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eLearning Manager Administrator Guide

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Table of Contents

Preface vii

Purpose vii

Audience vii

Graphics vii

Typographic Conventions viii

Using Halogen's Documentation viii

Chapter 1: eLearning Manager Overview 1

Halogen eLearning Manager Overview 2

About eLearning Manager Roles 3

Access Rights and Permissions 3

About the Learning Activity Workflow 7

Searching for Learning Elements 10

Entering Multilingual Display Text 13

A Quick Tour of the Learning Control Center 14

About the Learning Page 15

Chapter 2: Catalogs 19

About Catalogs 20

Adding a Catalog 21

Editing a Catalog 22

Deleting Catalogs 22

About Catalog Statuses 23

Filtering Catalogs by Status 23

Sorting the Catalog List 24

Archiving a Catalog 24
Changing the Default Catalog 25
Assigning Catalog Managers 25

Chapter 3: Learning Units 27
About Learning Units 28
Creating Learning Units 29
Importing Learning Units Using a Text File 33
Importing SCORM/AICC Types of Learning Units . . . 36
Troubleshooting AICC Learning Units 37
Editing Learning Units 38
Changing the Status of a Learning Unit 38
Deleting Learning Units 39
Managing Content in a Learning Unit 40
Managing Resources in a Learning Unit 41
Managing Results Settings for a Learning Unit 43
Managing Prerequisites for a Learning Unit 45
Viewing Associated Certifications 47
Viewing Associated Learning Paths 47

Chapter 4: Certifications 49
About Certifications 50
Creating a Certification 51
Searching for Certifications 53
Viewing Certification Details 54
Editing Certification Details 54
Deleting Certifications 55
Archiving a Certification 56
Awarding Certifications Automatically 56
Awarding Certifications Manually 59
Adding Learning Units and Paths to Certifications . . . 61
Renewing an Employee's Certification 62
Editing An Employee's Awarded Certification 63
Deleting an Employee's Certification 64
About Certification Notifications 64
Configuring Certification Notifications 64
Printing Certifications 67

Chapter 5: Learning Paths 69
About Learning Paths 70
Creating Learning Paths 71
Editing Learning Paths 73
Changing the Status of a Learning Path 75
Deleting Learning Paths 75
Adding Learning Units to a Learning Path 76
Adding Students to a Learning Path 78
Viewing Associated Certifications 82

Chapter 6: Sessions 83
About Sessions 84
Adding a Session 85
Editing a Session 87
Deleting a Session 88
Canceling a Session 88
Filtering the Session List 89
Sorting the Session List 89
Viewing Session Details 90

Chapter 7: Working with Students 91
About Working with Students and Sessions 92
Adding Students to a Learning Unit 93
Adding a Group to a Learning Unit 95
Deleting Students from a Learning Unit 96
Enrolling Students in Session-based Learning 97
Adding Students to the Session Student List 98
Deleting Students from the Session Student List 101
Entering Session Results for Students 102
Entering Results for Non-session-based Learning . . .104
Importing Learning Results for Students 105
Printing Student Lists 107
Filtering the Student List 108
About the Waiting List 109
Sending Students from Waiting List to the Student List .109
Adding Notes Regarding Students 110

Chapter 8: Working with Learning Requests 113
About Approving and Denying Learning Requests 114
Approving or Denying Requests for Learning 116
Approving or Denying Learning Requests for Several Employees at Once 117
Approving or Denying Learning Requests for Individual Employees 118
Skipping Approvals 119
Adding a Note to Learning Requests 121
Viewing Notes Associated with Learning Requests 122

Chapter 9: Learning Options 123
Configuring Learning Options 124
Viewing and Sorting Learning Option Lists 125
About Approval Policies 126
Adding Approval Policies 127
Editing Approval Policies 130
Deleting Approval Policies 132
About Regions 132
Adding Regions 133
Editing Regions 134
Deleting Regions 134
About Professional Credits 135
Adding Professional Credits 135
Editing Professional Credits 137
Deleting Professional Credits 138
About Learning Types 138
Adding Learning Types 139
Editing Learning Types 140
Deleting Learning Types 141

Chapter 10: eLearning Manager Notifications 143
About eLearning Manager Notifications 144
Enabling eLearning Manager Notifications 145
Configuring eLearning Manager Notification Policies . .146
Sending eLearning Manager Notifications Manually . .148
Sending Notifications to Next Approvers 150

Chapter 11: eLearning Manager Calendar 153
About the eLearning Manager Calendar 154

Browsing Sessions 155
Filtering the Calendar 157
Viewing Different Dates on the Calendar 158
Customizing the Calendar Colors 158
Exporting Session Information to Outlook 159
Viewing Learning Unit Details from the Calendar 160
Changing the Calendar's Time Zone 161

Chapter 12: eLearning Manager Reports 163

About eLearning Manager Reports 164
About Training Reports 165
About Training Impact Reports 166
About Certification Reports 168
About Competency Scores Reports 168
Viewing a Training Report 169
Viewing a Training Impact Report 171
Viewing a Certification Report 173
Viewing a Competency Scores Report 175
Customizing Report Columns 177
Sorting Report Columns 178
Printing Reports 178
Exporting Reports 179
Hiding Report Filters 180

Index 181

Preface

Purpose

The *Halogen eLearning Manager* application is part of *Halogen's Talent Management Suite* of Web-based talent management software solutions. *Halogen eLearning Manager* is a robust learning management system that can be used to manage all aspects of employee learning within your organization.

The purpose of the *Halogen eLearning Manager Administrator Guide* is to familiarize users with the application and provide information on the various features and functionality used to manage and participate in the learning management system.

Audience

The *Halogen eLearning Manager Administrator Guide* is intended for end users such as administrators, managers with specialized roles and privileges, and in certain cases human resources representatives.

This *Administrator Guide* assumes that you have a basic knowledge and understanding of Windows applications and Web browsers. Great depth of knowledge is not required, but it would be helpful to understand basic Windows terminology, such as double-clicking, menu bars, links, and dialog boxes.

Graphics

The appearance of graphics found in this document may vary from your site, depending on your site's customization of *Halogen's Suite* of applications, its configuration, and the operating system used.

The operating system used to create this document was Windows XP. The default configuration of *Halogen's Suite* was applied.

Typographic Conventions

Typographic conventions make written material easier to understand by helping to identify the type of information being presented. This document uses the conventions listed in the following table.

Table 3-1 Conventions Used in this Document

Convention	Use
Fonts	The main body of this guide uses the Times New Roman (serif) font for print, and Arial (sans serif) for online versions. The labelling of graphics in this guide uses the Arial (sans serif) font.
Bold	The use of **Bold** text highlights items you can select in *Halogen's* interface, including buttons, tabs and menu selections. It is also used in the identification of dialog boxes, pages, and specific application terms.
Red Italic	The use of *Red Italic* text indicates that there is a link to another section of the document that pertains to the text being read. When you click on the link, the related text is displayed. The online Help version uses "Blue" links.
Italic	The use of *Italic* text indicates a book title, product names, variables and highlights important terms and or information.

Using Halogen's Documentation

The *Halogen eLearning Manager Administrator Guide* contains information about the tools and commands of the application.

A printable version of the *Administrator Guide* is available in PDF format on the *Halogen* product CD. If you view the Guide electronically, active links are present to allow for navigation through the document to assist you in finding desired information.

Halogen's Suite of applications also includes complete documentation in an HTML-based Online Help version, which can be accessed within the application. To launch the Online Help, click the "Help" link located in the top right corner of most screens.

Chapter 1

eLearning Manager Overview

Chapter Scope

This section introduces *Halogen eLearning Manager*, a Web-based application in the *Halogen Talent Management Suite*. You will be provided with a summary of the *Halogen eLearning Manager* application functions and features.

The section topics are as follows:

- *"Halogen eLearning Manager Overview" on page 2*
- *"About eLearning Manager Roles" on page 3*
- *"About the Learning Activity Workflow" on page 7*
- *"Searching for Learning Elements" on page 10*
- *"Entering Multilingual Display Text" on page 13*
- *"A Quick Tour of the Learning Control Center" on page 14*

Halogen eLearning Manager Overview

The *Halogen eLearning Manager* web-based module - melds breakthrough thinking in employee performance management with proven best-practices in learning management, giving you the power to deliver training and development programs that truly impact your organization's bottom line. It's simple to use and lets you quickly and easily see a return on your training investments.

By integrating learning and performance management, you can improve business performance, achieve corporate alignment, build employee engagement and realize the value of their training and development initiatives.

The Learning Management System makes it easy to develop and maintain course catalogs and programs, select and register employees, review attendance of courses, and certify completion of learning activities.

eLearning Manager Benefits and Features

Based on the latest research in learning management, *Halogen eLearning Manager* is a revolutionary, enterprise-class solution that meets the needs of all organizations, regardless of size. Unlike other learning management systems that simply automate your learning department's administrative tasks, *Halogen eLearning Manager* integrates fully with *Halogen eAppraisal* so you can:

- Easily identify individual and organizational skill development needs and provide the right training and development activities that improve business performance.
- Ensure individual and group training programs are aligned with development plans, performance gaps, succession needs and, most importantly, corporate goals.
- Make your full training catalog easily accessible to managers and employees, when and where they need it.
- Measure the effectiveness of your skills development programs by tracking employee performance improvements over time and improved corporate performance.
- Empower employees to manage their own skills, performance and development plans, and launch targeted learning activities all from one place - building employee engagement.
- HR managers can consolidate information, such as performance ratings and gaps, skills and competencies, training compliances, and succession data.
- Managers have one place to go for managing and tracking goals, employee evaluations and assessments, succession plans, coaching and employee development.
- Easily manage all aspects of enrollment, including auto-enrollment, and prerequisite and certification tracking.

- Supports Web-based and or blended course deliver.

About eLearning Manager Roles

New roles will be available within the *Halogen eLearning Manager* module. A user may have more than one of the Learning Management roles, in addition to other *Halogen Product Suite* roles when and where applicable. As with all roles, they must be assigned in the User Center.

For more information on roles, access rights and permissions, see *"Access Rights and Permissions" on page 3*.

The new roles available in the *Halogen eLearning Manager* module are:

- Learning Administrator
- Catalog Manager
- Enrollment and Session Manager
- Learning and Development Specialist
- Instructor

Access Rights and Permissions

Every employee of an organization is entered into the User Center. Some employees are then assigned roles which will enable them to access various elements of the application and designated employee information. Various access rights and permissions are associated with the assigned roles.

It is critical to ensure security for all participants, and that all employee information collected is kept confidential. Therefore, only Super Users will have complete access to all users and their data. Super Users also have the ability to assign or revoke access at any time.

While every company is different, the following illustrates different users and a variety of roles with associated access rights and or permissions within the *Halogen eLearning Manager* module.

Table 1-1 A Quick Glance at Access Rights and Permissions

Role	Access Rights and Permissions
Super User	This user can create new Processes and has complete access to all Processes and tasks within the *Halogen* product suite. They can assign roles and grant access rights and permissions to all users and participants, with complete access to all employee information in the User Center. Super Users will have access to every part of the “HR Control Center”, and the “Learning Control Center” of the *eLearning Manager* module. A Super User is usually filled by an HR employee
Company Coach	This user will act as the Company Coach for the entire organization. They will have access to all employees in the User Center except for those that work in the same department as them. They are able to access employee records using an area called “My Coached Employees” from the responding side of the application. All assigned employees will be presented in a list with access to employee records that have been made available to the Coach.
Career Coach	This user will act as the Career Coach to assigned employees. They will be assigned to employees just as HR Reps and Managers are; from the “Assignment” tab of the “User Properties” detail page. They are able to access employee records using an area called “My Coached Employees” from the responding side of the application. All assigned employees will be presented in a list with access to employee records that have been made available to the Coach.

Table 1-1 A Quick Glance at Access Rights and Permissions

Role	Access Rights and Permissions
Learning Administrator	This user has full add/edit/delete/view access to *eLearning Manager* notifications, regions, learning types, professional credits and approval policies. They also have full access to catalogs, learning units, paths and certifications. They can assign users roles, such as a Catalog Manager to specific catalogs. They can view the Calendar for available and full sessions, but are not able to view registered sessions from the Calendar. Learning Admins will have access to all reports with the exception of the “Competency Score” report. Learning Admins are able to import SCORM 2004 compliant learning. Admins also have full access to sessions, and can add and remove employees on student lists for enrollment in both session and non-session learning and add and remove students on waiting lists for session based learning. They can update statuses and enter results manually or by import for both session and non-session based learning. The Learning Administrator can enter learning activity notes for a learner. They will have access to the Approval Center. **NOTE:** This role is available only with the *Halogen eLearning Manager* module.
Catalog Manager	This user can create/edit/delete learning units, learning paths and certifications that are in their assigned catalogs including archived catalogs. They also have enrollment and session Manager permissions for assigned catalogs, and can add and remove students on waiting lists for session based learning. For assigned Catalogs only, they can update statuses and enter results manually or by import for both session and non-session based learning. Catalog Manager is able to import SCORM 2004 compliant learning. The imported material must automatically go into an assigned catalog. The Catalog Manager can enter learning activity notes for both session and non-session based learning provided that learning activity exists in one of their managed catalogs. They will have access to the Approval Center. **NOTE:** This role is available only with the *Halogen eLearning Manager* module.

Table 1-1 A Quick Glance at Access Rights and Permissions

Role	Access Rights and Permissions
Enrollment and Session Manager	This user can create/edit/delete all sessions, and can assign instructors to sessions. From the Calendar they can view entries for available and full sessions. Only active Catalogs may be viewed, with final session-based Learning Units, Paths and Certifications. Non-session based learning items will not appear. They can add and remove session participants and manage waiting lists for session based training. Sessions can be viewed, and they can update statuses and enter course results manually or by import for session based learning activities. The Enrollment and Session Manager can enter learning activity notes for session based learning. They will have access to the Approval Center. **NOTE:** This role is available only with the *Halogen eLearning Manager* module.
Learning and Development Specialist	This user can assign employees to the training they need and can view employee data. They can assign training and when requested, can approve learning enrollment requests and enter course results into employee records. From the Calendar they can view available and full session entries. Only active Catalogs may be viewed, with final Learning Units, Paths and Certifications. Employees can be added to both session and non-session based learning student lists by the Specialist, and waiting lists for session-based learning. Sessions can be viewed, and they can update statuses and enter results manually or by import for both session and non-session based learning. They will have access to Training and Training Impact reports, Certification and Competency Score reports. The L&D Specialist can enter learning activity notes for both session and non-session based learning. They will have access to the Approval Center. **NOTE:** This role is available only with the *Halogen eLearning Manager* module.

Table 1-1 A Quick Glance at Access Rights and Permissions

Role	Access Rights and Permissions
Instructor	This user will provide training and can view the Calendar to see sessions where they are the assigned Instructor. They can view and print class and waiting lists, manually enter or import course results and completion records. They can also view and print files associated with learning units that are not presented to students (for example, a blank course completion survey). They can also view assigned items in the Calendar and Catalog(s). Instructors can enter learning activity notes in session-based learning where they are the assigned instructor. They will have access to the Approval Center. **NOTE:** This role is for use with the *Halogen eLearning Manager* module.
Manager	This user is responsible for managing their direct reports. They review employees and can make recommendations for inclusion into the various training activities.
Student	This user is usually any employee that is eligible for training. The student can access their Personal Pages, manage their Journal Notes, and access the Learning Catalog, and Calendar

About the Learning Activity Workflow

Employees, management and Learning Administrators have multiple ways of adding learning activities within the *eLearning Manager* module. Learning can be added on a form through development plans, it can be added into a Development Plan in the employee records, learning can be added directly from the Learning Management Center, or it can be added from the student list of a Learning Unit, Path or Session.

- Employees can enroll in a Learning Unit, Learning Path or Session using the Learning Center through the Development Plan area in My Performance (from the Development Plan or the Development Plan list).
- Management can add learning activities to employees through an Appraisal or Talent Assessment Form, or from the employee records of direct reports, representees or coached employees.
- Administrators can add learning activities to employees from the Student list of a Learning Unit, Session or Path within the Learning Control Center.

Employees, management and administrators will be warned if prerequisite conditions have not been met.

Adding Learning Activities

Once a learning activity is added to a Development Plan for an employee, the system will determine the status of the learning activity. It could have the status of “On Waiting List”, “Requiring Session Selection”, “Under Approval” or “Enrolled”.

- When a learning activity is added for a session that is full (the number of maximum students has been reached), the status of the activity will be “On Waiting List”.
- A session based Learning Unit can be added with no session picked. In this case, the added learning activity has a status of “Requiring Session Selection”. It will stay in that state until the employees, management or an administrator picks a session from the learning activity of the Development Plan or from the student list of the Learning Unit. Employees can only select the session if self enrollment is enabled.
- A learning activity that is not “On Waiting List” or “Requiring Session Selection” will have a status “Under Approval” when approvals are required or “Enrolled” if no approvals are required or if all approvals are automatically skipped.
- Whenever a prerequisite of the learning unit is not met by the student, a note will be added to the learning activity. The note will say: “A prerequisite requirement for this activity has not been met”. To meet the prerequisite, the student must have a learning activity for the prerequisite with a status of complete and the pass/fail flag set to “no results” or “pass”.

The Approval Process

All Learning Units will have an approval policy set in their properties. The approval process will go through each role/user selected in the approval policy and ask them for an approval. The learning activity can then be approved or denied. Once approvals are complete, the status of the learning activity will either be “Enrolled” or “Denied”.

- The Learning Unit could have the approval policy where “no” approvals are required. In this case, the learning activity for the Learning Unit will have a status of “Enrolled”.
- A Learning Unit that requires approval will go through each approver in the approval policy. The approver can be determined by roles or specific employee selection. The order of approval is defined and this sequence will be kept while approving. The name of the approver and date the learning activity was approved or denied is saved and displayed in the learning activity.
- When a role specific approval is required but no one fits the role, the approval is skipped. For example, if the career coach role is next in the approval policy but that employee doesn't have a career coach assigned, then the approval is skipped.
- Once a learning activity has been denied, the status of the activity and the approval will change to “Denied” and the approval process will stop.
- From the student list in the Learning Control Center, an Learning Administrator can cause an approval to be skipped.

Learning Activity Actions

Actions can be performed on the learning activity either manually or automatically.

- When a learning activity has a status of “Requiring Session Selection” or “On Waiting List”, the student (only if self enrollment is enabled), management or administrator may select a session for the learning activity. This can be done on the Development Plan list by clicking on the status of the activity or from the student list of the Learning Unit.
- Before assigning a session to multiple employees, the system checks to make sure that the session has enough seats available. It prevents Learning Administrators from assigning sessions until they select a number of employees less or equal to the number of available seats.
- When the status of a learning activity is changed to complete and the pass/fail flag is set to “Pass”, the system will check to see if a certification should be automatically awarded. When the learning activity is part of a path and the student completed the last activity in the path, then the certification will be automatically awarded if all the learning is completed and passed.
- When a learning activity status is changed to complete and the pass/fail flag is set to “Pass”, the number and type of professional credits will be saved with the learning activity.
- A learning activity can be deleted at any point in the student list. Management can delete the activity when the current status is “On Waiting List”, “Under Approval” and “Requiring Session Selection”. An employee will only be able to delete learning that they added. The deletion of an activity for a specific session will trigger the auto processing of the waiting list.
- A result can be entered for each learning activity. The results can be a percentage or score and/or a pass/fail flag, depending on the defined learning unit options.
- Students can enter results and change the learning activity to the “Withdrawn”, “Incomplete” and “Completed” status when the option “Employee, Management and Learning Administrators” for “Who may enter results” is selected for the Learning Unit. Students can always add a note for the activity only if the student created it. Selecting a session will be accessible if the option “Employee cannot self enroll” is off for the Learning Unit.
- Management can enter results and change the learning activity to the “Withdrawn”, “Incomplete” and “Completed” status when the option “Management (Direct Manager, HR Rep, Coach) and Learning Administrators” for “Who may enter results” is selected for the Learning Unit. Management can always add a note, for the activity and select a session.
- Whenever a session is cancelled from the session list, all the learning activities for that session will have a status of “Requiring Session Selection”.

- Employees who are on the waiting list for a session will have their learning activities set to a status of "Requiring Session Selection" after the last day for that session is passed.
- Learning activities that have a status of "Denied" cannot have that status changed.
- Development plans will be automatically set to a status of "Completed" when all of the learning in that development plan is marked as completed.

Searching for Learning Elements

The Learning Management system allows you to quickly search, browse and manage learning elements, such as Learning Units, Learning Paths, and Certifications.

The Learning page offers free text and advanced search options including filter drop-down lists. You can search by Type, Catalog, Cost, Region and Status. Selecting the various filter and status options of key column headers, will return learning elements search results based on the selected filtering.

The state of the search filters will be retained for the duration of your session. If you navigate to a new page, returning to the Learning page will retain the state of all previously selected filters, advanced toggle state, sorting and page number display.

For more information on searching, sorting, navigating and printing, see any of the following:

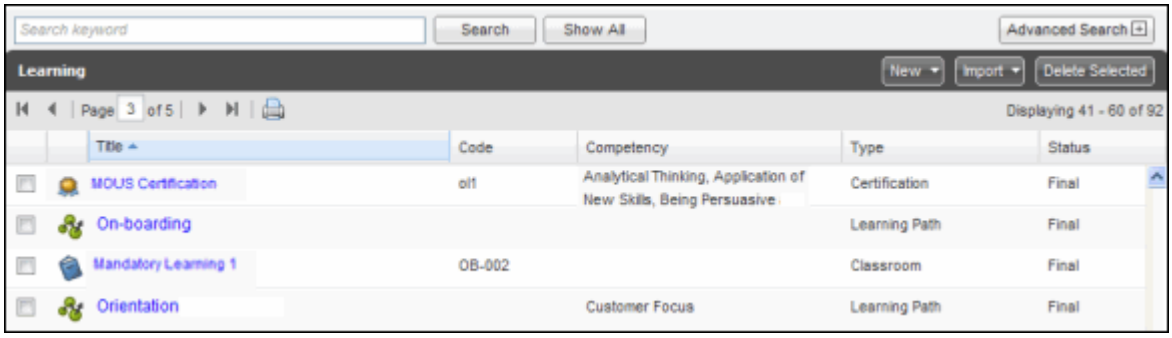
- *"To Search for a Learning Element" on page 11*
- *"To Search Using Advanced Criteria" on page 11*
- *"To Sort the Search List" on page 13*
- *"To Navigate the Search List" on page 13*
- *"To Print the Search List" on page 13*

To Search for a Learning Element

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.



2 To perform a free text search, enter text in the text field, and click the **Search** button.

The default state is the text field displays “Search keyword”.

- The following attributes will be checked for occurrences of the text string: code, title, description, purpose, competency and keywords.

NOTE: Using the “Enter” key after entering text has the same effect as clicking the **Search** button.

3 To reset filters, click the **Show All** button.

This will reset all filter selections back to their default states.

NOTE: To execute a new search using the default states, click the **Search** button.

To Search Using Advanced Criteria

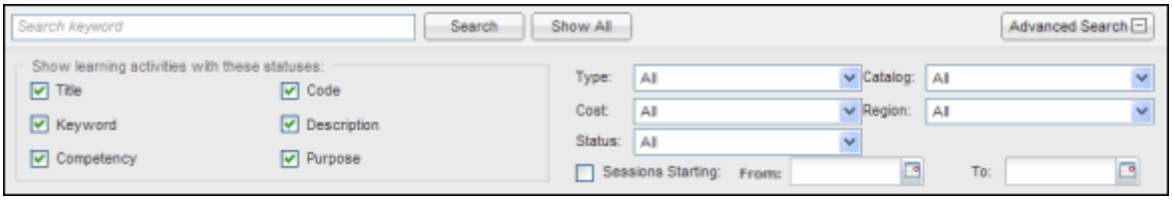
1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **Advanced Search** button.

The Advanced search area expands.



NOTE: The Advanced search area will be hidden by default. Use the **Advanced Search** button to toggle the area to be shown or hidden.

3 In the **Show learning activities with these statuses** area, select the appropriate check box(es).

All check boxes are checked by default, and the text filter will be used in the search.

NOTE: When a check box is not selected that item will not be searched.

4 To search specific types, select from the **Type** drop-down list.

The “All” option is selected by default, and no filtering will occur.

- Following “All” will be Learning Unit, Learning Path, and Certification.
- A dashed line will separate the system defined types with user defined types. For example your organization may include types such as Classroom, External or Online.

NOTE: Selecting the dashed line will perform no filtering based on type with results the same as if the “All” option was selected.

5 To search specific catalogs, select from the **Catalog** drop-down list.

The “All” option is selected by default, and no filtering will occur.

- Following “All” will be a list of each catalog.
- Archived catalogs will display the name of the catalog followed by the suffix “(Archived)”.

NOTE: Archived catalogs will only be available to users with the following roles: Super Admin, Learning Administrator, and Catalog Manager.

6 To search specific cost criteria, select from the **Cost** drop-down list.

The “All” option is selected by default, and no filtering will occur.

- Following “All” will be With cost and No cost.

NOTE: Since Learning Paths and Certifications do not have cost associated with them, selecting either of those options will reset the filter to “All” and the list becomes disabled until another type with cost criteria is selected.

7 To search specific regions, select from the **Region** drop-down list.

The “All” option is selected by default, and no filtering will occur.

Following “All” will be a list of regions that have been preconfigured into the system.

8 To search specific statuses, select from the **Status** drop-down list.

The “All” option is selected by default.

- Following “All” will be Draft and Archived, Final and Draft/Final.
- No filtering will occur if the “All” option is selected.

NOTE: The Status list will only be available to users with the following roles: Super Admin, Learning Administrator, and Catalog Manager. For all other users the Status filter is hidden and all searches will be based on a status of Final.

9 To search for sessions, select the **Sessions Starting** check box.

With this enabled you can search for sessions based on dates.

- Since a session is the only learning element with start and end dates, only learning sessions will be returned in the search results.

NOTE: The check box is toggled off by default.

10 In the **From** and **To** area, click the **Calendar** icon and select dates.

You must provide a valid date range.

NOTE: Any Learning sessions that are scheduled to begin within the defined date range will display.

11 Once you have located the Learning Element, you can click on the **Title** link.

The “Details” page for the Learning Element displays.

To Sort the Search List

1 To sort a **Search** list, click the **Column Header** for the column you want to sort.

The sorting arrow indicates the ascending or descending sorting direction.

- Click the same column header again to sort in the opposite direction.

The entire list of a multiple page list will be sorted, and not just the currently displayed page.

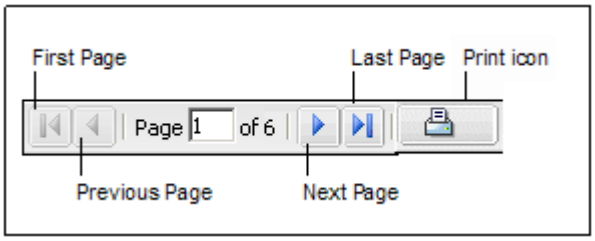
NOTE: The **Competency** column cannot be sorted.

To Navigate the Search List

1 When the list exceeds one page, use the **Page Navigation** buttons to move through pages.

Each page displays a maximum of 20 entries.

- The **Page Navigation** toolbar is comprised of the following icon driven features:



To Print the Search List

1 Click the **Print** icon.

A new browser window opens.

2 Click the **Print** icon on the top right hand side of page.

You may then use the browser’s native printing functionality.

Entering Multilingual Display Text

Halogen’s Product Suite supports many languages for text display. Once additional languages have been defined, an administrator can use the “Language” list to enter display text in the selected language.

NOTE: The “Language” list is defined in the HR Control Center, within the User Interface settings of the Options tab.

With the *eLearning Manager* module, any option that allows multilingual editing will feature an alphabetical “Language” list of preconfigured languages in the top right of the page or pop-up, under the “Title” bar. If English is the only configured language, the “Language” drop-down list will not appear.

When adding a new item, and language specific versions of a field are not defined, they will use the default language entry. For example if English is the default, and no French text is entered, the English text will be used in the French text field. However, when editing an existing record and a user clears an existing French text entry, they will be warned of the mandatory nature of the field, and will be prompted to enter French text. Non mandatory fields will not produce a warning, but they also will no longer auto-populate with the default language if the field is left empty.

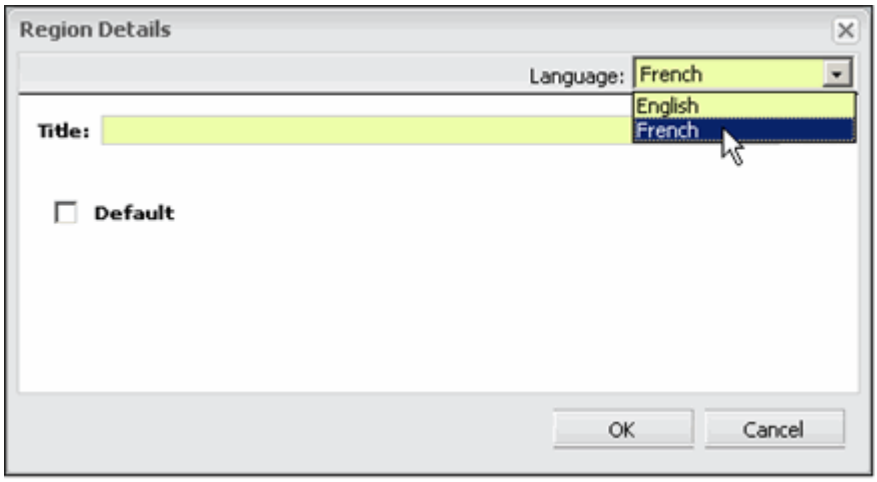
To Enter Multilingual Text

*If a page/pop-up produces a **Language** drop-down list, proceed as follows:*

1 Select a language from the **Language** drop-down list.

The list is preconfigured with available languages to choose from.

- The background color of a multilingual field will change to set it apart from the default language.



2 In the **Text** field, enter display text in the **Language** that has been selected.

In this example you can enter “French” display text for a “Region Title”. The text entered here displays when a user selects the “French” language for their session and views this “Region”.

A Quick Tour of the Learning Control Center

The following section provides an example of the Learning Control Center home page. Note that some panels, buttons, steps, color schemes and so forth might be different from your organization’s version of the *eLearning Manager* module.

The Learning Control Center is used for creating, maintaining, cataloging, reporting, enrolling and configuring learning elements, including Learning Units, Learning Paths and Certifications.

For more information on the Learning Control Center, see the following:

- *"About the Learning Page" on page 15*

About the Learning Page

The Learning Control Center opens on the Learning page, where you can access and manage Catalogs, Learning Units, Learning Paths, Sessions, Certifications, Approvals, Reports and Configuration options. The three main areas of the page, are the Header area, Search filters, and the Learning Element list.

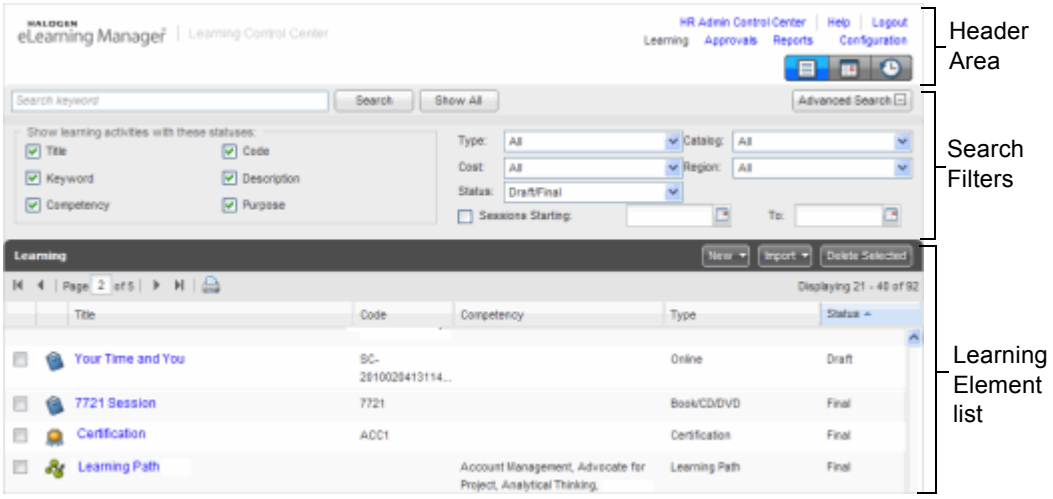


Figure 1-1 Example of the Learning page

For more information on the Learning page elements and features, see:

- *"The Header Area" on page 16*
- *"The Search Filters" on page 17*
- *"The Learning Element List" on page 18*
- *"Learning Elements Floating Tooltip" on page 18*

The Header Area

The Header area, shown in the image below, contains items for navigation and help, and it also provides access to important area of the application.

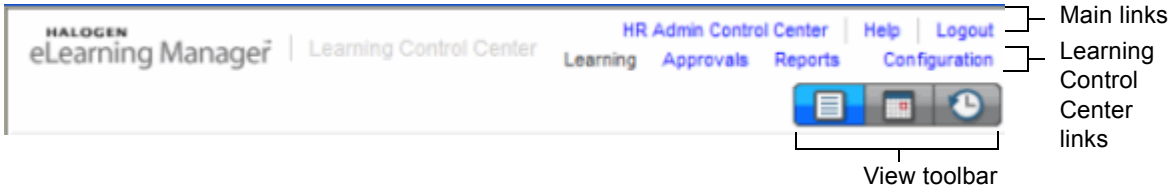


Figure 1-2 Example of the Header area

The first row of Main links are comprised of the following:

- HR Control Center - this link will refresh the browser to the HR Control Center view, and is only presented to administrators with access to the HR Control Center.
- Help - this link will launch a new browser window containing the online help for the *eLearning Manager* module.
- Logout - this link will logout the current user, refreshing the browser to the login screen.

The second row of Learning Control Center links are comprised of the following:

- Learning - this link will refresh the browser to the Learning-Search view. You can retrieve and manage Learning Units, Paths and Certifications. Clicking on a “Title” link of a learning element will display the “Details” page for the selected Learning Unit, Learning Path or Certification.
- Approvals - this link will refresh the browser to invoke the Approval Center, where you can approve or deny learning requested by students, if an administrator is part of the approval process.
- Reports - this link provides a menu to select the following: Training Report, Training Impact Report, Certification Report, and the Competency Score Report. Selecting a report will launch a new browser window where you can filter, view, select columns, and update the various views of the reports.
- Configuration - this link will invoke the Configuration view, where you can configure Catalogs, Learning Options and Notifications. From the Catalog tab, you can view, add, edit, delete and archive catalogs. The Learning Options tab provides access to add, edit and delete Approval Policies, Regions, Professional Credits, and Learning Types configuration. From the Notifications tab you can modify notification policies and messages.

The View Toolbar

The View toolbar provides three icons to quickly change views. The table below illustrates the three views that can be accessed using the icons.

Table 1-2 The View Toolbar Icons

Icon	Description
	List icon - will invoke the Learning list view
	Calendar icon - will invoke the Calendar view
	Previously viewed icon - will invoke a previously viewed learning element

The Show list view displays a list of all learning elements.

From the Calendar view you can browse learning item sessions in a monthly calendar format. You will also have the ability to filter the view by a preconfigured list of regions.

The Previously viewed learning icon will display a drop down menu listing the last 10 learning elements visited, with the most current visit appearing at the top.Selecting a learning element from the list will open the “Details” page for the selected learning element. The history list will only persist for the duration of your session, and will be cleared when you logout.

The Search Filters

The search filters allows you to quickly search, browse and manage learning elements, such as Learning Units, Learning Paths, and Certifications.

The area of filtering drop-down lists will perform searches immediately. You can search by Type, Catalog, Cost, Region and by Status. Selecting the various filter options will return learning element search results based on the selected filtering. You can also perform free text searches.

The state of the search filters will be retained for the duration of your session. If you navigate to a new page, returning to the Learning page will retain the state of all previously selected filters, advanced toggle state, sorting and page number display.

For more information on searching, see *“Searching for Learning Elements” on page 10*.

The Learning Element List

The Learning Element List displays learning elements, such as Learning Units, Learning Paths, and Certifications. You can filter the list using the Search filters and when the list exceeds twenty entries you can use the Page Navigation buttons.

By clicking on a "Title" link of a learning element the "Details" page for the selected Learning Unit, Learning Path or Certification will display.

For more information on searching and navigation, see *"Searching for Learning Elements" on page 10*.

Learning Elements Floating Tooltip

A floating tooltip will be available by pausing over a learning element "Title" link such as Learning Units, Learning Paths, or Certifications from the Learning page. An information bubble will display with the title, description and element related details of the learning element. Moving your mouse away from the learning element link will close the tooltip.

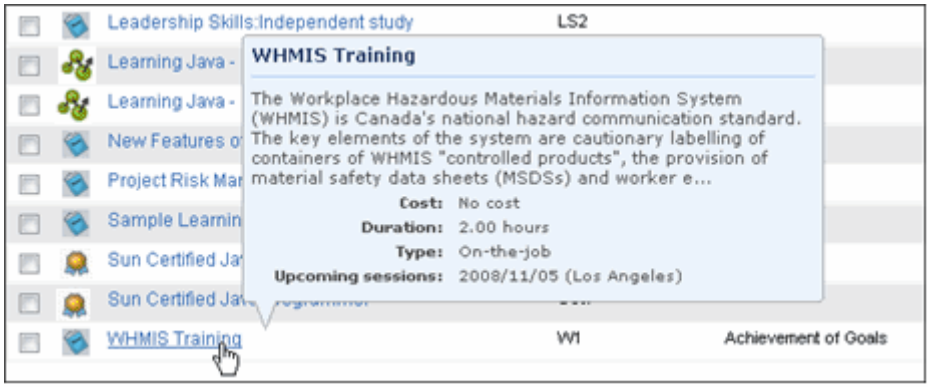


Figure 1-3 Example of the a Floating Tooltip Information Bubble

Chapter 2

Catalogs

Chapter Scope

This section describes *Halogen eLearning Manager* catalogs. These catalogs are used to group learning units and learning paths.

The section topics are as follows:

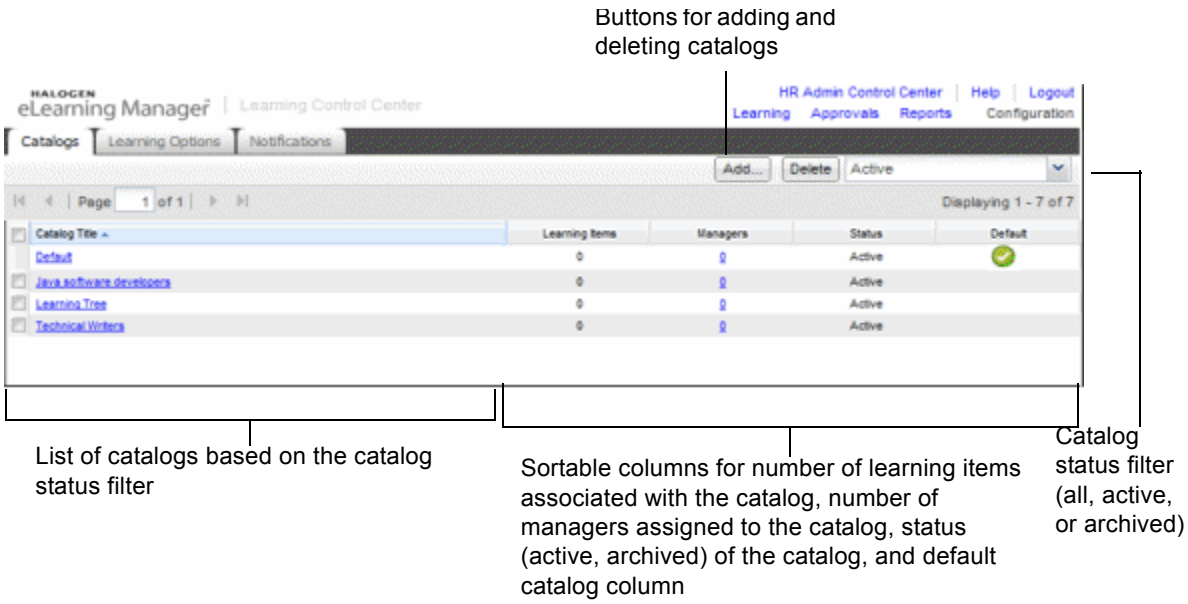
- *"About Catalogs" on page 20*
- *"Adding a Catalog" on page 21*
- *"Editing a Catalog" on page 22*
- *"Deleting Catalogs" on page 22*
- *"About Catalog Statuses" on page 23*
- *"Filtering Catalogs by Status" on page 23*
- *"Sorting the Catalog List" on page 24*
- *"Archiving a Catalog" on page 24*
- *"Changing the Default Catalog" on page 25*
- *"Assigning Catalog Managers" on page 25*

About Catalogs

Catalogs can be used as a method for grouping learning units and learning paths. Your system may have several catalogs available, but there can only be one default catalog. You can create, edit, and delete catalogs.

For example, suppose you work in a hospital. You could create catalogs for nurses and call one "Nurse Level 1." Inside the catalog, you could have a learning path for CPR training, nursing certifications, other various job-related learning units.

The following screen shows an example list of catalogs:



This screen provides you with a method of adding, editing, or deleting catalogs; a method of assigning managers to catalogs; and a method for viewing active, archived, or all catalogs.

See any of the following for more information on what you can do with catalogs:

- *"Adding a Catalog" on page 21*
- *"Editing a Catalog" on page 22*
- *"Deleting Catalogs" on page 22*
- *"Filtering Catalogs by Status" on page 23*
- *"Sorting the Catalog List" on page 24*
- *"Archiving a Catalog" on page 24*
- *"Changing the Default Catalog" on page 25*
- *"Assigning Catalog Managers" on page 25*

Adding a Catalog

Catalogs are used to group learning units and paths. Learning units or paths can appear in one or more catalogs. Add a catalog if you need to organize learning units and paths. For example, you may want to create a catalog for Java developers in your organization. This catalog might contain learning units such as Java programming courses, problem solving courses, and so forth.

Notes:

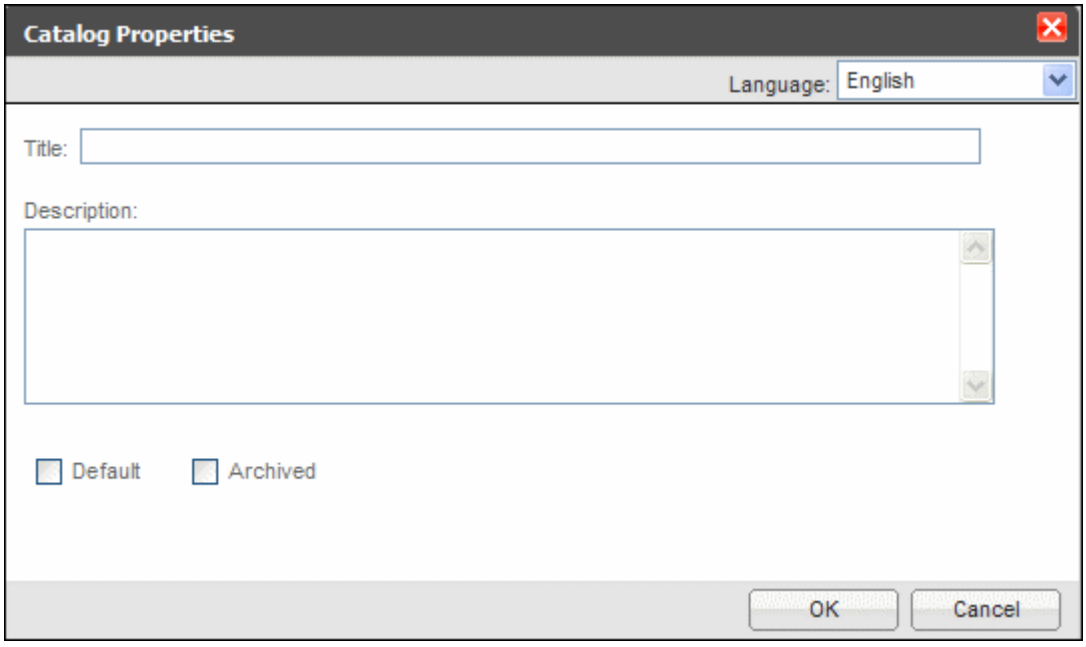
- Only Learning Administrators can add catalogs.
- Active catalogs must have unique names. If you need to give a new catalog the same name as an existing catalog, archive the old catalog first.

To Add a Catalog

1 From the **Learning Control Center**, click the **Configuration** link.

2 Click the **Catalogs** tab.

3 Click the **Add...** button.
The **Catalog Properties** window appears.



4 Enter a title for the catalog in the **Title** field.

5 (Optional) Enter a description of the catalog in the **Description** field.

6 (Optional) If you want to make this catalog the default catalog, select the **Default** check box.
For more information, see *"Changing the Default Catalog" on page 25*.

7 (Optional) If you want to archive this catalog, select the **Archived** check box.
For more information, see *"Archiving a Catalog" on page 24*.

8 Click the **OK** button.
The new catalog appears in the catalog list.

Editing a Catalog

If you need to edit a catalog, such as changing the title/description, you can do so at any time. In addition, you may want to change the status of a catalog to archive it. For more information, see *"Archiving a Catalog" on page 24*.

To Edit a Catalog

1 From the **Learning Control Center**, click the **Configuration** link.

2 Click the **Catalogs** tab.

3 Click the title link for the catalog you want to edit.
The **Catalog Properties** window displays.

4 Edit the catalog as required, such as editing the title and/or description.

5 Click the **OK** button.

Deleting Catalogs

Consider deleting a catalog if you are sure that you will not need it again. If you simply want to hide the learning units from employees, consider archiving it instead of deleting it. For more information, see *"Archiving a Catalog" on page 24*.

You cannot delete a catalog if it:

- contains any learning content (learning units, learning paths, or certifications)

OR

- is the default catalog

If you need to delete a catalog that has learning associated with it, delete its learning units, learning paths, and/or certifications first.

To Delete a Catalog

1 From the **Learning Control Center**, click the **Configuration** link.

2 Click the **Catalogs** tab.

3 Select the check box(es) next to the catalog(s) you want to delete.

If the catalog cannot be deleted, it will not have a check box next to it.

4 Click the **Delete** button.

5 Click the **OK** button to confirm.

About Catalog Statuses

Catalogs can have one of two statuses, active or archived. The table below describes these statuses.

Table 2-1 Catalog Statuses

Status	Description
Active	The catalog is ready to be viewed by all employees. Employees can enroll in content in active catalogs.
Archived	The catalog is inactive, but the catalog and its content, such as learning units associated with the catalog, are preserved. Employees cannot enroll in content contained in archived catalogs.

If you want to stop employees from enrolling in content in a catalog, consider archiving it. For example, if you find that the learning units/paths contained in a catalog are no longer applicable, you could archive the catalog.

When you add a catalog, it has a status of active. For more information on adding catalogs, see *"Adding a Catalog" on page 21*.

Filtering Catalogs by Status

By default, only your organization's active catalogs are displayed when you view the catalog list, but you can filter the list to only show active or archived catalogs. For example, suppose your organization has dozens of catalogs, which span several screens. If you want to find a specific archived catalog, you can select "Archived" from the drop-down list to view your organization's archived catalogs.

For more information on the catalog statuses, see *"About Catalog Statuses" on page 23*.

To Filter Catalogs By Status

1 From the **Learning Control Center**, click the **Configuration** link.

2 Click the **Catalogs** tab.

3 Use the drop-down list to change the status.

Sorting the Catalog List

By default, the catalogs in the catalog list are sorted alphabetically. However, you can sort any of the columns in the catalog list to find the catalog you are looking for. For example, to sort the catalog list based on the number of managers associated with each catalog, click the Managers column header. You can sort the catalogs by:

- title alphabetically
- the number of learning items associated with them
- the number of managers assigned to them
- their status (active or archived)
- their default or non-default status

To Sort the Catalog List

1 From the **Learning Control Center**, click the **Configuration** link.

2 Click the **Catalogs** tab.

3 Click the column header for the column that you want to sort.

An arrow appears to indicate whether the sorting is in ascending or descending order.

Tip: Click the column again to sort in the opposite direction.

Archiving a Catalog

You can archive a catalog if you do not want employees to view it and enroll in its associated learning units. For example, you might want to archive a catalog if it contains outdated learning activities, such as on-the-job training that is no longer applicable.

When you archive a catalog, the learning units within it are not deleted, so you can activate the catalog whenever you are ready for your employees to see the learning units associated with it.

Note, however, that existing learning activities for employees associated with the catalog contents will not be affected when you archive the catalog.

Finally, you cannot archive the default catalog. If you need to archive the default catalog, you must define a different default catalog first. For more information, see *"Changing the Default Catalog" on page 25*.

To Archive a Catalog

1 From the **Learning Control Center**, click the **Configuration** link.

2 Click the **Catalogs** tab.

The list of catalogs displays.

3 Click the title link for the catalog you want to archive.

The **Catalog Properties** window displays.

4 Select the **Archived** check box.

5 Click the **OK** button.

The **Status** column confirms that the catalog is now archived.

Tip: To change the status of the catalog to active, clear the **Archive** check box.

Changing the Default Catalog

The default catalog is the catalog in which all new learning content is placed (unless you specifically state which catalog you want new learning content to appear).

There can be only one default catalog. When you assign a new default catalog, the previous default catalog is no longer the default catalog.

1 From the **Learning Control Center**, click the **Configuration** link.

2 Click the **Catalogs** tab.

The list of catalogs displays.

3 Click the catalog that you want to make the default catalog.

The **Catalog Properties** window displays.

4 Select the **Default** check box.

5 Click the **OK** button.

A check mark appears in the **Default** column of the catalog list to identify the new default catalog.

Assigning Catalog Managers

If required, you can assign catalog managers to specific catalogs. Catalog managers can create, edit, and delete learning units, paths, and certifications for the catalogs that you assign to them. For more information on the catalog manager's role and privileges, see *"About eLearning Manager Roles" on page 3*.

A catalog manager can be anyone in the User Center, and you can assign catalog managers to one or many catalogs.

NOTE: Catalog managers do not have any control over the catalogs themselves, just the learning units, paths, and certifications inside them.

To Assign a Catalog to a Manager

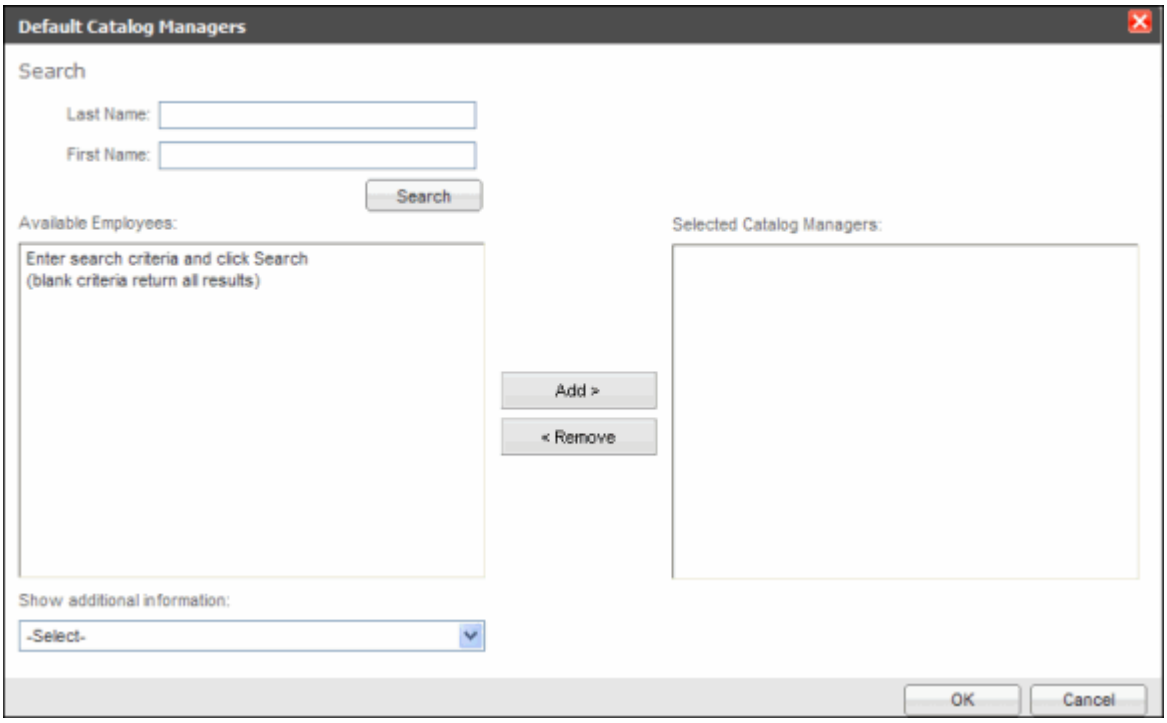
1 From the **Learning Control Center**, click the **Configuration** link.

2 Click the **Catalogs** tab.

3 In the **Managers** column, click the link for the catalog you want to assign a manager to.

For example, if there is no manager assigned to the catalog, click the number 0 in the catalog row.

The Modify Catalog Manager window displays showing the available employees and those already assigned (if applicable) to the catalog.



4 Enter the first few letters of the employee's last and/or first name in the **Last Name** and/or **First Name** fields, and then click the **Search** button.

Tip: If there are employees with similar names in your organization, and you need more information to identify the employee you want to assign as catalog manager, select either **Department** or **Email Address** from the **Show Additional Information** drop-down list.

5 Select the employee you want to assign as a catalog manager, and then click the **Add >** button.

6 Click the **OK** button.

Tips:

- To remove a catalog manager, select the manager in the **Selected Catalog Managers** area, then click the **< Remove** button, and then click the **OK** button.
- To start a new search, clear the **Last Name** and **First Name** fields, and then click the **Search** button.

Chapter 3

Learning Units

Chapter Scope

This section introduces Learning Units. A Learning Unit is a training related item that is part of the Learning Control Center. You can create, view, edit, and delete Learning Units. You can also manage content, resources, prerequisites, associated certifications and paths.

The section topics are as follows:

- *"About Learning Units" on page 28*
- *"Creating Learning Units" on page 29*
- *"Importing Learning Units Using a Text File" on page 33*
- *"Importing SCORM/AICC Types of Learning Units" on page 36*
- *"Editing Learning Units" on page 38*
- *"Changing the Status of a Learning Unit" on page 38*
- *"Deleting Learning Units" on page 39*
- *"Managing Content in a Learning Unit" on page 40*
- *"Managing Resources in a Learning Unit" on page 41*
- *"Managing Results Settings for a Learning Unit" on page 43*
- *"Managing Prerequisites for a Learning Unit" on page 45*
- *"Viewing Associated Certifications" on page 47*
- *"Viewing Associated Learning Paths" on page 47*

About Learning Units

Learning Units are entities used for learning, education and training related items that are part of the Learning Control Center. A Learning Unit can be a course, including eLearning, online books or reference, online document, assessment, simulation, video, webcast, online lab, mentoring, instructor-led training, to name a few.

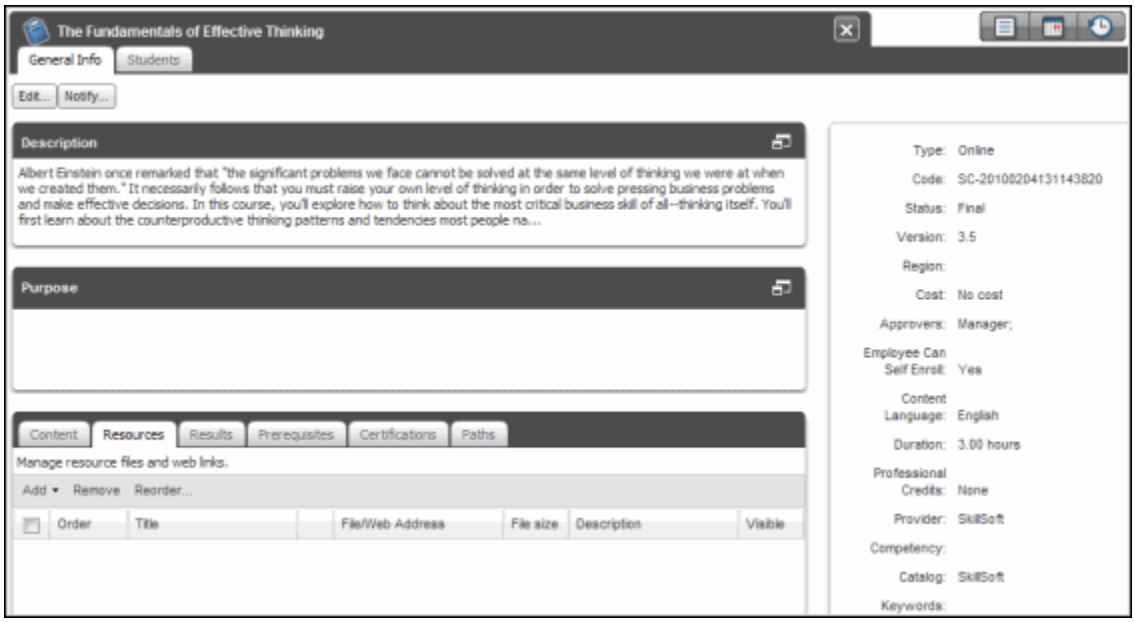
With the *Halogen eLearning Manager*, there are three ways to create Learning Units:

- To manually create Learning Units, see *"Creating Learning Units" on page 29*.
- To import a pre-existing collection of Learning Units, for example, from a different system, see *"Importing Learning Units Using a Text File" on page 33*.
- To import SCORM or AICC compliant Learning Units, see *"Importing SCORM/AICC Types of Learning Units" on page 36*.

Some Learning Units may allow employees to self-enrollment, while other units may only be assigned by managerial roles. In both cases, approvals may be required.

Learning Units can be accessed and are maintained in learning catalogs. You can use the "Type" filter to display only Learning Units.

Launching the Learning Unit title link produces the Learning Unit Details page.



From the Learning Unit Details page you can view and manage many aspects of the unit, such as altering the status, assignment into catalogs, edit descriptive text, a variety of course details, associated competencies, keywords and inclusion into catalogs.

The vertical panel to the right provides a snapshot view of some of the details of the Learning Unit.

For more information on working with Learning Units, see any of the following:

- *"Creating Learning Units" on page 29*
- *"Importing Learning Units Using a Text File" on page 33*
- *"Importing SCORM/AICC Types of Learning Units" on page 36*
- *"Editing Learning Units" on page 38*
- *"Changing the Status of a Learning Unit" on page 38*
- *"Deleting Learning Units" on page 39*
- *"Managing Content in a Learning Unit" on page 40*
- *"Managing Resources in a Learning Unit" on page 41*
- *"Managing Results Settings for a Learning Unit" on page 43*
- *"Managing Prerequisites for a Learning Unit" on page 45*
- *"Viewing Associated Certifications" on page 47*
- *"Viewing Associated Learning Paths" on page 47*

Creating Learning Units

Learning Administrators, Catalog Managers and Super Users can create the details of a new Learning Unit. When adding a Learning Unit you can define many aspects of the unit, such as the status and type of learning, various course details such as cost, duration, provider information, descriptive text, associated competencies, and keywords just to name a few.

New Learning Units will automatically be listed in the default catalog, but can be removed from the default catalog in addition to being added to other catalogs.

In order to be available for enrollment, a Learning Unit must have a status of "Final". Learning Units have the option to allow or disallow employee self-enrollment; units that disallow self-enrollment will require a manager or administrator to enroll the student.

To Create a New Learning Unit

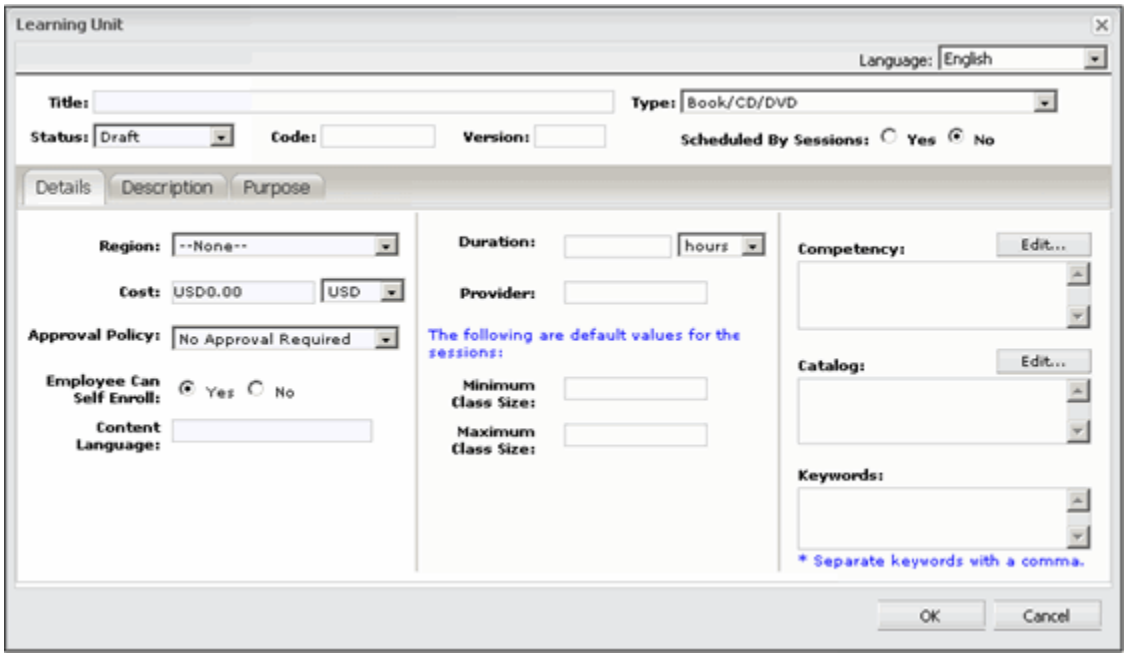
1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **New** button, and select **Learning Unit...** from the list.

The **Learning Unit** pop-up displays.



3 In the **Title** field, enter a title for the learning unit. (This is a mandatory property)

Learning unit titles can be up to 1000 characters in length.

NOTE: You can enter language specific titles using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

4 Select a learning type from the **Type** drop-down list.

The learning type describes the method in which the unit is delivered.

5 Select **Draft**, **Archived**, or **Final** from the **Status** drop-down list.

These statuses are used to control the visibility of units in the catalog, the default is **Draft** status.

- The **Draft**, and **Archived** units can be accessed by assigned administrators and cannot be viewed by students and managers.

NOTE: You cannot change the status of a learning unit that is included in a learning path. Also, you cannot change a learning unit to draft or archived if the unit is included as a prerequisite for another learning unit.

6 In the **Code** field, enter a code for the learning unit. (This is a mandatory property)

A code entry can be the course number for example, and it may be up to 30 characters in length.

NOTE: The code may be referenced when importing results for completed learning activities.

7 In the **Version** field, enter a version identifier for the learning unit.

Version text is not mandatory, but can assist in keeping track of versions of the learning unit.

- Version identifiers can be up to 50 characters in length.

8 In the **Scheduled By Sessions** area click the **Yes** or **No** radio button.

This indicates whether the learning unit has sessions scheduled for different dates and times.

- The default setting is **No** scheduled sessions, e.g., the course can be taken at any time.

NOTE: This option is not visible for SCORM/AICC related courses.

To Add Details to a Learning Unit

1 Click the **Details** tab.

The **Details** panel displays.

NOTE: The **Details** tab opens when you first enter the unit, you may not need to click the tab.

2 Select a region from the **Region** drop-down list.

You can select none, or from a preconfigured list of regions that can reflect places and locations.

3 In the **Cost** field, enter a value for the cost amount of the learning unit.

The field can remain empty, but a value range of 0 to 9,999,999.999 may be entered.

4 Select a currency from the **Cost** drop-down list.

The currency list is predefined with ISO supported currencies.

5 Select a policy from the **Approval Policy** drop-down list.

Each learning unit must specify one policy from the preconfigured list of policies.

NOTE: “No Approval Required” is also considered a policy.

6 In the **Employee Can Self Enroll** area click the **Yes** or **No** radio button.

When **NO** is selected only Direct managers, HR reps, Coaches or Administrators with access will be able to enroll students.

NOTE: Learning units will appear to students in the catalog, but they will not be able to enroll.

7 In the **Content Language** field, enter the language the course is offered in.

The field can remain empty, but if applicable it may be up to 30 characters in length.

NOTE: You can enter language specific text using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

8 In the **Duration** field enter a number and select a **scale** from the drop-down list.

When selected it will indicate the time frame required to complete the learning unit.

- The duration field allows a maximum of 5 digits (99,999), and fractions to 2 decimal places.
- The scale list is preconfigured to have hours, minutes, days, or weeks as choices.

9 In the **Provider** field, enter the name of the provider for the learning unit.

The field can remain empty, but if applicable it may be up to 100 characters in length.

10 In the **Class Size** fields, enter the minimum and maximum number of students that the class can accommodate.

The values entered will be the default values for the number of students that can be enrolled.

- The minimum number can be used to find under-sized classes, but the value can be over-ridden inside the session details.
- The maximum number can be used to trigger waiting lists, but the value can be over-ridden inside the session details.

NOTE: These values are only relevant to learning units that are session based.

11 Click the **OK** button, or continue entering/selecting information.

To Add Competencies, Catalogs and or Keywords

1 To add a competency to the learning unit, click the **Edit...** button in the **Competency** area.

The **Competency Selection** pop-up opens.

- Select from the **Available Competencies** list and click the **Add >** button, then click **OK** when complete.

NOTES:

- A learning unit initially has no associated competency, but can be associated to one or many competencies.
- Competencies must be flagged as available for the *eLearning Manager* Catalogs in the eAppraisal library process in order for them to appear in the **Available** list. For more information, see “Defining a Library Process” in the *Halogen eAppraisal Administrator Guide*.

2 To add the learning unit to a catalog, click the **Edit...** button in the **Catalog** area.

The **Catalog Selection** pop-up opens.

- Select from the **Available** list and click the **Add >** button, then click **OK** when complete.

NOTE: Learning Paths will automatically be added to the Default catalog, or can be assigned to one or more catalogs by a catalog manager.

3 To add keywords associated with the learning unit, enter text in the **Keywords** field.

Keywords can assist when searching for specific learning paths.

- Each keyword can be up to 100 characters in length.

NOTE: There is no limit for keyword used, but each keyword must be separated by a comma.

4 Click the **OK** button, or continue entering/selecting information.

To Enter a Learning Unit Description

1 Click the **Description** tab.

The **Description** text panel displays.

2 Enter a description in the **Description** text field. (This is not a mandatory property)

You can enter up to 100,000 characters of descriptive text.

NOTE: You can enter language specific descriptions using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

3 Click the **OK** button, or proceed to another tab and continue entering/selecting information.

To Enter a Learning Unit Purpose

1 Click the **Purpose** tab.

The **Purpose** text panel displays.

2 Enter a purpose in the **Purpose** text field. (This is not a mandatory property)

This can be used to describe the education objectives, and can be up to 2000 characters in length.

NOTE: You can enter language specific purposes using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

3 Click the **OK** button, or proceed to another tab and continue entering/selecting information.

Importing Learning Units Using a Text File

To import Learning Units, you must have a delimited text file. For example, if you have used a different Learning Management System in the past, you can use this system to export your Learning Units to a delimited text file. This text file can use tabs, commas, spaces, and so forth, as a delimiter.

You will also need to map the columns in your text file so that the information is correctly imported into the Learning Control Center. For example, suppose you have a text file that is tab-delimited, and it has four columns of data. The first column could be used to identify the title of the Learning Unit; the second column could be used to define the code for the Learning Unit; the third column could be used to identify the duration of the Learning Unit; and the fourth column could be used to indicate whether the Learning Unit is session-based learning or non-session-based learning.

In addition, you can import results information and you can import your Learning Units into specific catalogs.

If you want to update existing Learning Units, you can do so by using the Learning Unit code to identify the Learning Units you want to update. For example, if your text file has a code of "100A" and you already have a Learning Unit that uses the same code, the existing Learning Unit will be updated with the new information from the text file.

NOTES:

- Your text file must have columns for the code, title and type of a Learning Unit.
- You cannot import Learning Paths or Certifications.

Before you import your Learning Units, you might want to make sure that you have properly configured region information, catalog information, approval policies, and learning types in the application, as you will need to work with these settings when you import your Learning Units. For more information, see any of the following:

- *"About Regions" on page 132*

- *"About Approval Policies" on page 126*
- *"About Professional Credits" on page 135*
- *"About Learning Types" on page 138*

To Import Learning Units Using a Text File

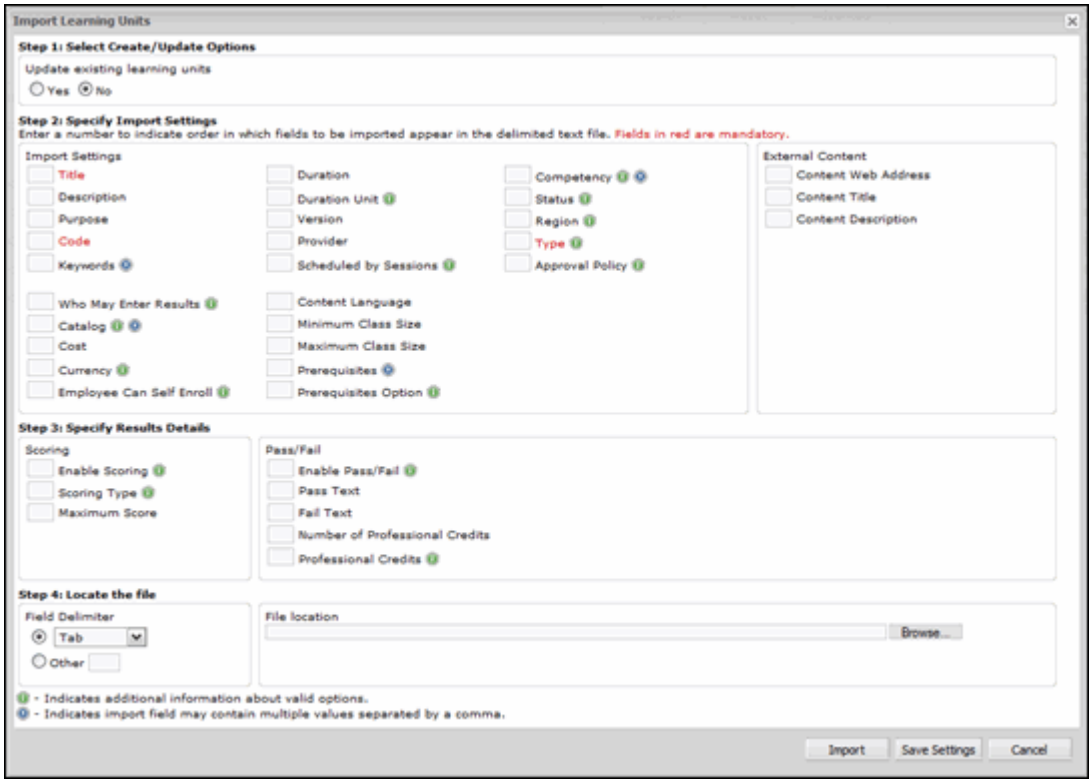
1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **Import** button, and then click **Learning Units...**.

The **Import Learning Units** window displays.



You must now complete the following four steps:

Step 1: Select the update options

Step 2: Specify the import options

Step 3: Specify the result details

Step 4: Locate the file

Step 1: Select the Learning Unit Update Options

For this part of the procedure, you must decide whether you want to update any existing Learning Units already in your system. If you choose "Yes" below, any existing Learning Units that share an

identical Code value to those Learning Units in your text file will be overwritten. If you choose “No” below, Learning Units with identical Code values will not be updated.

1 In the **Update existing learning units** area, do one of the following:

- Click the **Yes** radio button if you want to update any existing Learning Units

OR

- Click the **No** radio button if you want to keep your existing Learning Units

Step 2: Specify the Import options

1 In the **Specify Import Settings** area, enter numerical values for the **Title**, **Code**, and **Type** fields, and then configure any of the remaining options as required.

For example, if your text file has the title of the Learning Unit in the first column, the code in the second column, and the type in the third column, enter a **1** in the **Title** box, a **2** in the **Code** box, and **3** in the **Type** box.

Tip: Click the information icon next to an option for a list of possible values that you can use in your text file.

2 (Optional) In the **External Content** area, configure the options as required.

Step 3: Specify Result Details

1 In the **Scoring** area, configure the options as required.

2 In the **Pass/Fail** area, configure the options as required.

Step 4: Locate the file

1 In the **Field Delimiter** area, do one of the following:

- Use the drop-down list to select a delimiter.

OR

- Click the **Other** radio button, and then enter the character that your text file uses as a delimiter in the field.

2 In the **File location** area, click the **Browse...** button to locate the text file on your PC.

3 (Optional) Click the **Save Settings** button to save your settings.

4 Click the **Import** button.

The learning units that you successfully imported will now appear on the *eLearning Manager* page.

Importing SCORM/AICC Types of Learning Units

Sharable Content Object Reference Model (SCORM) and Aviation Industry Computer-Based Training Committee (AICC) are standards for delivering online content for training. Both SCORM and AICC content is stored in .ZIP files, which contain a manifest file (or files in the case of an AICC course) that describes the contents of the course.

Halogen eLearning Manager supports both SCORM and AICC. As such, you can import both of these types of Learning Units into the system. Further, you can combine several .ZIP files into a single .ZIP file to make uploading easier.

You can upload the .ZIP files into one or several catalogs. Two (2) gigabytes is the maximum file size per imported file.

After you have imported the .ZIP file, the system automatically creates a new Learning Unit for it. The title and description of the new Learning Unit is based on the title and description attributes in the .ZIP file's manifest file, so you may need to search for the new Learning Unit based on this title if you have many learning units in your system.

Some AICC Learning Units may not work properly when imported into the system. For more information, see *"Troubleshooting AICC Learning Units" on page 37*.

NOTE: The import process will handle SCORM content that contains multiple SCOs (SCORM 2004 only).

To Import SCORM/AICC Learning Units

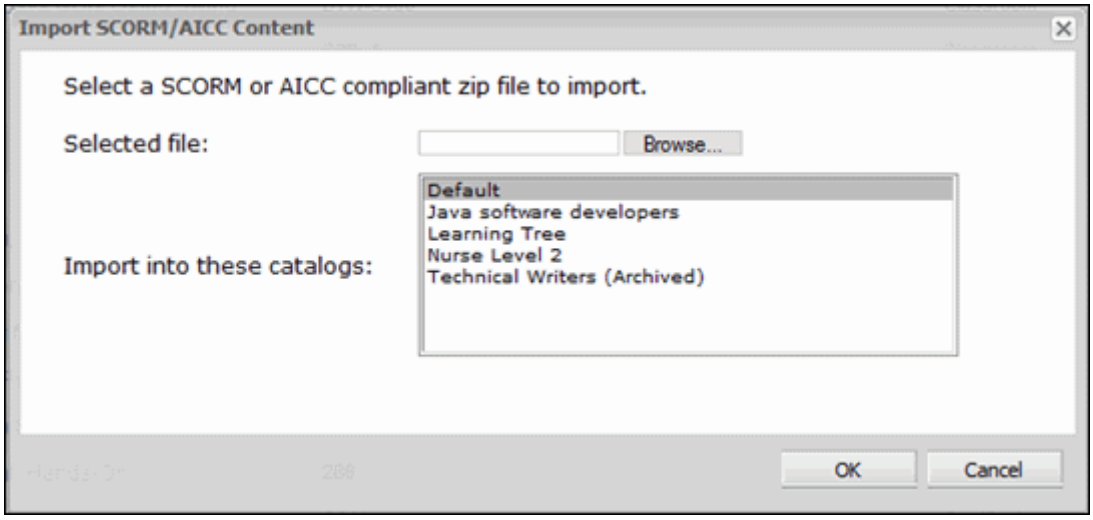
1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **Import** button, and select **SCORM/AICC...** from the list.

The **Import SCORM/AICC Content** pop-up window displays.



3 Click the **Browse** button to locate the .ZIP file containing the SCORM/AICC content.

4 In the **Import into these catalogs** area, select the catalog(s) you want to import the learning content into.

Tip: Hold down the CTRL or SHIFT key to select multiple catalogs at once or multiple adjacent catalogs, respectively.

5 Click the **OK** button.

A status message appears indicating if the import was successful.

6 Click the **Close** button.

The SCORM/AICC content is added as a learning unit with a “Draft” status. For more information on changing the status of the learning unit, see *“Changing the Status of a Learning Unit” on page 38*.

Troubleshooting AICC Learning Units

Some AICC courses are developed without knowing the final location of the course. This can cause problems when loaded into an system on a remote server when they are imported, as they will refer to a location that will be invalid. To successfully import and launch of AICC-compliant courses, you may need to edit the file called “course.au.” This file is located in the root directory of the uncompressed zip file.

To Edit the course.au File

1 Open the “course.au” file with any text editor.

2 Locate the value that corresponds to the field called "file_name", and make sure that it is a relative path to the root of the zip file.

For example:

"System_ID","type","file_name",…

"A001","Presentation","http://www.servername.com/presentation/index_learn.html",…

Should read:

"System_ID","type","file_name",…

"A001","Presentation","index_learn.html",…

If the index_learn.html file is located in a subfolder called "course", then it should read

"System_ID","type","file_name",…

"A001","Presentation","course/index_learn.html",…

3 Save the “course.au” file.

Editing Learning Units

Learning Administrators, Catalog Managers and Super Users can edit details of a Learning Unit. You can edit the title, status, code, version, session and learning details, associated competencies, catalogs, keywords, as well as unit description and purpose text.

All configurable attributes of a Learning Unit are editable for both SCORM/AICC and non-SCORM/AICC types, with two exceptions. Files associated with a SCORM/AICC type will not be editable. Also, the course type will be locked for SCORM/AICC compliant courses.

To Edit a Learning Unit

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **Title** link of the **Learning Unit** you want to edit.

The selected Learning Unit **Details** page displays.

3 Click the **Edit...** button.

The **Learning Unit** pop-up opens.

4 Edit the text fields and make selections as required. For more information on the Learning Unit fields and selection options, see *"Creating Learning Units" on page 29*.

NOTE: File associated with a SCORM type cannot be edited, and the **Type** learning option will be locked for SCORM/AICC compliant courses.

5 Click the **OK** button.

Changing the Status of a Learning Unit

When you first create a Learning Unit it will have the default status of "Draft".

The status of "Final" is similar to a process being opened and will appear in catalog views and be made available for student viewing.

If a Learning Unit becomes obsolete or you no longer want employees to enroll in the unit the solution may be to archive the Learning Unit. Learning Units with the status of "Archived" can be viewed by administrators when they choose the "archived" catalog filter.

Note the following rules regarding changes to the status of a Learning Unit:

- Once a Learning Unit has been assigned a status of "Final" or "Archived," its status cannot be changed back to "Draft."
- You cannot change the status of a Learning Unit that is included in a Certification. For more information on Certifications, see *"About Certifications" on page 50*.

- You cannot change the status of a Learning Unit if it is a prerequisite of another Learning Unit or if it is part of a Learning Path.

To Change the Status of a Learning Unit

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **Title** link of the **Learning Unit** you want to edit.

The selected Learning Unit **Details** page displays.

3 Click the **Edit...** button.

The **Learning Unit** pop-up opens.

4 Edit the status by selecting **Draft**, **Archived**, or **Final** from the **Status** drop-down list.

These statuses are used to control the visibility of the unit, and the default is the **Draft** status.

- The **Draft**, and **Archived** paths can be accessed by assigned administrators and cannot be viewed by students.

NOTE: Change the status to **Draft** when making changes to learning units. This prevents the unit from appearing in catalogs as changes are being made.

5 Click the **OK** button.

Deleting Learning Units

The Learning Administrator, Catalog Managers or Super Users can maintain Learning Units by deleting any unused units. Learning Units that are currently assigned to a student cannot be deleted.

You will be warned when deleting a Learning Unit that is part of a learning path.

Learning Units that are a prerequisite for another Learning Unit will produce a warning message when attempting to delete. If you continue with the deletion after the warning then the prerequisite requirement will be deleted from the other unit.

To Delete a Learning Unit

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Select the check box next to the **Learning Unit** you want to delete.

Check boxes are located to the left of the **Title** column, and can only be selected one at a time.

3 Click the **Delete Selected** button.

A confirmation pop-up opens.

NOTE: You will be warned and prevented from deleting a Learning Unit that has students. The student list must be empty before you can delete the unit.

- You will be warned when deleting a Learning Unit that is part of a learning path. If deleted, the unit will be deleted from the learning path.
- You will receive a warning message when deleting a Learning Unit that is a prerequisite for another unit. If deleted, the prerequisite requirement will be deleted from the other Learning Unit.

4 Click the **OK** button.

Managing Content in a Learning Unit

Learning Units may have one course entry added, and it can take the form of an electronic file such as Word, PDF, PowerPoint, a zip file, or a web address. You can add and test the content of the course once it has been uploaded.

In the case of a zip file uploaded as your course content, it will automatically expand, and once expanded the zip file will be deleted. You must have a key file selected as the start/launch point for the content. When the zip file contains multiple files, these files must be linked to the key file or they will not be accessible.

You will have the ability to remove the current content from the Learning Unit; however SCORM/AICC courses do not get this option.

This section describes how to add and maintain non-SCORM content. For more information on SCORM/AICC Learning Units, see *"Importing SCORM/AICC Types of Learning Units" on page 36*

For more information on managing Content, see any of the following:

- *"To Add Content to a Learning Unit" on page 40*
- *"To Remove Content from a Learning Unit" on page 41*

To Add Content to a Learning Unit

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **Title** link of the **Learning Unit** you want to add resources to.

The selected Learning Unit **Details** page displays.

NOTE: Ensure that the **General Info** and then the **Content** tabs are open.

3 Click the **Add** button, and select **File** or **Web Address** from the list.

The **Add File** or **Add Web Address** pop-up opens.

4 To add a **File** click the **Browse** button, select the file, and click the **Open** button.

Only one file or web address may be uploaded and associated with the learning unit.

NOTE: If a zip file is uploaded with multiple files a key file must be selected as the start page launched the user. Any associated files must be linked to the key file or they will not be accessible by the user.

OR To add a **Web Address** enter the URL of the web address in the text field.

The address must start with http://, https:// or ftp://.

5 Click the **Next** button.

The **Course content resource** pop-up opens.

6 Enter a **Title** and **Description** in the appropriate text fields.

You must include a title, and it may be up to 100 characters in length.

The description field can remain empty, and it may be up to 2000 characters in length.

NOTE: You can enter language specific titles or descriptions using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

7 Click the **OK** button.

The new content file or web address details displays.

To Test the Content

8 Click the **Test** button.

The associated application will launch to open the file or a new browser window opens.

To Remove Content from a Learning Unit

1 From the **Learning Unit Details** page, click the **Content** tab.

The **Content** file or url details displays.

2 Click the **Remove** button.

A confirmation pop-up opens.

3 Click the **OK** button to confirm.

Managing Resources in a Learning Unit

Resources are items that can accompany a Learning Unit, such as study guides, directions to the course, tests, and so forth. Learning Units may have one or more resources added, and can take the form of a file resource, including zip files or web address.

You will have the option of making the resource visible to students, or whether the resource is only available to instructors and Learning administrators.

For more information on managing Resources, see any of the following:

- *"To Add Resources to a Learning Unit" on page 42*
- *"To Remove Resources from a Learning Unit" on page 43*
- *"To Reorder Resources in a Learning Unit" on page 43*

To Add Resources to a Learning Unit

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **Title** link of the **Learning Unit** you want to add resources to.

The selected Learning Unit **Details** page displays.

NOTE: Ensure that the **General Info** and then the **Resources** tabs are open.

3 Click the **Add** button, and select **File** or **Web Address** from the list.

The **Add File** or **Add Web Address** pop-up opens.

4 To add a **File** click the **Browse** button, select the file, and click the **Open** button.

Only one file may be uploaded at a time.

NOTE: When zip files are uploaded as resources, they are just stored as zip files, not expanded.

OR To add a **Web Address** enter the URL of the web address in the text field.

The address must start with http://, https:// or ftp://.

5 Click the **Next** button.

The **Referenced resource** pop-up opens.

6 Enter a **Title** and **Description** in the appropriate text fields.

You must include a title, and it may be up to 100 characters in length.

The description field can remain empty, and it may be up to 2000 characters in length.

NOTE: You can enter language specific titles or descriptions using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

7 Select the **Prevent the student from seeing this resource** checkbox if applicable.

When selected the resource is not visible to the student, however it will be visible to instructors and Learning Administrators.

8 Click the **OK** button.

The new resource file or web address details displays.

9 To edit the details of the resource, click the **Title** link.

The **Referenced resource** pop-up opens.

NOTE: You can edit the details of the resource, but you cannot edit the file or address properties.

10 To test the resource, click the **File** or **Web Address** link.

The associated application will launch to open the file or a new browser window opens.

To Remove Resources from a Learning Unit

1 From the **Learning Unit Details** page, click the **Resources** tab.

The **Resource** list displays.

2 Select the check box next to the **Resource(s)** you want to remove.

To select all available check boxes, use the check box to the left of the **Order** column.

3 Click the **Remove** button.

A confirmation pop-up opens.

4 Click the **OK** button to confirm.

To Reorder Resources in a Learning Unit

1 From the **Learning Unit Details** page, click the **Resources** tab.

The **Resource** list displays.

2 Click the **Reorder...** button.

The **Reorder** pop-up opens

3 Select the **resource** and click the **up** or **down** arrows.

Continue to use the arrows until the desired position of resource is obtained.

4 Click the **OK** button.

5 To sort a **resource** list, click the **Column Header** for the column you want to sort.

The sorting arrow indicates the ascending or descending sorting direction.

- Click the same column header again to sort in the opposite direction.

Managing Results Settings for a Learning Unit

With this feature you can specify how results of a learning activity will appear. The default for Results settings will be to have the feature disabled; however you can define the Result settings used for a Learning Unit. There are a variety of display settings in which Results may appear, such as percentage (65%), numeric (7/8), B+, failed or successfully completed.

Scoring settings cannot be changed if students of the Learning Unit have results using existing settings. The actual results/score data will lock the options, and the Learning Unit will continue to use the currently defined display settings. The pass/fail display text, and the default scale can change, but you cannot add or remove overall result models.

For more information on managing Result settings, see the following:

• *"To Activate/Edit Results Setting for a Learning Units" on page 44*

To Activate/Edit Results Setting for a Learning Units

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

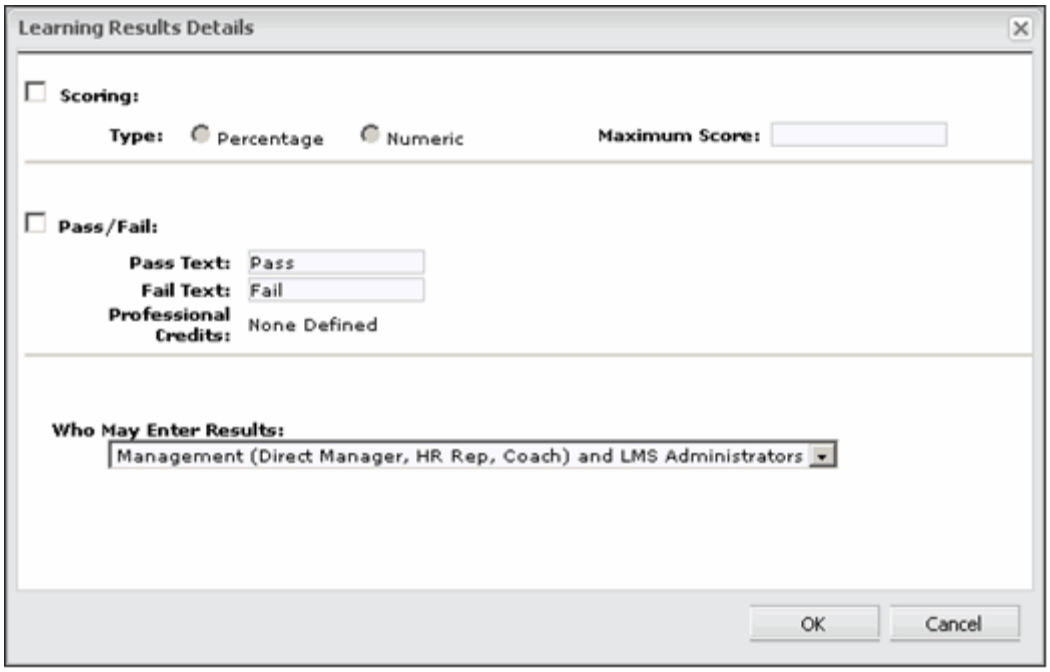
2 Click the **Title** link of the **Learning Unit** you want to add result settings to.

The selected Learning Unit **Details** page displays.

NOTE: Ensure that the **General Info** and then the **Results** tabs are open.

3 Click the **Edit...** button.

The **Learning Results Details** pop-up opens.



4 To enable scoring, select the **Scoring** check box.

The associated radio buttons and fields become active.

5 In the **Type** area, click the **Percentage** or **Numeric** radio button.

When scoring is enabled a selection is mandatory.

6 In the **Maximum Score** area, enter a value in the text field.

If **Numeric** score type is selected you must enter a number from 0 to 999.

NOTE: The field is disabled if scoring is not used, or if scoring is percentage based.

7 To enable the pass/fail indicator, select the **Pass/Fail** check box.

When selected, results will include a pass or fail flag, which can be used to award certifications or track the number of professional credits awarded with the unit.

8 Enter display text in the **Pass** and **Fail** text fields.

Text entered here will be the display text, and may be up to 30 characters in length.

NOTE: For example text for pass may be “Successful” and text for fail “Unsuccessful”.

9 Select from the **Who May Enter Results** drop-down list.

This is a predefined list that is used to determine what who can mark a student’s activity as complete and enter a final score into “Personal/Management” pages.

NOTE: This selection does not affect importing results or the administrator’s ability to enter results manually.

10 Click the **OK** button.

Managing Prerequisites for a Learning Unit

You can specify whether one or more existing Learning Units can be added as prerequisites for the current unit.

This information can then be used to warn when a request for enrollment is made for a student who has not completed prerequisite course(s). However, enrollment will not be stopped, as the prerequisite may have been completed outside the *Halogen eLearning Manager* module.

For more information on managing Prerequisites, see any of the following:

- *“To Add a Prerequisite to Learning Units” on page 45*
- *“To Remove a Prerequisite from a Learning Unit” on page 46*

To Add a Prerequisite to Learning Units

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

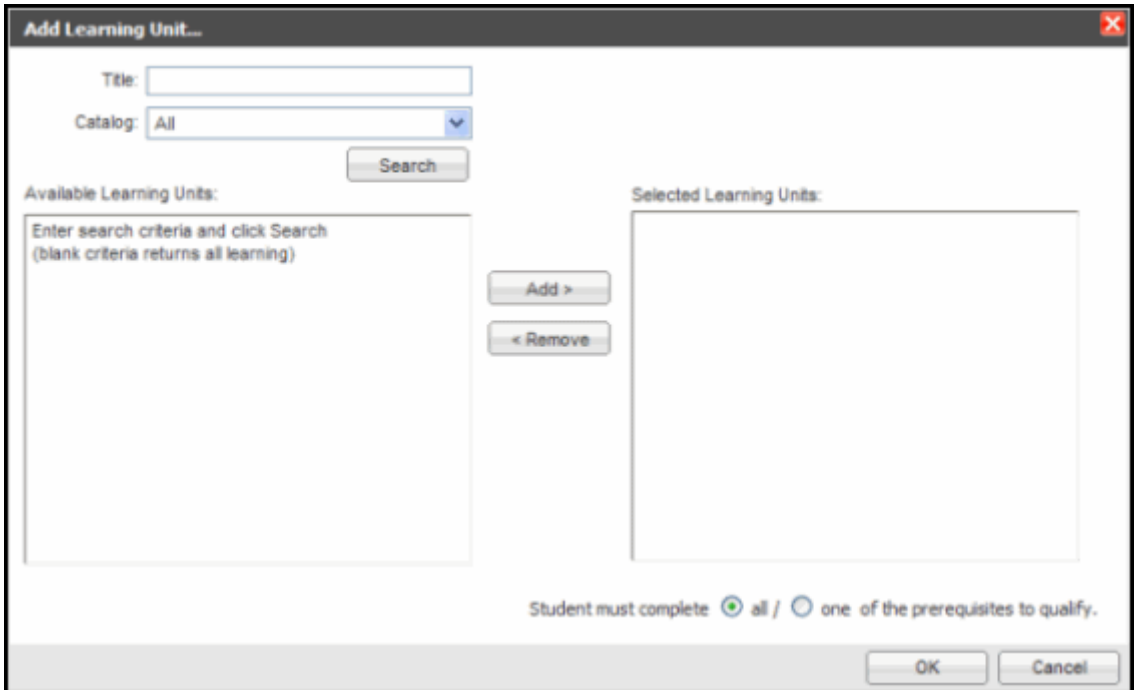
NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **Title** link of the **Learning Unit** you want to add result settings to.

The selected Learning Unit **Details** page displays.

NOTE: Ensure that the **General Info** and then the **Prerequisites** tabs are open.

3 Click the **Add Learning Unit...** button.
The **Add Learning Unit** pop-up opens.



4 Enter the first letter(s) of the title in the **Title** field and click the **Search** button.
The more letters you enter the more precise the search results will be.
• To reset the list, clear the **Title** field and click the **Search** button.
NOTE: Only learning units with a status of final and in final catalogs will appear for selection.

5 To select from a specific catalog, select from the **Catalog** drop-down list.
All learning units available in the selected catalog will display.
NOTE: Select **All Catalogs** from the drop-down list to display all active catalogs.

6 Select a learning unit from the **Available Learning Units** list and click the **Add >** button.
The learning unit title will appear in the **Selected Learning Units** list.
NOTE: You can make multiple selections using the “Shift” and “Ctrl” keys while selecting.

OR Select a learning unit from the **Selected Learning Units** list and click the **< Remove** button.

7 In the **Student must complete** area, click a radio button.
The selection determines whether a student must complete all or one prerequisite to qualify.

8 Click the **OK** button when selection(s) have been made.

To Remove a Prerequisite from a Learning Unit

1 Select the check box next to the **Learning Unit(s)** you want to remove.
To select all available check boxes, use the check box to the left of the **Title** column.

2 Click the **Remove** button.

A confirmation pop-up opens.

3 Click the **OK** button.

NOTE: Selected learning units will disappear from the list, but if learning units has been archived, they will remain a prerequisite.

Viewing Associated Certifications

When a Learning Unit is associated with certifications, you can view the particular certification and its details.

Students who successfully complete the Learning Unit may be entitled to receive the associated certification(s). This information is used to provide reference only and cannot be modified from this page.

Note: If a Certification has a status of "Archived," it will not appear in the list of associated Certifications. Certifications with a status of "Draft" will be visible to administrators, however.

To View Associated Certifications

1 From the **Learning Unit Details** page, click the **Certifications** tab.

The **Certification** area displays in the lower panel.

NOTE: Titles of any certifications associated with the unit are listed.

2 To sort a **Certifications** list, click the **Title** column header.

The sorting arrow indicates the ascending or descending sorting direction.

- Click the same column header again to sort in the opposite direction.

3 Click the **Title** link of the **Certification** you want to view.

The selected **Certification Details** page displays.

Viewing Associated Learning Paths

A learning path is a set of related Learning Units that are grouped together. When a Learning Unit is part of a path, you can view the path and any associated details. This information is used to provide reference only and cannot be modified from this page.

NOTE: If a Learning Path has a status "Archived," it will not appear in the list of associated Learning Paths. Learning Paths with a status of "Draft" will be visible to administrators, however.

To View Associated Learning Paths

1 From the **Learning Unit Details** page, click the **Paths** tab.

The **Learning Paths** area displays in the lower panel.

NOTE: Titles of any learning paths associated with the unit are listed.

2 To sort a **Learning Paths** list, click the **Title** column header.

The sorting arrow indicates the ascending or descending sorting direction.

- Click the same column header again to sort in the opposite direction.

3 Click the **Title** link of the **Learning Path** you want to view.

The selected **Learning Path Details** page displays.

Chapter 4

Certifications

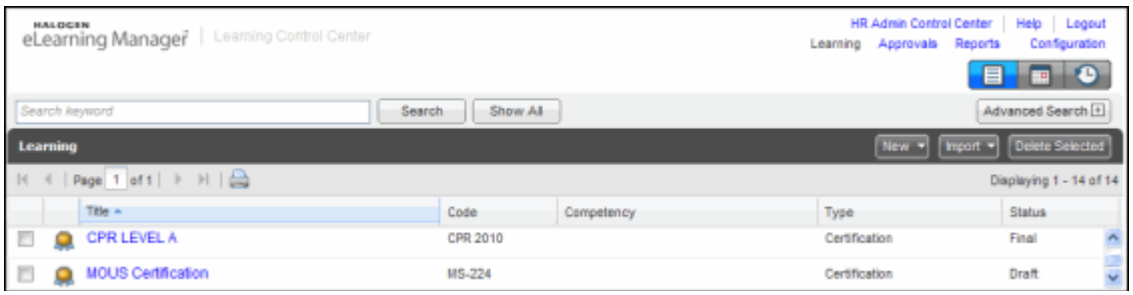
This section describes *Halogen eLearning Manager* Certifications. Certifications are a formal acknowledgement of successful achievement of a defined set of outcomes.

The section topics are as follows:

- *"About Certifications" on page 50*
- *"Creating a Certification" on page 51*
- *"Searching for Certifications" on page 53*
- *"Viewing Certification Details" on page 54*
- *"Editing Certification Details" on page 54*
- *"Deleting Certifications" on page 55*
- *"Archiving a Certification" on page 56*
- *"Awarding Certifications Automatically" on page 56*
- *"Awarding Certifications Manually" on page 59*
- *"Adding Learning Units and Paths to Certifications" on page 61*
- *"Renewing an Employee's Certification" on page 62*
- *"Deleting an Employee's Certification" on page 64*
- *"About Certification Notifications" on page 64*
- *"Configuring Certification Notifications" on page 64*
- *"Printing Certifications" on page 67*

About Certifications

A certification is a formal acknowledgement of successful achievement of a defined set of outcomes. For example, software developers can be certified in various programming languages. An example list of certifications appears below.



You can quickly identify certifications in the list of items (learning units, paths, and certifications) on the main Learning page by the gold medal icon next to them.

Some certifications have expiry dates while others do not. The Learning Control Center system allows you to set notifications for certifications with expiry dates.

In regards to licensing, the system treats licensing in the same way as a certification. For example, licenses such as a CPA, RN, or driver's license are referred to as "certifications" in the *Halogen eLearning Manager* module. Therefore, a license, such as a forklift driver's license, is considered a certification in the system.

Finally, you can also create reports that identify the certification statuses for all of the employees in your organization. For more information, see *"About eLearning Manager Reports" on page 164*.

See any of the following for more information on working with certifications:

- *"About Certifications" on page 50*
- *"Creating a Certification" on page 51*
- *"Searching for Certifications" on page 53*
- *"Viewing Certification Details" on page 54*
- *"Editing Certification Details" on page 54*
- *"Deleting Certifications" on page 55*
- *"Archiving a Certification" on page 56*
- *"Awarding Certifications Automatically" on page 56*
- *"Awarding Certifications Manually" on page 59*
- *"Adding Learning Units and Paths to Certifications" on page 61*
- *"Renewing an Employee's Certification" on page 62*
- *"Deleting an Employee's Certification" on page 64*

- *"About Certification Notifications" on page 64*
- *"Configuring Certification Notifications" on page 64*
- *"Printing Certifications" on page 67*

Creating a Certification

Learning Administrators, Catalog Managers and Super Users can create certifications.

When you create a certification, you must give it a status. Certifications can have a status of "draft," "archived," or "final."

By default, certifications have a status of "draft" when they are created. You cannot award certifications with statuses of "draft" to employees, and employees cannot view draft certifications when they are browsing learning.

Certifications that have a status of "final" can be awarded to employees, and they can view them when they browse learning.

"Archived" certifications are those that are not needed anymore. Archived certifications are not visible to employees.

Turning to certifications and catalogs, if you do not select a catalog for the certification when you create it, the certification is automatically added to the default catalog, but you can add it to other catalogs as well.

To Add a Certification

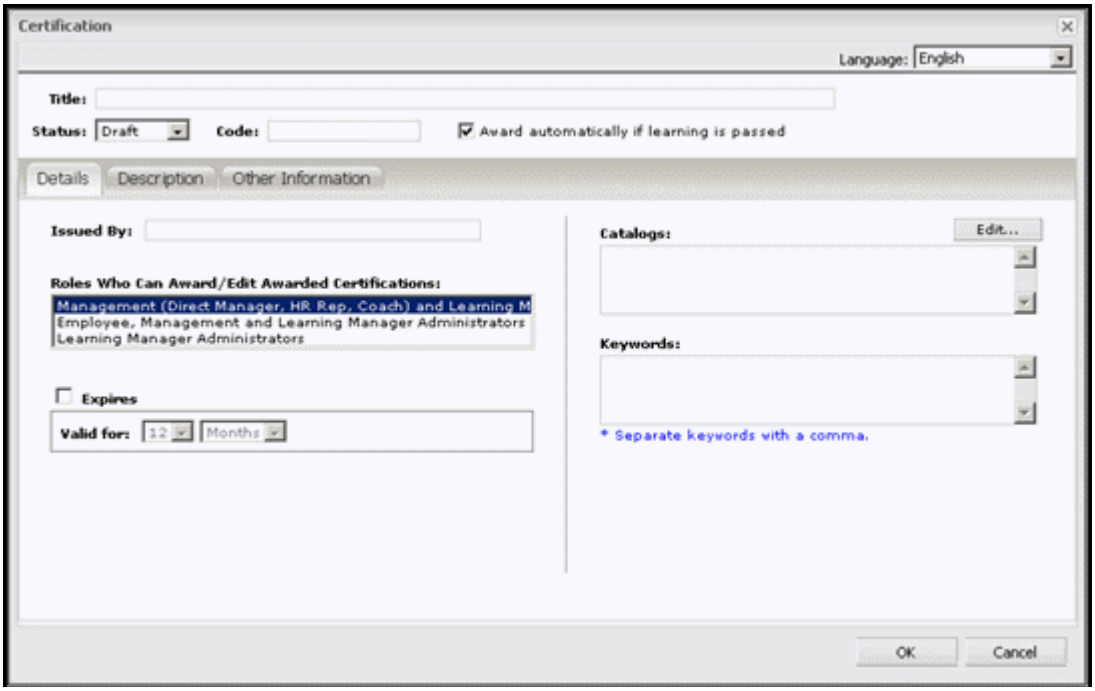
1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **New** button, and then click **Certification...**.

The **Certification** window displays.



3 In the **Title** field, enter a title for the certification.

You must use a unique title for active certifications.

4 In the **Code** field, enter a code for the certification.

You must use a unique code for active certifications.

5 (Optional) Do any of the following:

- In the **Status** drop-down list, select a status. Draft and archived certifications cannot be awarded and users cannot view them.
- In the **Issued By** field, enter the name of the person/organization responsible for issuing the certification.
- In the **Roles Who Can Award/Edit Awarded Certifications** area, select the role that you want to allow to edit the status, issue date, number, or expiry date for the certification. For example, select **Learning Manager Administrators** if you only want administrators to be able to edit those fields.
- If you want the certification to be automatically awarded after the learner completes a learning unit or learning path that fulfills the learning requirements of the certification, select the **Award automatically if learning is passed** check box. For more information, see *"Awarding Certifications Automatically" on page 56*.
- If the certification expires after a period of time, select the **Expires** check box, and then enter the number of months or years the certification is valid for. The value you enter here will be prefilled

in the **Valid for** field when you manually award a certification to an employee. For more information, see *"Awarding Certifications Manually" on page 59*.

- In the **Catalogs** area, click the **Edit...** button if you want to add the certification to a catalog or several catalogs.
- In the **Keywords** area, enter keywords for the certification. These keywords are used to help you search for a certification from the Learning home page.

6 (Optional) Click the **Description** tab, and then enter a description of the certification.

This description will be visible to all learners.

7 (Optional) Click the **Other Information** tab, and then enter any relevant extra information.

For example, you might want to add information on continuing education requirements here.

8 Click the **OK** button.

Searching for Certifications

By default, the "Learning" page displays learning units, learning paths, and certifications. However, you can search for certifications in specific catalogs, by the certification status (draft, archived, or final), by the certification cost, and by region. In addition, you can enter text when you search for certifications, which will be checked against the following fields:

- Title
- Code
- Keyword
- Description
- Competency
- Purpose

To Search For a Certification

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **Advanced Search** button.

3 In the **Type** drop-down list, click **Certification** then click the **Search** button.

A list of certifications displays.

4 (Optional) Do any of the following:

- If there are many certifications and you need to refine your search further, enter some search text in the field, and then click the **Search** button.
- If you want to refine your search even further, make your selections from the check boxes and/or date choosers, and then click the **Search** button.

Viewing Certification Details

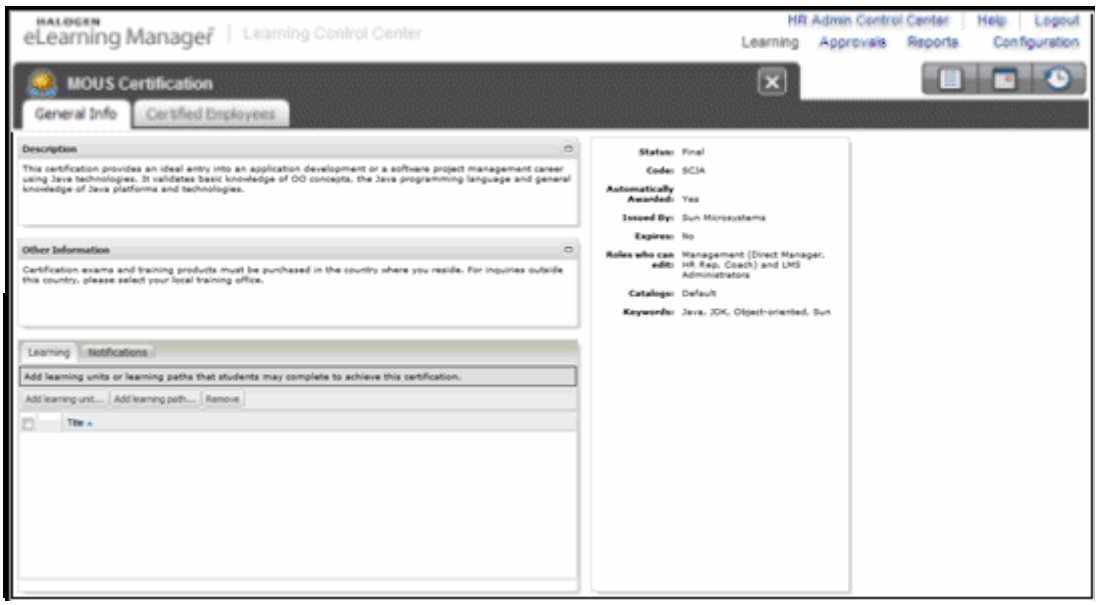
From the Learning page, you can view certification details for individual certifications.

To View Certification Details

1 Locate the certification whose details you want to view. For more information, see *"Searching for Certifications" on page 53*.

2 In the **Title** column, click the link for the certification you want to view.

The certification details display showing a **Description** area, an **Other Information** area, and other details on the right-hand side.



Editing Certification Details

You can edit details of the certification, such as the title, code, keywords, and so forth, at any time. For example, you may want to edit details in the other information area if the location of the certification test changes.

To Edit a Certification

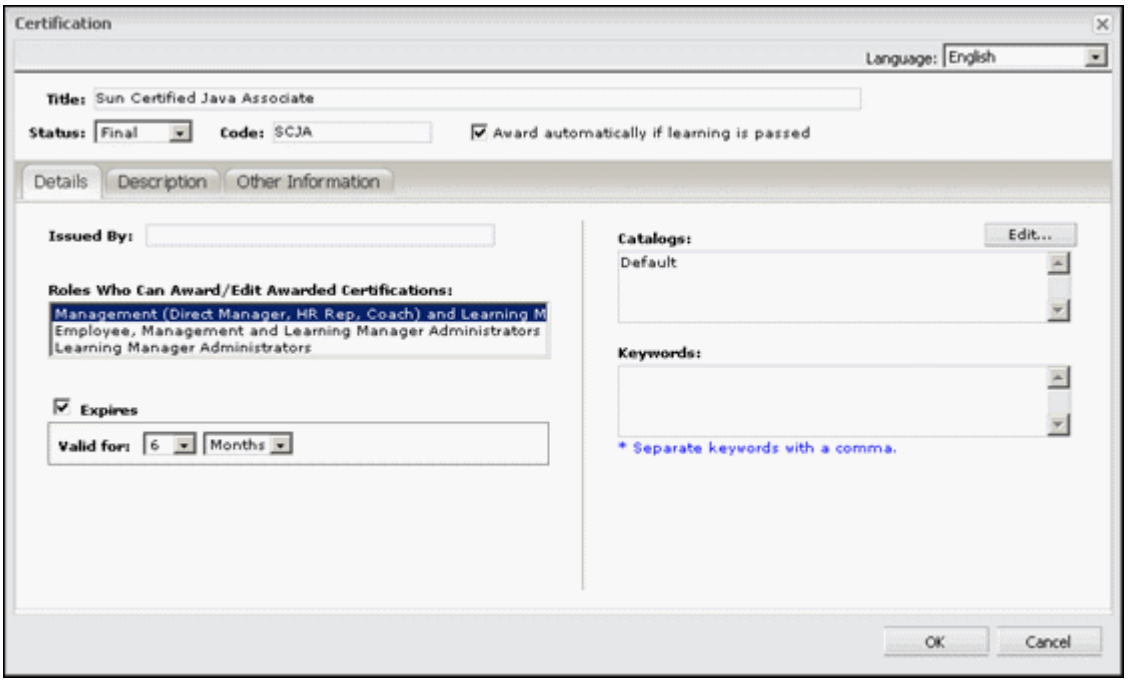
1 Locate the certification you want to edit. For more information, see *"Searching for Certifications" on page 53*.

2 In the **Title** column, click the link for the certification you want to edit.

The **Certification** page displays.

3 Click the **Edit...** button.

The **Certification** window displays showing the details for the certification.



4 Edit the fields as required. For more information on the certification fields, see *"Creating a Certification" on page 51*.

NOTE: The status can only be modified by the roles defined in the **Roles Who Can Award/Edit Awarded Certifications** area.

5 Click the **OK** button.

Deleting Certifications

When you delete a certification, any links to learning units or learning paths are also deleted. In addition, if a certification is linked to an employee, certification data for the employee will also be deleted.

Consider archiving a certification if you do not want links to learning units/paths and employee certification data to be lost. For more information on archiving a certification, see *"Archiving a Certification" on page 56*.

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Select the check box next to the certification you want to delete.

3 Click the **Delete Selected** button.

4 Click the **OK** button to confirm.

Archiving a Certification

Archive a certification if you do not want users to see the certification in catalogs. For example, you may want to archive a certification if it is no longer relevant to new employees, but you do not want to delete all certification records for employees who have already achieved the certification.

If you'd rather delete a certification and all of the employee data associated with it, see *"Deleting Certifications" on page 55*.

To Archive a Certification

1 Locate the certification you want to archive. For more information, see *"Searching for Certifications" on page 53*.

2 In the **Title** column, click the link for the certification you want to archive.

The **Certification** page displays.

3 Click the **Edit...** button.

The **Certification** window displays showing the details for the certification.

4 In the **Status** drop-down list, select **Archived**.

5 Click the **OK** button.

The status of the certification changes to "archived."

Awarding Certifications Automatically

When you create a certification, you have the option to award a certification automatically when an employee successfully completes a learning unit or learning path (see step 5 in *"Creating a Certification" on page 51*.

To award a certification automatically, the learning unit associated with it must use a pass/fail scoring system (see *"Managing Results Settings for a Learning Unit" on page 43* for more information). In addition, if the employee successfully completes one learning unit, the certification will be awarded, regardless of how many learning units are

associated with the certification. For example, suppose you have three learning units associated with the certification and you want to automatically award certifications. If the employee successfully completes the first learning unit, the certification will be awarded automatically.

If you want an employee to complete several learning units before the certification is awarded, associate a learning path to the certification and include the learning units in the learning path. Note that you cannot configure a combination of learning inside the certification itself.

You can always assign learning to the certification that does not use a pass/fail scoring system, but it will not be automatically awarded.

Once the certification has been awarded to an employee, the notification agent will check the status of the certification and send out notifications accordingly. For more information on certification notifications, see *"About Certification Notifications" on page 64*.

If you change the pass/fail results of a learning unit after it has been automatically awarded—for example, setting the results to "Fail" from "Pass"—the employee's certification will not be deleted from their personal pages; instead, you must manually delete certifications that have been automatically awarded. For more information on deleting certifications, see *"Deleting Certifications" on page 55*.

The following procedure assumes you have already created the certification. If you have not yet created the certification, do so now. For more information, see *"Creating a Certification" on page 51*.

To Award Certifications Automatically

1. Locate the certification you want to award to the employee. For more information, see *"Searching for Certifications" on page 53*.
2. In the **Title** column, click the link for the certification you want to automatically award.

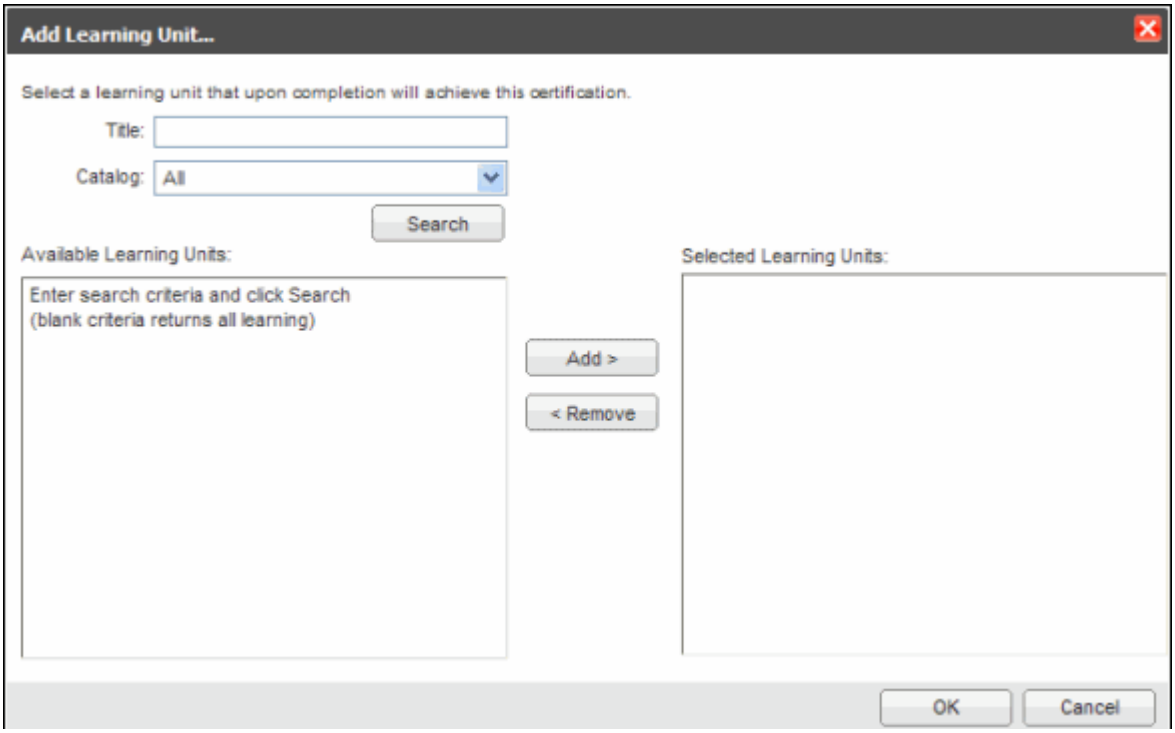
   The **Certification** page displays.
3. Click the **Edit...** button.

   The **Certification** details window displays.
4. Select the **Award automatically if learning is passed** check box, and then click the **OK** button.
5. Click the **Learning** tab.

6 Do either of the following:

- Click the **Add Learning Unit...** button.

The **Add Learning Unit...** window displays.



OR

- Click the **Add Learning Path...** button.

The **Add Learning Path** window displays.

7 (Optional) Enter a title of the learning unit or learning path in the **Title** field, and/or select a catalog in the **Catalog** drop-down list.

8 Click the **Search** button.

The list of learning units (or paths) appears in the **Available Learning Units** area. Only learning units (or paths) with a status of “final” appear in this area. If the learning units (or paths) are in catalogs, those catalogs must also have a status of “final.”

9 Select the learning units or paths, and then click the **Add >** button.

10 Click the **OK** button.

The certification will now be awarded automatically when an employee completes the learning unit or path, and the name of the learning unit or path will appear in the “Awarded by” area of the certification.

NOTE: If you remove learning from a certification, completed certifications will not be affected. However, incomplete or future certifications will be affected.

Awarding Certifications Manually

Although you can configure the system to automatically award certifications when a learning unit or learning path is successfully completed (see *"Awarding Certifications Automatically" on page 56*), you can also award certifications to employees manually. Consider awarding certifications manually if you want to review the learning more closely before awarding the certification to the employee.

Once you have awarded the certification to an employee, the notification agent will check the status of the certification and send out notifications accordingly. For more information on certification notifications, see *"About Certification Notifications" on page 64*.

To Award a Certification to an Employee

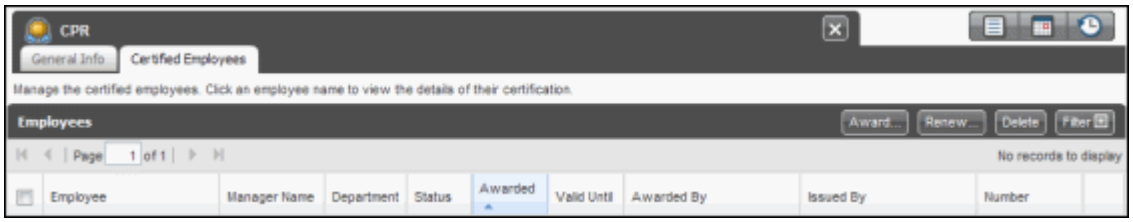
1. Locate the certification you want to award to the employee. For more information, see *"Searching for Certifications" on page 53*.

2. In the **Title** column, click the link for the certification you want to award.

   The **Certification** page displays.

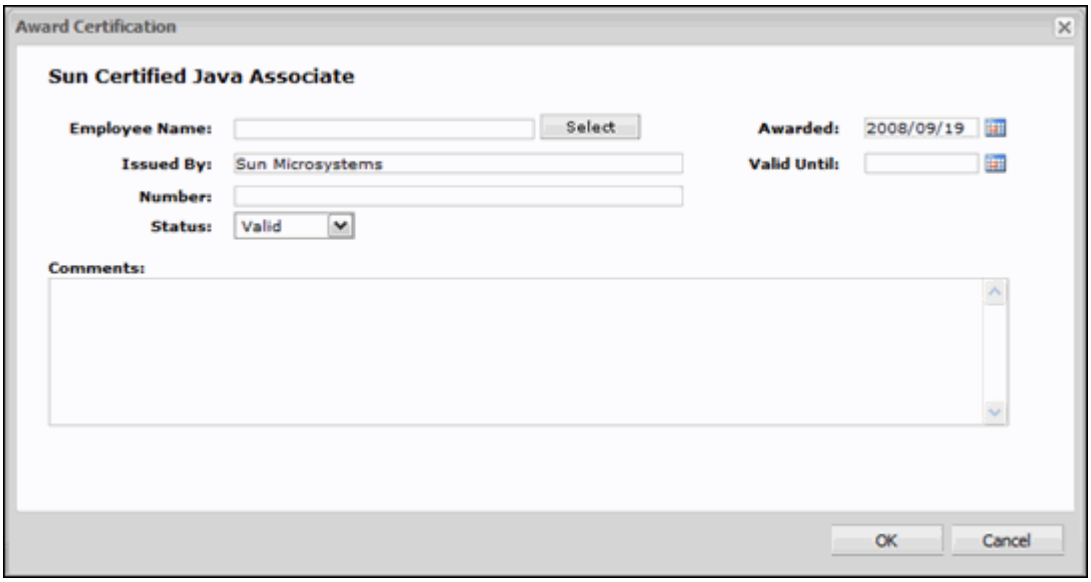
3. Click the **Certified Employees** tab.

   A list of employees currently associated with the certification you selected in step 2 appears. If no employees are currently certified, the list will be empty.



4 Click the **Award...** button.

The **Award Certification** window displays.



5 In the **Employee Name** field, click the **Select** button.

The **Select Employee** window displays.

6 Enter the last and/or first name in the corresponding fields, and then click the **Search** button.

A list of employees matching your search appears.

7 (Optional) Select either **Department** or **Email Address** from the **Show additional information** drop-down list if you need more employee information displayed.

8 Select the employee, and then click the **OK** button.

9 (Optional) Do any of the following:

- In the **Issued By** field, enter the name of the company/authority that is issuing the certification.
- In the **Number** field, enter the license number or registration number of the certification.
- In the **Status** drop-down list, select **Valid**.
- Click the **Awarded** icon to select a date.
- If the certification expires, click the **Valid Until** icon to select an expiry date.
- Enter any comments in the **Comments** field.

10 Click the **OK** button.

The certification has now been awarded to the employee, and your username will appear in the “Awarded by” area of the certification.

Adding Learning Units and Paths to Certifications

If you are not automatically awarding certifications (see *"Awarding Certifications Automatically" on page 56*), you can still associate a learning unit or path with the certification. This association can be used for informational purposes only.

To Add Learning Units and Paths to Certifications

1. Locate the certification you want to add Learning Units or Learning Paths to. For more information, see *"Searching for Certifications" on page 53*.

2. In the **Title** column, click the link for the certification to which you want to add learning units or paths.

   The **Certification** page displays.

3. Click the **Learning** tab.

4. Do either of the following:

   • Click the **Add Learning Unit...** button.

   The **Add Learning Unit...** window displays.

OR

   • Click the **Add Learning Path...** button.

   The **Add Learning Path...** window displays.

5. (Optional) In the **Title** field, enter the title of the learning unit or path (if you know it).

6. (Optional) Use the **Catalog** drop-down list to select the specific catalog that contains the learning unit or path.

7. Click the **Search** button.

   The list of learning units or paths appears in the **Available Learning Units** field.

8. Select the unit(s) or path(s), and then click the **Add >** button.

9. Click the **OK** button.

   The learning units or paths appear in the list.

   Tip: To remove learning units or paths from the certification, select the check box(es) next to the learning units and/or path(s), then click the **< Remove** button, and then click the **OK** button to confirm.

Renewing an Employee's Certification

If you need to renew a certification for an employee, you can do so at any time. Consider renewing an employee's certification if the employee completes certification requirements before his/her current certification expires. After you have renewed a certification, the **History** area of the certification is updated to reflect the change. Note that you can only renew one employee's certification at a time.

To Renew an Employee's Certification

1. Locate the certification you want to renew. For more information, see *"Searching for Certifications" on page 53*.

2. In the **Title** column, click the link for the certification you want to renew.

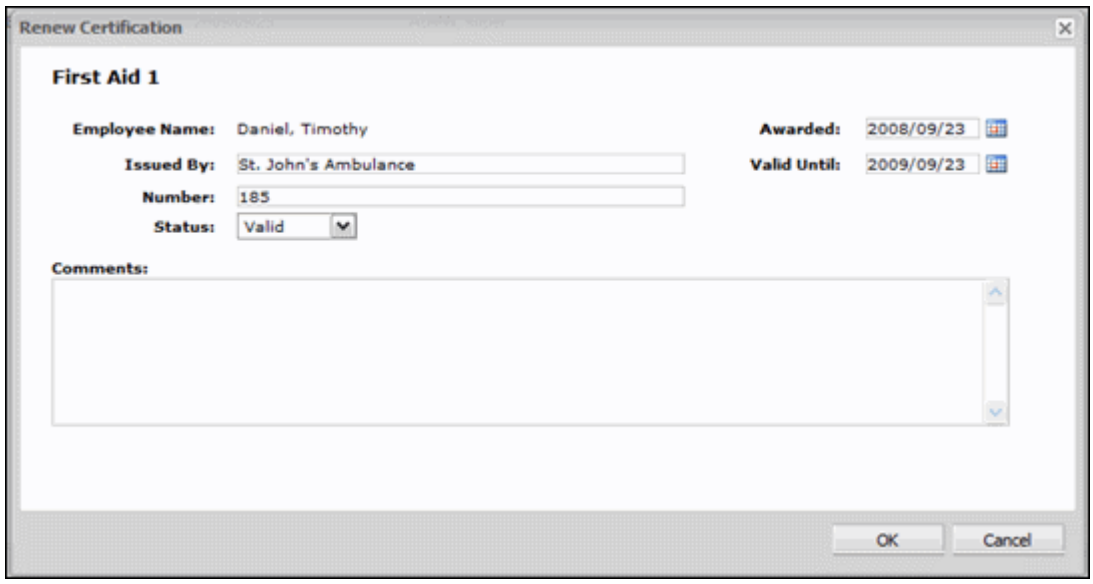
   The **Certification** page displays.

3. Click the **Certified Employees** tab.

   A list of employees currently associated with the certification you selected in step 2 appears.

4. Select the check box next to the employee whose certification you want to renew, and then click the **Renew...** button.

   The **Renew Certification** window displays.



5. (Optional) Edit any of the fields as required.

6. Click the **OK** button.

   The certification history is updated. For more information on the employee certification history, see *"Editing An Employee's Awarded Certification" on page 63*.

Editing An Employee's Awarded Certification

You can edit an employee's certification at any time. For example, you can edit the certification to add comments.

To Edit an Employee's Awarded Certification

1 Locate the certification you want to edit. For more information, see *"Searching for Certifications" on page 53*.

2 In the **Title** column, click the link for the certification you want to edit.

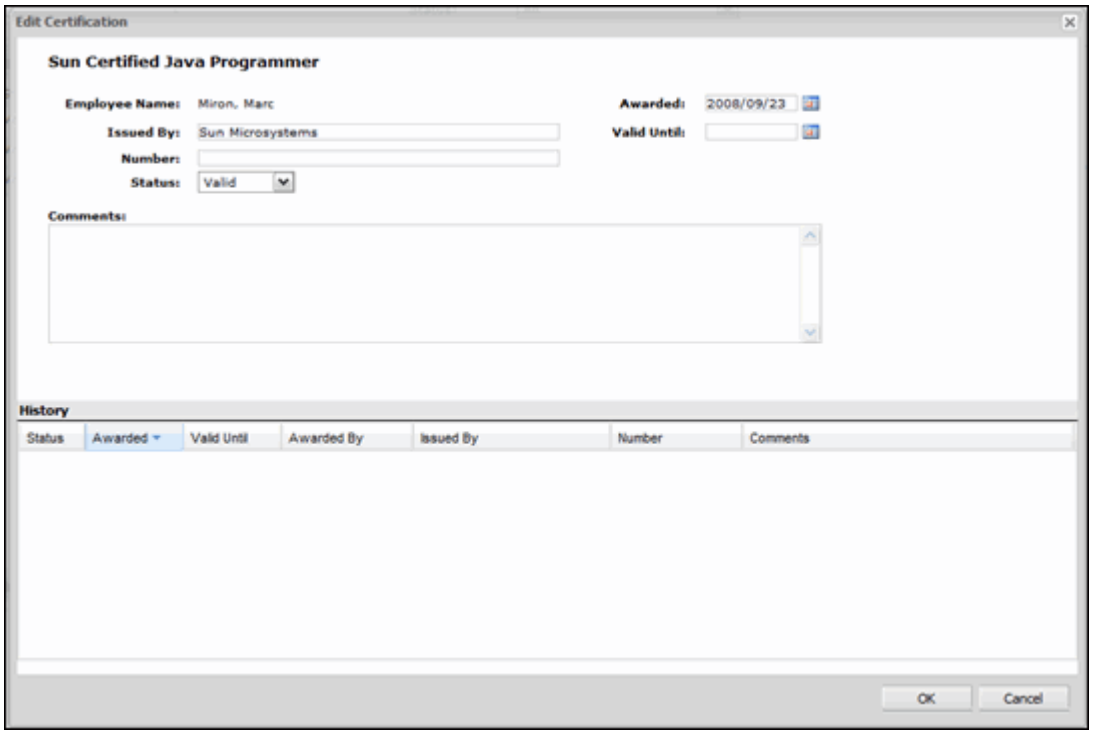
The **Certification** page displays.

3 Click the **Certified Employees** tab.

A list of employees currently associated with the certification you selected in step 2 appears.

4 Click the employee name link.

The **Certification Details** window displays for the employee you selected.



5 Edit the certification details for the employee as required.

6 Click the **OK** button.

Deleting an Employee's Certification

You can delete an employee's certification at any time. When you delete a certification for an employee, the employee will not appear in the certification report.

To Delete an Employee's Certification

1. Locate the employee's certification that you want to delete. For more information, see *"Searching for Certifications" on page 53*.
2. In the **Title** column, click the link for the certification.

   The **Certification** page displays.
3. Click the **Certified Employees** tab.

   A list of employees currently associated with the certification appears.
4. Select the check box(es) next to the employee(s) whose certification(s) you want to delete.
5. Click the **Delete** button, and then click the **OK** button to confirm.

About Certification Notifications

There are two types of certification notifications:

- notifications sent out before certifications have expired
- notifications sent out after certifications have expired

You can configure each of these independently. For example, you might want to configure an impending expiry so the learner receives notifications every week 8 weeks before the certification expires. Once the certification expires, you may want to configure notifications so that the learner only receives notifications once every four months.

For information on configuring certification notification policies, such as the wording of the notification messages, whom they are sent to, and so forth, see *"eLearning Manager Notifications" on page 143*.

Configuring Certification Notifications

You can configure email notifications for certifications that are about to expire and for those that have already expired. The notification system is very flexible. For example, depending on your preferences, you can configure the certification notifications so that users receive emails starting at various weekly, monthly and/or daily intervals.

To Configure the Sending of Certification Expiry Notifications

1 Locate the certification whose expiry notifications you want to configure. For more information, see *"Searching for Certifications" on page 53*.

2 In the **Title** column, click the link for the certification you want to configure.

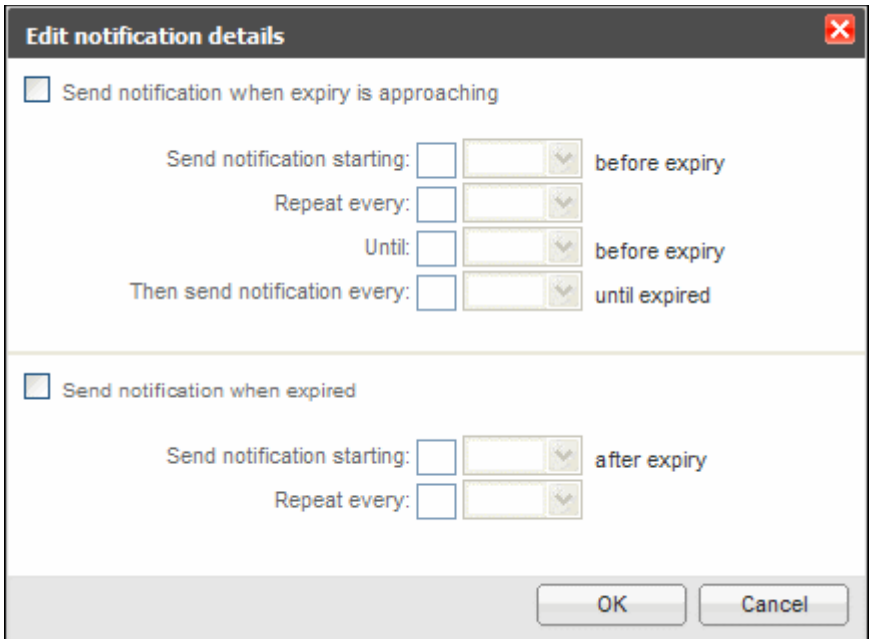
The **Certification** page displays.

3 Click the **Notifications** tab.

The notification information displays.

4 Click the **Edit...** button below the **Notifications** tab.

The **Edit notification details** window displays.



5 Do either or both of the following:

To	Do this
send notification emails before the certification expires	Select the **Send notification when expiry is approaching** check box, and then configure the associated fields and drop-down lists as required. For example, suppose you want to start sending weekly notifications 12 weeks before the certification has expired. Then, in the final week before the certification expires, you want to send a notification every day. To do this, enter **12** in the **Send notification starting** field, and then select **weeks** from the drop-down list. Then enter **1** in the **Repeat every** field, and then select **weeks** from the drop-down list. Then enter **1** in the **Until** field, and then select **weeks** from the **before expiry** drop-down list. Finally, enter **1** in the **Then send notification every** field, and then select **days** from the **until expired** drop-down list.
send notification emails after certification has expired	Select the **Send notification when expired** check box, and then configure the associated fields and drop-down lists as required. For example, suppose you want to send a notification email indicating that the certification has expired the day after it has expired, and then you want notifications to be sent every 2 weeks after the expiry date. To do this, enter **1** in the **Send notification starting** field, and then select **days** from the **after expiry** drop-down list. Then enter **2** in the **Repeat every** field, and then select **weeks** from the drop-down list.

6 Click the **OK** button.

Printing Certifications

You can print certifications so your employees can display them. An example of a certification for printing appears below:

You can also add your own company logo to the printed certificate to customize it further. For more information on adding your own logo to the printed certificate, see the *User Center and Options Guide*.

To Print a Certification

1. Locate the certification you want to print. For more information, see *"Searching for Certifications" on page 53*.
2. In the **Title** column, click the link for the certification you want to print.

   The **Certification** page displays.
3. Click the **Certified Employees** tab.

   A list of employees currently associated with the certification appears.
4. Click the **Print** button in the appropriate employee's row.

   The certificate appears in a new browser window.
5. Use your browser's print feature to print the certificate.

Chapter 5

Learning Paths

Chapter Scope

This section introduces *Halogen eLearning Manager* Learning Paths. A Learning Path is a set of related learning units that are grouped together. You can create, view, edit, and delete Learning Paths. Once a path has been created and learning units have been added, you can then enroll students into the Learning Path.

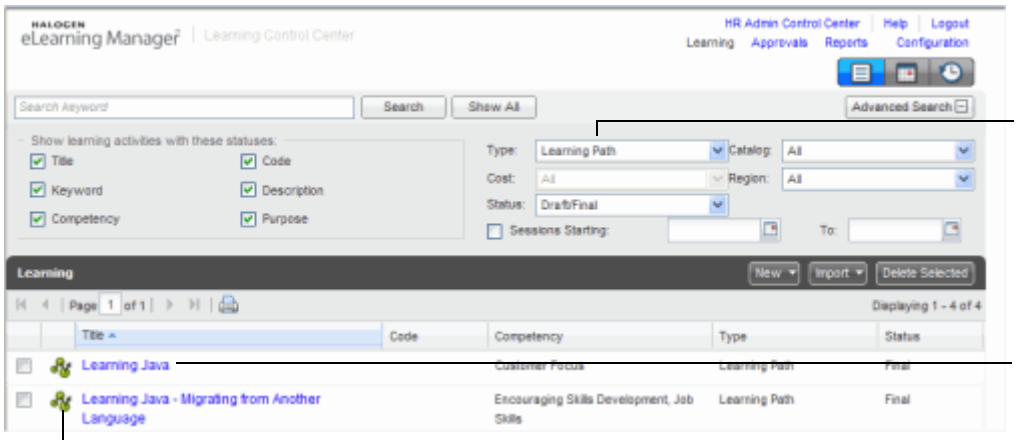
The section topics are as follows:

- *"About Learning Paths" on page 70*
- *"Creating Learning Paths" on page 71*
- *"Editing Learning Paths" on page 73*
- *"Changing the Status of a Learning Path" on page 75*
- *"Deleting Learning Paths" on page 75*
- *"Adding Learning Units to a Learning Path" on page 76*
- *"Adding Students to a Learning Path" on page 78*
- *"Viewing Associated Certifications" on page 82*

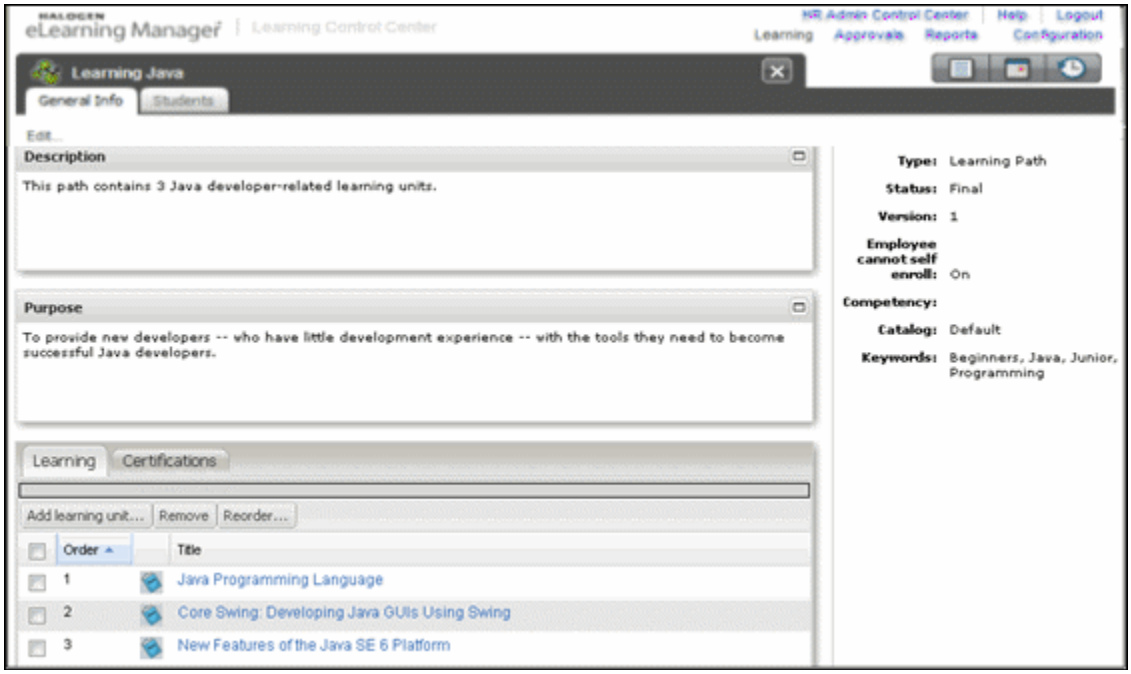
About Learning Paths

A Learning Path is a collection of related learning units that are grouped together. In order for a Learning Path to be available for enrollment, a path must contain at least one learning unit, and would normally have more than one learning unit. Learning Administrators, Catalog Managers and Super Users can create the details of a new Learning Path.

Learning Paths can be accessed and are maintained in learning catalogs. You can use the "Type" filter to display only Learning Paths.



Launching the Learning Path title link produces the Learning Path Details page.



From the Learning Path Details page you can view and manage many aspects of the path, such as altering the status, assignment into catalogs, edit descriptive text, and the adding/deleting/reordering of learning units. The vertical panel to the right provides a snapshot view of some of the details of the Learning Path.

For more information on working with Learning Paths, see any of the following:

- *"Creating Learning Paths" on page 71*
- *"Editing Learning Paths" on page 73*
- *"Changing the Status of a Learning Path" on page 75*
- *"Deleting Learning Paths" on page 75*
- *"Adding Learning Units to a Learning Path" on page 76*
- *"Adding Students to a Learning Path" on page 78*

Creating Learning Paths

Learning Administrators, Catalog Managers and Super Users can create the details of a new Learning Path. A Learning Path is a set of related learning units that are grouped together. In order to be available for enrollment, a Learning Path must contain at least one learning unit; typically a path would have more than one learning unit and the path must have a status of "Final".

New Learning Paths will automatically be listed in the default catalog, but can be removed from the default catalog in addition to being added to other catalogs.

The ability to allow employee self-enrollment is not one of the attributes of the Learning Path. All learning units in a Learning Path must allow self-enrollment to be permitted, and when any learning unit does not allow self-enrollment then it is not permitted.

To Create a New Learning Path

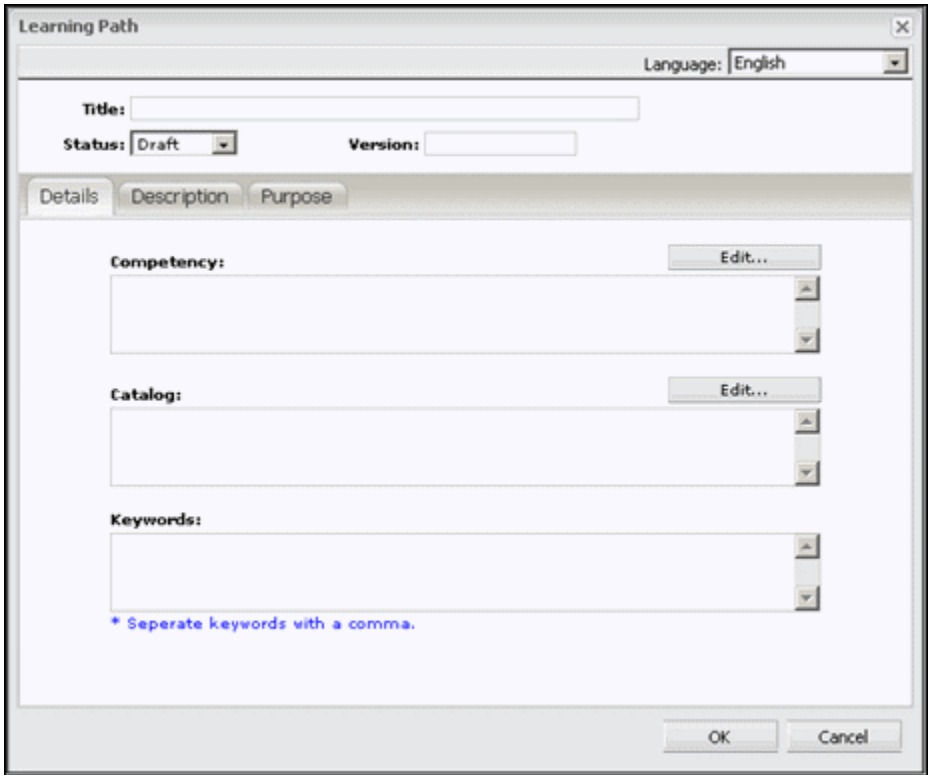
1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **New** button, and select **Learning Path...** from the list.

The **Learning Path** pop-up opens.



3 In the **Title** field, enter a title for the learning path. (This is a mandatory property)

Learning path titles can be up to 1000 characters in length.

NOTE: You can enter language specific titles using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

4 Select **Draft**, **Archived**, or **Final** from the **Status** drop-down list.

These statuses are used to control the visibility of the paths, and the default is the **Draft** status.

- The **Draft**, and **Archived** paths can be accessed by administrators.

5 In the **Version** field, enter a version identifier for the learning path.

Version text is not mandatory, but can assist in keeping track of versions of the learning path.

- Version identifiers can be up to 50 characters in length.

6 To add a competency to the learning path, click the **Edit...** button in the **Competency** area.

The **Competency Selection** pop-up opens.

- Select from the **Available Competencies** list and click the **Add >** button, then click **OK** when complete.

NOTE: A learning path initially has no associated competency, but can be associated to one or many competencies.

7 To add the learning path to a catalog, click the **Edit...** button in the **Catalog** area.

The **Catalog Selection** pop-up opens.

- Select from the **Available** list and click the **Add >** button, then click **OK** when complete.

NOTE: Learning Paths will automatically be added to the Default catalog, or can be assigned to one or more catalogs by a catalog manager.

8 To add keywords associated with the learning path, enter text in the **Keywords** field.

Keywords can assist when searching for specific learning paths.

- Each keyword can be up to 100 characters in length.

NOTE: There is no limit for keyword used, but each keyword must be separated by a comma.

9 To enter a description, click the **Description** tab, and enter text in the **Description** text field.

You can enter up to 100,000 characters of descriptive text.

NOTE: You can enter language specific descriptions using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

10 To enter a purpose, click the **Purpose** tab, and enter text in the **Purpose** text field.

This can be used to describe the education objectives, and can be up to 2000 characters in length.

NOTE: You can enter language specific purposes using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

11 Click the **OK** button.

The **Learning** Path Details page displays.

Editing Learning Paths

Learning Administrators, Catalog Managers and Super Users can edit details of a Learning Path. You can edit the title, status, version, associated competencies, catalogs and keywords, as well as path description and purpose text.

The ability to edit employee self-enrollment is not one of the editable attributes of the Learning Path. All learning units in a Learning Path must allow self-enrollment to be permitted, and when any learning unit does not allow self-enrollment then it is not permitted.

To Edit a Learning Path

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **Title** link of the **Learning Path** you want to edit.

The selected Learning Path **Details** page displays.

3 Click the **Edit...** button.

The **Learning Path** pop-up opens.

4 Edit the **Title** field as required. (This is a mandatory property)

Learning path titles can be up to 1000 characters in length.

NOTE: You can enter language specific titles using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

5 Edit the status by selecting **Draft**, **Archived**, or **Final** from the **Status** drop-down list.

These statuses are used to control the visibility of the paths, and the default is the **Draft** status.

- The **Draft**, and **Archived** paths can be accessed by assigned administrators and cannot be viewed by students.

NOTE: Change the status to **Draft** when making changes to learning units. This prevents the path from appearing in catalogs as changes are being made.

6 Edit the **Version** field as required.

Version text is not mandatory, but can assist in keeping track of versions of the learning path.

- Version identifiers can be up to 50 characters in length.

7 To edit competencies, click the **Edit...** button in the **Competency** area.

The **Competency Selection** pop-up opens.

- Select from the **Available Competencies** list and click the **Add >** button, then click **OK** when complete.

NOTE: A learning path initially has no associated competency, but can be associated to one or many competencies.

8 To edit catalog selection, click the **Edit...** button in the **Catalog** area.

The **Catalog Selection** pop-up opens.

- Select from the **Available** list and click the **Add >** button, then click **OK** when complete.

NOTE: A learning path can be part of one or many catalogs.

9 To edit keywords associated with the learning path, enter text in the **Keywords** field.

Keywords can assist when searching for specific learning paths.

- Each keyword can be up to 100 characters in length.

NOTE: There is no limit for keyword used, but each keyword must be separated by a comma.

10 To edit the description, click the **Description** tab.

You can enter up to 100,000 characters of descriptive text.

NOTE: You can enter language specific descriptions using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

11 To edit the purpose, click the **Purpose** tab.

This can be used to describe the education objectives, and can be up to 2000 characters in length.

NOTE: You can enter language specific purposes using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

12 Click the **OK** button.

Changing the Status of a Learning Path

When you first create a Learning Path it will have the default status of "Draft".

The status of "Final" is similar to a process being opened and will appear in catalog views and be made available for student viewing.

If a Learning Path becomes obsolete or you no longer want employees to enroll in the path the solution may be to archive the Learning Path. Learning Paths with the status of "Archived" can be viewed by administrators when they choose the "archived" status filter.

NOTE: You cannot change the status of a Learning Path if the Learning Path is included in a Certification.

To Change the Status of a Learning Path

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **Title** link of the **Learning Path** you want to edit.

The selected Learning Path **Details** page displays.

3 Click the **Edit...** button.

The **Learning Path** pop-up opens.

4 Edit the status by selecting **Draft**, **Archived**, or **Final** from the **Status** drop-down list.

These statuses are used to control the visibility of the path, and the default is the **Draft** status.

- The **Draft**, and **Archived** paths can be accessed by assigned administrators and cannot be viewed by students.

NOTE: Change the status to **Draft** when making changes to learning units. This prevents the path from appearing in catalogs as changes are being made.

5 Click the **OK** button.

Deleting Learning Paths

The Learning Administrator, Catalog Managers or Super Users can maintain Learning Paths by deleting any unused paths, one at a time. You cannot delete a Learning Path that has students.

To Delete a Learning Path

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Select the check box next to the **Learning Path** you want to delete.

Check boxes are located to the left of the **Title** column, and can only be selected one at a time.

3 Click the **Delete Selected** button.

A confirmation pop-up opens.

NOTE: You will be warned when deleting a path that has students and you will not be able to delete the Learning Path.

4 Click the **OK** button to confirm.

Adding Learning Units to a Learning Path

A Learning Path is a set of related learning units. You can select the learning units that are to be part of the path, and while sequencing of the units is not mandatory they will be controlled by using prerequisites. Learning units can be added, reordered and removed from a Learning Path.

While making changes to learning units associated with a Learning Path, you may want to change the status of the path to “Draft”. This prevents the path from appearing in catalogs as changes are being made; once complete change the path status to “Final”. Changing the learning units will not affect existing students of the path, but changes will affect future students of the Learning Path.

By default learning units are ordered the way each unit was added to the path. This order is a visual order and does not automatically set prerequisite conditions. The order of learning units can be changed by using the Reorder button.

You will also be able to view, but not manage, any certifications associated with the Learning Path.

For more information on managing Learning Units, see any of the following:

- *“To Add a Learning Unit to a Path” on page 77*
- *“To Remove a Learning Unit from a Path” on page 78*
- *“To Reorder Learning Units in a Path” on page 78*
- *“To View Associated Certifications” on page 78*

To Add a Learning Unit to a Path

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

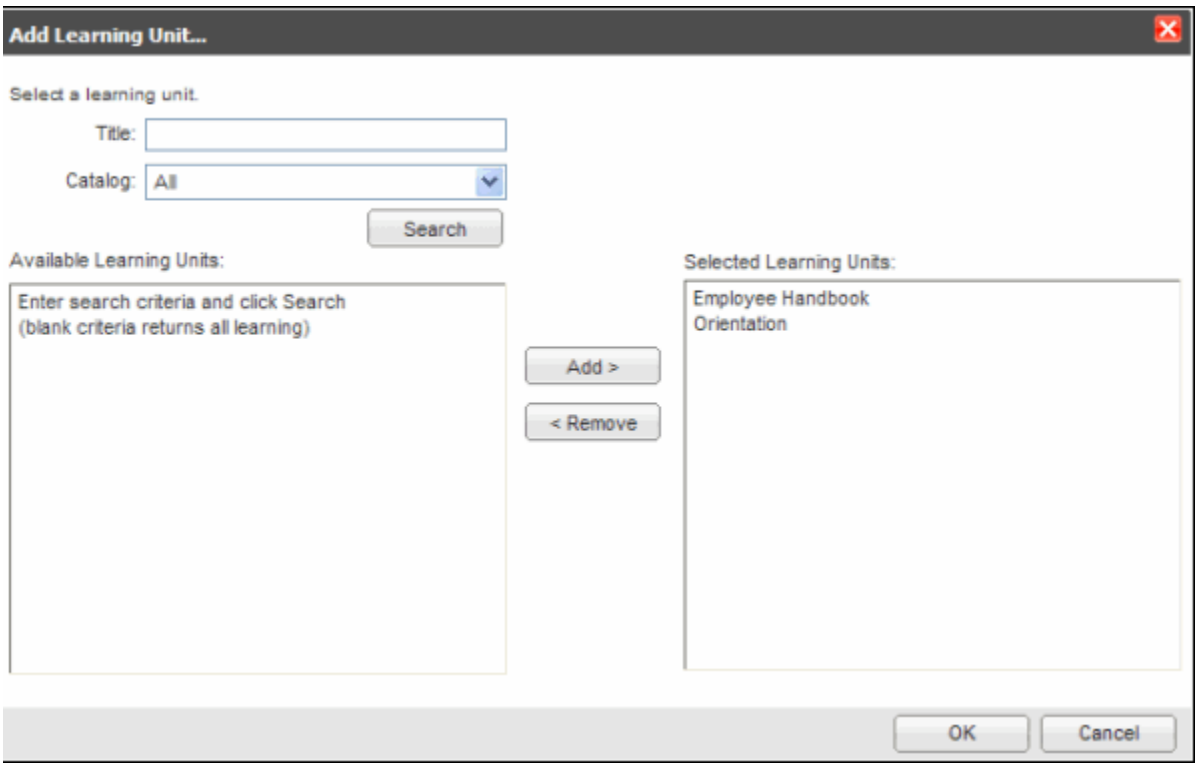
2 Click the **Title** link of the **Learning Path** you want to add learning units to.

The selected Learning Path **Details** page displays.

NOTE: Ensure that the **General Info** and then the **Learning** tabs are open.

3 Click the **Add Learning Unit...** button.

The **Add Learning Unit...** pop-up opens.



4 Enter the first letter(s) of the title in the **Title** field and click the **Search** button.

- The more letters you enter the more precise the search results will be.

NOTE: To reset the list, clear the **Title** field and click the **Search** button.

NOTE: Only learning units with a status of final and in final catalogs will appear for selection.

5 To select from a specific catalog, select from the **Catalog** drop-down list.

All learning units available in the selected catalog will display.

NOTE: Select **All** from the drop-down list to display all active catalogs.

6 Select a learning unit from the **Available Learning Units** list and click the **Add >** button.
The learning unit title will appear in the **Selected Learning Units** list.
NOTE: You can make multiple selections using the “Shift” or “Ctrl” keys while selecting.

OR Select a learning unit from the **Selected Learning Units** list and click the **< Remove** button.

7 Click the **OK** button when selection(s) have been made.

To Remove a Learning Unit from a Path

1 Select the check box next to the **Learning Unit(s)** you want to remove.
To select all available check boxes, use the check box to the left of the **Order** column.

2 Click the **< Remove** button.
A confirmation pop-up opens.

3 Click the **OK** button to confirm.

To Reorder Learning Units in a Path

1 Click the **Reorder...** button.
The **Reorder** pop-up opens

2 Select the **learning unit** and click the **up** or **down** arrows.
Continue to use the arrows until the desired position of learning unit is obtained.

3 Click the **OK** button.

To View Associated Certifications

1 Click the **Certifications** tab.
The **Certification** area displays in the lower panel.
NOTE: Titles of any certifications associated with the path are listed.

2 To sort a **Certifications** list, click the **Title** column header.
The sorting arrow indicates the ascending or descending sorting direction.
- Click the same column header again to sort in the opposite direction.

3 Click the **Title** link of the **Certification** you want to view.
The selected **Certification Details** page displays.

Adding Students to a Learning Path

Employees can be enrolled into a Learning Path, and when this occurs the student will receive a learning activity for each item in the path.

There are a variety of methods in which a student can be enrolled into a Learning Path:

- Management - can enroll their direct report/coached employees/representees
- Employees - can enroll when all learning units in the path permit self-enrollment
- Administrators - can enroll from the Learning Paths Details view, using the "Students" tab

Regardless of who enrolled the student, validation and enrollment into a path will add the employee to the student list for the Learning Path and student list for all learning units in the path. If a unit has sessions, then the student will not be added to a session but will be added with the status of Requiring Session Selection.

If the enrollment was initiated outside of an existing development plan, then there will be a new development plan created for the employee. The title of the Learning Path will be used as the development plan title and a learning activity for each learning unit will be in the development plan.

The Learning Administrator, Catalog Managers or Super Users can access the student list from the Learning Path Details view and selecting the "Students" tab. From the student list, clicking on a student name will open the "Learning Path Activities" pop-up, which will summarize the state of activities for that student.

For more information on enrollment and Learning Path activities, see any of the following:

- *"To Add a Student to a Learning Path" on page 79*
- *"To View Learning Path Activities" on page 81*
- *"To Delete a Student from a Learning Path" on page 81*

To Add a Student to a Learning Path

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **Title** link of the **Learning Path** you want to access.

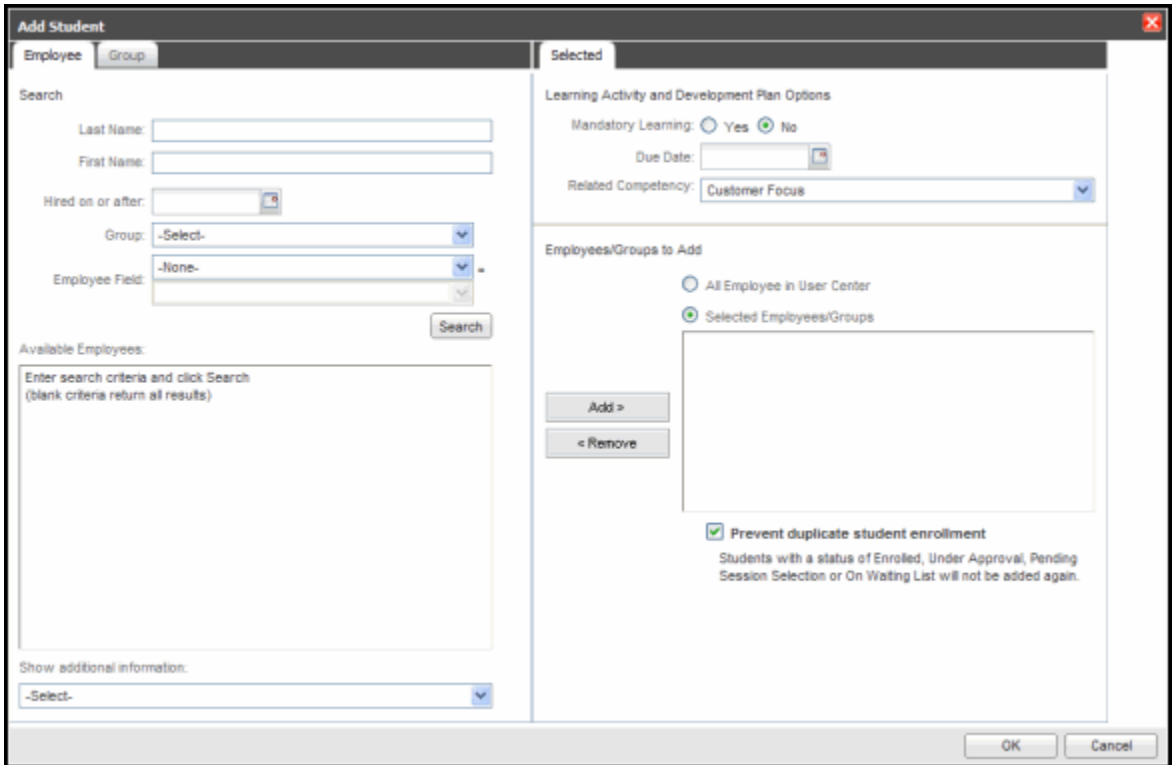
The selected Learning Path **Details** page displays.

3 Click the **Students** tab.

The **Students** details page displays.

4 Click the **Add...** button.

The **Add Student** pop-up opens.



5 In the employee **Search** area, enter the first letter(s) in the **Last** or **First Name** fields and click the **Search** button.

- The more letters you enter the more precise the search results will be.

NOTE: To reset the list, clear the **Name** fields and click the **Search** button.

TIP: If there are employees with similar name in your organization, use the **Show Additional Information** drop-down list to select filtering criteria.

6 To select by hire date, click the **Calendar** icon and select a date.

The **Select Date** pop-up opens.

7 To select from a **Group** or **Employee Field**, select from the drop-down lists and click the **Search** button.

All employees matching filter criteria will display.

NOTE: To reset the list, set the fields to -Select- or -None- and click the **Search** button.

8 Select names from the **Available Employee** list and click the **Add >** button.

The employee names will appear in the **Employees/Group to Add** list.

NOTE: You can make multiple selections using the “Shift” or “Ctrl” keys while selecting employees.

NOTE: You can also click the **Group** tab and select a group name and click the **Add** button.

OR Select a name from the **Employees/Group to Add** list and click the **< Remove** button.

9 In the **Learning Activity and Development Plan Options** area do any of the following:

- To designate the learning item as **Mandatory Learning**, click the **Yes** button.
- To select a **Due Date**, click the **Calendar** icon.
- To select a **competency**, select from the **Related Competency** drop-down list.

10 In the **Employees/Groups to Add** area, select a radio button.

.Select the **All Employees in User Center** radio button to add all employees

OR Select the **Selected Employees/Group** radio button to add the current list only

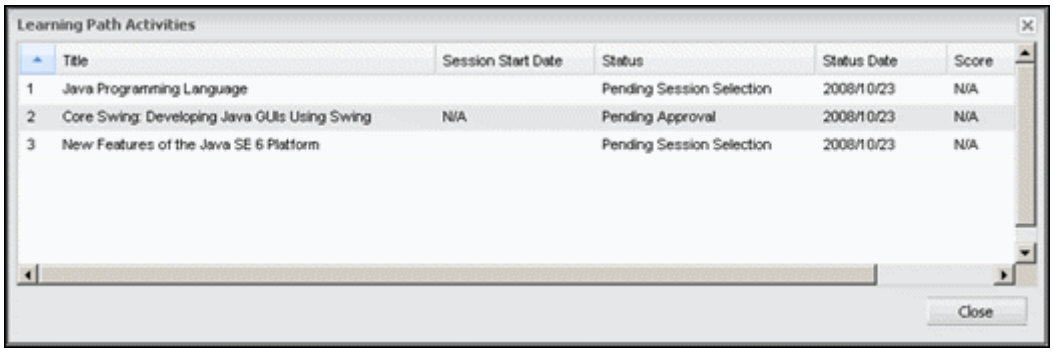
11 To prevent duplicates in enrollment, select the **Prevent duplicate student enrollment** check box.

12 Click the **OK** button when selection(s) have been made.

To View Learning Path Activities

1 With the **Students** tab opened, click on a **Student Name** link.

The **Learning Path Activities** pop-up opens.



2 To sort the list, click the **Column Header** for the column you want to sort.

The sorting arrow indicates the ascending or descending sorting direction.

- Click the same column header again to sort in the opposite direction.

3 Click the **Close** button.

To Delete a Student from a Learning Path

1 With the **Students** tab opened, select the check box next to the **Student Name** you want to delete.

To select all available check boxes, use the check box to the left of the **Student Name** column.

NOTE: Deleting students from a path will delete all associated learning activities for the student.

2 Click the **Delete** button.

A confirmation pop-up opens.

3 Click the **OK** button to confirm.

Viewing Associated Certifications

When a Learning Path is associated with certifications, you can view the particular certification and its details.

Students who successfully complete the Learning Path may be entitled to receive the associated certification(s). This information is used to provide reference only and cannot be modified from this page.

NOTE: If a Certification has a status of "Draft" or "Archived," it will not appear in the list of associated Certifications.

To View Associated Certifications

1. From the **Learning Path Details** page, click the **Certifications** tab.

   The **Certification** area displays in the lower panel.

   NOTE: Titles of any certifications associated with the unit are listed.

2. To sort a **Certifications** list, click the **Title** column header.

   The sorting arrow indicates the ascending or descending sorting direction.

   - Click the same column header again to sort in the opposite direction.

3. Click the **Title** link of the **Certification** you want to view.

   The selected **Certification Details** page displays.

Chapter 6

Sessions

This section describes *Halogen eLearning Manager* sessions. A session is an instance of a learning unit that takes place at a fixed time. A session is comprised of a single class or a series of classes. An example of a session could be a first aid course that takes place at a specified time. Independent learning, on the other hand, is not a session since it does not take place at a fixed time.

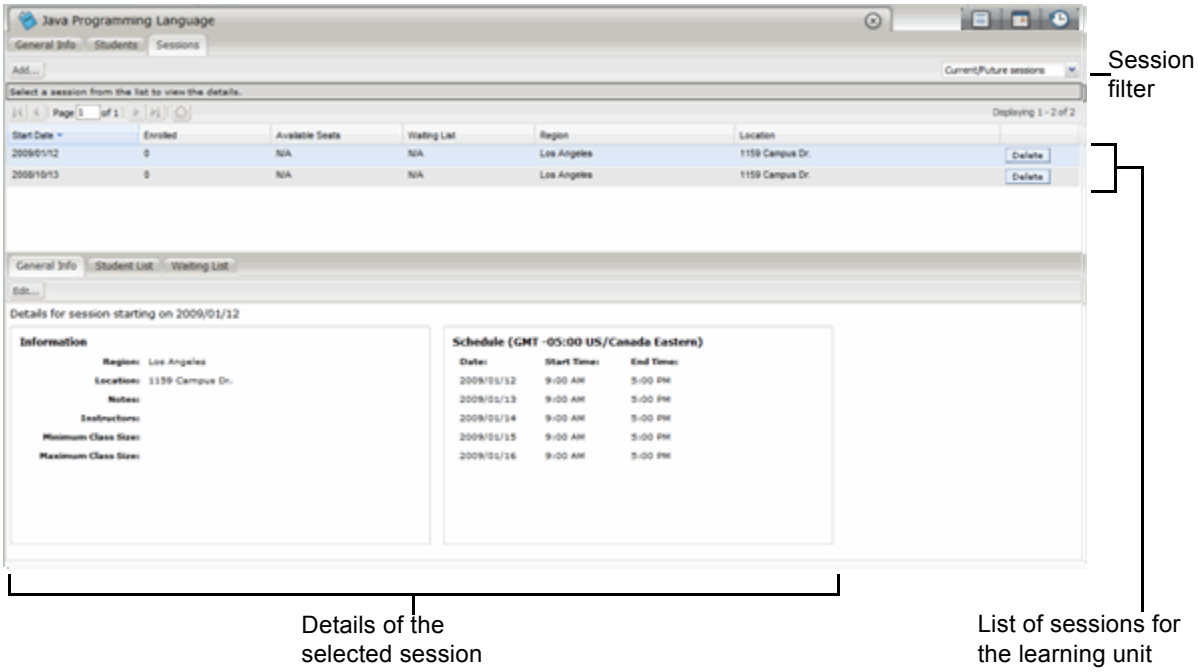
The section topics are as follows:

- *"About Sessions" on page 84*
- *"Adding a Session" on page 85*
- *"Editing a Session" on page 87*
- *"Deleting a Session" on page 88*
- *"Canceling a Session" on page 88*
- *"Filtering the Session List" on page 89*
- *"Sorting the Session List" on page 89*
- *"Viewing Session Details" on page 90*

About Sessions

A session is an instance of a learning unit that takes place at a fixed time. An example of a session could be a first aid course that takes place at a specified time. Independent learning, on the other hand, is not a session since it does not take place at a fixed time.

In the *eLearning Manager* system, a session list is available for each session-based learning unit. The session list includes all of the sessions for the specific learning unit that you are viewing. By default, only current and future sessions display, but you can display past and cancelled sessions using the session filter. An example of a session list appears below:



Select a session from the list to view the details of that session. You can also use the session filter to view all sessions, current/future sessions, or cancelled sessions.

For more information on what you can do with sessions, see any of the following:

- *"Adding a Session" on page 85*
- *"Editing a Session" on page 87*
- *"Deleting a Session" on page 88*
- *"Canceling a Session" on page 88*
- *"Filtering the Session List" on page 89*
- *"Sorting the Session List" on page 89*
- *"Viewing Session Details" on page 90*

Note that learning paths cannot have sessions.

Adding a Session

You can add sessions for any learning unit that has been configured as session-based when it was created. For more information on creating a session-based learning unit, see *"Creating Learning Units" on page 29*.

The following procedure assumes that a session-based learning unit has already been created.

To Add a Session

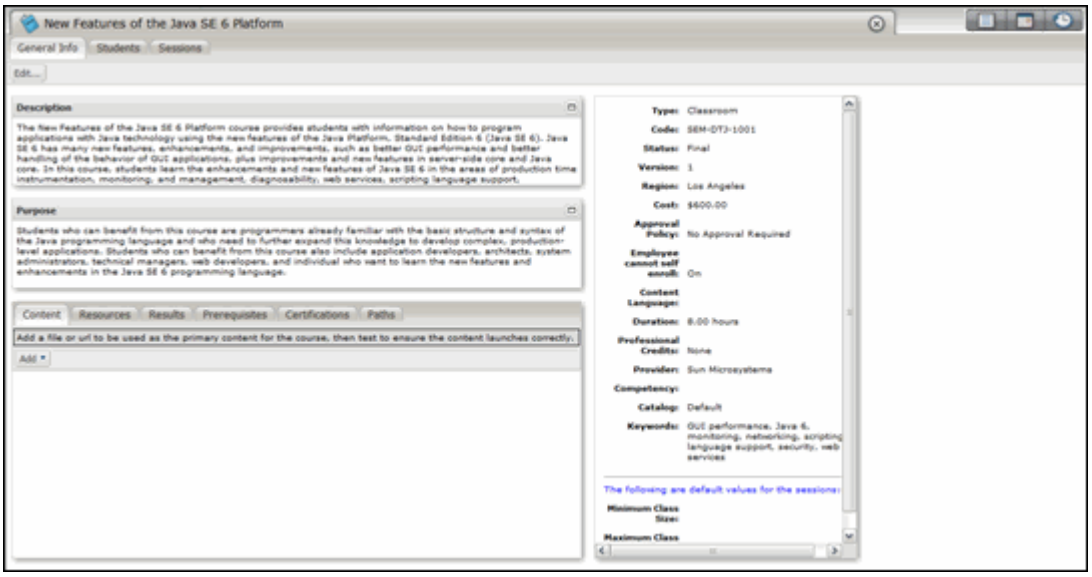
1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the learning unit you want to add a session to.

The learning unit details displays showing the **General Info** tab.

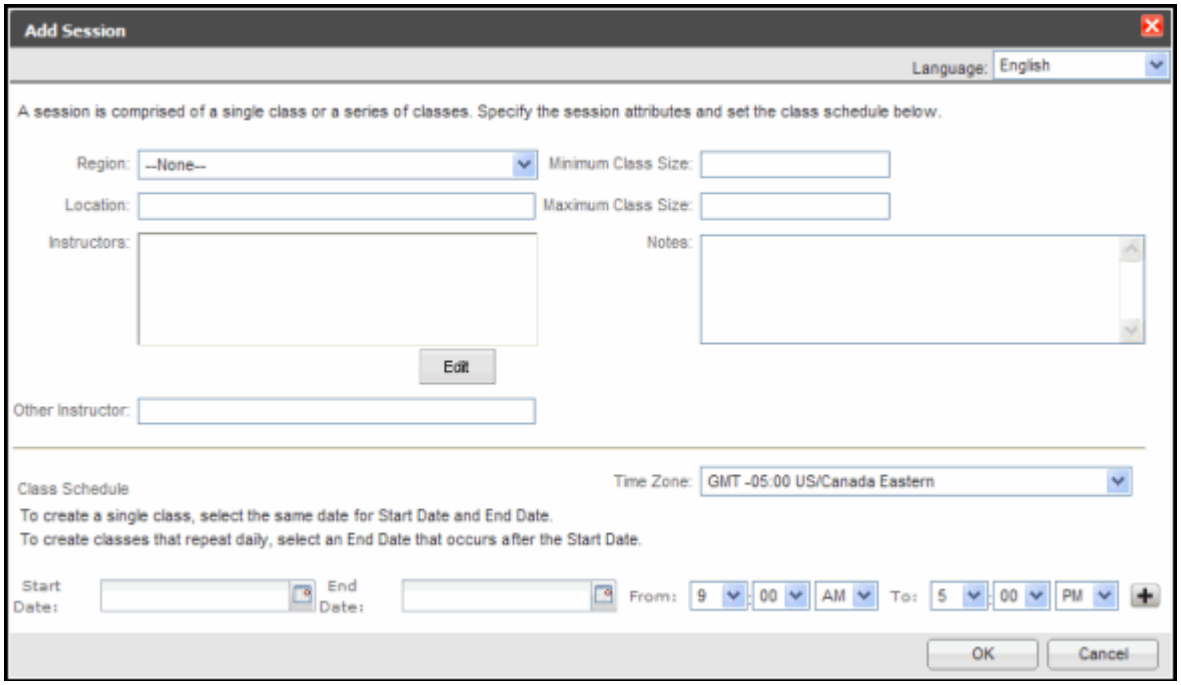


3 Click the **Sessions** tab.

The session list for the learning unit you selected displays.

4 Click the **Add...** button.

The **Add Session** window displays.



5 Do any of the following:

- To add a session in which the scheduled times are the same (for example, Monday to Thursday from 9 am to 5 pm) click the calendar icon next to the **Start Date** field to add a start date (Monday), then click the calendar icon next to the **End Date** field (Thursday), and then enter the start (9 am) and end time (5 pm) for the class using the **From** and **To** drop-down lists.

The calendar should look like this:

NOTE: If you want to schedule a class for a single day only, enter the same date in the **Start Date** and **End Date** fields.

- To add a session that has a different schedule on different days (for example, Monday to Thursday 9 am to 5 pm and Friday from 9 am to 12 pm), configure the Monday to Thursday times using the procedure mentioned in the bullet above, and then click the add button to add the new time schedule (for the Friday time mentioned in the example above).

In this example, you'd need two entries: one entry for Monday to Thursday from 9 am to 5 pm, and another entry for Friday from 9 am to 1 pm.

The calendar should now look like this:

6 (Optional) Do any of the following:

- In the **Region** drop-down list, select a region. Regions are defined in the *eLearning Manager* options. For more information on defining regions, see *"About Regions" on page 132*.
- In the **Location** field, enter the location of the session. For example, use this field to specify an address, building name, and so forth.
- In the **Instructors** area, click the **Edit** button to select instructors from the User Center.
- In the **Other Instructor** area, enter another instructor that is not included in the User Center.
- Enter the minimum and maximum class size in the **Minimum Class Size** and **Maximum Class Size** fields, respectively.
- In the **Notes** area, enter any relevant notes for the session.
- In the **Time Zone** drop-down list, select a time zone.

7 Click the **OK** button.

The new session appears in the session list.

Editing a Session

If you need to edit a session that has already been created, you can edit it from the session details page.

To Edit a Session

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the learning unit containing the session you want to edit.

The learning unit session details display showing the **General Info** tab.

3 Click the **Sessions** tab.

The **Session** list for the learning unit you selected displays.

4 Click the session you want to edit.

The session details display in the lower part of the window.

5 Click the **Edit...** button.

The **Edit** Session window displays.

6 Edit the fields as required.

For more information on these fields, see *"Adding a Session" on page 85*.

7 Click the **OK** button.

The session details are updated.

Deleting a Session

You can only delete a session if there are no employees enrolled in it. You can cancel a session if there are employees enrolled in it, however. For more information on canceling a session, see *"Canceling a Session" on page 88*.

To Delete a Session

1. From the **Learning Control Center**, click the **Learning** link.
   The **Learning** page displays.
   NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.
2. Click the learning unit containing the session you want to delete.
   The learning unit details displays showing the **General Info** tab.
3. Click the **Sessions** tab.
   The session list for the learning unit you selected displays.
4. Click the **Delete** button for the session you want to delete.
   A confirmation window displays.
5. Click the **OK** button to confirm.

Canceling a Session

If there are students enrolled in the session, you cannot delete it, but you can cancel it. Students that were enrolled in the session before it was cancelled will still appear on the student list for the learning unit, but their status will now be "Requiring Session Selection." That is, they will still appear on the student list for the learning unit, but they must be added to a different session.

To Cancel a Session

1. From the **Learning Control Center**, click the **Learning** link.
   The **Learning** page displays.
   NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.
2. Click the learning unit containing the session you want to cancel.
   The learning unit details displays showing the **General Info** tab.
3. Click the **Sessions** tab.
   The session list for the learning unit you selected displays.
4. Click the **Cancel** button for the session you want to cancel.
   A confirmation window displays.

5 Click the **OK** button to confirm.

Filtering the Session List

By default, current and future sessions are shown in the session list. You can filter the list to display all sessions, current/future sessions, past sessions, or canceled sessions. If the current learning unit has many sessions associated with it, you might want to filter the list to help you find the session you're looking for.

To Filter the Session List

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the learning unit containing the sessions you want to filter.

The learning unit details displays showing the **General Info** tab.

3 Click the **Sessions** tab.

The session list for the learning unit you selected displays.

4 Use the drop-down list in the top-right corner to select either **All sessions**, **Current/Future sessions**, **Past sessions**, or **Canceled sessions**.

Sorting the Session List

By default, the session list is sorted by the start date, but you can sort any of the columns in the session list. Specifically, you can sort the session list by the session start date, the number of enrolled students, the number of available seats, the number of students on the waiting list, the region of the session, and the location of the session. For example, you may want to sort the Waiting List column to determine which sessions may need more seats.

To Sort the Session List

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the learning unit containing the session list you want to sort.

The learning unit details displays showing the **General Info** tab.

3 Click the **Sessions** tab.

The session list for the learning unit you selected displays.

4 Click the column header for the column you want to sort. For example, if you want to sort the session list based on the number of enrolled students, click the **Enrolled** column header.

A sorting arrow appears to indicate the sorting direction (ascending or descending order).

Tip: Click the same column header again to sort in the opposite direction.

Viewing Session Details

Viewing the session details provides you with more detailed information about individual sessions such as the names of instructors, session notes, minimum/maximum class sizes, and so forth.

To View Session Details

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the learning unit containing the session whose details you want to view.

The learning unit details displays showing the **General Info** tab.

3 Click the **Sessions** tab.

The session list for the learning unit you selected displays.

4 Click the session to view the session details.

The session details display below the session list.

Tip: From this screen you can also view the student and waiting lists associated with the session.

Chapter 7

Working with Students

This section describes working with students for learning units and sessions. In addition, it also covers importing results for students.

The section topics are as follows:

- *"About Working with Students and Sessions" on page 92*
- *"Adding Students to a Learning Unit" on page 93*
- *"Adding a Group to a Learning Unit" on page 95*
- *"Deleting Students from a Learning Unit" on page 96*
- *"Enrolling Students in Session-based Learning" on page 97*
- *"Adding Students to the Session Student List" on page 98*
- *"Deleting Students from the Session Student List" on page 101*
- *"Entering Session Results for Students" on page 102*
- *"Entering Results for Non-session-based Learning" on page 104*
- *"Importing Learning Results for Students" on page 105*
- *"Printing Student Lists" on page 107*
- *"Filtering the Student List" on page 108*
- *"About the Waiting List" on page 109*
- *"Sending Students from Waiting List to the Student List" on page 109*
- *"Adding Notes Regarding Students" on page 110*

About Working with Students and Sessions

In the *Halogen eLearning Manager* module, a student is defined as an employee that has been added to a learning unit. A session is an instance of a learning unit that takes place at a fixed time. A session is comprised of a single class or a series of classes. An example of a session could be a first aid course that takes place at a specified time.

You can add students to:

- learning units
- specific sessions

A student can appear more than once on the student list for a learning unit. For session-based learning, for example, a student may attend more than one session, so the student can appear several times on the student list as a result. Similarly, for non-session-based learning, the student may appear more than once on the student list, because he or she may be required to take a course once a year. Note that a student cannot appear more than once on the student list for a specific session, however.

When a student is added to a non-session-based learning unit, the student's status is "Under Approval" or "Enrolled," depending on the approval policy for the learning unit. For more information on approval policies, see *"About Approval Policies" on page 126*.

When a student is added to a session-based-learning unit, the student's status is "Requiring Session Selection," since a session must be selected for the student. Depending on your process, the student may select the session, or the session can be selected by the administrator, manager, learning and development specialist, and so forth. After a session has been selected, the student's status becomes "Enrolled" or "Under Approval." Again, the enrollment status is determined by the approval policy for the learning unit.

The following types of users can access student lists:

- Super Administrators
- Learning Administrators
- Catalog Managers (only for assigned catalogs)
- Enrollment and Session Managers
- Learning and Development Specialists
- Instructors (only for sessions to which they are assigned)

For more information on these *eLearning Manager* roles, see *"About eLearning Manager Roles" on page 3*.

For more information on working with students and sessions, see any of the following:

- *"Adding Students to a Learning Unit" on page 93*
- *"Adding a Group to a Learning Unit" on page 95*

- *"Deleting Students from a Learning Unit" on page 96*
- *"Enrolling Students in Session-based Learning" on page 97*
- *"Adding Students to the Session Student List" on page 98*
- *"Deleting Students from the Session Student List" on page 101*
- *"Entering Session Results for Students" on page 102*
- *"Entering Results for Non-session-based Learning" on page 104*
- *"Importing Learning Results for Students" on page 105*
- *"Printing Student Lists" on page 107*
- *"Filtering the Student List" on page 108*
- *"About the Waiting List" on page 109*
- *"Sending Students from Waiting List to the Student List" on page 109*
- *"Adding Notes Regarding Students" on page 110*

Adding Students to a Learning Unit

You can add students to a learning unit regardless of whether it is a session-based or a non-session-based learning unit. For example, you can add students to the learning unit, and then pick sessions at a later time, or, if the learning unit allows students to self-enroll, the students can enroll in the sessions of their choice.

Once students are added to the learning unit, you can enter results for them or import results. For more information, see *"Entering Session Results for Students" on page 102*, *"Entering Results for Non-session-based Learning" on page 104*, and/or *"Importing Learning Results for Students" on page 105*.

Note that the learning unit must have a status of "final" before you can add students to it. That is, you cannot add students to a learning unit that has a status of "draft" or "archived." For more information on changing the status of a learning unit, see *"Changing the Status of a Learning Unit" on page 38*.

To Add Students to a Learning Unit

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

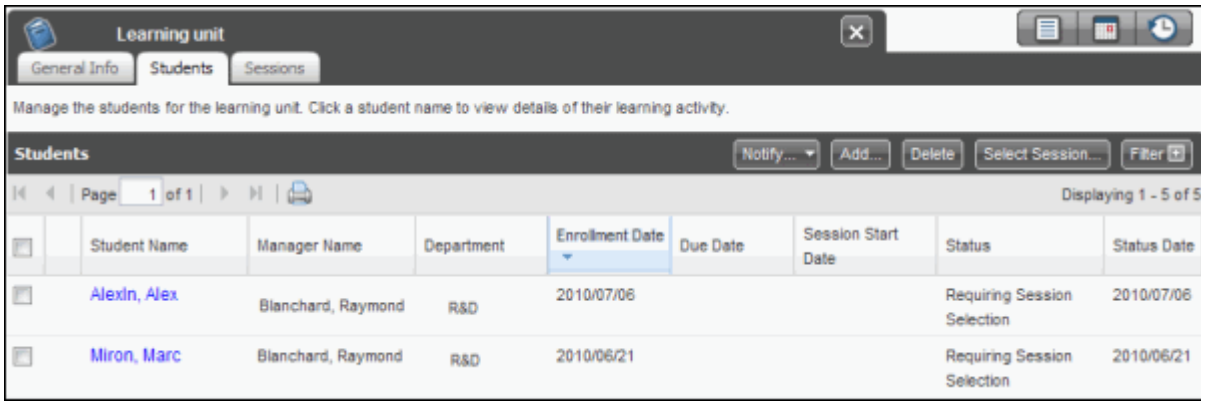
NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the link for the learning unit that you want to add students to.

The learning unit displays with the **General Info** tab selected.

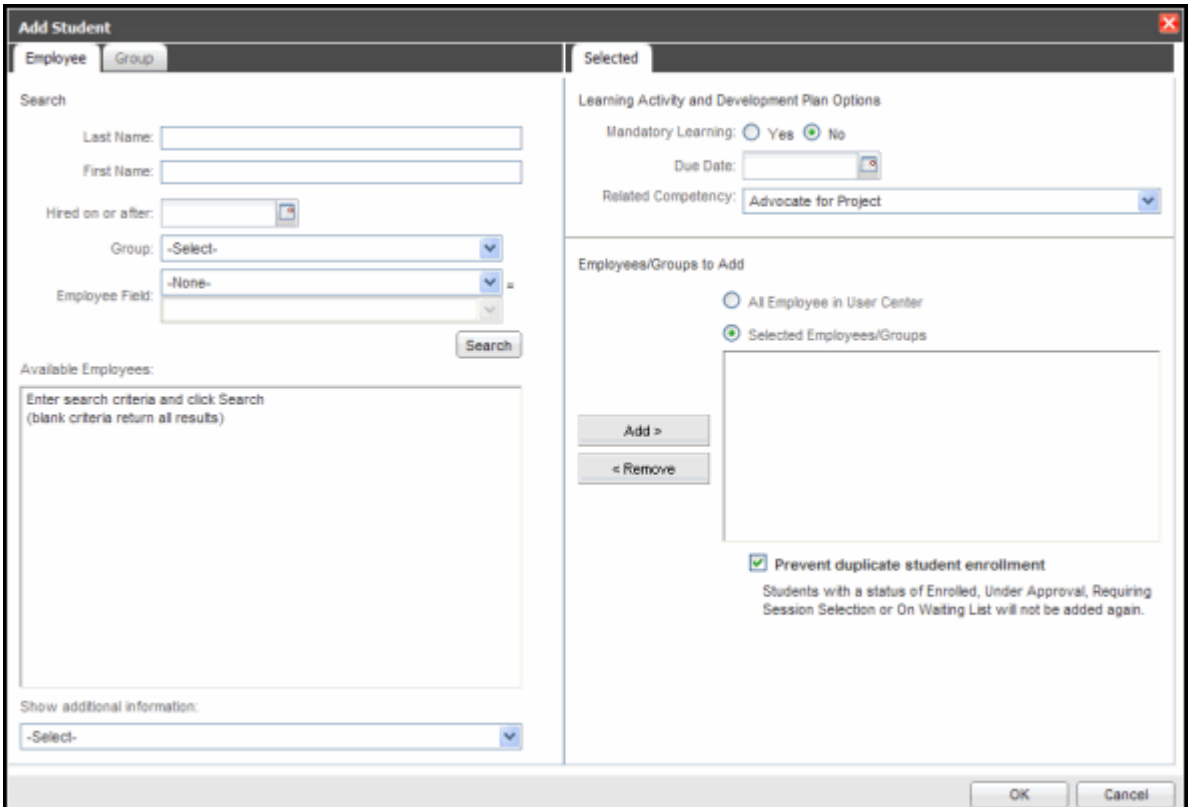
3 Click the **Students** tab.

The student list for the learning unit displays.



4 Click the **Add...** button.

The **Add Student** window displays.



5 (Optional) Do any of the following:

- Enter the first few letters of the employee's last and/or first name in the **Last Name** and/or **First Name** fields.

Tip: If there are employees with similar names in your organization, and you need more information to identify the employee you want to add, select either **Department** or **Email Address** from the **Show Additional Information** drop-down list.

- Click the calendar icon next to the **Hired on or after** field to search by the employee's hire date.
- Use the **Group** drop-down list to select the employee's group.
- Use the **Employee Field** drop-down list to select a field, and then use the drop-down list to select a field.

6 Click the **Search** button.

7 In the **Available Employees** area, select the employee(s) you want to add, and then click the **Add >** button.

Tip: Click the **All Employees in User Center** radio button if you want to add all of the employees from the User Center as students for the learning unit.

8 (Optional) Configure any of the following learning activity and development plan options:

- Click the **Yes** radio button in the **Mandatory Learning** area to make this learning required for the selected employee(s). A mandatory learning icon will appear for both you and the employee when viewing the learning unit.
- Click the calendar icon to add a due date for the learning.
- In the **Related Competency** drop-down list, select a competency. The list of competencies is derived from the default list when the system is first installed or upgraded.

9 To prevent duplicate enrollment, select the **Prevent duplicate student enrollment** check box.

10 Click the **OK** button.

The student list is updated to show the students added to the learning unit.

Adding a Group to a Learning Unit

Similar to individual users, you can add a group (or groups) to a learning unit. Once you add the group, all of the employees in the group will appear on the student list for the learning unit.

Note that the learning unit must have a status of "final" before you can add groups to it; you cannot add a group to a learning unit that has a status of "draft" or "archived." For more information on changing the status of a learning unit, see *"Changing the Status of a Learning Unit" on page 38*.

To Add a Group to a Learning Unit

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the link for the learning unit that you want to add a group to.

The learning unit displays with the **General Info** tab selected.

3 Click the **Students** tab.

The **Students** list for the learning unit displays.

4 Click the **Add...** button.

The **Add Student** window displays.

5 Click the **Group** tab.

A list of the groups created in the User Center appears.

6 Select the group(s) you want to add to the learning unit, and then click the **Add >** button.

7 (Optional) Configure any of the following learning activity and development plan options:

- Click the **Yes** radio button in the **Mandatory Learning** area to make this learning required for the selected group(s). A mandatory learning icon will appear for the learning unit and all employees in the group.
- Click the calendar icon to add a due date for all members of the group.
- In the **Related Competency** drop-down list, select a competency for all members of the group.

8 Click the **OK** button.

The student list is updated to show the students from the group(s) have been added to the student list for the learning unit.

Deleting Students from a Learning Unit

You can delete students from a learning unit at any time. If the students are enrolled in a session, they will be deleted from the session as well.

To Delete Students from a Learning Unit

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the link for the learning unit that you want to delete students from.

The learning unit displays with the **General Info** tab selected.

3 Click the **Students** tab.

The **Students** list for the learning unit displays.

4 Select the check box(es) next to the student(s) you want to delete from the learning unit.

5 Click the **Delete** button.

6 Click the **OK** button to confirm.

The student(s) is (are) deleted from the learning unit.

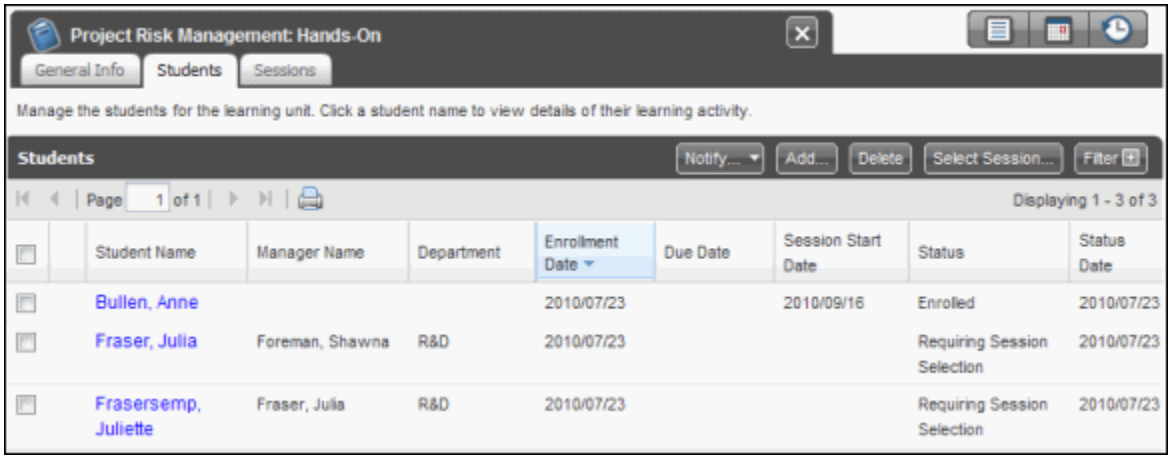
Enrolling Students in Session-based Learning

Once you have added students to a learning unit, you can then enroll them in a session. Note that you can also add students to sessions from individual sessions. For more information, see *"Adding Students to the Session Student List" on page 98*.

To Enroll Students in a Session

1 Ensure you have added the student(s) to the student list for the learning unit. For more information, see *"Adding Students to a Learning Unit" on page 93*.

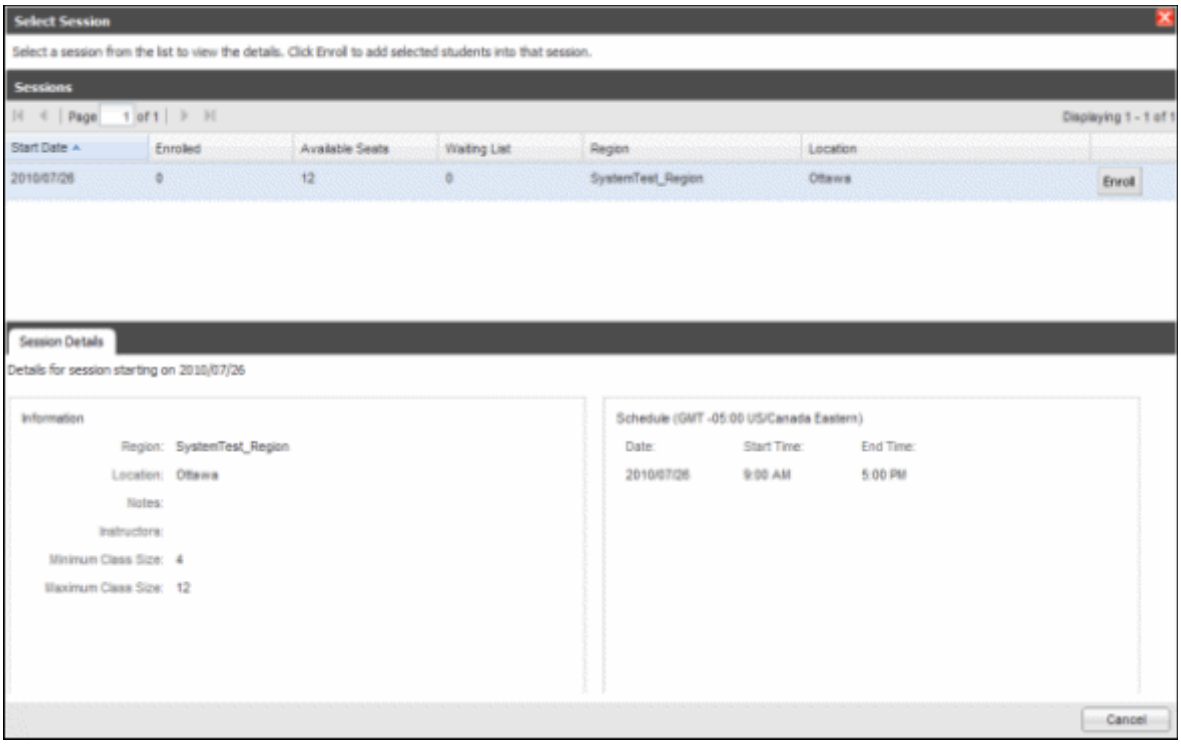
The student list for the learning unit displays. Students that have not yet been enrolled in a session will have a status of "Requiring Session Selection" or "On Waiting List."



2 From the learning unit student list, select the check box(es) next to the student(s) that you want to enroll in a session.

3 Click the **Select Session...** button.

The **Select Session** window displays.



4 Select a session from the list.

The lower part of the window updates to display detailed session information such as the instructors of the session, start and end times, and so forth.

5 Click the **Enroll** button in the appropriate row.

The student's status changes to "Enrolled" on the student list for the learning unit.

NOTE: If an approval is required, the student's status will be "Under Approval" on the student list.

Adding Students to the Session Student List

You can add students to a session student list if you do not want the student to choose their own session.

The following procedure assumes that a session has already been created. For more information on adding a session, see *"Adding a Session" on page 85*.

To Add Students to a Session

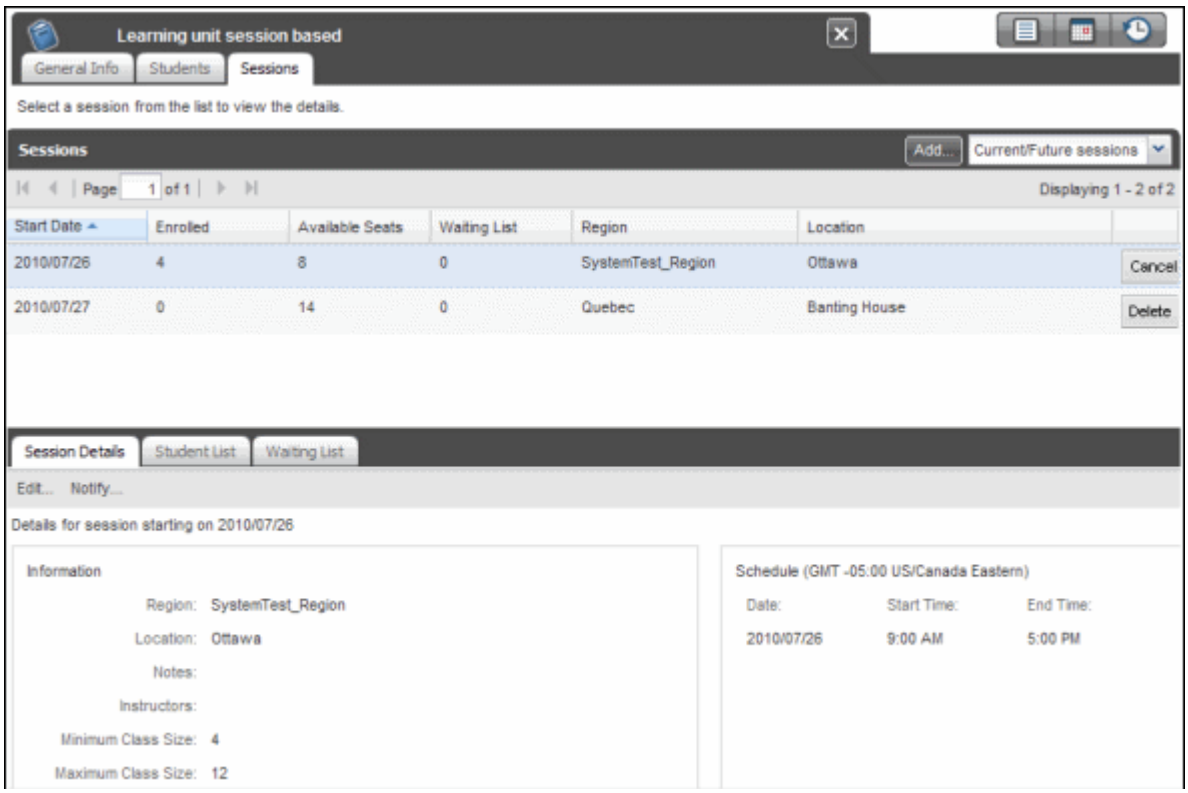
1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the link for the session-based learning unit that you want to add students to.
The learning unit displays with the **General Info** tab selected.

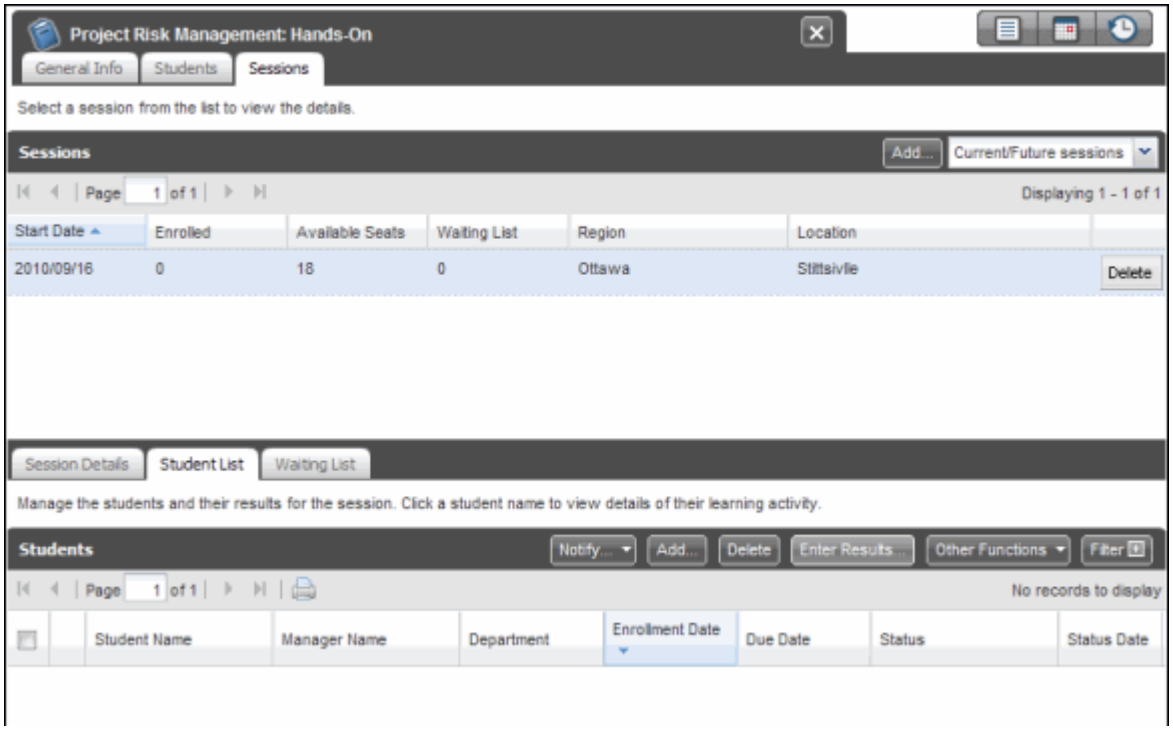
3 Click the **Sessions** tab.
The session list for the learning unit displays.



4 From the session list, click the session you want to add students to.
The details for the session you selected appear in the lower part of the window.

5 Click the **Student List** tab.

The list of students currently associated with the session appears in the lower part of the window.



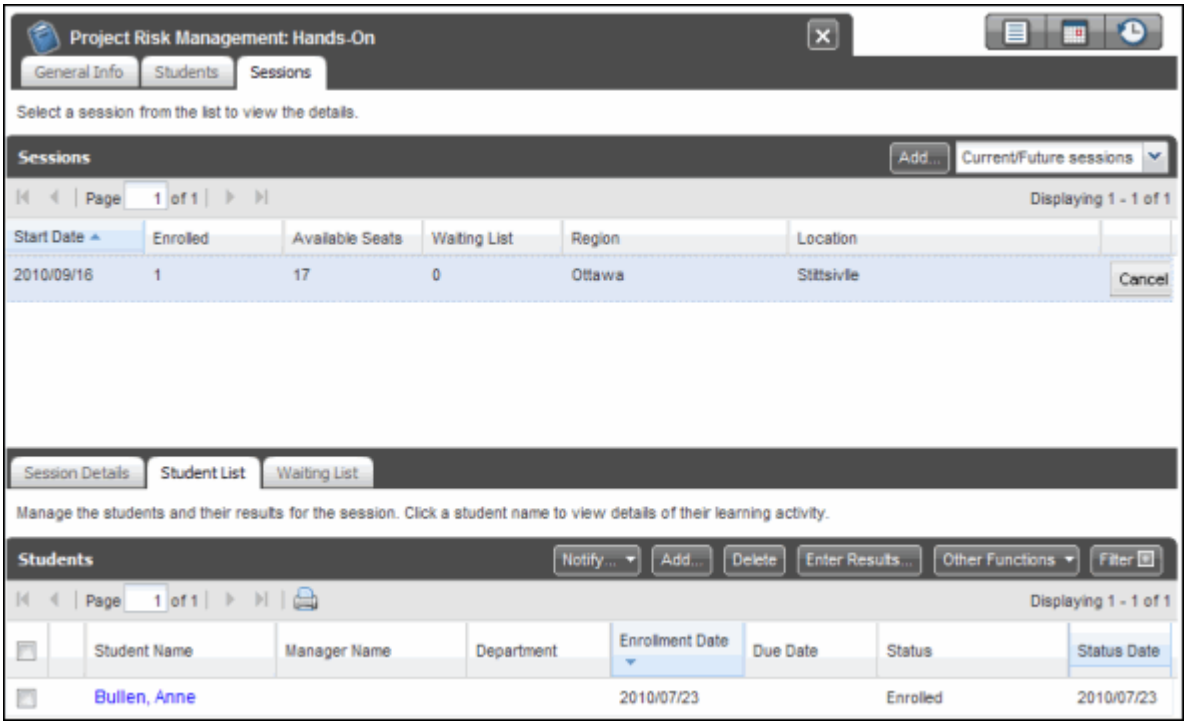
6 Click the **Add** button in the lower part of the window.

The **Add Student** window displays.

7 Select the student you want to add to the session.

For more information on adding a student, see *"Adding Students to a Learning Unit" on page 93*.

The student appears in the student list for the session. The student's status will either be "Enrolled," or "Under Approval," depending on the approval policy for the learning unit.



Deleting Students from the Session Student List

You can delete a student from the session student list at any time. Enrolled students that you delete will no longer have the learning unit in their learning activity list.

If there are students on the waiting list for the session, deleting a student will cause the first student on the waiting list to be added to the session. For more information on the waiting list, see *"About the Waiting List" on page 109*.

To Delete Students from a Session

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the link for the session-based learning unit that you want to delete students from.

The learning unit displays with the **General Info** tab selected.

3 Click the **Sessions** tab.

The session list for the learning unit displays.

4 From the session list, click the session you want to delete students from.

The details for the session you selected appear in the lower part of the window.

5 Click the **Student List** tab.

The list of students currently associated with the session appears in the lower part of the window.

6 Select the check box(es) next to the student(s) you want to delete from the session.

7 Click the **Delete** button.

8 Click the **OK** button in the confirmation window.

The student is removed from the session student list.

Entering Session Results for Students

Depending on how the learning unit results are configured, you have several options when adding results for sessions. For more information on configuring learning unit results, see *"Managing Results Settings for a Learning Unit" on page 43*.

For example, depending on how results are configured for the learning unit, you can enter results to provide a score (percentage or numeric) for the session. You can also enter results by changing the student's status for the session, such as indicating that the student has withdrawn from the session.

If you have a large number of students that you want to enter results for, you can award them all a complete grade and/or award them all a passing grade.

If you want to add a certification of completion, such as a report card, test result, and so forth, for auditing purposes, you can do so below. You can use .PDF, .DOC, .DOCX, .TXT, .XLS, .XLSX, .JPG, .GIF, or .BMP files, and these files must be smaller than 10 MB each.

The following procedure tells you how to enter results for session-based learning. To enter results for non-session-based learning, see *"Entering Results for Non-session-based Learning" on page 104*.

To Enter Session Results for Students

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the link for the appropriate session-based learning unit.

The learning unit displays with the **General Info** tab selected.

3 Click the **Sessions** tab.

The session list for the learning unit displays.

4 From the session list, click the session you want to add results for.

The details for the session you selected appear in the lower part of the window.

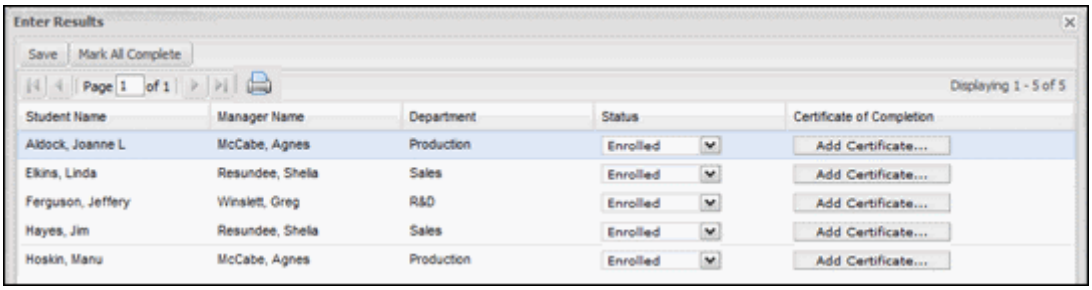
5 Click the **Student List** tab.

The list of students currently associated with the session appears in the lower part of the window.

6 Select the check box(es) next to the student(s) whose results you want to enter.

7 Click the **Enter Results...** button.

The **Enter Results** window displays. Depending on how the results have been configured for the learning unit, you have several scoring options.



8 Do any of the following:

- Click the **Mark All Completed** button to award a “Completed” mark to all the students with a status of “Enrolled” for this session, and then click the **OK** button to confirm.
- Click the **Mark All Pass** button to award a pass mark to all students. Only students that have a status of “Complete” or “Enrolled” and have not already received a “Passed” or “Failed” mark will be updated.
- In the **Status** column, select the status. For example, if the student has successfully completed the learning unit, select **Completed**.
- In the **% score** or **Numeric Score** column, enter a score expressed as a percentage or a number, respectively.
- In the **Pass/Fail** column, select either **Pass** or **Fail** from the drop-down list.
- If you want to award a certification of completion, for example, for auditing purposes, click the **Add Certificate** button, then click the **Browse** button, then select the file you want to upload, then click the **Open** button, and then click the **OK** button. Click the **Remove Certificate** button to remove it, or click the paper clip icon to view the certificate.

9 Click the **Save** button.

10 Click the **Close** button.

The session student list is updated to reflect your changes.

Entering Results for Non-session-based Learning

You can enter results for non-session-based learning by entering or importing results for students associated with the learning unit. For information on importing results for session-based learning, see *"Importing Learning Results for Students" on page 105*.

If you want to add a certification of completion, such as a report card, test result, and so forth, for auditing purposes, you can do so below. You can use .PDF, .DOC, .DOCX, .TXT, .XLS, .XLSX, .JPG, .GIF, or .BMP files, and these files must be smaller than 10 MB each.

The following procedure assumes you already have added students to the learning unit. For more information, see *"Adding Students to a Learning Unit" on page 93*.

To Enter Results for Non-session-based Learning

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the link for the appropriate learning unit.

The learning unit displays with the **General Info** tab selected.

3 Click the **Students** tab.

The student list for the learning unit displays.

4 Select the check box(es) next to the employee(s) you want to enter results for.

5 Click the **Enter Results...** button.

The **Enter Results** window displays. Depending on how the results have been configured for the learning unit, you have several scoring options.

6 Do any of the following:

- Click the **Mark All Completed** button to award a "Completed" mark to all the students with a status of "Enrolled" for this session, and then click the **OK** button to confirm.
- Click the **Mark All Pass** button to award a pass mark to all students (except those who already have marks for this session) with a status of "Enrolled" or "Completed" in the session, and then click the **OK** button to confirm.
- In the **Status** column, select the status. For example, if the student has successfully completed the learning unit, select **Completed**.
- In the **% score** or **Numeric Score** column, enter a score expressed as a percentage or a number, respectively.
- In the **Pass/Fail** column, select either **Pass** or **Fail** from the drop-down list.
- If you want to award a certification of completion, for example, for auditing purposes, click the **Add Certificate** button, then click the **Browse** button, then select the file you want to upload, then click the **Open** button, and then click the **OK** button. Click the **Remove Certificate** button to remove it, or click the paper clip icon to view the certificate.

7 Click the **Save** button.

8 Click the **Close** button.

Importing Learning Results for Students

If you have prior results for students, you can import these results into the *eLearning Manager* system. You can import results for non-session-based learning units or session-based learning units. The results must be in the form of a delimited text file and may include the status, date, score, and a pass/fail mark. In addition, the results for each student must appear on a separate row.

Student information can be matched using the employee ID, username, or email address.

NOTE: The following procedure is based on a scored learning unit in which the score is expressed as a percentage. Your learning units may differ, but the procedure for importing results will be very similar. For example, if your learning unit does not use scoring, you will not see the fields for entering scoring information.

To Import Results for Students

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the link for the appropriate learning unit.

The learning unit displays with the **General Info** tab selected.

3 Do one of the following:

- If you want to import results for non-session-based learning, click the **Students** tab

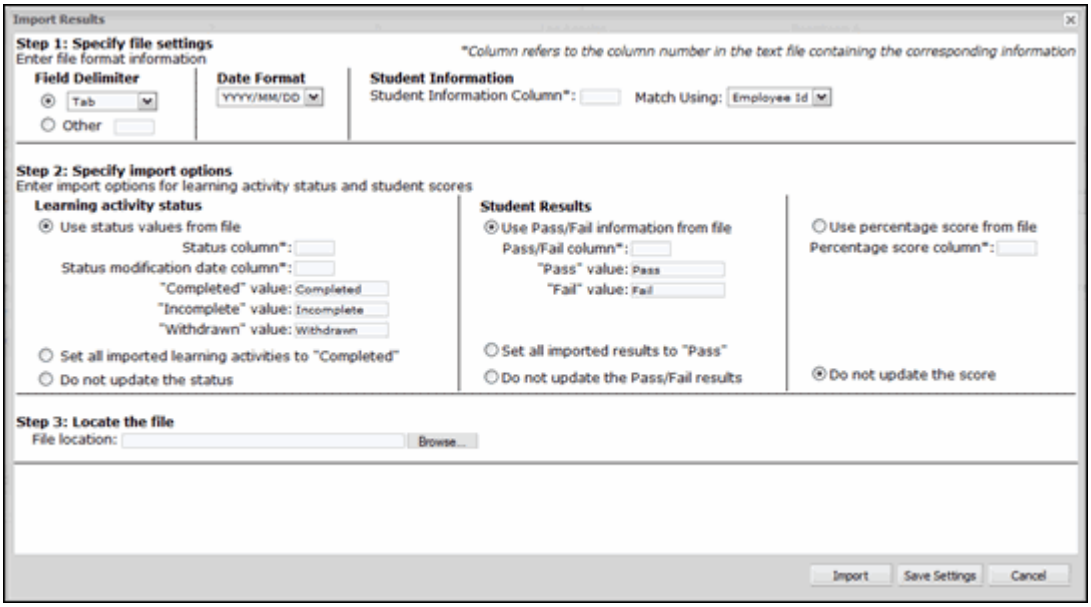
OR

- If you want to import results for session-based learning, click the **Sessions** tab, select the session, and then click the **Student List** tab.

4 Select the check box(es) next to the student(s) whose results you want to import.

5 Click the **Other Functions** button and select **Import Results...**.

The **Import Results** window displays.



6 Do either of the following:

- Specify the field delimiter of your text file. For example, if your file uses commas as the delimiter, select **Comma** from the drop-down list.

OR

- Click the **Other** radio button, and then enter a single character as the delimiter in the field.

7 Specify the **Date Format** used in your text file using the drop-down list.

8 In the **Student Information** area, enter a number for the column containing student information in your text file, and then select either **Employee ID**, **Username**, or **Email** from the **Match Using** drop-down list.

9 In the **Learning activity status** area, do one of the following:

- If you want to use learning activity status information from your text file, click the **Use status values from file** radio button, and then enter a number in the **Status column** field, and then, if required, enter a number in the **Status modification date column** field.

If required, you can edit the default text in the **"Completed" value**, **"Incomplete" value**, and/or **"Withdrawn" value** fields.

OR

- If you want to mark all learning activities as completed upon import, click the **Set all imported learning activities to "Completed"** radio button.

OR

- If you do not want to import any status information or do not have status in formation in your file, click the **Do not update the status** radio button.

10 In the **Student Results** area, do one of the following:

- If you want to use pass/fail results from your source data, click the **Use Pass/Fail information from file** radio button, and then enter a number in the **Pass/Fail column** field, and then, if required, you can change the text in the "**Pass" value** and **"Fail" value** fields.

OR

- If you want to set all results as pass upon import, click the **Set all imported results to "Pass"** radio button.

OR

- If you do not want to import any pass/fail results or if your data does not contain pass/fail results, click the **Do not update the Pass/Fail results** radio button.

11 Do either of the following:

- If your data uses a percentage figure for scoring, click the **Use percentage score from file** radio button, and then enter a number in the **Percentage score column** field.

OR

- If you do not want to update the score upon import, click the **Do not update the score** radio button.

12 (Optional) Click the **Save Settings** button to save these settings so you can use them the next time you import results.

13 Click the **Browse** button to search for the text file on your computer, locate the file, and then click the **Open** button.

14 Click the **Import** button.

The **Import Summary** window appears that identifies the number of successful updates.

15 Click the **Close** button.

Printing Student Lists

You can print both the learning unit student list and the session student list. You cannot print the waiting list, however.

To Print the Student List for a Learning Unit or a Session

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the link for the appropriate learning unit.

The learning unit displays with the **General Info** tab selected.

3 Do either of the following:

- To print the entire student list for the learning unit, click the **Students** tab, and then click the print icon .

or

- To print the student list for a specific session, click the **Sessions** tab, then click the session, then click the **Student List** tab, and then click the print icon .

The list appears in a new browser window.

4 Print the list using your browser's print feature.

Filtering the Student List

If there are many students on the student list, you can filter it by last name, first name, enrollment date, and/or status to help you find the student you're looking for.

To Filter the Student List

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the link for the appropriate learning unit.

The learning unit displays with the **General Info** tab selected.

3 Do either of the following:

- To filter the entire student list for the learning unit, click the **Students** tab.

or

- To filter the student list for a specific session, click the **Sessions** tab, then click the session, and then click the **Student List** tab.

4 Click the **Filter** button to show the filters.

The list of filters displays above the student list.

5 Do any of the following:

- In the **Last Name** field, enter the student's last name or the first few letters of the student's last name.
- In the **First Name** field, enter the student's first name or the first few letters of the student's first name.
- Click the calendar next to the **From** and/or **To** fields in the **Enrollment Date** area, and then click a date.
- In the **Status** drop-down list, select a status.

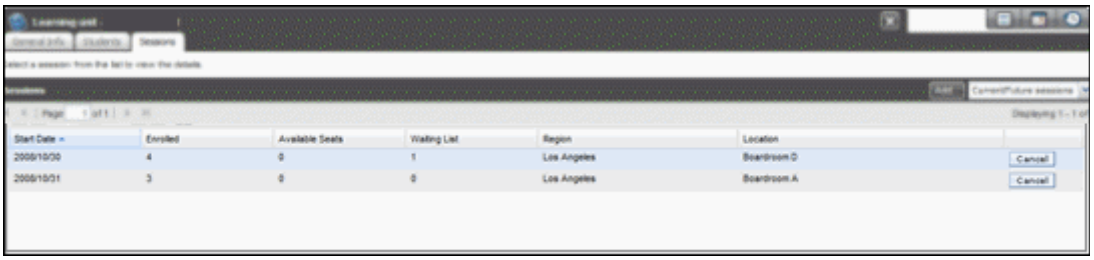
6 Click the **Search** button.

The student list is updated to reflect your search filters.

About the Waiting List

The session waiting list is only used when the maximum number of seats in a session has been reached. That is, if the maximum number of seats have been allocated to students for a session and then you attempt to add more students to it, they will automatically be added to the waiting list.

In the example below, for the session starting 2008/10/30, the maximum number of seats are four and there is one student on the waiting list. Once another student is added to the session, he/she will appear on the waiting list.



If you want to override the maximum number of seats for the session, you can send students from the waiting list to the student list for a specific session. For more information, see *"Sending Students from Waiting List to the Student List" on page 109*.

If you delete a student from a session and that session has a waiting list, the first student on the waiting list takes the seat of the deleted student. For more information on deleting students, see *"Deleting Students from the Session Student List" on page 101*.

Sending Students from Waiting List to the Student List

If there are students on the waiting list, you can override the maximum number of available seats to add them to a session.

To Send Students from the Waiting List to the Student List

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the link for the appropriate session-based learning unit.

The learning unit displays with the **General Info** tab selected.

3 Click the **Sessions** tab.

The session list for the learning unit displays.

4 From the session list, click the appropriate session.

The details for the session you selected appear in the lower part of the window.

5 Click the **Waiting List** tab.

The list of students currently on the waiting list appears in the lower part of the window.

6 Select the check box(es) next to the student(s) you want to send to the student list.

7 Click the **Send to Student List** button.

The student(s) is (are) added to the student list. Note that the number of students shown in the **Enrolled** column will be larger than the maximum class size for the session.

Adding Notes Regarding Students

You can add notes for a student on the student list or on the student list for a session. These notes can be viewed by anyone who has access to the learning unit.

The notes window also displays information on the status, who initiated the learning, results, and approval information.

To Add a Note for a Student

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the link for the appropriate learning unit.

The learning unit displays with the **General Info** tab selected.

3 Do either of the following:

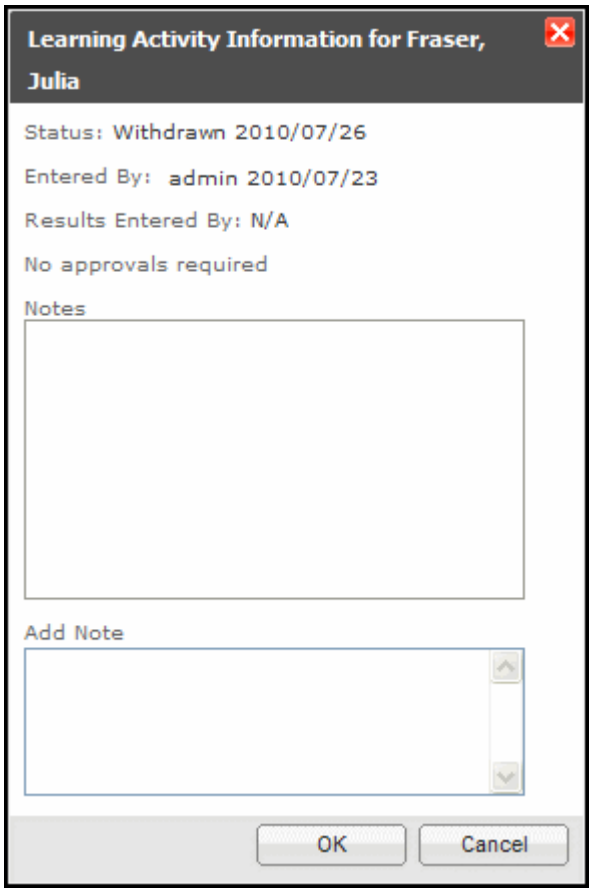
- To add a note for a student on the student list for the learning unit, click the **Students** tab.

OR

- To add a note for a student from a specific session, click the **Sessions** tab, then click the session, and then click the **Student List** tab.

4 Click the student for whom you want to add a note.

The **Learning Activity Information for {employee name}** displays.



5 In the **Add Note** area, enter the note.

6 Click the **OK** button.

Chapter 8

Working with Learning Requests

This section discusses approving or denying of *eLearning Manager* learning requests, and it also details how to add and view notes associated with these requests.

The section topics are as follows:

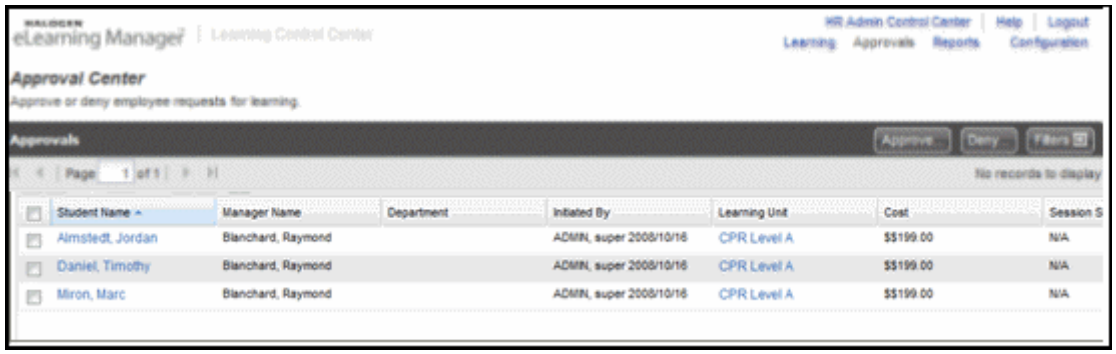
- *"About Approving and Denying Learning Requests" on page 114*
- *"Approving or Denying Requests for Learning" on page 116*
- *"Skipping Approvals" on page 119*
- *"Adding a Note to Learning Requests" on page 121*
- *"Viewing Notes Associated with Learning Requests" on page 122*

About Approving and Denying Learning Requests

All learning units are assigned an approval policy when they are created. Normally, specific roles will be responsible for approving learning requests, but learning units can also be configured with a policy of "no approval required." When the policy of "no approval required" is applied to a learning unit, any employee can enroll in the learning without intervention from anyone else.

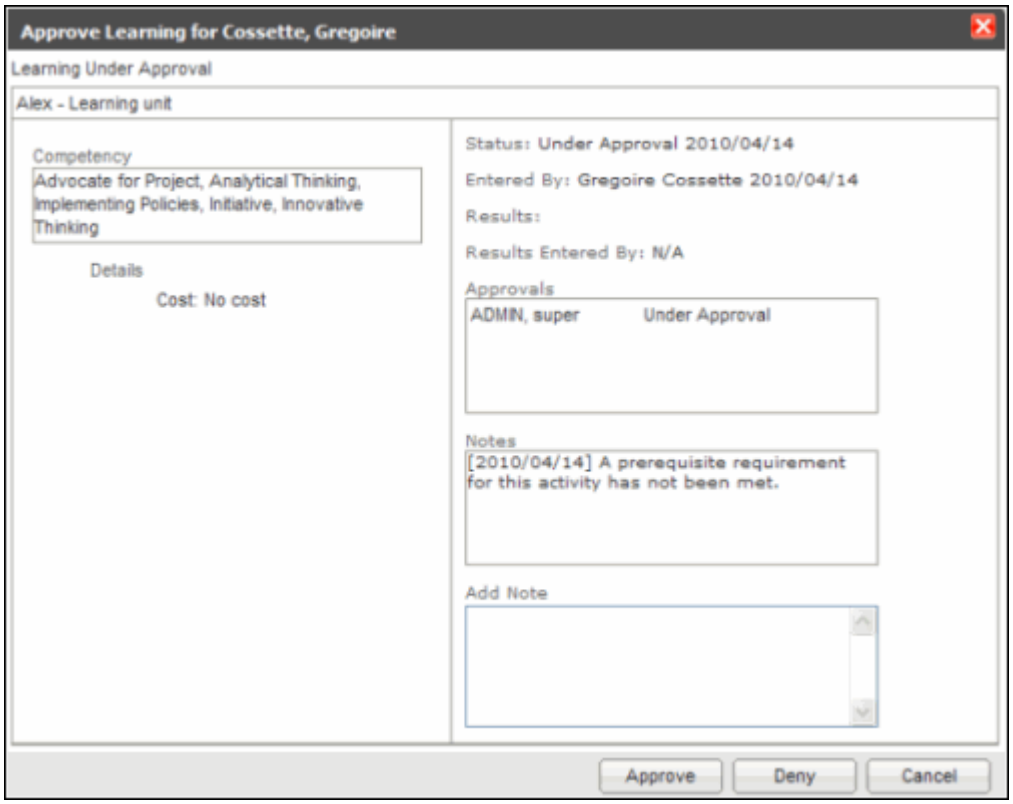
The approval policies are configured on the Configuration page in the Learning Control Center. For more information on setting up approval policies, see *"About Approval Policies" on page 126*.

As an administrator, you may be required to approve or deny requests for learning. If you have learning requests to approve, a list of students appears in the Learning Control Center on the Approvals page (see below).

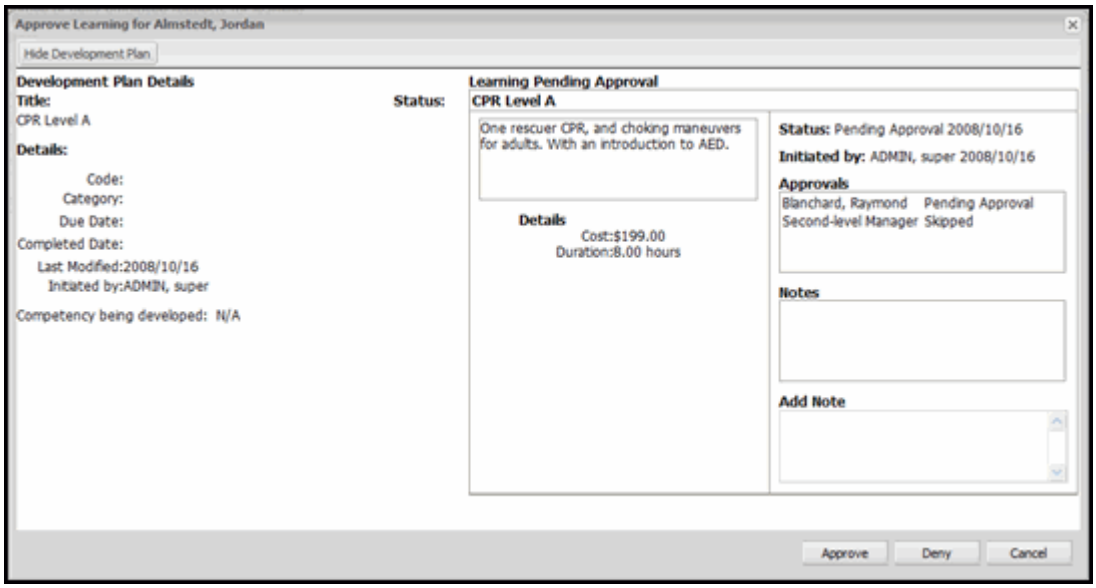


The list is arranged alphabetically, and only students with a status of "Under Approval" appear on the list. If a student has more than one learning activity waiting to be approved, then their name will appear on the list more than once, once for each activity. From this screen, you can quickly approve or deny requests for learning for several students at once. For more information on approving learning this way, see *"Adding a Note to Learning Requests" on page 121*.

If you want to view the details of the learning unit associated with the learning request before you approve or deny it, you can click on the student's name to view such things as a description of the learning unit; competencies associated with it; other details such as the cost, the duration, and who initiated it; and any notes associated with the learning request (see below).



Furthermore, if you are a Manager, HR Representative, Learning and Development Specialist, or if you have secondary manager access or higher level manager access, you can view the details of the associated development plan that contains the learning activity (see below).



You can also approve or deny the request for learning from this window. For more information, see *"Approving or Denying Learning Requests for Individual Employees" on page 118*.

Approving or Denying Requests for Learning

Depending on your role, you may be asked to approve or deny a student's learning request. There are two ways to do this. See either of the following methods:

- *"Adding a Note to Learning Requests" on page 121*
- *"Approving or Denying Learning Requests for Individual Employees" on page 118*

Note that you must add a note if you deny a request for learning, regardless of the method you used to deny the request. For more information, see *"Adding a Note to Learning Requests" on page 121*.

Approving or Denying Learning Requests for Several Employees at Once

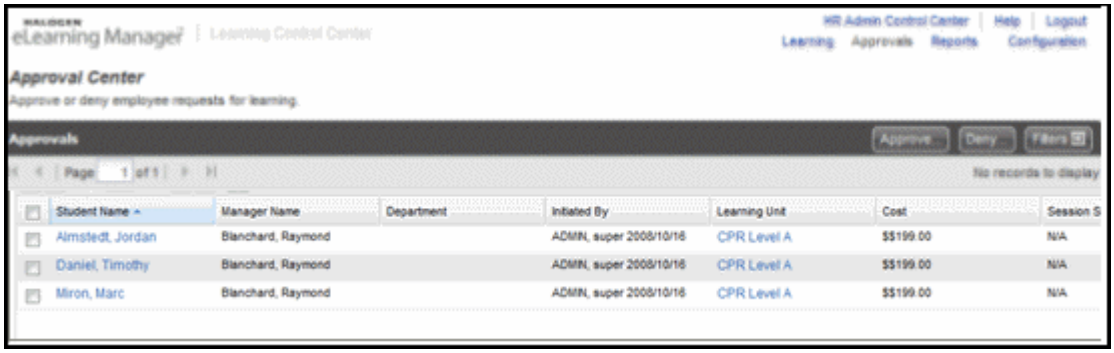
If you have many learning requests, you can approve or deny several of them at once. Use this method if you do not need to see the details of the learning unit and you just want to quickly approve or deny several requests at once.

Employees are listed in alphabetical order, and only employees with a status of "Under Approval" will appear in this list. In addition, employees will appear in the list once for each learning activity. For example, if John Smith has three approvals for three learning activities, his name will appear in the list three times. After you approve or deny the learning request, the employee disappears from the Approval Center list.

To Approve or Deny Learning Requests for Several Employees at Once

1 From the **Learning Control Center**, click the **Approvals** link.

The **Approval Center** window appears showing a list of employees with learning requests for you to approve or deny.



2 (Optional) If you want to filter the list of employees, click the **Filters** button to show the available filters, and then use the drop-down lists to narrow the list of employees.

Tip: If you want to view the details of the learning unit, click the link for the learning unit in the **Learning Unit** column.

3 Select the check box(es) next to the employee(s) whose learning you want to approve or deny.

4 Do either of the following:

- Click the **Approve...** button, then, if required, add a note in the **Add Note** area, and then click the **OK** button.
- Click the **Deny...** button, then add a note in the **Add Note** area indicating why you want to deny the learning request, and then click the **OK** button.

Approving or Denying Learning Requests for Individual Employees

When you approve or deny a request for learning for individual employees, you can view details about the request for learning—such as a description of the learning, competencies associated with it, and so forth—and you can view the development plan details (if applicable).

After you approve or deny the learning request, the employee disappears from the Approval Center list.

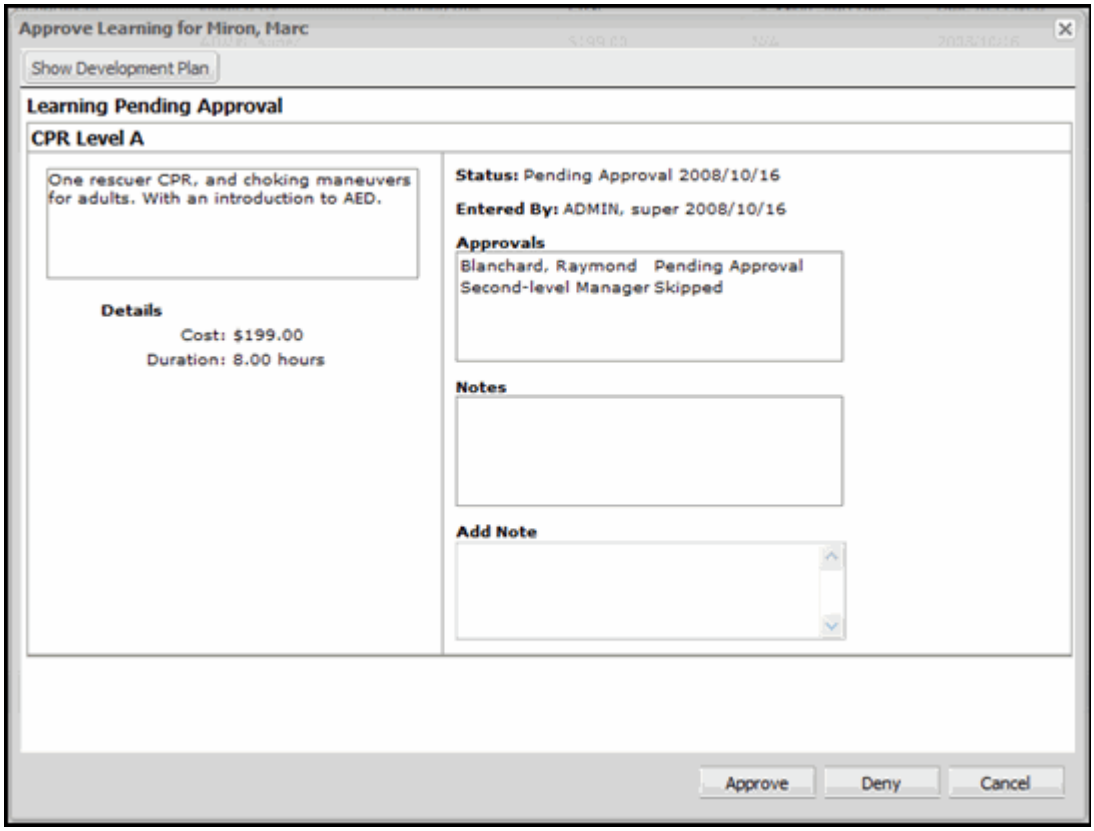
To Approve or Deny Learning Requests for Individual Employees

1 From the **Learning Control Center**, click the **Approvals** link.

The **Approval Center** window appears showing a list of employees with learning requests for you to approve or deny.

2 Click the link for the employee whose learning you want to approve or deny.

The **Approve Learning** window displays.



3 (Optional) If you want to view the development plan details associated with the learning activity, click the **Show Development Plan** button.

4 Do either of the following:

- If required, enter text in the **Add Note** area, and then click the **Approve** button.
- Enter a note in the **Add Note** area indicating why you want to deny the learning, and then click the **Deny** button.

Skipping Approvals

In certain circumstances, you may find that you need to skip an approver. For example, suppose an approver is on an extended vacation or has a prolonged illness. In this situation, you could skip the absent approver and move the approval responsibility to the next approver in the list. If you skip the final approver in the list, the student's status changes from "Under Approval" to "Enrolled."

Note that you must have a Super User, Learning Administrator, Catalog Manager, or Enrollment and Session Manager roll to skip an approval. For more information on these *eLearning Manager* roles, see *"About eLearning Manager Roles" on page 3*.

To Skip an Approval

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

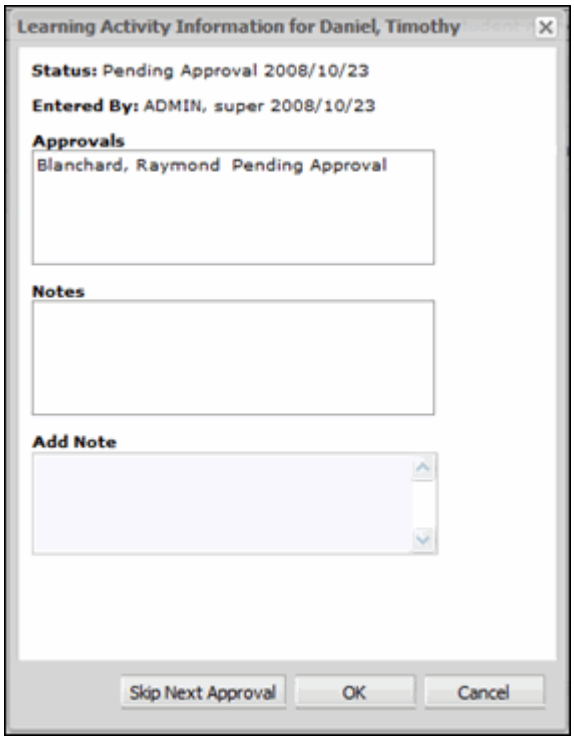
2 Click the link for the learning unit containing the approval you want to skip.

3 Click the **Students** tab.

The list of students associated with the learning units displays.

4 Click the link for the employee whose approval you want to skip.

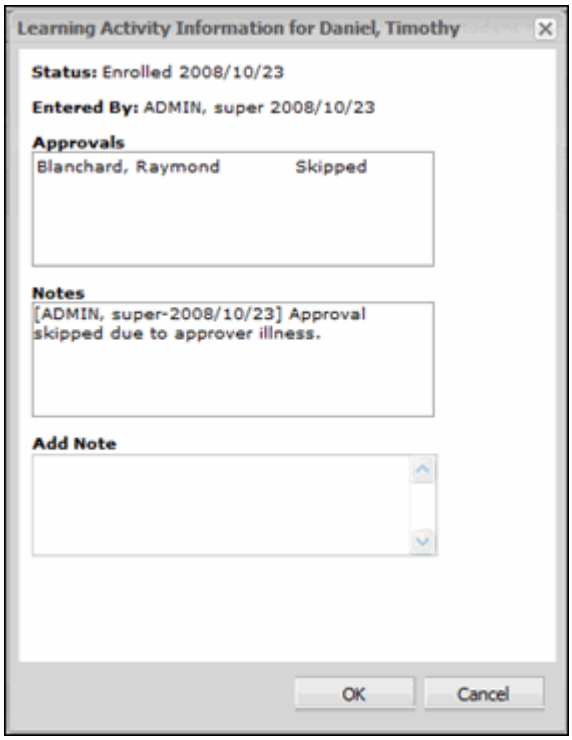
The **Learning Activity Information for [employee name]** window displays.



5 Enter a note in the **Add Note** field, and then click the **Skip Next Approval** button.

6 Click the **OK** button.

Tip: Click the employee name link in the student list to view the approval history and view any notes. When an approval is skipped, the approval history indicates this, and the note entered appears in the **Notes** area.



Adding a Note to Learning Requests

If you are assigned to approve or deny a learning requests, you might want to add a note to it. For example, you could add a note to explain why you chose to approve the learning request or why you chose to deny the request. Note, however, that you must add a note if you deny a request for learning.

If you add a note while approving or denying several learning requests at once, the note applies to all of the students you selected.

To Add a Note to a Learning Request

1 Open an individual learning request.

For more information, see *"Approving or Denying Learning Requests for Individual Employees" on page 118*.

2 In **Add Note** area, enter the note.

3 Do either of the following:

- Click the **Approve** button.
- Click the **Deny** button.

The note appears in the **Notes** area.

Viewing Notes Associated with Learning Requests

Notes can be added by anyone who has access to the learning unit. For example, a student may add a note indicating why he/she chose the learning, or a manager may create a note to indicate why he/she denied a learning request.

To View Notes Associated with a Learning Request

1 Open an individual learning request.

For more information, see *"Approving or Denying Learning Requests for Individual Employees" on page 118*.

2 Read the note(s) in the **Notes** area.

3 (Optional) Enter your own note in the **Add Note** area.

4 Do either of the following:

- Click the **Approve** button.
- Click the **Deny** button.

Chapter 9

Learning Options

Chapter Scope

This section introduces Learning Options. The four available Learning Options that can be configured are Approval Policies, Regions, Professional Credits and Learning Types. You can create, view, sort, edit, and delete Learning Options.

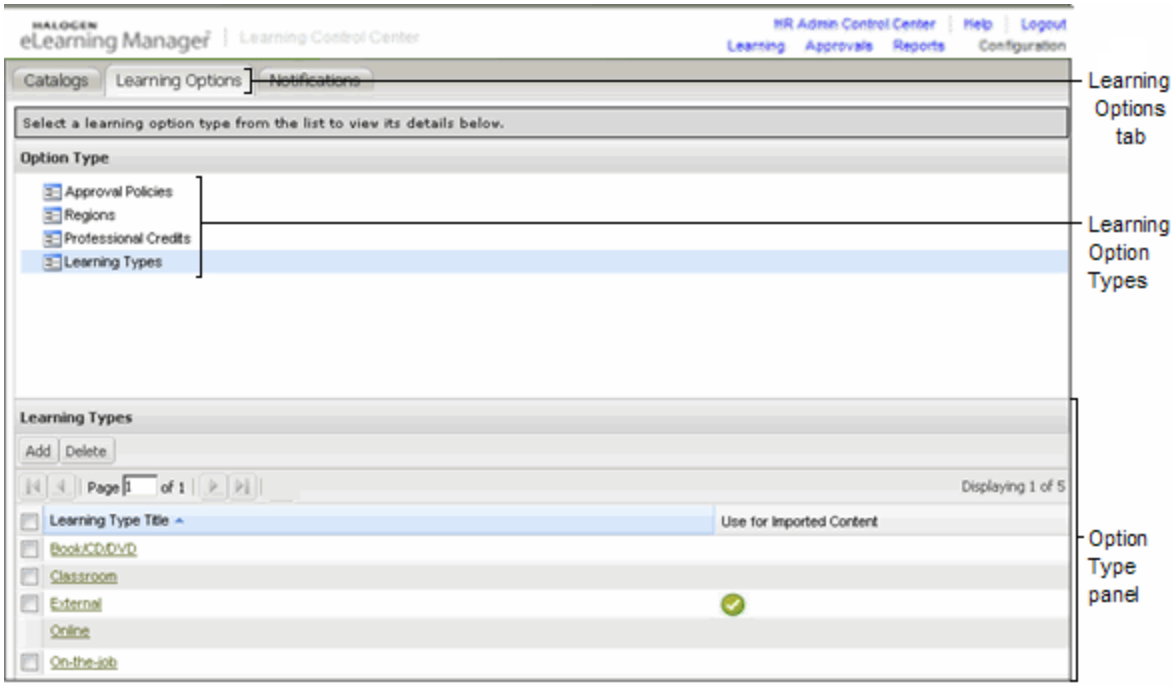
The section topics are as follows:

- *"Configuring Learning Options" on page 124*
- *"Viewing and Sorting Learning Option Lists" on page 125*
- *"About Approval Policies" on page 126*
- *"About Regions" on page 132*
- *"About Professional Credits" on page 135*
- *"About Learning Types" on page 138*

Configuring Learning Options

The four available Learning Options that can be configured are Approval Policies, Regions, Professional Credits and Learning Types.

- Approval Policies are used to specify approver(s) who will approve learning enrollment
- Regions are used to group and identify learning units where geographic availability may be a consideration
- Professional Credits are used to define the type of credits earned when a student completes a learning unit
- Learning Types are used to describe the method in which a learning unit is delivered



Learning Administrators and Super Users can manage all aspects of Learning Options including; creating, viewing, sorting, editing, and deleting.

The use of Learning Options provides a method of maintaining important attributes associated with learning units and scheduled sessions, as well as offering a way for employees to filter various aspects of learning units and calendars.

The Configuration area of the Learning Control Center will present you with the Learning Options tab. You must first select an option type, and then the lower panel will display any attributes of the selected option type. From the option type panel you can add, edit, delete and navigate the option type list.

For more information on configuring Learning Options, see any of the following:

- *"Viewing and Sorting Learning Option Lists" on page 125*

- *"About Approval Policies" on page 126*
- *"About Regions" on page 132*
- *"About Professional Credits" on page 135*
- *"About Learning Types" on page 138*

Viewing and Sorting Learning Option Lists

Viewing the Learning Option details provides you with more information about the individual option such as the title, default or non default status, approver lists, professional credit descriptions, and use for imported content status, where applicable.

You can sort the various Learning Option lists in ascending or descending order by clicking on any of the available column headers. For example, you can click on the "Default" column of a Regions list, the list will display the option type with the status of "Default" at the top of the list.

Each list can display a maximum of 20 entries per page, and you can navigate forward and backwards through the pages and jump directly to the first and last pages of the entire list.

To View Learning Option Details

1 From the **Learning Control Center**, click the **Configuration** link.
The **Catalogs** page displays.

2 Click the **Learning Options** tab, then from the **Option Type** list select a **Learning Option**.
The selected **Learning Option List** displays in the lower panel.

3 To view details, click the **Title** link of the **Learning Option** you want to view.
The selected **Learning Option Details** pop-up opens.

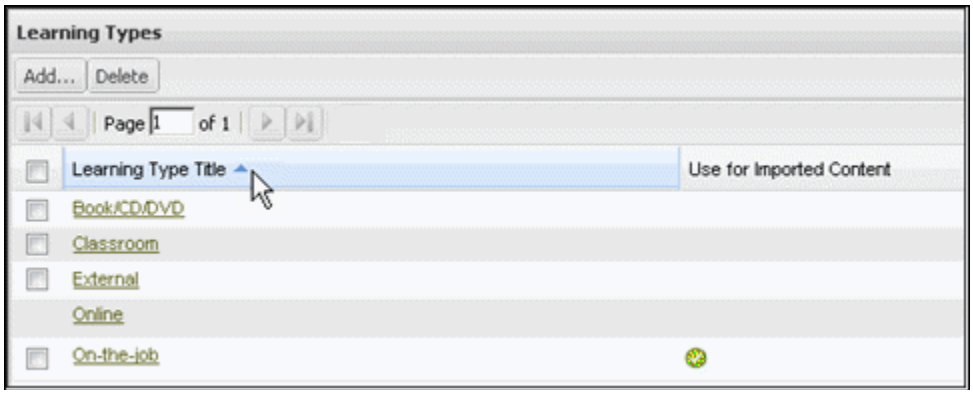
4 Click the **OK** or **Cancel** button.
The **Learning Option Details** pop-up closes.

To Sort Learning Option Lists

1 To sort a **Learning Options** list, click the **Column Header** for the column you want to sort.

The sorting arrow indicates the ascending or descending sorting direction.

- Click the same column header again to sort in the opposite direction.



The entire list of a multiple page list will be sorted, and not just the currently displayed page.

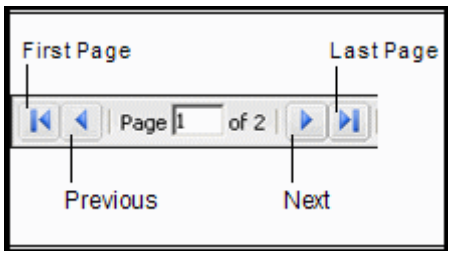
NOTE: With the Approval Policies option list, the **Approver list** column cannot be sorted.

To Navigate Learning Option Lists

1 When the list exceeds one page, use the **Page Navigation** buttons to move through pages.

Each page displays a maximum of 20 entries.

- The **Page Navigation** toolbar is comprised of the following icon driven features:



About Approval Policies

Approval Policies are used to specify approver(s) who are required to approve learning enrollment requests for certain learning activities. Learning Administrators and Super Users can manage all aspects of Approval Policies including; creating, viewing, sorting, editing and deleting.

A “No Approval Required” policy is generated by the system automatically, and may be used for any learning enrollment requests that do not require approval. You can modify the title of this policy, but it cannot be deleted.

An approval policy will specify who can approve or decline a request for learning enrollment and the approval sequence. Approvers may be selected as a specific individual or from a preconfigured list of roles such as the sample list below:

- Career Coach
- HR Rep
- Learning and Development Manager
- Manager (Direct)
- Second-level Manager

All learning units must have an associated Approval Policy, and if no policy is selected then the default policy will be automatically assigned.

Learning units that require approval will be indicated as such along with a display of who is required to grant approval.

Once an approval has been authorized the student will be automatically enrolled, pending all approval requirements have been made, and availability of the learning unit is confirmed.

For more information on configuring Approval Policies, see any of the following:

- *"Adding Approval Policies" on page 127*
- *"Editing Approval Policies" on page 130*
- *"Deleting Approval Policies" on page 132*

Adding Approval Policies

Learning Administrators and Super Users can create details of a new policy, such as the title, adding and ordering the list of approvers, and change the default setting of the policy.

You can create policy specific Approver Lists by selecting approvers by role types or specific individuals. When adding individuals to the approver list, you may choose from any active employees in the User Center. The list of approvers is configured to reflect the approval sequence.

A "No Approval Required" policy is created automatically by the system, and cannot be deleted.

To Add an Approval Policy

1 From the **Learning Control Center**, click the **Configuration** link.

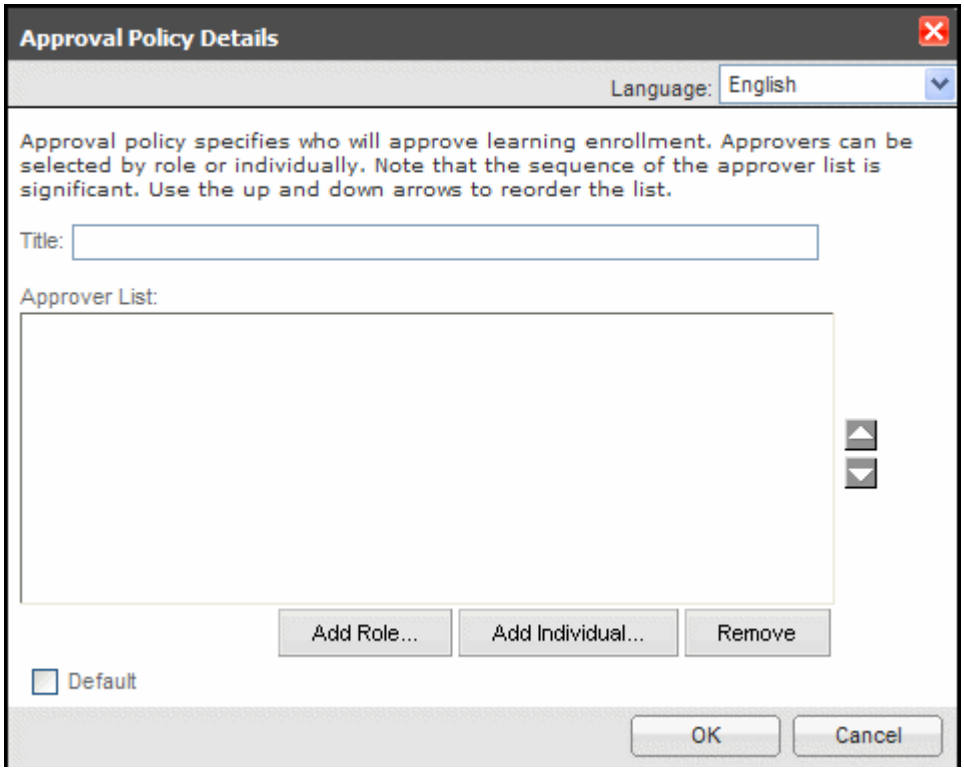
The **Catalogs** page displays.

2 Click the **Learning Options** tab, then from the **Option Type** list click **Approval Policies**.

The **Approval Policies** panel displays.

3 Click the **Add...** button.

The **Approval Policy Details** pop-up opens.



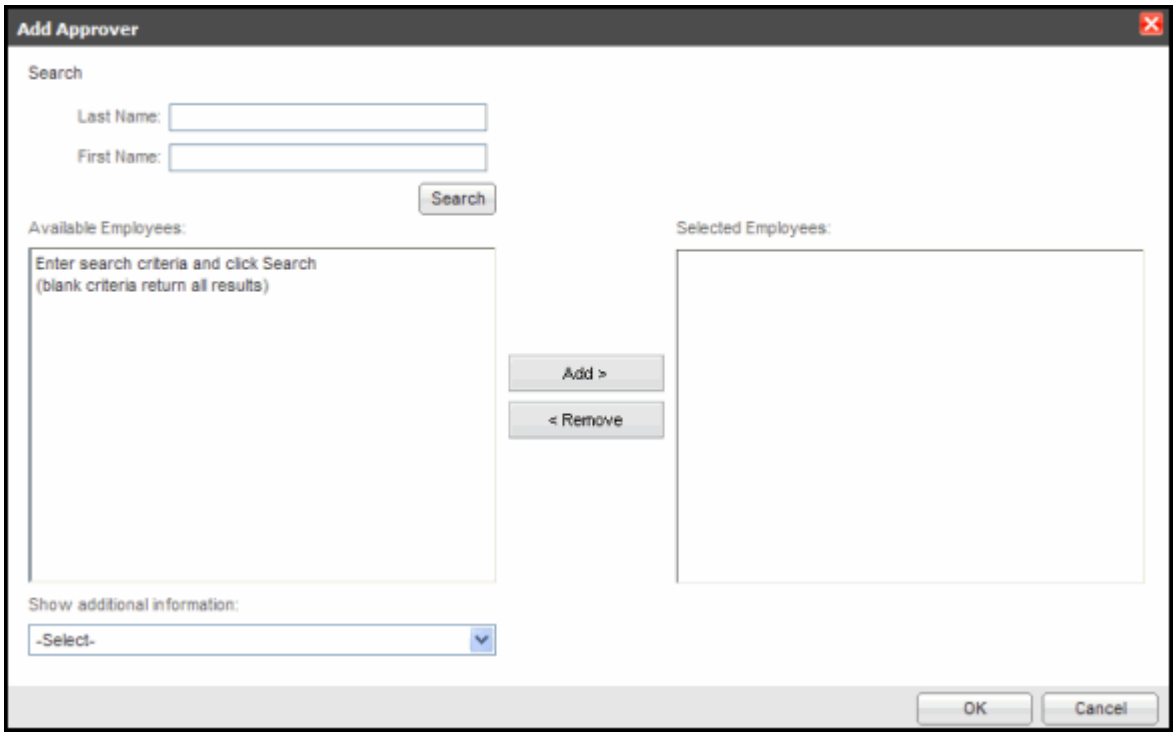
4 In the **Title** field, enter a title for the approval policy.

Policy titles must be unique and can be up to 200 characters in length.

NOTE: You can enter language specific titles using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

5 To add a specific individual as an approver, click the **Add Individual...** button.

The **Add Approver** pop-up opens.



- The employee list includes all active employees currently in the User Center, excluding those already selected as approvers.

6 Enter the first letter(s) of a name in the **Last Name** or **First Name** fields and click the **Search** button.

- The more letters you enter the more precise the search results will be.

NOTE: To reset the list, clear the **Last Name** and **First Name** fields and click the **Search** button.

7 Select a name from the **Available Employees** list and click the **Add >** button.

The name will appear in the **Selected Employees** list.

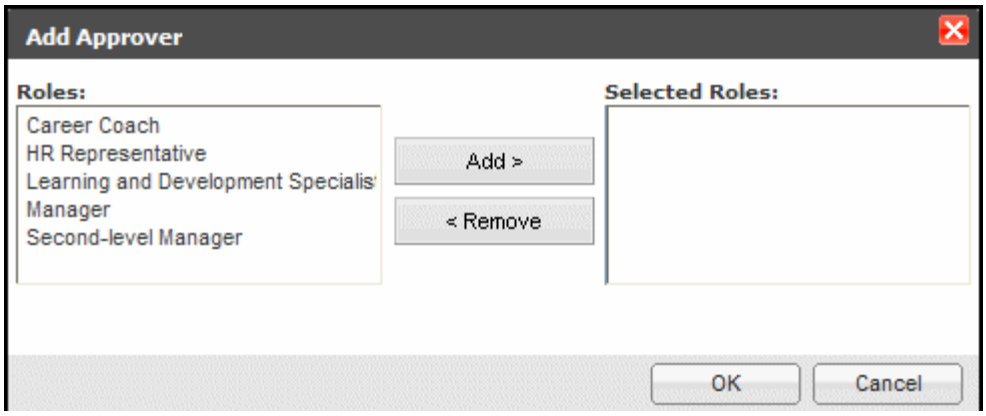
- Optionally you can select from the **Show additional information** drop-down list, which can be helpful when you have employees with similar or duplicate names.

8 Click the **OK** button when selection(s) have been made.

You are returned to the **Approval Policy Details** pop-up.

OR To add an approver by role, click the **Add Role...** button.

The **Add Approver** pop-up opens.



Select from the **Roles** list and click the **Add >** button.

- The selected approver(s) will appear in the **Selected Roles** list.
- Each role must be added or removed separately.

When complete, click the **OK** button.

- You are returned to the **Approval Policy Details** pop-up.

NOTE: To remove an approver from the list, select an approver and click the **< Remove** button.

9 To change the approval sequence, select the approver and use the **Up/Down** arrow buttons.

Only one approver can be selected and reposition at a time.

10 To set the approval policy as your default, select the **Default** check box.

If another policy is already set as the default, then the original will lose its default status.

11 Click the **OK** button.

Editing Approval Policies

Learning Administrators and Super Users can edit details of a policy, such as the title, add, remove or reorder the list of approvers, and change the default setting of the policy.

The "No Approval Required" policy is created automatically by the system, and while the title can be edited, this policy cannot be deleted.

To Edit an Approval Policy

1 From the **Learning Control Center**, click the **Configuration** link.

The **Catalogs** page displays.

2 Click the **Learning Options** tab, then from the **Option Type** list click **Approval Policies**.

The **Approval Policies** panel displays.

3 Click the **Title** link of the **Approval Policy** you want to edit.

The **Approval Policy Details** pop-up opens.

4 Edit the **Title** field as required.

Policy titles must be unique and can be up to 200 characters in length.

NOTE: You can enter language specific titles using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

5 To add a specific individual as an approver, click the **Add Individual...** button.

The **Add Approver** pop-up opens.

NOTE: The employee list includes all active employees currently in the User Center, excluding those already selected as approvers.

6 Enter the first letter(s) of a name in the **Last Name** or **First Name** fields and click the **Search** button.

- The more letters you enter the more precise the search results will be.

NOTE: To reset the list, clear the **Last Name** and **First Name** fields and click the **Search** button.

7 Select an approver and click the **Add >** button.

The name will appear in the **Selected Employees** list.

- Optionally you can select from the **Show additional information** drop-down list, which can be helpful when you have employees with similar or duplicate names.

8 Click the **OK** button when complete.

You are returned to the **Approval Policy Details** pop-up.

OR To edit the **Approver List** by adding a role, click the **Add Role...** button.

The **Add Approver** pop-up opens.

NOTE: Roles already added will not appear in the **Roles** list.

Select from the **Roles** list and click the **Add >** button.

- The selected approver(s) will appear in the **Selected Roles** list.
- Each role must be added or removed separately.

When complete, click the **OK** button.

- You are returned to the **Approval Policy Details** pop-up.

9 To remove an approver from the list, select an approver and click the **Remove** button.

The selected approver is removed from the list.

10 To change the approval sequence, select the approver and use the **Up/Down** arrow buttons.

Only one approver can be selected and repositioned at a time.

11 To set the approval policy as your default, select the **Default** check box.

If another policy is already set as the default, then the original will lose its default status.

12 Click the **OK** button.

Deleting Approval Policies

The Learning Administrator or Super Users can maintain Approval Policies by deleting any unused policies. Attempting to delete Approval Policies that are in use by any learning unit will produce a warning message. Proceeding with the deletion will cause the learning unit to be linked to the default policy. The default policy cannot be deleted.

The "No Approval Required" policy is created automatically by the system, and cannot be deleted.

To Delete an Approval Policy

1 From the **Learning Control Center**, click the **Configuration** link.

The **Catalogs** page displays.

2 Click the **Learning Options** tab, then from the **Option Type** list click **Approval Policies**.

The **Approval Policies** panel displays.

3 Select the check box next to the **Approval Policies** you want to delete.

To select all available check boxes, use the check box to the left of the **Title** column.

NOTE: The default, and "*No Approval Required*" policy cannot be deleted.

4 Click the **Delete** button.

A confirmation pop-up opens.

NOTE: You will be warned when deleting a policy in use by a learning unit. Deleting it will cause the learning unit to be linked to the default policy.

5 Click the **OK** button to confirm.

About Regions

Regions can be used to group and identify learning units where geographic availability may be a consideration. Learning Administrators and Super Users can manage all aspects of Regions including; creating, viewing, sorting, editing and deleting.

With a pre-configured list of Regions, employees can easily filter for learning units based on geographic locations, from the Learning Search and Calendar pages.

The Region list includes all of the areas that are available for association with the learning units that may be accessed.

For more information on configuring Regions, see any of the following:

- *"Adding Regions" on page 133*
- *"Editing Regions" on page 134*
- *"Deleting Regions" on page 134*

Adding Regions

Regions can be used to group and identify learning units where geographic availability may be a consideration. Learning Administrators and Super Users can create new Regions. These new Regions can be added to include a title, and a default or non default status.

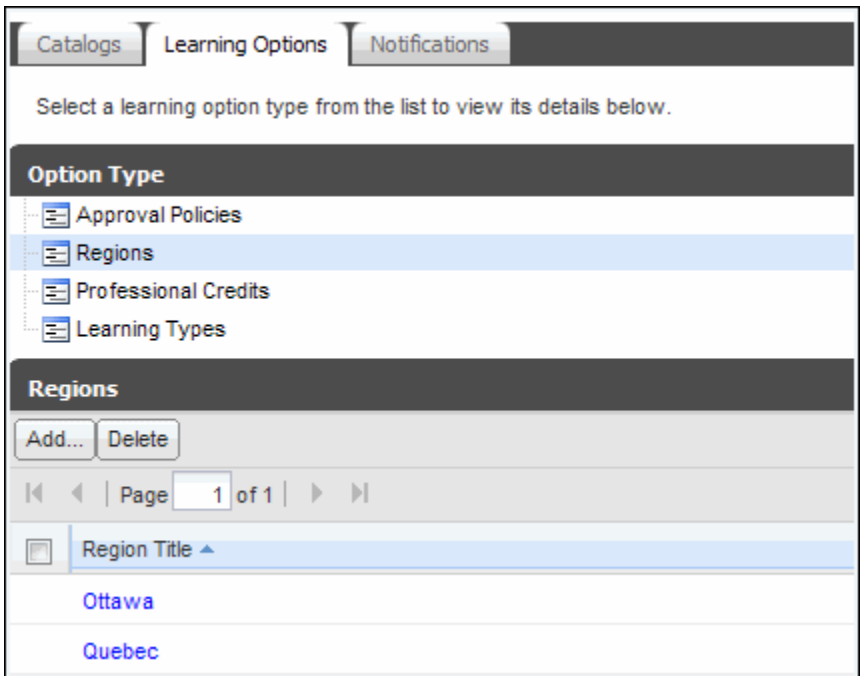
To Add a Region

1 From the **Learning Control Center**, click the **Configuration** link.

The **Catalogs** page displays.

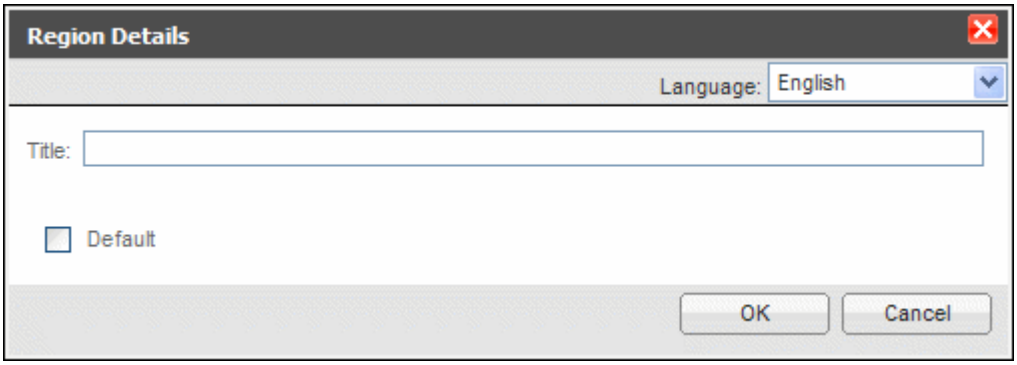
2 Click the **Learning Options** tab, then from the **Option Type** list click **Regions**.

The **Regions** panel displays.



3 Click the **Add...** button.

The **Region Details** pop-up opens.



4 In the **Title** field, enter a title for the region.

Region titles must be unique and can be up to 200 characters in length.

NOTE: You can enter language specific titles using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

5 Select or clear the **Default** check box.

Checking this box will set the region as the default.

NOTE: If another region is already set as the default, then the original will lose its default status.

6 Click the **OK** button.

Editing Regions

If you need to edit a Region that has already been created, you can do so from the Learning Options page. Learning Administrators and Super Users can edit details of a Region, such as the title, and the default or non default status of the selected Region.

To Edit a Region

1 From the **Learning Control Center**, click the **Configuration** link.

The **Catalogs** page displays.

2 Click the **Learning Options** tab, then from the **Option Type** list click **Regions**.

The **Regions** panel displays.

3 Click the **Title** link of the **Region** you want to edit.

The **Region Details** pop-up opens.

4 Edit the **Title** field as required.

Region titles must be unique and can be up to 200 characters in length.

NOTE: You can enter language specific titles using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

5 Select or clear the **Default** check box.

Checking this box will set the region as the default.

NOTE: If another region is already set as the default, then the original will lose its default status.

6 Click the **OK** button.

Deleting Regions

The Learning Administrator or Super Users can manage types by deleting from the Regions list, unless it is the default Region. Also Regions that are being referenced by any learning unit, learning path, or certification cannot be deleted.

To Delete a Region

1 From the **Learning Control Center**, click the **Configuration** link.
The **Catalogs** page displays.

2 Click the **Learning Options** tab, then from the **Option Type** list click **Regions**.
The **Regions** panel displays.

3 Select the check box next to the **Region(s)** you want to delete.
To select all available check boxes, use the check box to the left of the **Title** column.
NOTE: The default and regions that are in use are not available to be selected for deletion.

4 Click the **Delete** button.
A confirmation pop-up opens.

5 Click the **OK** button to confirm.

About Professional Credits

Professional Credits are used to define the type of credits earned when a student completes a learning unit, e.g., Professional Development Units (PDU), Continuing Education Units (CEU). Learning Administrators and Super Users can configure all aspects of Professional Credits including: creating, viewing, sorting, editing, and deleting.

Any learning unit may have one type of Professional Credit associated with it. When a course is completed successfully, any Professional Credit associated with the learning unit will be awarded to the student, and stored for future reference.

Once a list of Professional Credits has been configured, one of these types may be applied as an attribute of a learning unit. These credits will be available in various views of the system, and can be set from the Results tab of the particular learning unit. Professional Credits earned will display in Training Report and Transcript areas.

For more information on configuring Professional Credits, see any of the following:

- *"Adding Professional Credits" on page 135*
- *"Editing Professional Credits" on page 137*
- *"Deleting Professional Credits" on page 138*

Adding Professional Credits

Professional Credits are used to define the type of credits earned when a student completes a learning unit. Learning Administrators and Super Users can create new Professional Credits. These new credits can be added to include a title, description, and a default or non default status.

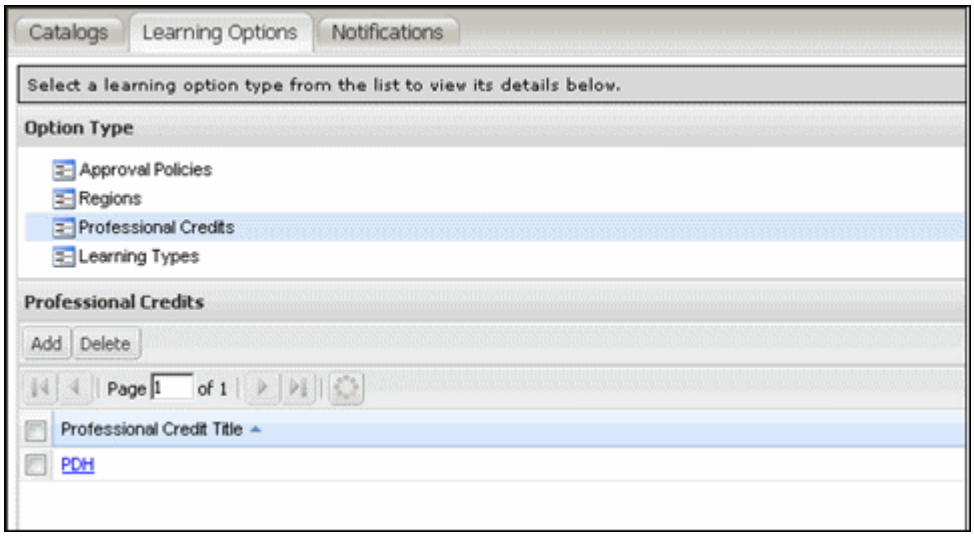
To Add a Professional Credit

1 From the **Learning Control Center**, click the **Configuration** link.

The **Catalogs** page displays.

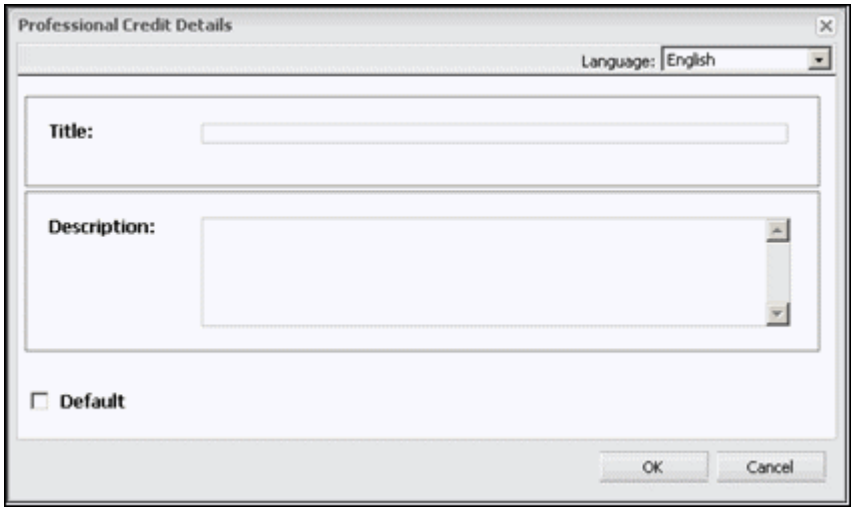
2 Click the **Learning Options** tab, then from the **Option Type** list click **Professional Credits**.

The **Professional Credits** panel displays.



3 Click the **Add...** button.

The **Professional Credit Details** pop-up opens.



4 In the **Title** field, enter a title for the professional credit.

Professional credit titles must be unique and can be up to 200 characters in length.

NOTE: You can enter language specific titles using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

5 In the **Description** field, enter a description for the professional credit.

Text entered here is saved as the **Professional Credit** type's description.

NOTE: This is not a required field, and can hold a maximum of 2000 characters.

6 Select or clear the **Default** check box.

Checking this box will set the credit as the default.

NOTE: If another credit is already set as the default, then the original will lose its default status

7 Click the **OK** button.

Editing Professional Credits

If you need to edit a Professional Credit that has already been created, you can do so at any time from the Learning Options page. Learning Administrators and Super Users can edit details of a Professional Credit, such as the title, description, and the default or non default status of the selected credit.

To Edit a Professional Credit

1 From the **Learning Control Center**, click the **Configuration** link.

The **Catalogs** page displays.

2 Click the **Learning Options** tab, then from the **Option Type** list click **Professional Credits**.

The **Professional Credits** panel displays.

3 Click the **Title** link of the **Professional Credit** you want to edit.

The **Professional Credit Details** pop-up opens.

4 Edit the **Title** field as required.

Professional credit titles must be unique and can be up to 200 characters in length.

NOTE: You can enter language specific titles using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

5 Edit the **Description** field as required.

Text entered here is saved as the **Professional Credit** type's description.

NOTE: This is not a required field, and can hold a maximum of 2000 characters.

6 Select or clear the **Default** check box.

Checking this box will set the credit as the default.

NOTE: If another credit is already set as the default, then the original will lose its default status.

7 Click the **OK** button.

Deleting Professional Credits

The Learning Administrator or Super Users can manage types by deleting credits from the Professional Credits list, unless it is the default credit. Also credits that are being referenced by any learning unit, learning path, or certification cannot be deleted. Only Professional Credit types that are not used by a learning unit can be deleted.

To Delete a Professional Credit

1. From the **Learning Control Center**, click the **Configuration** link.
   The **Catalogs** page displays.
2. Click the **Learning Options** tab, then from the **Option Type** list click **Professional Credits**.
   The **Professional Credits** panel displays.
3. Select the check box next to the **Professional Credit(s)** you want to delete.
   To select all available check boxes, use the check box to the left of the **Title** column.
   NOTE: The default and credits that are in use are not available to be selected for deletion.
4. Click the **Delete** button.
   A confirmation pop-up opens.
5. Click the **OK** button to confirm.

About Learning Types

Learning Types are used to describe the method in which a learning unit is delivered. Learning Administrators and Super Users can configure all aspects of Learning Types including: creating, viewing, sorting, editing, and deleting.

For your convenience, the following five Learning Types are created automatically:

- Classroom
- External
- On-the-Job
- Online
- Book/CD/DVD

This list can be changed in any way you wish. However, there must be at least one Learning Type configured, so that the list is never empty. The “Online” Learning Type is set by default as the type for use with imported course content. There must be one type that is configured to be the equivalent of this “Online” Learning Type.

Once a list of Learning Types has been configured, one of these types must be applied as an attribute for each learning unit. A “Type” drop-down list will be available in various views of the system and is useful when searching for particular learning components.

For more information on configuring Learning Types, see any of the following:

- *“Adding Learning Types” on page 139*
- *“Editing Learning Types” on page 140*
- *“Deleting Learning Types” on page 141*

Adding Learning Types

Learning Types are used to describe the method in which a learning unit is delivered. Five Learning Types are created automatically, however Learning Administrators and Super Users can create new Learning Types to be added to this automatically created list.

To Add a Learning Type

1 From the **Learning Control Center**, click the **Configuration** link.

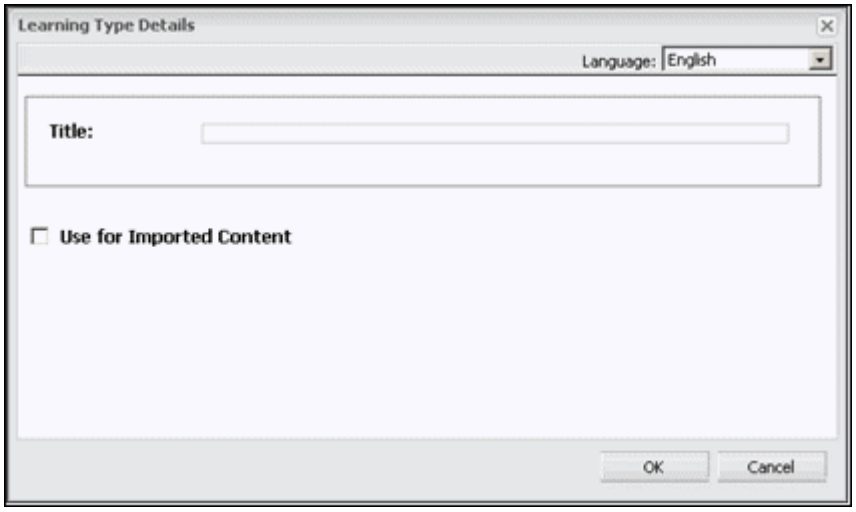
The **Catalogs** page displays.

2 Click the **Learning Options** tab, then from the **Option Type** list click **Learning Types**.

The **Learning Types** panel displays.

3 Click the **Add...** button.

The **Learning Type Details** pop-up opens.



4 In the **Title** field, enter a title for the learning type.

Learning type titles must be unique and can be up to 200 characters in length.

NOTE: You can enter language specific titles using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

5 To set a type for imported course content, select the **Use for Imported Content** check box.

The **Online** type is set by default as the type for imported content.

NOTE: There must be one learning type that is configured to be the equivalent of the **Online** type. If another type is set to be **Used for Imported Content** the original will lose this status.

6 Click the **OK** button.

Editing Learning Types

For your convenience a list of Learning Types was automatically created. This original list and any new items can be edited from the Learning Options page. Learning Administrators and Super Users can edit details of a Learning Type, such as the title, and whether the type should be used for imported content.

The "Online" Learning Type is set by default as the type associated with the learning content that will be run through the SCORM player. There must be one type that is configured to be the equivalent of this "Online" Learning Type.

To Edit a Learning Type

1 From the **Learning Control Center**, click the **Configuration** link.

The **Catalogs** page displays.

2 Click the **Learning Options** tab, then from the **Option Type** list click **Learning Types**.

The **Learning Types** panel displays.

3 Click the **Title** link of the **Learning Types** you want to edit.

The **Learning Type Details** pop-up opens.

4 Edit the **Title** field as required.

Learning type titles must be unique and can be up to 200 characters in length.

NOTE: You can enter language specific titles using the **Language** drop-down list, if the multilingual feature has been configured with available languages.

5 To set a type for imported course content, select the **Use for Imported Content** check box.

The **Online** type is set by default as the type for imported content.

NOTE: There must be one learning type that is configured to be the equivalent of the **Online** type. If another type is set to be **Used for Imported Content** the original will lose this status.

6 Click the **OK** button.

Deleting Learning Types

The Learning Administrator or Super Users can manage types by deleting any unused Learning Types. There must be at least one Learning Type configured, so that the list is never empty.

The “Online” Learning Type is set by default as the type associated with the learning content that will be run through the SCORM player. Any Learning Type that has been configured for “Use for Imported Content” cannot be selected for deletion.

To Delete a Learning Type

1 From the **Learning Control Center**, click the **Configuration** link.

The **Catalogs** page displays.

2 Click the **Learning Options** tab, then from the **Option Type** list click **Learning Types**.

The **Learning Types** panel displays.

3 Select the check box next to the **Learning Type(s)** you want to delete.

To select all available check boxes, use the check box to the left of the **Title** column.

NOTE: Learning types that are in use are not available to be selected for deletion. Also, the learning type set to be **Used for Imported Content** cannot be deleted.

4 Click the **Delete** button.

A confirmation pop-up opens.

5 Click the **OK** button to confirm.

Chapter 10

eLearning Manager Notifications

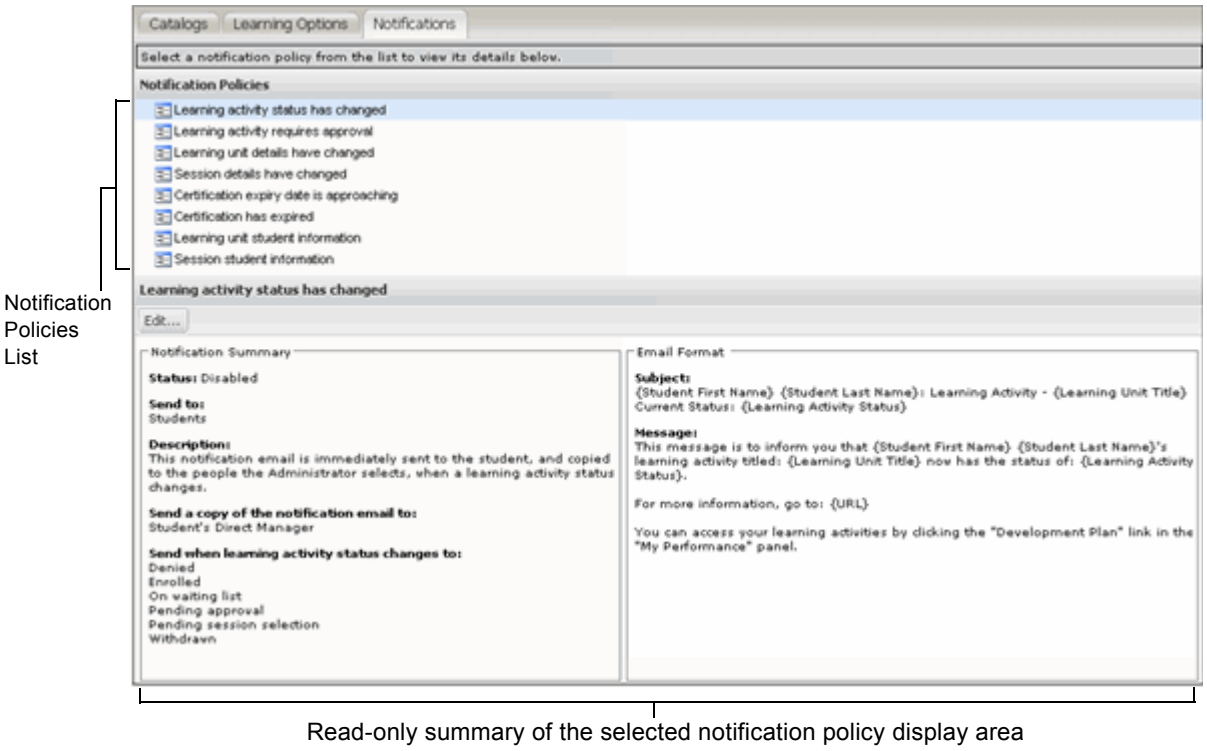
This section describes *eLearning Manager* notification policies and how to modify settings and customize the email message default text. You can configure notifications so that they are sent automatically when certain conditions are met, or you can send notifications manually.

The section topics are as follows:

- *"About eLearning Manager Notifications" on page 144*
- *"Enabling eLearning Manager Notifications" on page 145*
- *"Configuring eLearning Manager Notification Policies" on page 146*
- *"Sending eLearning Manager Notifications Manually" on page 148*
- *"Sending Notifications to Next Approvers" on page 150*

About eLearning Manager Notifications

eLearning Manager notifications are email messages sent to users such as students, instructors, Learning & Development Specialists, managers, and so forth. Notifications are optional, and they are governed by notification policies.



The top portion of the window contains the notification policies. If you click a notification policy, a detailed summary of the policy appears in the lower portion of the window. Then, you can click the **Edit** button to configure the policy. For more information on configuring these notification policies, see *"Configuring eLearning Manager Notification Policies" on page 146*

Note that only Learning Administrators and Super Users can view all notification policies. For more information on *eLearning Manager* roles, see *"About eLearning Manager Roles" on page 3*.

Some *eLearning Manager* notifications are sent out automatically by the system, while others are sent out manually. The following notifications are sent out automatically by the system:

- Learning activity status has changed
- Learning activity requires approval
- Certification expiry date is approaching
- Certification has expired

These notification policies will be sent via a scheduled agent at the configured mail send hour, which you can configure on the server options page.

You can send out the following types of notifications manually when necessary:

- Learning unit details have changed
- Session details have changed
- Learning unit student information
- Session student information

For more information on configuring these notification policies, see *"Sending eLearning Manager Notifications Manually" on page 148*.

Enabling eLearning Manager Notifications

By default, all notification policies are disabled, but you can enable any notification policy at any time. Once you have enabled a policy, you can use the default settings or you can configure them. For more information on configuring the settings, see *"Configuring eLearning Manager Notification Policies" on page 146*.

To Enable eLearning Manager Notifications

1. From the **Learning Control Center**, click the **Configuration** link.

   The **Catalogs** page displays.

2. Click the **Notifications** tab.

   The **Notifications** page displays.

3. In the **Notification Policies** area, click the policy you want to enable.

   The lower part of the **Notifications** updates to reflect the policy you selected.

4. Click the **Edit...** button.

   A new window displays for the policy you selected.

5. Select the **Enable this policy** check box.

6. Click the **OK** button.

   The notification policy is now enabled. If required, you can configure the policy to suit your needs. See *"Configuring eLearning Manager Notification Policies" on page 146* for more information.

Configuring eLearning Manager Notification Policies

By default, all notification policies are disabled, but you can enable any notification policy at any time. For more information on enabling notifications, see *"Enabling eLearning Manager Notifications" on page 145*.

When you configure the notification policies, you can edit default text that appears in the subject and message of the notification. In addition, you can insert variables fields, such as employee first names and last names, employee ID, and so forth, into these fields.

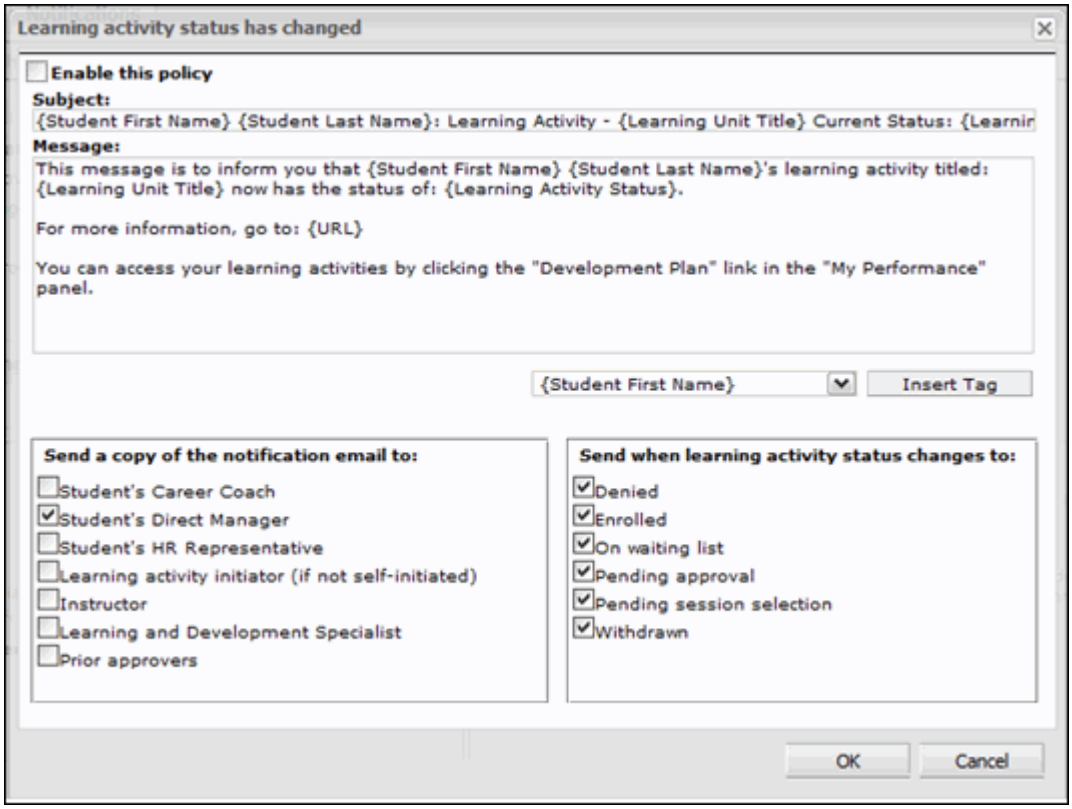
Finally, you can also configure who will receive copies of the notification emails. For example, you might want to configure the "Certification has expired" policy so that not only the student receives the notification, but his/her direct manager also receives a copy of the notification.

To Configure eLearning Manager Notification Policies

1. From the **Learning Control Center**, click the **Configuration** link.
   The **Catalogs** page displays.
2. Click the **Notifications** tab.
   The **Notifications** page displays.
3. In the **Notification Policies** area, click the policy you want to configure.
   The read only area in the lower part of the screen updates to show the current details of the policy.

4 Click the **Edit...** button.

The selected **Notification Policy** pop-up opens.



5 Select the **Enable this policy** check box.

6 Do any of the following:

- Edit the text in the **Subject** field. The **Subject** field has a 255 character limit.
- Edit the text in the **Message** field. The **Message** field has a 4000 character limit.

Tip: To insert variable tags, such as {First Name}, {Last Name}, and so forth into the notification, place your cursor where you want the tag to appear, select a tag from the drop-down list, and then click the **Insert Tag** button.

7 Do one of the following:

- If you clicked the **Learning activity status has changed** policy in step **3**, select any of the check boxes for the roles you want to send copies of the notification messages to in the **Send a copy to** area, and then select any check boxes for the status changes that will trigger an automatic notification message in the **Send when learning activity status changes to** area.
- If you clicked the **Learning activity requires approval** policy in step **3**, select any of the check boxes for the roles you want to send a composite of the notification messages to in the **Send to** area.
- If you clicked the **Learning unit details have changed** policy in step **3**, go on to step 8. Note that you must send this notification manually from the learning unit details page. For more

information, see *"Sending eLearning Manager Notifications Manually" on page 148*.

- If you clicked the **Session details have changed** policy in step **3**, select the **Include calendar export information as an attachment** check box if you want to include an .ICS file in the attachment. An .ICS file is a file with calendar information regarding the session details such as the start date and time, location, and so forth. Clear the check box if you do not want to attach the .ICS file to the notifications. Note that you must send this notification manually from the session details page. For more information, see *"Sending eLearning Manager Notifications Manually" on page 148*.
- If you clicked the **Certification expiry date is approaching** policy in step **3**, select any of the check boxes for the roles you want to send copies of the notification messages to in the **Send a copy to** area.
- If you clicked the **Certification has expired** policy in step **3**, select any of the check boxes for the roles you want to send copies of the notification messages to in the **Send a copy to** area.
- If you clicked the **Learning unit student information** policy in step **3**, go on to step 8. Note that you must send this notification manually from the learning unit students page. For more information, see *"Sending eLearning Manager Notifications Manually" on page 148*.
- If you clicked the **Session Student information** policy in step **3**, select the **Include calendar export information as an attachment** check box if you want to include an .ICS file in the attachment. An .ICS file is a file with calendar information regarding the session details such as the start date and time, location, and so forth. Clear the check box if you do not want to attach the .ICS file to the notifications. Note that you must send this notification manually from the learning unit sessions, student list page. For more information, see *"Sending eLearning Manager Notifications Manually" on page 148*.

8 Click the **OK** button.

Sending eLearning Manager Notifications Manually

The following *eLearning Manager* notifications must be sent manually:

- Learning unit details have changed
- Session details have changed
- Learning unit student information changes
- Session student information changes

You can send these types of notifications manually from the learning unit details or session details pages and from the students list, session student list, and session waiting list.

IMPORTANT: Before notifications can be sent, you must enable the appropriate notification policy. For more information, see *"Enabling eLearning Manager Notifications" on page 145*.

To Send a Notification Manually

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

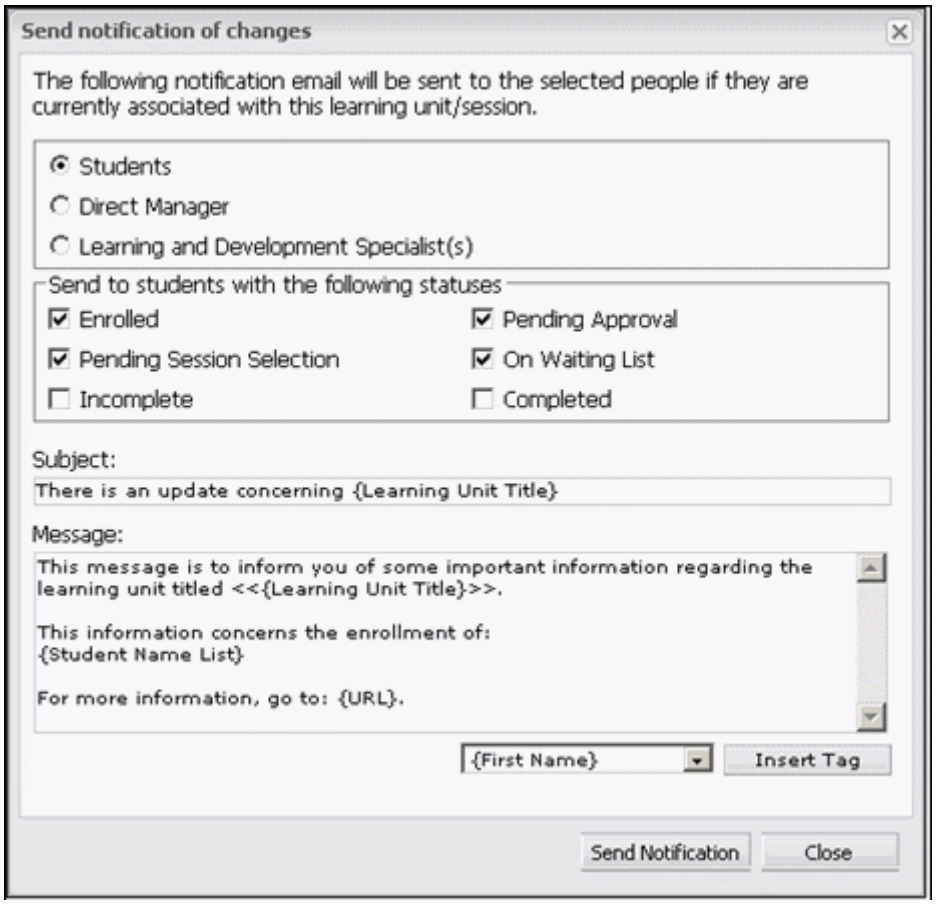
2 Click the **Title** link of the learning activity you want to access.

The **General Info** page displays.

3 Do any of the following:

- To send a notification for learning unit details, click the **Notify...** button.
- To send a notification for session details, click the **Sessions** tab, select a session and then click the **Notify...** button.
- To send a notification for learning unit student information, click the **Students** tab, click the **Notify...** button and select the **Send email notification** option.
- To send a notification for session student information, click the **Sessions** tab, select a session and then click the **Student List** or **Waiting List** tab, next click the **Notify...** button and select the **Send email notification** option.

The **Send notification . . .** pop-up opens.



NOTE: The pop-up displays different options and default text based on the type of notification selected. For example, session based notifications also includes Instructor(s) in the recipient list.

4 Click a radio button to select the type of recipient you want to send the notification to.

The **Students** radio button is selected by default.

NOTE: The **Send to...** label and status options change depending on which recipient is selected.

5 In the **Send to...** area, select or clear any of the available check boxes.

You must select at least one of the following options when enabled:

- Enrolled - selected by default
- Under Approval - available only if the Learning unit uses an approval policy, selected by default
- Requiring Session Selection - available only if the Learning unit is session based, selected by default
- On Waiting List - available only if the Learning unit is session based, selected by default
- Not Completed - will be unchecked by default
- Completed - will be unchecked by default

NOTE: Status check boxes are not used when the Learning and Development Specialist(s) or the Instructor(s) recipients are selected.

6 (Optional) Do any of the following:

- Edit the text in the **Subject** field. The **Subject** field has a 255 character limit.
- Edit the text in the **Message** field. The **Message** field has a 4000 character limit.

Tip: To insert variable tags, such as {First Name}, {Last Name}, and so forth into the notification, place your cursor where you want the tag to appear, select a tag from the drop-down list, and then click the **Insert Tag** button.

NOTE: If the {Student Name List} tag is used, students will see only their name. Managers will see their direct reports, Learning and Development Specialists see all students and Instructors will see all students in the session.

7 Click the **Send Notification** button.

A confirmation pop-up opens.

NOTE: Any changes made to the subject and/or message text will only be used for the current email, and does not affect the default text of the notification policy.

8 Click the **OK** button.

The **Notification** pop-up remains open.

9 You can make further edits and send another notification or click the **Close** button.

Sending Notifications to Next Approvers

Selecting this option will send an email to inform approvers that their approval is necessary for one or more students, in order for enrollment to take place. If the currently selected learning unit/session is not using an approval policy the option to send email notifications to the next approver will not be available.

To Send a Notification to the Next Approver

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the **Title** link of the learning activity you want to access.

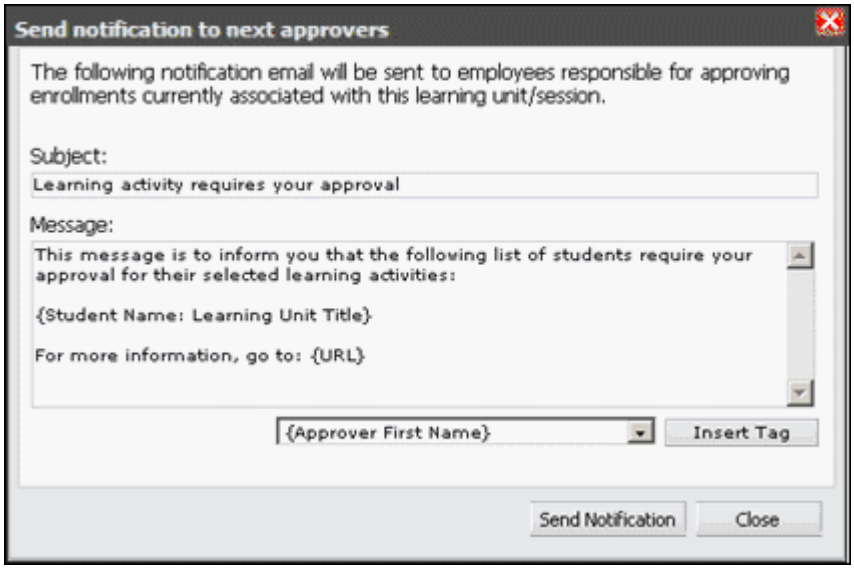
The **General Info** page displays.

3 Do any of the following:

- To send a notification for learning unit student information, click the **Student** tab.
- To send a notification for session student information, click the **Sessions** tab, select a session and then click the **Student List** or **Waiting List** tab.

4 Click the **Notify...** button, and select **Send email notification to next approver** from the list.

The **Send notification to next approvers** pop-up opens.



5 (Optional) Do any of the following:

- Edit the text in the **Subject** field. The **Subject** field has a 255 character limit.
- Edit the text in the **Message** field. The **Message** field has a 4000 character limit.

Tip: To insert variable tags, place your cursor where you want the tag to appear, select a tag from the drop-down list, and then click the **Insert Tag** button.

6 Click the **Send Notification** button.

The **Send notification to next approvers** pop-up closes.

NOTE: Any changes made to the subject and/or message text will only be used for the current email, and does not affect the notification policy's default text.

Chapter 11

eLearning Manager Calendar

This section introduces the *eLearning Manager* calendar. The calendar displays session-based learning in a familiar calendar view.

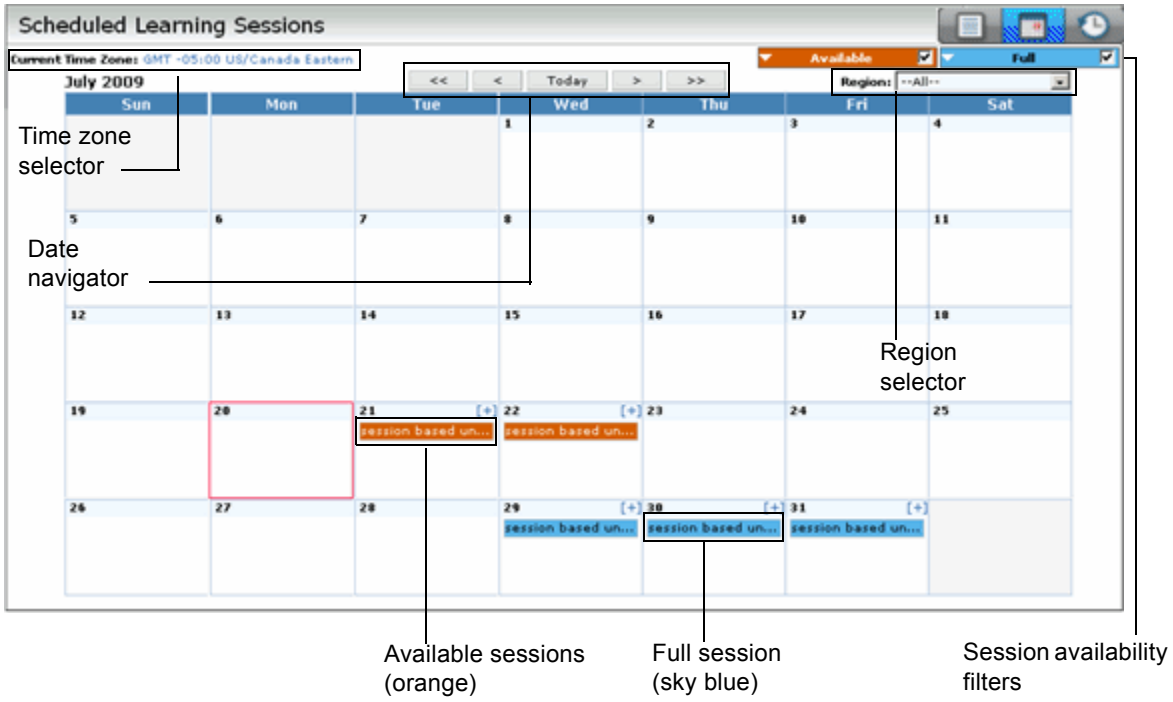
The section topics are as follows:

- *"About the eLearning Manager Calendar" on page 154*
- *"Browsing Sessions" on page 155*
- *"Filtering the Calendar" on page 157*
- *"Viewing Different Dates on the Calendar" on page 158*
- *"Customizing the Calendar Colors" on page 158*
- *"Exporting Session Information to Outlook" on page 159*
- *"Viewing Learning Unit Details from the Calendar" on page 160*
- *"Changing the Calendar's Time Zone" on page 161*

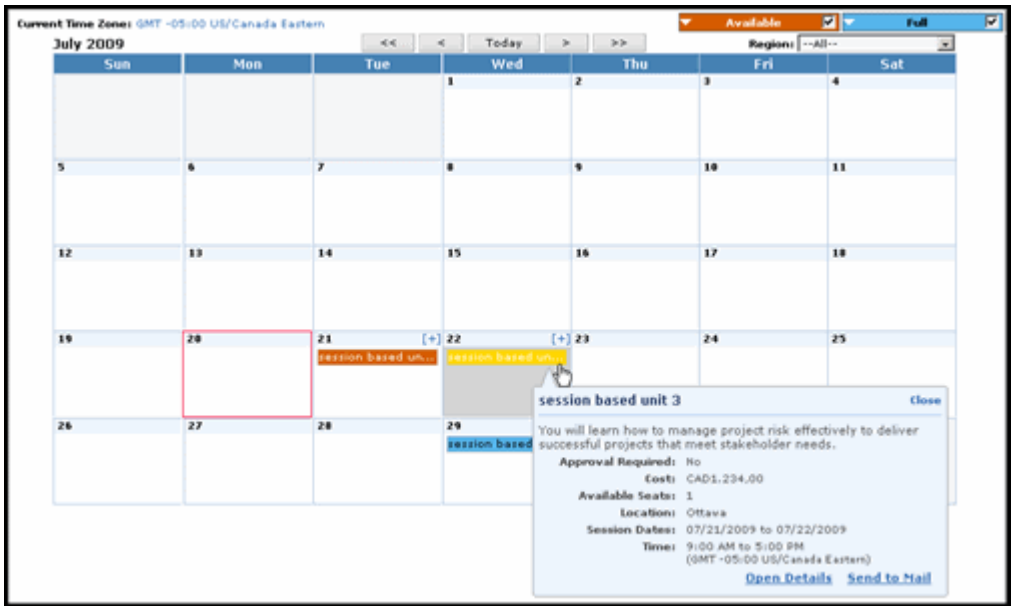
About the eLearning Manager Calendar

The *eLearning Manager* calendar displays information about scheduled learning units, or sessions. It also provides you with an graphical way to view sessions that are available and sessions that are full, all in a familiar calendar layout.

By default, the calendar shows the current month, but you can browse to different months or years using the navigation buttons. An example of the *eLearning Manager* calendar is shown below:



You can also pause your mouse pointer on a session to display a pop-up window, which provides more detail on the session. The pop-up window displays attributes that have been assigned to the learning units such as the cost of the session, the region, the location, and so forth (see below).



Note that the Calendar only shows all of the sessions with a status of "Final." Sessions that have a status of either "Draft" or "Archived" will not appear on the calendar.

If you are a manager, HR Rep, or coach, you can also view the calendars of your direct reports, direct representees, or coached employees, respectively.

For more information on what you can do with the calendar, see any of the following:

- *"Browsing Sessions" on page 155*
- *"Filtering the Calendar" on page 157*
- *"Viewing Different Dates on the Calendar" on page 158*
- *"Customizing the Calendar Colors" on page 158*
- *"Exporting Session Information to Outlook" on page 159*
- *"Viewing Learning Unit Details from the Calendar" on page 160*
- *"Changing the Calendar's Time Zone" on page 161*

Browsing Sessions

As the administrator, you can browse the calendar to view any of the following:

- available sessions
- full sessions

- details of the sessions

Only session-based learning units with a status of "final" appear on the calendar. Learning units that have a status of "draft" or "archived" will not appear.

Therefore, you can set the status of a session-based learning unit to "draft" if you want to test it. Once you're ready to allow employees to register for the session, you can change the status to "final." For more information on changing the status of a learning unit, see *"Changing the Status of a Learning Unit" on page 38*.

Available sessions

By default, available sessions appear as orange colored items on the calendar. You can customize this color at any time, however. For more information, see *"Customizing the Calendar Colors" on page 158*.

Available sessions are those that have an associated learning unit with a status of final, and the maximum number of seats has not yet been reached.

Full sessions

By default, full sessions appear as sky blue colored items on the calendar. You can customize the color of full sessions at any time, however. For more information, see *"Customizing the Calendar Colors" on page 158*.

Full sessions are those that do not have any available seats. Full sessions can still have students on its waiting list, however.

Details of Sessions

You can view the details of the sessions simply by pausing your mouse pointer on them. Session information can include any of the following information:

- title
- details
- cost
- region information
- start and end date
- approval information
- location

- session start and end time (the second time shown indicates the time in your local time zone)

NOTE: Sessions that span more than one day appear as individual entries on each day.

To Browse Sessions

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the calendar icon .

The calendar appears with the available and full sessions displayed.

3 If required, use the date navigator at the top of the calendar to move to a different month or year. For more information, see *"Viewing Different Dates on the Calendar" on page 158*.

Filtering the Calendar

You can filter the calendar to show only available sessions or full sessions. Table 11-1 below describes these session types and identifies the default color of each:

Table 11-1 Calendar session types

Session type	Description	Default color
Available	Sessions that do not have a maximum class size set or those that do have a maximum class size, but the current enrolled class size is less than the maximum.	Orange
Full	Sessions that have a maximum class size set and the current enrolled class size is greater than or equal to the maximum.	Sky blue

Although both available and full sessions are displayed on the calendar by default, you can clear the check box to hide the session type you don't want to view. For example, if you only want to show available sessions on the calendar, you can clear the check box next to "Full."

You can also filter the calendar by region. For example, if you're only interested in viewing sessions that have been associated with the Southern California region, you can select "Southern California" from the Region drop-down list.

To Filter the Calendar

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the calendar icon .

3 Do any of the following:

- Select the check box next to **Available** or **Full** to show that session type.
- Clear the check box to **Available** or **Full** to hide that session type.
- In the **Region** drop-down list, select a region.

Viewing Different Dates on the Calendar

When you open the calendar, the default view shows the current day of the current month, but you can quickly and easily view other dates on the calendar.

To View Different Dates on the Calendar

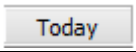
1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the calendar icon .

3 Click any of the buttons described below:

Button	Description
	Move back one year on the calendar
	Move back one month on the calendar
	Move forward on year on the calendar
	Move forward one month on the calendar
	Go to today's date on the calendar

Customizing the Calendar Colors

You can change the default colors used in the calendar to highlight available and full sessions. For example, if you want full sessions to be displayed in red, you can change the color using the color picker.

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the calendar icon .

3 Pause your mouse pointer over the down arrow next to the session type whose color you want to change. For example, if you want to change the color of the available sessions, pause your mouse pointer over the down arrow next to **Available**.

4 Click the color you want to use from the available colors.

Exporting Session Information to Outlook

You can export session information from the calendar to your personal calendar application, such as Outlook, Lotus, and other calendar tools that support the iCalendar format. You can export information from any session in the calendar. Consider doing this if you would rather view session information in your personal calendar rather than the calendar. Doing this will also allow you to use your personal calendar's reminders. Note that you can export session information to your personal calendar regardless of whether you have enrolled in the session or not.

Session information is sent via email to your email address, which is configured in the User Center. **Note:** If you use this feature, email will be sent regardless of the "Do not send emails" option, which is also set in the User Center.

The email body contains information such as the title and description of the session, session dates and times, region and location information, and so forth. Attachments containing iCalendar files are also sent, which, when double-clicked, will add entries to the employee's personal calendar.

NOTE:

- In order for the exported attachments to work, the employee's personal mail system must support the iCalendar format.
- The time zone must be set on the employee's computer in order for session times to be properly converted. For example, if the session is scheduled to start at 2 p.m. in New York but the employee is viewing the calendar from Los Angeles, the start time will be adjusted to 11 a.m.

1 From the **Learning Control Center**, click the **Learning** link.

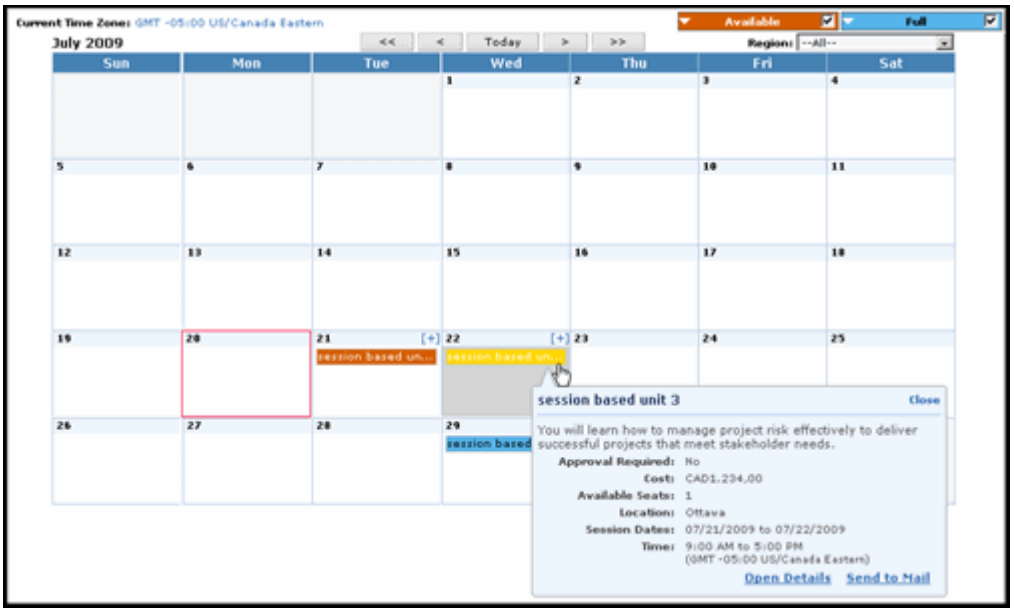
The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the calendar icon .

3 Click the session you want to export.

The details of the session appear in a pop-up window.



4 Click the **Send to Mail** link.

An email will be sent containing information on the training session as well as any attachments (if applicable).

5 Click the **OK** button in the confirmation window.

Viewing Learning Unit Details from the Calendar

From the calendar, you can view the details of the learning unit. Viewing the details will take you to the learning unit General Info page. For more information on what details are available, see *"Details of Sessions" on page 156*.

1 From the **Learning Control Center**, click the **Learning** link.

The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the calendar icon .

3 Click the session whose details you want to view.

4 Click the **Open Details** link.

The learning unit details appear. For more information on learning units, see *"About Learning Units" on page 28*.

Changing the Calendar's Time Zone

The default time zone for the calendar is based on the default set using the eAppraisal Options tab, but you can change the time zone for the calendar. When you change the time zone, the first session start time is updated to reflect the new time zone.

To Change the Calendar's Time Zone

1 From the **Learning Control Center**, click the **Learning** link.

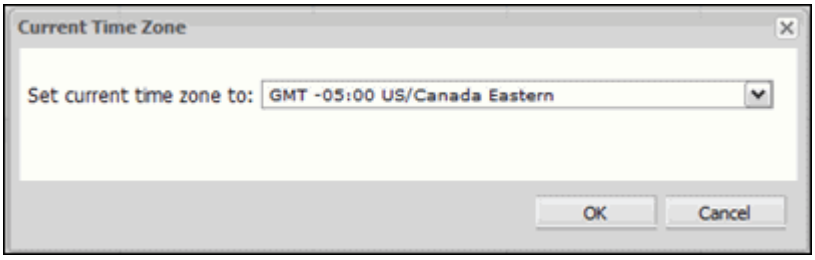
The **Learning** page displays.

NOTE: If you are already on the **Learning** page, you do not need to click the **Learning** link.

2 Click the calendar icon .

3 Click the **Current Time Zone** link.

The **Current Time Zone** window displays.



4 Using the drop-down list, select the new time zone, and then click the **OK** button.

The calendar updates to reflect the new time zone.

Chapter 12

eLearning Manager Reports

Chapter Scope

This section describes working with the four *eLearning Manager* reports: the certification report, the training impact report, the training report and the competency scores report.

The section topics are as follows:

- *"About eLearning Manager Reports" on page 164*
- *"Viewing a Certification Report" on page 173*
- *"Viewing a Competency Scores Report" on page 175*
- *"Viewing a Competency Scores Report" on page 175*
- *"Viewing a Competency Scores Report" on page 175*
- *"Customizing Report Columns" on page 177*
- *"Sorting Report Columns" on page 178*
- *"Printing Reports" on page 178*
- *"Exporting Reports" on page 179*
- *"Hiding Report Filters" on page 180*

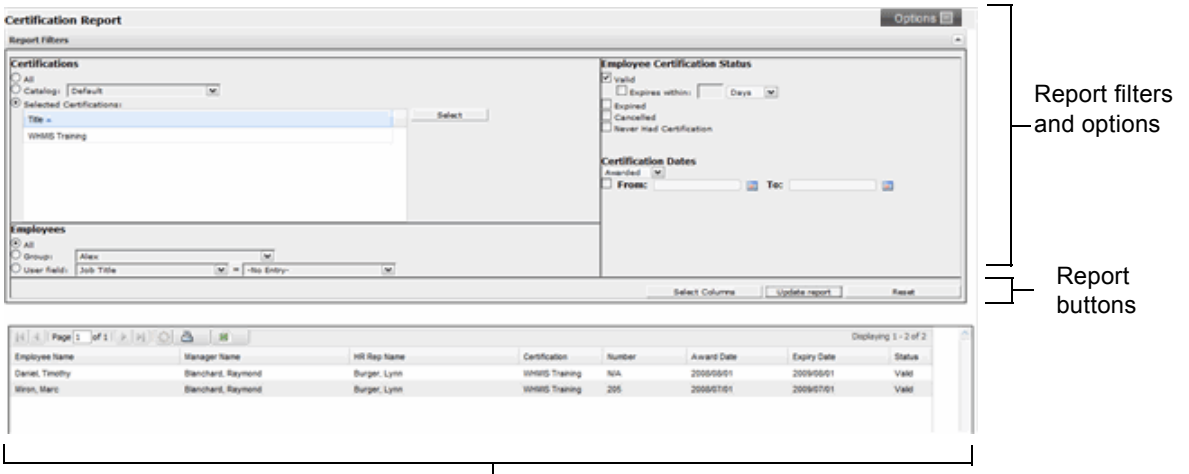
About eLearning Manager Reports

The following table describes the *eLearning Manager* reports available to users based on their role, and it provides an example of how you might use the reports.

Table 12-1 eLearning Manager Reports

Report Title	Users with access	Description	Example
Training Report	• Learning Admins • Super Users • Learning & Development Specialists	This report displays a student's course results for a specific learning unit. For more information, see *"About Training Reports" on page 165*.	You can use this report to provide insight into the performance of an employee, or employees, in a learning unit of your choice.
Training Impact Report	• Learning Admins • Super Users • Learning & Development Specialists	This report displays how successful (or unsuccessful) a training course was on improving an employee's competency scores. For more information, see *"About Training Impact Reports" on page 166*.	You can use this report to determine which courses provide the most value to your organization. Conversely, courses that do not directly improve your employee's performance could be scaled back or dropped entirely to save money for your company.
Certification Report	• Learning Admins • Super Users • Learning & Development Specialists	This report displays the certification status for employees. Specifically, you can use it to identify what certifications have expired, which certifications will expire in the near future, and so forth. For more information, see *"About Certification Reports" on page 168*.	You can use this report to monitor the status of your employee's certifications. For example, if your company requires that all employees are CPR certified, you can use this report to determine which employees have yet to complete their certification, and which employees need to recertify.
Competency Scores Report	• Super Users • Learning & Development Specialists	This report displays scores for various competencies you select. For more information, see *"About Competency Scores Reports" on page 168*.	You can use this report to display scores for various competencies, and compare the results to see changes over time.

The following example report is a certification report. Although each report has unique filtering options, they all share the same general layout described below:



The report filters and options appear in the top portion of the screen. Once the **Generate Report** button is clicked, the report data appears in the lower part of the screen.

In addition, you can customize the reports, print reports, and export reports to *Microsoft Excel*. For more information, see any of the following:

- *"Customizing Report Columns" on page 177*
- *"Sorting Report Columns" on page 178*
- *"Printing Reports" on page 178*
- *"Exporting Reports" on page 179*
- *"Hiding Report Filters" on page 180*

NOTE: Inactive employees will appear in reports.

About Training Reports

Training reports display course results for a learning unit or units. You can use this report to view all of your learning units, all learning units from a specific catalog, or results from selected learning units.

By default, only learning units with a status of "Final" will be available for this report. However, if you select specific learning units for the report, there is also an option to include archived learning units. You can view up to 50 learning units in the report. Finally, inactive employees will appear in this report.

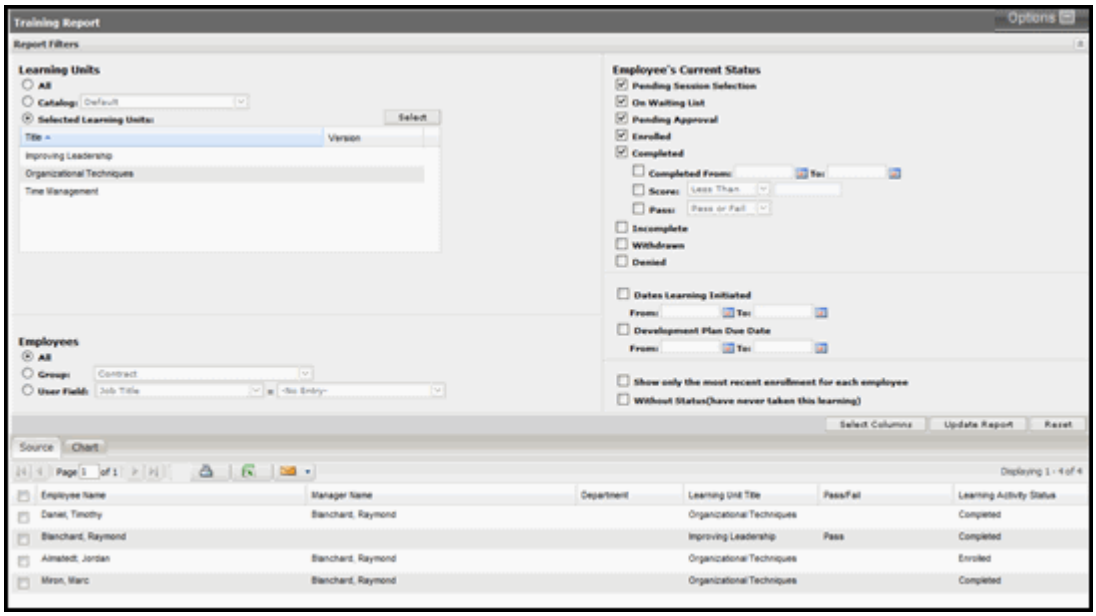
You also have several filtering options available with this report. For example, you can filter the students associated with the learning unit or units by their status, such as "enrolled," "completed," and/or "withdrawn." You can also filter based on results and/or dates.

In addition to viewing the raw report data, you can also view a bar chart that shows the count of students with the selected statuses for the selected learning unit(s).

If you choose to view the Training Report for a single Learning Unit, a summary of the learning unit will appear. The summary contains information such as the title and description of the learning unit, as well as summarized scoring information. The summary only appears when you select a single learning unit.

The Training report also allows you to send notifications. You can send notifications to one or several employees at once, or you can send notifications to the next approver.

An example of a training report appears below:



Learning Administrators, Super Users, and Learning & Development Specialists can access Training reports. For more information, see *"Viewing a Training Report" on page 169*.

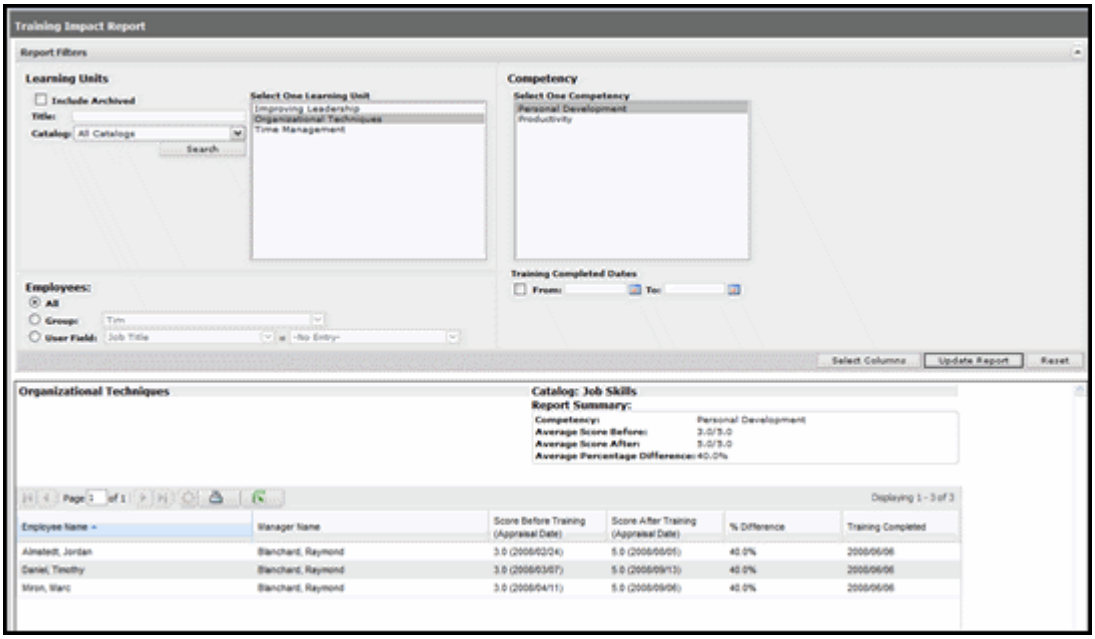
About Training Impact Reports

This report displays how successful (or unsuccessful) a training course was on improving an employee's competency scores. Note that the training must be associated with specific competencies and that the students must have been evaluated on the competency before and

after completing the training. Furthermore, only employees with score data from a scheduled, anniversary, or interim eAppraisal or from an eSuccession process will be included in the report results.

For example, suppose an employee is evaluated on a competency called “Personal Development.” In 2006, the employee scored an 8 out of 10 on this competency before attending any training. In 2007, the same employee completed training in a “Moving past conflict” course that was associated with the “Personal Development” competency. In 2008, the employee was evaluated on the same competency for a second time. The Training Impact report will give you an indication of how successful the training was in improving the employee’s score in the associated competency. If the employees’ scores tend to improve after training, it indicates that the training is probably worthwhile. On the other hand, if the employees’ scores stay level or even drop marginally, perhaps the training is not as effective as it could be.

An example of a Training Impact report appears below:



As the example report indicates above, the **% Difference** column shows that the training employees received helped to increase their performance by 40% for the “Personal Development” competency.

Note that the **Report Summary** area gives you a quick summary of the report results. These results present an average score before training, an average score after training, and a percentage difference result. If the scores in the results use different scales, the averages will be expressed as percentages.

If an employee has received a score on the same competency more than once, only the most recent score is used for the **Average Score Before** value. Similarly, only the oldest score that is still after the training is applicable for the **Average Score After** value.

For information on viewing this report, see *“Viewing a Training Impact Report” on page 171*.

About Certification Reports

This report displays the certification status for employees. Specifically, you can use it to identify what certifications have expired, which certifications will expire in the near future, and so forth.

In this report, as with all *eLearning Manager* reports, the report filters are located at the top of the screen, and the report data appears below the filters.

By default, only certifications with a status of "Final" will be available for this report. However, if you select specific certifications for the report, there is also an option to include archived certifications. You can view up to 50 certifications in the report. Finally, inactive employees will appear in the certification report.

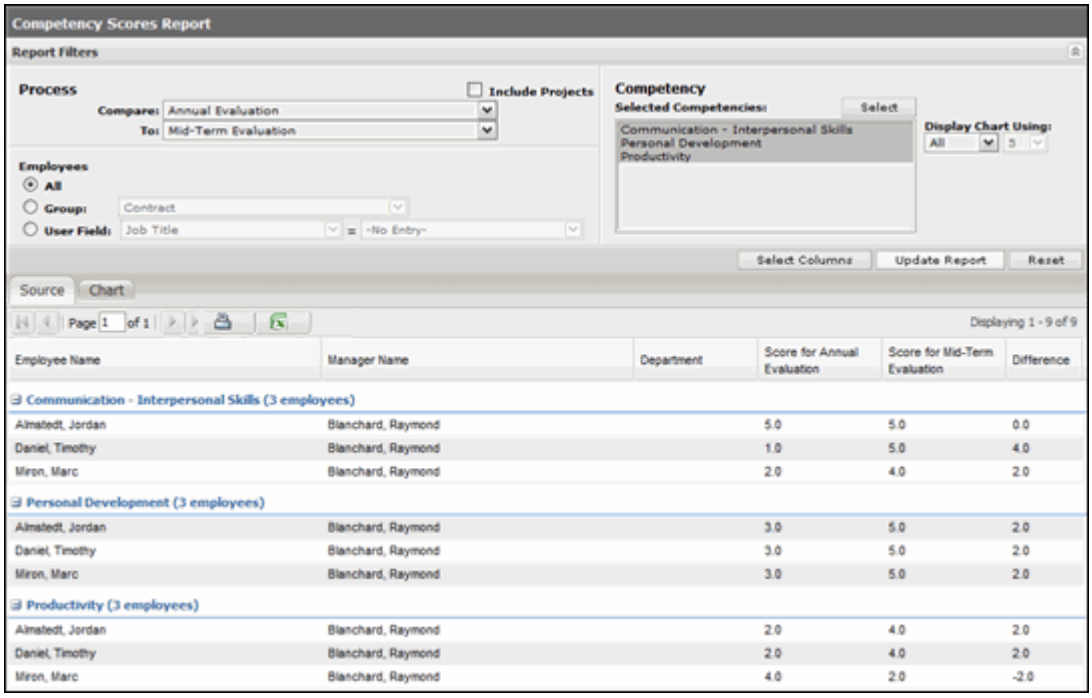
To view this report, see *"Viewing a Certification Report" on page 173*.

About Competency Scores Reports

The Competency Scores report displays scores for various competencies. You can use this report to display scores for various competencies, and compare the results to see changes over time.

You must select at least once competency for this report. In addition, if you compare two processes, only those competencies that appear in both processes will be available.

An example of the Competency Scores report appears below:



These reports are visible to Super Users and Learning & Development Specialists. For more information, see *"Viewing a Competency Scores Report" on page 175*.

Viewing a Training Report

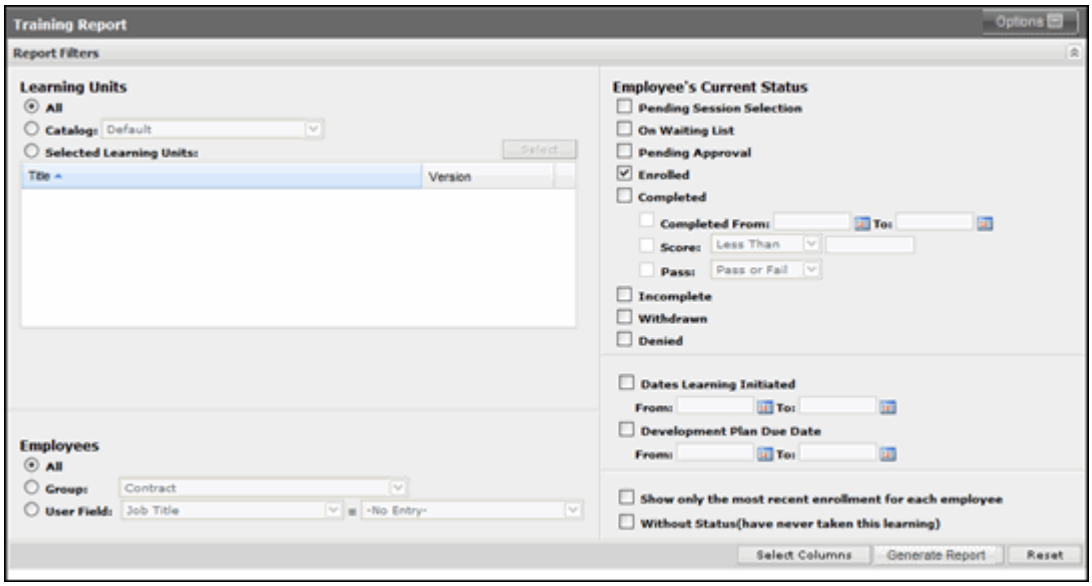
The Training report displays course status and results for a learning unit or units. You can use this report to view all of your learning units, all learning units from a specific catalog, or results from selected learning units. In addition, you can filter the report based on the employee's learning activity status for the report.

In addition to viewing the raw data in the report, you can view a chart of the data, which displays the status (enrolled, completed, and so forth) for the learning units you have selected.

By default, only learning units with a status of "Final" are available for the report. However, you have the option to include "Archived" learning units.

To View a Training Report

1 From the **Learning Control Center**, click the **Reports** link, and then click **Training Report**. The report appears in a new window.



2 In the **Learning Units** area, do one of the following:

- To view a training report for all learning units with a status of "Final," click the **All** radio button.
- To view a training report for all learning units from a specific catalog, click the **Catalog** radio button, and then select a catalog from the drop-down list. Note that the catalogs must not be archived to appear in the list of catalogs.
- To view a training report for one or more learning units of your choice, click the **Selected Learning Units** radio button, then click the **Select** button. The **Select Learning Units** window

appears. By default, only those learning units with a status of “Final” will appear in the **Available** area, but you can select the **Include Archived** check box if you want to include archived learning units in your search. Enter a few letters in the **Title** field, then, if required, select a catalog from the **Catalog** drop-down list, and then click the **Search** button. The learning units matching your choices appear in the **Available** area. Select the learning units you want to add and then click the **Add** button. Then click the **OK** button.

3 In the **Employee’s Current Status** area, select any of the check boxes/complete the fields as required.

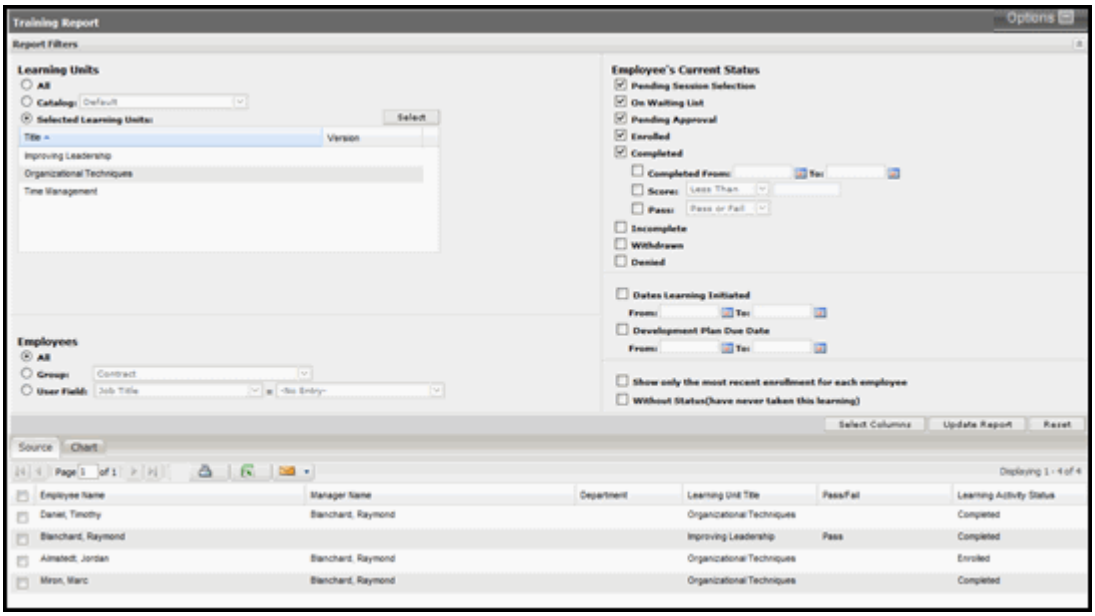
4 In the **Employees** area, do one of the following:

- To view a training report for all of the employees in the User Center, click the **All** radio button.
- To view a training report for a group of employees, click the **Group** radio button, and then select the group from the drop-down list.
- To view a training report for specific employees by a user field, such as Job Code, click the **User Field** radio button, then select **Job Code** from the drop-down list, and then select a value from the adjacent drop-down list.

5 (Optional) If you want to customize the columns in the report, click the **Select Columns** button. For more information, see *“Customizing Report Columns” on page 177*.

6 Click the **Generate Report** button.

Your report settings are saved, and the report data appears in the lower part of the window with the **Source** tab selected.



7 (Optional) If you want to send a notification to an employee (or several employees) or the next approver, select the check box next to the employee(s), then click the envelope icon , then select either **Send email notification to employee** or **Send email notification to next approver**, then configure the notification email as required, and then click the **OK** button.

8 (Optional) Click the **Chart** tab to view a count of the statuses in a bar chart format.

Only the statuses ("Under Approval," "Enrolled," and so forth) you selected in step 3 appear on the chart.

9 (Optional) Do any of the following:

- Customize the report columns. For more information, see *"Customizing Report Columns" on page 177*.
- Sort the report columns. For more information, see *"Sorting Report Columns" on page 178*.
- Print the report. For more information, see *"Printing Reports" on page 178*.
- Export the report to *Microsoft Excel*. For more information, see *"Exporting Reports" on page 179*.
- Hide the report filters so you can view the report data using the entire screen. For more information, see *"Hiding Report Filters" on page 180*.

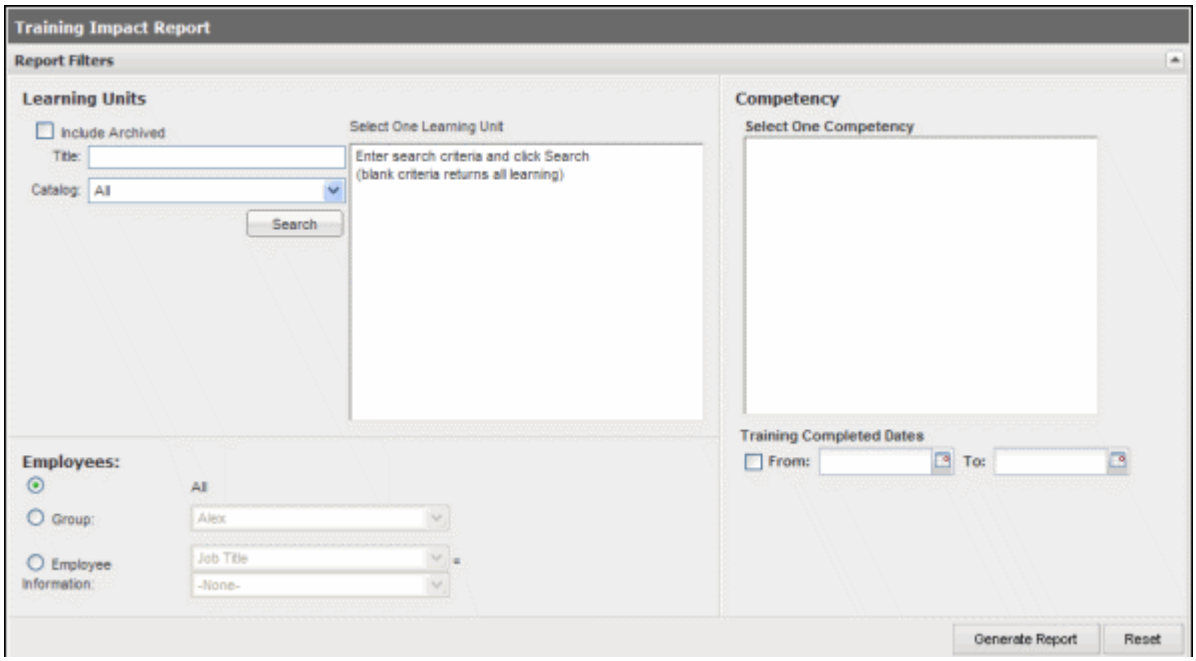
Viewing a Training Impact Report

This report displays how successful (or unsuccessful) a training course was on improving an employee's competency scores. Note that Learning Units must have competencies associated with them or they will not be available for this report.

To View a Training Impact Report

1 From the **Learning Control Center**, click the **Reports** link, and then click **Training Impact Report**.

The report appears in a new window.



2 (Optional) Select the **Include Archived** check box if you want to include archived catalogs in your search.

3 (Optional) In the **Title** field, enter the title of the Learning Unit.

4 (Optional) In the **Catalog** drop-down list, select the catalog that contains the Learning Unit you want to view.

5 Click the **Search** button.

Learning Units that have associated competencies appear.

6 In the **Select One Learning Unit** area, select a Learning Unit.

Competencies associated with the Learning Unit appear.

7 In the **Select One Competency** area, select a competency.

8 (Optional) Select the **From** check box and then use the calendar icons to enter **From** and **To** dates for the date the learning was completed.

9 In the **Employees** area, do one of the following:

- To view a training impact report for all employees, click the **All** radio button.
- To view a training impact report for all employees from a specific group, click the **Group** radio button, and then select a group from the drop-down list.
- To view a training impact report for employees based on a user field, click the **Employee Information** radio button, then select a field from the drop-down list, and then select a value in the adjacent drop-down list.

10 (Optional) Click the **Select Columns** button to choose the columns you want displayed in the report.

For more information, see *"Customizing Report Columns" on page 177*.

NOTE: The report always displays the **Score Before Training (Appraisal Date)**, **Score After Training (Appraisal Date)**, **% Difference**, and **Training Completed** columns.

11 Click the **Generate Report** button.

Your report settings are saved, and the report appears at the bottom of the screen.

12 (Optional) Do any of the following:

- Customize the report columns. For more information, see *"Customizing Report Columns" on page 177*.
- Sort the report columns. For more information, see *"Sorting Report Columns" on page 178*.
- Print the report. For more information, see *"Printing Reports" on page 178*.
- Export the report to *Microsoft Excel*. For more information, see *"Exporting Reports" on page 179*.
- Hide the report filters so you can view the report data using the entire screen. For more information, see *"Hiding Report Filters" on page 180*.

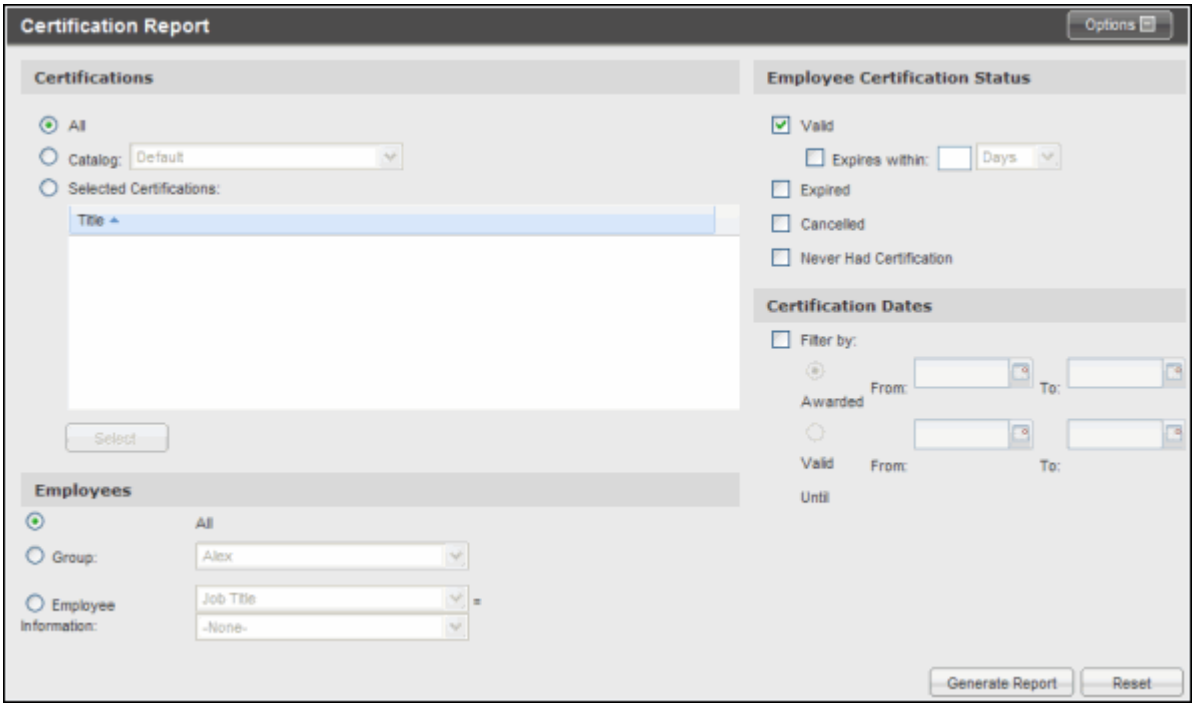
Viewing a Certification Report

This report displays the certification status for employees. Specifically, you can use it to identify which certifications have expired, which certifications will expire in the near future, and which employees are not certified.

To View a Certification Report

1 From the **Learning Control Center**, click the **Reports** link, and then click **Certification Report**.

The report appears in a new window.



2 In the **Certifications** area, do one of the following:

- To view a certification report for all of the employees in the User Center, click the **All** radio button.
- To view a certification report for all certifications in a catalog, click the **Catalog** radio button, and then select the catalog from the drop-down list.
- To view a certification report for a certification of your choice, click the **Selected Certifications** radio button, then click the **Select** button, then click the **Search** button, then select the certification from the **Available** area, then click the **Add** button, and then click the **OK** button. By default, only those certifications with a status of “Final” appear in the list, but you can select the **Include Archived** check box to also include archived certifications.

3 In the **Employee Certification Status** area, configure the check boxes and drop-down lists as required.

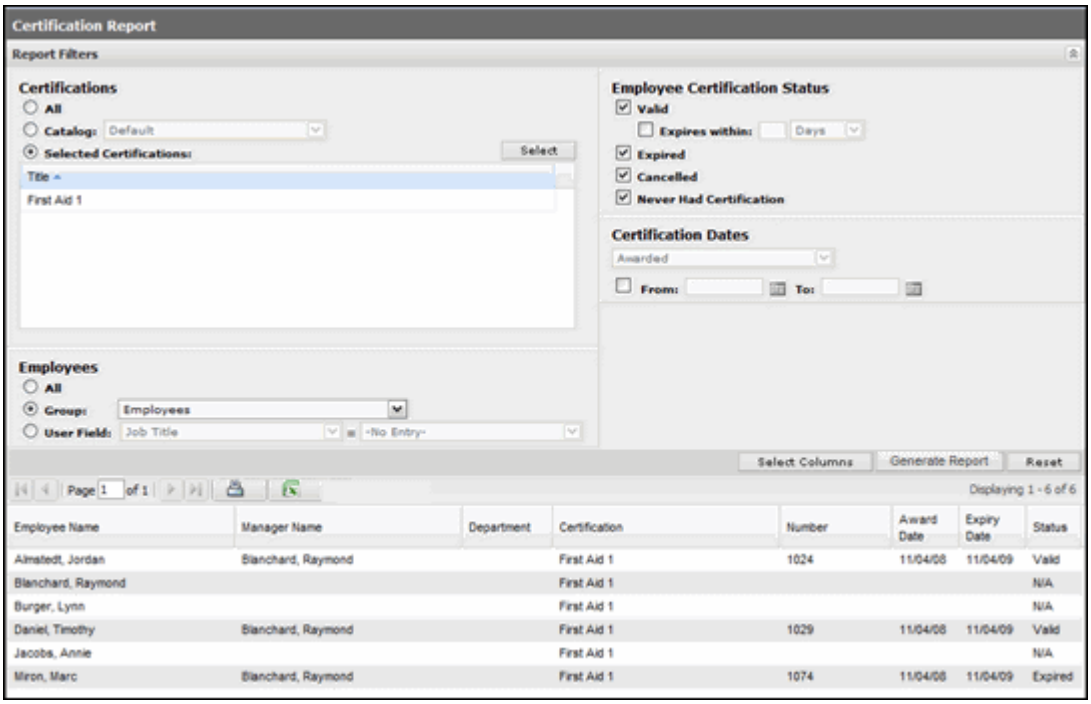
4 In the **Employees** area, do one of the following:

- To view a certification report for all employees, click the **All** radio button.
- To view a certification report for all employees from a specific group, click the **Group** radio button, and then select a group from the drop-down list.
- To view a certification report for employees based on a user field, click the **Employee Information** radio button, then select a field from the drop-down list, and then select a value in the adjacent drop-down list.

5 (Optional) If you want to customize the columns in the report, click the **Select Columns** button. For more information, see *"Customizing Report Columns" on page 177*.

6 Click the **Generate Report** button.

Your report settings are saved, and the report appears at the bottom of the screen.



7 (Optional) Do any of the following:

- Customize the report columns. For more information, see *"Customizing Report Columns" on page 177*.
- Sort the report columns. For more information, see *"Sorting Report Columns" on page 178*.
- Print the report. For more information, see *"Printing Reports" on page 178*.
- Export the report to *Microsoft Excel*. For more information, see *"Exporting Reports" on page 179*.
- Hide the report filters so you can view the report data using the entire screen. For more information, see *"Hiding Report Filters" on page 180*.

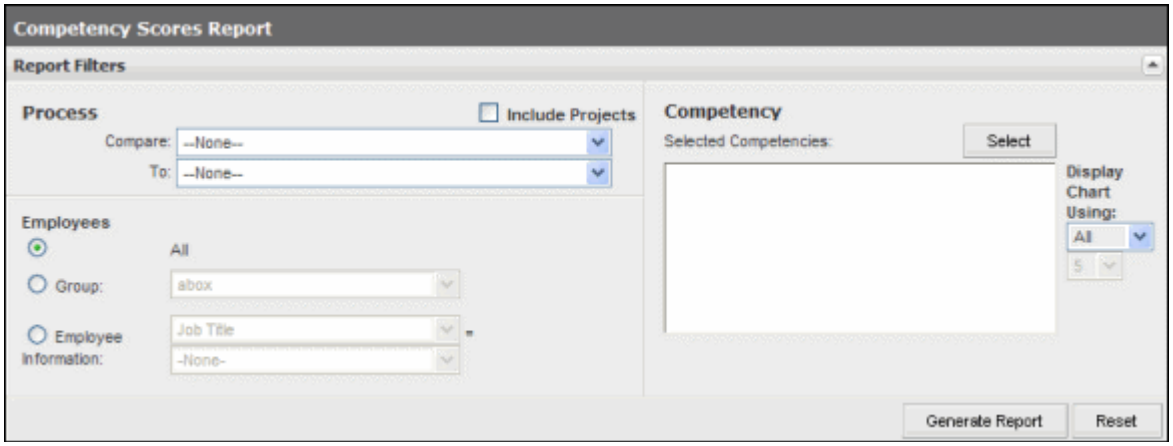
Viewing a Competency Scores Report

The Competency Scores report displays scores for various competencies. This report is designed to help Learning & Development Specialists determine who needs what kind of training.

To View a Competency Scores Report

1 From the **Learning Control Center**, click the **Reports** link, and then click **Competency Scores Report**.

The report appears in a new window.



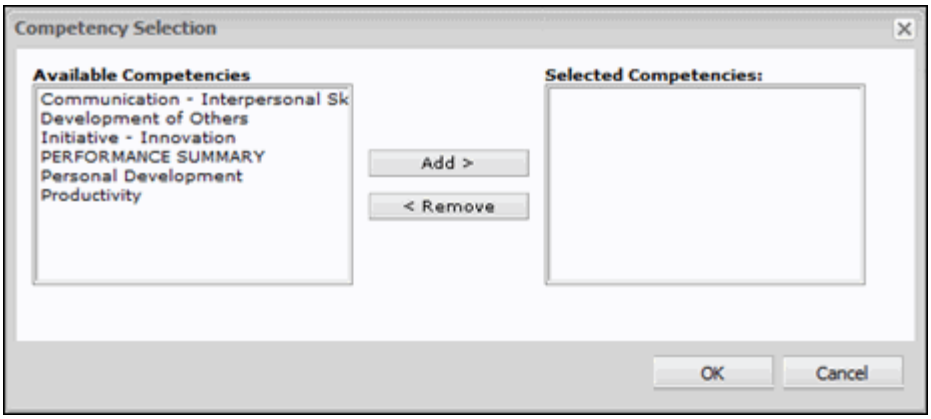
2 (Optional) Select the **Include Projects** check box if you want to include project processes in the report.

3 In the **Process** area, select an eAppraisal project or process, or an eSuccession talent assessment, from the **Compare** drop-down list.

4 (Optional) If you want to compare the results to another project or process, select one from the **To** drop-down list.

5 In the **Competency** area, click the **Select** button.

The **Competency Selection** window displays. Note that if you selected a second process in step 4, only competencies that appear in both projects or processes will appear in the **Available Competencies** field.



6 In the **Available Competencies** field, select the competency, or competencies, you want to view in the report, then click the **Add** button, and then click the **OK** button.

7 In the **Employees** area, do one of the following:

- To view a report for all employees, click the **All** radio button.
- To view a report for all employees from a specific group, click the **Group** radio button, and then select a group from the drop-down list.
- To view a report for employees based on a user field, click the **Employee Information** radio button, then select a field from the drop-down list, and then select a value in the adjacent drop-down list.

8 Click the **Generate Report** button.

Your report settings are saved, and the report appears at the bottom of the screen.

If you chose to view a single process, a single **Score for {process name}** column appears in the report. If you chose to compare a project/process to another project/process, an additional two columns (**Score for {process name}** and **Difference**) appear in the report.

9 (Optional) Click the **Chart** tab to view the report in a bar chart format. Then, if required, change how much information is shown in the chart using the drop-down lists in the **Display Chart Using** area.

10 (Optional) Do any of the following:

- Customize the report columns. For more information, see *"Customizing Report Columns" on page 177*.
- Sort the report columns. For more information, see *"Sorting Report Columns" on page 178*.
- Print the report. For more information, see *"Printing Reports" on page 178*.
- Export the report to *Microsoft Excel*. For more information, see *"Exporting Reports" on page 179*.
- Hide the report filters so you can view the report data using the entire screen. For more information, see *"Hiding Report Filters" on page 180*.

Customizing Report Columns

By default, certain columns, such as **Employee Name**, **Manager Name**, and **Department**, are displayed when you view a report. You can customize which columns are displayed in a report at any time, however.

For example, suppose you want to view an anonymous report that only contains the employee ID and not the employee's name, manager's name, and so forth. You can customize the columns of the report by removing all the unwanted columns so that only the employee ID is displayed.

Note, however, that only the Training report's columns are completely customizable. The Training report allows you to customize the columns to show additional columns from the learning unit such as the Learning Activity Status, Cost, and so forth. For the remaining reports, you can only customize employee filter columns, such as the Employee ID, Job Code, and so forth.

When you customize the columns and update the report, your changes will be saved. That is, the next time you view the report, the last changes you made will be retained. Click the **Reset** button if you want to reset the report to its default settings.

To Customize Report Columns

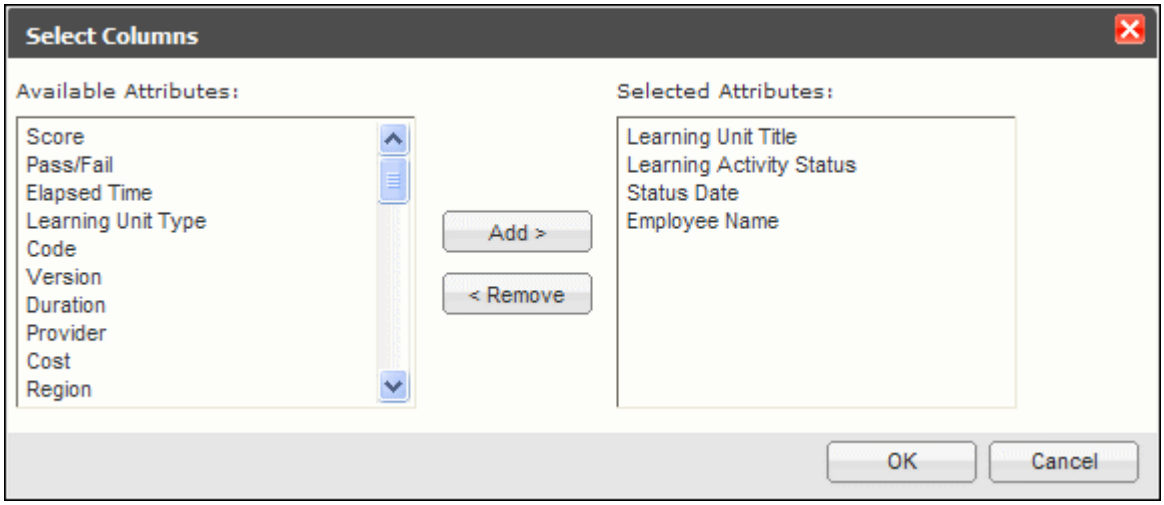
1 View a report. For more information, see any of the following:

- *"Viewing a Training Report" on page 169*
- *"Viewing a Training Impact Report" on page 171*
- *"Viewing a Certification Report" on page 173*
- *"Viewing a Competency Scores Report" on page 175*

The report appears in a new window.

2 Click the **Select Columns** button.

The **Select Columns** window displays showing the available columns and the selected columns.



3 In the **Available Attributes** area, select the columns you want to add to the report, and then click the **Add >** button.

Tip: Use the CTRL or SHIFT keys to select multiple individual or multiple adjacent items from the list.

4 (Optional) In the **Selected Attributes** area, select the columns you want to remove from the report, and then click the **< Remove** button.

5 Click the **OK** button.

6 Click the **Generate Report** button to view your changes.

Sorting Report Columns

With *eLearning Manager* reports, you can sort any column in ascending or descending order. For example, suppose you have a certification report showing certification data for several hundred employees. You can sort on the status column to display the employees with a status of "expired" at the top of the report.

To Sort Report Columns

1 View a report. For more information, see any of the following:

- *"Viewing a Training Report" on page 169*
- *"Viewing a Training Impact Report" on page 171*
- *"Viewing a Certification Report" on page 173*
- *"Viewing a Competency Scores Report" on page 175*

The report appears in a new window.

2 Click the column header you want to sort.

An ascending sort arrow appears to indicate the order of the sorting.

3 (Optional) Click the column header again to sort in the opposite direction.

A descending sort arrow indicates the new order of the sorting.

Printing Reports

You can print all reports using your web browser's print feature. You can print up to 5000 records.

To Print a Report

1 View a report. For more information, see any of the following:
- *"Viewing a Training Report" on page 169*
- *"Viewing a Training Impact Report" on page 171*
- *"Viewing a Certification Report" on page 173*
- *"Viewing a Competency Scores Report" on page 175*

The report appears in a new window.

2 Click the printer icon .

The report appears in a new window ready for you to print.

3 Print the report using your web browser's print feature.

Exporting Reports

When you export your reports, the first worksheet displayed in your workbook contains information such as the report title, the date it was generated, and so forth; subsequent worksheets contain the report data. Text formatting such as bold and underlines are exported but images are not. You can export up to 5000 records.

To Export a Report

1 View a report. For more information, see any of the following:
- *"Viewing a Training Report" on page 169*
- *"Viewing a Training Impact Report" on page 171*
- *"Viewing a Certification Report" on page 173*
- *"Viewing a Competency Scores Report" on page 175*

The report appears in a new window.

2 Click the export icon .

3 Do either of the following:
- If you are using Internet Explorer, click the **Open** button.
- If you are using Firefox, click the **Open With** radio button, and then click the **OK** button.

The report appears in your spreadsheet program. Note that the first worksheet of the spreadsheet details the title of the report, any filters applied, and so forth. The report data appears on the second worksheet.

Hiding Report Filters

You can hide the filters area of the report window, which allows you to view all of the report data using the full screen. Consider hiding the report filters if you have a lot of data on the screen.

To Hide Report Filters

1 View a report. For more information, see any of the following:

- *"Viewing a Training Report" on page 169*
- *"Viewing a Training Impact Report" on page 171*
- *"Viewing a Certification Report" on page 173*
- *"Viewing a Competency Scores Report" on page 175*

The report appears in a new window.

2 Configure the report filters as required.

3 Depending on which report your open, click either the **Options** button or the arrow to hide or expand the report filters.

Index

Symbols

% score 102

A

About
- Catalog Statuses 23
- Learning Activity Workflow 7
- Learning Page 15
- Learning Units 28

Access Rights
- Administrator 3
- Permissions 3
- Privileges 3
- Super User 3

Active Catalogs
- viewing 23

Active catalogs
- about 23

Add Certificate 103, 104
Add note field 121
Adding
- Approval Policies 127
- Catalogs 21
- Content to a Learning Unit 40
- Learning Paths 71
- Learning Types 139
- Learning Units 29
- Learning Units to Learning Paths 76
- Prerequisites to a Learning Unit 45
- Professional Credits 135
- Regions 133
- Resources to a Learning Unit 41
- Result settings 43
- sessions 85
- Students to Learning Paths 78

AICC
- adding 36
- importing 36
- troubleshooting 37
- uploading 36

Annotations
- adding for students 110
- adding to learning 121
- viewing 122

Approval Policies
- about 126
- adding 127
- deleting 132
- editing 130

Approvals
- about 114
- bypassing 119
- sending notifications 145
- skipping 119

Approve button 117, 118
Approvers
- sending Training Report notifications 169

Approving
- about 114
- multiple learning requests 117

single learning requests 118
Archived Catalogs
about 23
viewing 23
Archiving
Certifications 56
eLearning Manager Catalogs 24
Learning Paths 75
Learning Units 38
Assigning
catalogs to a manager 25
Attendance
proving 103, 104
Auditing
adding a certification of completion to Learning Activities 103, 104
Audits
proving learning 102
Automatically awarding Certifications 56
Available courses
viewing on calendar 158
Available sessions
about 156
Award automatically if learning is passed 51
Awarding
Certifications automatically 56
Certifications manually 59

B

Blue sessions 156
Buttons
Approve 117, 118
Deny 117, 118
Insert Tag 146
Show Development Plan 118

C

Calendar
about 154
available sessions 156
blue sessions 156
browsing 158
browsing for courses 155
changing default colors 158
customizing colors 158
exporting items 159
filtering available or full sessions 157
filtering by region 157
full sessions 156
navigating 158
orange items 156
showing/hiding available sessions 157
showing/hiding full sessions 157
Canceling
sessions 88
Career Coach role 4
Catalog Manager role 5
Catalog managers
removing 25
Catalogs 19
about 20
active status 23
adding 21
adding AICC content 36
adding Certifications 51
adding SCORM content 36
archived status 23
archiving 24
assigning to a manager 25
changing the default 25
creating 21
deleting 22
editing 22
filtering by status 23
hiding from users 24
overview 20
saving for later use 24
sorting 24
sorting active 24
sorting alphabetically 24
sorting archived 24
sorting by default status 24
sorting by learning items 24
sorting by number of managers 24
understanding status 23
uploading AICC content 36
uploading SCORM content 36
Certification notifications
about 64
configuring 64

Certification of completion 103, 104
Certification Reports
about 168
customizing 177
exporting 179
hiding filters 180
printing 178
sorting columns 178
viewing 173
Certifications 49
about 50
about notifications 64
adding 51
adding expiry date 51
adding keywords 51
adding Learning Paths 61
adding Learning Units 61
adding to Catalogs 51
archiving 56
awarding automatically 51, 56
awarding manually 59
creating 51
defining editing roles 51
deleting 55
deleting from an employee 64
editing details 54
expired 62
finding 53
notifying of expiry 64
overview 50
pending expiry notifications 64
printing 67
renewing 62
searching 10, 53
searching specific Catalogs 53
sending notifications of upcoming expiry 145
sending notifications when expired 145
setting status 51
viewing details 54
Class sizes
entering for sessions 85
Columns
adding to reports 177
customizing in reports 177
removing from reports 177
Company Coach role 4
Competency being developed 93
Competency Scores Reports
about 168
customizing 177
exporting 179
hiding filters 180
printing 178
sorting columns 178
viewing 175
Completed results 102
Configuring
Certification email notifications 64
Learning Options 124
notification policies 146
Content
adding AICC 36
adding SCORM 36
Cost of sessions 156
Courses
browsing using the Calendar 155
exporting to spreadsheet 159
See Sessions
viewing availability via the Calendar 155
viewing descriptions with the calendar 155
viewing details via the Calendar 155
Creating
Catalogs 21
eLearning Manager Certifications 51
Learning Paths 71
Learning Units 29
sessions 85

D

Default Catalog
changing 25
Deleting
Approval Policies 132
Catalogs 22
Certifications 55
Learning Paths 75
Learning Types 141
Learning Units 39
Professional Credits 138

Regions 134
sessions 88
Deny button 117, 118
Denying
multiple learning requests 117
requests for learning 114
single learning requests 118
Details
viewing Certifications 54
viewing for sessions 90
Development Plans
adding for students 93
Documentation
Halogen's viii
Double arrow 158

E

Editing
Approval Policies 130
Catalogs 22
Certification details 54
Learning Paths 73
Learning Types 140
Learning Units 38
Professional Credits 137
Regions 134
sessions 87
eLearning Manager
about Catalogs 20
about notifications 144
about Reports 164
about sessions 84
about the Calendar 154
about the Certification Report 168
about the Competency Scores Report 168
about the Learning Page 15
about the Training Impact Report 166
about the Training Report 165
adding AICC content 36
adding SCORM content 36
archiving Catalogs 24
archiving Certifications 56
assigning Catalogs to a Manager 25
benefits and features 2
browsing the Calendar 155, 158
changing the Calendar time zone 161
changing the default Catalog 25
configuring notification policies 146
creating Certifications 51
customizing Calendar colors 158
deleting Certifications 55
editing certification details 54
editing notification policies 146
enabling notifications 145
exporting the Calendar 159
filtering Catalogs by status 23
filtering the Calendar 157
floating tooltip 18
hiding Catalogs from users 24
hiding filters in reports 180
importing AICC content into Catalogs 36
inserting variables in notifications 148
Learning list 18
list of available reports 164
navigating the Calendar 158
Navigation toolbar 17
overview 1, 2
overview of Certifications 50
overview of Reports 164
roles 3
Search toolbar 17
eMail messages
about 144
Employees
approving individual learning requests 118
approving multiple learning requests 117
deleting awarded Certifications 64
deleting from Learning Units 96
denying individual learning requests 118
denying multiple learning requests 117
sending Training Reports notifications 169
Enable this policy 145
Enrolled 102
Enrolling
Students to Learning Paths 78
Enrollment
Students to Learning Paths 78
Enrollment & Session Manager
role 6

Entering
multilingual text 13
Expired Certifications
sending notifications 145
Exporting
items to eLearning Manager Calendar 159
reports 179

F

Fail 102
Fields
inserting into notifications 148
Filtering
eLearning Manager catalogs by status 23
Floating tooltip 18
Full courses
viewing on calendar 158
Full sessions
about 156

G

Groups
adding to Learning Units 95

H

Halogen eLearning Manager
overview 2
Halogen's
documentation viii
Hard copies of Certifications 67

I

Import options 105
Importing
Learning Units 33
results 105
SCORM content into Catalogs 36
Incomplete 102
Insert Tag button 146
Inserting tags 148
Instructor role 7
ISO audit 103, 104
Issued by 51

K

Keywords
adding to Certifications 51

L

Language
display text 13
Learning
adding notes 121
bypassing approvals 119
proving attendance for non-session-based learning 104
proving attendance for session-based learning 102
skipping approvals 119
viewing notes 122
Learning & Development Specialist role 6
Learning Activities
awarding a certification of completion 103, 104
Learning activities
adding for students 93
sending status updates 146
Learning activity status changes
sending notifications 145
Learning Activity Workflow
about 7
Learning Administrator role 5
Learning approvals
approving multiple 117
approving single 118
denying for individual employees 118
denying multiple 117
Learning Control Center
Header area 16
quick tour 14
Learning Elements
searching 10
Learning List 18
Learning Options
about Learning Types 138
about Professional Credits 135
about Regions 132
adding Approval Policies 127
adding Learning Types 139

adding Professional Credits 135
adding Regions 133
configuring 124
deleting Approval Policies 132
deleting Learning Types 141
deleting Professional Credits 138
deleting Regions 134
editing Approval Policies 130
editing Learning Types 140
editing Professional Credits 137
editing Regions 134
eLearning Manager Learning Options 123
viewing and sorting 125
Learning Page
about 15
Learning Paths 69
about 70
Activities 78
adding 71
adding Learning Units 76
adding students to 78
adding to Certifications 61
Archived status 75
creating 71
deleting 75
Draft status 75
editing 73
enrollment 78
Final status 75
searching 10
status 75
viewing Activities 78
viewing Certifications 82
Learning requests
about 114
approving or denying for individuals 118
approving or denying multiple 117
Learning status
changing 104
Learning Types
about 138
adding 139
deleting 141
editing 140
Learning Units 27
about 28
adding 29
adding content 40
adding groups of students 95
adding Prerequisites 45
adding Resources 41
adding students 93
adding to a Learning Path 76
adding to Certifications 61
adding to eLearning Manager 33
Archived status 38
configuring notifications 148
creating 29
deleting 39
deleting employees from 96
deleting students from 96
Draft status 38
editing 38
Final status 38
importing 33
importing AICC 36
importing SCORM 36
printing student lists 107
Results 43
searching 10
sending notifications for changes 145, 148
sending notifications for detail changes 148
status 38
uploading content 40
uploading resources 41
viewing Certifications 47
viewing details from the Calendar 160
viewing Learning Paths 47
Licensing 50
Location of sessions 156

M

Managers
assigning eLearning Manager Catalogs 25
Mandatory learning 93
Manually awarding Certifications 59
Marks
entering for students 102
importing 105
Microsoft Excel

exporting Calendar items 159
exporting reports to 179
Multilingual
display text 13
Multilingual text
entering 13

N

Navigation toolbar 17
Next Approver
notifications 150
Notes
adding for students 110
adding to learning requests 121
viewing for learning requests 122
Notifications
about 144
about Certification 64
configuring for Learning Units 148
configuring for sessions 148
customizing messages 146
editing policies 146
enabling 145
inserting tags 146
inserting variables 146, 148
Learning unit student info 148
next approver 150
selecting recipients 148
sending copies to other roles 146
sending for approaching expiring Certifications 145
sending for changes to Learning Activity status 145
sending for changes to session details 145
sending for expired Certifications 145
sending for status changes 146
sending from a Training Report 169
sending manually 148
sending to approvers 145
Session student information 148
turning on 145
using 145

O

Orange sessions 156
Outlook
exporting Calendar items 159
exporting session information 159

P

Paper clip icon 103, 104
Pass 102
Percentage 102
Policies
enabling for notifications 145
Printing
Certifications 67
Learning Unit student list 107
session student list 107
Professional Credits
about 135
adding 135
deleting 138
editing 137
Proof of completion for non-session-based learning 104
Proof of completion for session-based learning 102
Proof of learning 103, 104
Proof of learning for non-session-based learning 104
Proof of learning for session-based learning 102

Q

Quick tour of Learning Control Center 14

R

Recipients of notifications
selecting 148
Red medal icon 50
Region
filtering on the calendar 157
Regions
about 132
adding 133

deleting 134
editing 134
Registered courses
viewing on calendar 158
Remove
Catalog Managers 25
Remove certificate 103, 104
Renewing Certifications 62
Reports
about 164
adding columns 177
customizing columns 177
exporting 179
hiding filters 180
identifying effective training 171
list of available for eLearning Manager 164
overview 164
removing columns 177
resetting to defaults 177
showing filters 180
viewing a Certification Report 173
viewing a Competency Scores Report 175
viewing a Training Impact Report 171
viewing a Training Report 169
Reset button 177
Results
entering for students 104
importing for students 105
Roles
access and permissions 3
Career Coach 4
Catalog Manager 5
Company Coach 4
eLearning Manager roles 3
Enrollment & Session Manager 6
Instructor 7
Learning & Development Specialist 6
Learning Administrator 5
Super User 4
user roles 3
Roles who can edit 51

S

Saving
eLearning Manager Catalogs for later use 24
Scheduling sessions 85
SCORM
adding 36
importing 36
uploading 36
Search list
printing 10
sorting 10
Search toolbar 17
View toolbar 17
Searching
Certifications 10
Learning Elements 10
Learning Paths 10
Learning Units 10
Send Notification 148
Send to mail 159
Sending
notifications manually 148
Sessions
about 84
about details 156
about the Waiting list 109
adding 85
adding instructors 85
adding notes 85
adding notes for students 110
adding students 97
assigning a percentage score 102
blue colored 156
browsing 155
canceling 88
configuring notifications 148
cost 156
creating 85
defined
deleting 88
deleting students 101
editing 87
enrolling students 97
entering location 85
entering results for students 102
exporting to Outlook 159
failing grade 102

filtering the list 89
full 156
hiding available in the Calendar view 157
hiding full in Calendar view 157
locations 156
marking as completed 102
maximum and minimum class sizes 85
orange colored 156
passing grades 102
printing student lists 107
proving attendance 102
region information 156
scheduling 85
selecting for students 97
sending notifications for changes 145, 148
sending notifications for changes to details 148
showing available in the Calendar 157
showing full in the Calendar view 157
sorting the list 89
specifying region 85
specifying time zone 85
start and end times 156
viewing available 155
viewing details 90
viewing full 155
withdrawing students 102
Set current time zone 161
Show Development Plan button 118
Single arrow 158
Skip Next Approval button 119
Sorting
Catalogs 24
Learning Options 125
session lists 89
Spreadsheet
exporting reports to 179
Status
changing for learning 104
changing for Learning Paths 75
changing for Learning Units 38
Student information
notifications 148
Students
about the Waiting list 109
adding annotations 110
adding Development Plans 93
adding learning activities 93
adding notes 110
adding to Learning Units 93
adding to sessions 97
choosing sessions 97
completing sessions 102
deleting from a Learning Unit 96
deleting from the session student list 101
enrolling in sessions 97
entering results for 102
importing results 105
marking as withdrawn 102
printing lists 107
removing from the session student list 101
selecting sessions 97
Super User role 4

T

Text files
importing Learning Units 33
importing results 105
Time zone
changing for Calendar 161
setting for sessions 85
Today button 158
Tooltip 18
Training
measuring effectiveness 171
Training Impact Reports
about 166
customizing 177
exporting 179
hiding filters 180
printing 178
sorting columns 178
viewing 171
Training Reports
about 165
about notifications 165
about the summary 165
customizing 177
exporting 179
hiding filters 180
printing 178

sending notifications 169
sorting columns 178
viewing 169

U

using
Halogen's documentation viii

V

View toolbar 17
Viewing 78
active Catalogs 23
archived Catalogs 23
Learning Options 125
Learning Unit details from the Calendar 160
Training Impact Reports 171

W

Waiting list
about 109
Withdrawn results 102