GSA ONLINE UNIVERSITY

GSA LMSJOB AID SERIES

Getting started: GSA ONLINE UNIVERSITY

Program 102 Job Aid

Program 102 Job Aid Overview

This job aid is a continuation of the items discussed in the Program 101 job aid. The Program 102 job aid provides step-by-step instructions for tasks relevant to program 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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Program 102 Job Aid

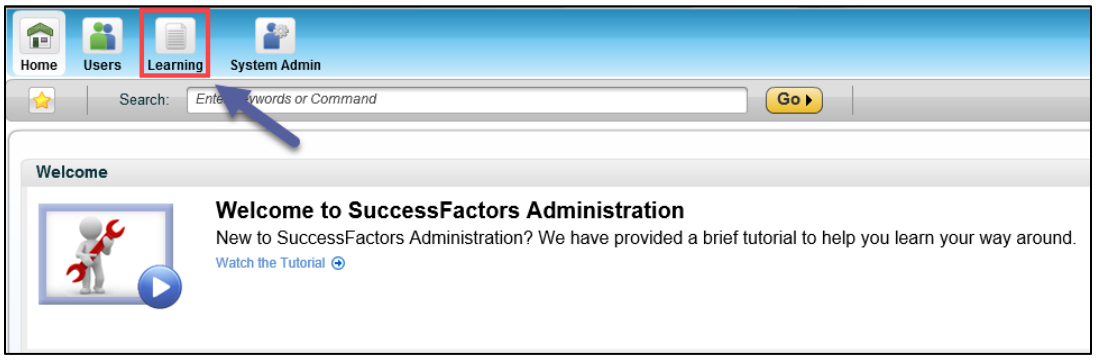
USER MANAGEMENT

Assign Program

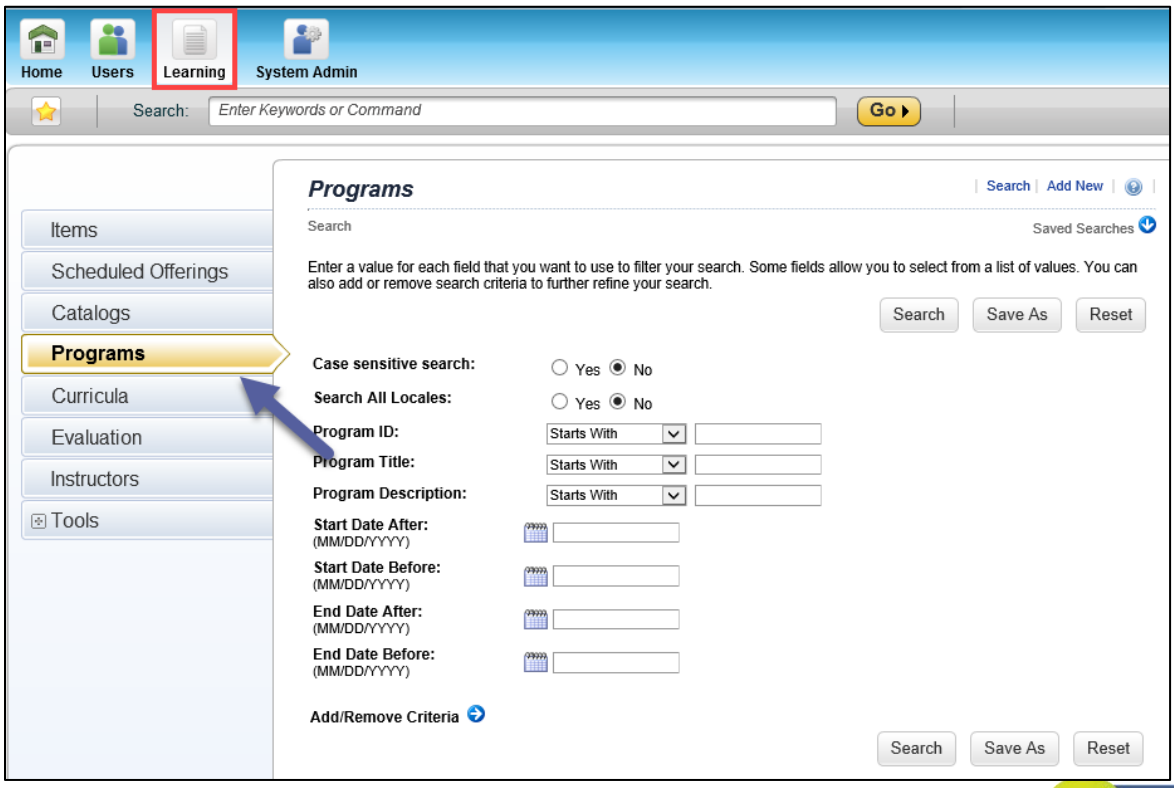
Programs are learning "containers" that can house a series of learning activities such as items, links, and virtual sessions. Programs can be assigned to users using two different methods: ***via Program Administration Page*** or ***via User Needs Management Page.***

Via Program Administration Page

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



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



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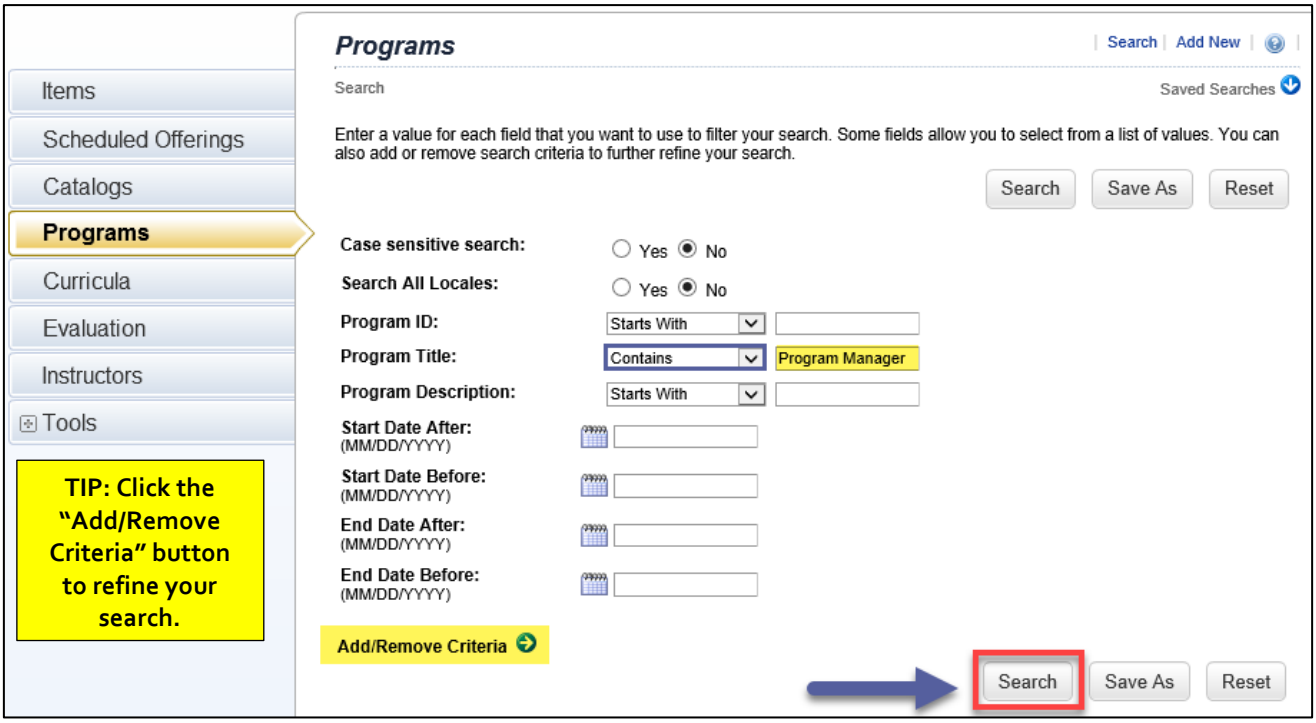
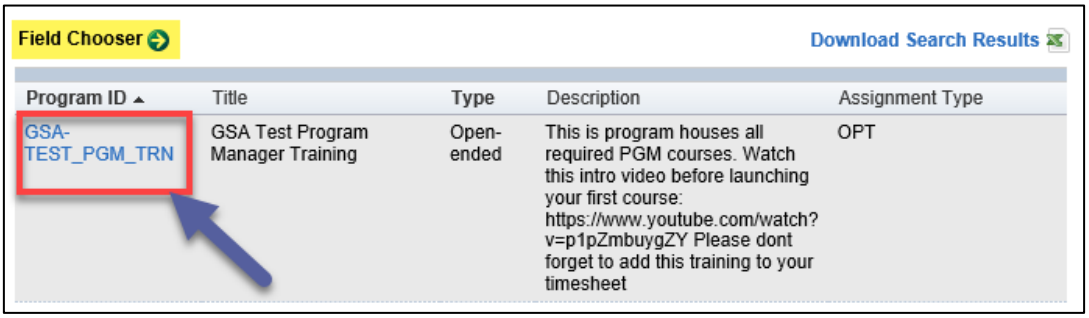
3. Enter the *Title* of your desired program. You can use the drop-down menu associated with most criteria to refine your search (ex: "starts with" vs. "contains"). Click **Search** to search for your desired program**.**



4. Locate your desired program. Click on the *Program ID* to select and open the program.



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

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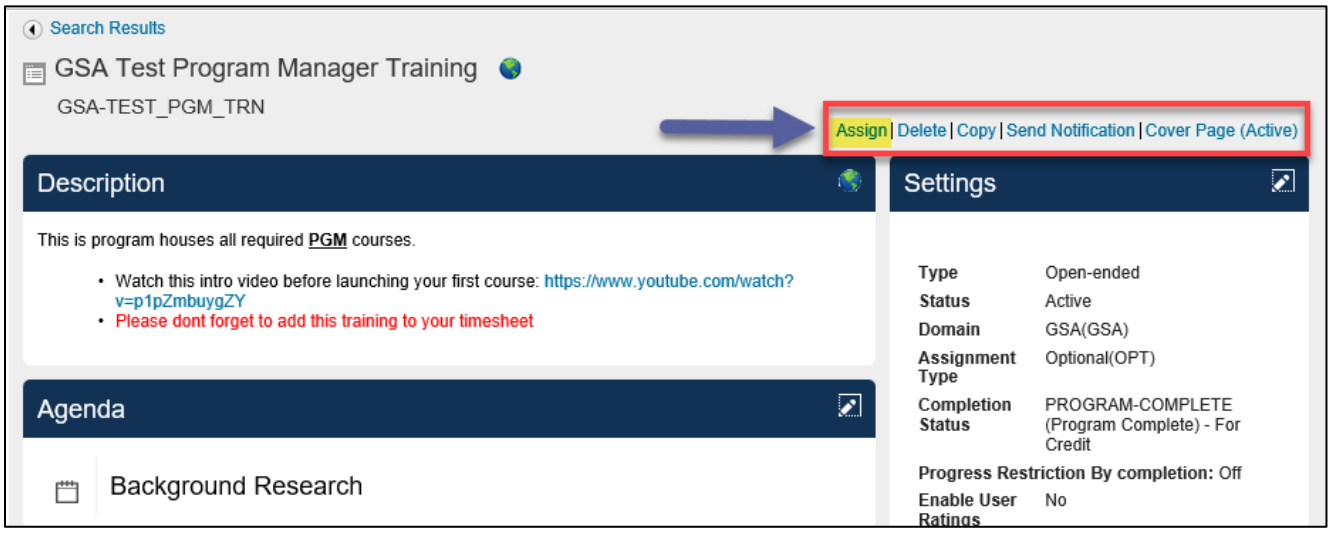
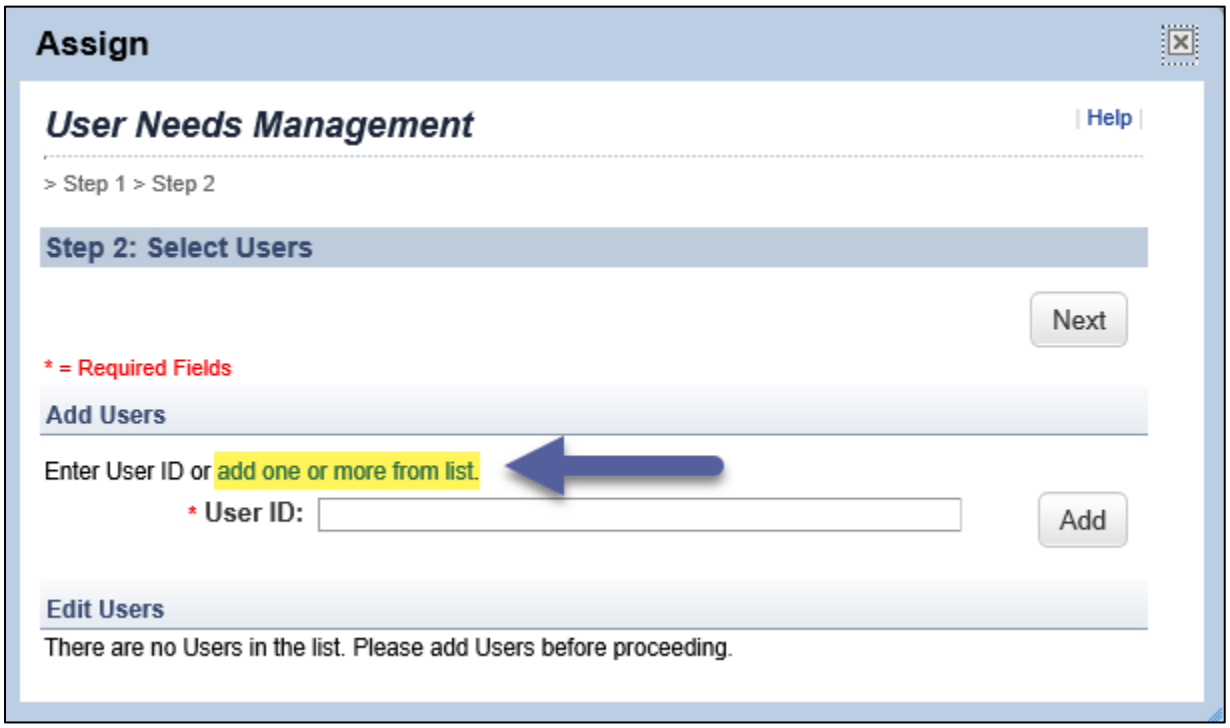
5. On the Program Administration Page, locate the Actions Menu and click **Assign**. This will take you to the User Needs Management Page.



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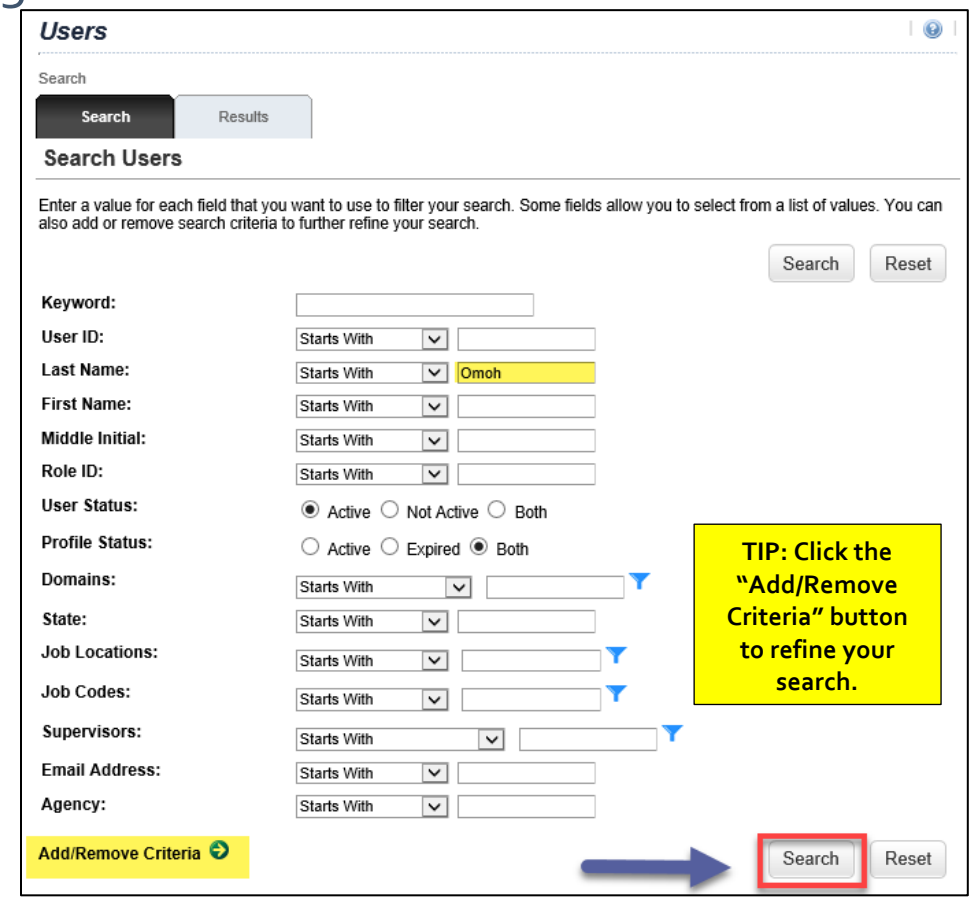
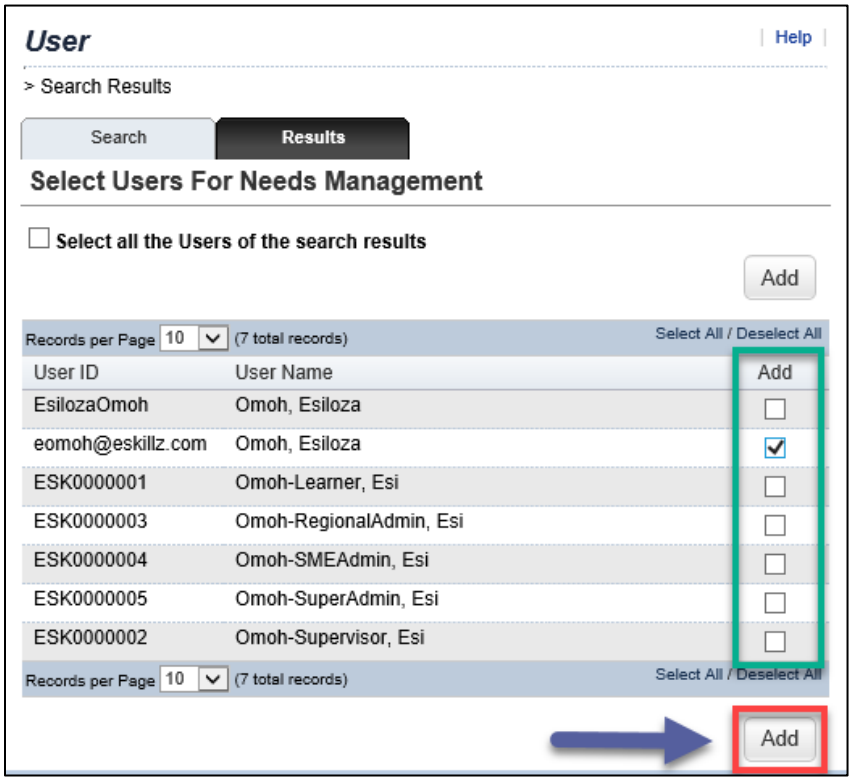


8. Select your desired user(s). Click **Add** to select the user(s) and return to the User Needs Management page.



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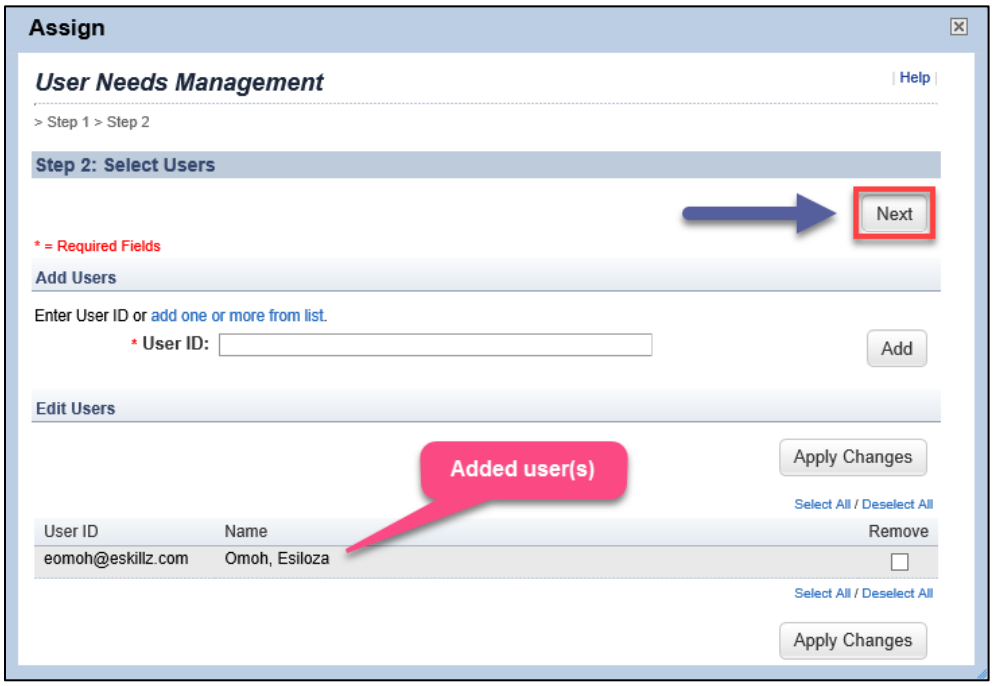
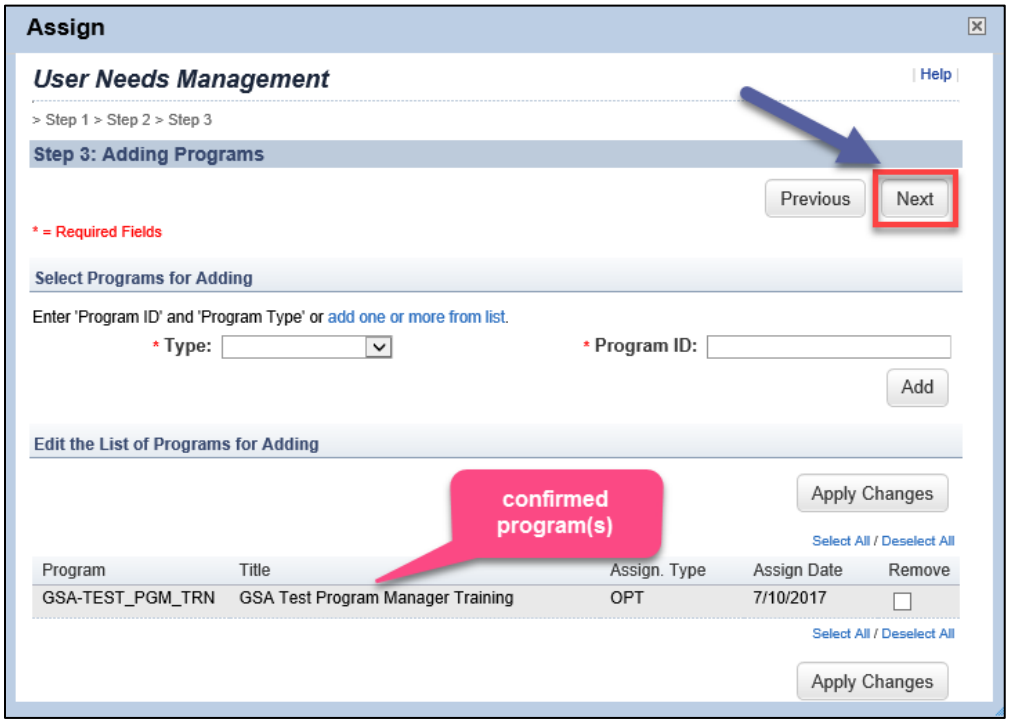
9. Repeat steps 6 – 8 to add more users. Once you have added all desired users, click **Next** to advance to the next step.



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



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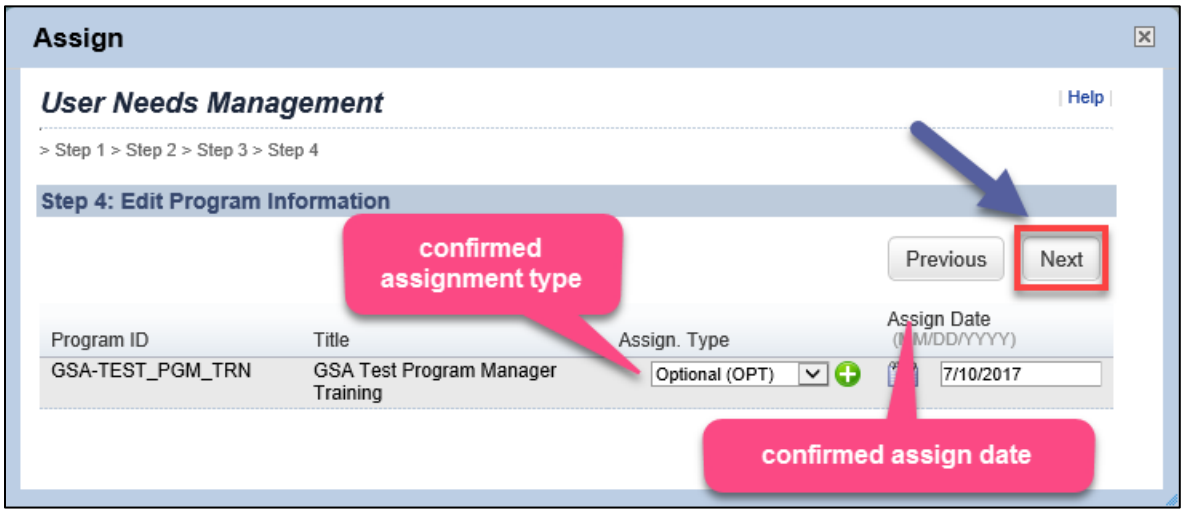
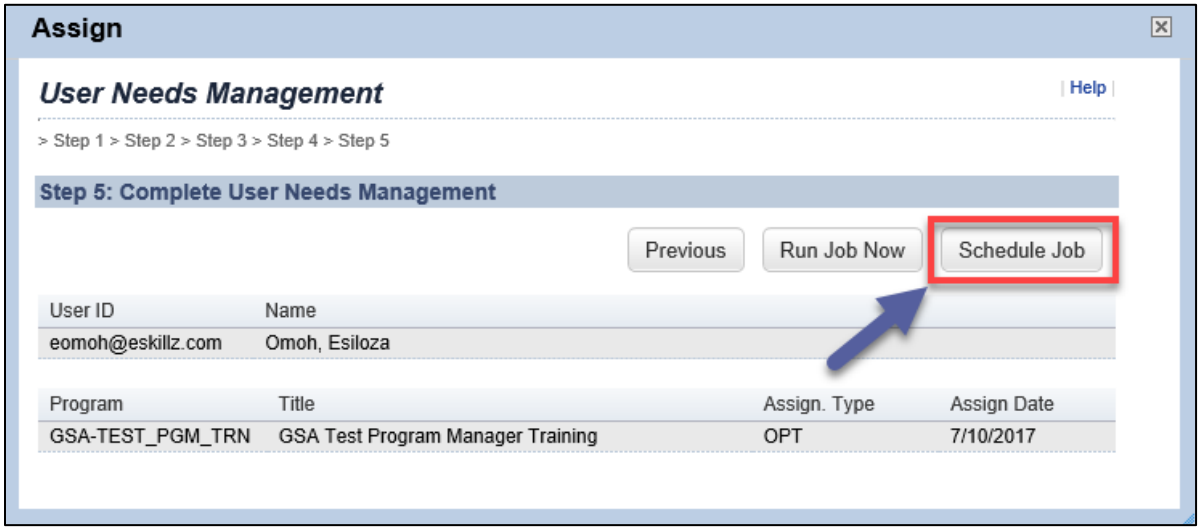
11. Edit (if needed) and confirm the program assignment type and assigned date for the selected users. Click **Next** to advance to the next step.



12. Click **Schedule Job**.



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

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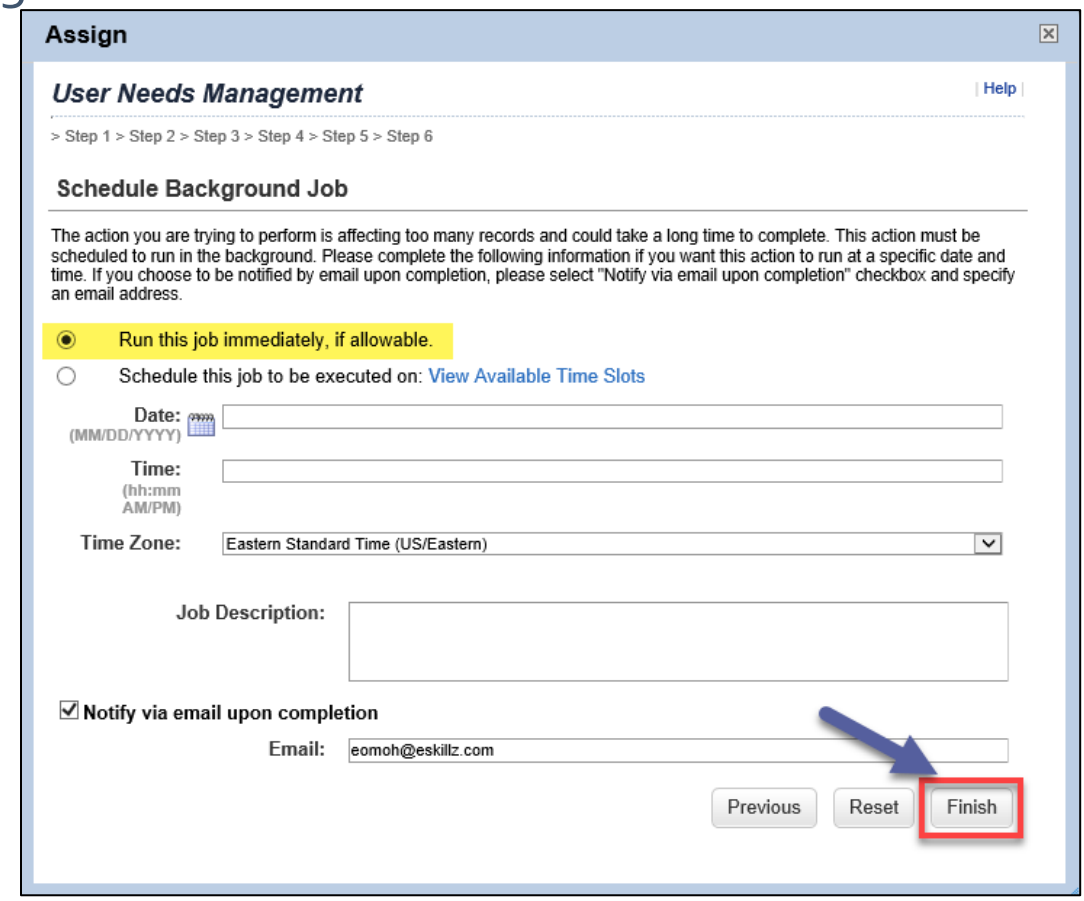
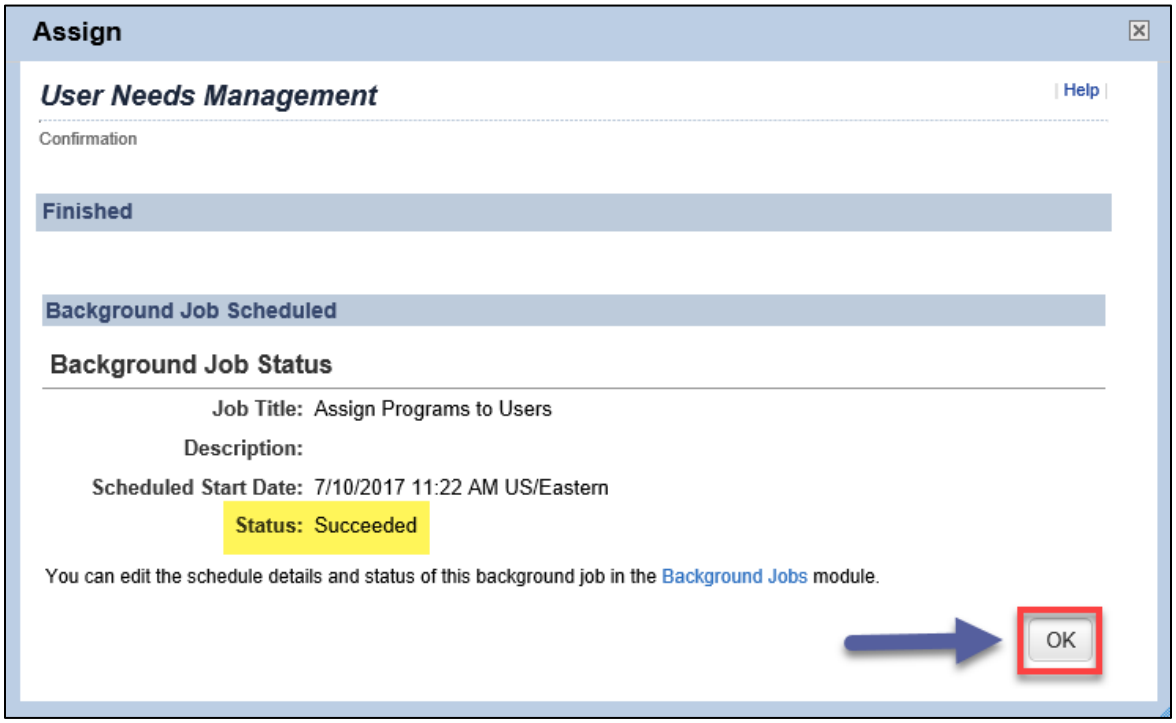


14. You have successfully assigned the program! Click **OK** to return to the Program Administration Page.



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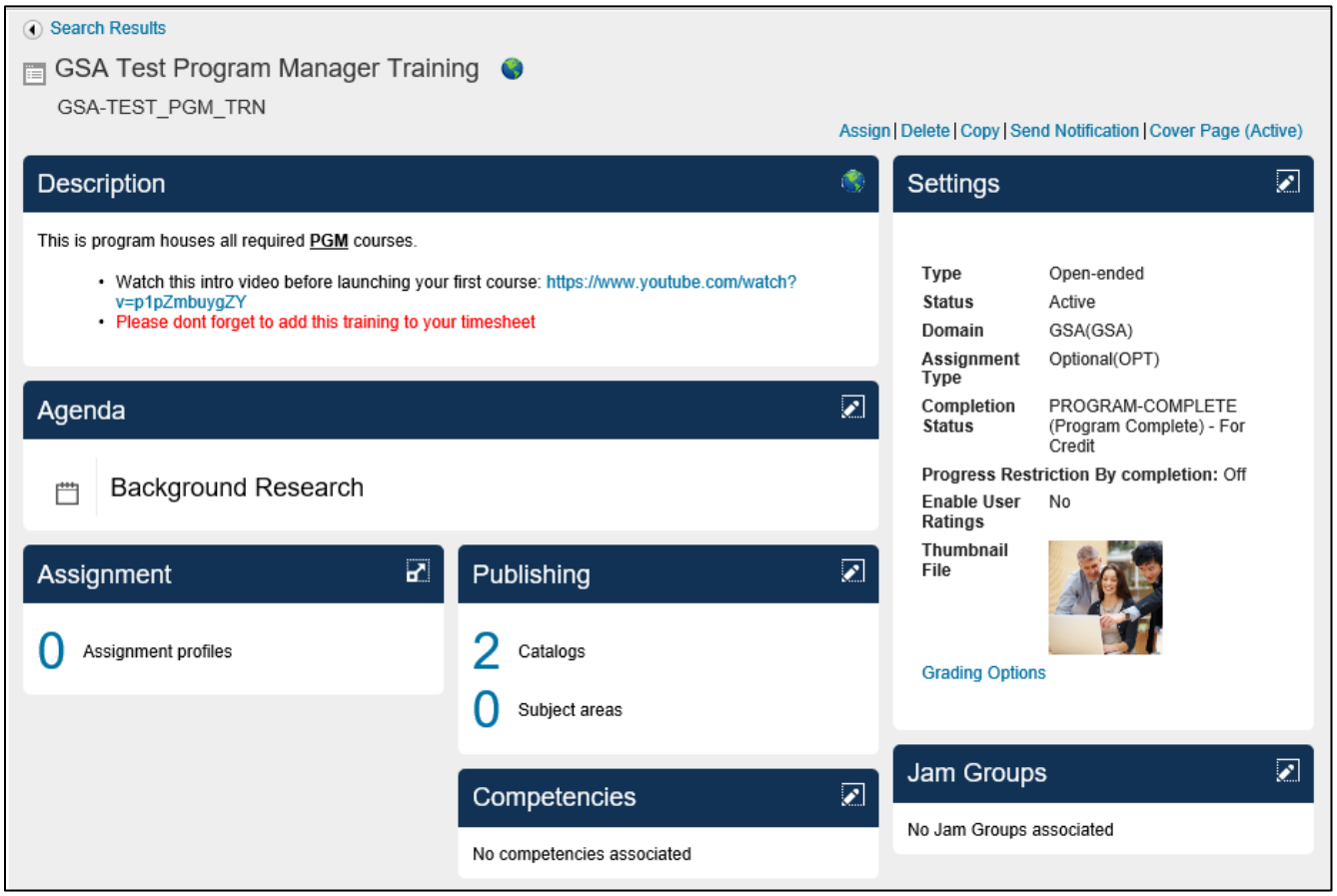
15. Once you are back to the Program Administration Page, you can perform additional administrative tasks related to your program or exit the page.



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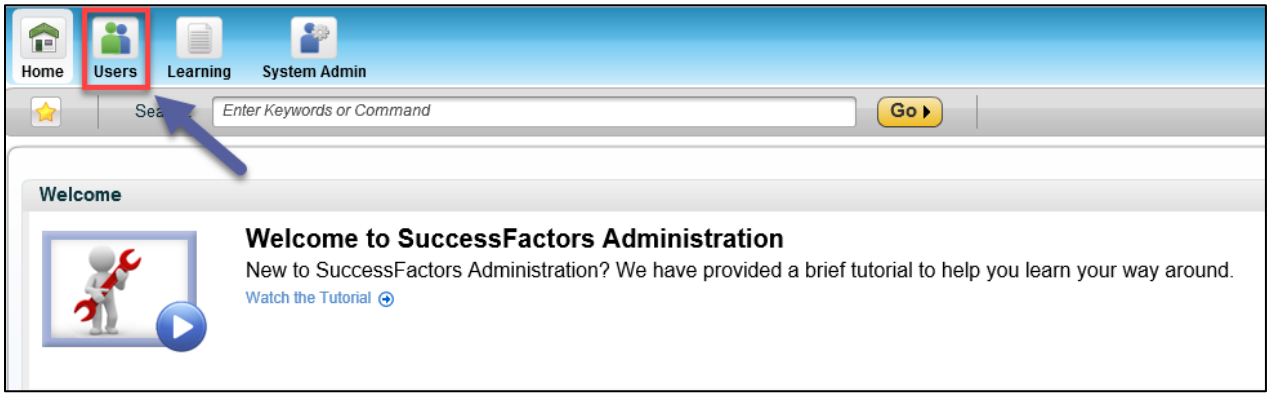
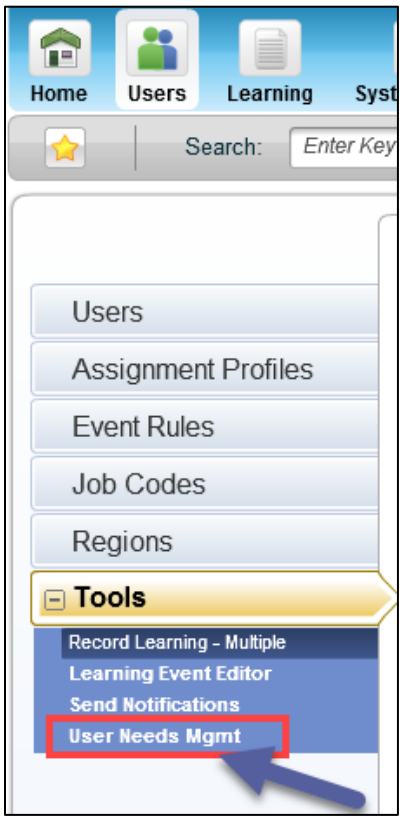
Assign Program

Via User Needs Management Page

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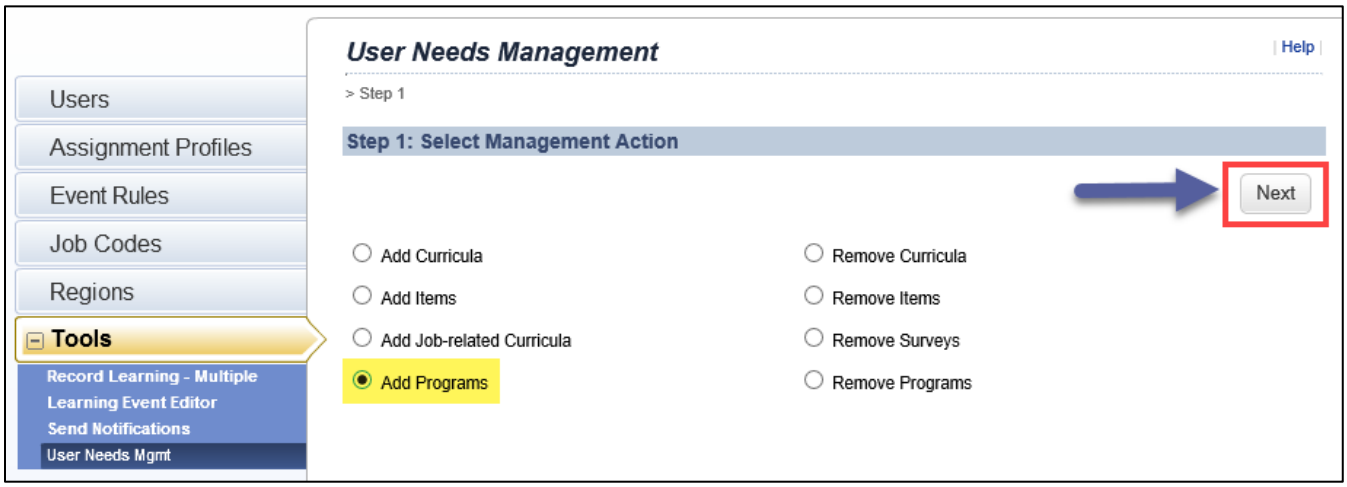
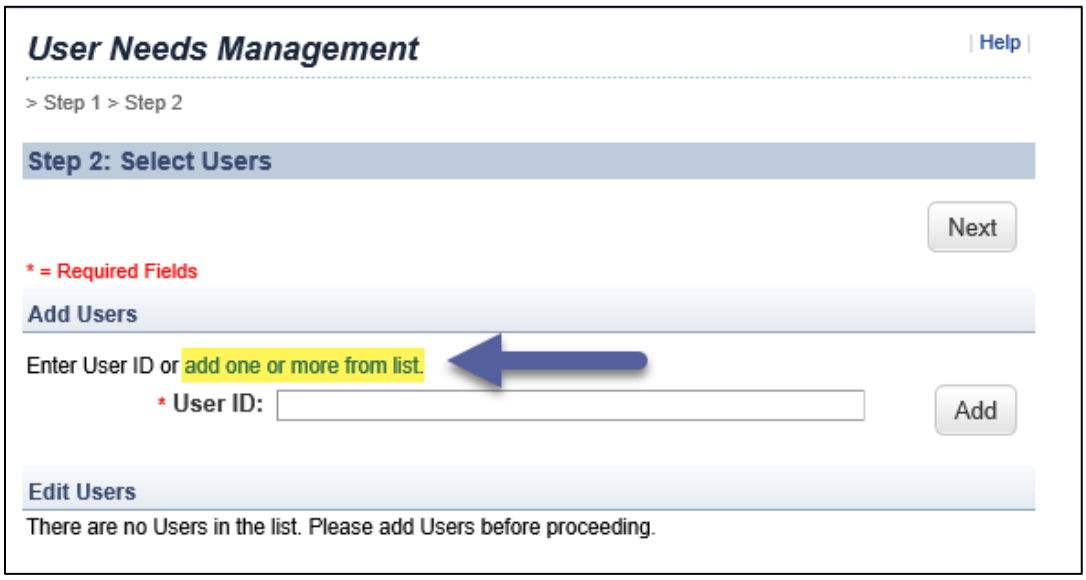
3. On the User Needs Management Page, select *Add Programs* as the management action you want to perform. Click **Next** to advance to the next step.



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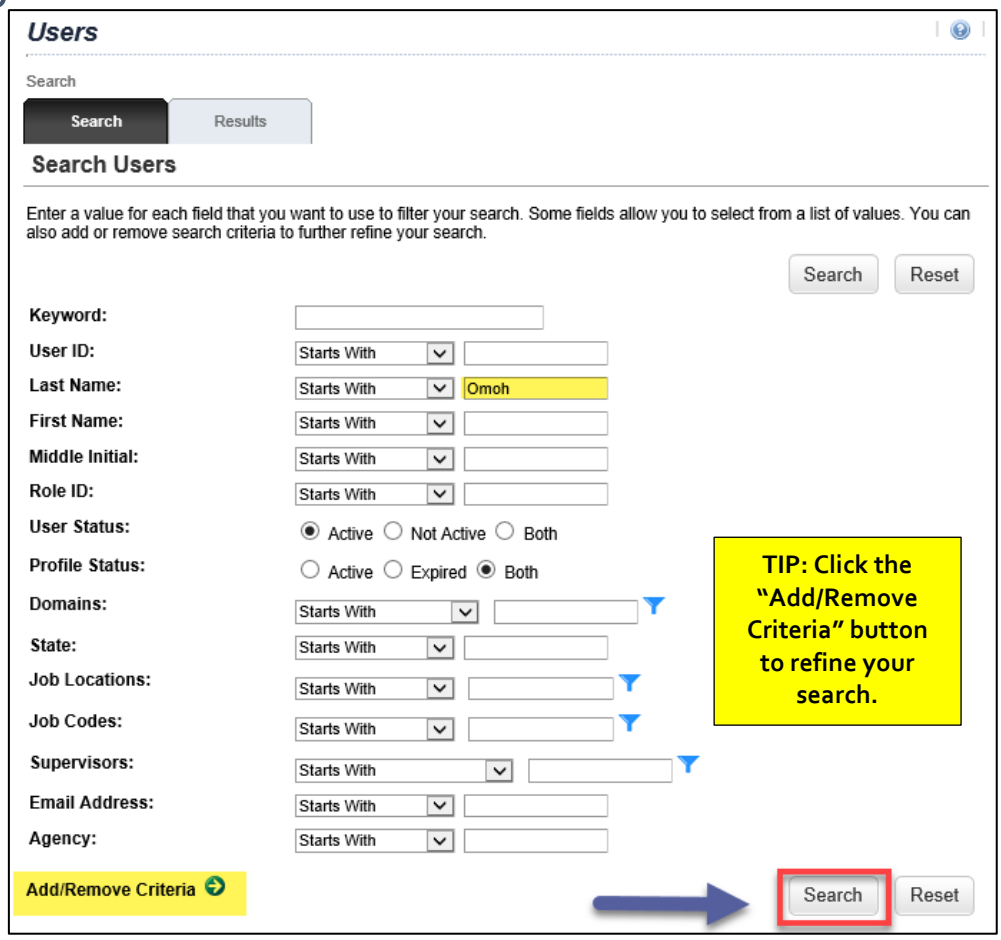
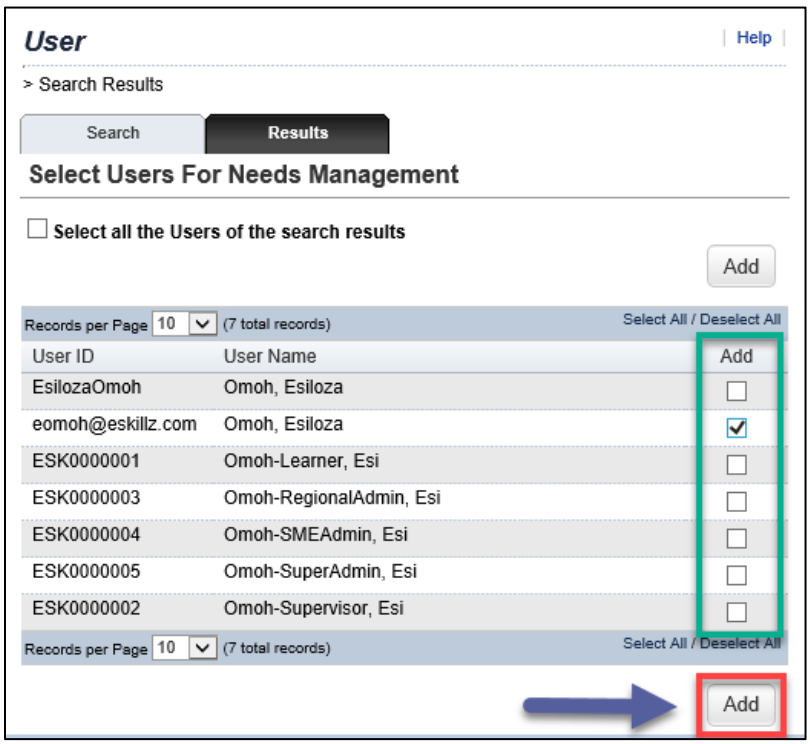


6. Select your desired user(s). Click **Add** to select the user(s) and return to the User Needs Management page.



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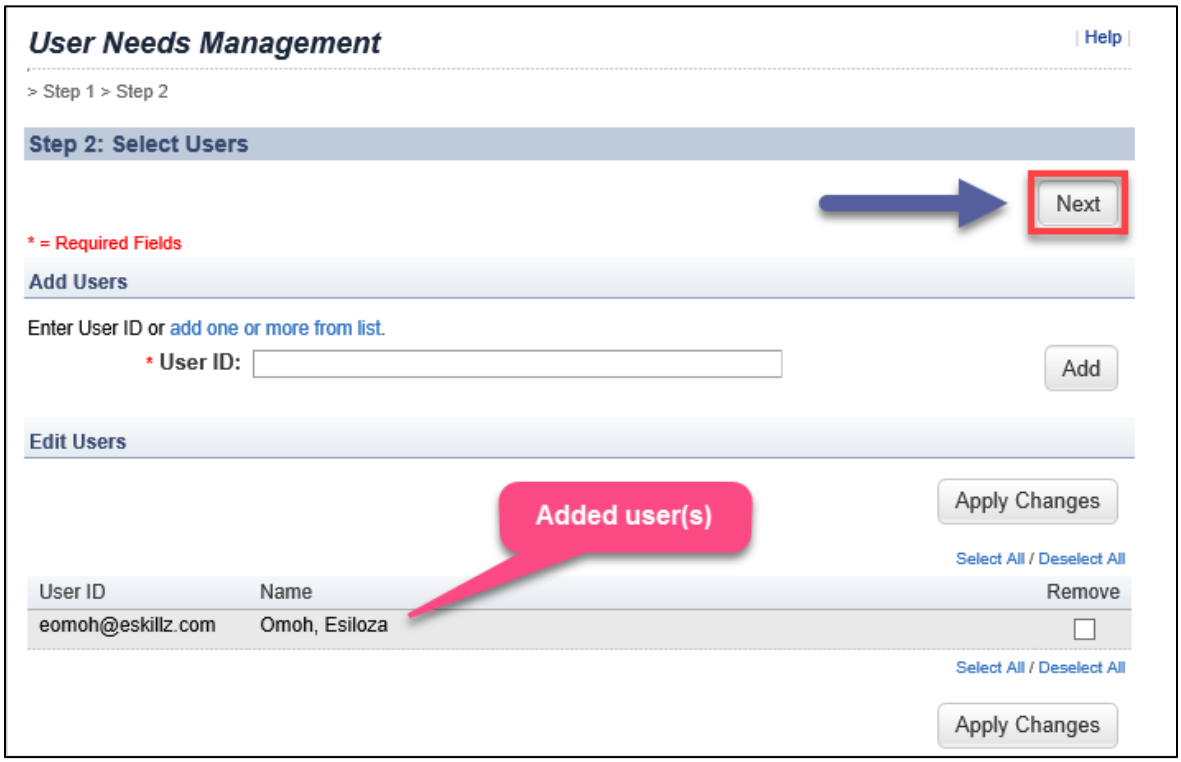
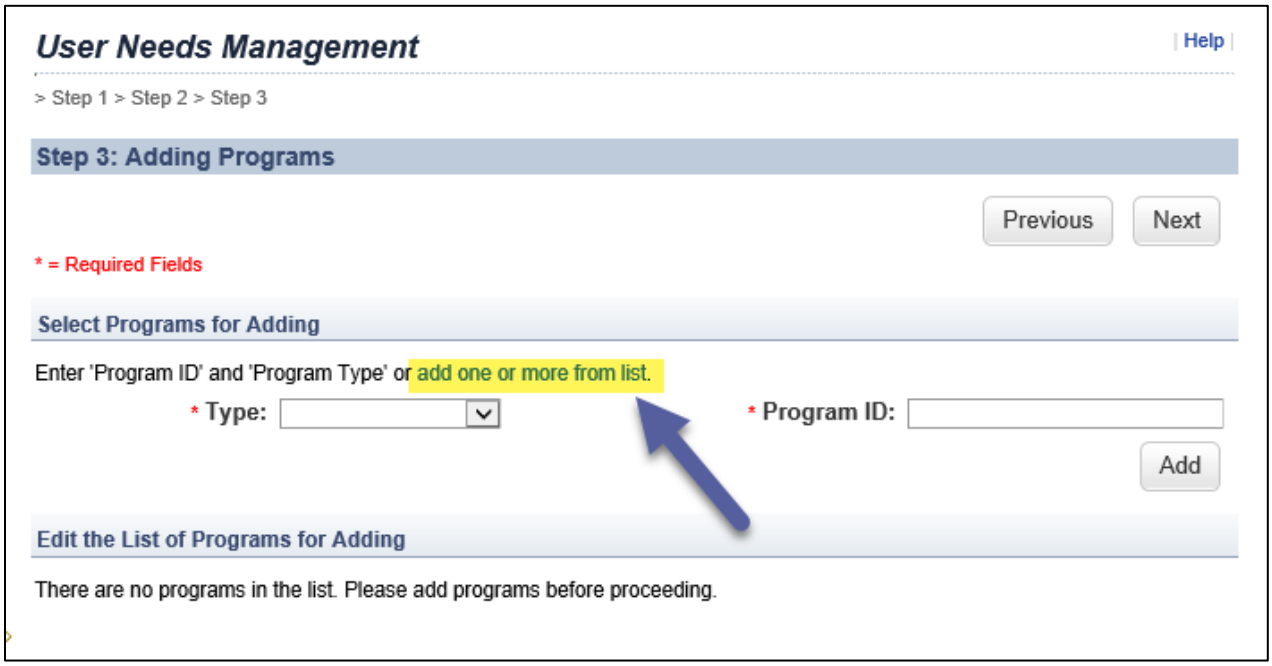
7. Repeat steps 4 – 6 to add more users (if needed). Once you have added all desired users, click **Next** to advance to the next step.



8. Click on **add one or more from list** to select your desired program(s) to assign.



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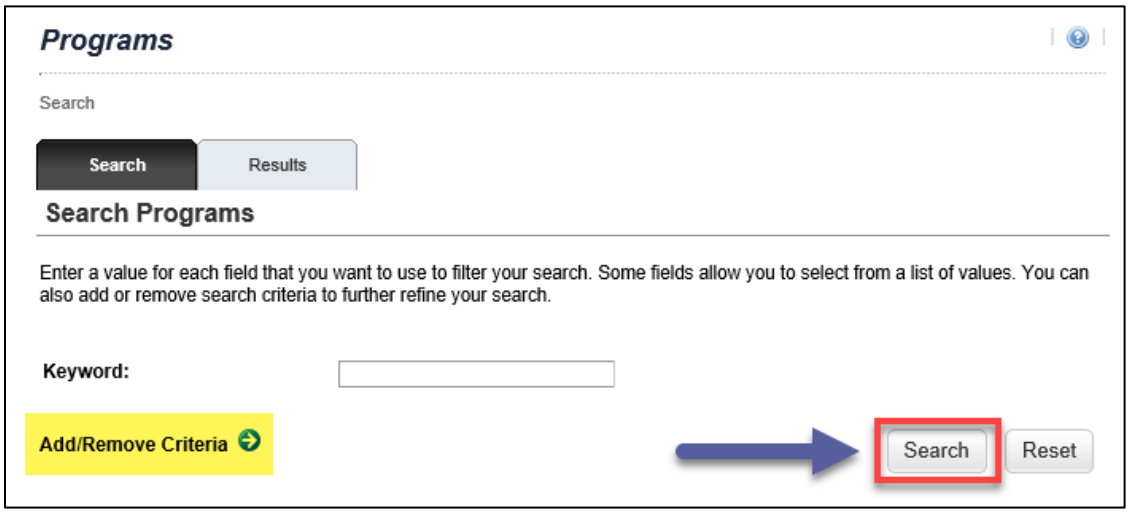
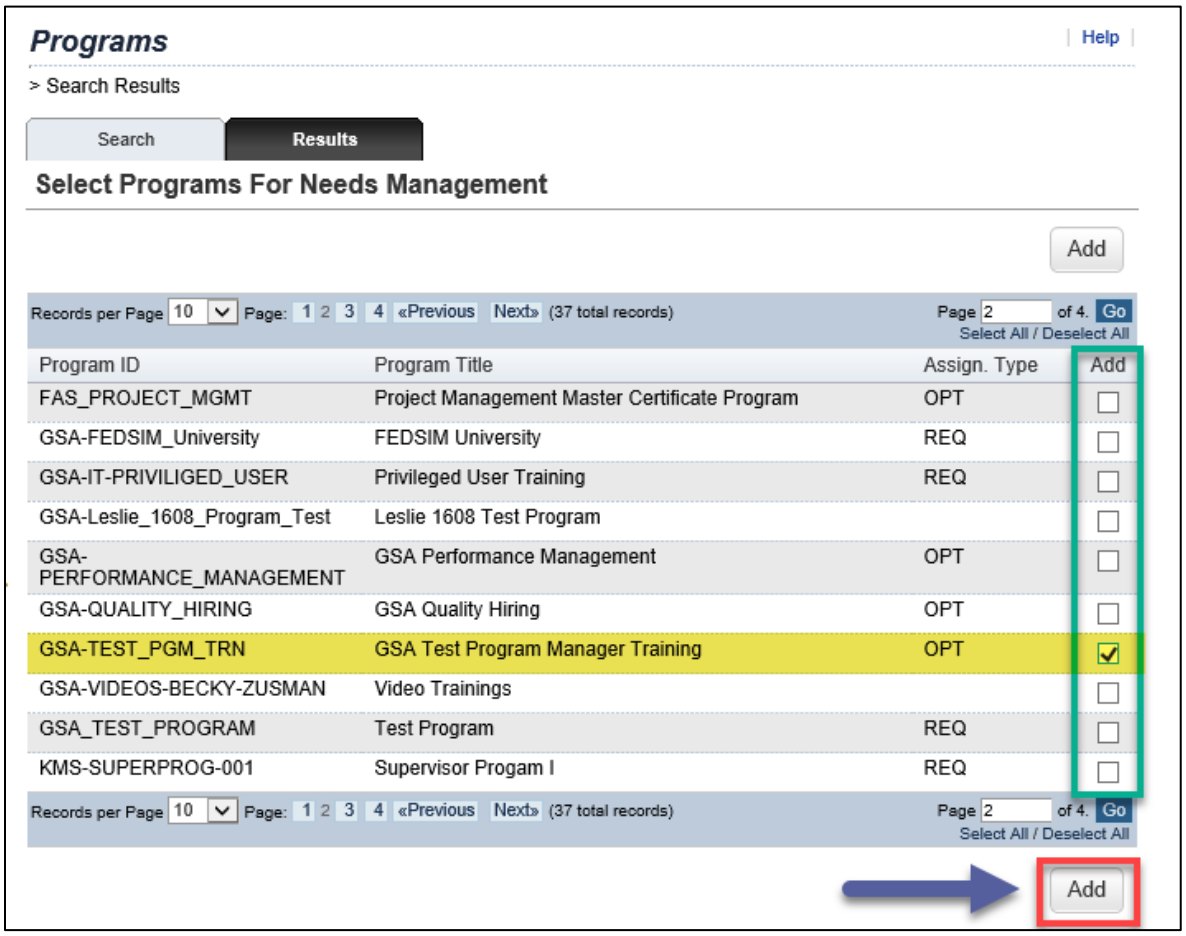
9. Enter a keyword associated with the program **<u>or leave blank</u>** to search all programs in the system. Click **Search** to find your desired program.



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



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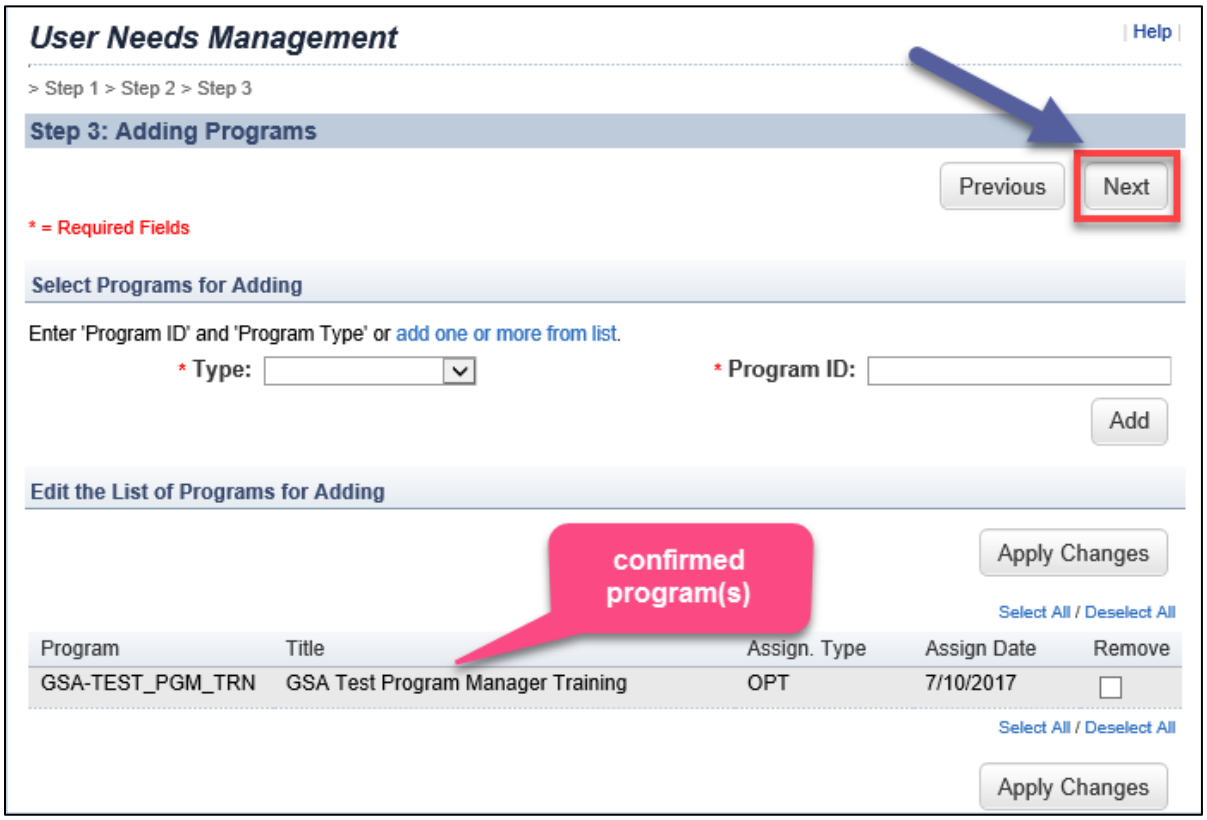
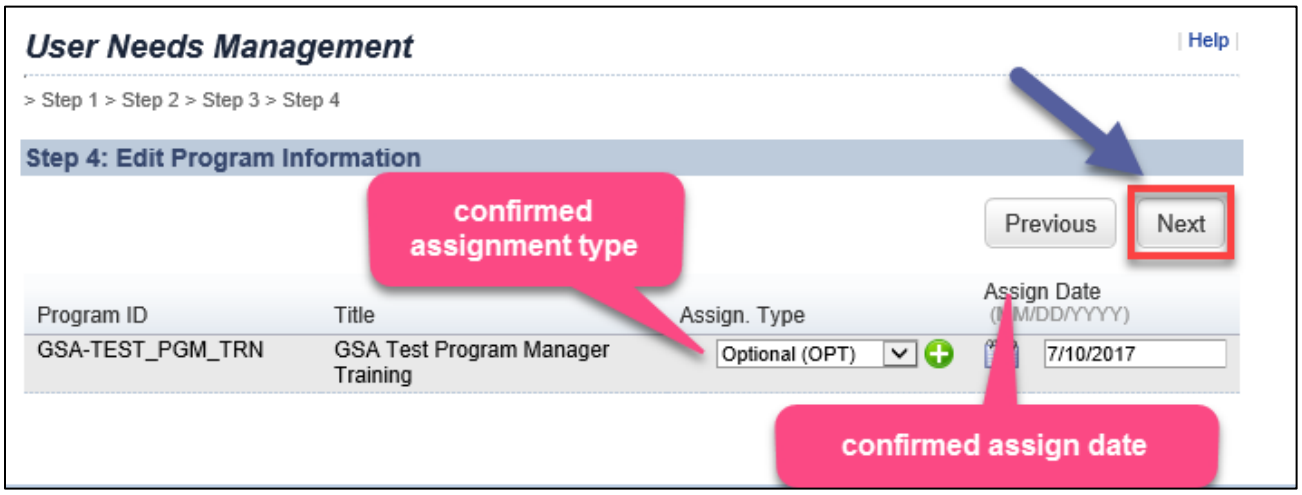
11. Repeat steps 8 – 10 to add more programs (if needed). Confirm the program(s) to be assigned. Click **Next** to advance to the next step.



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



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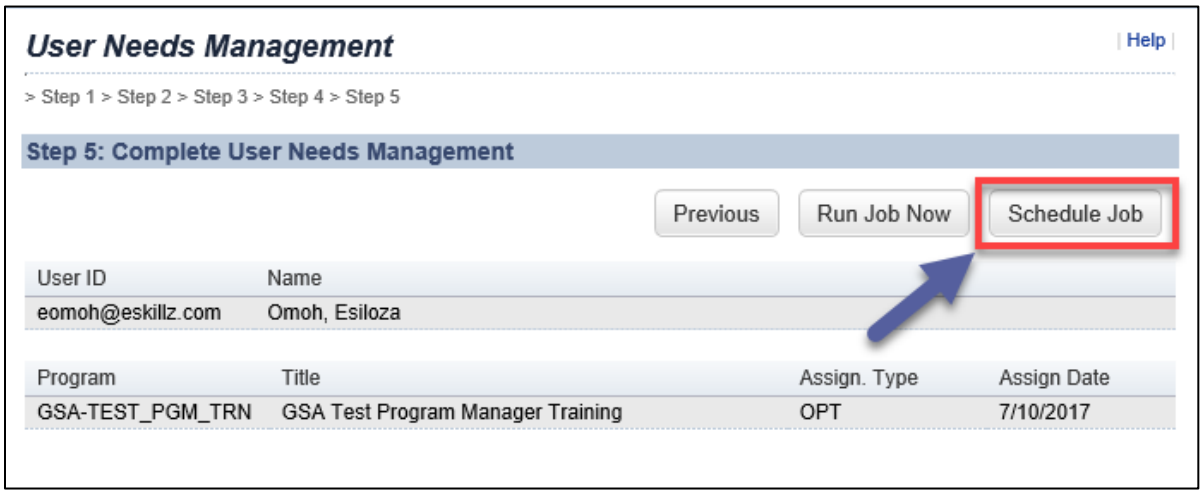
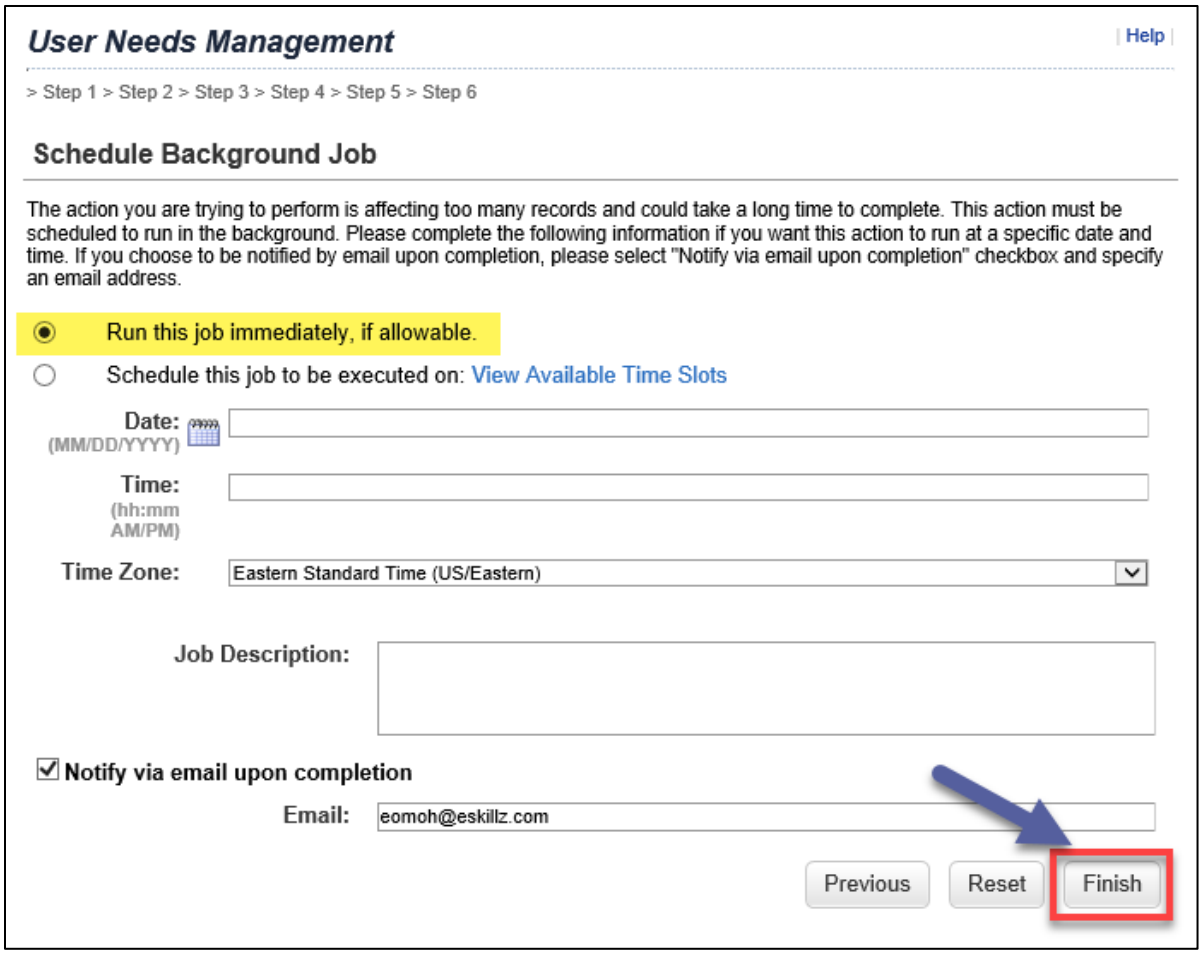
13. Click **Schedule Job**.



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



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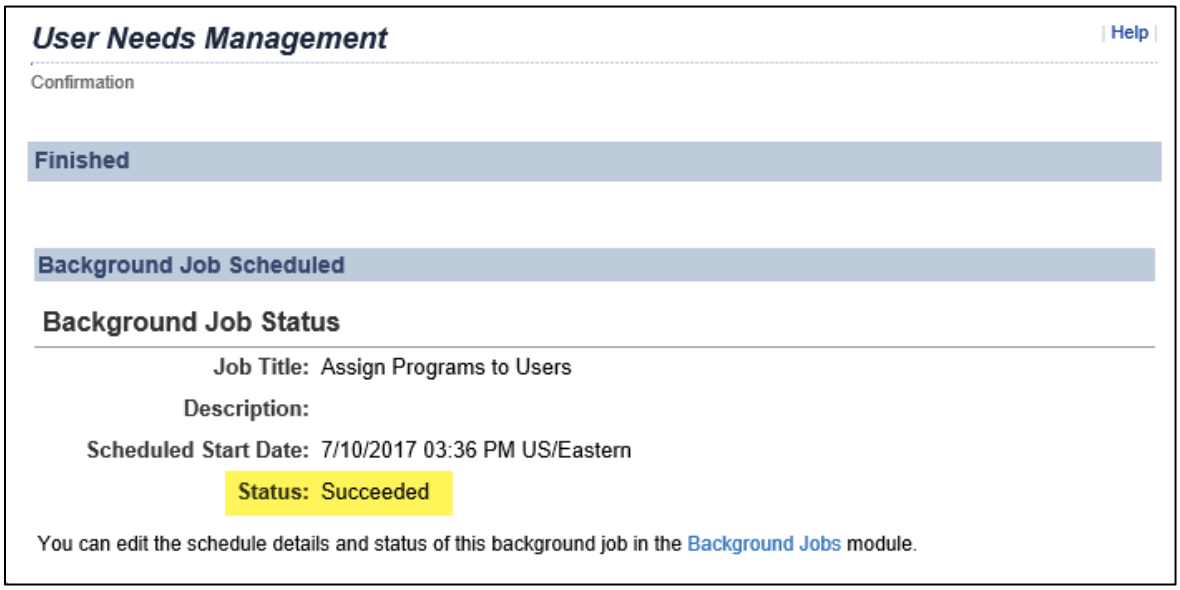
15. You have successfully assigned the program!



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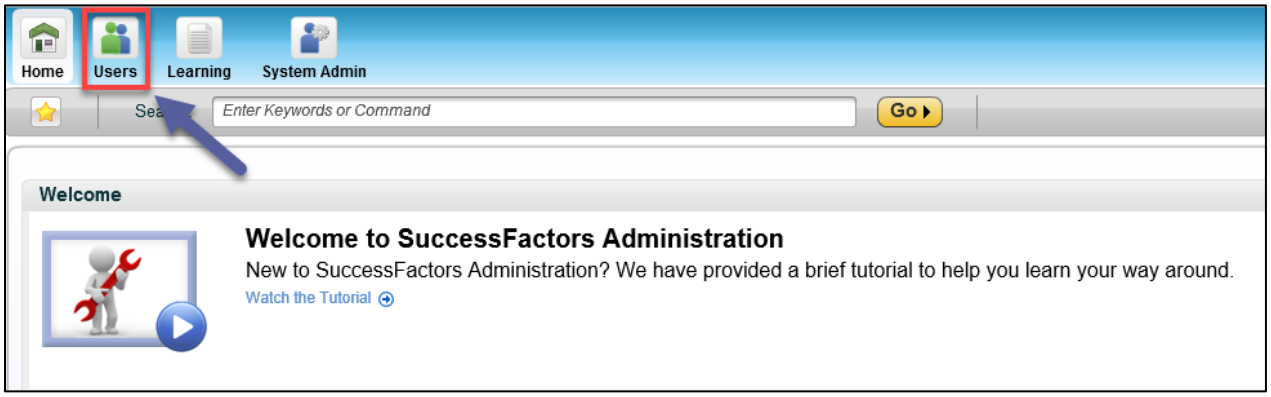
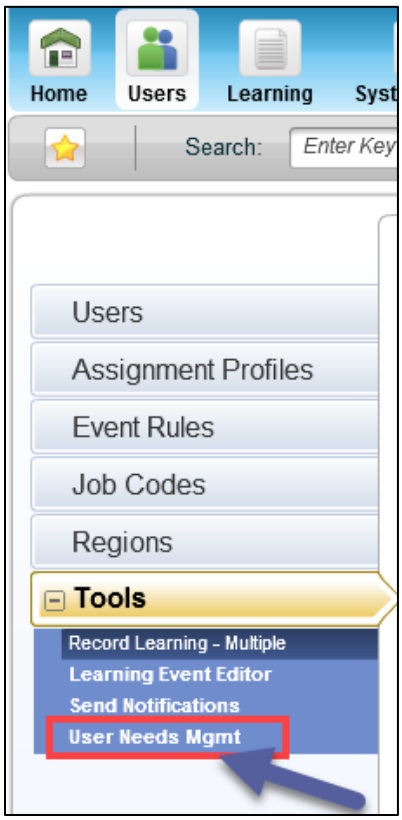
Remove Program

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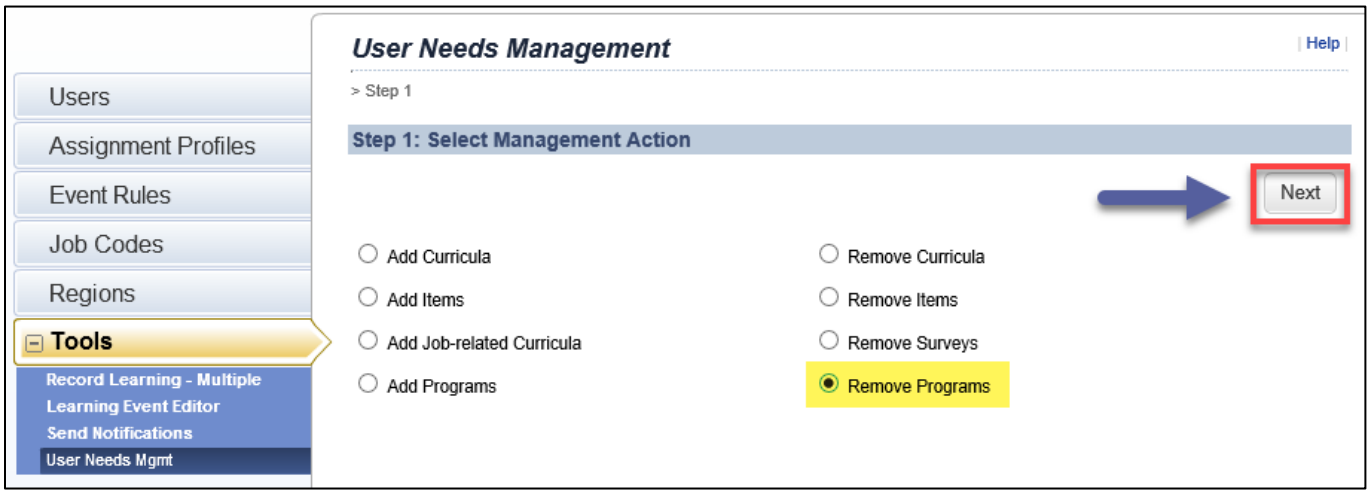
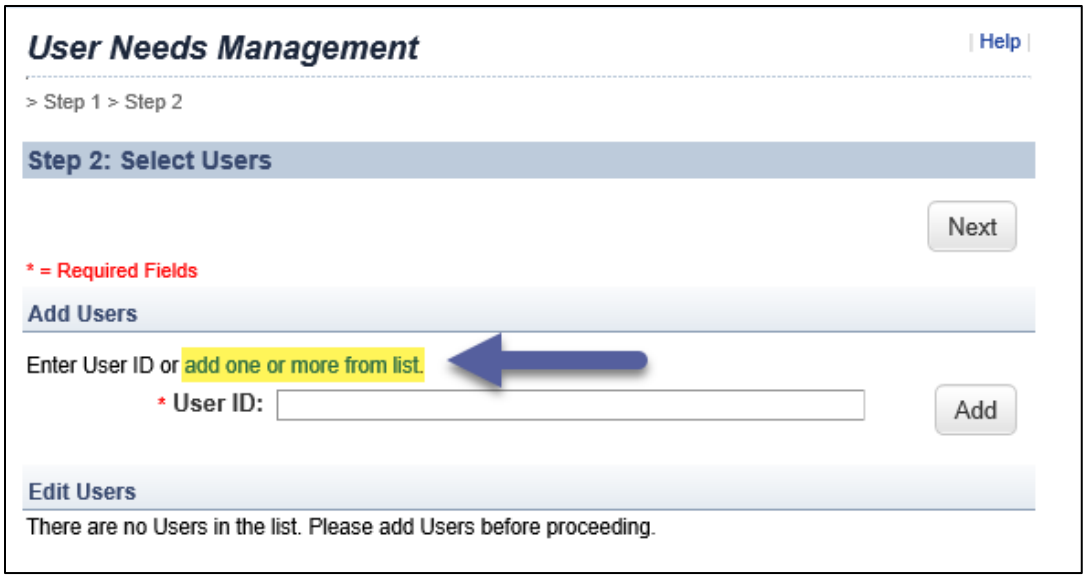
3. On the User Needs Management Page, select *Remove Programs* as the management action you want to perform. Click **Next** to advance to the next step.



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



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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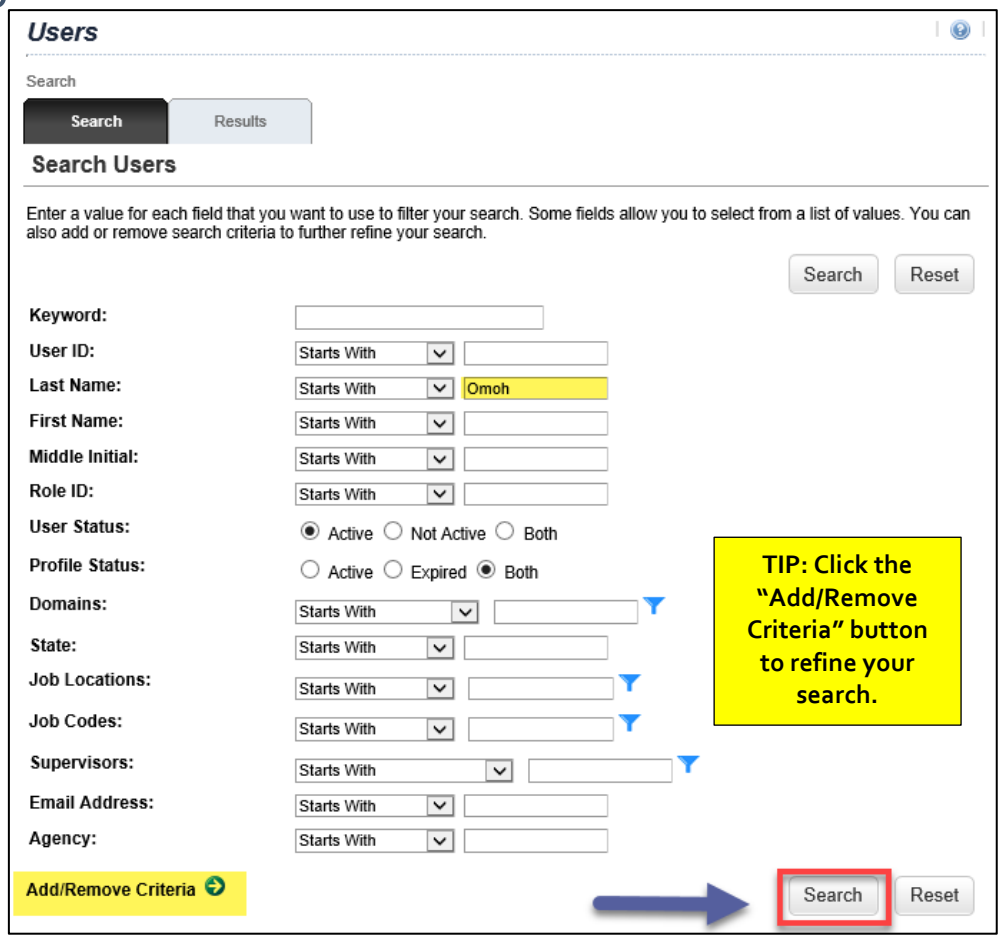
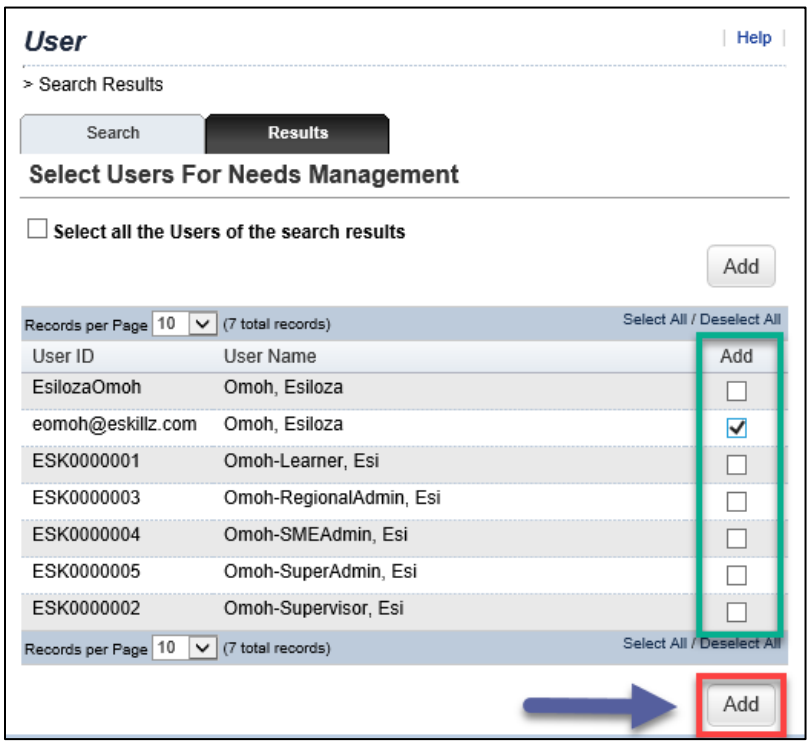


6. Select your desired user(s). Click **Add** to select the user(s) and return to the User Needs Management page.



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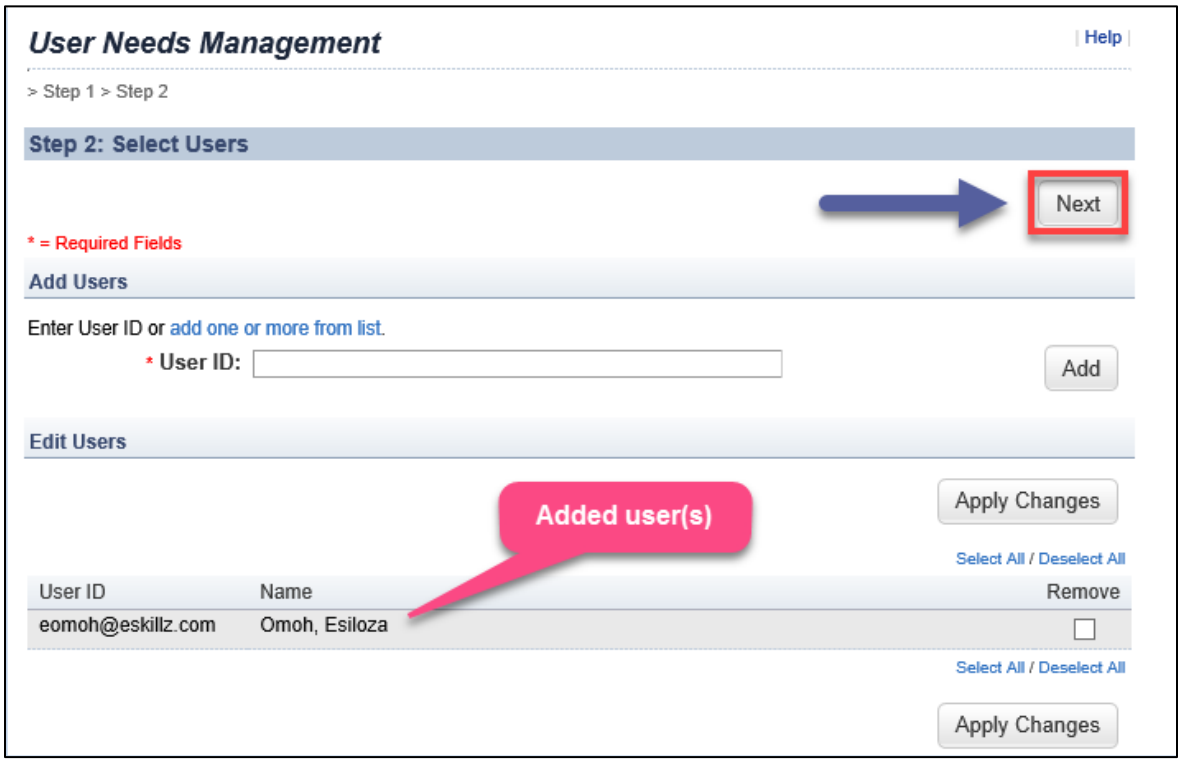
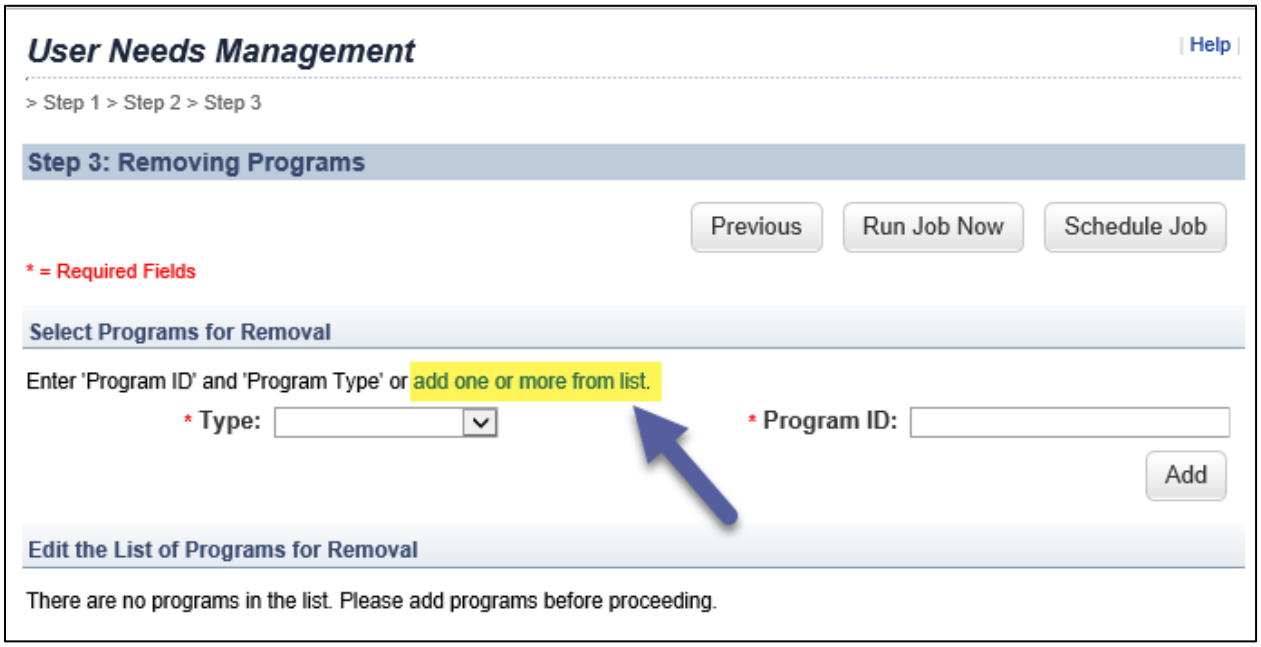
7. Repeat steps 4 – 6 to add more users (if needed). Once you have added all desired users, click **Next** to advance to the next step.



8. Click on **add one or more from list** to select your desired program(s) to remove.



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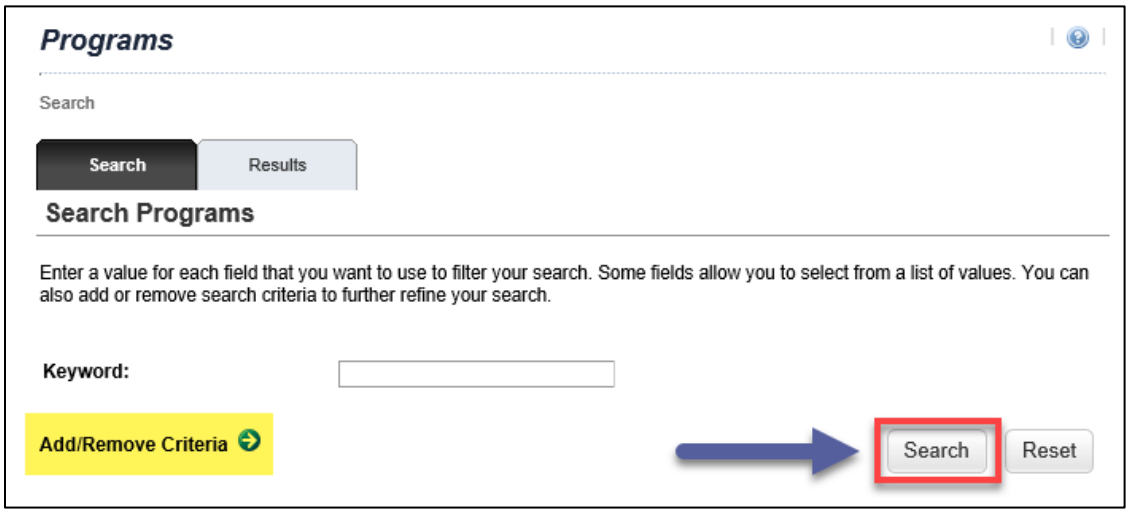
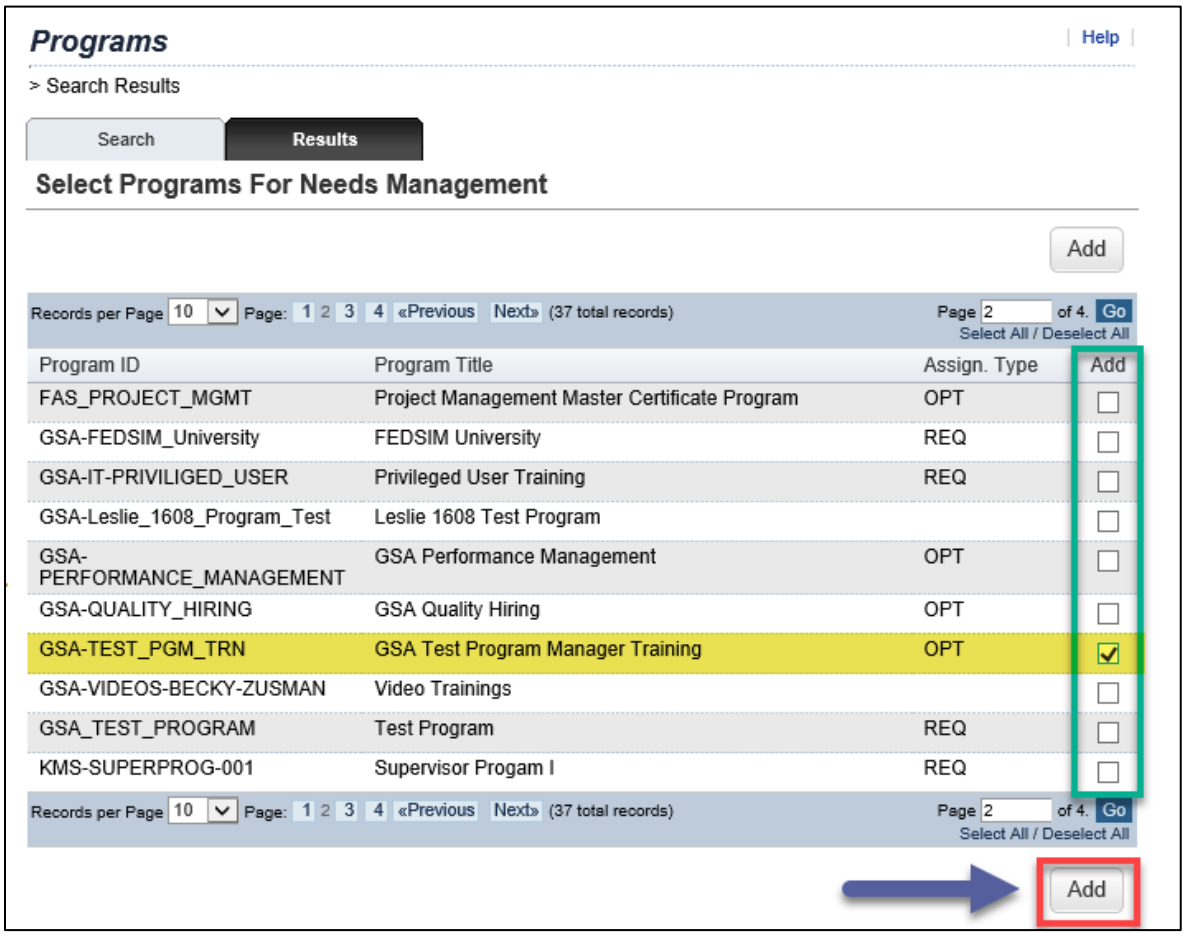
9. Enter a keyword associated with the program **<u>or leave blank</u>** to search all programs in the system. Click **Search** to find your desired program.



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



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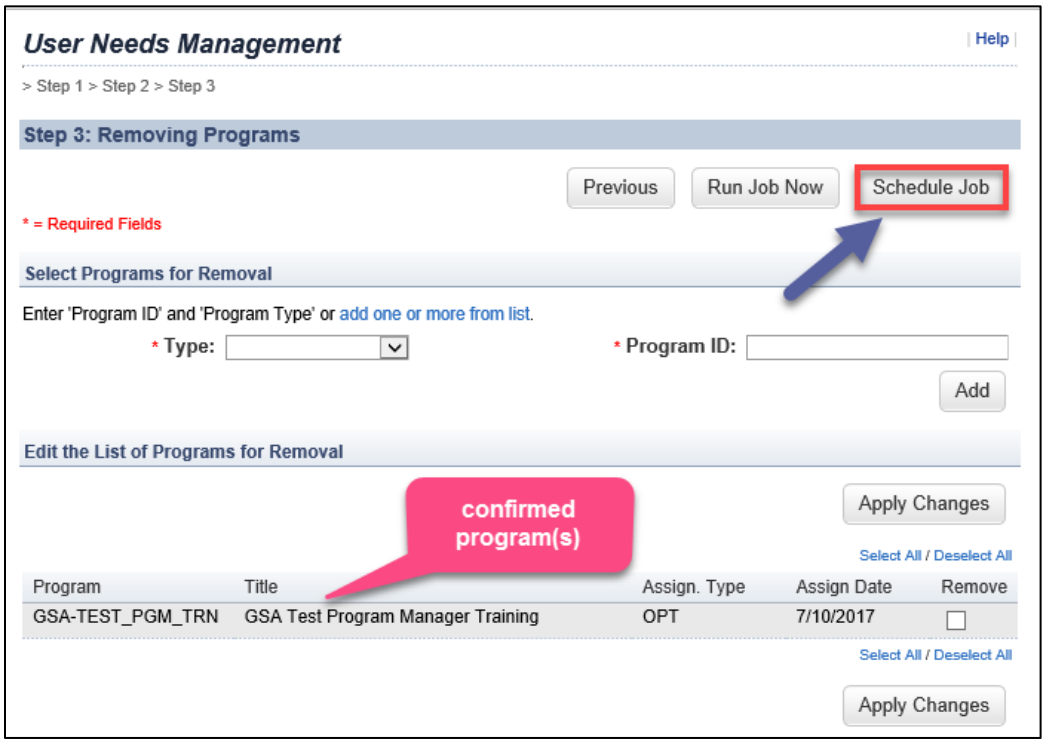
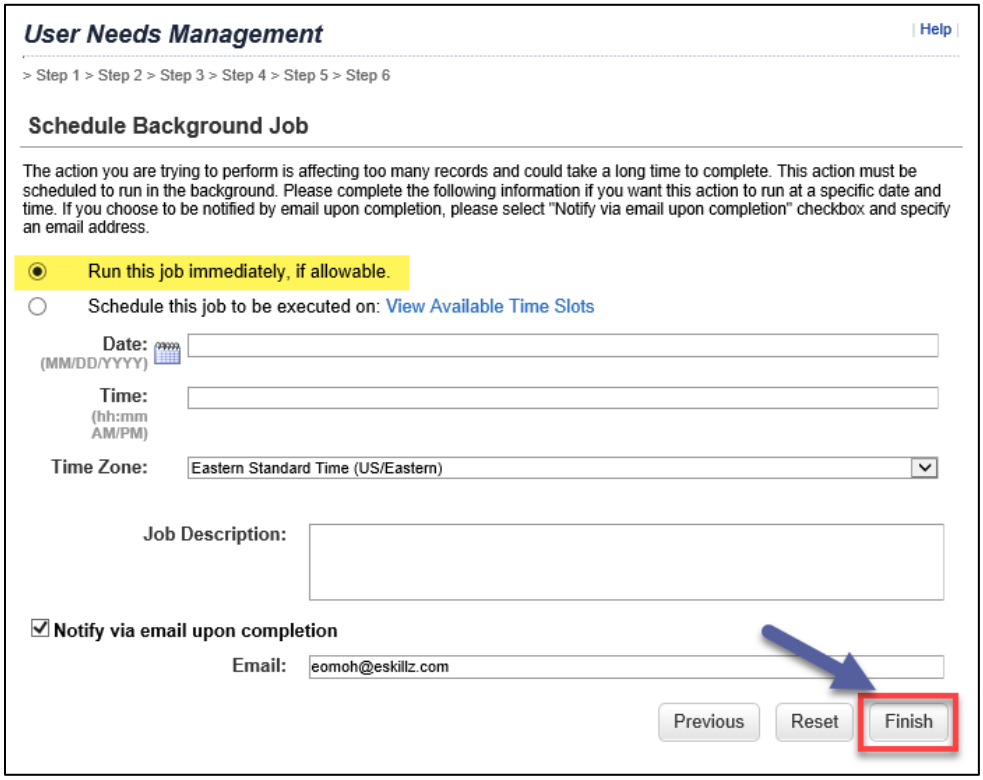
11. Repeat steps 8 – 10 to add more programs to be removed (if needed). Confirm the program(s) to be removed. Click **Schedule Jobs** to advance to the next step.



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



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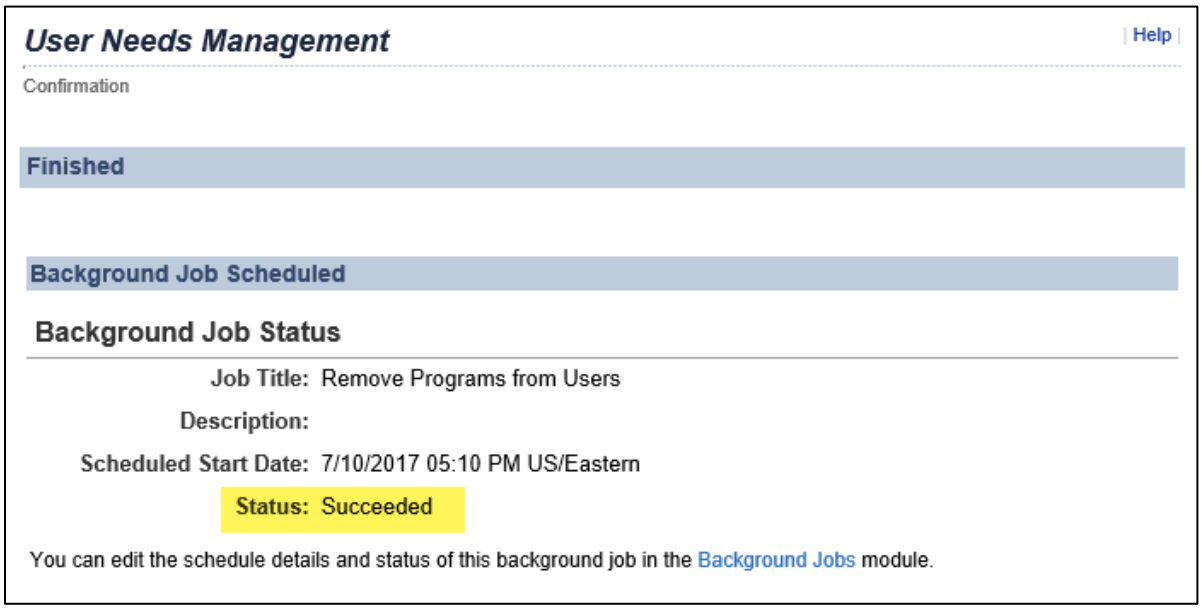
13. You have successfully removed the program!



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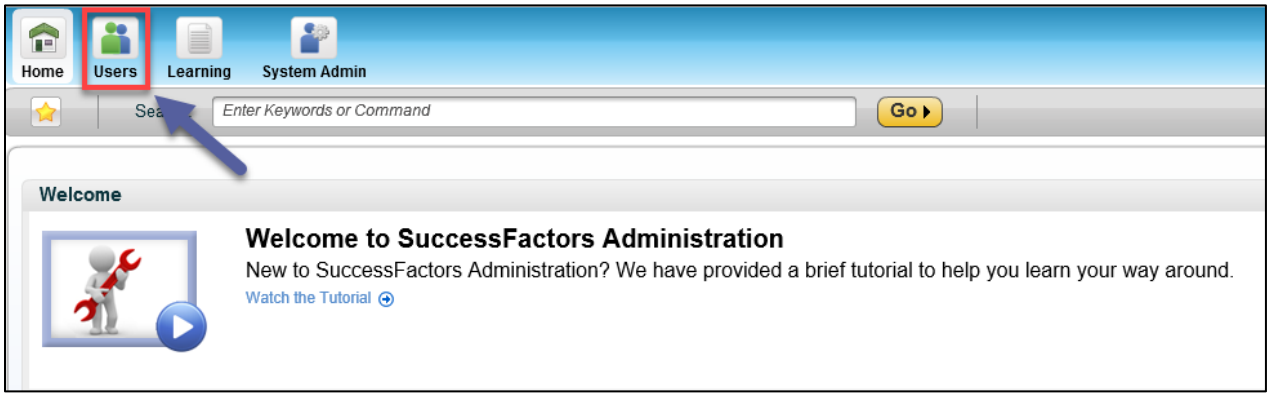
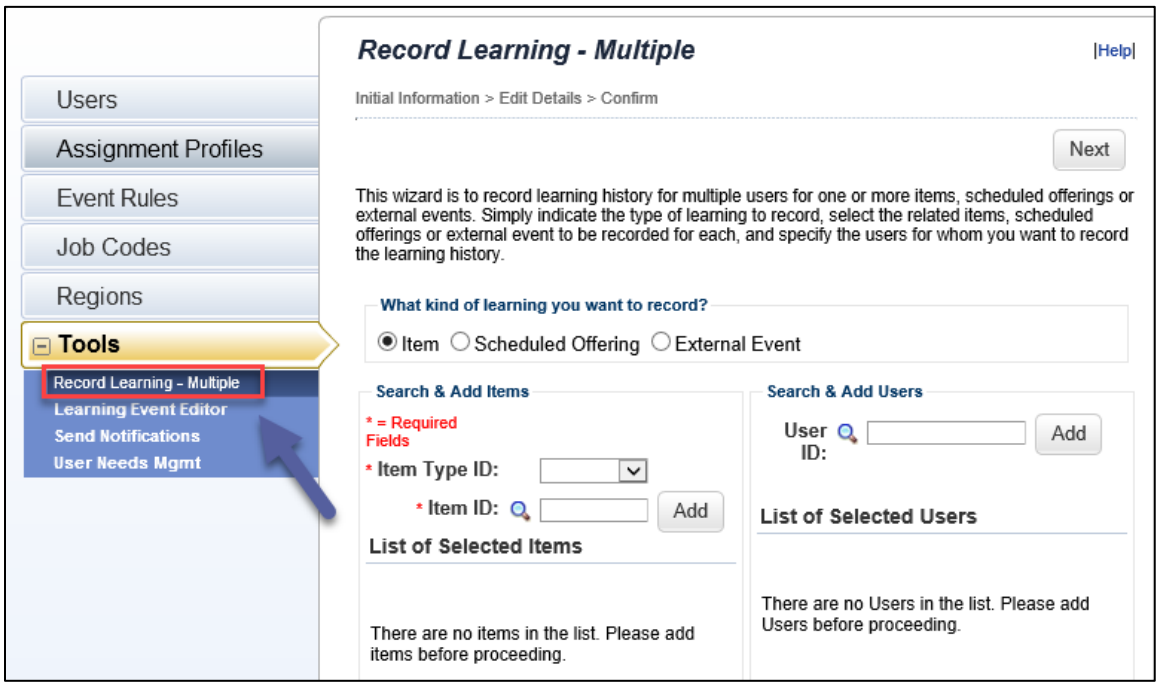
Record Item Completion

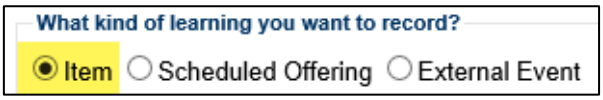
1. From the Learning Administration page (also called SuccessFactors Administration), click on the "Users" icon.



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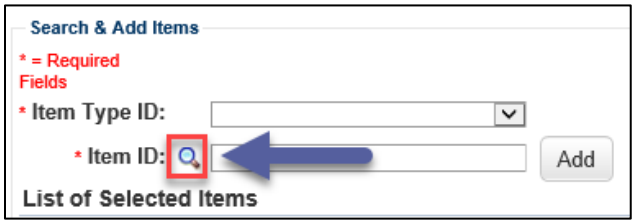
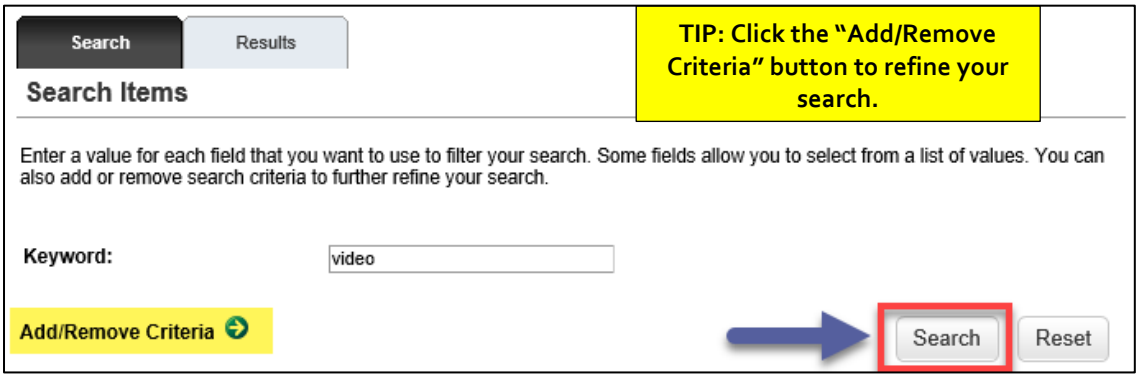
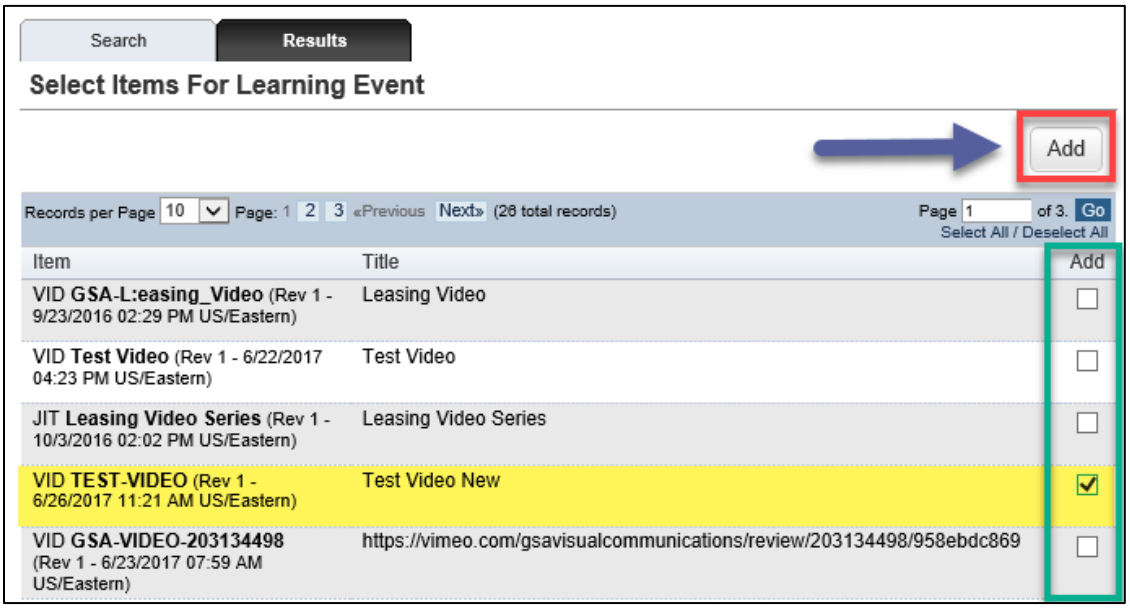
4. To select an item to record learning, click on the icon. A popup window will open with a list of item search criteria.



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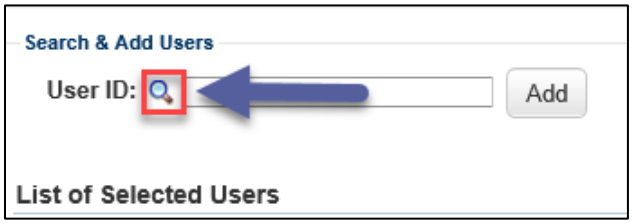
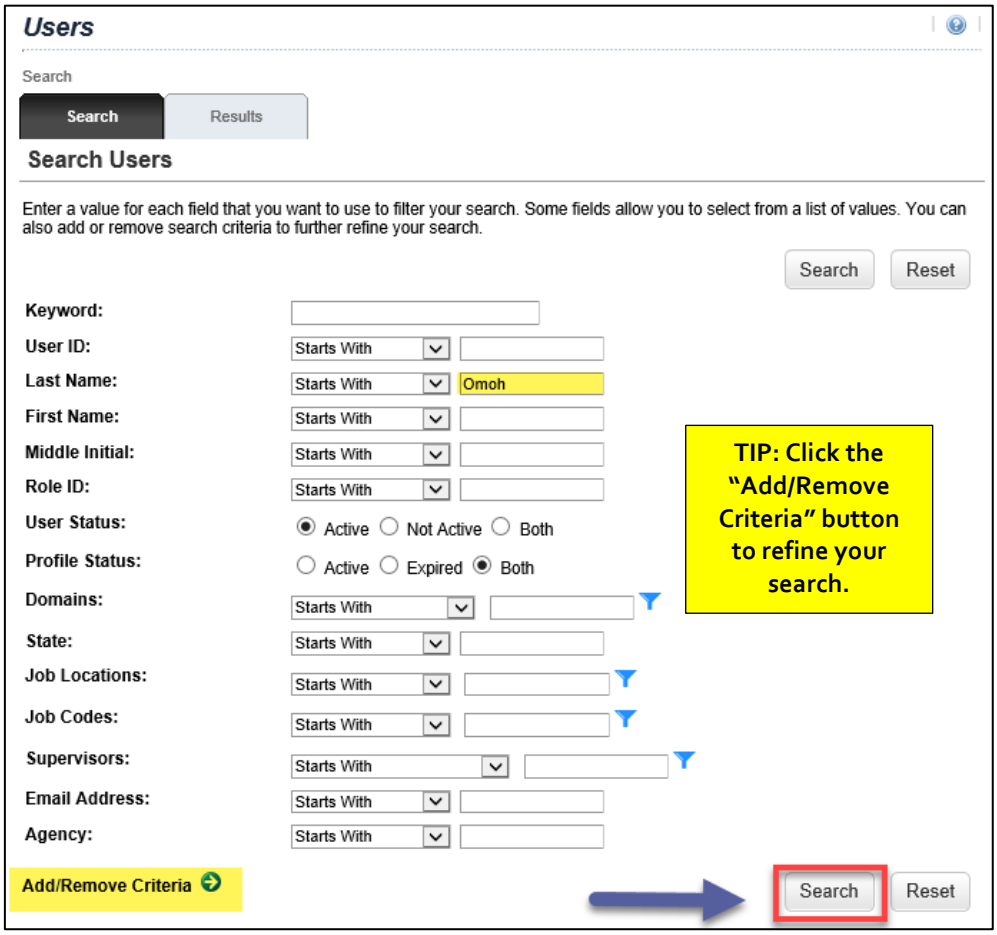
5. To select a user to record learning for, click on the icon. A popup window will open with a list of user search criteria.



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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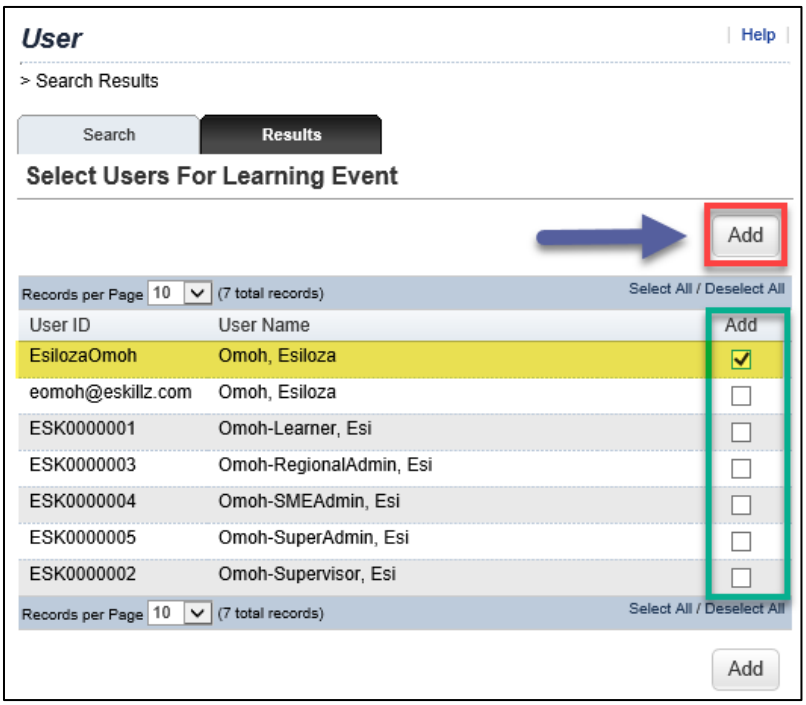
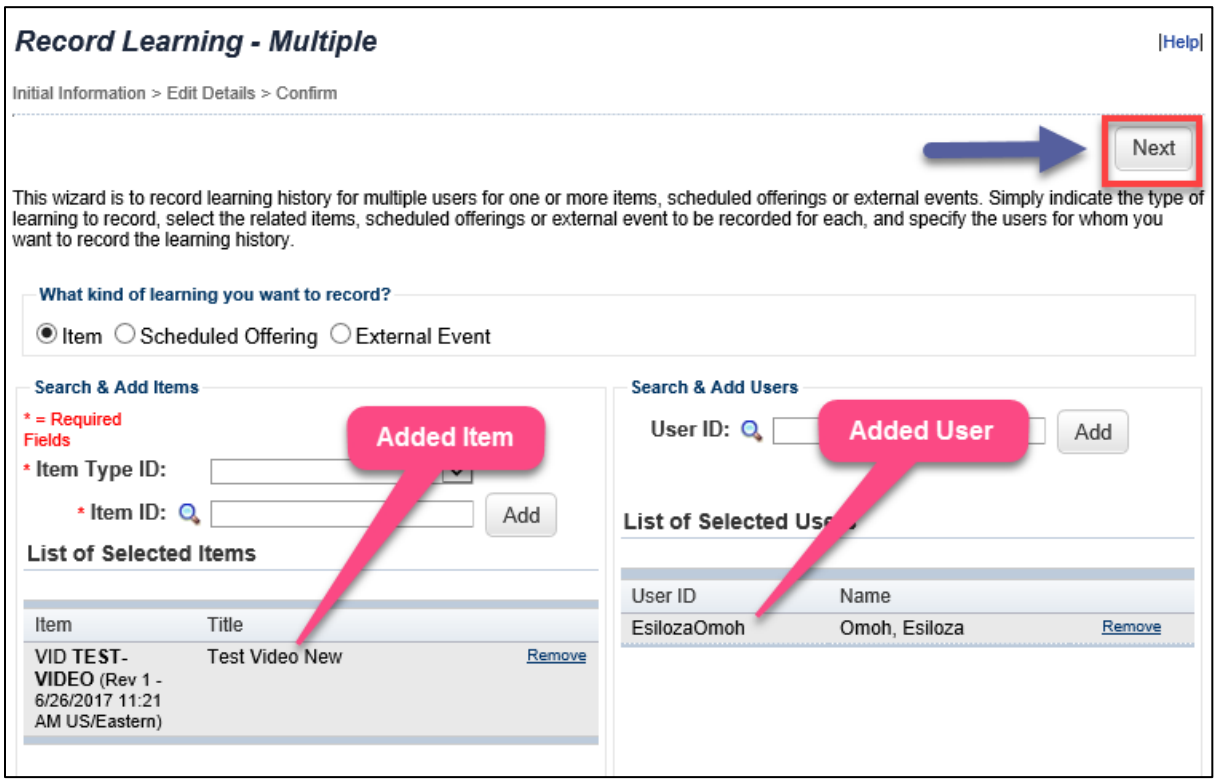


6. Repeat step 5 to add more users (if needed). Once you have added all desired users, click **Next** to advance to the next step.



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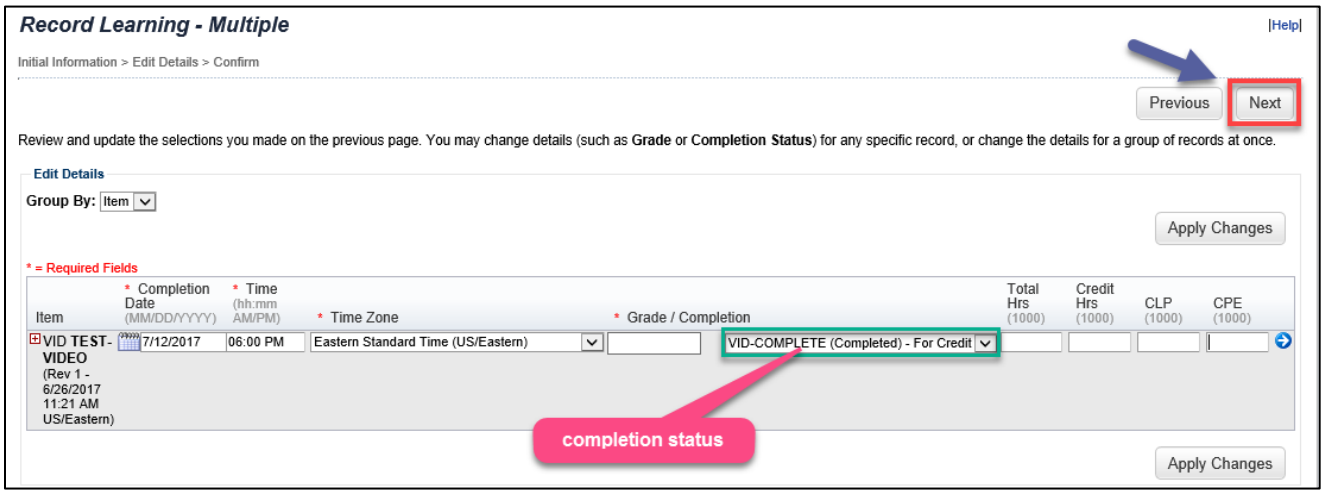
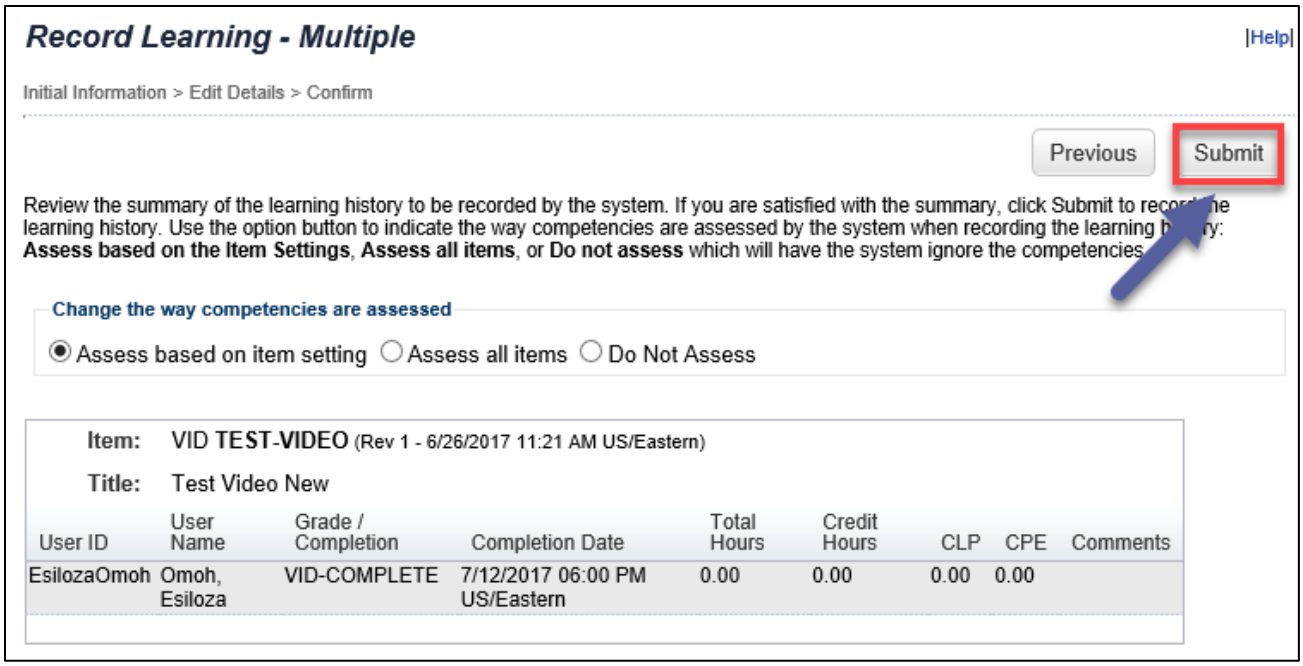
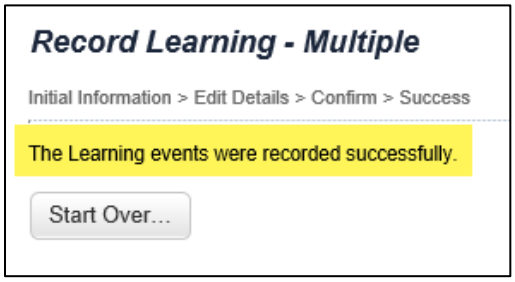
7. Select the completion status to be given and click **Next** to advance to the next step.



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



9. You have successfully recorded learning!



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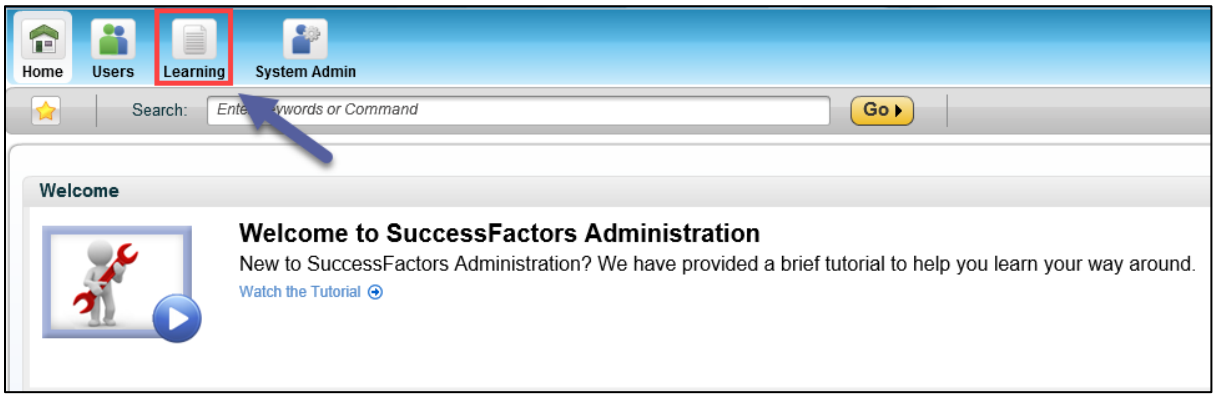
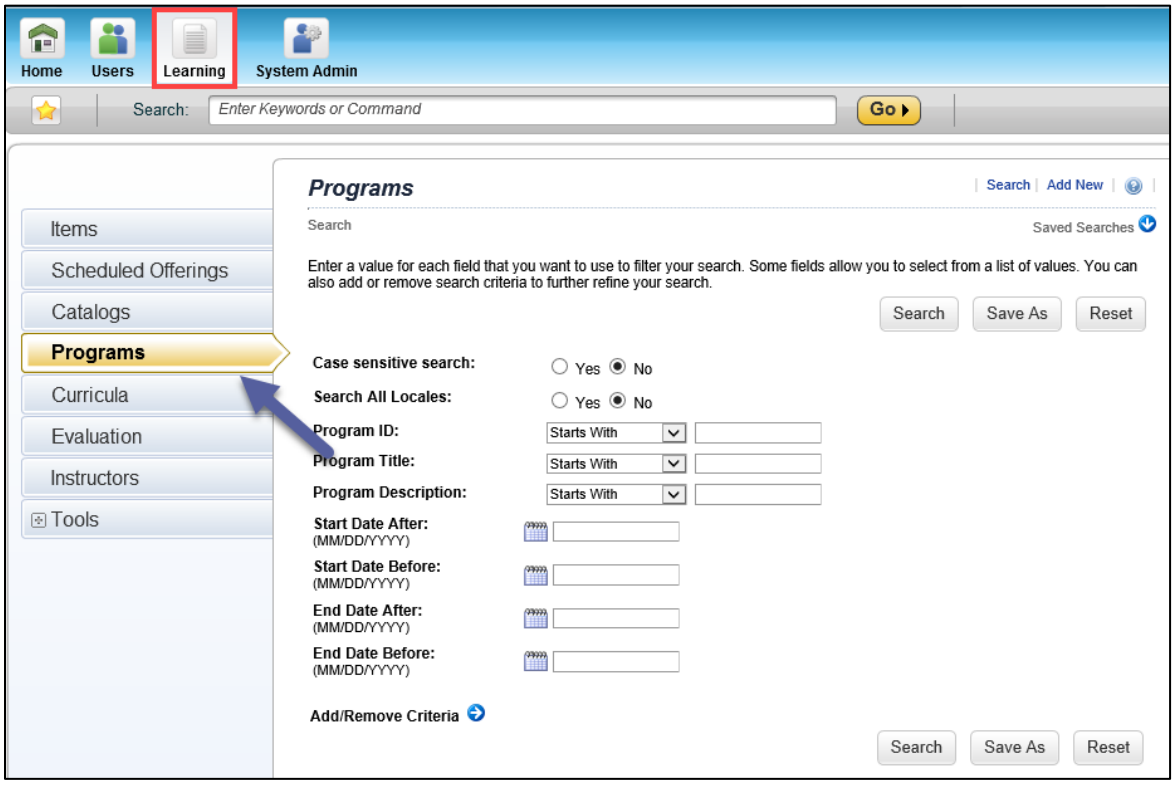
Email Learners

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



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



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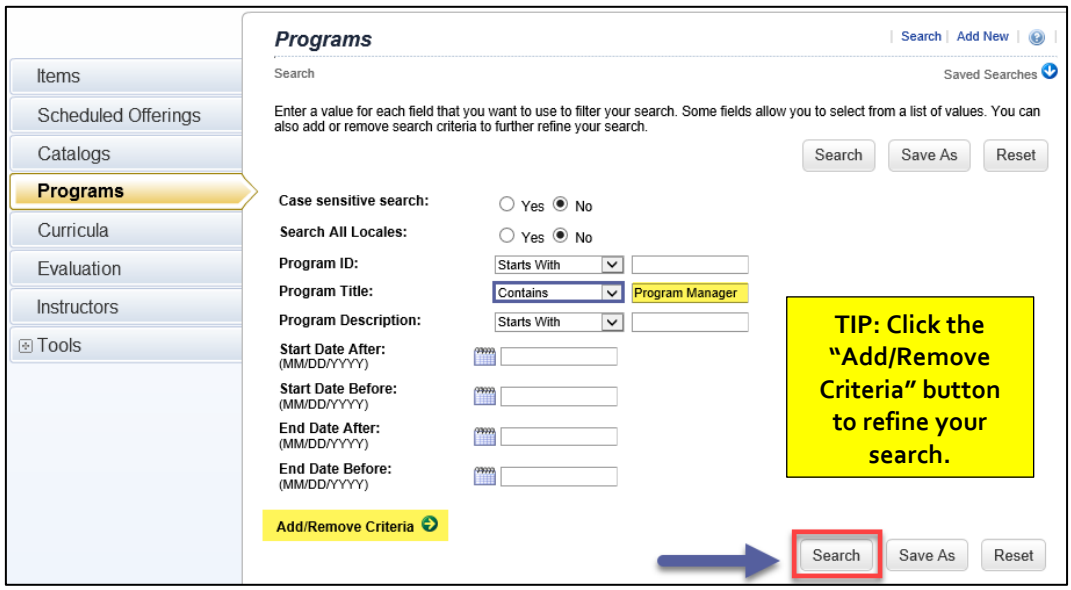
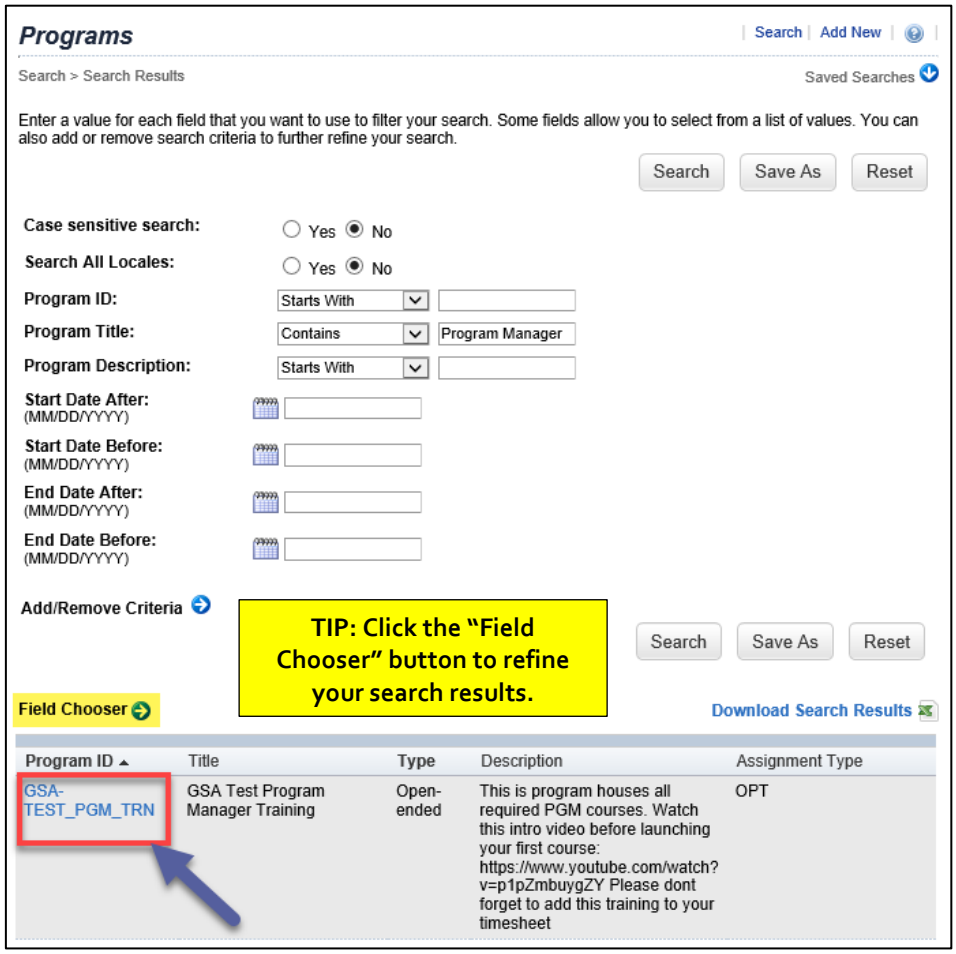
3. Enter the *Title* of your desired program. You can use the drop-down menu associated with most criteria to refine your search (ex: "starts with" vs. "contains"). Click **Search** to search for your desired program**.**



4. Locate your desired program. Click on the *Program ID* to select and open the program.



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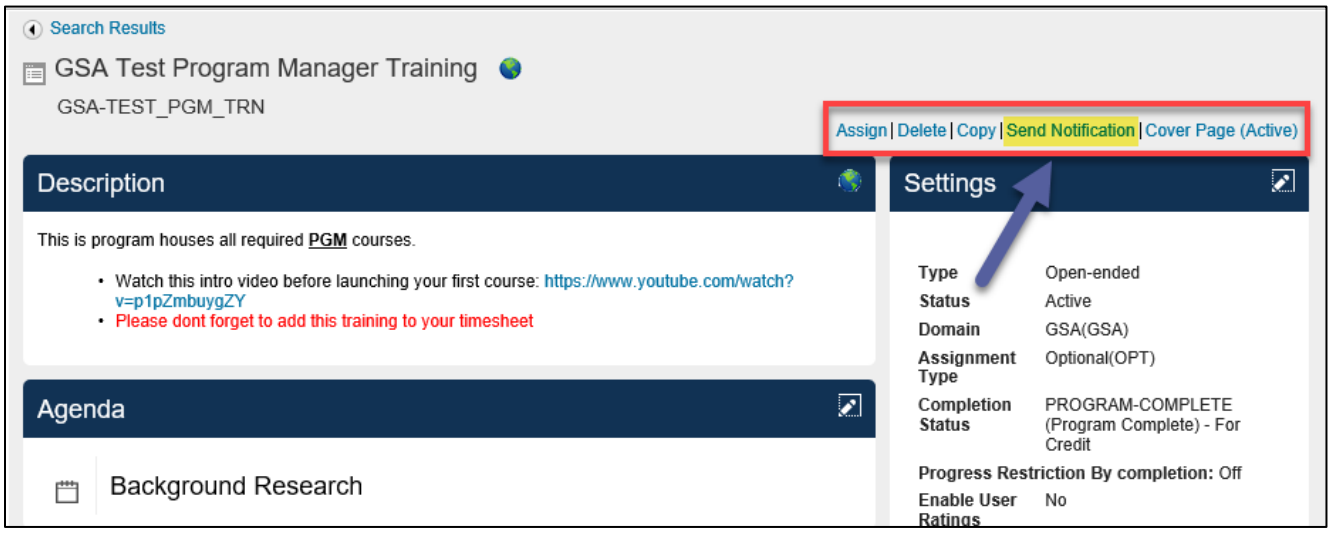
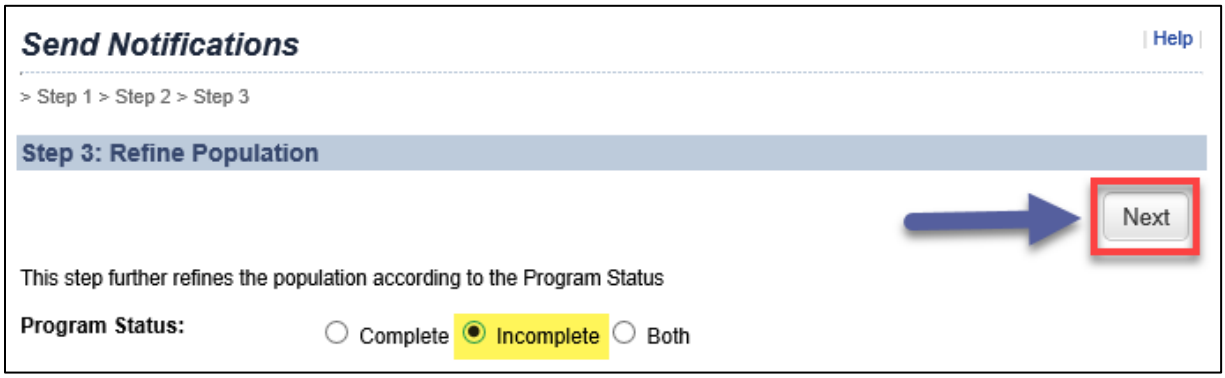
5. On the Program Administration Page, locate the Actions Menu and click **Send Notification**.



6. On the Send Notifications page, select the program 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 program 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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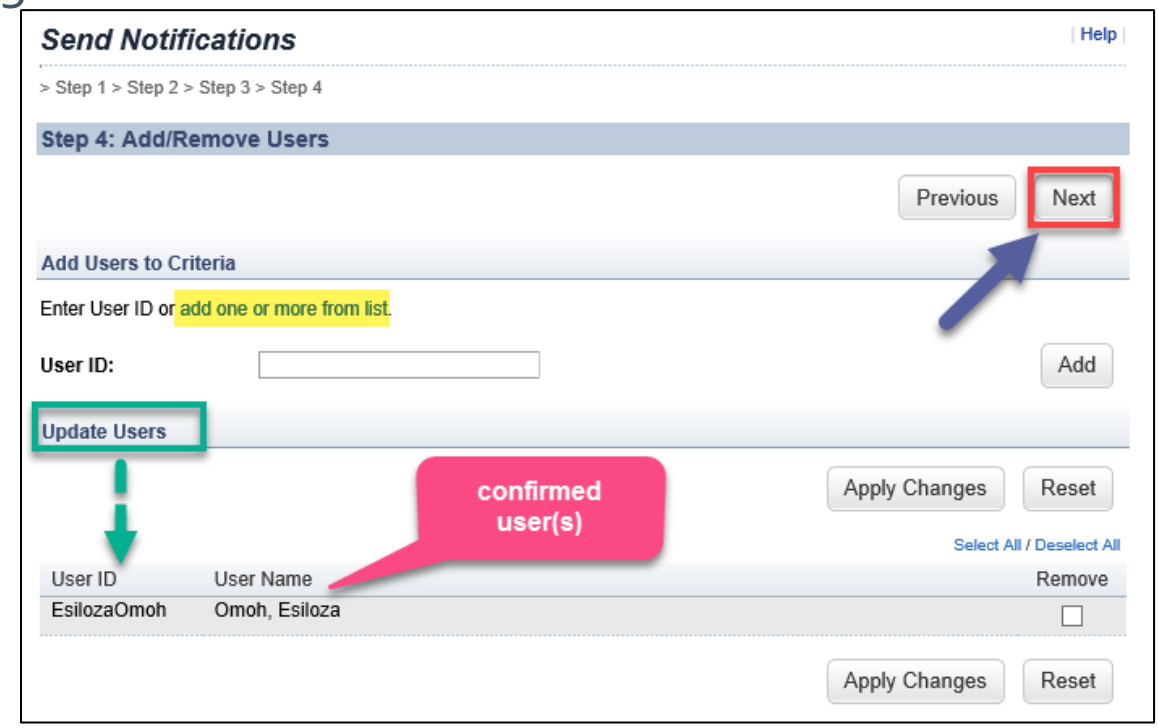
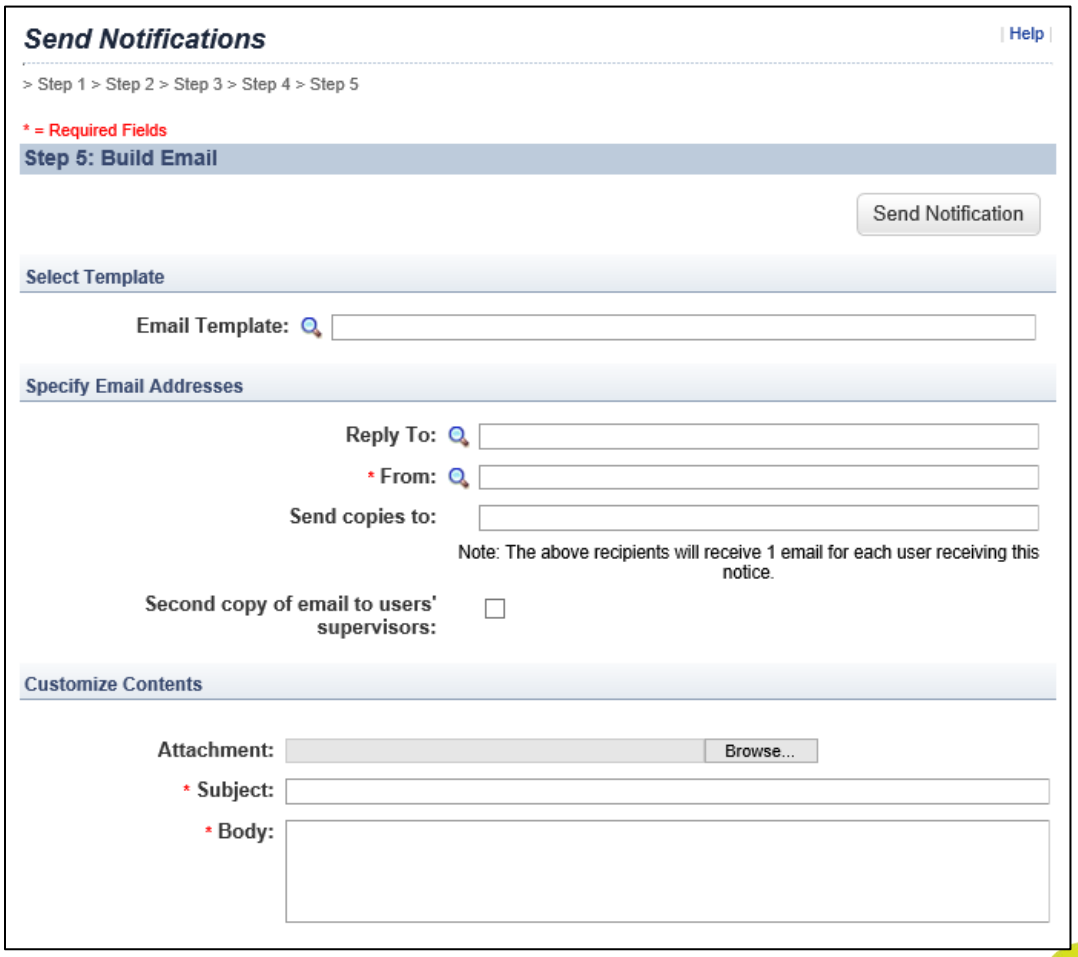


8. Build your notification email by filling in the appropriate fields.



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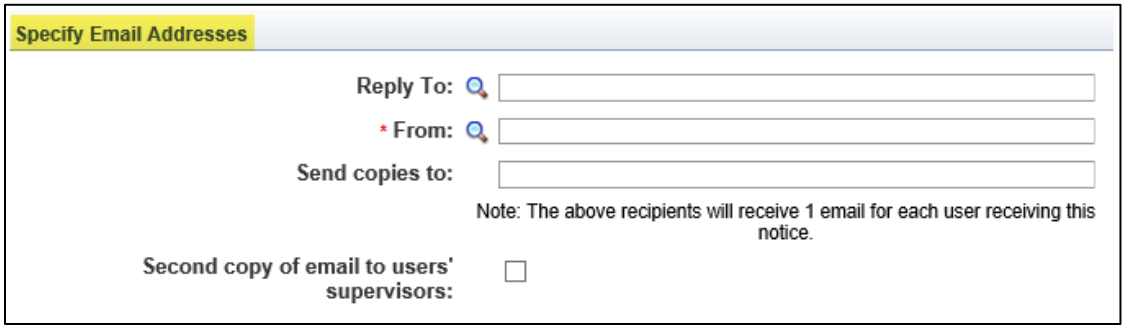
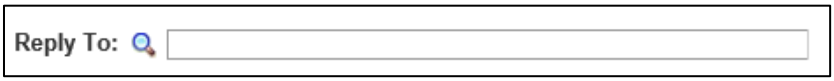
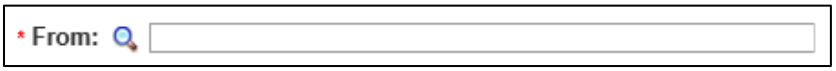
9. *Specify Email Addresses*



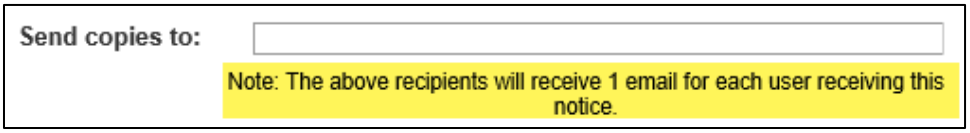
a. *Reply To*: Enter the email address you want users to respond to (usually the email sender).



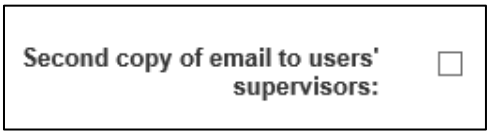
b. *From*: Enter your email address (or the email address of the person you are sending the email on behalf of).



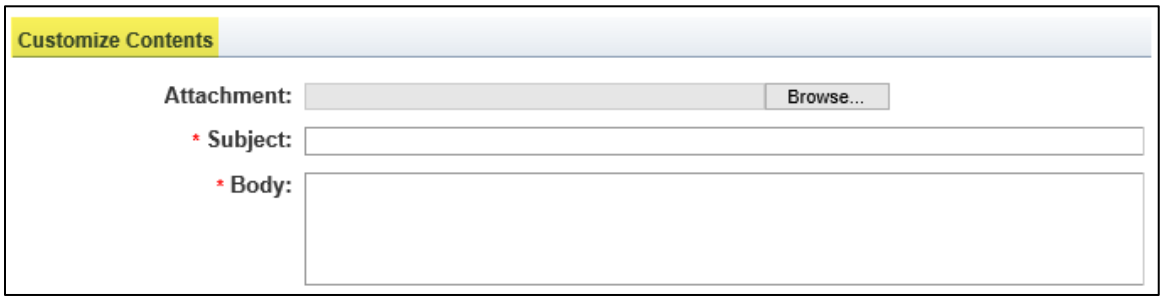
c. *Send copies to*: (leave this field blank)
Note: The recipients entered in the Send copies to box will receive an email for EVERY user receiving this notification. Ex: If you are sending this request to 5 participants, the recipient will receive 5 different emails.



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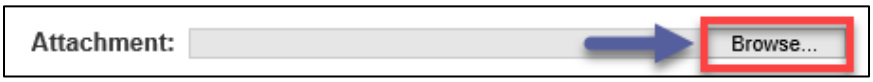
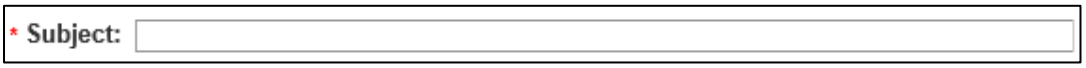
a. *Attachment*: Click on **Browse** to search your computer for files you would like to add as an attachment to your notification.

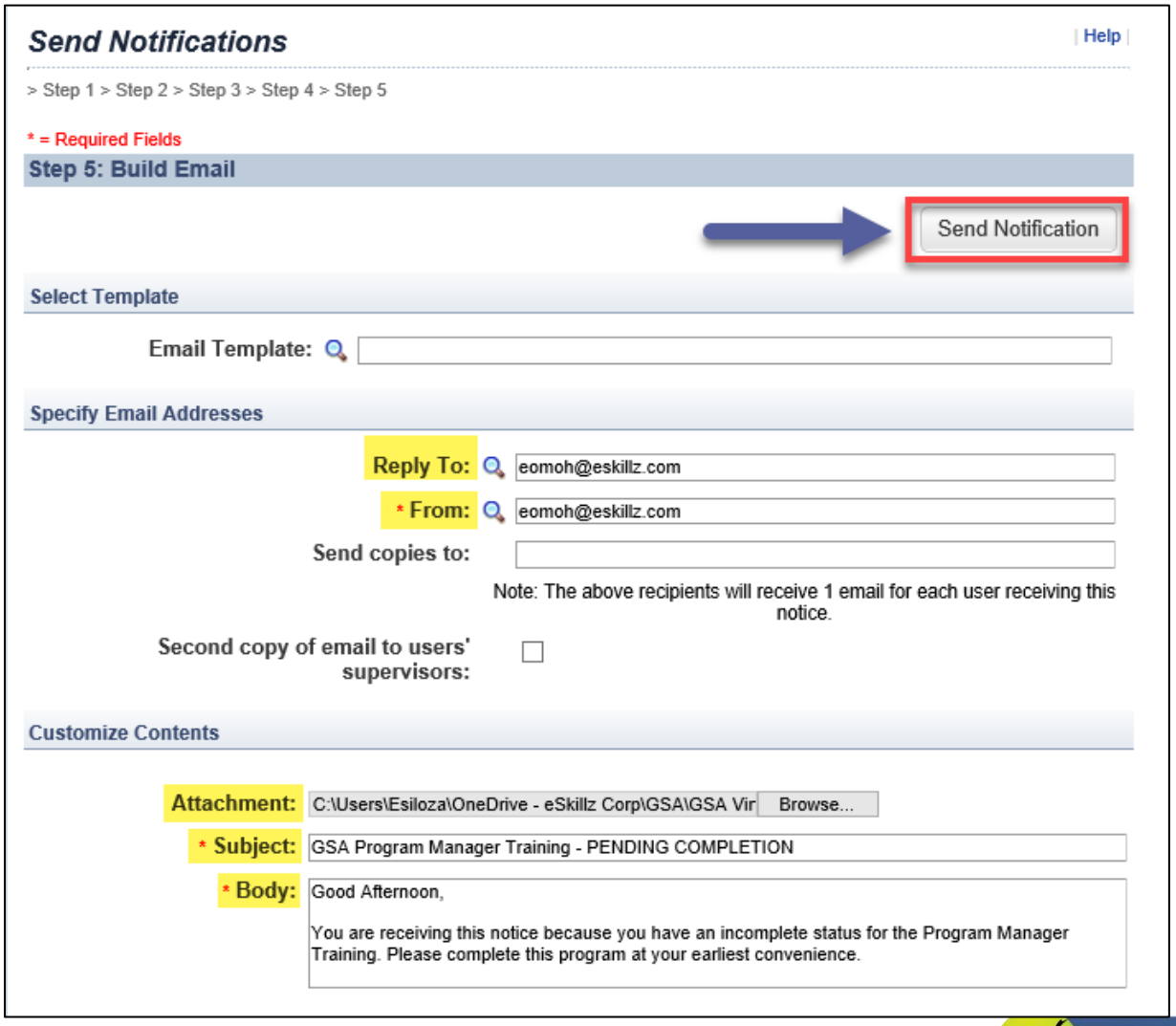


b. *Subject*: Enter the subject of your notification email.



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

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



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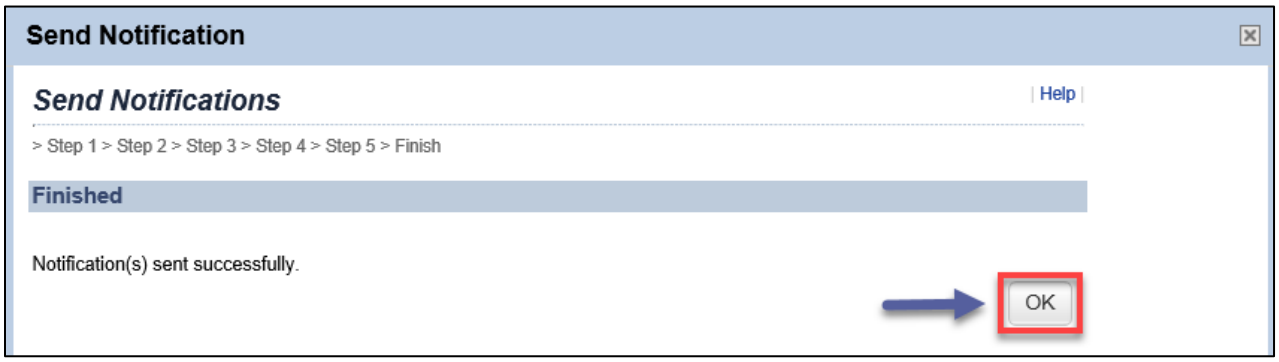
12. You have successfully sent your notification! Click **OK** to return to the Program Administration Page.



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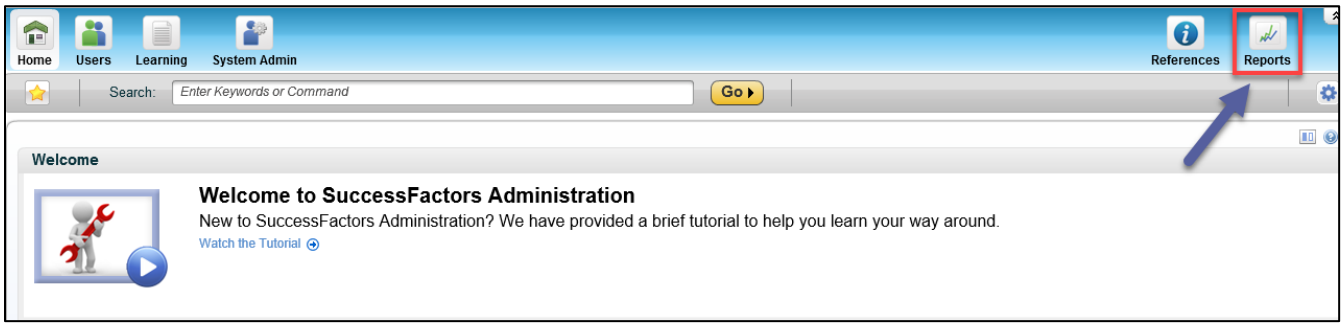
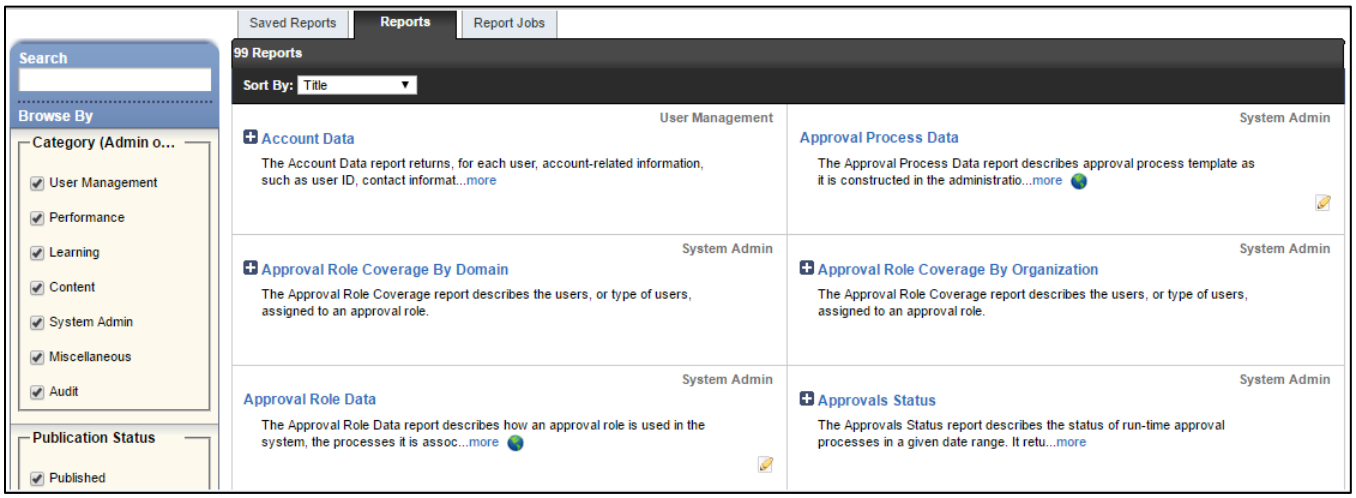
Reports Area Navigation

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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Report Management

Common Reports

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

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 program(s) 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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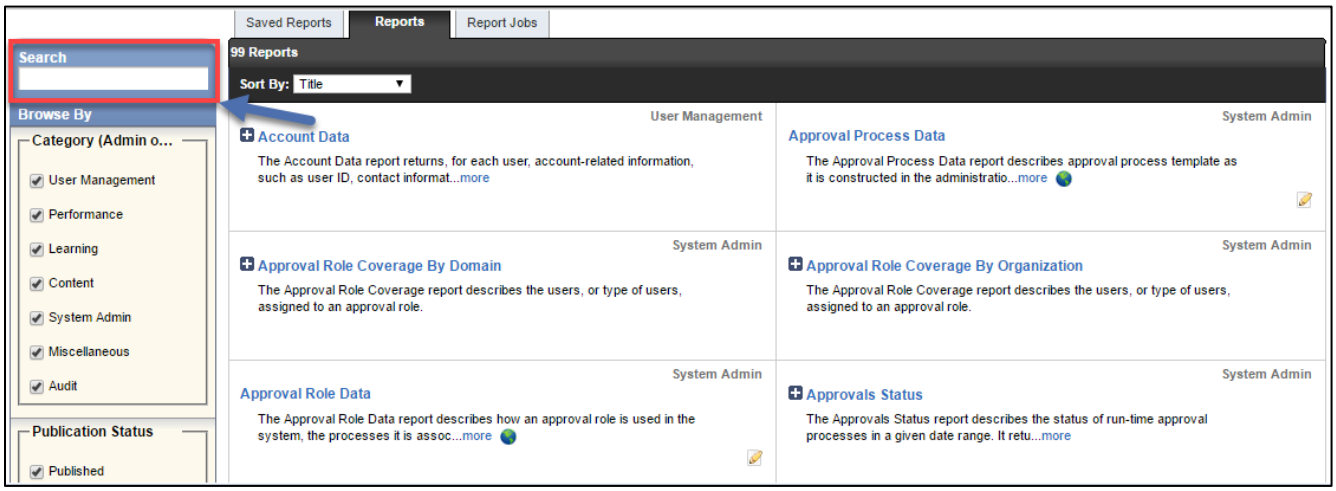
Report Management

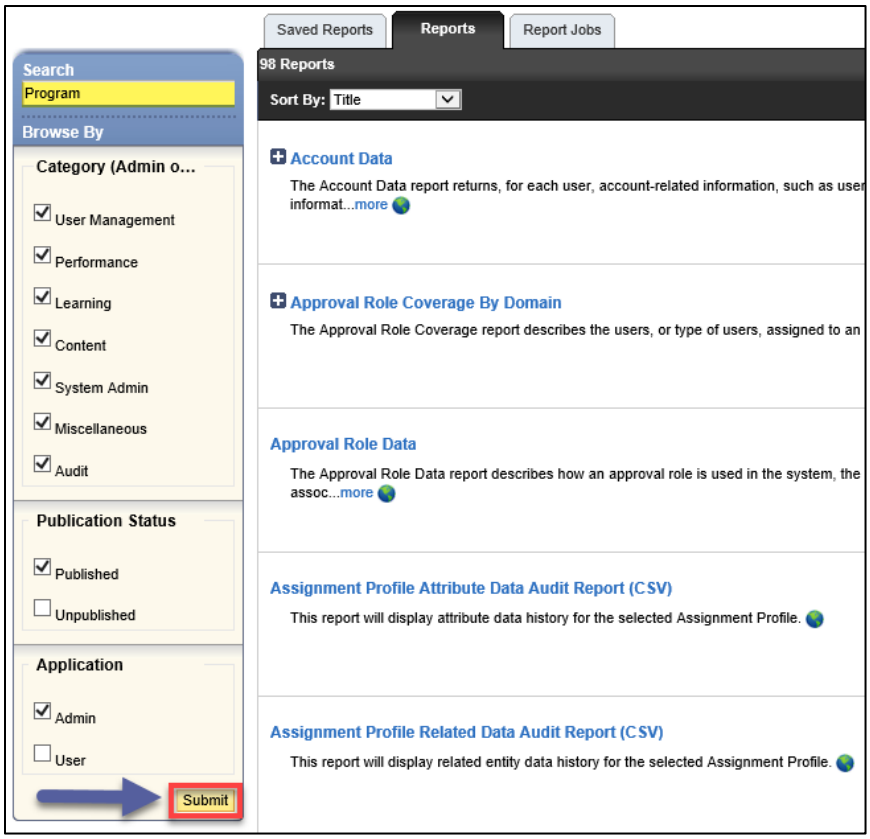
Search Reports

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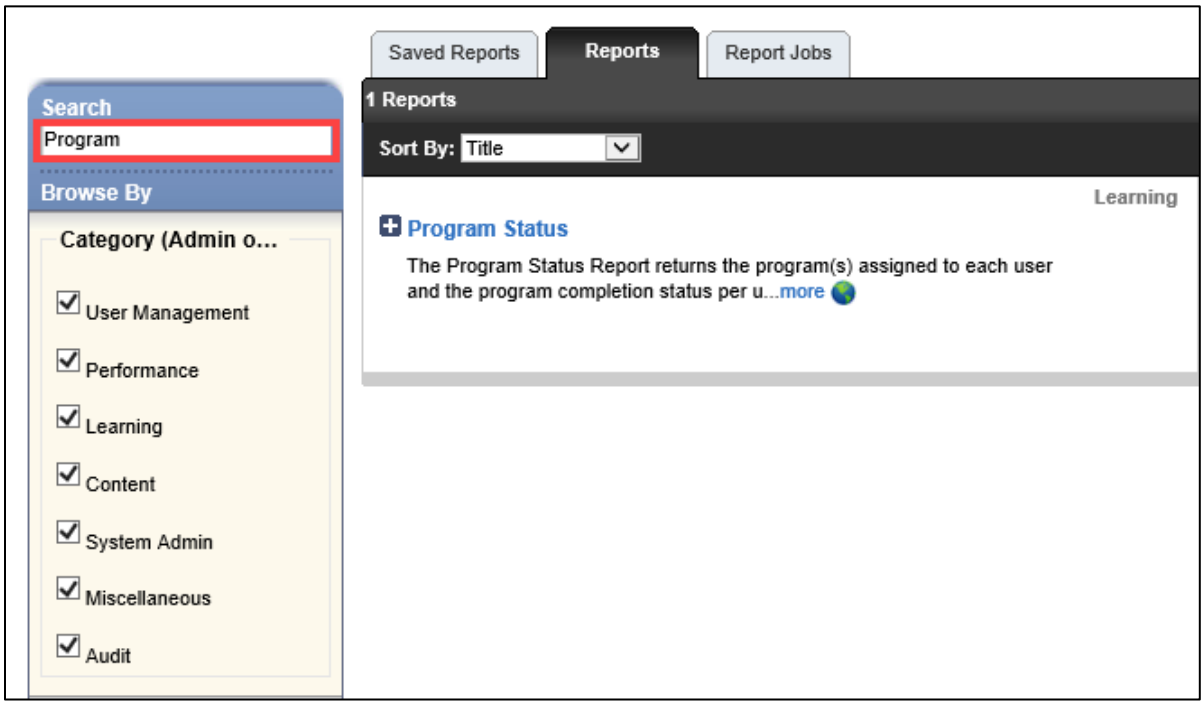
3. Based on the entered keyword, the system will return all reports associated with the search criteria. From the results, you may click a report name to run your desired report.



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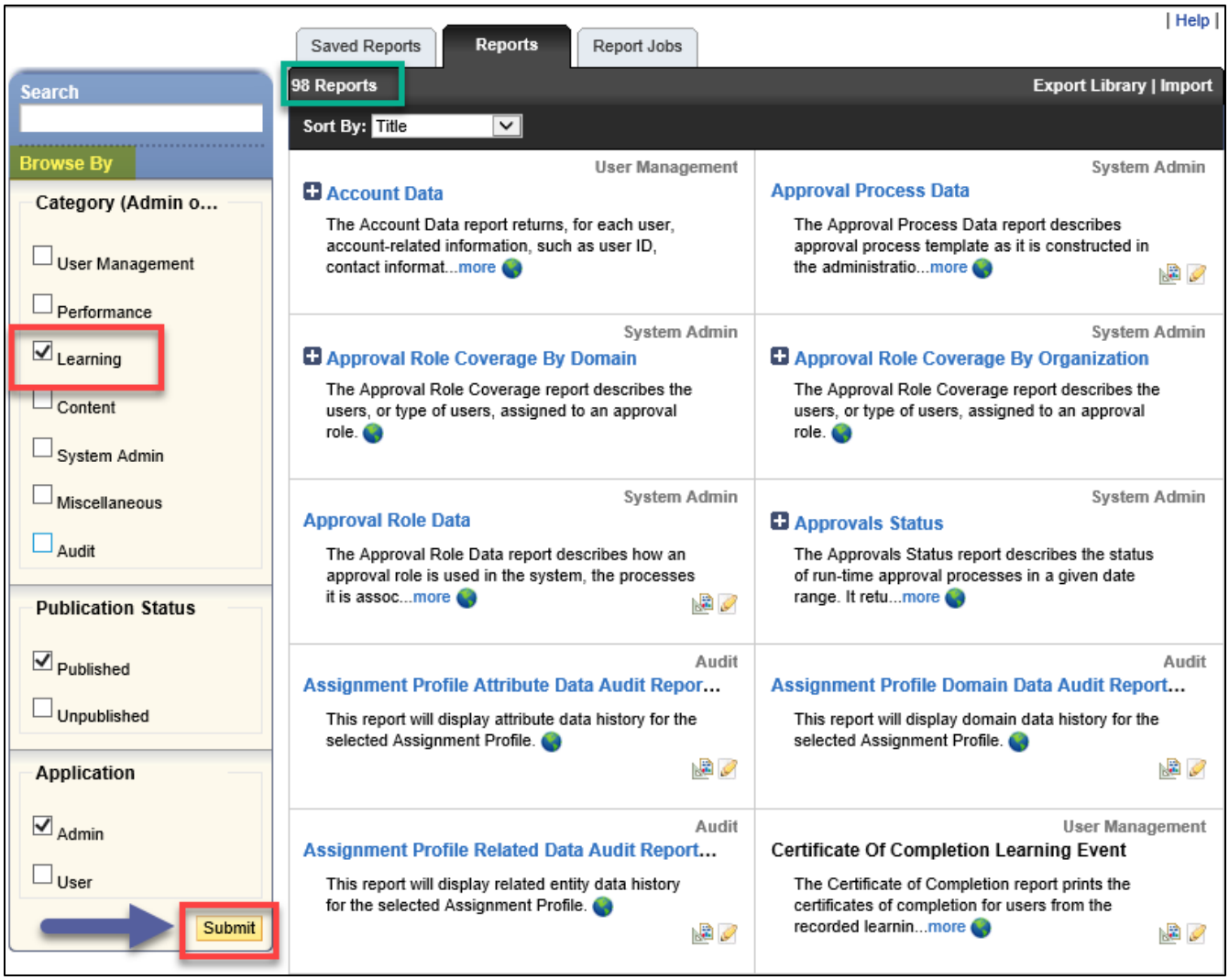
Report Management

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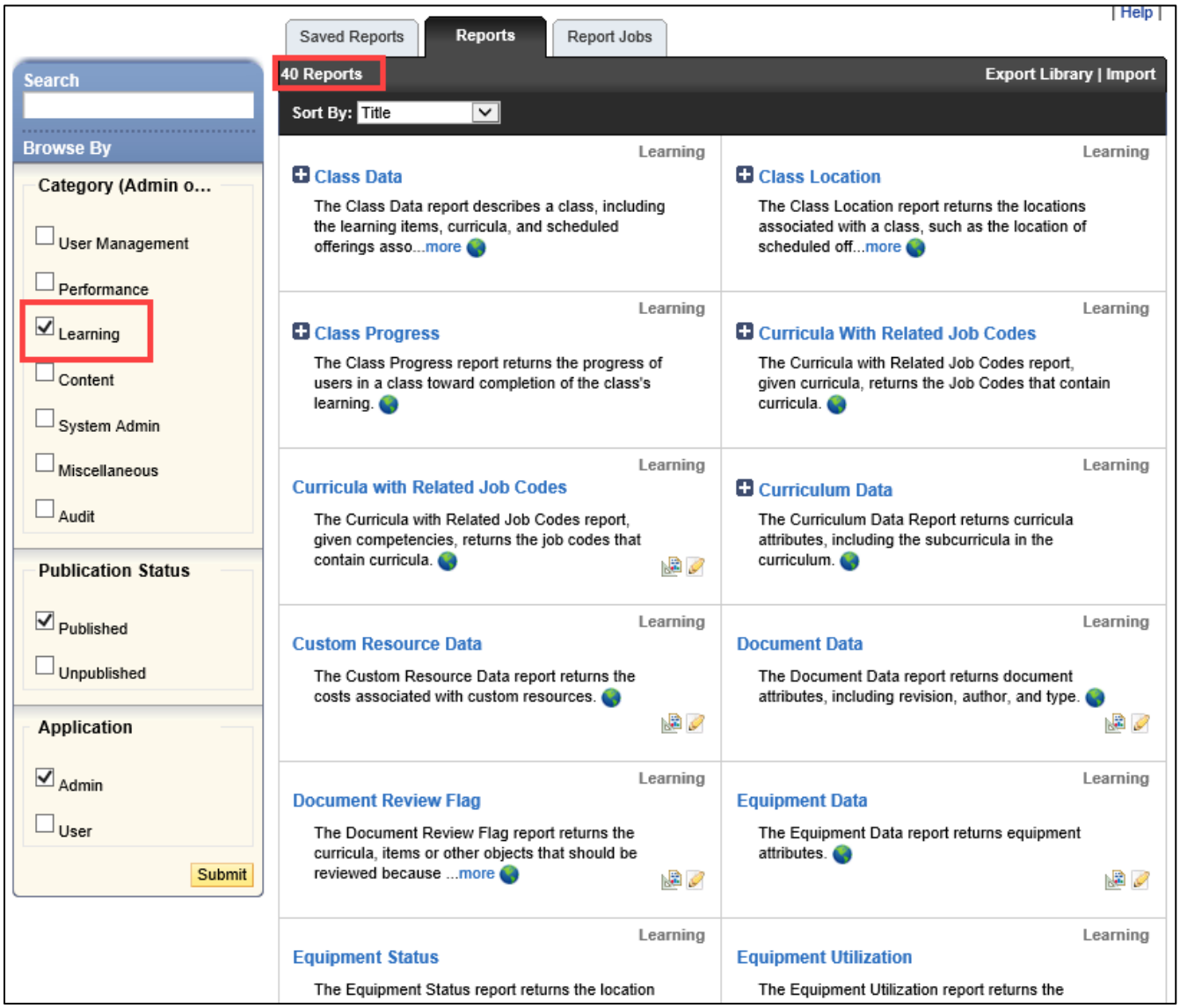
2. Based on the selected category, the system will return all reports associated with the filter criteria. From the results, you may click a report name to run the desired report.



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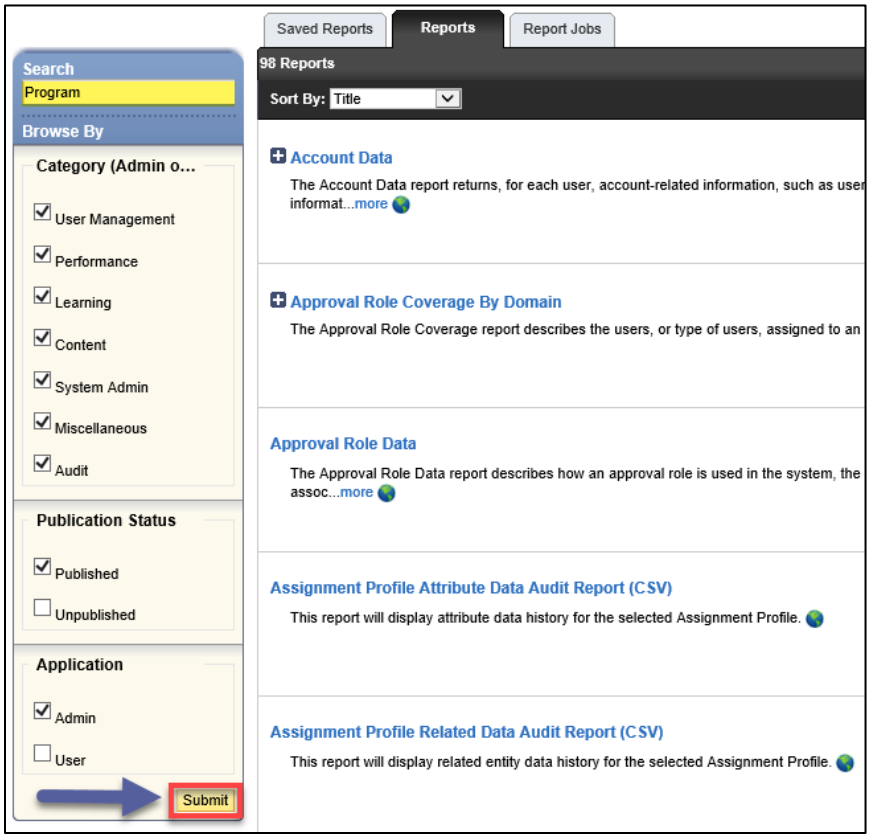
Report Management

Program Status Report

For programs, the Program Status report will be the best report to get individual and overall completion status for users assigned to programs. 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 "*Program Status*" report.

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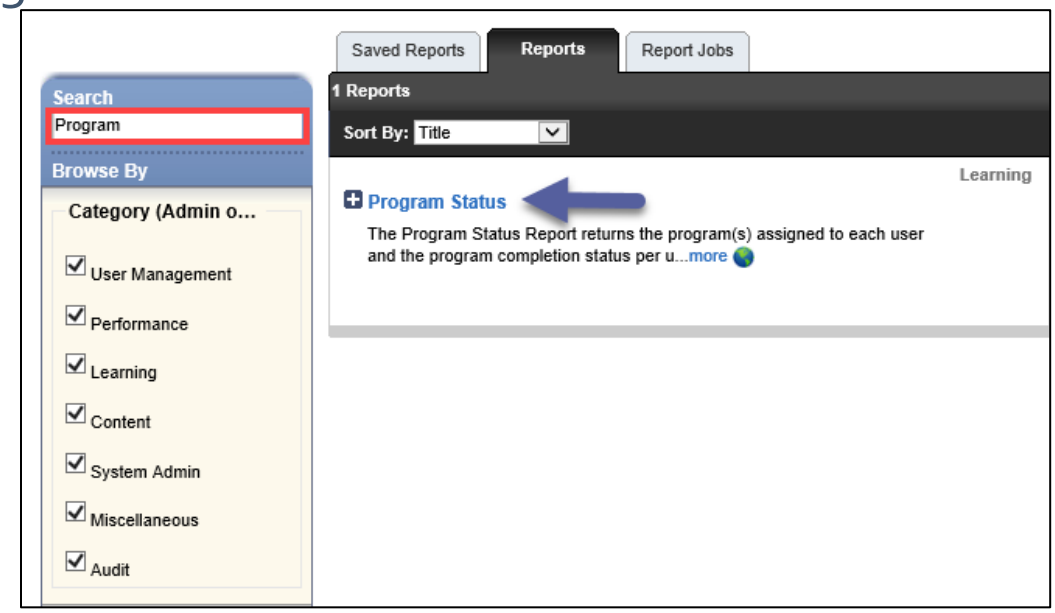
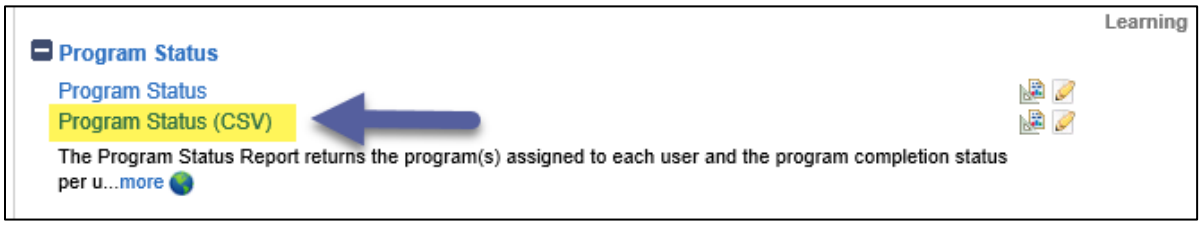
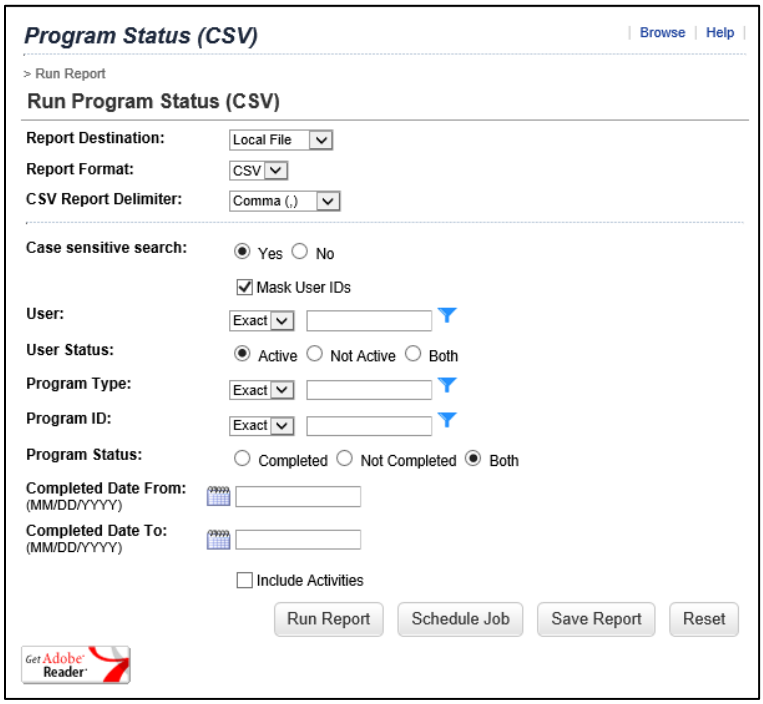


3. Click on the report title to see available report versions. Click on "*Program Status CSV*" to download the report as an Excel document.



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



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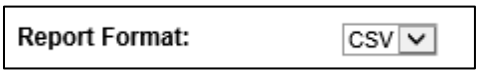
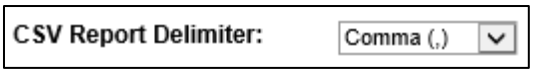
a. **Report Destination:** Use the drop-down menu to select the destination of your downloaded report. Destination options include Browser (open via internet browser), Local File (download to your computer), and Remote File.

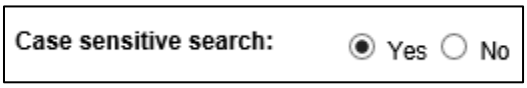
b. **Report Format:** You may choose to leave this as "CSV".



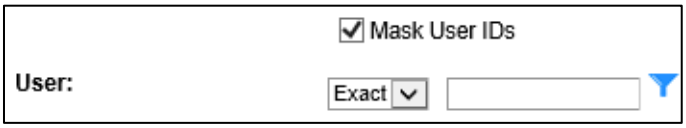
c. **CSV Report Delimiter:** You may choose to leave this as "comma".



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

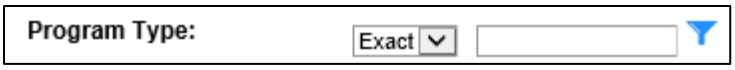


e. **User:** Check the "Mask User IDs" box to hide the learners' user ID info. Leave the user field blank to pull all users associated with the desired program.



f. **User Status:** Indicate user status.

g. **Program Type**: Enter program type. To filter results by a specific program type, click on the icon. A popup window will open with a list of program types to choose from.
***NOTE**: You may choose to leave this field blank to search for all program types associated with your desired program title.



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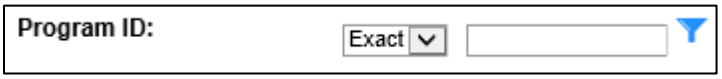
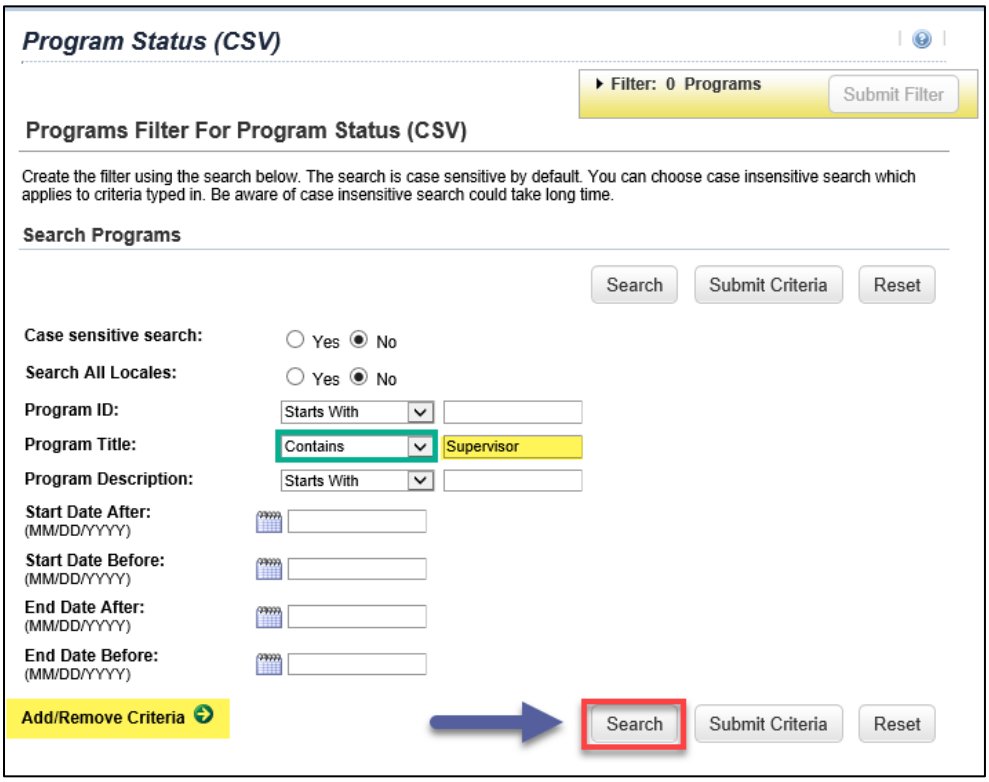
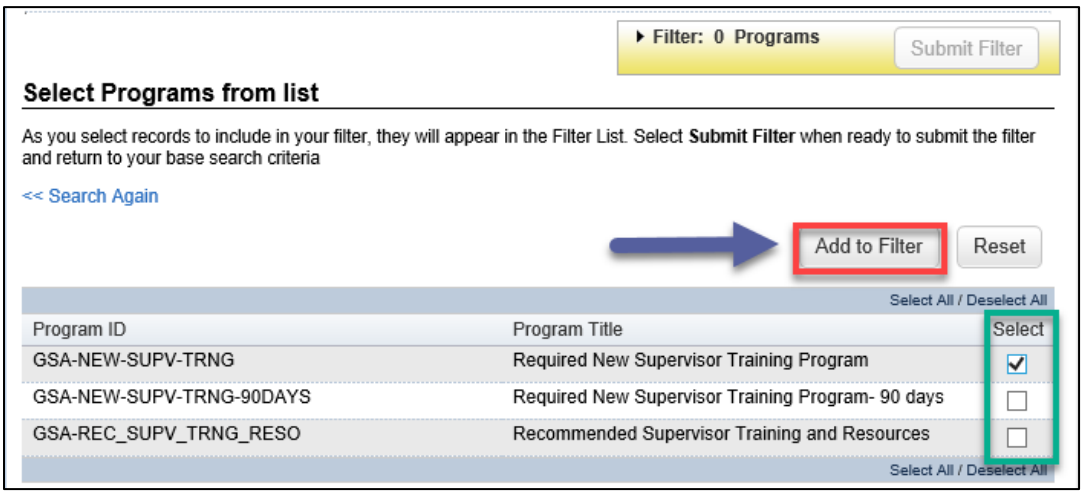
h. **Program ID**: To filter results by program, click on the icon. A popup window will open with a list of program search criteria.



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



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



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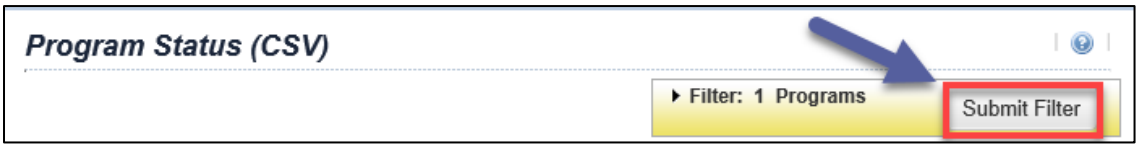
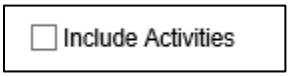
iii. Click **Submit Filter** at the top of the screen to return to the Program Status report.

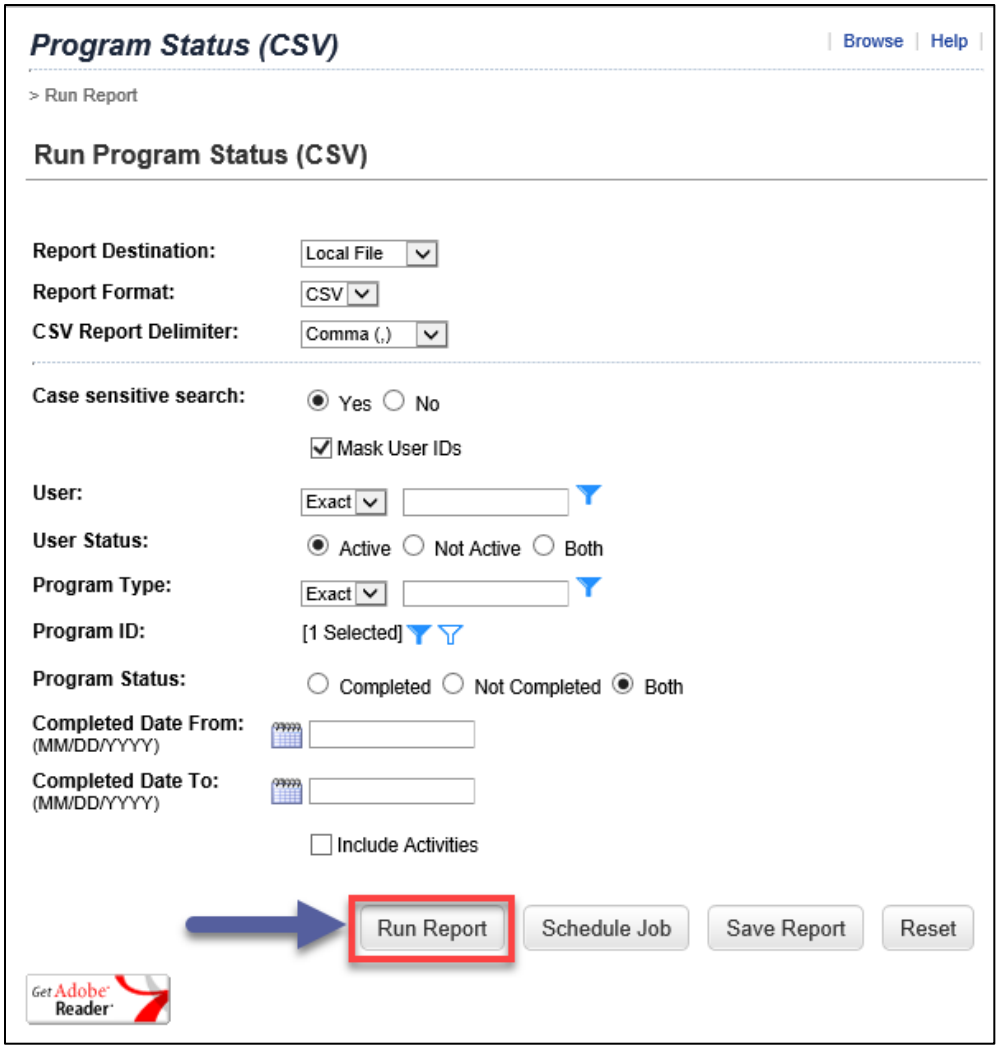


i. **Program Status**: Select the program status of the users you wish to report on.

j. **Include Activities**: Check this box if you wish to report on the individual items in the program.



5. Once all criteria have been entered, click **Run Report**.



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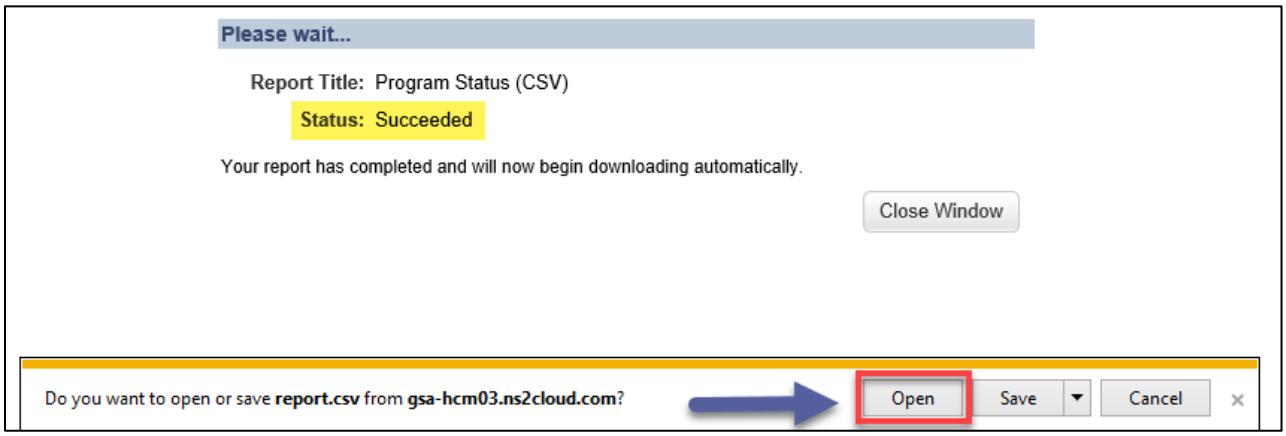
6. You have successfully run your Program Status report! Utilize your browser settings to open your downloaded report.



Program ID	Program Type	Program Period	User ID	Last Name	First Name	MI	Assignment Date	Assignment Type	% of Completion	Completion Date	Completion Status
GSA-NEW-SUPV-TRNG	Duration-based	52 week(s)	*********	[redacted]	[redacted]	[redacted]	5/25/2016	REQ	100	4/17/2017 01:56 PM	Program Completed
GSA-NEW-SUPV-TRNG	Duration-based	52 week(s)	*********	[redacted]	[redacted]	[redacted]	8/25/2015	REQ	0		
GSA-NEW-SUPV-TRNG	Duration-based	52 week(s)	*********	[redacted]	[redacted]	[redacted]	3/24/2017	REQ	19.05		
GSA-NEW-SUPV-TRNG	Duration-based	52 week(s)	*********	[redacted]	[redacted]	[redacted]	5/18/2015	REQ	61.9		
GSA-NEW-SUPV-TRNG	Duration-based	52 week(s)	*********	[redacted]	[redacted]	[redacted]	3/6/2016	REQ	57.14		
GSA-NEW-SUPV-TRNG	Duration-based	52 week(s)	*********	[redacted]	[redacted]	[redacted]	5/31/2015	REQ	42.86		
GSA-NEW-SUPV-TRNG	Duration-based	52 week(s)	*********	[redacted]	[redacted]	[redacted]	11/3/2016	REQ	100	1/18/2017 05:58 PM	Program Completed

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