GSA ONLINE UNIVERSITY

GSA LMSJOB AID SERIES

# Getting Started: GSA ONLINE UNIVERSITY

## Curricula 102 Job Aid

### *Curricula 102 Job Aid Overview*

*This job aid is a continuation of the items discussed in the Curricula 101 job aid. The Curricula 102 job aid provides step-by-step instructions for tasks relevant to curricula management in the GSA OLU (powered by SAP). Topics covered in this job aid include: user management, email notifications, and reporting.*

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# Curricula 102 Job Aid

## CURRICULUM ASSIGNMENT

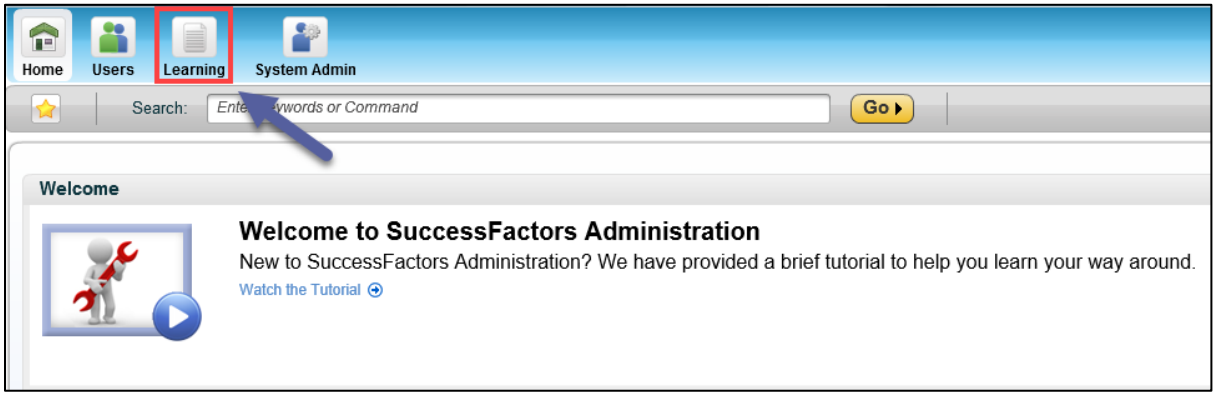
### Review Curriculum Contents

A Curriculum is a set of one or more items that can be assigned and tracked as a group. It is most commonly used for certification tracking, regulated/ compliance driven training, recurring training, previously completed training credits, and choice completion requirements (ex: complete any 2 out of 3 courses for certification).

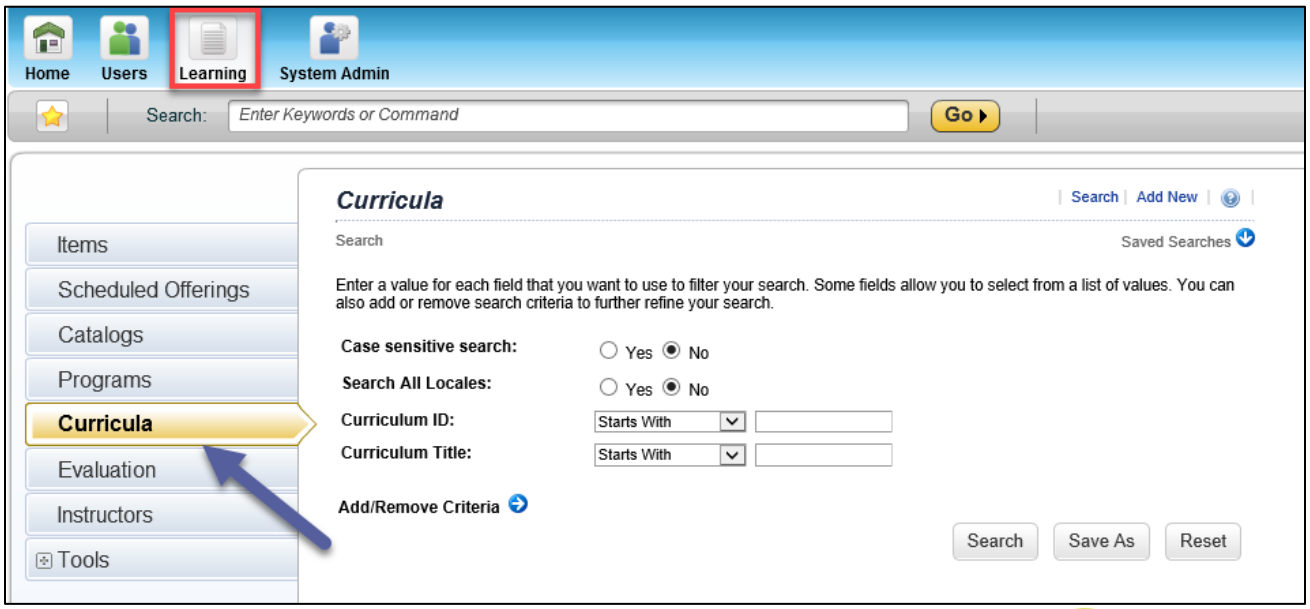
Before a curriculum can be assigned, the curriculum content components must be edited to ensure accurate required dates.

#### *Curriculum Contents Area Navigation*

1. From the Learning Administration page (also called SuccessFactors Administration), click on the "Learning" icon.




2. Click on the Curricula tab in the left menu frame. You will be directed to the area of the system where you can search and view the Curriculum you wish to assign.

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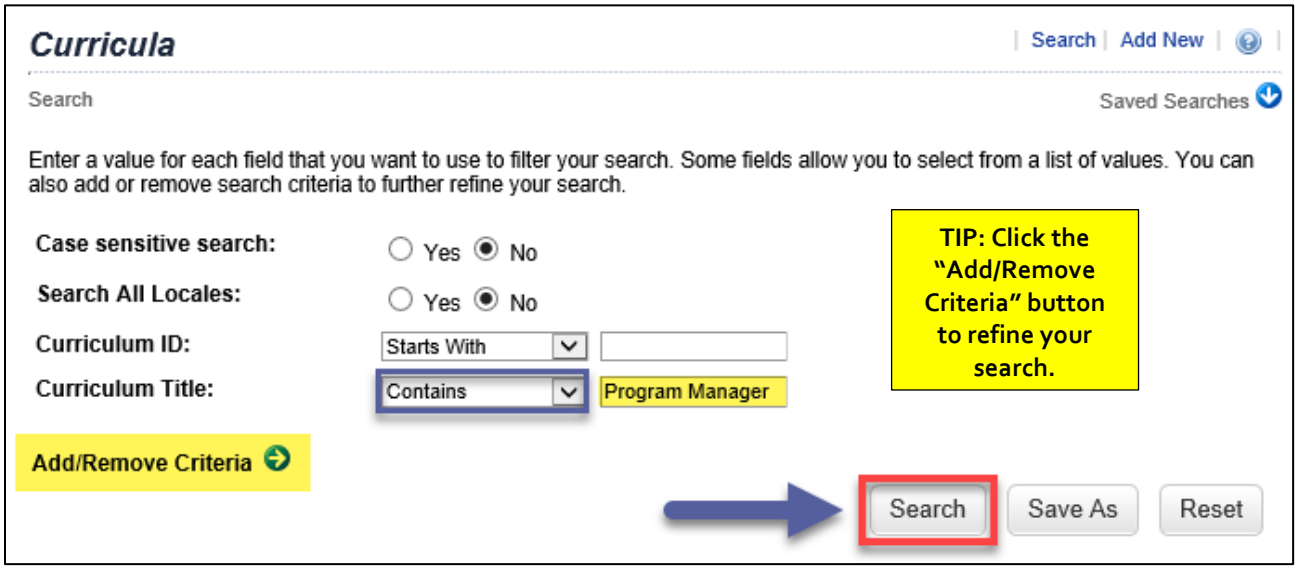
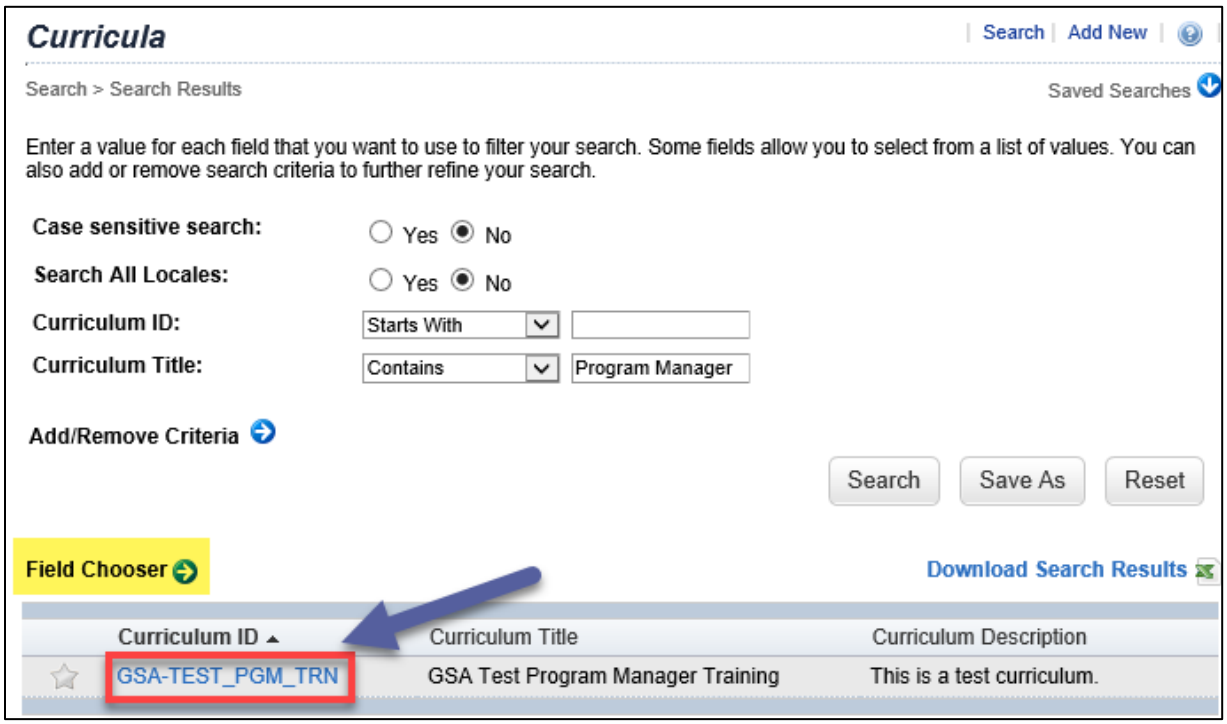
3. Enter the *Title* of your desired curriculum. You can use the drop-down menu associated with most criteria to refine your search (ex: "starts with" vs. "contains"). Click **Search** to search for your desired curriculum.




4. Locate your desired curriculum. Click on the *Curriculum ID* to select and open the curriculum.

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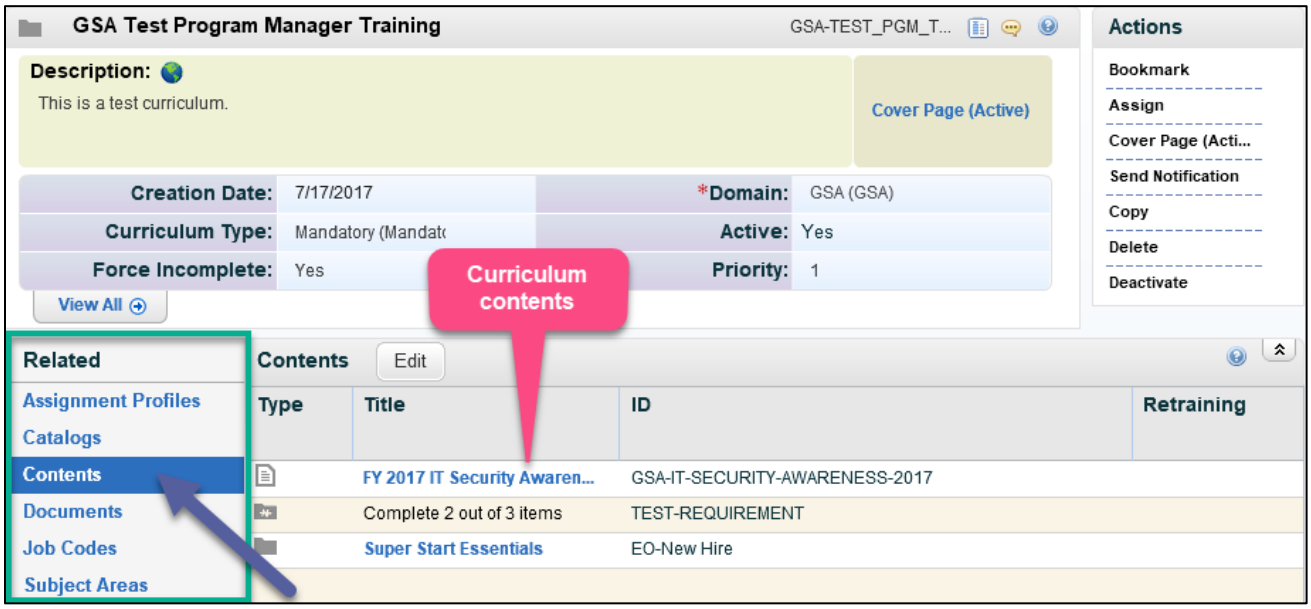
5. On the Curriculum Administration Page, locate the Related Menu and click **Contents**. You are now in the curriculum contents area where Learning Administrators associate learning items, map requirements, and add subcurricula.

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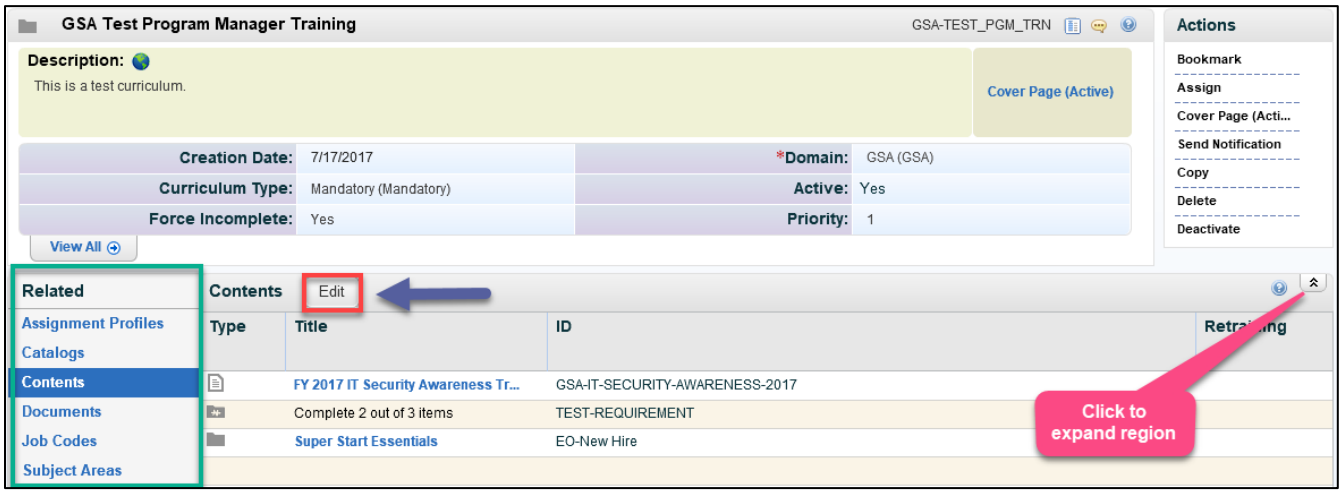
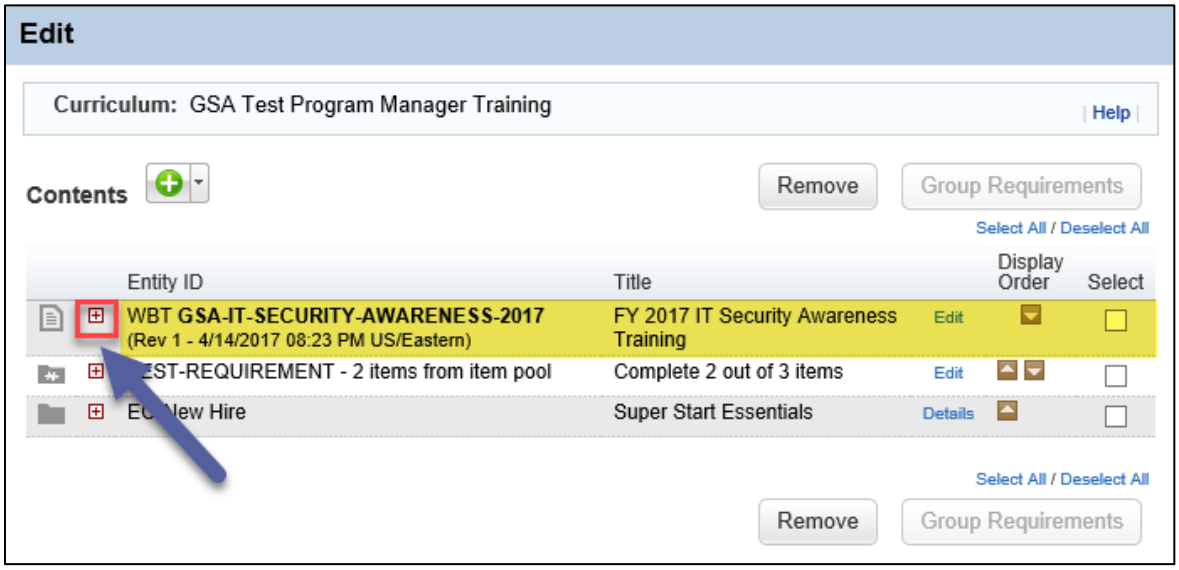
## Review Curriculum Contents

### *Review Curriculum Content Component Details*

1. From the Curriculum Administration Page of your desired curriculum, locate the Contents area (in the Related Menu), and click **Edit.** For better viewing, click on the icon to expand the region.




2. A pop-up window will open. Locate the learning component you wish to review on the Contents Edit page. Click on the expand icon to expand the component and view details.

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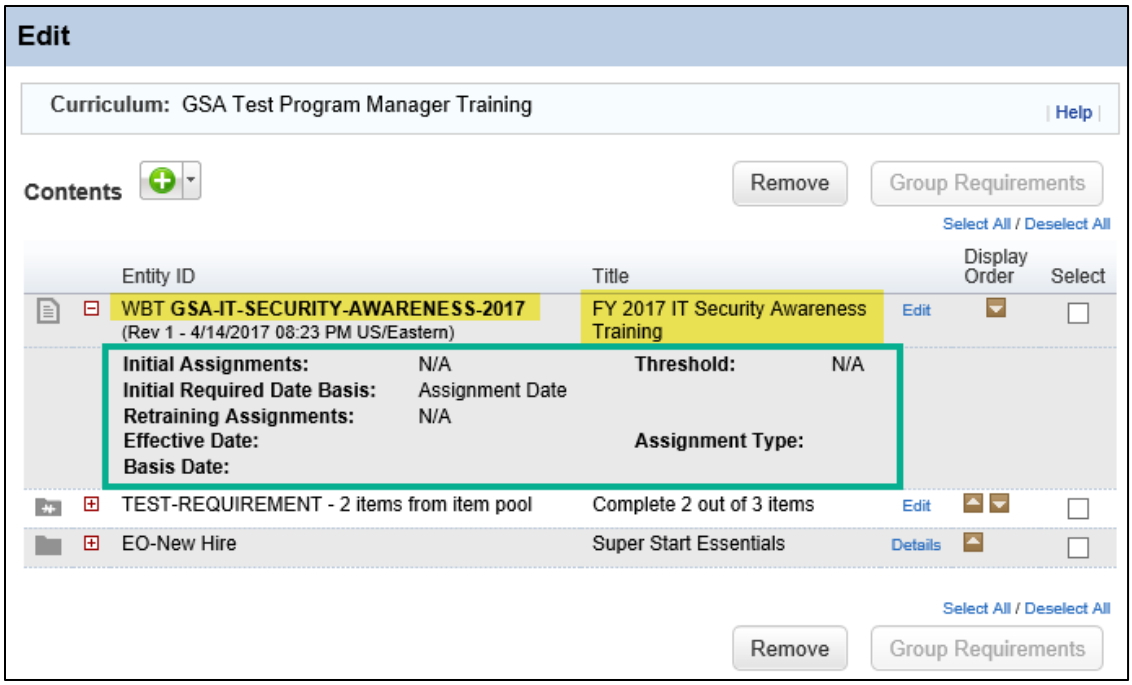
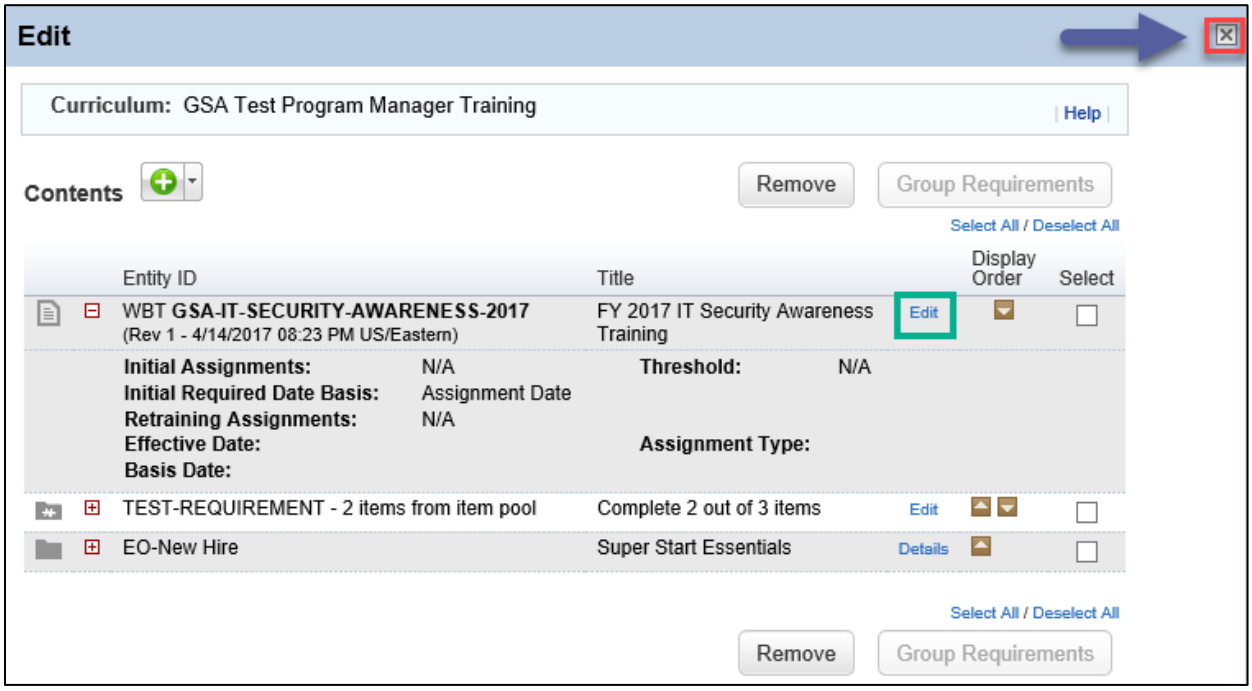
3. The expanded area, depending on the component type (item, requirement, subcurricula), will display default details pertaining to that specific component.
   **NOTE: Requirements and subcurricula will also include the items attached within them in the expanded components view.




4. Once details have been reviewed, click on the **Edit** button to edit the component details or click on the "**X**" in the top right corner of the Edit Contents page to return to the Curriculum Administration page.

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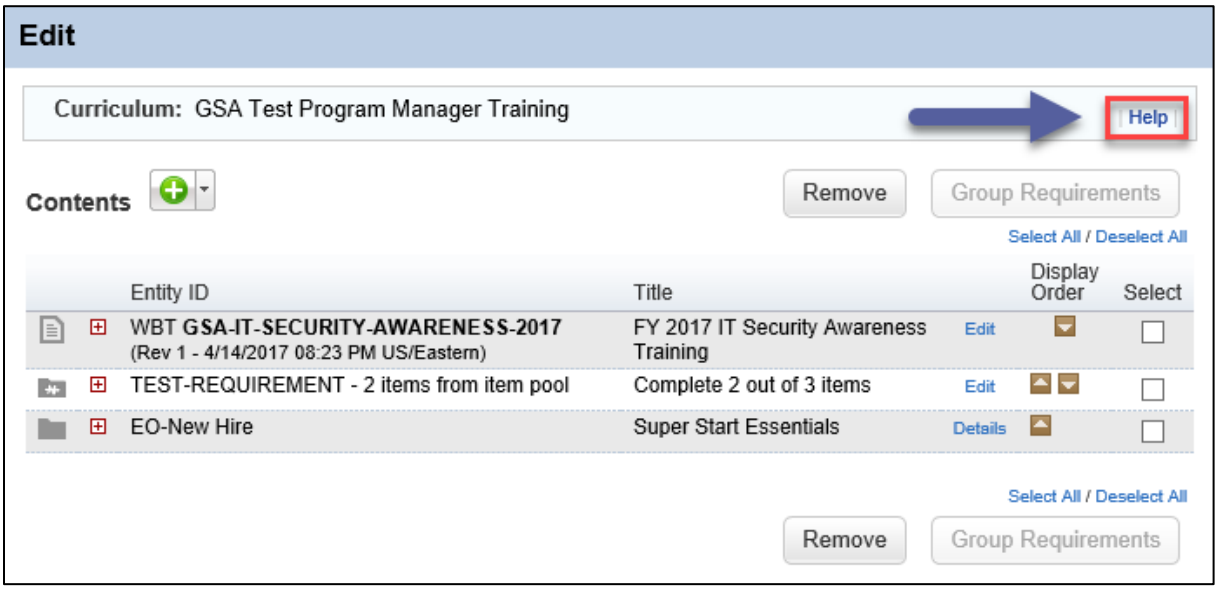
## Edit Curriculum Contents

Curriculum components must be edited to reflect a due date ***before*** the curriculum is assigned to users. This tells the system that the curriculum needs to be assigned as a "Period-Based Assignment to users"

**Period-Based Assignment Rules for Curriculum Components**

- All new periods start at midnight. Therefore, the required date (due date) for any item is 11:59:59 PM the day before the next period starts.
- There are five period options that can be used to select a required date: Days, Weeks, Months, Quarters, or Years.
- There are two ways to identify a due date for the curriculum component:
  - Calendar – based on a basis date (used to calculate the due date).
  - Event – requires an event (completion) to occur to set the period due date.
- If a user completes an item after its required date, then the system applies that completion to the current period:
  - Calendar Basis - The system cannot allow a calendar-based assignment to have a due or required date that is anything other than the end of the current period. If a user completes the item late, the system must still give the user a full period in which to complete this item. Therefore, to get the proper credit for a curriculum, the user must complete the item during its intended period.
  - Event Basis - The system can allow the period to extend until the next event occurs (when the user next completes the item). Therefore, after recording the event, the system sets up a new period and a new required date for the item based on this most recent completion.
- As an administrator, you cannot change the status of a curriculum by manually changing the required date of any item that is in the curriculum. The system always uses the settings of the curriculum record to determine the correct curriculum status.

***It is recommended that administrators utilize the SAP Help Portal to review period-based assignment setup and examples. You can access the SAP Help Portal by clicking on the "Help" button located in the top right corner of the Contents Edit page.***

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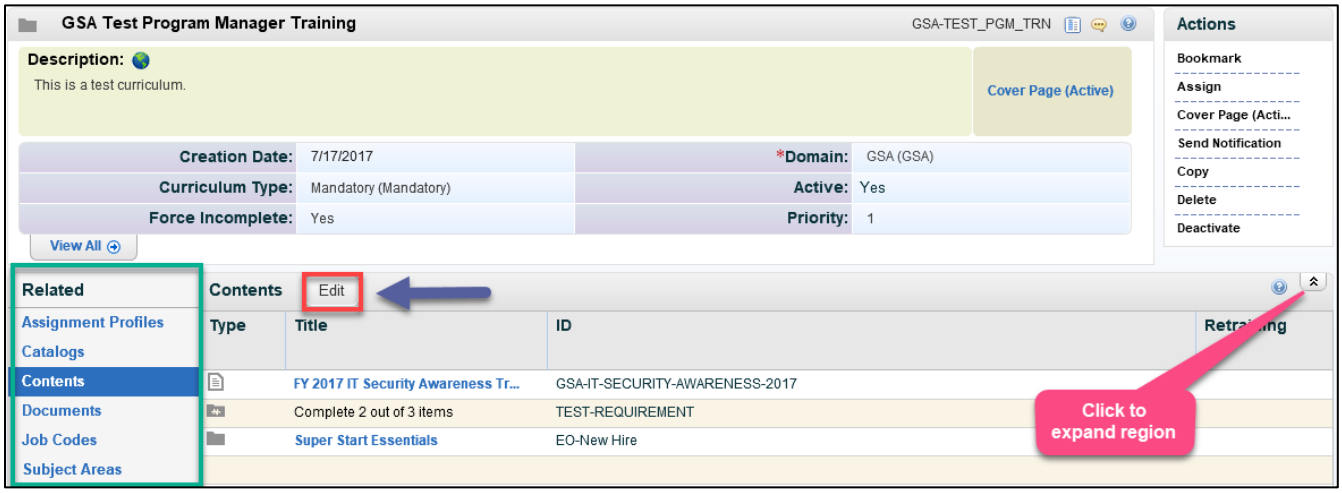
## Period Based Assignments

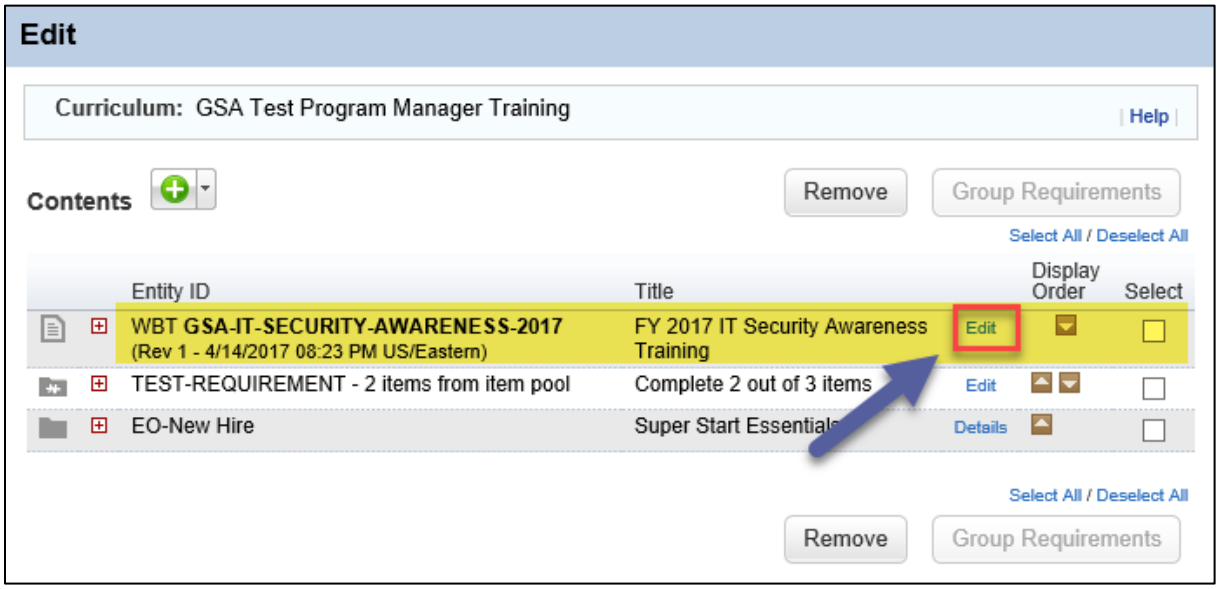
### *Calendar-Based Assignment*

It is recommended that administrators utilize the SAP Help Portal to review period-based (calendar/ event) assignment setup and examples. You can access the SAP Help Portal by clicking on the "Help" button located in the top right corner of the Contents Edit page.

1. From the Curriculum Administration Page of your desired curriculum, locate the Contents area (in the Related Menu), and click **Edit.** For better viewing, click on the icon to expand the region.




2) A pop-up window will open. Locate the learning component you wish to edit on the Contents Edit page. Click on **Edit** to edit the component's details.

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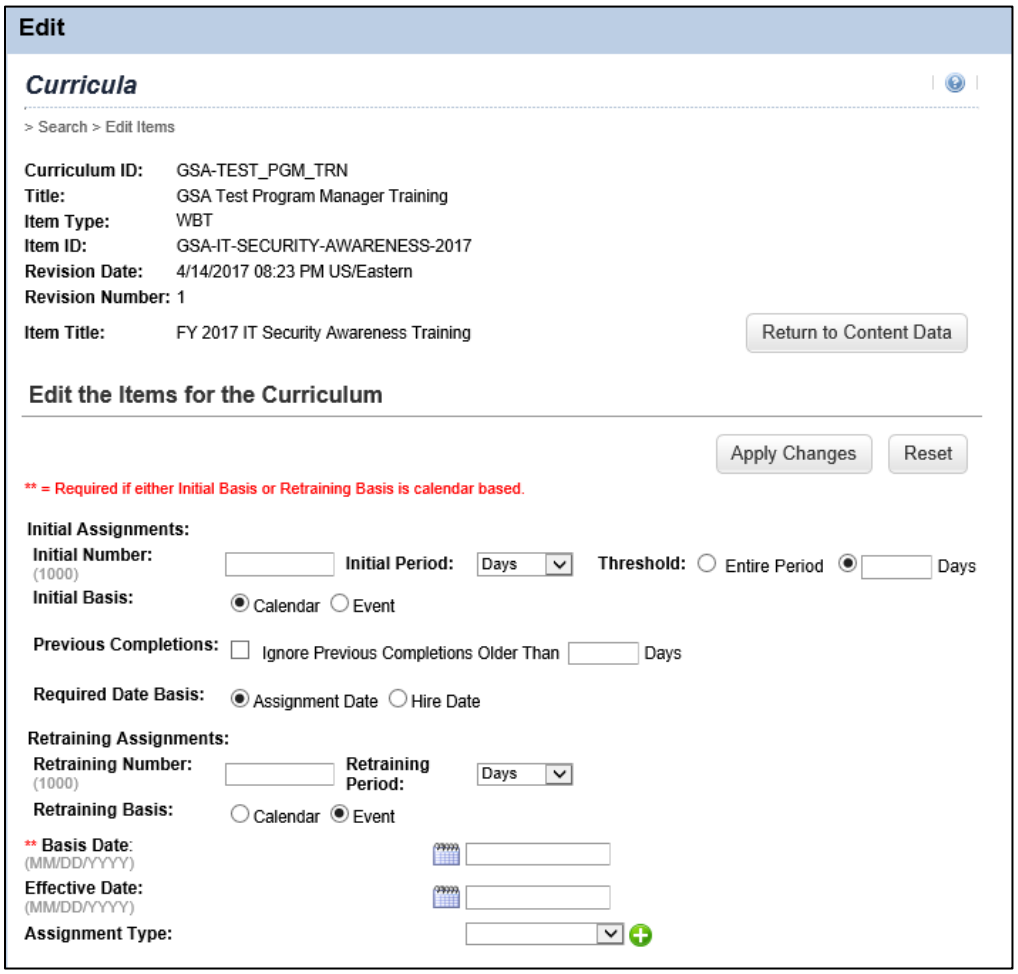
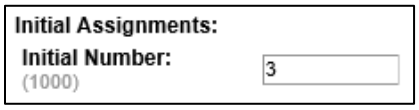
3) A pop-up window will open. Enter in the appropriate fields.




4) Enter *Initial Number*. Ex: if you want to give learners 3 months to complete the items, enter "3" for the initial number.




5) Enter *Initial Period*. Ex: if you want to give learners 3 months to complete the items select "months" for the initial period.

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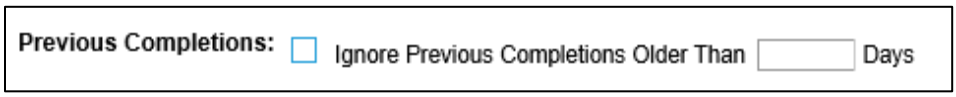
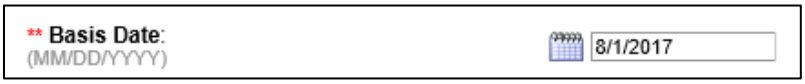
6) Select "**Calendar**" as the *Initial Basis.*

7) *Previous Completions*: use this area to indicate if (and how far back) you want the curriculum to ignore previous completions of this specific component.

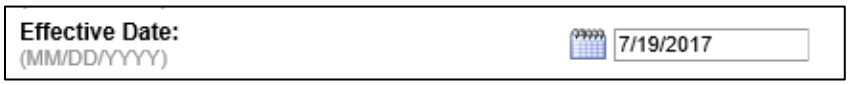



8) *Required Date Basis*: use this area to indicate if you want the curriculum to base the curriculum assignment process based on the assignment date or hire date.

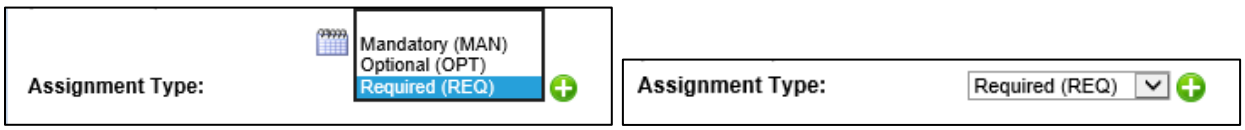
9) *Basis Date*: the system uses the basis date to calculate the periods and, therefore, the item's required dates. Basis date = due date – initial period. For example, if your desired due date is 8/14/17 and you indicated an initial period of 2 weeks, then your basis date will be 8/1/17.
**NOTE**:
   I. All new periods start at midnight. Therefore, the required date (due date) for any item is 11:59:59 PM the day before the next period starts. Example if you indicate a basis date of 8/1/17 with an initial period of 2 weeks, your items' required date will be 8/14/17 at 11:59:59 PM not 8/15/17.
   II. If the Initial or Retraining Basis is Calendar, then If Initial or Retraining Basis is Event, then the system does not use the value in the Basis Date box; instead, the system uses the event date to calculate only the next period and, therefore, the item's next required date. If another "event" occurs, then the system uses that event date to calculate the subsequent period and, therefore, the item's next required date.




10) *Effective Date*: use this to indicate the date you want changes to this item to become available to the user. It is recommended that the effective date be at least 1 day before the basis date. The system also uses the Effective Date to calculate the overall status of the curriculum.




11) *Assignment Type*: use this to indicate the item's assignment type. The system displays the assignment type in the user interface so that users know whether the item is mandatory, required, or optional.
**NOTE**: The Effective Date is required if a "Required" assignment type is selected.

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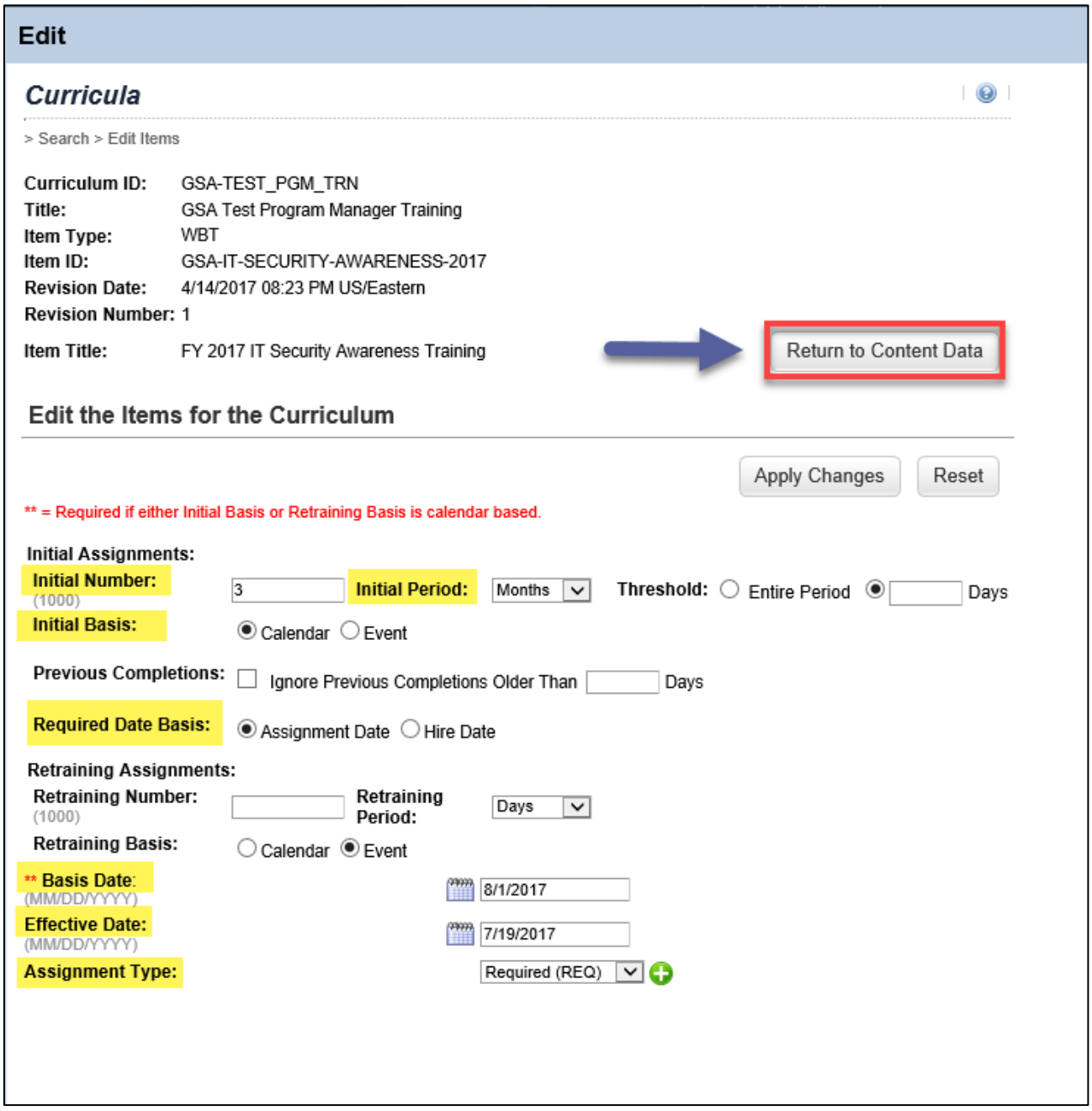
12) Once all the appropriate fields have been entered, click **Apply Changes** to save the component details. You will be redirected to the Contents Edit page.




13) Repeat steps 2 – 12 to edit another component's details.

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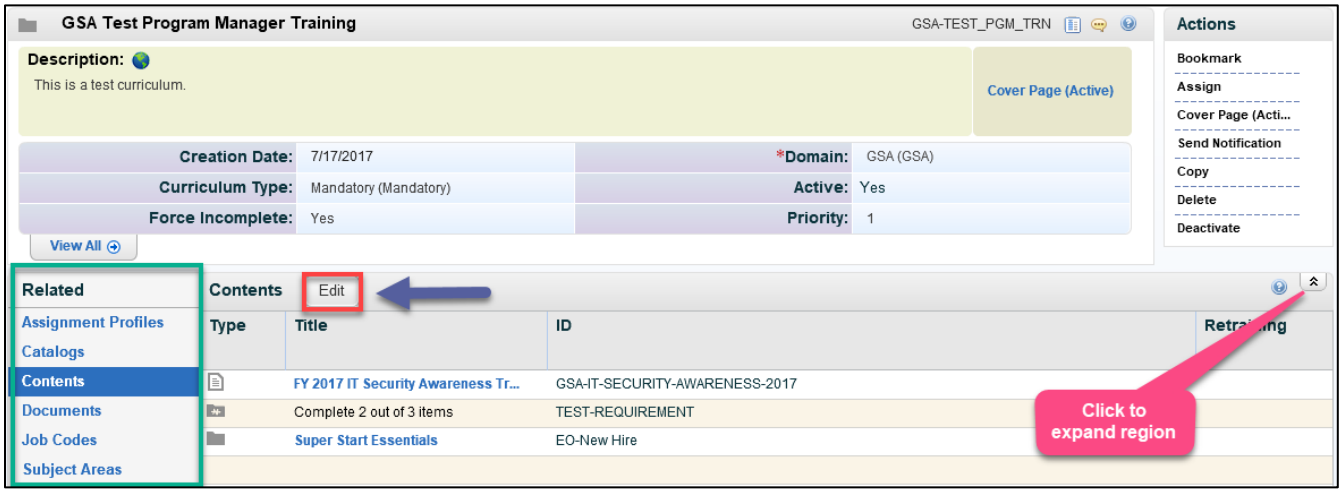
## Period Based Assignments

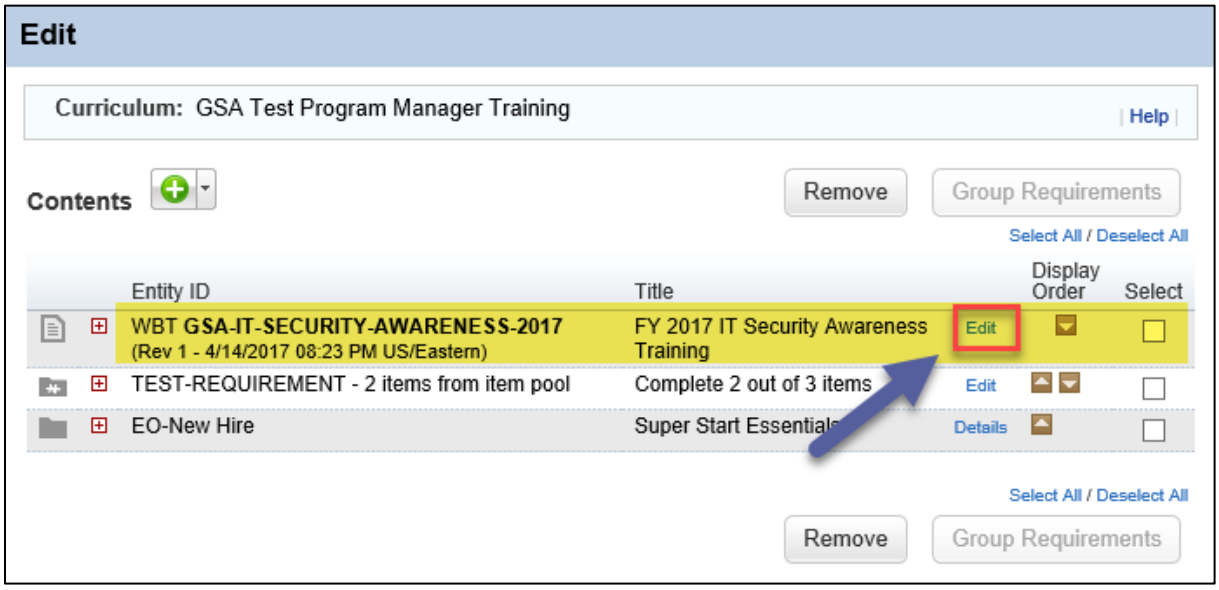
### *Event-Based Assignment*

It is recommended that administrators utilize the SAP Help Portal to review period-based (calendar/ event) assignment setup and examples. You can access the SAP Help Portal by clicking on the "Help" button located in the top right corner of the Contents Edit page.

1. From the Curriculum Administration Page of your desired curriculum, locate the Contents area (in the Related Menu), and click **Edit.** For better viewing, click on the icon to expand the region.




2. A pop-up window will open. Locate the learning component you wish to edit on the Contents Edit page. Click on **Edit** to edit the component's details.

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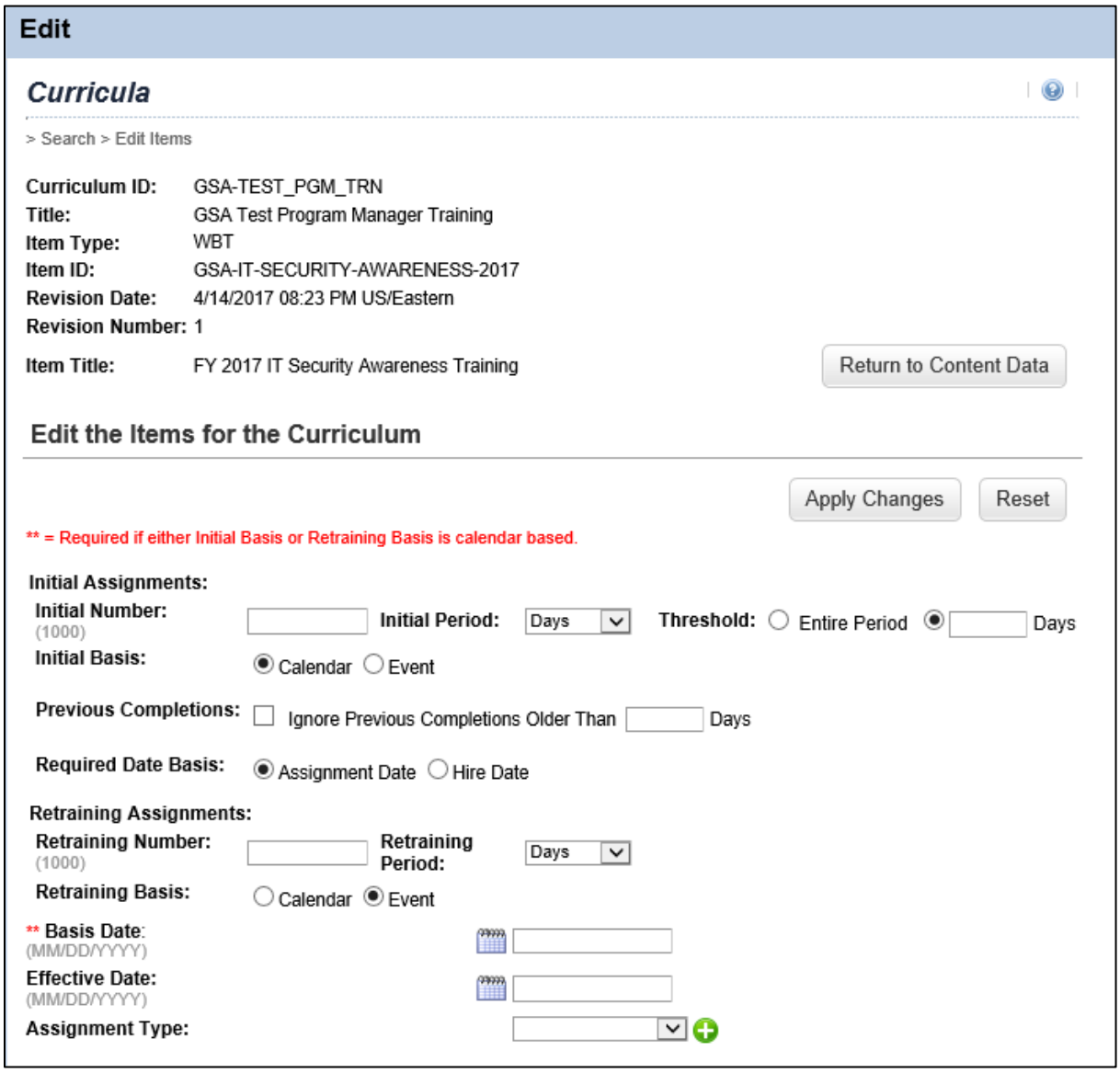
3. A pop-up window will open. Enter in the appropriate fields.




4. *Initial Number*: Not required for event-based assignments.

5. *Initial Period*: Not required for event-based assignments.

6. *Threshold*: Not required for event-based assignments.

7. Select "**Event**" as the *Initial Basis.*

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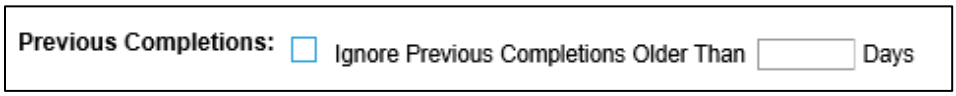
8. *Previous Completions*: use this area to indicate if (and how far back) you want the curriculum to ignore previous completions of this specific component.



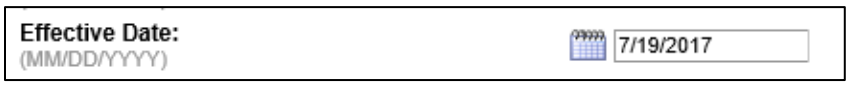

9. *Required Date Basis*: use this area to indicate if you want the curriculum to base the curriculum assignment process based on the assignment date or hire date.

10. *Retraining Number*: Not needed for one-time assignments.

11. *Retraining Period*: Not needed for one-time assignments.

12. *Basis Date*: Not required for event-based assignments.
****NOTE**:
    I. All new periods start at midnight. Therefore, the required date (due date) for any item is 11:59:59 PM the day before the next period starts.
    II. If the Initial or Retraining Basis is Calendar, then If Initial or Retraining Basis is Event, then the system does not use the value in the Basis Date box; instead, the system uses the event date to calculate only the next period and, therefore, the item's next required date. If another "event" occurs, then the system uses that event date to calculate the subsequent period and, therefore, the item's next required date.

13. *Effective Date*: use this to indicate the date you want changes to this item to become available to the user. It is recommended that the effective date be at least 1 day before the basis date. The system also uses the Effective Date to calculate the overall status of the curriculum.




14. *Assignment Type*: use this to indicate the item's assignment type. The system displays the assignment type in the user interface so that users know whether the item is mandatory, required, or optional.
****NOTE**: The Effective Date is required if a "Required" assignment type is selected.

15. Once all the appropriate fields have been entered, click **Apply Changes** to save the component details. You will be redirected to the Contents Edit page.

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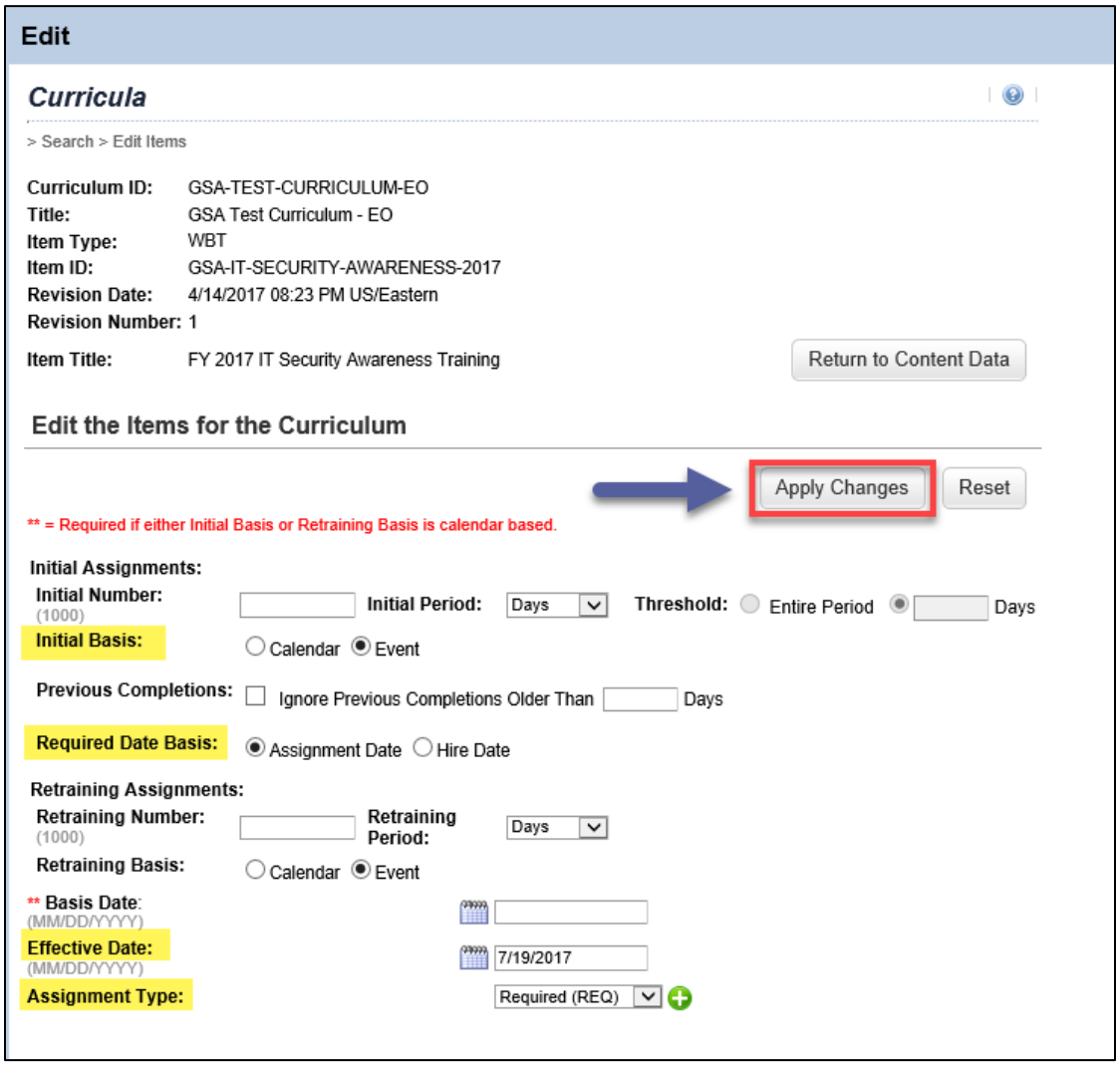


16. Repeat steps 2 – 15 to edit another component's details.

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## Assign Curricula

A Curriculum is a set of one or more items that can be assigned and tracked as a group. It is most commonly used for certification tracking, regulated/ compliance driven training, recurring training, previously completed training credits, and choice completion requirements (ex: complete any 2 out of 3 courses for certification).

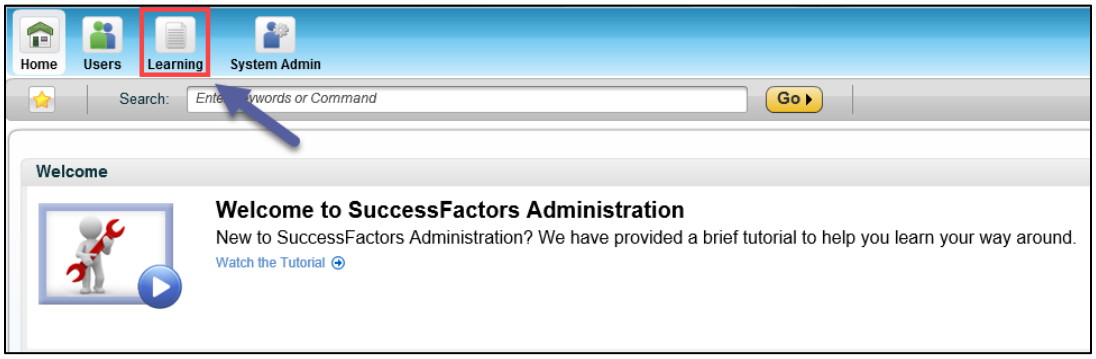
Curricula can be assigned to users using many methods:

- **via Curriculum Administration Page** - User is directly assigned the curriculum from the Curriculum Administration Page.
- **via User Needs Management** - User is directly assigned the curricula via User Needs Mgmt.
- **via User Record** - User is directly assigned the curricula from the user's LMS record.
- **via Assignment Profile** - User inherits the curricula from the associated assignment profile. The Assignment Profile Synchronization automatic process does not update curricula, competency profiles, catalogs, roles, or reviews for all users. The automatic process finds only new users: users who have moved into or out of the assignment profile since the last time it was propagated.
- **via Job Codes** - User inherits the curricula from the associated job code.

***This job aid will cover all <u>except</u> curriculum assignment via Job Codes and Assignment Profile.***

### *Via Curriculum Administration Page*

1. From the Learning Administration page (also called SuccessFactors Administration), click on the "Learning" icon.




2. Click on the Curricula tab in the left menu frame. You will be directed to the area of the system where you can search and view the Curriculum you wish to assign.

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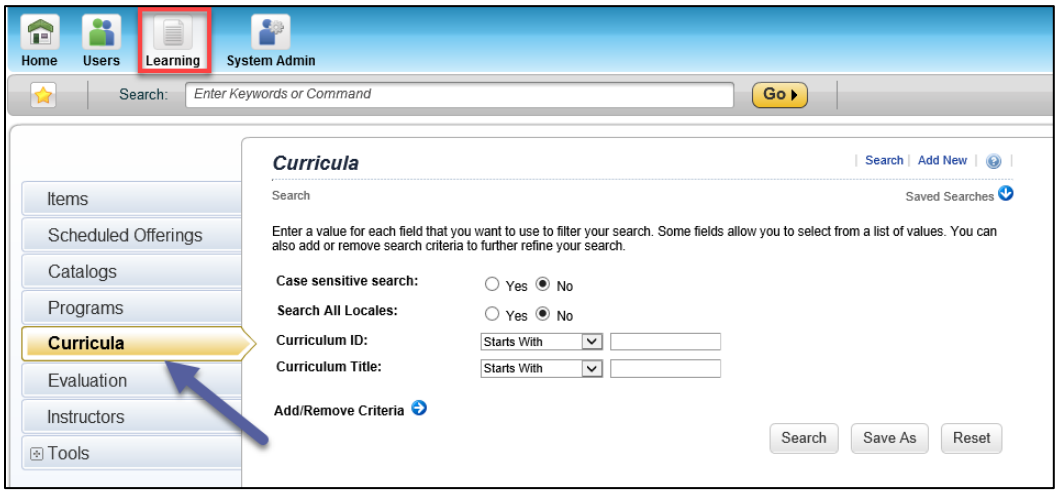
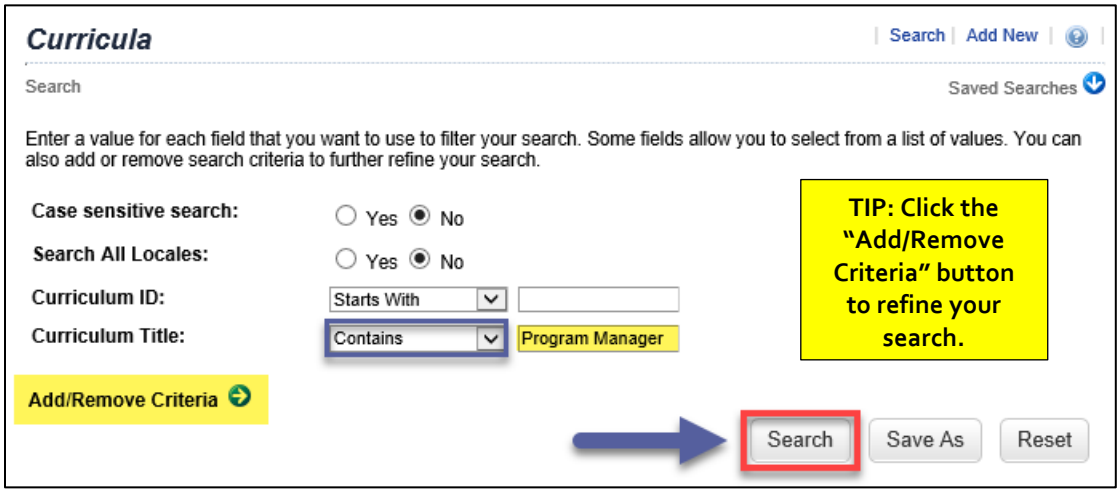
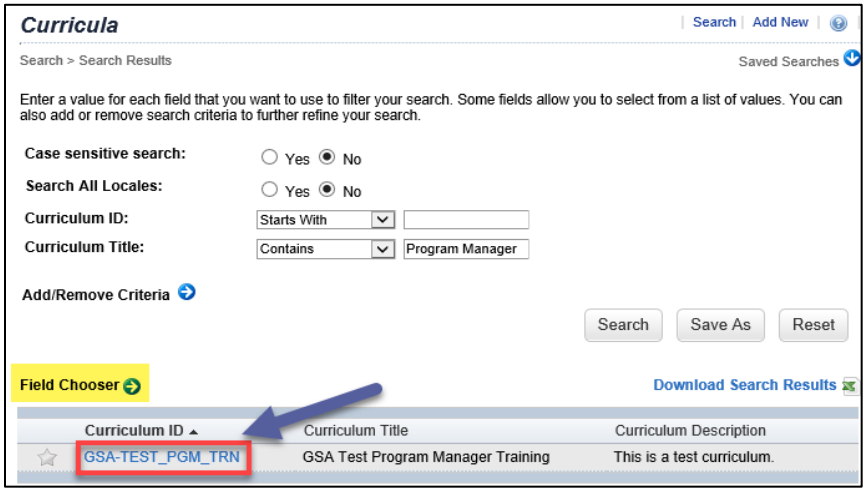
# Curricula 102 Job Aid




3. Enter the *Title* of your desired curriculum. You can use the drop-down menu associated with most criteria to refine your search (ex: "starts with" vs. "contains"). Click **Search** to search for your desired curriculum**.**




4. Locate your desired curriculum. Click on the *Curriculum ID* to select and open the curriculum.




**TIP: Click the "Field Chooser" button to refine your search results.**

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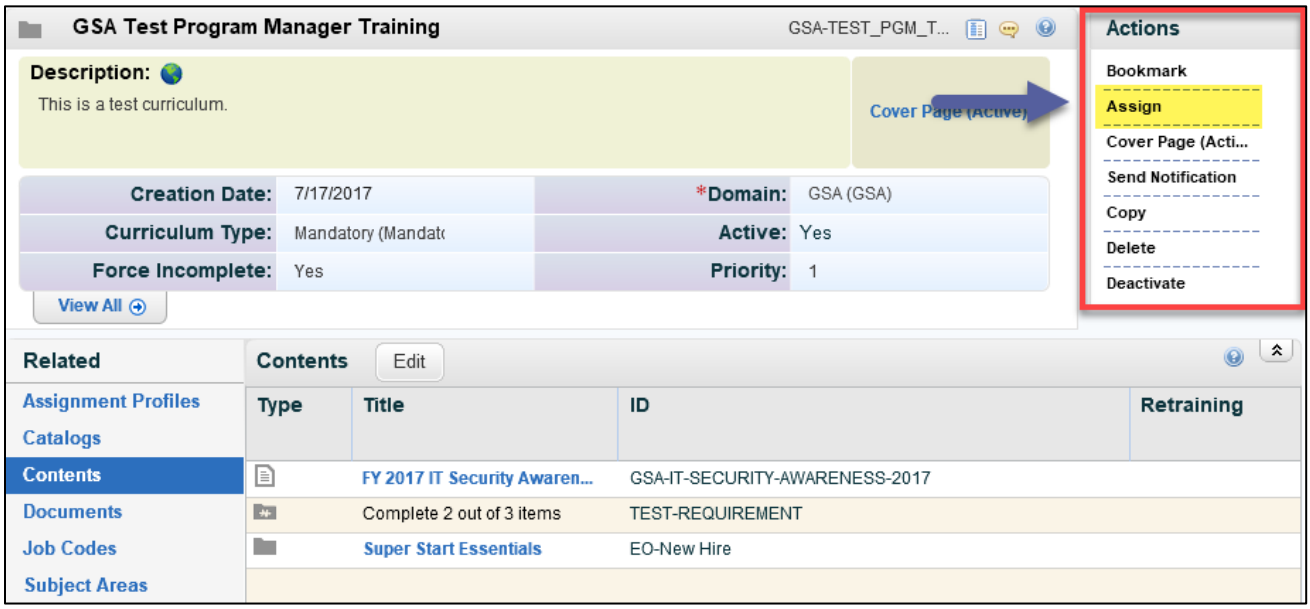
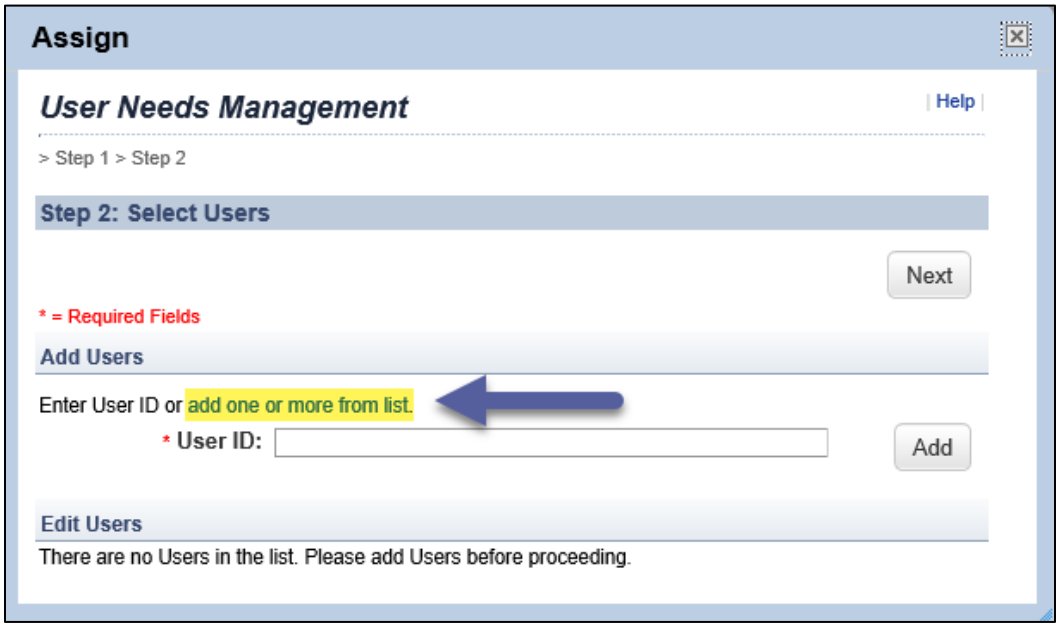
5. On the Curriculum Administration Page, locate the Actions Menu, and click **Assign** this will take you to the User Needs Management Page.




6. From the User Needs Management page, click on **add one or more from list** to find users you wish to assign the curriculum to.




7. Enter a keyword (or last name) associated with the user **<u>or leave blank</u>** to add multiple users. Click **Search** to find users.

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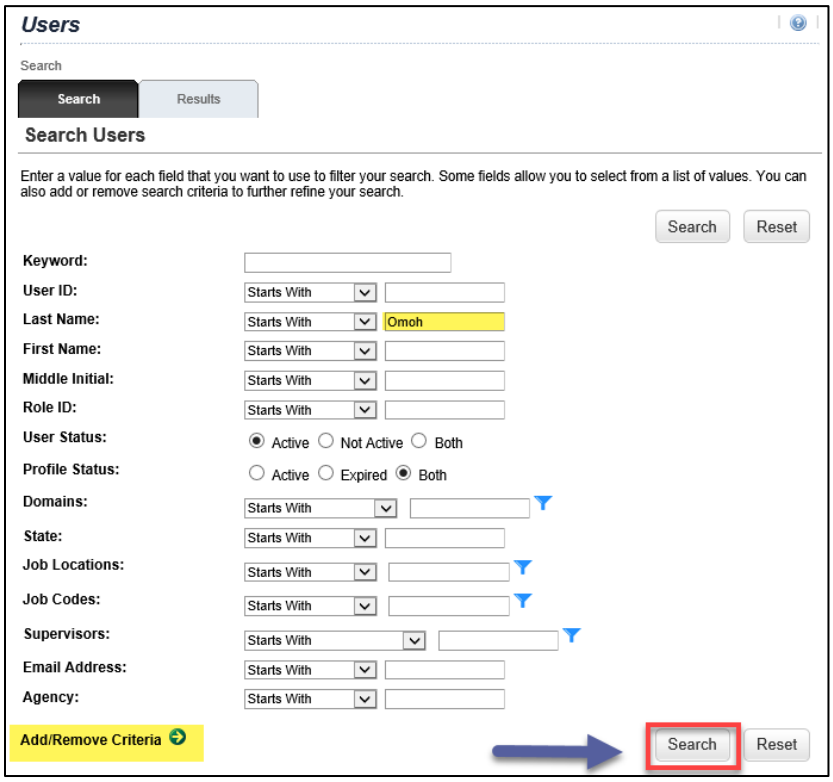
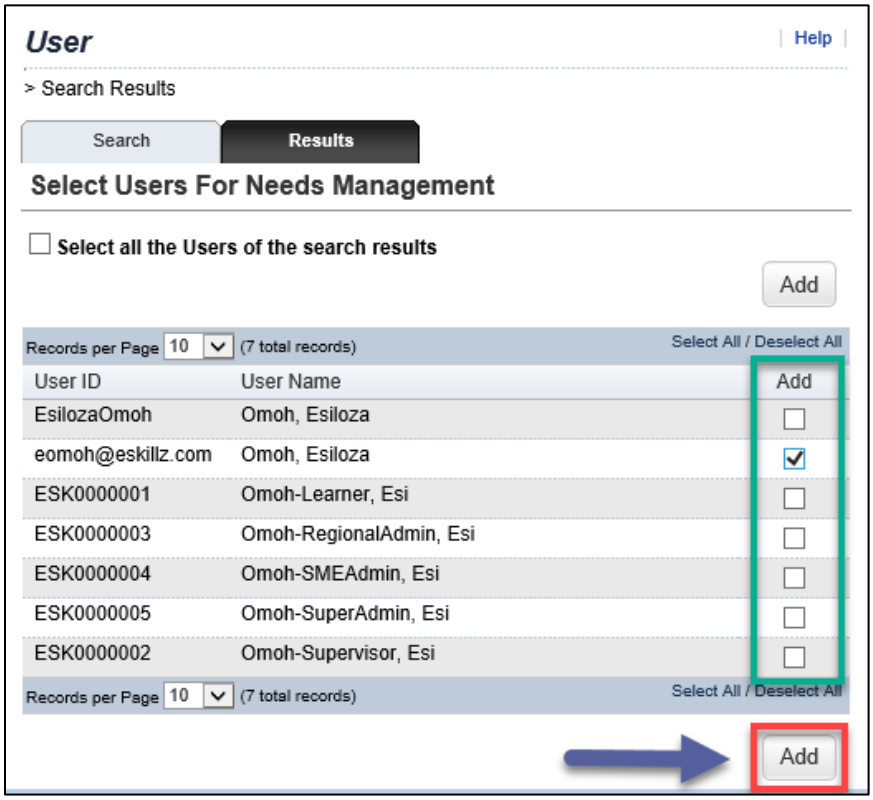



8. Select your desired user(s). Click **Add** to select the user(s) and return to the User Needs Management page.

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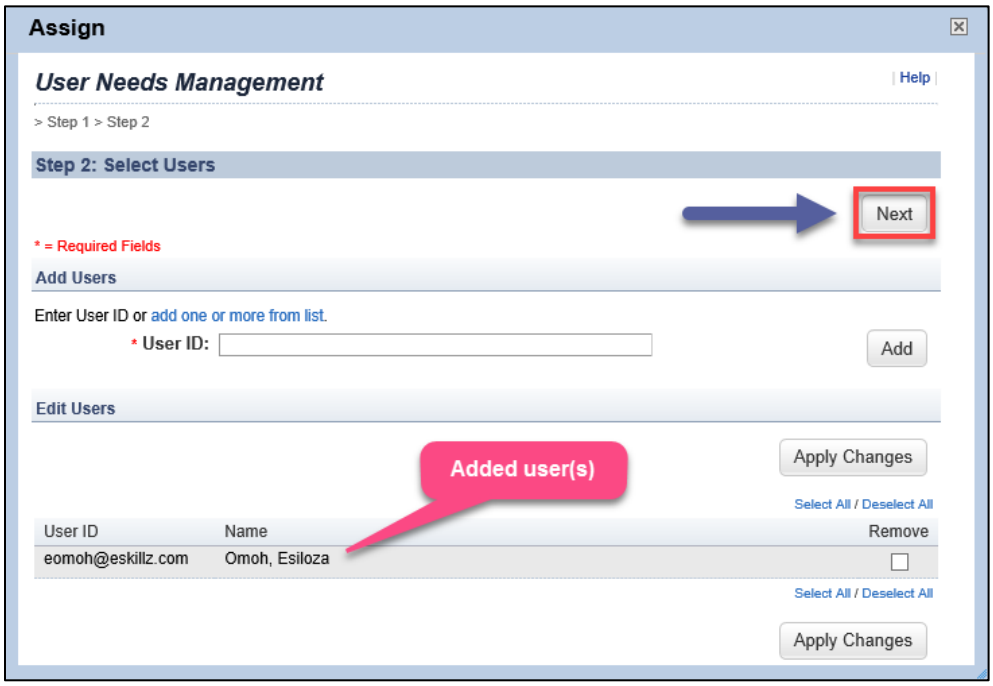
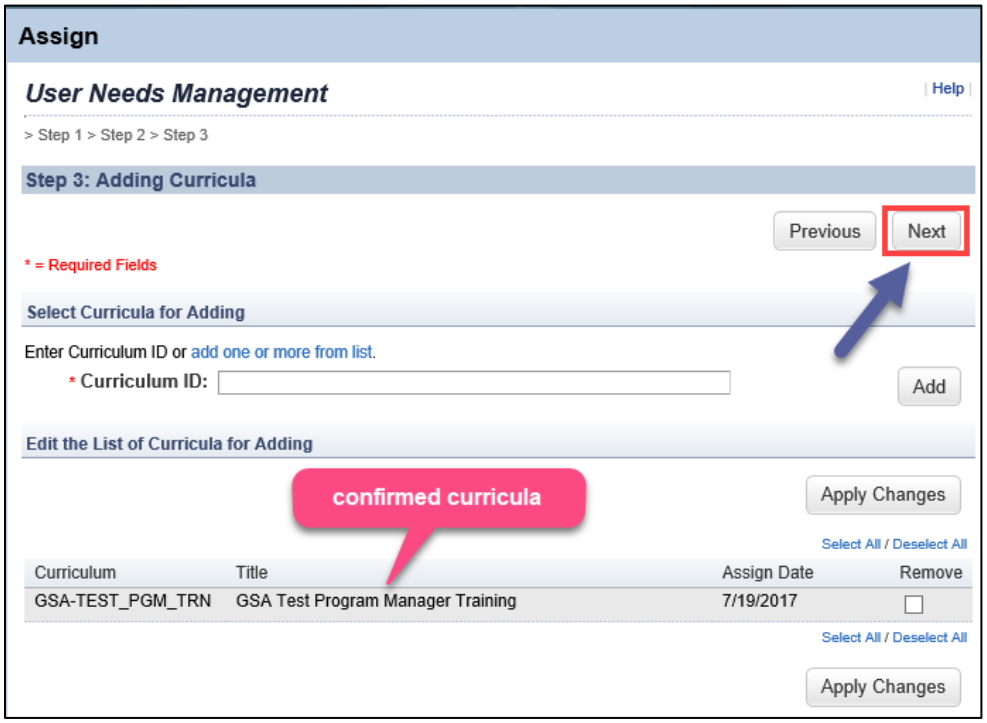
9. Repeat steps 6 – 8 to add more users. Once you have added all desired users, click **Next** to advance to the next step.




10. Confirm the curricula to be assigned. Click **Next** to advance to the next step.
***NOTE**: Click on **add one or more from list** to select more curriculum to add (if needed).

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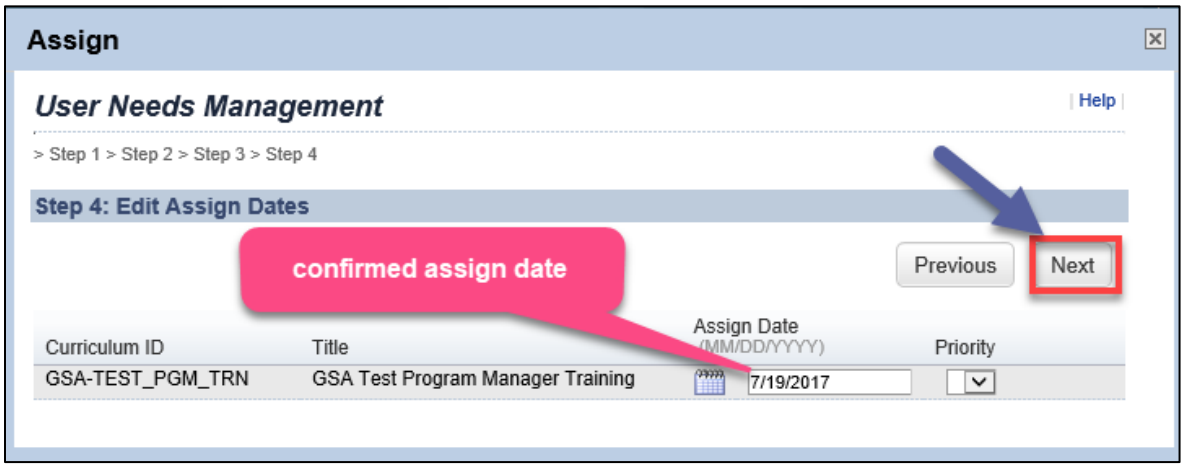
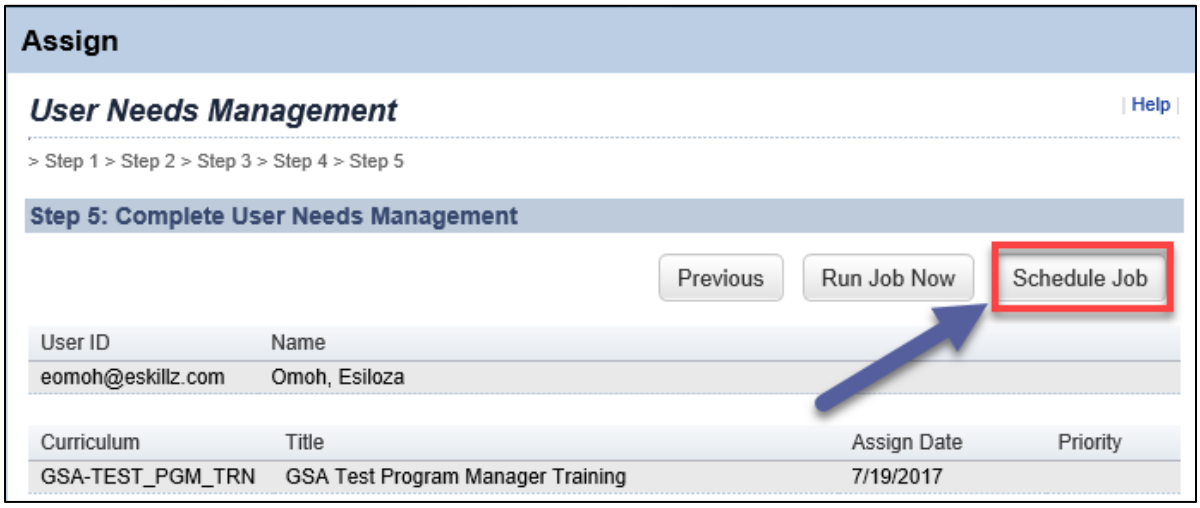
11. Edit (if needed) and confirm the curriculum assignment date for the selected users. Click **Next** to advance to the next step.




12. Click **Schedule Job**.




13. Select *Run this job immediately, if allowable*, then click **Finish** to assign the curriculum.

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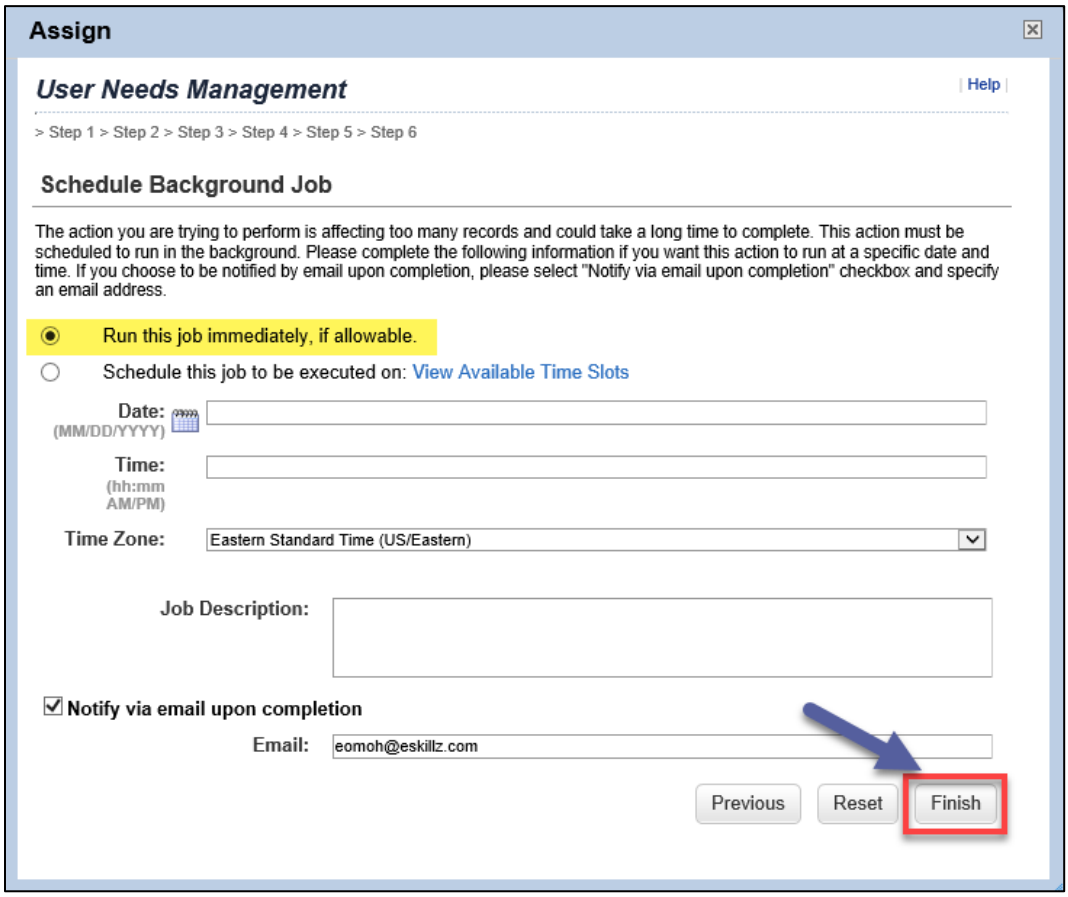
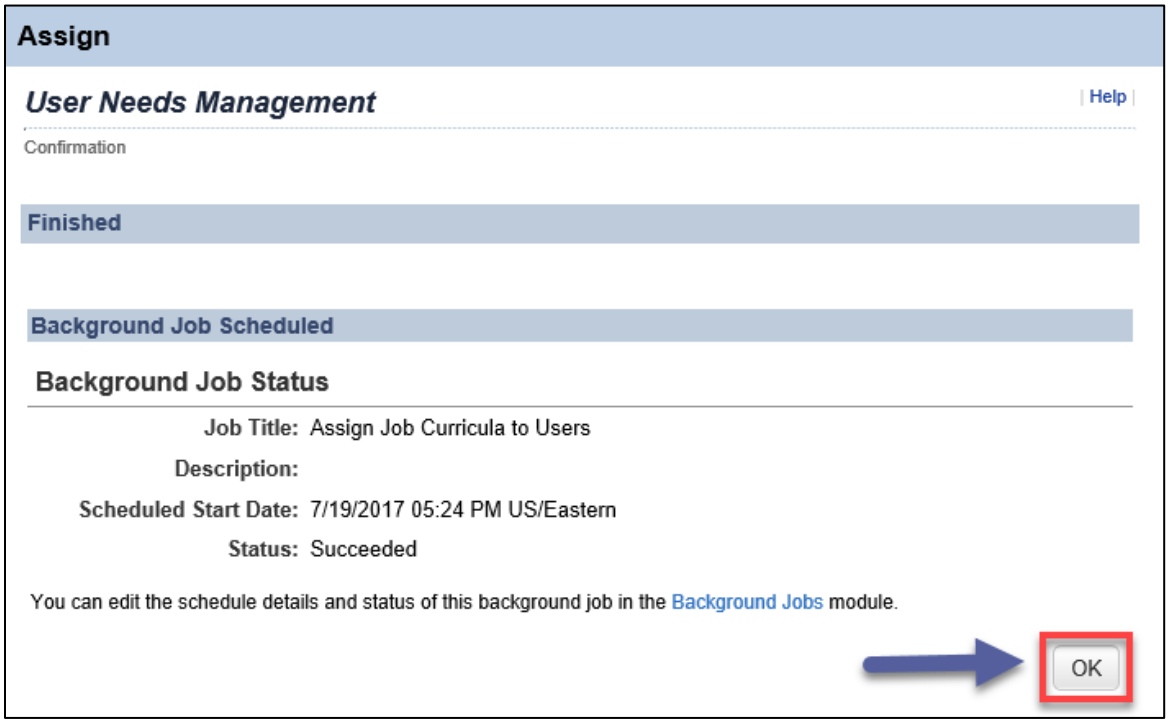



14. You have successfully assigned the curriculum! Click **OK** to return to the Curriculum Administration Page.

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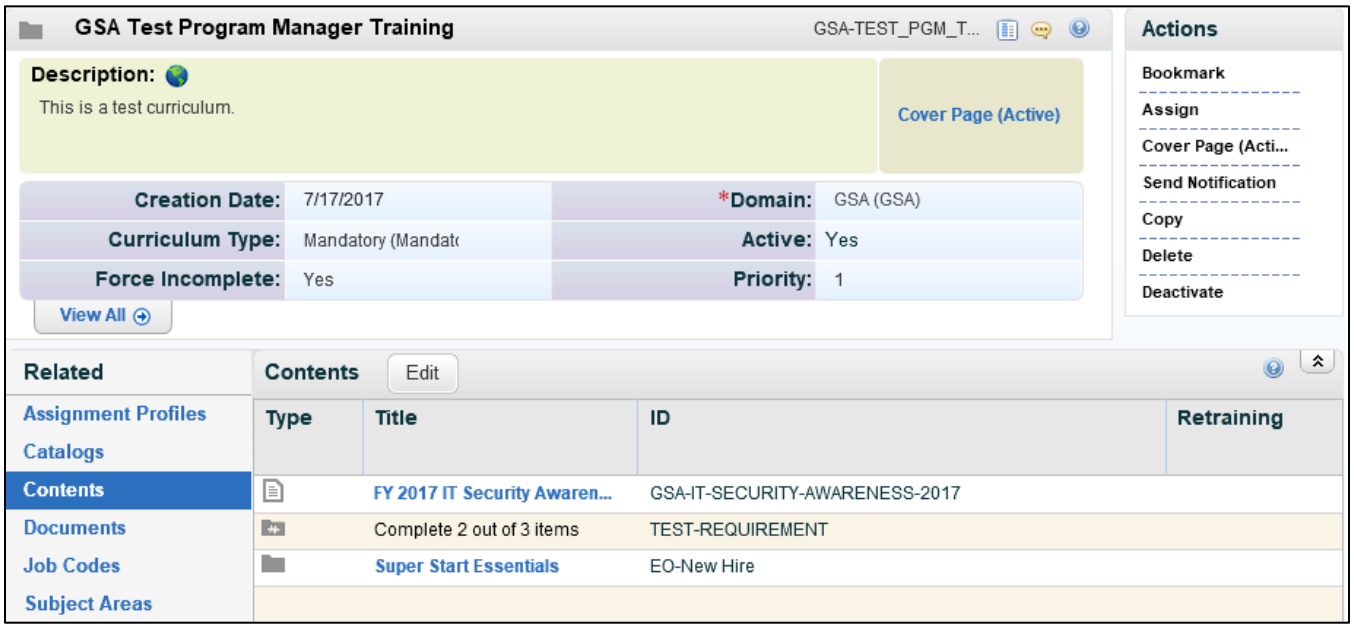
15. Once you are back to the Curriculum Administration Page, you can perform additional administrative tasks related to your curriculum or exit the page.

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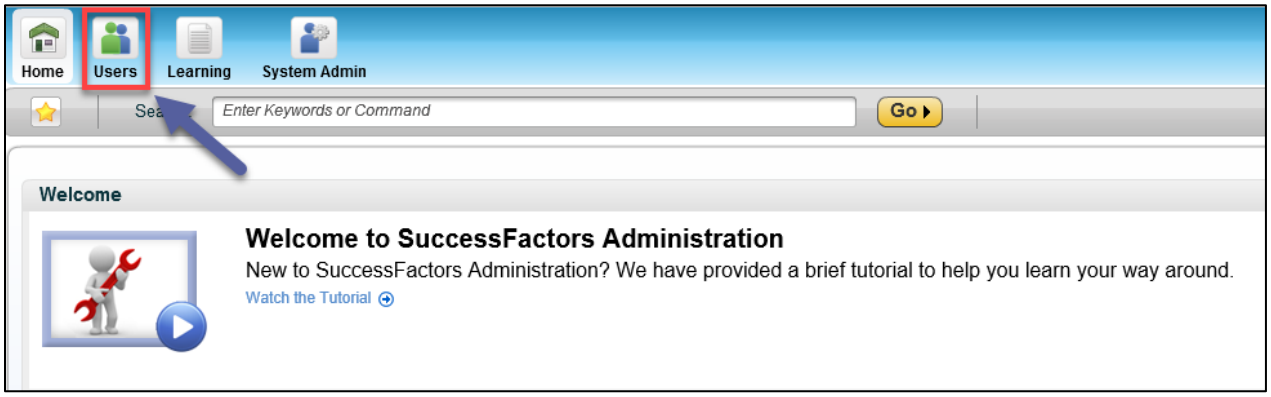
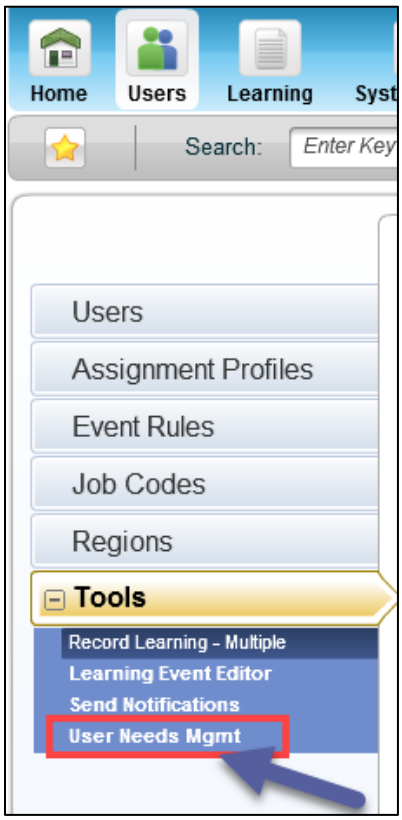
## Assign Curricula

### *Via User Needs Management*

1. From the Learning Administration page (also called SuccessFactors Administration), click on the "Users" icon.




2. Click on **Tools** in the left menu frame to expand the tab, then click on **User Needs Mgmt**.

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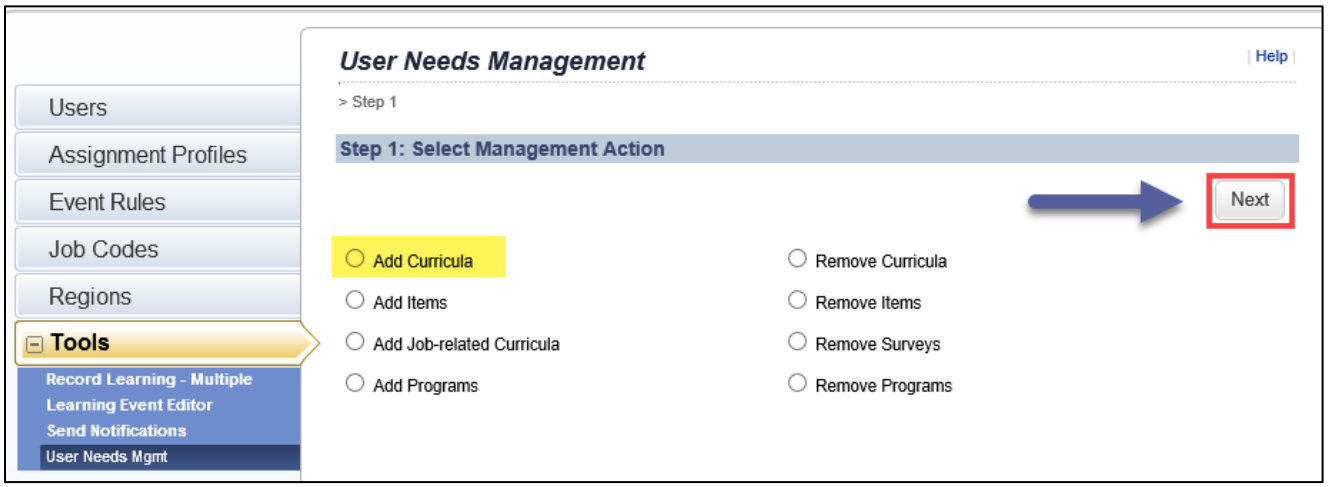
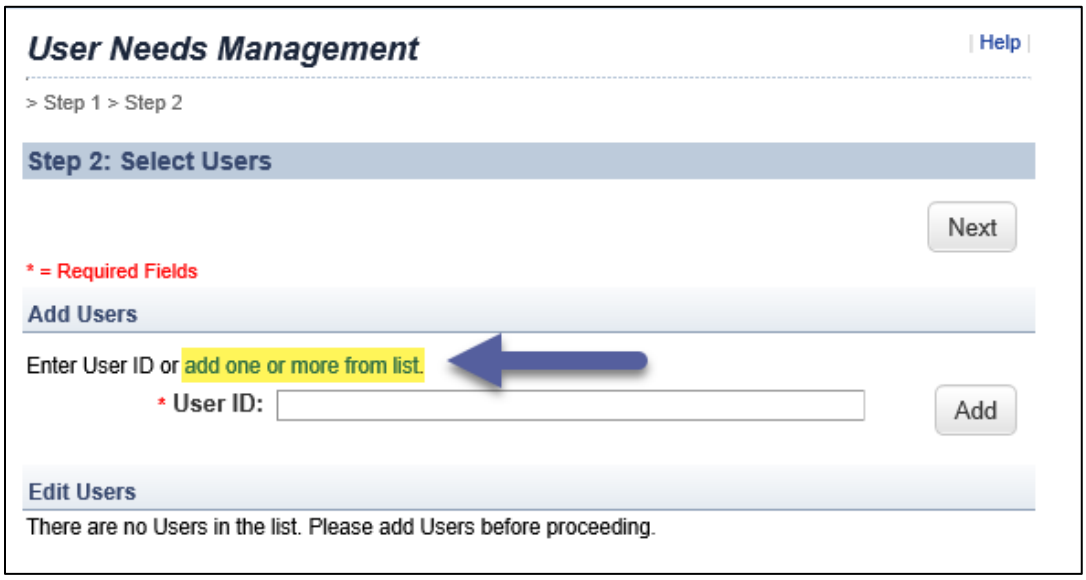
3. On the User Needs Management Page, select *Add Curricula* as the management action you want to perform. Click **Next** to advance to the next step.




4. Click on **add one or more from list** to find users you wish to assign the curriculum to.




5. Enter a keyword (or last name) associated with the user **<u>or leave blank</u>** to add multiple users. Click **Search** to find users.

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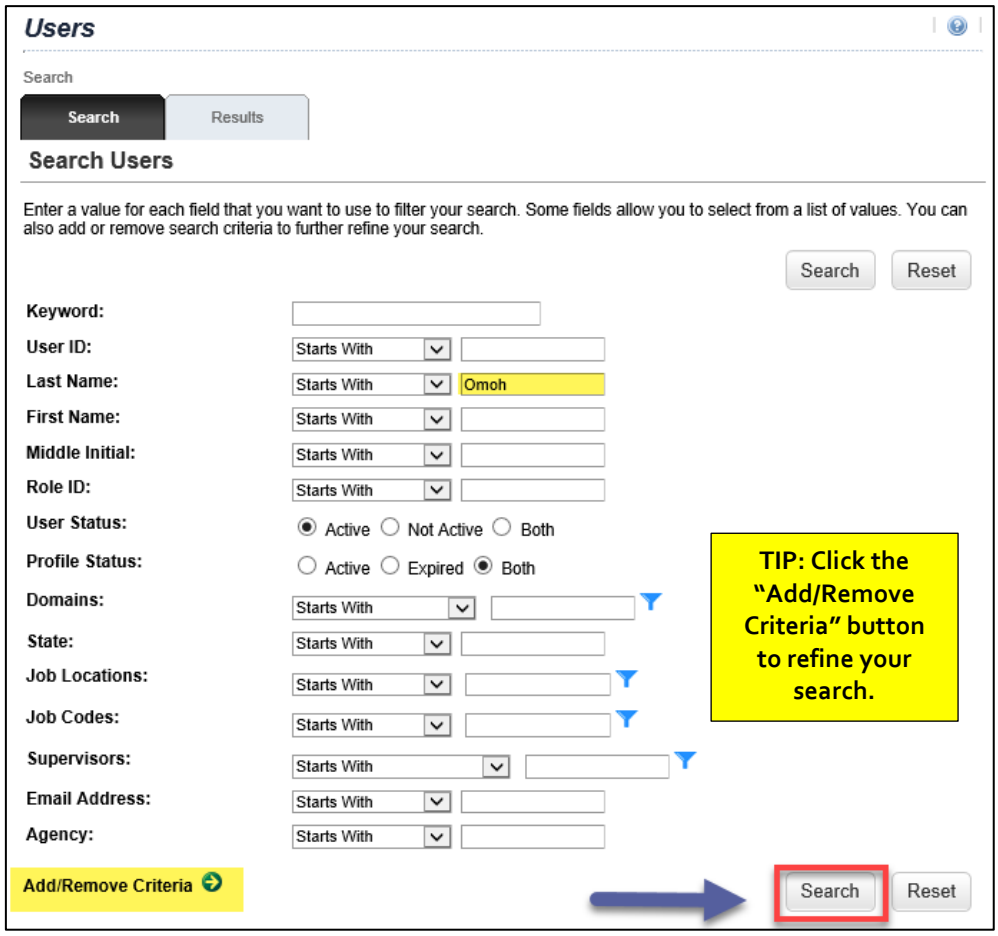
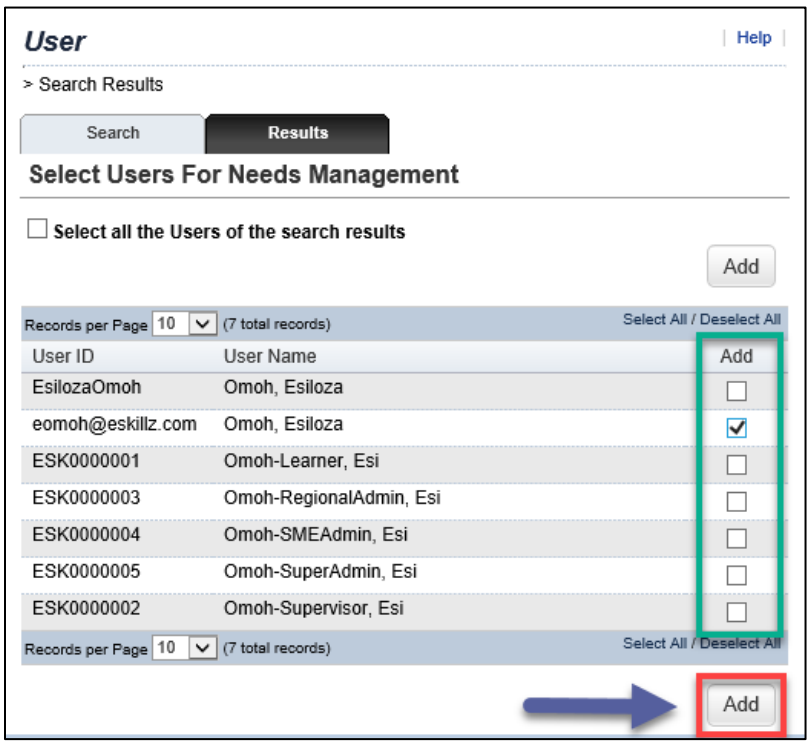



6. Select your desired user(s). Click **Add** to select the user(s) and return to the User Needs Management page.

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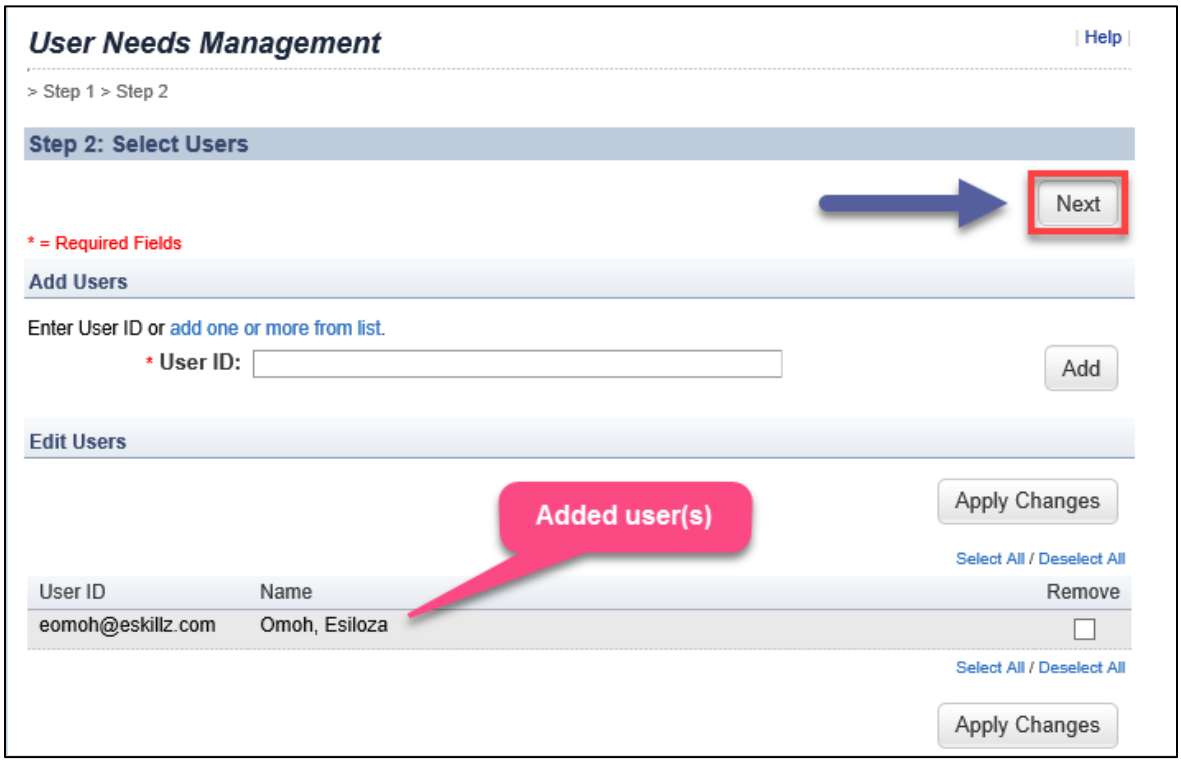
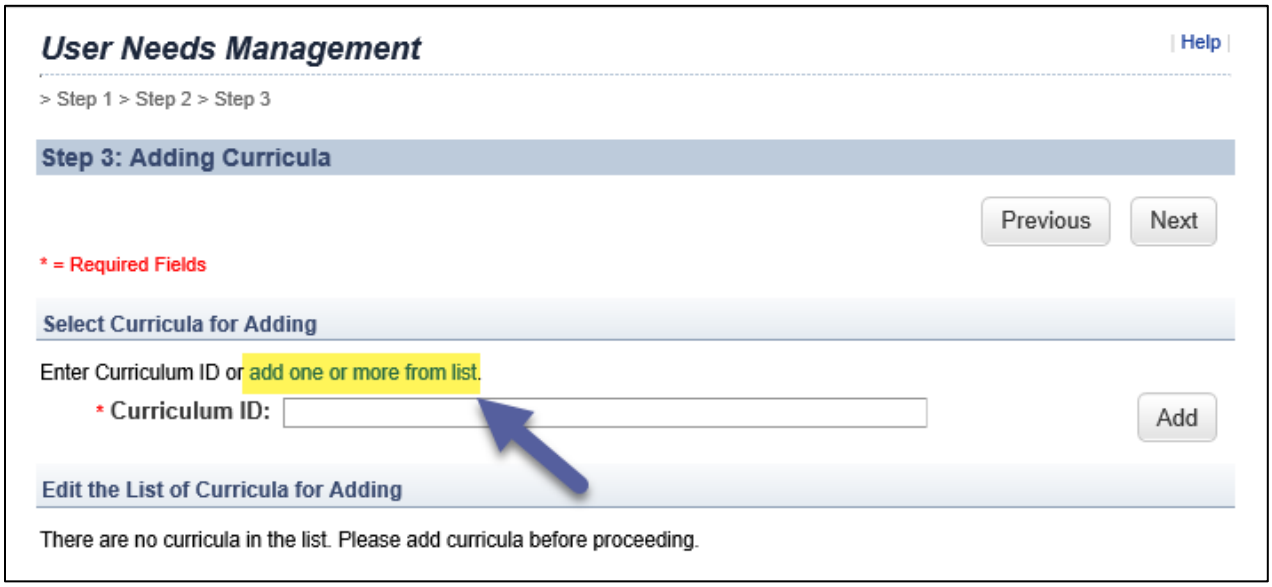
7. Repeat steps 4 – 6 to add more users (if needed). Once you have added all desired users, click **Next** to advance to the next step.




8. Click on **add one or more from list** to select your desired curricula to assign.

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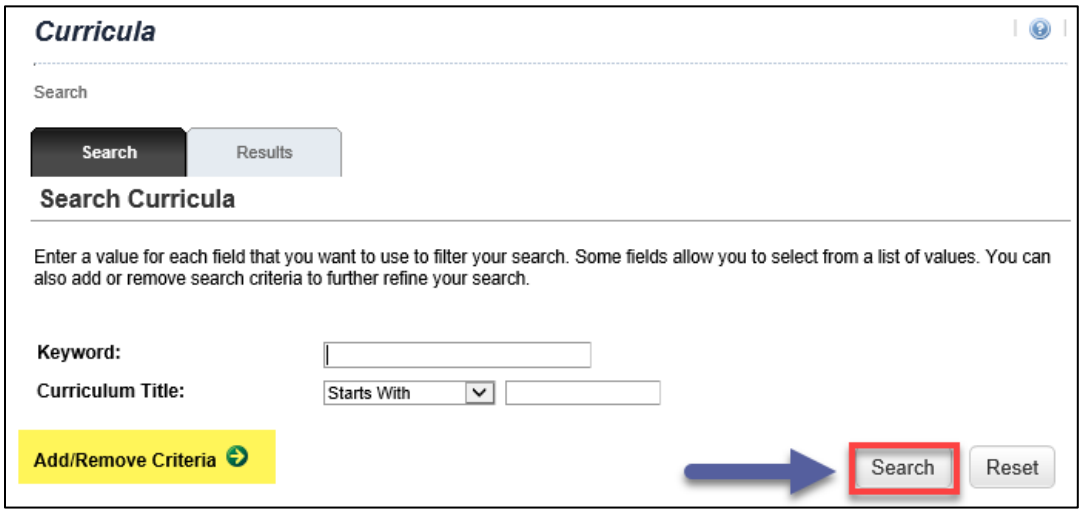
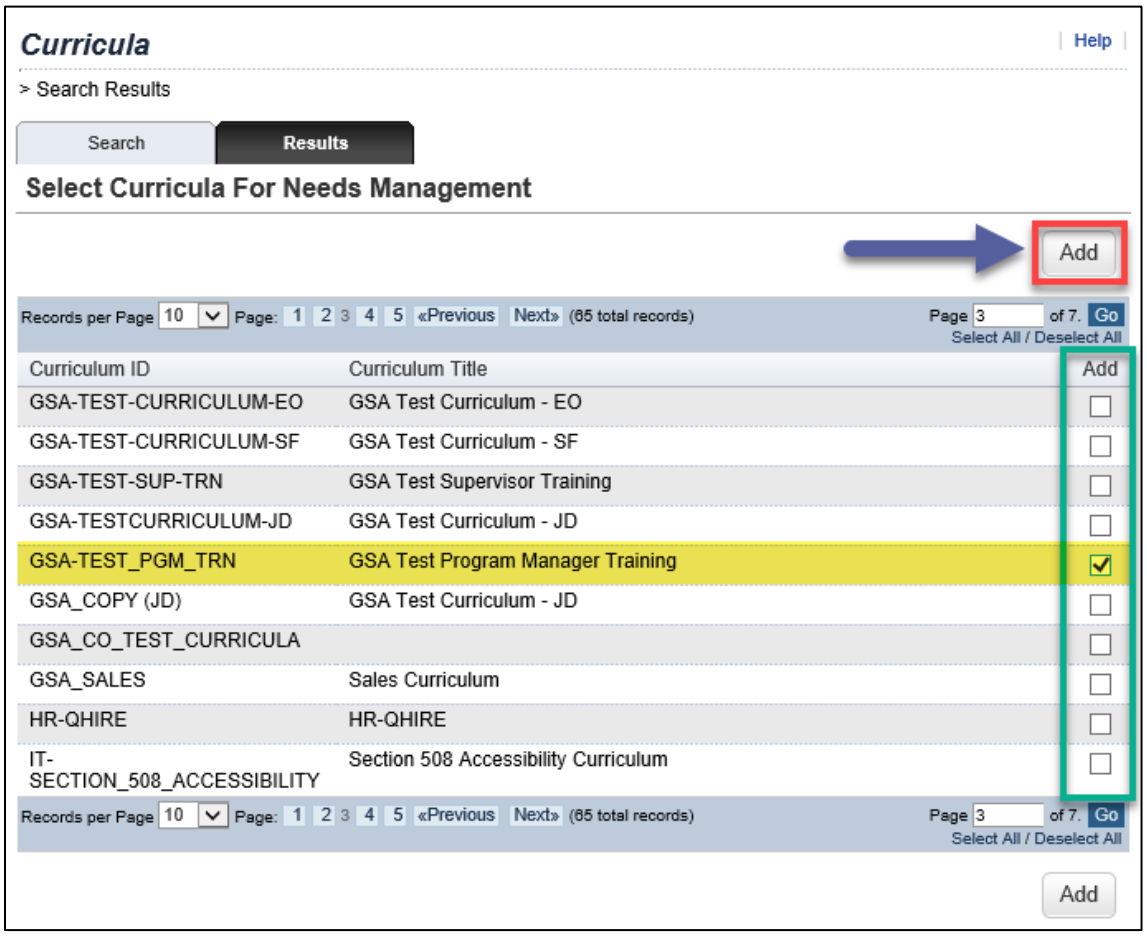
9. Enter a keyword associated with the curriculum **<u>or leave blank</u>** to search all curricula in the system. Click **Search** to find your desired curriculum.




10. Select your desired curricula. Click **Add** to select the curriculum and return to the User Needs Management page.

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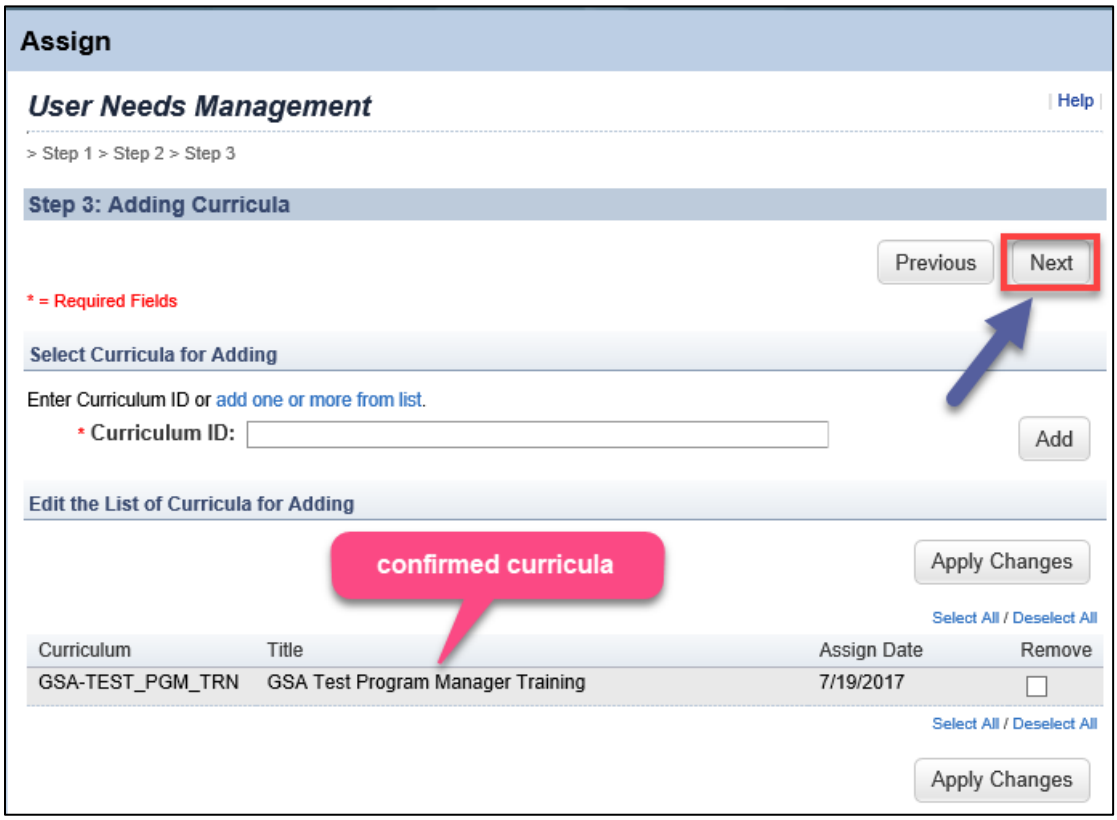
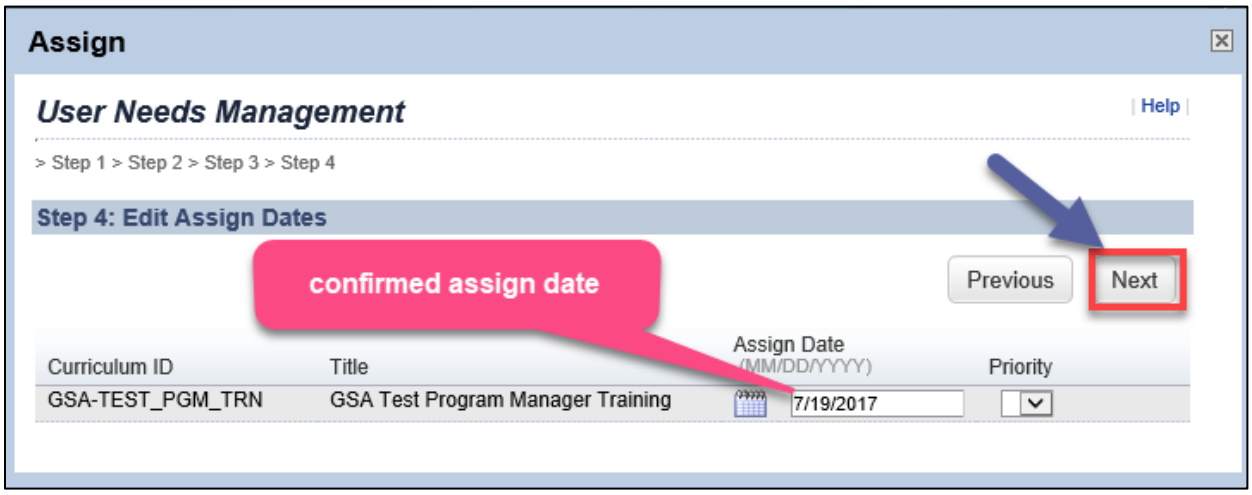
11. Repeat steps 8 – 10 to add more curricula (if needed). Confirm the curricula to be assigned. Click **Next** to advance to the next step.




12. Edit (if needed) and confirm the curriculum assignment date for the selected users. Click **Next** to advance to the next step.

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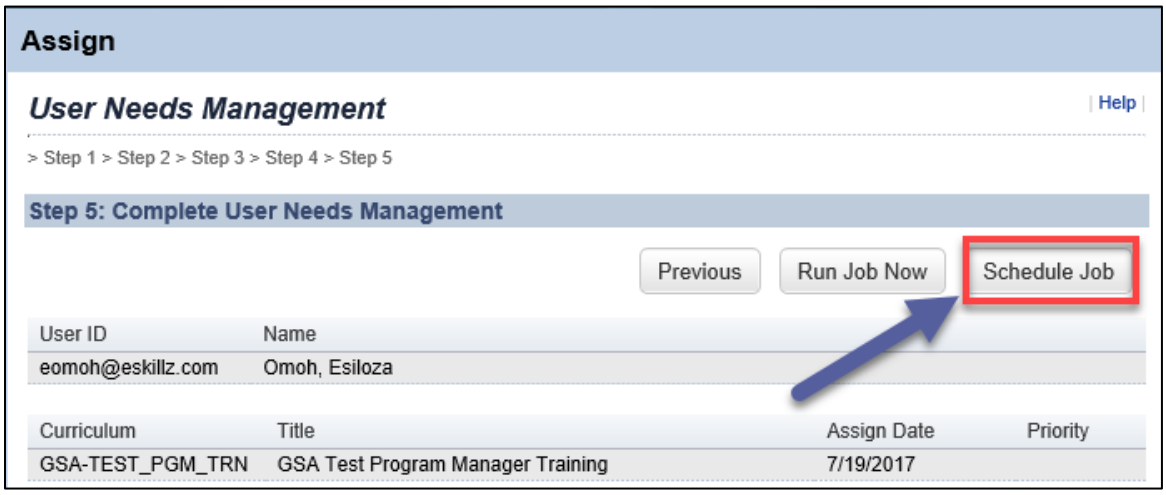
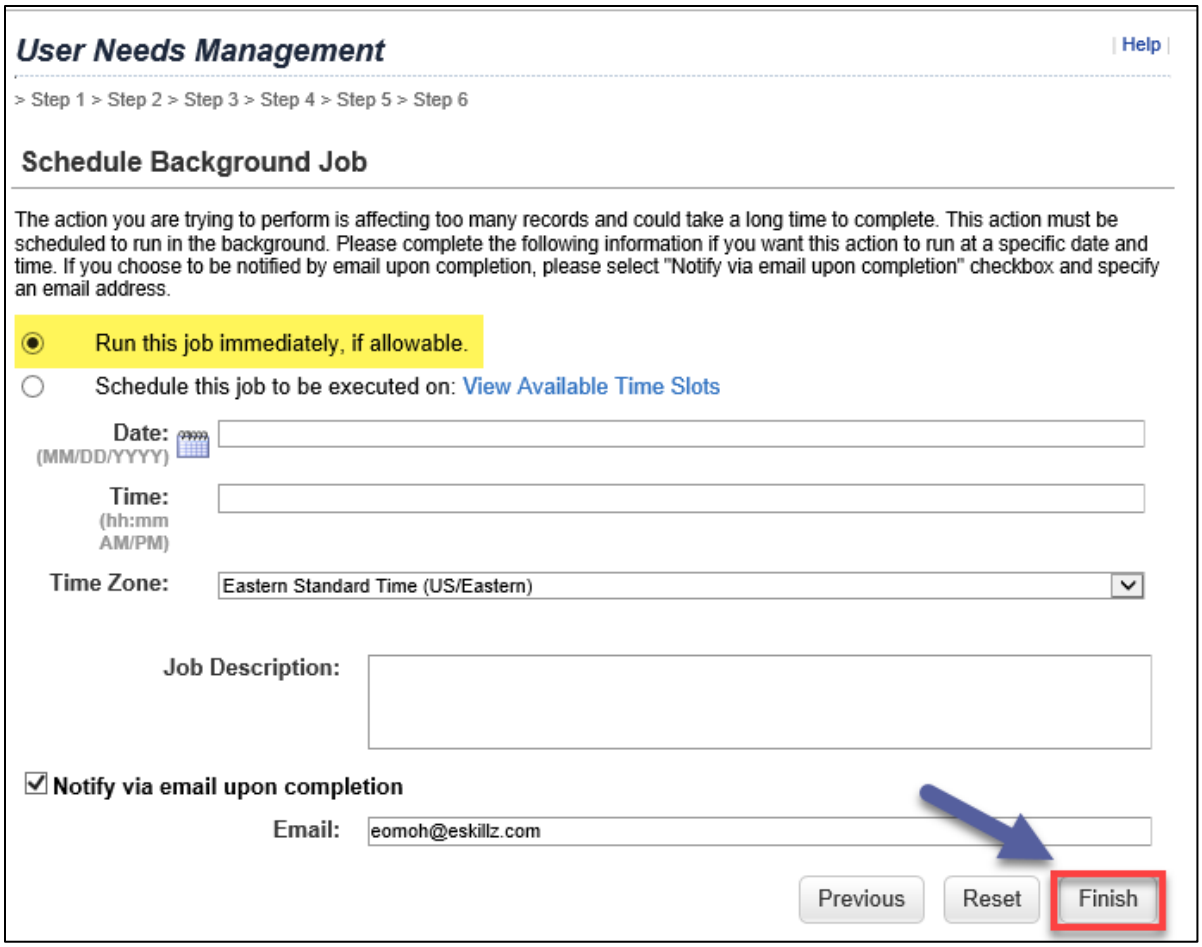
13. Click **Schedule Job**.




14. Select *Run this job immediately, if allowable*. Click **Finish** to assign the curriculum.

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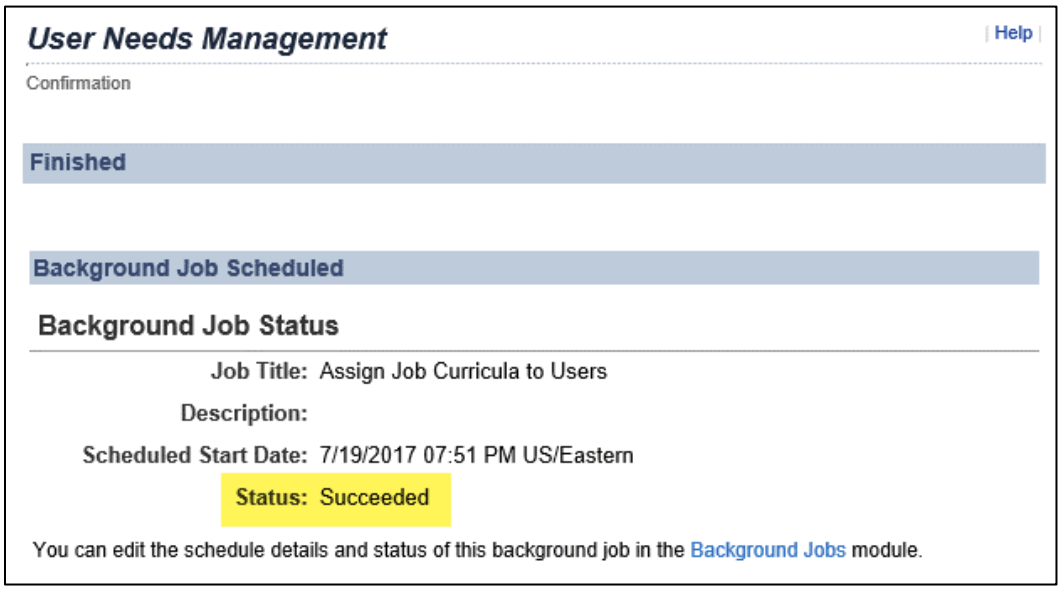
15. You have successfully assigned the curriculum!

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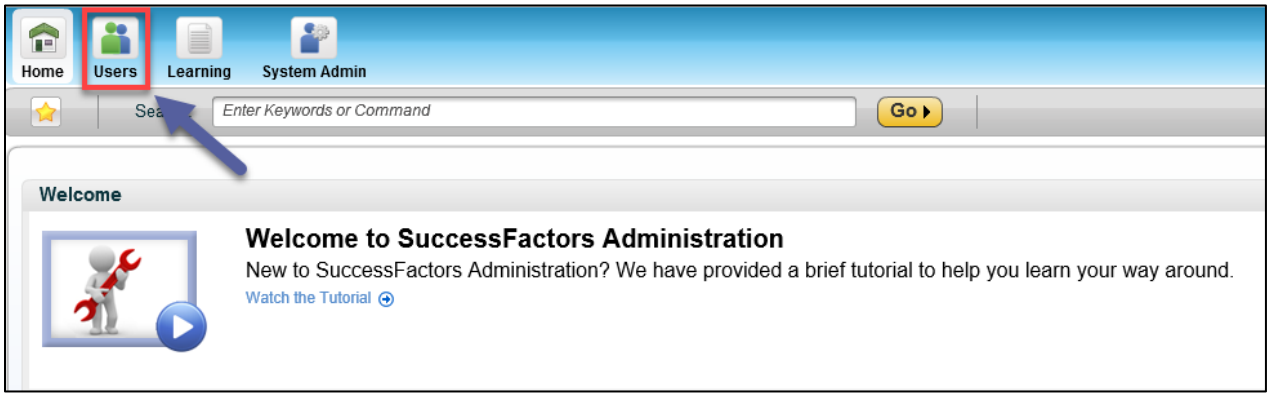
## Assign Curricula

### *Via User Record*

1. From the Learning Administration page (also called SuccessFactors Administration), click on the "Users" icon.




2. Click on **Users** in the left menu frame.

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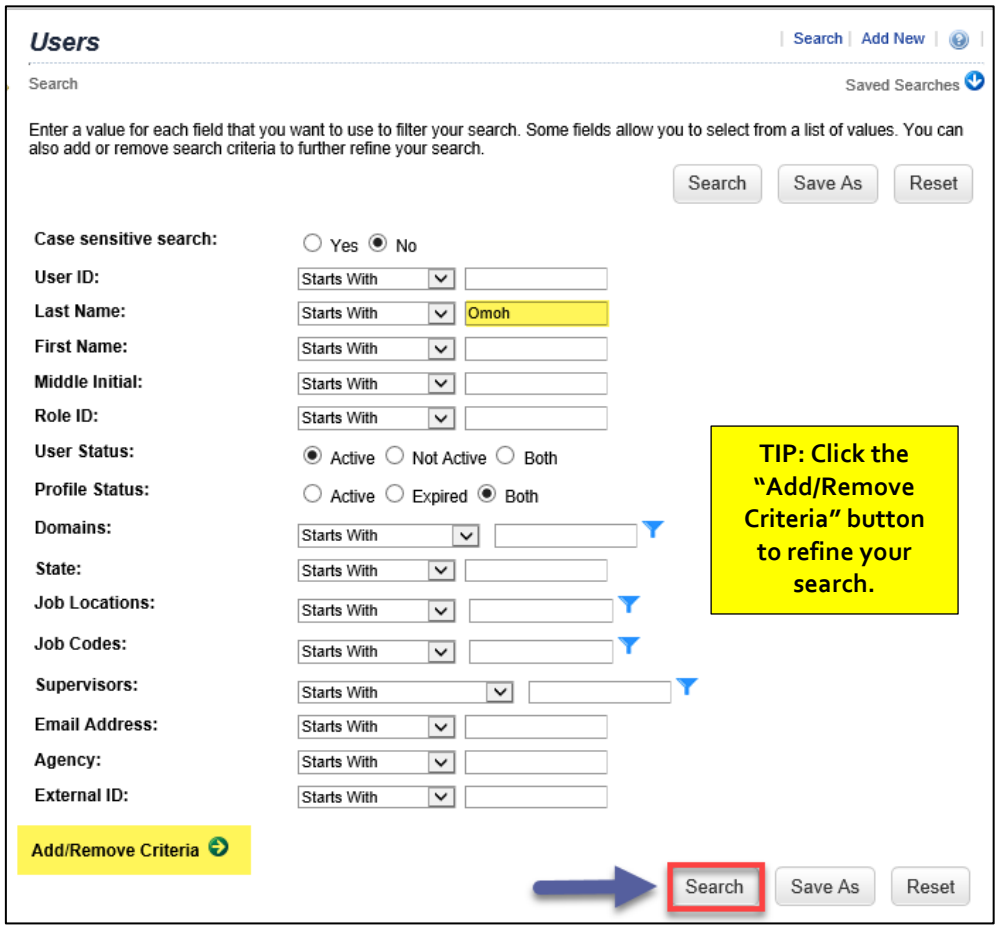
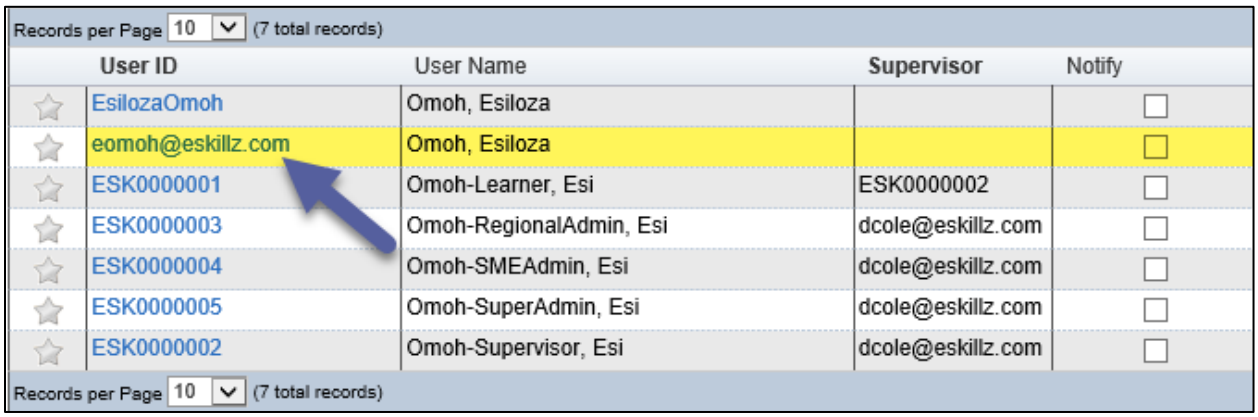
3. Enter a keyword (or last name) associated with the user **<u>or leave blank</u>** to search for all users. Click **Search** to find your desired user.




4. Click on your desired user's **User ID** to open the record.

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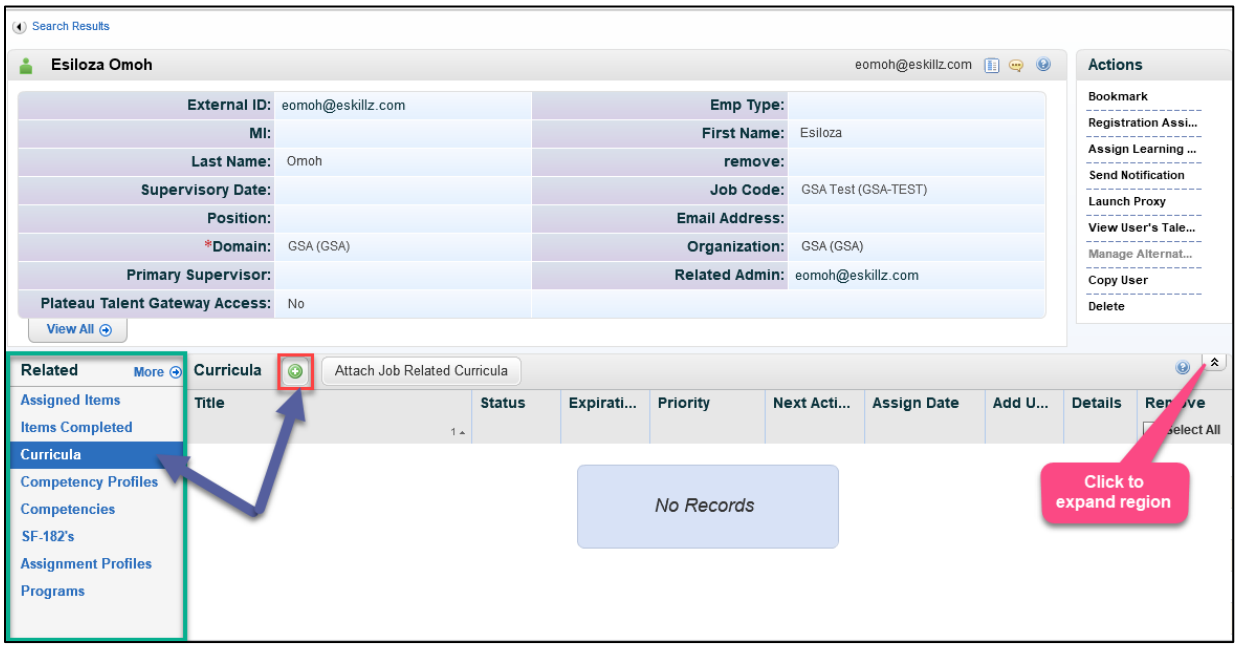
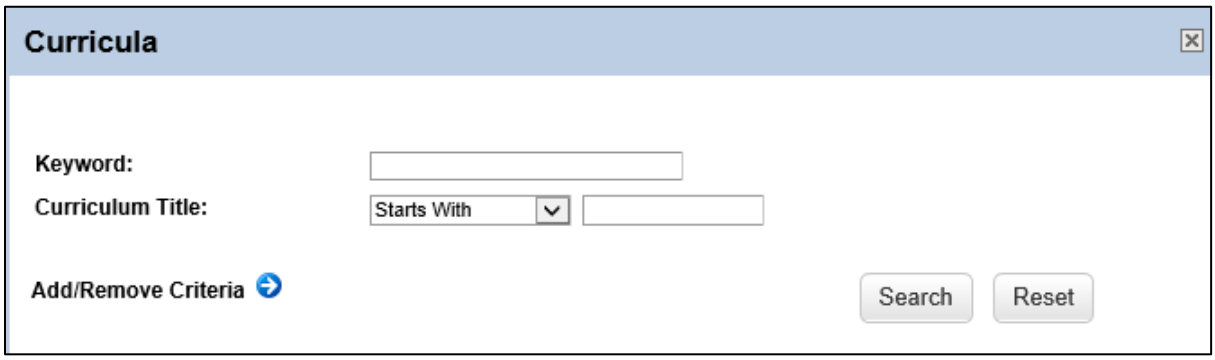
5. In the user's record, locate the Related Menu and click on **Curricula**. Click on the icon to assign curricula. For better viewing, click on the icon to expand the region.




6. Enter the keyword associated with the curriculum you wish to add or leave the field blank to pull a list of all curricula available in the system. Click **Search**.




7. Select your desired curriculum, edit the assign date (if needed), and click **Add**.

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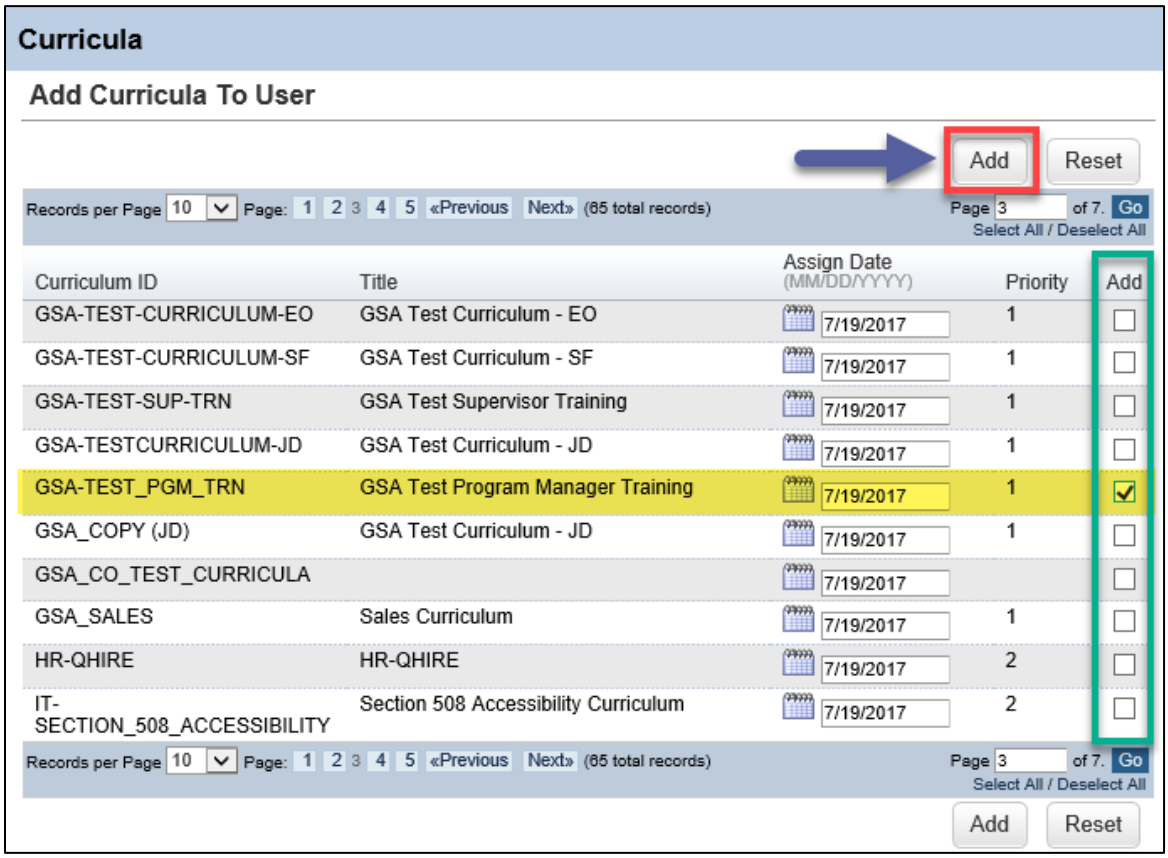
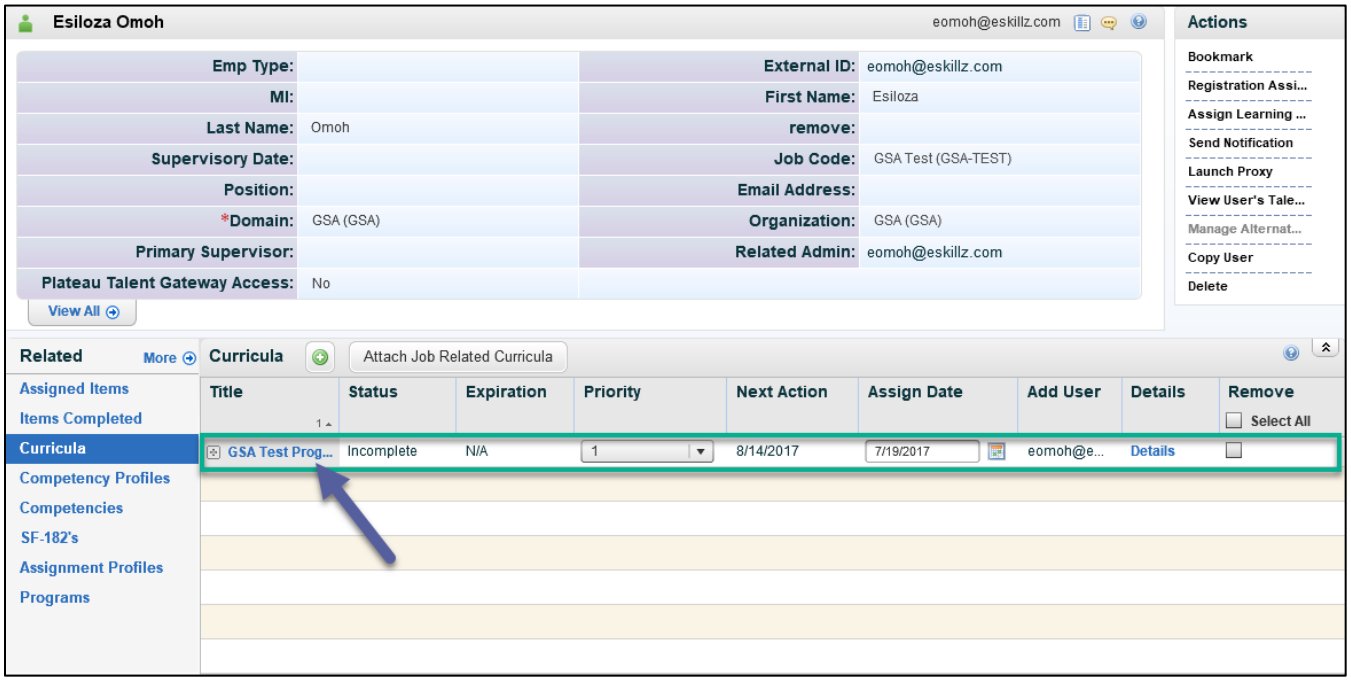



8. You have successfully added your curriculum!

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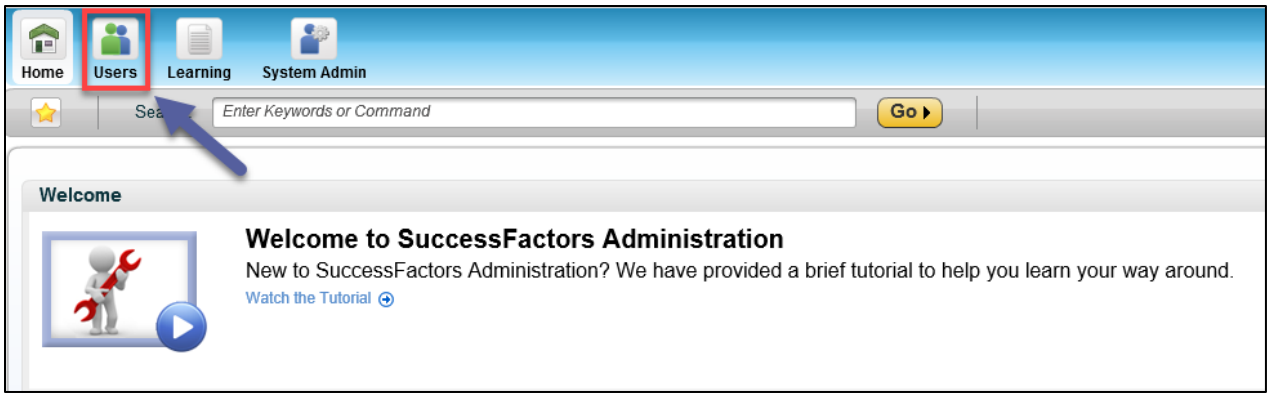
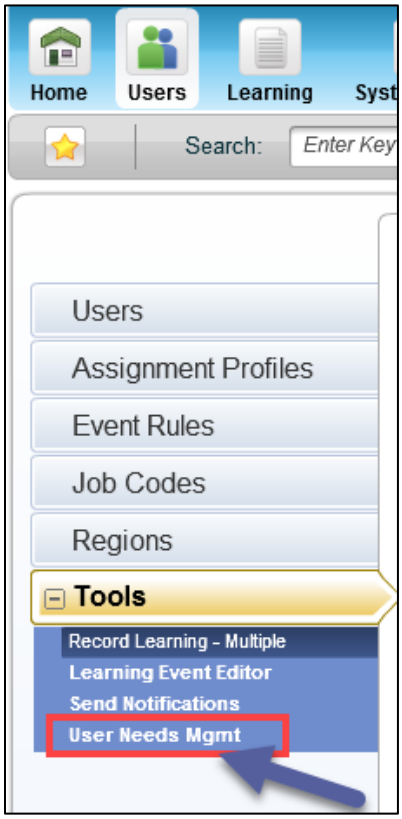
## Remove Curricula

### *Via User Needs Management*

1. From the Learning Administration page (also called SuccessFactors Administration), click on the "Users" icon.




2. Click on **Tools** in the left menu frame to expand the tab, then click on **User Needs Mgmt**.

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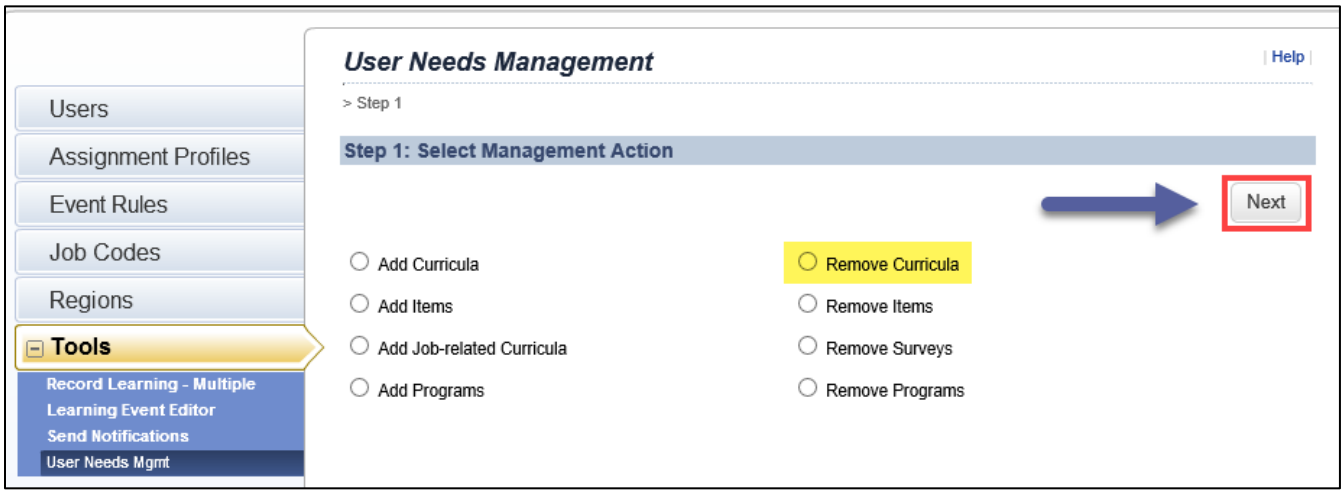
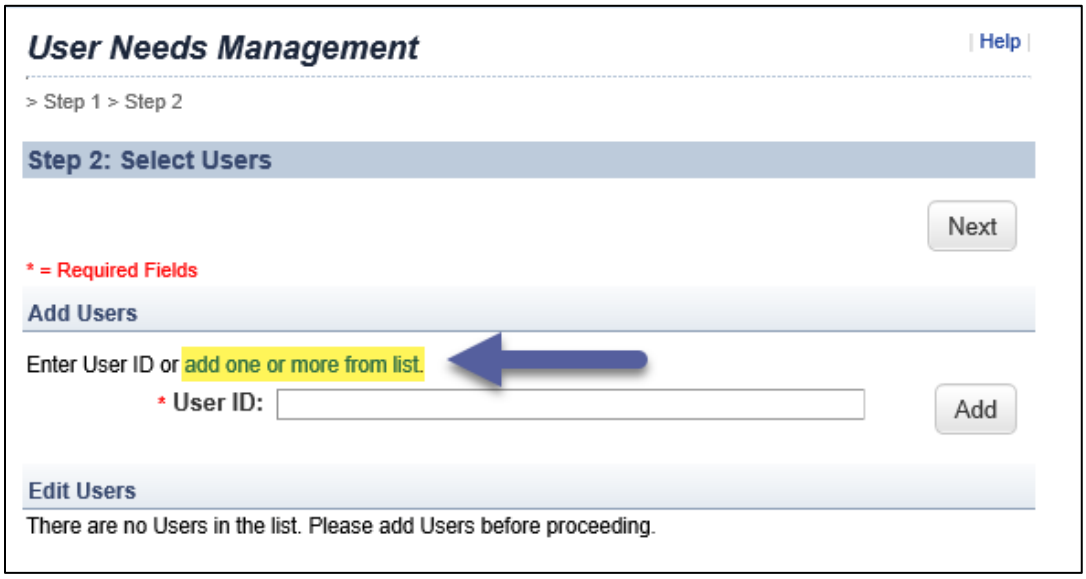
3. On the User Needs Management Page, select *Remove Curricula* as the management action you want to perform. Click **Next** to advance to the next step.




4. Click on **add one or more from list** to find users you wish to remove from a curriculum.




5. Enter a keyword (or last name) associated with the user **<u>or leave blank</u>** to add multiple users. Click **Search** to find users.

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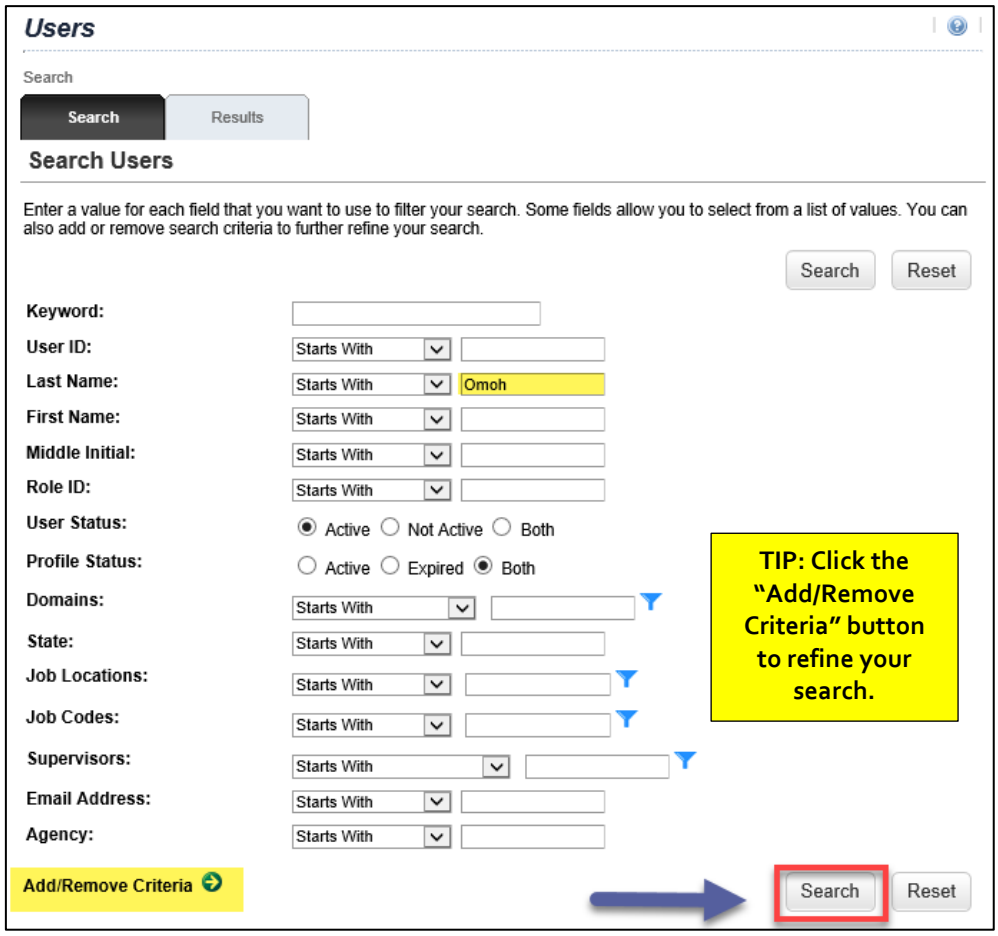
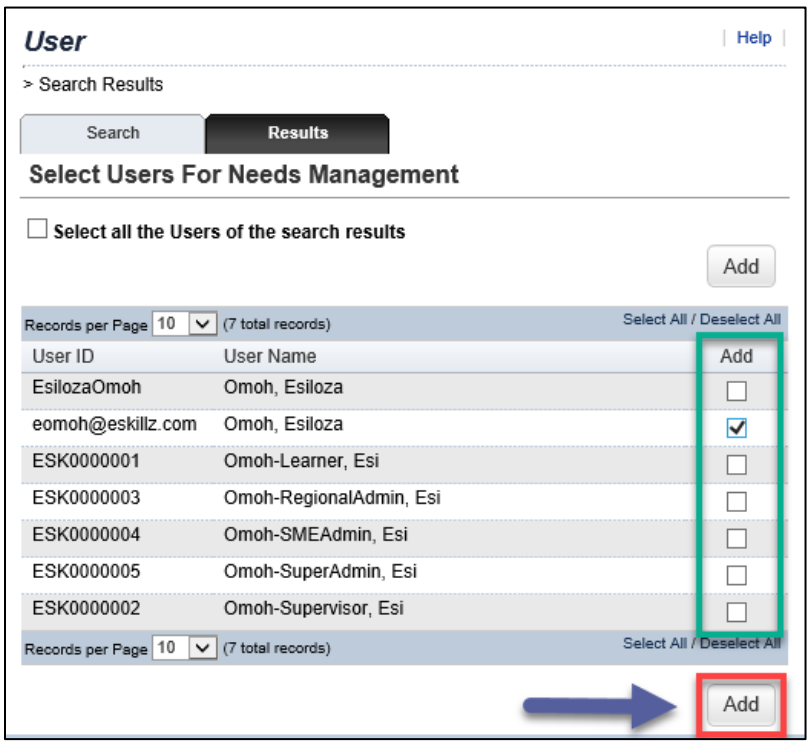



6. Select your desired user(s). Click **Add** to select the user(s) and return to the User Needs Management page.

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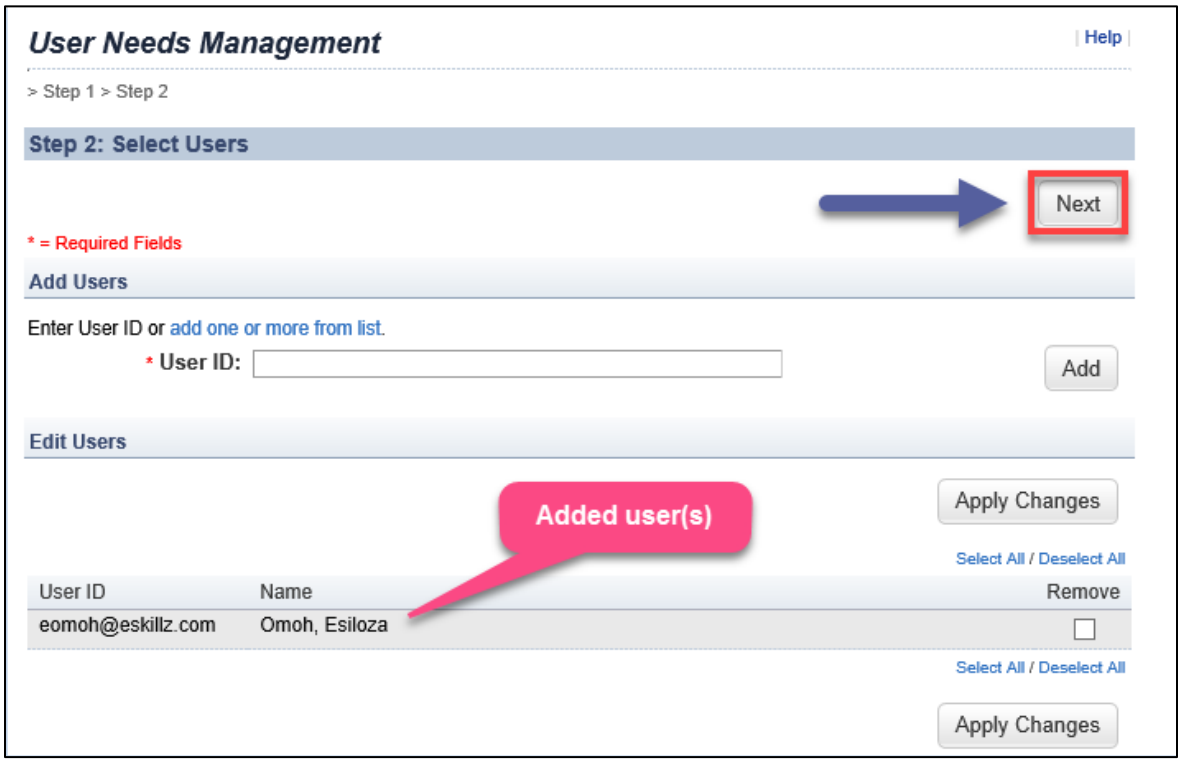
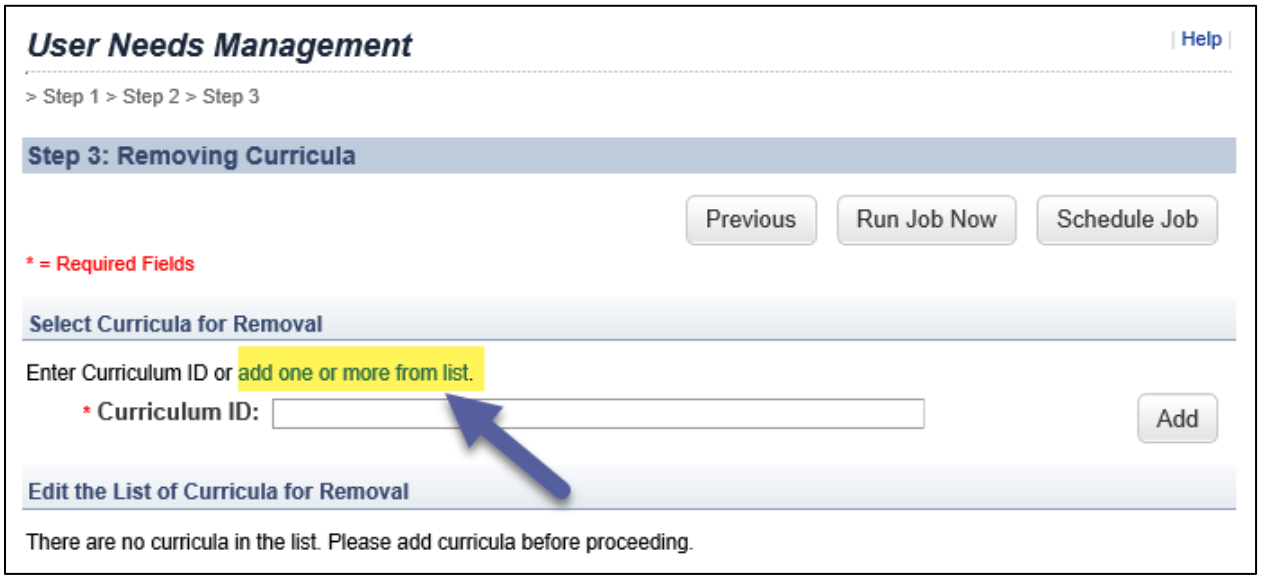
7. Repeat steps 4 – 6 to add more users (if needed). Once you have added all desired users, click **Next** to advance to the next step.




8. Click on **add one or more from list** to select your desired curriculum to remove.

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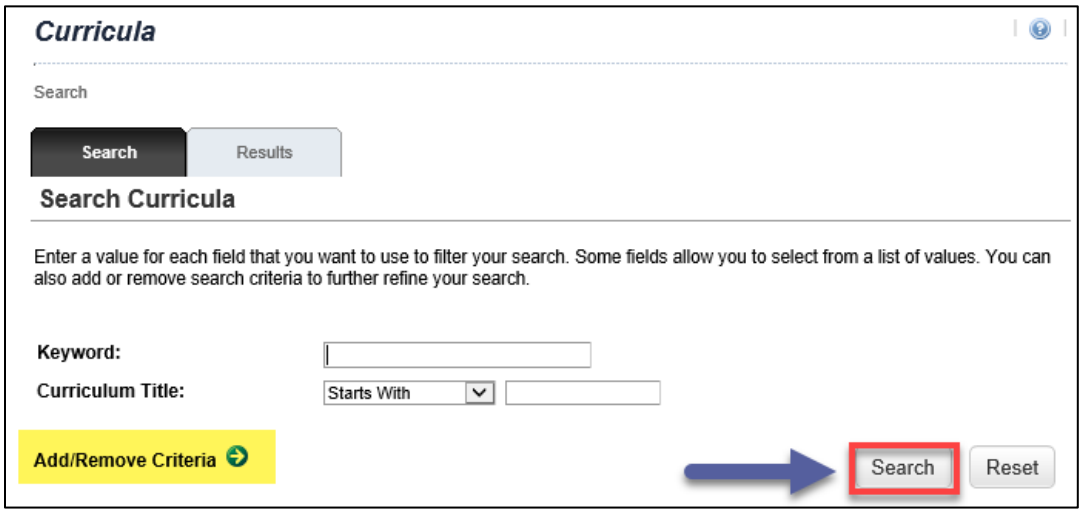
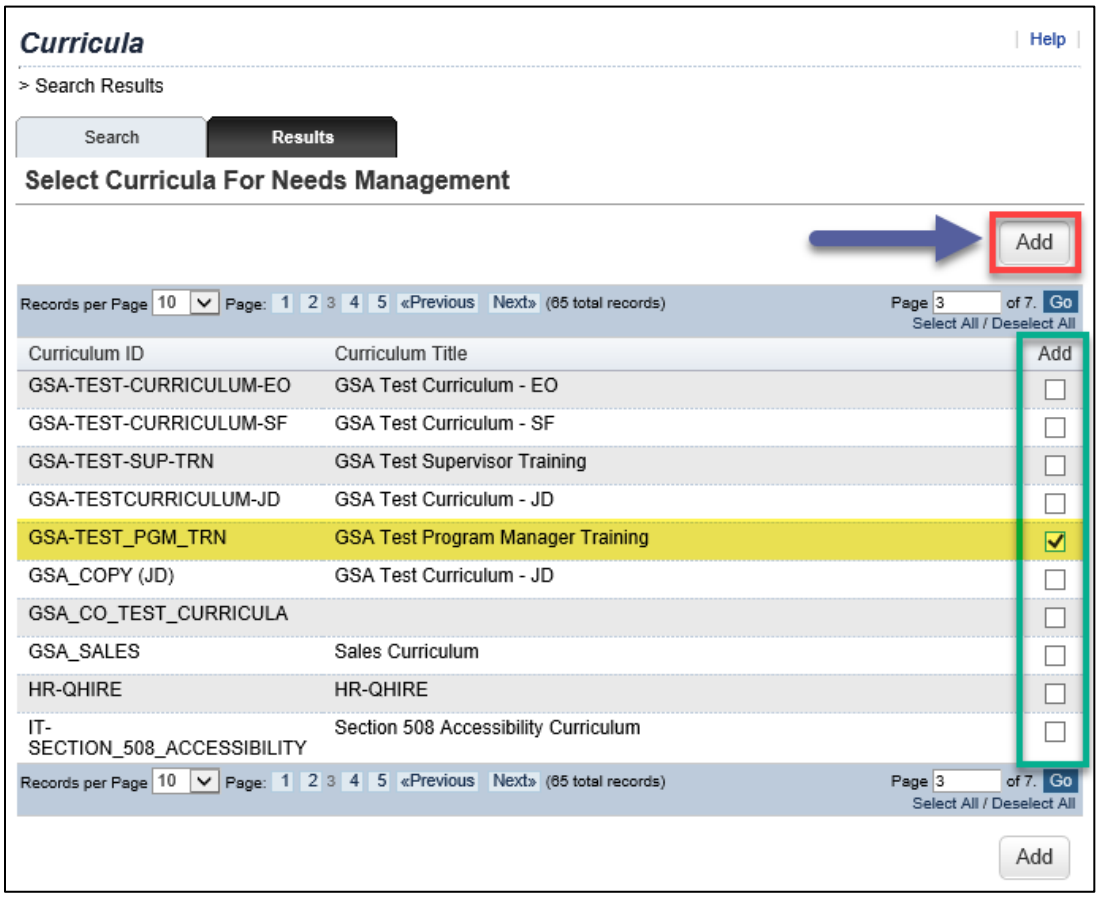
9. Enter a keyword associated with the curriculum **<u>or leave blank</u>** to search all curricula in the system. Click **Search** to find your desired curriculum.




10. Select your desired curricula. Click **Add** to select the curriculum and return to the User Needs Management page.

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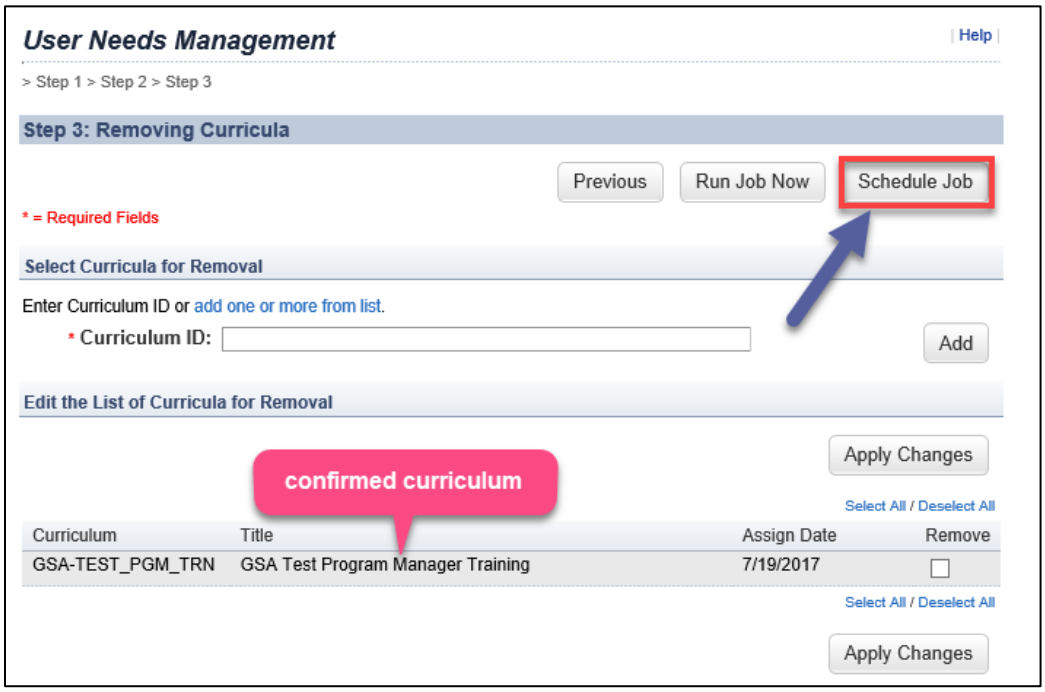
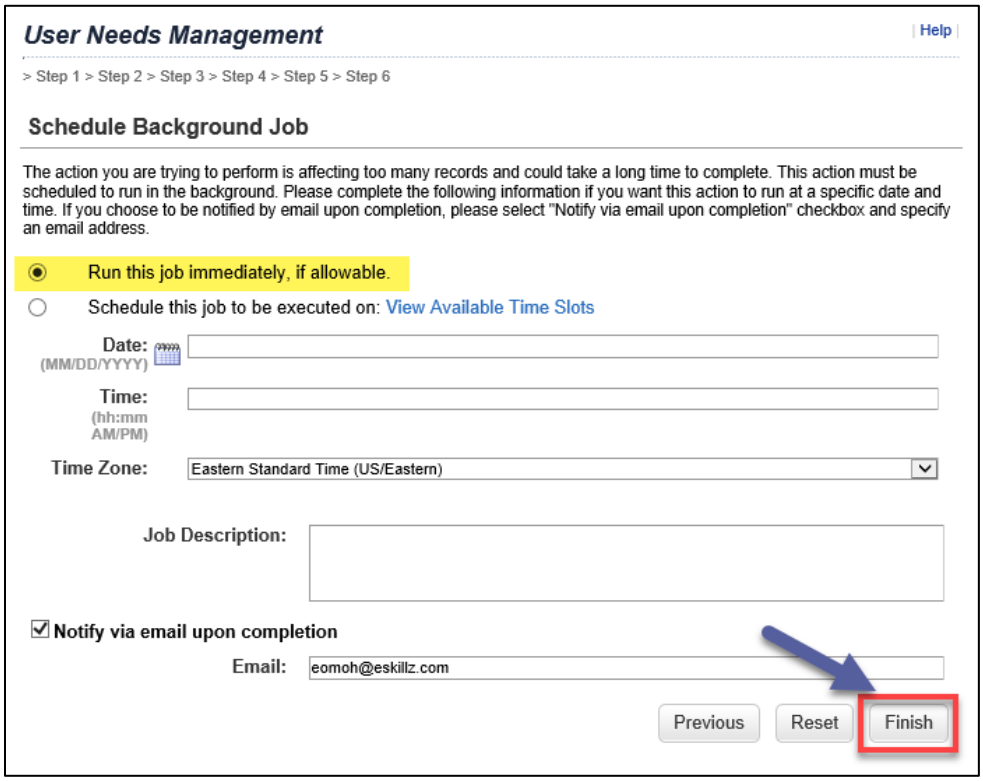
11. Repeat steps 8 – 10 to add more curricula to be removed (if needed). Confirm the curricula to be removed. Click **Schedule Jobs** to advance to the next step.




12. Select *Run this job immediately, if allowable*. Click **Finish** to remove the curriculum.

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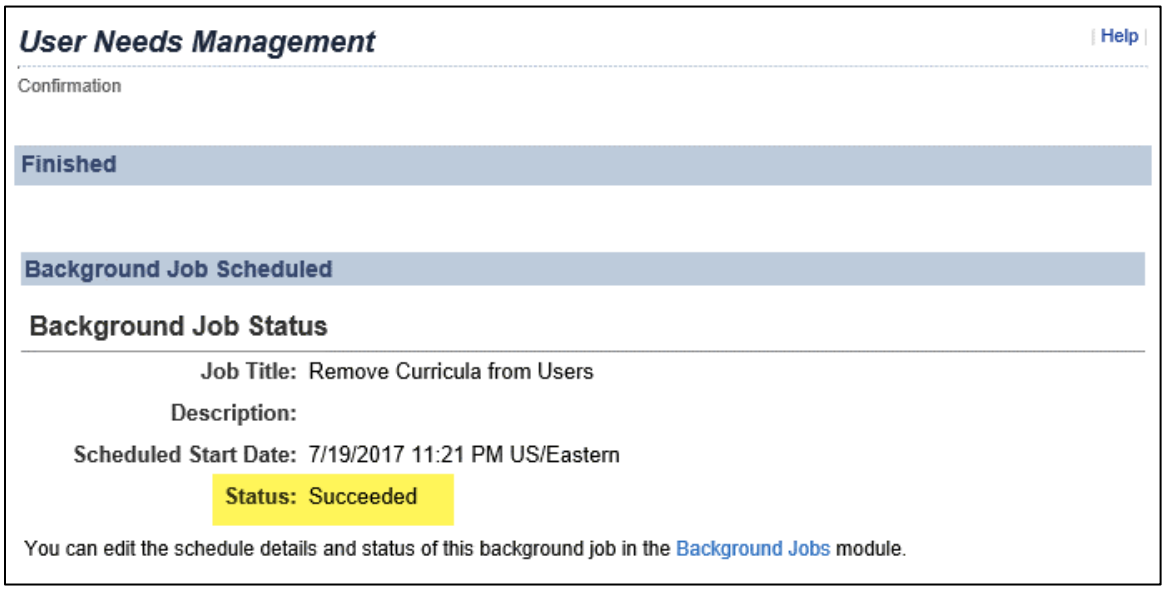
13. You have successfully removed the curriculum!

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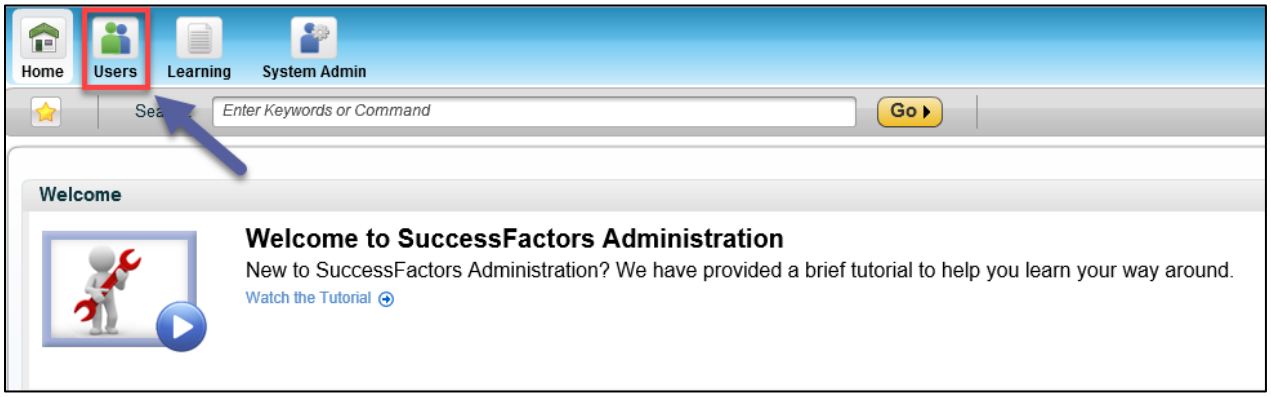
## Remove Curricula

### *Via User Record*

1. From the Learning Administration page (also called SuccessFactors Administration), click on the "Users" icon.




2. Click on **Users** in the left menu frame.

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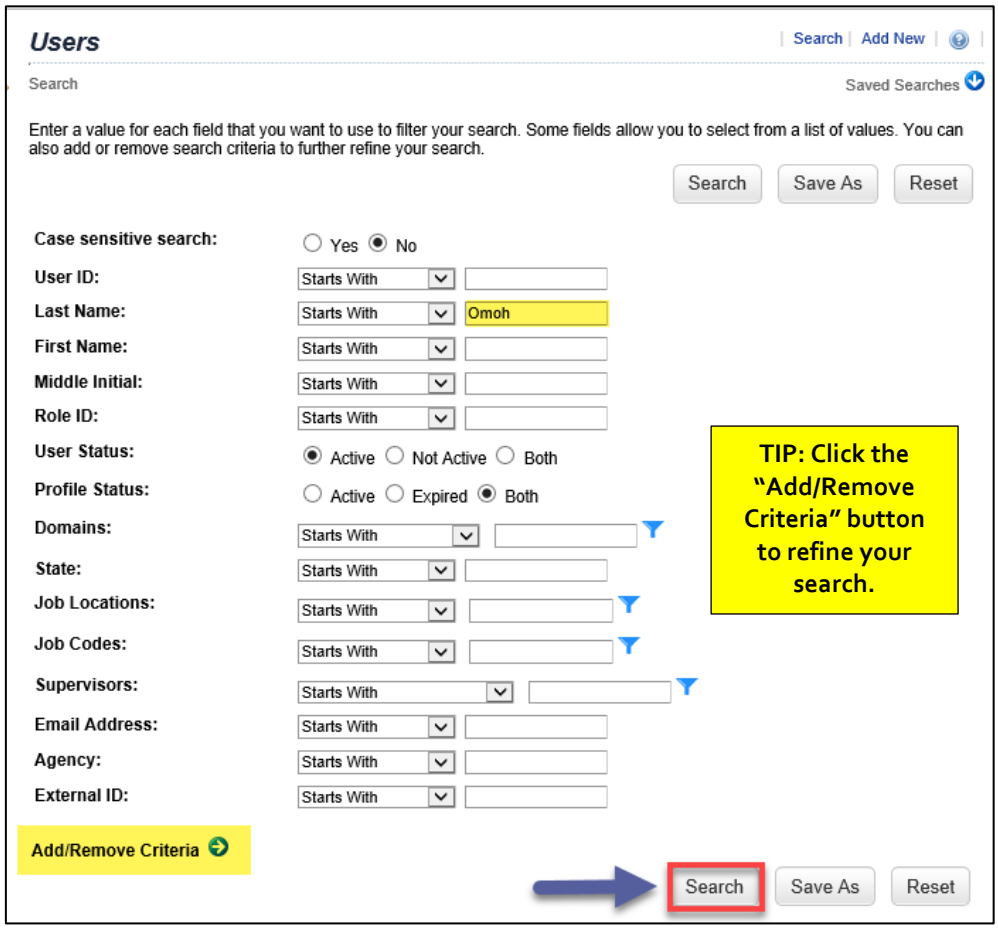
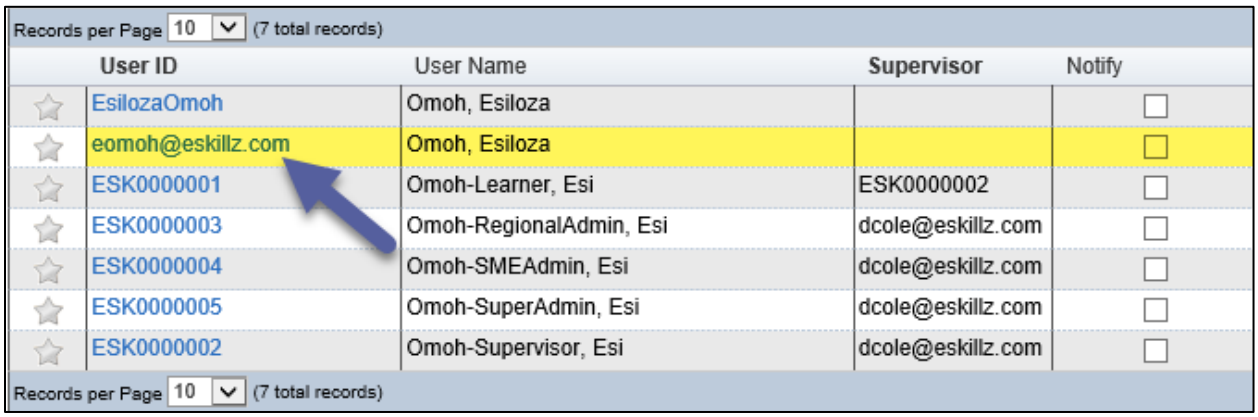
3. Enter a keyword (or last name) associated with the user **<u>or leave blank</u>** to search for all users. Click **Search** to find your desired user.




4. Click on your desired user's **User ID** to open the record.

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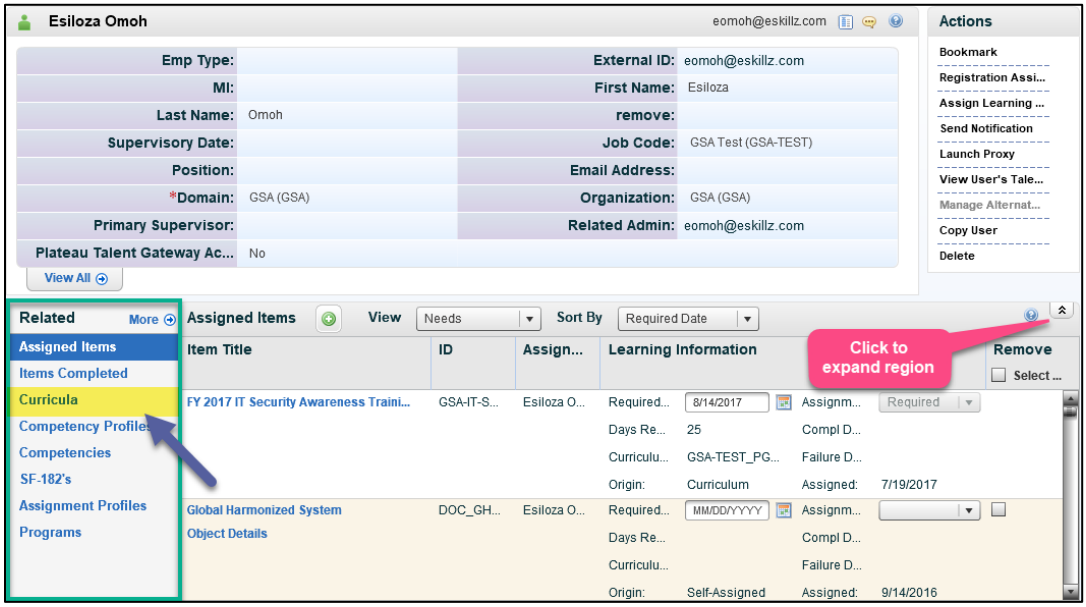
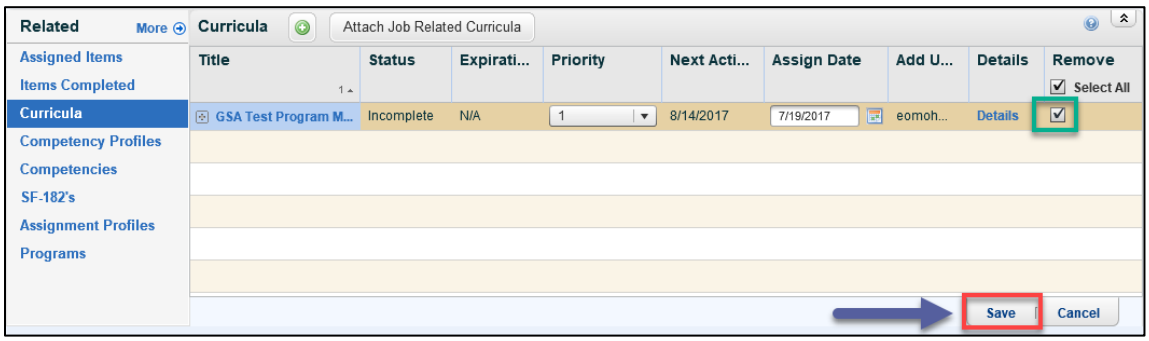
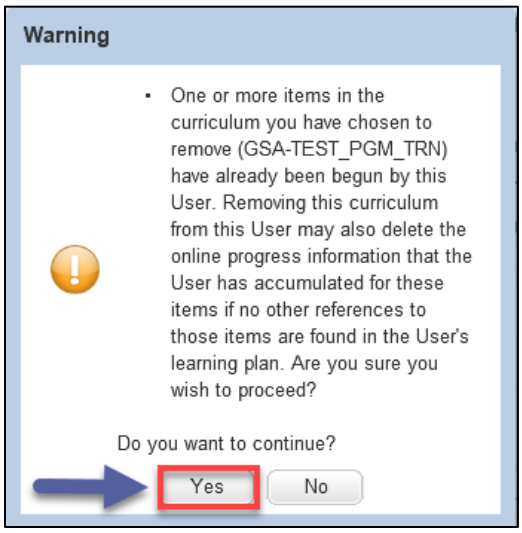
5. In the user's record, locate the Relate Menu. Click on **Curricula**.




6. Locate the curriculum you wish to remove, then select the "Remove" box. Click **Save**.




7. Click **Yes**.

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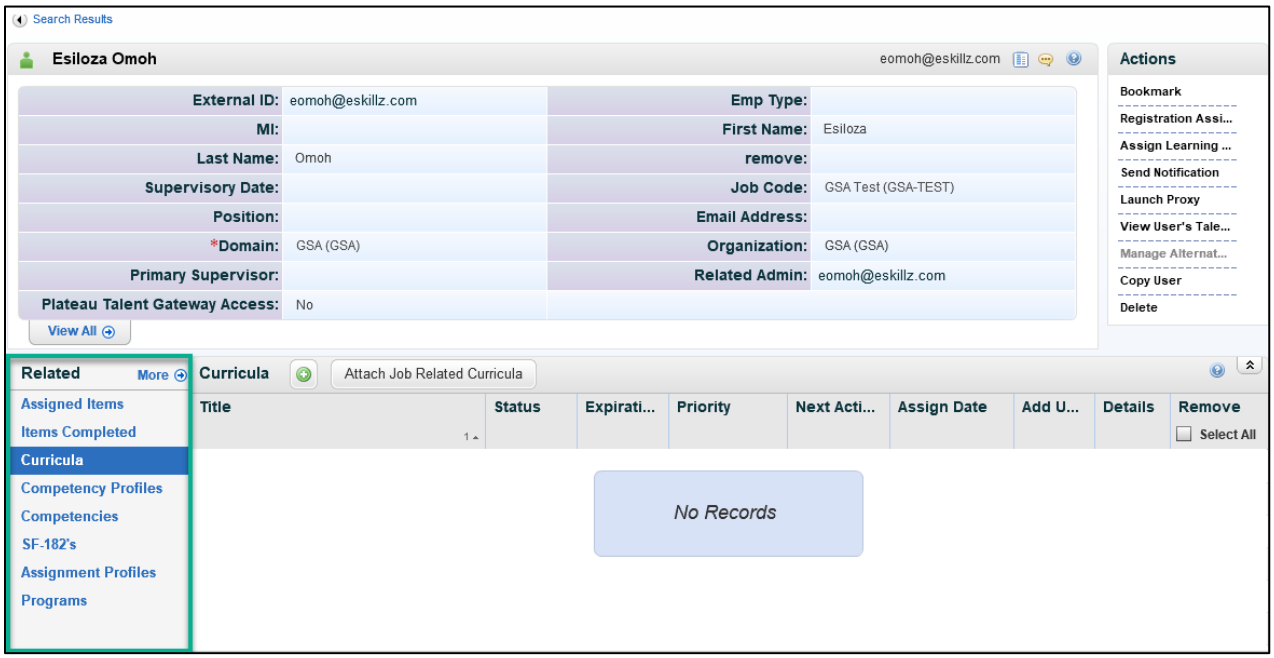
8. You have successful removed your curriculum!

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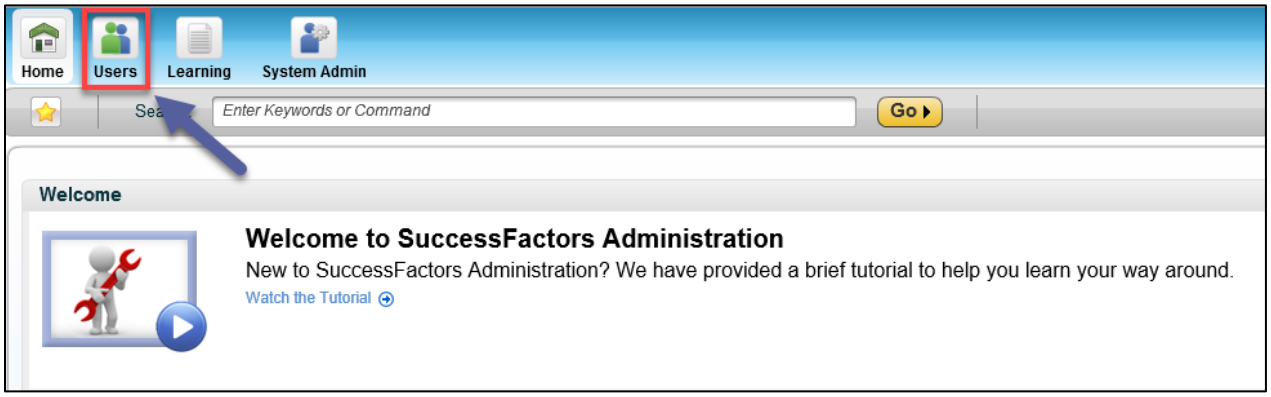
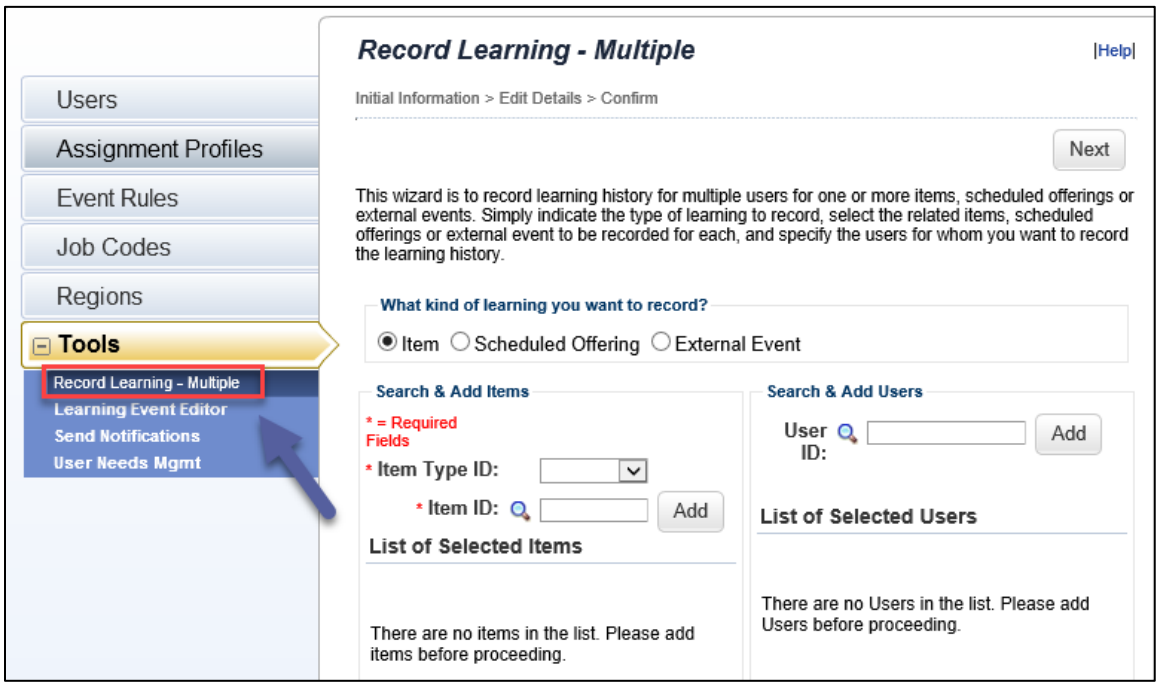
## Record Item Completion

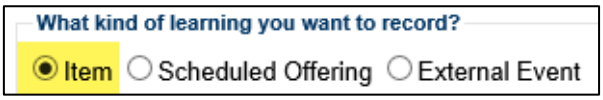
1. From the Learning Administration page (also called SuccessFactors Administration), click on the "Users" icon.




2. Click on **Tools** in the left menu frame to expand the tab, then click on **Record Learning – Multiple**.




3. On the Record Learning - Multiple Page, select the kind of learning you wish to record.

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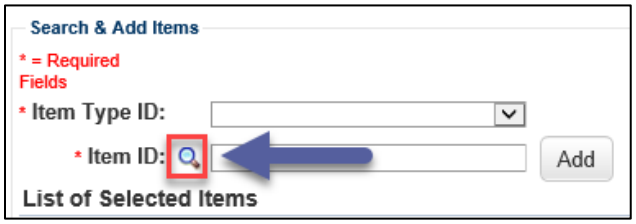
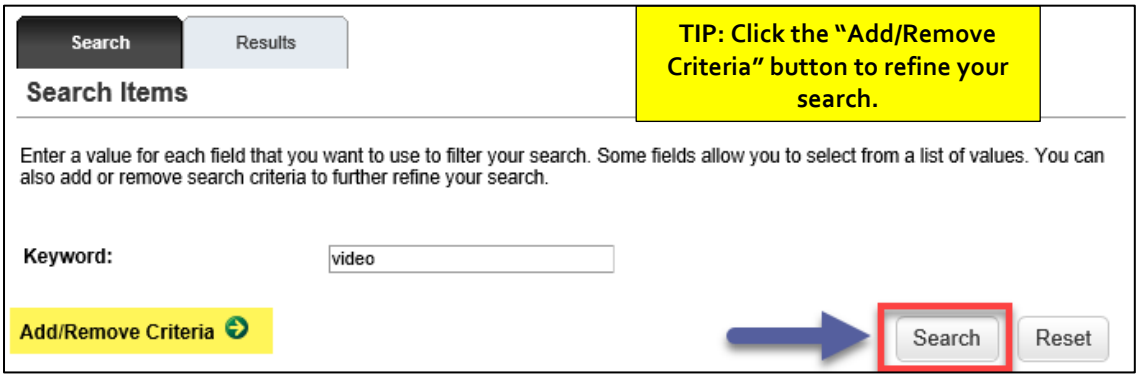
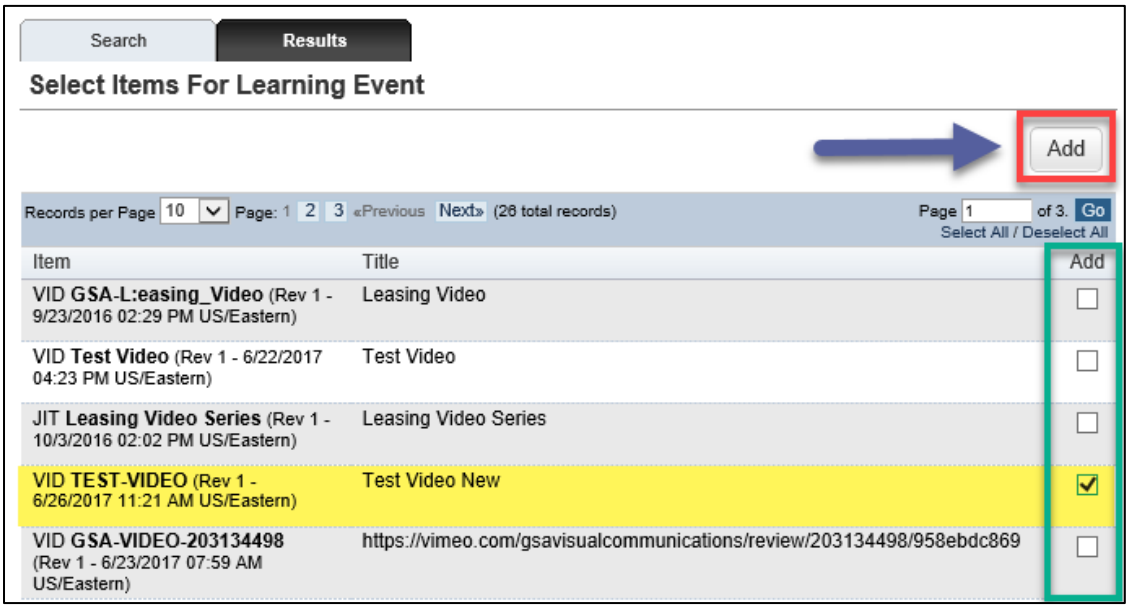
4. To select an item to record learning, click on the icon. A popup window will open with a list of item search criteria.




a. Enter a keyword associated with the curriculum **<u>or leave blank</u>** to search all items in the system. Click **Search** to find your desired item.




b. Select your desired item(s). Click **Add** to select the item(s) and return to the Record Learning - Multiple Page.

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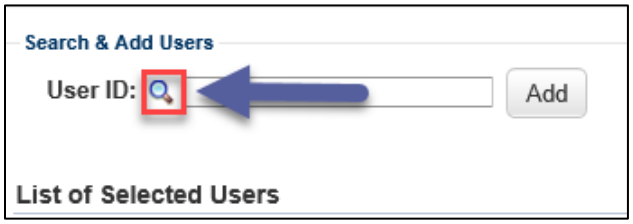
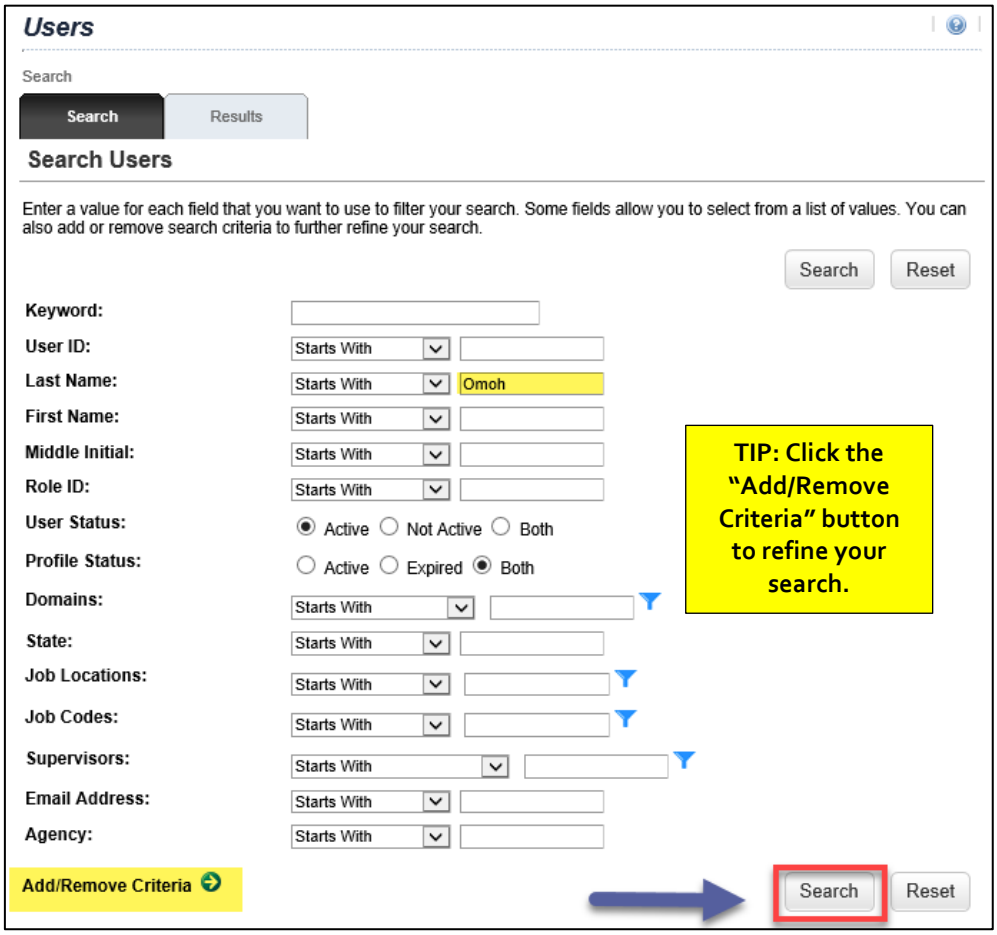
5. To select a user to record learning for, click on the icon. A popup window will open with a list of user search criteria.




a. Enter a keyword (or last name) associated with the user **<u>or leave blank</u>** to add multiple users. Click **Search** to find users.




b. Select your desired user(s). Click **Add** to select the user(s) and return to the Record Learning – Multiple Page.

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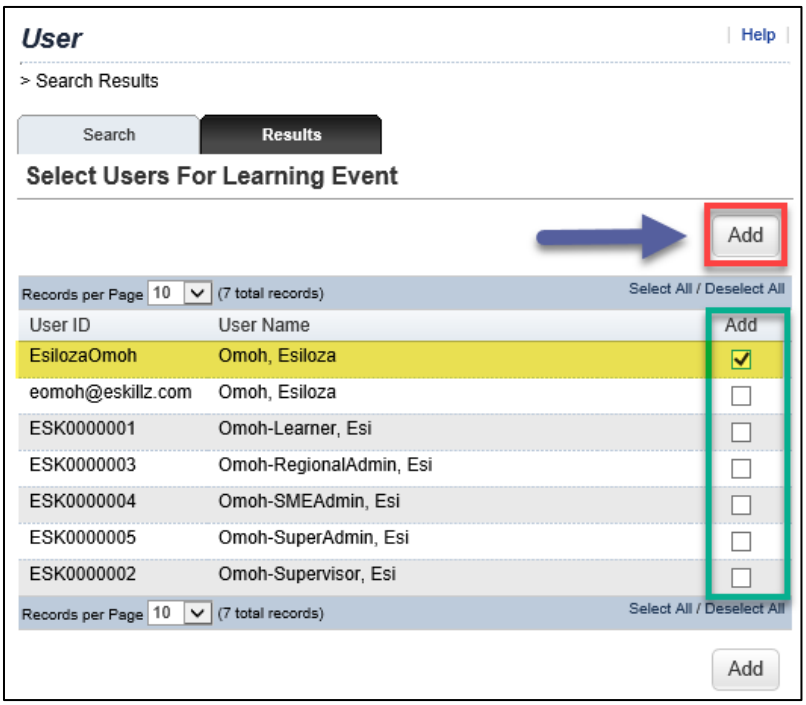
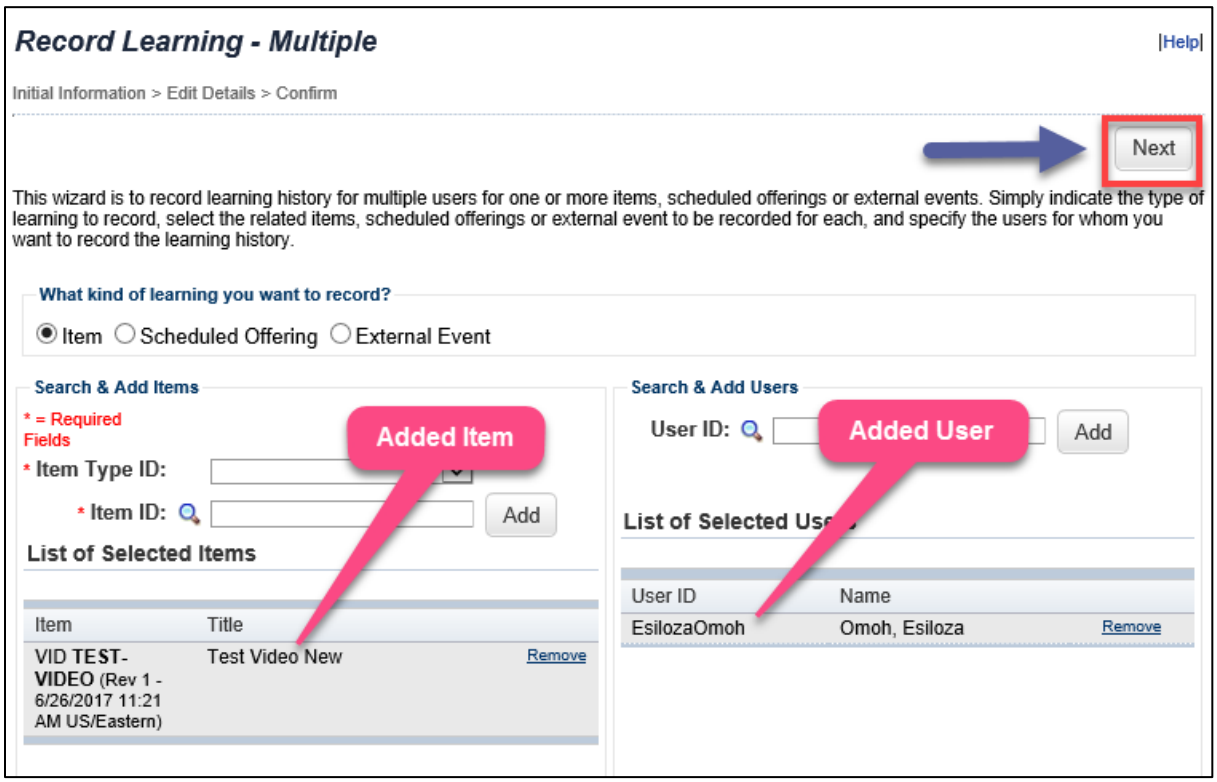



6. Repeat step 5 to add more users (if needed). Once you have added all desired users, click **Next** to advance to the next step.

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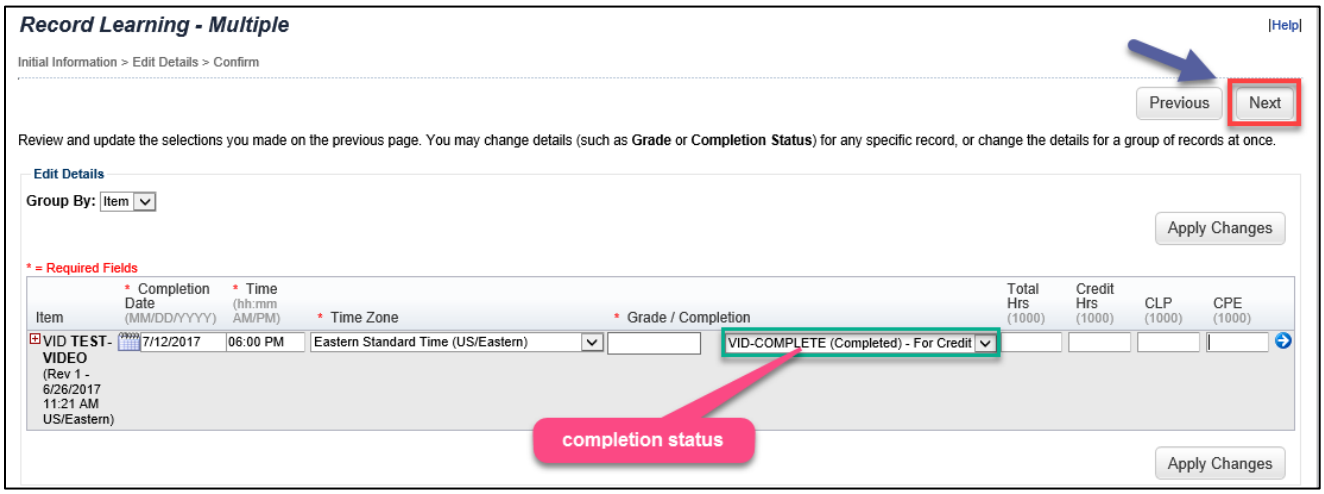
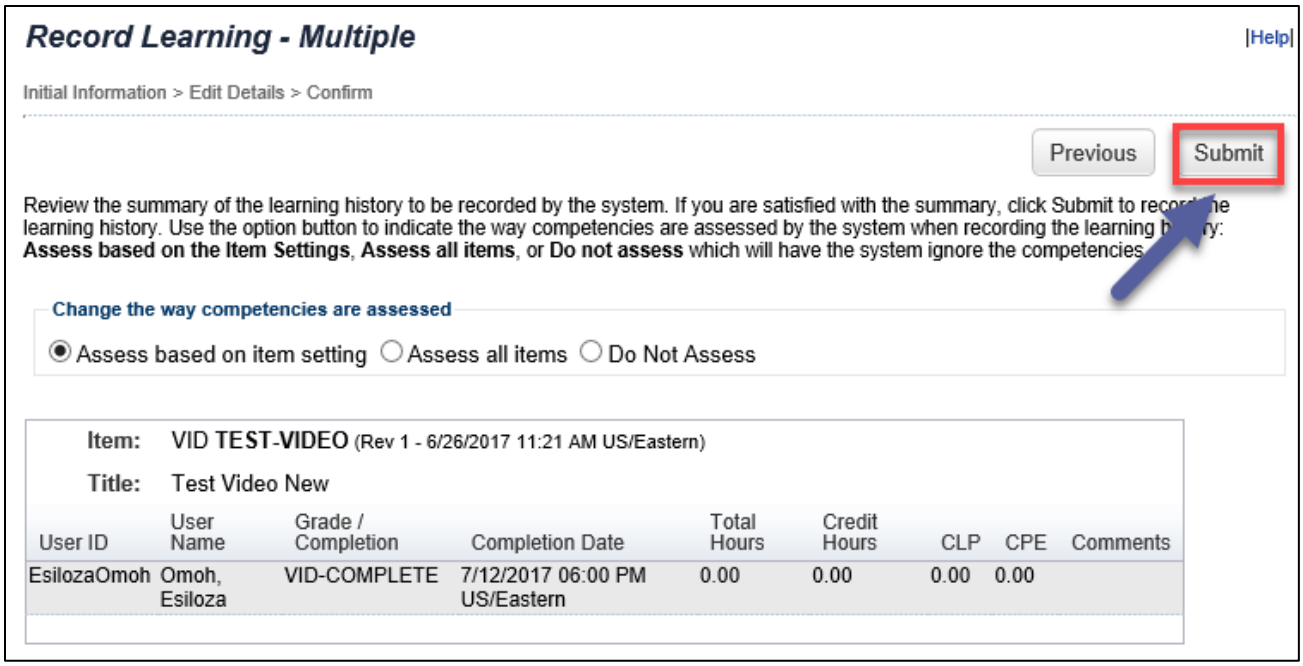
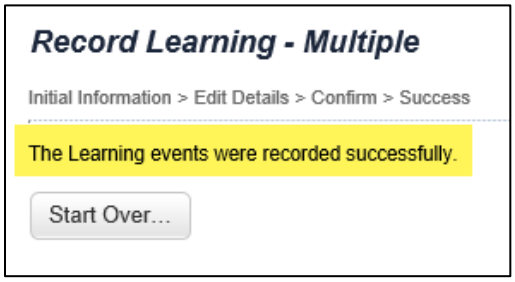
7. Select the completion status to be given and click **Next** to advance to the next step.




8. Click **Submit** to record learning for the selected item.




9. You have successfully recorded learning!

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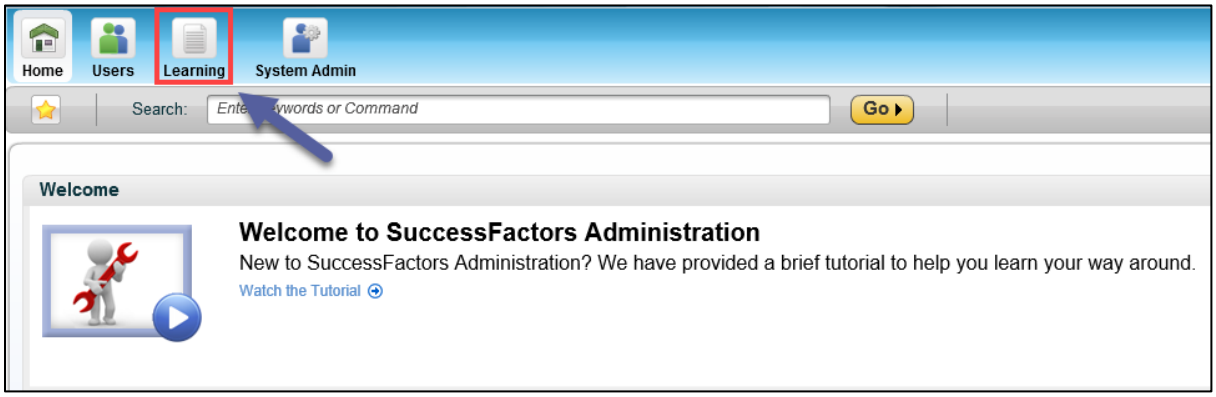
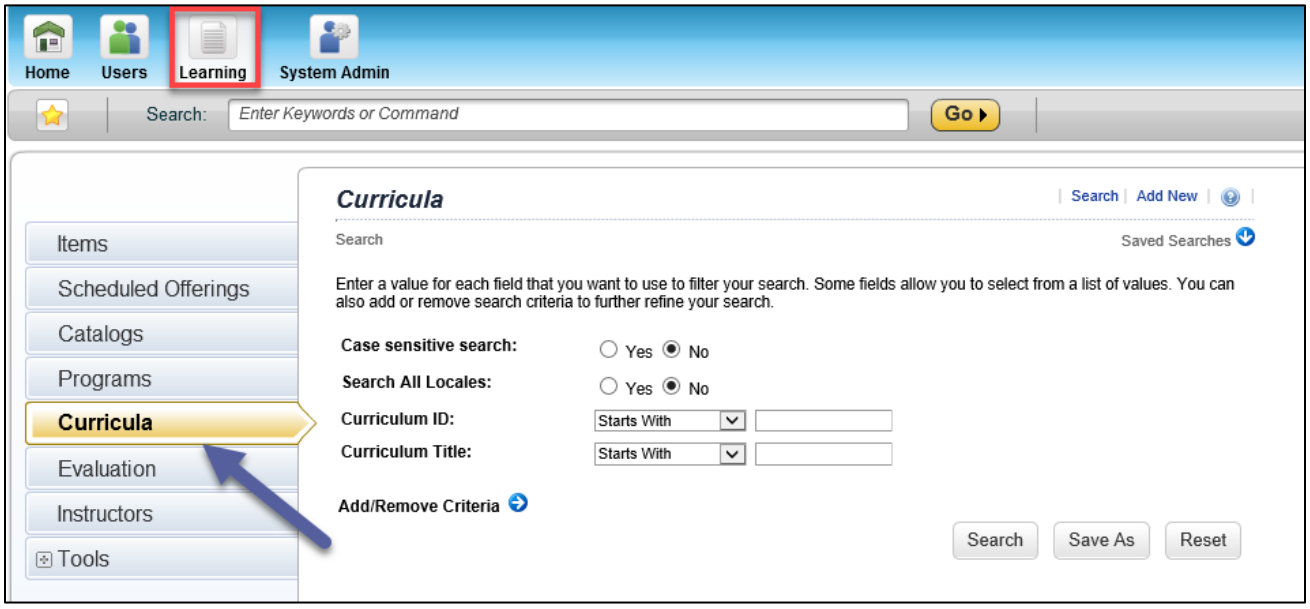
## Email Learners

1. From the Learning Administration page (also called SuccessFactors Administration), click on the "Learning" icon.




2. Click on the Curricula tab in the left menu frame. You will be directed to the area of the system where you can search and view the Curriculum you wish to assign.




3. Enter the *Title* of your desired curriculum. You can use the drop-down menu associated with most criteria to refine your search (ex: "starts with" vs. "contains"). Click **Search** to search for your desired curriculum.

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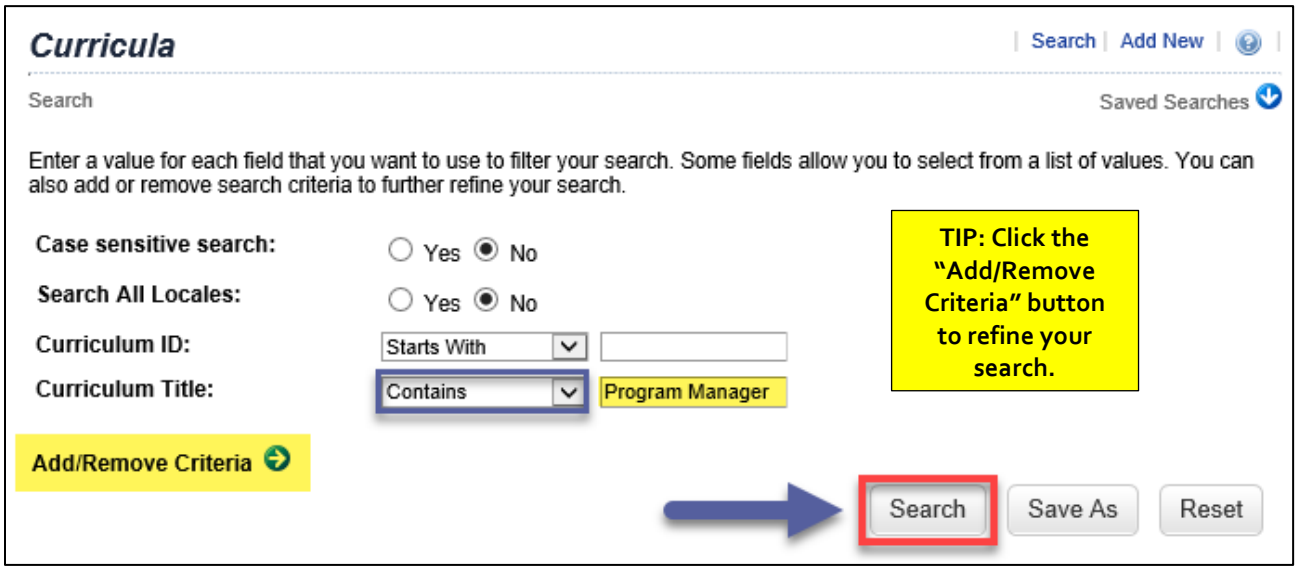
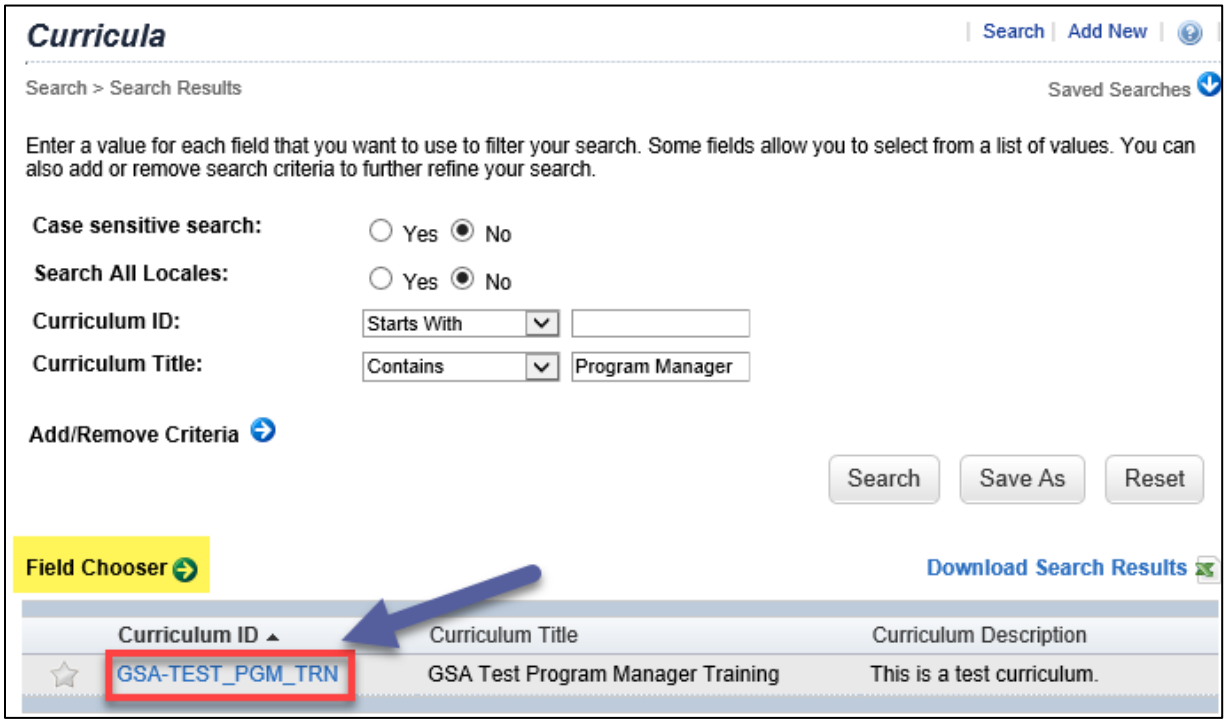



4. Locate your desired curriculum. Click on the *Curriculum ID* to select and open the curriculum.




5. On the Curriculum Administration Page, locate the Actions Menu and click **Send Notification**.

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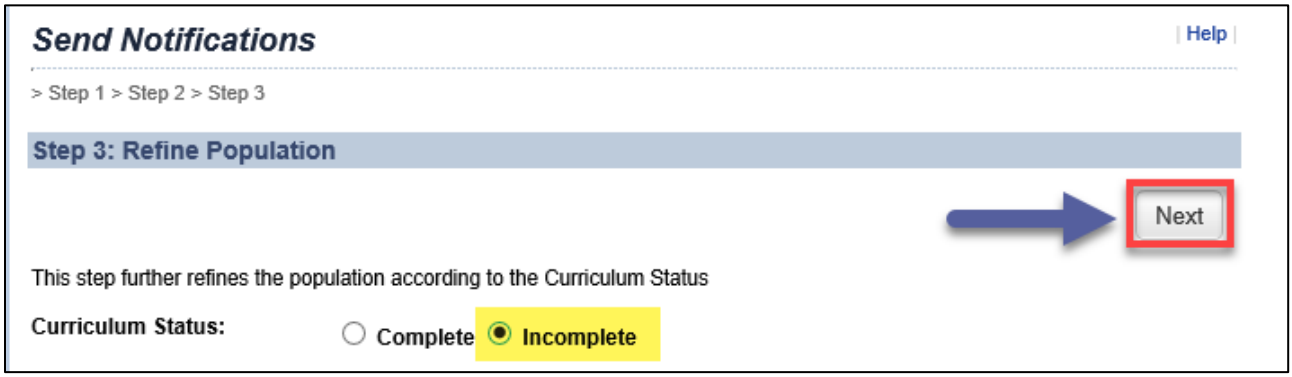
6. On the Send Notifications page, select the curriculum status of the population you wish to notify. *(Ex: Incomplete users).* Click **Next** to advance to the next step.




7. A list of users will be populated under the "*Update Users"* section, based on the curriculum status you selected in the previous step. Click **Next** to advance to the next step.
***NOTE**:You many click on **add one or more from list** to select more users to notify.

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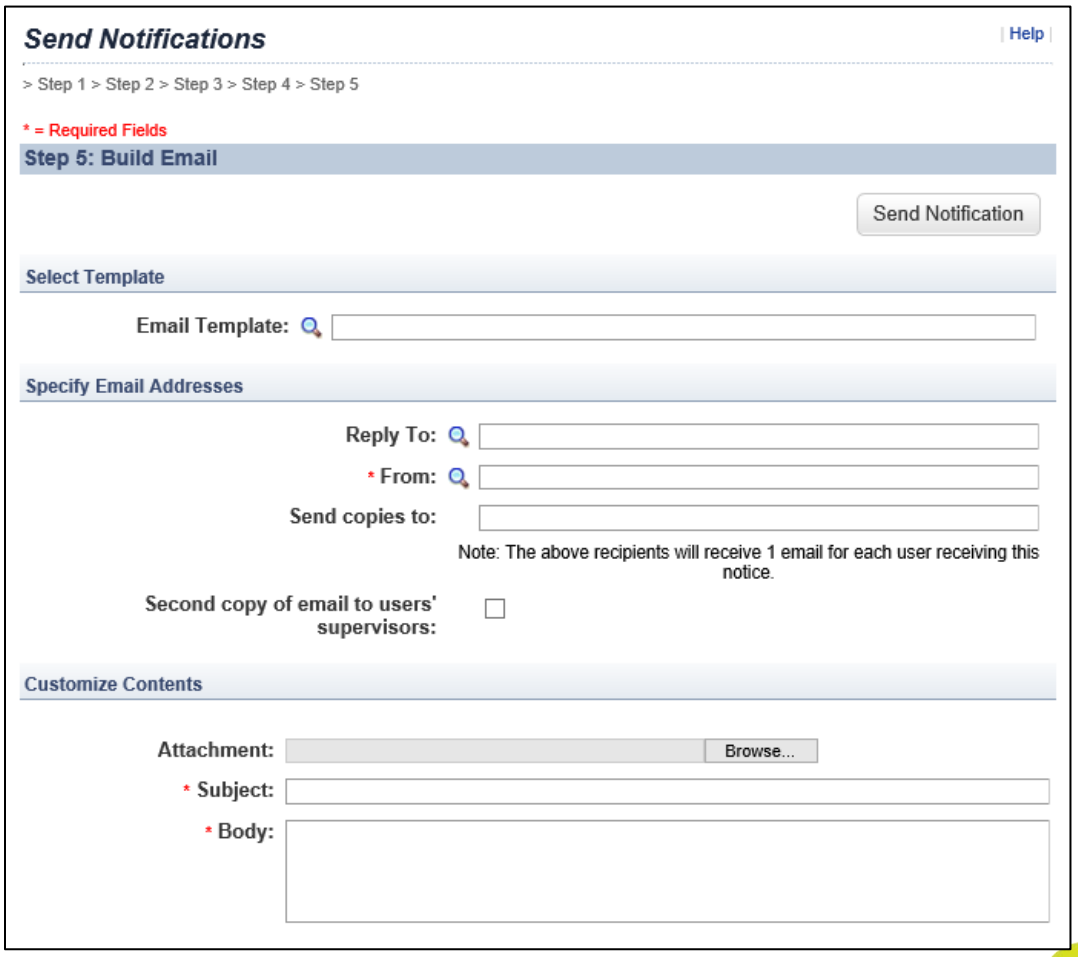
8. Build your notification email by filling in the appropriate fields.

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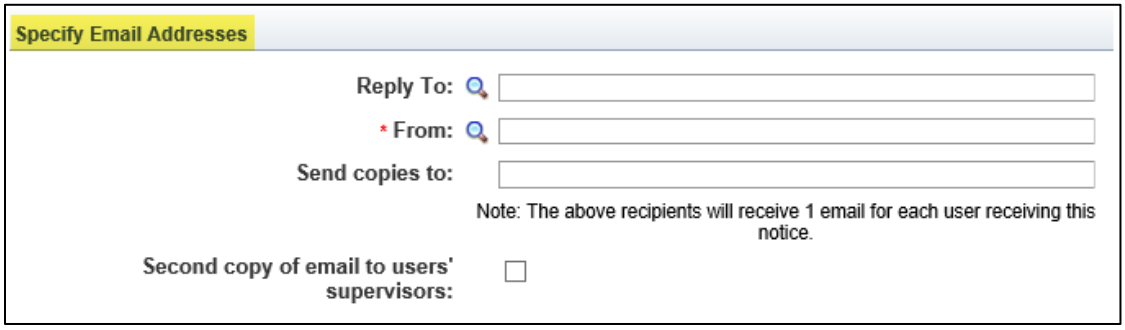
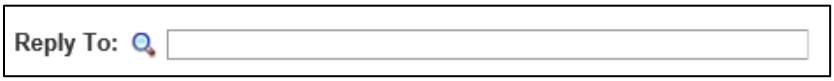
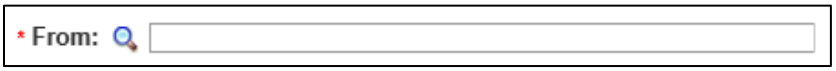
9. *Specify Email Addresses*



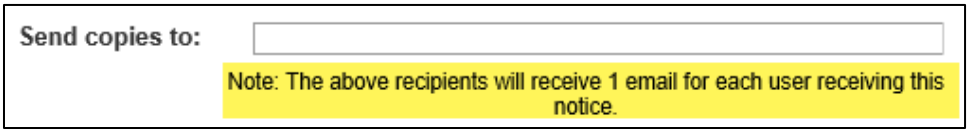

a. *Reply To*: Enter the email address you want users to respond to (usually the email sender).



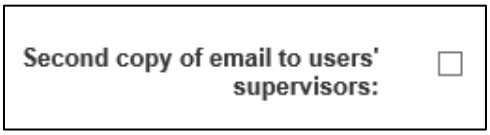

b. *From*: Enter your email address (or the email address of the person you are sending the email on behalf of).



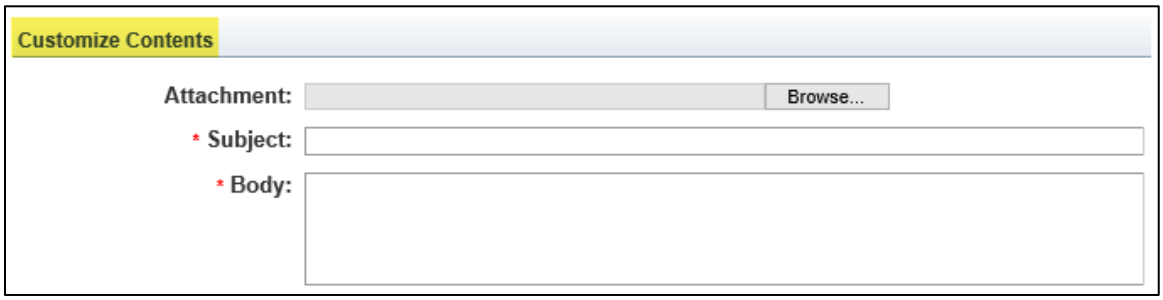

c. *Send copies to*: (leave this field blank)
**Note**: The recipients entered in the Send copies to box will receive an email for EVERY user receiving this notification. Ex: If you are sending this request to 5 participants, the recipient will receive 5 different emails.




d. *Send copies of email to users' supervisors*: Leave this field blank if you don't want supervisors to also receive your email notification.




10. *Customize Contents*

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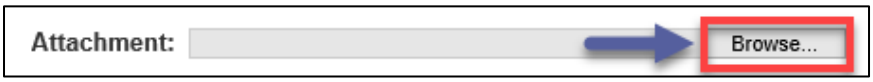
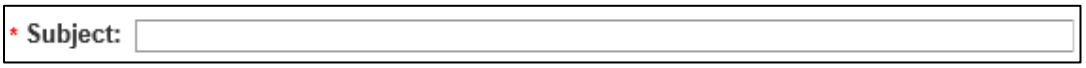
a. *Attachment*: Click on **Browse** to search your computer for files you would like to add as an attachment to your notification.

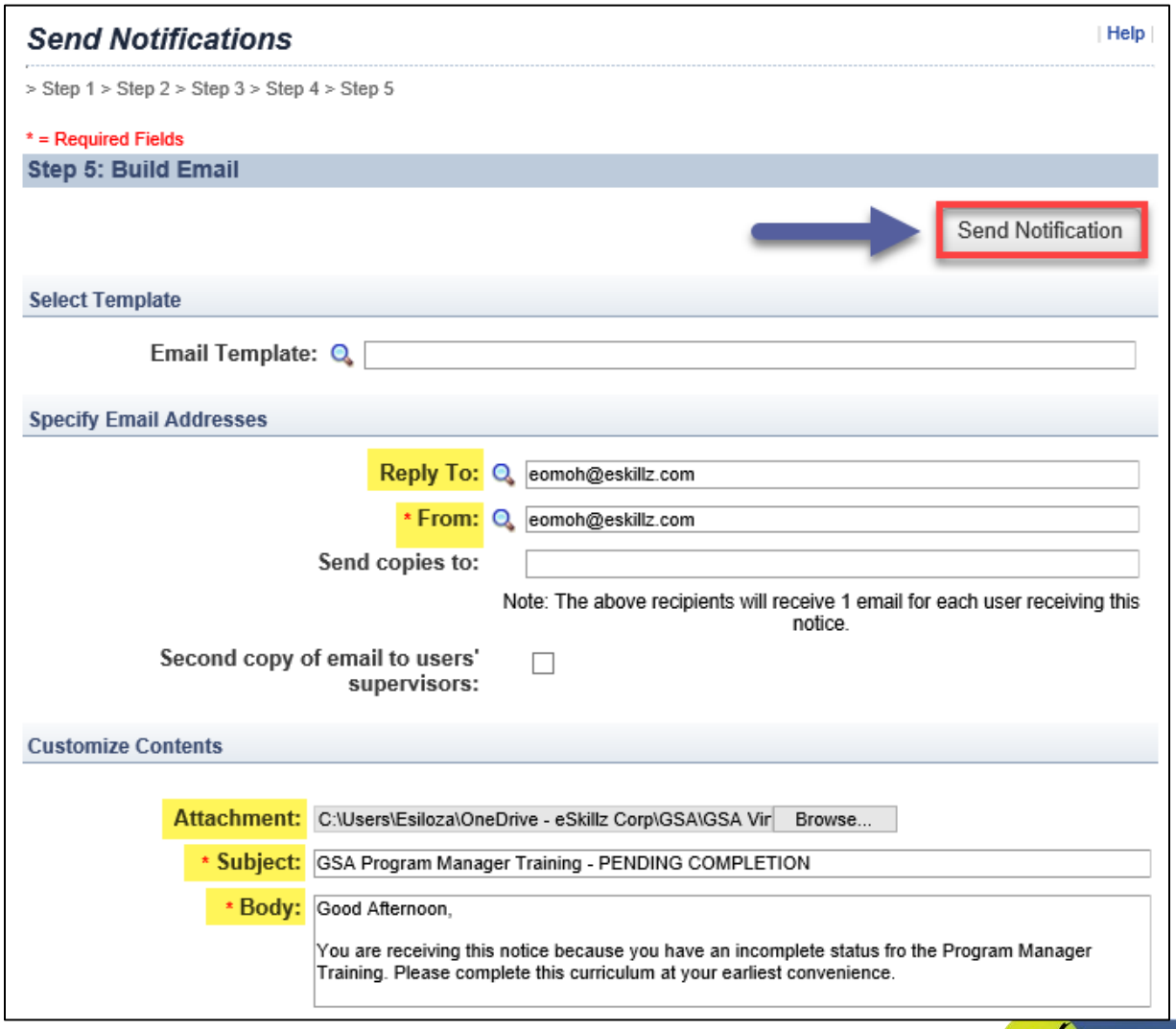



b. *Subject*: Enter the subject of your notification email.




c. *Body*: Enter the notification message in this section

11. Once you've entered your notification details, click **Send Notification**.

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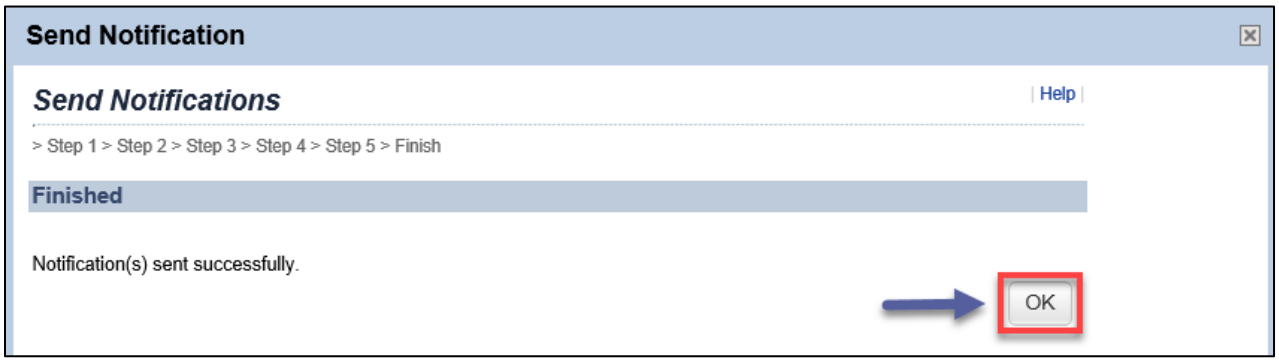
12. You have successfully sent your notification! Click **OK** to return to the Curriculum Administration Page.

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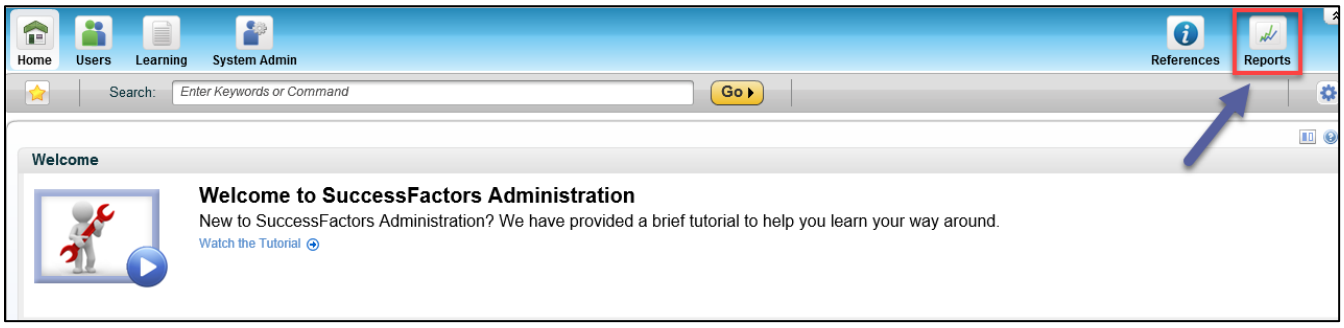
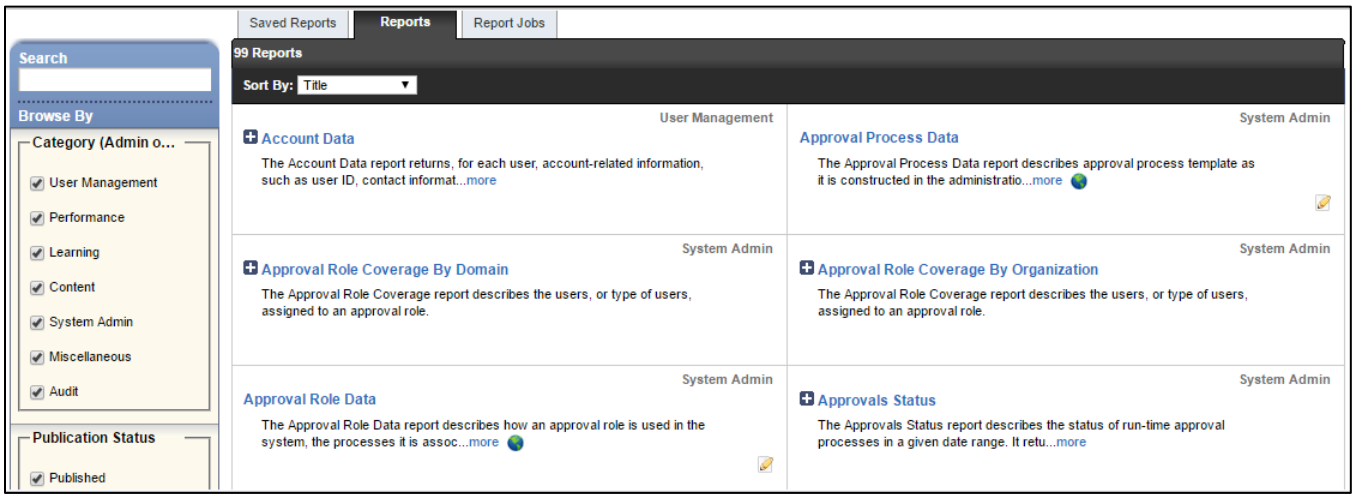
## Reports Area Navigation

1. From the Learning Administration page (also called SuccessFactors Administration), click on the "Reports" icon.




2. You are now in the Reports area of the system. From this page, you can search and run desired reports.

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# REPORTING

## Report Management

### *Common Reports*

As an administrator, you have access to many searchable reports that can also be filtered by categories. For curricula, the Curriculum Item Status and Curriculum Status report will be the best reports to get individual and overall completion status for users assigned to a curriculum.

Here are 10 common reports to reference for Program Manager related tasks:

1. ***Certificate of Completion for Offerings*** – Displays certificates of completion for users by SO.
2. ***Curricula Item Status*** – Displays curricula, items assigned to each curriculum, and user completion status.
3. ***Curriculum Status –*** Displays the curricula assigned to each user and their curriculum completion status.
4. ***Item Data*** – Displays attributes of learning items.
5. ***Item Requests*** *(Group By Item)* – Returns information on users who have requested items, but who have not yet been registered or waitlisted in a SO of the item.
6. ***Item Status*** – Displays user completion status for items within a date range.
7. ***Item Status (User)*** – Displays user progress toward learning item completion.
8. ***Program Status*** – Displays the program(s) assigned to each user and their program completion status.
9. ***Registration Status*** *(Group By Scheduled Offering)* – Displays detailed registration information by SO.
10. ***Scheduled Offering Roster*** – Displays a roster of registered users in a SO.

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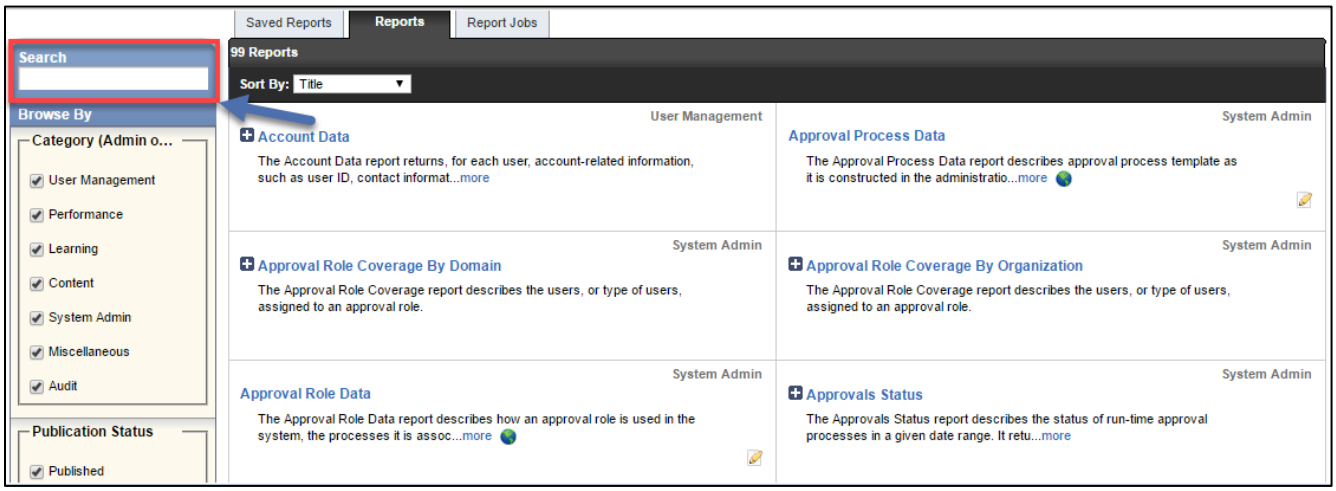
## Report Management

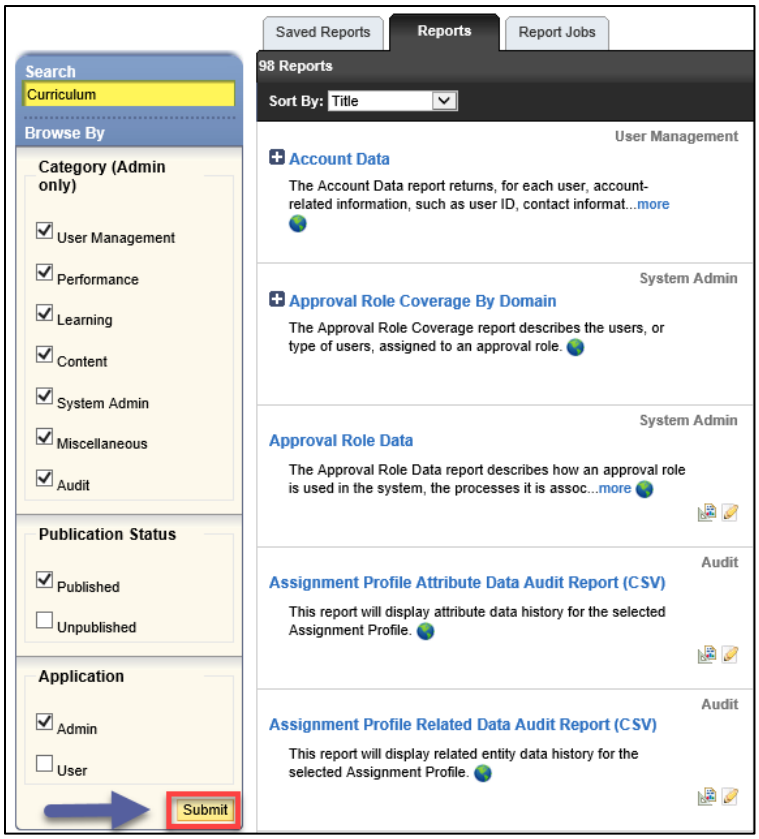
### *Search Reports*

As an administrator, you have access to many searchable reports that can also be filtered by categories.

1. On the Reports page, locate the Search box in the left menu navigation tab.




2. Enter the name or keyword associated with your desired report type. Click **Submit** to enter the search.

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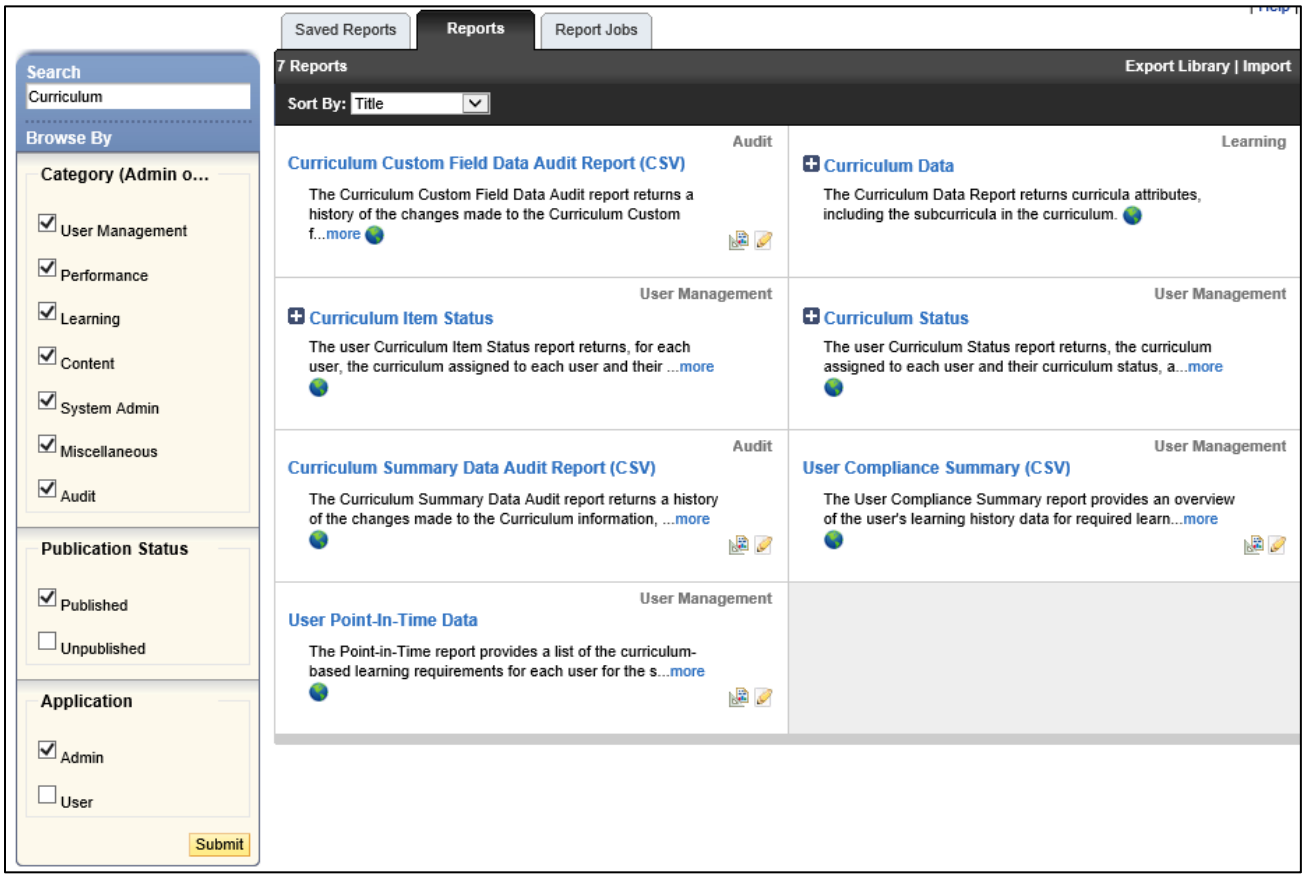
3. Based on the entered keyword, the system will return all reports associated with the search criteria. From the results, you may click a report name to run your desired report.

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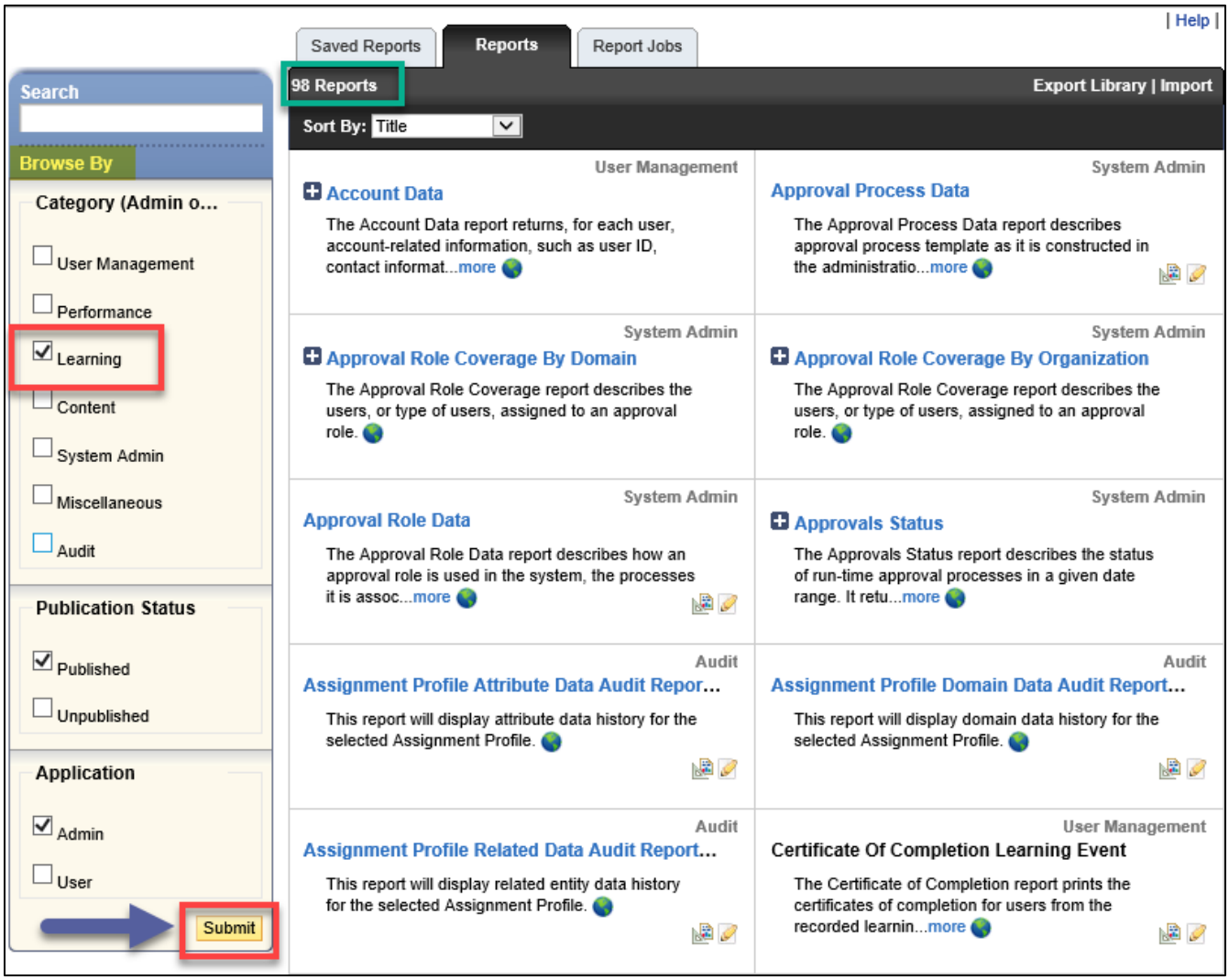
## Report Management

### *Filter Reports*

Reports can be filtered by categories. In the new OLU system, administrators can filter reports by 7 categories: *user management, performance, learning, content, system admin, miscellaneous, and audit.*

1. On the Reports page, locate the *Browse By* category box in the left menu navigation tab. Select the category (may select more than one) you would like to filter reports by. Click **Submit** to activate the filter.

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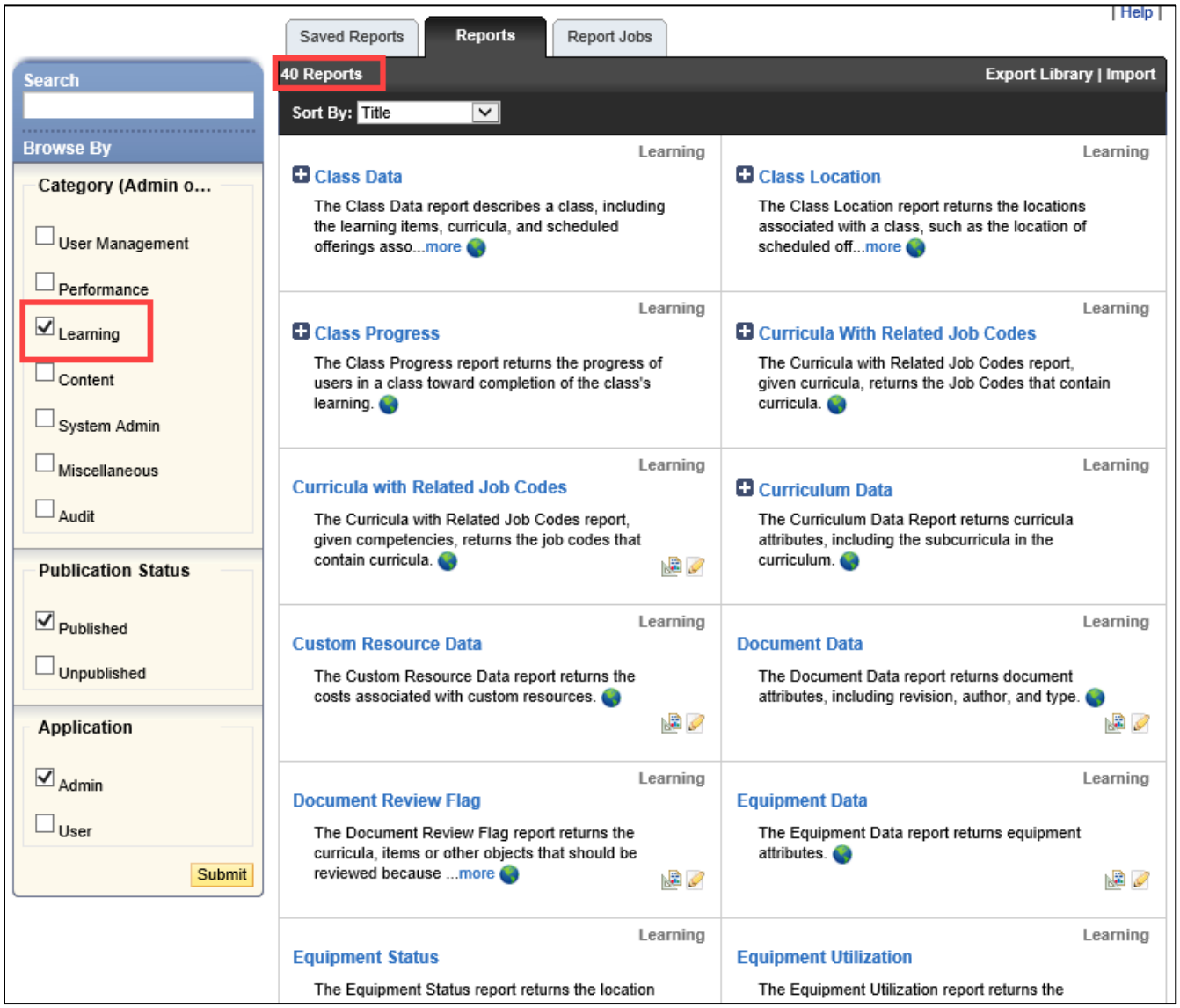
2. Based on the selected category, the system will return all reports associated with the filter criteria. From the results, you may click a report name to run the desired report.

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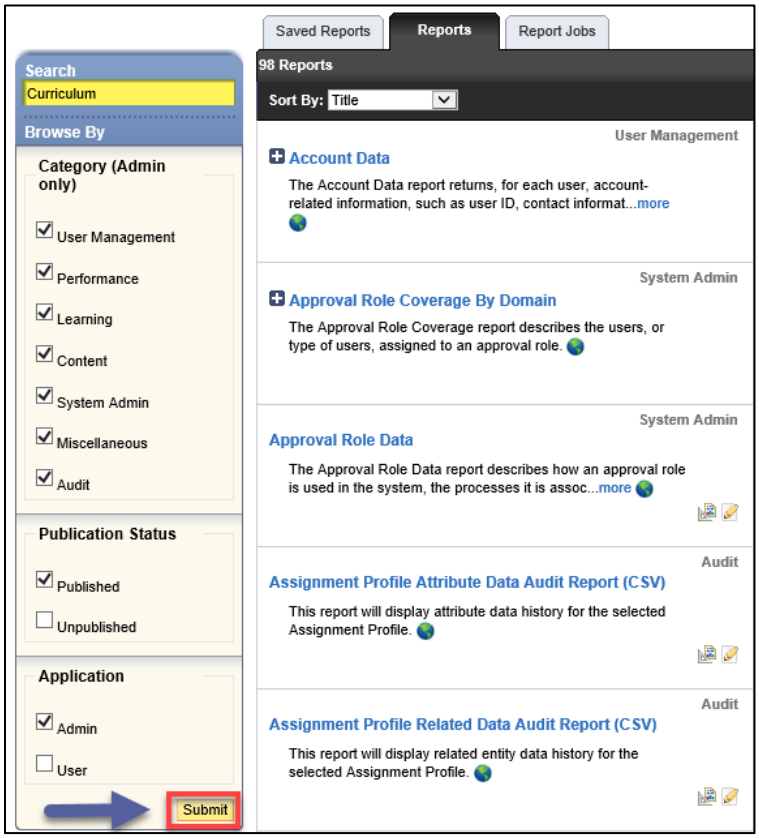
## Report Management

### *Curriculum Status Report*

For curricula, the Curriculum Status report will be the best report to get overall completion status for users assigned to a curriculum. Results can be viewed in HTML or CSV (Microsoft Excel).

1. On the Reports page, locate the Search box in the left menu navigation tab. Enter the name or keyword associated with your desired report type. Click **Submit** to enter the search.




2. Based on the entered keyword, the system will return all reports associated with the search criteria. Locate the "*Curriculum Status*" report.

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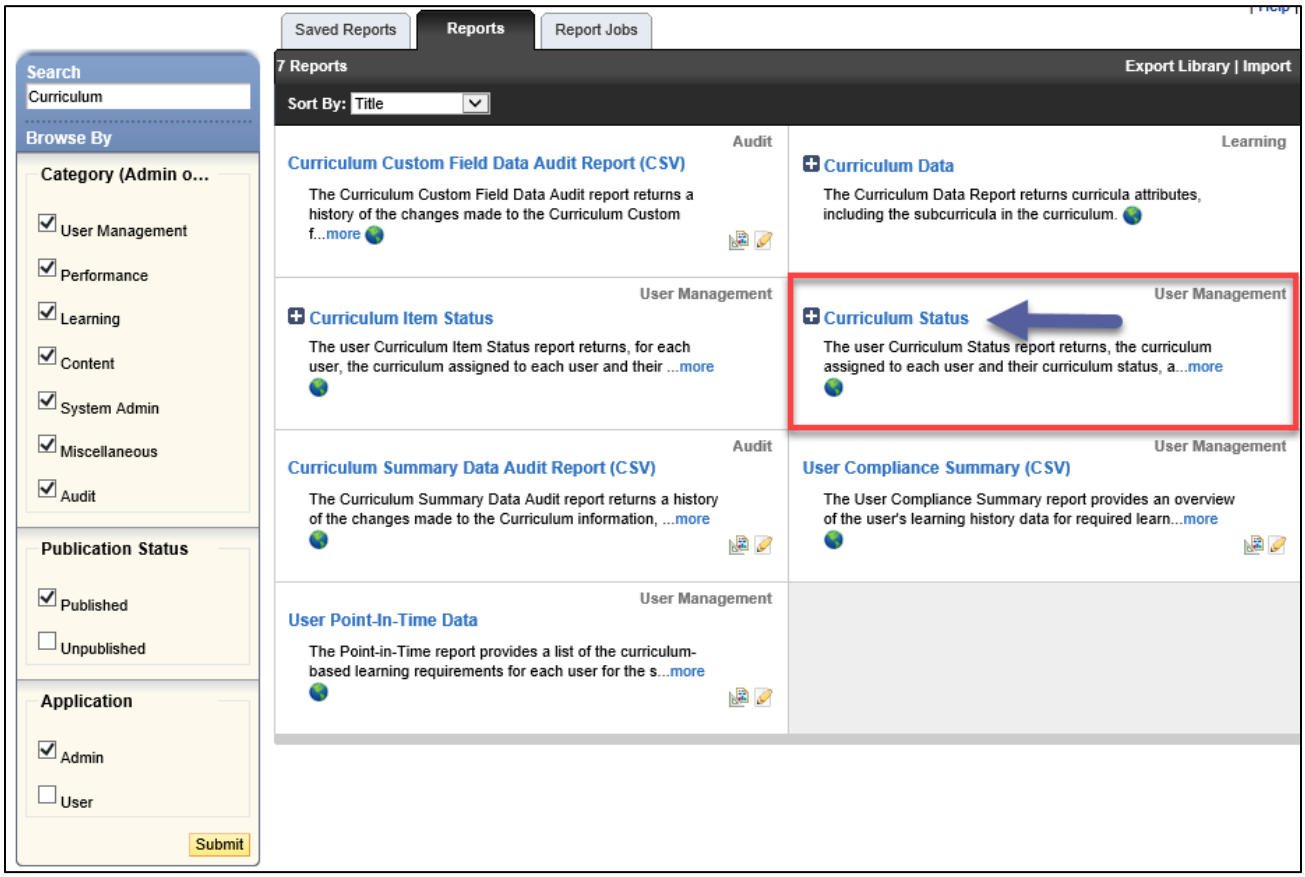
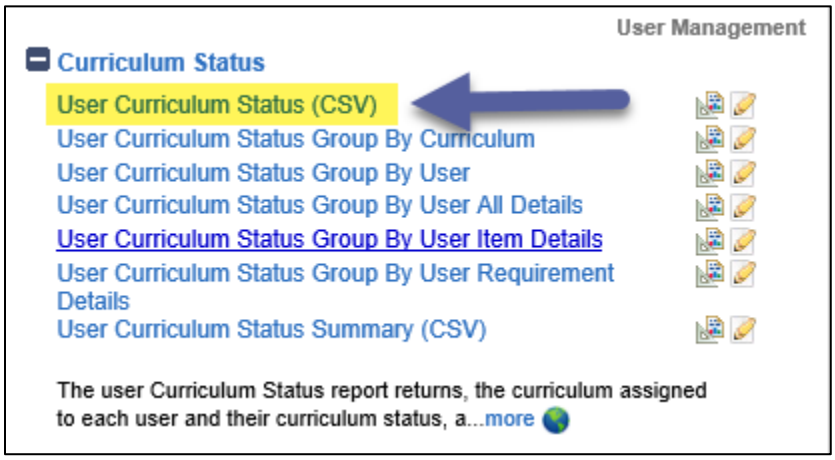



3. Click on the report title to see available report versions. Click on "*User Curriculum Status CSV*" to download the report as an Excel document.




4. On the Run Curriculum Status page, fill in the appropriate information to filter your results.

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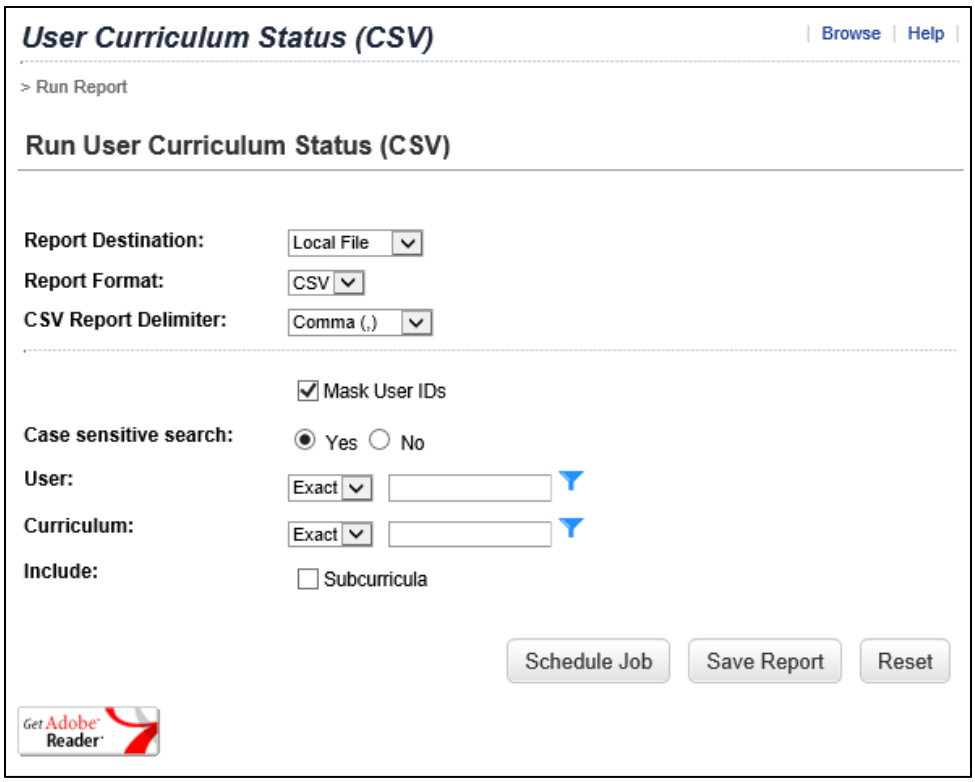
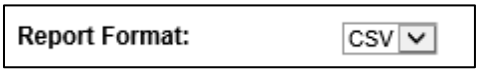
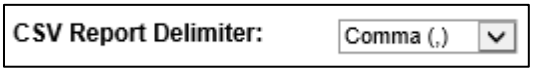



a. **Report Destination:** Use the drop-down menu to select the destination of your downloaded report. Destination options include Browser (open via internet browser), Local File (download to your computer), and Remote File.

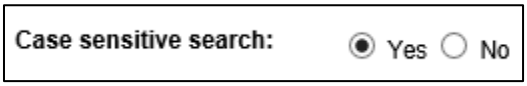
b. **Report Format:** You may choose to leave this as "CSV".




c. **CSV Report Delimiter:** You may choose to leave this as "comma".




d. **Case Sensitive Search:** You may choose to leave as "Yes".

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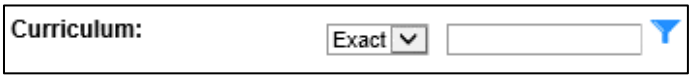
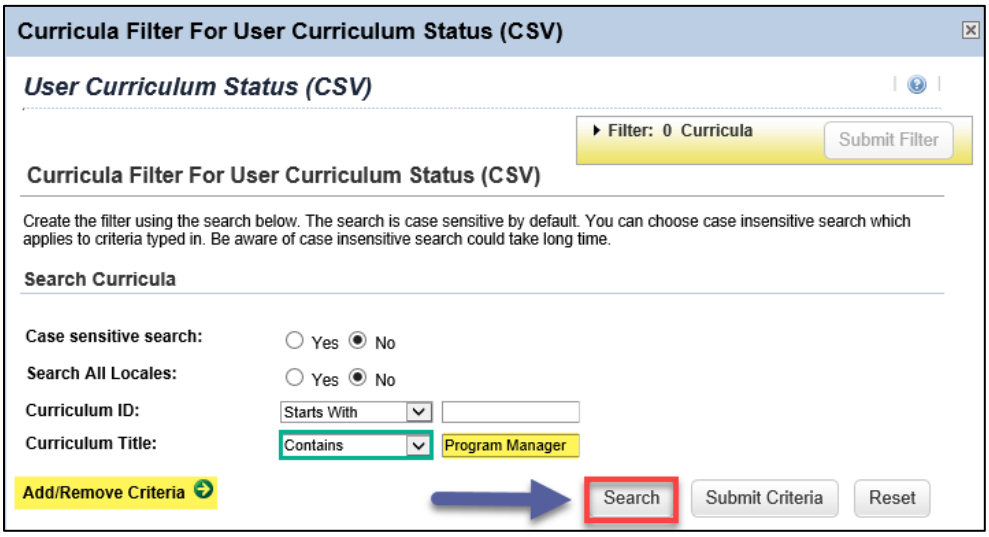
e. **User:** Check the "Mask User IDs" box to hide the learners' user ID info. You may also choose to leave the user field blank to pull all users associated with the desired curriculum.

f. **Curriculum ID**: To filter results by curriculum, click on the icon. A popup window will open with a list of curriculum search criteria.




i. In the popup window, enter the name or keyword associated with the curriculum you wish to report on. Once your criteria have been entered or selected, click **Search** to find your desired curriculum.




ii. Select the curriculum you wish to report on and click **Add to Filter**.

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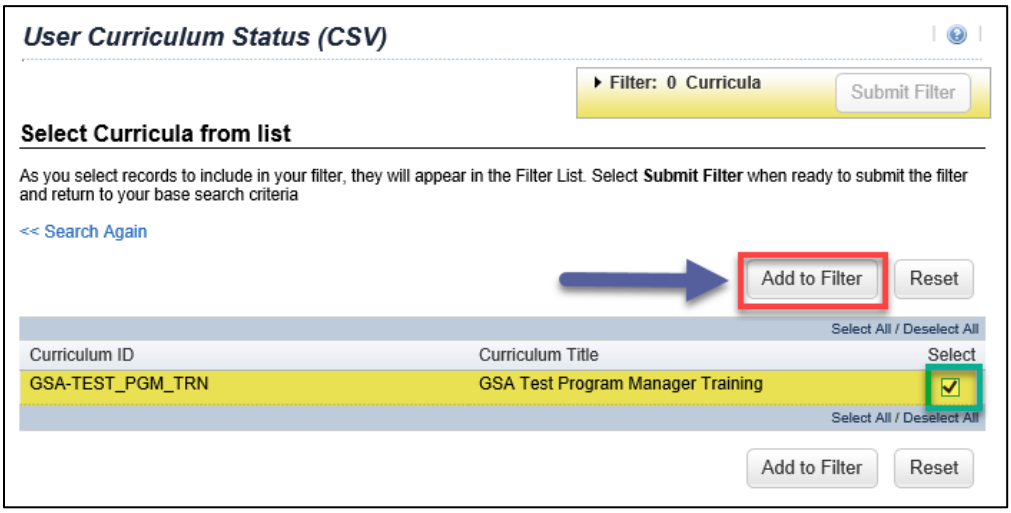
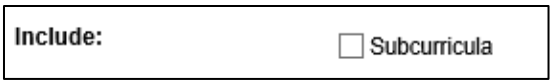
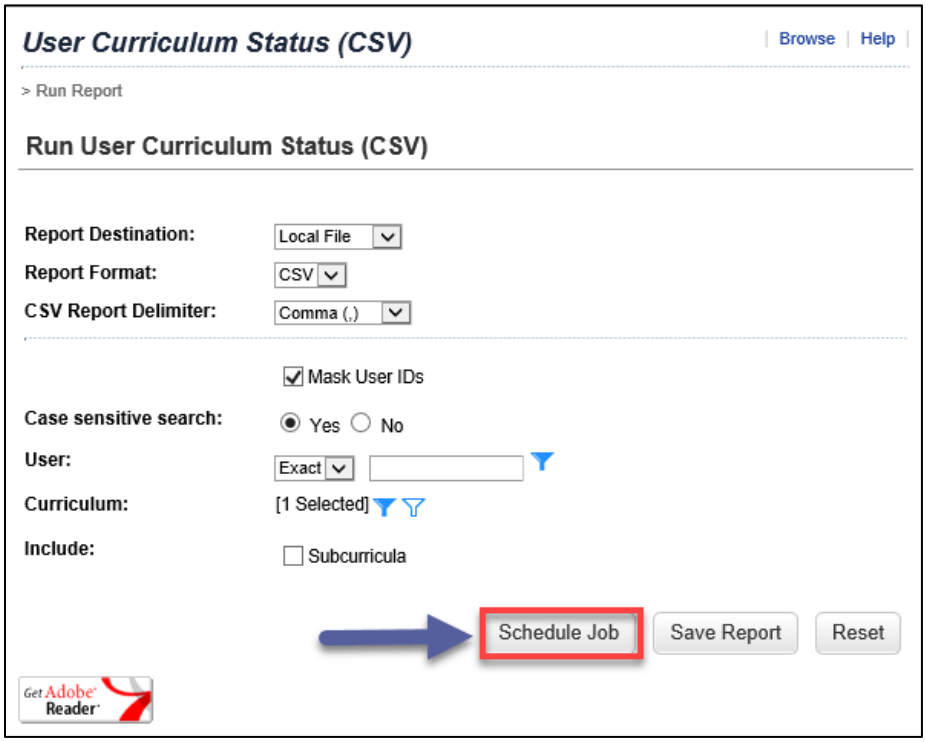



iii. Click **Submit Filter** at the top of the screen to return to the Curriculum Status report.

g. **Include**: Select the "Subcurricula" box if you also wish to report on associated curricula.




5. Once all criteria have been entered, click **Schedule Job**.

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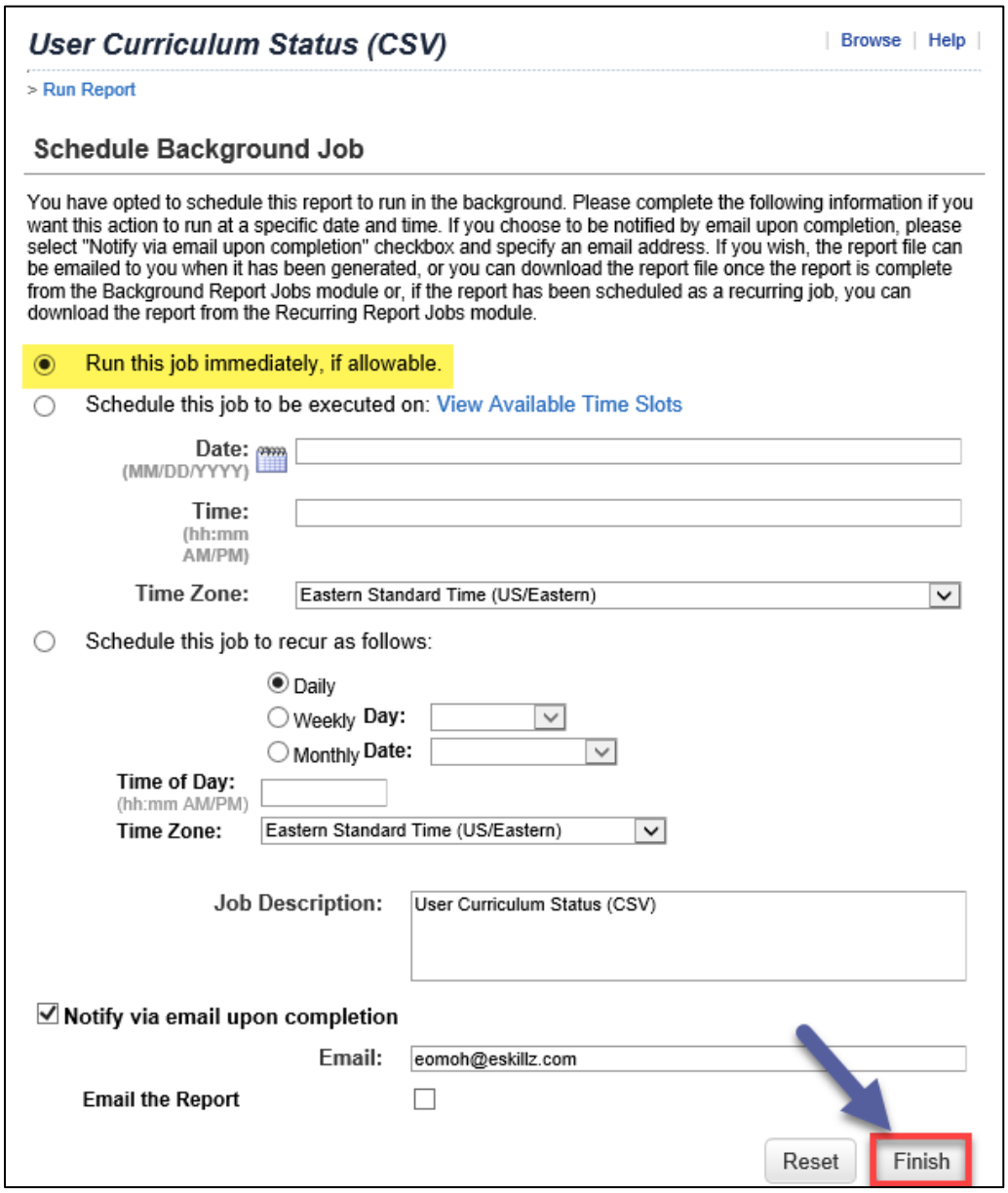
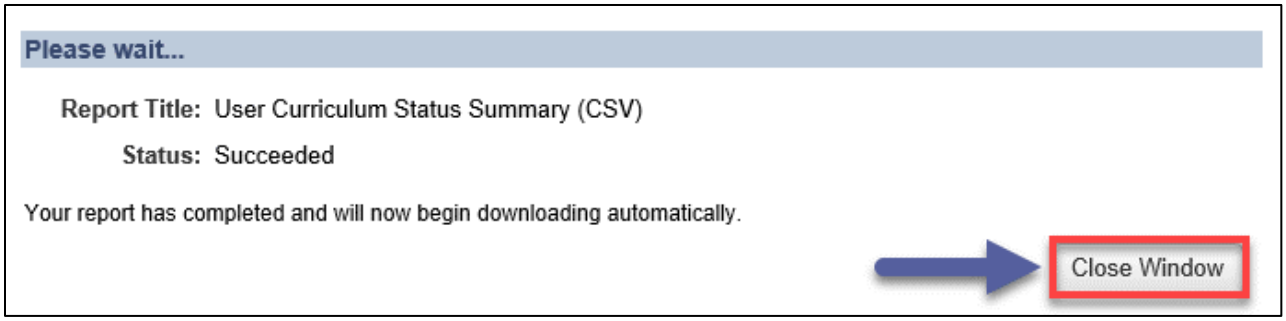
6. Select *Run this job immediately, if allowable*, then click **Finish** to run the report.




7. You have successfully run your Curriculum Status report! Click **Close Window**.

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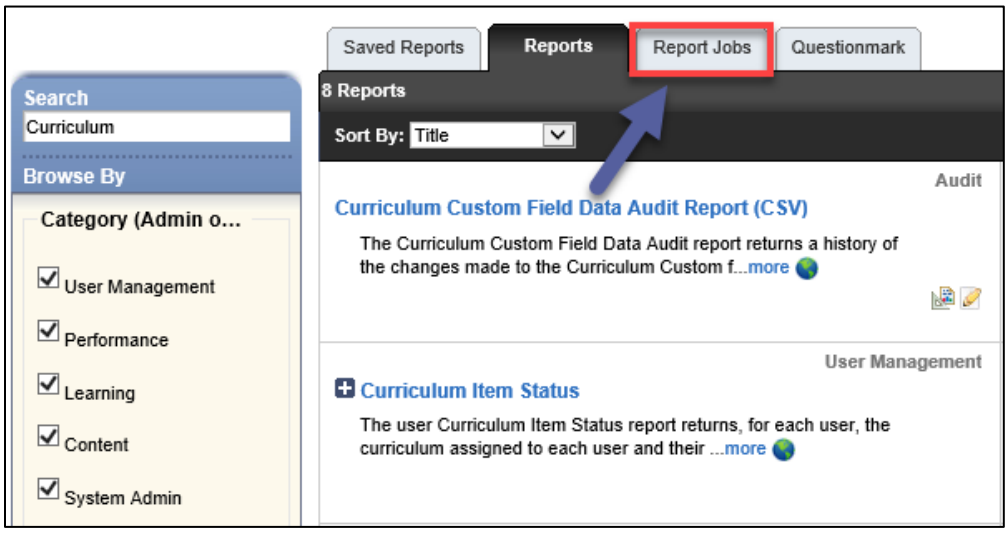
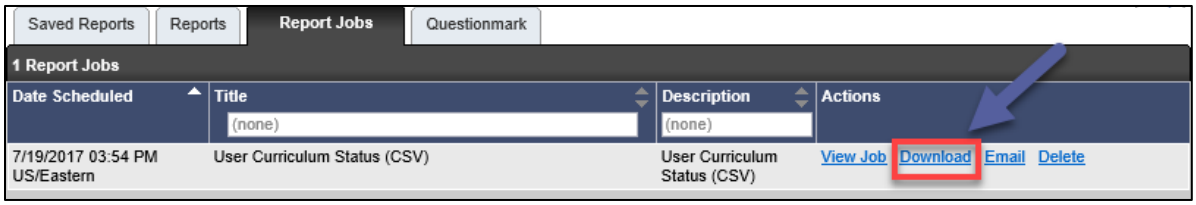
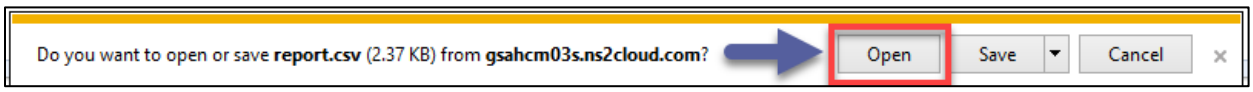
8. From the Reports page, click on **Report Jobs**.




9. Locate your desired report and click on **Download** to download the report.




10. Utilize your browser's setting to open the report.

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