Adding Individuals to Flexi Groups

1. Access Learn@ISU
2. Click on Manager Main Menu and choose Administration (this may look different based on your permission level in Learn@ISU, however Flexi Groups are always in the Administration tab.

3. On the Administration Menu, you will have three links, choose Learners:
   - Flexi-Group Manager – Courses (groups set up using specific courses)
   - Flexi-Group Manager – Learners (groups set up using individual ID numbers)
   - Flexi-Group Manager – Catalogs (groups set up using specific catalogs of courses).

Learn@ISU will complete the initial set up of your group, this includes:

Entering the type of group, name of the group (supplied by you) and assigning the group to the correct individuals.

4. Choose the link that your group is a part of to continue (Learn@ISU will share this with you when you are granted access).
5. In the Search box, type the name of your group, then click Go.

6. Find your group and click on the icon  to access your group. Please note, do not select a group that has an individual’s 9-digit UID number after their name. Those groups are updated by the system on a daily basis.
7. Next, review the name at the top to ensure you have selected the correct group. If you do not, click on the back button in your browser and search again. If you do, click Next to continue. Do not make any changes here.

8. Click on the Filters tab across the top to access your learners.

9. To add a new individual – scroll to the bottom of the page and choose Learner ID (9-digit University ID number) in the Data Item column, enter the Learner ID. For each additional individual, choose Learner ID in the Data Item column and enter the additional Learner ID numbers.

10. When finished entering all Learner ID numbers, click Next at the bottom of the screen to continue.
11. On the next screen, review your work. If you notice an error, click back to edit (use this feature only when you have less than 5 entries because it removes all your previous entries. If you have more than 5, note the error and click Next. You can correct the errors after testing the Flexi Group.)

12. Click Next to Test the Next Flexi Group. This will show if your entries were done correctly.

13. Review your list to ensure the course you added part of the list. If everything is correct, click the Flexi-Group Where Used tab to see who can view these individuals training records in Learn@ISU.
14. If you have changes/corrections, click on the Filters tab and go back to the filters. Find your changes/corrections and do one of the following to make the change/correction.
   - You can locate the error in the Value(s) column and update (If you have many records, use Control + F (PC) or Command + F (Mac) and type in the value and then change it. Once you are done, click Next to continue.

15. You can check the box in the Column with the red X to delete the incorrect entry. Once you have checked all incorrect entries, click Next to continue. Follow steps 11-13 from above to complete the process.

16. Once you have completed your entries, click on the Home link in the upper left-hand corner of the screen.
Deleting Individuals from a Flexi Group

1. Access Learn@ISU
2. Click on Manager Main Menu and choose Administration (this may look different based on your permission level in Learn@ISU, however Flexi Groups are always in the Administration tab.

3. On the Administration Menu, click on the Flexi Group Learners link.

4. Choose the link that your group is a part of to continue. (Learn@ISU will share this with you when you are granted access).
5. In the Search box, type the name of your group, then click Go.

6. Find your group and click on the icon to access your group. Please note, do not select a group that has an individual’s 9-digit UID number after their name. Those groups are updated by the system on a daily basis.
7. Next, review the name at the top to ensure you have selected the correct group. If you do not, click on the back button in your browser and search again. If you do, click Next to continue. Do not make any changes here.

8. Click on the Filters tab across the top to access your learners.

9. Find the learner by their Learner ID (9-digit UID) by searching using either Control + F (PC) or Command + F (Mac). Once the Learner ID has been located in the list, click on the box under the red x column. This marks the individual to be removed from the Flexi Group. Continue to do this for everyone you need to delete.

10. Once you have everyone marked for removal, click Next at the bottom of the page.
11. Click Next to Test the Next Flexi Group. This will show if your entries were done correctly.

12. Review your list to ensure the course you added part of the list. If everything is correct, click the Flexi-Group Where Used tab to see who can view these individuals training...
records in Learn@ISU. If you need to correct, click on the Filters tab and then follow steps 10-12 to complete the process.

13. Once you have completed your entries, click on the Home link in the upper left-hand corner of the screen.
Adding Courses to Flexi Groups

1. Access Learn@ISU
2. Click on Manager Main Menu and choose Administration (this may look different based on your permission level in Learn@ISU, however Flexi Groups are always in the Administration tab.

3. On the Administration Menu, you will have three links, choose **Courses**:
   - Flexi-Group Manager – Courses (groups set up using specific courses)
   - Flexi-Group Manager – Learners (groups set up using individual ID numbers)
   - Flexi-Group Manager – Catalogs (groups set up using specific catalogs of courses).

   Learn@ISU will complete the initial set up of your group, this includes:
   - Entering the type of group, name of the group (supplied by you) and assigning the group to the correct individuals.

4. Choose the link that your group is a part of to continue (Learn@ISU will share this with you when you are granted access).
5. In the Search box, type the name of your group, then click Go.

6. Find your group and click on the icon to access your group. Please note, do not select a group that has an individual’s 9-digit UID number after their name. Those groups are updated by the system on a daily basis.

7. Next, review the name at the top to ensure you have selected the correct group. If you do not, click on the back button in your browser and search again. If you do, click Next to continue. Do not make any changes here.
8. Click on the Filters tab across the top to access your courses.

9. To add a new course – scroll to the bottom of the page and choose Course ID in the Data Item column, enter the Course ID. For each additional course, choose Course ID in the Data Item column and enter the additional Course ID numbers. Please note, this is not a case sensitive field.

10. When finished entering all Course ID numbers, click Next at the bottom of the screen to continue.

11. On the next screen, review your work. If you notice an error, click back to edit (use this feature only when you have less than 5 entries because it removes all your previous entries. If you have more than 5, note the error and click Next. You can correct the errors after testing the Flexi Group.)

12. Click Next to Test the Next Flexi Group. This will show if your entries were done correctly.
13. Review your list to ensure the course you added part of the list. If everything is correct, click the Flexi-Group Where Used tab to see who can view these individuals training records in Learn@ISU.

14. If you have changes/corrections, click on the Filters tab and go back to the filters. Find your changes/corrections and do one of the following to make the change/correction.
   - You can locate the error in the Value(s) column and update (If you have many records, use Control + F (PC) or Command + F (Mac) and type in the value and then change it. Once you are done, click Next to continue.

15. You can check the box in the Column with the red X to delete the incorrect entry. Once you have checked all incorrect entries, click Next to continue. Follow steps 11-13 from above to complete the process.

16. Once you have completed your entries, click on the Home link in the upper left-hand corner of the screen.

**Deleting Courses from a Flexi Group**
1. Access Learn@ISU
2. Click on Manager Main Menu and choose Administration (this may look different based on your permission level in Learn@ISU, however Flexi Groups are always in the Administration tab.

3. On the Administration Menu, click on the Flexi Group Learners link.

4. Choose the link that your group is a part of to continue. (Learn@ISU will share this with you when you are granted access).
5. In the Search box, type the name of your group, then click Go.

6. Find your group and click on the icon to access your group. Please note, do not select a group that has an individual’s 9-digit UID number after their name. Those groups are updated by the system on a daily basis.

7. Next, review the name at the top to ensure you have selected the correct group. If you do not, click on the back button in your browser and search again. If you do, click Next to continue. Do not make any changes here.
8. Click on the Filters tab across the top to access your courses.

9. Find the course by the Course ID by searching using either Control + F (PC) or Command + F (Mac). Once the Course ID has been located in the list, click on the box under the red x column. This marks the course to be removed from the Flexi Group. Continue to do this for every course need to delete.

10. Once you have all courses marked for removal, click Next at the bottom of the page.

11. Click Next to Test the Next Flexi Group. This will show if your entries were done correctly.

12. Review your list to ensure the course you removed is no longer part of the list. If everything is correct, click the Flexi-Group Where Used tab to see who can view these courses are being used in Learn@ISU. If you need to make changes, click on the Filters tab to make changes. Then follow steps 10-12 to complete.
13. Once you have completed your entries, click on the Home link in the upper left-hand corner of the screen
Adding Catalogs to Flexi Groups

1. Access Learn@ISU
2. Click on Manager Main Menu and choose Administration (this may look different based on your permission level in Learn@ISU, however Flexi Groups are always in the Administration tab.

3. On the Administration Menu, you will have three links, choose Catalogs:
   - Flexi-Group Manager – Courses (groups set up using specific courses)
   - Flexi-Group Manager – Learners (groups set up using individual ID numbers)
   - Flexi-Group Manager – Catalogs (groups set up using specific catalogs of courses).

Learn@ISU will complete the initial set up of your group, this includes:

- Entering the type of group, name of the group (supplied by you) and assigning the group to the correct individuals.

4. Choose the link that your group is a part of to continue (Learn@ISU will share this with you when you are granted access).
5. In the Search box, type the name of your group, then click Go.

6. Find your group and click on the icon to access your group. Please note, do not select a group that has an individual's 9-digit UID number after their name. Those groups are updated by the system on a daily basis.

7. Next, review the name at the top to ensure you have selected the correct group. If you do not, click on the back button in your browser and search again. If you do, click Next to continue. Do not make any changes here.
8. Click on the Filters tab across the top to access your courses.
9. To add a new course – scroll to the bottom of the page and choose Catalog ID in the Data Item column, enter the Catalog ID. For each additional course, choose Course ID in the Data Item column and enter the additional Catalog ID number. Please note, this is not a case sensitive field.

10. When finished entering all Catalog ID number, click Next at the bottom of the screen to continue.
11. On the next screen, review your work. If you notice an error, click back to edit (use this feature only when you have less than 5 entries because it removes all your previous entries. If you have more than 5, note the error and click Next. You can correct the errors after testing the Flexi Group.)

12. Click Next to Test the Next Flexi Group. This will show if your entries were done correctly.

13. Review your list to ensure the course you added part of the list. If everything is correct, click the Flexi-Group Where Used tab to see who can view these individuals training records in Learn@ISU.
14. If you have changes/corrections, click on the Filters tab and go back to the filters. Find your changes/corrections and do one of the following to make the change/correction.
   - You can locate the error in the Value(s) column and update (If you have many records, use Control + F (PC) or Command + F (Mac) and type in the value and then change it. Once you are done, click Next to continue.
15. You can check the box in the Column with the red X to delete the incorrect entry. Once you have checked all incorrect entries, click Next to continue. Follow steps 11-13 from above to complete the process.

16. Once you have completed your entries, click on the Home link in the upper left-hand corner of the screen.
Deleting Catalogs from a Flexi Group

1. Access Learn@ISU
2. Click on Manager Main Menu and choose Administration (this may look different based on your permission level in Learn@ISU, however Flexi Groups are always in the Administration tab.

3. On the Administration Menu, click on the Flexi Group Catalogs link.

4. Choose the link that your group is a part of to continue. (Learn@ISU will share this with you when you are granted access).
5. In the Search box, type the name of your group, then click Go.

6. Find your group and click on the icon to access your group. Please note, do not select a group that has an individual’s 9-digit UID number after their name. Those groups are updated by the system on a daily basis.

7. Next, review the name at the top to ensure you have selected the correct group. If you do not, click on the back button in your browser and search again. If you do, click Next to continue. Do not make any changes here.

8. Click on the Filters tab across the top to access your courses.
9. Find the course by the Course ID by searching using either Control + F (PC) or Command + F (Mac). Once the Course ID has been located in the list, click on the box under the red x column. This marks the course to be removed from the Flexi Group. Continue to do this for every course need to delete.

10. Once you have all catalogs marked for removal, click Next at the bottom of the page.
11. Click Next to Test the Next Flexi Group. This will show if your entries were done correctly.

12. Review your list to ensure the catalog you removed is no longer part of the list. If everything is correct, click the Flexi-Group Where Used tab to see who can view these catalogs are being used in Learn@ISU. If you need to make changes, click on the Filters tab to make changes. Then follow steps 10-12 to complete.

13. Once you have completed your entries, click on the Home link in the upper left-hand corner of the screen.