

#### eLMS ADMINISTRATOR GUIDE

**Version 1.0**

**January 2010**

#### Basic Tasks for eLMS Administrators

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| Overview | This document contains directions to help administrators get started with tasks surrounding setting up and managing courses in eLMS, Clarian’s eLearning Management System.  This document covers the following topics:   **Create Scheduled Offerings**: Page 03  **Setting Registration Parameters**: Page 10  **Registering Users for a Scheduled Offering**: Page 12  **Canceling a Scheduled Offering**: Page 15  **Printing Rosters**: Page 17  **Complete Scheduled Offering Roster for Completion Status**: Page 21  **Editing Completion Status with the Learning Event Editor**: Page 24 |

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| Creating Scheduled Offerings | Need to add times and locations for your courses?  Follow the instructions below to create scheduled offerings on eLMS.  **Note**: The following instructions are for existing courses that have already been entered into eLMS—i.e. The Gift of Care giving, Cerner courses, etc. For completely new courses, you will need to contact the eLMS team to enter your course in the system. [elmssupportmail@clarian.org](mailto:elmssupportmail@clarian.org). |

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| Step | Action |
| 1. | From the **LMS Administration** home page, click the **Add New Scheduled Offering** link.  *The* ***Add New Scheduled Offering*** *page appears.* |
| 2. | In the *1. Select a Type* section, verify that **Item** is selected. |

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| Step | Action |
| 3. | In the *2. Identify the Scheduled Offering* section, select the appropriate **Item Type** from the drop-down menu (key below).   |  |  | | --- | --- | | **Item Type Key** | | | CERT | Certification Course | | CRSE | Instructor-led, Classroom-based Course | | DOC | Document | | MENT | Mentoring | | ONLINE | Web-based Training Course | | PREC | Preceptor Course | | PRESENT | Presentation | | READ | Read-Only Course | | SELFSTUDY | Self Study Course | | SEMINAR | Seminar | | TEST | Assessment | | VIDEO | Video Course or Presentation | | WRKSHP | Workshop | |
| 4. | Click the icon next to **Item ID**.  *The* ***Items*** *window appears.* |

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| Step | Action |
| 4. | Click the **Search** tab.  *The Search Items screen appears.* |
| 5. | Enter your search term in the **Item Title** field.  **Note**: You can change **Starts With** to **Contains** to have a more encompassing search. |
| 6. | Click **Search**.  **Note**: If your search term returns no results, your course may not be an existing offering. Contact the eLMS team at [elmssuportmail@clarian.org](mailto:elmssuportmail@clarian.org) to enter your new course into the system. |

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| Step | Action |
| 7. | Click **Select**.  *The* ***Add New Scheduled Offering*** *screen reappears with the* ***Item ID*** *field populated.* |
| 8. | Select the appropriate **Domain** (i.e. Public or Specific Audience-based access) from the drop-down menu. |
| 9. | Select the appropriate **Facility** (i.e. Methodist, Riley, etc.) from the drop-down menu. |
| 10. | In the **Set Up the Segment** section, click the calendar next to the **Start Date** field.  *A calendar appears.* |

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| Step | Action |
| 10. | Select the appropriate date for the course offering. |
| 11. | Enter the appropriate time in the Start Time field (*example*: 09:00 AM).  **Note**: Be sure to enter a space between number and AM/PM. Additionally, the system will not accept military time. |
| 12. | Ensure that the appropriate Time Zone is selected. |
| 13. | If entering an instructor-led course, in the **Select Resources** section, click the icon next to the **Primary Instructor** field.  *The* ***Instructors*** *screen appears.* |

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| Step | Action |
| 12. | Click the **Search** tab. |
| 13. | Enter the appropriate name in the **Last Name** field. |
| 14. | Click the **Search** button. |
| 15. | Click **Select** next to the appropriate name.  **Note**: If you instructor does not appear when you search, contact the eLMS team [elmssupportmail@clarian.org](mailto:elmssupportmail@clarian.org) to enter the instructor’s name into the system. |
| 16. | Enter a **Primary Location** and any needed **Equipment** in the corresponding fields. |

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| Step | Action |
| 17. | Click the **Next** button.  **Note**: If there are any discrepancies, the **Warning Details** screen will display. |
| 18. | Click the **Next** button again. |
| 19. | After reviewing the details, click the **Submit** button to add your course to eLMS.  **Note**: Record the **Scheduled Offering ID** displayed in the upper left of the Summary screen. This can be used to quickly access or search for the offering.  *The scheduled offering record is displayed, allowing you to make*  *further configurations if needed.* |

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| Setting Registration Parameters | Follow the instructions below to set registration parameters. |

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| Step | Action |
| 1. | From the eLMS home page, click the **Learning** link. |
| 2. | Click the **Scheduled Offerings** link. |
| 3. | Enter your search criteria/keywords in the field(s) in the **Search** section (you might need to scroll up to access the **Search** area).  **Note**: The quickest and most accurate way to search is to enter the **Scheduled Offering ID** number in the **Scheduled Offering ID** field. |
| 4. | Click **Search**.  *The Search results display.*  **Note**: If no search results display, you may need to change dates in the **Start Date After** and **Start Day Before** fields. |

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| Step | Action |
| 4. | Click the **Edit** icon next to the appropriate **Scheduled Offering**. |
| 5. | The systems automatically checks *Enable Users to Waitlist*. |
| 6. | Scroll to the bottom of the **Summary** tab. |
| 7. | Enter a **Registration Cut-off Date**. |
| 8. | Enter a **Registration Cut-off Time**. |
| 9. | Enter **Minimum** and **Maximum Registration** figures. |
| 10. | The systems automatically checks **Self Registration** checkbox. |
| 11. | Click to save and apply your changes. |

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| Registering Users for a Scheduled Offering | Follow the instructions below to register users for a Scheduled Offering. |

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| Step | Action |
| 1. | From the eLMS home page, click the **Learning** link. |
| 2. | Click the **Scheduled Offerings** link. |
| 3. | Enter your search criteria/keywords in the field(s) in the *Search* section (you might need to scroll up to access the Search area).  **Note**: The quickest and most accurate way to search is to enter the **Scheduled Offering ID** number in the **Scheduled Offering ID** field. |
| 4. | Click **Search**.  *The Search results display.* |

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| Step | Action |
| 5. | Click the **Edit** icon. |
| 6. | Click the **Registration** tab. |
| 7. | Click the **add one or more from list link**.  *The* ***User*** *screen appears.* |
| 8. | Click the **Search** tab. |
| 9. | Enter user search criteria in the appropriate fields.  **Note**: To enable search by **Lawson ID**, click the **Add/Remove Criteria** button and then check the **Lawson ID Number** box. Click the **Submit Query** button. |
| 10. | Click the **Search** button. |

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| Step | Action |
| 11. | Click the checkbox(es) next to **Email confirmations to:** to indicate which individuals should receive email confirmations. |
| 12. | Click the **Add** button for each user to be added to the Scheduled Offering.  *The user is added to the Scheduled Offering. Repeat to add multiple users to a class offering.* |

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| Canceling a Scheduled Offering | Follow the instructions below to cancel a Scheduled Offering. |

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| Step | Action |
| 1. | From the eLMS home page, click the **Learning** link. |
| 2. | Click the **Scheduled Offerings** link. |
| 3. | Enter your search criteria/keywords in the field(s) in the Search section (you might need to scroll up to access the Search area).  **Note**: The quickest and most accurate way to search is to enter the **Scheduled Offering ID** number in the **Scheduled Offering ID** field. |
| 4. | Click **Search**.  *The search results display.* |

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| Step | Action |
| 5. | Scroll down to the **Cancel the Scheduled Offering** link. |
| 6. | Click the **Cancel the Scheduled Offering** link. |
| 7. | Leave the default Cancellation Date and click . |
| 8. | Check the appropriate checkboxes to add registered users to the item request list, send email notifications, and/or inactivate the Scheduled Offering. |
| 9. | Click . |
| 10. | Click .  *The Scheduled Offering is canceled.* |

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| Printing Rosters | Follow the instructions below to print Roster for a Scheduled Offering. |

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| Step | Action |
| 1. | From the eLMS home page, click the **Reports** link.  *The* ***Reports*** *page appears.* |
| 2. | Enter roster in the **Search** field. |
| 3. | Under **Application**, check the box next to **Admin**. |
| 4. | Click . |
| 5. | Click the **Scheduled Offering Roster** link. |

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| Step | Action |
|  | Enter the **Scheduled Offering ID** number in the **Scheduled Offering** field.  **Note**: You can click the **List** icon to begin the process of searching for your **Scheduled Offering ID**. |
| 6. | Select the appropriate Scheduled Offering (if necessary, click the **Search Again** link) and click the **Submit Selection** button. |
| 7. | Click the **Submit Filter** button. |
| 8. | Click the **Run Report** button. |

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| Printing Rosters (continued) | |
| Step | Action |
| 9. | The Scheduled Offering Roster sheet displays. |
| 10. | Select **File** from your browser’s menu bar. Click **Print**. Complete the steps to print your roster. |

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| Complete Scheduled Offering Roster for Completion Status | Follow the instructions below to record completion of a course or any learning-related item, including scheduled offerings that are now complete. |

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| Step | Action |
| 1. | From the eLMS home page, click the **Record Learning** link.  *The* ***Record Learning*** *page appears.* |
| 2. | Click the **Scheduled Offering** button. |
| 3. | Enter the **Scheduled ID Offering** number in the **Scheduled Offering ID** field.  *The* ***Items*** *screen appears.*  **Note**: If you don’t have the **Scheduled Offering ID** number, you can begin the search process by clicking the Magnifying Glass icon. |

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| Complete Scheduled Offering Roster for Completion Status (continued) | |
| Step | Action |
| 4. | Click the button.  *The* ***Scheduled Offering*** *appears in the* ***Search and Add Offerings*** *section.* |
| 5. | Under the **Search & Add Users** section, click the clickthe next to the **User ID** field.  *The* ***User*** *screen appears.*  **Important Note**: Click on the **Auto Fill from Registration** button (pictured above) if your class is a Self-Registration class. Use the **Magnifying Glass** icon to add students not enrolled. For example: Classes not allowing self-registration would record learning for all students. |
| 6. | Click the **Search** tab. |
| 7. | Enter user’s **Last Name** and **First Name**.  **Note**: You can also search by **Lawson ID** number. |

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| Complete Scheduled Offering Roster for Completion Status (continued) | |
| Step | Action |
| 8. | Click the button.  *The* ***Search Results*** *screen appears.* |
| 9. | Select the appropriate item by clicking in the checkbox. |
| 10. | Select the appropriate user by clicking in the checkbox. |
| 11. | Click the button.  *The* ***Scheduled Offering*** *appears in the* ***Search and Add Offerings*** *section.*  **Note**: Repeat **Steps 8-13** for multiple users. |
| 12. | Click the **Next** button.  *The* ***Record Learning****screen appears.* |

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| Complete Scheduled Offering Roster for Completion Status (continued) | |
| Step | Action |
| 13. | Select the **Completion Status** from the drop down menu. |
| 14. | Enter any remaining information in the other non-required fields.  **Note**: If entering data for multiple users, click to make specific changes to individual users. Be sure to click **Apply Changes** for each individual user. |
| 15. | Click the **Apply Changes** button.  **Note**: You can view all enrolled participants by clicking on next to **Scheduled Offering ID** to make any changes before clicking the **Next** button. |
| 16. | Click the button. |
| 17. | Click the button.  *Completion status is entered for the specified users.* |

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| Editing Completion Status with the Learning Event Editor | Follow the instructions below to edit Completion Status for course participants using the **Learning Event Editor**. |

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| Step | Action |
| 1. | Click **User Management**.  *The* ***User Management*** *page appears.* |
| 2. | Click **Tools**. |

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| Editing Completion Status with the Learning Event Editor (continued) | |
| Step | Action |
| 4. | Click **Learning Event Editor**.  *The* ***Learning Event Editor*** *page opens.* |
| 5. | Click the arrow button next to **Add/Remove Criteria**. |
| 6. | Select **Schedules**. |

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| Editing Completion Status with the Learning Event Editor (continued) | |
| Step | Action |
| 7. | Click the button. |
| 8. | Enter search criteria such as Item **Description** and **Completed Dates** (**After** and **Before**). |
| 9. | Click the button. |
| 10. | Click the arrow for Completion Status drop-down menu. Select the new status. |
| 11. | Click the button.  *Your changes are applied.* |