Log-in

- From the LEARN page click on the *PeopleSoft* link.
- Enter your User ID and Password.
- Click on PeopleSoft.
- Click on Enterprise Learning 9.0

Creating Activities

The steps in this section will guide SIRs through entering an Activity (course) in ELM.

Begin by navigating to the **Maintain Activities** page.

- Click the **Enterprise Learning** link.
- Click the **Catalog** link.
- Click the **Maintain Activities** link.
- Click the **Add a New Value** tab.

On this page you will select the combination of the Catalog Item (MIP Component) and the appropriate Delivery Method. You may only select one delivery method per activity, and it should be the primary method for the particular activity. This selection point is very important because there is not an option to correct the selection of the Catalog Item/Delivery Method combination. Therefore, if a correction needs to be made the activity will have to be deleted and a new activity created.

- Click the **Look up Delivery Method ID (Alt+5)** button. You can search for this information in a variety of methods. You can enter a few letters or the first word of the Catalog Item in the **Catalog Item** field. You can also use the column headings to sort the data alphabetically.
- Enter the desired information into the **Catalog Item** field.
- Enter a valid value.
- Click the **Look Up** button.
- Click the appropriate link.
- Click the **Add** button.

The title of the activity is entered in the **Activity Code** field. This field is limited to 30 characters/spaces. The Activity Code should **begin** with the school/department four digit location number, and the remainder of the field can be used for the course title (i.e. a CSDC course title would appear as **9150-Excel for Beginners** – where 9150 is the location number for CSDC, and Excel for Beginners the title of the course). Enter the desired information into the **Activity Code** field.

The **Start Date** is a required field and defaults to the current date. Enter the Start Date of the course by using either the calendar icon, or directly entering the date in MM/DD/YYYY format. Enter the desired information into the **Start Date** field.

The **End Date** is not a required field but must be entered in order for proper processing of the learning component sequence for the activity. Enter the **End Date** of the course by using either the calendar icon, or directly entering the date in MM/DD/YYYY format. Enter the desired information into the **End Date** field.

The **Approval Type**, **Special Approver**, and **Administrator** fields are not currently being used and should remain blank.

The **Primary Instructor** field is not currently being used and should remain blank.

The **Language** field defaults to English and should not be changed.

The **Inservice Points** field will default from the Catalog Item. If the default setting for the particular activity needs to be edited, enter the correct Inservice Points into the field. Enter the desired information into the **Inservice Points** field.

The **Owner** field will default based on the log-in information and should not be changed.

Activity Incentives

Click the **Activity Incentives** link.

Select the appropriate State data:

- Select the appropriate State **Evaluation Method** for this activity. Click the **Evaluation Method** list.
- Click the appropriate list item.
- Select the appropriate State **Follow Up Method** for this activity. Click the **Follow Up Method** list.
- Click the appropriate list item.
- Select the appropriate State **Primary Purpose** for this activity. Click the **Primary Purpose** list.
- Click the appropriate list item.

The **Activity Incentives** are not currently being used and should remain blank.

Adding Learning Objectives

- The selection provided includes only the Learning Objectives that are currently mapped to the particular Catalog Item.
- Click the **Look up Add (Alt+5)** button.
- For “generic” components only the Learning Objectives that directly pertain to the Activity being registered should be selected. For “specific” components all of the available Learning Objectives will need to be selected.
- Click the appropriate link.
- Add a new row to add additional objectives. Click the **Add a new row at row 1 (Alt+7)** button.
- Repeat the previous steps until all applicable Learning Objectives have been added.
- Click the **OK** button.

The functionality for the **Payments** section is not currently being used, so no data should be entered in these fields.

The functionality for the **Learning Period** section is not currently being used, so no data should be entered into these fields.

Ensure that the checkbox is "checked" under the **Published Duration** section. This should default from the Catalog Item.

The **Start Reminder** feature is not currently enabled and should remain blank.

The only field in the **Enrollment** section that needs to be completed is the **Max Enrollment** field.

Enter the desired information into the **Max Enrollment** field.

The **Waitlist** fields are defaulted and should remain as populated.

The **Drop Activity** fields are defaulted and should remain as populated.

In the **Grades and Attendance** section the default setting should have the Enforce Prerequisites checkbox "checked". This is the only setting that should be set in this section.

The **Learning Environment** will default to Schools & Departments and should remain at this setting. The **Primary** checkbox should be selected as a default.

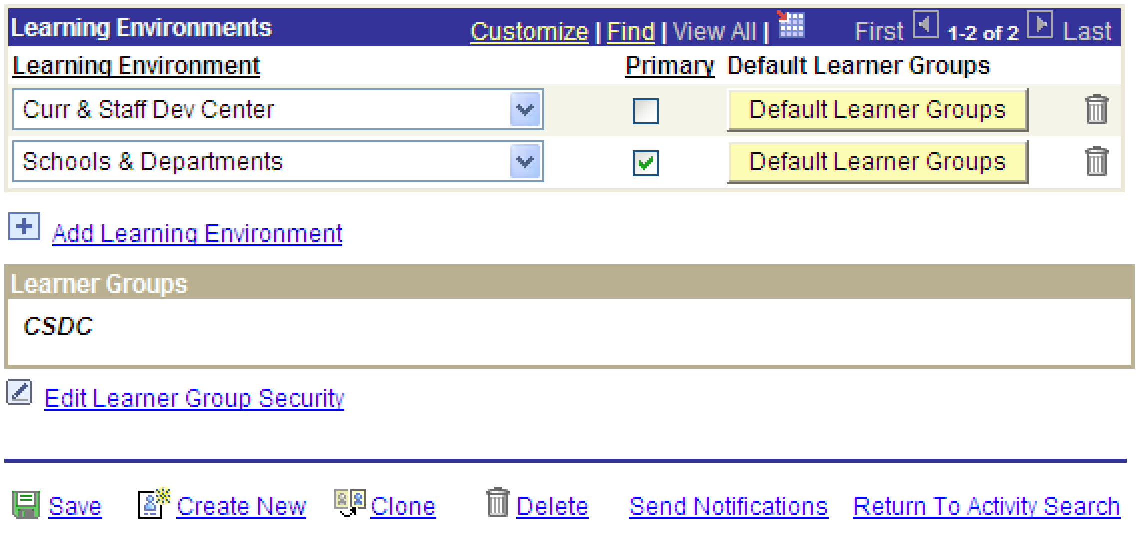
In order for courses to be sent for approval the Curriculum & Staff Development Center Learning Environment must be added.

- Click the **Add Learning Environment** link.
- Click the **Learning Environment** list.
- Click the **Curr & Staff Dev Center** list item.

The **Learner Groups** setting will also need to be configured to submit activities to CSDC for approval.

- Click the **Default Learner Groups** button next to the **Curr & Staff Dev Center** Learning Environment.
- The **Learner Groups** that were established at the Catalog Item level will populate this activity.
- Currently the functionality for school/department courses to accept enrollments is not available. Therefore, all Learner Groups *except for the CSDC Learner Group* must be deleted at this point.
- Click the **Edit Learner Group Security** link.
- Click the box next to each **Learner Group** *except* for CSDC.
- Click the **Delete** button.
- Click the **Done** button.

Below is a sample of what this section should look like when you are finished with the steps above:



Click the **Save** link.

A notice will appear that reads: This notice is a reminder that the course you are creating is still in draft mode and will not be submitted for approval until the Status is changed to Pending. We will complete that step a bit later. At this time click **OK**.

Click the **OK** button.

Creating Activities - Learning Components

A Session needs to be added to complete an activity and submit it for approval. This also provides information about dates and times.

Click the **Learning Components** tab.
Click the **Add Component** button.
Click the **Sessions** link.
Enter **Course Sessions** into the **Component Name** field.
Enter **CourseSess** into the **Short Name** field.
The **Description** field allows up to 256 characters. Enter the desired information into the **Description** field. (Example: "**Participants will attend three course sessions and one follow-up session**".)

Adding A Couple of Training Dates

- Click the **Sessions** tab.
- Click the **Add Session** button.
- The **Start Date** is defaulted from the **Activity Details** page. You can edit this date as appropriate
- Enter the **Facility** (location) by clicking the search icon and selecting the appropriate location from the list provided.

- Select the **Start Time** and **End Time**. This will default from the system default settings. The **Time Zone** is defaulted and should not be edited.
- Click **OK** button.
- Continue steps until all dates have been entered.
- Click **Return to Activity** link.

Adding Multiple Training Dates (optional)
Click the **Session Patterns** tab.

The **Session Patterns** page is displayed. If your activity will have multiple dates/times, this page will allow you to set up the course details and ELM will "build" the individual sessions within the guidelines you established. In this first example, we will use the Session Builder to establish the sessions.

Enter the **Facility** (location) by clicking the search icon and selecting the appropriate location from the list provided.

The **Start Date** is defaulted from the **Activity Details** page. You can edit this date as appropriate

Enter the desired information into the **Create** field.

Select the **Start Time** and **End Time**. This will default from the system default settings. The **Time Zone** is defaulted and should not be edited.

Select the checkbox(s) for the days of the week that the training will take place. For example if you want 10 sessions on Wednesday evening, you would enter 10 in the **Create** field, and click the Wednesday checkbox. In this example, there is only one session and it is on a Thursday.

Click the **Build Sessions** button.

The **Sessions** tab is now populated with the sessions as outlined on the Session Patterns tab. This information can be edited by clicking the date link and another date selected. Sessions can be deleted individually or by clicking the Select All option.

Creating Activities – Course Description

The course description for an activity is entered on the **Materials & Attachments** tab.

- Click the **Materials & Attachments** tab.
- Enter the appropriate course description in the **Notes** field.
- Use the "spell check" icon if applicable.

When all entry is complete, be sure to save your work.
- Click the **Save** button.

Creating Activities – Course Approval

- Click the **Activity Details** tab.

When all entry is complete and the course is ready to be submitted to CSDC for approval, change the Status to **Pending**.

- Click the **Status** list.
- Click the **Pending** list item.
- Click the **Save** link.

Editing Activities

- Begin by navigating to the **Activity Details** page. Click the **Enterprise Learning** link.
- Click the **Catalog** link.
- Click the **Maintain Activities** link.
- Enter your **Learner ID** in the **Activity Owner** field.
- Click the **Search** button.
- Select the appropriate activity by clicking on the **Course Title**.
- Edit as appropriate and click **Save**.

Cloning Activities

ELM provides functionality to clone (copy) courses similar to a template.

- Begin by navigating to the **Activity Details** page.Click the **Enterprise Learning** link.
- Click the **Catalog** link.
- Click the **Maintain Activities** link.
- Using the Search fields select the appropriate Activity to clone.
- Click the **Clone** link.
- The **Activity Cloning** page is displayed. Enter the **Activity Code**, **Start Date**, and **End Date** as applicable.
- Click the **Copy the Activity Session Information** option.
- Click the **Continue** button.
- Review the rest of the copied activity data as necessary, including the Learning Components and trainer information.
- Click the **Learning Components** tab.
- Use the **Edit** links for any of the Component Types to review and / or change the information.
- Click the **Activity Details** tab.
- Click the **Status** list.
- Click the **Pending** list item.
- Click the **Save** link.

Viewing Activity History

PDMS course data from 2003 – 2009 was converted into ELM for reference.

- Navigate to the **2003-2009 Course History** page.
- Click the **Enterprise Learning** link.
- Click the **Catalog** link.
- Click the **2003 - 2009 Course History** link.
- Use the search criteria to locate a specific course. The more criteria entered, the more narrow the search results.
- Enter the desired information into the **Location** field. This field is the four-digit school/department location (except for CSDC Coordinators where this location is their subject/area. Click the **Search** button.
- Enter the desired information into the **Fiscal Year** field. Click the **Search** button.
- Any of the search fields can be used to further refine the search.

For this process, you must use the **Back** arrow on your browser to return to the search results. For most other processes, you would use a **Return** button on the page. It is not a good habit to use the browser to return to a previous page as sometimes data can be lost. This process is an exception.

Notice the search results you entered - Location and Fiscal Year - are still displayed.

Once you enter search criteria, you can save the search and give it a name. Once saved, the search remains in the system for future use.

- Click the **Save Search Criteria** link.
- Enter the desired information into the **Name of Search:** field. Enter a valid value e.g. "**Fort Myers High FY09**".
- Click the **Save** button.

- Click the **Return to Advanced Search** link. Searches that you have created and saved in the past will remain in the system.
- Click the **Use Saved Search:** list to view previously saved searches.
- To display a specific saved search, click the appropriate line and then click the **Search** button.