Iowa State University is your one-stop site for valuable life skills. The courses you’ll find here are designed to help you develop your professional skills and advance your adventure at Iowa State. Whether you're looking for safety training or professional development courses, you can find it here.
Removing a Participant ................................................................................................................................................... 43
Cancelling a Participant.................................................................................................................................................. 43
Waitlisted Participants .................................................................................................................................................. 44
Print Class Roster & Print Blank Roster ...................................................................................................................... 44
Email Participants ....................................................................................................................................................... 44
Cancel Event ............................................................................................................................................................... 45
Reschedule Event ....................................................................................................................................................... 46
Event Update .............................................................................................................................................................. 47
Event Audit ................................................................................................................................................................. 48
Allocate Seats ........................................................................................................................................................... 48
Class Documents ....................................................................................................................................................... 48
Event Log Viewer ....................................................................................................................................................... 49
Administration Menu ................................................................................................................................................ 49
Adding Individuals to a Flexi-Group ........................................................................................................................... 49
Deleting Individuals from a Flexi-Group .................................................................................................................... 52
Adding Courses to Flexi-Groups ............................................................................................................................... 53
Deleting Courses from a Flexi-Group .......................................................................................................................... 55
Adding Catalogs to Flexi-Groups ............................................................................................................................... 57
Deleting Catalogs from a Flexi-Group .......................................................................................................................... 58
Naming Convention Information for Catalogs and Courses ...................................................................................... 60
Section One - Learners
Topics covered in this section pertain to learners using the system, this information is designed to help you troubleshoot issues for your learners.

Landing Page
When a learner logs in to Learn@ISU, they arrive at their landing page. The landing page or dashboard contains various widgets that are viewable upon logging into the system. The dashboard includes your current enrollments, the last five (or less) completed training course titles and status, your current learning tracks assigned to you, and search course catalog.

Menu Bar
Across the top of landing page in the Menu Bar. The Menu Bar includes the following for options for learners:

- Home
- My Menu
- Course Catalog
- Schedule
- Manager Main Menu (not all users have this option, this is based on the learner’s role)

Below is a description of each option in the Menu Bar.

My Menu
My Menu is a list of links to various functions within the LMS. By clicking on links in the menu, you will be able to access:

- My Profile
- My Enrollments
- My Reports
- My Requirements
- My Safety Training Needs

My Profile
The My Profile link lists the Learner’s profile details including: First Name, Last Name, Title, Department, Telephone, Extension, Email Address, and Manager. This information is view only and cannot be changed by the learner or manager. Information on this page comes from the downloads received from Workday. The information is updated on a daily.

Below is a snapshot view of My Profile:

<table>
<thead>
<tr>
<th>Title</th>
<th>COMMUNICATIONS MANAG</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>ENVIRONMENTAL HEALTH &amp; SAFETY</td>
</tr>
<tr>
<td>Telephone</td>
<td>5152948338</td>
</tr>
<tr>
<td>Extension</td>
<td></td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:couchman@iastate.edu">couchman@iastate.edu</a></td>
</tr>
<tr>
<td>Supervisor</td>
<td>Stephen Simpson</td>
</tr>
</tbody>
</table>
My Enrollments

The My Enrollments link will list all the courses you are currently scheduled to take or have actions assigned to complete. My Enrollments will show the following:

- Course ID
- Course Title
- Delivery (classroom, Online, Webinar)
- Status date (date you enrolled in the course or the date the course was completed)
- Start time (if instructor led training, a time will be provided)
- Status (finished, enrolled, no show, cancelled, etc.)
- Approval (used for courses that require manager approval; if no manager approval is required, the default setting is Approved)
- Action (Launch – click on launch to start the course)
- Cancel (an icon will appear if you wish to cancel a course)
- You can print your enrollments by clicking on the Print icon 📜. You can also export the data to an Excel file by clicking the 📝 icon to forward or save.

Below is a snapshot view of My Enrollments:

<table>
<thead>
<tr>
<th>Course ID</th>
<th>Course Title</th>
<th>Delivery</th>
<th>Status Date</th>
<th>Start Time</th>
<th>Status</th>
<th>Approval</th>
<th>Action</th>
<th>Cancel</th>
</tr>
</thead>
</table>

My Reports

My Reports contains three reports for learners, Transcript of Completed Training, Transcript of All Training, and Expiring Training. Each report can be accessed by clicking on the eye icon in the Action column. For the Transcript of Completed Training and Transcript of All Training click on the eye icon to view the report. Each report can be sorted by clicking on Course Title, Status, Status Date, or Expiry Date. Learners can export this information to an Excel spreadsheet or print their information by clicking on the icons at the top of the report. For the Expiring Training report, this will list all courses you have completed and the number of days they have been expired. Learners can launch (start) courses from this list if they choose.

Below is a snapshot view of a My Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Category</th>
<th>Report Type</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transcript of Completed Training</td>
<td>Course</td>
<td>Internal</td>
<td>📜</td>
</tr>
<tr>
<td>Transcript of All Training</td>
<td>Course</td>
<td>Internal</td>
<td>📜</td>
</tr>
<tr>
<td>Expiring Training</td>
<td>Course</td>
<td>Internal</td>
<td>📜</td>
</tr>
</tbody>
</table>

My Requirements

<table>
<thead>
<tr>
<th>Course ID</th>
<th>Course Title</th>
<th>Status</th>
<th>Expiry Date</th>
<th>Launch</th>
<th>Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>EM-ERG-VIDEO-2014-ON</td>
<td>Emergency Response Guide Video</td>
<td>Finished - Requirement Met</td>
<td>05/07/2020</td>
<td>05/07/2023</td>
<td>Launch</td>
</tr>
<tr>
<td>EHS-PLS-FIRE-2015-ON</td>
<td>Fire Safety and Fire Extinguisher Training</td>
<td>Finished - Pass</td>
<td>04/21/2020</td>
<td>04/21/2021</td>
<td>Print Email</td>
</tr>
<tr>
<td>EHS-PLS-FIRE-2015-ON</td>
<td>Fire Safety and Fire Extinguisher Training</td>
<td>Finished - Pass</td>
<td>04/07/2020</td>
<td>04/07/2021</td>
<td>Print Email</td>
</tr>
<tr>
<td>EHS-PLS-TRAC-2016-ON</td>
<td>Traumatic Safety Guidelines</td>
<td>Finished - Pass</td>
<td>04/03/2020</td>
<td>04/03/2023</td>
<td>Print Email</td>
</tr>
</tbody>
</table>
This link lists those courses assigned to you through Learning Tracks. This is a list of training requirements based on role-specific training requirements. This list tells you courses you have taken and courses you still need to satisfy the requirements. The action column provides possible actions you can take on an assignment:

- List Events – click the link to find available dates and register for classroom training.
- Launch – click the link to launch the course.
- Sign-off - if the course is in a progress state you need to sign-off to complete the training with either an acknowledgement or electronic signature. Upon completion of the Sign-off the learner will be taken to the test if the course offers a test.
- Take Test – if you have completed the course and the User Sign-off, click the link to complete the post-course assessment.

Below is a snapshot view of My Training Requirements.

<table>
<thead>
<tr>
<th>Activity Type</th>
<th>Course ID</th>
<th>Course Title</th>
<th>Date Due</th>
<th>Required</th>
<th>Status</th>
<th>Status Date</th>
<th>Expiry Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning Track: Custom Learning Track</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Course</td>
<td>LSG-LAB-CORE-2013-ON</td>
<td>Laboratory Safety: Core Concepts</td>
<td>07/02/2014</td>
<td>Y</td>
<td>Overdue - Expired</td>
<td>05/29/2015</td>
<td>05/28/2018</td>
<td><img src="launch_icon.png" alt="Launch" /></td>
</tr>
<tr>
<td>Course</td>
<td>RAX-LAB-NDNR-2007-ON</td>
<td>Radioactive Materials Awareness Training</td>
<td>03/29/2014</td>
<td>N</td>
<td>Not Taken-Overdue</td>
<td></td>
<td></td>
<td><img src="launch_icon.png" alt="Launch" /></td>
</tr>
<tr>
<td>Learning Track: Training Needs Assessment Track</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Course</td>
<td>ECM-EHS-CPR/AED-2017-CL</td>
<td>Cardiopulmonary Resuscitation (CPR), AED &amp; First Aid</td>
<td></td>
<td></td>
<td>Not Taken</td>
<td></td>
<td></td>
<td><img src="list_events_icon.png" alt="List Events" /></td>
</tr>
<tr>
<td>Course</td>
<td>EHS-HLS-FIRE-2015-ON</td>
<td>Fire Safety and Fire Extinguisher Training</td>
<td>Finished - Expired</td>
<td></td>
<td>01/10/2017</td>
<td>01/10/2018</td>
<td><img src="launch_icon.png" alt="Launch" /></td>
<td></td>
</tr>
<tr>
<td>Manager Training Needs: Boyd Lab Safety Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager Training Needs: EH&amp;S Managers Workplace Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager Training Needs: EH&amp;S TC Staff</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager Training Needs: CC Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager Training Needs: Managing Bias</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager Training Needs: Sippel Research Group</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manager Training Needs: ME-270 Section C</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

My Safety Training Needs
This link allows learners to complete an assessment to guide them in completing safety training courses offered by the Department of Environmental Health and Safety.

Follow the below to create a My Safety Training Needs Assessment
1. The learner clicks on the New button and answers a series of questions.
2. After completing the questionnaire, a Custom Learning Track is created for the learner with required or recommended courses based on the learner's responses to the questionnaire.
   a. The Custom Learning Track is found on the landing page when the learner logs into Learn@ISU. Learners can complete the questionnaire multiple times, they can rename an assessment, print a copy of the completed assessment, or delete older assessments. It is recommended the learner complete the assessment with their supervisor for best results.

Course Catalog
The Course Catalog contains all courses available to the learner. The Course Catalog contains courses the learner can register for or complete online.

There are the various ways of searching through the Course Catalog:
The main Course Category page consists of folders. To browse in a catalog, click the folder to expand or collapse the folder to either show or hide all courses at that level in the catalog. Once a course is located, click the title for a description. To enroll – click List Events for classroom enrollment options or Launch to start an online course.
If a course is in a catalog and there is not a List Events link, it means there are currently no scheduled classroom sessions being offered. Learners are encouraged to check back periodically to see if classroom sessions have been added to the schedule.

Some courses have prerequisites that must be completed before taking the course. If you select a course that has a prerequisite and you have not completed the prerequisite course, you are not able to complete the course you selected. Once you have completed the prerequisite course, you may then complete the original course you selected.

Catalogs are automatically assigned based on rules defined by corporate training. Rules can be defined by location, job role, and/or department. These catalogs will only be viewed by those who qualify—or have been given access to view the catalog.

Some courses may be available in several catalogs. If completed in one catalog, the course will be complete in all catalogs that the course is associated with.

Some course catalogs contain courses for purchase. These courses have a fee attached to them and the fee must be paid for at time of registration. After the learner clicks on List Events, the following screen shows the events with a Purchase link. Upon clicking on the Purchase link, the learner registers for the course and completes the purchase with a credit card. Once the purchase is complete, the learner is brought back to Learn@ISU.

### Schedule

All courses in the calendar are hyperlinked to the course description where learners have the option to register. If the course does not contain a hyperlink, enrollment is not permitted. The calendar has a list view and a month (calendar) view which can be toggled by clicking the respective icons at the top of the page, you can view the calendar month by month, day to day, or list all the scheduled courses.

You can search for a course or building in the calendar. All courses associated with your search criteria will appear.

Multiple day courses will show on the calendar for all training days. However, only Day One will be available for enrolling unless there is an option to enroll days of the course.

<table>
<thead>
<tr>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
</tr>
</thead>
<tbody>
<tr>
<td>04/27</td>
<td>04/28</td>
<td>04/29</td>
<td>04/30</td>
<td>05/01</td>
</tr>
<tr>
<td>6:00PM</td>
<td>6:00PM</td>
<td>6:00PM</td>
<td>6:00PM</td>
<td>6:00PM</td>
</tr>
<tr>
<td>6:00PM</td>
<td>6:00PM</td>
<td>6:00PM</td>
<td>6:00PM</td>
<td>6:00PM</td>
</tr>
</tbody>
</table>

And a snapshot view of the event listing mode
Course Equivalents

There may be instances when a training requirement is met by a course that is considered equivalent to the required course. Equivalent courses are indicated within the course description. You will see the course equivalents in the course information.

To the right is a snapshot view of a course with a Course Equivalent. You will see here if there are any courses that are equivalent to the course you have selected.

Section Two – Administrators/Managers

Topics covered in this section pertain to administrators and managers using the system, this information is designed to help managers navigate reporting functions in the system and administrators to manage their course catalogs and flexi-groups in Learn@ISU.

Manager Functions

Manager Main Menu

The Manager Main Menu is a list of links to various functions within the LMS that are in addition to the My Menu. By clicking on links in the menu, you will be able to access People, Reports, Manager To-Dos, Master Schedule. All menu links vary in access depending on your specific security profile. Below is a description of what each link contains for a manager.

- People – this is a list of a manager’s direct reports. This list is automatically updated by the system daily. The information is updated from the download from Workday. Managers may see people who have been assigned to them via a flexi-group. Managers do not have the ability to change their direct reports, however if they have a flexi-group assigned to them, they may have permission to update the flexi-group or contact the individual within their department/unit to update their group.

- Reports – managers have several options for reports and can only pull reports for those are directly report to them or have been assigned to them via a flexi-group. There will be more about using reports later in the manual.

- Manager To-Do List – Iowa State does not use this feature.

- Master Schedule – this allows managers to see the master schedule for all classroom courses and gives them the ability to register direct reports and those assigned to them via the flexi-group process into a classroom course.
People
The People link enables you to find people, look at their properties, history and learning tracks. When you click on the People link, you see a list of your direct reports and those assigned to you from a flexi-group (if applicable). Click on the name of the employee or the green icon in the Action column to view their record.

Properties Tab

The Properties tab allows the manager to view the various learner attributes, this is a read only page. If these attributes are incorrect, please contact the Learn@ISU System Administrator to review. Below is a list of the attributes shown in the Learner’s properties:

Below is a snapshot view of what the Properties Tab looks like:

<table>
<thead>
<tr>
<th>Learner ID</th>
<th>Learner Name</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000000001</td>
<td>Test, Alpha</td>
<td><a href="mailto:onboard_tester01@iastate.edu">onboard_tester01@iastate.edu</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>FPM Grouping</td>
<td>Select One</td>
</tr>
<tr>
<td>DOR Grouping</td>
<td>Select One</td>
</tr>
<tr>
<td>ISU Grouping</td>
<td>Select One</td>
</tr>
<tr>
<td>*Record Status</td>
<td>Active</td>
</tr>
<tr>
<td>Learner Status</td>
<td>Active</td>
</tr>
<tr>
<td>Title ID</td>
<td>None Chosen</td>
</tr>
<tr>
<td>Department</td>
<td>Select a Department</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Booler, Mindi</td>
</tr>
<tr>
<td>HR Manager</td>
<td>None selected</td>
</tr>
<tr>
<td>*Email Address</td>
<td><a href="mailto:onboard_tester01@iastate.edu">onboard_tester01@iastate.edu</a></td>
</tr>
<tr>
<td>Street Address 1</td>
<td></td>
</tr>
<tr>
<td>Street Address 2</td>
<td></td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>Country</td>
<td></td>
</tr>
<tr>
<td>State</td>
<td>None Selected</td>
</tr>
<tr>
<td>City</td>
<td></td>
</tr>
<tr>
<td>*UserName</td>
<td>onboard_tester01</td>
</tr>
<tr>
<td>Is Staff</td>
<td>No</td>
</tr>
<tr>
<td>Is Student</td>
<td>No</td>
</tr>
<tr>
<td>Is External</td>
<td>No</td>
</tr>
</tbody>
</table>

History Tab

The History Tab shows all the History for that Learner. Each course will show course ID, Course Title, Status (Finished, Enrolled, Cancelled, or blank status), Status Date, and Action. This is view only information.

Below is a snapshot view of what a Learner’s History may look like:

<table>
<thead>
<tr>
<th>Course ID</th>
<th>Course Title</th>
<th>Status Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>UHR-SIP-BNFTTS-2015-CL</td>
<td>ISU &amp; State of Iowa Benefits Session for Non-Supervisory/Organized Mgmt Staff</td>
<td>07/14/2015</td>
<td></td>
</tr>
</tbody>
</table>

Total Records: 1

Learning Tracks
Learning Tracks tab shows Learning Tracks assigned to the Learner. Below is a snapshot view of the Learner’s Learning Track will look like in the Manager View:

<table>
<thead>
<tr>
<th>Credit</th>
<th>Group Activity Type Name</th>
<th>Course Title</th>
<th>Required</th>
<th>Status</th>
<th>Status Date</th>
<th>Expiry Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Learning Track: Custom Learning Track</td>
<td>EH&amp;G Driving Policy - Full Time Staff</td>
<td>Yes</td>
<td>Finished - Requirement Met</td>
<td>07/03/2019</td>
<td>02/02/2022</td>
<td></td>
</tr>
<tr>
<td>0.00</td>
<td>Course</td>
<td>EH&amp;S Duty Officer Training - Initial</td>
<td>Yes</td>
<td>Finished - Requirement Met</td>
<td>05/15/2014</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.00</td>
<td>Course</td>
<td>EH&amp;S Duty Officer Training - Refresher</td>
<td>Yes</td>
<td>Finished - Pass</td>
<td>01/23/2020</td>
<td>01/22/2021</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Course</td>
<td>Regulated Materials Facility Initial and Refresher Training</td>
<td>Yes</td>
<td>Finished - Pass</td>
<td>11/13/2019</td>
<td>11/12/2020</td>
<td></td>
</tr>
<tr>
<td>0.00</td>
<td>Course</td>
<td>Office Ergonomics</td>
<td>Yes</td>
<td>Finished - Expired</td>
<td>11/13/2019</td>
<td>11/12/2020</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Course</td>
<td>Fire Safety and Fire Extinguisher Training</td>
<td>Yes</td>
<td>Finished - Expired</td>
<td>01/10/2017</td>
<td>01/10/2018</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Course</td>
<td>Emergency Response Guide Video</td>
<td>Yes</td>
<td>Finished - Requirement Met</td>
<td>05/07/2020</td>
<td>05/07/2022</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Learning Track: ED Training</td>
<td>Title IX Training - Non Supervisor</td>
<td>Yes</td>
<td>Finished - Expired</td>
<td>02/20/2018</td>
<td>02/20/2019</td>
<td></td>
</tr>
<tr>
<td>0.00</td>
<td>Course</td>
<td>Title IX Training - Supervisor</td>
<td>Yes</td>
<td>Finished - Expired</td>
<td>03/06/2018</td>
<td>03/05/2019</td>
<td></td>
</tr>
</tbody>
</table>

Reports

There are several standard reports within Learn@ISU. These reports can be filtered to provide you with the information you need, if filtering is not enabled, all records will be shown for people in your security profile flexi-group. If filtering, but no filters have been added yet, you will be asked whether you want to add a filter or show all records. It will look like this:

The following basic reports are available in Learn@ISU. Please note, report access is controlled by your security profile with the system.

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training Tracking by Course</td>
<td>Tracks training by a course ID.</td>
</tr>
<tr>
<td>Expiring Training by Course</td>
<td>Provides manager a list of training courses that are expiring for direct reports.</td>
</tr>
<tr>
<td>Training Hours by Course</td>
<td>We do not use.</td>
</tr>
<tr>
<td>Training Hours by Person</td>
<td>We do not use.</td>
</tr>
<tr>
<td>Expiring Training by Person</td>
<td>Provides manager a breakdown by person of their expiring training.</td>
</tr>
<tr>
<td>Training Tracking by Person</td>
<td>Tracks training by a manager’s direct reports or flexi-group.</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------</td>
</tr>
<tr>
<td>Learning Track Progress by Person</td>
<td>Tracks a Learning Track by the learning track requirements, then by person.</td>
</tr>
<tr>
<td>Learning Track Progress by Person then by Track</td>
<td>Tracks a Learning Track by person, then by learning track.</td>
</tr>
<tr>
<td>Required Training Not Taken by Track</td>
<td>Shows required training in a learning track not taken by person.</td>
</tr>
<tr>
<td>Assessment Detail Report</td>
<td>We do not use.</td>
</tr>
<tr>
<td>Scheduled Training by Trainer</td>
<td>Using the course ID, you can search and view the date of the course, number of participants who finished, number of participants who no-showed, and number who cancelled.</td>
</tr>
</tbody>
</table>

Creating a New Report
1. Choose the report from the list of available reports.
2. Click Add New Filter at the bottom on page.
3. In the column drop-down menu, choose the filter you wish to use and complete the information for the field. Example, if you choose Course ID as your filter item, complete the operator and Value(s) field. Please ensure your information is correct when entering information in the values field.
4. Add additional filters as needed. **NOTE – if you add a filter and decide you do not want to use it, check the box in the Delete column.**
5. Choose the Output Style – Report or Grid. If you are exporting into an Excel document, choose Grid.
6. Once complete, enter a name for the report and click Save.
7. The report is now visible.
Report tips:

- You can only see your direct reports and flexi-group (if applicable) in your report.
- Status Date is your friend – this is easiest filter to update. Once you build your report and it works, just go in each month and edit the date to the period you wish to have a report for and re-save the report.
- Keep your report filters simple – Course ID, Completion Status, and Status Date are three of the best filters to use.
- Be accurate – if entering a course ID, make sure it is accurate, if it is not accurate you will not get any results.
- Not all filters are available for all reports, make sure the report you want to run has the filters you need.
- When choosing the Operator – choose equal, contains or between, these work the best of all the choices.
- If you want to choose more than one selection for the Values column, check the Multiple box and then choose your options. Example, if you want to include Active and Inactive learners in a report or In Progress and Finished for Completion Status.

Edit a Report

1. Choose the report for the list of available reports.
2. Find the name of the report you wish to edit and click the Edit circle.
3. Edit the filter(s) you wish to edit or delete and make any additional changes to the report, such as Output Style. Note, if you change the name of the report, the system will generate a new report.
4. Once the edits are complete, click Save.

Delete a Report

1. Choose the report from the list of available reports.
2. Find the name of the report you wish to delete and click on the Delete circle. The report is now deleted.
This section covers adding classroom and online training courses to Learn@ISU.

**Course Types**

Scheduled Training (classroom training)

This is instructor led training performed in a classroom, webinar, on-the-job, external and in general is type of training that has a date, time, location and one or more trainers and you need to track history for the course ID. These default values are applied when you schedule the training in Master Schedule, so you only must enter the minimum data. Some defaults include Class Size, Waitlist Size, Days from Scheduled Date that Enrollment Begins, Default Trainers, default number of sessions when the training is scheduled.

Generic Online

This course type is ideal to use for tracking PDF documents, videos and other web resources that are not e-learning courses that can automatically communicate to LMS. Many organizations will use this to track SOPs and other company policies that a user must acknowledge or sign-off they have reviewed. By default, adding a generic Online course builds a “workflow” for users to acknowledge they are done with the materials since the content is not able to post a tracking status. If enabled by the administrator, the acknowledgement may be an electronic signature.

AICC HACP

This course type is e-learning training produced by AIC HACP conformant authoring tools or vendors who understand how to produce content that conforms to this standard. This type of e-learning will automatically post back to LMS tracking data such as scores, completion status, location and more.

SCORM 1.2

This course type is e-learning that conforms to the SCORM model. SCORM is a set of standards and works like AICC, tracks to the same level as AICC but implements how tracking is done differently.
Creating Scheduled Training (new classroom course)

1. Click on Manager Main Menu, then choose Courses
2. In the upper left-hand side of the screen, click the green + sign
3. In the pop-up window, choose Scheduled Training and click Next.
4. Complete the following fields for your course:
   a. Course ID (this follows your department nomenclature, a list of these is located at the end of this document).
   b. Course Title
   c. Delivery (either Instructor Led or Conf. Call/Video Conf.)
   d. Course description
   e. Days Valid – if the course is valid for a certain period, enter the number of days. 1 year = 365 days, 2 years = 730 days, 3 years = 1095 days
   f. User can cancel if Enrolled/Waitlisted? – change to Yes. This allows the learner to cancel on their own. If you leave it as No, you are the only person who can cancel their registration – this is not recommended.
   g. Use can print certificate – make decision based on if your area offers certificates for their training courses.
   h. Certificate background – if you have a specific background, choose the one your department/unit uses, otherwise leave as none selected to get the default background.
   i. Training Area – change to your Training Area
   j. Department – change to your Department
   k. Manager 1 ID and Manager 2 ID – if you choose Manager 1 ID, the name will appear on the lower left-hand side of the certificate, Manager 2 ID appears on the lower right-hand side of the certificate. If you choose both, one is lower left, the other is lower right.
   l. Duration – add for each class .25 = 15 minutes, .50 = 30 minutes, .75 = 45 minutes, and 1.0 = 1 hour.
   m. Minimum Class Size – complete only if you have a minimum number for the class to run.
   n. Maximum Class Size – complete based on the number of seats in your classroom. If virtual, this number can be larger based on your web meeting platform requirements/restrictions.
   o. Enrollment Open Days – complete based on when you want to allow participants to start enrolling.
   p. Enrollment Close Days – complete based on when you want enrollment to close. It is recommended this be at least one day to allow facilitators time to complete course prep work.

5. If you have another course, click Save and Add Another, if not click Save and Close Window.
Creating a new online course
There are three options for creating a new online course in Learn@ISU. The options are AICC, SCORM 1.2, or Generic Online. The owner of the course makes this decision when they are publishing the course in the course-publishing software.

AICC
1. Click on Manager Main Menu, then choose Courses
2. In the upper left-hand side of the screen, click the green + sign
3. In the pop-up window, choose AICC (HACP) Protocol and click Next.
4. On the next screen, do the following:
   a. Change User Domain to LearnerWeb Base Domain
   b. Choose your Training Area from the drop-down list
   c. Import the following files from your secure location on the server
      i. CRS file
      ii. CST file
      iii. DES file
      iv. AU file
   d. Enter the Course ID (this follows your department nomenclature, a list of these is located at the end of this document).
5. Click Next to complete the process. At this time a window will appear, you can add another course or finish. Please note, if you click on the option to view the course you will get an error message because you have not loaded the index file.
6. In the courses list, find your course to complete the process as listed below.
   a. Review course title – update as needed.
   b. Department – add
   c. Add a Course Description
   d. Enrollment Rule – leave as User Can Enroll – Open Enrollment
   e. Add Days Valid if applicable. 1 year = 365 days, 2 years = 730 days, 3 years = 1095 days
   f. User can cancel if Enrolled/Waitlisted? – change to Yes. This allows the learner to cancel on their own. If you leave it as No, you are the only person who can cancel their registration – this is not recommended.
   g. Use can print certificate – make decision based on if your area offers certificates for their training courses.
   h. Certificate background – if you have a specific background, choose the one your department/unit uses, otherwise leave as none selected to get the default background.
   i. Manager 1 ID and Manager 2 ID – if you choose Manger 1 ID, the name will appear on the lower left-hand side of the certificate, Manager 2 ID appears on the lower right-hand side of the certificate. If you choose both, one is lower left, the other is lower right.
   j. Duration – add for each class .25 = 15 minutes, .50 = 30 minutes, .75 = 45 minutes, and 1.0 = 1 hour.
7. Click Save to save the information on this screen. If you missed a required item, you will not be able to save the page.
8. Click on the Course Modules tab at the top of the page.
9. Under the Action column, click on the pencil/folder icon to edit the launch path for the course.
10. A pop-up window opens, from your secure folder on the server, locate the index file and click on it to launch. It should launch in your default browser.
11. In the launch path field, enter the following:
   a. https://training.ehs.iastate.edu (this is standard for every course)
   b. File location ehstraining – this varies by group – this is just an example.
c. Output from web browser (index file) - EHS-BIO-BRAFR-2016-ON/index_lms_html5.html

d. Looks like this - https://training.ehs.iastate.edu/ehstraining/EHS-BIO-BRAFR-2016-ON/index_lms_html5.html

NOTE - this is for informational purposes only. Each department/unit will have a unique file location for their courses on a secure drive on the server.

12. Click Save to complete the process.

SCORM 1.2

1. Click on Manager Main Menu, then choose Courses
2. In the upper left-hand side of the screen, click the green + sign
3. In the pop-up window, choose SCORM 1.2 and click Next.
4. On the next screen, do the following:
   a. Change User Domain to LearnerWeb Base Domain
   b. Choose your Training Area from the drop-down list
   c. Import the Zip file from your secure location on the server
   d. Enter the Course ID (this follows your department nomenclature, a list of these is located at the end of this document).
5. Click Next to complete the process. At this time a window will appear, you can add another course or finish. Please note, if you click on the option to view the course you will get an error message because you have not loaded the index file.
6. In the courses list, find your course to complete the process as listed below.
   a. Review course title – update as needed.
   b. Department – add
   c. Add a Course Description
   d. Enrollment Rule – leave as User Can Enroll – Open Enrollment
   e. Add Days Valid if applicable. 1 year = 365 days, 2 years = 730 days, 3 years = 1095 days
   f. User can cancel if Enrolled/Waitlisted? – change to Yes. This allows the learner to cancel on their own. If you leave it as No, you are the only person who can cancel their registration – this is not recommended.
   g. Use can print certificate – make decision based on if your area offers certificates for their training courses.
   h. Certificate background – if you have a specific background, choose the one your department/unit uses, otherwise leave as none selected to get the default background.
   i. Manager 1 ID and Manager 2 ID – if you choose Manager 1 ID, the name will appear on the lower left-hand side of the certificate, Manager 2 ID appears on the lower right-hand side of the certificate. If you choose both, one is lower left, the other is lower right.
   j. Duration – add for each class .25 = 15 minutes, .50 = 30 minutes, .75 = 45 minutes, and 1.0 = 1 hour.
   k. Launch In Pop-Up – choose Yes for any SCORM course. This will ensure the quiz/test score will report back to Learn@ISU and update the course status to Finished/PASS or Finished/COMPLETE.
7. Click Save to save the information on this screen. If you missed a required item, you will not be able to save the page.
8. Click on the Course Modules tab at the top of the page.
9. Under the Action column, click on the pencil/folder icon to edit the launch path for the course.
10. A pop-up window opens, from your secure folder on the server, locate the dispatch file and click on it to launch. It should launch in your default browser.
11. In the launch path field, enter the following:
   a. https://training.ehs.iastate.edu (this is standard for every course)
   b. File location ehstraining – this varies by group – **this is just an example**.
   c. Output from web browser (dispatch file) - EHS-BLR-ABI-2019-ON/dispatch.html
   d. Looks like this - https://training.ehs.iastate.edu/EHSTraining/EHS-BLR-ABI-2019-ON/dispatch.html **NOTE - this is for informational purposes only. Each department/unit will have a unique file location for their courses on a secure drive on the server.**

12. Click Save to complete the process.

**Generic Online**

1. Click on Manager Main Menu, then choose Courses
2. In the upper left-hand side of the screen, click the green + sign
3. In the pop-up window, choose Generic Online and click Next.
4. Complete the following fields for your course:
   a. Course ID (this follows your department nomenclature, a list of these is located at the end of this document).
   b. Course Title
   c. Training Area
   d. Department
   e. Course description
   f. Enrollment Rule – leave as User Can Enroll – Open Enrollment
   g. Add Days Valid if applicable. 1 year = 365 days, 2 years = 730 days, 3 years = 1095 days
   h. User can cancel if Enrolled/Waitlisted? – change to Yes. This allows the learner to cancel on their own. If you leave it as No, you are the only person who can cancel their registration – this is not recommended.
   i. Use can print certificate – make decision based on if your area offers certificates for their training courses.
   j. Certificate background – if you have a specific background, choose the one your department/unit uses, otherwise leave as none selected to get the default background.
   k. Manager 1 ID and Manager 2 ID – if you choose Manager 1 ID, the name will appear on the lower left-hand side of the certificate, Manager 2 ID appears on the lower right-hand side of the certificate. If you choose both, one is lower left, the other is lower right.
   l. Duration – add for each class .25 = 15 minutes, .50 = 30 minutes, .75 = 45 minutes, and 1.0 = 1 hour.

5. Enter your target URL – it will be like this:
   a. https://training.ehs.iastate.edu (this is standard for every course)
   b. File location ehstraining – this varies by group – **this is just an example**.
   c. From your secure folder on the server, locate the file ending in .html and click on it to launch. It should launch in your default browser; this gives you file output copy the following from the browser window: ACD-COE-FOSS-2014-ON/story.html. It is important you choose the HTML file and not the SWF file. SWF is an Adobe Flash file and Flash is no longer being supported by web browsers so the file will not load.
   d. Looks like this - https://training.ehs.iastate.edu/ehstraining/ACD-COE-FOSS-2014-ON/story.html **NOTE - this is for informational purposes only. Each department/unit will have a unique file location for their courses on a secure drive on the server.**
6. Click Save to save the information on this screen. If you missed a required item, you will not be able to save the page.

Making Changes to Online Courses
If you need to make changes to an online course, please note the following fields cannot be changed once the course is loaded:

- Course ID
- Course Type
- Delivery

Common changes include:

- Updating the course description
- Changing days valid
- Changing the name(s) on the course certificate
- Adding a Date Effective From and a Date Effective To – this allows you to control when a course is available for learners to complete. Example, you have an annual training a learner must be complete between January 1 and February 28 – just enter the dates in the fields and click Save. By adding dates, the course is open for the date you specify.

Using the e-Signature Required
This feature allows you to require an electronic signature from a trainer/facilitator for a class. This feature is used for hands-on classes that require the learner to demonstrate a skill – for example using a specific tool in a shop setting.

Follow these steps to add an e-Signature to the course.

1. Choose LDAP (+Trainer)
2. Click Save
3. The next step is to add Trainers to your course. These are the people who can sign-off on the training after observing the learner complete the assigned task.

NOTE – Contact Learn@ISU to add trainers to the table prior to starting this process.

1. Login to Learn@ISU.
2. Click on Manager Main Menu and choose Courses
3. In the list of courses, choose the course to add the trainer to by clicking on the course title link or green information icon in the Action column.

4. On the Course Properties page, click on the Trainers tab at the top to access the trainers for the course.

5. Click on the green + sign on the left-hand side to add a new trainer.
6. Scroll through the names on the left-hand side and find the trainer to add to the course (trainers are listed in alphabetical order by first name). Click on the Trainers name and then on the Add button. You can add multiple people if you wish. After adding everyone, their name will appear at the bottom of the list, when you are done, click Next.

7. Your list is updated with the addition.

8. Click on Courses at the top of the page to go back to your course list. You will need to follow the steps above for each course when adding a new trainer(s).

Deleting a trainer in Learn@ISU

Follow the steps below to delete a trainer from a course in Learn@ISU.

1. Login to Learn@ISU.
2. Click on Manager Main Menu and choose Courses
3. In the list of courses, choose the course to add the trainer to by clicking on the course title link or green information icon in the Action column.
4. On the Course Properties page, click on the Trainers tab at the top to access the trainers for the course.
5. Find the name in the Trainers list and click on the red x in the Action column.
6. A window opens – review the name, if correct click Delete, if incorrect click Cancel.

7. You will need to repeat the process to delete additional trainers. There is not a blanket process to delete multiple trainers at one time.

Deleting a course in Learn@ISU
Courses are not deleted in Learn@ISU once there is a course history. This is done to ensure accurate training records are kept for all users in the system. The only exception for this is if you are creating a new course and make a mistake entering a course ID, the course can be deleted before any training history is recorded. Contact Learn@ISU to have the course removed from the system. Only system administrators have permission to delete courses.

Other tabs in Courses

Course Workflows
On this tab, you can add the following for a course:

- Manager Training Sign-Off (ISU does not use)
- Mastery Assessment – add an exam after completing the course, used with Generic Online courses.
- User Survey – adds a survey for the participant to complete after completing the course.
- User Training Sign-Off – add a sign-off the learner must complete stating they have viewed the course and are comfortable with the material in the course.
- User Upload Document (ISU does not use)
- Test-Out Assessment – adds a “test-out” option for learners to take an assessment to test-out of the course.
- Post-Course Assessment – adds an exam after completing the course, used with Generic Online courses.
- Course Prerequisite – adds a course or courses that must be completed before the learner can take a specific course.
Adding an Assessment (mastery, test-out, or post-course)

Follow the steps below to add an assessment to a course.

1. Create the course in Learn@ISU. Choose either Generic Online or Scheduled Training as the type of course. If adding to an existing course open the course and find the Question Bank and Assessments tabs.

2. Create a bank of questions using the Question Bank tab. There are four question types from which to choose.
3. Multiple Answers allows the learner to pick all that apply.
4. Multiple Choice allows the learner to pick the most correct answer.
5. Yes/No is like True/False with the learner choosing whether the question is correct or incorrect.
6. Text requires the learner to enter an exact answer to the question into a text field.
7. Click on Question Bank to begin creating questions, add additional questions or to edit existing questions.

8. Click on the add icon to add a question and complete the fields of the form.

9. Question Text field - Enter the body of the question.
10. Question Type – Choose Multiple Answers, Multiple Choice, Yes/No or Text.
11. Correct and Incorrect Feedback fields - Type in feedback for each field.
12. Choose whether the question is Mandatory. Questions marked Mandatory will appear each time the assessment is completed when a bank of questions is used to produce assessments that do not contain the same questions each time.
13. Choose where or not to shuffle answers for the question. If doing an “All of or None of the Above, be sure to check this box.
14. Choose all the types of tests for which the question should be available (Mastery, TestOut, PreCourse and PostCourse).
15. Choose Save and Close Window or Save and Add Another to continue creating questions or begin entering answers for your questions.
Adding answers for assessment questions

Follow the steps below to add answers to your assessment questions.

1. In Question Bank, click the icon under the Action column to view information about each question.
2. Two tabs (Properties and Answers) should be visible. (If you do not see two tabs at the top of the pop-up window use your mouse to increase the width of the window until you see the two tabs appear.) The Properties tab is used to modify the question information. The Answers tab is used to add or modify answers for the question.
3. Click on the Answers tab.
4. Click the icon under the Action column to modify an existing answer.
5. Click on the add icon to add additional answers.
6. Provide the answer in the Answer Text field. Indicate whether the entry is a correct answer. If you wish to have answers in a specific order, use the display sequence and order them starting with 1, and so-on. Click on either the Save and Close Window or Save and Add Another option to continue.

NOTE – If choosing Text as the question type enter only the correct answer.
The answer given by the learner must match what is typed in the correct answer field. For example, if the question is 2+2=, the correct answer is 4 and the add answer fields would be completed the same as this example:

The Answers tab will display only one answer for the question as in this example:

---

Build a Course Assessment

Follow the steps below to add a course assessment.

1. Click on the Assessments tab.

2. Click on the under the Action column to modify an existing assessment.

3. Click on the add icon to add a new assessment.

4. Assessment Name field – Type in the name of the assessment.

5. Assessment Type – Choose the type of assessment. Use Post-Course Assessment for testing after an online course or instructor lead class.
6. Indicate the number of questions to be included in the assessment.
7. Choose whether to randomize questions.
8. Minimum Score – Enter the minimum passing score to pass as percent correct. For example, if 80% is required to pass then enter 80 into the field.
9. Choose options for Feedback Options and Display Score.
10. Time Limit does not work, **DO NOT USE**.
11. Choose Save and Add Another or Save and Close Window to continue.

**Implement the Course Workflow**
The course workflow tab is used to define the steps and passing criteria of each step for a course that implements a course workflow. Generic Online and Scheduled Training utilize course workflows. The steps of the course workflows differ between the two course types. Both workflows will be covered in this section.

**Scheduled Course**
Follow the steps below to administer an assessment as part a Scheduled Course.

1. Click on the Course Workflows tab.
2. Click on the under the Action column to modify an existing workflow.
3. Click on the add icon to add a new workflow item.
4. Choose a Course Activity Type ID. Post-Course Assessment is used for routing a test after a class. Click Next to continue.
5. Complete the fields on the next screen so that they reflect the values in this example. The Survey/Assessment field should indicate the name of the assessment you created using the Assessments tab.
6. Click on Save to save changes.  
   **NOTE** - This setting allows the learner an unlimited number of tries to complete the assessment. If you wish to limit the number of times a user has to pass the assessment change the -1 value in the Number of Attempts field to another value of your choice.

7. Schedule the class on Master Schedule following instructions in the User Guide. Once you complete the Event Update for the class, the participants will have access to the Take Test link for the class under My Enrollments.

8. Use these values when completing the Event Update:
   a. Set the Status default value to Finished.
   b. Set the Pass/Fail default value to In Progress
   c. Make changes to individual learners such as recording a No Show or Cancellation.

9. Click Next to complete the Event update.

---

**Generic Online Course**

A Generic Online course is a type of course that utilizes the Course Workflows to record completion of the course. The User Sign-off is automatically created with publishing a generic online course. Adding an assessment requires modifying the existing user sign-off step and adding the post-course assessment step.

Follow the instructions below to add an assessment as part of a Generic Online course.

1. Click on the Course Workflows tab.
2. Click on the under the Action column to modify the course workflow. Complete the fields on the next screen so that they reflect values in this example. Save the changes.

3. Click on the add icon to add a new workflow item.

4. Choose a Course Activity Type ID. Post-Course Assessment is used for routing a test after a course. Click Next to continue.

5. Complete the fields on the next screen so that they reflect the values in this example. The Survey/Assessment field should indicate the name of the assessment you created using the Assessments tab. Click on Save to save changes.

NOTE – These setting allow the learner an unlimited number of tries to complete the assessment. If you wish to limit the number of times a user has to pass the assessment change the -1 value in the Number of Attempts field to another value of your choice.
Course Prerequisites

Follow the steps below to add to a prerequisite to a course in Learn@ISU.

1. Access the course which has a prerequisite course from the Manager Main Menu.
   a. Manager Main Menu > Courses
2. Choose the course you wish to add a Course Prerequisite too from the menu.
3. Access the course and click on the Course Workflows tab at the top.
4. On the Course Workflows tab, click on the green + sign to add a new item
5. In the pop-up window, choose Course Prerequisite and click Next.
6. In the Course Activity ID menu, choose the course that is the prerequisite course that people need to take before taking the course. After selecting the course, change the Status on Pass to Finished, and leave Step Constraint as "All".
7. If you have another course to add as a prerequisite, click “Save and Add Another“, if no other courses to add, click “Save and Close Window”.
8. The Prerequisite will now show in your course workflow.
9. If you have other workflow steps to add, you can add them at this time. Please note, the prerequisites do not have a workflow step. When finished, exit out of the Courses menu.

10. Access the course in the Course Catalog and view the course description by clicking on the course title. You will see this screen, notice the red text. Please note, if the text is blue, the learner has completed the prerequisite.

11. Click on Launch (text must be red in the course description to test this) and you see this screen. Once the learner completes the prerequisite course, they can then take the course by clicking the Launch link.

12. If you need to change a course prerequisite, access the Course Workflow tab, delete the current prerequisite and then add a new prerequisite.

**History Tab**

The course history tab allows you to see the following information for each course:

- Learner ID
- Learner Name
- Completion Status
- Expiry Date
- Status Date (this is the day they completed the course)
- Score – if you have an AICC or SCORM 1.2 course, this is the assessment score
- Post-Test Score – if you have a Generic-Online course, this is the assessment score
- Action – you can click on the icon to see additional information, including using the Assessment tab to review their assessment answers.
- Certificate – you can print certificates for learners or email them a copy of their certificate upon request.

**NOTE** – you are unable to modify any information on this screen.

**Competencies**

Competencies are used by EH&S for their Training Needs Assessment and the Manager Training Needs tool.
Licenses and Version Control
We do not use either of these tabs in Learn@ISU.

Equivalents
You have several courses that are different but can both satisfy a certain requirement. You would use course equivalents to accomplish this.

Follow the steps below to add a course equivalent.

1. Click on the icon, you will be asked to select a course.
2. Enter the Course ID of the equivalent course and click Next.
3. Choose the correct course from the list and click on Next.
4. Click Next on the following screen.
5. The course has been added.
6. When a learner views the Course Catalog description, they see this:
Question Bank, Assessments, and Trainers
These have been covered previously with instructions for each topic.

Audit
This is a view only page that shows history of the course in Learn@ISU.

Documents
We do not use either of this tab in Learn@ISU.

Where Used
This is a view only tab. You can see what catalogs, learning tracks, and Manager Training Needs tools contain your course.

Waive a person from a course
This process is done to waive a person from a course who does not need to complete it as part of their training.

Follow the steps below to waive training requirements for a learner.

1. Click on Manager Main Menu
2. Choose Courses
3. Search for the course name in the list, click on the link when you have located the correct course.
4. Click on the History Tab on the courses page
5. Click the green + sign near the search box.
6. In the pop-up window, choose Select Learners then click Next.
7. Enter the learner's 9-digit UID in the Learner ID field and click Next.
8. The learner's name will appear, click Next.
9. The learner will appear with a Status Date and a Status. Adjust the date if needed to the day the requirement was waived and change the Status to “Waived”. Click Next to continue.
10. Close the Window and you are done.
11. The learner will show up in course history like this.

Catalog Manager

Follow the steps **below** 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 (Course Catalog or Learning Track) and click Next. The type of catalog you choose indicates how the catalog is treated by the system.
   a. If creating Course Catalog, complete the following screen fields:
      i. Catalog ID (a list of the department IDs is listed at the end of this document for reference)
      ii. Catalog Name
      iii. Status (Active or Inactive) Note – you may choose to keep a catalog inactive while adding courses to it)
      iv. Training Area Key (if you do not have a training area, leave as is.)
   b. If creating a Learning Track, complete the following screen fields:
      i. Catalog ID (a list of the department IDs is listed at the end of this document for reference)
      ii. Catalog Name
      iii. Status (Active or Inactive) Note – you may choose to keep a learning track inactive while adding courses to it)
      iv. Training Area Key (if you do not have a training area, leave as is.)
      v. Permanent Assignment – if always required, choose Yes, if a one-time only assignment, choose No.
      vi. Effective From / Effective To – if you wish to make the learning track available for a certain period, complete these fields.
      vii. Apply Effective Dates – use only with Effective From / Effective To.

4. Click Save and Add Another if you have additional Learning Tracks to add or Save and Close Window if you are finished.
Adding Courses to Catalogs and Learning Tracks

Follow the steps below to add a course to a catalog or learning track.

1. Click on the name of the catalog or on the icon in the Action Column to view the catalog. You will see the following tabs:
   a. Properties - displays the catalog demographic information. The only information that should be changed on this tab are:
      i. Permanent Assigned
      ii. Effective From / Effective To
      iii. Apply Effective Dates
   b. Courses - used to add or remove a course from the catalog.
   c. People - used to allow learners to view the catalog by adding one at a time
   d. Assignment Criteria - used to allow groups of learners to view the catalog by adding a group at a time
   e. Group Documents, Version Control, Group Approvers, Qualifying Catalog, Group Completion Criteria, Group Documents, and Catalog Audit. Learn@ISU does not use these tabs.

2. To add a course from the catalog, click on the add icon to add a course to the catalog or learning track. Choose Course and click Next.

3. Use either the course ID or search by the Course Name to find the course to add to the catalog. Click Next to execute.

4. Choose the correct course from the list and click Next
a. If adding to a course catalog – click Next again.

b. If adding to a Learning Track, complete the following information:
   i. Required – Yes or No
   ii. Days Due From Assignment – use if you want to set a due date.
   iii. Date Due – the day training must be completed.

5. Click Next and then Exit wizard without sending e-mail notifications on the following screen and choose Close Window.

**Delete a course from a catalog or learning track.**

Follow the steps below to delete a course from a catalog or learning track.

1. Click on Manager Main Menu, choose Catalog Manager, choose the Courses tab.
2. Locate the correct catalog or learning track and click on the name.
3. Click on the Courses tab.
4. Locate the course you wish to delete and Click on the icon to remove a course from a catalog.
5. In the pop-up window, click on Delete. The course has now been deleted from the catalog or learning track. Please note, deleting a course catalog or learning track does not delete any course history.

**Allow learners to view the catalog by adding one at a time.**

Follow the steps below to add a learner to catalog one at a time.

1. Click on Manager Main Menu, choose Catalog Manager, then choose the People tab.
2. Click on the add icon to add a person to the catalog. In the pop-up window, enter their 9-digit UID and click Next.
3. Highlight their name on the screen and click Next. The person is now added to your catalog or learning track.

**Delete a person from your course catalog or learning track.**

Follow the steps below to delete a person from a catalog or learning track.

1. Click on Manager Main Menu, choose Catalog Manager, then People tab.
2. Locate the person in the catalog by scrolling on the page, or by entering their last name in the search field at the top and clicking on Go.
3. To delete, click on the icon to remove a person from a catalog. In the pop-up window, click Delete.
   NOTE – this only removes the learner from the course catalog or learning track, it does not delete any course history or delete them from Learn@ISU.
Assignment Criteria
Used to allow groups of learners to view the catalog by adding a group at a time.

Follow the steps below to assign a flexi-group to a catalog.

1. Click on Manager Main Menu, choose Catalog Manager, then choose the Assignment Criteria tab.
2. Click on the add icon to add a group to the catalog.
   a. Choose the name of the flexi-group from the list and click Next.
   NOTE – If you wish to have your catalog go to All Users in Learn@ISU, choose the All Users flexi-group. There are also groups from faculty, students, student employees, and staff only.

Follow the steps below to delete a flexi-group from a catalog.

1. Click on Manager Main Menu, choose Catalog Manager, then choose the Assignment Criteria tab.
2. Click on the icon to remove a group from a catalog. In the pop-up window, click Delete. Note – this only removes the learner from the course catalog or learning track, it does not delete any course history or delete them from Learn@ISU.

Master Schedule
Master Schedule is used to manage classroom courses.

Add a Class to the Schedule
Follow the steps below 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. Complete 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.
7. 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.
Follow the steps below to schedule topics (courses from a one-day training session).

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

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

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

4. 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.

5. 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.
6. Review your choices. If you are satisfied with your choices select Next. If you are not satisfied, choose Back or Reset and start over.

7. 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.

8. 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.

9. Select Save to save changes and then select Close Window to close the window and return to the session screen.

Scheduling Sessions for a Workshop/Multi-day Training

Follow the steps below to schedule sessions for a workshop/multi-day training.

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

2. Use the green plus sign to add a session and enter information for the required fields
   a. Start Date / End Date
   b. Start Time / End Time
   c. Duration
   d. Delivery – choose Instructor Led or Webinar (virtual session)
   e. Location (building) and Venue (room number or webinar)

3. Set the time zone.
4. Click Save and Close Window or Save and Add Another.
5. Two sessions now appear under the Sessions tab and on the Master Schedule.

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

7. 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.

Follow the steps below to have a class deleted from the Master Schedule.

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.

Do not edit any of the fields on the Properties tab after the course has been placed on the Master Schedule. If you need to make changes, follow the steps below.

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
Follow the steps below to edit/update information for a classroom course.

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

2. Edit the fields as needed (Start/End Date, Start/End Time, Duration, Delivery, Location, or Venue)
3. Select Save to make changes.

Add / Update a Trainer
This option allows you to add or update a trainer for a classroom training course.

Follow the steps below to add a trainer.

1. Click on the Trainers tab
2. Click on the green plus sign
3. Click Show All Trainers to see a list of trainers in the system. Scroll through the list, locate the trainer you wish to add, and click on the Add button. If scheduling multiple sessions, select a training for each session.
4. Click Next when you are done adding trainers.

Follow the steps below to remove a trainer.

1. Click on the Trainers tab
2. Click on the green plus sign
3. Locate the trainer in the column on the right side, click on their name and click on Remove. Click on the Close Window button in the next window. You are taken back to the trainers page and can see the current trainers for the course.
Meal Choices
Learn@ISU does not use this option.

Using the Event Workflow Tab

1. Go to the Event Workflow tab. There are several options here for you, they include:
   a. Event Enrollment – add participants to the course
   b. Print Class Roster – print the roster to be used as a sign-in sheet
   c. Print blank roster – print a blank roster for the course
   d. Name badges – Learn@ISU does not use
   e. Email participants – send an email to the participants
   f. Cancel event – cancel the event
   g. Reschedule the event – move the event to another date
   h. Copy Event – we do not use
   i. Event Update – used after the event has been held to update learner history

Enroll Participants

There are two options for administrators to enroll participants in a classroom course. Administrators can click on the Participants tab, or Event Workflow. Your first choice is always to have participants enroll themselves in a course.

Follow the steps below to add participants using the participants tab.

1. Click the green plus sign to add a person to the class.
2. Enter the learners 9-digit university ID number or search by their last name (NOTE – UID number is always the best option)
3. Click Next to locate the person and add the person
4. Select person by highlighting their name and click Next.

5. If you have more people to add, choose Select more Learners for the class. If not, choose Update the class roster and send e-mail confirmations.

6. Click Next.

---

**Event Workflow tab**

Follow the steps below to add participants using the Event Workflow tab.

1. Select Event Enrollment. Opening Event Enrollment opens the exact same workflow window as using the Participants tab.

2. Enter the learners 9-digit university ID number or search by their last name (NOTE – UID number is always the best option)

3. Click Next to locate the person and add the person
4. Select person by highlighting their name and click Next.

5. If you have more people to add, choose Select more learners for the class. If not, choose Update the class roster and send e-mail confirmations. Click Next.

---

Removing a Participant
Delete participants only if they were added to a class by mistake (this different than cancelling a participant).

Follow the steps below to remove a participant from a classroom course.

1. Open the participant tab.
2. Find the name of the participant to delete and select the red X. Follow the instructions displayed in the delete confirmation window.

---

Cancelling a Participant
This is used when a participant needs to cancel out of the course. Do not delete them, deleting them will remove their enrollment history. Participants can cancel themselves from a course and that is recommended, however there may be times when you do not allow a participant to cancel themselves from a course. Cancelling them will update their training history and show the training as cancelled and allow them to re-enroll in another session later/time.

Follow the steps below to cancel a participant from a classroom course.

1. Open the participant tab and locate the participant to cancel.
2. Click on the by the person you wish to cancel a window opens.
3. In the window, find status field and change from Enrolled to Cancelled, then click Save. The roster updates indicating the person has been cancelled from the class.
**Waitlisted Participants**

It is recommended to set your classroom course 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 steps below to change a participant’s status from Waitlisted to Enrolled.

1. Open the participant tab and locate the participant to move from waitlist to enrolled.
2. Click on the  by the person you wish to enroll a window opens.
3. In the window, find the status field and change from Waitlist to Enrolled, then click Save. The roster updates indicating the person has been added to the course.

   **NOTE** – if the system will not allow you to move someone from Waitlist to Enrolled, go to the Properties tab and adjust your Maximum Class Size, then follow the steps above.

**Print Class Roster & Print Blank Roster**

Follow the steps below to print a class roster or blank class roster.

1. Click on the Event Workflow tab.
2. Click on the Print Class Roster or Print Blank Roster link – a new window opens, print from your browser. As a reminder, the Print Blank Roster is blank sign in sheet for the course if needed.

**Email Participants**

LEARN@ISU sends out automated emails when a person enrolls in a classroom training course. This email feature allows administrators to send out emails to participants who have enrolled in a class prior to the event.

Follow the steps below to send out emails to classroom course participants.

1. Access the Event Workflow tab and click on Email Participants (Note – if there are no participants, you are unable to proceed).
2. Highlight the participants for the learners field whom you wish to send the email to, and then highlight the email template you wish to use. Click Next after choosing the email template.
3. Review the body of the email, you can change the following information:
   a. Email from
   b. CC Other (add an email address)
   c. CC Manager
   d. Email Subject

4. Select Next to send the email to participants. If you wish to send another email, choose the button on the screen and click Next, otherwise choose Return to Event Workflow page and click Next.

Cancel Event
This is used when you need to cancel a scheduled, classroom training course.

Follow the steps below to cancel a classroom course.

NOTE – it is recommended you take a copy of the class roster prior to cancelling. This will make it easier if you plan to manually enroll participants in another session.

1. From the Event Workflow tab, choose Cancel Event
2. In the next window choose the following:
   a. Email template
   b. Email from Address
   c. Complete Cancel Reason
   d. Choose “Cancel the class and send email to participants”
3. Click Next to send the cancellation email to participants.

4. The screen will close, and the class is removed from the Master Schedule.

Reschedule Event
This is used when you need to reschedule a classroom training course.

Follow the steps below to cancel a classroom course.

1. From the Event Workflow tab, choose Reschedule Event
2. Complete the following fields:
   a. New Start Date
   b. New Start Time
   c. Choose the Email template
   d. Choose the Email From Address
   e. Enter a Reschedule Reason
   f. Choose “Reschedule the class and send email to the participants”
   g. You can choose either “Include cancelled participants in the emails” or “Do not include cancelled participants in the emails”

3. Click Next to reschedule the class and send an email to participants.

   The screen closes, and the class is rescheduled on the Master Schedule.
Event Update
Use the Event Update feature on the Event Workflow tab to record enrollment for a class that has been held.

NOTE – it is very important you update your event after it is finished. If you do not, participants are unable to register in the event if it is offered again because Learn@ISU shows them in enrolled in another session. Because they are enrolled in another session, the system does not allow a participant to enroll in a new offering.

Follow the steps below to update a completed event.

1. From the Event Workflow tab, click on Event Update

2. In the next screen, the default is “By Last Name” leave as is and click Next.

3. Set the Default Values, the choices are:
4. Status = Enrolled, Finished, Cancelled, or No Show
5. Pass/Fail = In Progress, Requirement Met, Pass, Fail, or NA
6. Use the signed class roster to use as a guide to determine which participants attend the class

NOTE – if you have cancellations, or no shows, you must manually change the person, otherwise they will be set to the default you choose. For cancellations and no shows, set the values to No Show and NA.

7. Select Next to record the enrollment.
8. 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.
Event Audit
This is a read-only tab, it shows all actions that were taken for the class during the setup. There are no actions that can be completed on this screen.

Allocate 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.

Follow the steps below to allocate seats for a classroom course.

1. Click on the Allocate Seats tab
2. Click on the green plus sign
3. In the Flexi-Group down box, locate the name of your flexi-group and click on it.
4. Enter the number of seats you are holding in the Maximum Size field.
5. Choose Save a Close Window if this is the only group to add, if you have additional groups, click Save and Add Another.
6. If there are additional seats in the class that are open to the general campus population, you need to add the All Users flexi-group to this event to all others to enroll. Follow steps 1-5 above to add them.

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.

Follow the steps below to add a document or documents to your classroom course.

1. Click on the Class Documents tab
2. Click on the green plus sign to add a document, the Add Document window opens.
3. Choose the Document Type and select Next.

4. Enter the document title, upload the document file and select Next. The window closes, and the document is posted.

5. If you need to delete the document, select the red X to remove the document from the classroom course.

Event Log Viewer
This is a read-only tab that keeps track of any communication sent by Learn@ISU to participants in a classroom course. Please note, if you cancel a course, this information is removed and not able to be recovered.

Administration Menu
This menu is for those who have access to add/edit/delete users from their flexi-groups. Access to this menu is controlled by permissions in Learn@ISU. Only those with permission can access this menu.

Adding Individuals to a Flexi-Group

Follow the steps below to add individuals to 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, 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 daily.

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.

   a. 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

Follow the steps below to delete 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 daily.
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 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

Use the steps below to add courses to 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, 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).
4. Learn@ISU will complete the initial set up of your group, this includes:
5. Entering the type of group, name of the group (supplied by you) and assigning the group to the correct individuals.
6. Choose the link that your group is a part of to continue (Learn@ISU will share this with you when you are granted access).
7. In the Search box, type the name of your group, then click Go.

8. 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 daily.

9. 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.

10. Click on the Filters tab across the top to access your courses.

11. 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.

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

13. 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.)

14. Click Next to Test the Next Flexi-Group. This will show if your entries were done correctly.
15. 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.

16. 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.

17. 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.

18. 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.

19. 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

Use the steps below to delete 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.
7. 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 daily.

8. 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.

9. Click on the Filters tab across the top to access your courses.

10. Find the course by the Course ID by searching using either Control + F (PC) or Command + F (Mac). Once the Course ID has been 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.

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

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 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.

14. 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

Follow the steps below to add a catalog to 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, 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).
4. Learn@ISU will complete the initial set up of your group, this includes:
5. Entering the type of group, name of the group (supplied by you) and assigning the group to the correct individuals.
6. Choose the link that your group is a part of to continue (Learn@ISU will share this with you when you are granted access).
7. In the Search box, type the name of your group, then click Go.
8. 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 daily.
9. 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.
10. Click on the Filters tab across the top to access your courses.
11. 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.
12. When finished entering all Catalog ID number, click Next at the bottom of the screen to continue.

13. 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.)

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

15. 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.

16. 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.

17. 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.

18. 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

19. 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**

Use the steps below to delete a catalog 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 daily.

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 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.
## Naming Convention Information for Catalogs and Courses

<table>
<thead>
<tr>
<th>Department / Unit</th>
<th>Catalog ID</th>
<th>Course ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ames Laboratory</td>
<td>ALAB</td>
<td>ALAB</td>
</tr>
<tr>
<td>Animal Science</td>
<td>ANML</td>
<td>ANMLS</td>
</tr>
<tr>
<td>Civil, Construction and Environmental Engineering</td>
<td>CCEE</td>
<td>CCEE</td>
</tr>
<tr>
<td>Center for Excellence in Learning and Teaching</td>
<td>CELT</td>
<td>CELT</td>
</tr>
<tr>
<td>Center for Industrial Research and Service</td>
<td>CIRAS</td>
<td>CIRAS</td>
</tr>
<tr>
<td>College of Engineering</td>
<td>COE</td>
<td>COE</td>
</tr>
<tr>
<td>Controller’s Office</td>
<td>CONTR</td>
<td>CONTR</td>
</tr>
<tr>
<td>College of Veterinary Medicine</td>
<td>CVM</td>
<td>CVM</td>
</tr>
<tr>
<td>E-Commerce</td>
<td>ECM</td>
<td>ECM</td>
</tr>
<tr>
<td>Environmental Health and Safety</td>
<td>EHS</td>
<td>EHS</td>
</tr>
<tr>
<td>Office of Equal Opportunity</td>
<td>EO</td>
<td>EO</td>
</tr>
<tr>
<td>Emergency Operations Management</td>
<td>EOM</td>
<td>EOM</td>
</tr>
<tr>
<td>Green Dot</td>
<td>GDOT</td>
<td>GDOT</td>
</tr>
<tr>
<td>Improved Service Delivery</td>
<td>ISD</td>
<td>ISD</td>
</tr>
<tr>
<td>Iowa State University Research Farms</td>
<td>ISRF</td>
<td>ISRF</td>
</tr>
<tr>
<td>ISU Foundation</td>
<td>ISU Foundation</td>
<td>ISU Foundation</td>
</tr>
<tr>
<td>ISU Police</td>
<td>ISU Police</td>
<td>DPS</td>
</tr>
<tr>
<td>ISU Dining</td>
<td>ISU-Dining</td>
<td>DIN</td>
</tr>
<tr>
<td>Office of University Counsel</td>
<td>LGL-OUC</td>
<td>LGL-OUC</td>
</tr>
<tr>
<td>University Library</td>
<td>LIB-WKSP</td>
<td>LIB</td>
</tr>
<tr>
<td>Department</td>
<td>Abbreviation</td>
<td>Abbreviation</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>--------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Motivational Hub</td>
<td>MIHUB</td>
<td>MIHUB</td>
</tr>
<tr>
<td>Materials Science and Engineering</td>
<td>MSE</td>
<td>MSE</td>
</tr>
<tr>
<td>Office of Intellectual Property and Technology Transfer</td>
<td>OIPPT</td>
<td>OIPPT</td>
</tr>
<tr>
<td>Printing Services</td>
<td>PRINT</td>
<td>PRING</td>
</tr>
<tr>
<td>Professional &amp; Scientific Council</td>
<td>PSCOUN-</td>
<td>PSCOUN</td>
</tr>
<tr>
<td>Pesticide Education Safety Program</td>
<td>PSEP</td>
<td>PSEP</td>
</tr>
<tr>
<td>Procurement Services</td>
<td>PURCH</td>
<td>PURCH</td>
</tr>
<tr>
<td>Recreation Services</td>
<td>Rec Ser</td>
<td>REC</td>
</tr>
<tr>
<td>Office of the Registrar</td>
<td>Registrar</td>
<td>REG-ERS</td>
</tr>
<tr>
<td>Reiman Gardens</td>
<td>RG</td>
<td>RG</td>
</tr>
<tr>
<td>Office of Risk Management</td>
<td>RISKMGT</td>
<td>RISK</td>
</tr>
<tr>
<td>Senior Vice President and Provost</td>
<td>SVPP</td>
<td>SVPP</td>
</tr>
<tr>
<td>Transportation Services</td>
<td>TRANSPORTATION</td>
<td>RISK</td>
</tr>
<tr>
<td>University Human Resources</td>
<td>UHR</td>
<td>UHR</td>
</tr>
<tr>
<td>Vice President for Diversity and Inclusion</td>
<td>VPD1</td>
<td>VPD1</td>
</tr>
<tr>
<td>Vice President for Research</td>
<td>VPR</td>
<td>VPR</td>
</tr>
<tr>
<td>WorkCyte</td>
<td>WKC</td>
<td>WKC</td>
</tr>
<tr>
<td>World Language and Cultures</td>
<td>WLC</td>
<td>WLC</td>
</tr>
</tbody>
</table>