

Job Aid: Record Learning - Financial

Purpose

The purpose of the Record Learning – Financial job aid is to guide you through the step-by-step process of using the Learning Event Recorder. Related terminology is provided.

In this Job Aid, you will learn how to:

- Use Learning Event Recorder to Record Completion of Item – Financial
- Use Learning Even Recorder to Record Attendance at External Event
- Use Learning Event Recorder to Record Completion of Scheduled Offering
- View User Learning History tab
- Edit Learning Event Using Learning Event Editor

Terminology:

Learning Event: A learning event is the record of:

- A completed item
- An unsuccessful attempt to complete an item
- A record of the attendance or completion of any external event that is considered important enough to document but not related directly to learning needs.

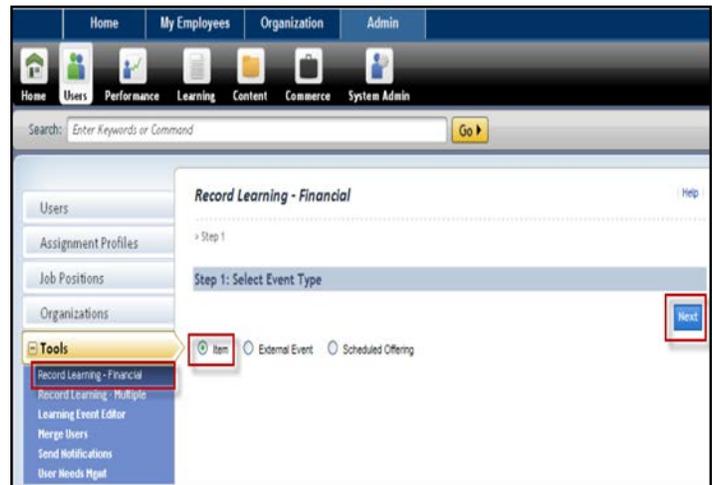
Types of Learning

- **Item Based Events:** Items are the primary events found in the list of learning events for users. Learning events for items include those created as scheduled offerings and those with online content where the system records the learning event when the user completes the content. All items may have a learning event recorded against them for any user, even if the item was not a part of his/her Learning Plan.
- **External Events:** A learning activity outside of the organization, such as a college course or a seminar, for which there is no item record in TMS , which may be recorded in a user's Learning History.
- **Scheduled Offering:** An item or learning event with a scheduled date and time.

Task A. Use Learning Event Recorder to Record Completion of Item - Financial

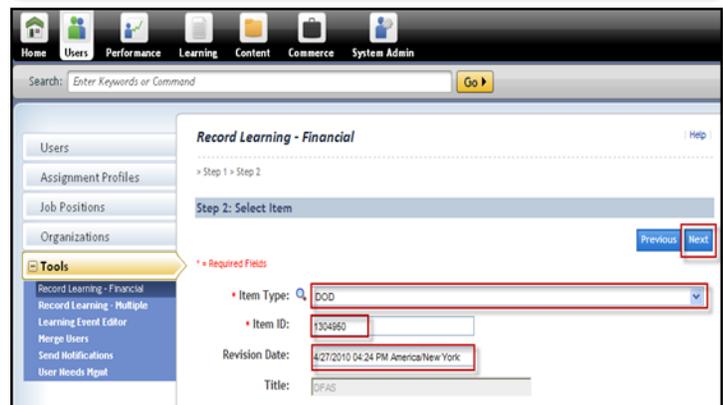
Note: Verify that the **Admin** tab is selected.

1. Navigate to **Users > Tools > Record Learning – Financial** or enter **Record Learning** in the **Search** box at the top of the screen. *Step 1: Select Event Type* of the Record Learning - Financial wizard displays.
2. Select the **Item** radio button.
3. Click **Next**. *Step 2: Select Item* of the Recording Learning Financial wizard displays.



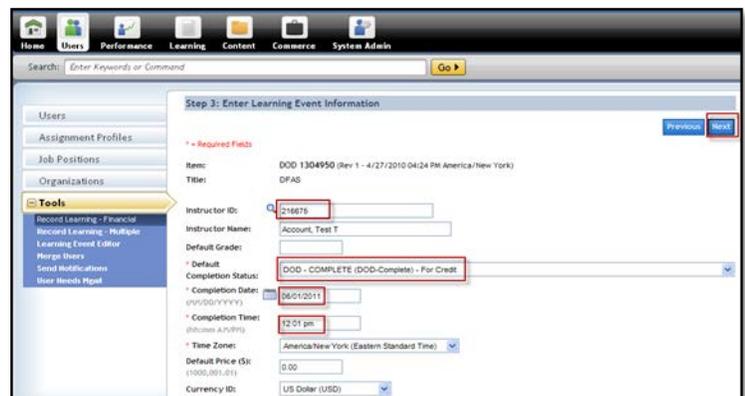
The screenshot shows the 'Record Learning - Financial' wizard at Step 1: Select Event Type. The 'Item' radio button is selected, and the 'Next' button is highlighted. The search box at the top contains 'Record Learning'.

4. Select the **Item Type** from the drop-down menu or click the **Search** icon to search for and select an item type.
5. Enter the **Item ID** in the textbox exactly.
6. The **Revision Date** field is automatically populated but can be modified if necessary.
7. Click **Next**. *Step 3: Enter Learning Event Information* of the Record Learning -Financial wizard displays.



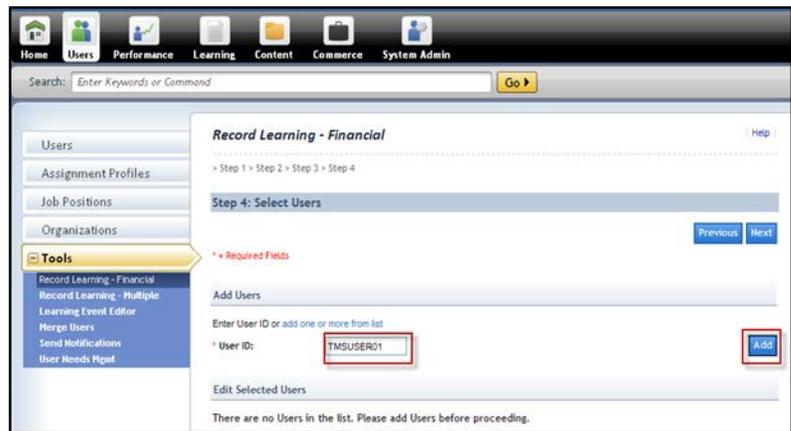
The screenshot shows the 'Record Learning - Financial' wizard at Step 2: Select Item. The 'Item Type' is set to 'DOD', 'Item ID' is '1304950', and 'Revision Date' is '4/27/2010 04:24 PM America/New York'. The 'Next' button is highlighted.

8. Fill in all of the required data fields (*)
9. Click **Next**. *Step 4: Select Users* of the Recording Learning Financial wizard displays.



The screenshot shows the 'Record Learning - Financial' wizard at Step 3: Enter Learning Event Information. Fields include Item (DOD 1304950), Title (DFAS), Instructor ID (216876), Instructor Name (Account Test T), Default Grade, Completion Status (DOD - COMPLETE (DOD-Complete) - For Credit), Completion Date (08/01/2011), Completion Time (12:01 pm), Time Zone (America/New York (Eastern Standard Time)), Default Price (\$), and Currency ID (US Dollar (USD)).

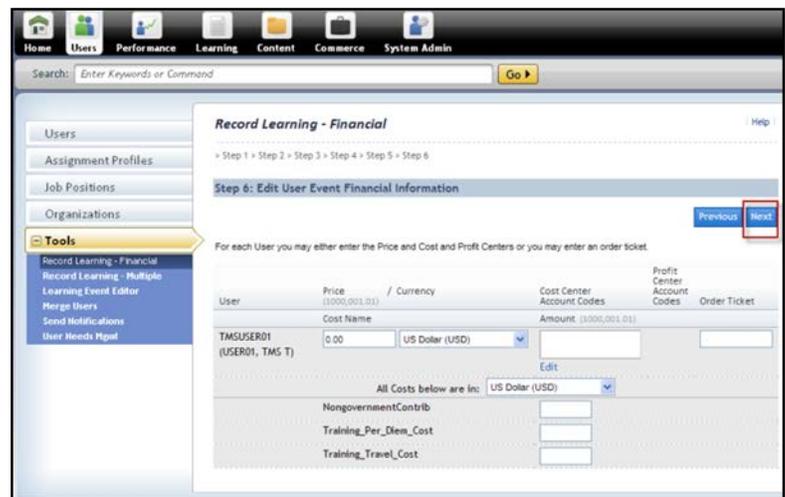
10. Enter a **User ID** exactly.
11. Click **Add** or click the **add one or more from list** link to search for and select one or more users.
12. Once all users have been added, click **Apply Changes**.
13. Click **Next**. *Step 5: Edit User Event Information* of the Recording Learning Financial wizard displays.



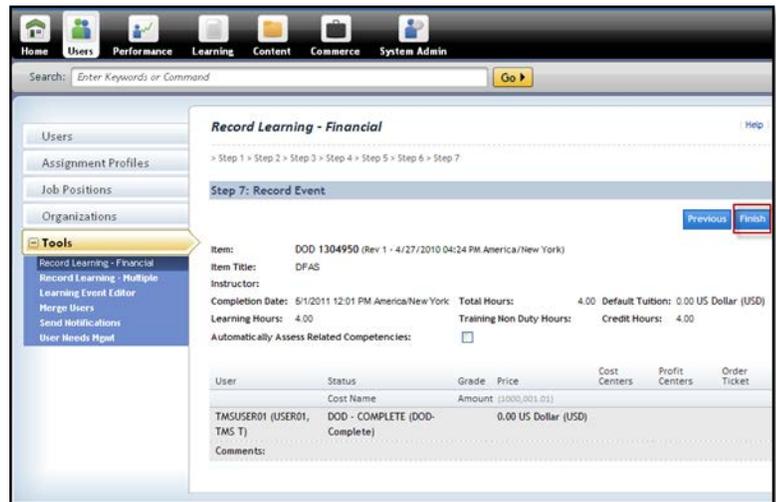
14. Indicate the user's **Status** by selecting an option from the drop-down menu.
15. Enter **Comments** (optional).
16. Enter or adjust **Grade** (optional).
17. Click **Next**. *Step 6: Edit User Event Financial Information* of the Recording Learning – Financial wizard displays.



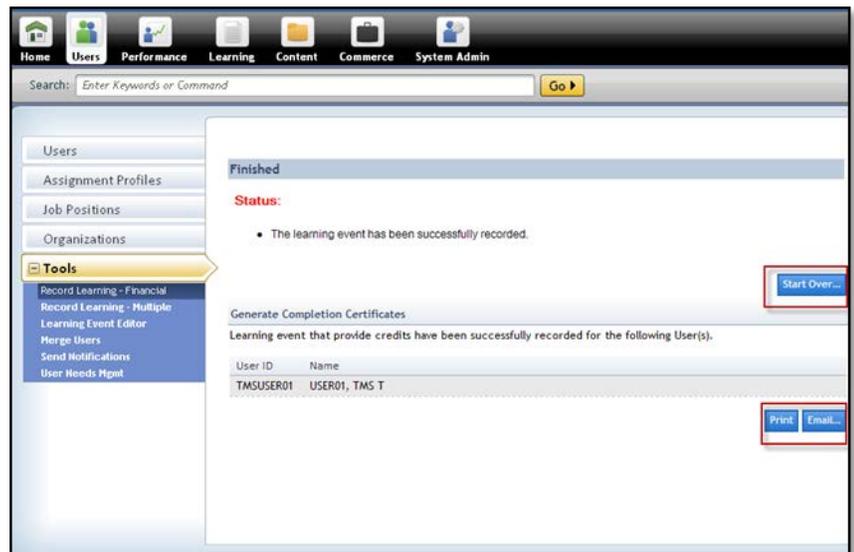
19. Enter any relevant financial information about the learning event.
Note: If you enter a Price, you must also enter a Cost Center Account Code in order to proceed.
20. Click **Next**. *Step 7: Record Event* of the Recording Learning – Financial wizard displays.



21. Review the learning event information.
22. Click **Finish**. The application provides a status to let you know that the learning event has been recorded successfully.



23. Click **Print** to print a completion certificate report for each user listed
24. Click **Email** to email a completion certificate report to each user listed.
25. Click **Start Over...** to begin the Learning Event Recorder process again. This retains all users previously selected.

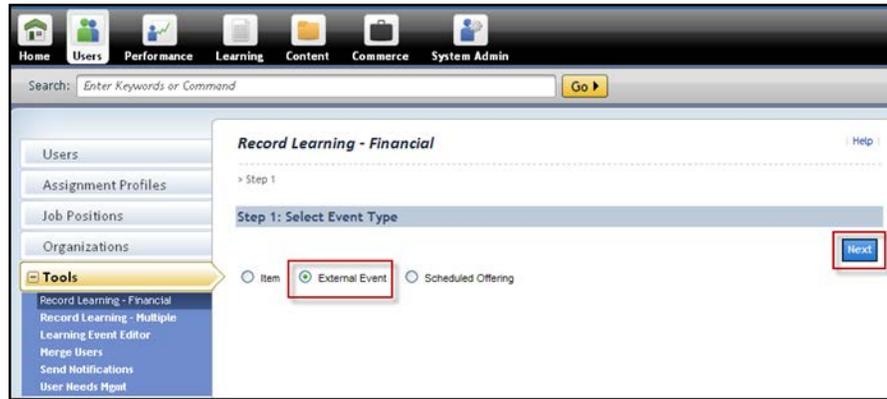


Task B. Record Attendance at External Event by Adding a User

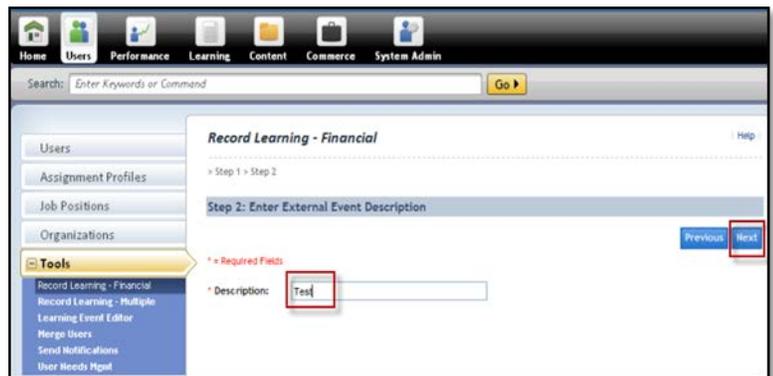
Talent Profile: Accessing

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

1. Navigate to **Users > Tools > Record Learning – Financial**. *Step 1: Select Event Type* of the Recording Learning – Financial wizard displays.
2. Select the **External Event** option.
3. Click **Next**. *Step 2: Enter External Event Description* of the Recording Learning – Financial wizard displays.



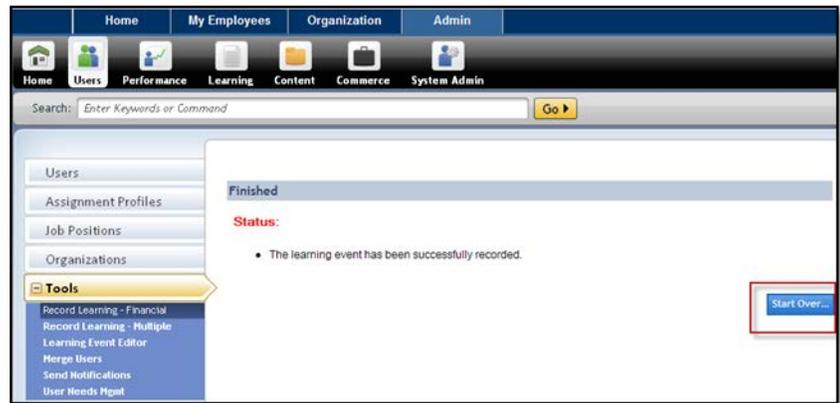
4. Enter a **Description** of the external event.
5. Click **Next**. *Step 3: Enter Learning Event Information* of the Recording Learning – Financial wizard displays.
6. Complete Steps 7-21 in Task A above.



7. Click **Finish**. A pop-up may appear requesting that the page refresh before you proceed.
8. Click **OK**.



9. The application provides a status that the learning event has been recorded successfully.
10. Click **Start Over....** to begin the Record Learning – Financial process again. This retains all users previously selected.



Task C. Use Learning Event Recorder to Record Completion of Scheduled Offering

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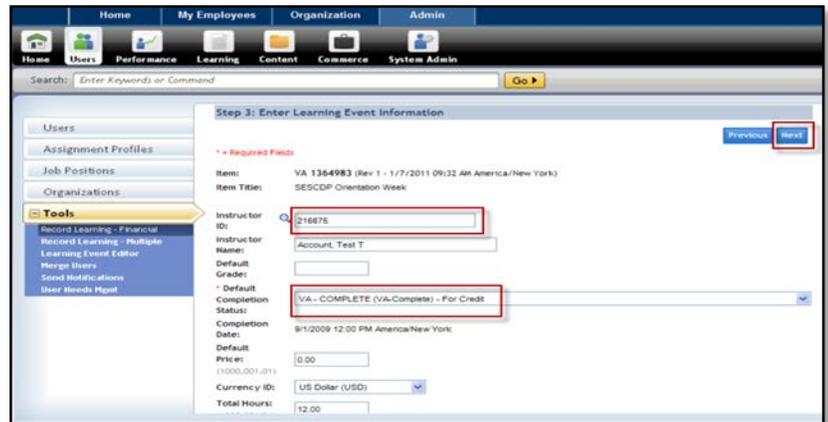
Note: Verify that the **Admin** tab is selected.

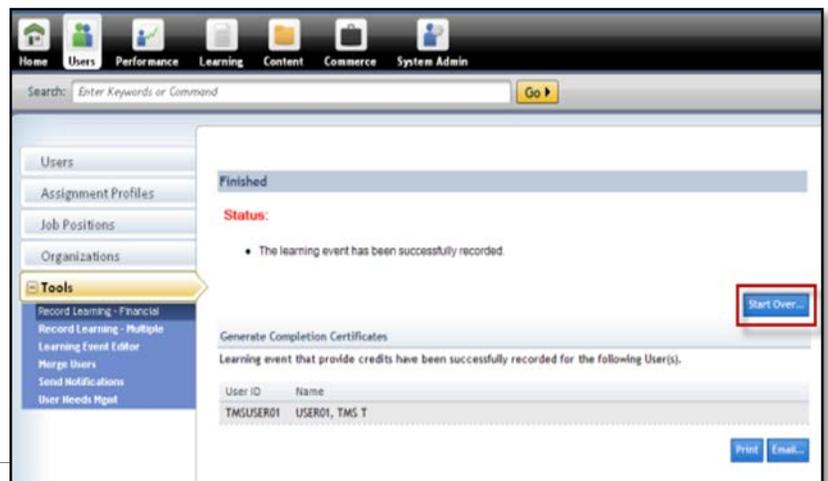
1. Navigate to **Users > Tools > Record Learning – Financial**. *Step 1: Select Event Type* of the Recording Learning – Financial wizard displays.
2. Select the **Scheduled Offering** radio button.
3. Click **Next**. *Step 2: Select Scheduled Offering* of the Recording Learning – Financial wizard displays.
4. Enter the **Scheduled Offering ID** in the textbox exactly or click the **Search** icon to search for and select a scheduled offering ID.
5. Click **Next**. *Step 3: Enter Learning Event Information* of the Recording Learning – Financial



wizard displays.

6. Fill in all of the required data fields. Additional information such as total hours, or credit hours, can be entered as well.
7. Click **Next**. *Step 4: Select Users of the Recording Learning – Financial wizard displays.*
8. Review the list of selected users (all users already registered into the offering). Remove/add users from this list.
9. To remove a user, click the **Remove** checkbox.
10. Click **Apply Changes**.
11. Complete Steps 10-21 in Task A above.
12. Click **Finish**. A pop-up may appear requesting that the page refresh before you proceed.
13. Click **OK**. The application provides a status that the learning event has been recorded successfully.
14. Click **Print** to print a completion certificate report for each user listed.





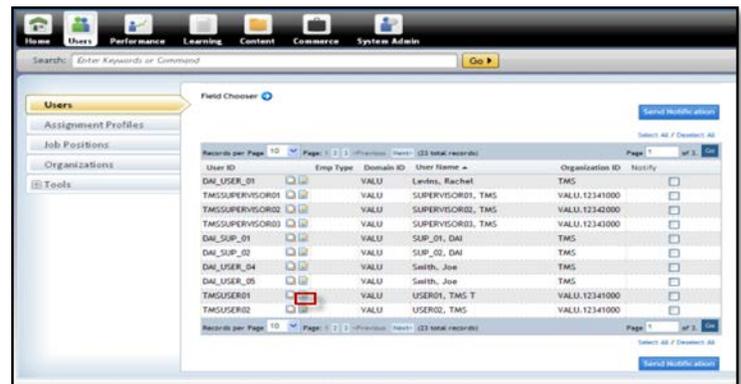
15. Click **Email** to email a completion certificate report to each user listed.
16. Click **Start Over...** to begin the Record Learning – Financial process again. This retains all users previously selected.

Task D. View User Learning History tab

Talent Profile: Accessing

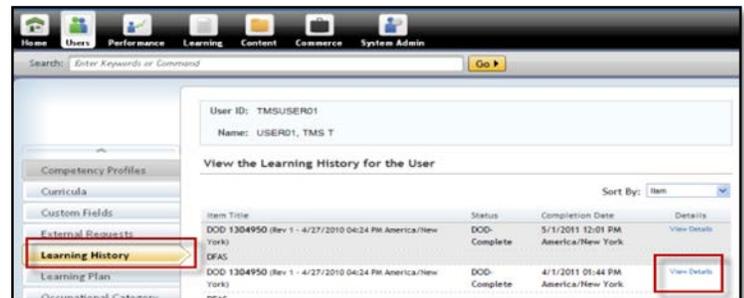
Note: Verify that the **Admin** tab is selected.

1. Navigate to **Users > Users**.
2. Enter search criteria to find one of the users for whom you just recorded a completion.
3. Click **Search**.
4. Click the **Edit** icon to select the user record.



5. Click the **Learning History** tab.
6. Click the **View Details** link for additional information on the learning event. A separate pop-up window appears.

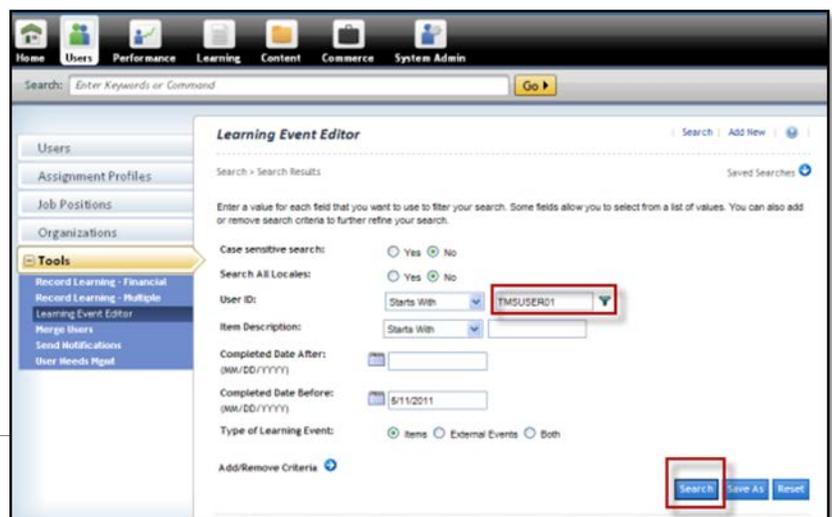
Note: Any additional attached documents can be viewed here.



Task E. Edit Learning Event Using Learning Event Editor

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

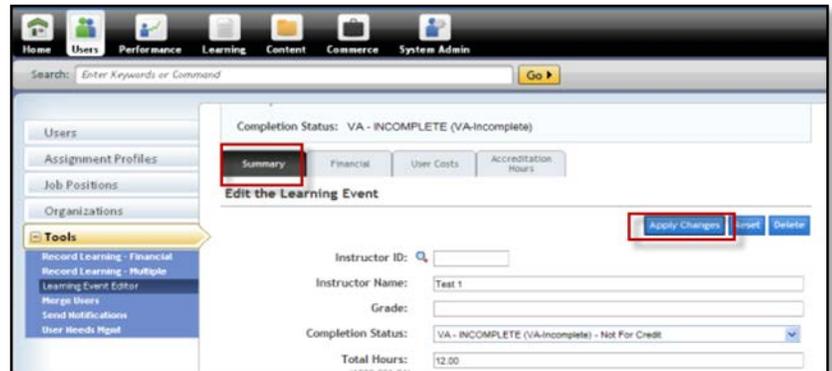
1. Navigate to **Users > Tools > Learning Event Editor**.
2. Enter search criteria to find the learning event (for example, search by user ID or between dates).
3. Click **Search**.



4. Click the **Edit** icon to select the learning event record. Review the learning event details.

5. On the **Summary** tab, details such as the instructor, grade, completion status, completion date, and time can be edited.

6. Click **Apply Changes** to save any edits made to the learning event record.



7. Click **Continue** to return to the **Summary** tab.

