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Reports

Reports are used to query information from the system. There is a several prebuilt reports. The most commonly used reports is Training Tracking by Course.

1. Click on the name of the report you would like to use.
2. Click on Show All to view results for all people to which you have access.
3. Click on Add New Filter to create your own custom filter for the report format.

The Report feature is best learned by practicing. The default filters (Show All) cannot be deleted. Only you can view and edit the filters you create. You can view and potentially edit reports owned by another person if that person has the ability to share their reports. You can export your results to Excel or to a printer.
Courses
Courses houses information about your courses.

Toolbar Icons

The toolbar icons are used to help you filter through information. The icons, in order are:

Add a new course – Use to add a new course
Edit Filter – Edit a filter you have created.
Add Filter – Create a filter to narrow down the list of courses in view
Filter Pick List – list of filters you have created in addition to the system default of Show All
Search Bar – enter a string of letters into the search field and click on Go. Click on Reset to clear the search field. Note: searches are preserved and will remain until you reset the field regardless of logout or viewing of another system feature.
Print – Prints the information displayed. Note there is a limitation on amount of data that can be printed.
Export to Excel – Exports the information displayed to Excel. Note there is a limitation on amount of data that can be exported.

Add a Course
Follow these steps to add a course to the system.

1. Go to Manager Menu > Courses
2. Click on the add icon to open the Add Course pop-up window.
3. Choose the type of course you want to add and click Next. The type of course you choose indicates how the course is treated by the system. Choose one of the following based on your needs: Scheduled Training for classroom or Generic On-Line Training for web-based training.
4. Fill in as much information as you can when adding a course. Course ID is a primary key in the system and is a unique identifier for a course.
View Course Information

Click on the name of the course or on the icon in the Action Column to view information about a course. You will be able to view Properties, Course Workflows, Sessions, History, Competencies, Equivalents, Question Bank, Assessments, Trainers, Documents, Where Used

Properties – Displays the course demographic information.

Course Workflows –

Sessions – Use the add icon to add a session to a class. Use this feature for classroom series that contain multiple sessions a learner must attend in order to receive credit for the course.

History – Displays the history of the course. Click on the icon to view information about each entry. A pop-up window will open. The tabs, Properties, Assessments, Documents, Approval Queue, Workflow Queue, Audit, Communications and History Log contain information about the history for each entry. Not all tabs will contain information. The Properties tab will display how well a learner completed a course/class. The Assessment tab displays the results of any tests built and distributed through Learn@ISU.

Equivalents –

Question Banks – Used to create questions to use as an assessment (test/quiz)

Assessments – Used to create and define the parameters of an assessment (test/quiz)

Trainers – Use to define the trainers for a course. Click on the add icon. Choose the name out of the list on the left and move to the list on the right. Click on Next.

Documents – Use to add documents to your course. These documents are available to learners through the course link in the catalog and on schedule. Select the add icon and follow the steps for adding a document. Upload only those documents that are not easily changed such as PDF.

Where Used – Shows where the course is used.
Catalog Manager

Catalog Manager houses information about your catalogs. A catalog can be best described as the feature that used to maintain who can see which course for your training area.

Toolbar Icons

The toolbar icons are used to help you filter through information. The icons, in order are:

Add a new catalog – Use to add a new catalog

Search Bar – enter a string of letters into the search field and click on Go. Click on Reset to clear the search field. Note: searches are preserved and will remain until you reset the field regardless of logout or viewing of another system feature.

Print – Prints the information displayed. Note there is a limitation on amount of data that can be printed.

Export to Excel – Exports the information displayed to Excel. Note there is a limitation on amount of data that can be exported.

Add a Catalog

Follow these steps to add a catalog to the system.

1. Go to Manager Menu > Catalog Manager
2. Click on the add icon to open the Add Catalog pop-up window.
3. Choose the type of catalog you want to add and click Next. The type of catalog you choose indicates how the catalog is treated by the system.
4. Fill in the following information when adding a catalog.
   a. Catalog ID – Catalog ID is a unique identifier for a catalog. This is the three letters defined to represent your training area.
   b. Catalog Name – Give it the name of your department/unit providing the training
   c. Training Area Key – be sure to choose your training area or you will not be able to manage your own catalog.
View Catalog Information

Click on the name of the catalog or on thepector icon in the Action Column to view information about a catalog. You will be able to view and manage Properties, Courses, People, Assignment Criteria, and Group Documents.

Properties – Displays the catalog demographic information.

Courses – Use to add or remove a course from the catalog. Click on the add icon to add a course to the catalog. Follow the instructions in the pop-up window. Click on the icon to remove a course from a catalog.

People – Use to allow learners to view the catalog by adding one at a time. Click on the add icon to add a person to the catalog. Follow the instructions in the pop-up window. Click on the icon to remove a person from a catalog.

Assignment Criteria – Used to allow groups of learners to view the catalog by adding a group at a time. Click on the add icon to add a group to the catalog. Follow the instructions in the pop-up window. Click on the icon to remove a group from a catalog.

Group Documents – Not used at this point
Master Schedule

Master Schedule is used to manage classroom courses.

Toolbar Icons

The toolbar icons are used to help you filter through information. The icons, in order are:

Add a Training Event – Use to add a new training event to the Master Schedule.

Event Listing – Provides a list view of Master Schedule.

Calendar View – Provides a calendar view of Master Schedule

Search by Location View – These two pulldowns allows you to search by Location and venue

Search Bar – enter a string of letters into the search field and click on Go. Click on Reset to clear the search field. Note: searches are preserved and will remain until you reset the field regardless of logout or viewing of another system feature.

Add a Class to the Schedule

Follow these step to add a class to the schedule.

1. Go to Manager Menu > Master Schedule
2. Use the green plus sign to add a class to the schedule.
3. Choose Training Event and then select Next.
4. Enter in the Course ID. If you do not know the course ID, enter in as much as you do know and then select Next. OR you can choose to only select Next to get to a list of all the courses.
5. Select the course you are looking for. Fill in information for the following fields. Click on Next.
   a. Start date – Use calendar icon
   b. Start time – Must designate AM or PM. For example 11:00am
   c. Delivery – Choose Instructor Led.
   d. Time zone – leave preset to be Central Standard
   e. Location and Venue – Choose building and room number from pull down lists
   f. Show in StoreFront – leave preset NO
   g. Trainer – Choose the trainer(s) from the list.
6. Choose **Save the class and exit the wizard**. Select **Next**. The class has been added to the Master Schedule and you are automatically routed to the Master Schedule class properties tab.

**Scheduling Class Sessions with Multiple Topics**

Use the Sessions tab to schedule training topics for a class (such as an all-day training) for which more than one topic is presented. The Session tab can also be used to schedule more than one session for the same topic (such as a two day workshop) allowing participants to register for one or both sessions.

**Scheduling topics (courses) for a one day training**

Select the class on Master Schedule and select the Sessions tab.

Click on the ![icon](image) icon in the Action column. This opens the information screen for this session.

Select the Topics tab and then the green plus sign to add a topic (course).

Fill in at least one field to narrow your search for a class course ID to add as a topic and then select **Next**. If you only select **Next** you will be able to select from the entire list of courses.
Click on the course you want to include as a topic. You may choose more than one course by holding down the control key on your keyboard as you choose each title from the list. After making your choices, select Next.

Review your choices. If you are satisfied with your choices select Next. If you are not choose Back or Reset and start over.

The courses you chose are now listed under the Topics tab. Choose the red X to delete a topic. Open each topic by selecting the action icon in the Action column to view the information for each session.

You will be able to add or modify the Display sequence number. This number will determine what order the topics are listed in. You may also enter Topic Description information using this screen. Select Save to save changes and then select Close Window to close the window and return to the session screen.
**User Guide:**

**LEARN@ISU: Department Training Coordinator**

**Scheduling Sessions for a Workshop/Multi-day Training**

Choose the class on Master Schedule and select the Sessions tab.

<table>
<thead>
<tr>
<th>Session Number</th>
<th>Session Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Delivery</th>
<th>Location</th>
<th>Venue</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>One Day Event</td>
<td>12/26/2014</td>
<td>12/26/2014</td>
<td>Instructor Led</td>
<td>EHS Services Building</td>
<td>Room 1230</td>
<td></td>
</tr>
</tbody>
</table>

Use the green plus sign to add a session.

1. Enter information for the required fields.
2. Set the time zone.
3. Choose Location and Venue to set building and room.
4. Fill in other information as needed.

![Add Session Form](image)

Two sessions now appear under the Sessions tab and on the Master Schedule.

<table>
<thead>
<tr>
<th>Session Number</th>
<th>Session Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Delivery</th>
<th>Location</th>
<th>Venue</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>One Day Event</td>
<td>12/26/2014</td>
<td>12/26/2014</td>
<td>Instructor Led</td>
<td>EHS Services Building</td>
<td>Room 1230</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Two Day Event</td>
<td>12/26/2014</td>
<td>12/29/2014</td>
<td>Instructor Led</td>
<td>EHS Services Building</td>
<td>Room 1230</td>
<td></td>
</tr>
</tbody>
</table>

Participants that sign up will automatically be signed up for both sessions. The email notification provides a link participants can use to place a reminder on their calendars.

Choose the red X to delete a session. Be sure to communicate changes made in sessions to everyone enrolled in the class. The system does not have automated communication to cover this instance of making changes on Master Schedule.
Delete a Class from the Schedule

In the event you add a class to the schedule and then need to remove it, PRIOR to anyone enrolling in it, delete the class using the following steps.

1. Contact Learn@ISU help email. learnisu@iastate.edu.
2. Provide the following information:
   a. Your training area
   b. Verify no one had enrolled in the class
   c. Name of the class
   d. Date and time for which the class was scheduled

Managing Class Information on Master Schedule

Use the information in this section to make one time changes to class information, add trainers, and add class documents.

Editing Class Information

Use the Properties tab to review and edit class information. Much of the information found on this tab is visible through the user menu schedule.
Refer to the image for location of each field on the Properties tab as you review the table of field definitions. Review and understand this information before making any changes to a class posted on Master Schedule.

Note: When making changes to any of the fields select **Save** to save your changes **BEFORE** moving to another screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course ID</td>
<td>This is the unique identification number for the course used to track everything about the course. This field is automatically filled when the class is added to the schedule and cannot be changed.</td>
</tr>
<tr>
<td>Course Title</td>
<td>This field is automatically filled when the class is added to the schedule and cannot be changed.</td>
</tr>
<tr>
<td>Status</td>
<td>Indicates the state of the class. This field determines display on the user schedule.</td>
</tr>
<tr>
<td>Class Title</td>
<td>Similar to the Course Title field. This field is automatically filled when the class is added to the schedule and can be changed although we typically do not.</td>
</tr>
<tr>
<td>Description</td>
<td>This field is automatically filled when the class is added to the schedule. Edits can be made to this field as needed.</td>
</tr>
<tr>
<td>Class Type Name</td>
<td>This field is automatically filled when the class is added to the schedule and cannot be changed.</td>
</tr>
<tr>
<td>Enrollment Rule</td>
<td>This field is automatically filled when the class is added to the schedule. Enrollment rule can be changed.</td>
</tr>
<tr>
<td>Start Date</td>
<td>This field is automatically filled when the class is added to the schedule and cannot be changed on this tab. See <em>Modifying Scheduled Class Time and Location</em>.</td>
</tr>
<tr>
<td>Start Time</td>
<td>This field is automatically filled when the class is added to the schedule and cannot be changed on this tab. See <em>Modifying Scheduled Class Time and Location</em>.</td>
</tr>
<tr>
<td>End Date</td>
<td>This field is automatically filled when the class is added to the schedule and cannot be changed on this tab. See <em>Modifying Scheduled Class Time and Location</em>.</td>
</tr>
<tr>
<td>End Time</td>
<td>This field is automatically filled when the class is added to the schedule. End time can be modified.</td>
</tr>
<tr>
<td>Registration Opens</td>
<td>This field is automatically filled when the class is added to the schedule. Use the calendar feature to change the date as needed.</td>
</tr>
<tr>
<td>Registration Closes</td>
<td>This field is automatically filled when the class is added to the schedule. Use the calendar feature to change the date as needed.</td>
</tr>
<tr>
<td>Minimum Class Size</td>
<td>This field is automatically filled when the class is added to the schedule. The number can be adjusted.</td>
</tr>
</tbody>
</table>
User Guide: LEARN@ISU: Department Training Coordinator

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Class Size</td>
<td>This field is automatically filled when the class is added to the schedule. The number can be adjusted.</td>
</tr>
<tr>
<td>Waitlist Size</td>
<td>This field is automatically filled when the class is added to the schedule. The number can be adjusted.</td>
</tr>
<tr>
<td>Duration</td>
<td>This field is automatically filled when the class is added to the schedule. The number can be adjusted.</td>
</tr>
<tr>
<td>Directions</td>
<td>Enter special information into this field if needed. It will display to the user when registering for the class.</td>
</tr>
</tbody>
</table>

Modifying Scheduled Class Time and Location
Use the Sessions tab to modify changes to a scheduled class time and location prior to anyone enrolling in the class. Use the Event Workflow tab to modify a schedule class time after participants have enrolled in the class. Using the Event Workflow tab will allow you to send the required email notification to participants.

Using the Sessions Tab:

Click on the icon in the Action column. This opens the information screen for this session.

1. Edit the fields as needed.
2. Enter information in the Other Information field. This information should pertain to this session.
3. Select Save to make changes.
Using the Event Workflow Tab:

Go to the Event Workflow tab. Choose Reschedule Event to open the Class Reschedule window.

1. Enter the new **Start Date** and **Start Time**.
2. Choose the **Class Reschedule** email template.
3. Choose the **Email From Address**. You may have more choices than what appear here.
4. Enter the **Reschedule Reason**.
5. Choose a workflow from each of the grouped radio buttons.

Select **Next** after completing the fields on the Class Reschedule screen. The screen will close and the class will appear on the schedule for the new date. Email notification will be sent to participants only if you chose a workflow that included email notification.
Cancel a Scheduled Class

Use the Event Workflow tab to cancel a scheduled class in which participants have enrolled.

Choose Cancel Event.

1. Choose the Cancellation Confirmation email template.
2. Choose the Email From Address. You may have more choices than what appear here.
3. Enter the Cancellation Reason.
4. Choose a workflow by selecting one of the radio buttons.

Select Next after completing the fields on the Class Cancellation screen. The screen will close, the class will be removed from the Master Schedule. Email notification will be sent to participants only if you chose a workflow that included email notification.
Updating Trainer Information

Update trainer information by using the **Trainers** tab.

If scheduling multiple sessions, select a training for each session.

To add additional trainers select the green plus sign. Check the **Show All Trainers** box to view all trainers.

To add a trainer, select the trainer from the column on the left side of the window and then select the **Add>>** button.

To remove a trainer, select the trainer from the column on the right side of the window and then select the **<<Remove** button.

Use the **Move Up** and **Move Down** buttons to reorder the trainers.

After making changes, select the **Next** button.

Select the **Close Window** button. This closes the wizard and lists the trainer under the Trainers tab on the Master Schedule Course screen.
Class Documents

Use the **Class Documents** tab to post documents for a class. Materials posted through this tab will be available to participants to download or print.

Select the green plus sign to add a document. This will open the **Add Document** window.

Choose the **Document Type** and select **Next**.

Enter the document title, upload the document file and select **Next**. The window will close and the document will be posted.

Select the red **X** to delete a document.
Manage Class Enrollment Events

Although this system is designed for participants to manage their own training accounts there will be instances where you will have to manage enrollment events. Use the Allocate Seats tab, Participants tab, and Event Workflow tab to manage class enrollment events.

Reserve Seats

Use the Allocate Seats tab to reserve seats for a group. Participants will not be able to sign up for the class unless they are part of one of the groups designated using this tab. Use the following instructions to reserve seats for a group.

Select the green plus sign to add a group.

Use the Flexi-Group list to choose the group for which you wish to reserve seats. All flexi-groups appear in this list. Enter a value for the number of seats reserved in the Maximum Size field. This is the maximum number of seats that will be held for that group. You may also enter a value in the Display Sequence field. This is not required and only affect the order the groups are displayed under the Allocate Seats tab. Remember to save your changes clicking on to another tab.

Once you have reserved some of the seats you will need to assign the rest of the seats to another group. Follow the same steps as above and use All Users as the flexi-group. This will open up the remaining seats to the rest of the university.

Enroll Participants

Unless otherwise configured, classes are set up for participants to self-enroll. For instances when participants need help enrolling or enrollment is restricted use the Participants tab or the Event Workflow tab to enroll participants in a class.
If using the **Participants** tab select the green plus sign to add a person to the class.

If using the **Event Workflow** tab select **Event Enrollment**. Opening Event Enrollment opens the exact same workflow window as using the Participants tab.

Use the following instructions to add a participant to a class.

Once you have opened the Training Event Enrollment screen, enter a search parameter. The most used two are Learner ID and Last Name. This example shows searching by last name. After entering the search information select **Next**.
Choose the name of the person you are looking for by clicking on the person’s name. This will highlight the person’s name in blue. To select more than one person from the list hold down the control key on your keyboard as you click on names. Each will be highlighted in blue. Once you have finished making your selections, click on Next.

Choose one of the options on this screen. The option you choose will be dependent on the circumstances under which you are adding a participant to the class. Click on Next to complete the enrollment action.

The Participants tab is displayed and the person has been added to the class.
Managing a Participant’s Enrollment Status

Use the Participants Tab to manage a single person’s enrollment status.

Removing a Participant

Delete participants only if they were added to a class by mistake. Open the participant tab. Find the name of the participant to delete and select the red X. Follow the instructions displayed in the delete confirmation window.

Modifying Waitlist and Cancel Enrollment Status

Instructions

- Find the name of the person. Click on the green icon to the right of the participant’s name to open the screen to open the edit screen.
- Change the Status to the desired label.
- Save changes.
- Use the Event Workflow Email Participants tab to send a confirmation email to the participant.

Waitlisted Participants

Most classes are set up with a waitlist. The waitlist is designed to automatically move participants from waitlisted status to enrolled status if someone cancels from the class or the maximum class size is increased. Follow the instructions above to change a participant’s status from Waitlisted to Enrolled.

Canceling a Participant’s Enrollment

Most classes are configured so that participants can cancel their own enrollment. Occasionally a class is configures so that participants are unable to cancel their own enrollment or participants may not understand how to cancel their own enrollment. Follow the instructions above to cancel a participant’s enrollment from a class.
Email Communications

LEARN@ISU pushes out automated emails whose delivery is triggered by participant-driven events such as enrolling in or canceling from a class. Most of the emails surrounding management of a scheduled class are manually sent to the participants using the Event Workflow tab. Use the following instructions to send email reminders to participants.

Open Email Participants

Choose the participants from the Learners field and the email template from the Email Templates field. Choose more than one participant by holding down the control key on your keyboard as you click on the names. Click on Next to continue.
Check over the information displayed on this screen. You may enter an email address in the CC Other field. You may choose to email Manager. Since the body of the emails are preset do not modify unless absolutely necessary. Select Next to send the email.

Use this screen to choose to send another email or to return to the Event Workflow page. Select Next to complete this action.
Printing Class Rosters

Open the Event Workflow Tab. Choose Print Class Roster from the list. The roster will open in a new window. Use your web browser functions to print or save the roster. Choose Print Blank Roster to print addition sign in sheets for a class.

Record Class Enrollment

Use the Event Update feature on the Event Workflow tab and the following steps to record enrollment for a class that has been held.

Open Event Update. This will open a series of screens used to record enrollment. Please have the signed class roster to use as a guide to determine which participants attend the class.

The class roster orders name alphabetically. Choose order By Last Name and select Next.
Set the **Default Values**. Go through the roster and for anyone not signed in change their **Status** value to **No Show** and **Pass/Fail** value to **N/A**. Select **Next** to record the enrollment. Select Close Window to return to the Event Workflow tab.

**NOTE:** More than one column will appear for classes that have multiple topics. Record **Status** and **Pass/Fail** values for each of the topics.