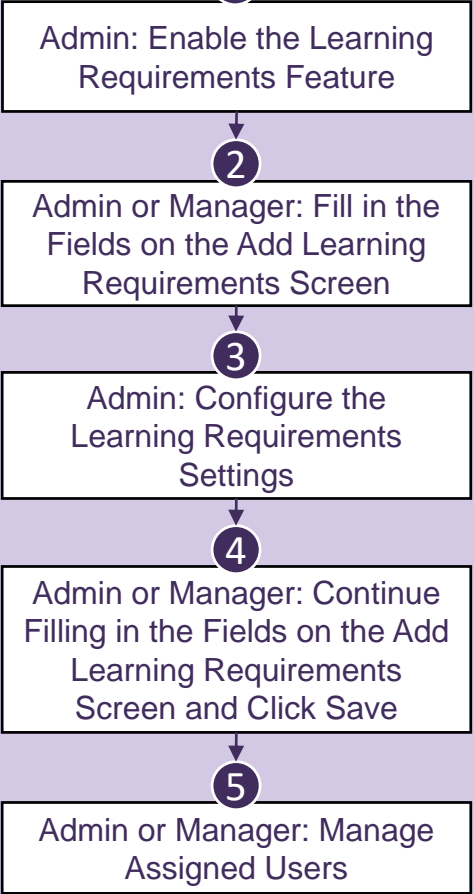


Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager



☰

Deltak Talent Management

Application Development Testing Company

English

📅

📄

?

⚙️

👤

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Employees

Main

Alerts

Navigation

Cont

Kathryn Admin

12-Apr-2018

12:14a

Begin

Rene Admin

18-Apr-2018

None

+

Epe to Admin

None

None

+

Best viewed in IE or Adobe PDF Reader.

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager

1

Admin: Enable the Learning Requirements Feature

2

Admin or Manager: Fill in the Fields on the Add Learning Requirements Screen

3

Admin: Configure the Learning Requirements Settings

4

Admin or Manager: Continue Filling in the Fields on the Add Learning Requirements Screen and Click Save

5

Admin or Manager: Manage Assigned Users

☰

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Dashboard

MY EMPLOYEES

RECRUITING

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CAREER CENTER

REPORTS

Employees

Main D

Alerts

Continuous Feedback

Kathryn Admin

Reine Admin

Epe to Administrator

13

Project Metrics Test

18 Apr 2018

None

None

Continue

For Managers and Learning Managers, click here to skip to Step 2

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager

- 1
Admin: Enable the Learning Requirements Feature
- 2
Admin or Manager: Fill in the Fields on the Add Learning Requirements Screen
- 3
Admin: Configure the Learning Requirements Settings
- 4
Admin or Manager: Continue Filling in the Fields on the Add Learning Requirements Screen and Click Save
- 5
Admin or Manager: Manage Assigned Users

Deltek Talent Management

Application Development Testing Company English

Dashboard

MY EMPLOYEES

RECRUITING

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LEARNING

SUCCESSION

CAREER CENTER

REPORTS

Employees Search...

Administration / Global Settings / System Administration / Features

Features

Groups

SELECT A GROUP *
Learning Manager

☒ Core

☒ Tasks
This feature allows users to create and modify tasks and assign given tasks to specific stakeholders.

☒ Recruiting

☒ Performance

☒ Development

☒ Learning

☒ Learning Requirements
Allows the user to access the learning requirements page. NOTE: This feature requires the Hua Core Tasks to be enabled to work

☐ CoreHR

FILTER task

FILTER requirement

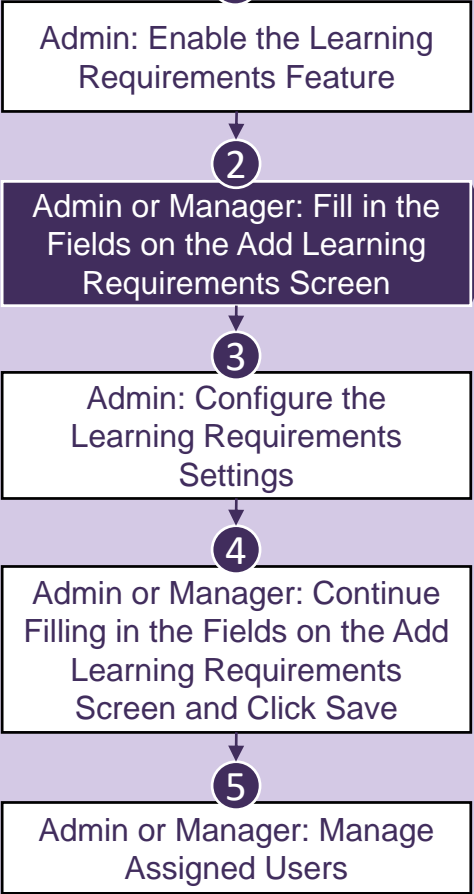
Continue

A
Click Administration > Global Settings > System Administration > Features.

B
Make sure that **Tasks** is enabled for all the groups to whom you want to have tasks issued.

C
Make sure that **Learning Requirements** is enabled only for specific groups who should have the ability to issue Learning Requirements.

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager



☰

Deltek Talent Management

Application Development Testing Company

English

Dashboard

MY EMPLOYEES

RECRUITING

PERFORMANCE

LEARNING

My Learning

Courses & Class

Curricula

Learning Requirements

SUCCESSION

CAREER CENTER

REPORTS

Learning

Employees

Search...

Q

Manage Learning Requirements

Add New Learning Requirement

Filter

No Learning Requirements to Display

A

Click Add New Learning Requirement

B

Click Learning.

C

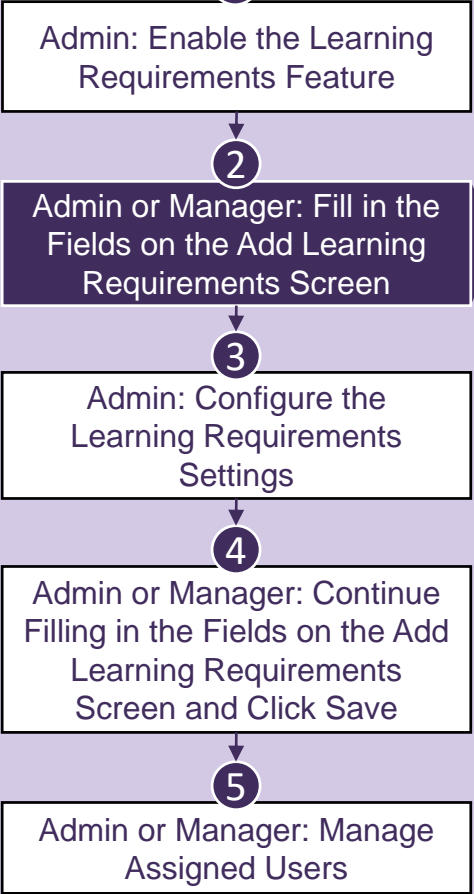
Click Learning Requirements

Continue

v16.0-rc.8

Last sync:

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager



Deltek Talent Management

Application Development Testing Company English

Employees Search...

View All Learning Requirements

EFFECTIVE DATE *

EXPIRATION DATE

RECURRENCE FREQUENCY ⓘ

None

None

Annual

Semi-Annual

Monthly

TASK DUE DATE ⓘ * †

OBJECTIVE TYPE *

Course

COURSE * †

Select a Course

TYPE

Ad-Hoc

Continue

Save Cancel

v16.1.0

Last sync:

D

Select the date when the requirement becomes effective as a policy.

E

If applicable, select the date when the requirement will no longer be in effect as a policy.

F

Set how frequently the assigned users will need to complete the course or class. Setting this to **None** means there is only one instance of the task for the assigned user to complete.

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager

- 1
Admin: Enable the Learning Requirements Feature
- 2
Admin or Manager: Fill in the Fields on the Add Learning Requirements Screen
- 3
Admin: Configure the Learning Requirements Settings
- 4
Admin or Manager: Continue Filling in the Fields on the Add Learning Requirements Screen and Click Save
- 5
Admin or Manager: Manage Assigned Users

Deltek Talent Management

Application Development Testing Company English

Employees Search...

View All Learning Requirements

EFFECTIVE DATE *
7/27/2019

EXPIRATION DATE

RECURRENT FREQUENCY ⓘ G
Monthly

RECURRENT MULTIPLIER ⓘ + H
1

MAXIMUM NUMBER OF OCCURRENCES ⓘ + I
6

TASK BASE D
None

TASK DUE DA

OBJECTIVE TYPE *
Course

COURSE * +
Select a Course
AG - Course A

TYPE

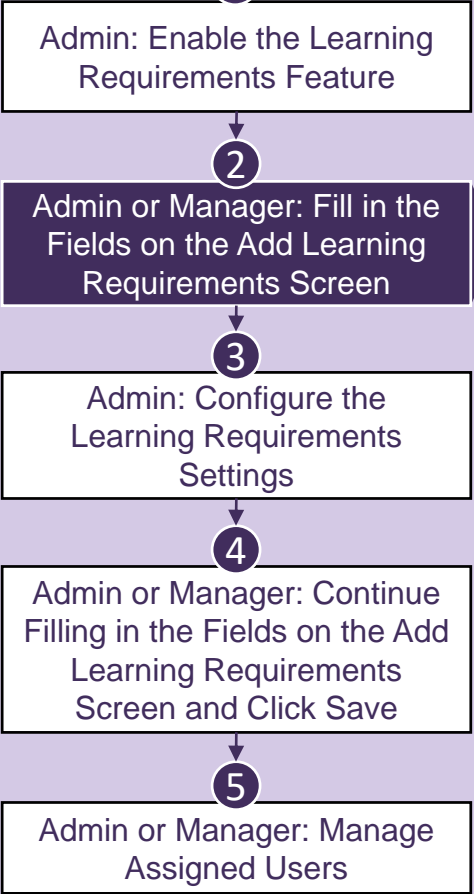
Continue

Setting the **Recurrence Frequency** to anything other than **None** displays these additional multiplier fields.

In this field, set how often you want the requirement to generate a task for the assigned user. For example, if you enter **1** in the **Recurrence Multiplier** field, and the **Frequency** is **Monthly**, then the application automatically generates a task every month.

In this field, set how many times you want the requirement to generate a task for the assigned user. Any cancelled task is disregarded. This means the application will continue to generate a task every month until the assigned user completes the **Maximum Number of Occurrences** that you've set.

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager



Deltek Talent Management

Welcome Admin HRsmart Last Login: 7/28/2019, 0:47 (SAST)

Employees

Search...

Add Learning Requirements

View All Learning Requirements

EFFECTIVE DATE *

7/27/2019

EXPIRATION DATE

RECURRENCE FREQUENCY ⓘ

Monthly

RECURRENCE MULTIPLIER ⓘ * †

1

MAXIMUM NUMBER OF OCCURRENCES ⓘ * †

6

TASK BASE DUE DATE ⓘ

None

None

Position Start

Hire Date

OBJECTIVE TYPE *

Course

COURSE * †

Select a Course

This field determines the due date of the requirement. If applicable, select the milestone event from which the Due Date will be calculated for tasks issued to the user.

If you set the **Task Base Due Date** to **None**, then you will have to manually select a date in the **Due Date** field

Continue

```
graph TD; 1[Admin: Enable the Learning Requirements Feature] --> 2[Admin or Manager: Fill in the Fields on the Add Learning Requirements Screen]; 2 --> 3[Admin: Configure the Learning Requirements Settings]; 3 --> 4[Admin or Manager: Continue Filling in the Fields on the Add Learning Requirements Screen and Click Save]; 4 --> 5[Admin or Manager: Manage Assigned Users];
```

- Admin: Enable the Learning Requirements Feature
- Admin or Manager: Fill in the Fields on the Add Learning Requirements Screen
- Admin: Configure the Learning Requirements Settings
- Admin or Manager: Continue Filling in the Fields on the Add Learning Requirements Screen and Click Save
- Admin or Manager: Manage Assigned Users

The screenshot shows the 'Task Settings' form with the following fields and values:

- MAXIMUM NUMBER OF OCCURRENCES**: 6
- TASK BASE DUE DATE**: Position Start
- TASK CREATION OFFSET DAYS**: 28
- TASK DEADLINE OFFSET DAYS**: 0

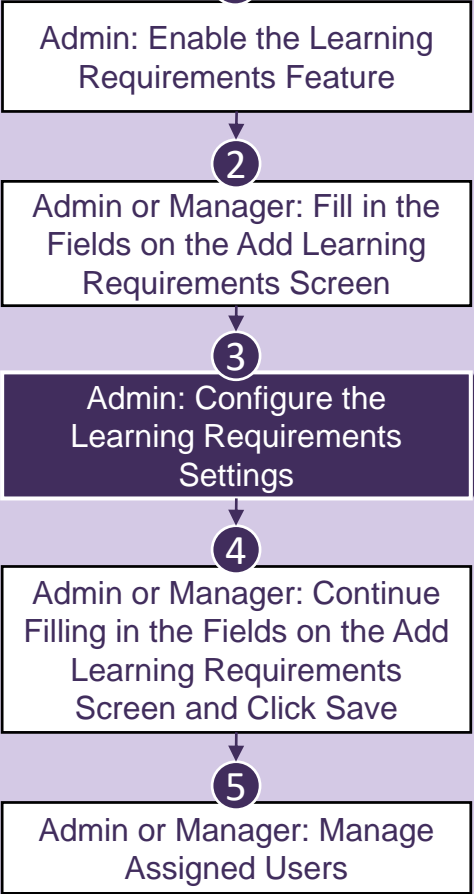
Callouts provide additional information:

- Callout K**: If you set the **Task Base Due Date** to **Position Start**, then the application will automatically calculate the **Due Date** based on the position start date of the assigned user.
- Callout L**: The default values in these fields are based on your administrator's configuration settings in [Step 3](#) of this guide. You can change the default values, but note that doing so recalculates the dates for all assigned users who have not yet completed the task.

Navigation instructions at the bottom:

- For Admins**, click [here](#) to continue to Step 3 and configure the settings
- For Managers and Learning Managers**, click [here](#) to skip to Step 4

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager



Deltek Talent Management

Application Development Testing Company

English

Employees

Search...

Administration / Global Settings / System Administration / System Settings

System Settings

⚠ WARNING: System Settings are restricted to authorized users. Changing system settings may impact site functionality. Proceed with caution. For questions about a system setting and its impact, please reach out to Deltek Customer Care Support at support.deltek.com.

➤ Appraisal

➤ Candidates

➤ Certifications

➤ Classes

➤ Data Privacy Settings

➤ Development Plan

➤ Employee Referral System

➤ General

➤ Integrations

➤ Interview

➤ Job Seeker

➤ Jobs

➤ Learning Requirements

➤ Notifications

➤ Offers

A

Click Administration > Global Settings > System Administration > System Settings.

B

Click Learning Requirements.

Continue

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager

1
Admin: Enable the Learning Requirements Feature

2
Admin or Manager: Fill in the Fields on the Add Learning Requirements Screen

3
Admin: Configure the Learning Requirements Settings

4
Admin or Manager: Continue Filling in the Fields on the Add Learning Requirements Screen and Click Save

5
Admin or Manager: Manage Assigned Users

General

Integrations

Interview

Job Seeker

Jobs

Learning Requirements

IMPLEMENTATION ONLY	SETTING NAME	DESCRIPTION & OPTIONS	SETTING VALUE OPTIONS
N/A	Learning Requirements Default Task Creation Offset Days	The number of days prior to the due date of a task to be created from a Learning Requirement, indicating when the Learning Requirement should issue a task to a matched user.	28
N/A	Learning Requirements Default Task Deadline Offset Days	For Learning Requirements, this is the number of days added to a dynamic user-related date to arrive at the task's actual due date.	0

Notifications

Offers

Onboarding

Outlook Sync Utility

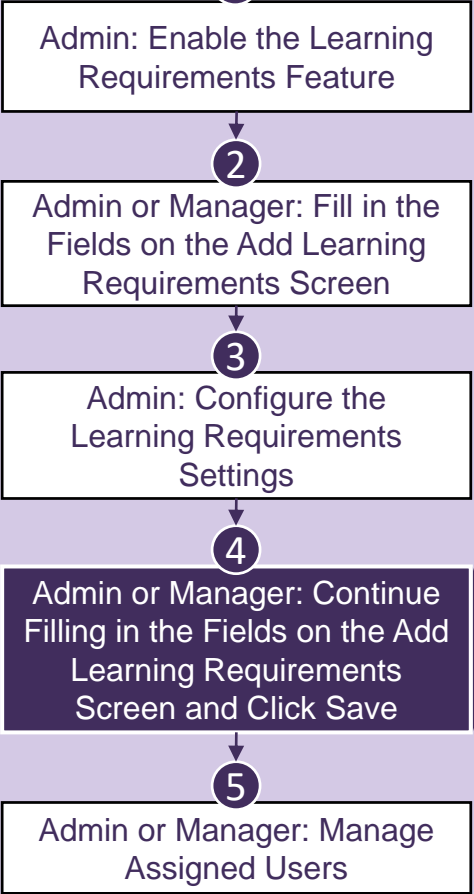
Requisitions

Continue

C
Set a higher or lower value if necessary. You can change this anytime, depending on your company's needs.

D
Set a higher or lower value if necessary. You can change this anytime, depending on your company's needs.

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager



Welcome Admin HRsmart Last Login: 7/28/2019, 0:47 (SAST) ✕

RECCURENCE FREQUENCY ⓘ
Monthly ▼

RECCURENCE MULTIPLIER ⓘ * †
1

MAXIMUM NUMBER OF OCCURRENCES ⓘ * †
6

TASK BASE DUE DATE ⓘ
Position Start ▼

TASK CREATION OFFSET DAYS ⓘ * †
28

TASK DEADLINE OFFSET DAYS ⓘ * †
0

OBJECTIVE TYPE *
Course ▼
Course
Curriculum
🔍 Select a Course

TYPE
Ad-Hoc

Save Cancel

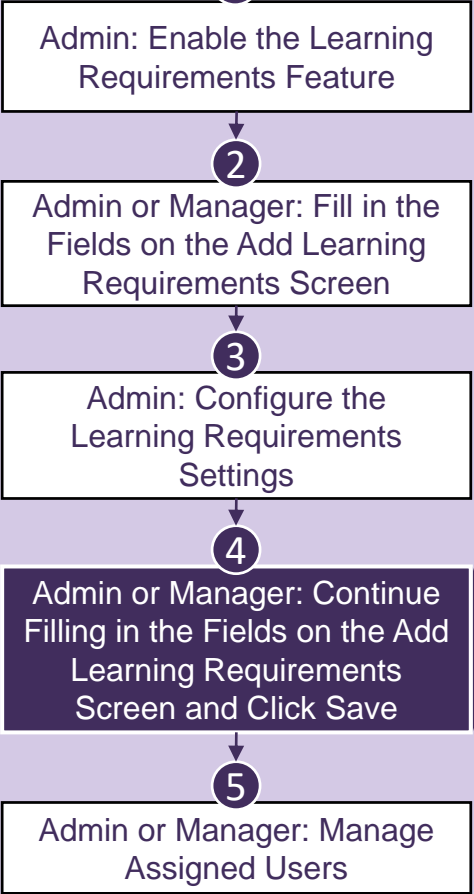
Continue

v16.1.0
Last sync:

A

Select whether the requirement is a **Course** or a **Curriculum**.

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager



WELCOME ADMIN HRSMART LAST LOGIN: 7/28/2019, 0:47 (SAST)

RECCURENCE FREQUENCY ⓘ
Monthly

RECCURENCE MULTIPLE
1

MAXIMUM NUMBER OF
6

TASK BASE DUE DATE ⓘ
Position Start

TASK CREATION OFFSET
28

TASK DEADLINE OFFSET
0

OBJECTIVE TYPE *
Course

COURSE * †
Select a Course

TYPE
Ad-Hoc

Save Cancel

Select a Course

Search for Courses

SEARCH

COURSE MAY BE RETAKEN
☒ Both ☐ No ☐ Yes

Search

Current Selection
No Courses Selected

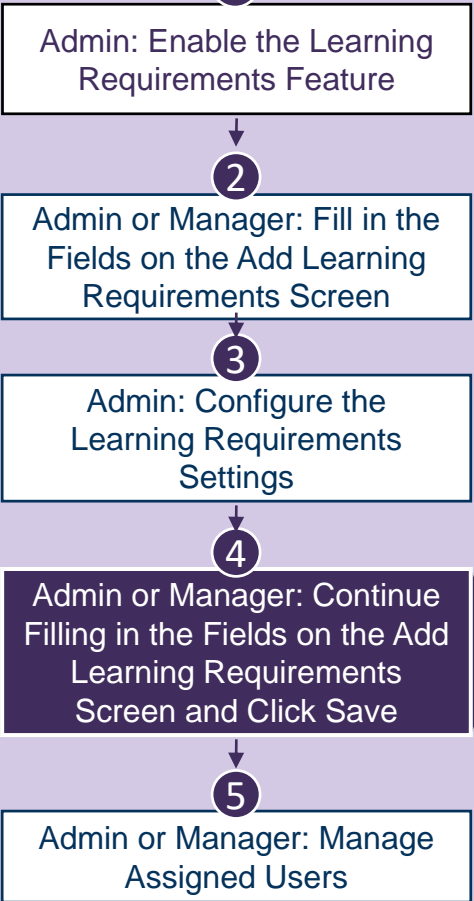
Confirm Selection

Close Window

Continue

v16.1.0
Last sync:

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager



Welcome Admin HRsmart Last Login: 7/28/2019, 0:47 (SAST)

EXPIRATION DATE

RECURRANCE FREQUENCY ⓘ

Monthly

RECURRANCE MULTIPLIER ⓘ * †

1

MAXIMUM NUMBER OF OCCURRENCES ⓘ * †

6

TASK BASE DUE DATE ⓘ

Position Start

TASK CREATION OFFSET DAYS ⓘ * †

28

TASK DEADLINE OFFSET DAYS ⓘ * †

0

OBJECTIVE TYPE *

Curriculum

CURRICULUM * †

-- Select --

TYPE

Ad-Hoc

-- Select --

01 - Certificate Renewal (Long Title Test. Long Title Test. Long Title Test.)

1 PA - Curriculum (Default)

1 PA - Curriculum (Does not require manager's approval)

1 PA - Curriculum (New Hire)

1 PA - Curriculum (New Hire2)

__ TEST

AB - Healthcare Curriculum

AB - Pharmacology Curriculum

AG - Curriculum A

AG - Curriculum B

AG - Curriculum C

AG - Curriculum D

AG - Curriculum E

AG - Curriculum F

AG - Curriculum G

AG - Curriculum H

AG - Curriculum I

AG - Curriculum J

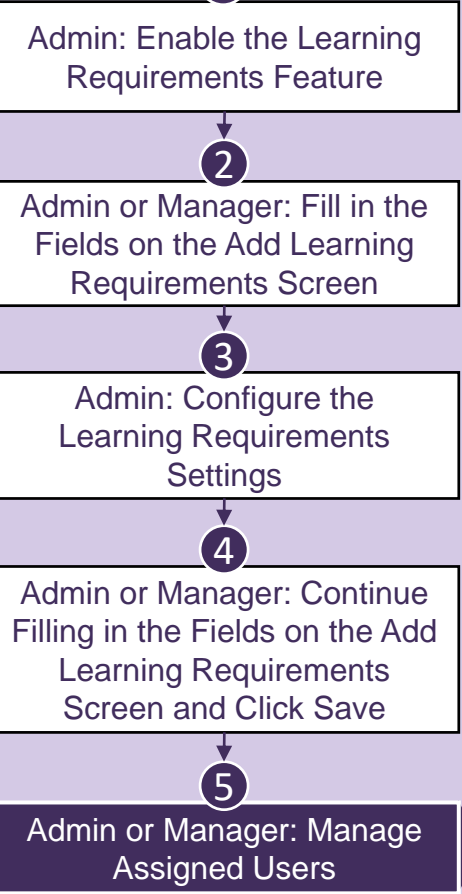
AG - Curriculum K

-- Select --

Continue

If you selected **Curriculum**, then choose the curriculum name from the drop-down list.

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager



Dashboard

MY EMPLOYEES

RECRUITING

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My Learning

Courses & Classes

Curricula

Learning Requirements

SUCCESSION

CAREER CENTER

REPORTS

Deltek Talent Management

Application Development Testing Company English

0

Learning

Employees

Search...

Manage Learning Requirements

Add New Learning Requirement

Filter

»

Displaying 1 - 3 of 3

10

25

50

100

per page

NAME	OBJECTIVE TYPE	EFFECTIVE DATE	EXPIRATION DATE	CREATED BY	ACTIONS
AG - Course B	Course	7/29/2019	N/A	Admin HRsmart	
AG - Course B	Curriculum	7/29/2019	1/1/2021	Admin HRsmart	
AG - Course B	Course	7/29/2019	1/1/2035	Admin HRsmart	

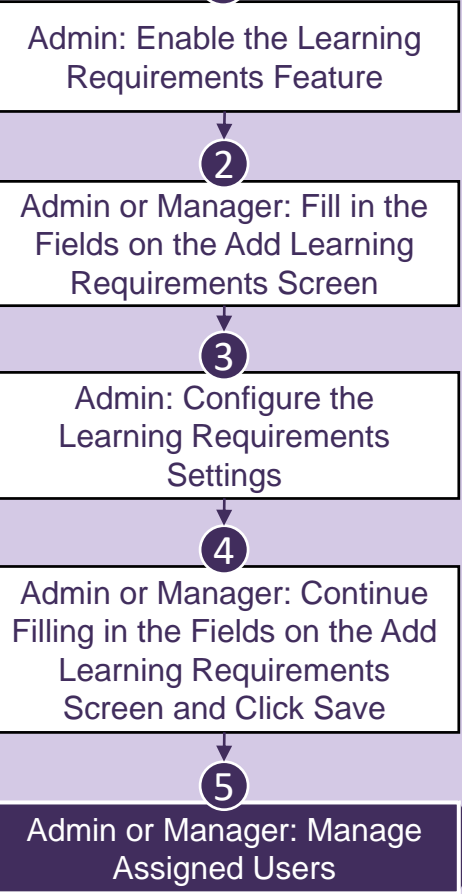
v16.1.0
Last sync:

Click Learning.

Click Learning Requirements

Continue

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager



Deltek Talent Management

Application Development Testing Company

English

← Main Menu

LEARNING

My Learning >

Courses & Classes >

Curricula >

Learning Requirements

Learning

Employees

Search...

🔍

🔄

📌

Manage Learning Requirements

Add New Learning Requirement

Filter

« < 1 > »

Displaying 1 - 3 of 3

10 25 50 100

per page

OBJECTIVE NAME ▾	OBJECTIVE TYPE ▾	EFFECTIVE DATE ▾	EXPIRATION DATE ▾	CREATED BY ▾	ACTIONS
AG - Course B	Course	7/29/2019	N/A	Admin HRsmart	<div><div>👁</div><div>⋮</div></div> <div><div>Edit</div><div>👤+ Assign Learning Requirement Users</div><div>🚫 Cancel</div></div>
AG - Curriculum K	Curriculum	7/29/2019	1/1/2021		
AG - Course B	Course	7/29/2019	1/1/2035		

C

Assign Users: Locate the **Objective Name** in the table, then click **Assign Learning Requirement Users** from the **Actions** column.

Continue

https://docenhancement.awsqa.hua.hrsmart.com/hr/lms/LearningRequirements/index#

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager

- 1
Admin: Enable the Learning Requirements Feature
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Admin or Manager: Fill in the Fields on the Add Learning Requirements Screen
- 3
Admin: Configure the Learning Requirements Settings
- 4
Admin or Manager: Continue Filling in the Fields on the Add Learning Requirements Screen and Click Save
- 5
Admin or Manager: Manage Assigned Users

Deltek Talent Management

Application Development Testing Company

English

Employees

Search...

Assign Learning Requirement Users:

AG - Course B

ASSIGNED TO

Select Learning Requirement User

Filter

No Learning Requirement Users to Display

Select Learning Requirement User

☐

Christa Admin

☐

Dima Admin

DM - General System Administrator (DM - GSA)

DM - ITADM DM - Administration

DM - Scranton

☐

Edgar Admin

Administration

☐

Ferdinand Admin

☒

Hiba Admin

☒

Jamalca Admin

Admin and HR

<

>

1

2

3

4

5

...

>

Displaying 1 - 25 of 1029

10

25

50

100

 per page

Add All Selected

Current Selection

NAME	ACTIONS
Rosa 500	<div>✕</div>
Hiba Admin	<div>✕</div>
Jamalca Admin	<div>✕</div>

Clear

Confirm Selection

Close Window

Continue

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager

- 1
Admin: Enable the Learning Requirements Feature
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Admin or Manager: Fill in the Fields on the Add Learning Requirements Screen
- 3
Admin: Configure the Learning Requirements Settings
- 4
Admin or Manager: Continue Filling in the Fields on the Add Learning Requirements Screen and Click Save
- 5
Admin or Manager: Manage Assigned Users

Deltek Talent Management

Application Development Testing Company English

Employees

Search...

Assign Learning Requirement Users:

View All Learning Requirements

Add New Learning Requirement

More Options

AG - Course B

ASSIGNED TO

Select Learning Requirement User

Save

Cancel

Filter

« < 1 > »

Displaying 1 - 3 of 3

10 25 50 100 per page

NAME	ACTIONS
Hiba Admin	<div>E</div> <div>X</div>
Jamaica Admin	<div>X</div>
Rosa 360	<div>X</div>

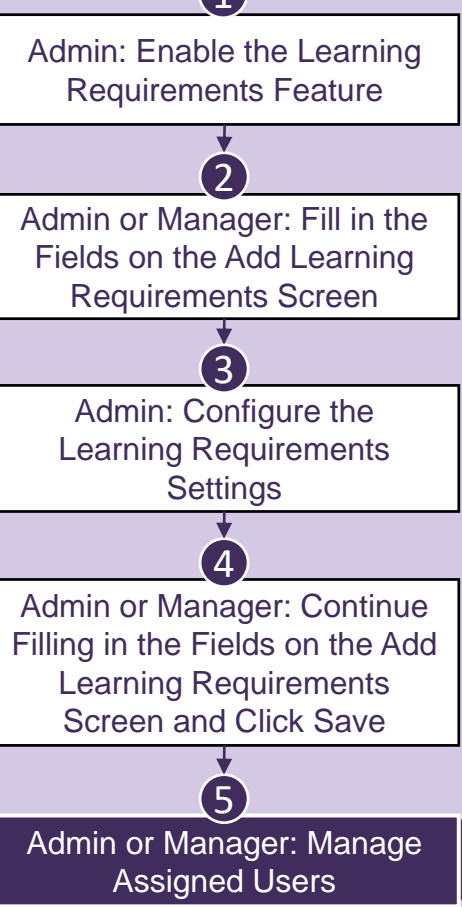
v16.1.0

Last sync:

Continue

Remove assigned users if necessary. Click X to remove assigned users from the list.

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager



Deltek Talent Management

Application Development Testing Company English

Learning

Employees

Search...

Administration / Global Settings / System Administration / Features

Manage Learning Requirements

Add New Learning Requirement

Filter

« < 1 > »

Displaying 1 - 3 of 310 25 50 100 per page

OBJECTIVE NAME	OBJECTIVE TYPE	EFFECTIVE DATE	EXPIRATION DATE	CREATED BY	ACTIONS
AG - Course B	Course	7/29/2019	N/A	Admin HRsmart	<div><div>Edit</div><div>Process</div><div>Assign Learning Requirement Users</div><div>Cancel</div></div>
AG - Curriculum K	Curriculum	7/29/2019	1/1/2021		
AG - Course B	Course				

Processing...

Process the Learning Requirement. The application automatically processes Learning Requirements and generates tasks for assigned users. This process occurs in the background on an hourly basis. However, you can manually trigger the process to immediately generate tasks.

Continue

v16.1.0
Last sync:

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager

1
Admin: Enable the Learning Requirements Feature

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Admin or Manager: Fill in the Fields on the Add Learning Requirements Screen

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Admin or Manager: Continue Filling in the Fields on the Add Learning Requirements Screen and Click Save

5
Admin or Manager: Manage Assigned Users

Deltek Talent Management

Dashboard

MY EMPLOYEES

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Employees Search...

Main Dashboard

Alerts

- New Tuition Assistance Requests (10)
- Score this Appraisal - Appraisal (Mars WF Easy LALA) Mars Admin

Show All

Get More Widgets Tasks

Deltek Talent Management

Application Development Testing Company English

Employees Search...

My Tasks

Add Task

Filter

STATUS

- Incomplete
- Canceled
- Completed

CATEGORY

- Personal

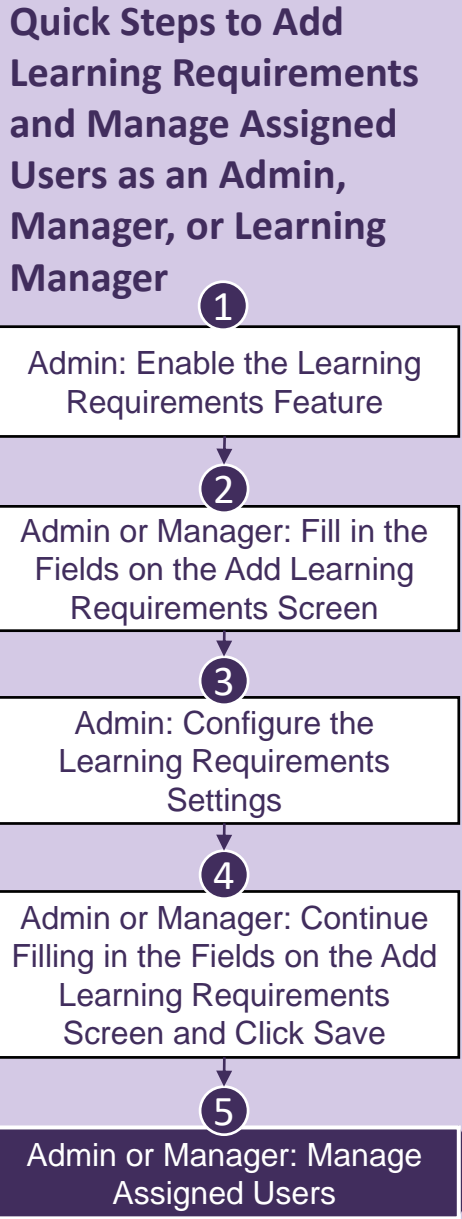
CLEAR FILTER

- Click Here

Displaying 1 - 3 of 3 10 25 50 100 per page

DESCRIPTION	REQUIRED	CATEGORY	DUE DATE	DATE CREATED	ROLE	PRINCIPAL(S)	ASSIGNEE(S)	STATUS	ACTIONS
Hello there	Yes	Personal	6/23/2019	6/19/2019	Principal	Admin HRsmart	Sammie Spam Epepito Administrator Kathryn Admin	Incomplete	
This is a test task	Yes	Personal	6/21/2019	6/17/2019	Principal	Admin HRsmart	Epepito Administrator	Canceled	
This is a test task	Yes	Personal	6/21/2019	6/17/2019	Principal	Admin HRsmart Rosa 360	Rose 360	Incomplete	

Continue



Deltek Talent Management

Application Development Testing Company English

Learning

Employees

Search...

Manage Learning Requirements

Add New Learning Requirement

Filter

<<

<

1

>

>>

Displaying 1 - 5 of 5

10

25

50

100

per page

OBJECTIVE NAME	OBJECTIVE TYPE	EFFECTIVE DATE	EXPIRATION DATE	CREATED BY	ACTIONS
AG - Course B	Course	7/29/2019	N/A	Admin HRsmart	<div></div> <div></div>
AG - Curriculum K	Curriculum	7/29/2019	1/1/2021	Admin HRsmart	<div></div> <div></div>
AG - Course B	Course				<div></div> <div></div>
AG - Course B	Course				<div></div> <div></div>
PBA - Read and Sign Course_Retakeable_NonPermanent	Course	7/30/2019	8/11/2022	Admin HRsmart	<div></div> <div></div>

Continue

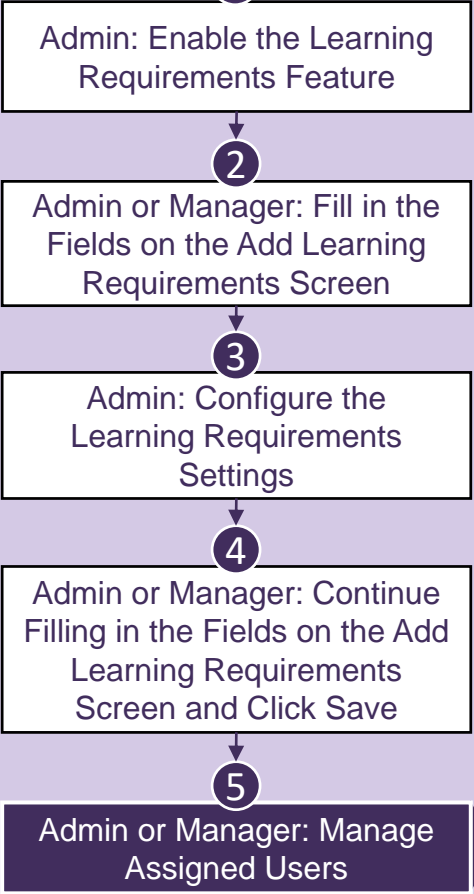
v16.1.0

Last sync:

G

View the Learning Requirement to monitor the progress, such as how many assigned users have completed it versus how many have yet to complete it.

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager



Deltek

Talent Management

Application Development Testing Company English

0

Employees

Search...

View Learning Requirement Details

View All Learning Requirements

Add New Learning Requirement

More Options

EFFECTIVE DATE

7/30/2019

EXPIRATION DATE

8/11/2022

RECURRENCE FREQUENCY

Monthly

RECURRENCE MULTIPLIER

1

MAXIMUM NUMBER OF OCCURRENCES

2

TASK BASE DUE DATE

None

Percent Complete

Incomplete

Complete

1 (20.00%)

4 (80.00%)

Here, you will find a graphical representation of the completion percentage, as well as other useful information to help you monitor the progress of the learning requirement.

Continue

Quick Steps to Add Learning Requirements and Manage Assigned Users as an Admin, Manager, or Learning Manager

1

Admin or Manager: View Learning Requirements

2

Admin or Manager: Assign Learning Requirement Users

3

Admin or Manager: Remove Assigned Learning Requirement Users

4

Admin or Manager: Process the Learning Requirement

5

Admin or Manager: Manage Assigned Users

Manage Learning Requirements

Add New Learning Requirement

Filter

No Learning Requirements to Display

This concludes the Add Learning Requirements and Managing Learning Requirement Users quick steps.