05 Catalog Manager

LWC-105.14.01

COURSE DESCRIPTION: This course shows how to organize courses, classes and other events into Catalogs and Learning Tracks. Students learn how to create catalogs and learning tracks, add the required collection of courses, assign a Flexi-Group and review a basic overview of how email notifications work.
Learning occurs in various ways and never with just a single type of delivery. LearnerWeb offers flexibility with it comes to managing these different types of learning – instructor-led, self-paced, text-based, video lessons and on-the-job training. It easy to manage handful of courses, but what happens when there are hundreds of courses? This is when Catalog Manager becomes important. Built into the LMS is Catalog Manager, a special manager used to create and manage collections of learning materials.

**Catalogs and Learning Tracks**

LearnerWeb provides two ways to organize and collect learning classes and courses, either as Catalogs or Learning Tracks. The main difference between the two is simple – Learning Tracks contain required training that must be completed, such as compliance courses that must be completed before an Expiry Date, while Catalogs maintain a collection of learning contents without time-sensitive assignments.

Click on Catalog Manager from the Manager menu. This opens the Catalog Manager page. As illustrated below, the column **Catalog Type Name** shows which collection is a Catalog or a Learning Track.

Without this column, it is impossible to tell the difference unless alphanumeric values assigned as Catalog IDs include some way to know, such as LT-XXX for Learning Tracks and CA-XXX for Catalogs. Now, let’s take a closer look at both of these types. **TIP:** Catalogs and Learning Track display a number of related Tabs across the top of the page, which work the same way for both.
Click on the Green-i icon for one of the existing Catalogs displayed on the Catalog Manager page. The Catalog page opens, revealing a number of tabs across the top, each presenting information about the Catalog when the tab is clicked.

By default, the PEOPLE tab is opened. In this example only one person is assigned to the Catalog. Note the column COMPLETION STATUS NAME show INCOMPLETE. LearnerWeb does track the status of courses inside a Catalog but it doesn’t have a required date/time to complete the course.

Now click on the Green-i icon for a Learning Track, such as ORIENTATION TRAINING, as in this example. The details about the selected Learning Track open by default to the PEOPLE tab. It reveals the people who are currently assigned to the Learning Track (LearnerIDs and Names have been adjusted to maintain privacy).

Notice that Learning Tracks and Catalogs include a column labeled Completion Status Name. It is designed to track whether or not a Learner has completed the assigned training. The difference is that Learning Tracks contains course that have mandatory completion requirements. Courses inside a Track may have different target dates of when the training must be completed. LearnerWeb can be set up to send reminders as the Learner approaches or exceeds Expiry Dates.
TIP: You can add a person to this Learning Track by clicking on the Green Plus symbol (⁺) while on this page, which is also true when working on the similar Catalog page.

Next, click on the ASSIGNMENT CRITERIA tab.

Course inside this Learning Track can be automatically assigned to a group of people, using something called Flexi-Groups, an automated process of identifying specific Learners on the LMS. In this example, this Learning Track is automatically assigned to people in Transportation Services, as denoted in the Flexi-Group Name column. A quick search reveals the Flexi-Group is made up of people in the Transportation Department. TIP: Please take the time to review the separate course on the topic of Flexi-Groups.

Now click on the COURSE tab. This is where to find all of the courses associated with the Learning Track. Once again, the courses here are required and may have an Assignment Due date set, often associated with Expiry Dates and compliance requirement deadlines.

TIP: As in all the other forms, clicking on the Green Plus symbol (⁺) is how to add a new record for the opened tab. In this case, pressing this icon would add a course to this Learning Track.
Finally, click on the PROPERTIES tab to review the initial settings associated with the Learning Track. Note how the Catalog Type is set to LEARNING TRACK, the Status is set to ACTIVE and in one of the images, the Learning Track is assigned to specific DOMAIN.

**TIP:** LearnerWeb can be set up to be multi-tenant or multiple domains, which means a single installation can house separate companies, each with their own private entry, branding and user interface.

**Create a Catalog or Learning Track**
The process is the same when creating a Catalog or Learning Track. Start by clicking on Catalog Manager from the Manager menu. When ready, press the Green Plus symbol (+) to start the ADD CATALOG WIZARD.

There are a number of options in this illustration, which may not be available with your implementation. Of importance here are the two options, Catalog and Learning Track. Both are created the same way. So go ahead and select Learning Track. Press the NEXT button to continue.
Fill out all of the required fields. Keep in mind that all of the other fields can be filled out later. When ready, press the SAVE AND CLOSE WINDOW button.

The new Learning Track is created. Click on the Green-i icon to start assigning courses and people.

The PEOPLE tab opens. Click on the Green Plus symbol (+) to start the wizard. The first step is to search for Learners. Leave the fields blank and press the NEXT button to display everyone on the LMS.

TIP: To reduce the time, enter a partial text or number to limit the search results.
A list of people display. Use the combination of the mouse plus the CTRL key to select multiple people or click in the SELECT ALL box to select everyone on the list. Press the NEXT button to continue.

The selected people will be listed in the next step. If some people are missing, click on the ADD MORE PEOPLE radio button and press NEXT to return to the list. Otherwise, the UPDATE LEARNING TRACK option is already selected, so press NEXT to complete the process.

The final step is to set the Date assigned and whether to send an email notification. In this example, an email isn't going to be sent. Press the NEXT button to continue.
The confirmation box shows how many people were added to the Learning Track, and if any people were skipped (this may be because the person had previously been added to the Track). Press the NEXT button to end the task.

The people Assigned to this Learning Track are now displayed inside the People page.

**Assign a Flexi-Group**

As stated before, a Flexi-Group is a dynamic way to identify a specific group of people, courses or catalogs. For example, a Flexi-Group for people can select everyone on the system now and in the future.

Click on the ASSIGNMENT CRITERIA tab and notice how there isn’t any assigned selection criteria. Press the Green Plus symbol (+) to continue. Click to expand the drop-down menu and select an existing group, such as ALL USERS. Press the NEXT button to continue.
The Flexi-Group ALL USERS is now applied to this Learning Track. Press the CLOSE WINDOW button to close.

Now the ALL USERS flexi-group is assigned to the Learning Track. TIP: If you just add new people to the LMS, click on the WAND icon inside the Assignment Criteria tab. This ensures the new people are part of the group and can see schedule calendar events.

Add Courses to Learning Track
The process of adding a course to a Catalog or Learning Track is the same. Since a new Learning Track has been created and people assigned to the Track, let's select a few courses for the Track. If the Learning Track isn't opened, select CATALOG MANAGER from the Manager menu, select the target Learning Track and then on the COURSES tab.

When ready, click on the Green Plus symbol (+). This opens the Wizard. By default, the COURSE option is already selected. Press the NEXT button to continue.
To narrow the search for the courses, a partial entry, SAF, is typed inside the Course ID field. Another option to reduce the number of courses that LearnerWeb will identify is to choose something from one or both drop-down lists for COURSE TYPE and COURSE UNIT TYPE. **TIP:** As a reminder for all similar forms, leaving all the fields blank returns everything available, but it may take LearnerWeb little longer to produce the list.

Press the NEXT button to continue.

In this example, three courses with Course IDs that include SAF are found. Click inside the box for the SELECT ALL option and all three courses are selected. An alternative is to use the mouse plus the CTRL key to manually select courses from the list. Press the NEXT button to proceed.
The final confirmation step displays the selected courses, along with a few assignment fields. Most of these fields can be left blank and defined later, as required. Here is a quick summary for each option:

**Required** – Select NO or Yes to make this a required courses inside the Learning Track.

**Days Due from Assignment** – Enter the number of days the course must be completed. The value is added to the day the courses are assigned. For example, 30 entered in this field would be 30 days from the day the courses are assigned.

**Date Due** – An alternative to calculating a date is to enter and actual date. Click on the Calendar icon to choose a date.

**Enrollment Rule** – By default, the SAME AS COURSE is select, meaning that these new courses would be assigned the same enrollment rule as the other courses in the Learning Track. Choose from the drop-down list if these courses are to have a different rule. **TIP:** Enrollment rules can always be changed for an individual course in the Learning Track, at any time.

**Credit Amount** – Enter a value if the courses earn credits, such as a Learning Unit, CEU (Continuing Education Unit) or PDH (Professional Development Hour). Leave blank if there are no earned credits associated with the course.

**Update Level** – Set to System Only, this option sets who can update the assignments.

When ready, press the NEXT button to continue.
Choose whether or not to notify Learners assigned to the Catalog or Learning Track that new courses have been added to. Keep in mind that this may result in hundreds or more emails. Click on the CLOSE WINDOW button to complete the process. **TIP:** Please refer to the Email Templates and Communication Manager for details on how to set up email notifications.

The Courses page for the opened Learning Track is now updated. To modify any assigned setting for an individual course, click on the Action icon on the far right. This opens a form where values can be assigned or modified. Click on the SAVE button to apply the changes, and then CLOSE WINDOW to exit the form.

In this example, a Due Date was assigned. The clock now starts for all the Learners assigned to the Learning Track.
Now when one of the Learners logs into LearnerWeb, the Learning Track displays inside the MY REQUIREMENTS page.

Managers and System Administrator can click on PEOPLE, and then select the Learner to review the status, whether or not the required courses have been started, in progress or completed.

Managers and System Administrators can also generate a report to review progress by course or by student.

**TIP:** Please review the course on Reports to see the full details.