# KELMS Training Coordinator

2015.1

KELMS

Kentucky Enterprise
Learning Management System

Personnel Cabinet

Governmental Services Center

9/25/16

# **K**entucky **E**nterprise **L**earning **M**anagement **S**ystem (KELMS)

KELMS was implemented in 2015 through the installation of SumTotal's Learning Management Solution (LMS) to replace the PATHLORE Learning Management System at Governmental Services Center.

KELMS is an enterprise-wide system that can be used by and configured for all state entities.

KELMS will allow agencies to manage the training processes based on their needs.

- Employees will be able to access their own skills, take charge of their learning and have access to their training transcripts.
- Managers can access training histories to guide team development.
- Leadership can use the training data provided to evaluate skill gaps and/or workforce strengths when needed.

For additional information, please go to:
https://gsc.personnel.ky.gov/Pages/TrainingKELMS.aspx

# Contents

# Introduction

KELMS is a Web-based application that provides you with the tools necessary for finding training, managing learning, and tracking your professional growth. Through KELMS, you are provided with instant access to online learning courses, schedules and details about traditional learning events, as well as access to performance support and knowledge documents.

## Objectives of this Guide

In this document, you will learn how to use KELMS for finding, creating and managing your agency's learning. You will also learn about performance management tasks, such as taking a competency assessment and creating a development plan.

This guide offers insight into how Learners, Managers and instructors and Training Coordinators use the system, how to create efficient training structures that are easy for your Learners to use, and how to make decisions about reporting based on the options built within the system.

## KELMS Overview

Learner mode provides many features. Below is an overview of the feature groups and how you can use them to increase your knowledge and your productivity.

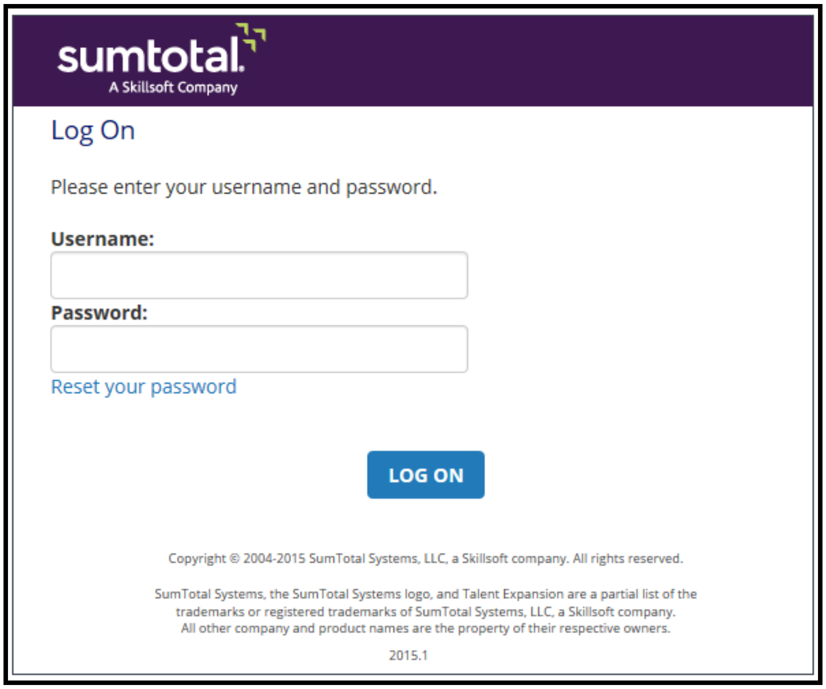
- **Training**: You can access online courses, instructor-led training, seminars, documents and more in one easy-to-use location.
- **Performance Management**: Using SumTotal, you can map skills, competencies, and development plans against your company's business objectives. You can manage your career and growth through alternate job analysis and personal development plans.
- **Collaboration Center**: Using a collaboration center, you can access experts and peers for quick answers to questions or clarification of course material. Expert responses to your questions are automatically captured and stored in a knowledge base, providing an ongoing, searchable source of information for everyone. These expert question and response capabilities make it easier for you to acquire the knowledge you need so that you can get your job done faster.

Prior to completing this class, you must have completed the following training:

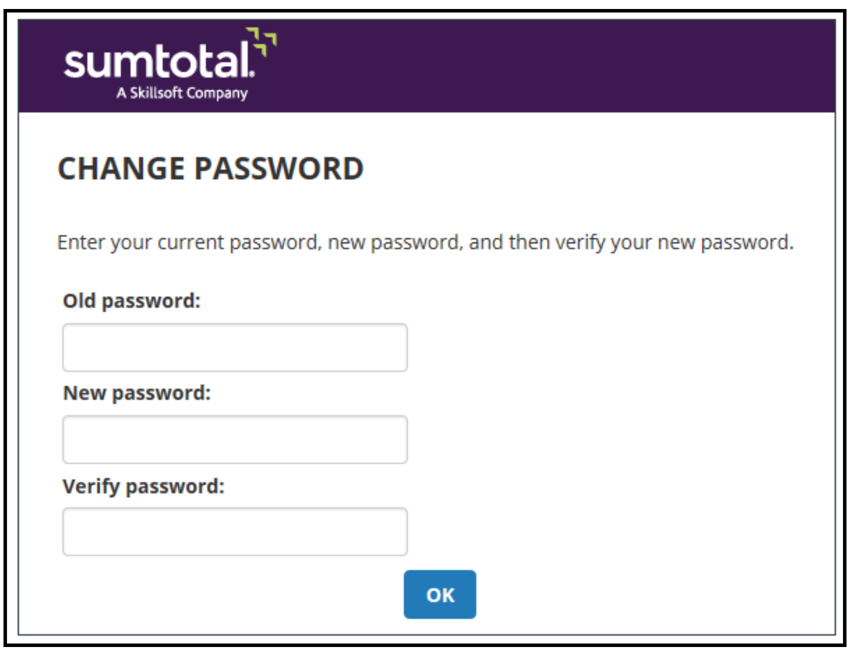
- **KELMS Basics of Navigation**
- **KELMS Manager Basics**

# Logging on to KELMS

The first time you access the **Log On** page, you will be prompted to enter the username and password that have been assigned to you. This will be your employee ID number. (same as KHRIS or eMARS)



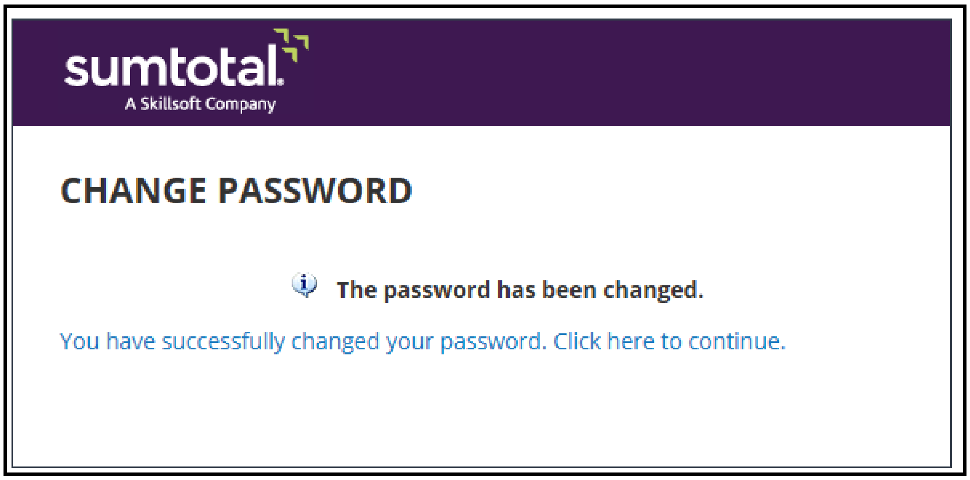

You will then be prompted to change your password.



**Enter your Old Password.** This is the password that that you will receive in your email from the KELMS System Administrator after completing this course.

**Enter your New Password.** It should be at least 8 characters long, one capital letter and one number.

**Verify your password.** This is to confirm that you entered the information correctly.




Once logged in, you should immediately go to your profile to set up your security question.

Setting up a security question allows you to reset your password using the "Reset Your Password" on the login page.

You can access your profile by clicking on the Profile  link in the upper left hand corner once you have logged in.

# The User's Profile and Preferences

A user must set up their security question and answer in their profile if they want the ability to reset their password online. The user may also click on the preferences radio button to change their time zone or any other settings they feel are wrong. Information in the profile is imported from KHRIS. Users should note any incorrect information and inform their Human Resource contact.


It's ok to make a note as to what your secret question is so that you won't forget. As long as you don't disable your login when attempting to login to KELMS, you can reset your own password anytime you like.

**IMPORTANT:** If you need assistance with Password resets or other Technical issues that you cannot resolve contact your agency Training Coordinator or Designated Support Contact (DSC) via email at KELMSDSCGROUP@ky.gov.

A list of Agency Training Coordinators can be found on the KELMS Webpage at:
https://gsc.personnel.ky.gov/Pages/TrainingKELMS.aspx

**Important Reminders for Production**

1) Go to your Profile & Set your Secret Question.
2) Double check your email address. Email address changes MUST be made in the KHRIS ESS System. The KHRIS Import happens at 12:30 A.M. every day.
3) Click on Preferences & double check your time Zone.

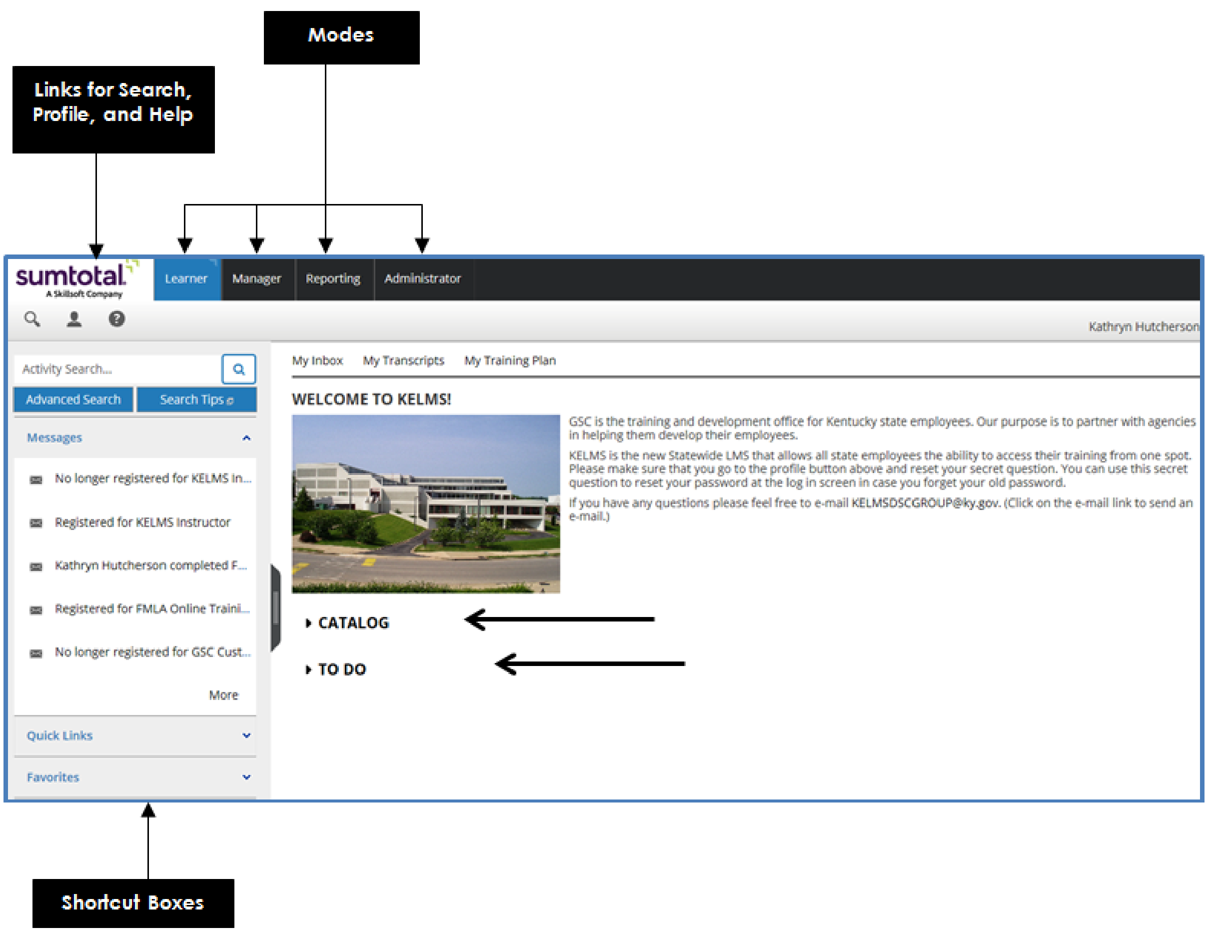
# Exploring the KELMS Interface

After you login to the system, you will see the KELMS Home Page or what's often referred to as the dashboard. From the dashboard a Learner can access their training information, messages and favorites.

**The Learner home page has two major sections:**

**Left Section:** Provides quick access to Search, Quick Links, Favorites and Pending Activities

**Right Section:** Displays My Inbox, My Transcript, My Training Plan, News, To Do Section and Catalog.



The Home page (Learner Dashboard) offers the following options:

| Options | Descriptions |
|---|---|
| **Modes** | Navigate to a different mode by clicking the appropriate button. Up to seven modes may be available depending on the permissions granted to you. |
| **Profile & Preferences** | Use this option to view your personal profile information. This information will be updated by the KHRIS import and will not be available for you to modify. If you have concerns about information that appears to be inaccurate, please contact your agency Training Coordinator. |
| **Search** | Find the training you need quickly by using the KELMS search feature. |
| **Location Path** | Use the location path to navigate to other pages quickly. A quick glance at the location path will tell you where you are in KELMS. |
| **My Inbox** | Use this menu to view notifications messages from KELMS. KELMS will also send notification to your Outlook email. |
| **My Transcript** | Use this menu to view all classes completed since the go-live date of KELMS. |
| **My Training Plan** | Use this menu to access your development plan information. |
| **My Calendar** | Use this menu to view your scheduled trainings on your KELMS calendar. |
| **Learn Menu** | Use this menu to access your learning-related activities. |
| **Plan Menu** | Use this menu to access your development plan information. |
| **Collaborate Menu** | Use this menu to access collaboration centers. (not available) |
| **My To Do List** | Navigate to your training and performance related tasks. |
| **Catalog** | Access the catalog to look for training related information such as courses, knowledge documents and so on. |

# About User Modes

Depending on your role in KELMS (Manager, employee, and so forth) you may access different pages that appear in different modes. Each mode provides features for specific roles, such as the ability to publish training to the system or to manage employee information. If you have permission to access features in more than one mode, you can switch between these modes by choosing one of the mode buttons at the top of each page. In this document, we will focus on Learner mode.

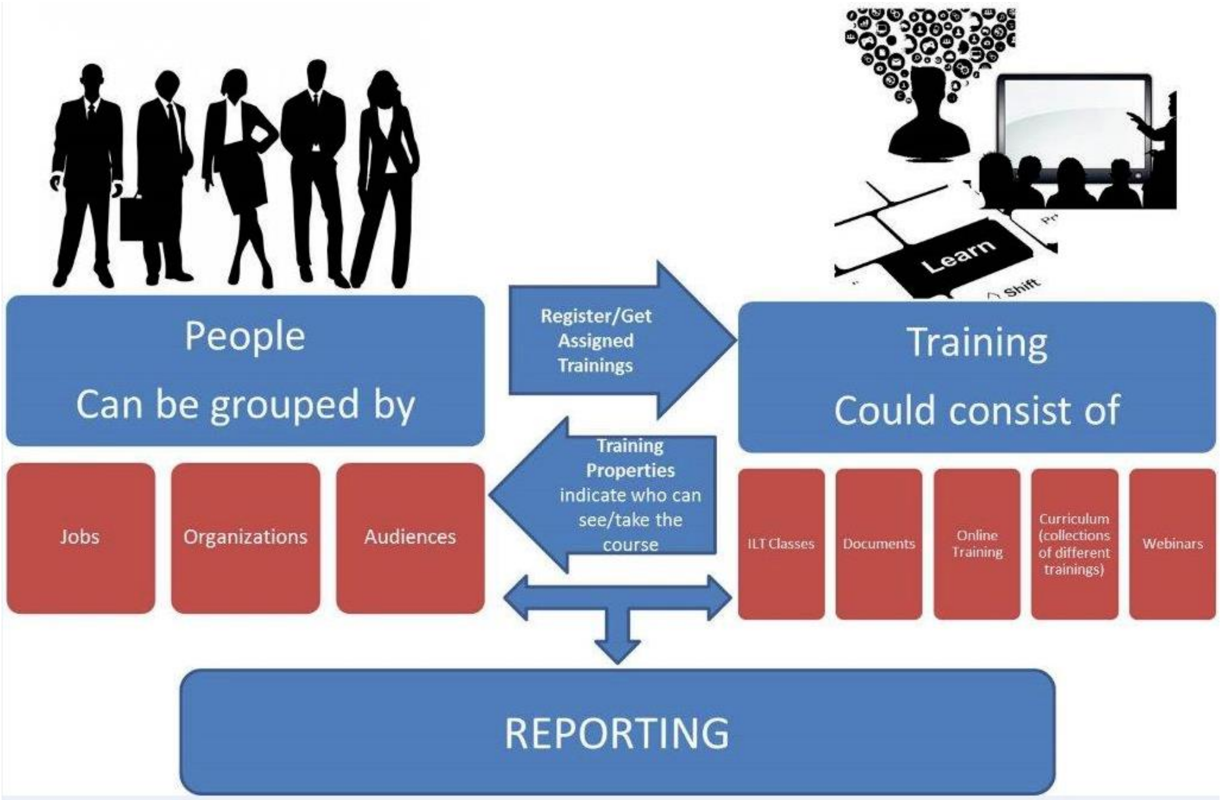
The following table displays mode names, descriptions, and corresponding mode icons.

| Modes | Descriptions | Mega Menu |
|---|---|---|
| **Learner** | Provides access to training and learning activities available to you. | Learner |
| **Manager** | Provides information about training and performance related information for users that Managers are allowed to view. Reports are available for individuals and workgroups.<br><br>Ability to view and manage training and performance data for direct reports<br><br>Run and view reports to track status of assigned training<br><br>Managers can switch view to Learner's home page<br>• View the training catalog, view pending signatures, view transcripts, view outstanding training, register Learners for training<br>• Can't complete training on behalf of the Learner | Manager |
| **Administrator** | Allows users to create, manage, and configure all components that are tracked by KELMS. Employees with permissions to publish online training use this mode to make training available.<br><br>Utilized to configure KELMS structure and all related objects, security roles, | Administrator |

| | | |
|---|---|---|
| | resources, training, learning activities, skills, users, jobs, collaboration centers. Allows the user to switch domains<br>○ This option is not available in Learner or Manager modes<br><br>Can be configured to accommodate different levels of access<br>○ Based on permissions<br>○ Examples:<br>    ○ **System Administrator** - system and domain configurations<br>    ○ **Instructor** – Offerings of learning activities and their related objects<br>    ○ **Training Coordinator** - learning activities and their related objects<br>    ○ **Domain Administrator** – domain, users, and learning activity related objects | |
| **Reporting** | Provides interactive reporting and analysis for measuring the impact of training within an organization.<br><br>View and print reports<br><br>○ Choose the type of data to view by selecting parameters<br>○ Export reports to PDF, XLS, XML, TIFF or CSV formats<br>○ Create reports using the Report Authoring Wizard<br>○ Publish custom reports developed using Microsoft Visual Studio Bids<br>○ Apply filters<br>○ Restrict access to a report by assigning an audience<br>○ Schedule reports for delivery via email |  |

# Working as a Training Coordinator

## Graphical Overview (Map) - Key Processes




The basic workflow for KELMS revolves around you delivering training to your users. The jobs of your users will determine how you group them into Organizations in the system. The jobs, organizations or even individual users can be used to create new audiences for assigning training.

Learning activities are any training opportunity that you create in KELMS. It can be any digital document or SCORM package that you upload, it could be a virtual class scheduled in the system, it could be an instructor-led course that will be held at the central training facility, an on-the-job training class run by a Manager on how to use specific equipment, or a training class run by a vendor specializing in technical skills.

Ultimately you will attempt to determine how much learning was accomplished by assessing your users and reporting on their outcomes. Assessment of learning is covered in this user guide.

Reporting is an integral part of KELMS, and so there will be discussions of reporting considerations. For example, what types of reports are commonly available and what types of reporting might require more complicated report or data set domain creation. However, in depth coverage on how to create reports and data sets domains using Advanced Reporting will be covered in future training classes.

# User Overview – Training Coordinator

You are developing learning solutions that help your agency develop a stronger, compliant workforce. But when people log in, what do they do? The following section introduces you to the types of roles most agencies use. You can also use this section to help train Learners, Managers, instructors and Training Coordinators once you are ready to deploy KELMS to your Learners.

**The role the Training Coordinator plays in KELMS is varied**. You may be a trainer or human resources Manager that creates training programs, and thus may perform some of the roles of a Domain Administrator. You may be an Training Coordinator for one or more domains. Then you will have some, but not all, of the tasks pertaining to the global system Administrator.

This guide covers essential processes, best practices and common mistakes, and reference tables for quick useful information.

As a Training Coordinator,

I want to:

- Create training programs
- Set requirements
- Create agency specific ILT Courses for Instructors
- Upload online Training
- Register employees for a class (both Instructor Led and Online)
- Assign the training or have the Learners register
- Create/modify Resources
- Assist Agency KELMS Instructors with daily tasks
- Reset Passwords
- Submit KELMS Agency Security Form (KARF) to add new users or revoke access
- Monitor agency's training goals
- Run KELMS Reports
- Monitor training Print & manage rosters for trainings for which you are responsible
- Look up learner transcripts
- View earner activities

  Add external training to a learner transcript
- Assist Learners with using KELMS
- Ensure training stays up to date

**IMPORTANT:**

1. If you need to add or make a change to the security role of a Training Coordinator or Instructor, **you must submit an Access Request Form to your Agency Security Contact**. You can access this form from the KELMS Webpage at: https://gsc.personnel.ky.gov/Pages/TrainingKELMS.aspx
2. You as a Training Coordinator are the first point of contact for your agency KELMS Instructors. If you need technical assistance, please contact a Designated Support Contact (DSC) through the following email **KELMSDSCGROUP@ky.gov**

# Finding Learners and Activities

## Learner Records

Everyone in the system is a Learner, and every active Learner record holds a license within the system.

**KHRIS Import:** Learner records are imported into KELMS on a daily basis from KHRIS to provide updates to the Learner records. When an employee is no longer active, their Learner record will be marked inactive on the data load through the import process. This will release a user license for the agency. If there is an email discrepancy you should notify the employee so they can update the email address in the KHRIS ESS system or your Human Resource Generalist (HRG) can assist if needed.

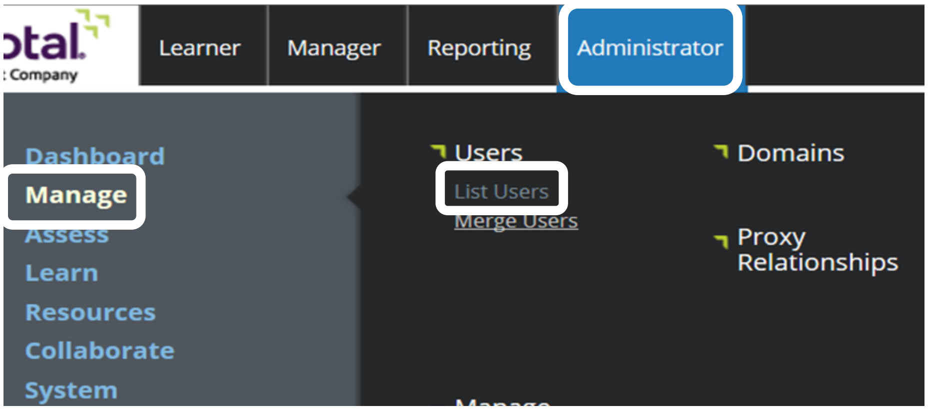
**IMPORTANT:** Not all contract, part time, interim or quasi employees are in KELMS. If your agency has a need to train and track training for a contract employee, who is not in KELMS your agency will need to purchase an additional license for each learner you wish to add. You will be required to maintain the Learner record in the system and it will occupy a license for as long as the employee is actively employed or until such time as your agency instructs you to deactivate the Learner record. Training histories will be maintained in the KELMS system when the Learner is marked inactive.

Learners are housed within the KELMS domain structure. As a Training Coordinator, you can view and modify the Learner records of the employees who are located within your domain. We will talk more about domains as we continue through this training course.

## Exercise 1 – Find & View a Learner Record

► **Follow the below steps to find and view a learner record:**

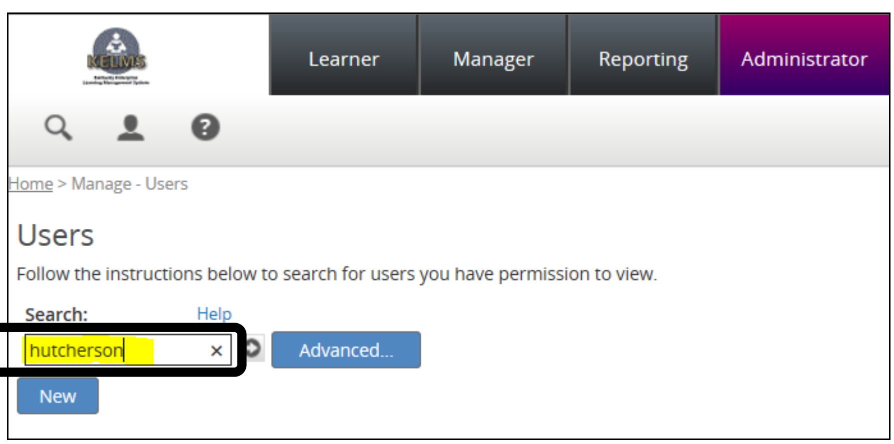
1. Hover the mouse over the ***Administrator*** tab.
2. Hover the mouse over **Manage** in the drop-down menu.
3. Click **List Users** under **Users** in the options that appear to the right of the Menu.



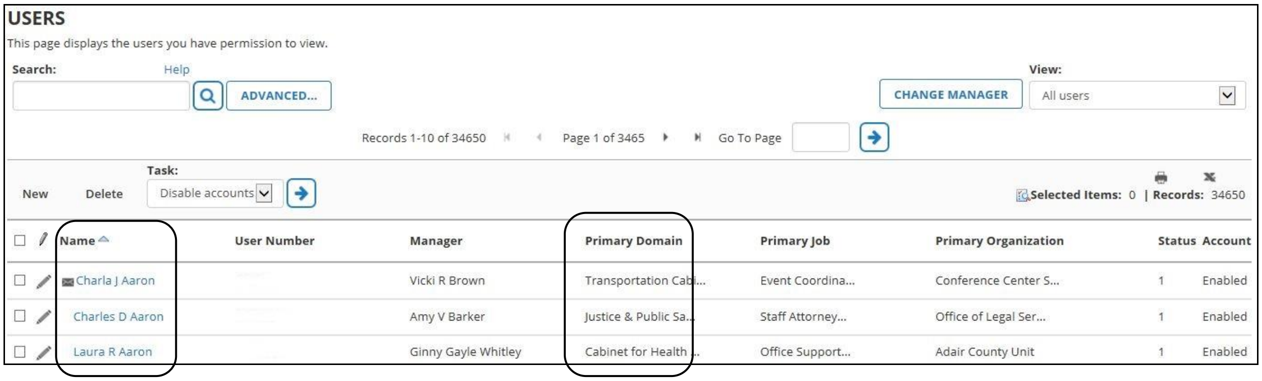

4. The *Users* page will appear. Type the learner's name in the *Search* box to search for the desired learner. **Click the Go** button.

5. **Note**: You can type any combination of last name and first name in the *Search* box and the search result will display the names in your domain according to the current records stored in KHRIS. If you leave the *Search* box empty without typing any text in it, once you click the **Go** button, it will return the names of all the learners.

6. The User Screen will appear allowing you to search for the user you wish to find.

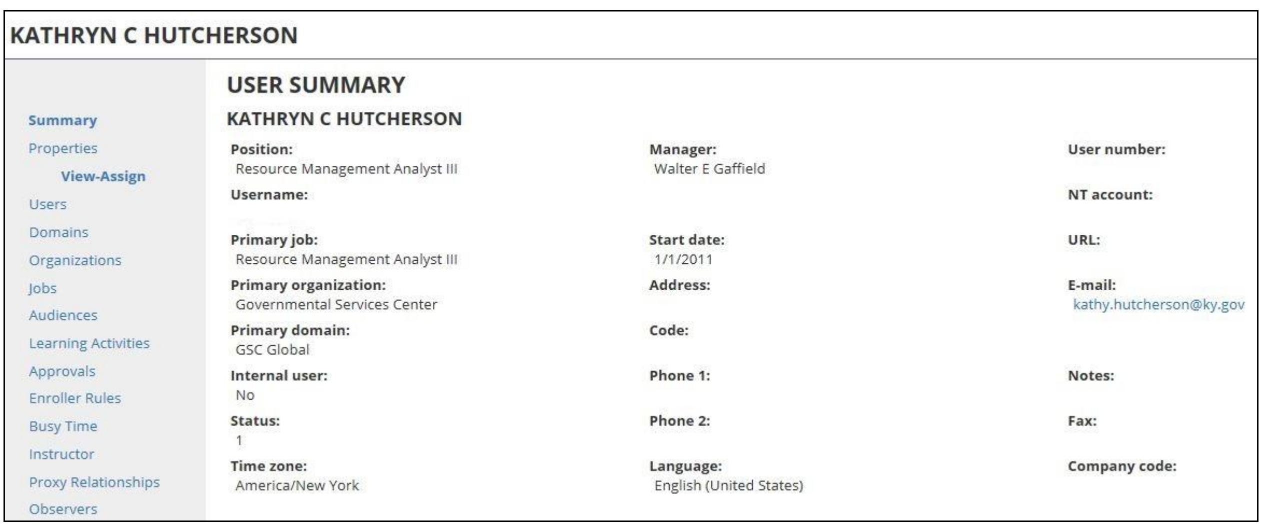


The User Screen will reappear reflecting all users that are located within your domain.




- The **Envelope** reflects that the learner has an email address in the system.
- The **Pencil** allows you permission to edit the learner record.
- The **Box** beside the pencil allows you to "select" the learner.
- **Clicking on the name** allows you to open and view the learner record.

7. **Find the name** in the list of returned names and **click on the name to open the User Summary page**



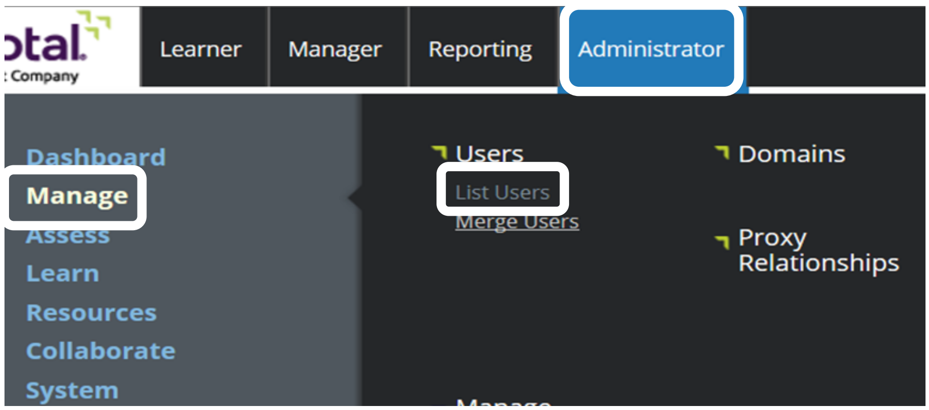

The **User Summary page** reveals all the personal learner record information retrieved from the KHRIS Import.

| |
|---|
| **TIP:** |
| **The % Symbol can be used in KELMS for a Wild Card search.** |

## Exercise 2 – Edit a Learner Record

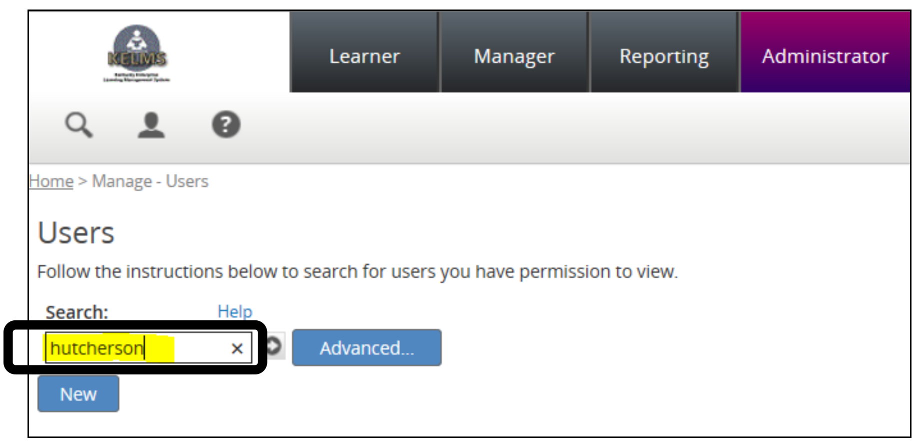
► **To Edit a Learner Record:**

1. Hover the mouse over the ***Administrator*** tab.
2. Hover the mouse over **Manage** in the drop-down menu.
3. Click **List Users** under **Users** in the options that appear to the right of the Menu.

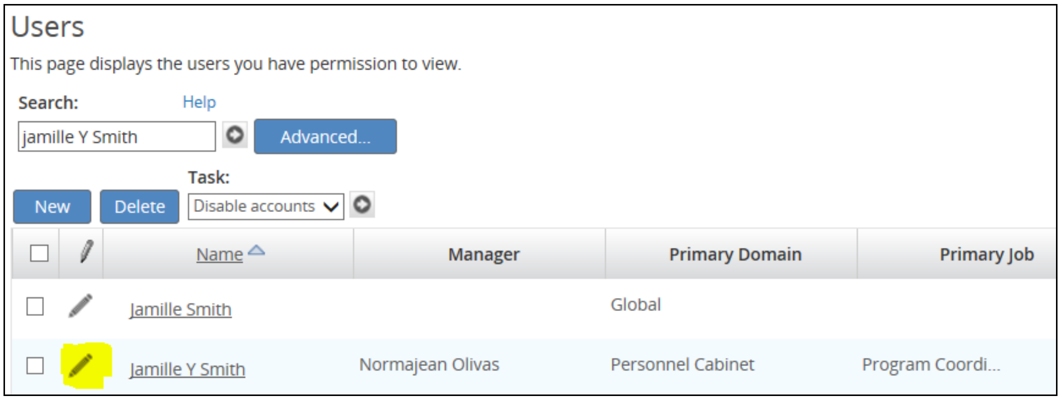



The User Screen will appear allowing you to search for the user you wish to find.

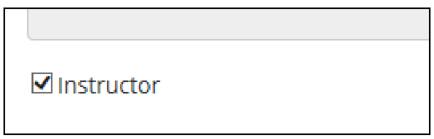
4. **Enter your name** in the search box and **Click Go**.



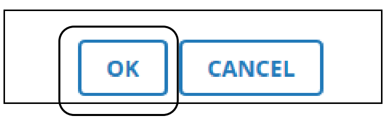
5. **Find your name** and **Click on the PENCIL** to open the User Properties page in **EDIT** mode.




6. **Scroll toward the bottom left hand side and place a check mark in the Box by Instructor.** Doing so indicates this person is an Instructor/Consultant/Trainer who actually teaches a class.




7. **Scroll down and Click OK** to save the changes.



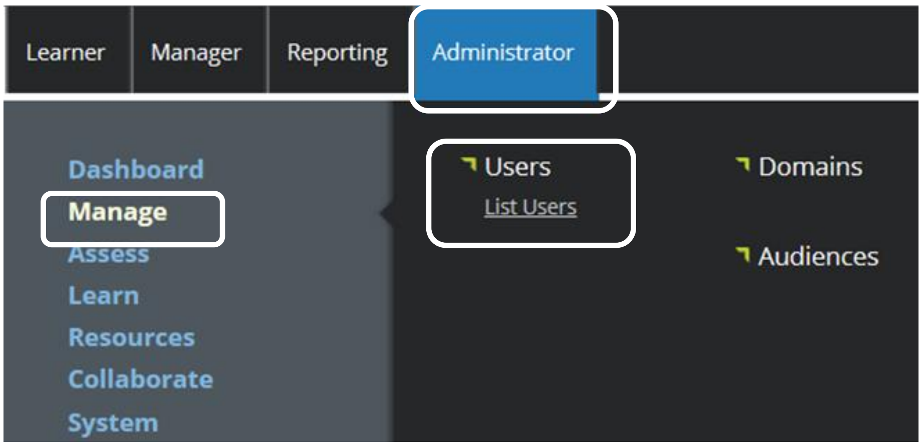

**TO RESET PASSWORD**

**REFER TO PAGE 8 OF QUICK REFERENCE SHEET**

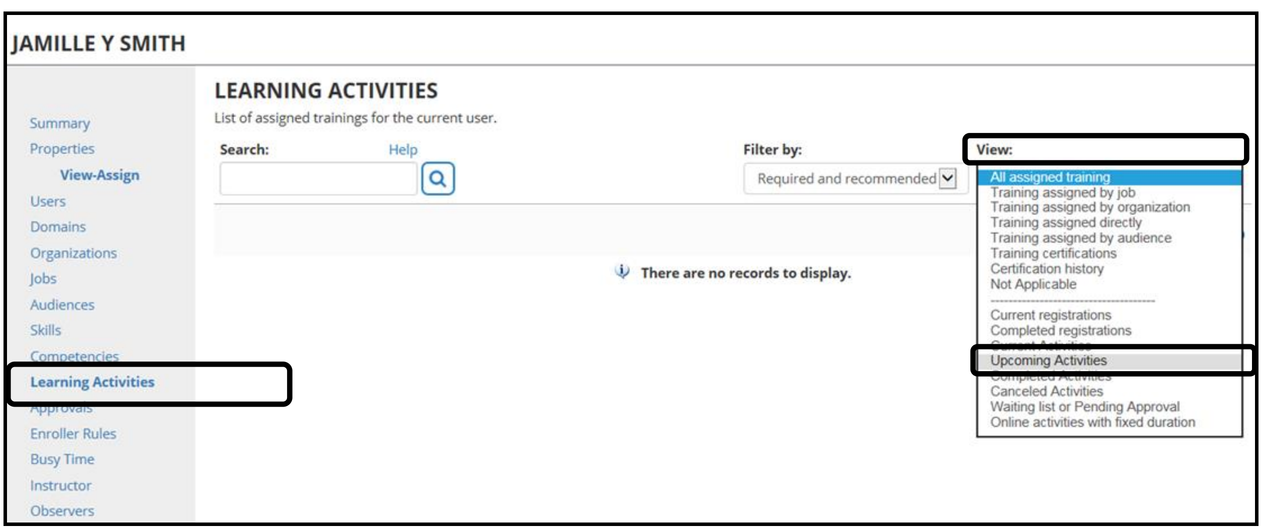
## Exercise 3 –View a Learner's Upcoming Activities

► **To View a Learner's Upcoming Activities:**

1. Hover the mouse over the **Administrator Tab.**
2. Hover the mouse over the **Manage menu.**
3. Hover the mouse over **Users.**
4. **Click on List Users.**



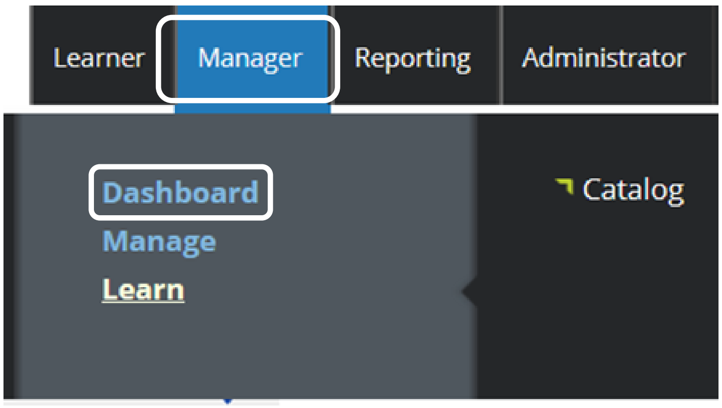

5. The user search screen will appear. In the search box, **enter the learner name, employee id or email address of the person you want to find. Click Go.**
6. **Click on the learner name** to open the User Summary Page
7. **Click on Learning Activities** in the Summary Box.
8. **Select your View** on the right hand side of the screen **Choose Upcoming Activities** to see all the upcoming classes.



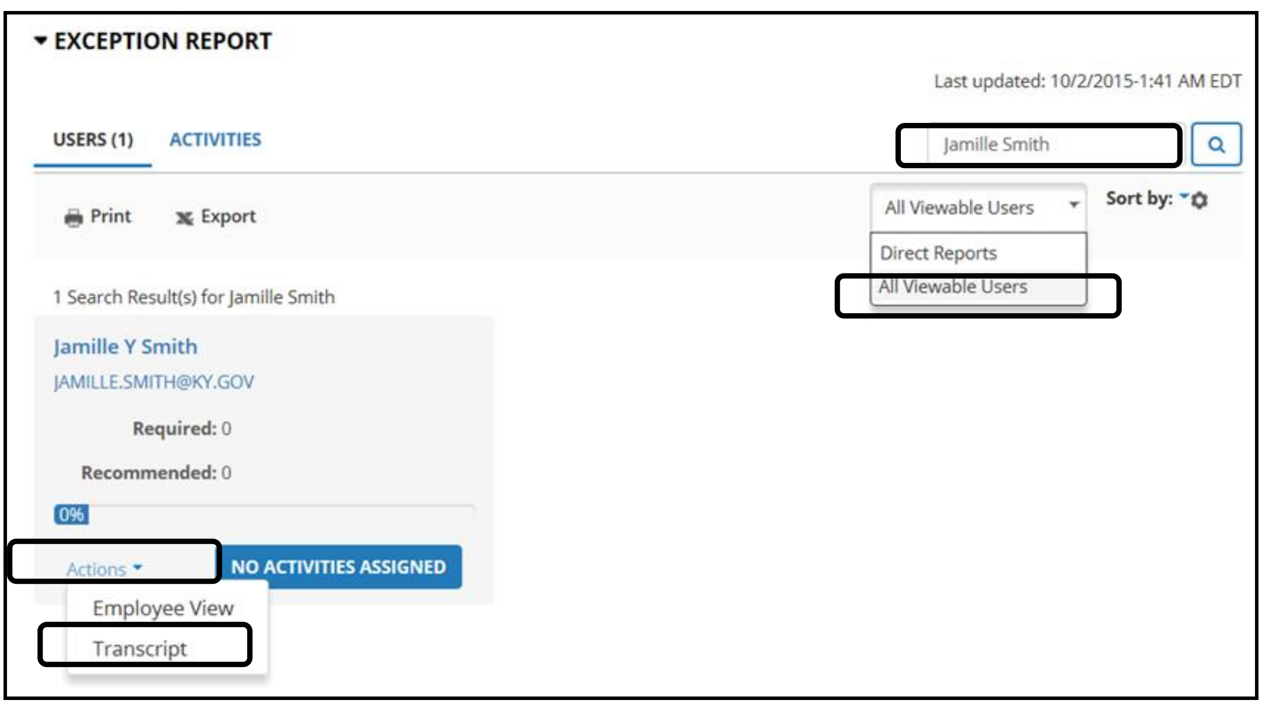
# Exercise 4 –View Learner Transcript

►**To view Learner's Transcript:**

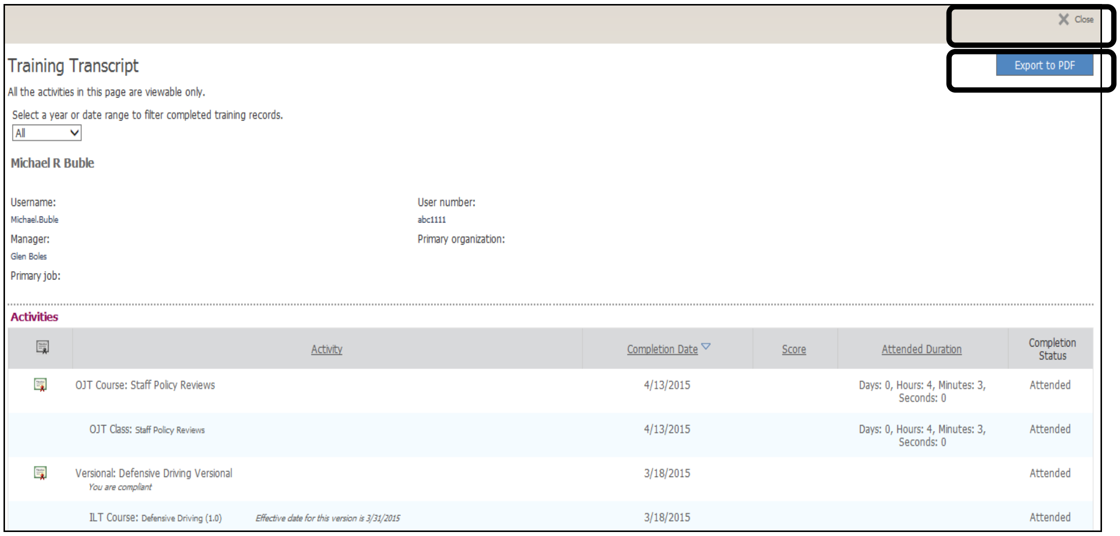
1. Hover the mouse over the **Manager Tab.**
2. **Click on Dashboard.**




3. Change Direct Reports to **All Viewable Users.**
4. In the User Search box, **enter learner name** (Refer to Student Card).
5. The **learner tile will appear**
6. **Select Actions>Transcript**



7. You can now **view the transcript** and have the option to **export it to PDF** (See export button in top right hand corner of screen)




8. **Click the close button** above the PDF Button to return to the Exception Report.

# Locate Training

## Using the Catalog to Find Training

The **Catalog on your Learner Dashboard** is your Domain's catalog. Here you can see the categories created by your Domain which contain courses and classes that are available to your organization from the KELMS database.

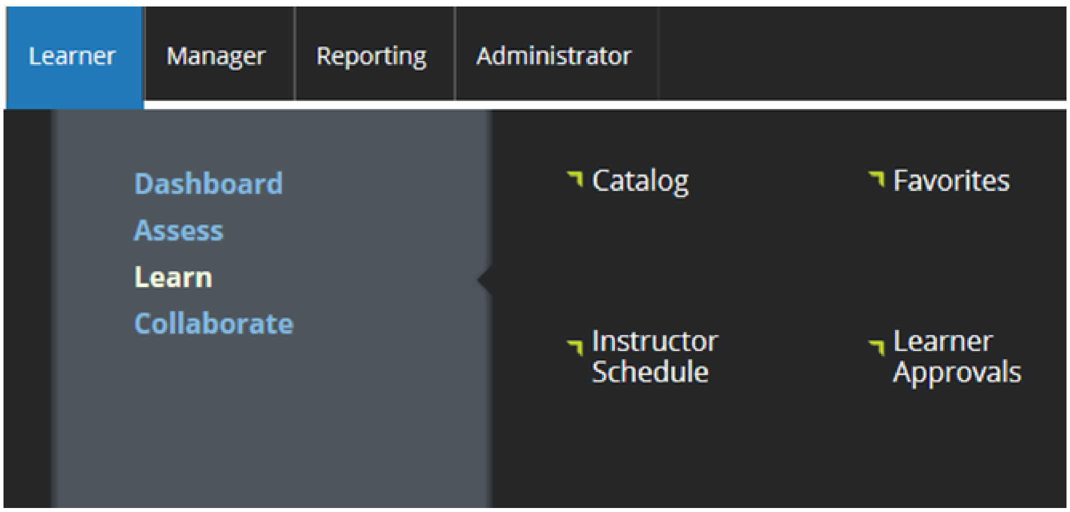
To see the **Global Catalog,** hover over **Learner>Learn> (Click on) Catalog**. This is where you will find the "state-wide" training offered to all agencies throughout the Commonwealth. Example: GSC, KHRIS, eMARS, Personnel, Budget (OSBD), etc.


Note: If the creator of the activity does not assign a category, you may not be able to locate it through the Catalog search. If this happens go back to the Learner Dashboard and search for the activity.

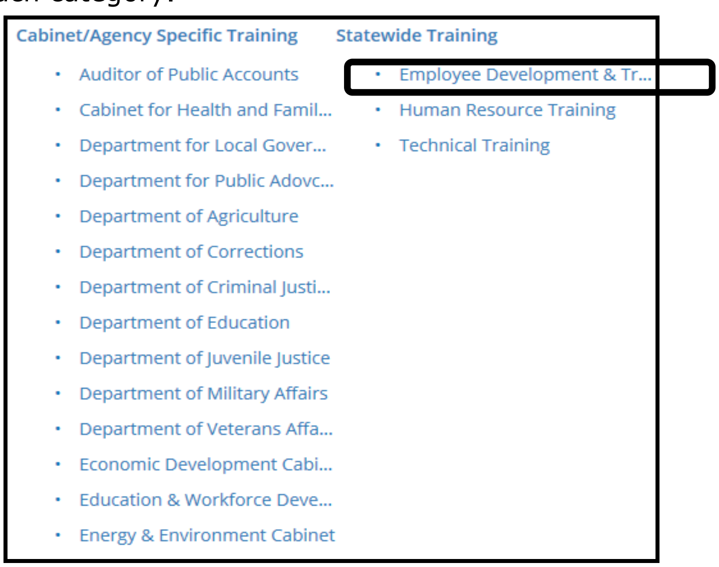
## Exercise 5 – Using the Global Catalog to Locate & Register Yourself for an ILT Class

►**To use the Global Catalog to locate an ILT Class:**

1. **Hover the mouse over the Learner mode.**
2. **Hover the mouse over the Learn menu.**
3. **Click on Catalog.**



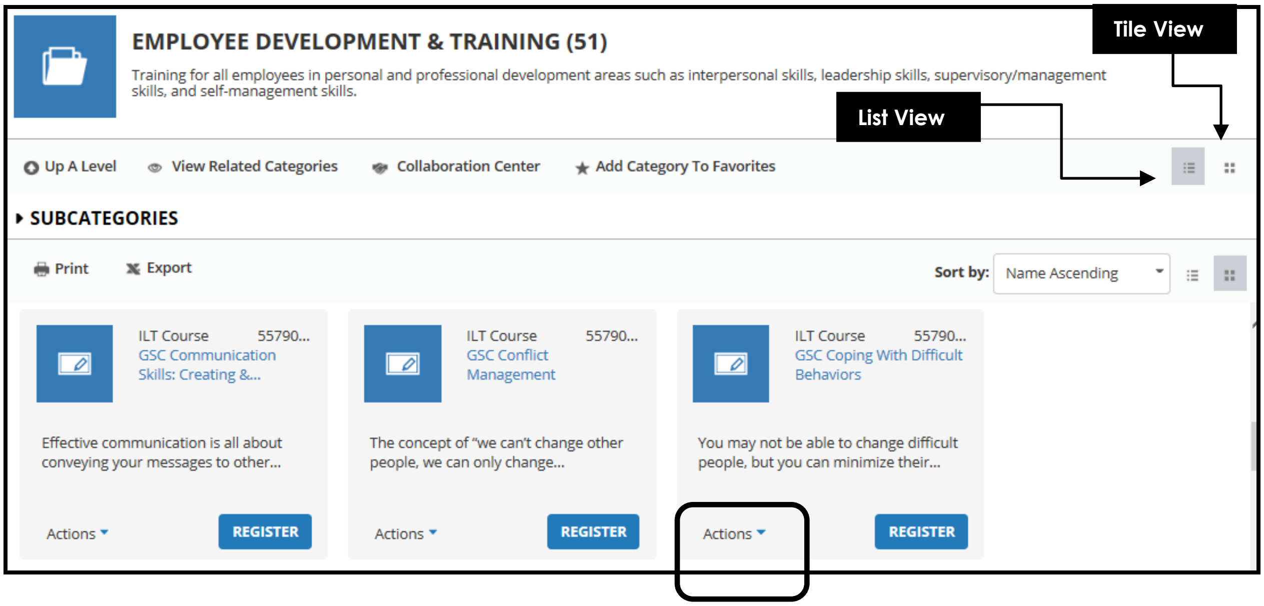

The **catalog categories will appear** with a list of ILT Courses organized alphabetically beneath each category.



4. **Select the Category you wish to search from (Refer to your Student Card)** a list of ILT Courses will appear.

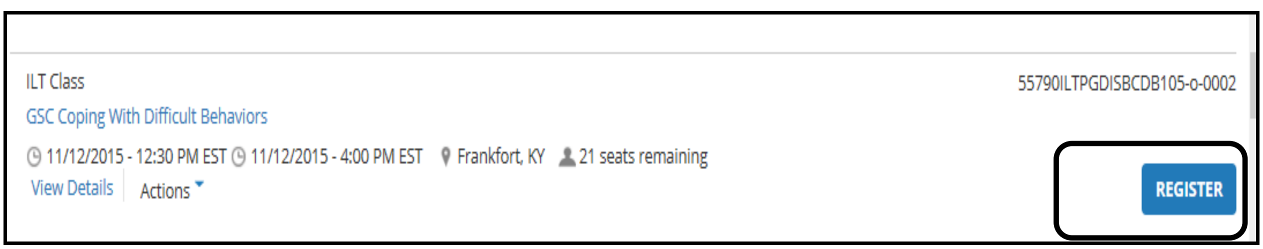
5. When you find the ILT Course **Hover over Actions.**

6. **Select "View Subactivities."** To view all the class offerings available for that particular course.



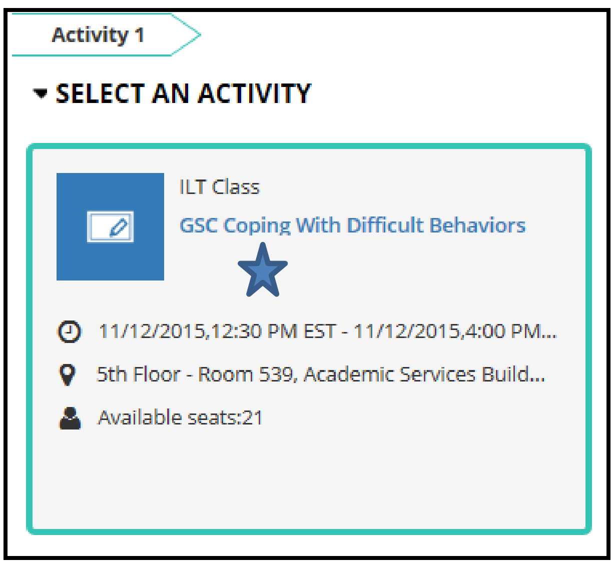

7. **Choose** the class date and time you want.

8. **Select Register** to register yourself for this class

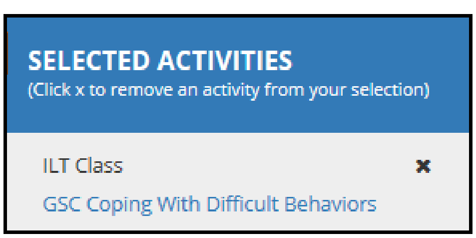


The “SELECTED ACTIVITIES” page will appear.


9. **Click** in the white space under the class name to select the class. Selecting the class will place a green box around the class.




10. **Click Next**




11. **Click Submit**

After clicking Submit, you may have noticed that KELMS communicated with your Outlook to send a notification to you informing you of your class registration. It also may have tentatively marked your calendar for the scheduled training date.

**Congratulations! You have completed the registration process.**

The activity details screen will appear to provide you additional information about your registration status and activity progress.

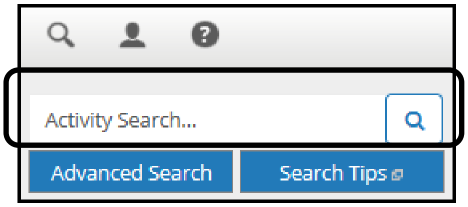
12. **Click Done.**

You can now go to the Learner Dashboard and see your class registration in your To Do List.


Note: After completing the registration process, the system will send a registration confirmation notification to the learner to inform them of their registration in the class. At the bottom of the notification is a link which will allow the learner to add the training to their Outlook calendar.

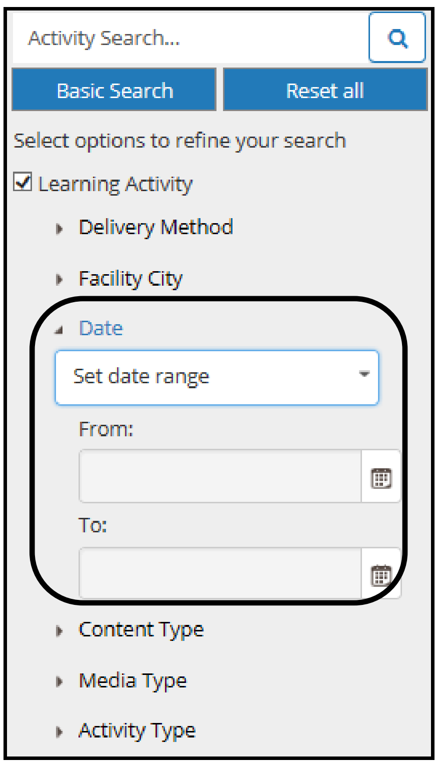
## Using Basic Search

You can use basic search feature to find the training of your choice. Type the name of the class in the search box and search results are displayed.




## Using Advanced Search

Sometimes you may want to locate items by a certain set of criteria, such as by location or delivery method. The advanced search feature helps you refine your search. You can filter your search using multiple criteria such as activity type, content type, media type, delivery method, location, date, or additional options.



# Exercise 6 – Using Advanced Search to Register Others for an ILT Class

### ► To use the Advanced Search feature:

1. From the Learner Dashboard, **click Advanced Search** below the Activity Search box.

2. **Click on Date.**

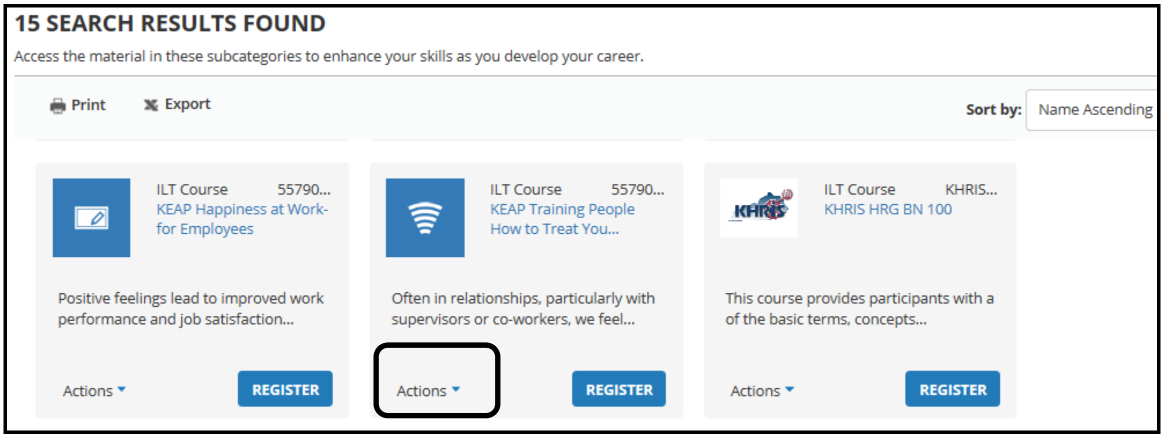
3. **Select "Set Date Range"** from the drop down. **(Refer to your Student Card)**

4. **Enter** the From/To date by using the Calendar.
5.


**<u>Important</u> – You cannot type the date in, you must use the calendar.**

6. **Click Search (Magnifying Glass)**
   a. The search will return everything the system can find that falls in this date range.

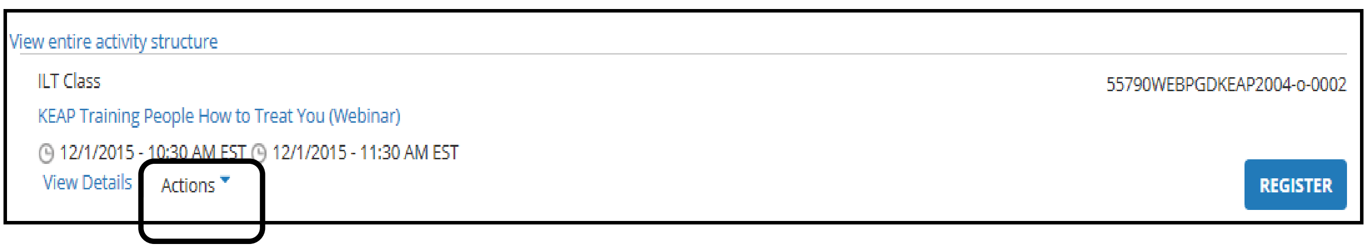
7. **Locate** the activity you want. **(Refer to your Student Card**) & **Hover over actions.**




1. Select **View Subactivities** to see all the available offerings of this course.

2. Locate the class date you wish to register others for **(Refer to your Student Card).**

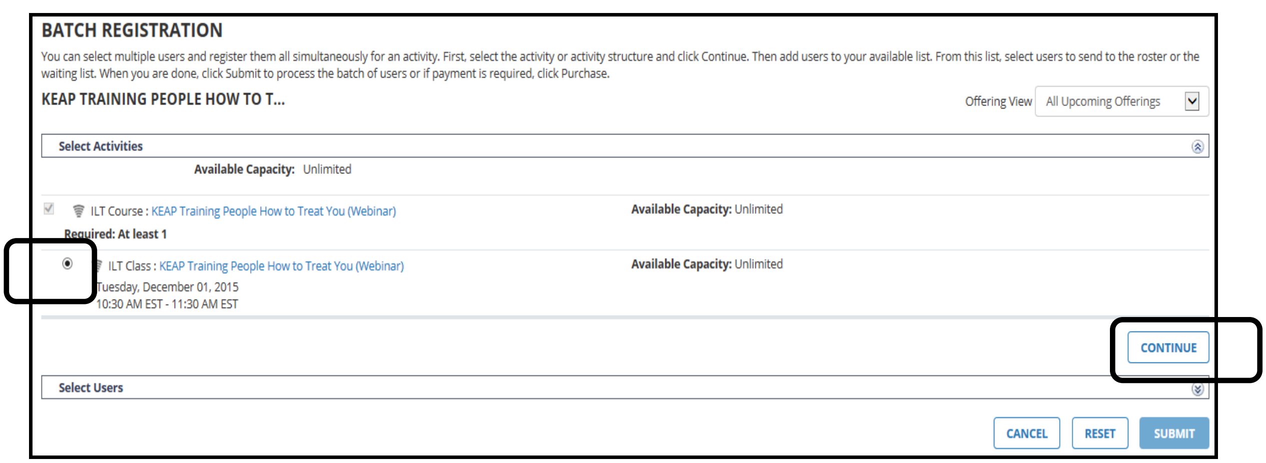
3. From the Actions Menu, **Click "Register Others**".




The Batch Registration Screen Opens. This will allow you to select multiple users to register for an activity.

4. **Select the Radio button** beside the class you wish to register the users.

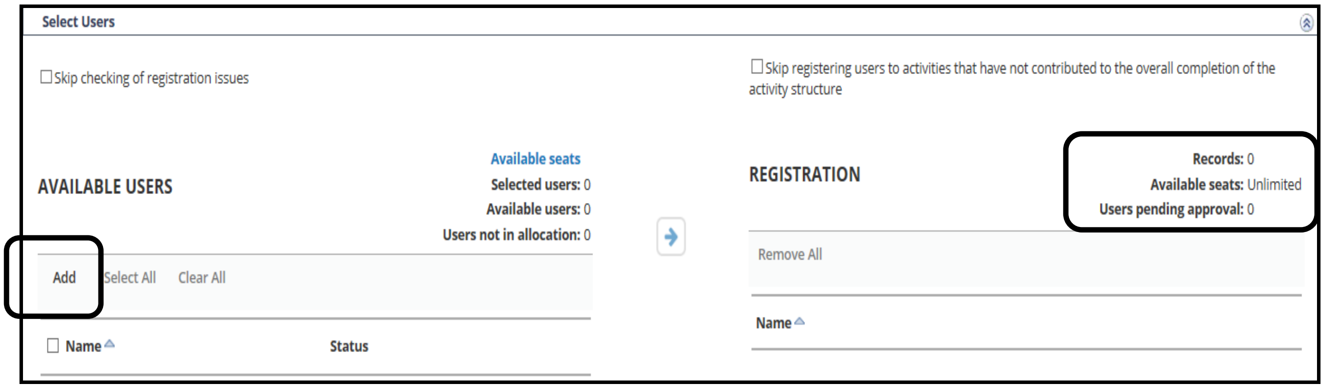
5. **Click Continue button and scroll down.**



The Batch Registration Screen expands at the bottom to allow you to select the available users for the class.

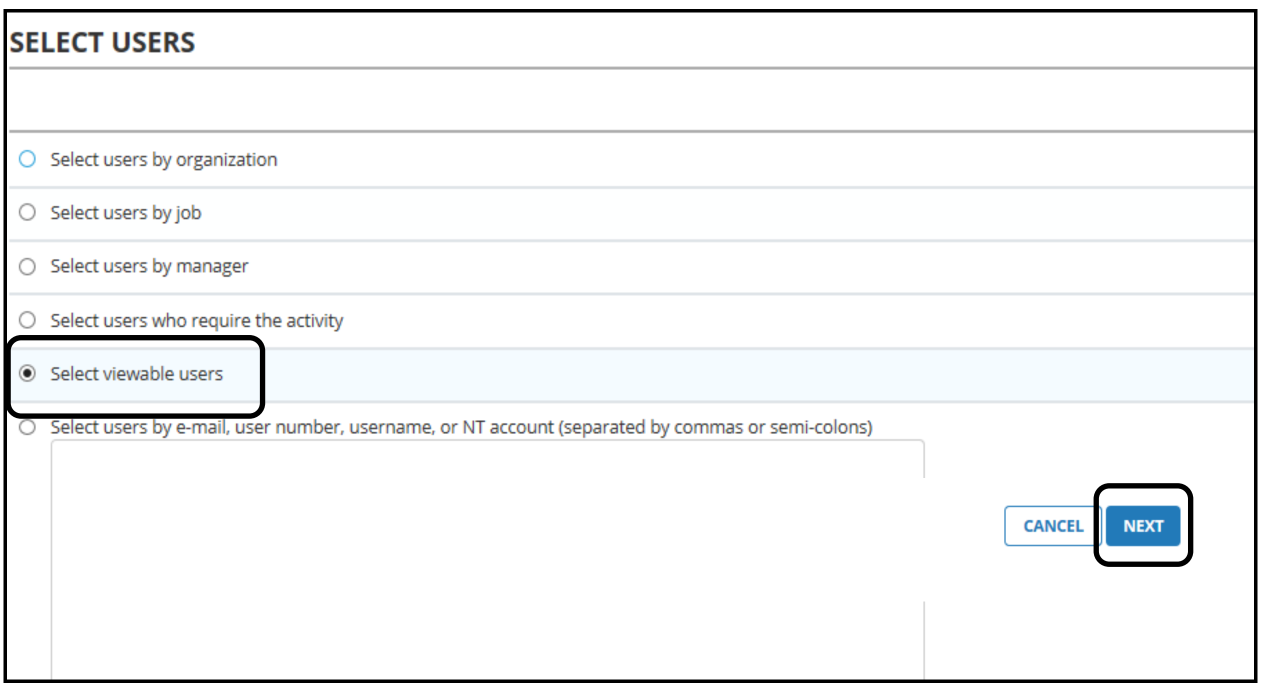
Observe the available seats in the class on the right hand side of the screen.

1. **In the "Available Users" box, click the Add button**




13. **Select viewable users (default). This is where you decide "how" you want to search f**or a learner in the system

14. **Click Next**



15. **Search for the learn name** (you can search by email address, employee id, etc.)

16. **Check the box** beside of the first name you find, then go back to the search window and enter the next name you need. Place a **check in the box** for second person as well. The KELMS will remember all those for whom you have checked the box.

17. **Click done** when you are finished selecting the names.

18. **Click the top** ⇨ in the middle to move your selected available users to registration; Click on the bottom arrow to move them to the wait list if the class is full. **(Pay attention to the selected users in the Available Users box. Make sure you don't have too many people selected.)**

19. **Click Submit**. DONE!

**<u>Notifications:</u>** Within 3-5 minutes a notification letter will be sent out by KELMS notifying the learner of their registration status. The user who registers the learner for the class will also receive a copy of the notification letter that goes out to the participant.

# Single Classes

In this section, you will learn how to create a single class in KELMS.

A Class is a learning event that may be facilitated by an instructor or is self-directed by the Learner. You can use a Class to:

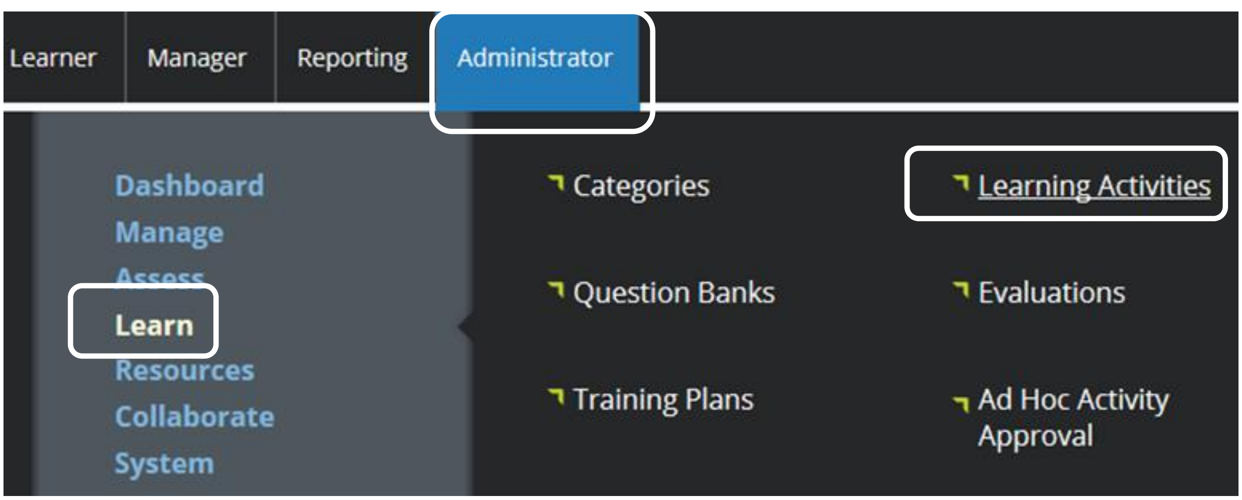
- Create a single class and schedule the date and time.

  KELMS does not display the Offering Wizard when you use the Class activity type. When a class is a specific offering of a course, use the ILT Class activity type instead of the generic Class activity type.
- Create content that Learners can access using a URL or content uploaded in KELMS.
- Create content that cannot be copied.

## Exercise 7– Create a Single Class

► To create a simple one-time only class

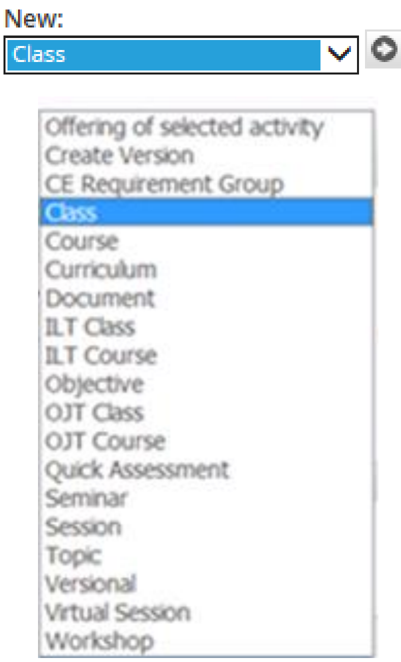
1. Hover the mouse over the **Administrator** tab
2. Hover the mouse over the **Learn** menu
3. Click **Learning Activities**



**4.** The Learning Activities page will appear.

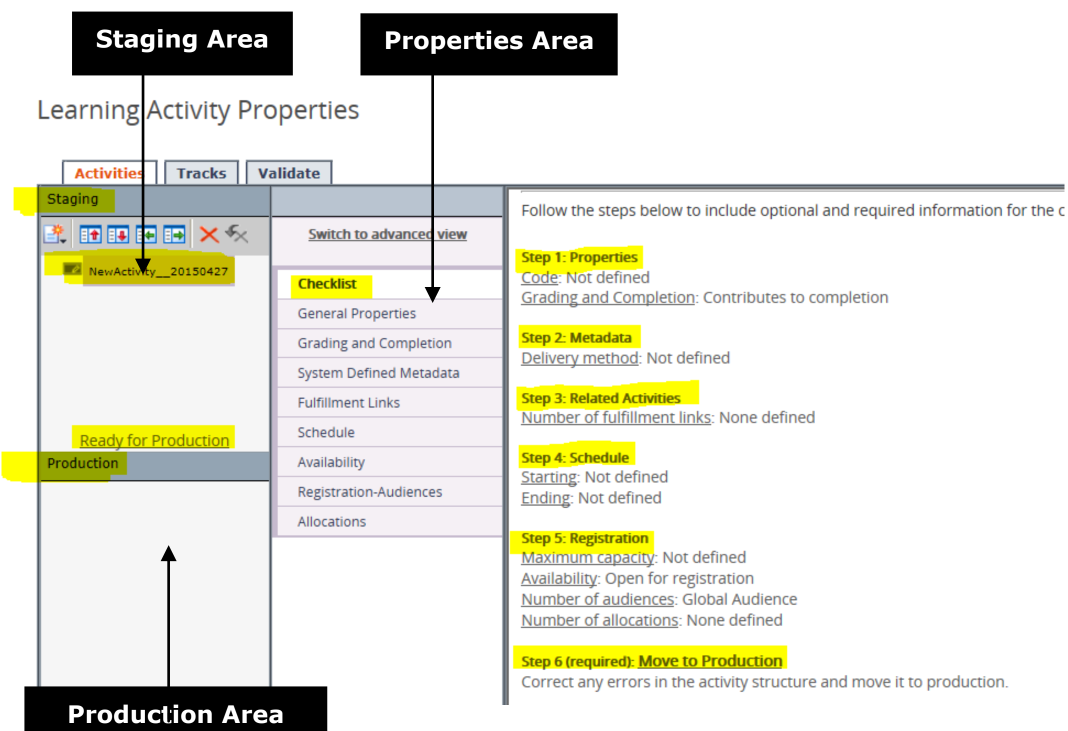
**5.** Under the NEW box, **Select Class** from the drop down menu.

**6.** Click **Go** 




The Learning Activity Properties page opens, see the screen shot below.

There are 3 sets of properties that are essential for you to create this class. They are as follows: **Staging Area, Production Area** and **Properties Area**.



- **Staging Area**

  Contains the name of the class or learning activity with which you are creating. As you can see from the screen shot above the new activity is in the Staging Window. Once all updates have been made to the class in the properties area (name your class, activity code, date, location, resources, etc..) and you are ready to allow Learners to see and register for the class, it is ready to send to production. **As long as the class is in Staging, it cannot be seen by Learners.**

- **Production Area**

  Production is the location where a class or learning activity must reside in order for Learners to see and register for the activity. In order to modify the class/learning activity, you must move it back to Staging. After modifications have been made, the class must be moved back to Production again.

- **Properties Area**

  Properties contain General settings which allow you to set the name, course number, course image, instructor name, audience, etc. Choosing a category of properties from the middle column on the page displays the associated properties in the workspace to the right.

**7. Click on Switch to Advanced View**


The properties category displays several properties that you can configure for a learning activity including **General properties, Status, Notes, Certification, Grading and Completion and Translation** properties.

**8. Click Properties Category**, **Click on General.** The General Properties page opens to the right hand side of the screen. (Review the below screen shot)

**9. Enter the Class Name**. (***Refer to your Student Card***)

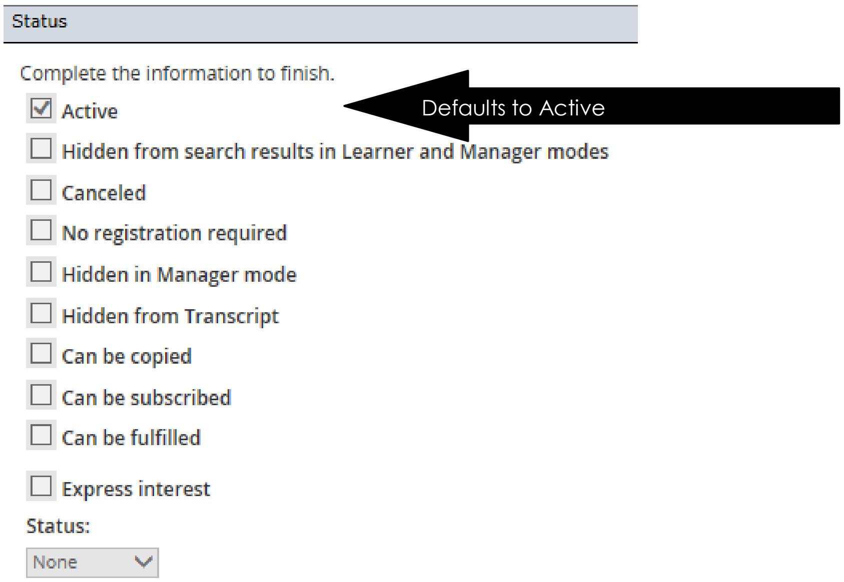
> **<u>Note:</u>** Your class is added automatically to the domain that you are currently in and you are listed as the Owner of the class.

**10. Enter the Course Code.** (***Refer to your Student Card***) This code will help you as well as the Learner to find the activity using the advanced search feature.

### The General Page


**11. Click Apply**

**12.** Under Properties (in the center) **Click on Status.** The Status page opens to the right hand side of the screen. (Review the below screen shot)




**13.** "Can be Copied". This will allow a copy of the learning activity to be made and should only be used with creating ILT Classes.

**14.** "Can be Subscribed". This will allow a other activities to subscribe to this activity and should only be used with creating ILT Classes.

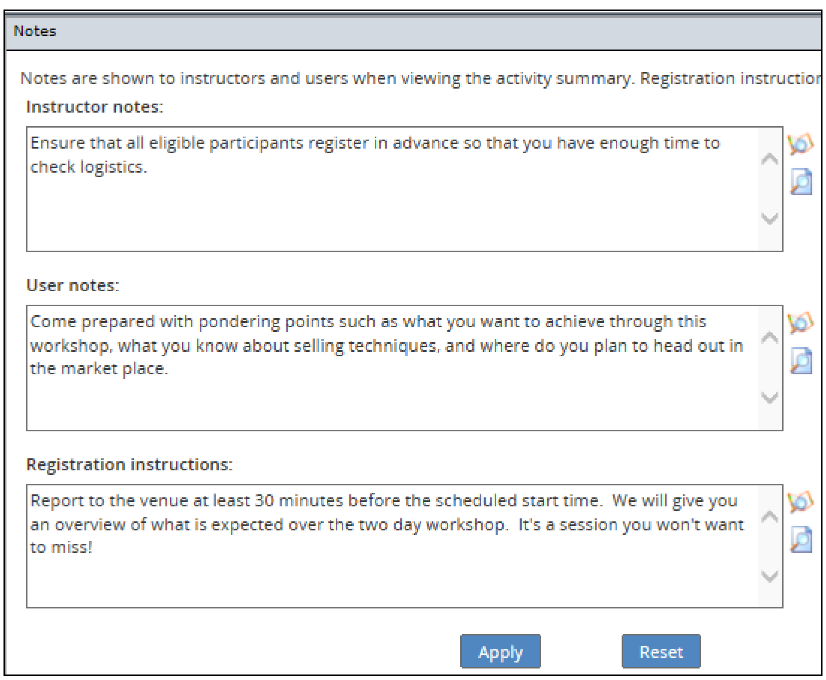
| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Active** | Makes the learning activity active. The learning activity is available to be placed in registration tracks and search results. This property is selected by default. | Learners can search for the learning activity in Learner and Manager mode. |
| **Hidden from search results in Learner & Manager Mode** | Hides the learning activity from search results in Learner & Manager Modes | Learners cannot view the learning activity in search results. |

| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Canceled** | Cancels a learning activity | Learners receive an activity cancellation notification and will no longer view the learning activity in Learner mode.<br>If an activity is cancelled after a few Learners have registered, the activity will be visible in the training schedule for those Learners who have already registered. |
| **No registration required** | Specifies that registration is not required for the selected learning activity | Training Coordinators use this setting for online activities so that Learners are presented with a launch button instead of being requested to register for this type of activity. If you want to enforce prerequisites for these activities, do not select the No registration required check box as prerequisites are validated during registration. |
| **Hidden Manager Mode** | Hides the learning activity in Manager mode. This is mostly used for self-reported training which the Commonwealth is not using. | Managers cannot view the learning activity while generating training transcript or while viewing the training schedule for a direct report. |
| **Hidden from Transcript** | The learning activity will not appear in the Learner's transcript report. | |
| **Can be copied** | Indicates whether the activity may be copied or not. | Allows a copy of the learning activity to be made. Selecting this property will allow you to copy offerings to create new offerings. Note: This property is disabled for uploaded content such as online courses. |
| **Can be subscribed** | Specifies that the activity will accept a subscription link. | Set this property to allow other activities to subscribe to this activity. |
| **Can be fulfilled** | Specifies that the activity can be fulfilled by other activities. When a fulfillment link is in place, a user can complete a single training requirement in more than one way. | Set this property to allow other activities to fulfill (complete) this activity. This option must be selected before a fulfillment link can be set. |
| **Enable collaboration center** | Makes the collaboration center for a learning activity available. | Learners can access the collaboration center associated to the learning activity from the Training Schedule page. |

| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Express interest** | Enables Learners to express interest in the activity. This is option is only available for activities that can have offerings. | Learners can view Express Interest link for the activity in the registration panel. Learners can add their comments and provide a reason or their interest in the activity.<br><br>Training Coordinators can manage Learners that have expressed interest in the activity from the Express Interest view on the Activity Roster page. Training Coordinators can also send email notifications to interested Learners when building a new offering of the activity. |
| **Status** | Sets the status for the learning activity. Information only data. This setting does not control the behavior or functionality of KELMS | Training Coordinators can view the status on the Activity Summary page. |

**15.** Under Properties (in the center) **Click on Notes.** The Notes page opens to the right hand side of the screen.

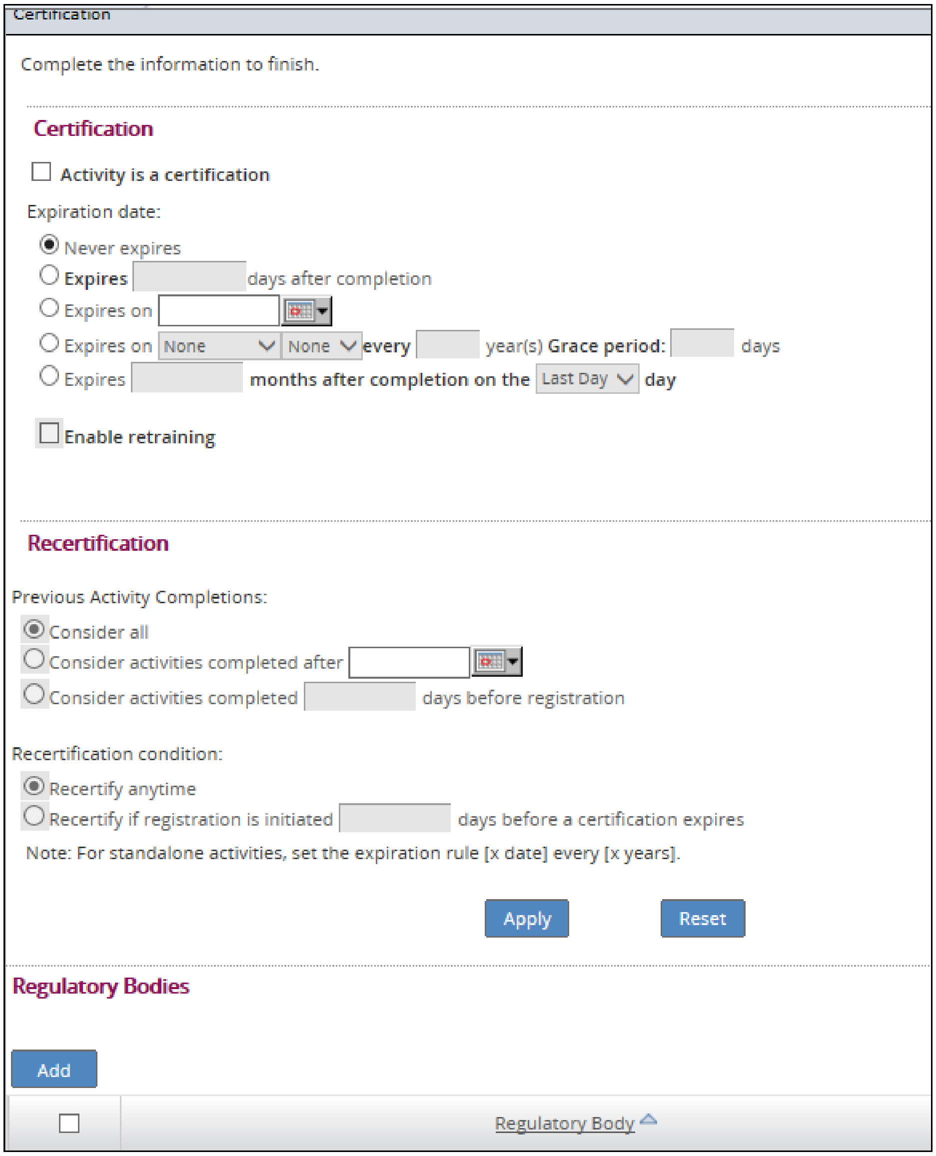
For training purposes, it's **<u>not necessary to enter any information</u>** in the **Notes** section but the below table will provide helpful information for future use. (Review the below screen shot)



| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Instructor Notes** | Enter notes for instructor who will teach the selected activity. You can use HTML tags to format the text. | Instructors: View instructor notes on the Instructor Schedule Activity Summary page. Notifications to instructors may include these notes. |
| **User notes** | Enter notes for users. You can use HTML tags to format the text | Learners can view user notes on the Activity Summary page for the learning activity. These notes appear in training-related notifications if included as macros in the notification template. |
| **Registration instructions** | Enter instructions for Learners at the time of registration. | Learners: View registration instructions in the registration panel at the time of registration.<br><br>Administrators: Control placement of registration instructions in the registration panel. These instructions can be translated into multiple languages; such instructions can be entered only for the parent level of an activity structure. |

**16.** Under Properties (in the center) **Click on Certification.** The Certification page opens to the right hand side of the screen.

For training purposes, **it's not necessary to enter any information in the Certification** page but the below table will provide helpful information for future use. (Review the below screen shot)


Certification
Complete the information to finish.
Certification
Activity is a certification
Expiration date:
Never expires
Expires days after completion
Expires on
Expires on None None every year(s) Grace period: days
Expires months after completion on the Last Day day
Enable retraining
Recertification
Previous Activity Completions:
Consider all
Consider activities completed after
Consider activities completed days before registration
Recertification condition:
Recertify anytime
Recertify if registration is initiated days before a certification expires
Note: For standalone activities, set the expiration rule [x date] every [x years].
Apply
Reset
Regulatory Bodies
Add
Regulatory Body

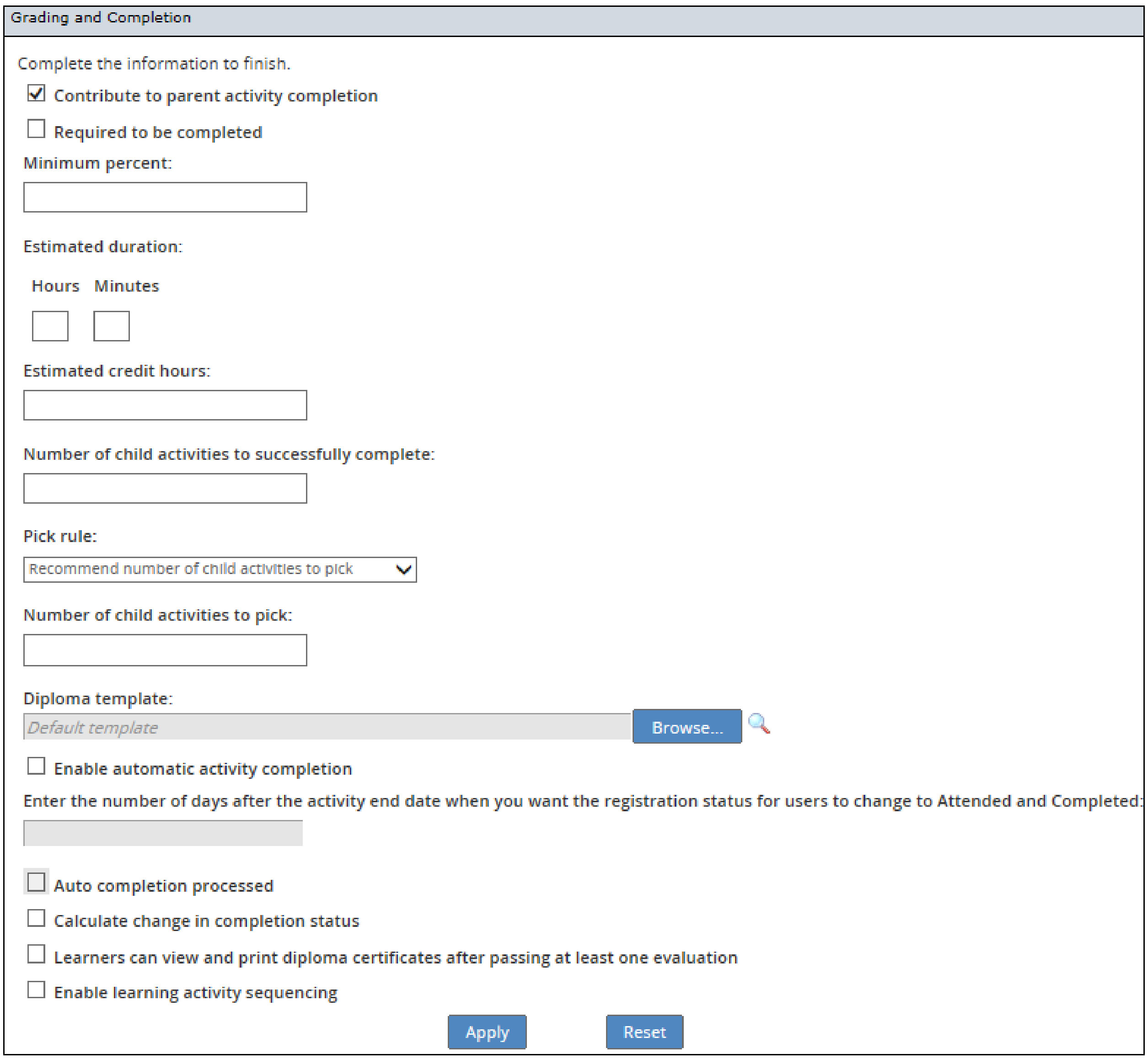
| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Activity is a certification** | Designates the learning activity as a certification. | Learners: View the learning activity as certification in Learner mode. A Certifications tab displays on the Home page if configured to display. |
| **Expiration date** | Specifies an expiration date for the certification.<br>**Never Expires:** Specifies that the certification is always valid after a user acquires it. By default, this option is selected for the Expiration date property.<br>**Expires ___ days after completion:** Specifies that the number of days for which the certification is valid after the user's completion date.<br>**Expires on:** Specifies the exact date on which the certification will expire for all users. | Training Coordinators: Specify the length of time a certification is valid by entering an expiration date. Any update made to this property holds valid for users who complete the certification after the last update made by the Administrator.<br>Learners: Receive an email notification message that says the certification is about to expire and another notification when it has expired. Also, the system changes the certification status for the user to Expired. |
| | **Expires on selected month and day every ____ year(s):** Specifies an expiration month and date relative to the date the certification is awarded to users. | Learners: Receive an email notification message saying the certification si about to expire and another notification when it has expired. Also, the system changes the certification status for the user to Expired. |
| | **Expires _______ months after completion on the _______day:** Specifies the number of months and days for which the certification is valid after the user's completion date. | Learners: Receive an email notification message that says the certification is about to expire and anther notification when it has expired. Also the system changes the certification status for the user to Expired. |
| **Enable Retraining** | Enables retraining for a Certification when there is a change in the completion criteria of the curriculum that requires Recertification. | Training Coordinators: When Administrators add new activities to an existing Certification and change the completion requirements, the Assignment Status of users who have already acquired the Certification changes to Retraining Required.<br>Learners: Learners view their Assignment Status for such activities as Retraining Required it he Training Analysis page and in the |

| | | |
|---|---|---|
| | | To Do List on the Home page. Learners also receive a new Certification Completion and Expiration Date. |
| **Previous Activity Completions** | Specifies completion date to be considered for previous activity completions. | |
| **Recertification Condition** | **Recertify anytime:** Select this if you do not want to restrict Learners by the Recertification condition.<br><br>**Recertify if registration is initiated _____ days before certification expires**: Honors previous activity completions if any (based on settings for Previous Activity Completion and Expiration rules) and registers users either to the entire Certification Curriculum or to only the newly-added activity. | Learners: Can register for new versions of subscribed activities and complete the Recertification Curriculum based on the settings configured for Previous Activity Completions. |
| **Add** | Assigns a regulatory body to the certification. This opens the Add Regulatory Body page. Click Next to update details about the regulatory body from the Update Activity Regulatory Bodies page. | Training Coordinators: For information purposes, this associates the name of an organization that offers certification or requires compliance with specific rules (such as FDA). This may appear in notifications and reports. |
| **Delete** | Removes the regulatory body association from the certification | |
| **Update Regulatory Bodies** | Updates notes specified for the regulatory body. | |

**17.** Under Properties (in the center), **Click on Grading & Completion.**
The Grading & Completion page opens to the right hand side of the screen.

**18. Enter Estimated Credit Hours and Duration.**
(***Reference your Student Card***)

**19. Click Apply.**



| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Contribute to parent activity completion** | Specifies that the activity will contribute to the Learner's result or outcome for the parent activity. Selecting this property means the activity is included when KELMS computes and stores the outcome for a Learner (completion, pass or fail, score). By default, this property is selected for all learning activities in an activity structure. | Training Coordinators: Each attempt a Learner makes to complete an activity has an "outcome" with the following components:<br>---Completion of the activity<br>---Success of the Learner (passed or failed)<br>----Degree of success in the form of a score<br>These three components can occur in any combination and are reported to the parent activity. Once a leaner has finished the "Number of child activities to successfully complete." And all "Required to be completed" attempts, the outcomes are summarized to produce an outcome at the parent level. |
| **Required to be completed** | Specifies that Learners must complete the activity. The Learner must have outcome from all required activities that contribute to parent activity completion before KELMS can compute the outcome for the parent activity., | Learners: The learning activity is automatically selected for Learners during registration.<br>The Learner's outcome for this activity contributes to the outcome of parent activity. |
| **Minimum percent** | Enter a value to automatically determine whether Learners successfully complete a learning activity or not. If a score is included in the outcome of an attempt to complete an activity, it will be compared to the minimum percent setting. When the score is equal to r greater than minimum percent, the success component is set to passed, otherwise the success for a Learner is set to failed. | Learners: View pass/fail status for the learning activity on Training Transcript page or the Activity Details page.<br>Training Coordinators: For classes that have a test or score, manually enter the score for a Learner on the Activity Roster page. For online courses that contain assessments, the score is automatically recorded. |
| **Estimated duration** | Specifies the estimated time it will take to complete the activity. | Learners: View the estimated duration on the Activity Summary page. |

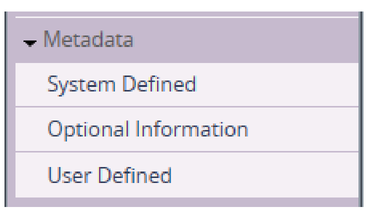
| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Estimated credit hours** | Specifies the number of credit hours Learners will attain by completing the activity. | Learners: View the estimated credit hours for the learning activity on the Training Transcript page. |
| **Number of child activities to successfully complete** | If the selected activity has child activities, this number defines how many child activities must have outcomes in order to successfully complete this parent activity. | Training Coordinators: This properly determines the number of child activities for which Learners must have specified outcomes, such as completion and success.<br>The number should be greater than or equal to the number specified for learning activities that are required to be completed. |
| **Pick rule** | Specifies the number of child activities that must be selected by the Learner before registration is permitted. | Learners: This property impacts registration selection for Learners.<br>Training Coordinators: The pick rule is directly related to the "number of child activities to pick" property. |
| **Number of child activities to pick** | Enter the number of child activities that Learners will be recommended or required to pick. | Learners: This property impacts the selections that Learners can make during registration, depending on the pick rule. |
| **Diploma Template** | Select a diploma template for the learning activity | Learners: View, print, or export their diplomas to PDF format from their Training Transcript or training Schedule pages after successfully completing a learning activity.<br>Training Coordinators: Specify a diploma template that will apply to a learning activity. Administrators can preview how the diploma looks when Learners export it to PDF; they can also export diplomas to PDF format from the activity roster.<br>Training Coordinators may also choose not to specify a diploma template for a learning activity. In such cases Learners do not get the option to view the diploma template. |

| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Enable Automatic Activity Completion** | Select this check box to automate the process of marking users with the status ***Registered*** and ***In Progress*** on the roster as ***Attended*** and ***Completed*** after a specific number of days after the end date of the scheduled activity. | Learners: Receive the Learning Activity Completion notification and Evaluation Learning Activity Completion Notification if an evaluation is associated with the learning activity.<br>Training Coordinators can use this option to automate the process of marking users with the status ***Registered*** and ***In Progress*** on the roster as ***Attended*** and ***Completed*** after a specific number of days after the end dated of the scheduled activity only.<br>Administrators cannot automate the process of marking users as Attended and Completed for Quick Assessment and CBT (online/web based) activity types.<br>Training Coordinators also cannot automate the process of marking users as Attended ad Complete if the activity is cancelled and if the activity does not have an end date. |
| **Auto completion processed** | Indicates whether the activity has been processed by SumTotal's activity auto completion scheduled job. By default, this check box is not selected. Once the schedule job processes the activity, the check box is selected automatically; the scheduled job ignores this activity the next time it runs. | Training Coordinators: If you update the property "Enter the number of days…" then, ensure you clear this check bod so that the activity auto completion scheduled job processes this activity when it runes the next time. |
| **Calculate change in completion status** | Select this check box when there is change in the completion criteria on a curriculum that requires Recertification. | Learners: Receive the Recertification Activity Change notification.<br>Training Coordinators: The change in completion criteria may result due to new activities added or when an activity is deleted. |

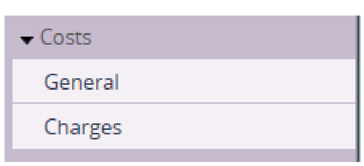
| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Learners can view and print diploma certificates after passing at least one evaluation** | Select this checkbox to enable a Learner to view and print diploma certificate, only after passing at least one evaluation if multiple evaluations are associated to a learning activity | Learners: Learners can view and print diploma certificates only after successfully completing an activity and submitting at least one evaluation.<br><br>Training Coordinators: If you enable the property "Learners can view and print diploma certificates after passing at least one evaluation" then, ensure that you associate at least one evaluation to the learning activity.<br><br>Note: As a best practice, specify a description, asking Learners to complete at least one evaluation to view and print diploma certificate whenever you enable the "Learners can view and print diploma certificates after passing at least one evaluation" check box. |

For training purposes, **it's not necessary to enter any information in the Translated Properties** page but the below table will provide helpful information for future use.

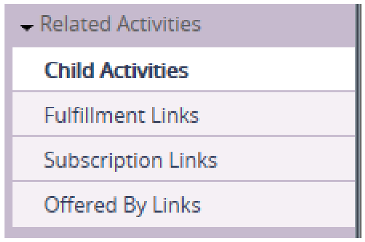
We will be **skipping over the Metadata Category**. This category displays optional information about a learning activity that can be used for reports or search criteria. Learners can search for learning activities based on the metadata associated with an activity.




We will be **skipping over the Costs Category**. This category displays the different kind of costs you can assign to a learning activity.




For training purposes, **it's not necessary to enter any information in the Related Activities Category**. This category displays information in these subcategories.



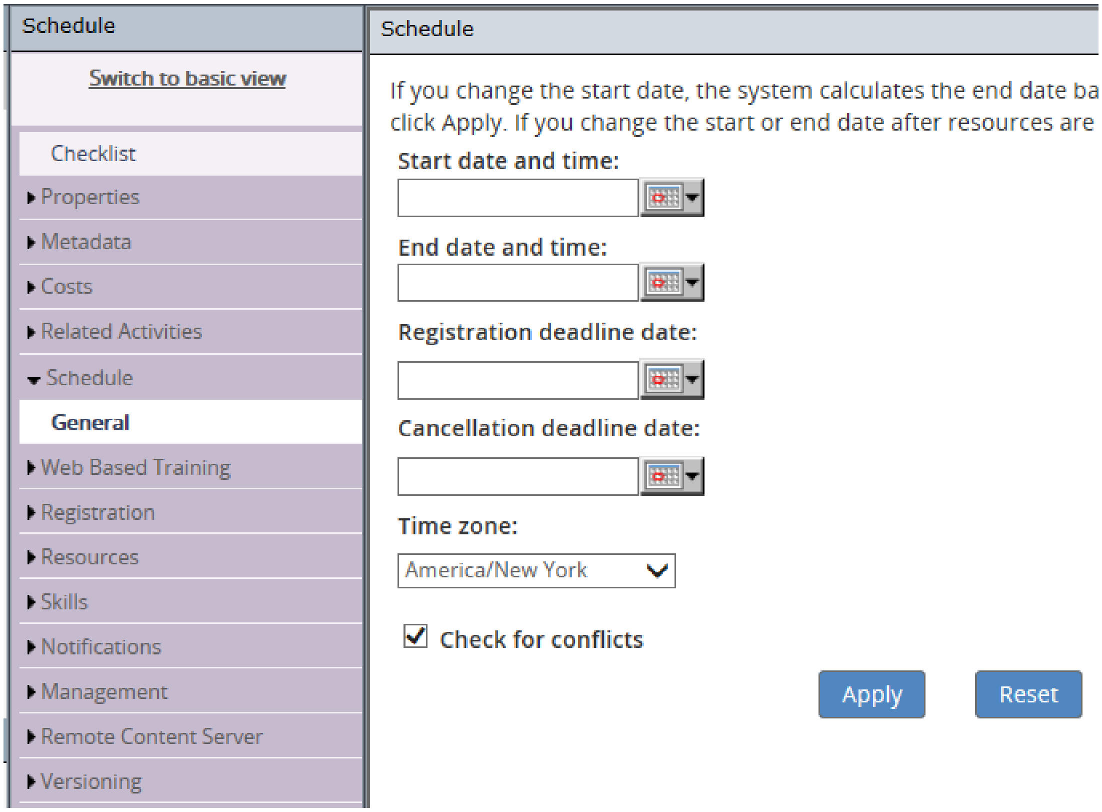

- **Child Activities** – if it is a complex learning activity i.e. Curriculums that includes one or more separate components such as topics, you can view a list of the activities that belong to the parent activity.

- **Fulfillment links** – a User can complete a single training requirement through a fulfillment link. This type of link allows an Administrator to create multiple ways to fulfill a single requirement.

- **Subscription Links** – A Subscription link allows an existing learning activity to be available in another activity structure. Subscription links are generally used to connect Activities to Curriculums.

- **Offered-by Links** – An offered-by link is created automatically when you create a new activity which uses a activity template that has the offered-by option selected. By default, the ILT course activity type is offered by ILT classes (the link is automatically assigned when creating an ILT class). The offering fulfills the training requirement of the selected activity.

**20.** Under Properties (in the center) **Click on Schedule, then Click on General.**




**21. Add the start & end date and time first**. (Refer to your Student Card)

Pay attention to the year. If your end date is earlier than your start date, you will not be able to enter them.

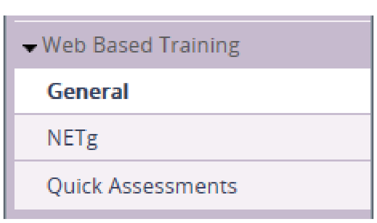
Setting or changing the start & end date and time may alter the date and time of parent or child activities.

**22. Choose the time zone** for your class. (Refer to your Student Card)

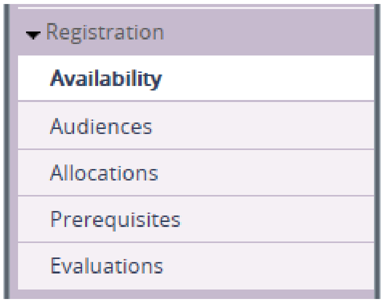
**23.** Once all the information has been entered, **Click Apply**

| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Start Date & Time** | Enter start date and time for the activity. | Learners: View the start date and time while registering for the activity. |
| **End date & Time** | Enter end date and time for the activity | Learners: View the end date and time while registering for the activity. |
| **Registration deadline date** | Enter last date for registering for the activity | Learners: View the registration deadline date in the Activity Summary page.<br>Will not be able to register for the activity after the registration deadline date. |
| **Cancellation deadline date** | Enter last date for canceling the registration for the activity | Learners: View the cancellation deadline date in the Activity Summary page.<br>Not able to cancel after the cancellation deadline date. |
| **Time Zone** | Select the time zone for the location of the activity | Learners: View the time zone while registering for the activity. Any scheduled activity will e adjusted automatically for people in other time zones so everyone sees the starting time and date in their own local time zone. |
| **Check for conflicts** | KELMS checks to find if a user has a conflict between activities that have the same start and end dates. | Learners will be allowed to register for one activity during a specified time and date.<br>With the proper permissions you can override scheduling conflicts. |

*For training purposes, it's not necessary to enter any information in the Web Based Training Category*. This category displays properties that you can configure for training that is delivered online. This information will be covered in more detail in another section.

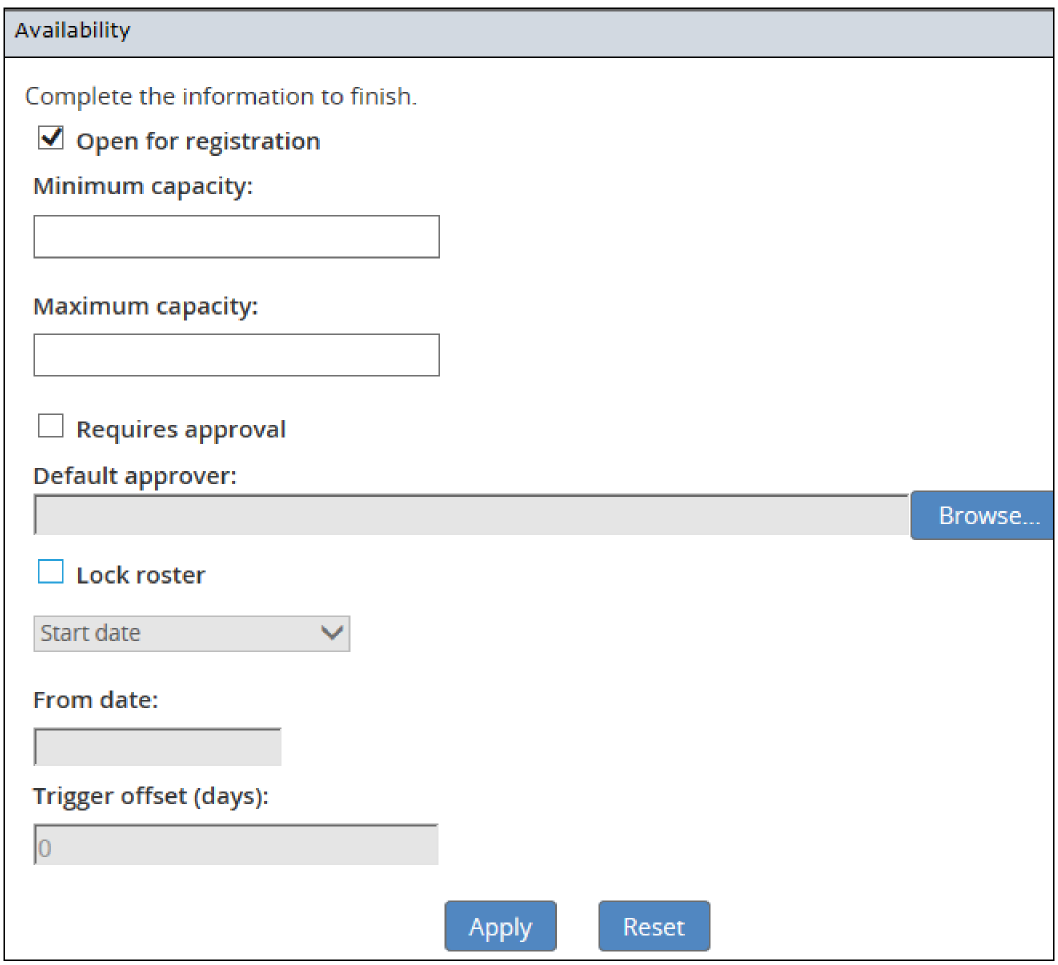


Under Properties (in the center) **Click on Registration.** This category displays a variety of registration options that you can set for a learning activity.




**24. Click on Availability.**

**25. Enter the Maximum Capacity.** (Refer to your Student Card)

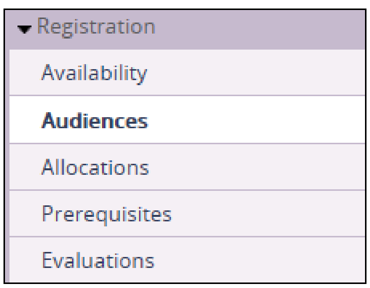



**26. Click Apply**

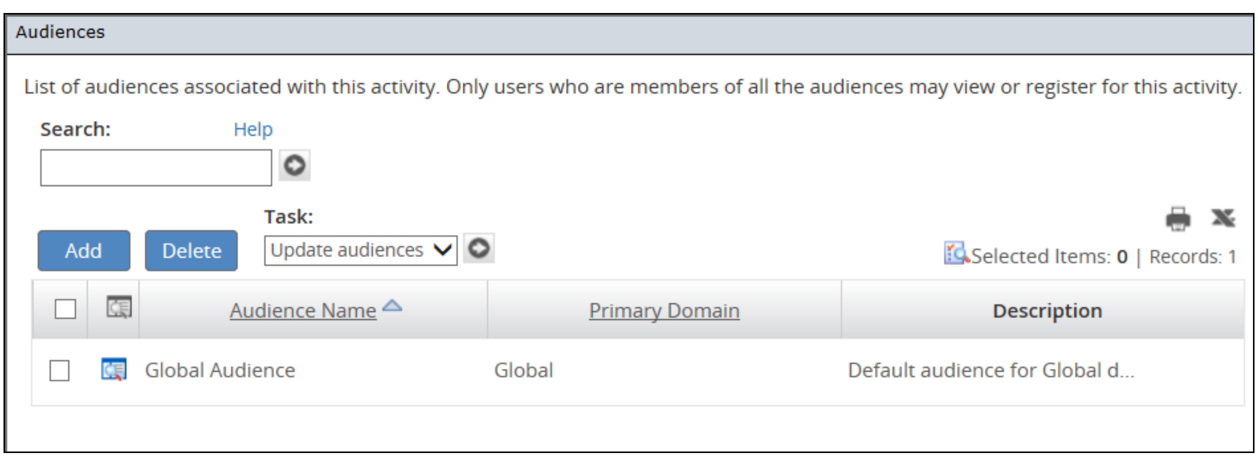
| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Open for registration** | Indicates that users can register for this activity. | Learners: Can register for an activity when this property is selected. |
| **Minimum capacity** | Enter the minimum number of people who must register for this activity. | Training Coordinators: this information will help you determine whether to provide a training event or to cancel it. |
| **Maximum capacity** | Enter the maximum number of people who can register for this activity. | Learners: When a Learner tries to register for a learning activity that is already filled to the maximum capacity, the Learner is added to a waiting list. An exception is made for any Learner who has the permission "Override a capacity problem and overbook a learning activity enabled. |
| **Requires approval** | Determines whether this activity requires approval from an authorized approver before a Learner can register for this activity. | Learners: if approval for registration is required, a Learner who registers for a learning activity is routed to a waiting list and the necessary approval records are created. After an approver grants the necessary approval, the Learner is registered for the learning activity. |
| **Default approver** | Specifies a default approver who makes the training level approval decisions for registration requests. | Learner receives notification for registration pending request.<br>Approver: Receives notification for registration approval request.<br>Training Coordinator: must enable training level approver settings. |
| **Lock Roster** | Restricts users from updating or adding users to training rosters after a certain period of time. You can override this restriction if you have the permission. | **Once you enable the Lock roster option for an activity:**<br>Training Coordinators and Instructors cannot add users to roster or update users' status on roster. However they can send email to users from the roster.<br>Learner: Cannot register or cancel registration for the activity.<br>Manager: Cannot register or cancel registrations of their direct |

| | | |
|---|---|---|
| | | reports for the activity<br>Approver: Cannot approve pending requests for the activity<br>Waitlisted user: Cannot be confirmed.<br>**Note:** When the roster is locked, the domain level settings for Auto Activity Completion and Cancel registration of inactive users take precedence. |
| **Trigger Days** | Enter the number of days after the target date that you wish the activity roster to be locked. You can specify this option only for Start date, End date, and Registration deadline date. | |

**27. Click on Audiences** (under Registration Properties). This allows you to limit who sees the training. *For this training exercise we will not enter any information*.

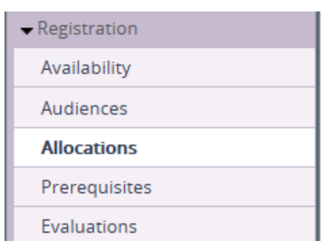



This is where you would select the audience that you wish to be assigned to this class. **Your domain audience is the default audience when creating a class**.

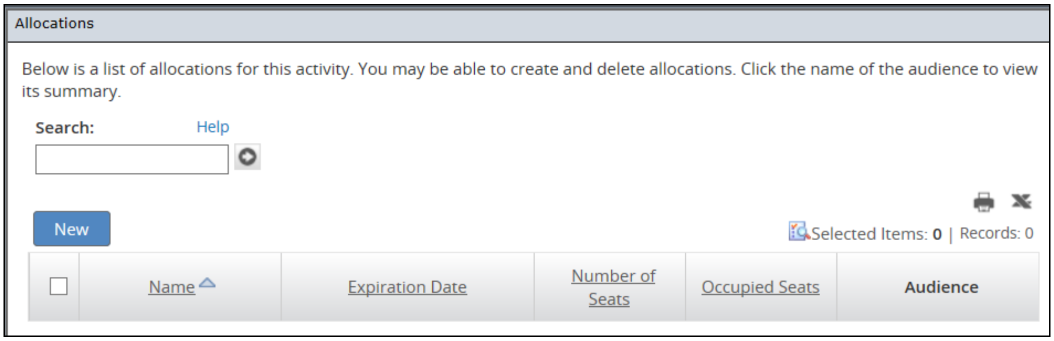


| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Add** | Assigns an audience to a learning activity and allows you to specify View and Register permissions for the audience:<br><br>If you select the View and Register check boxes, Learners will be able to see the activity in Learner mode as well as register for the activity.<br><br>Child activities inherit the audience assigned to the parent activity. Audiences specified at any child level are assigned in addition to the parent's audience. | If multiple audiences are specified for an activity, users must qualify as members of all of the audiences in order to view or register for the activity in Learner and Manager modes.<br><br>If only the View checkbox is selected, Learners will see the activity. The message "No registration options" will display while trying to register for an activity that does not allow registration. |
| **Delete** | Removes an audience association with a learning activity<br><br>You cannot remove an audience inherited from a parent | |
| **Task** | Updates the visible permissions and register permissions for audiences associated with a learning activity. | |

28. **Click on Allocations** (under Registration Properties). For this training exercise we will not enter any information.

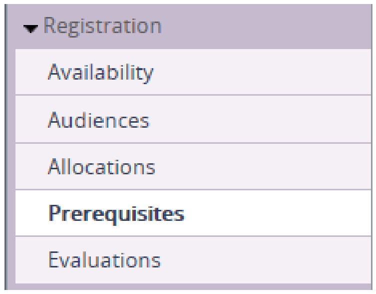



This is where you can set the allocations for the class and reason for the seats that are reserved.




| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Name** | Enter a name for the allocation | Training Coordinators: The name of the allocation can be used to describe the reason the seats are reserved.<br><br>Learners will not see the allocation name. |
| **Expiration Date and Time** | Specifies a date and time when the seats reserved by an allocation expire, which opens up the unoccupied seats for other members of the audience. | Learners: Can register for an activity and take allocated seats until he specified expiration for the allocation. If an expiration date is set for the allocation and the date expires, all leaners who belong to the original audience for the learning activity can register for it. |
| **Number of seats** | Enter the number of seats for the allocation | Training Coordinators once an allocation is added the maximum capacity setting is not used. |
| **Add** | Assign an audience to the allocation | Learners: If Learners belong to the audience assigned to an allocation, they can register for this learning activity. If a Learner is not a member of the audience assigned to the allocation, the registration request is placed on the waiting list.<br><br>If you add more than one audience to an allocation, Learners must qualify as a member of all the audiences. |

***29.* Click on Prerequisites** (under Registration Properties*). For this training exercise we will not enter any information.*



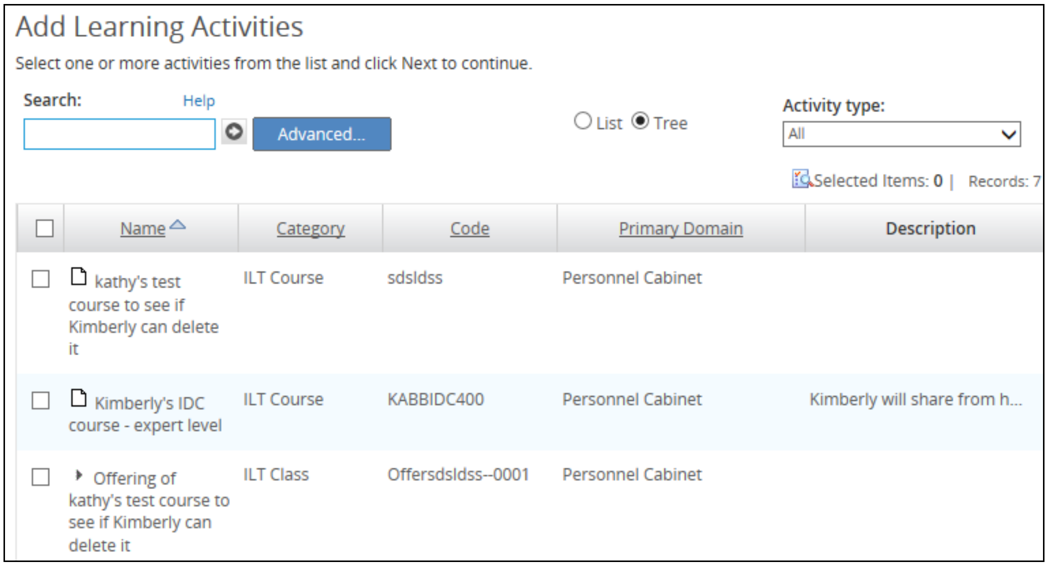

This is where you can list prerequisites for this activity.


**Note:** Consider additional settings for Soft Prerequisites at the domain level for wait listed users and users pending approval.

| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Add** | Assigns a prerequisite to the current learning activity.  This opens the Add Learning Activities page. | Learners:  if a soft prerequisite is added, Learners must register for the prerequisite before registering for the learning activity.   If a Hard prerequisite is added, Learners must complete the prerequisite before registering for the learning activity.<br><br>For any Learner who has not registered for or completed a prerequisite, the system blocks the registration or issues a warning, depending on the permission assigned to the Learner. |
| | On the Add Learning "Activities page, select a learning activity and click Next.  This opens the Add Activity Prerequisite page. | |
| **Delete Icon X** | Removes the prerequisite association from the learning activity | |
| **Update Prerequisites** | Updates the prerequisite settings. | Learners:  View the updated requirements for the prerequisite in Learner mode. |

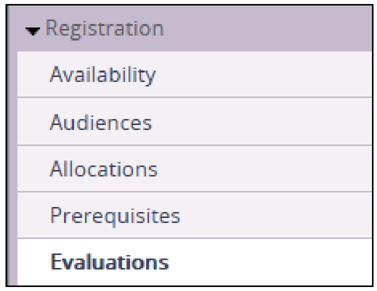
**Add Activity Prerequisites**

- Soft prerequisites only require registration.
- Hard Prerequisites require completion with minimum grade, if grade is configured.



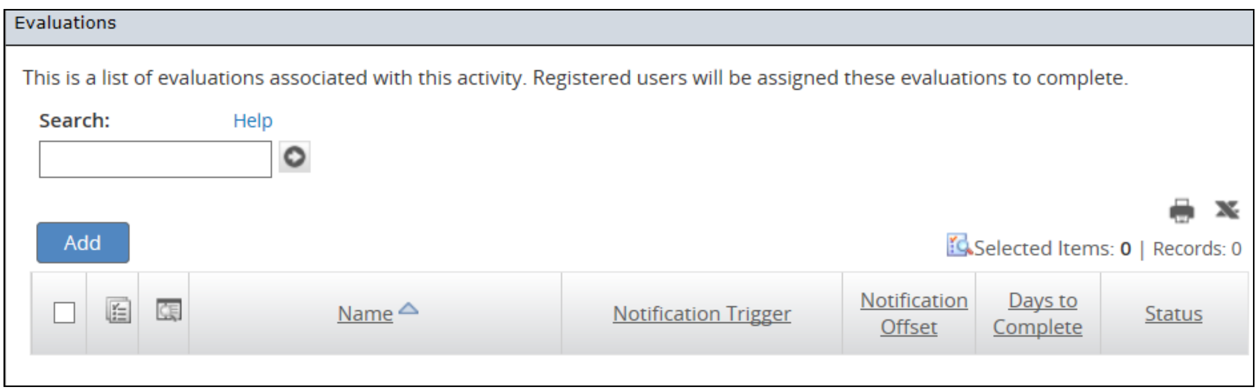

| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Prerequisite Name** | Displays the name of the activity that is a prerequisite. | |
| **Soft Prerequisite** | Selection of the check box configures the activity as a Soft Prerequisite. | Learners: During registration, the system checks whether the Learner has registered for the prerequisite. |
| **Hard Prerequisite** | Specifies a minimum grade that Learners need to achieve in order to complete the prerequisite successfully. | If you do not select the Soft Prerequisite check box, the activity is configured as a Hard Prerequisite.<br>If you specify the minimum grade as "none", Learners need only complete the prerequisite without considering the grade requirements, in order to register for and complete the main activity.<br>Learners: During registration, the system checks whether the Learner has completed the prerequisite and achieved the minimum grade, if configured. |

***30.* Click on Evaluations** (under Registration Properties). *For this training exercise we will not enter any information.*




Evaluations contain questions that are answered by participants in a learning activity. An evaluation can be created in Administrator mode and assigned to an activity.

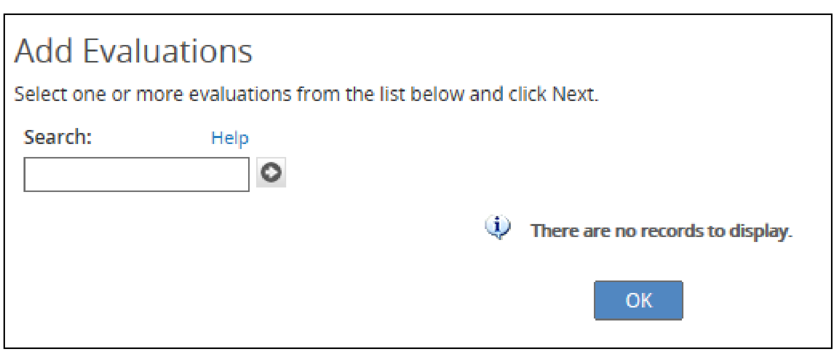
This is where you will go to find a list of evaluations associated with this activity. Registered users will be assigned these evaluations to complete.



| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Add** | Assigns an evaluation to the current learning activity. This opens the Add Evaluation page. | Training Coordinators: Configure properties for an evaluation to allow Learners to see the evaluation when they register for, begin, or complete the learning activity associated with the evaluation.<br><br>Learners: View the evaluation on Learning Activity Evaluations page available from the Learn menu. Depending on how the evaluation is set up, it will be available when Learners register for, begin, or complete an associated learning activity. |
| **Delete Icon X** | Removes the evaluation association to the current learning activity. | Learners will not see the evaluation. However, Learners to whom evaluations have already been assigned will continue to be able to view the evaluation. |
| **Update evaluation** | Updates the properties for the evaluation | |
| **Box icon** | Displays the completed evaluation report | |

**Add Evaluations Page**

Registered users will be notified to take this evaluation based on your selection below.



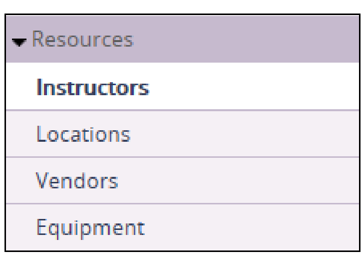
| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Notification Trigger** | An email message that specifies when the evaluation will be available to the Learner. | Learner: Receives a notification about the evaluation. KELMS sends this notification in response to the trigger event that is chosen by the Training Coordinator. |
| **Trigger Offset (days)** | Enter the number of days before or after the notification trigger event when the evaluation should be assigned to Learners. | Learner receives a notification about the evaluation at the event specified in the notification trigger field. |
| **Days to complete evaluation** | Enter the number of days a Learner will have to complete and submit an evaluation. | Learner Receives a notification specifying the number of days to complete and submit the evaluation. |
| **Activity Evaluation date** | Identifies when an evaluation was added to the learning activity. | Learner: Gets to view evaluations when they receive evaluation-related notifications.<br>Administrator: Must associate evaluation to the activity by providing an Activity Evaluation date that is earlier than the earliest registration date of users who are already on the activity roster. |

**31. Click on Resources Category**

This category displays the resources needed for training events, such as instructors, locations, vendors, and equipment.

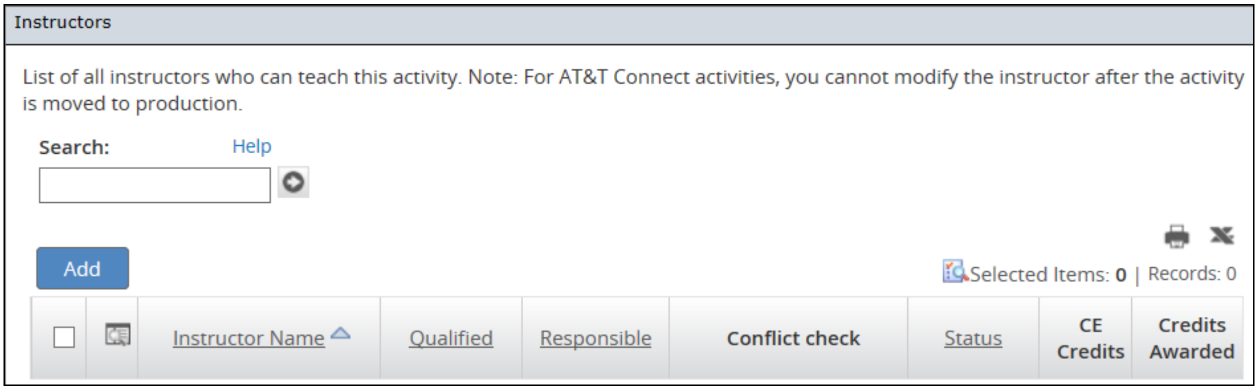
**32. Click on Instructors (under Resources Category)**

A list of all instructors who can teach this activity can be found here.



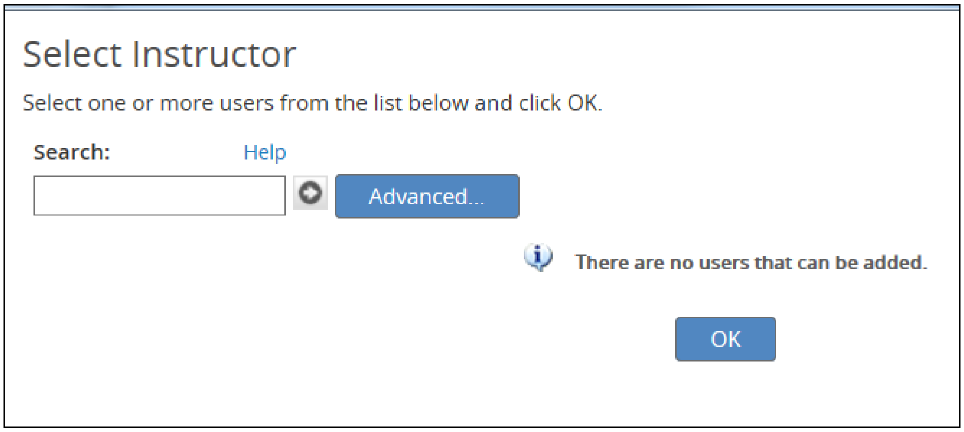
This is where you will determine if you want the Instructor(s) to be responsible for the activity.

**33. Click the Add** button to add an instructor to this class.




| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Add** | Assigns one or more instructors to a learning activity. This opens the Select Instructor page.<br><br>On the Select Instructor page, select an instructor and click Next to open the Add Activity Instructors page. | Instructors: View the assigned activities on the Instructor Schedule page in Learner mode.<br><br>Training Coordinators: Must assign a responsible instructor to teach an activity.<br><br>If resource approval is required, the approver assigned to the resource is sent a notification and required to approve the resource before it is finalized. KELMS checks to see if there is a conflict. |
| **Delete (Icon X)** | Removes the instructor association from an activity | -- |
| **Update Instructor** | Updates properties such as qualified or responsible for an instructor. | |

**Select Instructor Page**




34. **Check the box** beside the instructor name you wish to add.

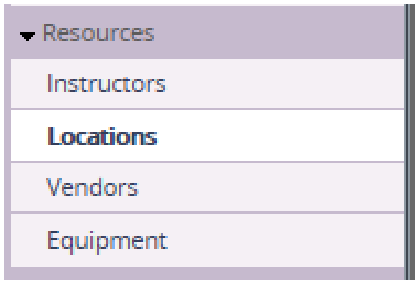
35. **Click Next**

36. **Verify** that you have the correct Instructor name and **Check Qualified and/or Responsible.**

**Note:** the instructor name is added and there are no conflicts.

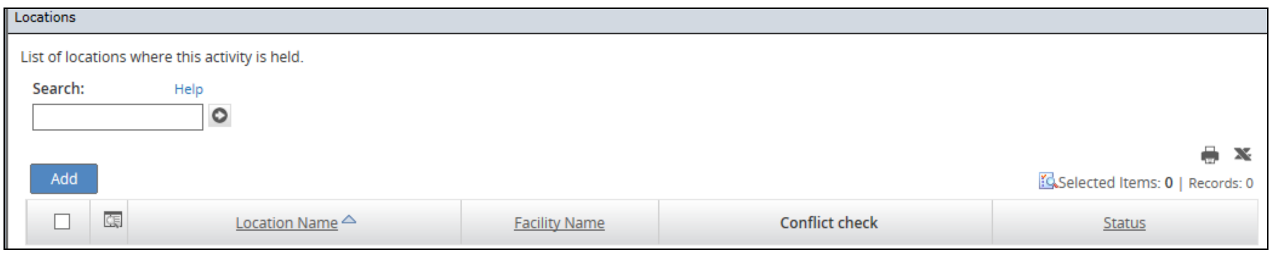
| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Instructor Name** | Displays the name of an instructor | -- |
| **Qualified** | Specifies an instructor as qualified to teach a learning activity. This allows a pool or a set of qualified people to be assigned. | Administrators: Select one or more qualified instructors who are qualified to teach a particular learning activity. Qualified instructors will not see this assignment on their instructor Schedule in Learner model, but they are shown as qualified to teach the learning activity in Administrator mode. |
| **Responsible** | Specifies the instructor who is responsible for teaching an activity. You can select a responsible instructor from the pool of qualified instructors for a specific learning activity. | Responsible instructor: Has access to the activity roster with authority to add users and enter status and outcome data.<br>The Instructor Schedule in Learner mode shows the assignment of learning activities to the responsible instructors. |

***37.*** **Click on Locations** (under Resources Properties).




This is where you will enter information for where the activity will be held.

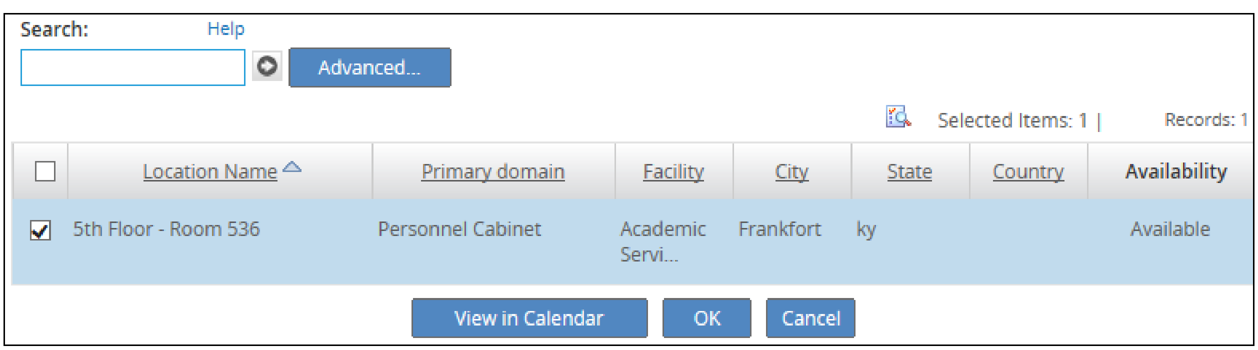
**38. Click Add**




Here you can search for one or more resources from the list below.

**39. Click the box** beside the location you wish to select.

**40. Click Ok**.

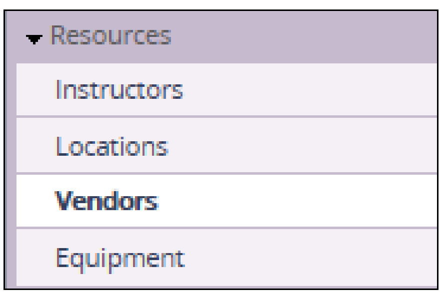



You have now added the training location to the Activity.

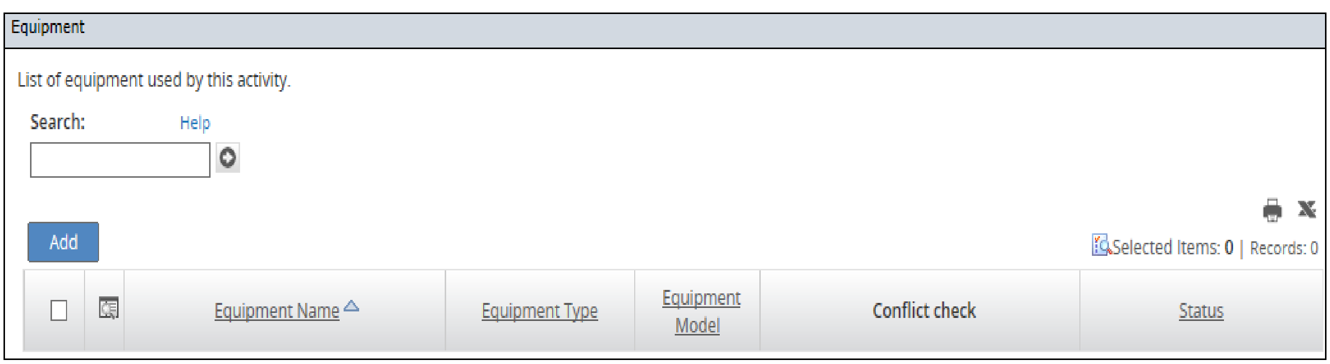
Note there are no conflicts found.

| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Add** | Assigns a location to a learning activity. This opens the Select Location page, which allows you to choose the location where the training will take place. | Learners: View the location name on the Activity Summary page in Learner mode. Also, a notification is sent to all registered users about the locations and facilities.<br><br>Training Coordinators: If resource approval is required, the approver assigned to the resource is sent a notification and is required to approve the resource before it is finalized. The system checks if there is a resource conflict with other activities. |
| **Delete (Icon X)** | Removes the location association to the learning activity | -- |

***41.* Click on Vendors** (under Resources Properties). *For training purposes we will not enter any information in this section.*

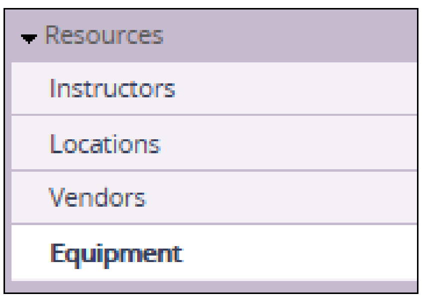



*This is where you would select or add a vendor associated with this Activity.*

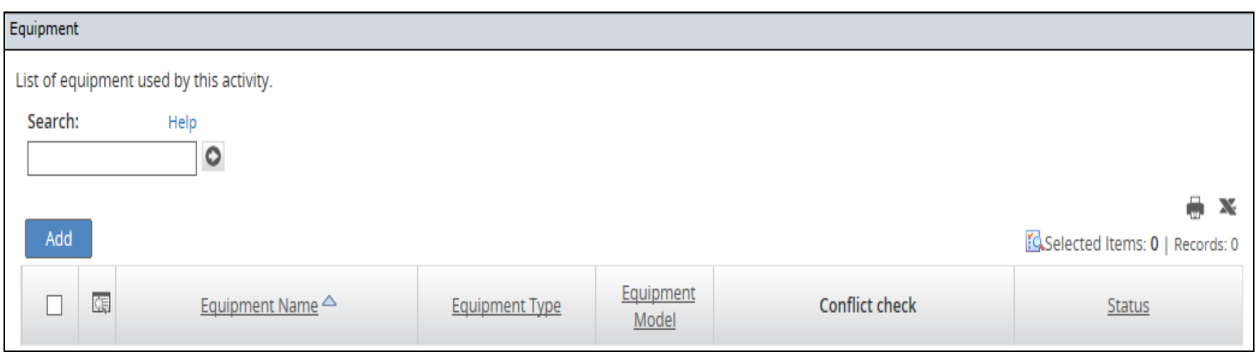


| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Add** | Assigns a vendor to a learning activity.  This opens the Selected Vendor page, where you can choose from the vendors entered in the system.<br>Vendors are the companies, organizations, or individuals that provide training.  (*An example might be TANDAM*) | Learners: View the vendor name on the Activity Summary page in Learner mode. |
| **Delete (Icon X)** | Removes the vendor association to the learning activity | -- |

***42.* Click on Equipment** (under Resources Properties). *For training purposes we will not enter any information in this section.*



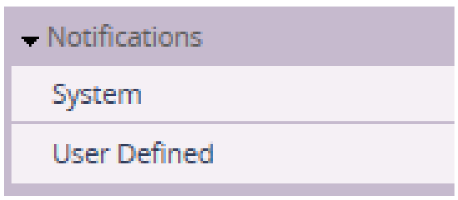

*This is where you would add the equipment needed for this Activity.*



| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Add** | Adds equipment that is required for teaching a particular learning activity. This opens the Select Equipment age. | Training Coordinators: if resource approval is required, the approver assigned to the resource is sent a notification and required to approve the resource before the assignment is finalized. The system checks if there is a resource conflict with other activities. |
| **Delete (Icon X)** | Removes the equipment association with the learning activity | -- |

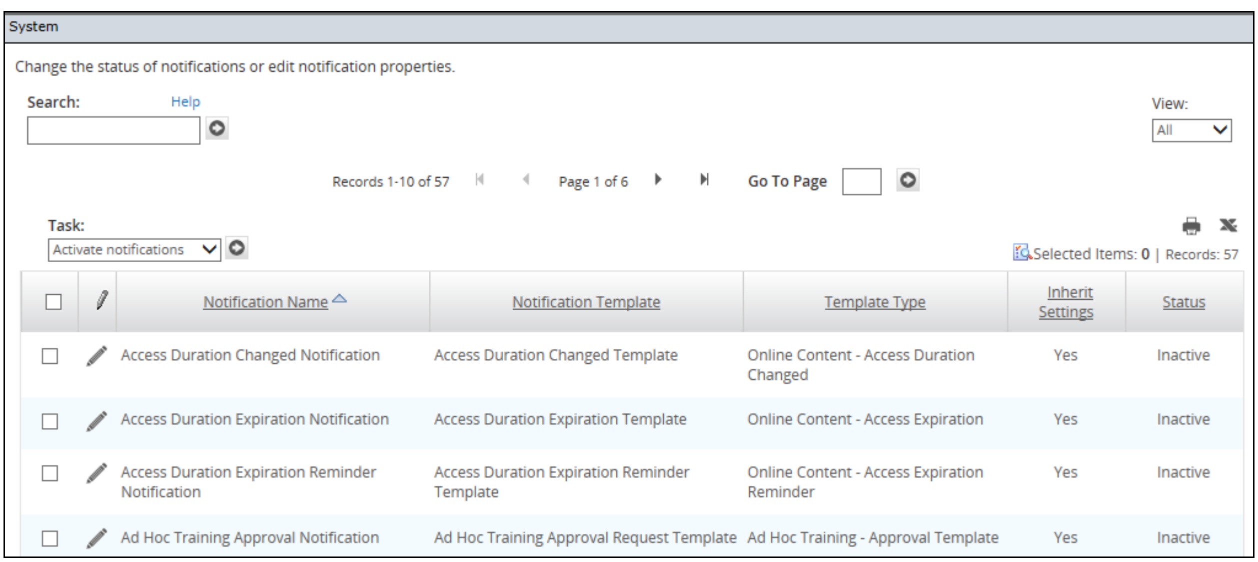
***43.*** **Click on the Notification Category.**

This section displays the email notifications that you can assign to a learning activity. The active messages will be sent automatically by KELMS.



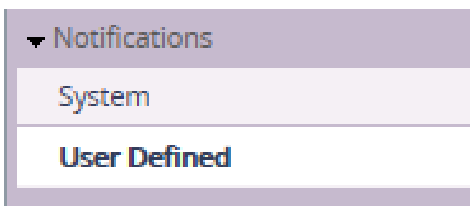

**44. *Click on System Properties*** *(under Notifications).*

This section displays the email notifications that are assigned to a learning activity. You can change the status of notifications or edit notification properties. The active messages will be sent automatically by KELMS.

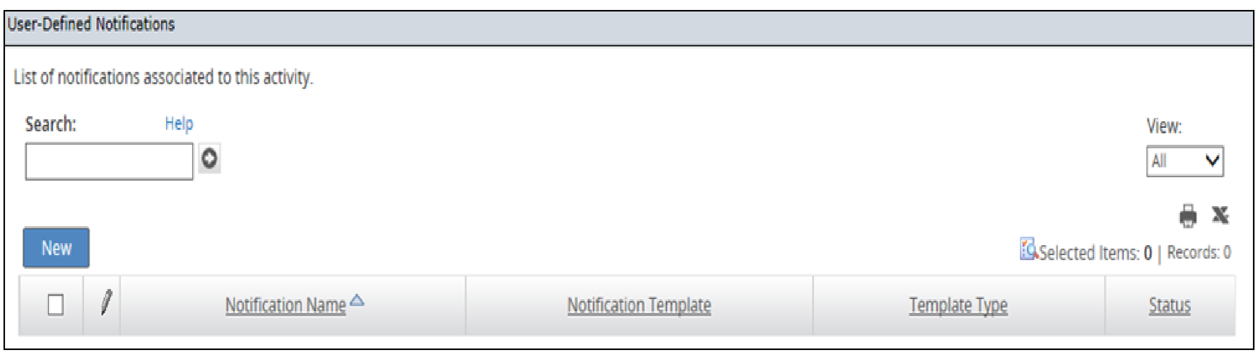


| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Active/Inactive Notifications** | Activate or inactivate selected notification. An inactive notification will not be sent. | Learners: Receive the notifications that are active.<br>Training Coordinators: Can choose which notifications will be sent out. |
| **Edit** | Update the Form address, Recipients, Additional Recipients, Scheduling for the notification. | -- |

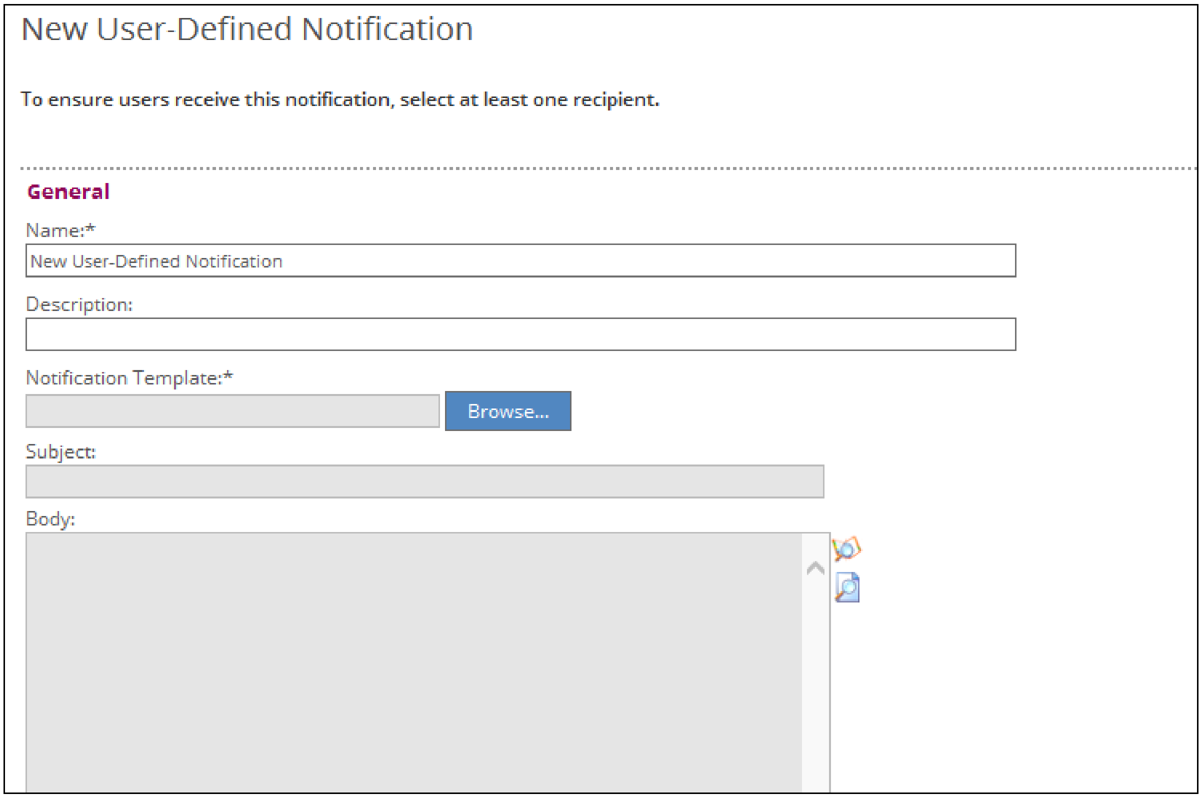
***45. Click on User Defined Properties*** *(under Notifications). For training purposes, we will not enter any information.*




**User-Defined Notification Page**




| Properties | Description | Impacts and Considerations |
|---|---|---|
| **New** | Adds a customized notification for a learning activity. This opens the New user-Defined Notification page. | -- |


New User-Defined Notification

To ensure users receive this notification, select at least one recipient.

General

Name:*

New User-Defined Notification

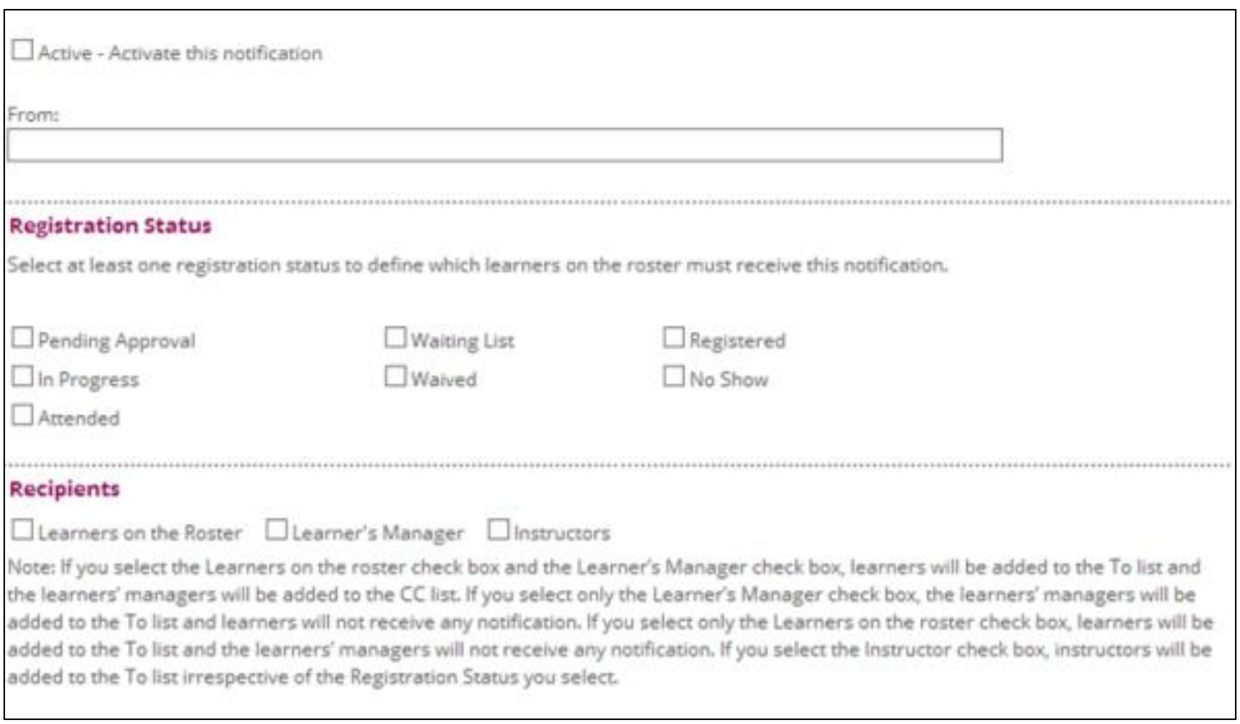
Description:

Notification Template:*

Browse...

Subject:

Body:


Active - Activate this notification

From:

Registration Status

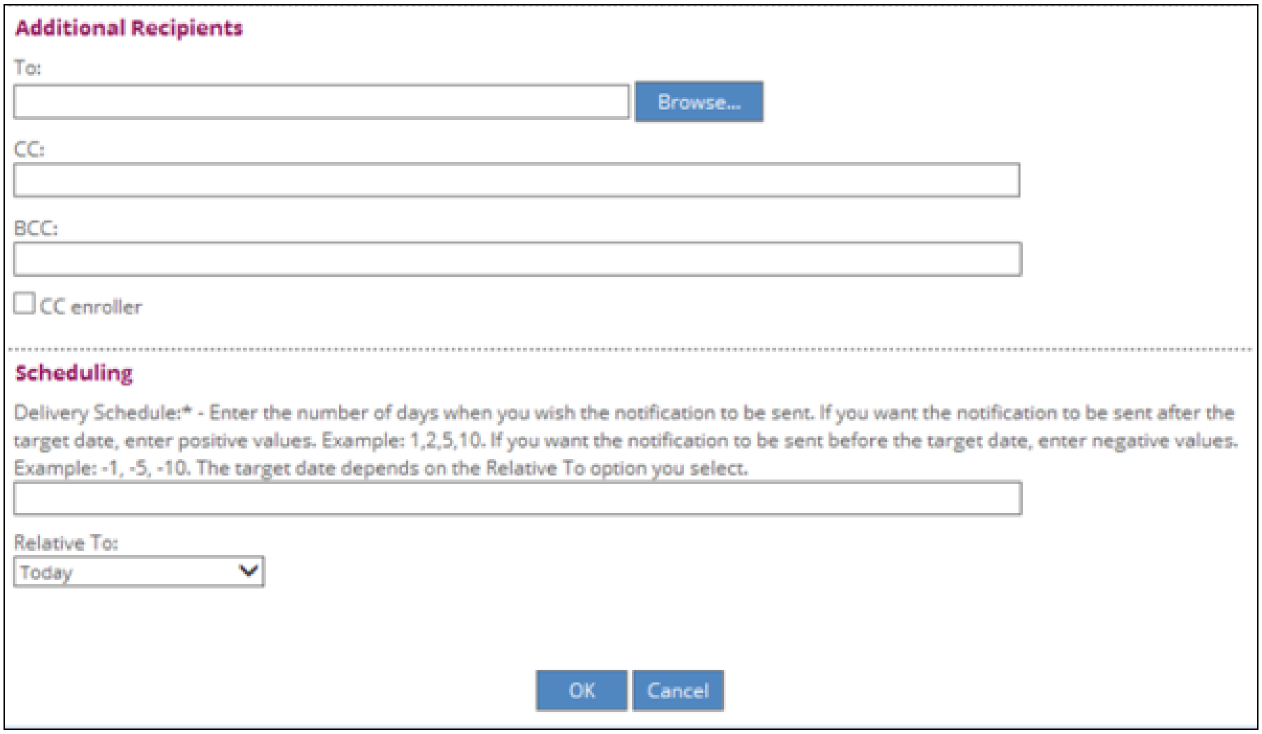
Select at least one registration status to define which learners on the roster must receive this notification.

Pending Approval
Waiting List
Registered
In Progress
Waived
No Show
Attended

Recipients

Learners on the Roster
Learner's Manager
Instructors

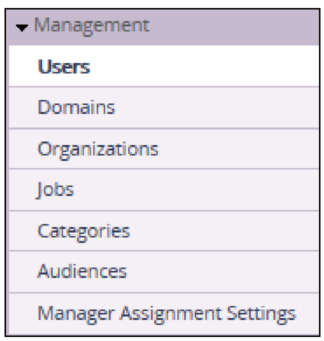
Note: If you select the Learners on the roster check box and the Learner's Manager check box, learners will be added to the To list and the learners' managers will be added to the CC list. If you select only the Learner's Manager check box, the learners' managers will be added to the To list and learners will not receive any notification. If you select only the Learners on the roster check box, learners will be added to the To list and the learners' managers will not receive any notification. If you select the Instructor check box, instructors will be added to the To list irrespective of the Registration Status you select.


Additional Recipients
To:
Browse...
CC:
BCC:
CC enroller
Scheduling
Delivery Schedule:* - Enter the number of days when you wish the notification to be sent. If you want the notification to be sent after the target date, enter positive values. Example: 1,2,5,10. If you want the notification to be sent before the target date, enter negative values. Example: -1, -5, -10. The target date depends on the Relative To option you select.
Relative To:
Today
OK
Cancel

| Properties | Description | Impacts and Considerations |
| --- | --- | --- |
| **Name** | Enter a name for the under-defined notification. | Appropriate recipients: View the name of title |
| **Description** | Enter a description for the user-defined notification | -- |
| **Notification template** | Allows you to browse for an existing notification template or create a new template.<br>To create a new template, click New on the Select Template page. | Training Coordinators: Define the subject and body message for the notification. |
| **Subject** | Displays the subject of the user-defined notification. By default, the subject is populated from the notification template. You cannot modify the subject text. | Appropriate recipients: View the message in the notification they receive. |
| **Body** | Displays the body message for the user-defined notification. By default, the body message is populated from the notification template. You can modify the body message. | Appropriate recipients: View the message in the notification they receive. |
| **Active** | Activates the notification. Notification messages are not sent if the Active check box is cleared. | Specified recipients. Receive appropriate notifications. |
| **From** | Enter an email address to specify who is sending the notification. | Appropriate recipients: view the address from where the notification has arrived. They can reply to the same address |
| **Recipients** | Select the following check boxes to specify recipients such as:<br>**Roster** – Users who are listed on the activity roster for a learning activity.<br>**Instructors** – Responsible instructors associated with this learning activity.<br>**Waiting List** – Users who are on the waiting list for the learning activity. | Appropriate recipients: View and receive the notification. |

| | | |
|---|---|---|
| **Additional Recipients** | **Browse** to add users in the system.<br>**Enter** users in the CC and BCC List<br>**Select** the Check box to add enrollers to the CC list. | Recipients: View the notification |
| **Scheduling** | Enter the number of days before or after the target date when you want the notification to be sent. | Recipients: Receive the message on the specified date. |
| **Relative to** | Select a scheduling option for the notification to be sent, such as:<br>**Today**<br>**Activity Start Date**<br>**Activity End Date** | Recipients: Receives messages on scheduled dates. |

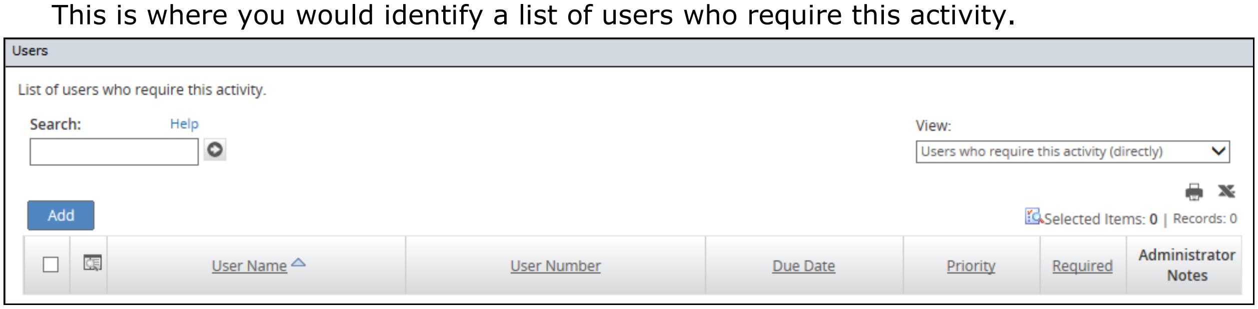
***46. Click on the Management Category***. *(For training purposes, we will not enter any information.)*




This section allows you to assign a learning activity to users, domains, organizations, jobs, categories, and audiences.

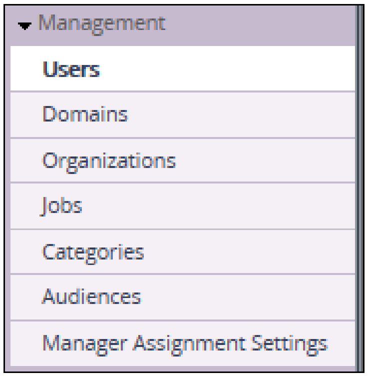
**47.** ***Click on the Users Properties,*** *under Management. For Training Purposes, we will not enter any information in this section.*

This is where you would identify a list of users who require this activity.

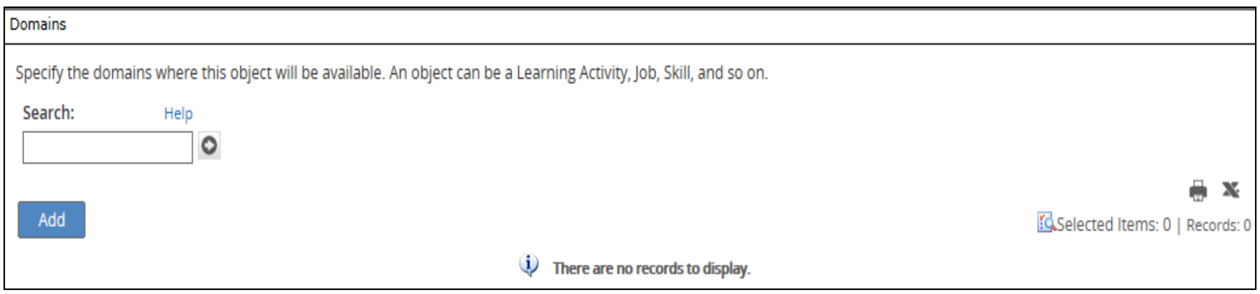


| Properties | Description | Impacts and Considerations |
|---|---|---|
| **View** | Select from the drop-down list:<br>**Users who** require this activity (directly)<br>**Users who** require this activity by job<br>**Users who** require this activity by organization<br>By default, you will see the users who require this activity through direct assignment. | Administrators: Filter the list of users who are assigned this activity. |
| **Add** | Assigns users to the learning activity. This opens the Select Users page. | Learners: View the learning activity on their Training Analysis page as either required or recommended.<br>Administrators: When assigning a learning activity to users, they must be part of the audience to see the assignment. |
| | On the select users page, select users by domain, organization, job, audience, Manager, and viewable users and click Next. This opens the Add Activity Users page. | -- |
| **Delete** | Removes the user association to a learning activity | -- |
| **Update users** | Updates properties such as required or recommended, due date, priority, Learner assignment notes, and Administrator notes. | -- |

**48. *Click on the Domains Properties*** *under Management. For Training Purposes, we will not enter any information in this section.*



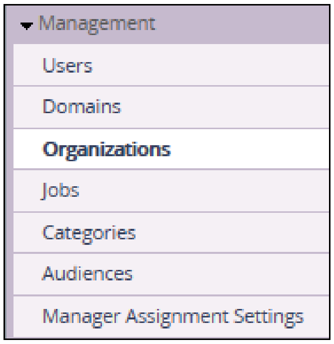

This will provide a list of domains to which this item is assigned.



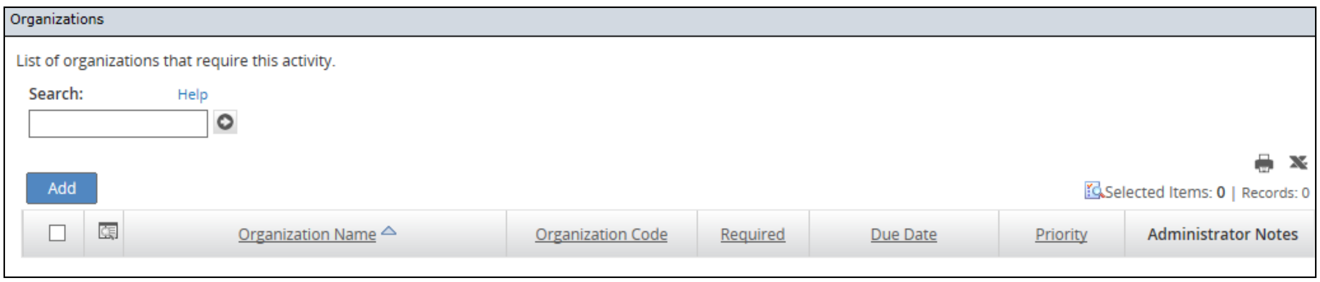
| Properties | Description | Impacts and Considerations |
|---|---|---|
| **Add** | Shares the learning activity across domains This opens the Add Domains page | Training Coordinators: When you create a learning activity it is only visible in the domain that owns the learning activity. If you share it, the learning activity will be visible in the domains you select. Others may want to copy it if you share the activity or use it as part of a subscription link or fulfillment link. |
| | On the Add Domains page, select a domain and click Next to add sharing permissions. This opens the Add Domain Permissions page | -- |
| **Remove** | Removes the sharing relationship of the domain to a learning activity | Training Coordinator: Cannot remove the share permission if the activity is in use in another domain. You can only choose to hide the learning activity from being used in new situations. |

This is where you could specify the domains where this object will be available. An object can be a Learning Activity, Job, Skill and so on.

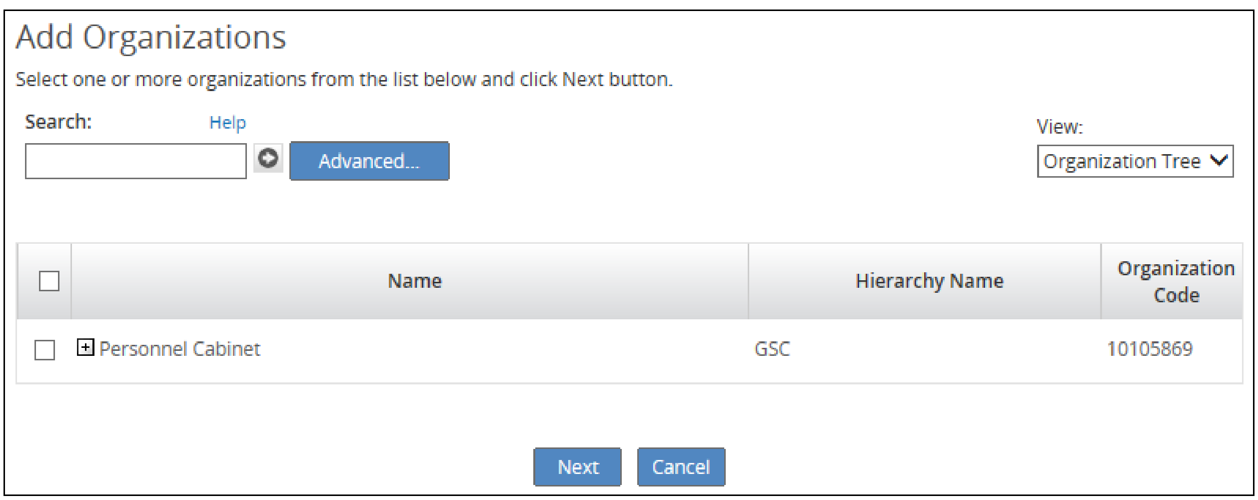
49. ***Click on the Organizations Properties*** *under Management.* *For training purposes, we will not enter any information in this area.*



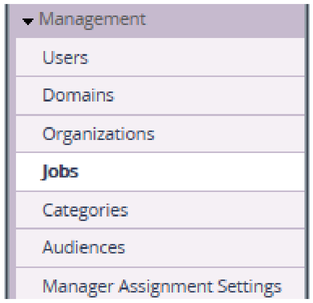

This is where you can find a list of Organizations to select that require this Activity.




Clicking the Add button assigns the selected learning activity to one or more organizations. This opens the Add Organization page so that you can select the organization you need



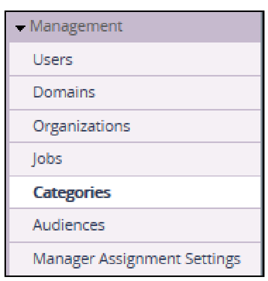
***46. Click on the Jobs Properties** under Management. For training purposes, we will not enter any information in this area.*



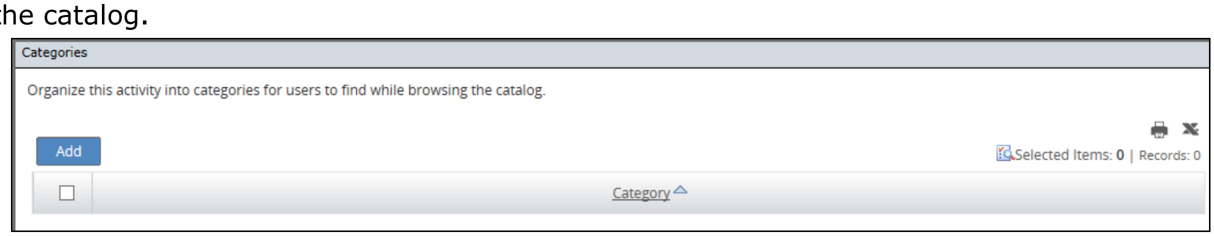

Here you will select a list of jobs that require this Activity.


Clicking the ADD button assigns the learning activity requirements to jobs. This opens another job page, which allows you to pick the job you wish to use.

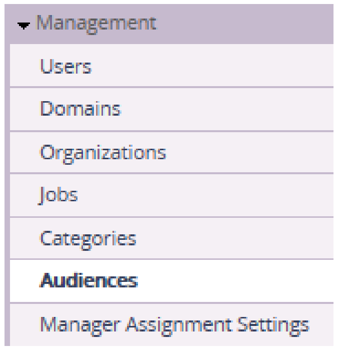
47. ***Click on the Categories Properties** under Management. For training purposes, we will not enter any information in this area.*




Here you can organize this activity into categories for Learners to find while browsing the catalog. Clicking on the Add button allows you to assign the learning activity to a category in the catalog.

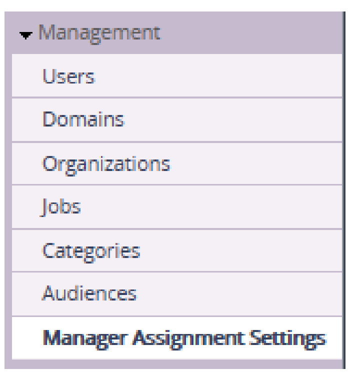


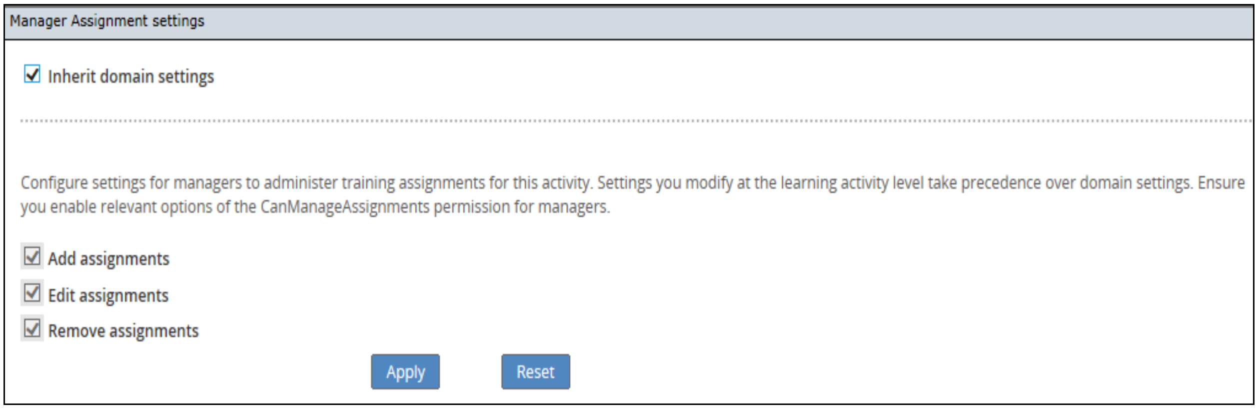
48. ***Click on the Audiences Properties*** *under Management.* *For training purposes, we will not enter any information in this area.*




Here you can select a list of audiences that require this activity. The Add button assigns the learning activity to an audience. This allows Learners to view activities to whch they are assigned.


***49. Click on the Manager Assignment Settings Properties*** *under Management.* *For training purposes, we will not enter any information in this area.*






## Versioning Category

Using versioning you can create versions of a learning activity, and enroll users trained in the previous version automatically for the new version. This helps Managers and Training Coordinators to track the compliance status on the latest version of training that users need to complete within a specific time period.

50. From the Staging box, **Click the Ready for Production** link to make it available and add it to your user's to do list.

51. **Click Move to Production**

(If you receive errors, they must be corrected before you can move to production.)

You can make changes to any properties while in Staging and then move the course from Staging to Production. **Once you move the course to Production, you cannot make changes unless you bring it back to Staging again**.

# Registering Participants for a Learning Activity

Learning Activities are any training opportunity available to you in KELMS. These can be any of the following:

- Digital document
- Computer based training
- Webinar
- Instructor-led course
- On-The-Job Training of any type
- Training offered by an outside vendor

After you locate a learning activity that interests you, click the Register button to sign up for the activity. Your Manager or proxy will be notified of your registration request. Once the Manager approves the training you will be placed in the class or activity. If it is already full you will be placed on a waiting list.

Some online activities do not require registration. The Register button will not appear for these types of activities.

KELMS includes a batch registration functionality that significantly reduces the time taken to register multiple users for activity structures. This functionality, combined with the ability to designate users as training enrollers, ensures that batch registrations are easily completed.

## *Understanding Batch Registration*

The batch registration feature allows you to concurrently add multiple users to a training roster. There are two types of batch registration options available:

- **Register others** - This option **registers a batch of users** similar to when registering yourself for training. All registration restrictions, such as prerequisite requirements, capacity limitations, registration approval requirements, and other requirements, can be checked during this process.

  - **Add users directly to roster** - With the appropriate permissions, this option **allows you to add users directly to an activity roster**. You may also have the options of bypassing all registration restrictions, such as capacity limitations, registration approval requirements, and other requirements. This type of registration is commonly used in situations where a user needs to be added to an activity roster and the formal registration process blocks this registration (registration restrictions). It can also be used to record training that has already occurred.

*Note: If you choose a registration option that bypasses validation, you are placing the selected users directly on the activity roster without checking for activity capacity and required prerequisites.*

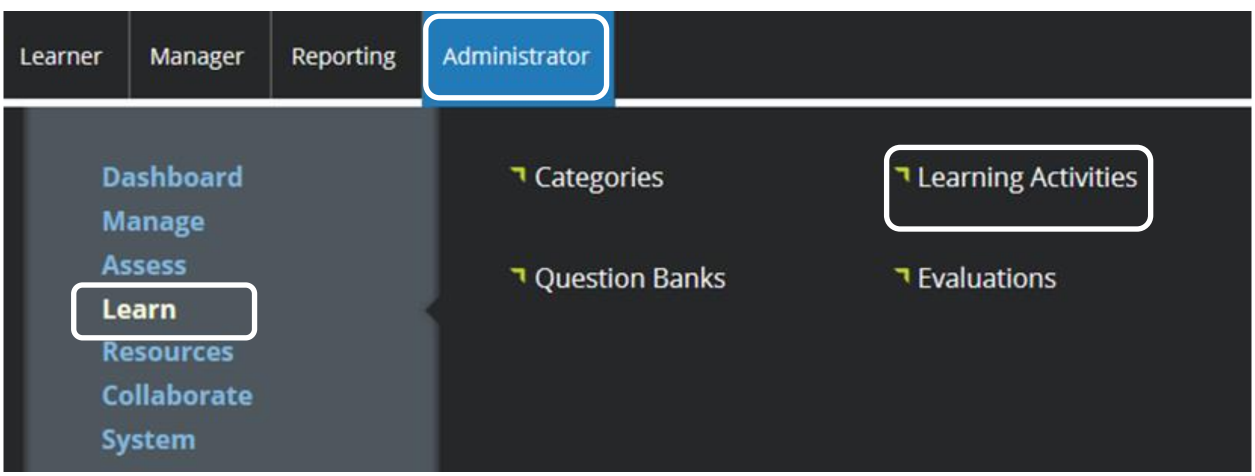
**Both registration options enable you to select and simultaneously register a batch of users for an activity structure by choosing or specifying**:

- A **domain** or an organization (or related descendant organization) of which the users are members
- A **job** that the users hold
- A **common Manager**
- An **audience** to which the users belong
- **Users who are assigned the activity** as a requirement
- **E-mail, user number, or username**

## Exercise 8 – Batch Registration For Your Domain

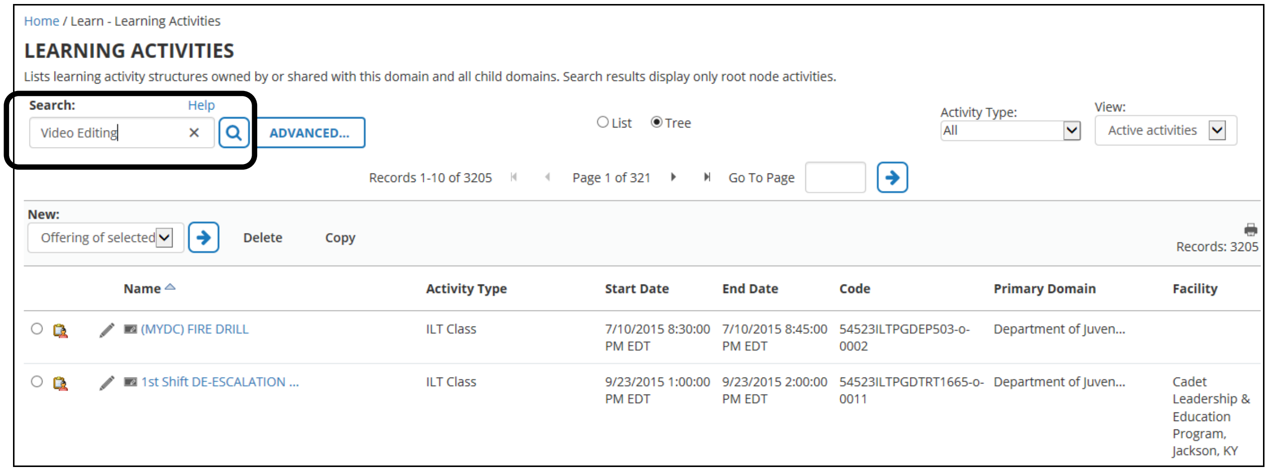
► **To Batch Register participants for a Learning Activity:**

1. Hover the mouse over the **Administrator** tab.
2. Hover the mouse over **Learn**
3. Click on **Learning Activity**



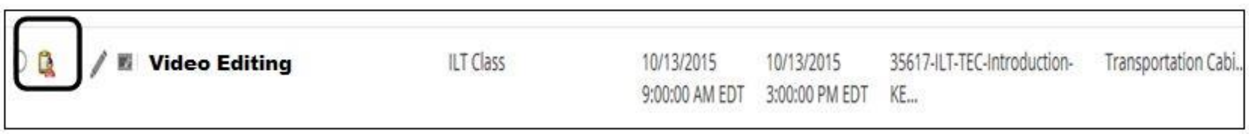
The Learning Activities page will appear.

4. **Enter the class** in the Search box and **Hit Enter.** ***(Refer to your Student Card)***

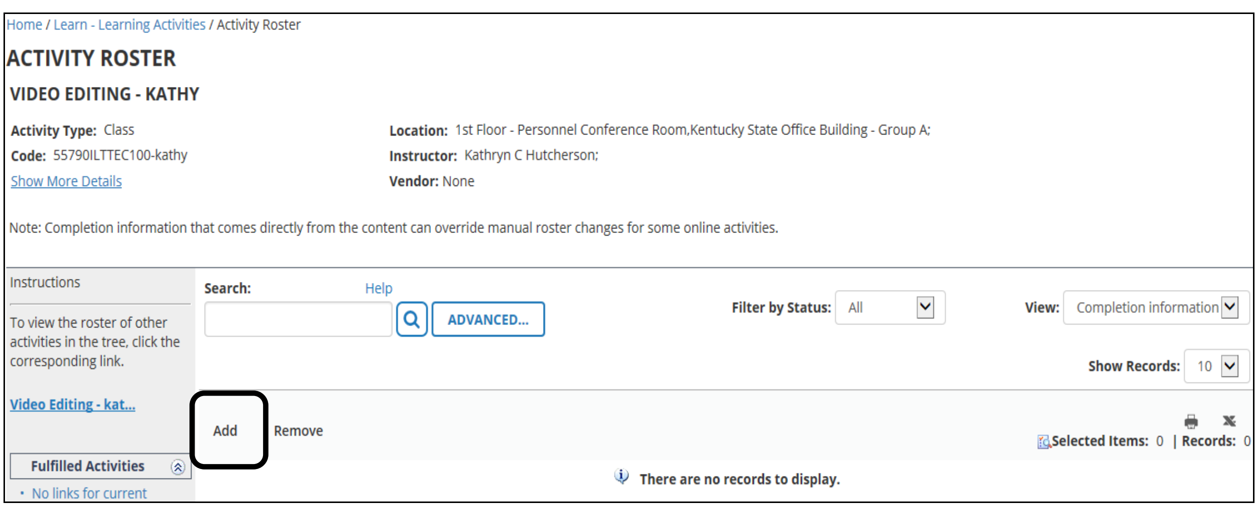



The Learning Activities page opens.

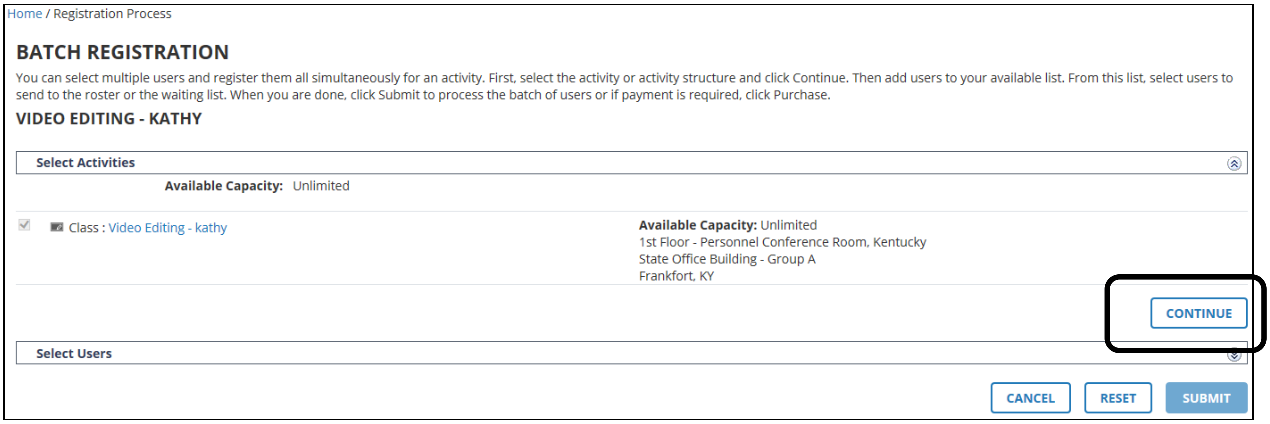
5. **Click the Manage Roster** Icon (Clip board with person) for the **ILT Class** you need



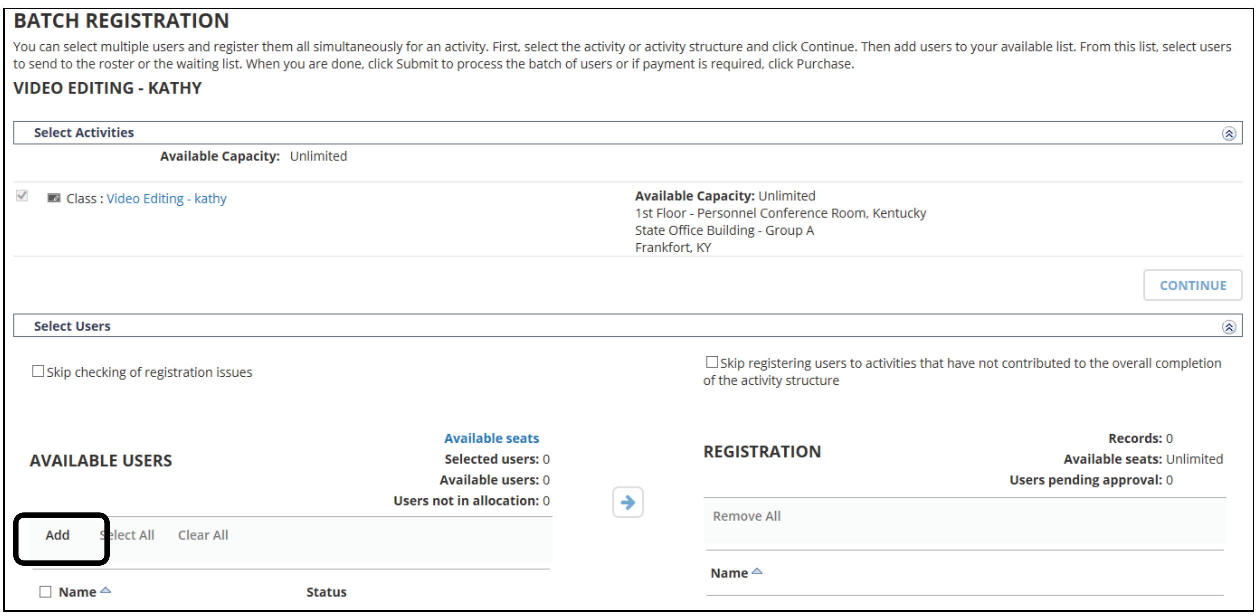

6. The Activity Roster page opens for the class. Scroll down a little and **Click the Add** button.



7. The Batch Registration page opens for the class. Click **Continue** and scroll down.

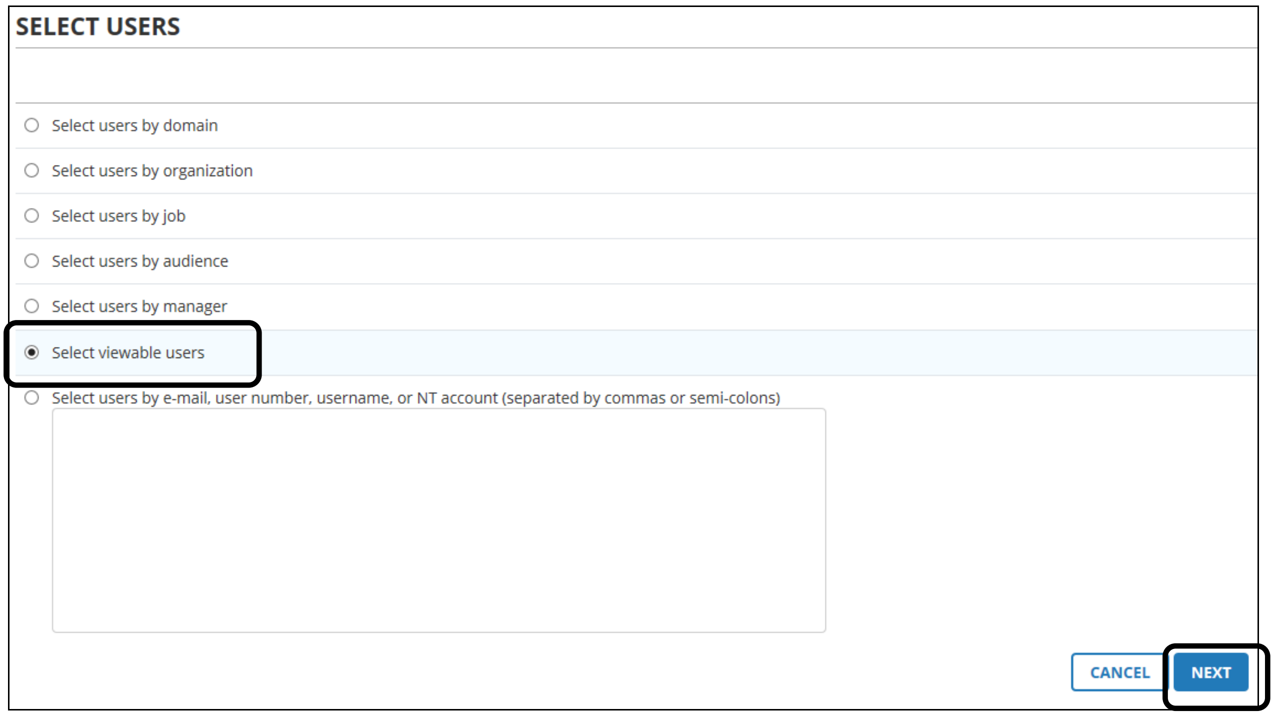



8. **Click the ADD button** under Available Users to add learners to the class.



The Select Users page opens.

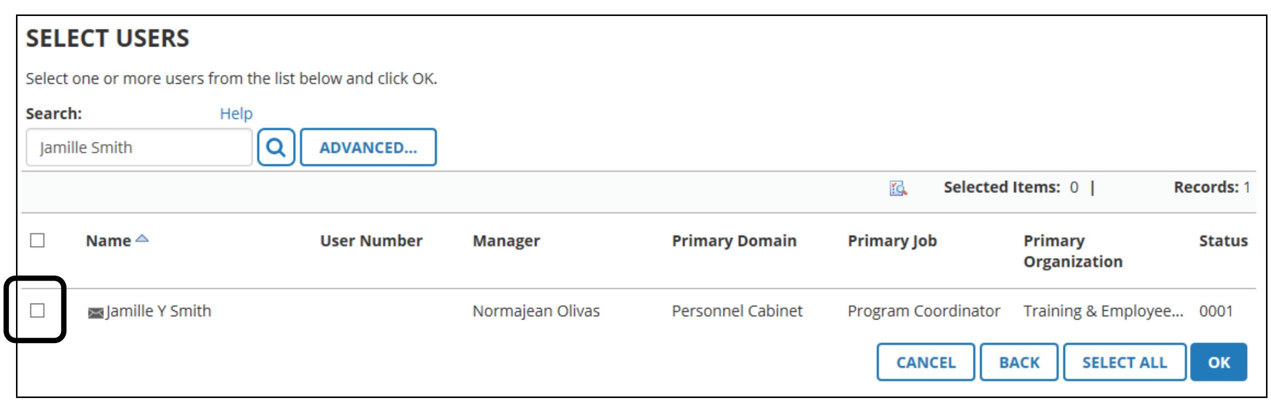
9. Click the radio button for **Select Viewable Users**
10. Click **Next**




11. Enter your **learners name** in the Search box.

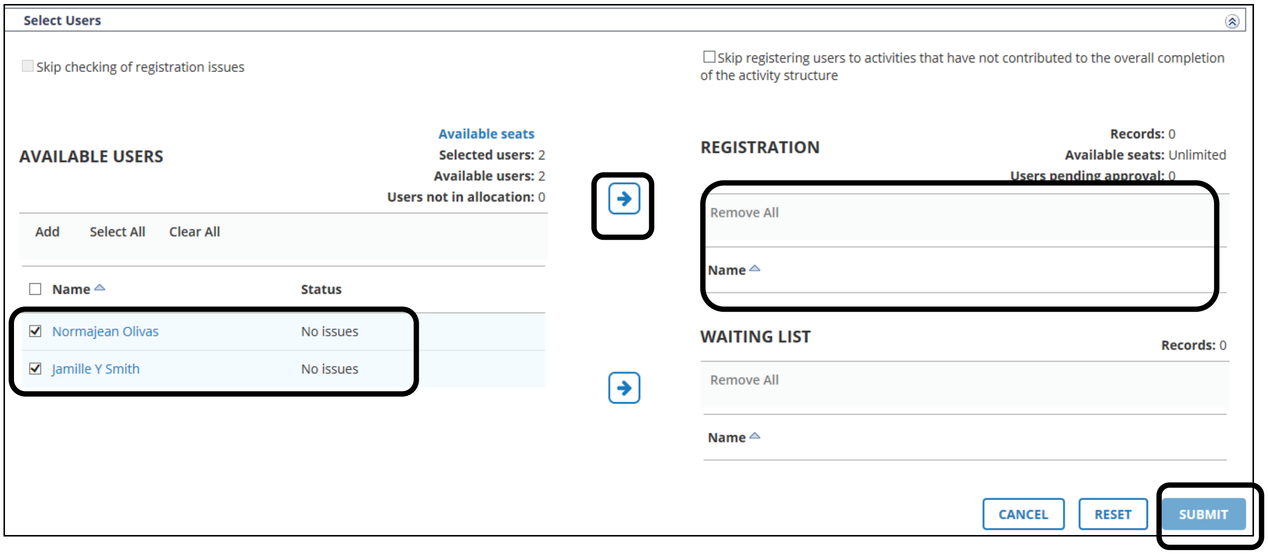
12. Click **Go**

13. **Click the box** beside the name to select the learner.




14. **Search and Select another learner** name and **Click the box by the name.**

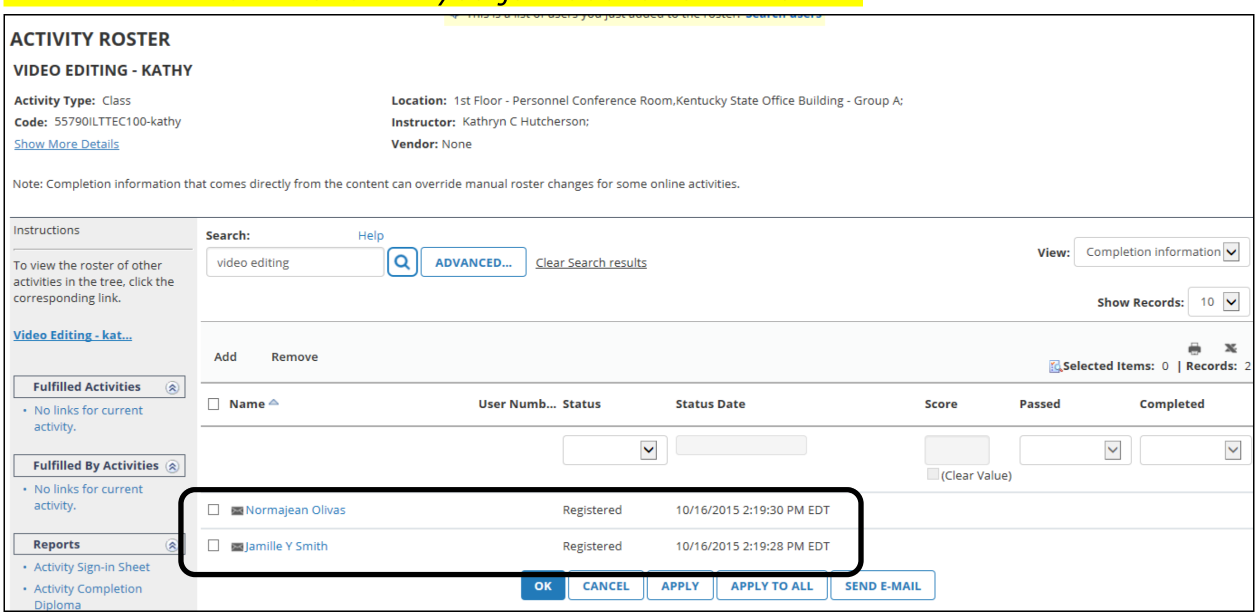
15. **Hit the OK button in the bottom right hand corner.** Both Learners should now appear in the Available Users box on the left.




16. From the middle of the screen, **Click the top arrow** to place the users in the Registration box.
    a. Participants will be directly enrolled in the class unless the class is already full. In that case, the Learner will appear on the Wait List.

17. **Click Submit**

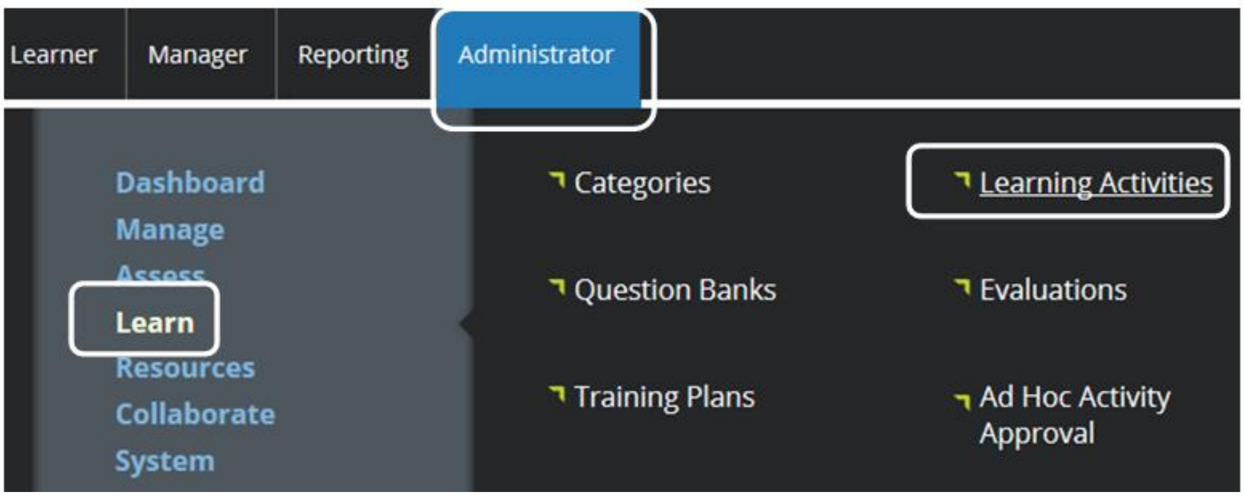
The Activity Roster will reappear, allowing you to see the participants that have been registered for the learning activity. *Note the yellow message at the top of the screen…This is a list of users you just added to the roster*.



# Exercise 9 – Modifying a Registration

► **To modify a registration:**

1. Hover the mouse over the **Administrator** tab
2. Hover the mouse over the **Learn** menu
3. Click **Learning Activity**




4. The Learning Activities page opens so you can search for the learning activity

5. **Enter <u>Video Editing</u>** in the Search box and **Click Go.**

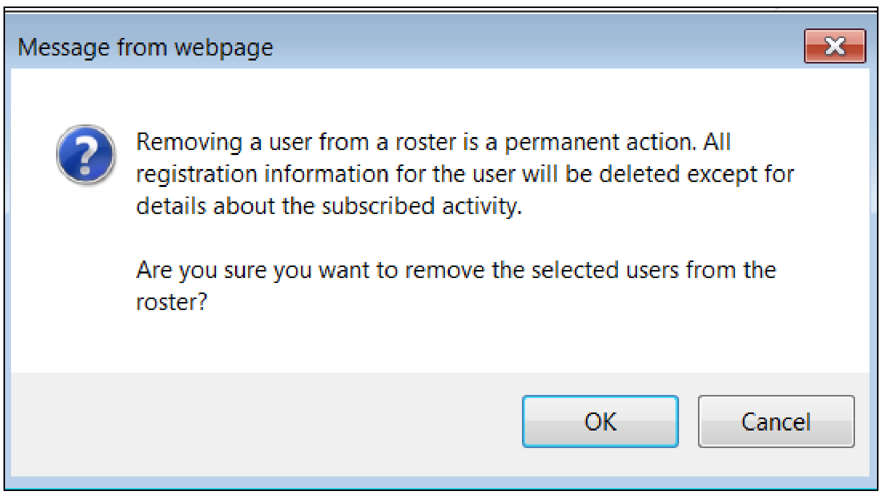
6. **Click the Manage Roster Icon**  for the ILT Class you need

7. The Activity Roster page opens for the class

8. **Click the box beside the Learner name** in which you wish to REMOVE

9. **Click the REMOVE button** in the upper left hand corner

10. A message will appear asking you if you are sure you want to remove the Learner from the class.




11. **Click OK** and the system will ask you to "Please Wait"

12. The update is made and the roster reflects that the Learner you removed is no longer registered for the learning activity.

13. An email will be sent from KELMS to the learner to inform them of their removal from the class.

## Identifying Registration Checks

KELMS is designed to automatically verify that users registering for training are both permitted and available to take the training before any registration requests are finalized. This functionality automates the validation process required to ensure that training is offered to the correct individuals. You can bypass the registration checks.

Assuming that registration issues are being checked, registration requests are verified to ensure that:

- Learners meet the required prerequisites for the activities to which they are registering.
- Learners are approved for the activities and tracks for which they are registering (if approvals are required).
- Learners are not registering for an activity that they have already completed or fulfilled with the completion of another activity.
- Learners are not registering for an activity that conflicts with another scheduled activity for which they are already registered.
- Learners are registering for the activities within the allowable registration period.
- Seating in the requested activities is available.
- Learners did not exceed the maximum allowable registrations for the activity (computer-based training activities only).
- An organization is chosen for billing the cost of the activities.

During registration, any identified registration issues are noted with one of three icons.

| Icon | Name | Description |
|---|---|---|
|  | Registration Warning | Indicates that there is an identified issue with the registration request; however, the issue can be overridden or resolved. |
|  | Registration Blocker | Indicates that there is an identified issue that restricts registration completion.<br>Users require help from an Administrator to correct these issues. |
|  | Registration Information | Indicates that there is registration information that the user needs to know. |

## Exercise 10 – Registering for State-Wide Training

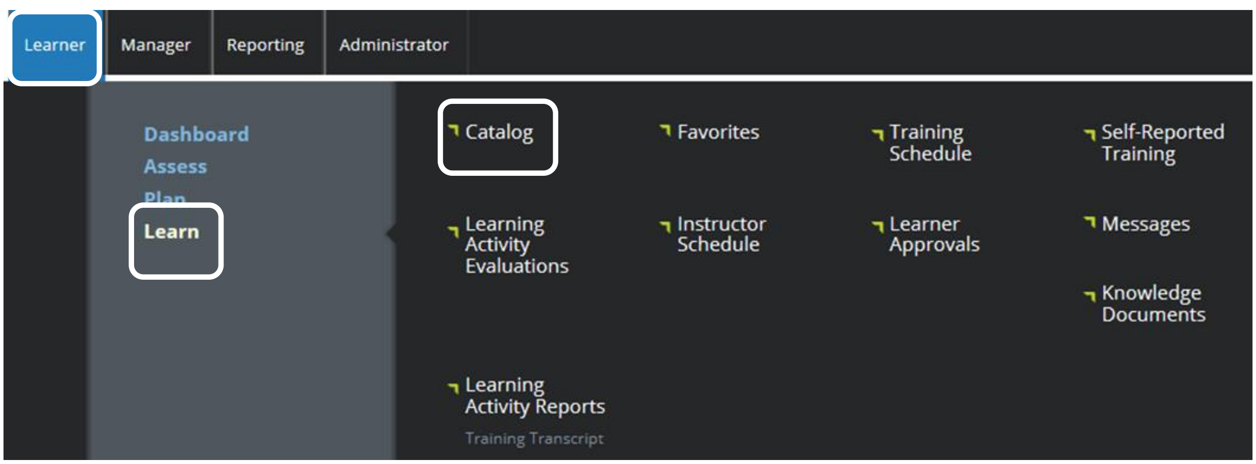
(GSC, KHRIS, eMARS, KBUD, KEAP & other Personnel Cabinet Training)

► **To Register Employees for State-wide Training:**

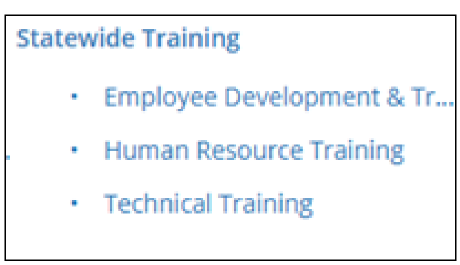
By default your catalog on your Learner Dashboard is your Domain's catalog. You can see the categories created by your domain.

You can search for an Activity using the search field or the catalog. You can search for ALL activities in the search. The basic Activity Search is the recommended way to locate a training class, however it's important that you know how to use the catalog.

1. Hover the mouse over the **Learner tab**
2. Hover the mouse over the **Learn menu**
3. Click on **Catalog**

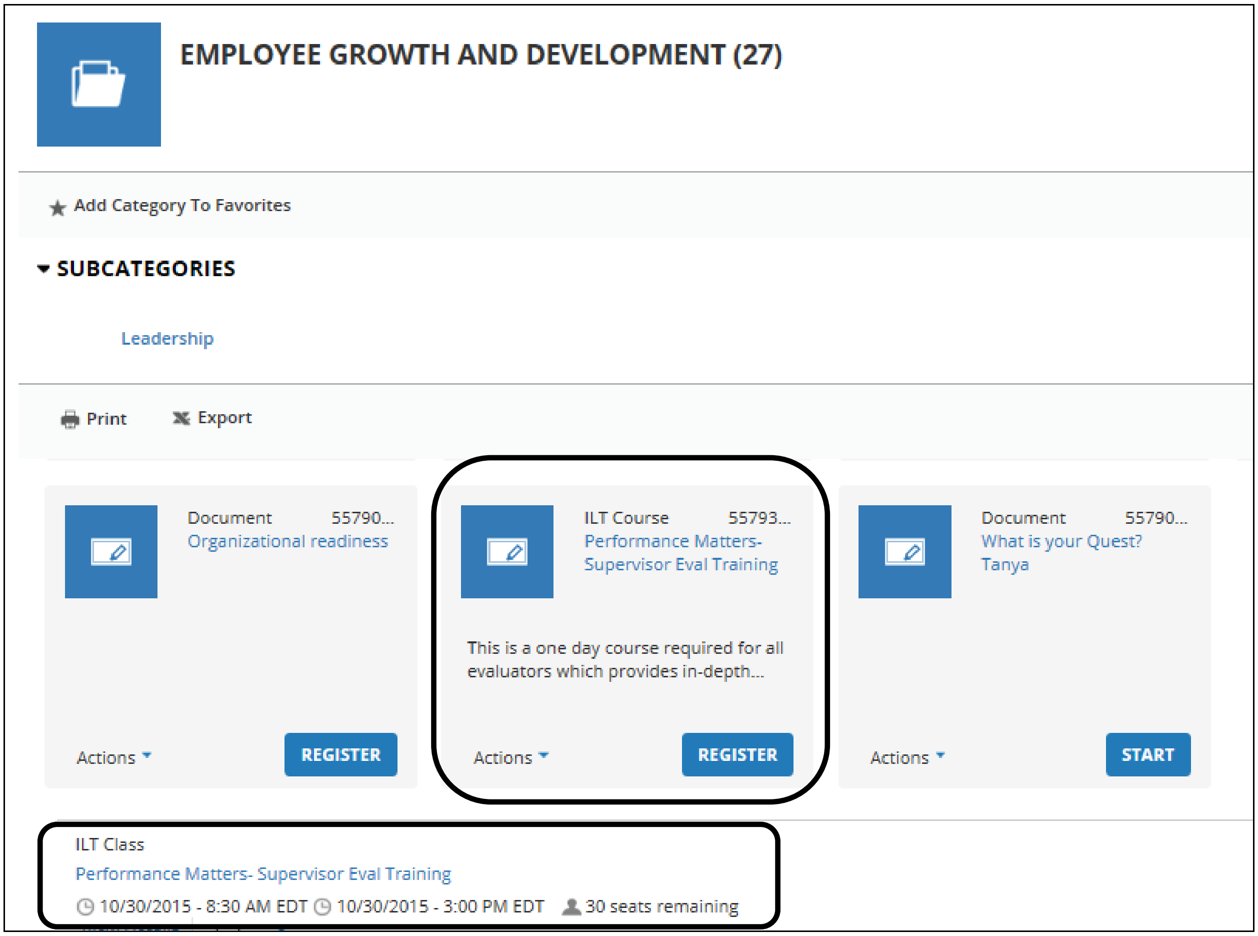



4. The catalog page will appear reflecting a list of state-wide training categories

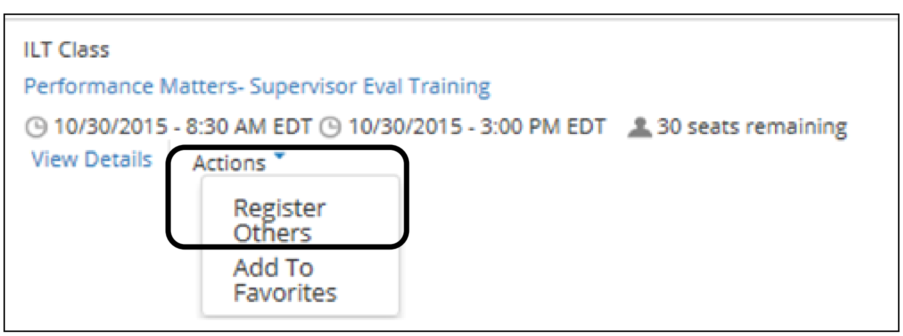



The Majority of training will be found under Employee Development & Training category.

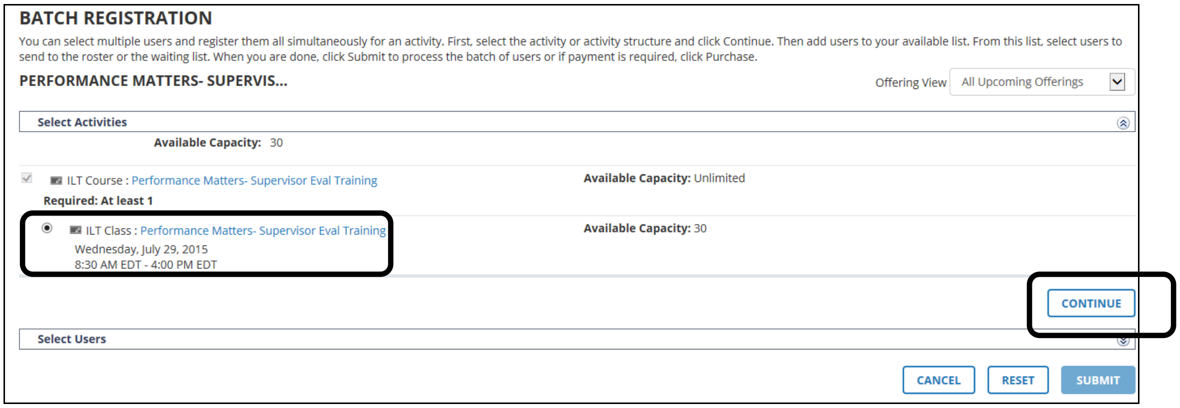
5. Click Employee Development & Training Category
6. When you find the course, **hover over actions**.
7. Click **View Subactivities**




8. When you find the class date you are interested in, **hover over actions**.
9. Click **Register Others**

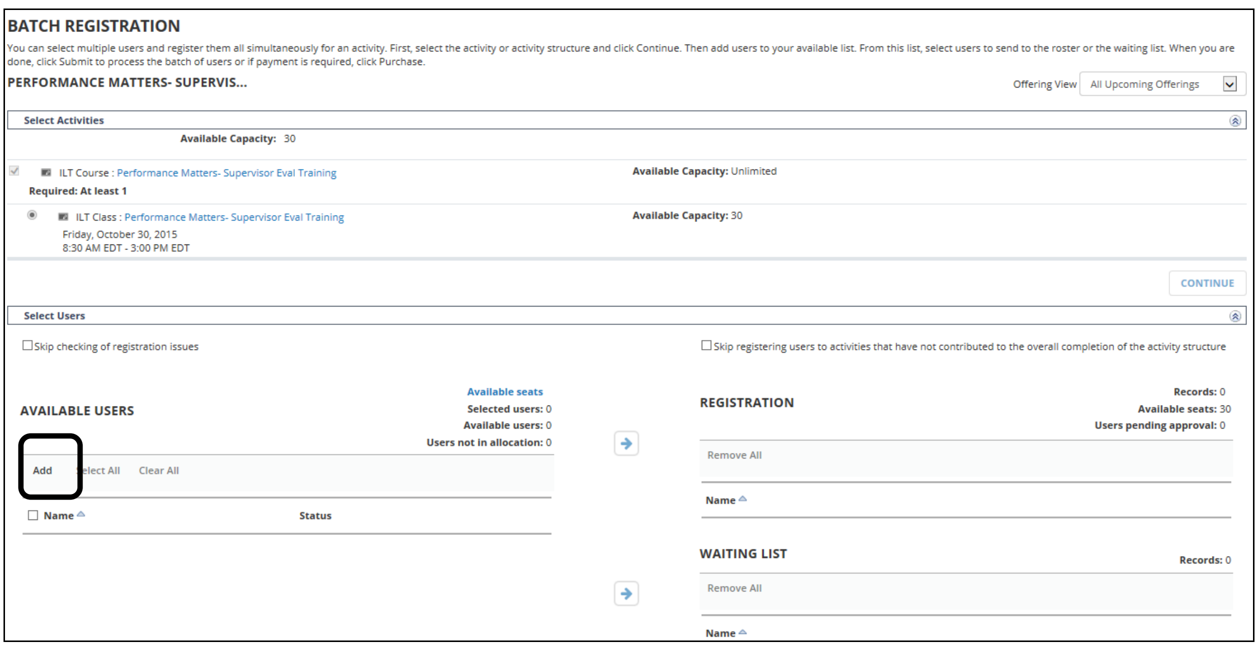


10. Use the radio button to select the class that you would like them to attend.
11. Select the blue **continue** button and scroll down.

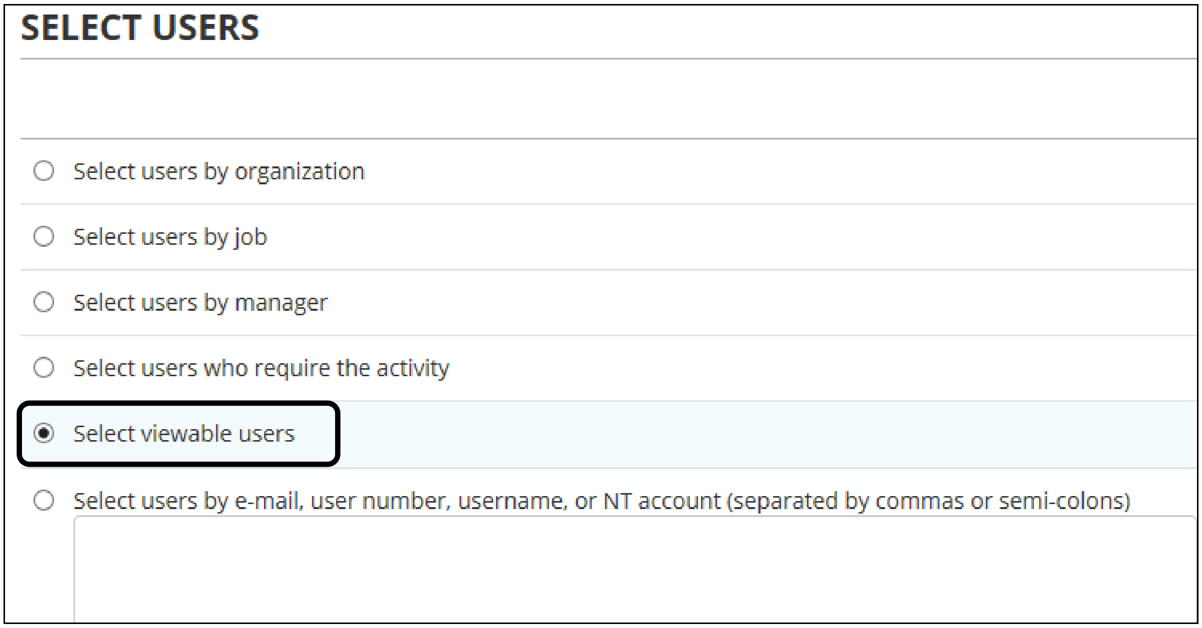



The Batch Registration Screen will appear.

12. In the "Available Users" box, click the **Add** button.



13. Select how you want to search for the learners. Click on **viewable users**.
14. Click **Next**.




15. In the Search box at the top enter the name of a co-worker and click **Enter.**

16. **Check the box** beside the learner name to select it.

17. **Find another co-worker**. In the Search box at the top enter the name of another co-worker and Click **Enter**.

18. **Check the box** beside the learner name of the second person.

19. **Click OK**. This will add to the Available Users Screen, all the names you chose.

20. **Click on the top arrow** in the middle to move your selected available users to registration; Click on the bottom arrow to move them to the wait list if the class is full. **(Pay attention to the selected users in the Available Users box. Make sure you don't have too many people selected.)**

21. **Click on the Submit button**. **DONE!** (You should be cc:ed on the registration confirmation for everyone you enroll.)

**TO CANCEL A PARTICIPANT FROM CLASS**
**REFER TO PAGE 5 OF QUICK REFERENCE SHEET**

# Learning Activities

Learning activities are different forms of training in KELMS such as documents, online courses, Instructor-led classes. All learning activities have general properties and attributes that determine their behavior. You can use them as is, you can use them to build more complex blended training and you can reuse them in different training structures. If you use them correctly, they can:

- Reduce your workload
- Make it possible to create leveled training, such as a basic training and advanced training
- Organize your training
- Create registration options
- Deliver assessments
- Create versions for training that must be updated frequently
- Allow end-users to track external training
- Create continuing education activities associated with your specific requirements
- Offer the flexibility to track On the Job training events
- Upload content

There are many Activity Types in KELMS so it's important to choose the type that best suits your needs.

| Activity | Description |
|---|---|
| **Class** | This activity may be self-directed or facilitated. You can create a single class and schedule a date and time. It is one of the simplest stand-alone learning activities in the system. |
| **Course** | This activity can be used for on-line content. Most content that you upload becomes a course by default. The exception is knowledge and general documents, which become documents by default. |
| **ILT Course** | This activity is a template for instructor-led training. Create it as a stand-alone activity and reschedule it as necessary by creating new ILT classes. You can also use ILT Courses in curricula for blended learning. As such, it is a good place to start. |
| **ILT Class** | Create this activity based on an ILT course activity. Each time an ILT course is offered, you will want to create a separate ILT classes within it. These ILT classes offer distinct training to Learners, including specific dates and times for each ILT class. Each ILT class also includes its own roster of registered Learners. |

| Activity | Description |
|---|---|
| **Session** | This activity is not stand-alone but is offered as part of a class, especially if there are multiple days, locations or instructors. |
| **Quick Assessments** | Use this simple activity to **create assessments to track student knowledge.** These are flexible activities that you can use for pre- or post-assessment. You can connect them to other activities or offer them as stand-alone knowledge checks. |
| **Curriculum** | Use a curriculum to **define a learning path** that identifies the required objectives and the order in which these objectives should be completed. It is best used after you create the learning activity courses contained in the curriculum and also ensure they can be subscribed to. |
| **Objective** | Use this activity type to organize learning activities within a curriculum and support blended learning. |
| **Topic** | This is another way to group learning activities. Use topics within a curriculum or outside a curriculum. You also use them to modify options that make it easier for a Learner to register. |
| **Versional** | If you need to update training frequently, consider setting up a versional activity. This activity **holds records for all versions of an activity.** |
| **Self-Reported Training** | Use this activity type if you want Learners to track training taken outside the LMS. |
| **CE Requirement Group** | This activity allows you to organize the course-level activities into groups of continuing education requirements. |
| **CE Credit Category** | This activity allows you to organize class-level learning activities into categories that count toward continuing education credits. |
| **On-the-job training (OJT) course** | Create an OJT course activity to allow Managers to report training they have provided to their employees. Once an Administrator establishes the OJT course, Managers can create an OJT class each time the training is offered to an employee. |
| **On-the-job training (OJT) class** | Administrators or Managers with permissions can create an OJT class each time an OJT is offered. It can be created before or after the occurrence of the actual activity. |
| **Create your own learning activity:** | If none of the above learning activities fit your needs, you can create your own. However be careful…<br>If you build a new activity type, make sure you plan well. Other training Administrators and system Administrators need to test, scrutinize and buy into the new addition. Otherwise, there could be confusion over the use of the activity. |

# How Do I Choose an Activity Type for my Training?

Use the decision tree in this section to decide which of the activity types is best for your training.

- Step 1.
  Do you need more than one activity?
  - If yes, go to 3
  - If no, go to 2 *note that if you decide you want to use this 1 activity in a bigger structure, you can!
- Step 2.
  Do you have content?
  - If yes, upload content it will automatically be created as a **course** or a **document**
  - If no, go to 4
- Step 3.
  Do you need to offer the activity multiple times with an instructor?
  - If yes, create an **ILT course**; add an **ILT class** each time you offer the activity
  - If no, go to 5
- Step 4.
  Do you need a simple self-directed or delivered activity?
  - If yes, create a **class**
  - If no, go to 6
- Step 5.
  Do you need to create a blended learning experience with multiple activity types without any specific order?
  - If yes, create a **curriculum**
  - If no, go to 7
- Step 6.
  Do you need to determine what an employee knows or has learned?
  - If yes, create a **quick assessment**
  - If no, go to 8
- Step 7.
  Do you need to create a blended learning experience with multiple activities that are offered in a certain order?
  - If yes, add an **Objective**
  - If yes and you also want to offer different registration options, add a **Topic**
  - If no, go to 9

- Step 8.
  Do you need to update content frequently?
  - If yes, create a **versional** activity
  - If no, go to 10

- Step 9.
  Do you have multiple days in a class that are led by different instructors or in different locations?
  - If yes, add a **session**
  - If no, go to 11

- Step 10.
  Do you want employees to be able to add outside coursework into the LMS?
  - If yes, add **self-reported training**

- Step 11.
  Do you want instructors to be able to track their Outlook meetings as training activities
  - If yes, add an **Ad Hoc Course** and your instructors can add an **Ad Hoc Class** through the Outlook Plug-in
  - If no, go to 12

- Step 12.
  Do you want Managers to be able to offer training to employees in a flexible way?
  - If yes, add an **On the Job Training Course** and your Managers can add an **On the Job Training Class** when they need it
  - If no, go to 13

- Step 13.
  Do you need to work with Continuing Education?
  - If yes, add **CE Credit Category** and then add a **CE Requirement Group**
  - If no, proceed with caution and consider creating your own Activity Type

# Resources and Assignments

## Assigning Resources

Training resources, such as vendors, facilities, locations, and equipment, refer to items that are required to deliver training. Some specific examples of resources include training rooms, instructors, computers, and overhead projectors. In addition to training delivery resources, you can set up other resources such as purchase orders and notification templates.

By managing training resources, you can ensure that your enterprise's training delivery logistics are well coordinated.

Before you begin to schedule training, you must enter all resources and select them when you schedule learning activities. Automatic conflict checking ensures that resources are not overbooked.

### *Viewing Resources*

You can view all the resources that belong to your domain or to any of its child domains.

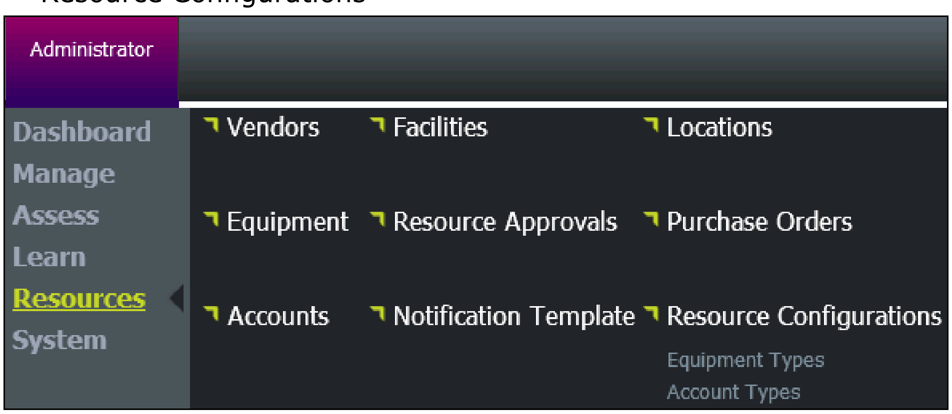
---

*Note: Viewing or updating resource details can be completed only in Administrator mode.*

---

The **Resources** menu includes the following options:

- Vendors
- Facilities (*identifies the building)*
- Locations (*identifies the specific location*)
- Equipment
- Resource Approvals
- Purchase Orders
- Accounts
- Notification Templates
- Resource Configurations




To view resources, click an option and browse through the available resources from the **Resources** menu.

**TO CREATE RESOURCES, REFER TO PAGE 10 OF THE QUICK REFERENCE SHEET.**

# ILT Courses with ILT Class Offerings

As a Training Coordinator, you will create all your ILT Courses for your Instructors. The ILT Courses are the templates in which you will build your learning activities from.

In **Part 1** of this section, you will learn how to create an ILT Course in KELMS. An ILT Course is a **template for instructor-led scheduled events**.

You can use an ILT Course:

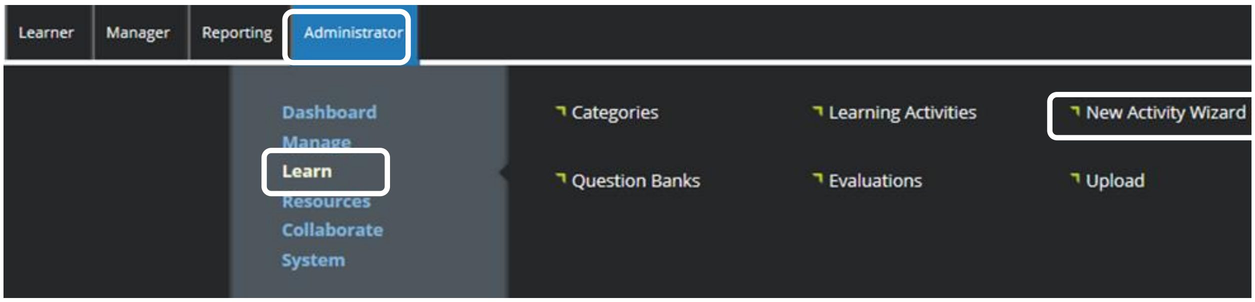
- As a component of a curriculum or can be a stand-alone activity & reschedule it as necessary by creating new ILT classes.
- To teach skills, teach new behaviors, or transfer knowledge.

In **Part 2** you will learn how to **create an ILT Class from an ILT Course**. ILT Classes are scheduled instances of an ILT course.

## Exercise 11: Part 1: Create an ILT Course Using the Wizard - Part 2: Create an ILT Class From the ILT Course

**► Part 1 - To Create an ILT Course that can be offered multiple times using the New Activity Wizard**

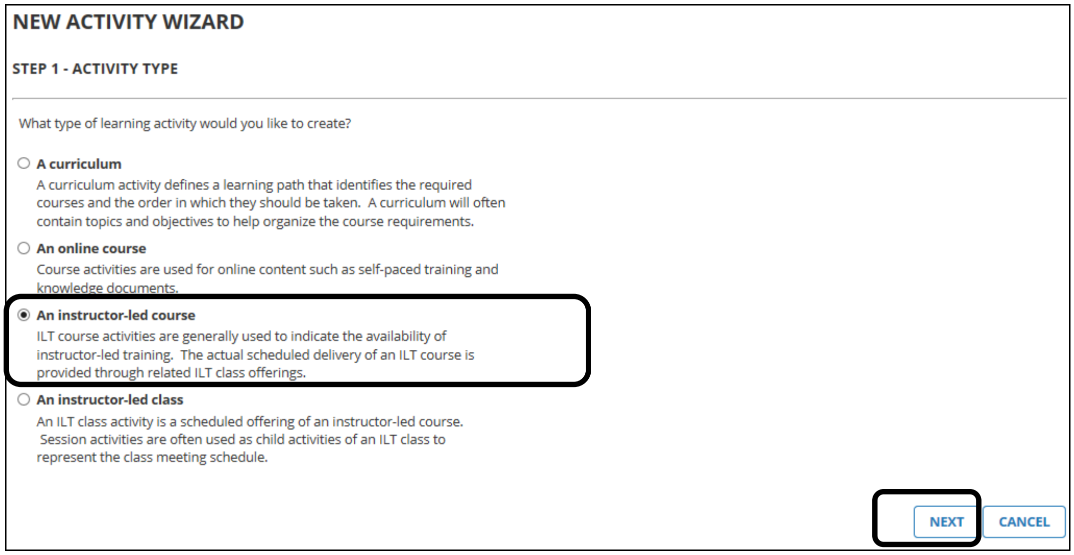
1. Hover over the **Administrator tab**
2. Hover over the **Learn menu**
3. Click New **Activity Wizard**.




The New Activity Wizard page will appear (Step 1 – Select an Activity Type)

**Choose Instructor-Led Course**. (option #3)

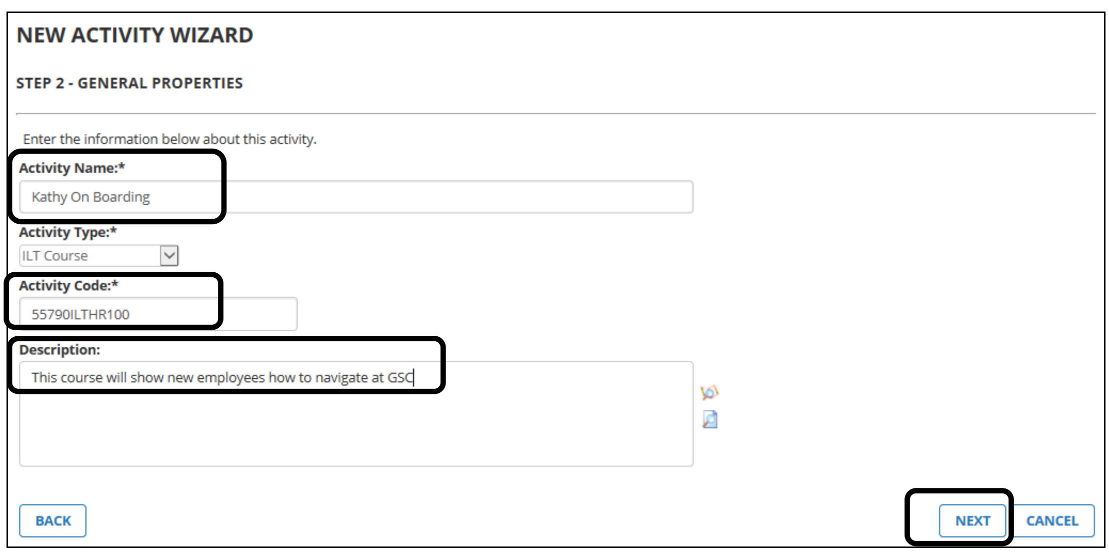
4. **Click next**.




5. **Step #2 – General Properties**
6. **Name your activity.** ***Refer to your Student Card.***

Your activity code prefix may be automatically added or you can add an appropriate code. The Activity code helps users to search for an activity using the advanced search feature.

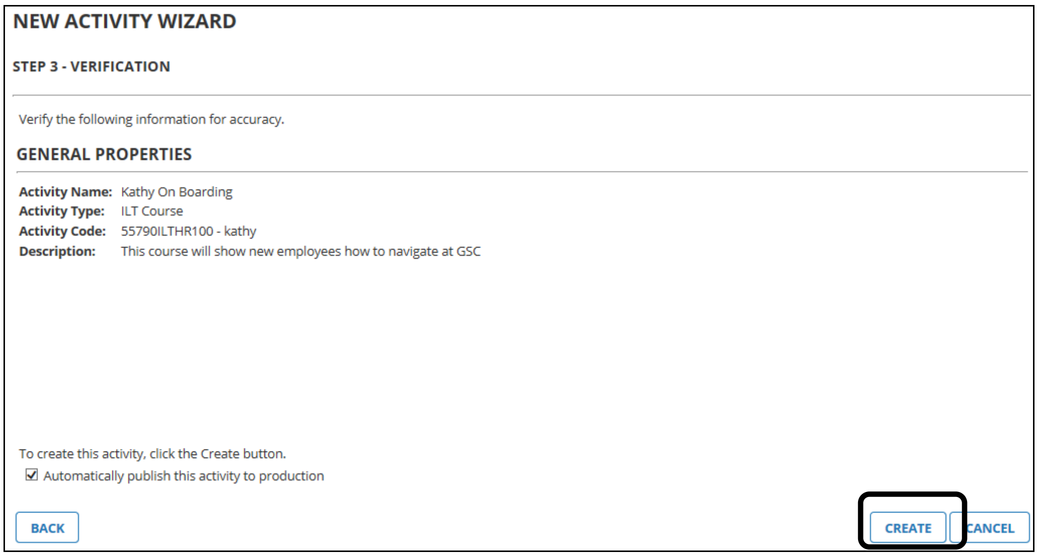
7. Enter your **activity code (unique id).** ***Refer to your Student Card.***
8. Add a **description**
9. Click **Next**



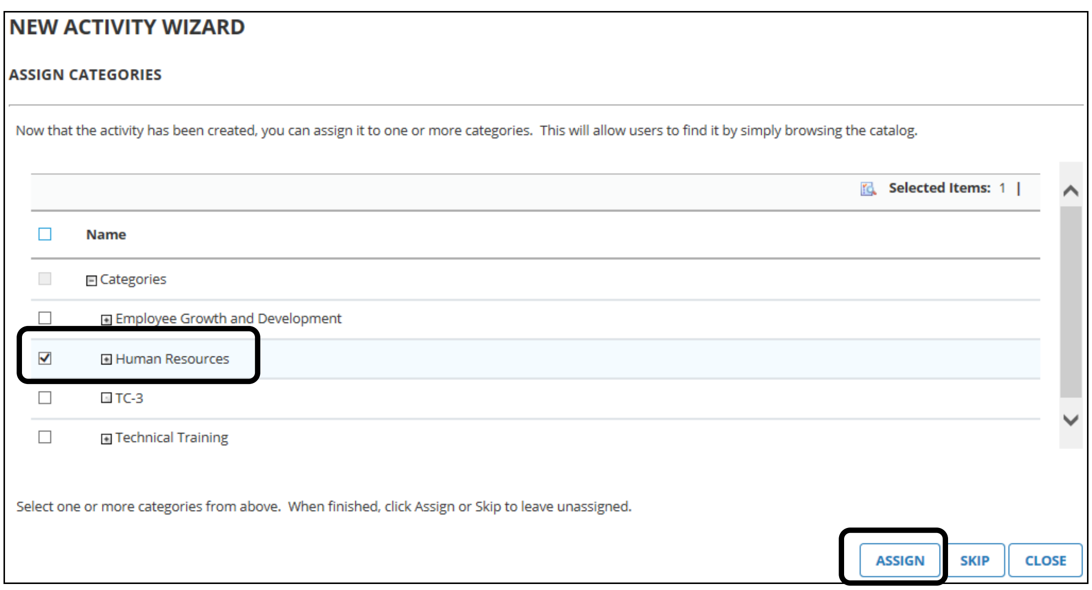
10. **Step #3 – Verification**

11. **Verify the information** you created in the New Activity Wizard. To make your ILT course immediately available, select automatically publish this activity to production. If you need to add any property options (pictures, audiences, or so on) you will want to uncheck this box and your ILT course will be moved to Staging. **Remove the Check in the Box for Automatically Publish**.

12. **Choose Create** unless you have any changes to make. If so click the Back button.



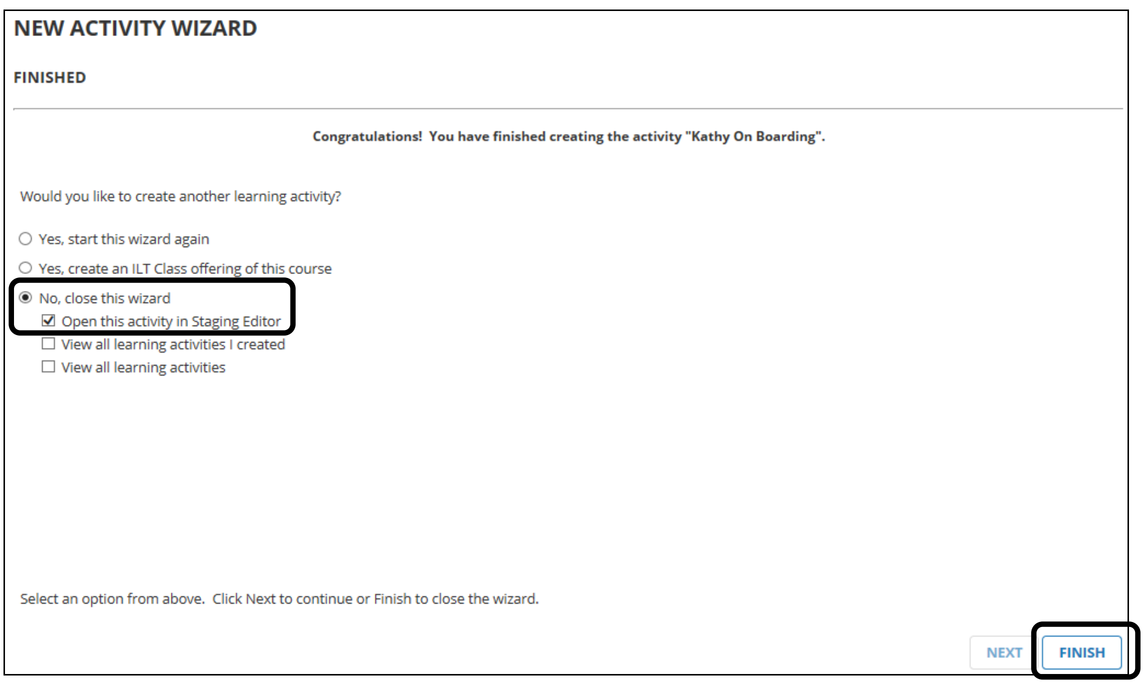

13. **Choose Assign** to assign this class to **Human Resources Category**. Assigning the category will assist Learners in locating your course in the catalog.



The New Activity **Finished Screen** will appear allowing you to choose from three different options.

14. You have completed your activity, now you will need to choose your next step. **Choose the third option**.

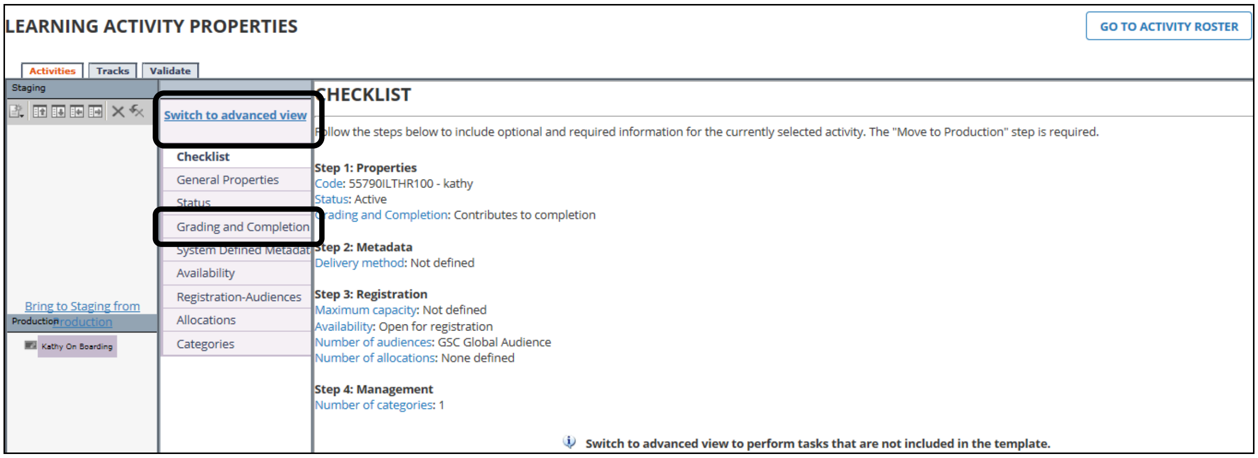
    - Yes, start this wizard again allows you to create completely new activity
    - Yes, create an ILT Class offering of this course creates an offering of your ILT Course that will allow you offer the class at a specific time and location for your Learners. This ILT Class can be tracked at the ILT Course level.
    - **No, close this wizard gives you 3 more options**
        - **Open this activity in Staging Editor allows you to make further changes to your ILT Course**
        - View all learning activities I created will allow you to view activity that you have created
        - View all learning activities will allow you to view all learning activities in your system



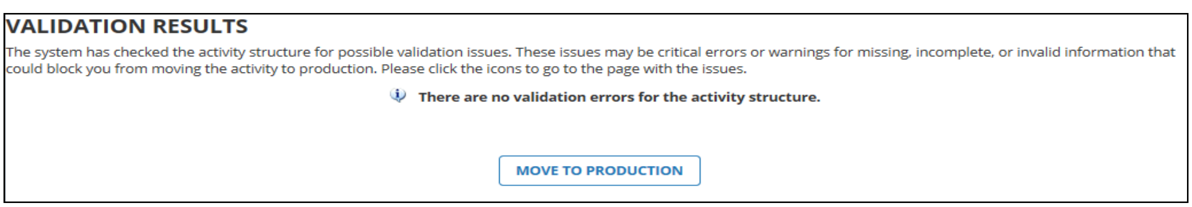

15. **Click Finish.**

The ILT Course opens in Staging.

16. **Click Switch to Advanced View** (now we can finish entering our info)




17. Click the **Properties** Category
18. Click **Status**
19. Select **CAN BE SUBSCRIBED** – Click **APPLY.**
20. Click on **Grading & Completion -** Check **Required to be Completed.**
21. Enter **Estimated Duration Hours**
22. Enter **Credit Hours**
23. Click **Apply**
24. Click on **Notifications>System**
25. Click the **VIEW** drop down box **and select ACTIVE** (to see what's active)
26. Click the box beside **Notification Name** to select all notifications.
27. Click the drop down box under **TASK** and change it to **INACTIVATE** – **Click Go**
28. Click **READY FOR PRODUCTION** in the Staging Window.
29. Click **Move to Production**

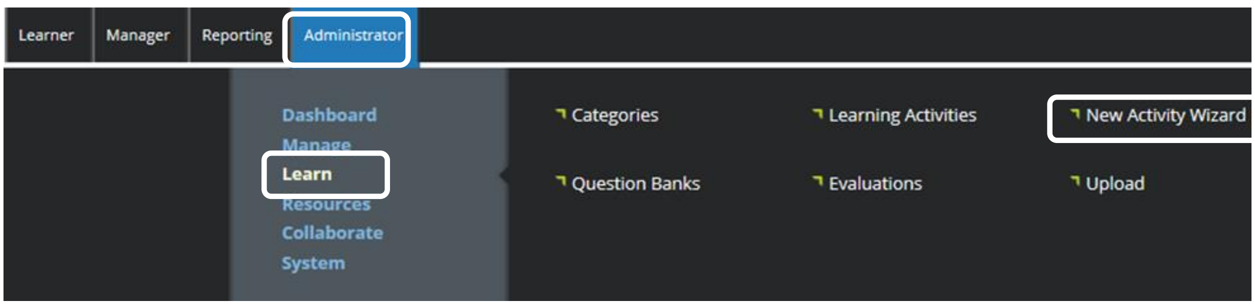



**Congratulations! You have just finished Part 1 by creating the ILT Course!**

## ▶ Part 2 - Create an ILT Class using the New Activity Wizard.

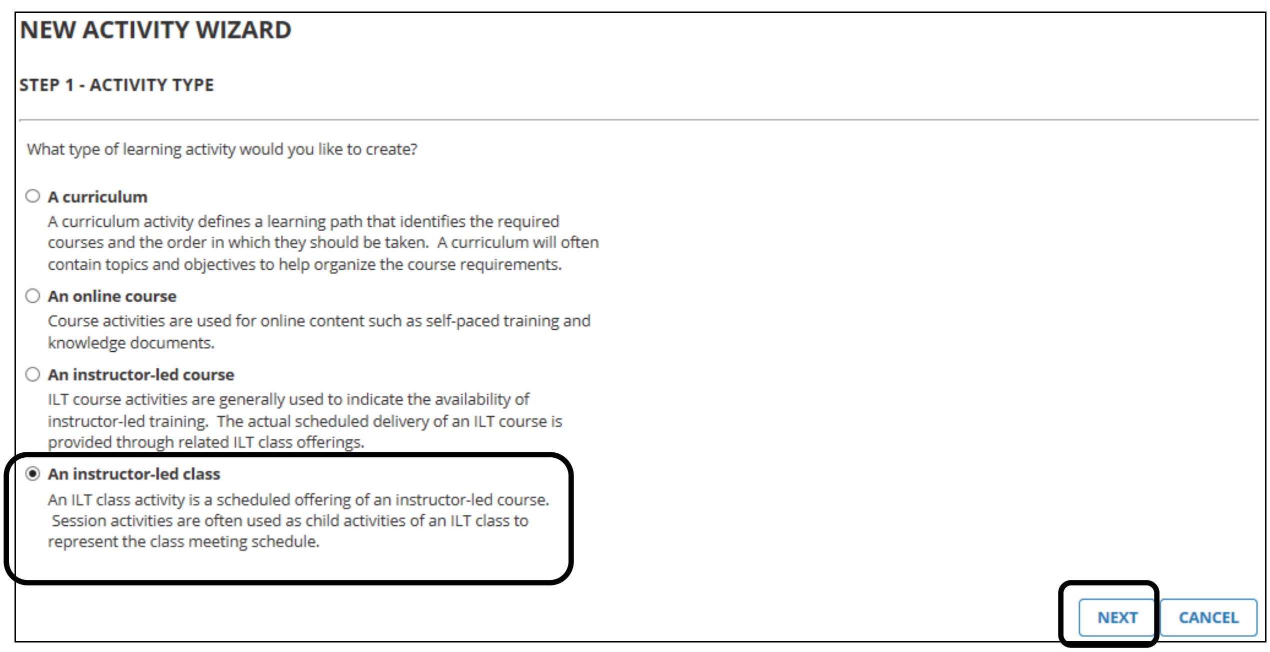
An ILT Class (Instructor Led) is a scheduled instance of an ILT course.

1. Hover the mouse over the **Administrator tab**
2. Hover the mouse over the **Learn menu**
3. Click New **Activity Wizard**.



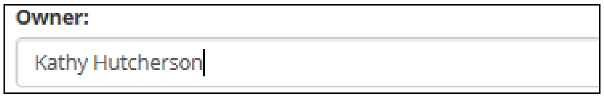

The New Activity Wizard page will appear (**Step 1 – Select an Activity Type**)

4. Select **An Instructor-Led Class** (Last Option)
5. Click **Next**

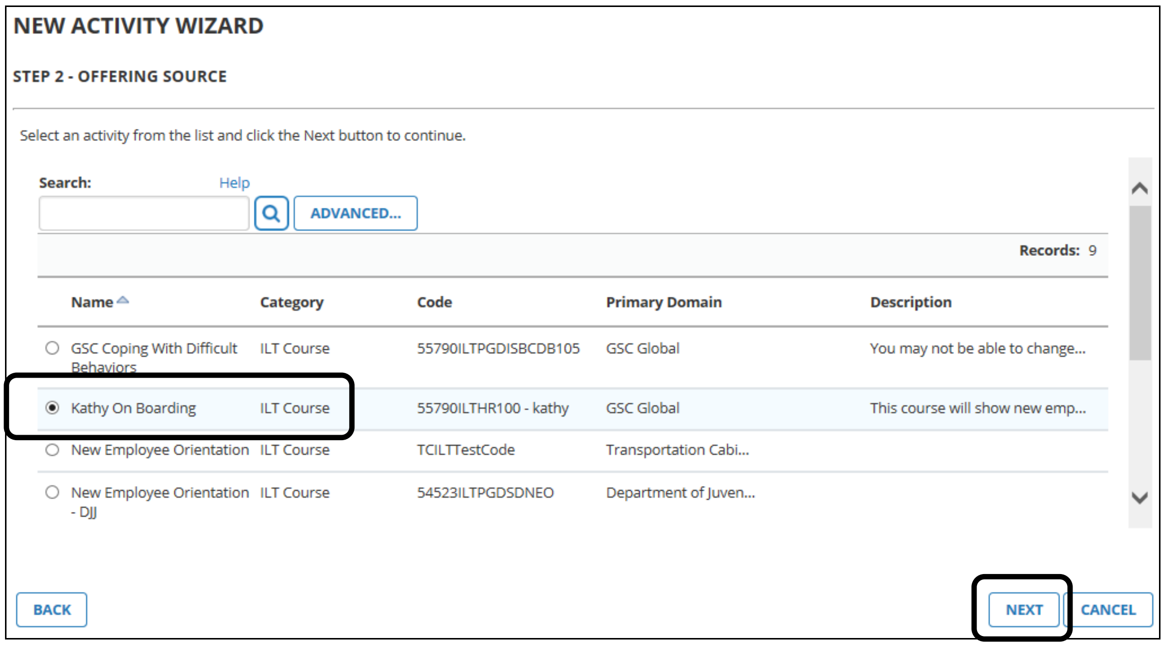


**Step 2 – Select an Offering Source** (we are looking for the ILT Course you created earlier so we can build our ILT class from the course.)

6. Click the **Advanced Search Button.**
7. **Enter your name** in the **Owner** field & click **OK.**




8. **Click the radio button next to your ILT Course & Click Next**



5. **Add the Start Date and Time** ***(Refer to your Student Card)***

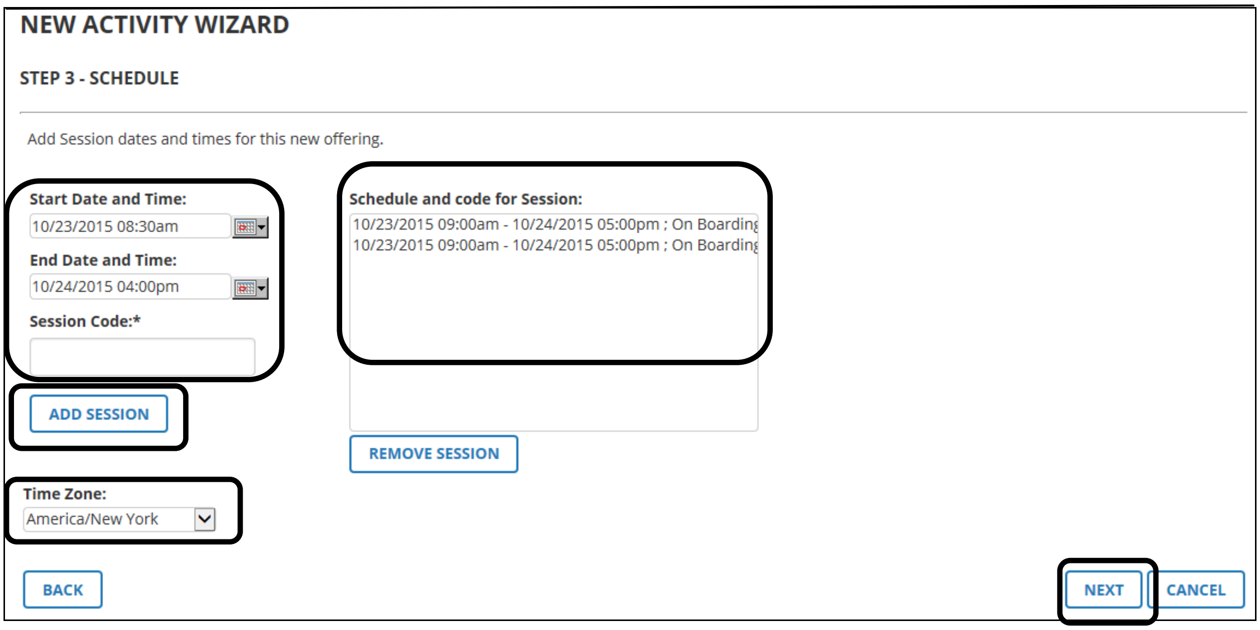
6. **Add the End Date and Time** ***(Refer to your Student Card)***

7. **Enter the Session Code** ***(Refer to your Student Card)***

8. **Click Add Session** to create a new session. If you make a mistake, highlight the session you no longer want and choose Remove Session.

9. **Set the Time Zone** for each session as necessary.

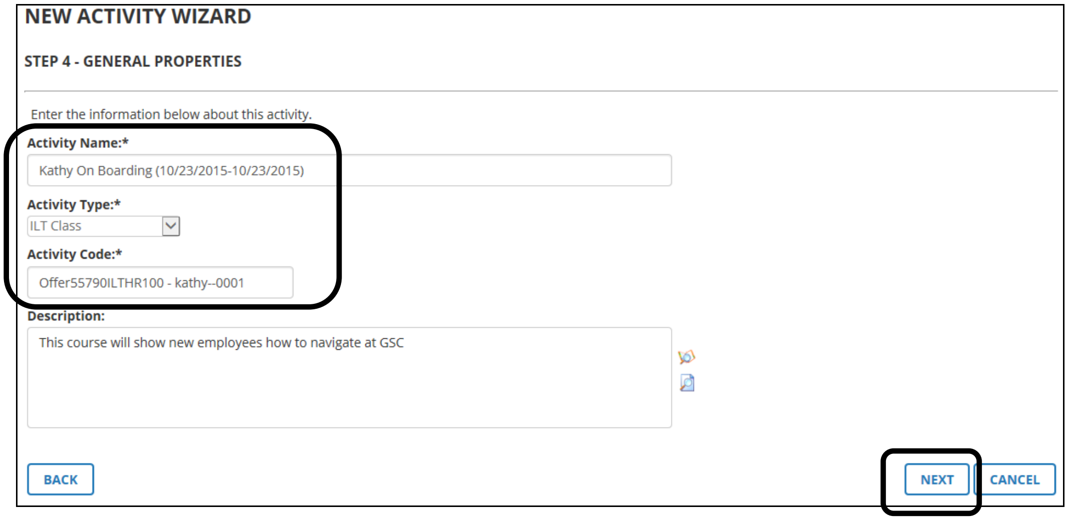
10. **Click Next.**




Step 4 – General Property's page appears.

11. **Activity Name**: **Give the ILT Class a name** similar to the ILT Course, but with a title that is descriptive of when the offering is or where it is located or who is offering the class. (note the default name which includes the date).
12. **Activity Code** is useful for tracking the ILT Classes you have added. **You may want to have a pattern** that is similar yet different from your ILT Course (for example if the ILT Course is PS001, your ILT Course for July 2015 could be PS001-J15). **Remove "Offer" and add your name and class date.**
13. The **Course Description** is useful to your Learner. What is the class about, what are your objectives, what is the Agenda? You can add HTML to make your display more eye-catching. If your Learners can choose their own classes, this description is especially important for them to be able to make informed decisions on the classes they need.

14. **Click Next.**




Step 5 – the Availability page appears.

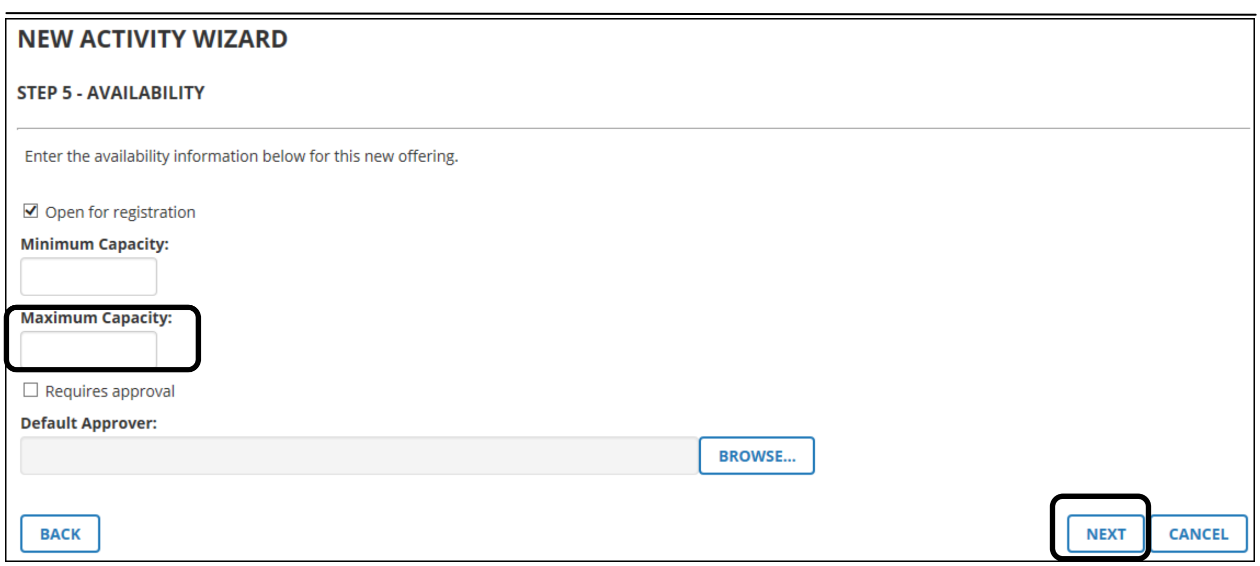
5. **Check Open for registration** so the Learners may register.

6. **Set the Maximum Capacity to (30)**

7. **Check "Requires Approval".**

8. **Add an approver** if there is someone who is controlling student registration. (add yourself for this example). This is an example of activity level approval. **Add yourself as an approver.**

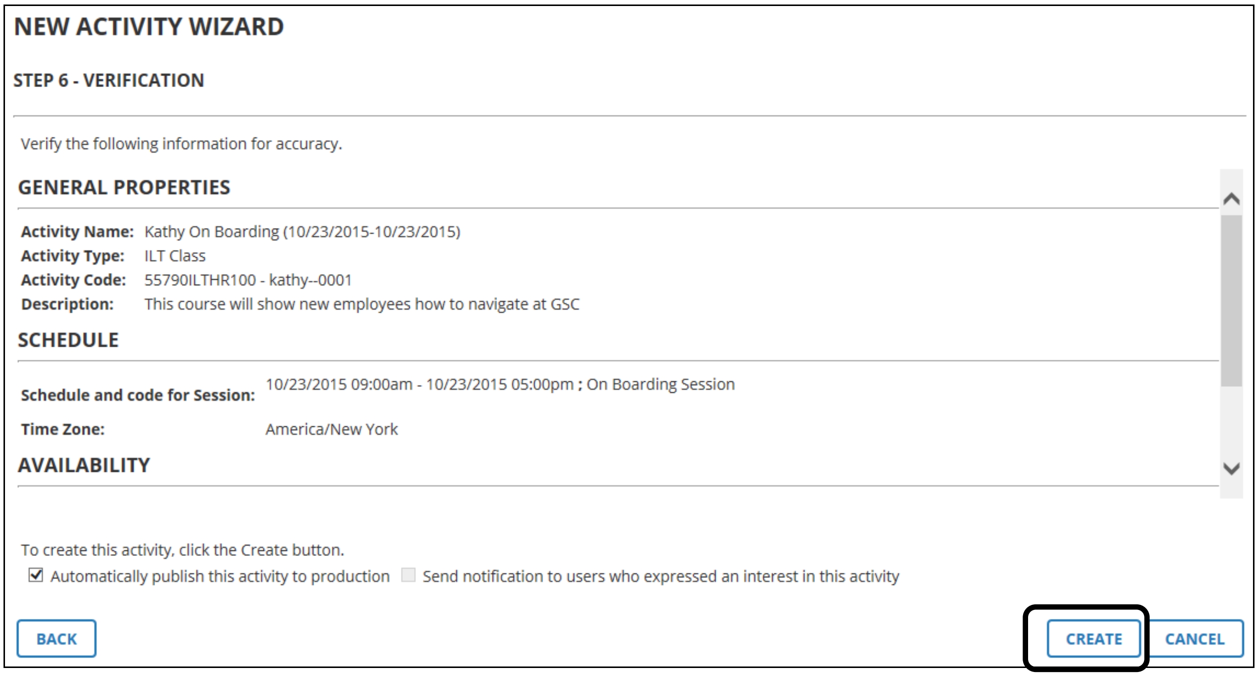
9. Click **Next.**



Step 6 – Verification page appears. Verify the information is accurate.

10. **Verify the ILT Class name and the information**. If there are any incorrect or missing pieces of information you may want to choose the Back button. Also, decide if there are any properties you would like to add. If so you may want to uncheck the automatically publish this activity to production option.

11. **Click Create to continue**.




The Assign Categories page appears allowing you to make your course available in the catalog.

12. Click **Human Resources**

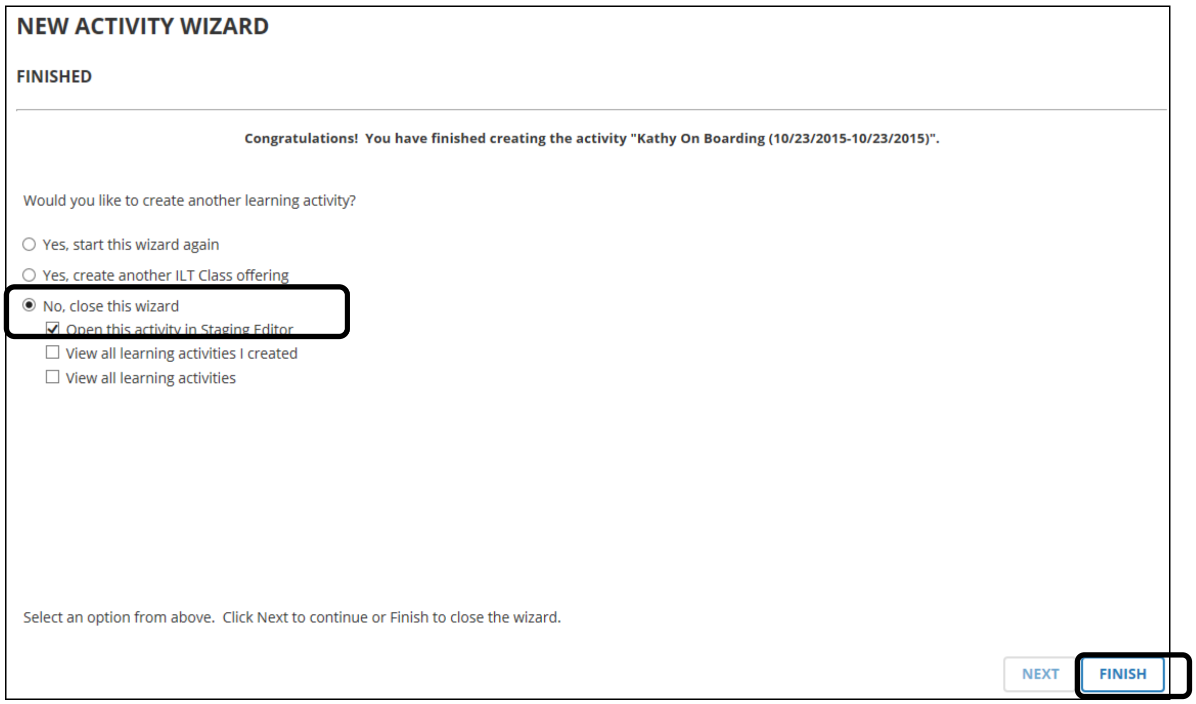
13. Click **Assign.**

The Finish screen will appear.

14. **Click "No close this Wizard"**

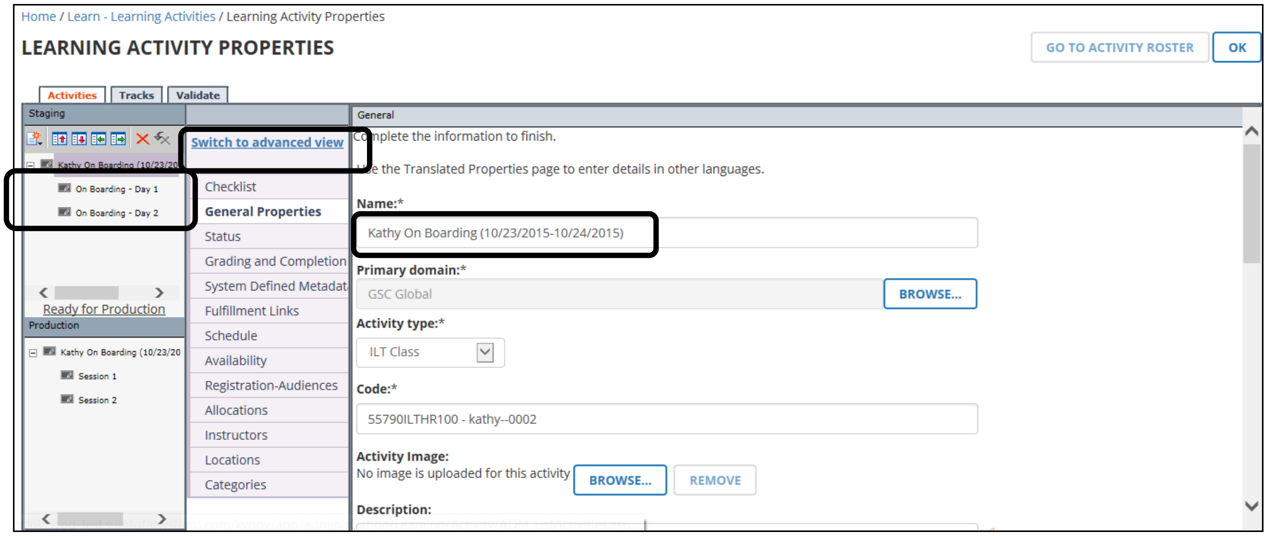
15. **Check "OPEN THIS ACTIVITY IN STAGING EDITOR".** (So we can make further updates to the class before making it available for registration.)

16. **Click Finish.** The activity will open in the staging editor and you will be able to add instructors, assign the activity and add other options.



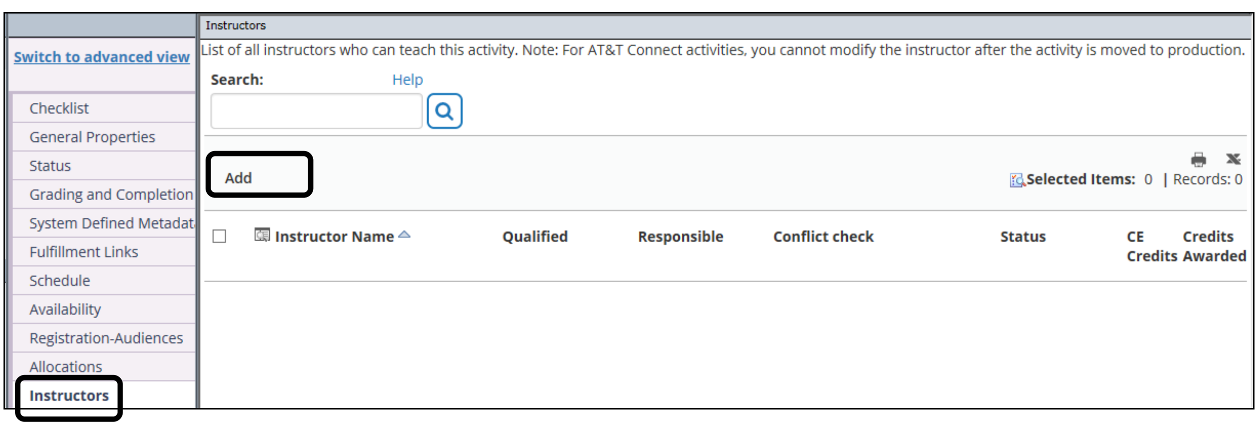

The Learning Activity Properties page opens.

17. **Click Switch to Advanced View.**
18. Click on **Session 1** in the Staging Area
19. **Change the name** for Session 1 & Click **Apply** (**Refer to Student Card**)
20. Click on **Session 2** in the Staging Area.
21. Change the name for Session 2 & Click **Apply**



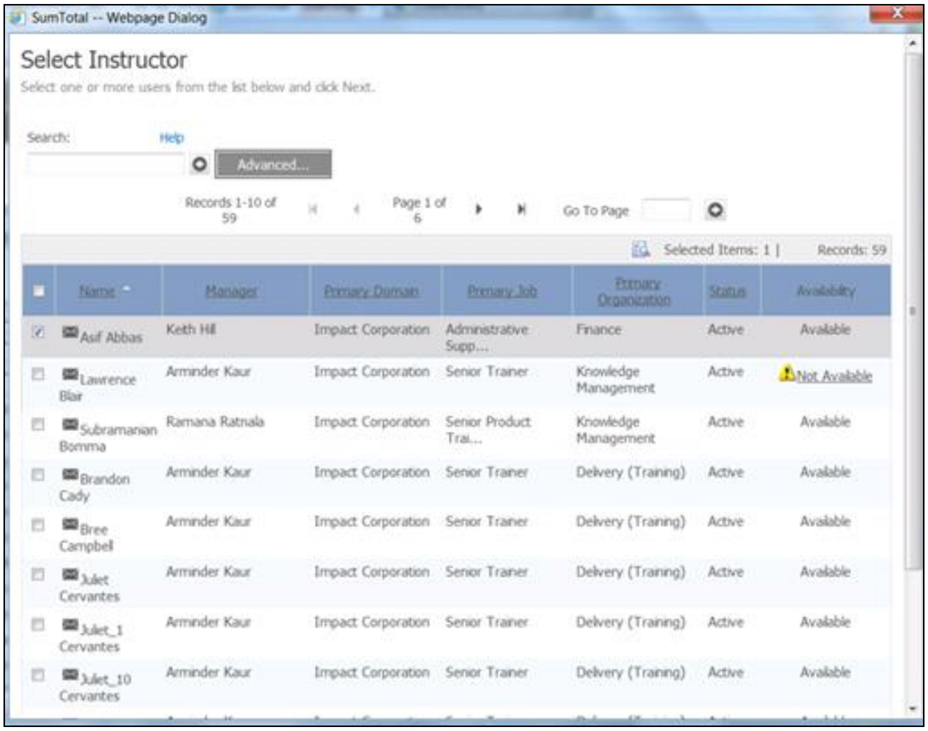
Click back on the main class name to select it.

22. Click on **Properties.**
23. Click on **Status** & Select **Can Be Copied**
24. Under the **RESOURCES** Category, **Click on the Instructor Properties**
25. **Click Add** to add instructors.

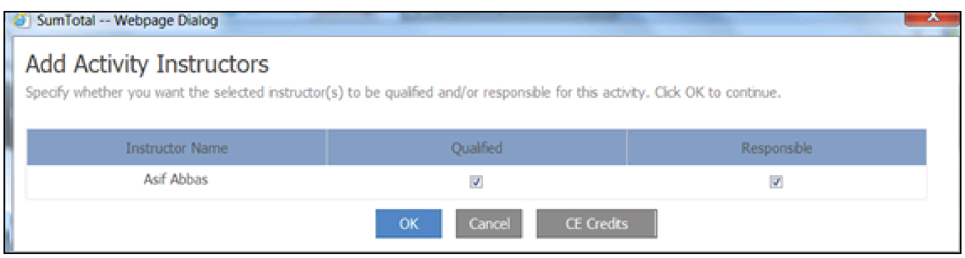


26. **Choose your instructor** from the list of available instructors.

27. **Click Next**.




28. **If the instructor is the primary trainer for the class, mark the individual as both Qualified and Responsible.** If the instructor is qualified to teach the class but won't be teaching this section, select Qualified only. **Choose OK.**




29. In the **Staging Window** on the left, **Click on Session 1** and hit the **big red X to delete the one day session.**

30. Move your ILT Class into production by **clicking the Ready for Production Link.**

31. Click **Move to Production**

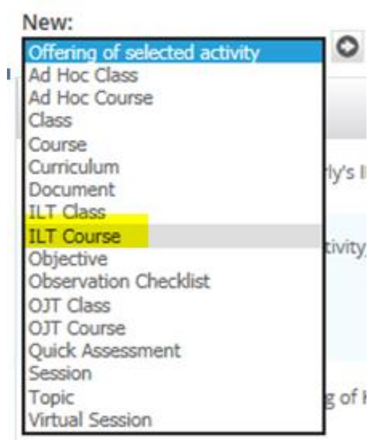
# Exercise 12 – Using the Learning Activity Page – Part 1

**► To Create an ILT Course that can be offered multiple times from the Learning Activity:**

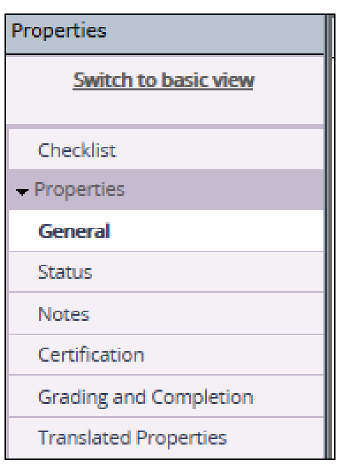
1. Hover the mouse over the **Administrator tab**
2. Hover the mouse over the **Learn menu**
3. Click on **Learning Activities**.

The Learning Activities page appears.

4. In the New drop down box select **ILT Course** & click **Go.**




5. Click on **Switch To Advanced View**
6. **Click Properties>General**.

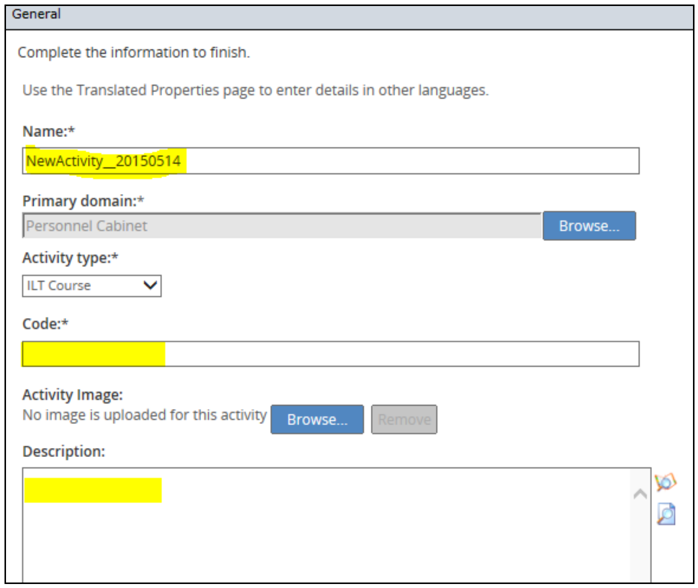



7. **Add your Activity Name.** (Refer to Student Card)

8. **Add your Activity code**. (Refer to Student Card)

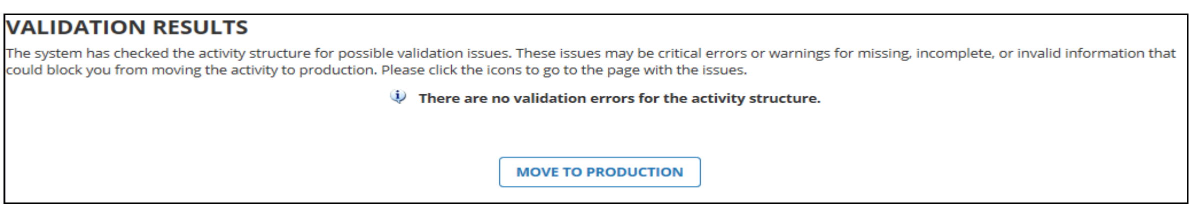
   NOTE it is important to remember to follow the KELMS Course Code Development Page in the back of this book. This is helpful for quickly locating your activity if there are others with similar activity names. You may upload a picture and a description that will appear to Learners on the activity details page.

9. **Add your Description & Click Apply.**




**Note:** If you are offering all of the ILT classes at one location, set the location at the course level.

10. From the **STATUS** Category, Select **Can Be Subscribed & Express Interest**
11. Click on **Grading & Completion –** enter hours in both **Estimated Duration** & **Estimated Credit hours.**
12. Click on **Notifications>System**
13. Click the **VIEW** drop down box **and select ACTIVE** (to see what's active)
14. Click the box beside **Notification Name** to select all notifications.
15. Click the drop down box under **TASK** and change it to **INACTIVATE** – **Click Go**
16. Click **READY FOR PRODUCTION** in the Staging Window.
17. Click **Move to Production**




18. **Click the OK** button in the top right corner.

**Congratulations! You have created your ILT Course!!!**

## Part 2: Now Let's Create an ILT Class Offering From the ILT Course.

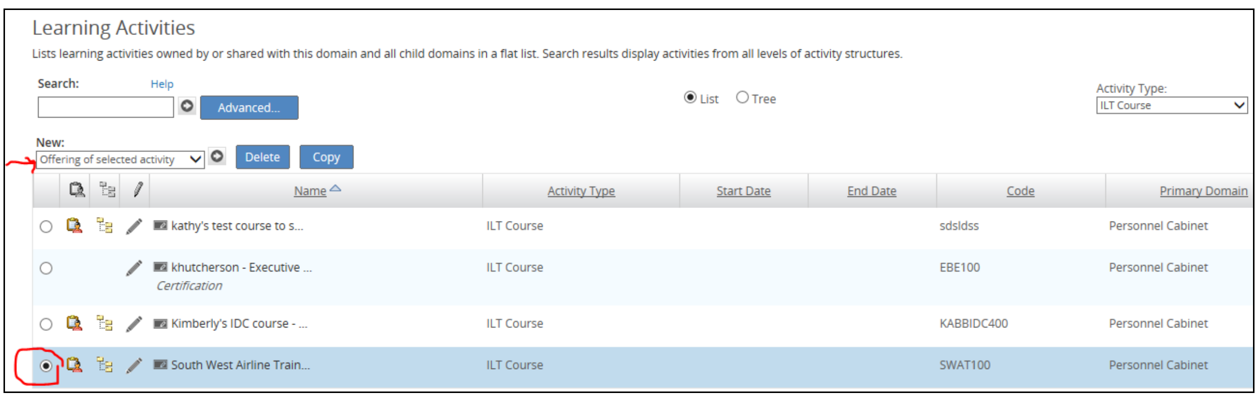
1. From **Administrator**, Choose **Learn** and then **Learning Activities**.
2. Click on **Advanced** to search for your ILT Course that you just created
3. Enter your name in the **OWNER field** at the bottom right hand corner.
4. Click **OK**

5. **Choose the radio button next to your ILT Course**.

6. From the **New: dropdown menu**, **Choose Offering of Selected Activity**

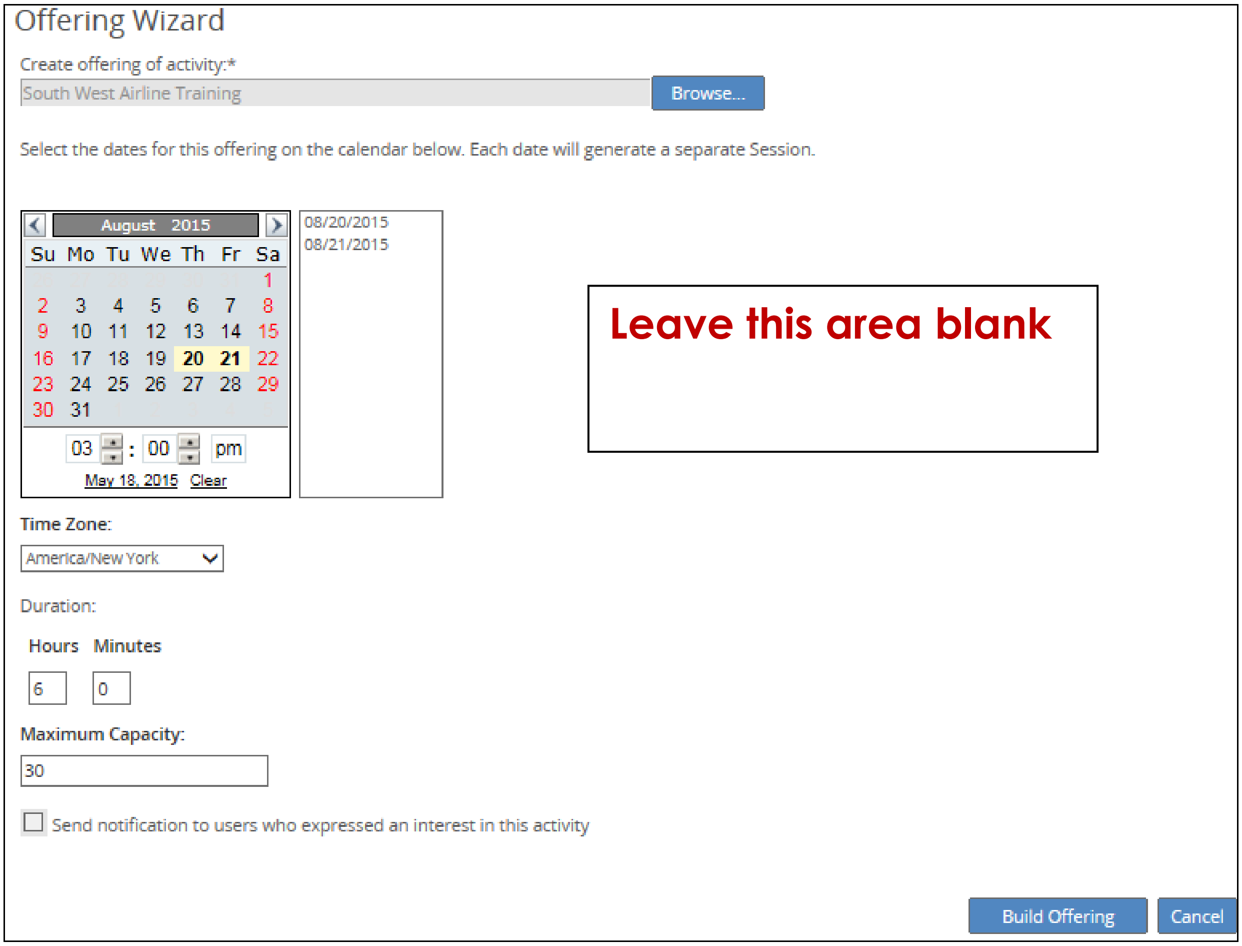
7. **Click the arrow**.

These steps are **CRITICAL** if you do not create the ILT Class in this way, the ILT Class will NOT be associated with the ILT Course you just created.




The Offering Wizard page will appear.

The name of your activity should auto-populate.




**Note:** If any Learners express interest by registering for the ILT Course, they will receive an automatic notification that the class is available when you publish.

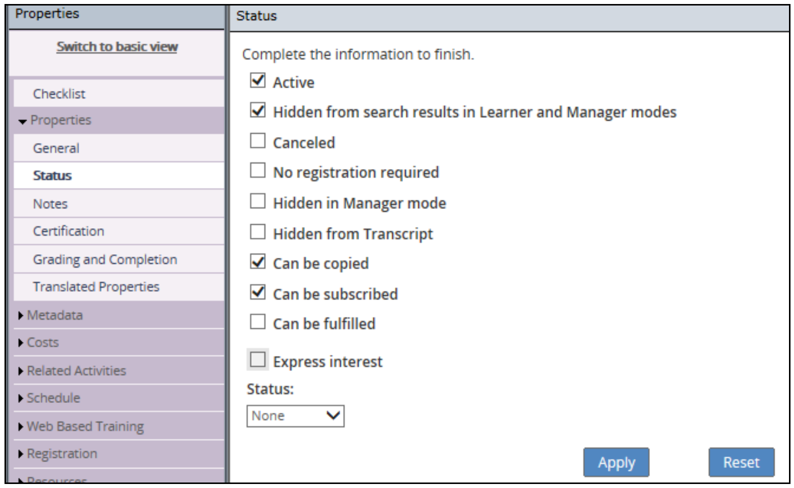
8. **Choose Build Offering**

On the far left panel of the screen, please note you have 2 sessions created. (one for each day of the activity). Any time you are working in this activity, it's important to know which session you are on. Please note the highlighted session on your screen right now.

9. **Click on SWITCH TO ADVANCED VIEW** (Note that Session 1 is still highlighted)

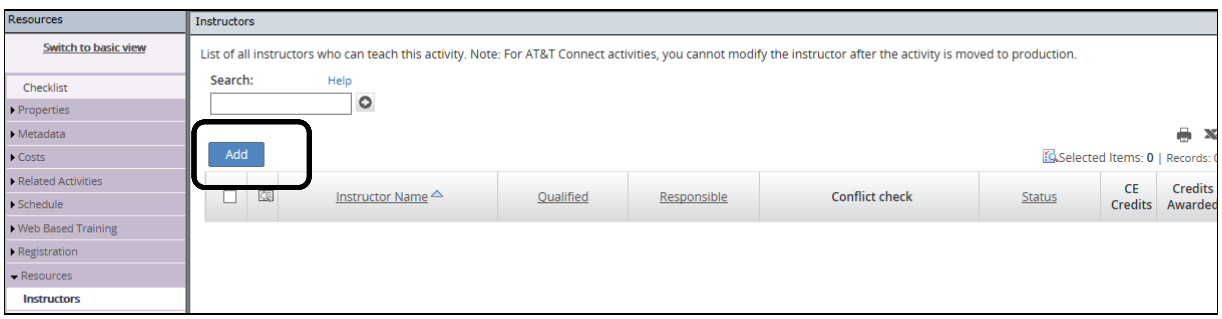
10. **Under Properties>General - Modify the name** by removing the words: "OFFERING OF".

11. Under the **Status**, **Select "CAN BE COPIED" & "CAN BE SUBSCRIBED"**

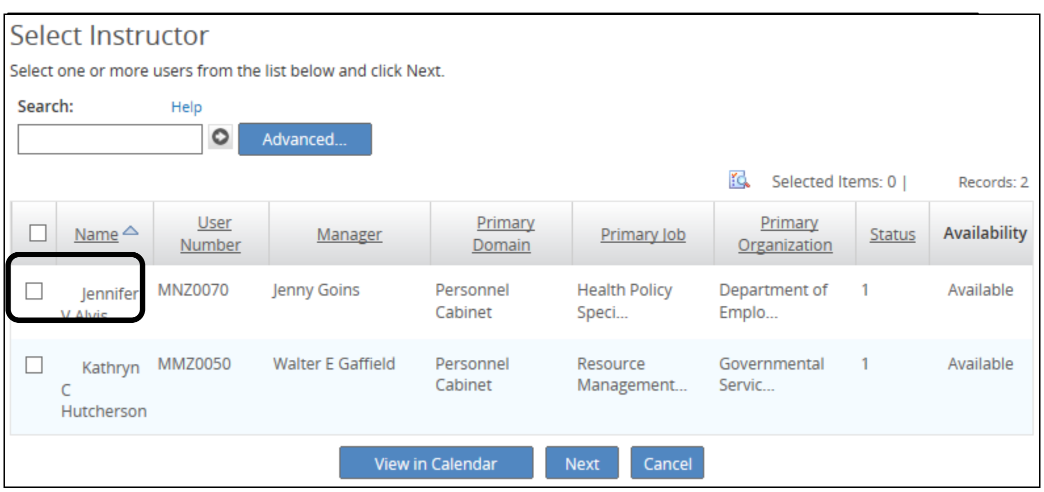



12. **Click Apply**
13. ***Under Grading & Completion Enter Estimated Duration & Hours*** ***(Refer to your Student Card)***
14. **Click on the Resources Category**

15. **Click on Instructors Properties**



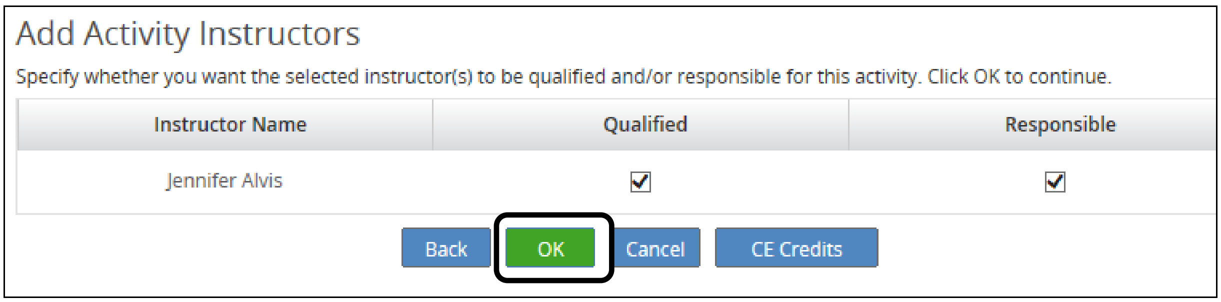

16. **Click the Add button** to add the instructor to the class.
17. **Check** the box beside **the instructor** & **Click Next**



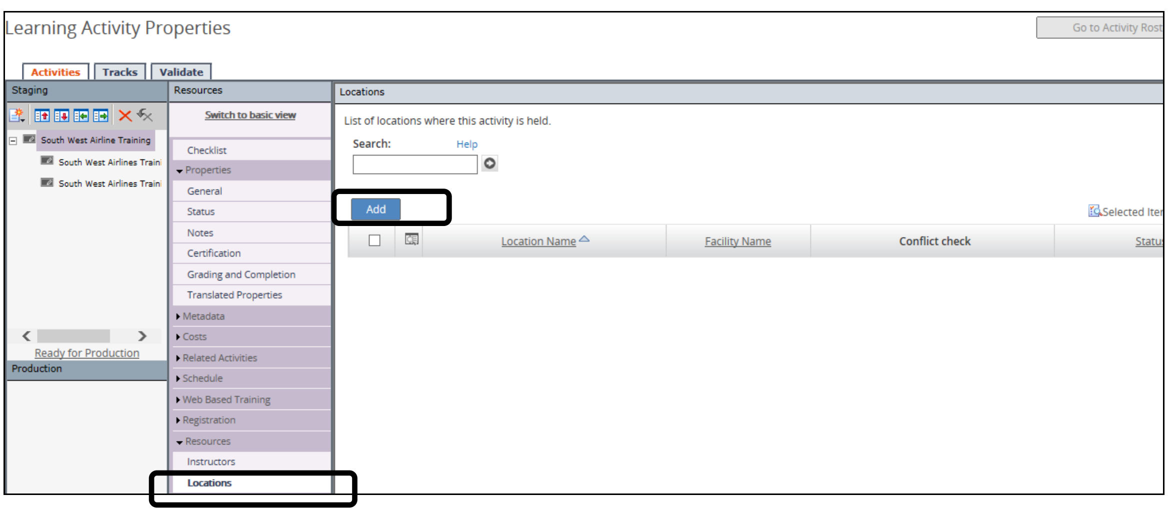
Instructors are a commonly used property. Adding instructors allows them to:

- Get notifications when Learners register for their class
- Allows instructors to plan their training schedule
- Ensures instructors are not double booked

**32.** If the instructor is the primary trainer for the class, mark the individual as both Qualified and Responsible. If the instructor is qualified to teach the class but won't be teaching this section, select Qualified only. **Choose OK. (top right corner)**



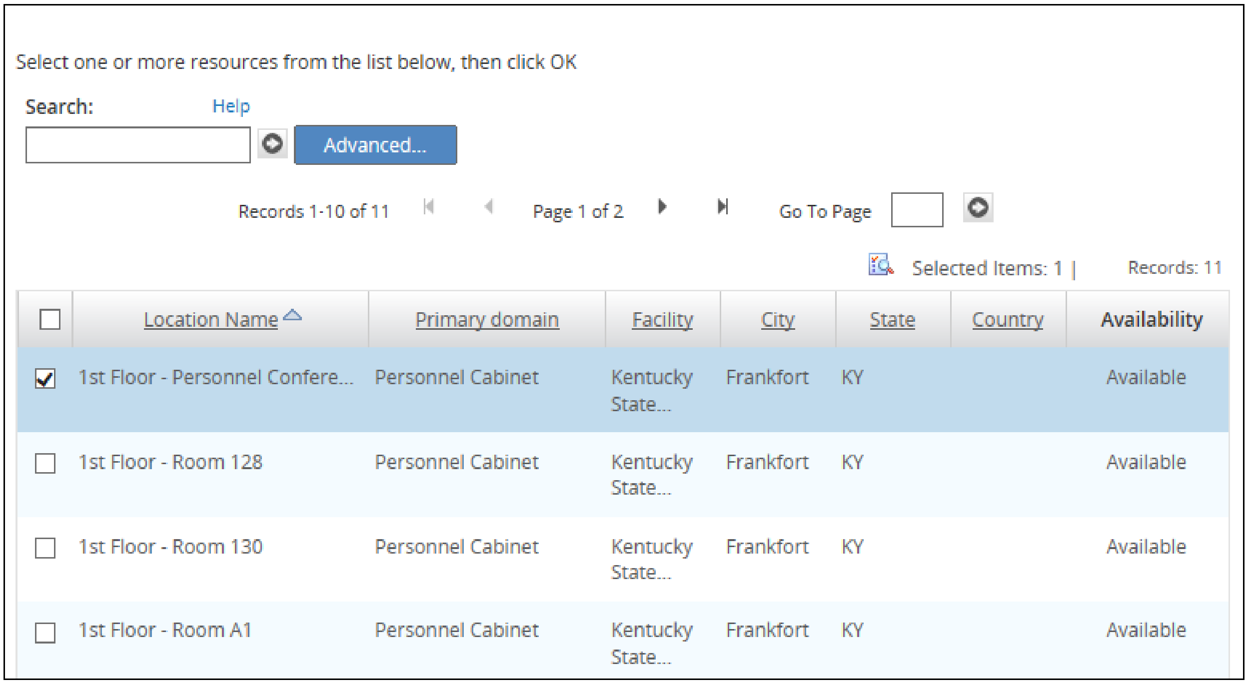

18. **Choose Locations** from the advanced view of the properties menu to add your location.



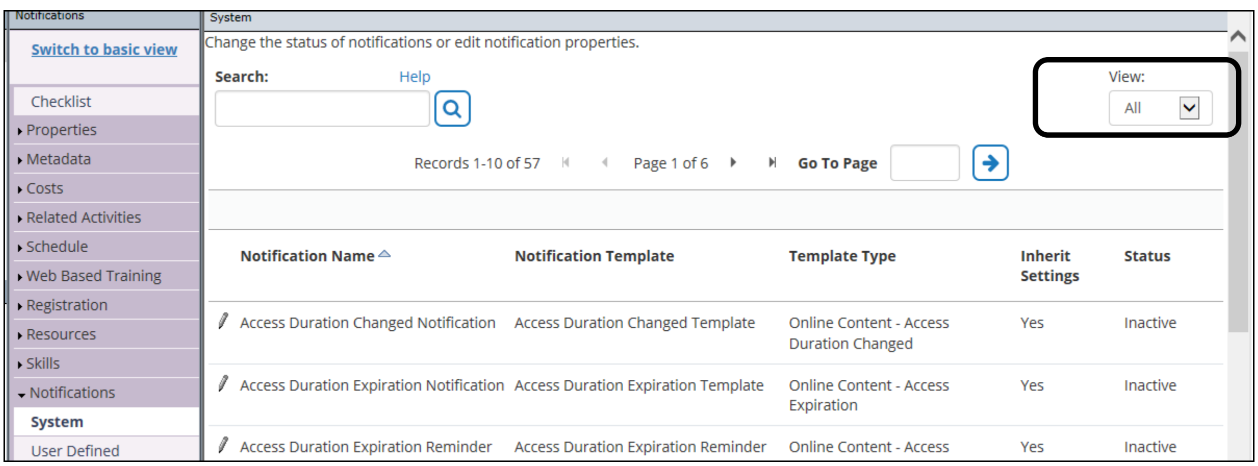

19. **Click Add** to choose the location most appropriate for your training.

20. **Check the box that applies**

21. **Click OK (at bottom)**

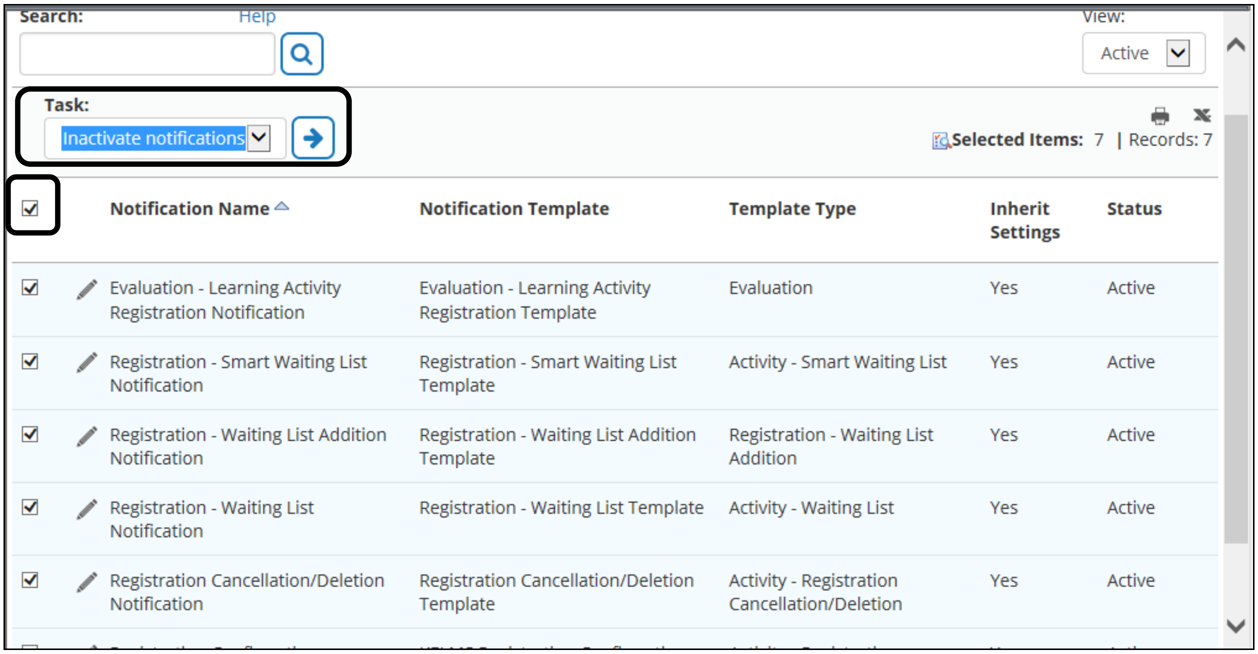



22. Click **Notifications**
23. Click **System**
24. In the drop down box under View, **Select Active** to view all active notifications



**To inactivate notifications for training that has already taken place:**

1. Check the box beside Notification Name and that will select all notifications on that page.
2. In the Task window change the drop down to Inactivate notifications and Click Go.
3. If any notifications remain on the screen as active, make sure to follow the same steps to inactivate them as well.




**25. Go to Grading & Completion** and make sure the **number of Child Activities** match the number of Sessions. **Enter a 2 in the field.**

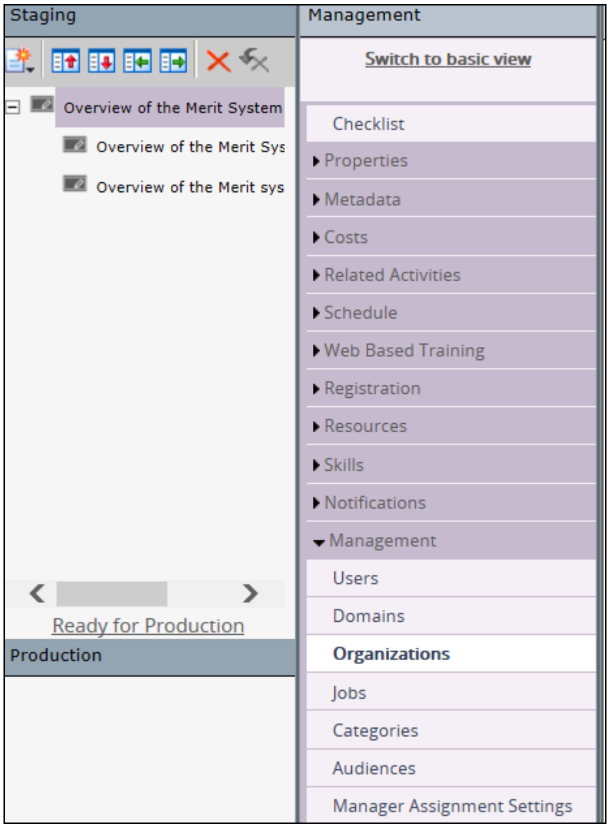
**If both sessions are required for completion of class, place a check in the box for each session and Click Apply.**

- Contribute to parent activity completion
- Required to be complete

**NOTE:** While still in staging it's possible to assign participants to the class you are creating.

- If you wanted to assign this activity to your team, you could do so by choosing Management and then Organizations.
- You may assign training by Domain, Organization, Job type, or a specialized Audience that you create.

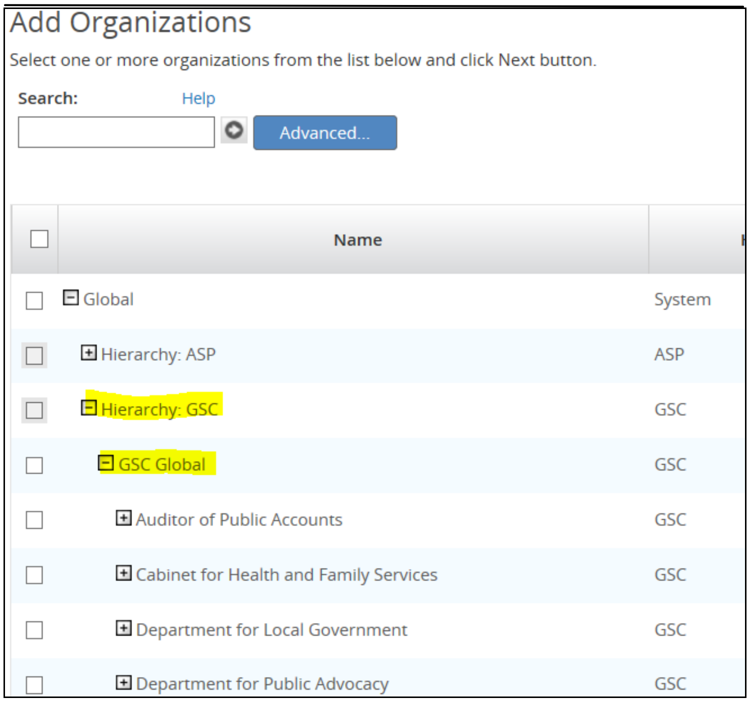
Click on **Management>Organizations**




For class purposes, we are not going to assign this training to anyone.

26. Click **Ready for Production**
27. Move to **Production**
28. Click **OK**

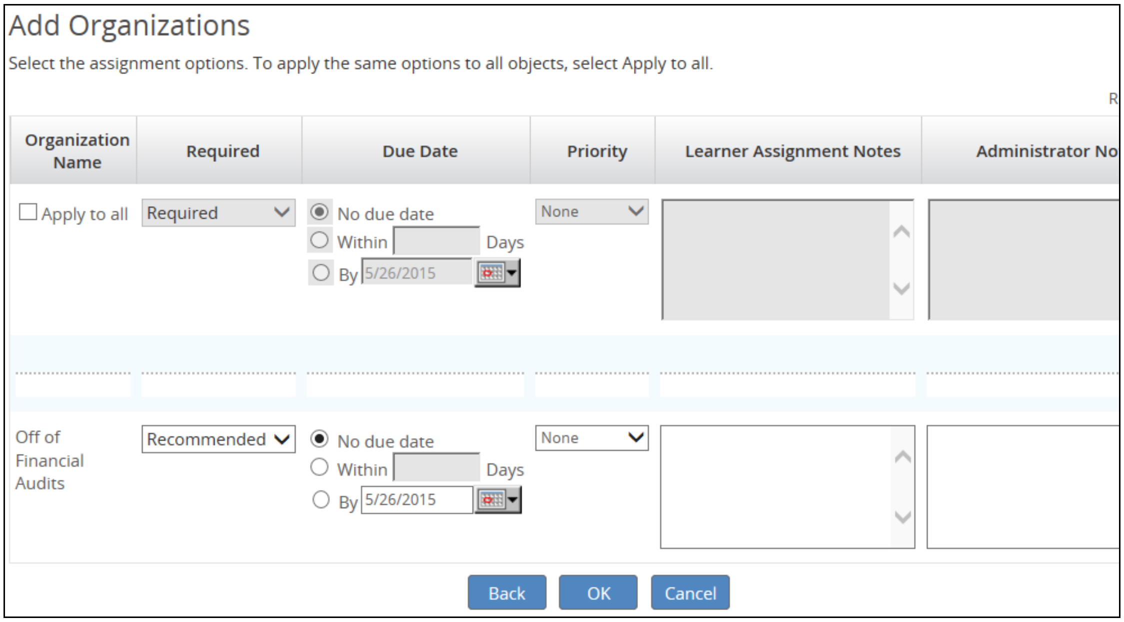
Here you would choose the organization that needs your training.




Here you would choose the options for assigning training. Note these options are the same whether you are assigning by user, Job, Organization or Audience. Apply to All will apply to all of the groups (or individuals if you are assigning by user) that you have added.

Required/Recommended: Your Learner will see this under Assignment Type it will appear in the description of the activity on the ToDo List.

- **Due Date**: Your Learner will see this under Assignment Type it will appear in the description of the activity on the ToDo List. It will also trigger over-due notifications if you set a date.
- **Priority**: Your Learner will see this under Assignment Type it will appear in the description of the activity on the ToDo List.
- **Learner Assignment Notes**: Anything you add here will appear on the Learner's Activity Summary page along with your Activity Name, Additional Information, Requirement Details why the Learner requires this training-because you are assigning the entry will show as Direct Assignment
- **Administrator Notes** will appear beside your activity in the Work space once you click ok.




Once you move the activity to production, these people can view the training in their ToDo List.


Here you would validate that your activity is Ready for production with no errors. – THIS STEP WILL CHANGE.

And click done.

# Certifications (Skip)

Certifications are best used when you need to have Learners take training over and over again on a regularly scheduled basis. Any activity type can be a certification.

Use certifications to automate courses that Learners must take on a scheduled, regular basis. Common uses include: compliance training (such as sexual harassment training), CPR and first aid training, or financial legal training.

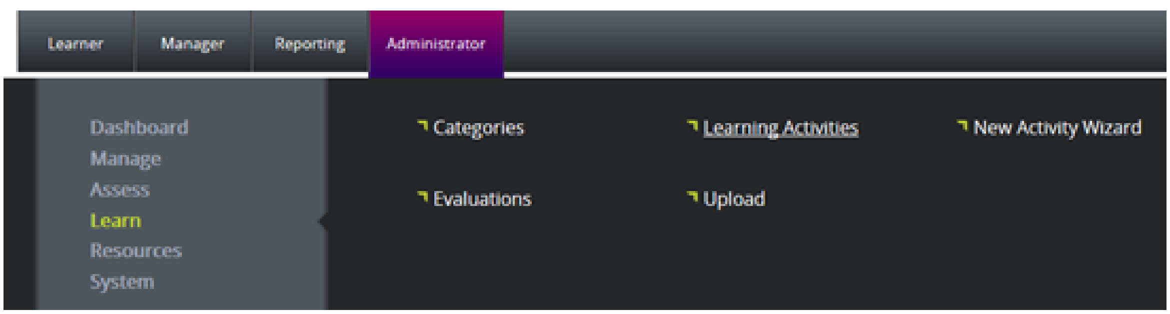
Certification classes need to be mandatory and recertified on a yearly basis.

## Creating an ILT Course as a Certification (**Skip During Training**)

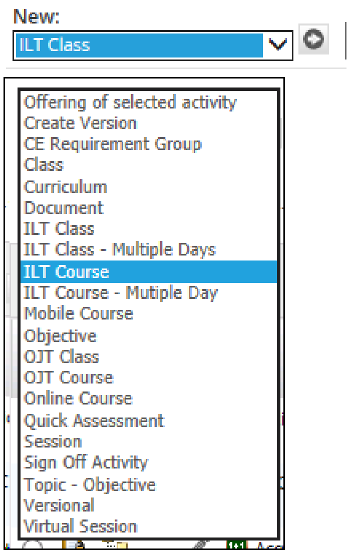
### ► To Create an ILT Course as a certification

**Step 1**. - Create your ILT Course.

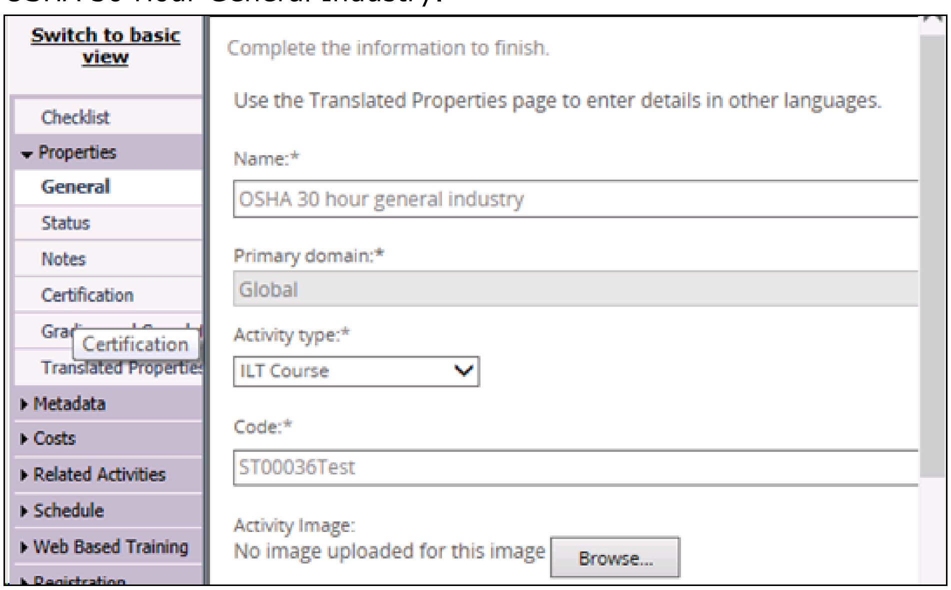
1. From **Administrator** go to the **Learn Menu**> **Learning Activities** menu.



- **Step 2.**
  2. On the Learning Activities page, **choose add New: ILT Course** and **click the arrow**.




- **Step 3.**
  3. **Switch to the Advanced View**
  4. **Expand the Properties>General** menu and **name it**. In this case, we call it OSHA 30 Hour General Industry.




- **Step 4.**

  Choose the appropriate settings for certification.

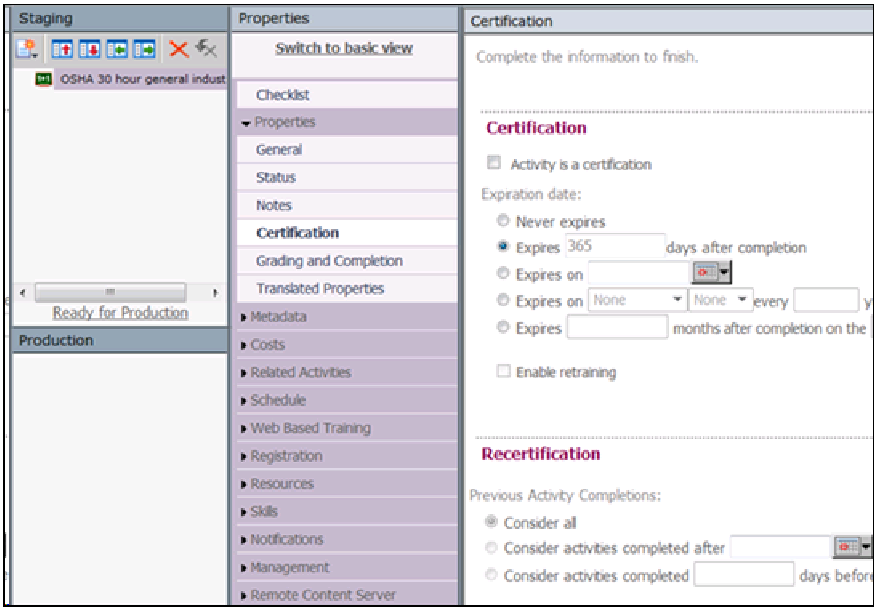
  a) **Activity is a certification**,

  **b) Expiration Date**

  On (choose a date 1 year after the training is complete or after 365 days, etc.)

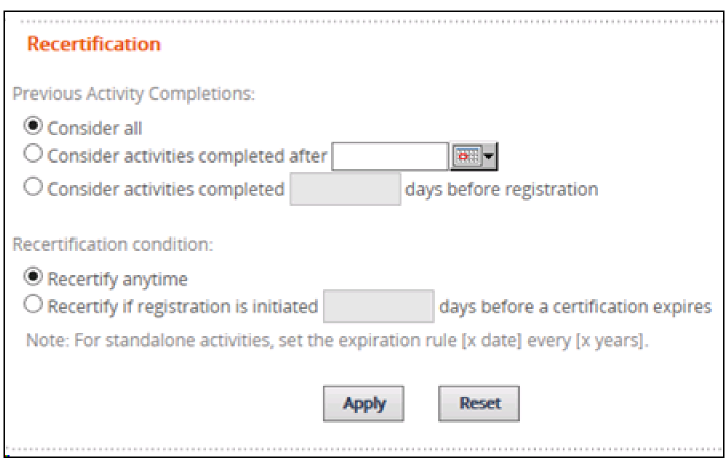
### c) Enable retraining

If the training is updated in any way, assignment status will change for the Learner.




- **Step 5**

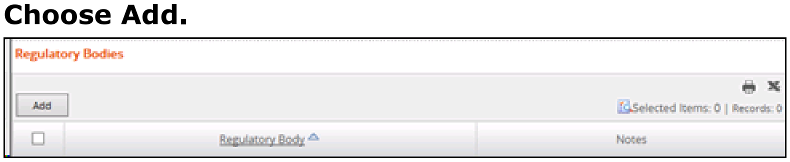
**Choose the appropriate settings for Recertification**. If you need to, update the certification activities.



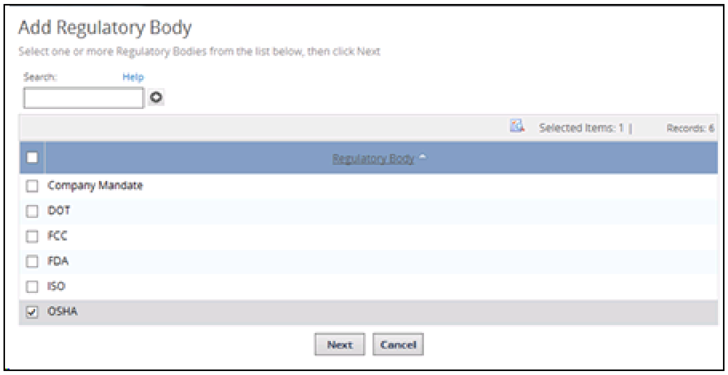

- **Step 6.**

**Choose the Regulatory Body** associated with the training.

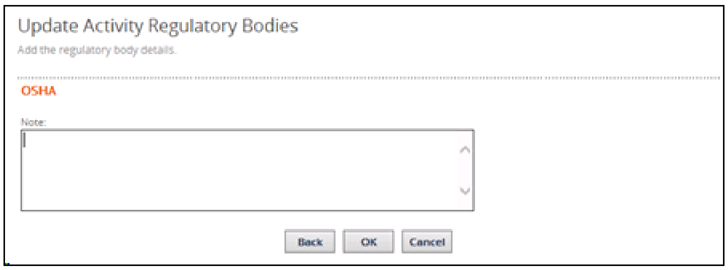
**Choose Add.**



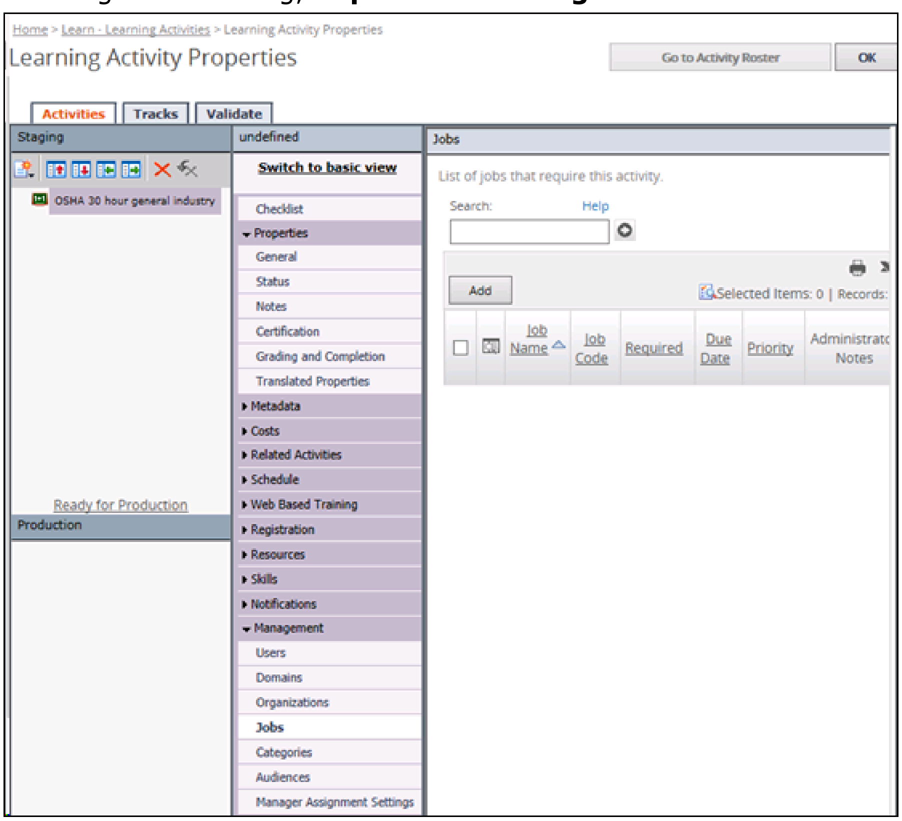
- **Step 7.**
  **Choose the Regulatory Body** and **click Next.**




- **Step 8**.
  You may add details about the agency and **click OK**.

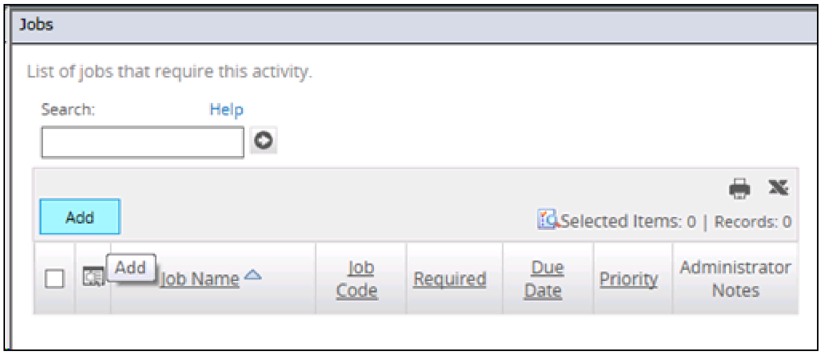



- **Step 9**.
  To assign the training, **expand the Management menu**.



- **Step 10.**

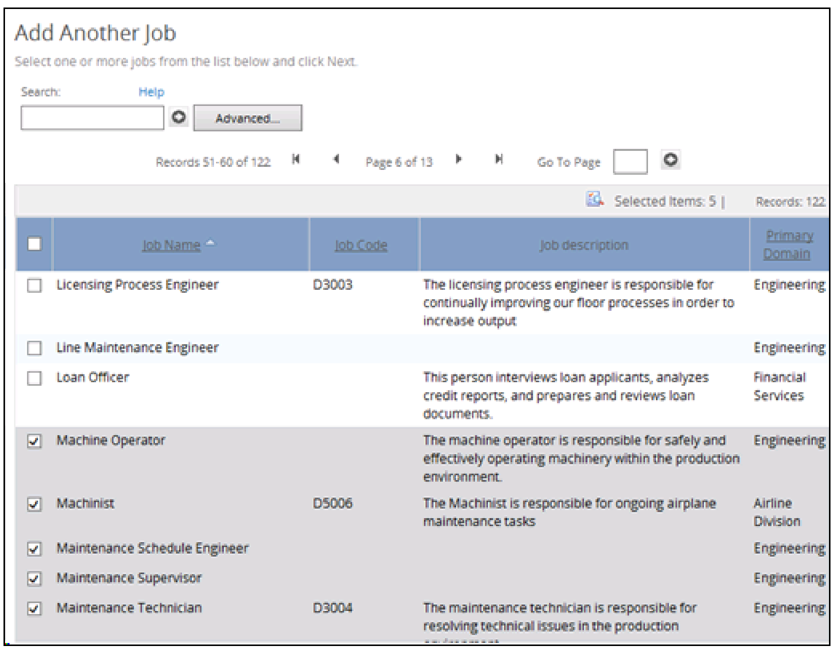
  **Choose the Jobs** that must have the training.  You may also choose by organization or create a new audience.



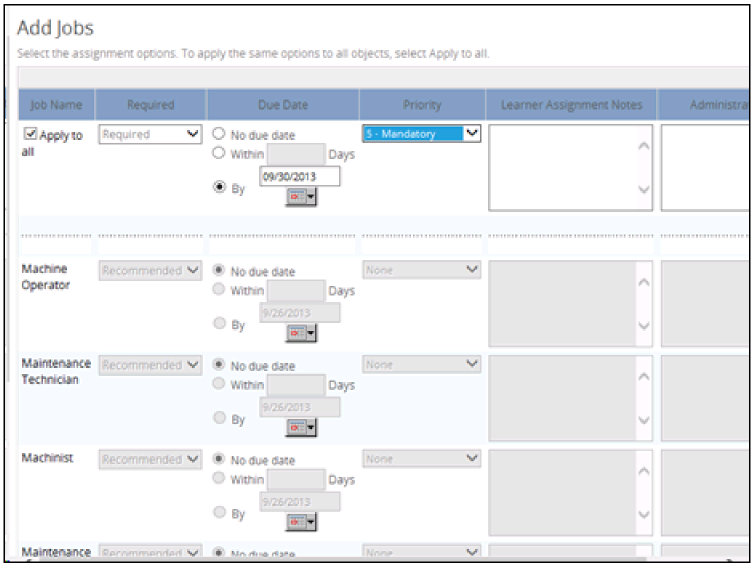

- **Step 11**.

  **Assign the certificate to the Jobs you deem necessary**.

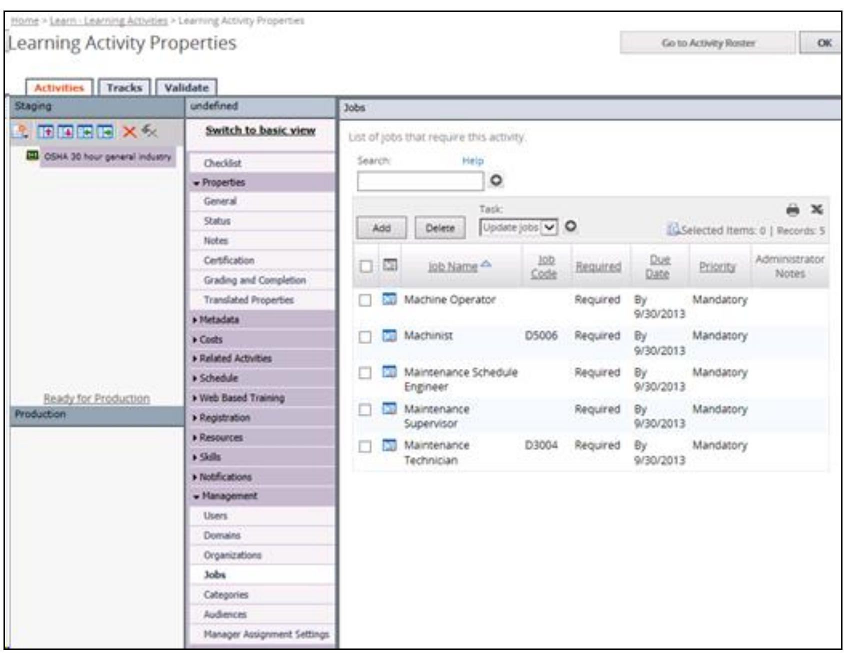
  **Click Next.**



- **Step 12.**
  **Choose** the appropriate **Assignment options**.
  **Set Requirement, Due Date, and Priority**.

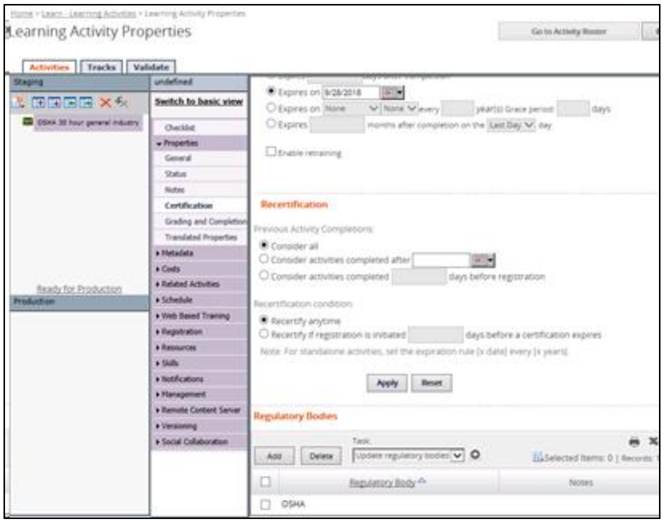



- **Step 13.**
  Your training has been assigned.



- **Step 14.**

  Once you put the course into production, you are ready to offer an ILT class with times and places.



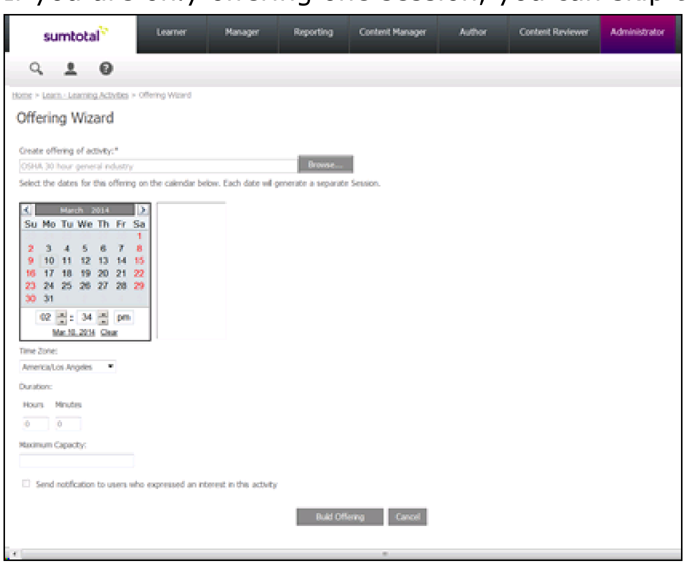

- **Step 15.**

  Select the ILT course. In this case, select OSHA 30 hour general industry.


- **Step 15.**

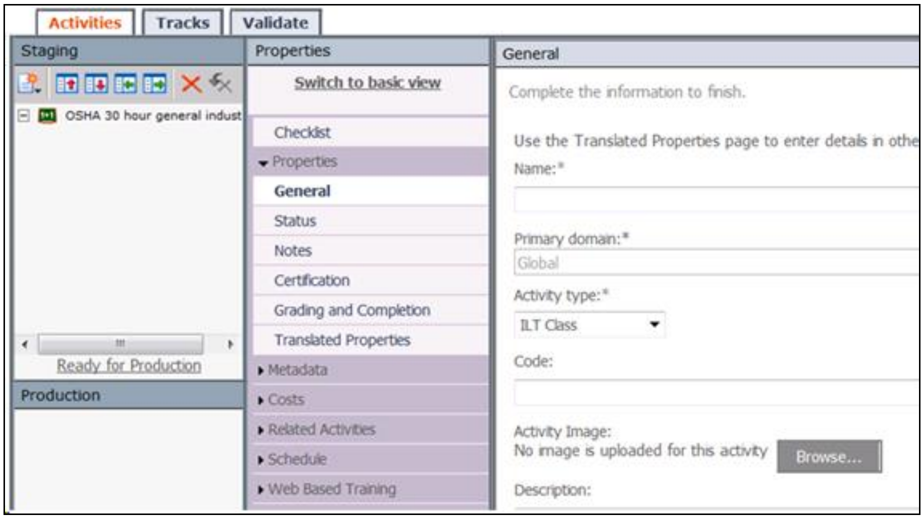
  **Select the dates** to offer the ILT class.

  If you are only offering one session, you can skip this step and choose Build offering.



- **Step 16**.

  **Rename the session** so that the group knows when they need to take the training. Now your users are ready to register for the training.



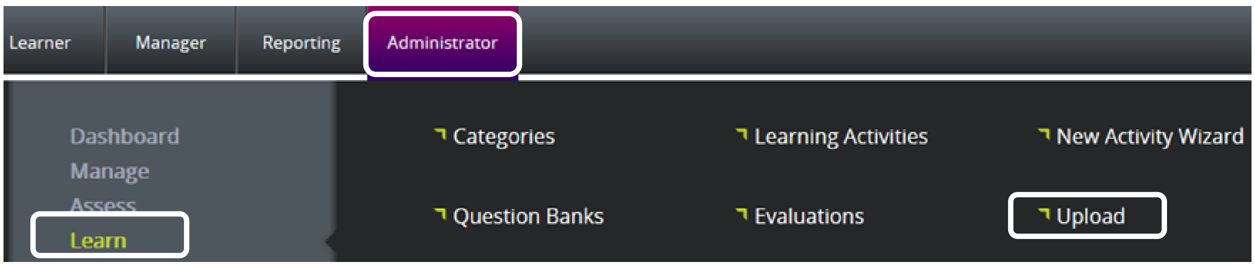
# Uploading a Document

KELMS allows you to upload a variety of documents. When you upload a document, you can create an activity based on this document:

- Upload E-learning in a SCORM, TinCan, AICC compliant format.
- Upload powerpoints, videos, etc. that you would like to share as a learning activity.

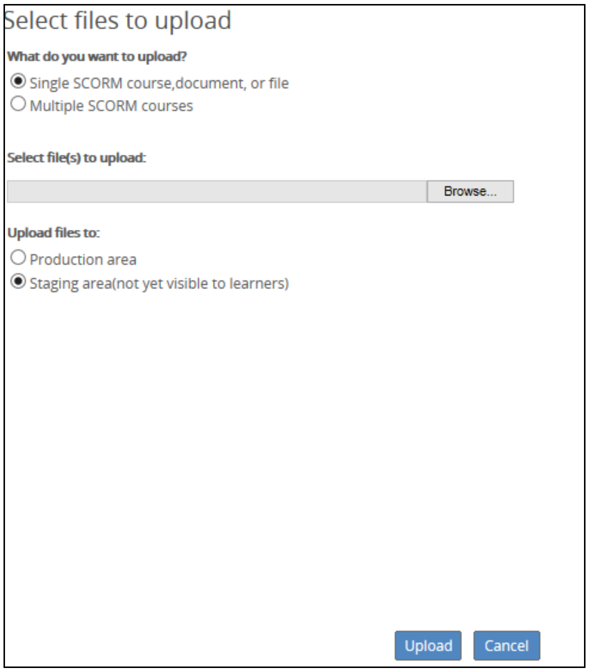
*Upload a document*

1. From **Administrator, Select Learn> Upload**




2. **Click Upload Files** to locate the file you want to upload.

3. **Move the structure to staging** so that you can set important properties.




There are 3 sets of properties that are essential for you to create this document.

4. **Add a name for your document**.

5. **Choose Generic document** for your launch method. If it is of a common type, like a pdf, choose one that matches your document. If you are unsure of the type of document you have, the general document will be your go to choice.

6. **Choose No registration required**. This allows end-users to access the document without needing to register once for your curriculum and another time for the document.

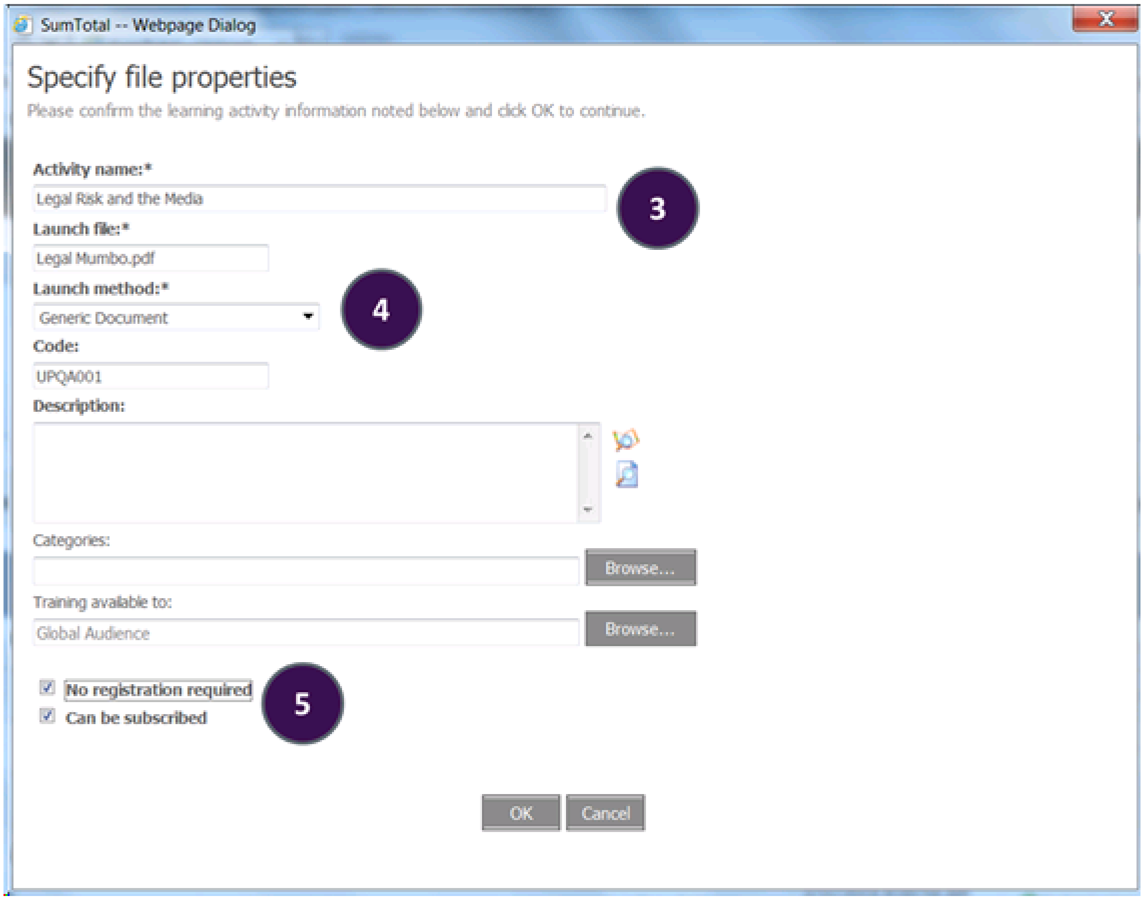
7. **Click Ok and the document begins the upload process** (note the status on the right hand side)

8. Once in Staging, **Select your File and click Move to Production.**

9. **Click Move to Production one more time**.

10. **Go to Learner Dashboard and search for the activity you just uploaded**.

11. **Click the Start Button to view it**.




### *Create a Quick Assessment*

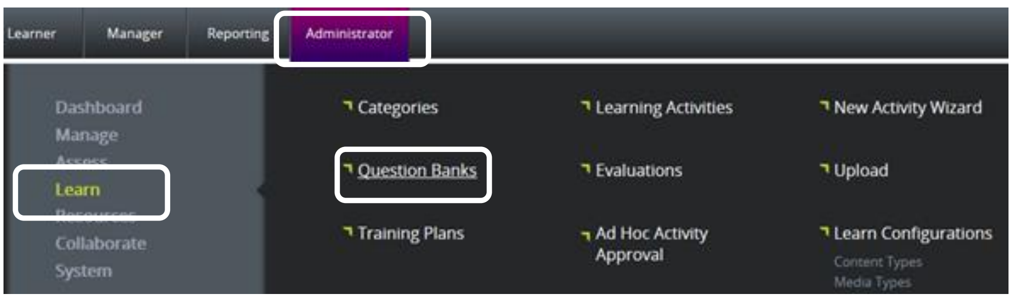
**A Quick Assessment allows you to create a quiz/test** for a given subject for learners to take. You can use Quick Assessments for:

- As a stand-alone activity to assess and test learners.
- For content that can be reused in multiple learning structures.
- To track the knowledge levels of learners towards a single learning goal.

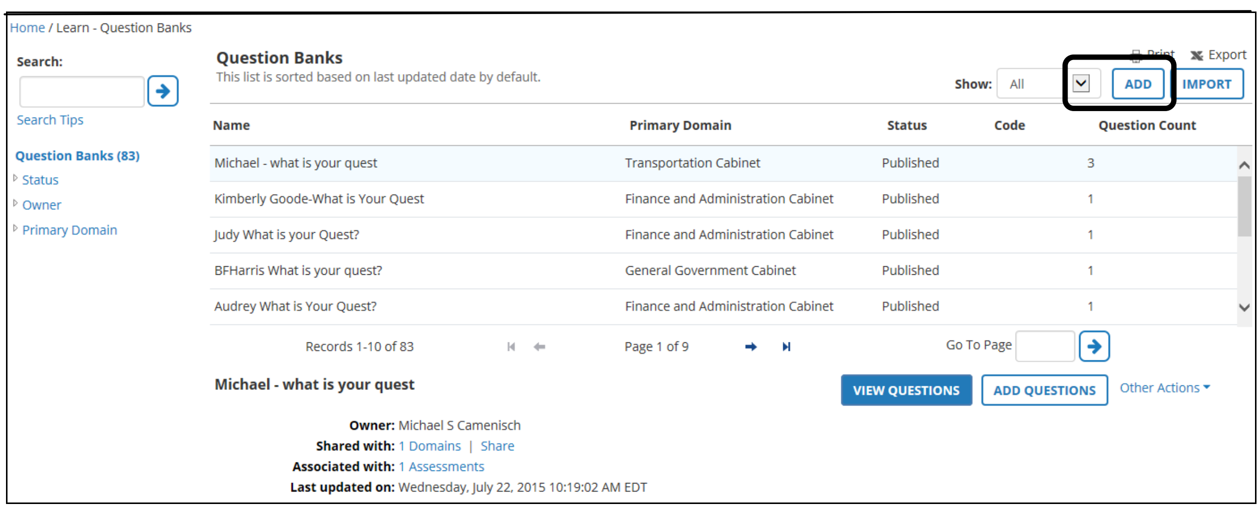
## Create a Quick Assessment

### Exercise 13 – Create a Question Bank

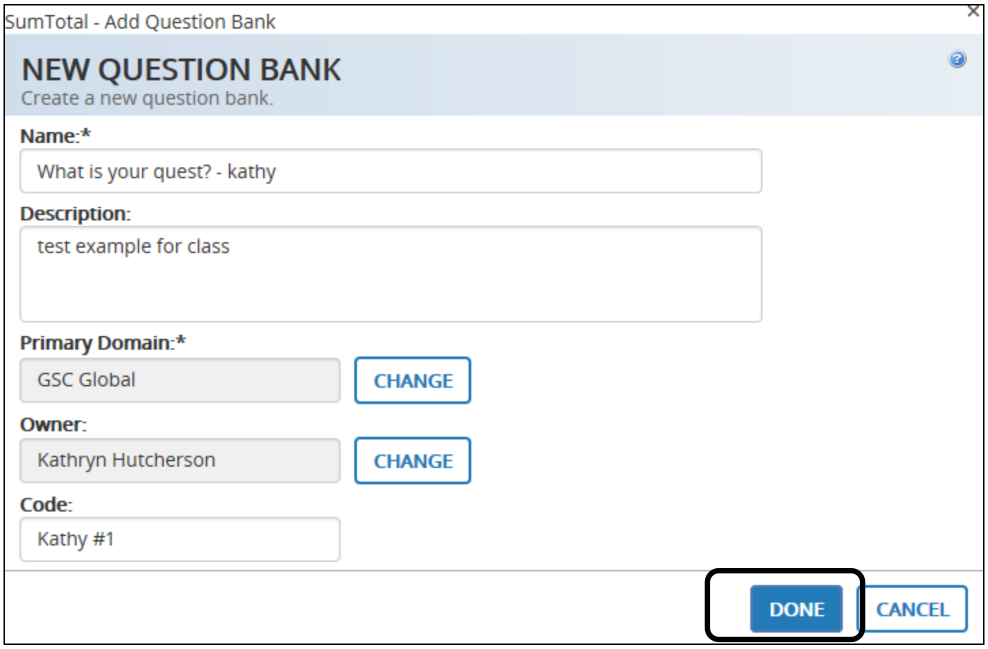
1. Hover over the **Administrator** tab
2. Hover over the **Learn** Menu
3. Click on **Question Banks**




4. **Click the Add Button**.

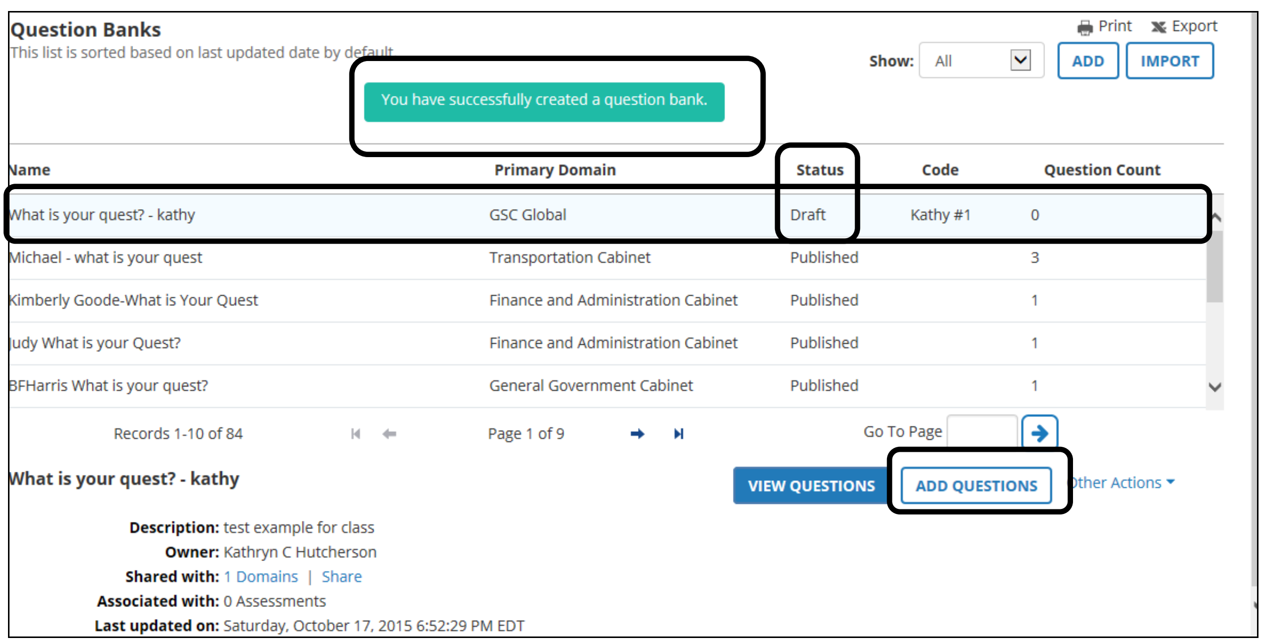


5. **Add a name, description and code** for the bank. **(Refer to your Student Card)**

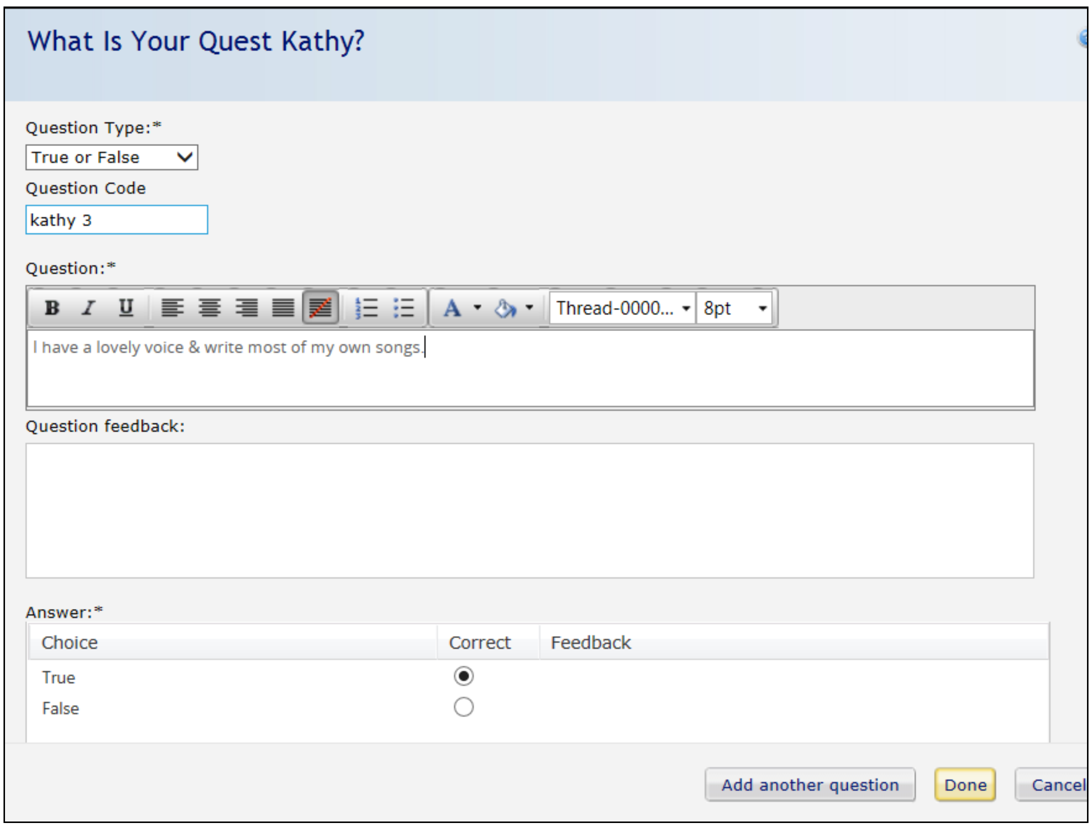



6. **Click Done**

Congratulations! You have successfully created a question bank.
IMPORTANT: Note that the bank is still in **DRAFT** mode.



7. Click the **Add Question** button in the bottom left hand corner.
8. **Choose your Question Type** (there are 5 types to choose from)
9. **Enter your Question Code** (name-#)
10. **Add your question**
11. **Add any Question feedback** (this will be displayed ), your answers with the correct answer marked and feedback that the Learners can see when you determine)
12. **Click Done**.

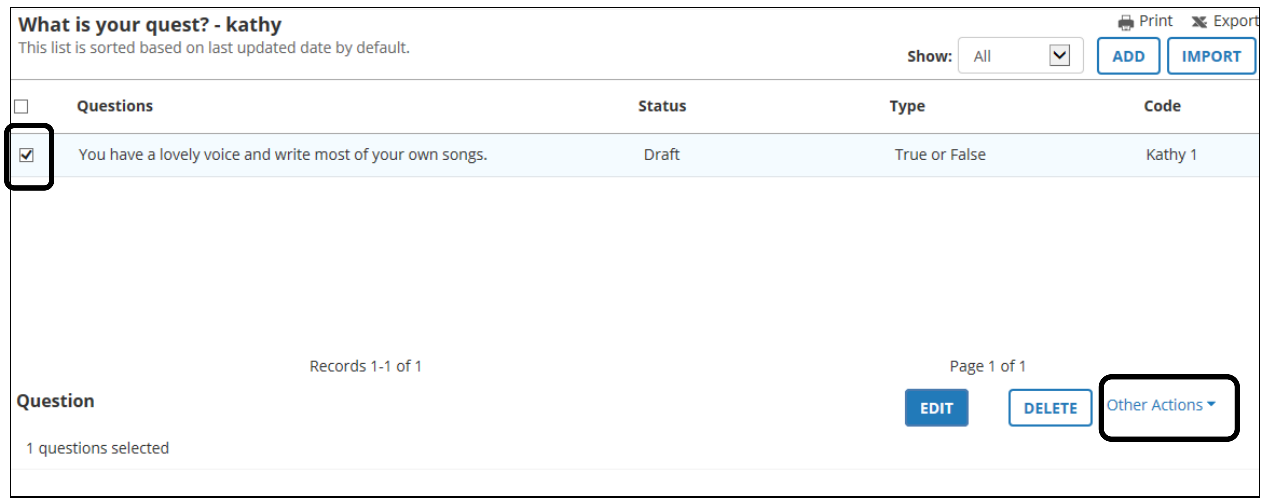


**Notice your questions are in DRAFT. You must publish the questions if you want them to appear in your question bank for use in Quick assessments.**

You may also choose to archive old questions, copy (and then modify) questions or take an already published question and change it back to draft for editing purposes.

13. Select the Question(s) you wish to Publish.

14. From Other Actions (bottom right hand corner), **Choose Publish.**
    Note that the status of the questions changes from Draft to Published.



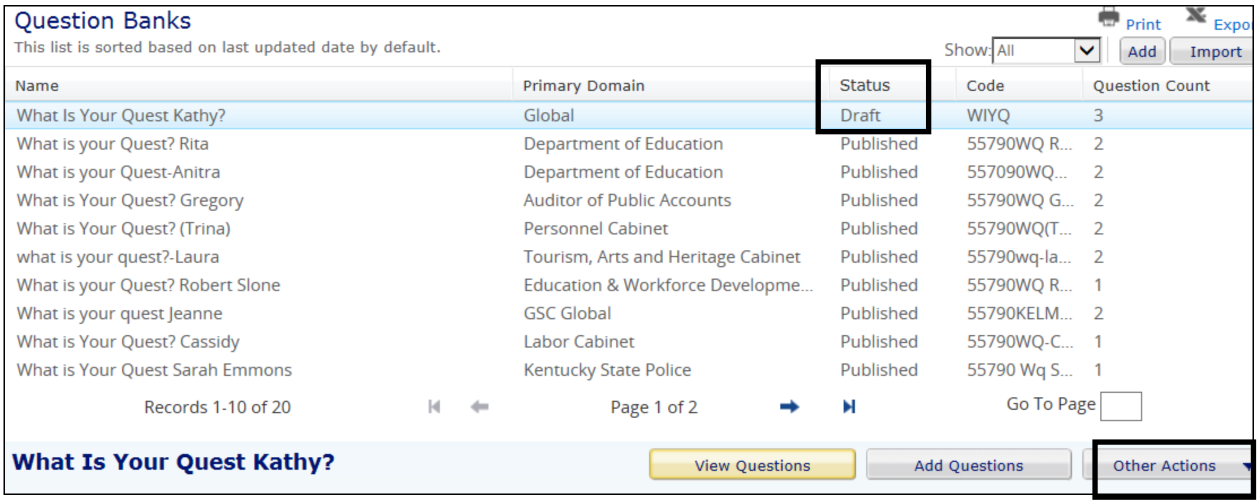

15. **Administrator>Learn>Question Bank.**

16. **Notice your question bank is also in DRAFT**. You must publish the question bank as well if you want them to be available for use in Quick assessments.

You may also choose to archive old question banks, copy (and then modify) question banks or take an already published question bank and change it back to draft for editing purposes.

17. Click to **Select the question bank**(s) you would like to Publish. (you may not see that the bank has been selected when you click on it but that's ok)

18. From **Other Actions**, **Choose Publish**
    Note that the status of the questions bank changes from Draft to Published.

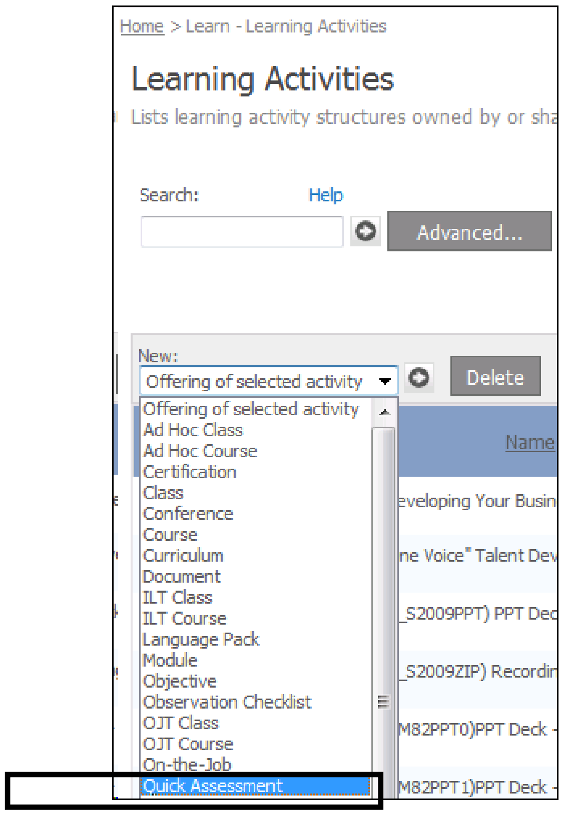



You have now created your Question Bank.
You have also created your questions and added them to the bank.
Both the bank and the questions have been published.

Our last step is to create the Assessment.

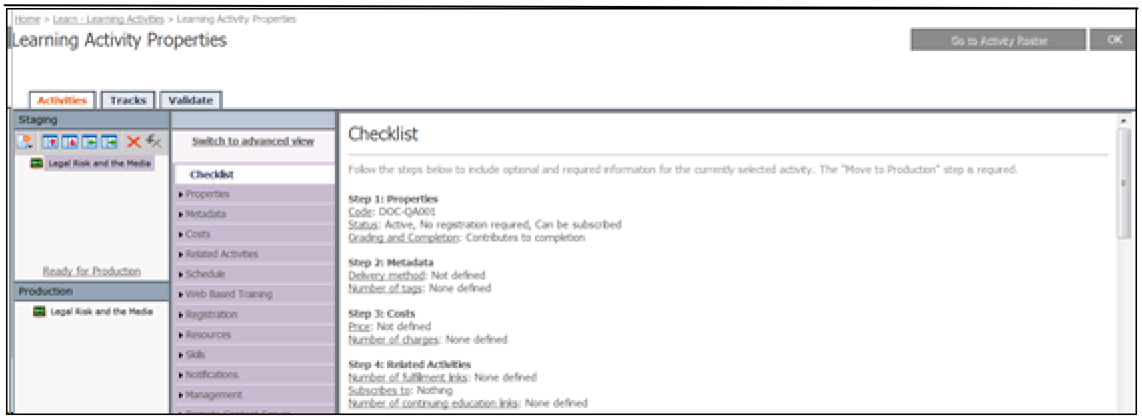
## Create your Quick Assessment

1. Hover over the **Administrator tab**
2. Hover over the **Learn menu**
3. Click on **Learning Activities**
4. **Choose Quick Assessment**.
5. In the New drop down **select Quick Assessment** & **Go**.

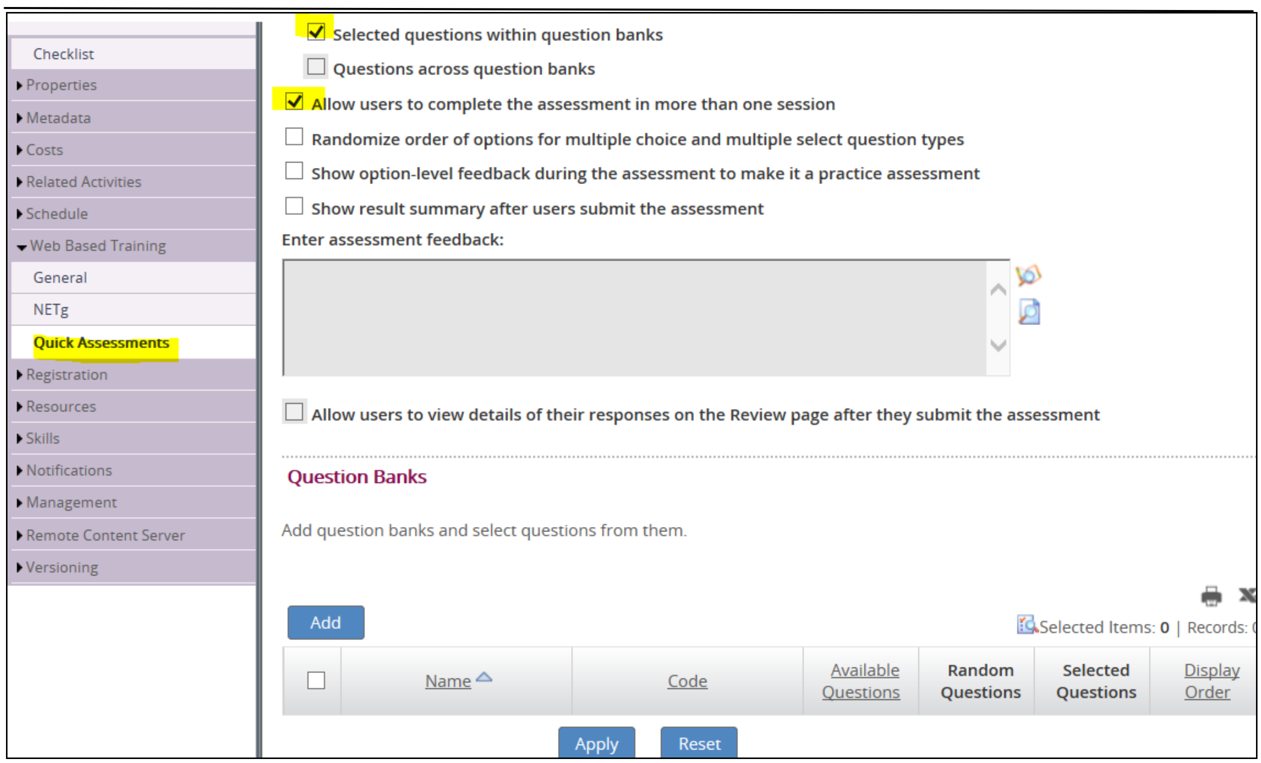



6. **Switch to Advanced View**

7. Click on **Properties**
8. Click on **General**
9. **Add activity name, activity code, description**
10. Click **Apply**




11. Go to **Web Based Training>Quick Assessment**
12. **Review the Options available** for your quick assessment.
13. **Click "SELECTED QUESTIONS WITHIN QUESTION BANKS"**



14. Scroll down and **Choose Add** to add the question bank or question banks from which you want to pull your questions. This is a multiple select option. **Click OK**

| ☐ | Name | Description | Code | Primary Domain | Owner | Questions |
|---|---|---|---|---|---|---|
| ☐ | Anti-Harassment | This corresponds to... | GSCANTI | GSC Global | Robert Glen Bo... | 2 |
| ☐ | What is Your Quest ... | | 55790 Wq Sarah Emm... | Kentucky State... | Sarah T Emmons | 1 |
| ☐ | What is your quest ... | KELMS TESTING | 55790KELMSCurtest | GSC Global | Jeanne Olivas | 2 |
| ☑ | What Is Your Quest ... | | WIYQ | Global | Kathy Hutchers... | 3 |
| ☐ | What is Your Quest?... | Testing document | 55790WQ Gregory | Auditor of Pub... | Gregory A Gies... | 2 |
| ☐ | What is your Quest?... | | 55790WQ - Latonia | Finance and Ad... | Latonia L Dool... | 1 |
| ☐ | What is your Quest?... | | 55790WQ Robert Slone | Education & Wo... | Robert K Slone | 1 |
| ☐ | What is Your Quest?... | Test | 55790WQblahblahblah | GSC Global | Glen Boles | 2 |
| ☐ | What is Your Quest?... | Test your Quest | 55790WQ(Trina) | Personnel Cabi... | Trina W Koontz | 2 |
| ☐ | What is Your Quest?... | | 55790WQ-Cassidy | Labor Cabinet | Cassidy Connell | 1 |

OK Cancel

15. **Enter how many questions you want to pull** from the question bank to deliver on the assessment in the Random Questions column.

16. **Choose the display order** for those questions. **Choose Apply.**

Question Banks

Add question banks and select questions from them.

Task: Add questions

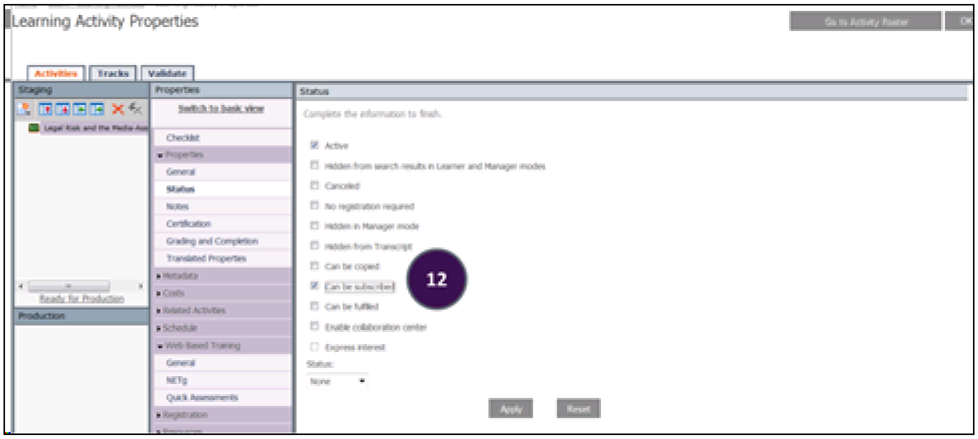
Add Delete

Selected Items: 1 | Records: 1

| ☐ | Name | Code | Available Questions | Random Questions | Selected Questions | Display Order |
|---|---|---|---|---|---|---|
| ☑ | What Is Your Quest ... | WIYQ | 3 | 3 | 0 | 1 |

Apply Reset

17. **Expand the Properties** menu and under **STATUS** make sure the **Can be Subscribed property is selected**. You will need to do this so that you can create the blended course in the next step.




**18. Move your Quick Assessment to production.**

# Curriculums

A Curriculum defines a learning path that identifies the required objectives and the order in which these objectives should be completed. You can use a Curriculum to:

- Organize different learning activities into a hierarchy to create an activity structure.
- Track variety of learning activities towards a single learning goal.
- Map a single record source for a variety of learning paths for a specific training subject. For example, a Learner can take an ILT course, an online course or an assessment to meet the completion criteria for a single subject.

When a curriculum is created, it makes a copy of the activities or offerings that make up the curriculum. When a Learner is registered to a curriculum, they register for this copy as well as the original roster of the activity itself. If a change is needed to the status of an activity in a curriculum, the Training Coordinator or Instructor would need to look at the roster of the actual standalone activity to make the choice.

When the activity in a curriculum is activated, the Learner uses this copied activity to manipulate the real activity, and the status of the real activity is passed back to the copy, which has the curriculum completion rules, etc, as properties that may need to be satisfied. By creating a copy of an activity for the curriculum, the system allows multiple curriculums to use the same activity for more than one structure.

This is why dual registrations appear for any activity that is in a curriculum structure and is not typically an error with the system.

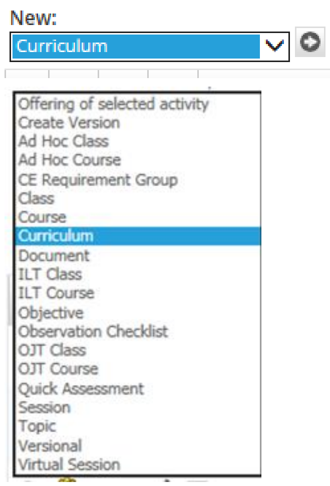
Before creating Curriculums, it's important to remember two things.

1. All activity courses must be previously created
2. Each activity course must be marked as "Can Be Subscribed to" in the Status Properties.

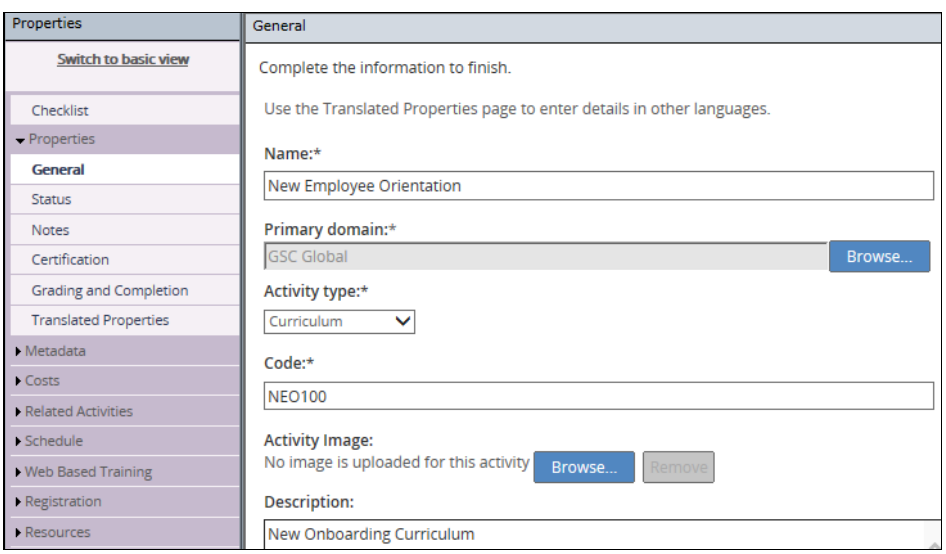
# Exercise 14 – Create a Curriculum

► **To Create a Curriculum:**

1. Go to **Administrator>Learn>Learning Activities**
2. **Select Curriculum**

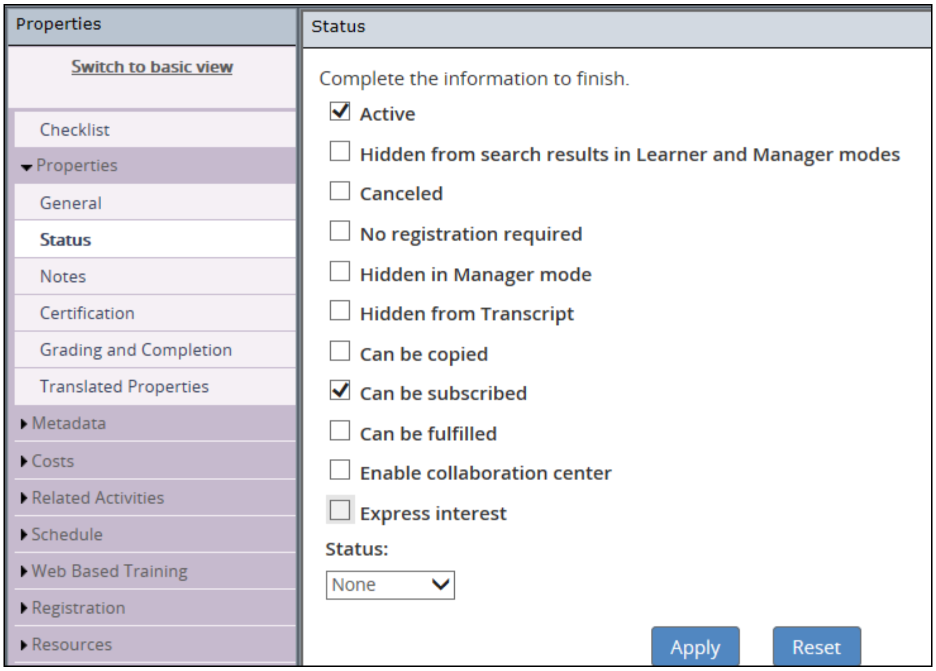



3. **Switch to Advanced View**
4. From **Properties>General**
   a. **Name the Activity** (Refer to your Student Card)
   **b. Add your Code** (Refer to your Student Card)
   c. **Add Description**
5. **Click Apply**

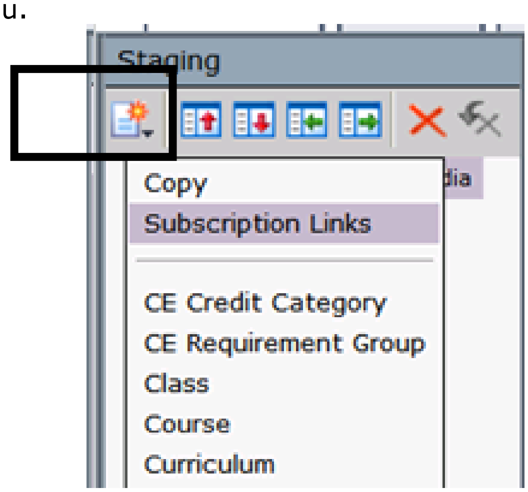


6. From **Properties>Status**
    a. **Select CAN BE SUBSCRIBED**

7. **Click Apply**




8. On the far left hand window panel, **Choose subscription links** from the staging menu.

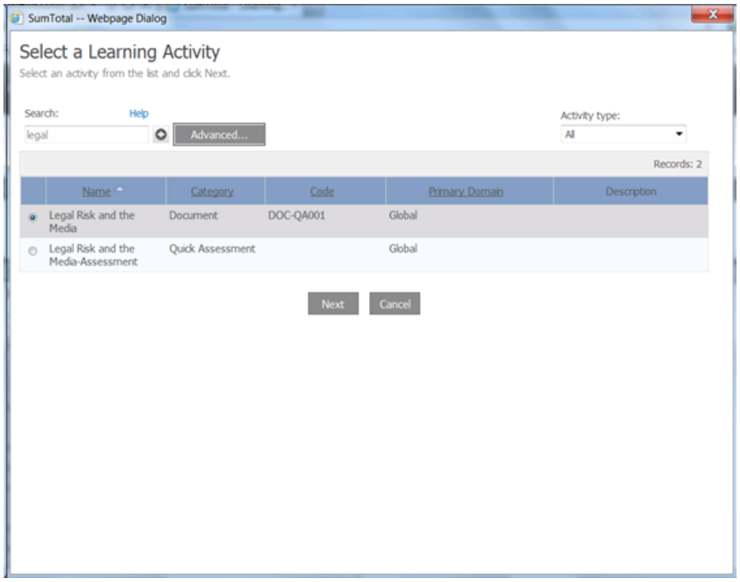



9. **Choose the activity you want to link to your curriculum**.

You can only choose one course at a time.

10. **Click Next.**

**Note:** If you did not select Can be subscribed previously, the activity you want to link will not appear in this list.

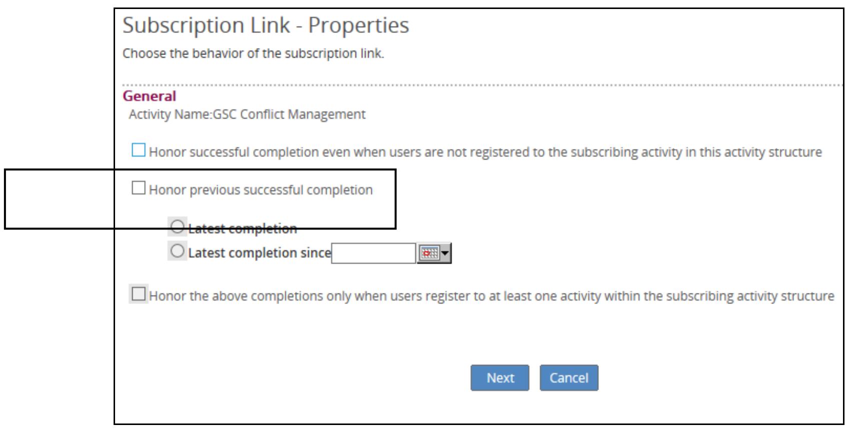



11. **Choose** the behavior of the subscription link. These options affect what happens if a Learner takes your activity by itself, or in another grouping of learning activities.
    - If you want your Learner to take the activity again, do not select any of these options. The roster will indicate that the Learner is registered even if they have previously completed the activity.
    - If you choose to Honor successful completion even when users are not registered to the subscribing activity in this activity structure.
        - Your Learner will not need to attend this activity because they have already completed the activity.
        - Your Learner will appear as completed on the roster for this activity in your new structure.
        - When registering, the Learner will see the warning sign that informs them they have already completed this activity. If they re-register, it will return them to the registered state, if they go through the registration process.
    - If you choose to **Honor previous successful completions,**
        - Latest Completion
        - The last successful completion will be applied toward the activity you are subscribing. Latest Completion Since You can determine the time frame in which to honor completions of this activity
    - If you choose Honor the above completions only when users register to at least one activity within the subscribing activity structure
        - If your Learner has completed all of the activities in your curriculum, they will be marked as complete, even if they do not register for the current activity you are creating.

- Your Learners will be able to register for only the activities they have not completed, but they must be registered for at least some part of your curriculum.
- Your Learner will appear as complete on the roster for the activity or activities they have completed.
- When registering, the Learner will see the warning sign that informs them that they have completed this activity. If they re-register, it will return them to the registered state, if they go through the registration process.
- If your Learner has completed all of the activities in your curriculum, they will be marked as complete.

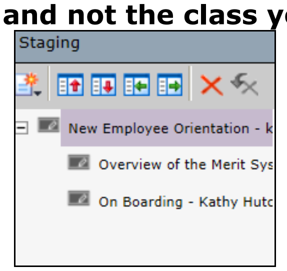
**NOTE:** Any activity that falls under the curriculum is a child.

Repeat Steps to add another course.




12. **Click Next**

**IMPORTANT: When adding another course to curriculum make sure you are on the curriculum and not the class you just added.**




13. **Add any other options** that you would like.

**Note:** Because the activities in our curriculum are subscribed, you cannot edit the properties from the curriculum. You must set any options at the activity level.

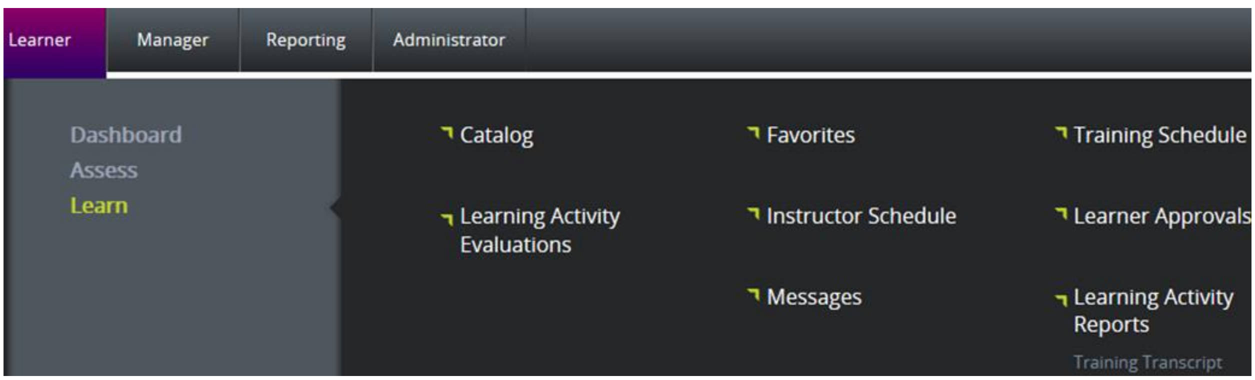
14. When completed, **move the curriculum to Production**.

# Instructor Schedule

## Exercise 15 – Viewing Your Instructor Schedule

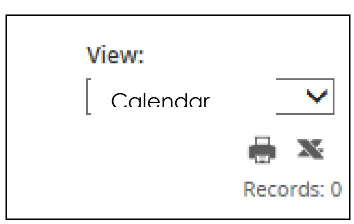
► **To view your instructor schedule:**

1. From the **Learner>Learn>Instructor Schedule**.




2. Select one of the following from the **View** list on the far right hand side of the page:
   - **Current activities** - shows the current activities you are scheduled to teach.
   - **Previous activities** - displays activities taught in the past.
   - **Pending requests** - lists the activities you are requested to teach. Approval for this request is still pending.
   - **Calendar** - displays the instructor schedule in an interactive calendar view.
   - **Upcoming activities** - shows future activities.

**2. Choose Calendar**



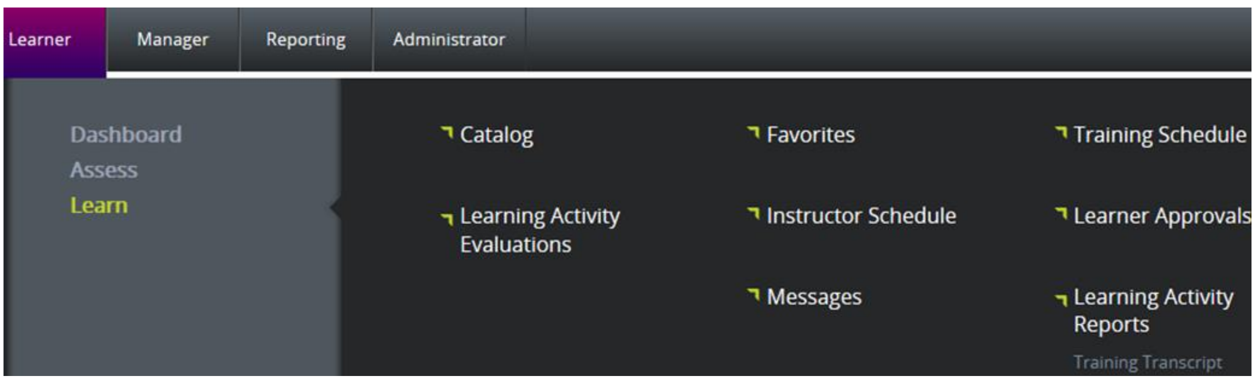
# Marking Completions

In addition to marking attendance you can also set the completion status for a user's participation to Yes or No. You can also view each participant's completion date, score, and attendance status.

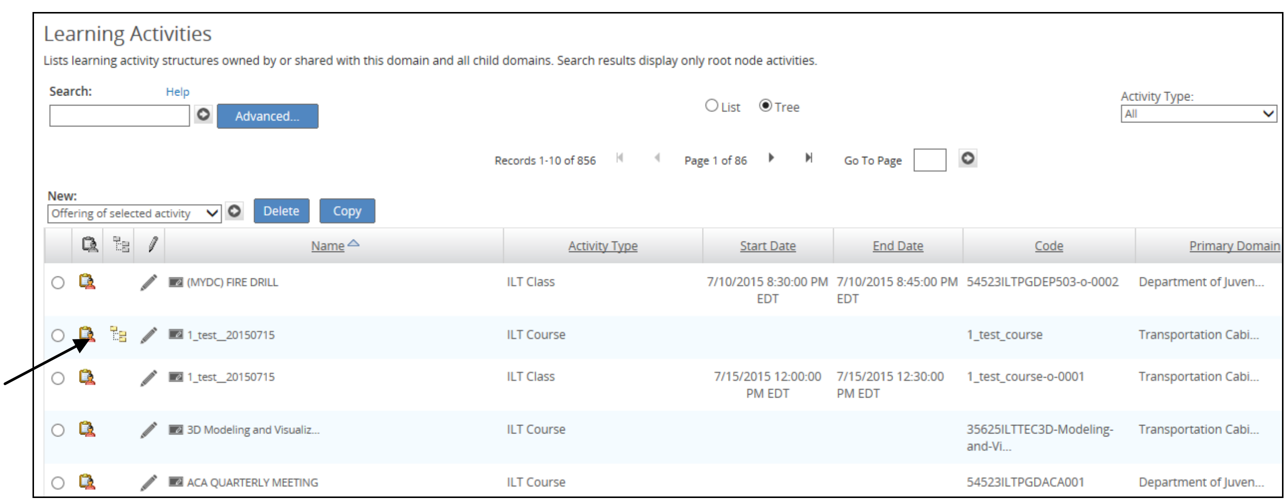
## Exercise 16 – Marking Completions in Your Domain

► **To enter a user's completion status for a learning activity:**

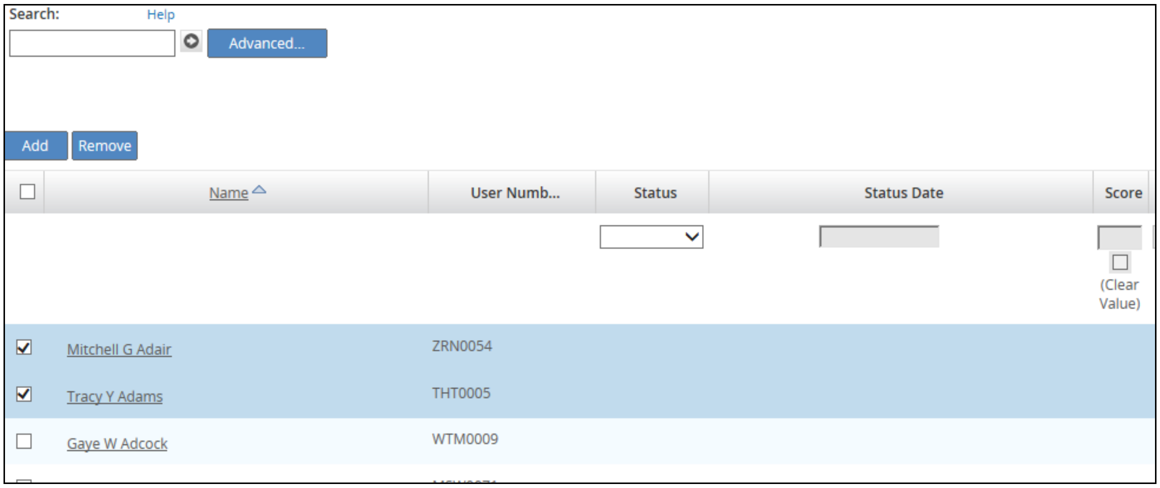
1. **From Administrator**, Select **Learn>Learning Activities**.



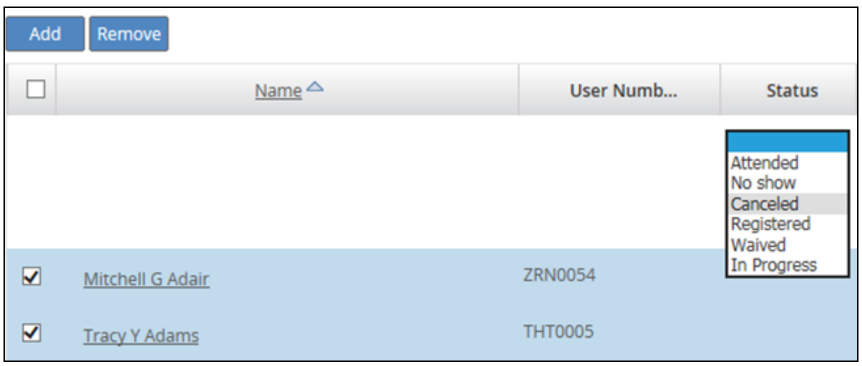

2. **Locate the activity and click the Manage Roster icon.**



**3. Locate your name in the roster and check the box beside it.**

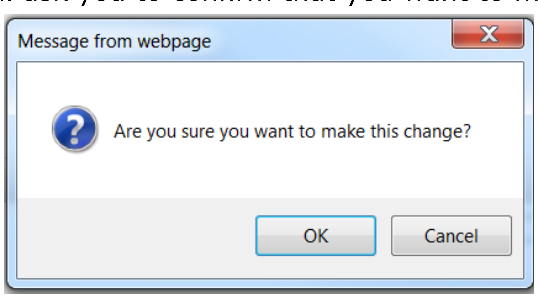



4. **Go to Status** and change status to **Attended.**




**5. Click Apply** at the bottom of the screen.

6. KELMS will ask you to confirm that you want to make this change. **Click OK**




7. From the **View** list, **select Completion Information**.
6. Click **Apply**.

***Note:*** *You can mark a user as Completed but has not passed the training activity. This means that the Learner had unsuccessfully completed an activity.*

# Roster Reports

## Exercise 17 – Generating Roster Reports For Your Domain

You can generate the following reports from the Activity Roster page:

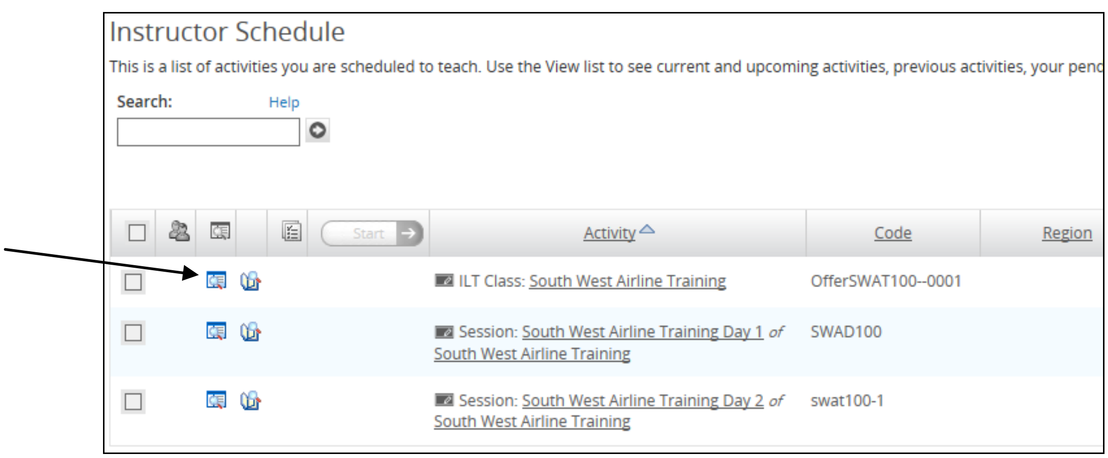
- Activity Completion Report
- Activity Evaluation Report: An evaluation report shows the responses that people have entered for a specific learning activity.

### ► To Generate Roster Reports:

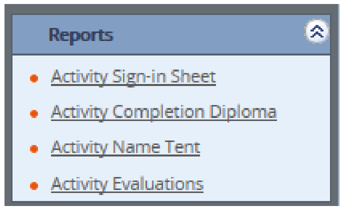
**1.** From **Administrator** Select **Learn>Learning Activities**.


The Learning Activities page opens.

**2. Locate** the activity and **click the Manage Roster** icon and the Activity Roster opens.



**3.** On the sidebar, under reports, **select the report you want to generate**.




Here you can view the Activity Sign in Sheet, Diploma, Name tents and Evaluations.

**4.** For Class purposes today, select Activity Completion Diploma.

# Managing Audiences

Audiences control user access to learning activities in Learner and Manager Modes. Every learning activity offered in KELMS is designed for a target group of users. The target group for any learning activity can be every employee of a agency, members of a agency division, employees working for a common job, newly hired employees, promoted employees, or a specific list of employees in an agency.

You can assign learning activities directly to an audience. You can also assign learning activities to a target group of users based on the language settings for users, such as French or Japanese.

In KELMS, an audience is defined using a set of filtering rules that are used to control various aspects of learning activities.

Every learning activity in KELMS must have at least one associated audience to determine the Learners who can access it; otherwise, the activity is not visible to any Learner. By defining audiences and associating them with a learning activity, you can control the Learners who can:

- View the learning activity in the training catalog
- Register for the learning activity
- Occupy a seat on the learning activity roster
- View reports

Audiences can also be used to assign learning activities to users. Just as you can assign required or recommended training by organizations, jobs, and individual users, you can also assign required or recommended training by audiences.

**Audiences are defined using rule sets**. **Rule sets are groups of rules that determine the members of an audience.** This rule-based architecture allows you to define sets of users based upon different parameters such as their job, organization, Manager, managed users, and more.

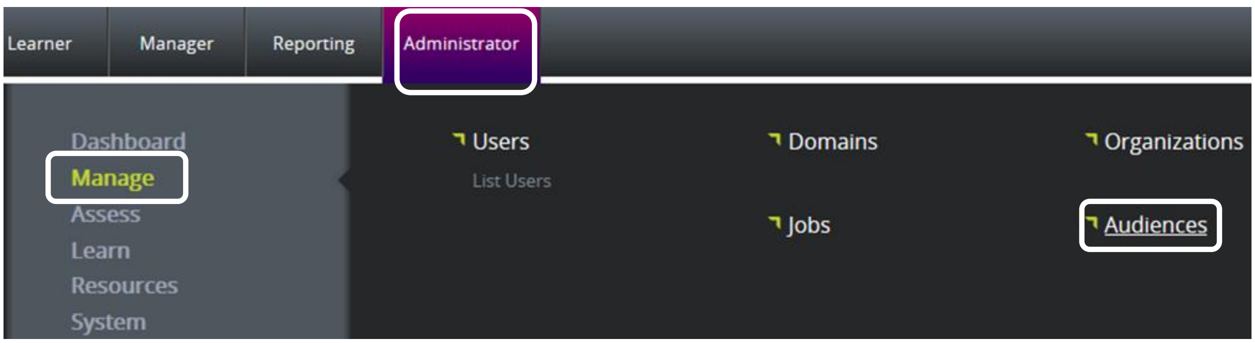
Every audience consists of at least one rule set. When multiple rule sets are added to an audience, users must meet the requirements of any one rule set to qualify as a member of the audience.

## Creating an Audience

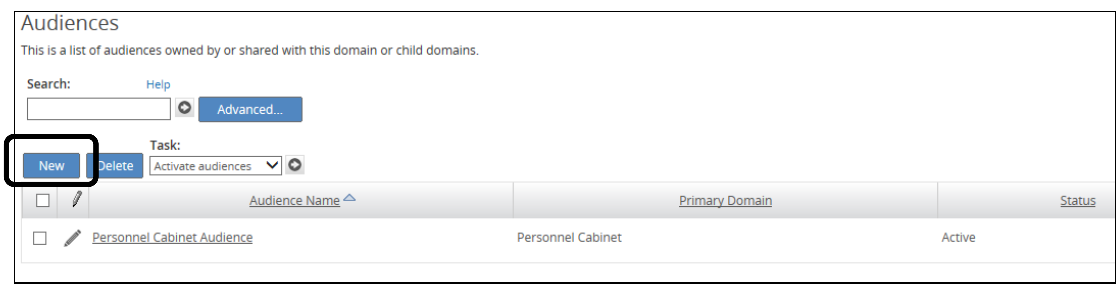
### Exercise 18 – Creating An Audience

***Audiences are powerful tools.***

1. Hover the mouse over the  **Administrator** tab
2. Hover the mouse over the **Manage** menu
3. Click on **Audiences**

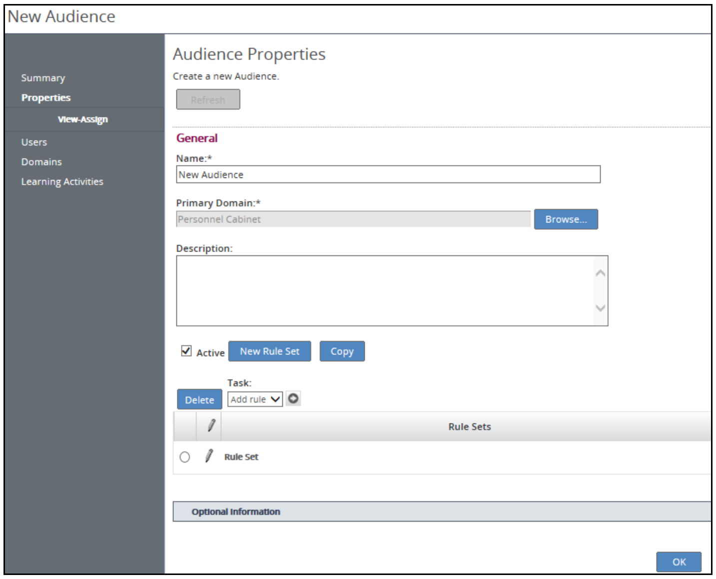


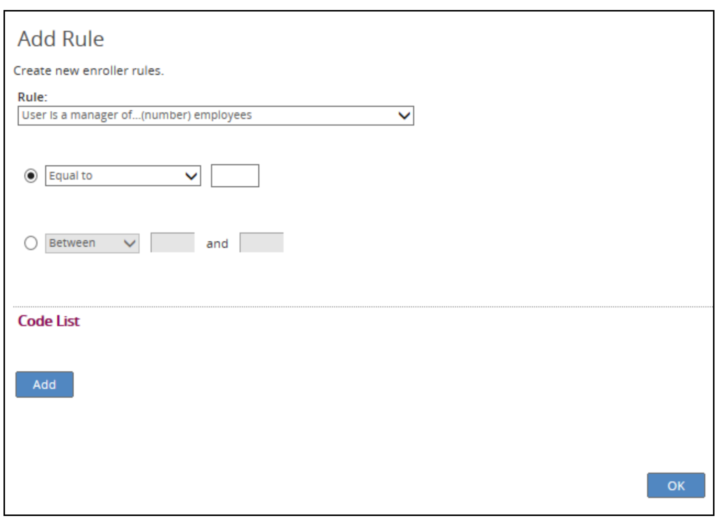

4. **Click** on the New Button.



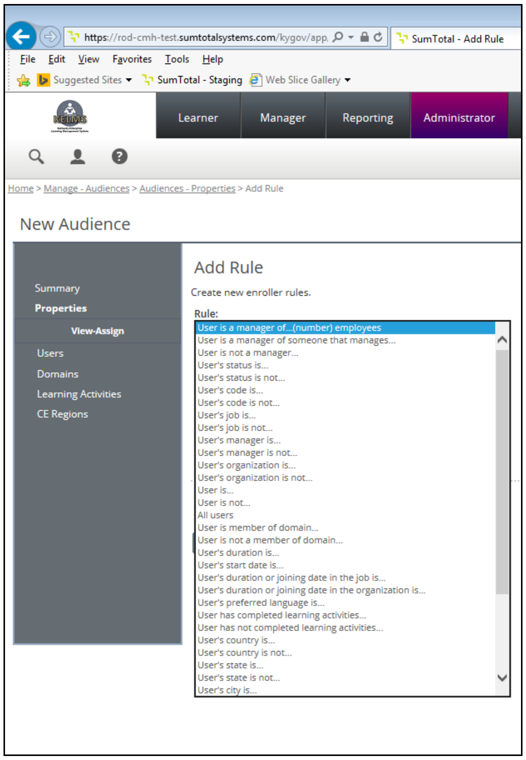

5. **Name your audience**, and give it a good description.

6. **Click** on the radio button next to "Rule Set," and then **click** on the  button next to the "Add Rule" Drop down.

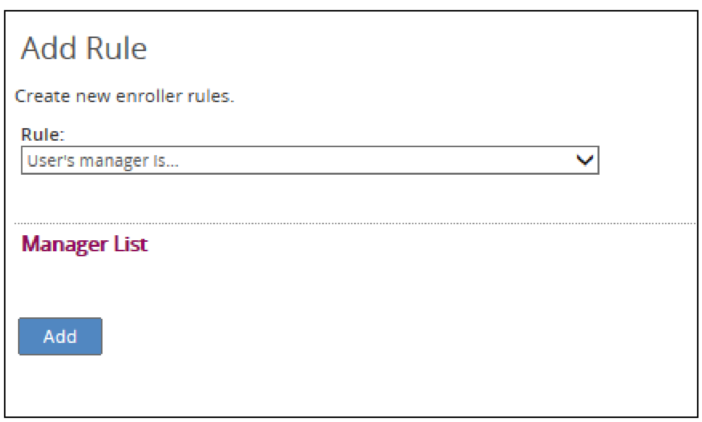


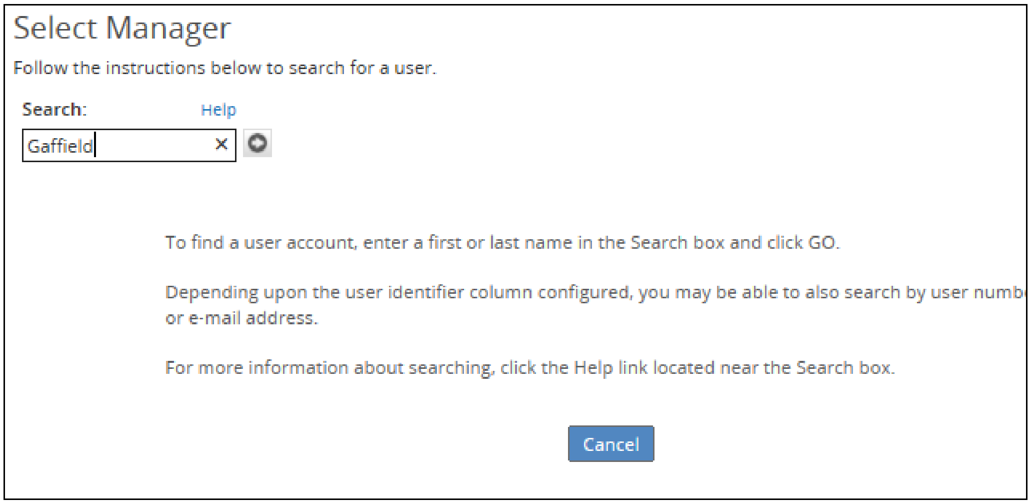

7. You have many options here. You can create audiences based on jobs, how many employees a person manages, when they started, if they have or have not had specific training, etc.



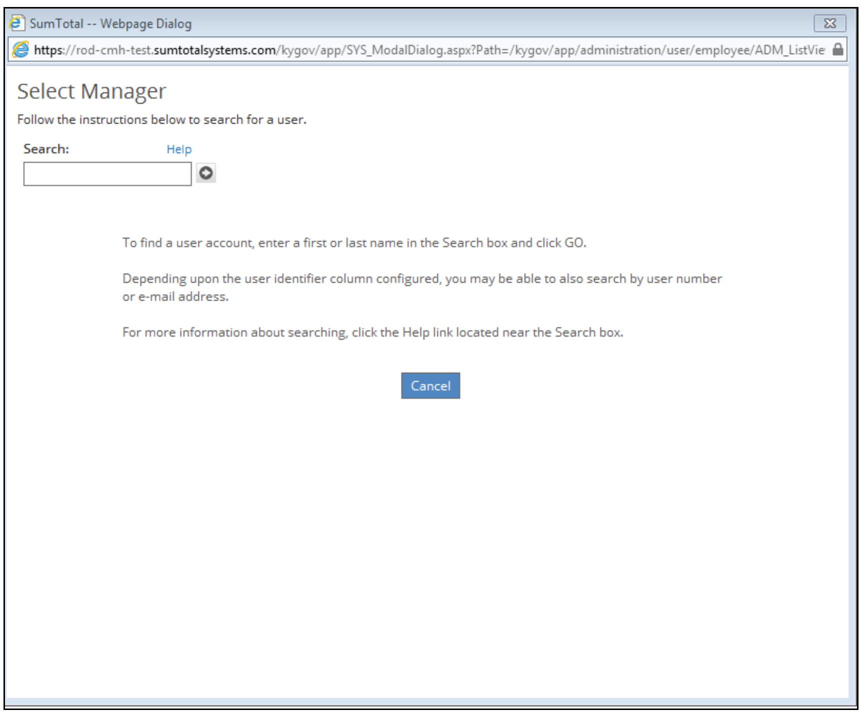
**8.** Each Rule you pick will give you different options to choose from below it.  In this example, **Select "User's Manager Is"**



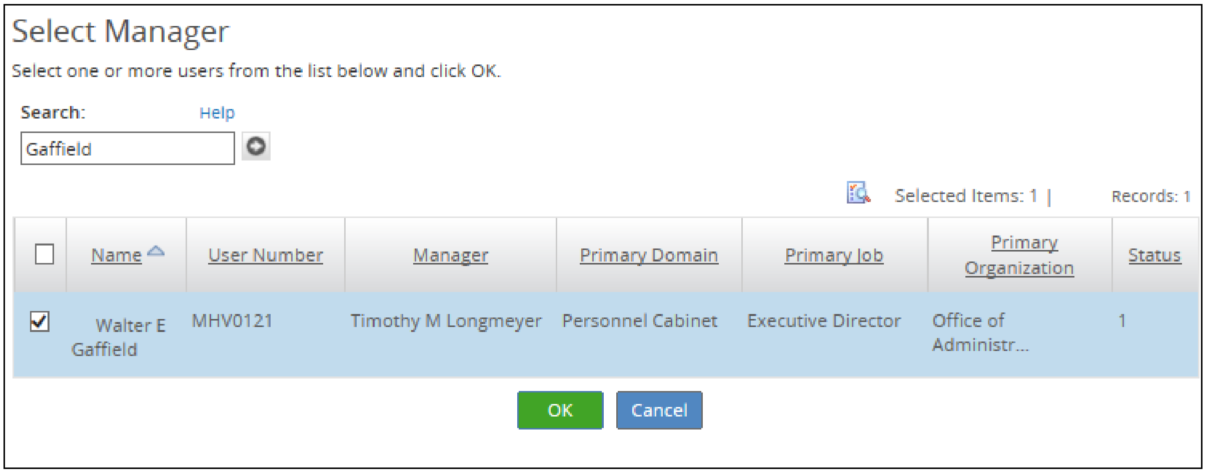

9. **Click** the "Add" button.

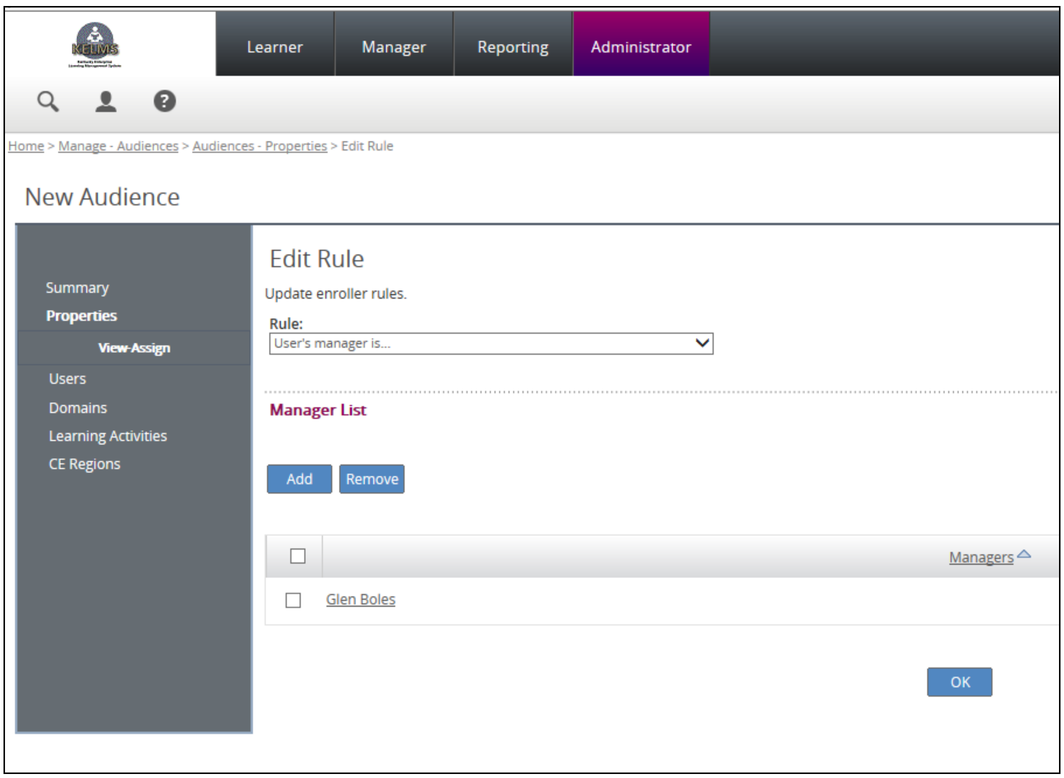



10. **Search for the Manager** you are looking for then press the button.



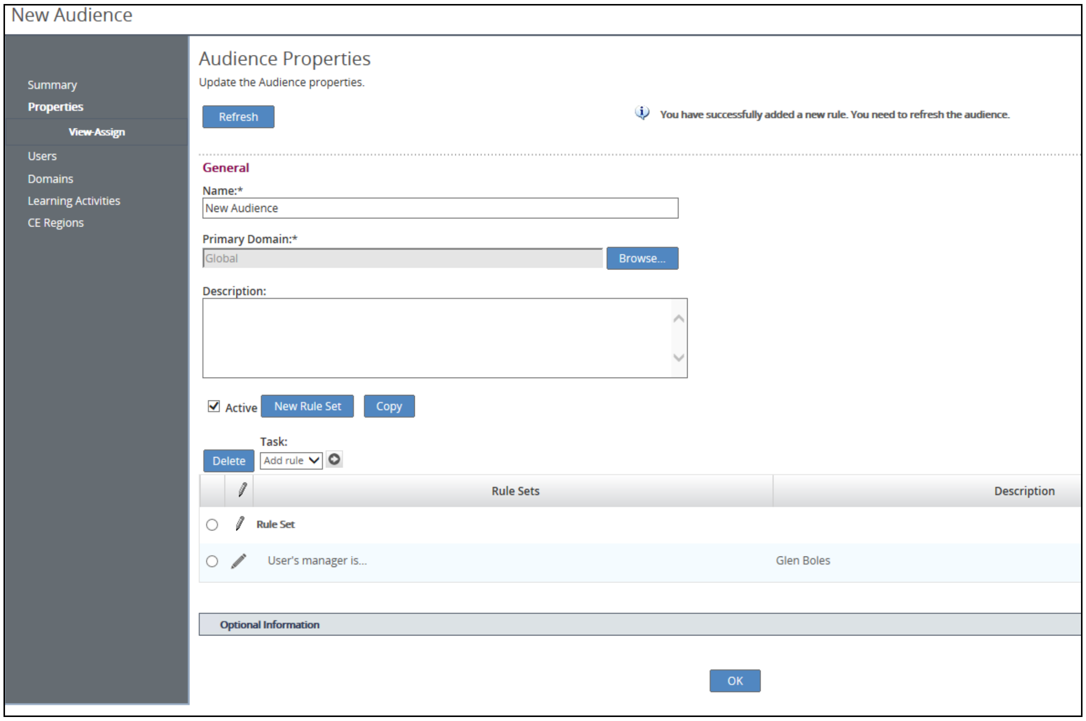

11. Their name should appear. You can select multiple Managers by clicking on the "Add" button again. When you are done selecting your Managers, **click "OK**."



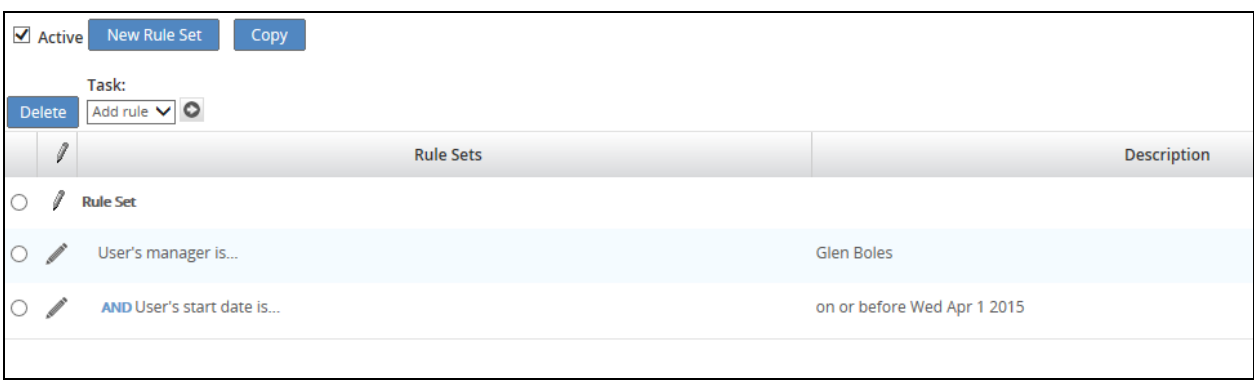




12. You can now see your rule set contains, anyone who has a Manager named…

13. **Click OK.** You can now assign trainings to this audience.




14. You can make rules very complex. I could add a rule to the rule set to limit the audience to anyone who is managed by…. And who has a start date before a certain date. **In this example if I assign this audience to my class, it will assign anyone who is managed by Glen Boles and started their job before April 1, 2015.**




**Good Idea:** Add an audience to your onboarding training. This could automatically assign new employee's specific training they need to start their new position. You could create a rule that says anyone that has "Duration" of less than 10 days needs to be assigned training. When the import comes in, anyone that has a start date of less than 10 days prior will automatically be assigned that training.

# Assigning Training

With appropriate permissions, you can assign training to selected users, an organization, a job, or an audience. Users must be a member of the audience associated with the learning activity in order to see the assignment in the Learner to do list. It is visible to anyone in a Learner search or if associated with a category. You can specify if these trainings are required or recommended.

- **Required training**: Learners must register and complete this mandatory training.
- **Recommended training**: Learners are free to choose whether they want to register and complete recommended training. This training is not mandatory.

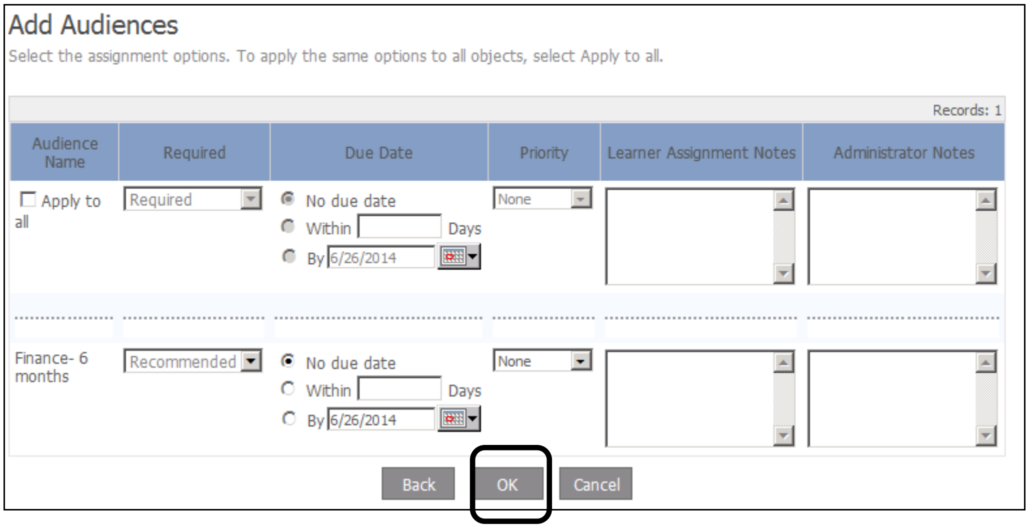
*Note: Required and recommended training are referred to as assigned training.*

## Exercise 19 – Assigning Training to an Audience

► **To assign a learning activity to an audience:**

1. Hover the mouse over the **Administrator** tab
2. Hover the mouse over the **Learn** menu
3. Click on **Learning Activities**
4. Click **Edit (pencil)** next to the name of the learning activity you want to view. (Refer to your student card)
5. If the activity is not available in the Staging area, click the **Bring to Staging** link.
6. In the middle column, click **Management**, and then click **Audiences**.


7. Click **Add**
8. **Select the audience** you want to assign the learning activity.
9. Click **Next**




9. Choose whether the assignment is "**Required"** or "**Recommended"**.
10. Set the **Due Date** and other options.
11. Click **OK**.

**IMPORTANT:** Make sure you include a rule that says: "User is in domain…" and select your domain.

Audience rule sets can cross domains.

# Helping Your Manager

## On-The Job Training

With appropriate permissions, you can use On-the-job training (OJT) to observe and track a user's proficiency in a specific training required for the job. You can manage OJT Courses and OJT Classes that you create.

**For OJT Courses:**

- You can register users and manage the roster from the **Manager Exception Report** and from **Search** results.

- You can register users from the **Detailed Exception Report by User** if the direct report is not registered. Else, you can manage the roster from the **Other Actions** link.

**For OJT Courses and Classes:**

- You can manage OJT Classes, register users, edit OJT Class assignments, and manage the roster from the **Manager Exception Report** (from the **Activities** tab) and from **Search** results by clicking on the **Other Actions** button.

- You can register users from the **Detailed Exception Report by User** if the direct report is not registered. Else, you can manage OJT Classes from the **Other Actions** button.

## Creating an OJT Class

As a Manager, with appropriate permissions, you can create an OJT Class, edit and delete an OJT Class and manage the roster of an OJT Class that you own. The audience for the OJT Class you create will default to the OJT Course audience.

### Create An OJT Class

► **To create an OJT class:**

1. Search and locate the desired OJT Course.
2. **Click Manage OJT Classes**.
3. **Click Create OJT Class** on the **Manage OJT Classes** page.
4. **Click Create and Add Users** to create the offering.
5. **Select** all the desired user names from the panel on the left.
6. **Click** 

to move users to the registration list on the right panel.
7. **Click OK**, and then **Done**.

## Proxies

Managerial functions for a group of users may suffer delays if Managers are unavailable. In such scenarios, it is important to ensure the employee training is not adversely affected. To do this, you can delegate all the training task management for the team to another user, or a member of the team. KELMS offers the Proxy Relationship features for you to designate another user to act on his behalf for a limited period of time or indefinitely.

You should have appropriate permissions to be able to assign a proxy relationship.

### Assign a Proxy Relationship

► To assign a proxy relationship:

1. From the **Manage** menu, click **Proxy Relationships**.
2. Click **Add**.
3. Click **Browse** on the **Proxy Relationship** page.
4. Select the radio button next to the desired user and click **OK**.
5. Select **Activate Proxy between** in the **Activate proxy relationship** section, and enter the necessary details.
6. Click **OK**.

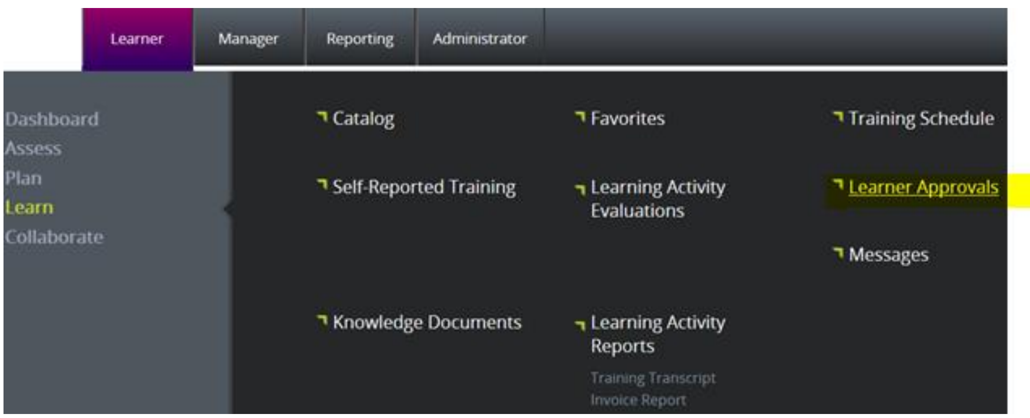
## Approvals

Sometimes, your direct reports need your approval to register for a learning activity. You can view a list of the approval records for learning activities that any selected user has registered to take.

## Approve Training Requests

► To approve training requests:

1. From the **Learn** menu, click **Learner Approvals**.

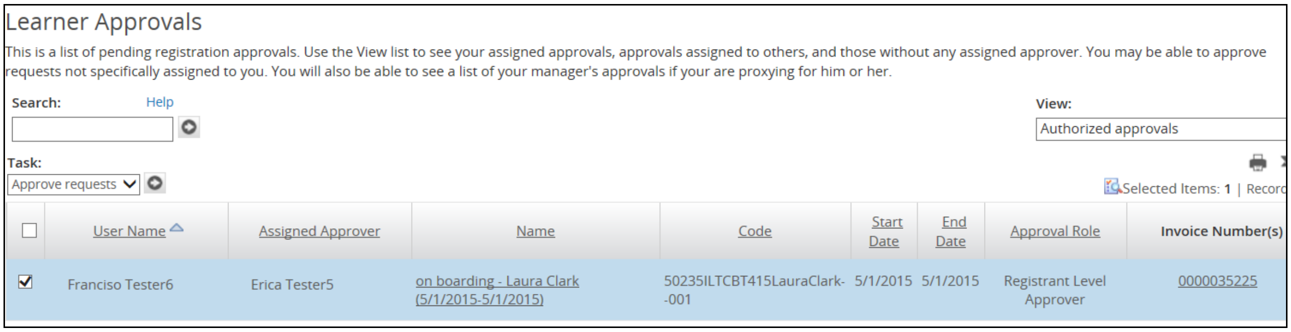



2. **Select** the appropriate approval view (**Authorized Approvals**) from the **View** list on the right hand side of the screen.


This will allow you the opportunity to see your assigned approvals, approvals assigned to others, and those without any assigned approver. You may be able to approve requests not specifically assigned to you. You will also be able to see a list of your Manager's approvals if you are proxying for him or her.

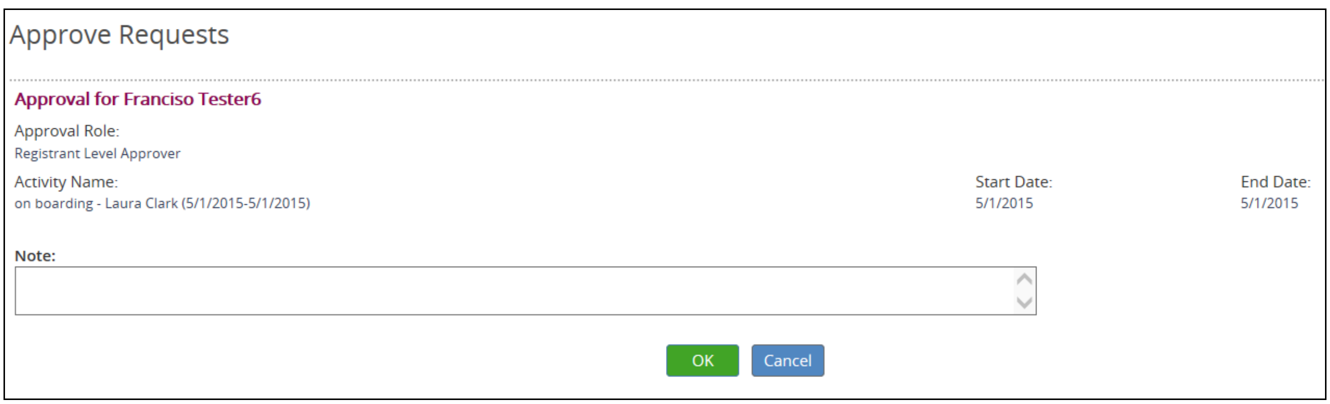
The screen will return a list of pending registration approvals.

3. **Select the check box** beside the request you want to approve.
4. In the Task list, select **Approve Requests**.
5. Click .




6. [Optional] Enter any notes regarding the approval.

7. **Click OK** to accept the request.



# Reference - Links Between Learning Activities

Once you have built all your activities, you can connect them using activity links. There are, four types of links:

- **Subscription links:** Commonly used for content or learning objects reuse in multiple activities.
- **Fulfillment links:** Commonly used to provide alternate activities that count toward the same requirement. These links can also be used to update an old class to a newer version, though there are other better ways of doing this.
- **Prerequisite associations:** Commonly used to require or suggest pre-work for an activity. Though these can also be used to order a set of activities.
- **Offered-by links:** Commonly used to link ILT Classes to the ILT course that will organize all of the ILT classes that you offer.

Each link has unique features that will allow you to maximize the use of your activities by associating them to one another. You will need to decide on your priorities before using these links, because, as a rule you should use only one type of link in any structure. Consistently following the one type of link approach has 2 major benefits. First, it will create the most stable activity structures. Second, and most importantly, it will create the easiest structures to navigate for your users.

## Best Practices Summary

- Online activities cannot be copied in KELMS. Instead of duplicating online activities for use in multiple programs, use subscription links to point to an online activity from other activity structures. This ensures that the activity is reused rather than copied, and only a single copy of the activity needs to be maintained.

- Try to use only one type of link in large activity structures. This keeps registration flows predictable for Learners and Managers.

- It is a good practice to not use both a fulfillment link and a subscription link between two learning activities. Doing this has a negative impact on reporting and the system will not allow intentional use of different links between the same activities.

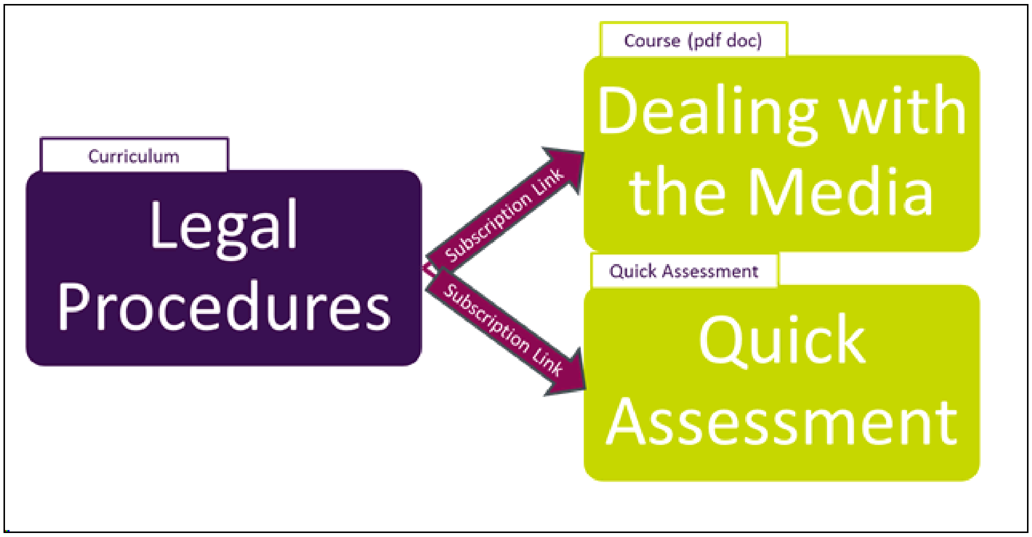
- Avoid common activities in different small structures which are to be nested into a larger single structure. This creates circular logic which will prevent proper roll-up and completion of the structure.

- To enable the greatest possible reuse of structures, separate the activity structures that organize training from the activity structures that provide training.

- Limit structures to no more than 20 subscribed activities and individual activities to no more than 150 fulfillment relationships.

## Subscription Links

The main feature of the subscription link is training re-use. These links allow you to create activities as common learning objects, chunks of training that can be delivered in multiple activity structures. They are also invaluable when using content. To link content, like SCORM courses or documents to a larger training structure, subscription links are best.



Subscription links allow you to pull activities together into a larger learning activity structure, usually a Curriculum serves as the organizer for your training.

One of the most frequent uses for a subscription link is to upload content and link it to multiple curriculums. The primary purpose of this type of link is for reuse. Subscription links enable you to reduce the number of new activities in your system and maximize the usage of existing activities. This connection eliminates the need for Training Coordinators to continually upload content every time a training program is offered. It also ensures that if a course is updated, it has to be performed only once because the other learning activities simply point to this online course. Subscription links make it very easy to reuse content in multiple activity structures.

Learners register for the curriculum, choosing the activities they are required or desire to complete. You will be able to set properties to control the way Learners register for their training. An additional consideration for the subscription is the option to honor successful completions of the subscribed activity. Options for this are discussed below.

Other examples where subscription links are useful:

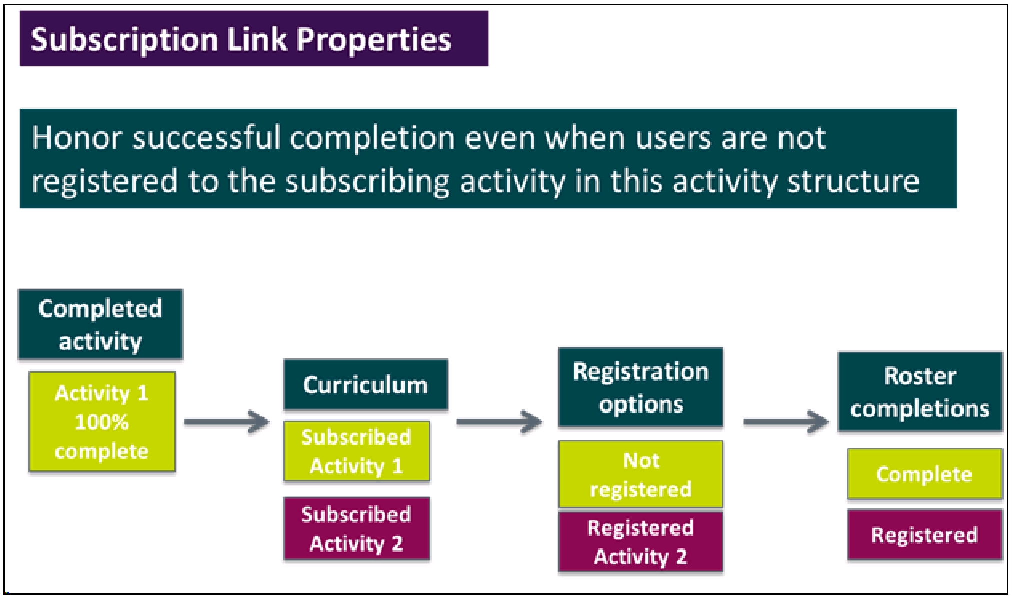
- Certifications- if you create a curricula and give it certification properties, you can subscribe your content, making yearly updates a breeze!
- Subscription links of any type make registration for the end-user easy and intuitive.

### *Considerations for Subscription Link Behavior:*

These options affect what happens if a Learner takes the subscribed activity by itself, or in another grouping of learning activities.

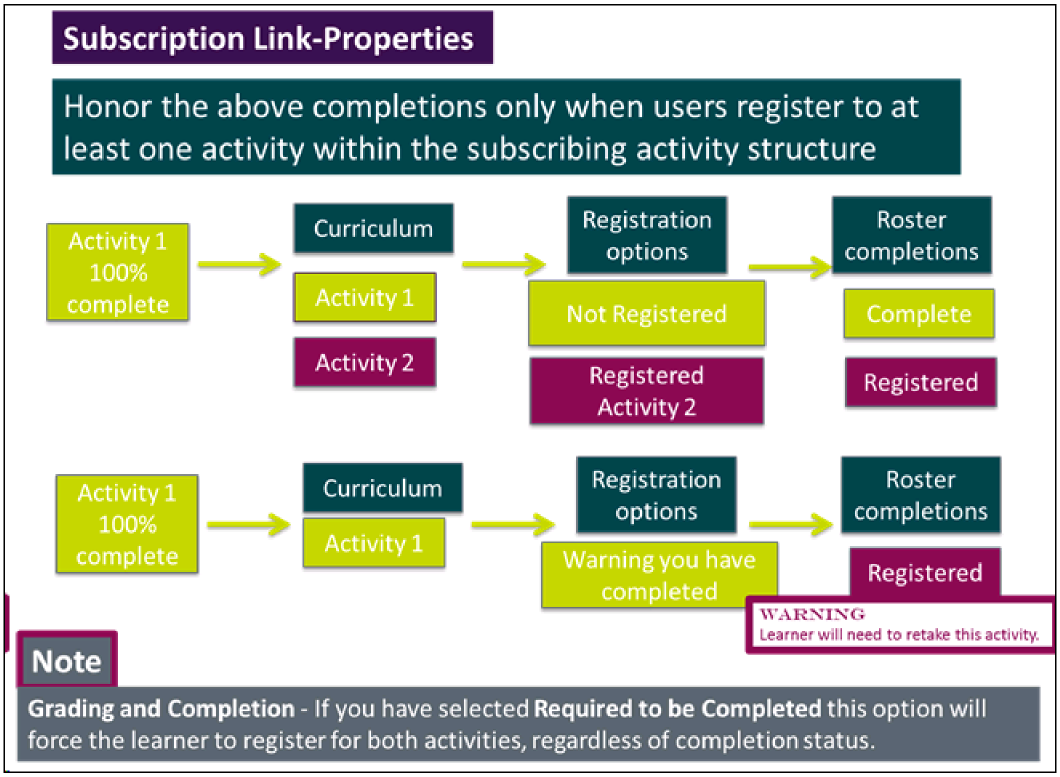
- If you do not select any of these options, your Learner will need to take the activity again. The roster will indicate registered even if it has previously been complete.
- If you choose to Honor successful completion even when users are not registered to the subscribing activity in this activity structure.
- Your Learner will not need to attend this activity because they have already completed the activity.
- They will see the warning sign that informs them they have already completed this activity.

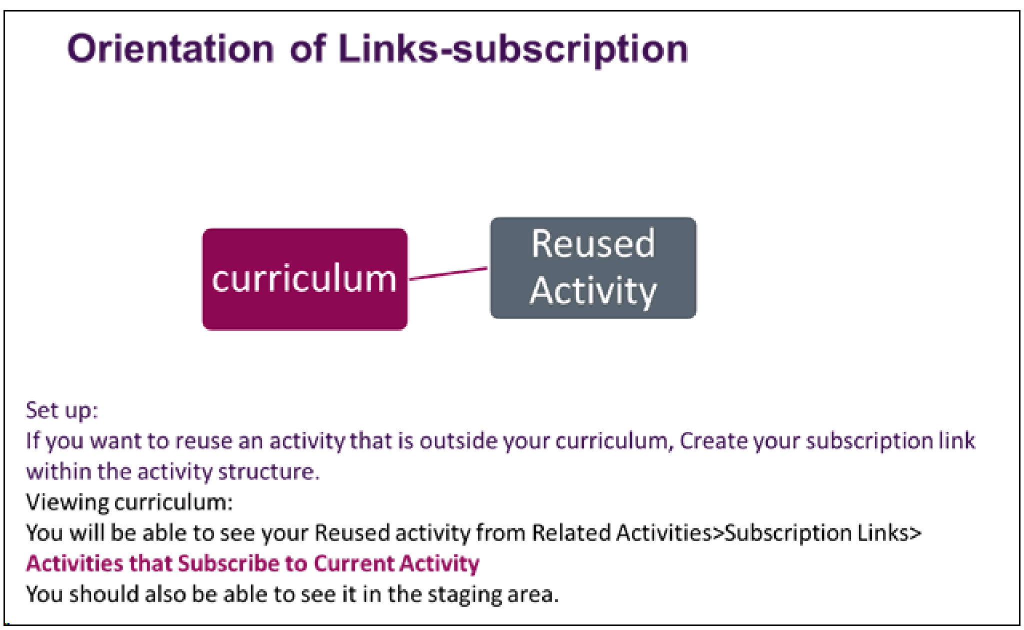
- Your Learner will appear as completed on the roster for this activity in your new structure.

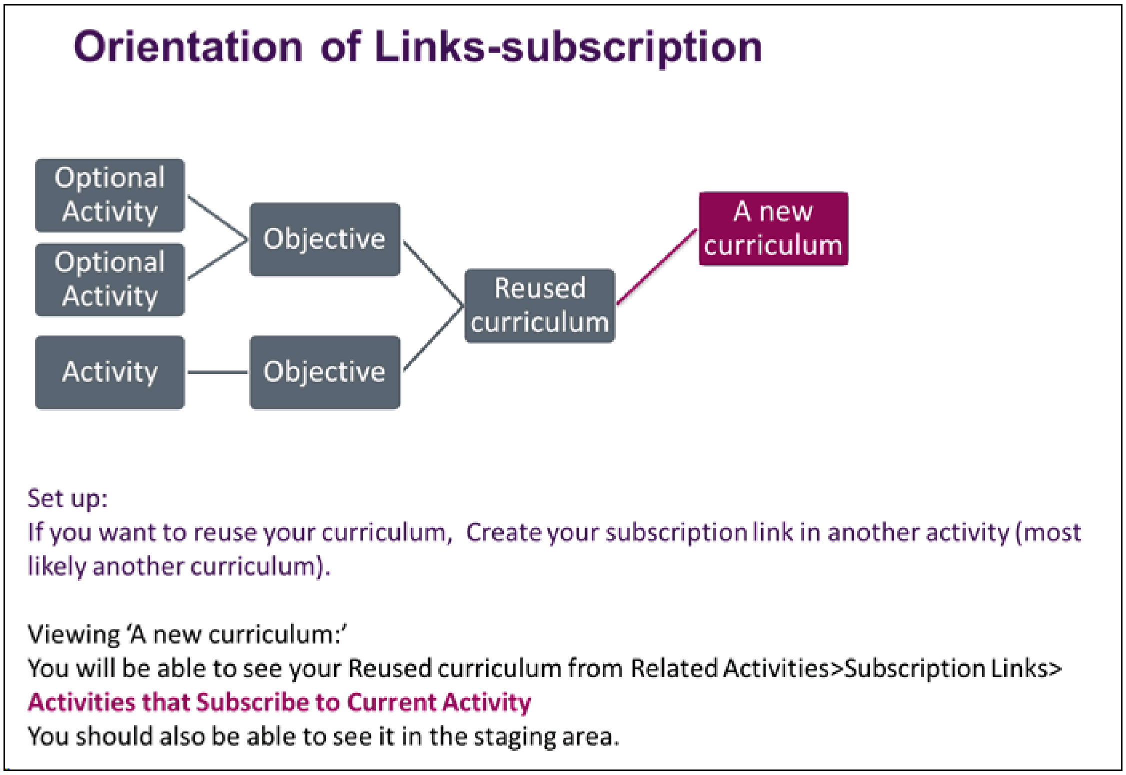



- If you choose to Honor previous successful completions,
- Latest Completion
  - The last successful completion will be applied toward the activity you are subscribing.
- Latest Completion Since
  - You can determine which completion to honor

- If you choose Honor the above completions only when users register to at least one activity within the subscribing activity structure



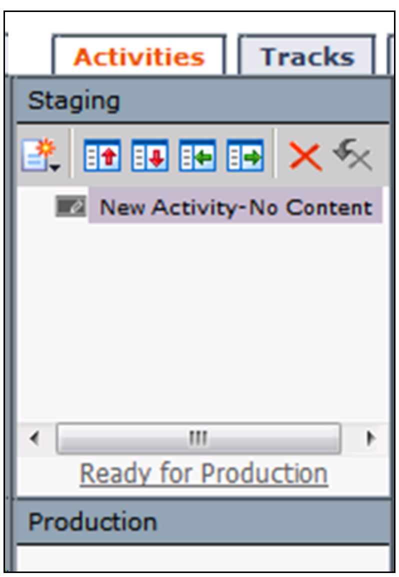






### *How do you create a Subscription Link?*

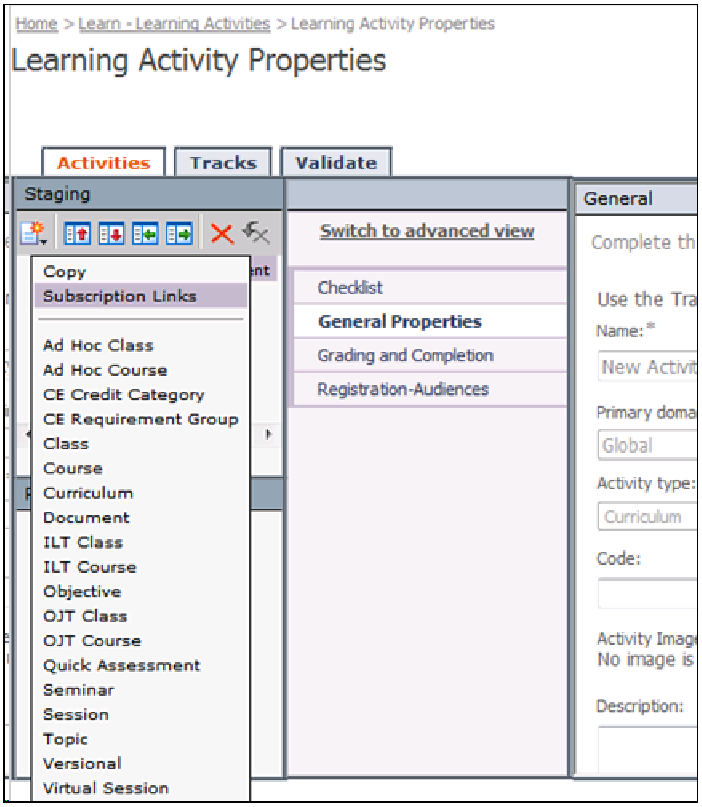
- Step 1.

You will need to create an activity as a shell to hold your subscribed activities, a curriculum, objective or topic is usually a good choice for this.



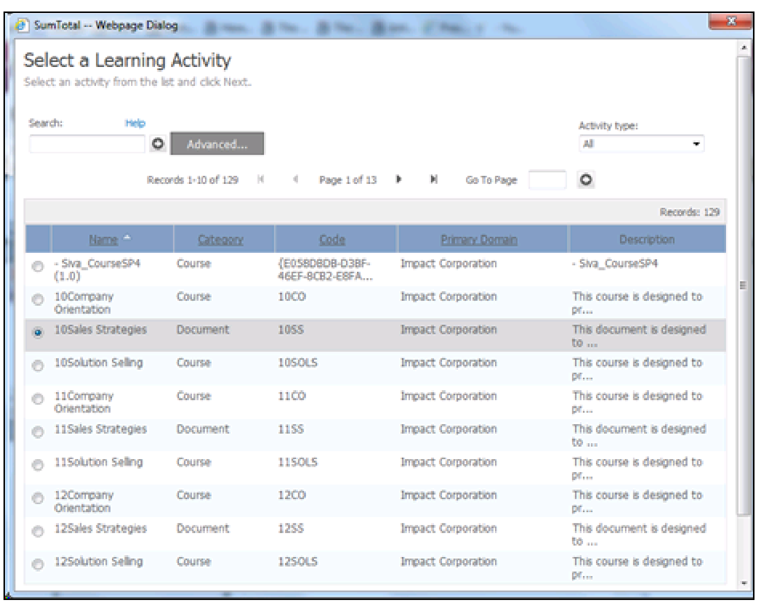
- Step 2.

Click on  and select Subscription Links. The next step will allow you to select the activity that you want to link to your holding activity.




- Step 3.

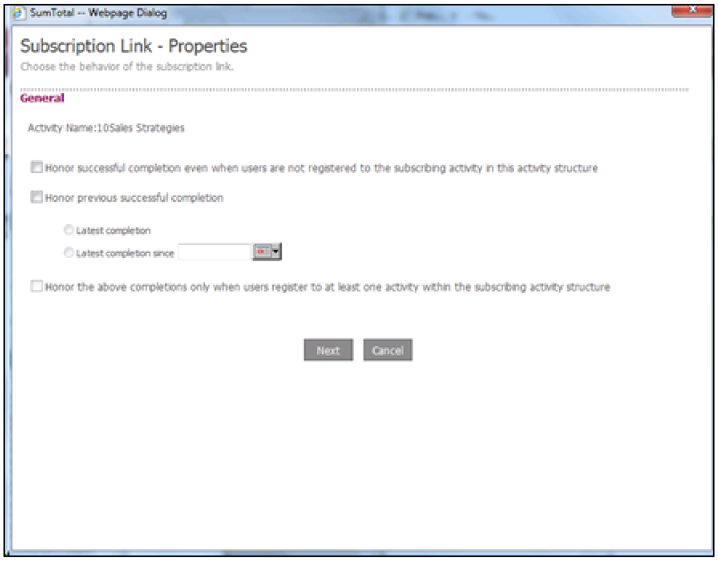
Select the activity that you want to link. Note: If you did not select Can Be Subscribed in the Properties>Status option for the activity you want to link, it will not appear in this list.



- Step 4.

Decide on the properties of your Subscription Links. These options allow you to give credit to a user for successfully completing the activity you are subscribing at some other point in time.

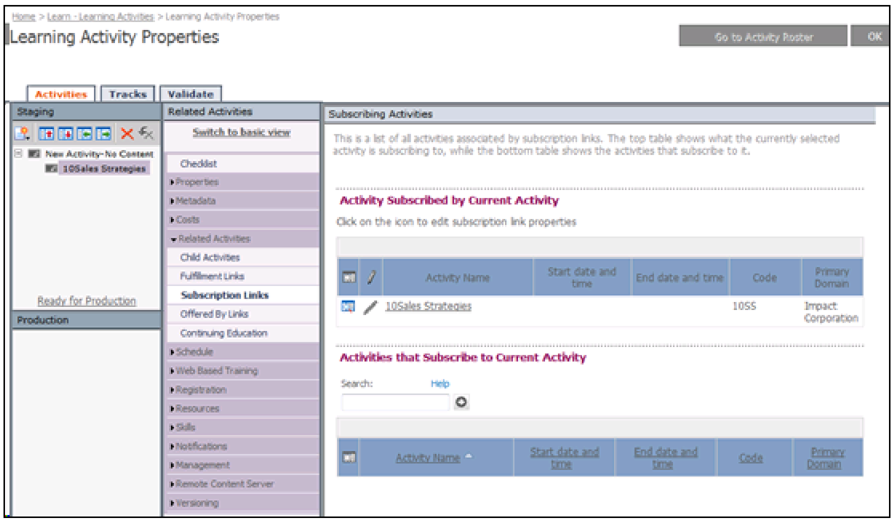
This is an important consideration if you have used the activity in a different activity structure or if it is a stand-alone activity that the Learner may have completed. See the above discussion for more information about these options.




- Step 5.

You will be able to view the Subscription Link association from the Related Activities Property menu. Select the subscribing activity in the Staging area and Subscription Links from the properties menu. It should appear as below, in the Activity Subscribed by Current Activity section.

An interesting behavior of linked activities is they are not modifiable in the current activity structure. Since they reside as a stand-alone activity elsewhere, you may not change any of the properties by selecting the linked activity. If you want to change any of the properties, you will change them at the Parent activity (usually curriculum) level. Changing the properties here will not change the properties of the original subscribed activity, but will change the way the entire activity is delivered at the Parent activity (usually curriculum) level. Note sometimes this can cause conflicts if there are properties that are set at the subscribed activity level that conflict with the parent activity. Review the properties of any activity you are going to subscribe before you add the subscription link to check for any conflicting properties.




## *Impacts and considerations of honoring previous completions*

Points to remember when you add a subscription link to honor previous completions.

- KELMS considers details of only those Learners who have completed the activity successfully, that is, only those Learners whose status for the subscribed activity is "Attended". If a Learner fails to successfully complete the activity, then KELMS does not carry details for such a Learner.
- When you add a subscription link to honor previous completion but do not specify a date, then the last completion, regardless of the date of completion, is carried forward.
- Even if the completed activity has an expired certification, it will be carried forward. If both the parent and the child activity have certification rules defined, the earliest expiration will take precedence. For example parent activity allows 18 month cycle for retraining, but the subscribed activity only has a 6 month cycle then the parent will inherit the 6 month cycle as its expiration cycle.
- Depending on the Honor Completions rules selected, when a Learner registers for an activity structure (such as a curriculum), the application checks if the Learner has completed any activity in an activity structure earlier and allows the Learner to either register for such an activity again or retain previous completion details.
- Grading and Completion rules take precedence, if required to be complete is chosen, it will force the Learner to register for all activities regardless of completion status.

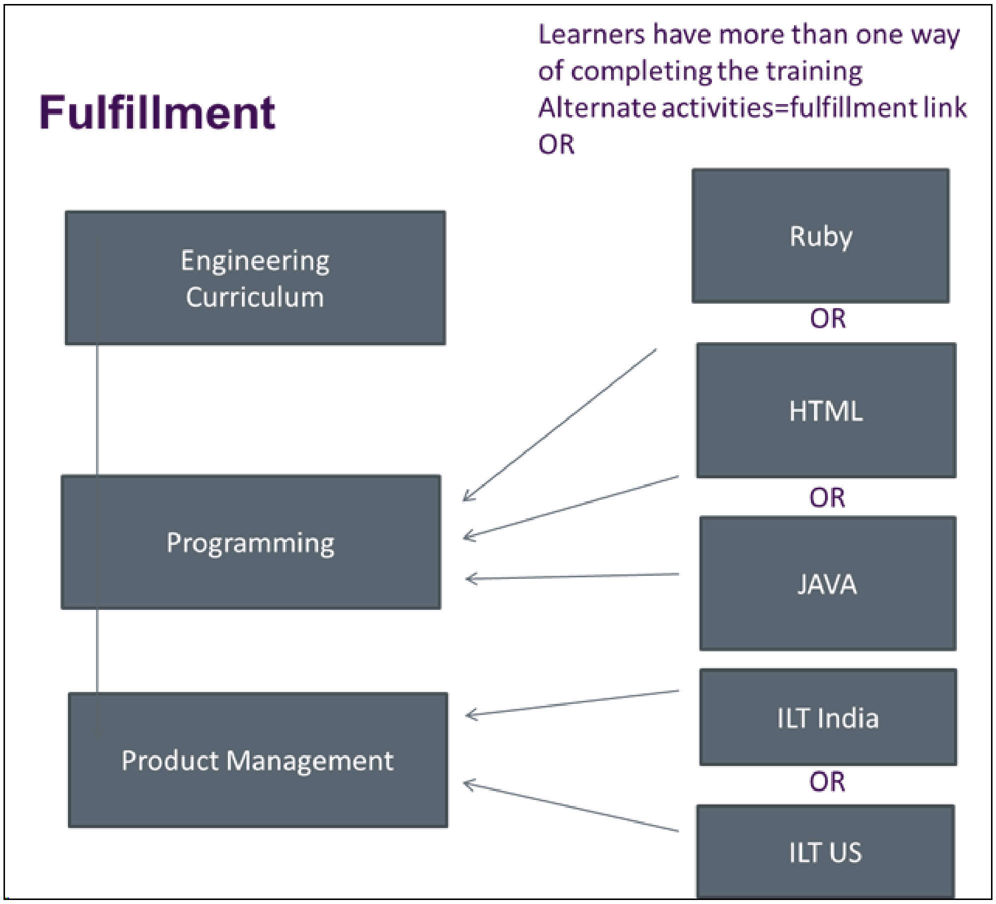
## *Best Practices Summary*

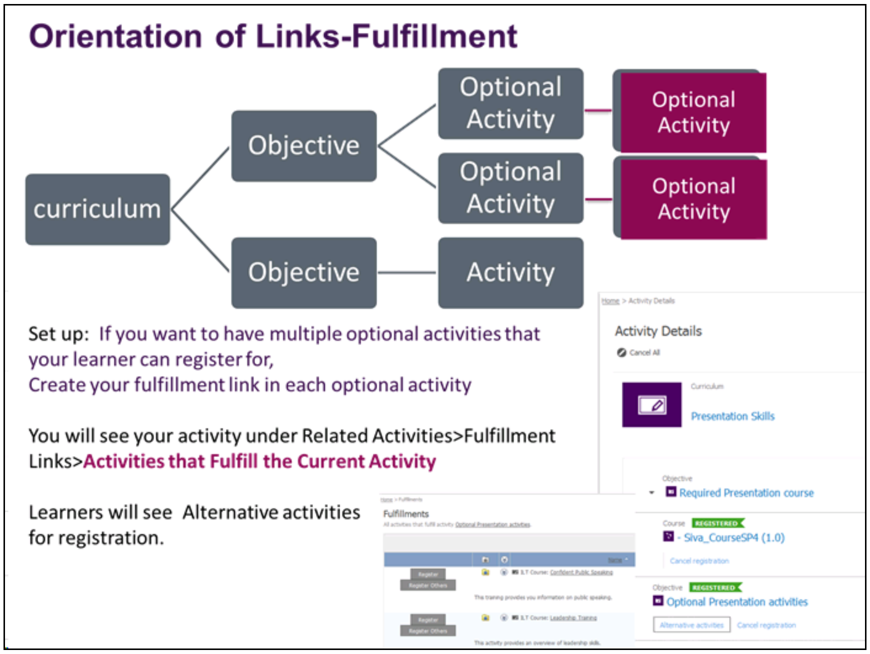
- Using subscription links is the best way to reuse content. Online activities cannot be copied, so using subscription links will allow you to reuse these activities in multiple activities structures. You may want to hide the original activity from Learner and Manager Search so Learners take the activity within the structure(s) that you create, rather than as stand-alone activities. .
- To create a stable easy navigation flow, don't use more than one type of link in large activity structures
- Reporting issues are created by using a fulfillment link and a subscription link between the same pair of learning activities
- Simplify activity structures. Use to no more than 20 subscribed activities and ideally less than 10. This helps to simplify the registration process for your Learners.

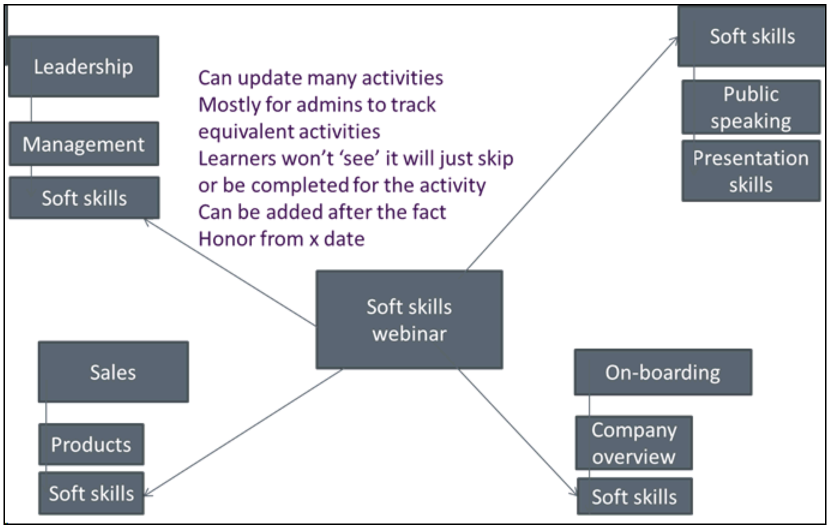
### Fulfilment Links

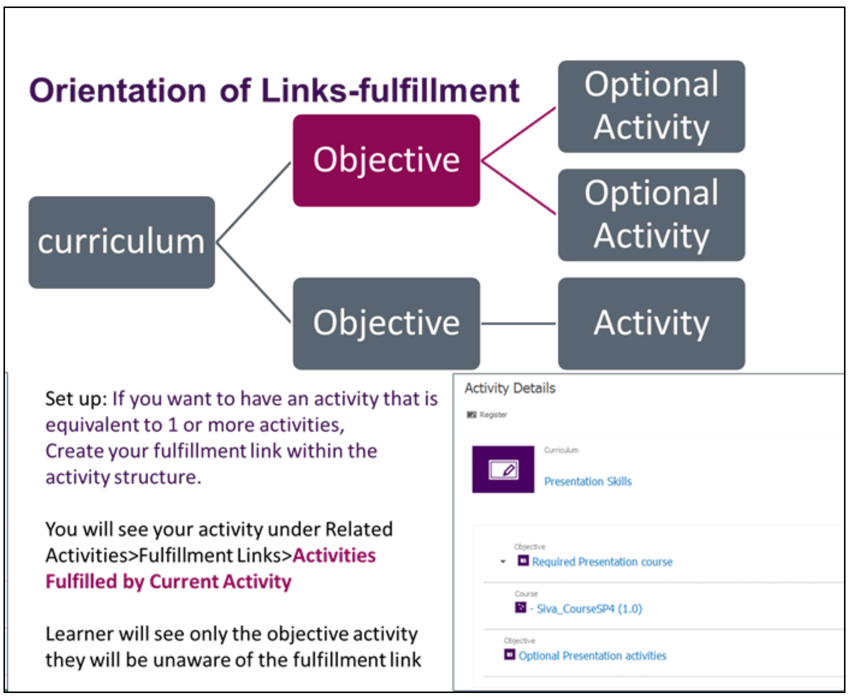
A fulfillment link is a connection between two activities where the completion of one activity meets or exceeds the requirements of the other. When you want a Learner to have more than one way of completing an objective, a fulfillment link can be used to link the activities to one objective. Use a fulfillment link when a Learner can read a document, attend an ILT Class, or take an online tutorial to complete a learning objective. Fulfillment links complete all instances of linked activities, regardless of the structure they are linked to

Fulfillment links create alternate ways of completing an activity. Learning activities that are equivalent can be connected via fulfillment links to provide Learners options for their training. These options could be alternative equivalent content such as different programing languages could all provide equivalent programming knowledge. Options could also include identical training occurring in different locations or different delivery methods such as ILT or virtual webinar.




Orientation of Links-Fulfillment
curriculum
Objective
Objective
Optional Activity
Optional Activity
Activity
Optional Activity
Optional Activity
Set up: If you want to have multiple optional activities that your learner can register for,
Create your fulfillment link in each optional activity
You will see your activity under Related Activities>Fulfillment Links>Activities that Fulfill the Current Activity
Learners will see Alternative activities for registration.
Activity Details
Cancel All
Curriculum
Presentation Skills
Objective
Required Presentation course
Course
REGISTERED
Siva_CourseSP4 (1.0)
Cancel registration
Objective
REGISTERED
Optional Presentation activities
Alternative activities
Cancel registration
Fulfillments
Register
Register Others
Register
Register Others



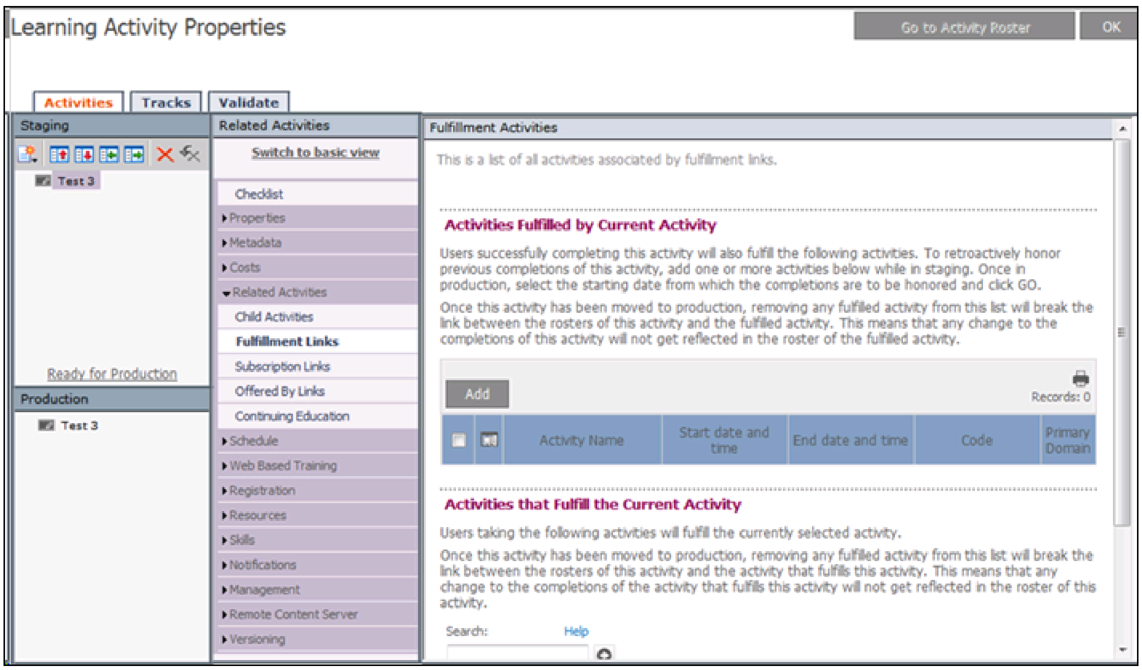

You can also use fulfillment links to track equivalent activities in multiple activity structures. For example, if you offer multiple types of soft skills training opportunities with the same content, you could create a soft skills activity and place fulfillment links to all of the equivalent soft skills training in your system. This would allow you not only to give Learners credit for soft skills training in multiple structures, but would allow you to report on all of the soft skills training offered by your agency. Note it is important that you link the equivalent content (only soft skills) to be able to create an appropriate report. See Advanced Reporting User Guide for more information.

KELMS also supports retroactive fulfillment links. A retroactive fulfillment link allows you to honor past completions of an activity for which a fulfillment link exists. It acts as though the users have completed the activity when you add the link. Only the user's last successful attempt (passing grade) is carried forward to the target activity. This retroactive fulfillment is best used when you unexpectedly need to change content or add a new learning activity that replaces a former activity. They allow you to pass the successful completion of the old activity to the newer activity that you have just created.

### *How do you create a Fulfilment Link?*

- Step 1.

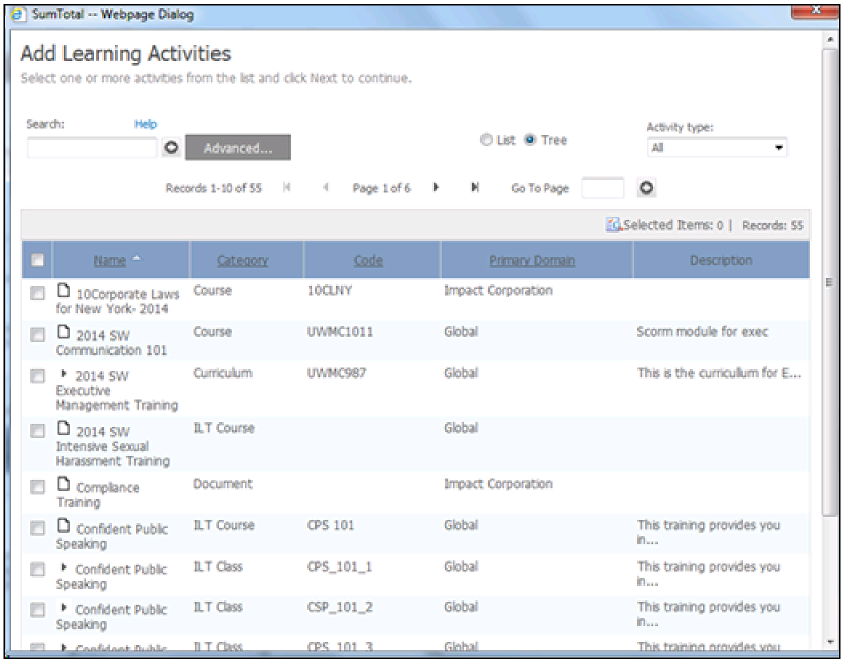
If you are creating a new activity that you want to link retroactively to a comparable older activity, you will need to create an activity. You can use a pre-existing activity if you want to provide multiple options for a structure where you already have the activities in the system. In either case, make sure that the activity has the Can be fulfilled property selected (property>status). With a fulfillment link you will point to the activity you want to be fulfilled by your current activity,




- Step 2.

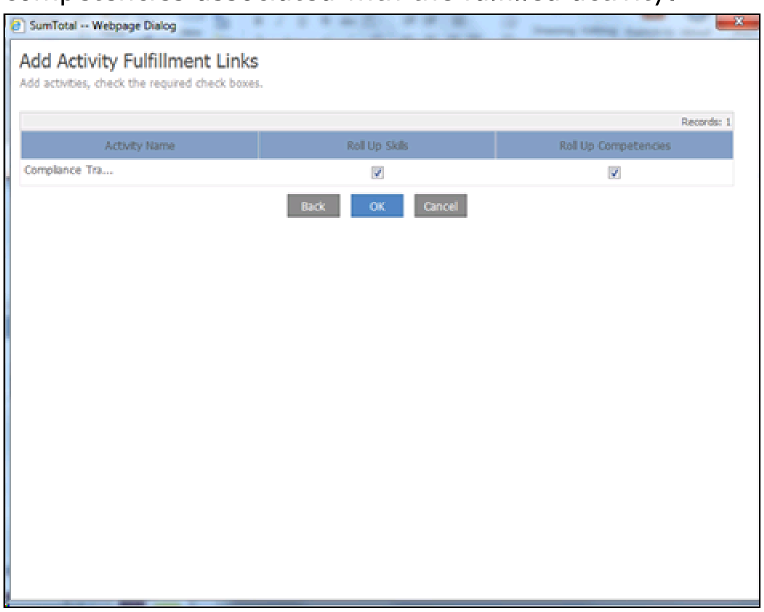
If you are creating a new activity that you want to link retroactively to a comparable older activity, you will need to create the new activity. You can use a pre-existing activity if you want to provide multiple options for completing an activity. Note that you can select multiple activities on this page to add.

Any of the current activities that you use or create will need to have the Can be fulfilled property selected (property>status).



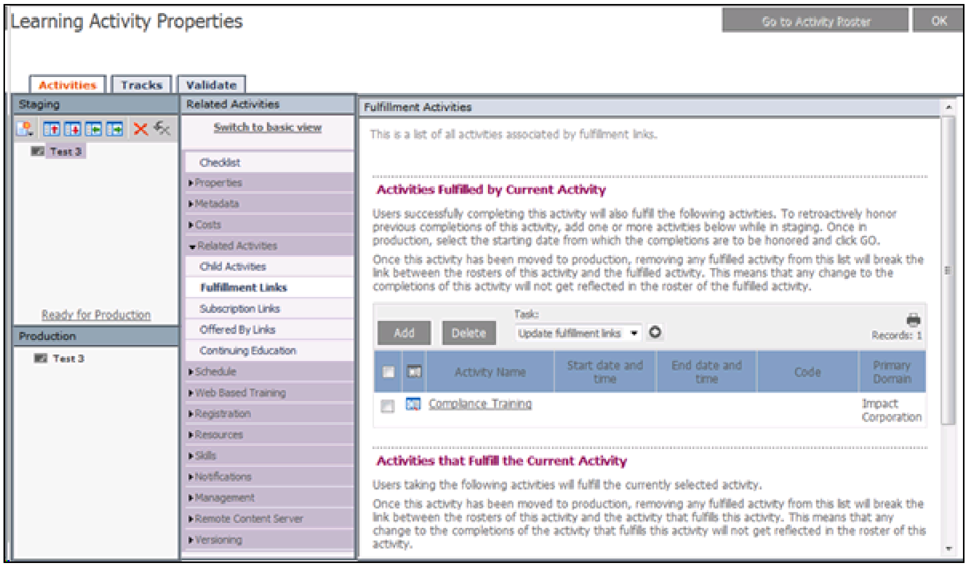

- Step 3.

This option will allow you to decide on the behavior of the link, if you are using skills and competencies. If you select either box, the fulfillment will track the skills and competencies associated with the fulfilled activity.



- Step 4.

If you expand the Related Activities menu you can see the fulfillment links you have added to the current activity. You will not see fulfilled activities in the staging area.




# Reference – Notifications - Letting the Users Know

## Using Notifications

**KELMS offers over 90 different system e-mail notifications** that alert Learners, Instructors, and Training Coordinators when certain events occur in the system. These events **can be schedule by you or triggered by something that happens in the system**. Because they are automatic, the notifications feature saves Administrators hours of time that would be spent manually tracking and sending emails to Learners. Once you set up a notification, **it functions on its own until you need to change it**.

Some examples of System notifications are:

- **Assignment Notification:** Alerts individuals or groups assigned to the activity that it is published and available

- **Registration Confirmation Notification:** Sends an email to individuals who have registered

- **Registration Reminder Notification:** Reminds Learners of an upcoming activity at an interval you select – as many days before the activity starts, or after you have assigned it.

If you need a unique notification, you can create your own by modifying the System notifications. These User-Defined Notifications can be customized with HTML content, sent to anyone you specify, and can be scheduled. Once you build a User-Defined Notification, you can reuse the template for other learning activities as well. This reduces the amount of time you spend developing unique messages.

In addition to sending e-mail notifications, you may choose settings to automatically create Outlook appointments for your users. For information on how to choose this setting, access the System Administrator Guide. You can find an exhaustive list of the System notifications and their properties in the resources section of this document.

### *What's in it for my Users?*

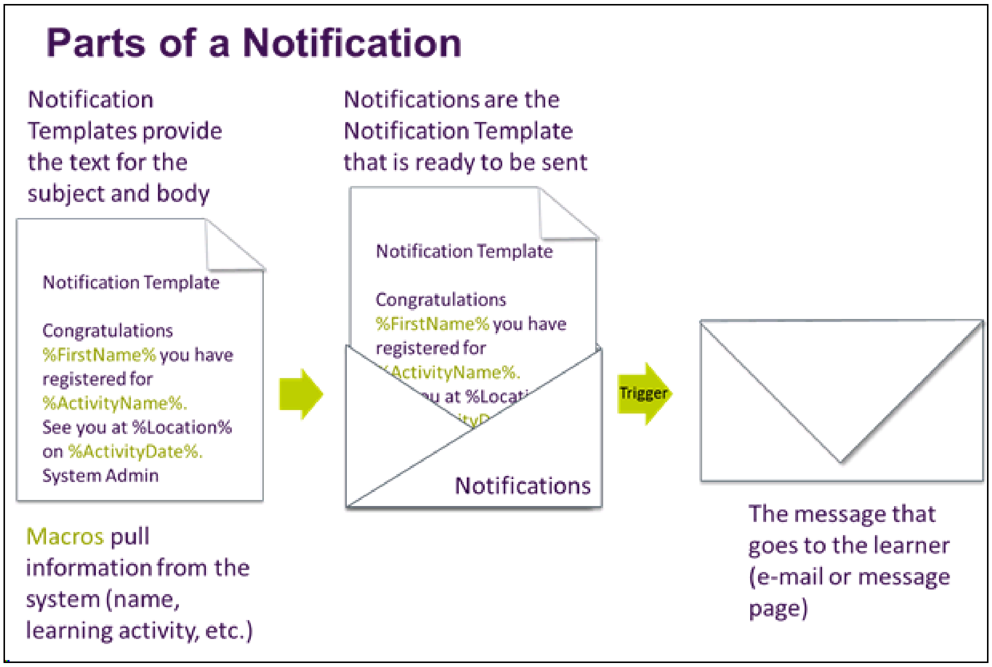
Notifications help your Learners, Managers and instructors stay on top of their commitments. You can also use them to book resources, such as rooms, instructors, and equipment – and ensure they are not double-booked. So you can manage your training classes and logistics effortlessly.

These translate to the following benefits:

- **Automatically Publish Notices in Outlook Calendar:** You can set notifications to automatically publish calendar invitations in outlook. Users can override this if they desire. Also, if you are not using automatic publishing, users can still manually add appointments to their calendars by clicking the links in your notification. Note: Your Administrator must install the Microsoft Outlook Client and ActiveX for this feature to work.
- **Users can choose how they view notifications:** Users can choose the format in which they would like to see the notice. KELMS allows insertion of HTML tags in the body text of a notification template. Users who prefer HTML format see the notice in that way, while users who prefer plain text e-mails receive the notice with all HTML tags stripped out.
- **Users can view notifications in their preferred language:** You can also configure your system or user-defined template to deliver messages in any of our multiple, supported languages. This generates the notice based on the user's preferred language, their domain's language, or the system default language. See the Globalization section of this document.
- **Notify Instructors and other resources of their availability and schedules:** Resource Management Notifications allow you to schedule activities and manage related resources. Using them, you can send notices to an appropriate set of users when instructors are reassigned, locations and schedules changed, equipment scheduled and cancellations occur for any of these resources.

### *Parts of a Notification*

Before using notifications, you need to understand their components. There are 3 parts of the notification: the template, the actual notification, and the message that is sent. The diagram below provides an overview.



## What Triggers My Notification?

Automatic notifications launch based on two types of triggers.

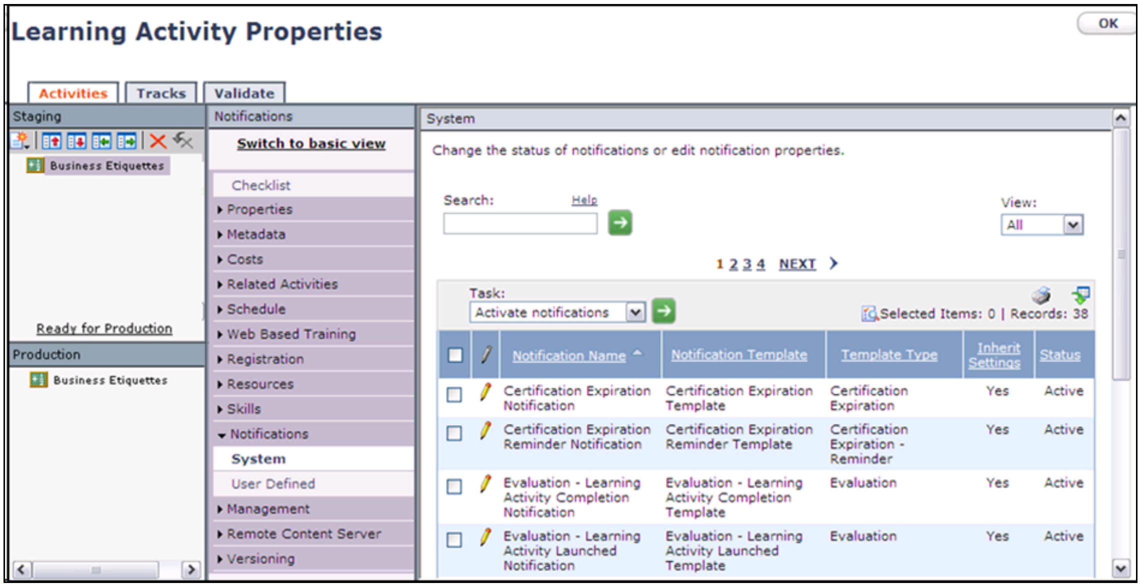
| Trigger Type | Description |
|---|---|
| Schedule-driven Notifications | Schedule-driven notifications trigger at intervals you specify in the Delivery Schedule section of the Notification Properties page. The default schedules are set to 5, 10, and 15 days.<br><br>A Scheduled Job processes and sends Schedule-driven notifications to a queue. You can configure the frequency of the Scheduled Job to suit your needs.<br><br>For example: Set the Certification Expiration Reminder notice to run 5, 10, 15 days before the certification expires. |
| Event-driven Notifications | Event-driven notifications trigger by various actions that users perform in KELMS. These notifications are processed, queued up, and sent as soon as the event takes place. Recipients usually receive such notifications within a few minutes.<br><br>For example: The Registration Confirmation notification triggers immediately after a Learner successfully registers for a learning activity. |

### *Activating Your System Notification*

► **To activate the Activity Assignment Notification**

1. From the Learn menu choose your Learning Activities.
2. Click  next to the name of the learning activity you want to view.
3. In the Staging area select the learning activity. If the activity is not available in the Staging area, click the **Bring to Staging** link, then select it.
4. In the middle **Properties** column, click **Notifications**.
5. Under **Notifications**, click **System**.

A list of any systems notifications for this activity appears.




6. Click next to the **Learning Activity Assignment Notification**.
7. Select **Additional Recipients**, if you want to specify.
8. Click **OK**.
9. Select **Learning Activity Assignment Notification** and select **Activate notifications** from the **Tasks** drop-down.
10. Click **Go**.

## *Adding a User-Defined Notification to Your Learning Activity*

### *Day in the Life Challenge*

Now that you've set up your first notification, you want to create a reminder so Learners can be prepared for class. They need to know class details, such as things to bring on the first day of class and contact numbers for any questions they might have.

### *Possible Solutions*

- Create a unique User-Defined notification
- Do you set up a template first? Please see next Comment for the question.

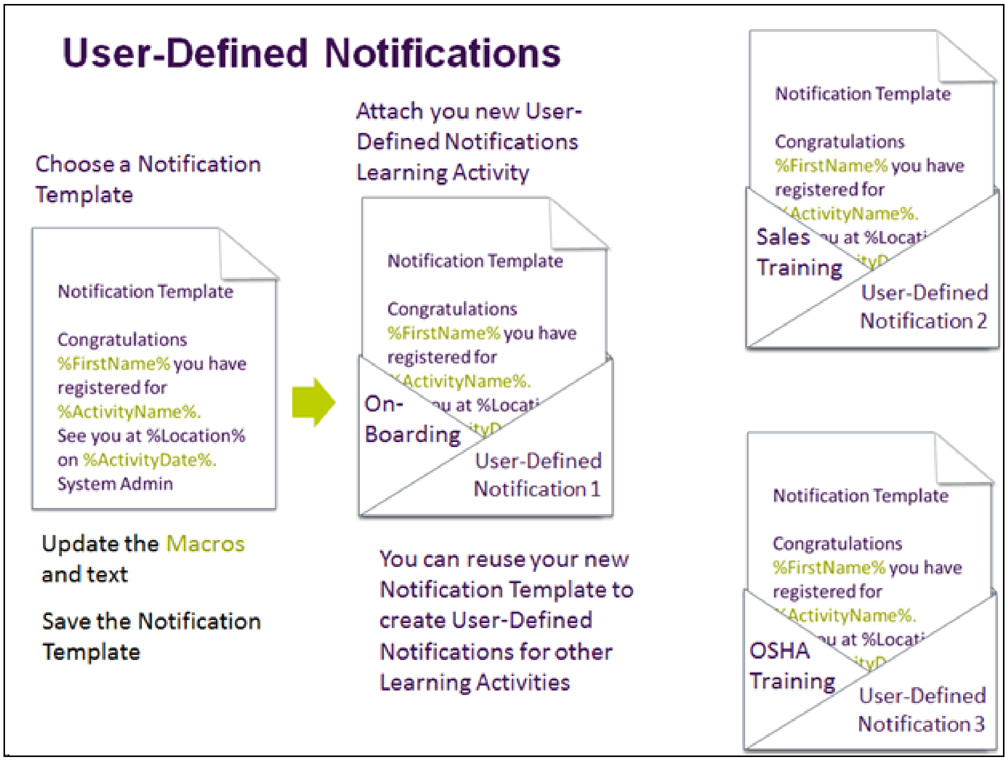
### *About User-Defined Notifications*

If you have permissions, you can create User-Defined notifications to establish who will receive a notification, how often it is sent, who it is from, and what is included in the message.

With User-Defined notifications, you can send new, updated messages about an activity. You can also create your own notifications for specific circumstances, such as notifying users who have already launched an activity who are in progress, sending messages to cancelled users, and CCing an instructor who also needs to be notified of a change. You can also define triggers that makes sense for your activity. For a complete list of editable User-Defined properties, see the User-Defined Notifications Properties topic in the Resources section of this document.

*Note: User-Defined notifications only within specific learning activities. They do not deploy to the entire agency or domain, and you cannot share them between activities, curricula or domains. When you need a new User-Defined notification, create one for the new situation.*

Below is an overview of the process you will follow to create User-Defined Notifications.




► **To create a new, User-Defined notification:**

1. From the **Learn menu choose your Learning Activities**.

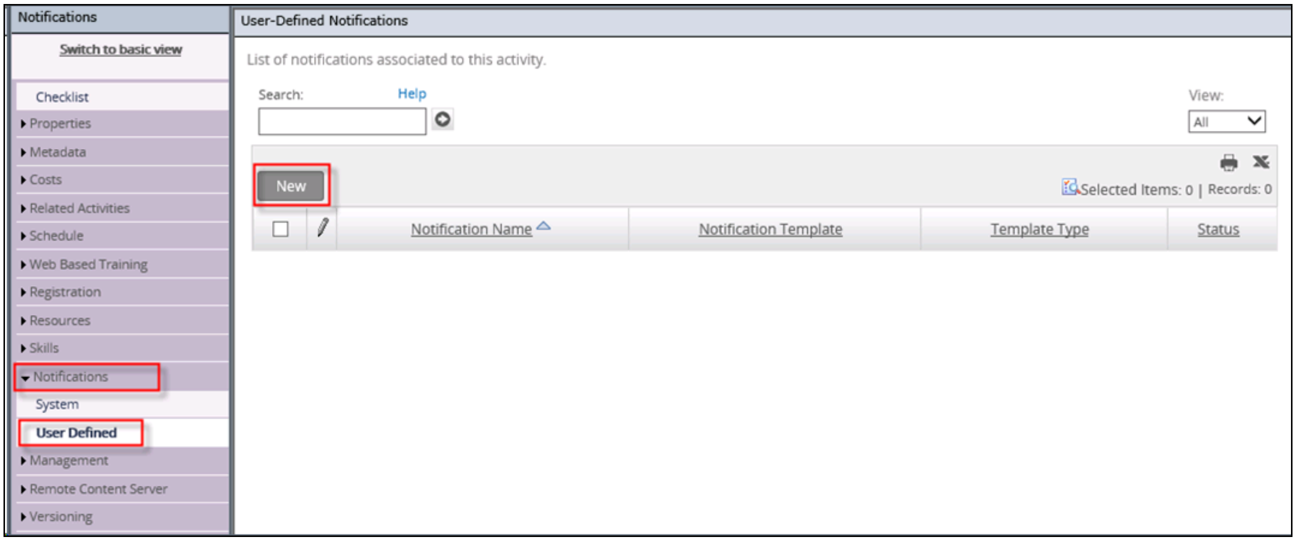
2. **Click the pencil** next to the name of the learning activity you want to view.

3. In the Staging area select the learning activity. If the activity is not available in the Staging area, click the **Bring to Staging** link, then select it.

4. In the middle **Properties** column, click **Notifications**.

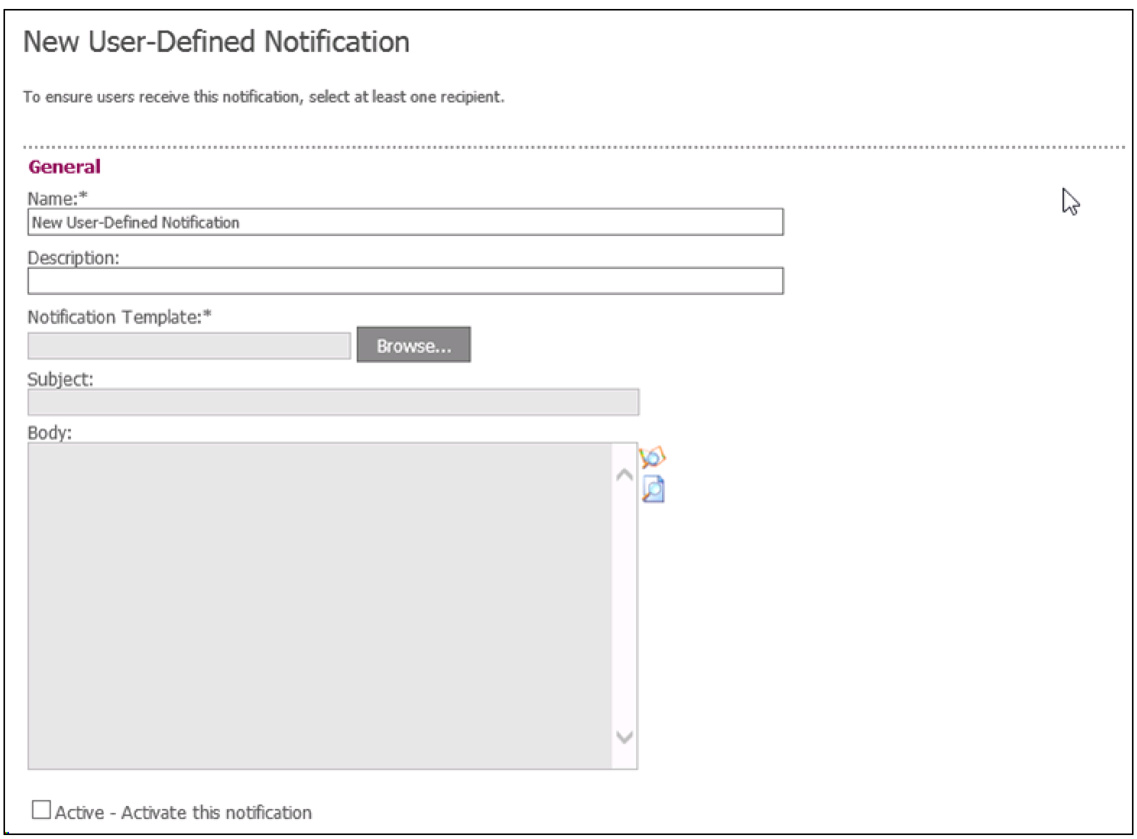
5. Under **Notifications**, click **User-Defined**.

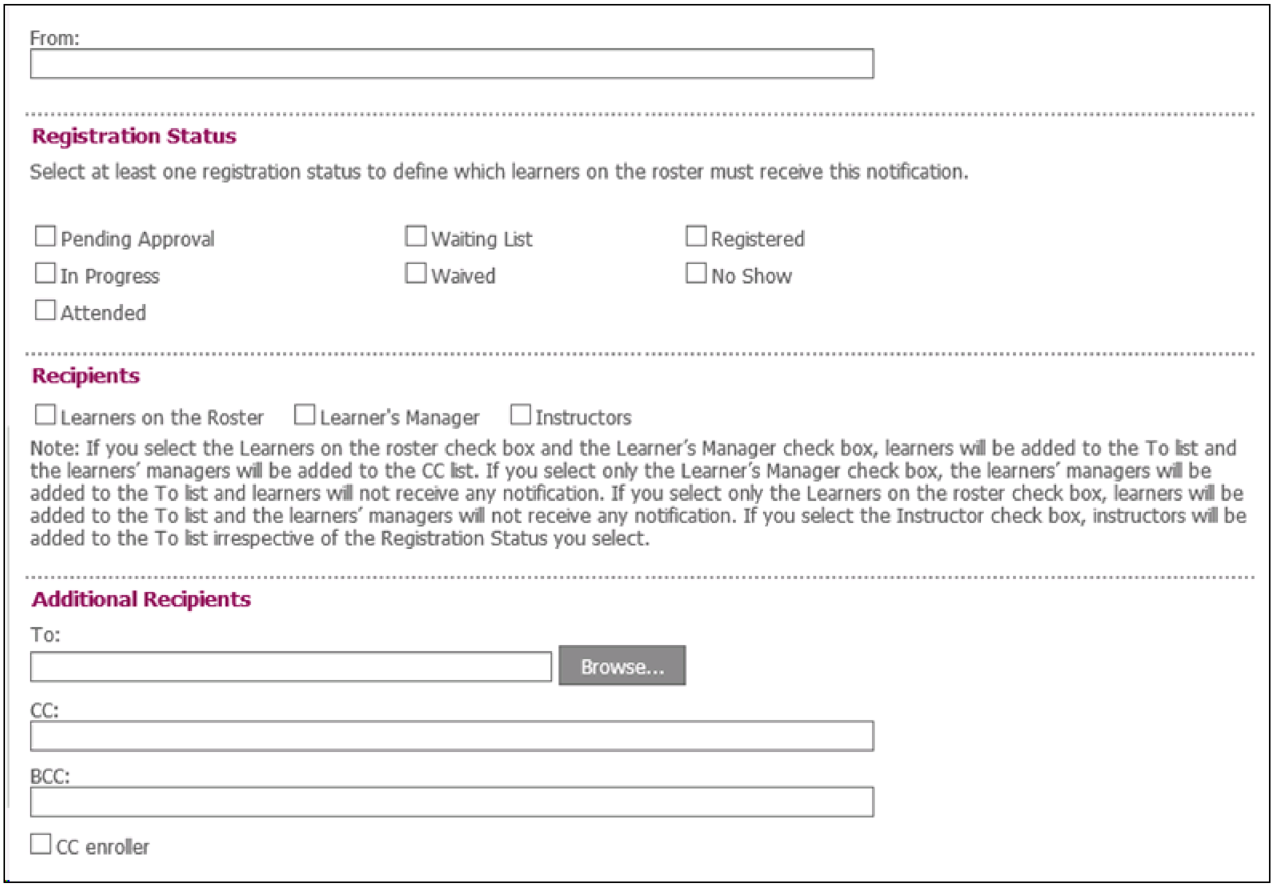
A list of any custom notifications for this activity appears.




6. Click **New**.

**New User-Defined Notification** page appears.




From:

**Registration Status**

Select at least one registration status to define which learners on the roster must receive this notification.

☐ Pending Approval ☐ Waiting List ☐ Registered
☐ In Progress ☐ Waived ☐ No Show
☐ Attended

**Recipients**

☐ Learners on the Roster ☐ Learner's Manager ☐ Instructors

Note: If you select the Learners on the roster check box and the Learner's Manager check box, learners will be added to the To list and the learners' managers will be added to the CC list. If you select only the Learner's Manager check box, the learners' managers will be added to the To list and learners will not receive any notification. If you select only the Learners on the roster check box, learners will be added to the To list and the learners' managers will not receive any notification. If you select the Instructor check box, instructors will be added to the To list irrespective of the Registration Status you select.

**Additional Recipients**

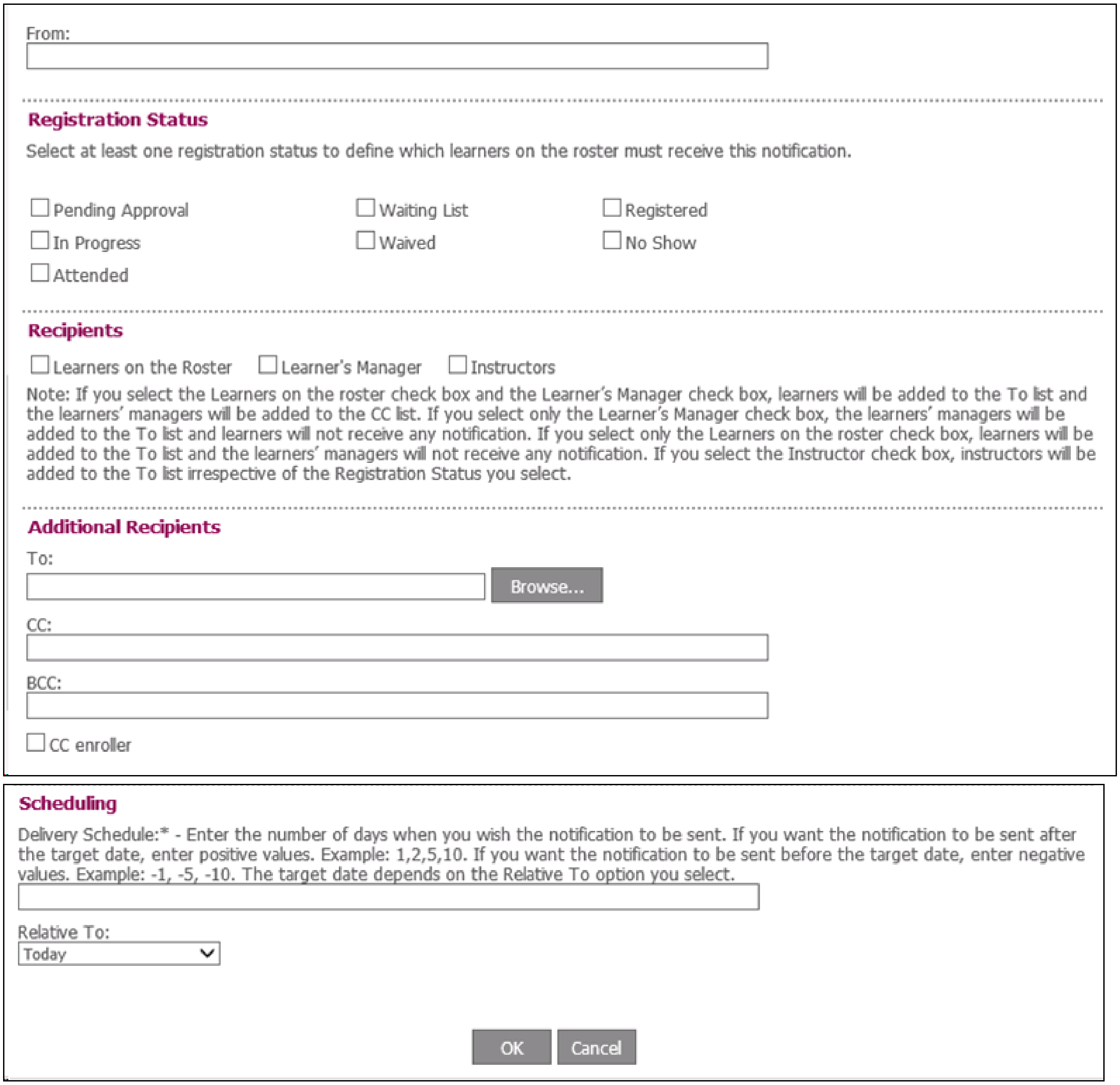
To:

Browse...

CC:

BCC:

☐ CC enroller




7. Enter a name and description for this notification.

8. Click **Browse** to select an existing template.

OR

9. Click **New** to create a template.

10. Enter the required information such as the subject line for the message.

11. Enter the text you want to send in the **Body** field like links your Learners need and any other needed information.

12. Click **OK**.

A page with the name of the new notification appears.

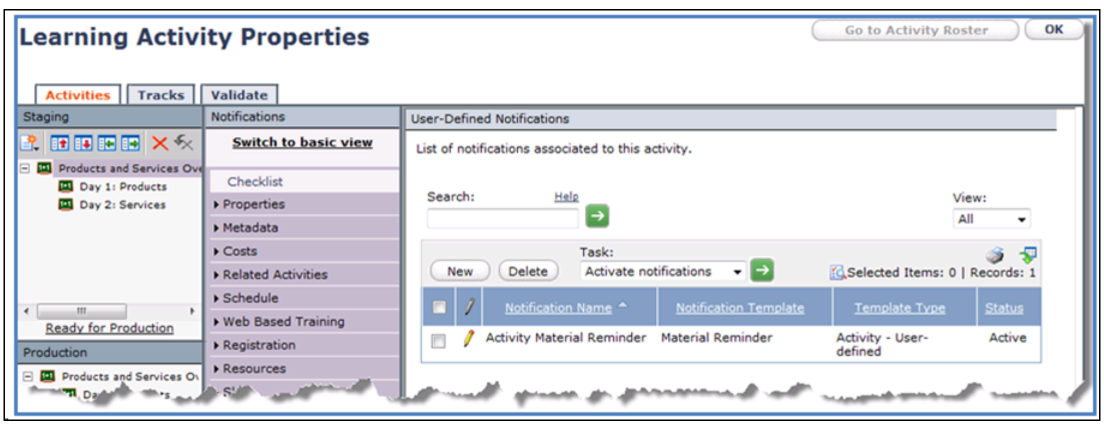
13. Select recipients to include users on the roster or waiting list, instructor, and additional recipients.

14. In the **Scheduling** section, set the schedule when this notification should be sent.

**Note:** You cannot change the schedule once these notifications are sent.

15. Click **OK**.

The **Learning Activity Properties** page looks similar to this:




16. Move the activity structure to production.

### *Creating a Template for Your User-Defined Notification*

You can create a user-defined notification and associate it with a learning activity. To do so, you need to create a template using the user-defined template type. You can create this template in two ways:

- From the **Resources** menu
- From the **Learn** menu

► **To create a new template from the Resources menu:**

1. From the **Resources** menu, click **Notification Templates**.
2. Click **New**.
3. Enter a name and description.
4. Click **Browse** and select the Activity - User-defined template type.
5. Enter the required information such as the subject line for the message. Enter the text you want to send in the **Body** field.
6. Click **OK**.
7. Note: You can associate this template to a learning activity from the Learning Activity Properties page.
8. To create a new notification for a learning activity from the Learn menu:
9. From the **Learn** menu choose **Learning Activities**.
10. Click **Edit** (pencil icon) next to the name of the learning activity you want to view.
11. In the Staging area select the learning activity. If the activity is not available in the Staging area, click the **Bring to Staging** link, then select it.
12. In the middle **Properties** column, click **Notifications**.
13. Under **Notifications**, click **User-Defined**.
14. A list of any custom notifications for this activity appears.
15. Click **New**.
16. Enter a name and description for this notification.
17. Click **Browse** to select an existing template.
18. OR
19. Click **New** to create a template.
20. Enter the required information such as the subject line for the message. Enter the text you want to send in the **Body** field.
21. Click **OK**.
22. A page with the name of the new notification appears.
23. Select recipients to include users on the roster or waiting list, instructor, and additional recipients.
24. In the **Scheduling** section, set the schedule when this notification should be sent.
25. Note: You cannot change the schedule once these notifications are sent.
26. Click **OK**.

### *Viewing and Editing Notifications for Your Learning Activity*

*Day in the life challenge*

| Now that you have launched your Sales on-boarding, Sales Managers have asked to be informed of the classes that their team will attend. |
|---|

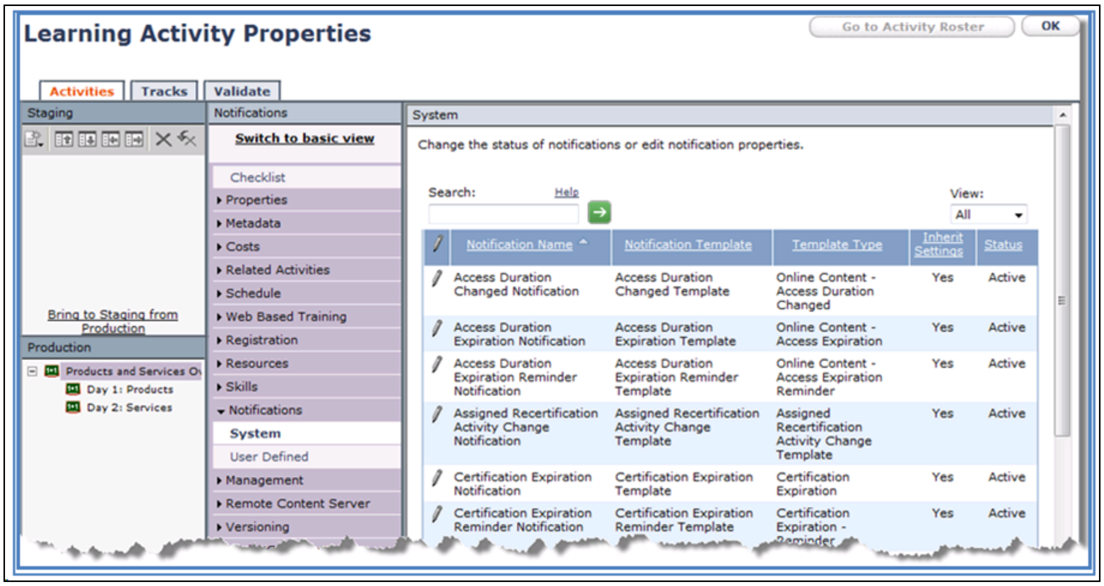
*Possible Solutions*

- View your notification.
- Update the notification for the on-boarding activity to include a CC to the Manager.

*Task steps:*

1. From Administrator mode, select **Learn**, then click **Learning Activities**.
2. Search for and locate your class, and click the **Edit** icon.
3. On the **Learning Activity Properties** page, in the middle column, click **Switch to advanced view**.
4. From **Notifications**, click **System**.

The page looks similar to this:



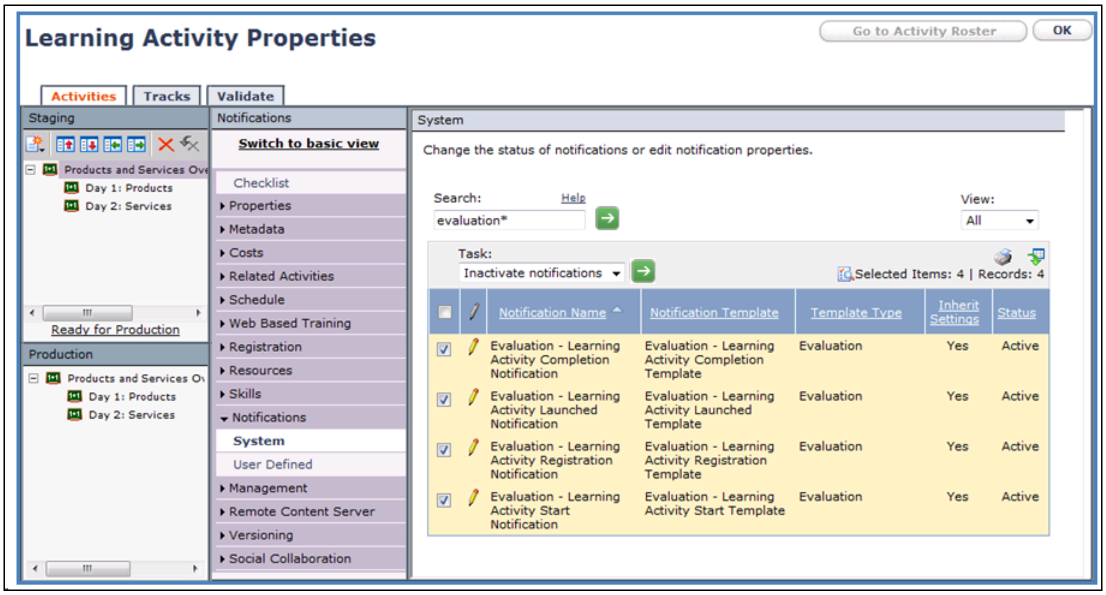
### *Editing Your Notification*

You can edit the system notifications included in the Global domain and inherited by all domains and learning activities in these domains.

*Task steps:*

1. Verify that you are in Administrator mode.
2. From the **Learn** menu, click **Learning Activities**.
3. Search for and locate the *#Products and Services Overview – 1st Month ILT Class*, and click the **Edit** icon.

4. On the **Learning Activity Properties** page, bring the structure into the staging area.
5. In the middle column, click **Switch to advanced view**.
6. From **Notifications**, click **System**.
7. Locate and select the check boxes associated with the four notifications related to evaluations.
8. Remember that because these are inherited notifications, you will first have to clear the Inherit domain settings check box for each notification before you can edit its other properties.
9. From the **Task** list, select **Inactivate notifications** and click **Go**.




10. Move the activity structure to production.

## *Modifying Your Notification Template*

*Day in the Life*

Your agency has decided that they would like to create more visually pleasing e-mail notifications with agency logo and brands. You are tasked with adding the agency logo and appropriate brand fonts to the notification templates using HTML.

*Possible Solution*

Modify your notification templates to incorporate branding. You choose to start with a notification that is sent when someone registers for a New Hire class.

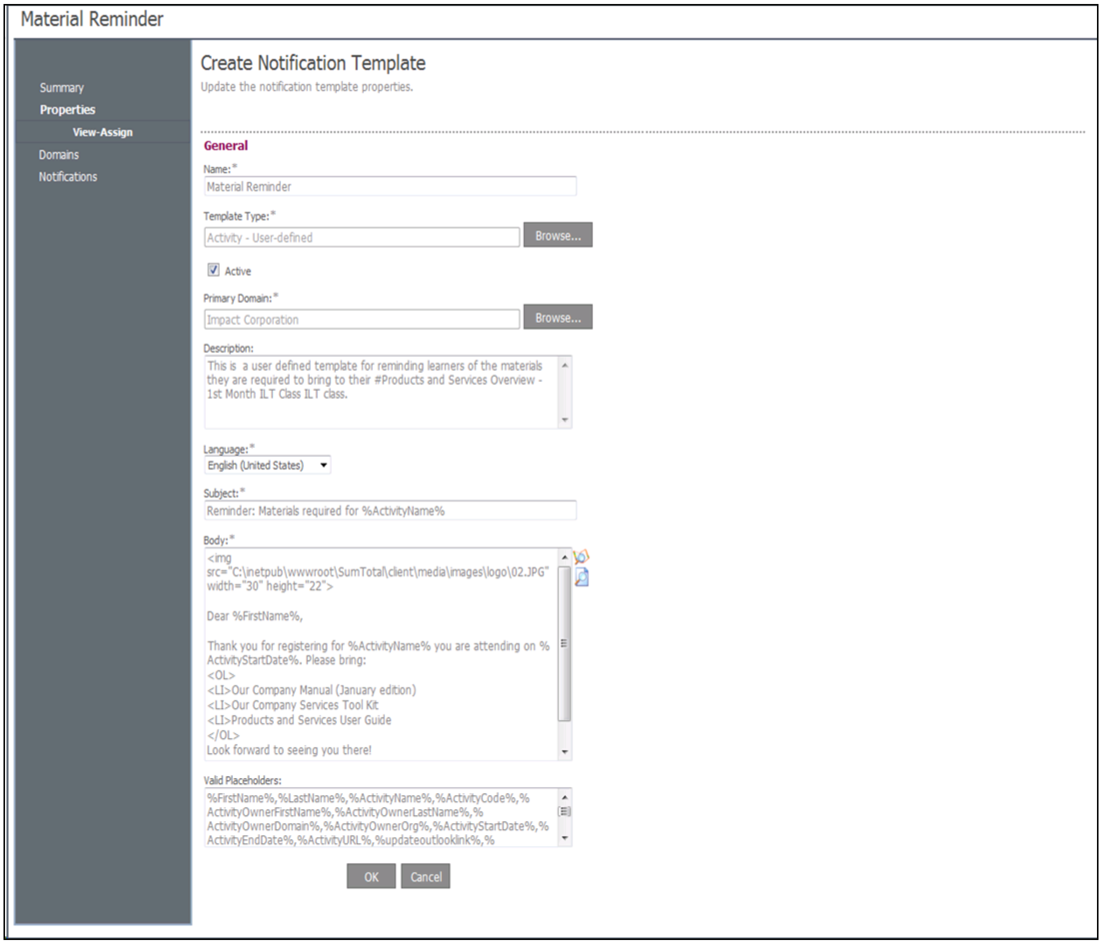
You can modify any notification template to reflect your own verbiage, class needs or agency culture.  An e-mail notification template contains a field for the subject line and a field for the message body. Also, you may add HTML tags in the body text of a notification template. The HTML tags that you enter will not be validated by the system. For users who prefer to receive plain text messages, the system will automatically take out the HTML tags.

*Task steps:*

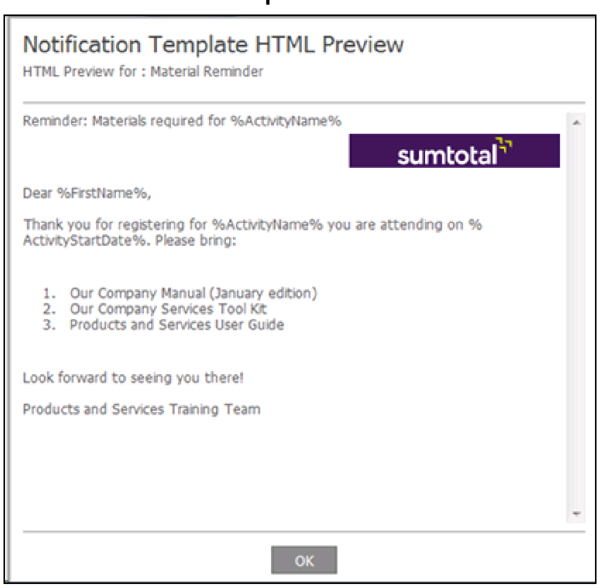
1. From Administrator mode, select **Resources**, then click **Notification Templates**.
2. On the **Notification Templates** page, click **New**.
3. On the **Notification Template Properties** page, create a new notification template using the details in the following table.

| Property | Task Input |
|---|---|
| Name | Name your template. In this case, you could choose: Reminder Email for New Hires |
| Template Type | Activity - User-defined<br>(This is required for user-defined templates.) |
| Active | Checked |
| Primary Domain | Ensure the notification appears in a domain that you use. If you want this notification available globally, select the Global Domain. |
| Description | Enter a description for your template. This description will outline how the template is used, as well as its triggers and other information you think will be useful to Administrators. In This case, This is a user defined template for reminding Learners of the materials they are required to bring to their #Products and Services Overview - 1st Month ILT Class ILT class. |
| Language | Select the language you will use. In this case, select English. |
| Subject | Enter a Subject. As an example you could write:<br>Reminder: Materials required for %ActivityName% |
| Body | Enter the content for your message, brand and logo details. An example could be:<br><img<br>src ="C:\inetpub\wwwroot\SumTotal\client\media\images\logo\02.JPG" width="30" height="22"><br>Dear %FirstName%,<br>Thank you for registering for %ActivityName% you are attending on %ActivityStartDate%. Please bring:<br><OL><br><LI>Our Agency Manual (January edition)<br><LI>Our Agency Services Tool Kit<br><LI>Products and Services User Guide<br></OL><br>Look forward to seeing you there!<br>Products and Services Training Team |

The page looks similar to this:




17. Click the Preview HTML icon next to the Body field to preview the body in HTML. The **Notification Template HTML Preview** window looks similar to this:



18. On the **Notification Template HTML Preview** page, click **OK**.
19. On the **Notification Template Properties** page, click **OK** to save your new template.

Now, you can assign your template to appropriate New Hire activities.

As a reference, you can edit the following items on the Notification Template Properties page:

| Property | Definition |
|---|---|
| Name | A unique name assigned to the notification template. |
| Template Type | Select an appropriate template type for the notification template.<br>User-defined notification templates must always be of Activity - User-defined type. |
| Active | Select this check box to make the notification template active. |
| Primary Domain | Specify a primary domain for the notification template. |
| Description | A brief description of the notification template. |
| Language | Specify a language supported by the system. |
| Subject | Indicates the text sent in the subject line of the e-mail message. |
| Body | Includes the content of the e-mail message. Content can be formatted by using basic HTML tags in the message body. |
| Valid Placeholders | Lists all the macros that can be used in the body. This list is based on the template type chosen. |

### *Setting up Registration Properties*

With appropriate permissions, you can set up learning activities with different registration criteria. For example, you may want to ensure that the number of Learners does not exceed the maximum available seats for a class or that Learners meet a particular standard before they register for specific training.

### *Adding Learners Directly to an Activity Roster*

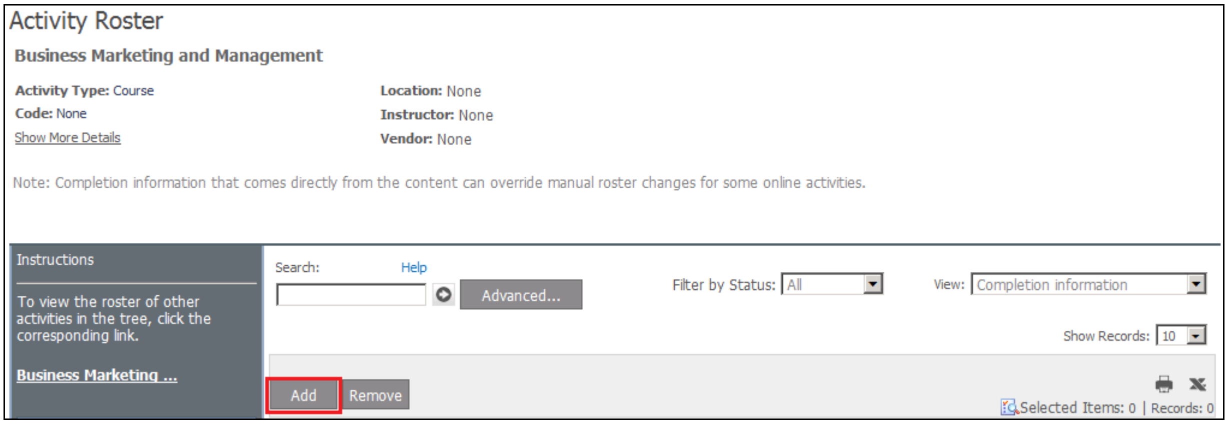
Based on your permissions, you can add users directly to an activity roster, bypassing all registration checks. You have the authority to view all activities that are stored in your managed domains and sub-domains as well as activities that are shared with these domains.

Adding Learners directly to a roster from the **Learning Activities** page or from the **Activity Staging Editor**, bypasses all registration checks. Users who are registered from the **Activity Roster** page are added directly to the activity roster, regardless of whether or not they qualify for the learning activity.

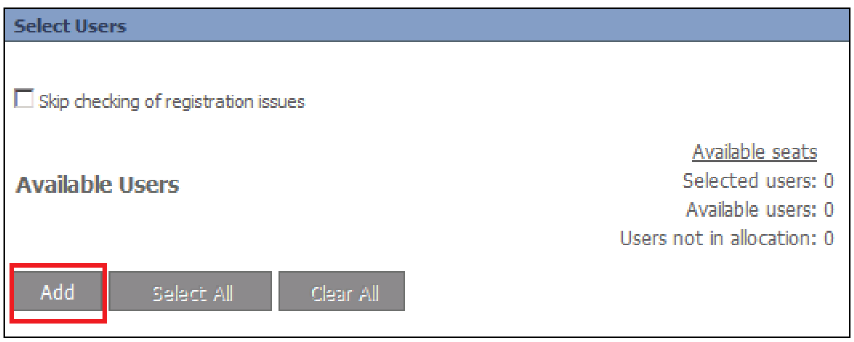
► **To add users to an activity roster:**

1. From the **Learn** menu, click **Learning Activities**.

2. On the **Learning Activities** page, search for and locate the required learning activity.
3. Click the (**Manage Roster**) icon to access the **Activity Roster** page.
4. On the **Activity Roster** page, click **Add**.




5. On the **Batch Registration** window, select the radio button associated with the activity.
6. Click **Continue**.
7. From the **Select Users** section, click **Add**.

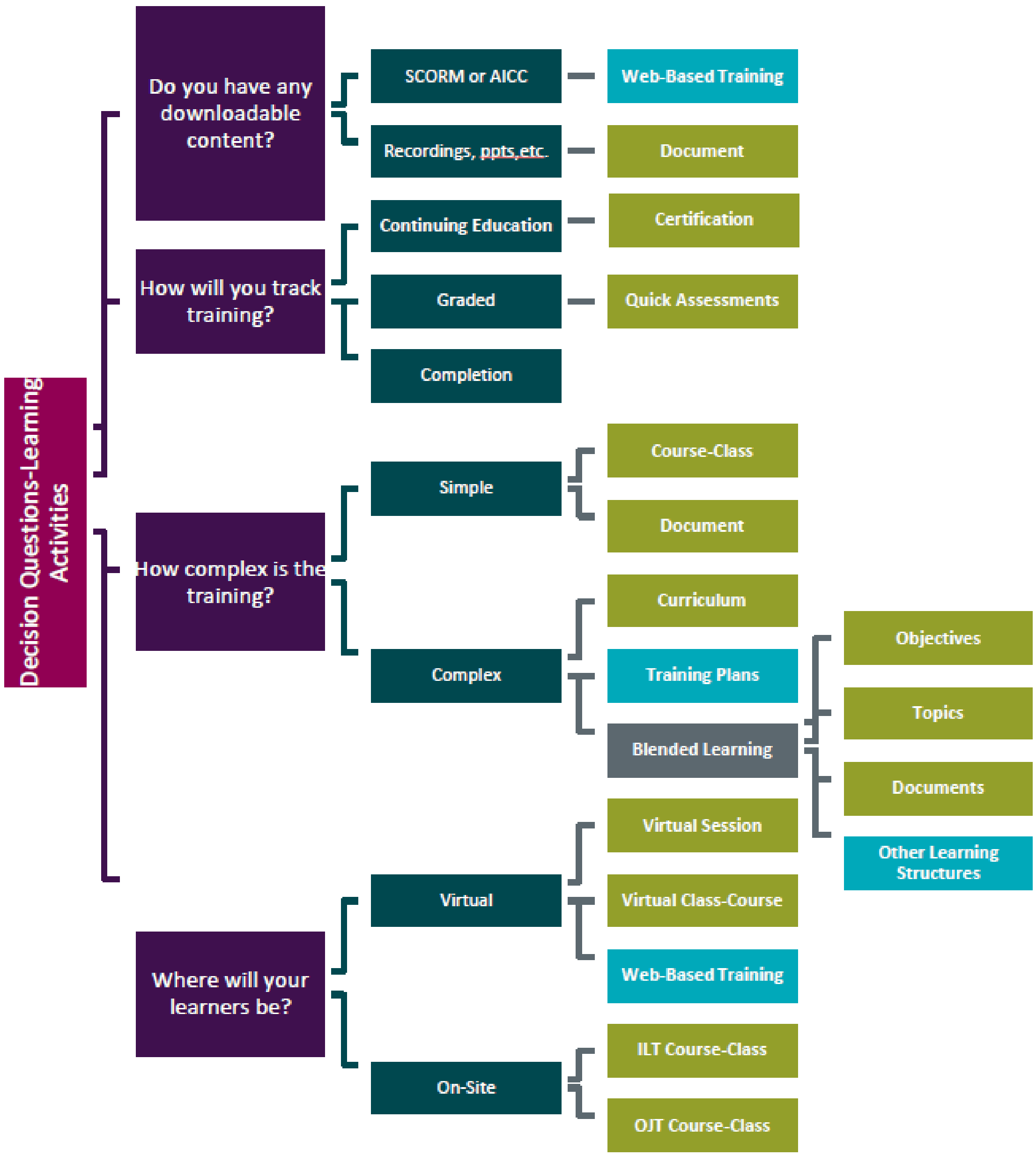



*Note: You can select* ***Skip checking of registration issues*** *to bypass the registration checks.*

8. On the **Select Users** page, click the radio button associated with the required option and click **Next**.
9. Search for and select the necessary users.
10. Click **OK** to add the selected users.
11. From the **Available Users** section on the **Batch Registration** page, select the users and click the > icon.
12. On the **Batch Registration** page, click **Submit**.

# Reference - Learning Activity Creation Guidelines

Follow the diagram below:



# Reference - KELMS Course Code Development

| Cabinet & Agency | Delivery Method | Common Category/Types |
|---|---|---|
| 5 digit numeric | 3 alpha | 3 Alpha |
| Required | Required | Required |
| 57886 | ILT | TEC |

***Cabinet and Agency Code***
1. *First two numbers is the cabinet identifier*
2. *Last three numbers is the agency identifier*

***Delivery Method Acceptable Codes***
1. *Instructor Led Training (ILT)*
2. *Online Training (CBT)*
3. *Blended Learning (BLE)*
4. *Meeting (MTG)*
5. *Webinar (WEB)*
6. *Conference (CON)*
7. *Acknowledgments (ACK)*
8. *On the Job Training (OJT)*

***Common Category Types Acceptable Codes***
1. *Human Resources (HR)*
2. *Information Technology (TEC)*
3. *Professional Growth & Development (PGD)*

To request KELMS access, please complete the below form and submit the request to the KELMSGSCGroup@ky.gov. New users must complete training before access can be granted. Form is available on the KELMS Webpage.

# KELMS Access Request Form

Cannot use more than one request type per form

**Request Type**

- ◯ Add - Begin Date ______
- ◯ Change - Begin Date ______
- ◯ Revoke - Begin Date ______

NOTE: "Change" means all existing system access will be removed and replaced with below for requested systems.

**Employee Information**

| | | | | | |
|---|---|---|---|---|---|
| Employee ID | | First Name | | Last Name | |
| User's E-Mail | | Phone | | KHRIS ORG# | |

**Approving Authority**

| | | | |
|---|---|---|---|
| Supervisor Name | | Supervisor E-Mail | |
| KELMS Domain Administrator | | KELMS Domain Administrator E-Mail | |
| Agency Security Contact | | Agency Security Contact's E-Mail | |

**Access Requested**

KHRIS Roles:
- ☐ Domain Administrator
- ☐ Training Coordinator
- ☐ Instructor

EBI Training Records: ☐ New User ☐ Already a User

COT Billing Code ______

Agency / Cost Cntr ______

**This Section Only Required for Contractors**

Contractors access/usage in the KELMS system can cause the requesting agency/third-party vendor to incur a cost for an additional license in the system.

Funding Source for Additional Cost ______

- ☐ Add ☐ Remove
- ☐ Contractor will provide training to others
- ☐ Track Contractor's completed training in KELMS

**KELMS Domain Administrators** have the ability to create courses and/or upload them, offer assistance to trouble shoot issues with users and assign roles and security within the domain. They also have access to the SumTotal portal to participate in community activities and online training. Users with this role have default employee permissions. They can create, manage, and configure all components specific to that domain and its sub domains. Users will not be able to manage supplemental data and global settings of the application. Users have Author rights in Advanced Reporting. Once certified, users can create custom Reports through Jaspersoft.

**KELMS Training Coordinators** have default employee permissions plus additional administrator permissions such as the ability to: create new users (can add and edit but not delete users), assign skills as requirements, build competency assessments, build the course catalog, schedule events, manage rosters, enroll anyone into classes, publish courses, build agenda, manage supplemental data such as vendors, locations, and equipment, and view and run advanced user reports.

**KELMS Instructors** have default employee permissions plus the ability to create an offering from an event, create assessments, create their own development plan, register others for courses, fully manage rosters, approve training requests, and view evaluations. Instructors are those who may teach classes or conduct workshops and are most often associated with instructor-led or virtual classes.

**EBI Training Records Users** will have log in credentials for the EBI website and display access. They will have the ability to run/refresh reports created for the agency/cost center indicated above. They will also be able to export reports from the EBI website to excel, pdf, etc. There is a $250.00/year license fee associated with this for New Users.

NOTE: If already an EBI user, you will not be charged twice for additional access.