# System Administration Training

LMS Exercises

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# Managing Groups

## Exercise – Creating a Group with One Criteria

**Objective**:  In this exercise, you will create a group that includes only users that meet the one criteria selected

1.  To start creating groups, navigate through these pages: Admin > Org Units > Manage Organizational Unit Hierarchy > Select Organizational Unit: Group.

2.  Click Add Group.

3.  Name your group anything unique to find it again – use your last name perhaps?

4.  Click Add New Criteria to begin building your group.

5.  Select any attribute from the list. You may choose a custom field.  (Example: **Create Date**)

6.  From the dropdown, choose the appropriate operator and select the desired value (Example: **on or after** operator and **1/1/2015** value)

7.  Click on the diskette icon to save the criteria.

8.  Click Save to create this group.

| **Q1:**  We've been ignoring many fields on this page such as ID, Description, and Owner. Why would they be useful to populate? |
| --- |
| **A:** |

## Exercise – Create a Group with an OR Statement

**Objective**: In this exercise, you will create a group that includes users that were hired on or after a defined date OR users who completed a certain training.

1. Create a new group.

2. Name your group anything unique to find it again – use your last name followed by a 2 perhaps?

3. Add your first criteria: users with last hire date on or after 1/1/2015.  Click Add New Criteria to add another criteria to the group – this will create an OR statement.

4. Add your second criteria:  users with orig hire date on or after 1/1/2015.  Click Add New Criteria to add another criteria to the group – this will create another OR statement.

5. Select the Training attribute.

6. You will see three dropdowns: choose the status of "Completed", select both assignment types, and search for a training title that you know is required. (Example:  Business Ethics or Code of Conduct)

7. Click Save to create this group.

| **Q1:** What is the difference between the Assignment Types: Assigned and Requested? |
| --- |
| **A:** |

# Exercise – Create a Group with an AND Statement

**Objective**: In this exercise, you will create a group that includes users that have completed training and are in a specific Division (or one of its subordinates)

Can you do this one on your own? First, select the training attribute like you did in the second groups practice. Then, click the Add Condition link to create the AND criteria. Finally, select the attribute of "Division," choose the operator "Is or Below," and find the Division of your choice. Be sure to click Save.

# ILT Administration

## Exercise – Create an Event

**Objective**: In this exercise, you will create an Event.

1. To start creating an event, navigate through these pages: ILT > Manage Events & Sessions.

2. **Note:  You can also start creating a new Event from the Learning Console**

3. Click Create New Event.

4. On the Properties page, complete the following fields (feel free to explore too):

   - Event Name – name your event anything unique to find it again.
   - Vendor – ABC Corporation (your admin #).
   - Subject – choose a subject that applies to your Event topic.

5. On the Availability page, make this available to **All Users** and place a checkmark in all three boxes.

6. On the Pricing page, leave the default price of $0.

7. On the Training Units page, leave the first radio button selected.

8. On the Session Defaults page, complete the following fields (feel free to explore too):

   - Minimum Registration – enter a 0 in this field.
   - Maximum Registration – enter a typical class size number in this field.

9. Save your Event.

| **Q1:**  Will users be able to see the Event you just created? If so, can they sign up for a seat? |
| --- |
| **A:** |

# Exercise – Create a Session

**Objective**: In this exercise, you will create a Session with one part.

## Create a Session

1. To start creating a session, navigate through these pages: ILT > Manage Events & Sessions.

2. Find the Event you created in the previous exercise.

3. Under the Options column, click on the View Sessions icon (hover your mouse over each icon to learn your options here).

4. Click Create New Session.

5. On the Schedule Wizard page, enter the start date that you will remember (maybe the date of your next birthday?).

6. On the Parts Schedule page, complete the following fields (feel free to explore too):

   - Location – choose the location of this class (if you are stuck, feel free to search for "room" or "conference" and pick one of those locations).

   - Date and Time – adjust the start and end times if you'd like

   - Part Occurrence – in this exercise, our class will take place in one day in one location. Feel free to save this part and move on to the next page.

7. On the Details page, review the fields available to you.

   - Enter the location and date in the Session ID field

   | **Q1:** Did any fields pre-populate from the Event? Any new fields on this page? |
   |---|
   | **A:** |

8. On the Availability page, make this available to All Users and place a checkmark in all three boxes.

9. On the Pricing page, leave the default price of $0.

10. On the Training Units page, leave the first radio button selected.

11. Review your session on the Summary page and save the session

**Q2:**  Do you see the information you entered for the Session ID field? Search for the Event from an end user perspective by searching in the Search Box in the upper right of the page. Click on the Event title in your Search results – do you see the Session ID you entered? How might this be useful?

**A:**

# Exercise – Manage a Roster

**Objective**: Manage your roster for a session including updating attendance and marking the session complete

1. Copy the session you created earlier and make the date of the session for a week ago (in the past)

2. Enter **Roster** in the session ID field then Save the session

3. Go back to the page listing all sessions, and look for the session that shows "Roster" in the Session ID column

4. Click the **View Roster** icon  for this session

5. Click the **Add Users** link and select <u>5</u> users then click on the **Add Pending Users to Roster** button

6. Click the **Attendance and Scoring** sub-tab.

7. Check the attendance box for all users <u>except</u> for the first user.  No scores are necessary.

8. Change the completion date for the last user to 12/16/2017 by clicking on the edit icon, selecting the new completion date, and clicking on the blue diskette save icon

9. Click the **Submit Roster** button when complete, then the **OK** button in the pop up window

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| **Q1**: If you have clicked the Save button instead of the Submit Roster button what would be the results? |
|---|
| **A:** |

<br>

| **Q2**: What would happen to the user status in their transcript if you did not check the Pass box when you updated attendance? |
|---|
| **A:** |

**Q3**:  Refresh your browser and see if the completion has finished processing.

What if you made a mistake when you updated the attendance and forgot to mark someone as having attended?  What could you do? What if you incorrectly marked someone as attended and wanted to reverse it after submission of the roster?

**A**:

## Exercise – Manage a Waitlist

**Objective**: Manage waitlists and your roster for a session including updating attendance and marking the session complete

1. From the ILT Manage Events and Sessions page, search for the Event New CRM System Overview (Admin #)
2. Click the **View Sessions** icon  for this event
3. Find the session that shows "Waitlist" in the Session ID column
4. Click the **View Roster** icon  for this session
5. Click the **Waitlisted** link to manage the users on your waitlist
6. Ensure that the **Auto-register user upon granting waitlist** option is checked. Select **Grant** in the **Respond** column for **1** user on the waitlist.
7. Click **Process Responses**. You will get a message telling you that this will increase your maximum registration. Click **Yes**

### Withdraw a User

8. From the Roster, click on the **Remove Users** icon  for one user
9. <u>Do not check</u> the boxes: Do Not Charge Withdrawal Penalty and Do not Send Withdrawal Email
10. Select a **reason for withdrawal** and click the **Submit** button
11. The user should be now removed from your roster. Click the checkbox for **Show Withdrawn/Removed Users** to see this user

# Content Uploader

## Exercise – Download Course Zip Files

**Objective**:  Download the course zip files for use in the following Content Uploader exercises

### Download Zip file

1. Log in with your assigned Admin ID and password
2. Hover over the **New Connect** tab and click the **Knowledge Bank** sublink
3. Click on the **Topics** button
4. Click on the Topic title, **Files for Training**
5. Click on the Posting title, **Course Publishing File**

### For Internet Explorer (for Chrome or Firefox go to next section)

6. Click on the File title, **Test Course File.zip**
7. Click on **Save as** in the pop-up window (<u>DO NOT OPEN</u>)
8. Name the file, "Test Course" and save to your desktop

### For Chrome or Firefox

9. Right click on the File title and click on **Save link as…**
10. Name the file, "Test Course" and save to your desktop

11. Repeat the above steps for the **Content Uploader File for Reversioning**
12. Be sure to rename the file reversion file with a different name

## Exercise – Upload a SCORM course

**Objective**:  Upload a SCORM course using the Content Uploader

1.  To publish an online course, navigate through these pages: Tools > Learning > Content Uploader

2.  **Note:  You can also start creating your new Online Course from the Learning Console.**

3.  Drag and drop the file you saved to your desktop into the upload files area or click the **Select a file** button to upload your file

    - After your file finishes processing, select the provider of your choice

4.  Click on the **View Catalog** button

5.  From the Course Catalog page, find the course you uploaded by ensuring that the following are selected:

    - Status - Draft

    - Created by Me – checkbox is selected

6.  Click on the **Title** of the course

7.  Change the **Title** of the course again to "(Your Admin ID or Initials) Online Course"

8.  Also, edit the following:

    - Training Hours

    - Description

9.  For **availability**, select edit from the dropdown menu

    - Make this available to All Users and place a checkmark in all three boxes

10. Click on the **Subjects** tab and associate your course with any Subjects of your choice

11. Click **Save**

12. From the dropdown menu, click on the **Preview** button to test your course before publishing it

13. Click the **Publish** button to finalize the content uploading process

14. Request your Online Course and **complete** it.

_**NOTE: It can take up to 5 minutes for your online course to appear in the search results. If it does not appear, wait a few minutes, and try again.**_

# Exercise – Reversion a Course

**Objective**:  Create a new version of the course that's to be assigned to those users that already have it on their transcript

### Reversion an existing course

1.  Find your course in the **Course Catalog**
2.  Click on the **Title** of the course to view the course in the Course Console
3.  From the options menu select the **Create Version** option
4.  Drag and drop the file you saved to your desktop into the upload files area or click the **Select a file** button to upload your **Reversion Course** file
5.  After waiting a minute, click the **Refresh Status** button
6.  Preview the course to make sure it plays correctly
7.  Click **Next**
8.  On the versioning option page, make the following selections:
    - Effective Date – select today
    - Due Date – select Apply Previous Version Due Date
    - Version Equivalency – Requires Retraining
    - Training Status – Not Started, In Progress, Completed
    - Assignment Type – Users with previous version on Transcript
9.  Click the Refresh User List Button
10. Click the **Publish** button

| **Q1**:  What is the current version of this course? |
|---|
| **A:** |

| **Q2**:  When would you need to publish a new version of the course versus just modifying the content? |
|---|
| **A:** |

# Curricula Administration

## Exercise – Create a New Curriculum

**Objective**:  Create a New Curriculum

1. To start creating a curriculum, navigate through these pages: Admin > Catalog > Curricula.

2. **Note:  You can also start creating your new Curriculum from the Learning Console.**

3. Click on the **Create A New Curriculum** link

4. On the General page, complete the following fields (feel free to explore too):

   - Title – name your curriculum anything unique to find it again

   - Vendor – choose ABC Corporation (#)

   - Subject – choose a subject that applies to your Curriculum topic

   - Curriculum Player – check this box to display the UI (user interface) we have been seeing.

5. On the Availability page, make this available to All Users and place a checkmark in all three boxes.

6. On the Emails page, leave the default selection of System Defaults.

7. On the Pricing page, leave the default selection of Incremental Pricing (we'll come back to this page in a moment).

8. On the Structure page, check the "Allow this training to be assigned to the same user more than once" checkbox

9. Now let's add a Section and Learning Objects:

   - Click on the Add Section icon (hover over the icons to the right of the page to see which one that is).

   - Title it "Section 1."

   - To that section, add a few Learning Objects by clicking on the Add Training icon – pick any 3 LOs.

10. Take Notice: The Pay Upfront and Pre-Approve boxes are unchecked. Go back to the Pricing page and select Curriculum Price. Now come back to the Structure page. The boxes are checked! A wonderful shortcut for Admins even if you don't plan to charge for training.

11. Now we'll add another section:

- Click on the Add Section icon again (the one at the top of the curriculum, not the icon at the section you already have).

- Title it "Section 2."

- To this section, add a few Learning Objects by clicking on this section's Add Training icon – pick 3 different LOs.

12. Look at the boxes to the left of Section 1 and Section 2 – they are already sequenced. Sequence the LOs within Section 1 so that the first LO is labeled a 1, the second LO is labeled a 2, and the third LO is labeled a 3.

13. Save your curriculum and look for it under the Browse for Training page (Learning Tab > Browse for Training) or search for it by title in the top right-hand corner of the portal.

14. Request your curriculum and explore it.

**_NOTE: It can take up to 5 minutes for your curriculum to appear in search results. If it does not appear, wait a few minutes, and try again_**

| **Q1:** What setting on the Structure page dictates if your users will have to activate each LO within the curriculum before launching it? |
| --- |
| **A:** |

## Exercise – Curriculum Reversion

**Objective**: Reversion a Curriculum

1. Find the curriculum you created in the last exercise
2. Change the name of your curriculum
3. Click the **Save** button to save your change and answer this question:

| |
|---|
| **Q1:** Did this change reversion your curriculum? |
| **A:** |
| |

4. Find your curriculum again and click the **Edit** icon
5. Click on the **Structure** link
6. Change the structure of the curriculum by deleting a Learning Object from one of the sections and adding a new Learning Object in its place
7. Click **Save**
8. Reversion Options
   - **Version**: All Versions
   - **Status**: Apply changes to users **Not Started**, **In Progress**, and **Completed**
   - **Assign To**: Leave the default option selected – Users with Previous Version(s) on Transcript
9. Confirm
   - **Effective Date** – Immediately
   - **Allow users to maintain progress** – Yes
   - **Comments** – enter "Removed old training and added new training."
10. Click **Save**
11. Check to see that the new version of the curriculum was created by selecting the black plus sign ⊞ next to your curriculum title. Ensure version 2 is listed as the current version (Version 1.0 should appear grayed out) by refreshing your screen. It may take a few minutes to update to the new version.
12. When you see that the new version is the current version, check your transcript (under the **Learning** tab) to see if the curriculum has updated

**Q2:** What changes could you make to the curriculum that would not create a new version?

**A:**

**Q3:** Can you copy any version of the curriculum?

**A:**

# Materials Administration

## Exercise – Create a Material Using Upload Material

**Objective**:  Create a new material using the Upload Material option

> ***Create a Word document titled "Admin ID Training Material" and save it to your desktop to use in this exercise.***

1. To start creating a Material, navigate through these pages: Admin > Catalog > Materials
2. **Note:  You can also start creating your new Material from the Learning Console.**
3. Click on ⊕ **Create a New Material**
4. On the General page, enter the following information:
   - Title – name your material anything unique to find it again
   - Material Type – choose any type from the dropdown list
   - Provider – choose ABC Corporation (#)
   - Subject – choose a subject that best applies to your material topic
   - Material Source – click the **Upload Material** radio button
5. Click **Choose File** button and browse for and upload the document you created, titled "Admin ID Training Material"
6. **Localization** – leave the default English (US) and click the blue diskette icon 💾 to save the file
7. On the Availability page, make this available to All Users and place a checkmark in all three boxes.
8. On the Emails page, leave the default selection of System Defaults.
9. Request your material and complete it.

***NOTE: It can take up to 5 minutes for your material to appear in search results. If it does not appear, wait a few minutes, and try again***

# Exercise – Reversion a Material

**Objective**:  Create a new version of an existing material

## Create New Version

1.  Click on ⊞ **Create Version** icon for the "Admin ID Training Material" that you created in the previous exercise

2.  On the General page complete the following:

    - Material Source – Delete the current material file
    - Browse for and re-upload the document you created for the previous exercise, titled "Admin ID Training Material"
    - Localization – leave the default English (US) and click the blue diskette icon 💾 to save the file
    - Version Preference – select Append
    - Effective Date – select Immediately
    - Start Date – select 2 months from today's date

3.  Confirm that availability is set for All Users and that the Pre-Approved and Register Upon approval checkboxes are checked

4.  Leave **System Defaults** emails selected

5.  On the Reversion Options page make the following selections:

    - Status – Check the **Not Started, In Progress** and **Completed** boxes
    - Assign To – If necessary, select the "Users with Previous Version(s) on Transcript" option
    - Version Equivalency – leave default (Requires Retraining)

6.  Click the **Update User List** button

7.  Review the confirmation page and add a due date as well as comments if desired

8.  Check your transcript to confirm that both versions are listed.


***NOTE: It may take up to 5 minutes for the new material version to appear on your active transcript.  Refresh your browser as often as necessary.***

# Managing Course Catalog

## Exercise – Using Course Catalog

**Objective**:  Change Settings in a Learning Object through the Course Catalog

### Changing a Learning Object in Course Catalog

1.  To start editing a Learning Object, navigate through these pages: Admin > Catalog > Course Catalog

2.  Search for a Learning Object that you created earlier (material, online course, curriculum, Event/Session, etc.)

3.  Once your LO appears in the search results, click on its title

4.  Review the Course Console information, then from the dropdown option, select **Edit**

5.  Make the following Course Catalog edits:

    - Add a keyword (general page)

    - Add a subject

    - Include and require an acknowledgement

    - Change availability to **Suggested** for your Division – ABC Corporation (your Admin #)

    - Activate and require a Level 1 evaluation

6.  Save all your changes

# Learning Assignment Tool

## Exercise – Learning Assignment

**Objective**:  Assign a User into a Learning Object

1. To start creating a learning assignment, navigate through these pages: Admin > Learning Assignment Tool

2. **Note:  You can also start creating your new Assignment from the Learning Console**.

3. Click the **Create Assignment** button

4. Name your Assignment something unique so that you can find it again

5. Search for a Learning Object that you created earlier (material, online course, curriculum, Event/Session, etc.)

6. On the Options page, make the following selections:

   - Assignment Type – Standard

   - Training Assignment Workflow – Assigned, Approved, and Registered

   - Email Settings – leave Training Specific Emails and **Send Assign Training Emails**

7. On the Schedule page, make the following selections:

   - Processing Start Date – As soon as Assignment is submitted

   - Training Start Date – As soon as the training is assigned

   - Training Due Date – Relative date and 7 days from Date Assigned

8. On the Users page, select **your** admin ID (Pat Admin #) from the Users criteria

   - Do not check the **Include Subordinates** box

   - Click the **Generate Initial User List** button

9. Click **Next**

10. Confirm your selections, then click **Submit** to process the assignment

> **Q1**: If the LO is set to require approval, will this learning assignment override the approval requirement and put the LO into an approved status in the user's transcript?
>
> **A:**

# Exercise – Learning Assignment

**Objective**: Create a scheduled Learning Assignment with recurrence

1. Click the **Create Assignment** button

2. Name your dynamic Assignment something unique so that you can find it again

3. Search for a Learning Object that you created earlier (material, online course, curriculum, Event/Session, etc.)

4. On the Options page, make the following selections:

   - Assignment Type – Dynamic

   - Enable Dynamic Removal & Remove in Progress Training

   - Training Assignment Workflow– Assigned, Approved, and Registered

   - Email Settings – Training Specific Emails and **Send Assign Training Emails**

5. On the Schedule page, make the following selections:

   - Processing Frequency - Daily

   - Processing Start Date – Choose the specific date of tomorrow at 3:00am

   - Training Due Date – Relative and 7 days from Date Assigned

   - Recurrence – Enable Recurrence 1 year from Date Completed

6. On the Users page, select **your** admin ID (Pat Admin #) from the Users criteria

   - Do not check the **Include Subordinates** box

   - Enable Assign New Occurrence

   - Click the **Generate Initial User List** button

7. Click **Next**

   Confirm your selections, then click **Submit** to process the assignment

| |
|---|
| **Q1**: Why would you want to use the Processing Start Date feature? |
| **A:** |

# Exercise – Learning Assignment Options

**Objective**: Understand additional Learning Assignment Options

| **Q1**: When would you want to use a dynamic assignment versus a standard assignment? |
|---|
| **A:** |

| **Q2**: Can you stop a dynamic assignment from processing daily? |
|---|
| **A:** |

| **Q3**: You can enroll users into multiple LO's using a single Assignment. True or False. |
|---|
| **A:** |

| **Q4**: When would you want to create a Recurrence for a Dynamic Assignment? |
|---|
| **A:** |

| **Q5**: Can you create a Standard Assignment with a Fixed Assignment Date that is in the past? |
|---|
| **A:** |

# Email Management

## Exercise – Create a New Email

**Objective**: Create an email with tags for notifying a manager that a training request needs approval

1.  To start creating an email trigger, navigate through these pages: Admin > Email

2.  Click **Add email** for the **Request ILT Session** email trigger

3.  Configure this email trigger by making the following selections:

    - Email Title – enter "Admin (your Admin #) Exercise"

    - From Address – enter cesmail@csod.com

    - Reply-To Address – enter cesmail@csod.com

    - Type – select Notification

    - Send To – choose Next approver if training request is pending

    - Subject – enter "Request for Training Approval"

4.  **Message** – confirm the **HTML** radio button above the text box is selected. Confirm the **Design** button below the text box is selected. Enter the following in the text box:

    Dear MANAGER.FIRST.NAME MANAGER.LAST.NAME,

    TRAINEE.FIRST.NAME TRAINEE.LAST.NAME has requested training. Please respond to this approval request by:
    1. Logging into Learning System from the company intranet
    2. Click on the Approve training link on the Home page
    3. Select approve, defer, or deny

    Date of Request: ACTION.DATE
    Training: TITLE
    Details: SCHEDULE.DETAILS

    Please reply to this e-mail with any questions.

5.  Use the formatting Tools bar to format the message as desired (bold, italic, etc.)

6.  Click the **Save** button

| **Q1**: Which e-mail actions would you use to notify the Learner that the manager/approver approved a request for an ILT session? |
| --- |
| **A:** |

| **Q2**: Which e-mail actions would you use to notify the Learner that the manager/approver approved a request for an online course? |
| --- |
| **A:** |

| **Q3**: Which e-mail actions would you use to notify the leaner that training is past due (the date is after the scheduled event date) |
| --- |
| **A:** |

| **Q4**: Which e-mail actions would you use as a Reminder to a user that they are registered for a session the following day? |
| --- |
| **A:** |

# Exercise – Create a Custom Email for a Single Learning Object

**Objective**:  Create a custom email for a specific learning object

1. To start creating a custom email for a single LO, navigate to the Course Catalog (Admin > Catalog > Course Catalog)

2. Search for an LO that you created earlier (event/session, material, curricula, etc.)

3. Once your LO appears in the search results, click on its title

4. Review the Course Console information, then from the **Emails** settings dropdown option, select Edit

5. Select the radio button for **Custom Emails**

6. Customize the Training is Completed (student) email trigger by configuring the following fields:

    - Email Title – Training is Complete Student Notification

    - Type – Notification

    - Subject – Congratulations!  You have successfully completed TITLE training

7. **Message** – confirm the **HTML** radio button above the text box is selected. Confirm the **Design** button below the text box is selected.  Enter the following in the text box:

    Dear TRAINEE.FIRST.NAME TRAINEE.LAST.NAME,

    You successfully completed TITLE training on ACTION.DATE.  Be sure to print out your certificate for your records by clicking on the below link:

    CERTIFICATE.LINK

8. Use the formatting Tools bar to format the message as desired (bold, italic, etc.)

9. Click the **Save Email** button directly under the message box

10. Check the **Active** box to make this e-mail active

11. Click the **Save** button at the bottom of the page

**Q1**: What effect will your change have on the users who complete this learning object versus any other learning object in the system?

**A:**

**Q2**: If you wanted to send no emails for this LO, what would you do?

**A:**

**Q3**: If later you wanted to change your mind about customizing this e-mail and wanted to set back to the system defaults, what would you do?

**A:**

**Q4**: How do the email Title and email Subject differ from each other?

**A:**

**Q5**: If you set the availability option for this email to only the Finance department, what would the effect be on the users who registered for this session?

**A:**

# Exercise – Create a New Email for a Learning Assignment

**Objective**: Create an email with tags for using as a custom e-mail in a dynamic learning assignment

1. To start creating a learning assignment, navigate through these pages: Admin > Learning Assignment Tool

2. **Note: You can also start creating your new Assignment from the Learning Console**.

3. Click the **Create Assignment** button

4. Name your dynamic Assignment something unique so that you can find it again

5. Search for a Learning Object that you created earlier (material, online course, curriculum, Event/Session, etc.)

6. On the Options page, make the following selections:

   - Assignment Type – Dynamic

   - Enable Dynamic Removal & Remove in Progress Training

   - Training Assignment Workflow – Assigned, Approved, and Registered

7. Email Settings - Select Custom Emails

   - Click the **Set Custom Emails** button

   - Click **Add Email** icon for the **Register** Action

8. Configure this assignment email by defining the following fields:

   - Email Title – enter "Admin (your Training ID number) Exercise 2"

   - From Address – cesmail@csod.com

   - Reply-To Address – cesmail@csod.com

   - Type – Confirmation

   - Send to – Student

   - Subject – "You have been registered for TITLE training"

   - Message – enter the following in body of e-mail

        Dear TRAINEE.FIRST.NAME TRAINEE.LAST.NAME,

        Welcome to our Company!  A course titled TITLE is available in the Learning Management System.  Please log into the system and click **View Transcript** and **Launch** to play this course.  Please reply to this e-mail with any questions.

9. Click the **Save Email** button and then **Save and Exit**

10. Click Next

11. On the Options page, make the following selections:
    - Processing Frequency – Daily
    - Processing Start Date – As soon as Assignment is submitted
    - Training Due Date – 1 month from Date Assigned

12. On the Users page, select **your** admin ID (Pat Admin #) from the Users criteria
    - Do not check the **Include Subordinates** box
    - Click the **Generate Initial User List** button

13. Click **Next**

14. Confirm your selections, then click **Submit** to process the assignment

| **Q1**: Why would it be a best practice to enter text related to specifics of the course and the recipient (Welcome to Our Company etc.) in this e-mail when it would not be a best practice in an e-mail sent from the main email administration area? |
|---|
| **A:** |

| **Q2**: When will this email be triggered and sent? |
|---|
| **A:** |

| **Q3**:  Can you change or create a custom e-mail after you submit this learning assignment? |
|---|
| **A:** |

| |
|---|
| **Q4**: What will the Ad Hoc option in learning assignment emails do? |
| **A:** |

# Training Digest Emails

## Exercise – Create a Training is Past Due Email Digest

**Objective:** Create an Email Digest to be sent to the Manager at a specific time

### Create an Email Digest

1. To start creating a training digest email, navigate through these pages: Admin Tools > Core Functions > Email Digest Management

2. Click the Create Email Digest button and start configuring it using the following information:

   - Email Digest Title – give your digest email a name (Example: Admin ID – Training is Past Due every Tuesday notice)

   - From Address – cesmail@csod.com

   - Reply-To Address – enter cesmail@csod.com

   - Subject – Employees have training that is due

   - Frequency – Weekly

   - Day of Week – Tuesday

   - Time – enter 8:00 AM

   - Time Zone – set to (UTC-06:00) Central Time (US & Canada)

   - Admin Visibility – select the Talent Admins (including subordinates) group

   - Availability – select All Users

3. Click on the **Add Section** button

4. Select **Training is Due**

5. Configure the section as follows:

   - Section Name – Training is Past Due

   - Send Reminder – 1 week **AFTER**

   - Send To - click on the Select **Relation** dropdown to select and add **Trainee's Manager**

6. Next, we are going to format the body of the email. Click on the **Edit Body** button

7. We will use tags to pull in relevant information. Click on the link: Display a list of tags that can be used in the body of the email
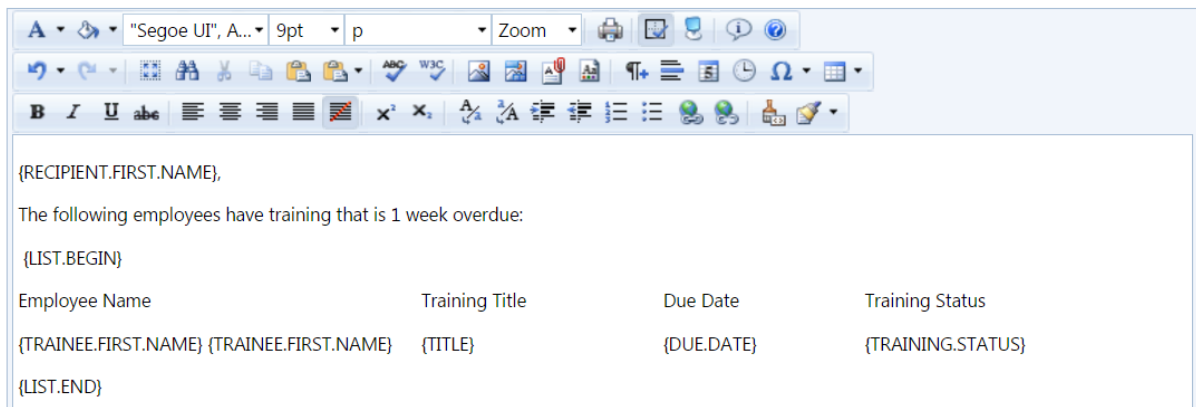
8.  Copy the tag {RECIPIENT.FIRST.NAME} by highlighting it and clicking CRTL + C on your keyboard

9.  Paste the tag into the body of the email by clicking CRTL + V on your keyboard.

10. Enter text, and copy tags so your email looks like this:

## Training Due

Display a list of tags that can be used in the body of the email

Language English (US)

{RECIPIENT.FIRST.NAME},

The following employees have training that is 1 week overdue:

{LIST.BEGIN}

| Employee Name | Training Title | Due Date | Training Status |
|---|---|---|---|
| {TRAINEE.FIRST.NAME} {TRAINEE.FIRST.NAME} | {TITLE} | {DUE.DATE} | {TRAINING.STATUS} |

{LIST.END}

11. After entering the above text, scroll to the bottom of the window and click the **Done** button.

12. Click on the **Preview Email** link to preview your email

13. Click the **Save** button.

# Standard Reports

## Exercise – Track Employees Reports

**Objective**: Determine effective track employee training reports for managers to use for a variety of circumstances.

Please note: The reports in this exercise are Track Employee reports, which means you can see results only for your subordinates using them. Even an administrator that has permissions to see all the users in a portal will see only their subordinates using these reports. Equivalent reports are available from the Training and ILT category of reports, which can be used to see the whole portal population, according to your permissions and constraints.

### Run a Transcript report

1. Log in using your assigned Admin ID and password

2. Hover your mouse on the **Reports** tab and choose the **Standard Reports** sublink

3. Click on the report title **Transcripts**

4. Click the **View** link next to **Baker, Pam** (click the **Next** link as this user appears in the 61-80 of 524 set of results)

5. View the employee's transcript details

6. On Pam's transcript page, click on the **Active** button and select "Completed" from the drop-down options

7. Click the title of the **Ethics Training** online course to view course details, print a certificate for the course, and see total views, and view time of the course

### Run a Past Due report

8. Go back to the Standard Reports page, Track Employees reports

9. Click on the report title **Past Due**

10. Set the date criteria **From**: 1/1/2010 **To:** today's date

11. Leave the rest of the criteria unspecified (which means we do not want to filter by training type, language, or training title)

12. Click the **Printable Version** link to view the report's results

# Exercise - Training Reports

**Objective**: Determine effective training reports for you to use for a variety of circumstances

## Run a Curriculum report

1. Log in using your assigned Admin ID and password
2. Click on the **Reports** tab and click the **Standard Reports** sublink
3. Click the **Training** category
4. Click on the report title **Curriculum**
5. Under **Advanced Criteria**, click on the diagonal arrow to choose a curriculum to include in the report
6. Search for and select **New Hire Curriculum**
7. Click on the **Printable Version** link to run the report
8. Note the gray header which displays the full name of each user who has the curriculum in their transcript
9. Go back to the report page, click the **Summary View** radio button, and run the report again by clicking the **Printable Version** link. Notice the change in information provided for the same curriculum

## Run an Enterprise Training report

10. Go back to the **Standard Reports** page
11. Click the **Training** category
12. Click on the report title **Enterprise Training**
13. **Date Criteria** – choose **Last 120 Days** from the dropdown
14. **Status** – click on the **Check All / Clear All** link to choose all training statuses as criteria
15. **Completion Date** – check the box for **Include column for completion date**
16. Click the **Search** button
17. Scroll down to see the report results
18. For the first line of results, click the **Details** button to the far right to see additional transcript details of the training item

### Run an Training Hours report

19.    Go back to the **Standard Reports** page

20.    Click the **Training** category

21.    Click on the report title **Training Hours**

22.    **Date Criteria** – delete date in the **From** field so it is blank, and leave **To** field populated with today's date

23.    **Training Type** – choose **Session** from the dropdown menu

24.    **Group By** – leave the radio button with its default option **Do not Summarize**

25.    Click the **Printable Version** link to run the report

26.    Review the report results

27.    Return to the report criteria page and change the **Group By** option to **Summarize by User** and run the report again

28.    Notice every user is indicated by a gray header and at the bottom of the report the total hours for the population is displayed


### Run an Training Progress Summary Pie Chart report

29.    Go back to the **Standard Reports** page

30.    Click the **Training** category

31.    Click on the report title **Training Progress Summary Pie Chart**

32.    **Training Title** – click the diagonal arrow to choose a training title

33.    Type **101** and click **Search**

34.    Click the blue plus sign next to the **Leadership 101** event to choose it

35.    **Transcript Status** – check the box **Include users who do not have this training item on their transcript or have not activated the training item**

36.    Click **Search**


### Run a No-Show report

37.    Go back to the **Standard Reports** page

38.    Click the **ILT** category

39.    Click on the report title **No-Show**

40. **Date Criteria** – delete date in the **From** field so it is blank, and leave **To** field populated with today's date

41. Do not complete any other fields

42. Click **Printable Version** to run the report and review general results

43. Return to the report criteria page and check the box to **Show Details** and run the report again to view the details that were added to the results

# Custom Reports

## Exercise – Custom User Report

**Objective**:  Create a User Report using the Report Builder tool and the Summarize function

1. To start creating a proxy enrollment, navigate through these pages: Reports > Custom Reports

2. Click the **New button**

3. From the Report Type list of options displayed select **User Report**

4. Title your report "Active User list by Manager"

5. From the User section, add the following fields:

   - User Full Name

   - User ID

   - Division

   - User Orig. Hire Date

6. Click on the **Refresh** button for a preview of your report

7. Set a Field Filter

   - User Status is Equal to Active

8. Set a User/OU Filter

   - Division - Train (include subordinates)

9. From the Summary tab summarize the report by:

   - User Manager Name

10. From the Sharing tab, select **Admin, Cornerstone** from the Users criteria

11. Click the **Save** button at the top of the page. Once you see the report successfully saved message, you may close

12. Click the **Close** button

13. Back in the Custom Report Folder view, the report "Active User list by Manager" will appear as **Processing**

14. Refresh your page (press F5 on your keyboard) until you see a date in the Last Run column. (Note: This may take up to 5 minutes.)

15. Click on the dropdown arrow under the Action column and click on the **View** option ⬚ to view your report

| Q1: Did your report summarize all the users by their manager? How many users have Charles Coy as their manager? |
| --- |
| Expand to see their details. |
| **A:** |

| Q2: How might a report of this type be useful to an organization? |
| --- |
| **A:** |

## Exercise – Create a Custom Transcript Report Using the Chart Function

**Objective**:  Create a custom transcript report using the Chart function

1.  From the Custom Reports home page, click the **New** button

2.  Select **Transcript Report**

3.  Enter "Training Completions by Type" in the Report Title field

4.  Add the following fields to your report:

    -   User Section - User ID

    -   Training Section - Training Type

    -   Transcript Section - Transcript Status

5.  Add the following field filters:

    -   Transcript Status is equal to Completed

    -   Training Type is <u>not</u> equal to Event (this will eliminate duplicate results with session completions)

6.  Click on the **Refresh** button for a preview of your report

7.  From the Sharing tab, select **Admin, Cornerstone** from the Users criteria

8.  Click the **Chart** tab and make the following selections:

    -   Summarize by - Training Type

    -   Measure – Count by User ID

    -   Chart - Pie

9.  Click the **Save** button to save the report

10.  After the successful save message appears, click the **Close** button to close the report

11.  Back in the Custom Report Folder view, the report "Training Completions by Type" will appear as **Processing**

12.  Refresh your page (press F5 on your keyboard) until you see today's date in the Last Run column

13.  Click the Actions arrow and click on the **Chart** option to view the Chart you created

# New Knowledge Bank and Communities

## Exercise – Create a Knowledge Bank Topic

**Objective**: Create a topic in Knowledge Bank

1. To start creating a knowledge bank topic, navigate through these pages: New Connect > Knowledge Bank

2. Click the **Topics** button

3. From the options dropdown, create a Topic using the following information:

   • Name – name your topic anything unique to find it again

   • Description – enter a topic description

   • Availability Selection Criteria – select All Users and click the Add button

   • Action Group for all users – select Visitor

4. Next, we will add an Expert to the topic, who will be able to answer Q & A's that are posted, by doing the following:

   • Availability Selection Criteria – select **Laura Smith** from Users.  Do not check Include Subordinates

   • Action Group for Laura Smith - select Expert

5. Click **Done** to create your topic

| |
|---|
| **Q1**:  You set the Action Group for All Users to Visitor. What will employees be able to do in this topic? |
| **A:** |

| |
|---|
| **Q2**:  You set the Action Group for Laura Smith to Expert. What will Laura be able to differently from all other users? |
| **A:** |

| |
|---|
| **Q3**:  If you wanted to select a set of people to have the rights to upload documents, and create a new discussion, what would you do? |
| **A:** |

# Exercise – Add a File to a Knowledge Bank Topic

**Objective**: Upload a document and mark it as Featured in a Topic

***<u>Open Word and create a new document to use in this exercise. Type the word Agenda in the document. Name the document "Training Agenda" and save to your Desktop</u>***

1.  From the Topic you previously created, click the **Create Posting** button dropdown then do:
    -   Select Create File
    -   Title – give your file posting a title
    -   Upload – the Word document you created ("Training Agenda")
    -   Body – enter information about your file posting (example: description of information it contains, etc.)
    -   Click Done
2.  Click on the title of the file posting you previously created
3.  Click the **Options** button dropdown (right of the Training Agenda title)
4.  Select the **Mark as Featured** option
5.  Click the **Cancel** button
6.  Navigate back to the knowledge bank landing page

| **Q1**: What does the Mark as Featured option do? |
| :--- |
| **A:** |

## Exercise – Edit Topics and Delete Items

**Objective**:  Edit a topic; delete individual items in a topic, and the topic itself

1. To edit a topic, click on the Title of the topic you previously created
2. Click on the **Manage Topic** button dropdown and answer this question:

| **Q1**: What are your options under Manage Topic? |
|---|
| **A:** |

3. Click on the **Edit Topic** link
4. Modify the **Description**
5. Click **Done**
6. To delete a topic, click on the **Topic** title that you created
7. Click on the title of the file posting you added
8. Click on the **Options** dropdown menu
9. Click on **Delete** File
10. Click the **Delete** button in the deletion confirmation window

# Exercise – Create a Community

**Objective**:  Create a Community and add a Topic

1. To start creating a knowledge bank topic, navigate through these pages: New Connect > All Communities

2. Select **Community** from the New Community dropdown box then add the following information:

   - Title – give your Community a unique name

   - Description – describe your Community

   - Community Feed - On

   - Membership - Leave as Invitation (this means that Users that fall within availability see a "Join" button on the Community Main page, and then become a part of the community after clicking "Join".)

   - Availability Selection Criteria – select the Talent Admins (including subordinates) group

   - Action Group – select Member

3. Add a Community Moderator:

   - From the **Select OU Criteria**, select Kathryn Johnson from the **Users** criteria

   - Under **Action Group** for Kathryn select Community Moderator

4. Click the **Done** button and answer this question:

   | **Q1**: What is the result of setting the action Group to Member for the Talent Admin groups? What will Kathryn Johnson be able to do as Community Moderator? |
   | --- |
   | **A:** |

5. Now let's add a Topic to this Community by:

   - Clicking on the **Create Topic** button under Options

   - Title – give your Topic a unique name

   - Description – describe your topic

6. Click on the trashcan icon to remove the current availability associated with the topic

7.  **Availability Selection Criteria** – from the groups criteria, select "Talent Admins 1-15" and "Talent Admins 16-30" which are children of the Talent Admin group

8.  Change the action group for each group from Member to **Visitor**

9.  Click the **Done** button

10. To create the topic posting:

    - Click **Create Posting** button and select **Create Discussion**

    - Title – enter give your posting a unique title

    - Body – enter information about your discussion posting (example: description of information it contains, etc.)

11. Click the **Attach a link** icon

12. Enter www.cornerstoneondemand.com in the URL field and click the **Add link** icon

13. Click **Done**

14. From the **Options** button dropdown, select **Mark as Featured**

15. Click on your Community sublink at the top of the page

| |
|---|
| **Q2**: Who can view this topic and what can they do with regards to this topic? Who can't view this topic? |
| **A:** |

| |
|---|
| **Q3**: What are some of the things you can do as an Admin from this page? |
| **A:** |

16. Follow these steps to share your topic with another Community:

    - Click on the title of Community Topic that you created earlier

    - From the Manage Topic dropdown menu, select the **Edit Topic** option

    - In the Shared to Communities field, click on the **Search** Icon

17. Select another Community of your choice

18. Click on **View Availability** to view how availability is set for the Community you have chosen

19. Click the **Add** button to add the availability of the community to the availability of the shared topic

20. Click **Done**

## Exercise – Auto enroll users in a Community

**Objective:** Auto enroll users to a community

1. From the New Community dropdown box, select Community then add the following information:

   - Title – give your Community a unique name

   - Description – describe your Community

   - Community Feed - On

   - Membership – select Auto-enrollment

   - Availability Selection Criteria – select the Talent Admins (including subordinates) group

   - Action Group – select Member

2. Add a Community Moderator:

   - From the **Select OU Criteria**, select Kathryn Johnson from the **Users** criteria

   - Under **Action Group** for Kathryn select Community Moderator

3. Click the **Done** button

| |
|---|
| **Q1**: What is the difference between this community and the one you first created? |
| **A:** |

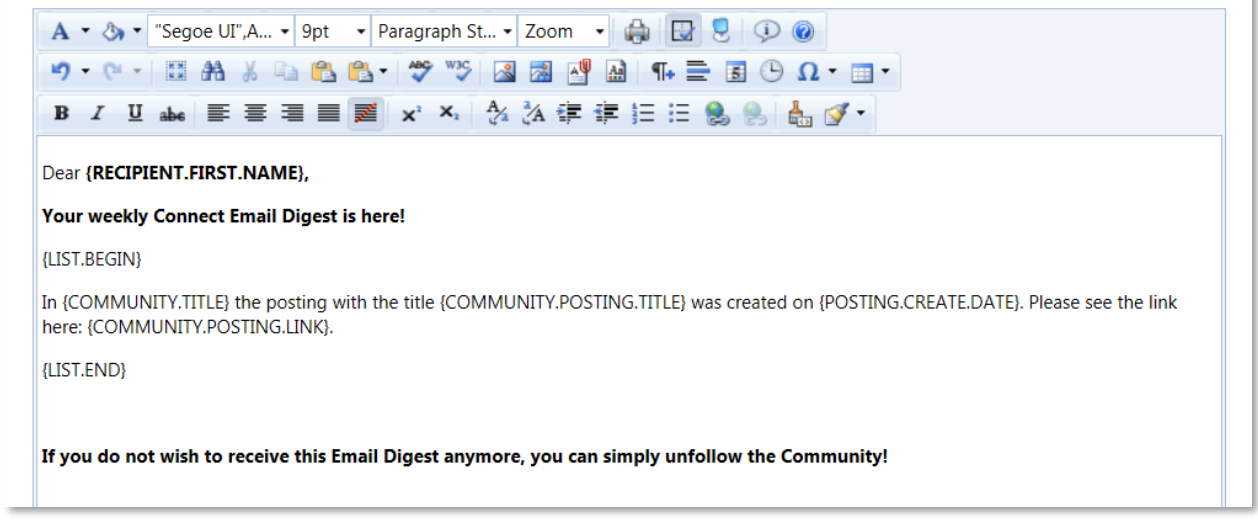| |
|---|
| **Q2**: When would you use auto-enroll for a community? |
| **A:** |

# Connect Digest Emails

## Exercise – Create a Community Postings Email Digest

**Objective:** Create an Email Digest to be sent to Community Moderator at a specific time

1. To start creating a training digest email, navigate through these pages: Admin Tools > Core Functions > Email Digest Management

2. Click the Create Email Digest button and start configuring it using the following information:

   - Email Digest Title – give your digest email a name (Example: Admin ID – News from Connect)

   - From Address – cesmail@csod.com

   - Reply-To Address – enter cesmail@csod.com

   - Subject – Your News from Connect

   - Frequency – Weekly

   - Day of Week – Tuesday

   - Time – enter 8:00 AM

   - Time Zone – set to (UTC-06:00) Central Time (US & Canada)

   - Admin Visibility – select the Talent Admins (including subordinates) group

   - Availability – select All Users

3. Click on the **Add Section** button

4. Select **Communities Postings**

5. Click on the Select **Relation** dropdown to select and add **Community Moderator**

6. Next, we are going to format the body of the email. Click on the **Edit Body** button

7. We will use tags to pull in relevant information. Click on the link: Display a list of tags that can be used in the body of the email

8. Copy the {RECIPIENT.FIRST.NAME} tag and paste it into the body of the email

9. Enter text, and copy tags so your email looks like this:



**Communities Postings**

Dear {RECIPIENT.FIRST.NAME},

**Your weekly Connect Email Digest is here!**

{LIST.BEGIN}

In {COMMUNITY.TITLE} the posting with the title {COMMUNITY.POSTING.TITLE} was created on {POSTING.CREATE.DATE}. Please see the link here: {COMMUNITY.POSTING.LINK}.

{LIST.END}

**If you do not wish to receive this Email Digest anymore, you can simply unfollow the Community!**

10. After entering the above text, scroll to the bottom of the window and click the **Done** button.

11. Click on the **Preview Email** link to preview your email

12. Click the **Save** button.

# Approval Workflow

## Exercise – Creating an Approval Workflow Template

**Objective**:  Create a workflow template that changes the approval process from the default template and apply it to a specific learning object

1. To start creating approval workflow templates, navigate through these pages: Admin > Tools> Learning > Learning Preferences > Default Approval Workflow Templates

2. Click on Create New Approval Template link

3. Name your template anything unique to find it again

4. Click the blue plus sign ✚ next to Approval Step Number

5. For step 1 select and add any desired **employee relationship**

6. Click the blue plus sign ✚ next to Approval Step Number to add a second approval step

7. For step 2 select and add the **Classroom Instructors** Group

8. Click the **Save** button at the bottom of the screen to save the template

9. From the Course Catalog (Admin > Catalog > Course Catalog) search for and edit any learning object that you created

10. Click the **Approval Workflow** tab

11. Select the division called **New Employees** from the Select Criteria dropdown

12. **Effective Period** - Leave the "To:" field blank

13. Select the template you created from the dropdown

14. Return to the top of the page, below **Define Approval Workflow by OU Rules**, select **Position** from the dropdown

15. Search and select the **Project Manager** position**.**

16. **Effective Period** - Leave the "To:" field blank

17. Below the Effective Period, select the **System Generated Template** from the dropdown

18. Click the **Save** button at the bottom of the screen to save the approval workflow

# Exercise – Create a Custom Page

**Objective**:   To create a new custom page and tab for the Anonymous User

## Create  a Custom Page

1.   Log in using your assigned Admin ID and password

2.   Click the **Admin > Tools** tab and click the **Core Functions** link

3.   Click the **Core Preferences** link

4.   Click **Custom Pages** under Cross-Platform Preferences

5.   Click **Create Custom Page**

6.   Set the number of columns to **2** and <u>check the box</u> for a **Header Row**

7.   Click **Apply**

8.   Enter "Welcome(Your Admin ID)" into the **Name** field

9.   Drag and drop the **Image** widget into the top row, select the saved image **people.gif** from the dropdown menu

10.   Click on the **Save** button

11.   Drag and drop the **HTML** widget into the left column of your layout

12.   In the **Widget Settings** box enter "Welcome to the ABC LEARNING PORTAL!"

13.   Change the font text to size **6**, the font to **Arial,** the color to **dark blue**, and **Center** align your text

14.   Hit **Enter** twice to create a space underneath the existing text and type "Click below to find featured Compliance training," change the size to **4**

15.   Click the **Save** button

16.   Drag and drop the **Image** widget into the left column underneath your text. In the **Saved Images** dropdown select **Button3.jpg** image.

17.   In the **Link (optional)** field enter:
/catalog/searchadvanced.aspx?keywords=compliance&searchType=1

18.   Click the **Save** button

19.   Drag and drop the **Formatted Message Box** into the right column

20.   Enter "New Training Available" in the title field

21.   Enter in the following text in the text field:

   - Web Design
   - Data Security

- Advertising
- Technical Writing

22. Click the **Save** button

23. Click the **Save and Exit** button to save your custom page

24. Click the **Admin** > **Org Units**

25. Click **Manage Self Registration Groups**

26. Click the **Edit** icon 📝 for the Self Registration group you created in the last exercise (Admin ID Group) and go to the **Guest User Settings** Page (the last step in the process)

27. Scroll to the middle of the page, to the **Navigation Tabs & Links** section and click the **Add New Tab** link

28. Name your tab "Compliance"

29. Click **Save**

30. Click on the **Add** Page icon 🗔. In the **Select Page** pop up, click on the **Add** icon ➕ for your custom page titled **Welcome (Your Admin ID)** (on page 2)

31. Click the **Submit** button at the bottom of the page to save your changes

| **Q1**: Open a new Explorer window and Log into the URL you wrote or copied down in step 26 of the first exercise.<br><br>Do you see your new Compliance tab? Click on it to see your new custom page. Does the link on the graphic (Compliance Training button) work? Where does it take you? |
| --- |
| **A:** |

| **Q2**: What are some ideas for creating custom pages for extended enterprise? |
| --- |
| **A:** |