Job Aid: Edit Instructor-Led Items

Purpose

The purpose of this job aid is to guide administrators through the step-by-step process of editing an instructor-led item. Related terminology is provided.

In this Job Aid, you will learn how to:

- Identify Item Classification and Review Summary Tab
- Configure Item: Design Data Tab
- Configure Item: Delivery Data Tab
- Configure Item: Catalog Tab
- Configure Item: Subject Areas Tab
- Configure Item: Notifications Tab

Terminology:

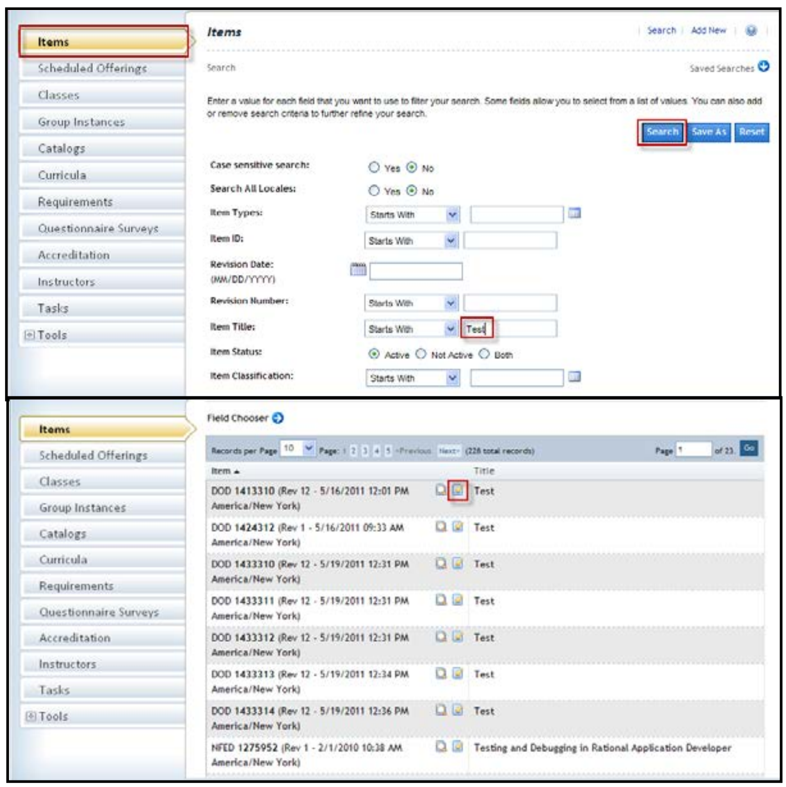
- **Classification:** There are four classifications in the system: Instructor-led, Online item, Blended (both online content and instructor-led content), and Other (such as physical goods). Classifications are automatically assigned based on item segments and/or online content.
- **Item Tabs:**
    - **Design Data Tab**: Information on this tab includes:
        - Reviser and approver name with approval date
        - Default credit hours
        - Default Initial Assignments: These fields determine how long a user has to complete an item from when it was placed in his/her Learning Plan/To-Do List.
        - Default Retraining Assignments: The length of time users have to re-take and complete an item after initial completion. These fields are used only when the item is assigned as part of a curriculum.
        - Contact's email (this works with the Item Scheduling Demand APM)
    - **Item goals - Delivery Data Tab:**
        - Default Minimum Registration: When the number of users who have requested registration for this item reaches this number, an email is sent to the contact (found in Design Data tab) to recommend scheduling this item.
        - Default Maximum Registration
        - Prep Time (instructor)
        - Self Registration checkbox
        - Default Segment Structure: Establishes timeframes and identifies location types, materials, and types of equipment for scheduling an instructor-led course
        - Default Location Type

- **Catalog Tab:** A catalog is used to make items that are not a part of the Learning Plan viewable to users. Access to one or more catalogs is based on assignment profiles. In order for a user to view an item that is not in his/her Learning Plan, the admin must add the item to a catalog. An item may reside in multiple catalogs and have a different price associated in each. In order for a user to self-assign an item or self-register in a scheduled offering of an item, the item must reside in a catalog.
- **Subject Area Tab:** Users have the ability to browse catalogs by subject area. An item can be associated with one or more subject areas.
- **Notification Tab:** Users have the ability to change the message within the notification associated with an item and to attach additional documents to the notification such as pre-reading or work.

Task A. Identify Item Classification and Review Summary Tab

Note: Verify that the **Admin** tab is selected.

1. Navigate to **Learning > Items** and search for an item to edit.

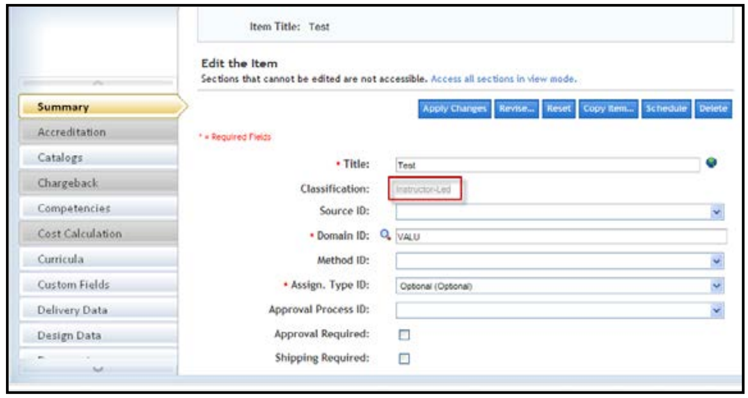


2. Click the **Edit** icon for the item. By default the system opens the item record to the **Summary** tab.

The item **Classification** is auto-assigned and identified on the Summary tab.

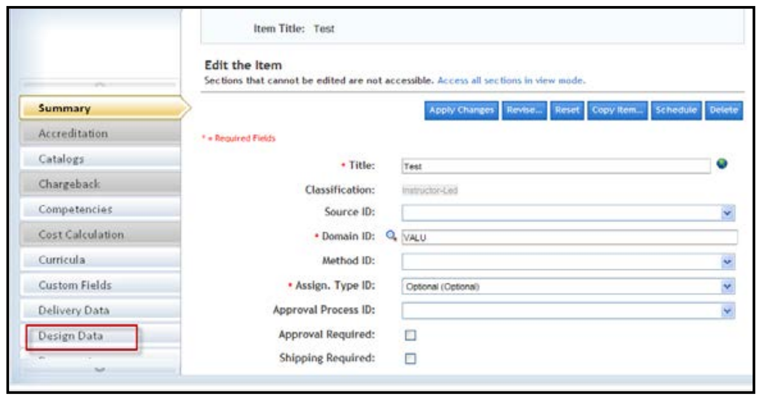
On the Summary tab, you can assign an item source, domain, delivery method, and assignment type to the item. You can also view and maintain a description of the item, and assign a create date.

Note: Click the **Help** link at the top of the page for additional information on the Summary tab.

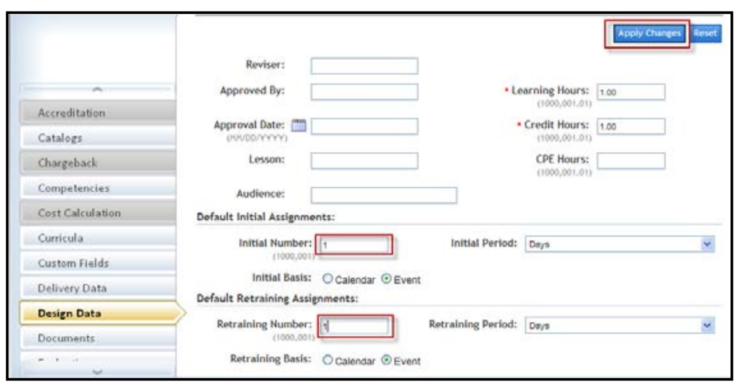


Task B. Configure Item: Design Data Tab

1. Select the **Design Data** tab.
   Use this screen to review and revise design information for the selected item including the name of the reviser and approving official or group, default credit values of the item, default initial period, and default retraining interval.

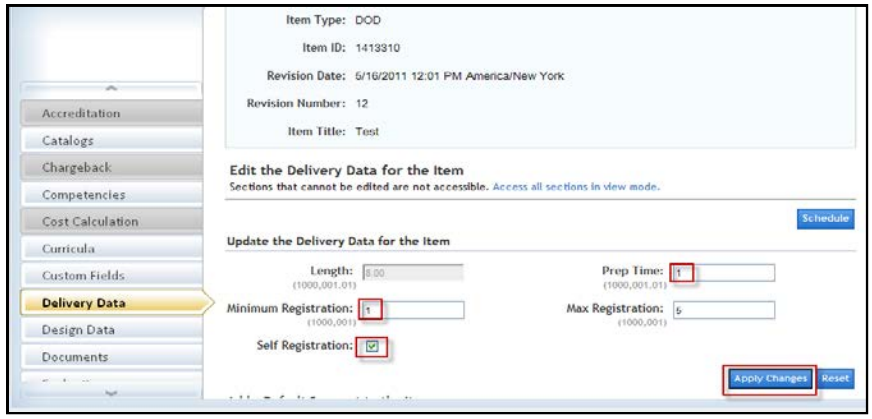


2. Enter the **Default Initial Assignments** and the **Default Retraining Assignments**.
   Note: Click the **Help** link at the top of the page for additional information on period-based item assignments.
3. Click **Apply Changes**.
   Tip: Any of the defaults that are defined on this page can be overridden in the individual scheduled offerings, learning events involving scheduled offerings, or learning events involving this item or any curricula in which the item may be included.



Task C. Configure Item: Delivery Data Tab

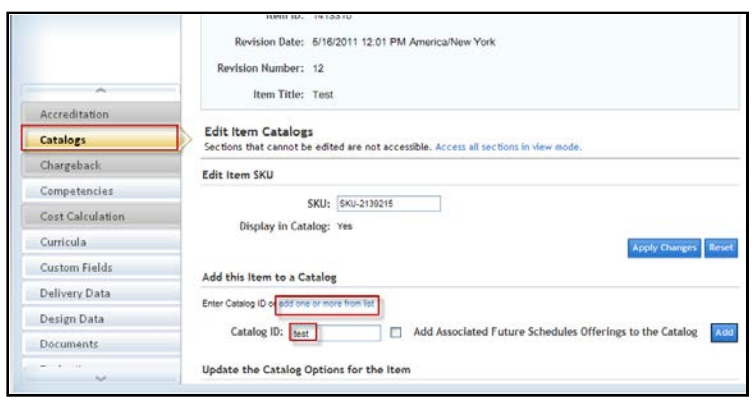
1. Select the **Delivery Data** tab.
   On this page you can review and update details about the delivery of the selected item. You can also establish the default scheduling information for the item which includes how the item is scheduled and delivered into segments, its default location type, and what equipment and materials are required for each segment of the item.



2. Enter the **Length** and **Prep Time** (in hours), as well as the **Minimum** and **Maximum Registration**.
3. Click the **Self-Registration** checkbox if this is an option that should be available to users.
4. Click **Apply Changes**.

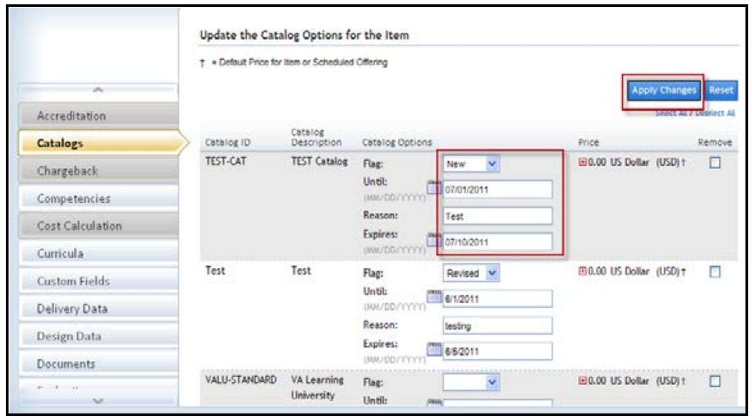
Task D. Configure Item: Catalogs Tab

1. Select the **Catalogs** tab.
2. Verify the field **Display in Catalog** states **Yes**.
3. To add this item to a catalog, enter a **Catalog ID** exactly, or click the **add one or more from list** link to search for the desired catalog(s) in which to add the item.
4. Click **Add**.



Verify that all selected catalogs are displayed.

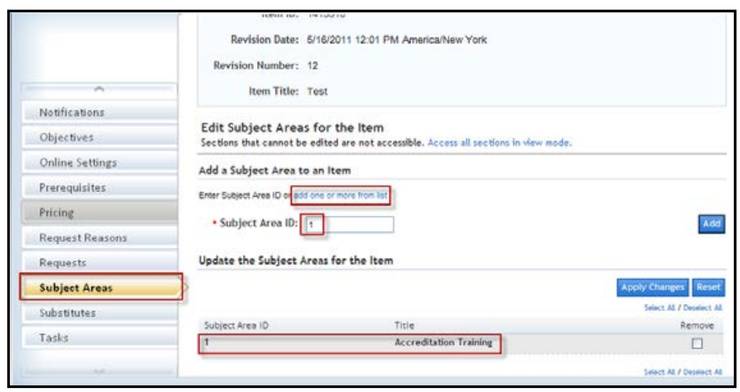
1. To modify catalog options, click the **Flag** drop-down box and select one of the displayed options.
2. Enter an **Until** date.
3. Enter a **Reason**.
4. Complete the **Expires** field (if desired).
5. Click **Apply Changes**.



Notes:
Flag: A flag that appears with the item in the catalog.
Until: The date that the flag no longer appears with the item in the catalog.
Reason: What users see for why they should be interested in this item when viewed on their home page or in the catalog.
Expires: The date after which the item is automatically removed from the catalog by the purged expired catalog APM.

Task E. Configure Item: Subject Areas Tab

1. Select the **Subject Areas** tab.
2. To add a subject area to this item, enter a **Subject Area ID** exactly, or click the **add one or more from list** link to search for the desired subject area(s).
3. Click **Add**. Verify the subject areas added appear on the screen.



Task F. Configure Item: Notifications Tab

1. Select the **Notifications** tab.
2. In the section **Override Learning Expiration Notification Defaults**, select the **Email Recipients**, **Threshold**, and **Reminder Period**.
   This page allows you to review and change the content of notifications sent to users, instructors, supervisors, and others (specified in the Contacts tab) regarding this item.
   The following notifications are available:
   - Scheduled Offering Cancellation
   - Registration
   - Withdraw
   - Waitlist
   - Waitlist Removal
   - Pending
3. Make necessary edits to the notification **Subject Line** and **Body**.
4. Click **Preview** to view a sample of the notification.
5. Click **Apply Changes**.
6. To add an attachment, click the **Browse** button in the **New Attachment** field to search for and add a file.
7. Click **Apply Changes** once the correct path to the attachment displays.