

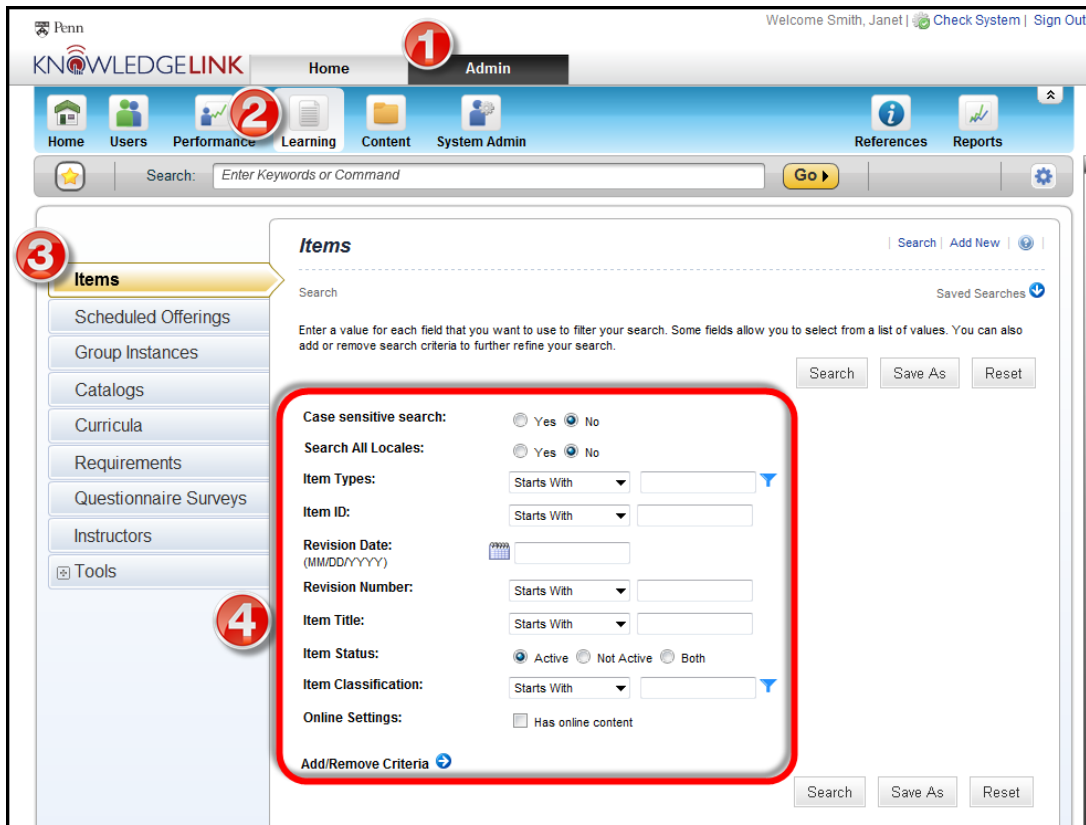
The purpose of this 'How To' is to guide administrators through the step-by-step process of configuring a new instructor-led item.

- A. Search for a new ILT item
- B. Roadmap of Configuration Details
- C. Add Segments (sets the default duration of the scheduled offering)
- D. Add the new item to the UNIV Catalog
- E. Add Prerequisites if needed
- F. Add subject areas to the new item (to help with searches)

## A. Search for a New Item

**PENN EXAMPLE:** You requested a new item/scheduled offering - "Species Specific Hands-on Training-Shark-ULAR" - to be created in KL. You received an email that the new offering is now available so you need to configure it.

Select in order (1) **Admin** tab, (2) **Learning** button, (3) **Items**, and the **Search** screen opens as the default (4).



**PENN EXAMPLE:** Since it's hard to remember the exact Item ID for searching, you can just use the 'Item Title' field with "contains" as the delimiter and the word "shark".

1. Enter most suitable search criteria for your purposes, here we used the word "shark" contained in the **Item Title (1)**.
2. Click **Search (2)** button.
3. Click on the results title of the item **(3)** you need to configure.

The screenshot shows a search interface with a left sidebar and a main search area. The sidebar has a menu with 'Items' selected. The main area has search filters and a search button. Red circles with numbers 1, 2, and 3 highlight the 'Item Title' field, the 'Search' button, and a search result respectively.

Search > Search Results Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search:  Yes  No

Search All Locales:  Yes  No

Item Types: Starts With [ ]

Item ID: Starts With [ ]

Revision Date: (MM/DD/YYYY) [ ]

Revision Number: Starts With [ ]

**1** Item Title: Contains shark

Item Status:  Active  Not Active  Both

Item Classification: Starts With [ ]

Online Settings:  Has online content

Add/Remove Criteria

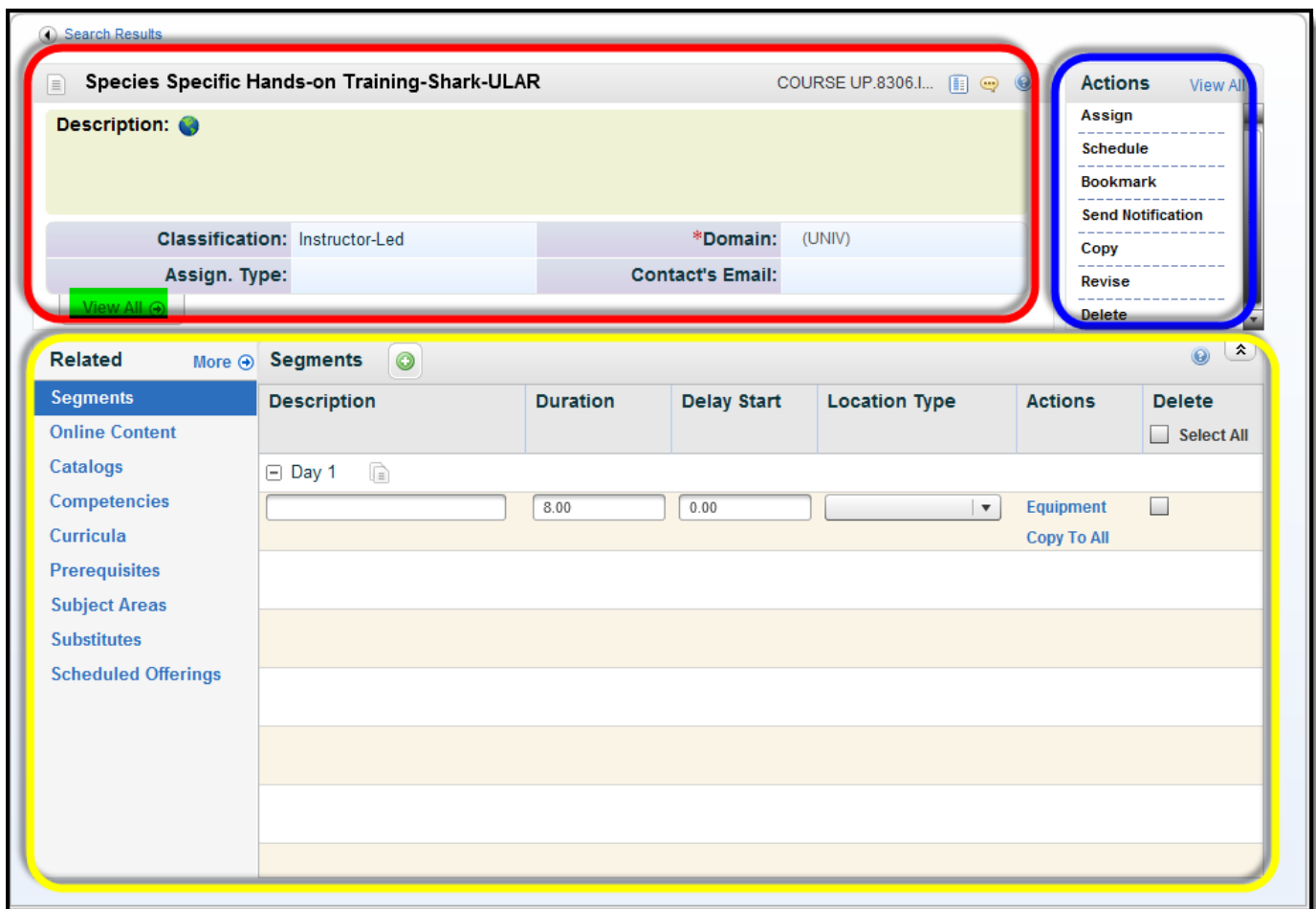
**2**

Field Chooser [Download Search Results](#)

Item	Title
<b>3</b> COURSE UP.8306.ITEM.S.SHOTSHA (Rev 1 - 8/16/2012 02:33 AM America/New York)	Species Specific Hands-on Training-Shark-ULAR

## B. Roadmap of Configuration Details

- The area outlined in **RED** is the **Core** and contains the item's basic information, some of which was filled in when the item was initially requested/created in Knowledge Link. You can add the item description now. This area can be expanded by clicking the **View All ->** link.
- The area outlined in **YELLOW** is the **Related** area, which contains various additional information.
- The area outlined in **BLUE** is the **Action** area and contains links to additional actions that can be taken on this particular item after the initial configuration is complete.



The screenshot shows the configuration page for an item titled "Species Specific Hands-on Training-Shark-ULAR". The interface is divided into three main sections highlighted with colored borders:

- Red Border (Core):** Contains the "Description" field, "Classification: Instructor-Led", "Assign. Type:", "\*Domain: (UNIV)", and "Contact's Email:". A "View All" link is visible at the bottom left of this section.
- Blue Border (Actions):** A vertical menu on the right side containing: Assign, Schedule, Bookmark, Send Notification, Copy, Revise, and Delete.
- Yellow Border (Related):** A table titled "Segments" with columns: Description, Duration, Delay Start, Location Type, Actions, and Delete. The first row shows "Day 1" with a duration of 8.00 and a delay start of 0.00. A "View All" link is also present at the top left of this section.

This is the expanded **Core** section - **Additional Settings** -- and the following information should be filled in. This section is very long but detailed so your possible questions will be answered.

1. **Title** (Inherited from the "New Item Title" field on the Item Request Form. This can be edited, but should generally be the same as was originally requested.)
2. **Description** (Location for more detailed text description of the Course. This info will be visible to and reference by the end-user when searching for courses in the CATALOG. Note: The LMS does not allow html to be embedded in the Description field. Links to course-specific training or reference material will need to be supplied elsewhere.)
3. **SUMMARY**
  - a. **Classification:** Inherited from the "Item Type" field on the Item Request Form and reflects whether an ITEM is Instructor-Led (ILT) or Web-Based (WBT). Note that the classification cannot be edited.
  - b. **Assignment Type:** This indicates whether the default for this ITEM is to be assigned as Optional or Required. Important notes:
    - i. Select "Required" if it will ever have to be required, including assignments by the Penn Profiler, or as part of a CURRICULUM.
    - ii. If a user self-enrolls, the assignment will be optional to them—even if the original ITEM Assignment Type is listed as Required..
  - c. **Domain:** This field will already be completed based on the original Item Request, and will almost always be UNIV. While the system will allow this field to be edited, do not update this field without prior discussion with the System Admin.
  - d. **Contact's email:** Inherited from the Provider Information "Your email" field on the Item Request Form. This can be edited, as needed. Note that several training providers have their own training support email address, which may be used in this field. This information will be available to end-users to help direct training support requests for specific courses to the correct training provider.
4. **EXTENDED SUMMARY**
  - a. **Approval Process:** Use of this field will allow workflow approval for course registrations (e.g. A course could require an Instructor's pre-approval for each registration). For future use—leave blank.
  - b. **Approval Required:** Turns specified Approval Process on or off. For future use—leave the default of "No".
  - c. **Active:** This field will already be completed based on the original Item Request, and will set to "Yes". Note: Inactive ITEMS will not be available to users in catalog or on To-Do list; will be available to admins if search for inactive (many migrated items are inactive, there for Learning History only).

- d. **Creation Date:** This field will already be completed based on the original Item Request. Note that this field cannot be edited.
- e. **Source:** A drop-down listing of the defined training providers in the LMS. Pre-populated based on information from the original Item Request.
- f. **Length:** Total time of the class in hours.
- g. **Max Registration:** Sets an upper limit on how many individuals can register for a Scheduled Offering. Note: Waitlist may be activated if limit is reached; admin can override. This will also depend on where the class is held.
- h. **Minimum Registration:** Sets a lower limit on how many individuals can register for a Scheduled Offering. (Administrative Only).
- i. **Self Registration:** Do users have to be assigned to this course or can they sign up themselves?
- j. **Delivery Method:** Choose "eLearning" for web-based training or "ILT" for Instructor-led Training. Other options are for future use only.
- k. **Legacy Course Master ID:** This field will be pre-populated as reference information for courses that were imported from the previous LMS. Otherwise, this field should be left blank.
- l. **Course Owner:** Inherited from the "Course Owner (Dept)" field on the Item Request Form. This can be edited, but should generally be the same as was originally requested.

## 5. DESIGN

- a. **Credit Hours:** In general, courses in the LMS are not "for credit", as a college course might be, and so this field would normally be left blank.
- b. **Contact Hours:** The expected duration of the course in hours. This value will be used by various training providers for reporting purposes in calculating total training offered over a given period.
- c. **CPE Hours:** This field represents Continuing Professional Education Hours awarded upon completion of the course, if any. Note that CPE Hours must be verified by an appropriate accreditation entity. If a course has not been accredited for CPE Hours, this field should be left blank.
- d. **Initial Basis:** For required courses, the initial basis determines the method of calculating the required course completion date. Possible values include 'Event' or 'Calendar', however only 'Event' should be used at this time. This will calculate available time for completion from the assignment date. May be left blank for courses not assigned as 'Required'. Do not pick 'Calendar'!
- e. **Initial Number:** This number determines the amount of time available for a course to be completed after the initial assignment is made, and uses increments as entered in the 'Initial Period' field. May be left blank for courses not assigned as 'Required'.
- f. **Initial Period:** Possible values include 'Days', 'Months', 'Quarters' or 'Weeks'. Due to the mechanics of how the LMS interprets this value, only 'Days' should be selected. May be

left blank for courses not assigned as 'Required'.

- g. **Retraining Basis:** The 'Retraining Basis' basis determines the method of calculating the required course completion date. Possible values include 'Event' or 'Calendar', however only 'Event' should be used at this time. This will calculate available time for completion from the assignment date.
- h. **Retraining Number:** This number determines the amount of time available for subsequent completions of a course, and uses increments as entered in the 'Retraining Period' field. May be left blank for courses that do not have a retraining requirement.
- i. **Retraining Period:** Possible values include 'Days', 'Months', 'Quarters' or 'Weeks'. Due to the mechanics of how the LMS interprets this value, only 'Days' should be selected. May be left blank for courses that do not have a retraining requirement.
- j. **Reviser:** Leave this blank!

## 6. PROCESS

- a. **Enable User Requests:** Selecting 'Yes' allows users to request additional Scheduled Offerings from the course provider. Default is 'No'.
- b. **Enable Users to Waitlist:** Selecting 'Yes' to allow a waitlist to be created for a fully registered course. Default is 'Yes'.
- c. **Supervisors can record Learning Events for Subordinates:** default is 'No'. **THIS SHOULD BE NO!**
- d. **Users can record Learning Events for themselves:** default is 'No'. **THIS SHOULD BE NO!**
- e. **Registration Threshold Days:** default is zero. This is the number of days before the scheduled offering that registration should be closed. For example, you need to order the correct number of sharks for the hands on lab 3 days in advance.

### Additional Settings ✕

\*Required Fields

#### Summary

<b>Classification:</b>	Instructor-Led	<b>*Domain:</b>	(UNIV)
<b>Assign. Type:</b>	Required (REQ)	<b>Contact's Email:</b>	sharklady@upenn.edu

#### Extended Summary

<b>Approval Process:</b>		<b>Approval Required:</b>	No
<b>Active:</b>	Yes	<b>Creation Date:</b>	8/16/2012
<b>Source:</b>	UNIV: University Lab Animal Re	<b>Length:</b>	2.00
<b>Max Registration:</b>	6	<b>Min Registration:</b>	4
<b>Self Registration:</b>	Yes	<b>Delivery Method:</b>	
<b>Legacy Course Master ID:</b>		<b>Course Owner:</b>	(UNIV:Univ Lab Animal Resour

#### Design

<b>Credit Hours:</b>	0.00	<b>Contact Hours:</b>	0.00
<b>CPE Hours:</b>	0.00	<b>Initial Basis:</b>	
<b>Initial Number:</b>	5	<b>Initial Period:</b>	
<b>Retraining Basis:</b>		<b>Retraining Number:</b>	0
<b>Retraining Period:</b>		<b>Reviser:</b>	

#### Process Control

<b>Enable User Requests:</b>	No	<b>Enable Users to Waitlist:</b>	Yes
<b>Supervisors can record Le...</b>	No	<b>User can record Learning E...</b>	No
<b>Registration Threshold Days:</b>	0		

Save
Cancel

## C. Add Segment to the New Item

A "segment" is a block of time within a scheduled offering, or in other words, the duration of the instructor-directed class. You will later create the individual scheduled offering but at this point you set the duration in general.

In the **Related** area, select **Segments (1)**.

Fill in the **Description, Duration, and Location Type (2)**.

If you have a course with multiple segments, for example, if you have a morning session and an afternoon session in the same day, you can use the "Delay Start" field (3). A **Delay Start** of 0.5 hrs would create a 30 minute break between the 2 segments on that day.

Add additional segments by clicking the plus sign (4).

Click **Save (5)**.

**TIP: Add all of your segments BEFORE adding the scheduled offerings so that each scheduled offering automatically contains all of your segments.**

The screenshot shows the 'Segments' configuration page. On the left, a 'Related' sidebar has 'Segments' selected (1). The main table lists segments with columns for Description, Duration, Delay Start, Location Type, Actions, and Delete. A red box highlights the first row (2). The 'Delay Start' field for the second row is set to 0.50 (3). A plus sign icon is visible (4). At the bottom right, the 'Save' button is highlighted (5). An 'Add New Segment' dialog box is also shown, mirroring the table structure.

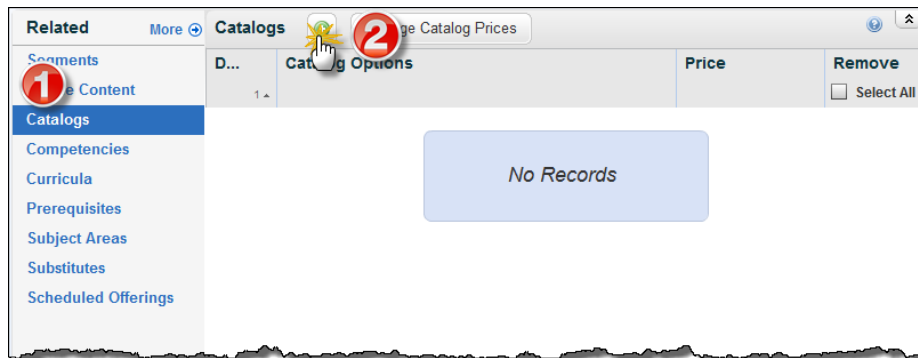
Description	Duration	Delay Start	Location Type	Actions	Delete
Day 1 Default duration of all hands-on shark scheduled offerings	2.00		Laboratory (LABO)	Equipment Copy To All	<input type="checkbox"/> Select All
Afternoon session	2.50	0.50	Laboratory (LABO)	Equipment Copy To All	<input type="checkbox"/>
Day 2 Follow up with computer simulation	2.00	0.00	Classroom with c	Equipment Copy To All	<input type="checkbox"/>



## D. Add New Item to the UNIV Catalog

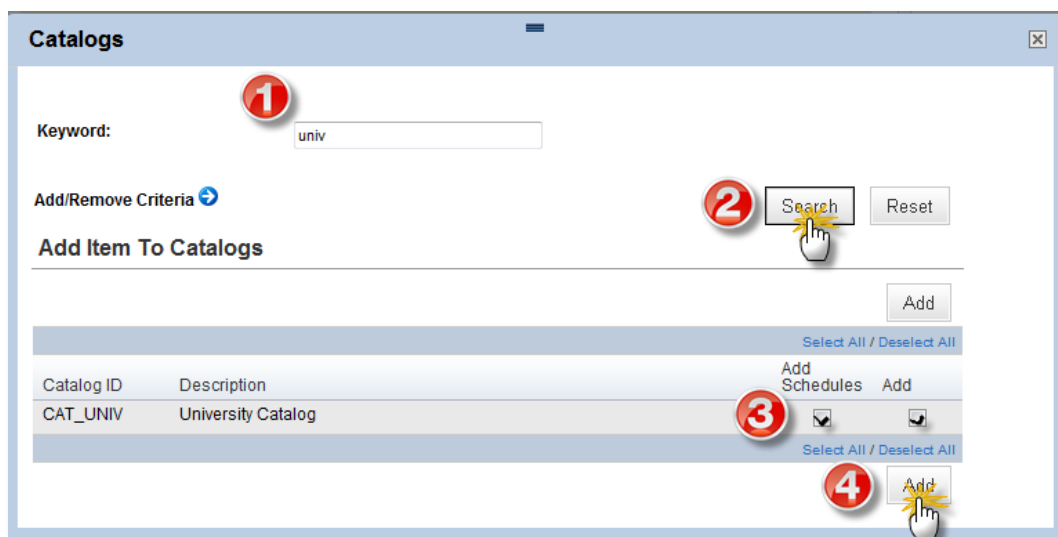
When items are in catalogs, it enables users with access to self-assign or enroll in the course.

1. In the "Related" section of the screen, click on **Catalogs** (1) in the left navigation bar and
2. Then click the small plus (2) to add the item to a catalog.



1. Enter a keyword (or add additional search criteria). We want to add this to the University catalog so we type "UNIV" (1).
2. Click **Search** (2).
3. Check **Add Schedules** checkbox (3) to allow users to self-register for future scheduled offerings of the item in the user interface and check **Add** to add the newly created item to the selected catalog.
4. Click the **Add** (4) button and return to the initial screen and then click **Save**.

**TIP: If the course needs to be available/visible to learners at the university as well as at the health system, assign it to both catalogs, UNIV and UPHS.**



## E. Add Prerequisites if needed

If there is a prerequisite course that must be taken prior to taking the new item you are working on, follow these instructions.

1. Select '**Prerequisites**' in the related section of the course.
2. Click the green plus sign to add a prerequisite for the new item.
3. Enter a **Keyword** to find the course, "**shark**" in this example.
4. Click **Search**.

Search Results

Species Specific Hands-on Training-Shark-ULAR COURSE UP.8306.ITEM.SSHOTSHA (Re... [View All](#)

Description: This is the second course in the Shark curriculum. Its pre-requisite is the web based course called "Shark Training Pre-Requsite-ULAR".

Classification: Instructor-Led \*Domain: (UNIV)  
Assign. Type: Required (REQ) Contact's Email: sharklady@upenn.edu

View All

Related [More](#) **Prerequisites** **2**

Segments  
Online Content  
Catalogs  
Competencies  
Curricula  
**Prerequisites**  
Subject Areas  
Substitutes

Title	Item	Remove
No Records		

Select All

Prerequisites

Keyword:  **3**

Add/Remove Criteria

**4** Search Reset

No Records

1. Click the 'Add' checkbox to select the course as a prerequisite for your new item.
2. Click the 'Add' button to actually add it.

**Prerequisites**

Keyword:

Add/Remove Criteria [+](#)

Add Item Prerequisites To Item

[Select All / Deselect All](#)

Item	Title	
COURSE UP.8306.ITEM.INTROSHARK (Rev 1 - 8/27/2012 05:35 PM America/New York)	Introduction to Shark Handling	<input checked="" type="checkbox"/>
COURSE UP.8306.ITEM.SSHOTSHA (Rev 1 - 8/16/2012 02:39 PM America/New York)	Species Specific Hands-on Training-Shark-ULAR	<input type="checkbox"/>

[Select All / Deselect All](#)

Search Results

**Species Specific Hands-on Training-Shark-ULAR** COURSE UP.8306.ITEM.SSHOTSHA (Re... [i](#) [c](#) [t](#)

**Description:**

This is the second course in the Shark curriculum. Its prerequisite is the course called "Introduction to Shark Handling".

**Classification:** Instructor-Led **\*Domain:** (UNIV)

**Assign. Type:** Required (REQ) **Contact's Email:** sharklady@upenn.edu

[View All](#)

**Related** [More](#) **Prerequisites**

Title	Item	Remove
Introduction to Shark Handling	COURSE UP.8306.ITEM.INTROSHARK (Rev...	<input type="checkbox"/> Select All

**Actions** [View All](#)

- Assign
- Schedule
- Bookmark
- Send Notification
- Copy
- Revise
- Delete

**Related** [More](#)

- Segments
- Online Content
- Catalogs
- Competencies
- Curricula
- Prerequisites**
- Subject Areas

## F. Add Subject Areas to the New Item

When Subject Areas are associated with items, users can more easily find them by searching those areas in the catalog.

1. In the "Related" section of the screen, click on **Subject Areas (1)** in the left navigation bar and
2. Then click the small plus (2) to add the **Subject Areas** to the item.

**Species Specific Hands-on Training-Shark-ULAR** COURSE UP.830...

**Description:** This is the second course in the Shark curriculum. Its pre-requisite is the web based course called "Shark Training Pre-Requisite-ULAR".

**Classification:** Instructor-Led      **\*Domain:** (UNIV)

**Assign. Type:** Required (REQ)      **Contact's Email:** sharklady@upenn.edu

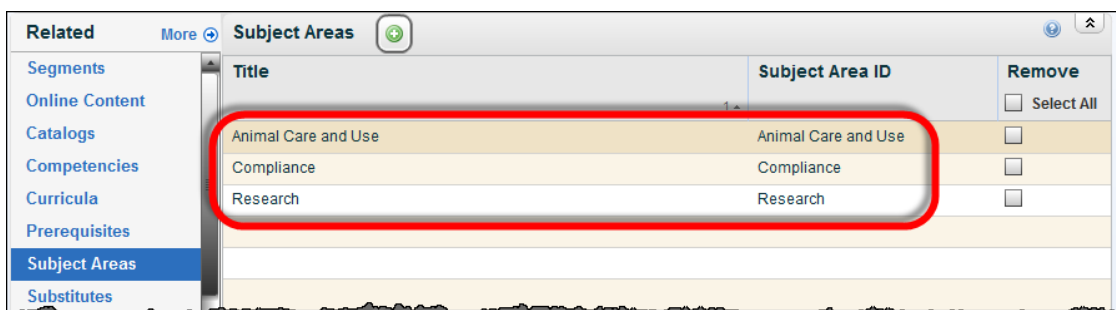
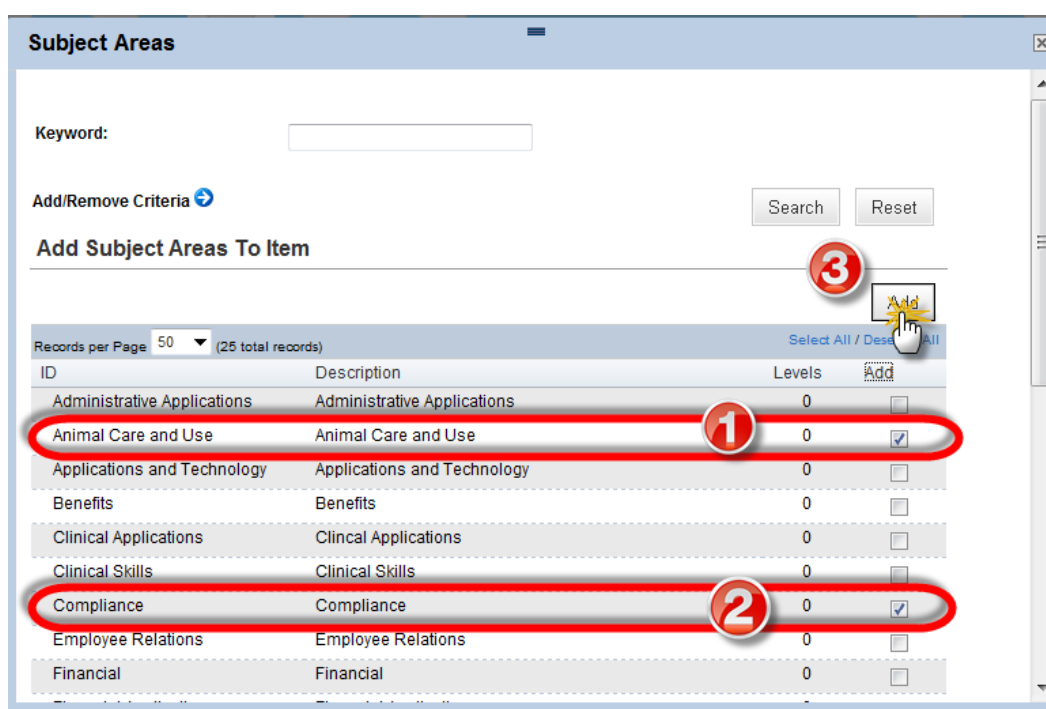
**Related** More

- Segments
- Online Content
- Catalogs
- Competencies
- 1 Curricula
- 2 Requisites
- Subject Areas
- Substitutes
- Scheduled Offerings

Title	Subject Area ID	Remove
No Records		

Penn has established a list of common subject areas for courses and these are listed in the dialog box that opens.

1. We want to check the boxes for 'Animal Care and Use' (1) as well as 'Compliance' (2) and 'Research' for our Penn example. (You need to scroll down or click to additional pages to see 'Research'.)
2. Click on the **Add** button (3).
3. Notice how the 3 areas appear.



*The next process is to create new scheduled offerings for the item and that is a separate How To.*