Deltek

Deltek Talent Management 16.3

Learning Administrator Guide

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Contents

Learning Administrator Overview

Employees use the Deltek Talent Learning module to perform all tasks related to courses, classes, and certifications.

The Learning Administrator is responsible for configuring this module to suit your organization's requirements.

> **Note:** This guide covers all available modules and features, even those that your firm may not have purchased.

Definition of Terms

Certain terms are used throughout the Deltek Talent Learning module.

Term	Definition
Curriculum	A curriculum is a set of courses with a common theme or learning objective. For example, the New Managers curriculum may include three courses: Coaching Employees, HR Policies and Procedures, and Scheduling Personnel.
Course	A course is a learning program designed to provide students with a specific set of skills and competencies. It may meet once or multiple times, or may be a self-paced online activity that students do on their own.
Class	A class is a single instance of a course. For example, the New Managers course may be offered four times a year, once per quarter, with classes called New Managers Q1, New Managers Q2, and so on. The same course content is covered in each class.
Waiting List	If you want to attend a class, but the class is currently full, you can enter your name on a waiting list in case an opening occurs. For example, you may want to take the New Managers Q1 class, which is currently full. You are on the waiting list in case an opening occurs.
Watch List	If you want to take a course, but the course is not currently offered, you can enter your name on a watch list in case a class is scheduled. For example, you may want to take the Safety Culture course the next time that it is offered. You are on the watch list in case a new class is offered.

Learning Administration Menu Choices

Click ⚙ in the toolbar in the toolbar to display the Administration menu.

From the **Learning** section of the Administration menu, you can select any learning administration feature.

Courses & Classes

Menu Choice	Description
Classes	This screen lists and lets you manage all of the classes that have been created for your organization. For example, you can change the instructor, schedule, or passing grade for a class.
Class Evaluations	This screen lists all class evaluations that have been created and lets you modify the evaluation questions and review evaluation results.
Courses	This screen lists and lets you manage all of the courses that have been created for your organization. For example, you can edit the information about an existing course or add a new class for a course.
Test Templates	This screen lets you create templates for the tests that instructors administer to students. Instead of creating a new test from scratch, an instructor can base a new test on a template.
Tuition Assistance	This screen lets you set up tuition assistance rules and to review and respond to requests for tuition assistance.

Curricula

Menu Choice	Description
Manage Curricula	This screen lists and lets you manage all of the curricula that have been created for your organization. For example, you can create a new curriculum or add a course to an existing curriculum.

Certifications

Menu Choice	Description
Certifications	This screen lets you create certificates and grant them to students. You can award a certificate to students who complete a single course or all of the courses in a curriculum.

Logistics

Menu Choice	Description
Buildings	This screen lists all of the buildings where classes are held as well as the number of rooms and pieces of equipment in each building. You can add a building or edit the information about an existing building.
Equipment	This screen lists each piece of training equipment that your organization owns, such as white boards and projectors, and where each piece is located. You can add equipment or edit the information about existing equipment.
Rooms	This screen lists each of the rooms where classes are held, including the capacity of each room, the building where the room is located, and the

	equipment in the room. You can add a room or edit the information about an existing room.

Library

Menu Choice	Description
Library Resources	This screen lists all of the books, DVDs, and other learning resources available to your employees as well how many copies exist and who has copies checked out. You can add new items, edit the information about existing items, monitor requests from employees, and check items in and out.

Courses & Classes

Use this Learning Configuration menu to manage courses and classes for your organization.

The following options are available from the Learning Courses & Classes menu:

- Classes
- Class Evaluations
- Courses
- Test Templates
- Tuition Assistance
- E-Learning Setup Wizard
- EPIQ Jobs

Classes Screen

The Classes Screen lists and lets you manage all of the classes that have been created for your organization.

For example, you can change the instructor, schedule, or passing grade for a class.

Display the Classes Screen

Follow these steps to display the Classes screen.

To display the Classes screen:

1. Click ⚙ in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Classes.**

Filter the Contents of the Classes Screen

Follow these steps to filter the contents of the Classes screen by criteria you specify.

To search for classes based on specific criteria:

1. Click **Filter** at the top of the screen.
2. Supply on or more search values:
   - **Class Name:** Enter all or part of the class name.
   - **Class Open Date from:** This is the first day of the class.
   - **Class Open Date to:** This is the last day of the class.
   - **Instructor:** Click the Select Instructor button and select one or more techer for the class.
   - **Class Status:** Select a value to narrow search by class status:
     - **Closed**: Students can search for and find the class, but it is not open to enrollment.
     - **Draft:** The class is under development and not yet enrolling students.
     - **Enrolling:** Students can search for and enroll in the class.
     - **Inactive:** Students can search for and find the class, but it is not open to enrollment.
     - **In Progress:** The class is in session and students can search for and find the class, but cannot enroll if the add/drop date for the class has passed.
3. Click **Filter**.

Contents of the Classes Screen

The Classes screen displays the following columns and actions.

Columns

Column	Description
Name	This is the name of the class. Click the name to see the Class Profile, which provides details about the class, including when and where it is held, how many students can enroll, and which students are currently enrolled.
Instructors	These are the names of the people teaching the class. The word **Assign** displays if no instructor is assigned to teach the class. Click the names or the word **Assign** to open the Manage Class Instructors screen, where you can add or change the instructors assigned to teach the class.
Status	This is the current status of the class.

	▪ **Enrolling**: Students can search for and enroll in the class. ▪ **In Progress**: The class is in session and students can search for and find the class, but cannot enroll if the add/drop date for the class has passed. ▪ **Closed**: Students can search for and find the class, but it is not open to enrollment. ▪ **Draft**: The class is under development and not yet enrolling students. ▪ **Inactive**: Students can search for and find the class, but it is not open to enrollment.
Start	This is the first day of the class.
End	This is the last day of the class.
Times	This is the day of the week and time of day that the class meets.
Public	When a student searches for a class, the search results only include classes that are designated to be public classes.
Capacity (Remote/On-Site)	The first number is the total number of remote and on-site students who can be accommodated in the class. The numbers in parentheses are the number who can enroll to attend remotely and the number who can enroll to attend in person.
Waiting	This is the number of students who are on the waiting list for the class.
Type	This field shows how the course is offered: ▪ **E-Learning**: The course uses the computer as the key component to the learning environment. It is also referred to as Computer Based Training (CBT). This course type includes AICC and SCORM courses. ▪ **Instructor-Led**: This course is facilitated by an instructor, either in a formal classroom format or an interactive virtual workshop. This course type includes internal, external, and non-CBT online courses. ▪ **Read and Sign:** The course only requires reading a document and electronically signing it.
Actions	Click ⋮ for a list of actions that can be taken for each item in the table.

Actions

The buttons and icons on the Classes screen perform the following functions.

Icon/Button	Action	Description
	View All Courses	Click this button at the top of the screen to see a list of all courses offered.

	**Change Class Status**	Click this icon to change the status of the class (**Closed**, **Draft**, **Enrolling**, **Inactive**, or **In Progress**). Pick a different status from the drop-down list.
	**Edit**	Click this icon to change class information.
	**Class Evaluation**	Click this icon to create an evaluation that you can send out to all students to gather feedback on the class.
	**Scheduling**	Click this icon to change the class date, time, or location.
	**Copy**	Click this icon to create a new class based on an existing class, instead of creating the new class from scratch.
	**Attendance**	Click this icon to display a roster of current students and record attendance for a class session. You can mark a student as **Present**, **Tardy**, **Absent**, or **Excused**.
	**Grade Book**	Click this icon to display, record, or update the exam, assignment, and final grades of each student. Click this icon, and click: ▪ **Finalize Grades** to make the final grades that are recorded for each student permanent, so that they cannot be changed in Deltek Talent Management. ▪ **View Class Profile** to see details about the class, including when and where it is held, how many students can enroll, and which students are currently enrolled.
	**Manage Tests**	Click this icon to display descriptions of the tests for this class, edit information about them, and assign weights to them. Click this icon, and click: ▪ **Create New Test** to create a new test from scratch. ▪ **Copy Test** to create a new test based on an existing text. ▪ **More Options** » **View Classes**, to see the Classes Instructing screen, which lists all of the classes that you are teaching or co-teaching. ▪ **More Options** » **Grade Book** to display the grade book for the class.

	Manage Assignments	Click this icon to display descriptions of the assignments for this class, edit information about them, and assign weights to them. Click this icon, and click: ▪ **View Class Profile** to see details about the class, including when and where it is held, how many students can enroll, and which students are currently enrolled. ▪ **Add Assignment** to give students a new assignment to complete. ▪ **More Options** » **View All Classes**, to see the Classes Instructing screen, which lists all of the classes that you are teaching or co-teaching.
	Finalize Grades	Click this icon to display a roster of current students and make the final grades that are recorded for each student permanent, so that they cannot be changed in Deltek Talent Management.
	Enroll Students	Click this icon to display a list of the students currently enrolled in the class, enroll additional students, or add more students to the class list or to the waiting list.
	View Read and Sign Signatures	This icon displays only for classes of the Read and Sign type. Click this icon to see a list of all of the employees who have signed the document.
	Delete	Click this icon to delete a class. This action is available only if the class is in Draft status.

Add a Class Screen

Use the Add a Class screen to add a new class for any existing course.

You must create the course before you add classes for the course.

Display the Add a Class Screen

Follow these steps to display the Add a Class screen.

To display the Add a Class screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Classes.**
3. Click **View All Courses** to display the Courses screen**.**
4. Click **Create a New Course** if you need to create the course before you can add the class.

> **Attention:** Then follow the steps in the Add Course Screen section.

5. If the course already exists, find it on the Courses screen.
   If you need help finding the course, click **Filter** and enter search criteria.
6. Click **Add a New Class** from the **Actions** drop-down list next to the course.

Contents of the Add a Class Screen

The Add a New Class screen displays the following fields.

Contents

Field	Description
Class	Enter the name of the class. Give the class a name that will be relevant to a student. For example, if you are offering several time options for the same class, make sure that the classes are distinctly named so that students can differentiate between them.
Course Name	The course name displays automatically and cannot be changed.
Credits	This is the number of internal credits that a student will earn by completing the course with a passing grade. This number displays automatically and cannot be changed.
CEUs	This is the number of CEUs (Continuing Education Units) that a student will earn by completing the course with a passing grade. This number displays automatically and cannot be changed. When students receive external certifications, degrees, or titles, they sometimes have to complete CEUs to maintain their professional standing. Before granting CEUs, your organization must verify that the appropriate accrediting associations will accept the CEUs.
Status	Select the status that applies to the class. ▪ **Closed**: Students can search for and find the class, but it is not open to enrollment. ▪ **Draft**: The class is under development and not yet enrolling students. You cannot change a class back to Draft status after it is set to any of the other Status options. ▪ **Enrolling**: Students can search for and enroll in the class. ▪ **Inactive:** Students can search for and find the class, but it is not open to enrollment. ▪ **In Progress**: The class is in session and students can search for and find the class, but cannot enroll if the add/drop date for the class has passed.

Field	Description
	▪ These are the default statuses. To change them, click ⚙, click **Drop-down and Multi-Select Lists** from the **Global Settings** section, and select **Class Status** from the **Select Listing** drop-down list. ▪ Without customization, Deltek Talent Learning will not automatically manage the statuses that you add, but the statuses can be useful for reporting purposes.
Company/Division	To associate a class with a company or division, select a value from the drop-down list. Select **Global** if the class is for all employees, enterprise-wide.
Suppress Roster	Select this option to prevent students from seeing the names of the other students in the class.
Private Class	Select this option if the class is intended for a private audience. When a student searches for a class, the search results only include classes that are designated to be public, not those designated to be private.
Class Type	The class type displays automatically based on the class type of the course. ▪ **E-Learning**: The course uses the computer as the key component to the learning environment. It is also referred to as Computer Based Training (CBT). This course type includes AICC and SCORM courses. ▪ **Instructor-Led**: This course is facilitated by an instructor, either in a formal classroom format or an interactive virtual workshop. This course type includes internal, external, and non-CBT online courses. ▪ **Read & Sign:** The course only requires reading a document and electronically signing it.
Enable Show/No-Show Grading	Select this option and enter **100** in the **Passing Grade** field if the instructor can give a pass/fail grade based on attendance alone.
Passing Grade	Enter a passing grade, expressed as a percentage, for the class. Enter **100** and select **Enable Show/No-Show Grading** if all students who attend the class receive a passing grade.
Overall Assignment Weight/Overall Test Weight	Enter the overall assignment and test weights in these fields (for example, 30% to assignments and 70% to tests). Deltek Talent Learning uses these fields to automatically average student scores. Both percentages added together should equal 100%. After you specify the overall weights of assignments and tests, the instructor can determine the weight of each individual assignment or test

Field	Description
	(for example, two tests make up the 70% test weight: a midterm weighted at 40% and a final test weighted at 60%).
Minimum Students	Enter the minimum number of students required to hold the class. If the minimum number is not reached by the add/drop date, the class owner (the person who created the class) receives an email notification to cancel the class or modify the minimum number of students. Deltek Talent Learning does not automatically cancel the class if the minimum number is not reached.
Remote Capacity	Enter the total number of students who can attend the class remotely (for example, via phone or web meeting).
On-site Capacity	Enter the total number of students who can attend the class in person. This number determines the size of the rooms that are suggested for scheduling purposes.
Total Maximum Capacity	This number displays automatically. It is the sum of **Remote Capacity** plus On**-site Capacity**. This number determines when a waiting list is created.
Notify administrators when waiting list reaches	When the waiting list reaches the number of students entered in this field, the Learning Administrator receives a notification.
Class Cost	Enter the cost that your organization pays to offer the class. This can be the price of an external class or the cost of offering a class internally.
Student Fee	Enter the fee that the student pays to take the class.
Start Date/End Date/Add-Drop Date	Select starting, ending, and add/drop dates for this class. Select the **Allow students to drop at anytime** option if students can drop the class at any time.
Create Session	This option is checked by default. To create a class without any sessions (for example, for an online class), deselect the option.
Class Times	Enter the days of the week and times of day that the class will meet.

Add a New Class

Folow these steps to add a new class.

To add a new class:

1. Click  in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Classes.**

3. Click **View All Courses** to display the Courses screen**.**
4. Click **Create a New Course** if you need to create the course before you can add the class.

   Then follow the steps in the “Add a New Course” section.
5. If the course already exists, find it on the Courses screen.

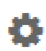
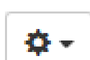
   If you need help finding the course, click **Filter** and enter search criteria.
6. Click **Add a New Class** from the Actions drop-down list next to the course.
7. Enter information about the class.

   The information that displays automatically comes from the course record.
8. Click **Schedule Class**.

Delete a Class

You can delete a class, but only if the **Status** is set to **Draft**.

To delete a new class:

1. Click  in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Classes.**
3. Locate the class that you want to delete by clicking **Filter**.
4. In the in **Class Name** field, type the name of the class; or
5. In the **Filter Classes by Status** field, select the **Draft** check box.
6. Click the **Filter** button.
7. Click  on the row that you want to delete, and in the drop-down menu, select **Delete**.
8. Click **OK**.

Select an Instructor, Location, and Equipment for a Class

When you add a new class and click **Schedule Class**, the Sessions screen displays.

Use it to select the instructor, room, and equipment for the class.
To select an instructor, room, and equipment for a class:

1. Click **Select Instructor** to display a search screen.
2. Complete one of these steps:
   - Enter all or part of an instructor’s name in the **Search** field, and click **Search** to display all matches.
   - Select a manager from the **Manager** drop-down list, and click **Search** to see all of the people who report to that manager.

3. Click the next to the name of the person who will teach the class.
4. Complete one of these steps:
   - Select **Enter your own location** and enter your own description of the location.
   - Select **Room Reservation** and choose from a list of rooms that will accommodate the maximum number of on-site students that you have specified for the class.
5. If you use the **Room Reservation** option, you can click **View Selected Room Equipment** to see what equipment is available in the room.

   By default, all of the pieces of equipment are selected.
6. Clear the check box for any equipment that you do not need.
7. Click **Reserve Additional Equipment** if you need any equipment that is not in the room.
8. Enter a keyword, such as laptop or projector, in the **Search** field, and click **Search** to display a list of matches.
9. Click next to an item to request it.
10. Click **Confirm Selection**.
11. Click **Save** on the Sessions screen.

Review Class Information

When you save information about a new class, a summary screen displays, showing the schedule, location, and equipment associated each class session.

Use this screen to further refine your plans on a session by session basis.

The buttons and icons on the screen perform the following functions.

Icon	Action	Description
	Edit Class	Click this button to change basic information about the class, such as its name, capacity, or grading information.
	Add Instructor	Click this button to change the instructor for the class or add an additional instructor.
	More Options » **View All Classes**	Use this option to see a list of all of your organization's classes.
	More Options » **View All Courses**	Use this option to see a list of all of your organization's courses.
	Save Location	Select **Enter your own location** or **Room Reservation,** specify a location, and click this button to change the location of all future class sessions. If you want to change the location of individual sessions, use the **Edit Session** option.

		If you change the location of a session, all of the equipment reservations will be lost, but the equipment in the new location will be reserved.
	Edit Session	Click this icon next to a session to change the schedule, location, or equipment for the session. If you change the location of a session, all of the equipment reservations will be lost, but the equipment in the new location will be reserved.
	Delete Session	Click this icon next to a session to delete it.

Class Enrollment Screen

Use the Class Enrollment screen to enroll students in a class.

Display the Class Enrollment Screen

Follow these steps to display the Class Enrollment Screen.

To display the Class Enrollment screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Classes.**
3. Click **Filter** to search for the class in which you want to enroll students.
4. Click the **Enroll Students** icon from the **Actions** drop-down list next to the class.

Contents of the Class Enrollment Screen

The Class Enrollment screen displays the following fields.

Fields

Field	Description
Instructors	These are the people who are teaching the class. Click an instructor's name to display the instructor's Total Talent Profile, including contact information.
Status	This is the status that applies to the class. ▪ **Enrolling**: Students can search for and enroll in the class. ▪ **In Progress**: The class is in session and students can search for and find the class, but cannot enroll if the add/drop date for the class has passed. ▪ **Closed**: Students can search for and find the class, but it is not open to enrollment.

Field	Description
	▪ **Draft**: The class is under development and not yet enrolling students. ▪ **Inactive:** Students can search for and find the class, but it is not open to enrollment.
Public Class	This field indicates whether or not the class is considered to be a public class. When a student searches for a class, the search results only include public classes.
Dates	This is the range of dates during which classes will be held.
Time	This is the day of the week and time of day on which classes are held.
Location	This is the site where the class is being held (**N/A** if the class is online). Click a location to see the Class Location Profile, including the location's address, links to map applications such as Google Maps, and a list of classes scheduled to be held at the location.
Student Fee	This is the fee that the student must pay to take the class.
Remote Capacity	This is the total number of students who can access the class remotely (for example, via phone or web meeting).
On-site Capacity	This is the total number of students who can attend the class in person. This number determines the rooms that will be listed for scheduling purposes.
Total Maximum Capacity	This number displays automatically. It is the sum of Remote Capacity plus On-site Capacity. This number determines when a waiting list is created.
Override Prerequisites	Select this option if you want to enroll students regardless of whether they have completed the prerequisites for taking this class.

Enroll Students in a Class

Follow these steps to enroll students in a class.

To enroll students in a class:

1. Click ⚙ in the toolbar to display the Administration menu.
2. In the Learning section, click **Classes.**
3. Enter search criteria, and click **Filter** to search for the class in which you want to enroll students.
4. Click **Enroll Students** from the **Actions** drop-down list next to the class.

5. Click **Select Students** to display a pop-up window where you can search for and select students.

   You can search for students based on many different criteria, including job role, manager name, and location.

   a) Select criteria, and click **Search**.

   b) Select the check box next to each student that you want to enroll, or click the check box in the header to select all students.

6. Click **Add All Selected**, and click **Confirm Selection**.
7. For each student, specify whether the student wants to attend the class onsite or remotely, or doesn't have a preference.
8. Select **Override Prerequisites** if you want to enroll students regardless of whether they have completed the prerequisites for taking this class.
9. Click **Enroll**. Enrolled students are listed in the Class Roster section.
   If there are no openings left in the class, students are automatically placed on the waiting list and are listed in the **Add to Waiting List** section.
10. If instructor approval is required for a student to be enrolled, the instructor receives an email alert. The student's enrollment is not confirmed until the instructor approves it.

    However, as an administrator, you can also approve enrollments.

    Still on the **Actions** column of the Class Roster section, click **Approve** to approve enrollments.

Class Evaluations Screen

You can create an evaluation that will go to each student who attends a class.

Once the class closes, an email is sent to all students asking them to complete the evaluation. You can also identify a default evaluation, which is used for any class that does not have an evaluation of its own.

Possible question types are:

Type	Description
True/False	The question asks the student to select a **True** or **False** response**.** (You can re-label **True** or **False** to be **Yes** or **No**.)
Multiple Choice, Single Answer	The question includes a list of choices from which the student can select one answer.
Multiple Choice, Multiple Answer	The question includes a list of choices from which the student can select multiple answers.
Essay	The student enters a response in paragraph form.
Keyword	This option lets you enter specific words that a student can choose as a response.

Display the Class Evaluations Screen

Follow these steps to display the class evaluations screen.

To review and manage evaluations:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Class Evaluations** to see a list of all evaluations that have been created.
3. Use the columns and icons to review and update the evaluations.

Contents of the Class Evaluations Screen

The screen displays the following columns and actions.

Columns

Column	Description
Evaluation Name	This is the name of the evaluation. Click it to see the start and end dates of the evaluation, the students to whom it will be sent, and the evaluation questions.
Class Name	This is the name of the class that is being evaluated. Click it to see the Class Profile, which provides details about the class, including when and where it is held, how many students can enroll, and which students are currently enrolled.
Actions	This column displays the actions that can be taken for each item in the table.

Actions

The icons on the Class Evaluations screen perform the following functions.

Icon	Action	Description
	Make Default	Click this icon to identify the evaluation as the default evaluation for your organization. If a class does not have an evaluation of its own, the default is sent to all students in the class.
	Edit	Click this icon to change any part of the evaluation, including the start and end date, instructions, and questions.
	Delete	Click this icon to delete the evaluation.

Create an Evaluation

Follow these steps to create an evaluation.

To create an evaluation:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Classes.**
3. Enter search criteria, and click **Filter** to search for the class for which you want to create an evaluation.
4. Click the **Class Evaluation** icon from the **Actions** drop-down list next to the class.
5. Click **Create Evaluation**.
6. Enter general information about the evaluation, using the following fields:
   - **Evaluation Name**: Enter a name for the evaluation. The default name is <course name> Evaluation (for example, Advanced Safety Evaluation).
   - **Total Time (in minutes):** Enter the number of minutes that a student has to complete the evaluation.
   - **Start Date:** Enter the date when the evaluation should be made available to students.
   - **End Date:** Enter the date when the evaluation should be made unavailable to students.
   - **Start Message:** Enter a message that students will see when they launch the evaluation.
   - **Final Message:** Enter a message that students will see when they finish the test.
   - **Evaluation Instructions:** Enter any additional instructions that students might need to complete the evaluation. This text displays on the first page of the evaluation, below the **Questions per Page** field.
7. Click **Save & Continue** to begin creating questions.
8. For each question, select a format (**True/False**, **Essay**, and so on) from the **Question Type** drop-down list.
9. Select the **Number of Answers** you will provide for students to select from. (This field is not displayed for **True/False** and **Essay** questions.) For example, enter **3** if the student can select from three answers: Quickly, Accurately, and Thoroughly.
10. Click **Add Question.**
11. Enter the question and possible answers, using the following fields:
    - **Test Question**: Enter the question that students will see.
    - **Special instructions for this question**: Enter any information that the student needs to understand the question.
    - **Label/Keyword**: Enter the possible responses that students can select.

- **Correct Answer:** Identify the correct responses to the question.
- **Answer Value**: Enter the value of this question, based on a 100 point scale. For example, if you have four questions of equal value, give each a value of 25. This field is optional.

12. Click **Save Question**.
13. Repeat this process until you finish entering all of the questions in the evaluation. The bottom of the page displays all of the questions that you entered.
14. Click **Complete Evaluation**.

Review and Manage Evaluations

You can review all evaluations that have been created and make changes to them or delete them.

You can also identify a default evaluation, which is used for any class that does not have an evaluation of its own.

Courses Screen

Use the Courses screen to see a list of all of the courses that have been created to date.

You can also use the Courses screen to add a new course, make changes to an existing course, or upload online learning packages.

Display the Courses Screen

Follow these steps to display the Courses screen.

To display the Courses screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Courses**.
3. Click **Filter** to enter search criteria to narrow the list of courses based on the **Course Name** or **Learning Manager.**

Contents of the Courses Screen

The Courses screen displays the following columns and actions.

Columns

Column	Description
Course	This is the name of the course. Click the name to display the Course Profile, which is a summary of information about a course, including the course description, competencies and skills gained, and classes available.

Column	Description
Learning Manager	This is the person who created the course. This person can perform the same administrative actions as the Learning Administrator, but only for the courses that he or she created.
Credits	This is the number of internal credits that a student will earn if the student completes the course with a passing grade.
Course Types	This column displays how the course is offered: ▪ **E-Learning**: The course uses the computer as the key component to the learning environment. It is also referred to as Computer Based Training (CBT). This course type includes AICC and SCORM courses. ▪ **Instructor-Led**: This course is facilitated by an instructor, either in a formal classroom format or an interactive virtual workshop. This course type includes internal, external, and non-CBT online courses. ▪ **Read and Sign**: The course only requires reading a document and electronically signing it.
Course May Be Retaken	This column displays if students can take the course again after they have already taken it one or more times.
SCORM Name	SCORM and AICC are standards for preparing online learning for use in a learning management system. Deltek Talent Learning supports these standards. You can upload SCORM and AICC formatted learning packages to Deltek Talent Learning. The SCORM name displayed here is the name of the SCORM file that was uploaded.
File Size	This is the size of the SCORM file that was uploaded.
Classes	This is the number of classes, of any status, that have been created for this course. Click the number to see the list of classes and information about each one.

Column	Description
Status	This column displays the current status of the course: ▪ **Draft**: The course is under development. Classes cannot be created for it and it cannot be added to any curriculum. ▪ **Archived**: The course is no longer offered. Students will not see it when they search for courses. ▪ **Inactive**: Administrators can enroll students in the classes for this course, but students will not see the course when they search for courses. ▪ **Open**: This course is active. Classes can be created for it and students can find it when they search for courses.
Watch List	This is the number of students who are interested in taking the course when a new class is offered. These students receive a notification when a class is added.
Actions	Click ⋮ for a list of actions that can be taken for each item in the table.

Actions

The buttons and icons on the Courses screen perform the following functions.

Icon	Action	Description
	Create a New Course	Click this button to display the Add Course screen and set up a new course.
	E-Learning FTP Settings	This button displays only if the Learning module is not configured to accept and launch e-learning content. Click this button to populate the settings and to facilitate FTP import.
	More Options » Edit Course Certification Template	Use this option to create or change the certificate that students earn when they complete the course.
	**Mark as New Hire Orientation Course**	Select this option if the course is part of your organization's new hire orientation program.

	Edit	Click this icon to edit information about the course, including the course description, credits and CEUs earned, and skills and competencies gained.
	Show Classes for this Course	Click this icon to see a list of all of the classes, of any status, created for this course and information about each one.
	Add a New Class	Click this icon to create a new class for this course. This option is not available for **Online** and **Read and Sign** type courses, which do not require class attendance.
	Manage Test Templates	Click this icon to view and edit the test templates that have been created for this course. Instructors can create their own tests for a class or they can select from test templates that are already created for the course.
	View Signatures	This option is only relevant for **Read and Sign** type courses, which require a student to read a document and provide an electronic signature attesting that they read it. Click this icon to see a list of all of the students who have provided an electronic signature.
	Find Employees Not Enrolled	Click this icon to see a list of all employees who are not enrolled in the course, along with their email address, manager name, and other information. Click an employee name to see the employee's Total Talent Profile.
	Delete this Course	Click this icon to delete the course. You cannot delete classes that are not in Draft status.
	Unable to Delete	This icon displays if there are active classes associated with the course.

Add Course Screen

Use the Add Course screen to set up a new course in Deltek Talent Learning. You must create a course before you add classes for the course.

Display the Add Courses Screen

Follow these steps to display the Add Courses Screen.

To display the Add Course screen:

1. Click in the toolbar to display the Administration menu.

2. In the **Learning** section, click **Courses**.
3. Click **Create a New Course**.
4. Select the **Course Type** to specify how the class will be offered by clicking one of the following buttons:
   - **Instructor-Led**: This class is facilitated by an instructor, either in a formal classroom format or an interactive virtual workshop. This course type includes internal, external, and non-CBT online courses.
   - **E-Learning**: Select this if the class uses the computer as the key component to the learning environment. Such courses are also referred to as Computer Based Training (CBT). This course type includes AICC and SCORM courses.
   - **Read and Sign**: This class requires the student to read a document and electronically sign it.

     Each course type launches a distinct form, with certain conditional fields appearing only for specific course types.

Add an Instructor-Led Course

Follow these steps to add an instructor-led course.

To add a new Instructor-led course:

1. On the Create a New Course dialog, click **Instructor-Led**.
2. Complete the following fields on each of the following tabs:
   - Details
   - Attachments
   - Additional Details
   - Associations
   - Approvals
   - Skills Gained
   - Competencies Gained
   - Prerequisite and Equivalent courses
   - Equipment
   - Topics Covered
3. Click **Save** when finished.

Tabs of the Add Course Screen for Instructor-Led Course

Details Tab of the Add Course Screen

The Details tab of the Add Course screen for an Instructor-Led course contains the following fields.

Contents

Field	Description
Course Name	Enter the name of the course.
Learning Manager	Click **Select a Learning Manager** to search for and select the name of the person who created the course. This person can perform the same administrative actions as the Learning Administrator, but only for the courses that he or she created.
Instructors	For Instructor-Led courses, this field displays only when you are editing a course with associated classes, and only if the class has an instructor. Click **Select Instructor** to search for and select the names of the individuals who will teach the course. The instructors you select are added to all the classes associated with this course.
Course Type	This field indicates that the **Course Type** is **Instructor-Led**.
Course Source	Select from the following: ▪ **Internal**: The course is offered by your organization and taught by your organization's instructors. ▪ **External**: The course is offered by an outside institution, such as a college, and is not managed by your organization. However, the student's grades and credits are added to the student's Total Talent Profile.
URL / Physical Address	Enter the URL or the address of the institution that offers the course.
Educational Unit	Select from the following unit types. ▪ **CEUs**: The course awards Continuing Education Units. ▪ **CPD**: The course awards Continuing Professional Development units. ▪ **Credits**: The course awards Continuing Education Credits. ▪ **PDH**: The course awards Professional Development Hours.
Educational Unit Category	Select one of the following: **Compliance**, **General**, **Professional**, or **Strategic**.
Educational Unit Value	Enter the number of units that a student will earn by completing the course with a passing grade.

Field	Description
	When students receive external certifications, degrees, or titles, they sometimes have to complete additional continuing education courses to maintain their professional standing. Before granting educational units, your organization must verify that the appropriate accrediting associations will accept them.
Add Education Units	Click **Add Education Units** to add rows to the Educational Unit table. This allows you to configure and grant different units to different user groups or grant multiple unit types to specific user groups.
Status	Select the course status from the list: ▪ **Draft:** The course is under development. Classes cannot be created for it and it cannot be added to any learning path. ▪ **Open**: This course is active. Classes can be created for it and students can find it when they search for courses. ▪ **Inactive**: Administrators can enroll students in the classes for this course, but students will not see the course when they search for courses. ▪ **Archived**: The course is no longer offered. Students will not see it when they search for courses.

Attachments Tab of the Add Course Screen

The Attachments tab of the Add Course screen contains the following fields.

Contents

Field	Description
URL	Enter the URL that offers the course.
Add a URL	Click this to add another URL to the course.
Files	Click Browse to choose and upload a file from your computer.
Add a File	Click this to add another file attachment to the course.

Additional Details Tab of the Add Course Screen

The Additional Details tab of the Add Course screen contains the following fields.

Contents

Field	Description
Course May Be Retaken	Select **No** if students cannot take the course again after they have already taken it.
New Hire Orientation Course	Select this option if this course is part of your company's new hire orientation.
Course Recurring	Select **Yes** if this is a recurring course.
Course Recurring Interval	If this is a recurring course, specify the interval at which the course is repeated, in weeks.

Associations Tab of the Add Course Screen

The Associations tab of the Add Course screen contains the following fields.

Contents

Field	Description
Company/ Division	If you want to associate the instructor-led course to a specific organizational unit, such as a company or division, select from the multi-select list.
Job Family	If you want to associate the instructor-led course to a specific job family or families, such as Administrative or Sales, select from the multi-select list.
Job Role	If you want to associate the instructor-led course to a specific job role or roles (for example, Manager or Vice President), select from the multi-select list.
Job Title	If you want to associate the instructor-led course to specific job title or titles (for example, Contracts Manager or Receptionist), select from the multi-select list.

Approvals Tab of the Add Course Screen

The Approvals tab of the Add Course screen contains the following fields.

Contents

Field	Description
Approval Types	If approvals for courses are desired, then select the type of approval from the list.

Skills Gained Tab of the Add Course Screen

The Skills Gained Tab of the Add Courses screen contains the following fields.

Contents

Field	Description
Available Items/ Selected Items	Select any number of skills that students will gain by taking the course. Students will be able to see and search on these skills when looking for courses to take. First select a category, then select the individual skills for the category. ▪ To select or clear individual skills, click the category to expand a list of each skill, then click the plus sign next to each skill you want to add to the Selected Items list. ▪ To select a skill level, click the arrow in the **Level** drop-down list and select **Beginner**, **Intermediate**, **Advanced**, or **Expert**. ▪ To remove a skill from the Selected Items list, click the red x next to that skill.

Competencies Gained Tab of the Add Course Screen

The Competencies Gained Tab of the Add Courses screen contains the following fields.

Contents

Field	Description
Available Items/ Selected Items	Select any number of competencies that students will gain by taking the course. Students will be able to see and search on these competencies when looking for courses to take. First select a category, then select the individual competencies for the category. ▪ To select or clear individual competencies, click the category to expand a list of each competency, then click the plus sign next to each competency you want to add to the Selected Items list. ▪ To rate the competency, click the arrow in the **Rating** field and select **1 — Seldom Meets Expectations, 2 — Meets Most Expectations, 3 — Meets All Expectations, 4 — Exceeds Expectations, 5 — Greatly Exceeds Expectations** ▪ To remove a competency from the Selected Items list, click the red x next to that competency. **Note:** Administrators are not required to select a skill level or competency rating for every item selected in the **Skills Gained** and **Competencies Gained** tabs. However, only items with a specified rating are added to users' competency profiles when the course is completed.

Field	Description
	In addition, because Competencies and Skills can be used as course search criteria, the Skills and Competencies Gained feature allows students who want to enhance their competency profiles to find courses relevant to their profile objectives via the Course Search function.

Prerequisite and Equivalent Courses Tab of the Add Course Screen

The Prerequisite and Equivalent Courses tab contains the following fields.

Contents

Field	Description
Prerequisite Courses	Click **Select Prerequisites** to specify any courses that a student must complete before enrolling in this course. To find a course, enter a full or partial course name, and click **Search**.
Equivalent Courses	Click **Select Equivalent Courses** to specify any courses that might be equivalent to this course. To find a course, enter a full or partial course name, and click **Search**.

Equipment Tab of the Add Course Screen

The Equipment tab of the Add Courses screen contains the following fields.

Contents

Field	Description
Equipment Types/ Equipment	Select the equipment needed by the instructor. First select a category from the **Equipment Types** field, then select the individual pieces of equipment for the category. ▪ To select or clear individual items, click an item and use the single right arrow to move the item to the selected list, or click an item in the selected list and click the left arrow to remove it. ▪ To select or clear all of the items in a category, click any item and use the double left or double right arrows to move it to or from the selected list.

Topics Covered Tab of the Add Course Screen

The Topics Covered tab of the Add Courses screen contains the following fields.

Contents

Field	Description
Topics Covered	Select one or more topics for the course (for example, Leadership, Safety, Cultural Sensitivity) from the list of topics that are set up for your organization. To add new topics, click , click **Drop-down and Multi-Select Lists** from the **Global Settings** section, and select **Topics Covered** from the **Select Listing** drop-down list.

Add an E-Learning Course

Follow these steps to add an E-Learning course.

Warning: For new clients or existing clients who have never used e-learning content before, please note that the Learning module must first be configured so that it can accept and launch e-learning content.

If on the Create a New Course window, you see the E-Learning FTP Settings button instead, of the E-Learning button, please proceed to the E-Learning Settings section of this document. Also, if you encounter the E-Learning Setup Wizard after you click the E-Learning button, please proceed to the E-Learning Settings section of this document.

Only after you have completed the steps in the E-Learning Settings section should you continue with the procedure listed below.

To add a new E-Learning course:

1. On the Create a New Course window, click **E-Learning**.
2. Complete the following fields on the following tabs:
   - E-Learning Package Import
   - Details
   - Additional Details
   - Associations
   - Approvals
   - Skills Gained
   - Competencies Gained
   - Prerequisite and Equivalent courses
   - Equipment
   - Topics Covered
3. Click **Save** when finished.

Tabs of the Add Course Screen for E-Learning Course

Learning Package Import Tab of the Add Course Screen

The Package Import Tab of the Add Course screen for an e-learning course contains the following fields.

Contents

Field	Description
Package Location	Select from the following options: ▪ **PC:** Select this to choose a file from the hard drive of your computer. ▪ **FTP:** Select this to choose a file from your FTP server.
Upload Package	This field displays if you selected **PC** in the **Package Location** field. Click **Browse** to find and select the e-learning package to upload from your computer hard drive. The maximum file size limit is 250MB.
Upload FTP Package	This field displays if you selected **FTP** in the **Package Location** field. Click **FTP File Upload Package** and select the e-learning package from your FTP file directory. **Note:** Make sure that your company's FTP settings are properly configured on the E-Learning Settings screen (**Administration** » **Learning** » **Courses & Classes** » **E-Learning Setup Wizard**).
Overwrite Existing Content	Select this check box if you are updating existing content.
Contains Multiple Courses	Select this check box to indicate whether the package contains multiple courses.
E-Learning Standard	Select from the following e-learning standards: ▪ **SCORM**: Select this if you are uploading a Sharable Content Object Reference Model (SCORM) package. ▪ **AICC**: Select this if you are uploading an Aviation Industry Computer-Based Training Committee (AICC) package.
Hold Child Jobs In Queue	This field displays only if the **Contains Multiple Courses** field is selected. Select this check box to instruct the Learning module not to process any child Jobs created from a multi-course package. This places the package in **On Hold** status until it is manually set to **Ready** status on the E-Learning

Field	Description
	Management screen (**Administration** » **Learning** » **Courses & Classes** » **EPIQ Jobs**).

Details Tab of the Add Course Screen

The Details Tab of the Add Course screen for an e-learning course contains the following fields.

Contents

Field	Description
Course Name	Enter the name of the course. However, if you selected the **Contains Multiple Courses** check box, then this field displays a non-editable value, **Course name will be from package**.
EPIQ Overwrite Course Name	Select this check box to use the course name of the package after processing. This field displays a non-editable value, **Yes**, if you selected the **Contains Multiple Courses** check box,
Learning Manager	Click **Select a Learning Manager** to search for and select the name of the person who created the course. This person can perform the same administrative actions as the Learning Administrator, but only for the courses that he or she created.
Instructors	Click **Select Instructor** to search for and select the names of the individuals who will teach the course. The instructors you select are added to all the courses in the E-Learning bundle, as well as to all the classes associated with those courses.
Course Type	This field indicates that the **Course Type** is **E-Learning**.
Start Date	Select the date when this course is scheduled to start.
End Date	Select the date when this course is scheduled to end.
Company/ Division	Select a value from the drop-down list to associate the course with a company or division. Select **Global** if the course is for all employees, enterprise-wide.
Educational Unit	Select from the following unit types. ▪ **CEUs**: The course awards Continuing Education Units. ▪ **CPD**: The course awards Continuing Professional Development units. ▪ **Credits**: The course awards Continuing Education Credits. ▪ **PDH**: The course awards Professional Development Hours.

Field	Description
Educational Unit Category	Select one of the following: **Compliance**, **General**, **Professional**, or **Strategic**.
Educational Unit Value	Enter the number of units that a student will earn by completing the course with a passing grade. When students receive external certifications, degrees, or titles, they sometimes have to complete additional continuing education courses to maintain their professional standing. Before granting educational units, your organization must verify that the appropriate accrediting associations will accept them.
Add Education Units	Click **Add Education Units** to add rows to the Educational Unit table. This allows you to configure and grant different units to different user groups or grant multiple unit types to specific user groups.
Status	Select the course status from the list: ▪ **Draft:** The course is under development. Classes cannot be created for it and it cannot be added to any learning path. ▪ **Open**: This course is active. Classes can be created for it and students can find it when they search for courses. ▪ **Inactive**: Administrators can enroll students in the classes for this course, but students will not see the course when they search for courses. ▪ **Archived**: The course is no longer offered. Students will not see it when they search for courses.

Additional Details Tab of the Add Course Screen

The Additional Details Tab of the Add Course screen for an e-learning course contains the following fields.

Contents

Field	Description
Course Description	Enter a description for the course. Include keywords that will help students find the course when they perform searches.
Course May Be Retaken	Select **No** if students cannot take the course again after they have already taken it.
New Hire Orientation Course	Select this option if this course is part of your company's new hire orientation.
Course Recurring	Select **Yes** if this is a recurring course.

Field	Description
Course Recurring Interval	If this is a recurring course, specify the interval at which the course is repeated, in weeks.
Suppress Roster	Select this option to prevent students from seeing the names of the other students in the class.
Private Class	Select this option if the class is intended for a private audience.
Class Cost	Enter the cost that your organization pays to offer the class.
Student Fee	Enter the fee that the student pays to take the class.
Allow Students to Drop at Any Time	Select this option to allow students to drop the course at any time.

Associations Tab of the Add Course Screen

The Associations tab of the Add Course screen for an e-learning course contains the following fields.

Contents

Field	Description
Company/ Division	If you want to associate the E-Learning course to a specific organizational unit, such as a company or division, select from the multi-select list.
Job Family	If you want to associate the E-Learning course to a specific job family or families, such as Administrative or Sales, select from the multi-select list.
Job Role	If you want to associate the E-Learning course to a specific job role or roles (for example, Manager or Vice President), select from the multi-select list.
Job Title	If you want to associate the E-Learning course to specific job title or titles (for example, Contracts Manager or Receptionist), select from the multi-select list.

Approvals Tab of the Add Course Screen

The Approvals Tab of the Add Course screen for an e-learning course contains the following fields.

Contents

Field	Description
Approval Types	Select one or more roles of the people who must approve a student's enrollment in the course (for example, the employee's manager or the course instructor).

Skills Gained Tab of the Add Course Screen

The Skills Gained Tab of the Add Course screen for an e-learning course contains the following fields.

Contents

Field	Description
Available Items/ Selected Items	Select any number of skills that students will gain by taking the course. Students will be able to see and search on these skills when looking for courses to take. First select a category, then select the individual skills for the category. ▪ To select or clear individual skills, click the category to expand a list of each skill, then click the plus sign next to each skill you want to add to the Selected Items list. ▪ To select a skill level, click the arrow in the **Level** drop-down list and select **Beginner, Intermediate, Advanced, or Expert**. ▪ To remove a skill from the Selected Items list, click the red x next to that skill.

Competencies Gained Tab of the Add Course Screen

The Skills Gained Tab of the Add Course screen for an e-learning course contains the following fields.

Contents

Field	Description
Available Items/ Selected Items	Select any number of competencies that students will gain by taking the course. Students will be able to see and search on these competencies when looking for courses to take. First select a category, then select the individual competencies for the category. ▪ To select or clear individual competencies, click the category to expand a list of each competency, then click the plus sign next to each competency you want to add to the Selected Items list.

Field	Description
	▪ To rate the competency, click the arrow in the **Rating** field and select **1 — Seldom Meets Expectations, 2 — Meets Most Expectations, 3 — Meets All Expectations, 4 — Exceeds Expectations, 5 — Greatly Exceeds Expectations** ▪ To remove a competency from the Selected Items list, click the red x next to that competency. **Note:** Administrators are not required to select a skill level or competency rating for every item selected in the **Skills Gained** and **Competencies Gained** tabs. However, only items with a specified rating are added to users' competency profiles when the course is completed. In addition, because Competencies and Skills can be used as course search criteria, the Skills and Competencies Gained feature allows students who want to enhance their competency profiles to find courses relevant to their profile objectives via the Course Search function.

Prerequisite and Equivalent Courses Tab of the Add Course Screen

The Prerequisite and Equivalent Courses Tab of the Add Course screen for an e-learning course contains the following fields.

Contents

Field	Description
Prerequisite Courses	Click **Select Prerequisites** to specify any courses that a student must complete before enrolling in this course. To find a course, enter a full or partial course name, and click **Search**.
Equivalent Courses	Click **Select Equivalent Courses** to specify any courses that might be equivalent to this course. To find a course, enter a full or partial course name, and click **Search**.

Equipment Tab of the Add Course Screen

The Equipment Tab of the Add Course screen for an e-learning course contains the following fields.

Contents

Field	Description
Equipment Types/ Equipment	Select the equipment needed by the instructor. First select a category from the **Equipment Types** field, then select the individual pieces of equipment for the category.

Field	Description
	▪ To select or clear individual items, click an item and use the single right arrow to move the item to the selected list, or click an item in the selected list and click the left arrow to remove it. ▪ To select or clear all of the items in a category, click any item and use the double left or double right arrows to move it to or from the selected list.

Topics Covered Tab of the Add Course Screen

The Topics Covered Tab of the Add Course screen for an e-learning course contains the following fields.

Contents

Field	Description
Topics Covered	Select one or more topics for the course (for example, Leadership, Safety, Cultural Sensitivity) from the list of topics that are set up for your organization. To add new topics, click , click **Drop-down and Multi-Select Lists** from the **Global Settings** section, and select **Topics Covered** from the **Select Listing** drop-down list.

Add a Read and Sign Course

Follow these steps to add a read and sign course.

To add a Read and Sign course:

1. On the Create a New Course window, click **Read and Sign**.
2. Complete the following fields on the following tabs:
   - Details
   - Read and Sign Documents
   - Additional Details
   - Associations
   - Approvals
   - Skills Gained
   - Competencies Gained
   - Prerequisite and Equivalent courses
   - Equipment
   - Topics Covered
3. Click **Save** when finished.

Tabs of the Add Course Screen for Read and Sign Course

Details Tab of the Add Course Screen

The Details tab of the Add Course screen for a Read and Sign course contains the following fields.

Contents

Field	Description
Course Name	Enter the name of the course.
Learning Manager	Click **Select a Learning Manager** to search for and select the name of the person who created the course. This person can perform the same administrative actions as the Learning Administrator, but only for the courses that he or she created.
Course Type	This field indicates that the **Course Type** is **Read and Sign**.
Read and Sign File Upload	Click **Browse** to choose and upload a file from your computer.
Read and Sign URL	Enter the URL where students can access the Read and Sign course.
Start Date	Select the date when this course is scheduled to start.
End Date	Select the date when this course is scheduled ot end.
Company/Division	Select a value from the drop-down list to associate the course with a company or division. Select **Global** if the course is for all employees, enterprise-wide.
Educational Unit	Select from the following unit types. ▪ **CEUs**: The course awards Continuing Education Units. ▪ **CPD**: The course awards Continuing Professional Development units. ▪ **Credits**: The course awards Continuing Education Credits. ▪ **PDH**: The course awards Professional Development Hours.
Educational Unit Category	Select one of the following: **Compliance**, **General**, **Professional**, or **Strategic**.

Field	Description
Educational Unit Value	Enter the number of units that a student will earn by completing the course with a passing grade. When students receive external certifications, degrees, or titles, they sometimes have to complete additional continuing education courses to maintain their professional standing. Before granting educational units, your organization must verify that the appropriate accrediting associations will accept them.
Add Education Units	Click **Add Education Units** to add rows to the Educational Unit table. This allows you to configure and grant different units to different user groups or grant multiple unit types to specific user groups.
Status	Select the course status from the list: ▪ **Draft:** The course is under development. Classes cannot be created for it and it cannot be added to any curriculum. ▪ **Open**: This course is active. Classes can be created for it and students can find it when they search for courses. ▪ **Inactive**: Administrators can enroll students in the classes for this course, but students will not see the course when they search for courses. ▪ **Archived**: The course is no longer offered. Students will not see it when they search for courses.

Read and Sign Documents Tab of the Add Course Screen

The Read and Sign Documents tab of the Add Course screen for a Read and Sign course contains the following fields.

Contents

Field	Description
Read and Sign URL	Enter the URL where students can access the Read and Sign course.
Add a URL	Click this to add another URL to the course.
Read and Sign File Upload	Click **Browse** to choose and upload a file from your computer.
Add A File	Click this to add another file attachment to the course.

Associations Tab of the Add Course Screen

The Associations tab of the Add Course screen for a Read and Sign course contains the following fields.

Contents

Field	Description
Company/ Division	If you want to associate the E-Learning course to a specific organizational unit, such as a company or division, select from the multi-select list.
Job Family	If you want to associate the Read and Sign course to a specific job family or families, such as Administrative or Sales, select from the multi-select list.
Job Role	If you want to associate the Read and Sign course to a specific job role or roles (for example, Manager or Vice President), select from the multi-select list.
Job Title	If you want to associate the Read and Sign course to specific job title or titles (for example, Contracts Manager or Receptionist), select from the multi-select list.

Additional Details Tab of the Add Course Screen

The Additional Details Tab of the Add Course screen for a Read and Sign course contains the following fields.

Contents

Field	Description
Course Description	Enter a description for the course. Include keywords that will help students find the course when they perform searches.
Course May Be Retaken	Select **No** if students cannot take the course again after they have already taken it.
New Hire Orientation Course	Select this option if this course is part of your company's new hire orientation.
Course Recurring	Select **Yes** if this is a recurring course.
Course Recurring Interval	If this is a recurring course, specify the interval at which the course is repeated, in weeks.
Suppress Roster	Select this option to prevent students from seeing the names of the other students in the class.
Private Class	Select this option if the class is intended for a private audience.
Class Cost	Enter the cost that your organization pays to offer the class.

Field	Description
Student Fee	Enter the fee that the student pays to take the class.
Allow Students to Drop at Any Time	Select this option to allow students to drop the course at any time.

Approvals Tab of the Add Course Screen

The Approvals Tab of the Add Course screen for a Read and Sign course contains the following fields.

Contents

Field	Description
Approval Types	Select one or more roles of the people who must approve a student's enrollment in the course (for example, the employee's manager or the course instructor).

Skills Gained Tab of the Add Course Screen

The Skills Gained Tab of the Add Course screen for a Read and Sign course contains the following fields.

Contents

Field	Description
Available Items/ Selected Items	Select any number of skills that students will gain by taking the course. Students will be able to see and search on these skills when looking for courses to take. First select a category, then select the individual skills for the category. ▪ To select or clear individual skills, click the category to expand a list of each skill, then click the plus sign next to each skill you want to add to the Selected Items list. ▪ To select a skill level, click the arrow in the **Level** drop-down list and select **Beginner, Intermediate, Advanced, or Expert**. ▪ To remove a skill from the Selected Items list, click the red x next to that skill.

Competencies Gained Tab of the Add Course Screen

The Competencies Gained Tab of the Add Course screen for a Read and Sign course contains the following fields.

Contents

Field	Description
Available Items/ Selected Items	Select any number of competencies that students will gain by taking the course. Students will be able to see and search on these competencies when looking for courses to take. First select a category, then select the individual competencies for the category. ▪ To select or clear individual competencies, click the category to expand a list of each competency, then click the plus sign next to each competency you want to add to the Selected Items list. ▪ To rate the competency, click the arrow in the **Rating** field and select **1 — Seldom Meets Expectations, 2 — Meets Most Expectations, 3 — Meets All Expectations, 4 — Exceeds Expectations, 5 — Greatly Exceeds Expectations** ▪ To remove a competency from the Selected Items list, click the red x next to that competency. **Note:** Administrators are not required to select a skill level or competency rating for every item selected in the **Skills Gained** and **Competencies Gained** tabs. However, only items with a specified rating are added to users' competency profiles when the course is completed. In addition, because Competencies and Skills can be used as course search criteria, the Skills and Competencies Gained feature allows students who want to enhance their competency profiles to find courses relevant to their profile objectives via the Course Search function.

Prerequisite and Equivalent Courses Tab of the Add Course Screen

The Prerequisite and Equivalent Courses Tab of the Add Course screen for a Read and Sign course contains the following fields.

Contents

Field	Description
Prerequisite Courses	Click **Select Prerequisites** to specify any courses that a student must complete before enrolling in this course. To find a course, enter a full or partial course name, and click **Search**.
Equivalent Courses	Click **Select Equivalent Courses** to specify any courses that might be equivalent to this course. To find a course, enter a full or partial course name, and click **Search**.

Equipment Tab of the Add Course Screen

The Equipment Tab of the Add Course screen for a Read and Sign course contains the following fields.

Contents

Field	Description
Equipment Types/ Equipment	Select the equipment needed by the instructor. First select a category from the **Equipment Types** field, then select the individual pieces of equipment for the category. ▪ To select or clear individual items, click an item and use the single right arrow to move the item to the selected list, or click an item in the selected list and click the left arrow to remove it. ▪ To select or clear all of the items in a category, click any item and use the double left or double right arrows to move it to or from the selected list.

Topics Covered Tab of the Add Course Screen

The Topics Covered Tab of the Add Course screen for a Read and Sign course contains the following fields.

Contents

Field	Description
Topics Covered	Select one or more topics for the course (for example, Leadership, Safety, Cultural Sensitivity) from the list of topics that are set up for your organization. To add new topics, click , click **Drop-down and Multi-Select Lists** from the **Global Settings** section, and select **Topics Covered** from the **Select Listing** drop-down list.

Edit a Course

Follow these steps to edit a course.

To edit a course:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Courses**.
3. In the Courses screen, locate the course that you want to edit and in the **Actions** column, click .
4. In the drop-down list, select **Edit.**
5. In the Edit Course screen, edit the fields as necessary, then click **Save**.

> **Note:** Curricula that may be retaken can only contain courses that may be retaken. When editing a course, you cannot change the **Course May Be Retaken** field from **Yes** to **No** if the course belongs to a curriculum that can be retaken.

Test Template Screen

Instructors can create their own tests for a class or they can select from test templates that are already created for the course.

You can add questions of the following types to your templates.

Question Type	Description
True/False	The only possible answers are **True** and **False**.
Multiple Choice, Single Answer	Students select one answer from a list of choices.
Multiple Choice, Multiple Answer	Students select one or more answers from a list of choices.
Essay	Students enter their answers in paragraph form. These questions are not automatically scored.
Keyword	Students enter specific words in response to the question. You can weigh each keyword with a different value.

Display the Create Test Template Screen

Follow these steps to display the Create Test Template screen.

To display the Create Test Template screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Test Templates**.

Contents of the Create Test Template Screen

The Create Test Template screen displays the following fields.

General Information

Field	Description
Test Name	Enter a name for the test template (for example, Final Exam with Essay and Multiple Choice Questions).
Total Time (in minutes)	Enter the total number of minutes a student will have to complete the test.

Field	Description
Minimum Score	Enter the minimum score that a student needs to pass the test.
Start Message	Enter a message that students will see when they launch the test, including how long students will have to complete the test and any other special instructions.
Final Message	Enter a message that students will see when they finish the test.
Test Instructions	Enter any additional instructions that students might need to complete the test. These instructions display on the first screen of the test.

Questions

Field	Description
Question Type	Select the type of question: ▪ True/False ▪ Multiple Choice, Single Answer ▪ Multiple Choice, Multiple Answer ▪ Essay ▪ Keyword
Number of Answers	Select the number of answers you will provide for students to select from. (This field is not displayed for **True/False** and **Essay** questions.) For example, enter **3** if the student can select from three answers: Quickly, Accurately, and Thoroughly.
Test Question	Enter the question that students will see.
Special instructions for this question	Enter any information that the student needs to understand the question.
Maximum Choices	Enter the number of answers a student can select for a multiple choice question (for example, three answers out of eight).
Label/Keyword	Enter the possible responses that students can select.
Correct Answer	Identify the correct responses to the question.
Answer Value	Enter the value of this question. For example, you could have four questions, each worth three points.

Add a New Test Template

Follow these steps to add a test template.

To add a new test template for a course:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Test Templates**.
3. Select a course from the **Select Course** drop-down list.
4. Click **Create New Test Template**.
5. Enter information on the Create Test Template screen.
6. Click **Save & Continue**.
7. For each question, select a format (**True/False**, **Essay**, and so on) from the **Question Type** drop-down list.
8. Select the **Number of Answers** you will provide for students to select from. (This field is not displayed for **True/False** and **Essay** questions.)
9. Click **Add Question**.
10. Enter the question and possible answers.
11. Click **Save Question**.
12. Enter additional questions.
13. Click **Complete Test.**

Edit Test Templates

Follow these steps to edit test templates.

To edit an existing test template:

1. Click in the toolbar to display the Administration menu.
2. In the Learning section, click **Test Templates.**
3. Select a course from the **Select Course** drop-down list.
4. Click **Create New Test Template**.
5. Click **Manage Test Templates**.
6. Click next to the template that you want to edit.
7. Make changes to the template information or questions.
8. Click **Complete Test**.

Tuition Assistance Screen

The Tuition Assistance screen lets you view open and closed tuition assistance requests and make decisions about open requests.

If you are the designated Tuition Assistance Administrator, you can also configure tuition assistance.
The Tuition Assistance Administrator can request tuition assistance on behalf of a student.

Display the Tuition Assistance Screen

Follow these steps to display the Tuition Assistance Screen

To display the Tuition Assistance screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Tuition Assistance**.

Contents of the Tuition Assistance Screen

The Tuition Assistance screen displays the following fields, columns, and actions.

Fields/Columns

Field/Column	Description
Search	Use this section to find a tuition assistance request. Use one or more search parameters.
Select Student	Click this button to search for a request using the name of the employee or the employee's manager.
Class	Enter a partial or full class name to search for a class and see the students in the class who have requested tuition assistance.
Tuition Assistance Type	Select **Internal Classes** or **External Classes** to narrow your selection.
Open Tuition Assistance Requests	Use this section to review all requests that have not received a disposition. This means that no decision has been entered for these requests.
Employee	This is the employee's name. Click the name to display the employee's Total Talent Profile, including contact information.
Class Date	This is the day that the class starts.
Class	This is the class for which the employee submitted the request. Click the class name to see the Class Profile.
Student Fee	This is the fee that the student must pay to take the class.

Request Amount	This is the amount of tuition assistance that the student requested.
Pending Final Payment Assistance Requests	Use this section to review all requests that have been approved but for which the employee has not been fully paid.
Employee	This is the employee's name. Click the name to display the employee's Total Talent Profile, including contact information.
Class Date	This is the day that the class starts.
Class	This is the class for which the employee submitted the request. Click the class name to see the Class Profile.
Request Date	This is the date on which the employee submitted the request.
Request Amount	This is the amount of assistance that the employee requested.
Disposition Date	This is the date on which the Tuition Assistance Administrator rendered a decision on the request.
Disposition	This is the decision on the request: ▪ **Approved:** The request is approved for the amount shown. Once a request is approved, it is listed in the Pending Final Payment Assistance Requests section. ▪ **Rejected:** The request is rejected. ▪ **Cancelled:** The employee withdrew the request before or after it was approved.
Amount Approved	This is the amount of assistance that the Tuition Administrator approved.
Tuition Assistance Request History	Use this section to review all requests that have been completed, cancelled, or denied. The columns displayed in this section are the same as those described for the Pending Final Payment Assistance Requests section.
Request Tuition Assistance on Behalf of a Student	Use this section to enter a request on behalf of one or more employees.
Select Student	Click this button to search for an employee using the name of the employee or the employee's manager.
Request Tuition Assistance	Click this button to request tuition assistance for the employees you selected.

Actions

The buttons and icons on the Tuition Assistance screen perform the following actions.

Icon	Action	Description

	Configure Tuition Assistance	Click this button to display the Tuition Assistance Preferences screen, where you can make changes to how your organization's tuition assistance program works.
	View and Update	Click this icon to see details about the request, assign a disposition, enter the amount that has been approved, if any, and add comments or attachments.
	Employee Summary	Click this icon to see a summary of a single employee's tuition assistance history, including open requests and those pending final payment.
	Past Requests	Click this icon to see the Employee Summary for a single year of your choice.
	Email	Click this icon to open an email in your default email program, addressed to the student who is making the request.

Edit Internal Tuition Assistance Requests

Follow these steps to edit internal tuition assistance requests.

To edit an internal tuition assistance request:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Tuition Assistance**.
3. In the Open Tuition Assistance Requests section of the Tuition Assistance screen, click **View and Update** under the **Actions** column of the request that you want to update.
4. If necessary, in the Internal Classes Tuition Assistance Request Details section, click **Edit Request** and enter the changes to the Internal Classes Tuition Assistance Request Details form.
5. Click **Submit** to save your changes.

Edit External Tuition Assistance Requests

Follow these steps to edit external tuition assistance requests.

To edit an external tuition assistance request:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Tuition Assistance**.
3. In the Open Tuition Assistance Requests section of the Tuition Assistance screen, click **View and Update** under the **Actions** column of the request that you want to update.

4. If necessary, in the External Training Tuition Assistance Request Details section, click **Edit Request** and enter the changes to the External Classes Tuition Assistance Request Details form.

   Then, click **Submit** to save your changes.
5. If necessary, in the External Training Tuition Assistance Request Details section, click **Edit External Training** and enter the changes to the External Training details.

   Then, click **Save**.

Request Tuition Assistance on Behalf of a Student

Follow these steps to request tuition assistance on behalf of a student.

To request tuition assistance for an employee:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Tuition Assistance**.
3. On the Tuition Assistance screen, in the Request Tuition on Behalf of a Student section, click **Select Student.**
4. Search for an employee using the name of the employee or the employee's manager.
5. Select the employee.
6. Click Request Tuition Assistance to display a screen that lists all of the employee's current classes.
7. Click in the **Actions** column next to the class for which you are requesting assistance.
8. On the Tuition Assistance screen, enter the **Request Amount**, select the **Request Date,** and enter any comments (for example, the reason that the employee needs to take the class).
9. If you wish to attach a file to the request:
10. Enter an **Attachment Name** and **Attachment Description.**
11. Click **Browse** to find and upload the file.
12. Click **Add Attachment**.
13. Click **Submit** to send your request.
14. For external training tuition assistance requests, and only if you need to edit the External Training details, click in the **Actions** column next to the class for which you are requesting assistance. In the Edit External Training screen, enter the changes to the External Training details. Then, click **Save**.

Approve, Reject, or Cancel Requests

Follow these steps to approve, reject or cancel a request.

To enter a disposition for a request:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, **Tuition Assistance**.
3. Use the **Search** section to search for requests.
4. Click next to a request line to display information about the student, the class, and the request, including the student's tuition assistance cap.
5. Select a disposition of **Approve**, **Reject**, or **Cancel**, from the **Select Disposition** drop down list.
6. Enter the amount approved and any comments.
7. Click **Update Disposition**.
8. If you want to attach a file to the disposition, enter an attachment name, browse to the file, click **Open**, and click **Add Attachment**.

Cancel an Approved Request

Follow these steps to cancel a request.

To cancel a request that was already approved:

1. Click next to a request line.
2. Select **Cancelled** from the **Select Disposition** drop down list.
3. Click **Update Disposition**.

Record Payments to Employees

Once a request is approved, you need to record the tuition assistance payments dispersed to the employee.

All approved requests that are not fully paid off are listed in the Pending Final Payment Assistance Requests section.

To record a payment:

1. Click next to a request line.
2. In the **Payments** section, click **Add Payment**.
3. Enter a **Payment Name** (for example, **Initial Payment)**, and enter the amount of the payment and any comments.
4. Select **Final Payment** if the outstanding balance will be zero once you record this payment.

5. Click **Save**.

Tuition Assistance Preferences Screen

If you are the designated Tuition Assistance Administrator, you can control your organization's tuition assistance settings, including tuition assistance caps, dispositions, and types.

These settings are on the Tuition Assistance Preferences screen.

Display the Tuition Assistance Preferences Screen

Follow these steps to display the Tuition Assistance Preferences screen.

To display the Tuition Assistance Preferences screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Tuition Assistance**.
3. Click **Configure Tuition Assistance**.

Contents of the Tuition Assistance Preferences Screen

The Tuition Assistance Preferences screen displays the following fields and columns.

Tuition Assistance Caps

Field	Description
Job Family	If you are setting tuition caps based on job families, select a job family (such as **Administrative** or **Sales**) from the drop-down list. If you are setting one cap for the whole organization, select **Company** from the drop-down list.
Amount	Enter the total amount of tuition assistance that an employee can receive in a fiscal year.
Job Family	When you add a tuition assistance cap, the job family displays in the table below. You must click the to activate the cap.
Amount	When you add a tuition assistance cap, the amount displays in the table below. You must click the to activate the cap.

Tuition Assistance Dispositions

Field	Description
Disposition Name	Enter the name of a new disposition. For example, you may want more information about why tuition requests are being rejected. In addition to the **Denied** disposition, you may add the dispositions **Not Relevant to Job** and **Unqualified Trainer**.

Field	Description
Parent Disposition	Select **Approved**, **Denied**, or **Cancelled.** The new type will be based on this standard type. For example, **Cancelled by Student** would be based on **Cancelled**.
Disposition	This column lists all of your dispositions.
Protected	You cannot edit or delete the three default dispositions: **Approved**, **Denied**, and **Cancelled**. Therefore these are considered protected and identified by a **Yes** in the **Protected** column. All other dispositions have a **No.**
Parent Disposition	This is the standard disposition (**Approved**, **Denied**, or **Cancelled**) on which a new disposition is based. For standard dispositions (**Approved**, **Denied**, or **Cancelled**), the parent disposition is **Self**.
Actions	This column displays the actions that can be taken for each item in the table.

Tuition Assistance Types

Field	Description
Type Name	Enter the name of a new tuition assistance type (for example, **Online University**).
Sort Order	Enter a number to specify the order in which the new tuition assistance type displays in lists. For example, if you enter 3, the type displays as the third type in any list of types.
Parent Type	Select **Internal** or **External**. The new type is based on this standard type. For example, **Online University** would be based on **External.**
Admin Only?	Designate a tuition assistance type as **Admin Only** if you want only administrators to see and use it.
Type Name	This column lists all of your tuition assistance types.
Sort Order	This column shows the order in which tuition assistance types display in lists.
Protected	You cannot edit or delete the two types: **Internal** and **External**. Therefore these are considered protected and identified by a **Yes** in the **Protected** column. All other dispositions have a **No.**
Admin Only?	A **Yes** in this column means that only administrators can see and use the tuition assistance type.
Actions	This column displays the actions that can be taken for each item in the table.

Actions

The buttons and icons on the Tuition Assistance Preferences screen perform the following functions.

Icon/Button	Action	Description
	Tuition Assistance Administration	Click this button to display the Tuition Assistance screen, where you can view open and closed tuition assistance requests and assign dispositions to open requests.
	Add	Click this button to add a new tuition assistance cap, disposition, or type.
	**Activate**	Click this icon to put a tuition assistance cap into use.
	**Deactivate**	Click this icon to take a tuition assistance cap out of use.
	**Edit**	Click this icon to edit the information for a tuition assistance disposition or type. You cannot edit the default dispositions (**Approved**, **Denied**, and **Cancelled**).
	**Delete**	Click this icon to delete a tuition assistance disposition or type. You cannot edit the default dispositions (**Approved**, **Denied**, and **Cancelled**) or types (**Internal** and **External**).

Sections of the Tuition Assistance Preferences Screen

The Tuition Assistance Preferences screen has three sections.

Section	Description
Tuition Assistance Caps	Use this section to establish separate tuition assistance caps for your organization's different job families. For instance, you may set a higher cap for your IT staff, who have ongoing technical training needs, than for your warehouse staff. Or you can set a single cap for all employees in the organization.
Tuition Assistance Dispositions	Use this section to establish the dispositions that you can assign to tuition assistance requests. Deltek Talent Learning comes with three default dispositions: **Approved**, **Denied**, and **Cancelled**. The default types cannot be edited or deleted. Administrators can add additional dispositions, based on the three default dispositions. For example, you may add a new disposition, **Cancelled by Student**, based on a parent disposition of **Cancelled.**

Tuition Assistance Types	Use tuition assistance types to identify how the learning experience is delivered. Deltek Talent Learning comes with two default tuition assistance types: ▪ **Internal**, for learning that is delivered in-house, but by a third party that charges the student a fee. ▪ **External**, for learning that is provided outside of the office, by an outside organization that charges the student tuition or a fee. The default types cannot be edited or deleted. Administrators can add additional types, based on the two default types. For example, you may add an **Online University** type that is based on the parent type of **External**.

Add Tuition Assistance Caps

You can establish separate tuition assistance caps for your organization's different job families.

For example, you may set a higher cap for your IT staff, who have ongoing technical training needs, than for your warehouse staff. Or you can set a single cap for all employees in the organization.

To establish tuition assistance caps:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Tuition Assistance**.
3. Click **Configure Tuition Assistance**.
4. In the Tuition Assistance Caps section, complete one of the following steps:
   - To set a single cap for all employees in the organization, select **Company** from the **Job Family** drop-down list, and enter the company-wide cap in the **Amount** field.
   - To set separate caps for different job families, select each job family from the **Job Family** drop-down list, and enter a family-specific cap in the **Amount** field.
5. Click **Add.**
   Information about the cap displays in the table below.
6. Click the to activate the cap, which puts it into use.

Add Tuition Assistance Dispositions

Follow these steps to add tuition assistance dispositions.

Deltek Talent Learning comes with three default tuition assistance dispositions: Approved, Denied, and Cancelled. You can also add dispositions. Each new disposition must have one of the default dispositions as its parent.

To establish tuition assistance dispositions:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Tuition Assistance**.
3. Click **Configure Tuition Assistance**.
4. In the **Tuition Assistance Dispositions** section, enter a name for the new disposition, and select a **Parent Disposition** (**Approved**, **Denied**, or **Cancelled**).
5. Click **Add**.

Add Tuition Assistance Types

Follow these steps to add tuition assistance types.

Deltek Talent Learning comes with two default tuition assistance types: Internal and External. You can also add types. Each type must have one of the default types as its parent.

To establish tuition assistance types:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Tuition Assistance**.
3. Click **Configure Tuition Assistance**.
4. In the **Tuition Assistance Types** section, enter a name for the new type, a **Sort Order**, a **Parent Type**, and a value for the **Admin Only?** field.
5. Click **Add**.

E-Learning Setup Wizard

SCORM and AICC are standards that govern the packaging and tracking of online learning content for use in a learning management system.

Deltek Talent Learning supports these standards. You can upload SCORM and AICC learning packages to Deltek Talent Learning and make them available for your students to use.

However, if you have never used e-learning content before, the Learning module must first configure your company training site so that it can accept and launch content.

The E-Learning Settings screen allows you to access and manage your company's FTP settings.

Display the E-Learning Settings Screen

Follow these steps to display the E-Learning Settings Screen.

To display the the E-Learning Settings screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **E-Learning Setup Wizard**.

> **Note:** Completing the FTP fields on this screen is optional. However, it is necessary if you want to load content from your FTP server.

> **Note:** The wizard launches automatically if you attempt to create an e-learning course from the Add Course screen (**Administration** » **Learning** » **Courses & Classes** » **Courses** » **Create a New Course**) and the Learning module detects that e-learning settings have not yet been configured for your company.

Configure the E-Learning Setup Wizard

Follow these steps to configure the E-Learning Setup Wizard.

To configure the E-Learning Setup Wizard:

1. On the Step 1: Welcome section of the wizard, read the summary explanation about the E-Learning Setup Wizard, then click **Next.**
2. On the Step 2: FTP Setting section of the wizard, complete all the fields listed below if you want to configure the Learning module to load content from your FTP server:

Field	Description
E-Learning Import FTP Protocol	The FTP protocol to use (SFTP, FTP, FTP/SSL, etc.)
E-Learning Import FTP Hostname	The FTP server's hostname
E-Learning Import FTP Port	The FTP port number (usually based on protocol)
E-Learning FTP Username	The username for authenticating FTP connections.
E-Learning FTP Password	The password for authenticating FTP connections.

Leave all the fields blank if you do not need to load content from your company FTP server.

> **Note:** Note, however, that unless you populate these fields, you will only be able to use the **PC** upload package option on the E-Learning Package Import tab of the Add Course screen.
>
> **PC** package uploads have a maximum file size limit of 250MB.
>
> **FTP** package uploads have a maximum file size limit of 2GB.

3. On the Step 3: Review section of the wizard, the E-Learning Settings application will display and validate the values that you entered by attempting to connect to the indicated FTP server.
4. If you entered no values in Step 2, the fields should reflect blank values. Click **Finish**.

5. If you entered values in Step 2 and the connection was successful, click **Finish**.
6. If you entered values in Step 2 and the the connection fails, a detailed error message is displayed to help you correct the settings. Correct the fields, then click **Next**.

   Repeat until you receive a validation message that the connection is successful, then click **Finish**.

EPIQ Jobs

This screen allows administrators and Learning Managers to monitor and manage queued E-learning Package Import Jobs.

The E-Learning Package Import Queue (EPIQ) itself is processed in the background and is responsible for forwarding queued packages to the Learning platform, retrieving newly loaded courses' information, and creating related Courses and Classes so that the Learning module can later make the content available to students.

Display the EPIQ Jobs Screen

Follow these steps to display the EPIQ Jobs Screen.

To display the EPIQ Jobs screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **EPIQ Jobs**

Contents of the EPIQ Jobs Screen

The EPIQ Jobs screen displays the following columns and actions.

Columns

Column	Description
E-Learning Import Job File Name	This is the name of the imported file.
Job Owner	This is the person who created the course. This person can perform the same administrative actions as the Learning Administrator, but only for the courses that he or she created.
Date Created	This is the date when the EPIQ Job was created.
Status	This indicates the job status (**On Hold, Ready, Processing, Completed, Failed, Skipped, Cancelled)**.
Date Ready	This is the date this Job was set to **Ready** status.
Date Processed	This is the date the Job was processed.
Actions	This column displays the actions that can be taken for each item in the table

Actions

The **Actions** you can perform on the EPIQ Jobs column are as follows:

Icon	Action	Description
	View	Click this icon to view the details of the job file.
	Change Status	Click this icon to change the **Status** into one of the following: ▪ **Put On Hold**: Stop the job processing on a temporary basis. This is useful, for example, if you want to edit the data before moving the job to **Ready** status. You can also select this status if you have uploaded a Multi-course package and want to edit the course information for a subset of the child jobs spawned from that package before allowing them to be processed. ▪ **Mark as Ready**: Update the status of a job to **Ready**. This action may only be performed on jobs in **On Hold** status. ▪ **Process**: Process the job. This action may be performed on any job in **On Hold** or in **Ready** status. ▪ **Cancel**: Cancel the job.
	View Childs	This icon displays only for multi-course packages. Click this to view the child jobs for multi-course file.

Uploading Multi-Course vs. Single Course

A major difference to note between uploading a multi-course and uploading a single course is that after you have successfully uploaded a single course, it immediately becomes available for enrollment to students so long as the following conditions are met:

- The **Status** of the course after processing is **Open**;
- The corresponding e-learning package for the course has been processed; and
- The e-learning package **Job Status** is **Completed**.

Multi-courses, however, are not immediately available. This is because creating a multi-course is similar to uploading several courses in bulk. All courses in the multi-course package must be processed individually before they can be available for enrollment to students. The import queue is automatically processed in batches on an hourly basis, but jobs may be processed at any time from the EPIQ Jobs screen.

> **Note:** The **E-Learning Import Batch Size** System Setting controls the number of jobs that are processed per run on an hourly basis.
>
> The **E-Learning Import Staging Directory** System Setting defines the location where the imported e-learning packages are stored after they are uploaded into the Learning module.
>
> Both settings are located under the General section of the Settings screen (**Administration** » **Global Settings** » **System Administration** » **System Settings** » **General**).

Filter EPIQ Jobs

Follow these steps to filter EPIQ jobs.

To filter the EPIQ Jobs listing:

1. Click **Filter** at the top of the screen to search for classes based on search criteria.
2. Supply one or more of the following search values.

Field	Description
File Name	Enter all or part of the package name.
Job Status	Search based on the current status of the class. You can choose multiple values. ▪ **On Hold** ▪ **Ready** ▪ **Processing** ▪ **Completed** ▪ **Failed** ▪ **Skipped** ▪ **Cancelled**

3. Click **Filter**.

Bulk Process EPIQ Jobs

Follow these steps to bulk process EPIQ jobs.

To process EPIQ Jobs in bulk:

1. Select the check box next to the E-Learning Import Job filenames that you want to process.

2. In the **Bulk Process** drop-down list at the botton of the screen, select from the following **Status** options:
   - **On Hold**
   - **Ready**
   - **Processing**
   - **Cancelled**
3. Click Change **Status**.

Curricula

Use this Learning Configuration menu to manage curricula for your organization.

A curriculum is a set of courses with a common theme or learning objective. For example, the New Managers curriculum may include three courses: Coaching Employees, HR Policies and Procedures, and Scheduling Personnel.

Manage Curricula Screen

Use the Manage Curricula screen to see all of the curricula that have been created for your organization and to add and modify curricula.

A curriculum is a set of courses with a common theme or learning objective. For example, the New Managers curriculum may include three courses: Coaching Employees, HR Policies and Procedures, and Scheduling Personnel.

Display the Manage Curricula Screen

Follow these steps to display the Manage Curricula Screen.

To display the Manage Curricula screen

1. Click in the toolbar to display the Administration menu.
2. In the Learning section, click **Manage Curricula**.

Contents of the Manage Curricula Screen

The Manage Curricula screen displays the following columns actions.

Columns

Column	Description
Curriculum	This is the curriculum name. Click it to see the Curriculum Profile, which includes a description of the curriculum and all of the courses it includes.

Curriculum Owner	When you create a curriculum, you can assign it an owner, who is the employee for the curriculum. Your choice displays here. Click the employee name to see the employee's Total Talent Profile.
Company/Division	This is the specific organizational unit, such as a company or division, with which the curriculum is associated.
Job Family	This is the job family or families (for example, Administration or Sales) with which the curriculum is associated. The job family is **Global** if the class is for all employees, enterprise-wide.
Locations Management	This is the location or locations where the curriculum will be used.
Job Role	This is the job role or roles (for example, Manager or Vice President) with which the curriculum is associated.
Job Title	This is the job title or titles (for example, Contracts Manager or Receptionist) with which the curriculum is associated.
Require Manager Approval for Enrollment	This column indicates whether or not employees must receive approval from their manager to enroll in this curriculum. If the employee tries to enroll, an email is sent to the employee's manager, asking for the enrollment to be approved or denied in Deltek Talent Management
May Be Retaken	This column indicates whether or not the curriculum can be retaken.
Description	This is a description of the curriculum.
Courses	This is the number of courses in the curriculum. Click the number to see a list of the courses by name. From this list, you can add courses to the curriculum or delete existing courses.
Status	This column indicates which of the following states the curriculum currently falls under: ■ **Draft**: This is the status for newly-created courses that are not yet open to students for enrollment. Note that courses can be added to or removed from a curriculum only while it is in this status. ■ **Archived**: This is the status for courses that are inactive but still visible in User Total Talent Profiles. ■ **Inactive**: This is the status for courses that must no longer be used. ■ **Open**: This is the status for courses that are open and available for student enrollment.
Actions	Click ⋮ for a list of actions that can be taken for each item in the table.

Actions

The buttons and icons on the Manage Curricula screen perform the following functions.

Icon/Button	Action	Description
	Create New Curriculum	Click this button to display the Add Curriculum screen, where you can create a new curriculum
	Mark as New Hire Orientation Curriculum	Click this icon to indicate that the curriculum should be part of your company's new hire orientation process. When a new hire is made, the recruiter or hiring manager can enroll the new employee in the New Hire Curriculum during the Onboarding process.
	Send Email	Click this icon to open an email in your default email program, addressed to the curriculum owner.
	Edit	Click this icon to edit general information about the curriculum, such as the curriculum owner's name and the curriculum description.
	Clone Curriculum	Click this icon to clone this curriculum.
	Add a Course	Click this icon to add a course to the curriculum.
	Delete	Click this icon to delete the entire curriculum. You can delete a curriculum only if there are no courses or active classes associated with the curriculum.
	Unable to Delete	This icon displays if there are courses or active classes associated with the curriculum, meaning that you can't delete it.

Search for a Curriculum

Follow these steps to search for a curriculum.

To search for a curriculum:

1. Click in the toolbar to display the Administration menu.
2. In the Learning section, click **Manage Curricula**.
3. Click **Filter**.
4. Enter a full of partial curriculum name or search for curricula based on criteria such as **Job Title** or **Location**.
5. Click **Filter**.

Edit a Curriculum

Follow these steps to edit a curriculum.

To edit a curriculum:

1. On the Manage Curricula screen, locate your newly-created curriculum.
2. On the **Actions** column, click ⋮ , then select **Edit**.
3. Edit the fields in the form as required.

   Note: If you edit the **Status** field, note the following options:

   Open: Select this if you want to enable students to enroll in the curriculum.

   Archive: Select this if you want to set the curriculum as inactive but still visible in User Total Talent Profiles.

4. If applicable, click **New Hire Orientation Curriculum** if you want to include the curriculum in your company's new hire orientation process.
5. If applicable, click **Require Manager Approval for Enrollment** if you want the students to first receive approval from their managers in order to enroll in this curriculum. If the employee tries to enroll, an email is sent to the employee's manager, asking for the enrollment to be approved or denied in Deltek Talent Management.
6. If applicable, click **May Be Retaken** to allow students to take the curriculum again.
7. If applicable, click **Auto-Enroll** to automate the enrollment of students into this curriculum based on the associated values in the following fields: **Company**, **Job Family**, **Job Role**, **Job Title**, and **Location**.
8. All students who are enrolled or awaiting approval from the parent curriculum are automatically transferred to the clone record. If applicable, click **Recalculate Completed Students' Progress on Course Change** if you want the application to compute the completion percentage of the students. This is particularly important if you added or deleted courses from the clone curriculum.
9. Click **Save**.
10. If you selected the **Recalculate Completed Students' Progress on Course Change** checkbox, click one of the following options from the confirmation screen.

    - **Yes:** The application will recalculate the completion percentage for both **Enrolled** students and **Completed** students. Students who initially had a **Status** of **Completed**, but have a recalculated progress percentage that is less than 100% will be moved to the **Enrolled** bucket. This indicates that they still have courses to complete for that curriculum.
    - **No:** The application will recalculate the completion percentage for **Enrolled** students only.

    The confirmation screen appears if you selected the **Recalculate Completed Students' Progress on Course Change** checkbox and you have added or removed courses with already-enrolled students from the curriculum.

Clone a Curriculum

Follow these steps to clone a curriculum.

To clone a curriculum:

1. On the Manage Curricula screen, locate the curriculum that you want to clone.
2. On the **Actions** column, click ⋮ , then select **Clone Curriculum**.
3. Enter a unique name for the new curriculum.
4. Click **Save**.
5. Back on the Manage Curricula screen, locate the newly-created clone curriculum.

   This curriculum is always in **Draft** status and bears the same values as the parent in all aspects – linked courses, owner, description, associations (company/division, job family, locations) etc.
6. On the **Actions** column, click ⋮ , then select **Edit**.
7. In the **Status** field, choose one of the following options:
   - **Draft**: Leave it in this default value if you still need to add or remove courses to the curriculum.
   - **Open**: Select this if you want to enable students to enroll in the curriculum.
   - **Archive**: Select this if you want to set the curriculum as inactive but still visible in User Total Talent Profiles.
8. If applicable, click **New Hire Orientation Curriculum** if you want to include the curriculum in your company's new hire orientation process.
9. If applicable, click **Require Manager Approval for Enrollment** if you want the students to first receive approval from their managers in order to enroll in this curriculum. If the employee tries to enroll, an email is sent to the employee's manager, asking for the enrollment to be approved or denied in Deltek Talent Management.
10. If applicable, click **May Be Retaken** to allow students to take the curriculum again.
11. If applicable, click **Auto-Enroll**to automate the enrollment of students into this curriculum based on the associated values in the following fields: **Company**, **Job Family**, **Job Role**, **Job Title**, and **Location**.
12. All students who are enrolled or awaiting approval from the parent curriculum are automatically transferred to the clone record. If applicable, click **Recalculate Completed Students' Progress on Course Change** if you want the application to compute the completion percentage of the students. This is particularly important if you added or deleted courses from the clone curriculum.
13. Click **Save**.
14. If you selected the **Recalculate Completed Students' Progress on Course Change** checkbox, click one of the following options from the confirmation screen.
    - **Yes:** The application will recalculate the completion percentage for both **Enrolled** students and **Completed** students. Students who initially had a **Status** of **Completed**, but have a recalculated progress percentage that is less than 100% will

be moved to the **Enrolled** bucket. This indicates that they still have courses to complete for that curriculum.

- **No:** The application will recalculate the completion percentage for **Enrolled** students only.

The confirmation screen appears if you selected the **Recalculate Completed Students' Progress on Course Change** checkbox and you have added or removed courses with already-enrolled students from the curriculum.

Add Curriculum Screen

Use the Add Curriculum Screen to create a new curriculum and make it available to students,

Display the Add Curriculum Screen

Follow these steps to display the Add Curriculum Screen.

To display the Add Curriculum screen:

1. Click in the toolbar to display the Administration menu.
2. In the Learning section, click **Manage Curricula**.
3. Click **Create New Curriculum**.

Contents of the Add Curriculum Screen

The Add Curriculum screen displays the following fields.

Contents

Field	Description
Curriculum	Enter a name for the curriculum. A curriculum is a set of courses with a common theme or learning objective. For example, the New Managers curriculum may include three courses: Coaching Employees, HR Policies and Procedures, and Scheduling Personnel.
Curriculum Owner	Click **Select Curriculum Owne**r to identify the employee who is responsible for the curriculum.
Status	Select **Draft.** This is the default status for a newly-created curriculum. During the initial curriculum creation step, courses can be added to or removed from a curriculum only while it is in this status. You can later on edit the curriculum, to change this field into one of the following values: ▪ **Archived**: This indicates that the courses in the curriculum are inactive but still visible in User Total Talent Profiles.

Field	Description
	■ **Inactive**: This indicates that the courses in the curriculum must no longer be used. ■ **Open**: This indicates that the courses in the curriculum are open and available for student enrollment.
New Hire Orientation Curriculum	Select this option to indicate that the curriculum should be part of your organization's new hire orientation process. When a new hire is made, the recruiter or hiring manager can enroll the new employee in the New Hire Curriculum during the Onboarding process.
Number of days after start date to complete	If you select **New Hire Orientation Curriculum,** you must specify the number of days that the employee has to complete the curriculum after the employee's start date.
Require Manager Approval for Enrollment	Select this option if an employee must receive approval from his or her manager to enroll in this curriculum. If the employee tries to enroll, an email is sent to the employee's manager, asking for the enrollment to be approved or denied in Deltek Talent Management
May Be Retaken	Select this option to set whether the curriculum can be taken again.
Auto-Enroll	Select this option to automate the enrollment of students into open curricula based on the associated values in the following fields: **Company**, **Job Family**, **Job Role**, **Job Title**, and **Location**. This check box displays only if the **Curriculum Auto-Enroll** setting is enabled on the System Setting screen (**Administration** » **Global Settings** » **System Administration** » **System Settings**)
Organizational Unit	In the first field, select the specific organizational unit, such as a company or division, with which the curriculum is associated. In the second field, narrow your choice further.
Job Family	Select the job family or families (for example, Administration or Sales) with which the curriculum is associated.
Job Role	Select the job role or roles (for example, Manager or Vice President) with which the curriculum is associated.
Job Title	Select the job title or titles (for example, Contracts Manager or Receptionist) with which the curriculum is associated.
Location	Select the location or locations (for example, London or Dubai) with which the curriculum is associated.
Curriculum Description	Enter a description of the curriculum.

Automatic Enrollment in a Curriculum

The Add Curriculum screen includes several fields used to identify employees and enroll them in the curriculum: **Organizational Unit**, **Job Family**, **Job Role**, **Job Title**, and **Location**.

Students receive email notifications that they have been enrolled.

Employees who match the values in these fields are automatically enrolled in the curriculum, according to these rules:

- If a single item is selected in each field, an employee is enrolled if he or she matches ALL of the selections.
- If multiple items are selected in a field, an employee is enrolled if he or she matches ANY of the selections.
- If items are selected from several fields, and several items within a field are also selected, all selections are taken into account in enrolling an employee.

Create a New Curriculum

Follow these steps to create a new curriculum.

To create a new curriculum:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Manage Curricula**.
3. Click **Create New Curriculum**.
4. Enter information on the Add Curriculum screen.
5. In the **Status** field, select **Draft**.
   This is the default and only available value at the initial curriculum creation step. You must edit this field later on if you want to enable the curriculum for student enrollment or set it as archived,
6. Click **Save.**
7. Add courses to the curriculum:
8. On the Manage Curricula screen, find the curriculum that you created.
9. Click **Add a Course** in the **Actions** drop-down.
10. Click **Select a Course**.
11. Select all of the courses that you want to include.
12. Click **Add All Selected**, and click **Confirm Selection**.
13. Close the search window, and click **Save**.

Edit a New Curriculum

Follow these steps to edit a new curriculum.

To edit your newly-created curriculum:

1. On the Manage Curricula screen, locate your newly-created curriculum.
2. On the **Actions** column, click ⋮ , then select **Edit**.
3. In the **Status** field, select one of the following:
   - **Open**: Select this if you want to enable students to enroll in the curriculum.
   - **Archive**: Select this if you want to set the curriculum as inactive but still visibile in User Total Talent Profiles.
4. Click **Save**.

Certifications

Use this Learning Configuration menu to manage the certifications for your organization.

The Learning module allows you to award students a certificate based on a set of curriculum they must take. Using this menu, you can designate the curriculum required for Certification.

Certifications Screen

You can set up a certification program whereby, when a student completes one or more courses or curricula, you award the student with a certification.

This includes granting the student a physical certificate, similar to a diploma. Use the Certifications screen to see existing certification programs, create new ones, and grant certifications to employees.
When a student earns a certification, the certification displays in the student's listing of certifications (**Learning** » **Certifications**), marked as an Internal Certificate.

Display the Internal Certifications Screen

Follow these steps to display the Certifications Screen.

To display the Internal Certifications screen:

1. Click ⚙ in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Internal Certifications**.

Contents of the Certifications Screen

The Certifications screen displays the following columns and actions.

Click **Add New Certification** to create a new internal certification record.

Click **View Internal Certificate Template** to view the page layout for Certificates of Completion generated by the Learning module.

Columns

Column	Description
Certification	This is the name of the certification (for example, CPR Training).
Description	This is a description of the certification.
Duration (Days)	This indicates the number of days that the certification is valid from the date it was earned if the **Certification Should Expire After a Specific Amount of Time** check box was selected during the creation of the certification. This displays the value **Permanent** if the **Certification Should Expire After a Specific Amount of Time** check box was not selected during the creation of the ceritication.
Learning Acquired	This column lists the curricula and courses that the employee completed to earn the certification or course associated with the certification.
Status	This column displays the status of the certification.
Actions	This column displays the actions that can be taken for each item in the table.

Actions

The buttons, links, and icons on the Certifications screen perform the following functions.

Icon/Button	Action	Description
	Add New Certifications	Click this button to display the Add/Update Certification screen.
	View Internal Certificate Template	All by clicking this link. Click to edit the physical certificates are based on a single format, which you can see certificate format.
	Edit	Click this icon to modify the details of the certification, such as how long it is valid and what curricula a student must complete to earn it. If the status of the certification is **Draft**, then all fields are editable. If the status of the certification is **Active**, then only the following fields are editable: ▪ **Acronym** ▪ **Name**

		▪ **Description** ▪ **Issued By** ▪ **Status (with Active or Archived options)** ▪ **Archived Date** ▪ **Notify Users before/after expiration checkboxes** ▪ **All notification-related fields** ▪ **All recipient notification fields** If the status of the certification is **Archived**, then all fields are read-only.
	Grant Certifications	Click this icon to display a list of all of the students who have completed the required Learning Objective and grant certifications to them. This button is disabled if there are no students with certifications to grant.
	Delete	Click this icon to delete the certification. This is enabled only if the status of the certification is **Draft**. Active and archived certifications cannot be deleted.

Granting of Certifications

Students may be manually or automatically granted certifications in instances where **Archived** or **Open** curricula are associated with **Active** or **Archived** certifications.

However, certification may be granted only if the students have completed the curricula **on or before the expiration dates** of the associated certifications.

Certification applies only to the curriculum/certification status combinations listed below. Any other curriculum/certification station combination means the student cannot be granted certification:

Curriculum Status	Certification Status
Open	Active
Open	Archived
Archived	Archived
Archived	Active

Grant a Certification

Follow these steps to grant a certification.

To grant a certification to an employee:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Certifications**.
3. Find the certification and click next to it.
   You see a list of all of the employees who have earned the certification.

   > **Note:** If the icon is enabled, this indicates that action is required. The icon is disabled when there are no certificates to grant..

4. Select employees individually or select the check box at the top of the list to select all eligible employees.
5. Click **Grant Certifications**.
6. Click **View All Certifications** when you finish granting certifications.

Automate the Granting of Certifications

Follow these steps to automate the process of granting certifications.

To automate the granting of certifications:

1. Click in the toolbar to display the Administration menu.
2. In the **System Administration** section under **Global Settings**, click **System Settings**.
3. Click **Certifications** to expand the section.
4. In the **Automatically Grant Certifications** row, select **Yes.**
5. Click **Update**.

   > **Note:** Automatic granting of certifications is handled by the lms_certifications_auto_grant cron. This is scheduled to run every 12:00am US Central Time.

Add/Update Certifications Screen

Use the Add/Update Certification screen to set up a new certification or modify an existing one.

Display the Add/Update Certifications Screen

Follow these steps to display the Add/Update Certifications Screen.

To display the Add/Update Certification screen:

1. Click in the toolbar to display the Administration menu.
2. In the Learning section, click **Certifications**.
3. Complete one of the following steps:
   - To create a new certification, click **Add New Certification**.
   - To modify an existing certification, click next to the certification line.

Contents of the Add/Update Certifications Screen

The Add/Update Certification screen displays the following fields.

Contents

Field	Description
Acronym (if any)	Enter an abbreviation for the certification (for example, CPR for cardiopulmonary resuscitation).
Certification For	Select whether the certificate is for a **Course** or a **Curriculum**.
Course Name	This appears if you selected **Course** in the **Certification For** field, Click **Select Course** to search for the individual courses that an employee must complete to earn the certification.
Curricula	This appears if you selected **Curriculum** in the **Certification for** field. The left field lists all of the curricula created for your organization. In the drop-down field, select the curricula that an employee must complete to earn the certification. To select a curriculum, click the curriculum and use the right arrow to move it to the field on the right. When adding curricula to certifications, it is important to note the following conditions: ▪ If the certification is still in **Draft** status, then you can only add curricula that are in **Draft** or **Open** status. ▪ An Active certification cannot have a Draft curriculum as its objective. This means that you will not be able to change the

Field	Description
	certification **Status** from **Draft** to **Active** unless the curriculum **Status** is also **Active**.
Name	Enter the name of the certification (for example, Cultural Sensitivity).
Description	Enter a description for the certification.
Certification Should Expire After a Specific Amount of Time	Leave this check box unselected to indicate that a certificate has no expiration date. Select this check box to indicate that a certification has an expiration date.
Valid for (Days)	Enter the number of days that the certification is valid from the date it was earned. This field appears only if the **Certification Should Expire After a Specific Amount of Time** check box is selected.
Issued by (Default)	Enter the name of the entity that issues the certification. This could be the name of your company or of a particular department or business unit.
Required to Perform Job Duties	Select this option if employees need this certification to perform their job duties. In general, this option would not apply to all employees in a company, because people with different jobs would not need the same certifications. Therefore, it makes sense to use the **Required to Perform Job Duties** setting for certifications that are associated with specific job titles, organizations, or companies. To make this association, you must associate the courses that make up the certification with the specific job title, organization, or company.
Number of Days to Notify Before Expiration	Enter the number of days before the certification expires that email reminders are first sent. For example, enter 30 to start sending reminders 30 days before the certification expires. The default value in this field is based on the value indicated in the **Expiring Certification Notification Period** setting on the **System Settings** » **Certifications** screen.
Frequency (Days) of Reminders Before Expiration	Enter the number of days between email reminders before the certification expires. For example, enter 2 to send a reminder every other day before the certification expires. The default value in this field is based on the value indicated in the **Expiring Certification Reminder Frequency** setting on the **System Settings** » **Certifications** screen.
Number of Days to Notify After Expiration	Enter the number of days after the certification expires that email reminders are sent. For example, enter 30 to stop sending reminders 30 days after the certification expires.

Field	Description
	The default value in this field is based on the value indicated in the **Stop Expired Certification Reminders** setting on the **System Settings** » **Certifications** screen.
Frequency (Days) of Reminders After Expiration	Enter the number of days between email reminders after the certification expires. For example, enter 1 to send a reminder every day after the certificate expires. The default value in this field is based on the value indicated in the **Expired Certification Reminder Frequency** setting on the **System Settings** » **Certifications** screen.
Reminder Notification Recipient	Select the people who should receive reminders: the employee, the employee's manager, and/or the administrator. To select a role, click the role and use the right arrow to move it to the field on the right.
Archive Date	Enter a date in this field to specify the end-of life (EOL) or sunset date for the certification. The date must be on or after the current date. This warning message displays when you set the archive date to the current date: "This certification (including its archive date) may be modified up to the days before the specified date. Once the date has passed, this Certification will be archived. WARNING: Certification archival is permanent; certifications cannot be altered after they are archived. Do you wish to continue?" Clicking **Yes** automatically archives the certification and returns you to the certifications management page. Clicking **Cancel** closes the dialogue box and retains you in the Edit Certification page.
Publication Date	This field is populated only if the status of the certification is active. It displays the date and time when the **Status** of the certification is set to **Active**.
Published By	This field would only reflect once the status of certification is active. The value is based on the user who set the status of the certification to 'Active' This field is populated only if the status of the certification is active. It displays the user ID who set the **Status** of the certification to **Active**.

Add a New Certification

Follow these steps to add a new certification.

To add a new certification:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Certifications**.

3. Click **Add New Certification**.
4. Enter information about the new certification, including the requirements to earn it.
5. Click **Submit**.

Modify a Certification

Follow these steps to modify a certification.

To modify an existing certification:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Certifications**.
3. Find the certification and click next to it.
4. Modify the information about the certification.
5. Click **Submit**.

Edit Template Screen

All certificates that are granted through the certification program are based on a single format.

You can modify this format, meaning that your changes will affect all certificates generated in the future. Use the Edit Template screen to make these changes.

Display the Edit Template Screen

Follow these steps to display the Edit Template Screen

To display the Edit Template screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Certifications**.
3. Click **View Internal Certificate Template** to see the current template, and close it when done.
4. Click next to **View Internal Certificate Template** to display the Edit Template screen.

Contents of the Edit Template Screen

The Edit Template screen has the following options.

Contents

Field	Description
Page Size	Select A4 or letter size paper. The default is letter size. The page orientation is landscape and cannot be changed.

Field	Description
Available Merge Codes	Use **Click to view complete listing** to see a list of the merge codes that you can use in a certificate. A merge code is a variable that will be replaced with a real value when the certificate is generated. For example, the merge code [student_name] is replaced with the student's real name when the certificate is generated. The standard merge codes are: ▪ **[student_name]:** The employee's name ▪ **[student_org_level]**: The organizational unit to which the employee belongs ▪ **[certificate name]**: The name of the certificate ▪ **[certificate expiration]**: The date that the certificate expires ▪ **[certificate date]:** The date that the certificate was awarded Click ➕ to add a merge code to the **Certificate Text** field. Then reposition the code to the appropriate place in the field.
Background Image	Click **Add New Image** to add an image, such as a border, to serve as the certificate's background. The image can be a JPG, GIF, or PNG file and must be no bigger than 600 pixels wide x 825 pixels high. You may add multiple images, if you wish. The drop-down list contains any previously uploaded images. Select one of these, or click **Add New Image** to browse for an image file and click **Upload** to upload it. A thumbnail of the image displays. Only one image at a time may be used as the certificate's background image. Select **None** from the drop-down list to use no image.
Certificate Text	Enter the text of the certificate into the **Certificate Text** field. Position the text so that it aligns correctly with the background and middle images. The final certificate may look slightly different from the contents of the **Certificate Text** field. Click **Preview** to see how the final certificate text will look.
Middle Image	Click **Add New Image** to add an image, such as a logo or medallion, in the body of the certificate. The image can be a JPG, GIF, or PNG file and must be no bigger than 600 pixels wide x 825 pixels high. You will be prompted to align the image on the **Left**, **Center**, or **Right**. The drop-down list contains any previously uploaded images. Choose one of these or click the **Add New Image** link to browse for a new image file and click **Upload** to upload it. A thumbnail of the image displays. You can use multiple images if you wish. Select **None** from the drop-down list to use no image.

Edit the Certificate Template

Follow these steps to edit the certificate template.

To edit the template on which all certificates are based:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Certifications**.
3. Click **View Internal Certificate Template** to see the current template, and close it when done.
4. Click next to **View Internal Certificate Template** to display the Edit Template screen.
5. Use the elements on the screen to change the text, graphics, and size of the certificate.
6. Use the buttons at the bottom of the screen to save or discard your changes:
   - Click **Preview** to see the current state of the certificate.
   - Click **Save** to save your changes.
   - Click **Cancel** to discard your changes.

Import External Certifications Screen

Use this screen to upload in bulk the external certification information of your company's users.

To import external certifications:

1. Click in the toolbar to display the Administration menu .
2. In the **Learning**section, click **Import External Certifications**.
3. Click the link to download the sample external certifications template, and save the file on your computer.
4. The first row in the spreadsheet is the row that determines where your data belongs in the database. Enter the data in the spreadsheet.
5. After you have completed the required fields, save the file on your computer. You must save the file in the same CSV format as the sample template. A TXT or XLS format will not upload correctly to the system.
6. Go back to the Import External Certifications screen, and click **Browse** to find the file you just saved.
7. Click **Submit**.

Logistics

Use this Learning Configuration menu to manage the materials and resources for your organization's training requirements.

The following options are available from the Logistics menu:

- Buildings
- Equipment
- Rooms

Buildings Screen

Use the Buildings screen to review and update information about all of the buildings where classes are held.

Display the Buildings Screen

Follow these steps to display the Buildings Screen.

To display the Buildings screen:

1. Click ⚙ in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Buildings**.

Contents of the Buildings Screen

The Buildings screen displays the following columns and actions

Columns

Column	Description
Building Name	This is the name of the building (for example, Buenos Aires HQ). Click the name to see the View Building Details screen, which provides additional information about the building.
Building Contact	This is the name of the employee who is in charge of the building. This is the person who can help with scheduling and resource issues. Click the name to see the employee's Total Talent Profile, including contact information.
Building Location	This is a brief description of the building's location, such as the city and state. Click the location to see the Location Management screen, which provides the building's full address, phone number, time zone, and other information about the location.
Rooms	This is the number of rooms in the building that are available for classroom learning. You can schedule classes for these rooms. Click the number to see the Rooms screen, which provides more information about the rooms and the equipment in them and lets you manage room reservations.

Equipment	This is the number of pieces of equipment (laptops, whiteboards, and so on) in the room. Click the number to see the Equipment screen, which provides more information about the equipment, and lets you reserve pieces of equipment and add new pieces of equipment.
Actions	This column displays the actions that can be taken for each item in the table.

Actions

The buttons and icons on the Buildings screen perform the following functions.

Icon/Button	Action	Description
	Add Building	Click this button to display the Add Building screen, where you can add information about a new building.
	Edit	Click this icon to change information about the building.
	Delete	Click this icon to delete a building from Deltek Talent Learning. You can delete a building only if no rooms or equipment have been identified for the building.

Add a Building

Follow these steps to add a building.

To add a building:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Buildings**.
3. Click **Add Building**.
4. Enter a **Building Name**, and select a **Contact, Company,** and **Building Location.**
5. In the **Special Instructions** field, enter any information that would be helpful to people scheduling classes (for example, **Air conditioning is lowered after 18:00**).
6. Click **Save**.
7. Add equipment and rooms to the building:
   - See the “Equipment Screen” section for help entering equipment.
   - See the “Rooms Screen” section for help entering rooms.

Equipment Screen

Use the Equipment screen to see all of the learning-related equipment available in your organization's inventory.

You can see where each piece of inventory is located and reserve pieces that you need. You can also add pieces and delete pieces.

You can also generate an ICS file so that you can add the equipment reservation to your Outlook calendar.

Display the Equipment Screen

Follow these steps to display the Equipment Screen

To display the Equipment screen:

1. Click ⚙ in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Equipment**.

Contents of the Equipment Screen

The Equipment screen displays the following columns and acitons.

Columns

Column	Description
Name	This is the name of the piece of equipment (for example, Overhead Projector). Click the name to see the Equipment Profile screen, which provides additional information about the piece of equipment and shows any reservations that have been made for it.
Type	You can set up general categories of equipment, called types, that help you organize your inventory. For example, you might have a Monitors type for all of your computer monitors, or a Laptop Accessories type for all mice, webcams, and docking stations.
Serial Number	This is the serial number for the piece of equipment. The number is either the manufacturer's serial number or a number that is generated by Deltek Talent Learning.
Building	This is the name of the building in which the piece of equipment is located. Click the name to see the View Building Details screen, which provides additional information about the building.
Room	This is the name of the room in which the piece of equipment is located.

	Click the name to see the Rooms screen, which provides more information about the rooms and the equipment in it, and lets you manage room reservations.
Contact	This is the name of the employee who is in charge of the building. This is the person who can help with scheduling and resource issues. Click the name to see the employee's Total Talent Profile, including contact information.
Actions	This column displays the actions that can be taken for each item in the table.

Actions

The buttons and icons on the Equipment screen perform the following functions.

Icon/Button	Action	Description
	Add New Equipment	Click this button to display the Add New Equipment screen, where you can add information about a new piece of equipment.
	Add/Edit Equipment Type	Click this button to add a new category of equipment or edit an existing one.
	More Options » View All Rooms	Click this button to see all of the rooms available for classroom learning across your organization.
	Reserve	Click this button to reserve a piece of equipment for yourself or another employee.
	Edit	Click this icon to change information about a piece of equipment.
	Copy	Click this icon to duplicate an existing item (for example, when you get a second piece of equipment exactly the same as the first one). Enter the name and serial number of the new piece of equipment, and any other information that is different from the original.
	Delete	Click this icon to delete a piece of equipment from Deltek Talent Learning. You cannot delete a piece of equipment if anyone has reserved it for future use.

Add an Equipment Type

Assigning types to equipment is useful in organizing your inventory.

To add an equipment type:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Equipment**.
3. Click **Add/Edit Equipment Type**.
4. In the **Type** field, enter the name of the new type (for example, Laptop Accessories).
5. In the **Sort Order** field, enter a number that will determine where the type appears in the **Type** drop-down list on the Add New Equipment screen.

   For example, enter 1 if you want the new type to be the first type listed in the drop-down list.

   You cannot duplicate **Sort Order** numbers. If necessary, go to the list of types lower on the screen and edit their sort orders to accommodate the sort order of the new type.
6. Click **Save**.

Add New Equipment

You have two options for adding a new piece of equipment:

- If this is the first piece of equipment of its kind, enter it from scratch.
- If it is a duplicate of an existing piece of equipment, copy the original information as a starting point.

Add a New Piece of Equipment from Scratch

Follow these steps to add a new piece of equipment from scratch.

To add a new piece of equipment from scratch:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Equipment**.
3. Click **Add New Equipment**.
4. Enter the equipment **Name**, and select the **Type.**
5. In the **Serial Number** field, take one of the following actions:
   - Enter the manufacturer's serial number from the piece of equipment.
   - Click to have Deltek Talent Learning generate a unique, random serial number.
6. In the **Building** drop-down list, select the building in which the equipment is located.
7. For **Contact**, take one of the following actions:

- Click **Use Building Contact** to use the contact for the building where the equipment is located.
- Click **Select Contact** to search for and select a different contact.

8. Click **Save.**
9. Associate pieces of equipment with the rooms in which they are kept: See the “Rooms Screen” section for more information.

Add a New Piece of Equipment Based on an Existing Piece

Follow these steps to add a new piece of equipment based on an existing piece of equipment.

To add a new piece of equipment based on an existing piece of equipment:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Equipment**.
3. Click next to the piece of equipment that you want to copy.
4. Change any information that is different for the new piece of equipment.
5. Click **Save.**
6. Associate pieces of equipment with the rooms in which they are kept: See the “Rooms Screen” section for more information.

Reserve Equipment

The reservation process assumes that you can move a piece of equipment from room to room within a building.

To reserve a piece of equipment:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Equipment**.
3. Click next to the piece of equipment that you want to reserve.

   Use the calendar that displays to check the availability of the equipment.

   - Use the **<< Prev** and **Next >>** buttons to move among months.
   - Days that are shaded yellow have reservations.
   - Click a date to see any reservations for that day.
4. Click **Search for Employee** to find the employee for whom you are reserving the equipment. Enter all of part of the employee name or search by manager name.
5. Select the building in which the equipment is needed.
6. Select the room in which the equipment is needed.
7. Enter start and end dates for the period in which you need the equipment.

- If you only need the equipment for one day, enter the same date in the **Start Date** and **End Date** fields.
- If you need the equipment on the same day(s) each week, select the day(s) below.

8. Select the time of day when you need the equipment.
9. Click **Reserve**.

   The reservation displays on the calendar.
10. Click the **Outlook** option on the calendar reservation to generate an ICS file so that you can add the reservation to your Outlook calendar or send the reservation to another employee.

Rooms Screen

Use the Rooms screen to review and update information about all of the rooms where classes are held, reserve a room, add a room, and make a room unavailable for reservation.

You can also generate an ICS file so that you can add the equipment reservation to your Outlook calendar.

Display the Rooms Screen

Follow these steps to display the Rooms Screen.

To display the Rooms screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Rooms**.

Contents of the Rooms Screen

The Rooms screen displays the following columns actions.

Columns

Column	Description
Room	This is the name of the room. Click the name to see more information about the room and the equipment in it.
Number	This is the room number in the building (for example, 210 for room 210).
Capacity	This is the number of students that the room accommodates.
Room Contact	This is the name of the employee who is in charge of the room. This is the person who can help with scheduling and resource issues.

	Click the name to see the employee's Total Talent Profile, including contact information.
Building	This is the name of the building (for example, Buenos Aires HQ). Click the name to see the View Building Details screen, which provides additional information about the building.
Equipment	This is the number of pieces of equipment (laptops, whiteboards, and so on) in the room. Click the number to see the Equipment screen, which provides more information about the equipment, and lets you reserve pieces of equipment and add new pieces of equipment.
Actions	This column displays the actions that can be taken for each item in the table.

Actions

The buttons and icons on the Rooms screen perform the following functions.

Icon/Button	Action	Description
	Search	Enter all or part of a room name, and click **Search** to find a room.
	Add New Room	Click this button to display the Add New Room screen, where you can add information about a new room.
	Manage Reservations	Click this icon to reserve a room. You can also disable a room, meaning that it cannot be reserved.
	Edit	Click this icon to change information about the room.
	Delete	Click this icon to delete a building from Deltek Talent Learning. You can delete a room only if no reservations have been made for the room. If reservations exist, you can disable the room, but not delete it.

Add a Room

Follow these steps to add a room.

To add a room:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Rooms**.
3. Click **Add New Room**.

4. Enter the room **Name, Number**, and **Capacity**.
5. In the Building drop-down list, select the building in which the room is located.
6. For **Contact**, take one of the following actions:
    - Click **Use Building Contact** to use the contact for the building where the room is located.
    - Click **Select Contact** to search for and select a different contact.
7. Click **Add**.

Reserve a Room

Follow these steps to reserve a room.

To reserve a room:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Rooms**.
3. Click next to the room that you want to reserve.

    Use the calendar that displays to check the availability of the room.
    - Use the **<< Prev** and **Next >>** buttons to move among months.
    - Days that are shaded blue have reservations.
    - Click a date to see any reservations for that day.
4. Enter a name for the reservation (for example, Sundae Party).
5. Enter start and end dates for the period in which you need the room.
    - If you only need the room for one day, enter the same date in the **Start Date** and **End Date** fields.
    - If you need the room on the same day(s) each week, select the day(s) below.
6. Select the time of day when you need the equipment.
7. Enter a description for the reservation (for example, Sundae Party).
8. Click **Reserve**.

    The reservation displays on the calendar.
9. Click the Outlook option on the calendar reservation to generate an ICS file so that you can add the reservation to your Outlook calendar or send the reservation to another employee.

Make a Room Unavailable for Reservation

If a room will not be available for use for a long period of time, you can disable it, meaning that it can no longer be reserved. Existing reservations are not deleted.

To disable a room:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Rooms**.
3. Click next to the room that you want to disable.
4. In the **Disable Room** section, enter a reason for making the room unavailable.
5. Click **Disable**.
   The room remains on your list of rooms, but the icon displays in place of the icon.
6. To re-enable (release) the room, click .

Resource History Screen

Use the Resource History screen to review your employees' use of library resources. You can see each check-out transaction ever made.

Display the Resource History Screen

Follow these steps to display the Resource History Screen.

To display the Resource History screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Library Resources**.
3. **More Options** » **Resource History.**

Contents of the Resource History Screen

For each check-out transaction, the Resource History screen displays the following columns and actions.

Columns
You can sort the columns in ascending or descending order.

Column	Description
Name	This is the name of the resource, such as a book or video title.
Type	This is the medium used to deliver the resource (audio book, book, and so on).

Author	This is the author's name.
Checked Out To	This is the employee who borrowed the resource. You can sort this column according to Last Name.
Checked Out Date	This is the date that the administrator finalized the check-out of the resource.
Expiration Date	This is the date that the employee is expected to return the resource, calculated as the **Checked Out Date** + the **Checkout Interval** for the resource.
Returned Date	This is the actual date that the employee returned the resource.
Unique ID	This is the identification code for the specific copy of the resource that the employee borrowed. This field displays a blank value if no unique ID is specified for the library resource.
Tracking No.	This is the tracking number that the administrator assigned to the check-out transaction. This field displays an **N/A** value if no tracking number is supplied for the library resource.

Actions

The buttons on the Resource History screen perform the following functions.

Action	Description
View Requests and Checked Out Items	Click this button to see a list of all of the resources that are checked out or that have been requested by employees.
View All Resources	Click this button to display the Library Resources screen, where you can see and update the books and other materials available in your library of learning resources.
More Options » **Add Resource**	Click this button to display the Add/Edit Resource screen, where you can add information about a new resource or edit information about an existing one.
More Options » **Resource Types**	Click this button to review the resource types that are already set up and to add new ones. For example, you might want to add a resource type for podcasts.
More Options » **Presentation Methods**	Click this button to review the presentation methods that are already set up and to add new ones. For example, you might want to add a presentation method for virtual reality experiences.

Library

Use this Learning Configuration menu to manage the inventory of books and other reading materials for training.

The page displays a list of the materials currently available.

Manage and organize your library of books and other written training materials on this menu.

Library Resources Screen

Use the **Library Resources** screen to see and update your inventory of the books and other materials available in your library of learning resources.

Display the Library Resources Screen

Follow these steps to display the Library Resources Screen.

To display the Library Resources screen:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Library Resources**.

Contents of the Library Resources Screen

The Library Resources screen displays the following columns and actions.

Columns

Column	Description
Name	This is the name of the resource, such as a book or video title. Click the name to see additional information about the resource, including a description.
Type	This is the medium used to deliver the resource (audio book, book, and so on). Click the medium to see other resources of the same type. For example, click **DVD and Book Combo Set** to see all of the DVD and Book Combo Sets in the library.
Description	This is a description of the resource.
Author	This is the author's name. Click the name to see other resources with the same author.
Publisher/Year	This is the publisher and year of publication. Click the publisher to see other resources with the same publisher.
Copies	This is the number of copies of this resource in your library. Click the number to see information about each of the copies, including whether it is checked out.
Available	This is the number of copies of this resource that are not checked out.
Waiting	This is the number of people who are on the waiting list for this resource.

Actions	This column displays the actions that can be taken for each item in the table.

Actions

The buttons and icons on the Library Resource screen perform the following functions.

Icon/Button	Action	Description
	View Requests and Checked Out Items	Click this button to see a list of all of the resources that are checked out or that have been requested by employees.
	Add Resource	Click this button to display the Add/Edit Resource screen, where you can add information about a new resource or edit information about an existing one.
	More Options » Resource History	Click this button to review your employees' use of library resources. You can see each check-out transaction ever made.
	More Options » Resource Types	Click this button to review the resource types that are already set up and to add new ones. For example, you might want to add a resource type for podcasts.
	More Options » Presentation Methods	Click this button to review the presentation methods that are already set up and to add new ones. For example, you might want to add a presentation method for virtual reality experiences.
	**Edit**	Click this icon to change information about the resource.
	**Modify Inventory**	Click this icon to increase or decrease the number of copies of a resource in your library.
	**Delete**	Click this icon to delete a resource. You can delete a resource only if there is no inventory for the resource (for example, no copies of a book) and no one has reserved the resource.

Filter the Library Resources Shown

Click **Filter** to search for resources based on search criteria.

Supply one or more search values, and then click **Search**.

Search Criteria

Field	Description
Resource Name	Enter all or part of the resource name.
Description	Enter keywords that might appear in the resource description.
Author	Enter all or part of the author's name.
Co-Author	Enter all or part of the co-author's name.
ISBN	Enter all of part of a book's ISBN (International Standards Book Number). Each edition and publication type (e-book, paperback, hardcover, and so on) has a unique ISBN.
Publisher (Publication Year)	Enter all or part of the publisher's name and/or enter the year of publication.
Resource Type	Select the medium used to deliver the resource (audio book, book, and so on).
Presentation Method	Select the mode of delivery (instructor led, self-paced, and so on).
Competency	Select the competency (communication skills, adaptability, and so on) that an employee should expect to gain from using this resource.

Add Resources

See the "Add/Edit Resource Screen" section for help entering new resources.

Add a Resource Type

When you add a new resource type, it appears in Resource Type drop-down lists throughout the Library Resources module.

To add a resource type:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Library Resources**.
3. Click **More Options** » **Resource Types**.
4. Enter a name for the resource type.
5. Click **Save**.

Add a Presentation Method

When you add a new presentation method, it appears in Presentation Method drop-down lists throughout the Library Resources module.

To add a presentation method:

1. Click ⚙ in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Library Resources**.
3. Click **More Options** » **Presentation Methods**.
4. Enter a name for the presentation method and a description of it. For example, add a new method called Podcast with the description **Audio file for download to a media player**.
5. Click **Save**.

Change the Number of Copies of a Resource

If you add or lose copies of a resource, you can update the number of tracked copies.

To change the inventory number of a resource:

1. Click ⚙ in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Library Resources**.
3. Find the resource.
4. Click ➕ next to the resource.
5. Add or delete copies:
   - To add a single copy, enter a new **Unique ID**, and click **Save**.
   - To add multiple copies:
6. Enter the number of copies in the **Number of inventory items (if more than one)** field
7. Click **Add More Items**.
   The screen displays a separate field for each copy.
   - If you want to apply a prefix to all of the ID numbers, select the **Automatically number items starting with** option. Then enter the prefix in the field below. For example, if you want all Customer Service resources to be easy to find, enter **CUST** as a prefix.
8. Enter a **Unique ID** for each copy.
   - To delete copies:
9. Select the check box next to the copies that you want to delete, or select the check box at the top of the list to delete all copies.
10. Click **Delete Selected Items**.

Review Resource History

See the "Resource History Screen" section for help entering new resources.

Add/Edit Resource Screen

Use the **Add/Edit Resource** screen to add or modify information about the books and other materials available in your library of learning resources.

Display the Add/Edit Resource Screen

Follow these steps to display the Add/Edit Resource Screen.

To display the Add/Edit Resource screen:

1. Click ⚙ in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Library Resources**.
3. Click **Add Resource**.

Contents of the Add/Edit Resource Screen

The Add/Edit Resource screen displays the following fields.

Contents

Field	Description
Name	Enter the name of the resource, such as the book or video title.
Type	Select the medium used to deliver the resource (audio book, book, and so on). If you need to add a new resource type, see the "Add a Resource Type" section for help.
Description	Enter a description of the contents of the resource.
Author	Enter the author's name.
Co-Author	Enter the co-author's name, if any.
Publisher	Enter the publisher's name.
Publication Year	Enter the year of publication.

Field	Description
ISBN	Enter the book's ISBN (International Standards Book Number). Each edition and publication type (e-book, paperback, hardcover, and so on) has a unique ISBN.
Copies	Enter the number of copies of this resource in your library.
Checkout Interval (days)	Enter the number of days that an employee can check out and keep the resource.
Allow Waiting List	Select this option if you want to maintain a waiting list for this resource. If an employee requests the resource, but there are no copies available, the employee's name will be placed automatically on the waiting list.
Scan No.	If your organization has a scanning inventory system, enter the scan number.
Presentation Method	Select the mode of delivery (instructor led, self-paced, and so on).
Competency Categories	Select the competencies (communication skills, adaptability, and so on) that an employee should expect to gain from using this resource. Generally, a core competency is an ability that everyone in an organization is expected to have and on which they are rated. A job competency is relevant to a specific job title or role. 1. Select **Core Competencies** or **Job Competencies** from the drop-down list. 2. Select the individual skills or competencies for either or both of the categories. ▪ To select or clear individual items, click the items and use the single left or right arrow to move them. ▪ To select or clear all of the items in a category, click any item and use the double left or double right arrows to move all items.

Add a Resource

Follow these steps to add a resource.

To add a resource to the resource library:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Library Resources**.
3. Click **Add Resource**.

4. Enter information on the Add/Edit Resource screen.
5. Click **Submit**.
6. On the Inventory screen, enter a unique ID number for each of the copies of the resource in your library.
   - The screen displays a separate field for each copy, based on the number of copies that you entered on the Add/Edit Resource screen.
   - If you want to apply a prefix to all of the ID numbers, select the **Automatically number items starting with** option. Then enter the prefix in the field below. For example, if you want all Customer Service resources to be easy to find, enter **CUST** as a prefix.
   - Click **Save**.

Requested/Checked Out Items Screen

Use the Requested/Checked Out Items screen to review employee requests for resources and to manage the check-out and check-in process.

The screen displays all of the resources that an employee has either requested or checked out.

When an employee requests a resource, the Administrator:

1. Reviews the request.
2. Gives the resource to the employee, either in person, by mail, or via another delivery method.
3. “Finalizes” check-out, assigning a tracking number to the check-out transaction and noting the date that the resource was given to the employee.

When an employee returns the resource, the Administrator:

1. Receives the item from the employee, either in person, by mail, or via another delivery method.
2. Marks it as checked in and available to other employees.

Display the Requested/Checked Out Items Screen

Follow these steps to display the Requested/Checked Out Items Screen.

To display the Requested/Checked Out Items screen:

1. Click ⚙ in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Library Resources**.
3. Click **View Requests & Checked Out Items**.

Contents of the Requested/Checked Out Items Screen

The Requested/Checked Out Items screen displays the following columns and actions.

Columns

Column	Description
Name	This is the name of the resource, such as a book or video title. Click the name to see additional information about the resource, including a description.
Type	This is the medium used to deliver the resource (audio book, book, and so on). Click the medium to see other resources of the same type. For example, click **DVD and Book Combo Set** to see all of the DVD and Book Combo Sets in the library.
Author	This is the author's name. Click the name to see other resources with the same author.
Checked Out Date	This is the date that the administrator finalized the check-out of the resource.
Sent/Picked Up	This is the date that the resource was given to the employee.
Expiration Date	This is the date that the employee is expected to return the resource, calculated as the **Checked Out Date** + the **Checkout Interval** for the resource.
Unique ID	This is the identification code for the specific copy of the resource that the employee borrowed.
Tracking Number	This is the tracking number that the administrator assigned to the check-out transaction.

Actions

The buttons and icons on the Requested/Checked Out Items screen perform the following functions.

Icon/Button	Action	Description
	View All Resources	Click this button to display the Library Resources screen, where you can see and update the books and other materials available in your library of learning resources.
	Add Resource	Click this button to display the Add/Edit Resource screen, where you can add information about a new resource or edit information about an existing one.

	More Options » Resource History	Click this button to review your employees' use of library resources. You can see each check-out transaction ever made.
	More Options » Resource Types	Click this button to review the resource types that are already set up and to add new ones. For example, you might want to add a resource type for podcasts.
	More Options » Presentation Methods	Click this button to review the presentation methods that are already set up and to add new ones. For example, you might want to add a presentation method for virtual reality experiences.
	Finalize Check-Out	Click this icon to release a resource to the employee who requested it. Assign a tracking number to the check-out transaction and note when the resource was given to the employee.
	Make Available for Check-Out	Click this icon to record that a resource has been returned and is now checked-in and available in the library.
	Modify Inventory	Click this icon to increase or decrease the number of copies of a resource in your library.

Check Out a Resource and Give It to an Employee

Follow these steps to check out a resource and give it to an employee.

To check out a resource:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Library Resources**.
3. Click **View Requests & Checked Out Items**.
4. Review the requests, one by one.
5. If a resource is available, arrange to give it to the employee.
6. Click to finalize the check-out.

   On the Finalize Check-Out screen, you can see all of the outstanding requests from this employee. If the employee has multiple outstanding requests, it makes sense to finalize them all at once and give all of the items to the employee at one time.
7. Select the requests that you want to finalize.
8. Enter a tracking number for the check-out transaction. A simple, sequential numbering system works well.
9. Select the date that the resource(s) were sent to the employee or picked up by the employee.

10. Click **Finalize Selected Items**.

Check In a Resource Returned by an Employee

Follow these steps to check in a resource returned by an employee.

To check in a resource:

1. Click in the toolbar to display the Administration menu.
2. In the **Learning** section, click **Library Resources**.
3. Click **View Requests & Checked Out Items**.
4. On the Requested/Checked Out Items screen, find the resource(s) that the employee is returning and select them.
5. Click **Return All Resources**.

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