

# How to Give Credit for Completed Items & Scheduled Offerings

The purpose of this 'How To' is to guide administrators through the step-by-step process of manually giving users credit by using the **Learning Event Recorder** wizard. Related terminology is included.

- A. Record Completion of an Item
- B. Record Completion of a Scheduled Offering

TERMINOLOGY	
<b>Learning Event:</b>	A learning event is the record of: <ul style="list-style-type: none"><li>• A completed item</li><li>• An unsuccessful attempt to complete an item</li></ul>
<b>Item Based Events:</b>	Items are the primary events (courses, etc.) found in the list of learning events for users. Learning events for items include those created as scheduled offerings and those with online content where the system records the learning event when the user completes the content. All items may have a learning event recorded against them for any user, even if the item was not a part of his/her Learning Plan.
<b>Scheduled Offering:</b>	A scheduled offering is an item or activity scheduled for delivery on a specific date and time.

# How to Give Credit for Completed Items & Scheduled Offerings

## A. Record Completion of an Item

**PENN EXAMPLE:** A user emails saying that she has completed a web-based item but it does not show as completed in Knowledge Link. She includes a screen shot of the final slide with the successful completion message as proof of completion. The Admin needs to find the item and complete it which then gives the user credit.

Verify the **Admin** tab is selected.

Navigate to **Users (1) > Tools (2) > Record Learning - Multiple (3)**.

The screenshot shows the Knowledge Link Admin interface. At the top, there is a navigation bar with tabs for 'Home' and 'Admin'. Below this is a secondary navigation bar with icons for 'Home', 'Users', 'Performance', 'Learning', 'Content', 'System Admin', 'References', and 'Reports'. A search bar is located below the navigation bar. The main content area is titled 'Record Learning - Multiple' and includes a breadcrumb trail: 'Initial Information > Edit Details > Confirm'. A 'Next' button is visible in the top right corner of the main content area. The main content area contains the following text: 'This wizard is to record learning history for multiple users for one or more items, scheduled offerings or external events. Simply indicate the type of learning to record, select the related items, scheduled offerings or external event to be recorded for each, and specify the users for whom you want to record the learning history.' Below this text is a form with the following fields: 'What kind of learning you want to record?' with radio buttons for 'Item', 'Scheduled Offering', and 'External Event'; 'Search & Add Items' with a dropdown for 'Item Type ID' and a text input for 'Item ID' with an 'Add' button; 'Search & Add Users' with a text input for 'User ID' and an 'Add' button; 'List of Selected Items' with a message: 'There are no items in the list. Please add items before proceeding.'; and 'List of Selected Users' with a message: 'There are no Users in the list. Please add Users before proceeding.'

# How to Give Credit for Completed Items & Scheduled Offerings

**PENN EXAMPLE:** We're looking for a bird training course online for Janet Smith, Penn ID 10051662. Since the Item ID is hard to remember, we will use the Search icon (magnifying glass) and the word "bird" to find the item.

Select the **Item (1)** option.

In the **Search & Add Items** section, select the **Item Type ID (2) 'COURSE'** from the drop-down menu.

Click the **Search icon (3)**.

Enter **"bird" (4)** as a keyword and click **Search (5)**.

Check the box for **"Bird Training Online" (6)** and click **Add (7)**.

**Record Learning - Multiple**  
Initial Information > Edit Details > Confirm

This wizard is to record learning history for multiple users for one or more items, scheduled offerings or external event to be recorded for each, and specify the users for whom you want to record.

**1** What kind of learning you want to record?  
 Item  Scheduled Offering  External Event

**2** Search & Add Items  
Item Type ID: COURSE

**3** Item ID:  Add

Selected Items

There are no items in the list. Please add items before proceeding.

Items > Search - Windows Internet Explorer  
https://upenn-stage.plateau.com/learning/search/clickSearch.do?stackID=list

**Items**

Search

Search Items

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.

**4** Keyword: bird

**5** Search Reset

Add/Remove Criteria

Item	Title	
COURSE UP.83019.ITEM.SSHOTBE (Rev 8/7/2012 12:00 AM America/New York)	Species-Specific Hands-on Training-Bird-Exemption-ULAR	<input type="checkbox"/>
<b>COURSE UP.83019.ITEM.SSTPB (Rev 8/7/2012 12:00 AM America/New York)</b>	<b>Bird Training Online Module- ULAR</b>	<input checked="" type="checkbox"/>
COURSE UP.83019.ITEM.SSHOTBE (Rev 8/7/2012 12:00 AM America/New York)	Species-Specific Hands-on Training-Bird-Exemption-ULAR	<input type="checkbox"/>

Select All / Deselect All

**7** Add

# How to Give Credit for Completed Items & Scheduled Offerings

In the **Search & Add Users (1)** section, enter a **User ID (2)** exactly since we know it for this user. Otherwise we would search by last name. (User ID is the PENN ID number only without any domain appended to it.)  
Click **Add (3)**. Click **Next (4)**.

**Record Learning - Multiple**

Initial Information > Edit Details > Confirm

This wizard is to record learning history for multiple users for one or more items, scheduled offerings or external events. Simply indicate the type of learning to record, select the related items, scheduled offerings or external event to be recorded for each, and specify the users for whom you want to record the learning history.

What kind of learning you want to record?  
 Item  Scheduled Offering  External Event

Search & Add Items  
 Item Type ID: COURSE  
 Item ID:  Add

List of Selected Items

Item	Title	
COURSE UP.83019.ITEM.SSTPB (Rev '1' - 8/7/2012 12:00 AM America/New York)	Bird Training Online Module-ULAR	<a href="#">Remove</a>

**Search & Add Users**

User ID:

List of Selected Users

User ID	Name	
10051662	Smith, Janet C.	<a href="#">Remove</a>

Review and update the selections made on the previous page.

In the **Edit Details (1)** section, enter details for the item for each user:

- Completion date and time
- Grade and completion status
- Total hours, credit hours, contact hours, and CPE if needed

Click **Apply Changes (2)** to make the changes apply to all users. Click **Next (3)**.

**Record Learning - Multiple**

Initial Information > Edit Details > Confirm

Review and update the selections you made on the previous page. You may change details (such as Grade or Completion Status) for any specific record, or change the details for a group of records at once.

Edit Details  
 Group By: Item

\* = Required Fields

Item	Completion Date (MM/DD/YYYY)	Time (hh:mm AM/PM)	Time Zone	Grade / Completion	Total Hrs (1000)	Credit Hrs (1000)	Contact Hrs (1000)	CP
COURSE UP.83019.ITEM.SSTPB (Rev '1' - 8/7/2012 12:00 AM America/New York)	8/22/2012	01:52 PM	Eastern Standard Time (America/New York)	C				

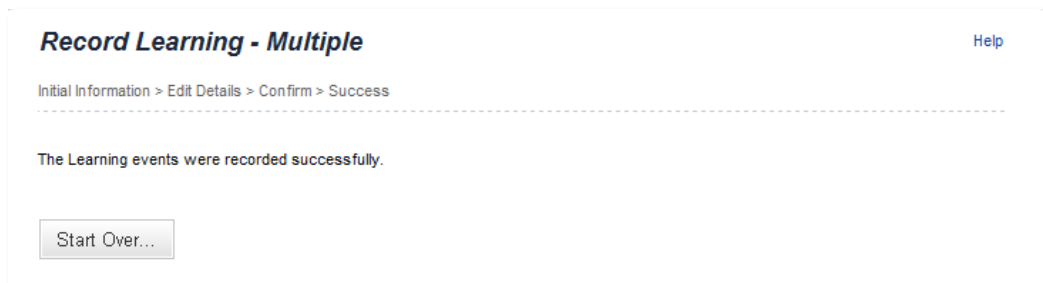
Apply Changes

Previous Next

## How to Give Credit for Completed Items & Scheduled Offerings

The application provides a status update dialog box to let you know that the learning event has been recorded successfully.

Click **Start Over...** to begin the process of giving a user credit by recording a completion again.



# How to Give Credit for Completed Items & Scheduled Offerings

## B. Record Completion of Scheduled Offering

**PENN EXAMPLE:** Diane Andrews calls and is concerned that her attendance at the species specific hand-on mouse training was not recorded and the protocol that she is working on will be held up. She has emailed a scan of the certificate of completion handed out at the meeting so the Admin has proof of completion. The Admin needs to find the correct scheduled offering and complete it. This is virtually the same procedure as above.

Verify the **Admin** tab is selected.

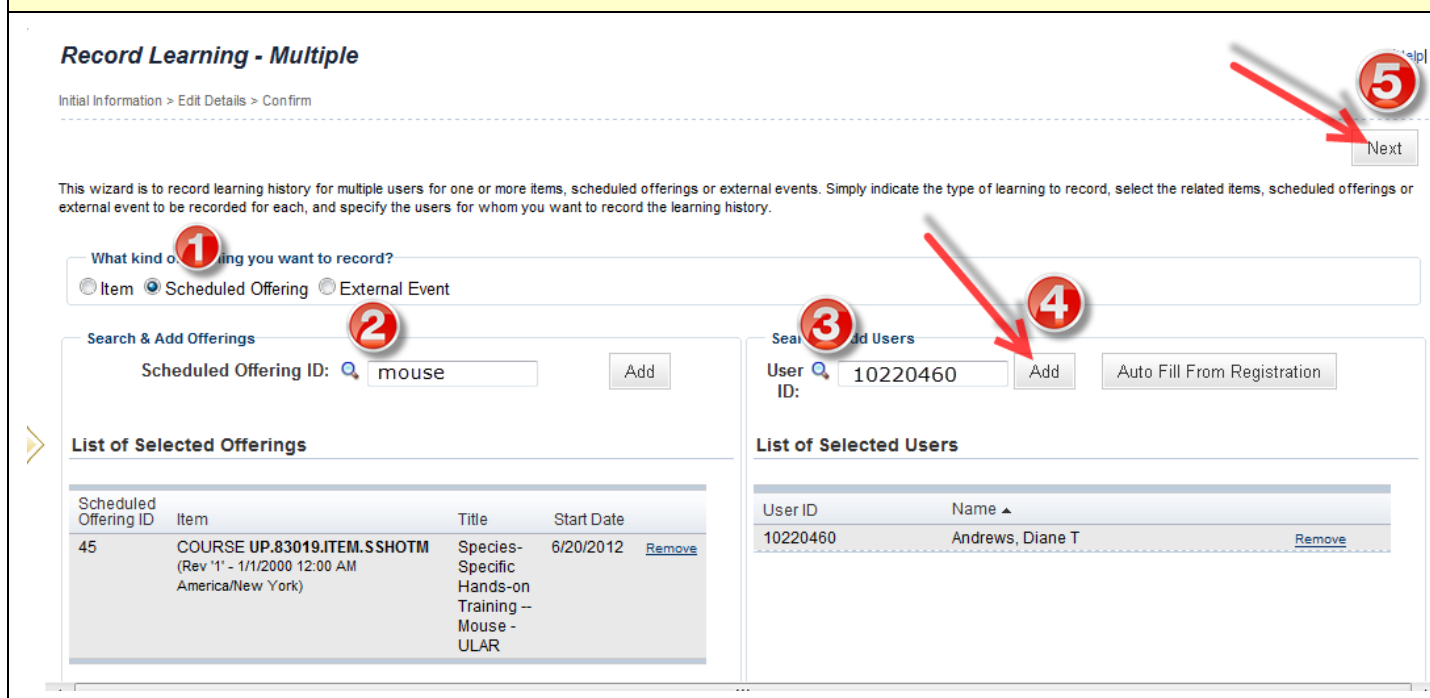
Navigate to **Users > Tools > Record Learning - Multiple**.

Select the **Scheduled Offering (1)** option.

In the **Search & Add Offerings** section, click the **Search (2)** icon to search for and select the correct mouse class/scheduled offering by entering the word "mouse" since you don't know the exact scheduled offering ID.

In the **Search & Add Users** section, enter a **User ID (3)** exactly if you know the Penn ID number of the person. Otherwise, use a name search. Click **Add (4)**

Click **Next (5)**



**Record Learning - Multiple**

Initial Information > Edit Details > Confirm

This wizard is to record learning history for multiple users for one or more items, scheduled offerings or external events. Simply indicate the type of learning to record, select the related items, scheduled offerings or external event to be recorded for each, and specify the users for whom you want to record the learning history.

What kind of **1** learning you want to record?

Item  Scheduled Offering  External Event

**Search & Add Offerings** **2**

Scheduled Offering ID:

**Search & Add Users** **3**

User ID:

**List of Selected Offerings**

Scheduled Offering ID	Item	Title	Start Date	
45	COURSE UP.83019.ITEM.S.SHOTM (Rev '1' - 1/1/2000 12:00 AM America/New York)	Species-Specific Hands-on Training -- Mouse - ULAR	6/20/2012	<a href="#">Remove</a>

**List of Selected Users**

User ID	Name	
10220460	Andrews, Diane T	<a href="#">Remove</a>

**5**

# How to Give Credit for Completed Items & Scheduled Offerings

Review and update the selections made on the previous page.

In the **Edit Details** section, enter details for the item for each user:

- Grade and completion status (1).
- Total hours, credit hours, contact hours, and CPE if needed.

Click **Apply Changes** (2) to make the changes apply to all users. Click **Next** (3).

**Record Learning - Multiple** [Help]

Initial Information > Edit Details > Confirm

Review and update the selections you made on the previous page. You may change details (such as **Grade** or **Completion Status**) for any specific record, or change the details for a group of records at once.

**Edit Details**

Group By: Item

\* = Required Fields

Item	Completion Date (MM/DD/YYYY)	Time (hh:mm AM/PM)	Time Zone	Grade / Completion	Total Hrs (1000)	Credit Hrs (1000)	Contact Hrs (1000)
COURSE UP.83019.ITEM.SSHOTM (Rev '1' - 8/7/2012 12:00 AM America/New York)	8/22/2012	02:24 PM	Eastern Standard Time (America/New York)	C			

Apply Changes

If competencies need to be assessed as a result of recording the learning event, select the **Automatically Assess Related Competencies** checkbox. Otherwise, click **Do Not Assess**. Review learning event information. Click **Submit** and a confirmation dialog box appear..

**Record Learning - Multiple** [Help]

Initial Information > Edit Details > Confirm

Previous Submit

Review the summary of the learning history to be recorded by the system. If you are satisfied with the summary, click Submit to record the learning history. Use the option button to indicate the way competencies are assessed by the system when recording the learning history: **Assess based on the Item Settings**, **Assess all items**, or **Do not assess** which will have the system ignore the competencies.

**Change the way competencies are assessed**

Assess based on item setting  Assess all items  Do Not Assess

Scheduled Offering ID: 45

Item: COURSE UP.83019.ITEM.SSHOTM (Rev '1' - 1/1/2000 12:00 AM America/New York)

Title: Species-Specific Hands-on Training -- Mouse - ULAR

User ID	User Name	Grade / Completion	Completion Date	Total Hours	Credit Hours	Contact Hours	CPE	Comments
10220460	Andrews, C / Diane T	C / COURSE-COMplete	6/20/2012 03:00 PM America/New York	2.00	2.00	2.00	2.00	The new species of mouse was great for this lab.

# How to Give Credit for Completed Items & Scheduled Offerings

Click **Start Over** to begin the process again if you have other users that need credit and courses completed.

## *Record Learning - Multiple*

[Help](#)

[Initial Information](#) > [Edit Details](#) > [Confirm](#) > [Success](#)

The Learning events were recorded successfully.