



PeopleFluent Learning

Team Review Guide

An overview of the features and procedures relevant to
Team Review in PeopleFluent Learning 23.03

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About Team Review

Team Review involves three related areas of LMS functionality, which may be carried out by the direct appraiser, a supervisor or a reviewer: reviews, approvals and assessments. They are typically accessed through the Workspace menu. Team review features include:

- Learner reviews
- The Career Development Center
- Supervisor assessments
- Enrollment reviews
- The integrated user calendar
- Approval of:
 - Tasks
 - Enrollments
 - Enrollment withdrawals
 - External training
 - Certifications
- Enrollment via the Enrollment Wizard
- Compliance analytics

Reviewers can include learners' direct appraisers, managers or any specific LMS users with the appropriate user visibility and System Role feature permissions.

Additional Information

[About Reviewing Learners](#)

[About the Career Development Center](#)

[About Supervisor Assessments](#)

[About Reviewing Enrollments](#)

[About the Integrated User Calendar](#)

[About Task Approval](#)

[About Enrollment Approval](#)

[About Withdrawal Approval](#)

[About External Training Approval](#)

[About Certification Approval](#)

[About the Enrollment Wizard](#)

[About Compliance Analytics](#)

About Task Approval

When a learner launches a task learning module, it can be marked as completed by one or more designated users specified in the task's sign-off options. You can also delegate task approval to another user.

Administrators with read-only access to the *Task Approval* feature in System Roles (Review Features > Review Features) can delegate approval, launch the course, and access resource references. Only administrators with unrestricted access can additionally approve task completion.

For each task, you can also:

- Launch the task
- Open a list of the task's reference resources

To review tasks for approval, go to **Home > Workspace > Task Approval**.

Additional Information

[Review Tasks Pending Approval](#)

Review Tasks Pending Approval

You can review tasks pending approval in the Task Approval page.

Administrators with read-only access to the *Task Approval* feature in System Roles (Review Features > Review Features) can delegate approval, launch the course, and access resource references. Only administrators with unrestricted access can additionally approve task completion.

To review tasks for approval

1. Go to **Home > Workspace > Task Approval**. The Task Approval page opens with a list of tasks for which you match the sign-off selection criteria.
2. Select one of the following actions from the task's action menu:
 - Approve Task
 - Delegate
 - Launch Course
 - Reference Resources

Additional Information

[About Task Approval](#)

About Enrollment Approval

Enrollment approval is required for courses with an enrollment policy that includes one or more approval steps. The policy's *Approver Selection Type* specifies who can approve or deny each step of the enrollment in the Enrollment Approval page, therefore you can approve or deny an enrollment approval step for learners only if you match the approver selection specified for an approval step.

When learners enroll in a course that requires enrollment approval, they send a request to the designated approver on enrollment. They must then wait until the enrollment is approved before they can launch the course or access its knowledge center. This is also the case for auto-enrollment unless the *Ignore Prerequisites and Enrollment Approval Steps for Automatic Enrollments* System Configuration setting is enabled.

On the Enrollment Approval page you can:

- Filter the list of approvals to show:
 - Your pending approvals
 - Your approval history
 - All pending approvals
 - All approval history
- Print the list of approvals
- Approve enrollments individually
- Deny enrollments individually
- Pay tokens to approve enrollments
- Buy additional tokens
- Delegate approval authority to other users
- View the status of each approval step for an enrollment
- Open the course details for pending or approved enrollments
- See the user profile summary for users in the list
- Open the users' Career Summary in the Career Development Center

Administrators with at least read-only access to the *Enrollment Approval* feature in System Roles (Review Features > Review Features) can approve or deny enrollments.

To approve or deny enrollments, go to **Home > Workspace > Enrollment Approval**.

Additional Information

[Approve or Deny Enrollments](#)

[Delegate Enrollment Approval](#)

[About the Career Development Center](#)

Approve or Deny Enrollments

You can approve or deny enrollments for courses with enrollment policies that include at least one approval step for which you match the *Approver Selection Type* (for example, you are the learner's direct appraiser).

For enrollment policies with more than one approval step, the designated approver for each step must approve the enrollment for the learner to be enrolled in the course. If any approval step is denied, the learner will not be enrolled.

Where there is only one approval step, approving an enrollment also enrolls the learner in the course.

Click an approval's **Step Status** link to open the Enrollment Status page, where you can view the status of each approval step for the enrollment.

Administrators with at least read-only access to the *Enrollment Approval* feature in System Roles (Review Features > Review Features) can approve or deny enrollments.

To approve or deny enrollments

1. Go to **Home > Workspace > Enrollment Approval**. The Enrollment Approval page opens with a list of your pending approvals. Enrollments for courses with an online payment display an *Add to cart* button.
2. Filter the list of approvals, if required. You can select the owner and status, period of the request date, the learners' organizations, and enter keywords related to the course. Click **Filter**.
3. To deny an enrollment step, click **Deny**. The approval step is removed from the list.
4. To approve an enrollment step for a course with no charge, click **Approve**. The approval step is removed from the list.
5. To approve an enrollment step for a course with an online payment charge, click **Add to cart**.
6. To pay for an enrollment added to the cart, click **Proceed to shopping cart**. The Shopping Cart page opens with a list of course enrollments you have added to the cart.
7. Click **Checkout**. The external online payment gateway configured for your LMS opens, where you can pay for the enrollments.

Additional Information

[About Enrollment Approval](#)

[Delegate Enrollment Approval](#)

Delegate Enrollment Approval

You can delegate enrollment approval to other users for a period of time. Users you delegate approval to can approve or deny enrollment approvals assigned to you by the enrollment policy.

Administrators with at least read-only access to the *Enrollment Approval* feature in System Roles (Review Features > Review Features) can delegate enrollment approval.

To delegate enrollment approval

1. Go to **Home > Workspace > Enrollment Approval**. The Enrollment Approval page opens with a list of your pending approvals.
2. Click the **Click here to delegate approval authority to other users** text. The Delegation page opens with a list of users you have delegated approval authority to for the specified period.
3. Click **Add new entry**.
4. Enter or browse for a user to delegate approval authority to.
5. Select the start and end dates for the period they can approve or deny enrollments on your behalf.
6. Click **Save**. The user is added to the list on the Delegation page.
7. Repeat steps 3 to 6 to add new delegates.

Additional Information

[About Enrollment Approval](#)

[Approve or Deny Enrollments](#)

About Withdrawal Approval

Withdrawal approval is required for courses that have an assigned enrollment policy that requires withdrawal approval. Learners can request withdrawal from approved enrollments, self-enrolled courses, and their pending enrollments.

The enrollment policy's *Approver Selection Type* for its withdrawal policy specifies who can approve or deny the withdrawal request. Unlike enrollment approval, you cannot delegate withdrawal approval to other users.

You approve or deny withdrawal requests in the Withdrawal Approval page, where you can:

- Filter the list of approvals to show:
 - Your pending approvals
 - Your approval history
 - All pending approvals
 - All approval history
- Print the list of approvals
- Approve withdrawals individually with an optional comment
- Deny withdrawals individually with an optional comment
- Open the users' Learning Center Summary in the Career Development Center
- Open the course details for pending or approved enrollments

Administrators with at least read-only access to the *Withdrawal Approval* feature in System Roles (Review Features > Review Features) can approve or deny withdrawals.

To approve or deny withdrawals, go to **Home > Workspace > Withdrawal Approval**.

Additional Information

[Approve or Deny Withdrawals](#)

[About Enrollment Approval](#)

Approve or Deny Withdrawals

You can approve or deny withdrawals for courses with enrollment policies that have an assigned enrollment policy that requires withdrawal approval and for which you match the *Approver Selection Type* (for example, you are the learner's direct appraiser).

Administrators with at least read-only access to the *Withdrawal Approval* feature in System Roles (Review Features > Review Features) can approve or deny withdrawals.

To approve or deny withdrawals

1. Go to **Home > Workspace > Withdrawal Approval**. The Withdrawal Approval page opens with a list of your pending approvals.
2. Filter the list of approvals, if required. You can select the owner and status, period of the request date, the learners' organizations, and enter keywords related to the course. Click **Filter**.
3. To deny a withdrawal, click **Deny**. The withdrawal approval is removed from the list and the learner is not withdrawn from the course.
4. To approve a withdrawal, click **Approve**. The withdrawal approval is removed from the list and the learner is withdrawn from the course.

Additional Information

[About Withdrawal Approval](#)

About External Training Approval

Learners can take training courses administered outside of the LMS and create external training records for them, which you can approve—editing them if required—or deny. You can approve external training records for learners for whom you are their appraiser or super-appraiser, and for learners in organizations that you supervise, if you are the organizational external training approver.

System administrators can select the following email templates in System Configuration, which will be used to notify reviewers and learners:

- External training record approval request (sent to the reviewer)
- External training record approved email (sent to the learner)
- External training record approval denied email (sent to the learner)

You can approve external training in several places in the LMS, depending on your system role permissions:

- **Home > Workflow > External Training Approval**
- **Home > Workflow > Review > Learning Review**
- **Manage Center > Learning > External Training Records CSV Loader**

The External Training Approval page is the most direct way to review, approve or deny external training approval requests. In the Learning Review page in the Career Development Center, you can also create, edit and delete external training records in addition to approving or denying them.

Administrators with unrestricted access to the *Ext. Training Approval* feature in System Roles (Review Features > Review Features) can approve and deny external training records in the External Training Approval page and Career Development Center.

To approve external training for anyone in your organizational view, you also must have the *Is Organizational External Training Approver* role access control permission (in Data Access Control > Role General Permissions).

Administrators with unrestricted access to the *External Training Records CSV Loader* feature in System Roles (Manage Features > Catalog Manager Features) can create, update and delete external training records via the External Training Records CSV Loader.

To approve or deny external training in the External Training Approval page, go to **Home > Workspace > External Training Approval**.

Additional Information

[Approve or Deny External Training](#)

[Review External Training Record in the Career Development Center](#)

Approve or Deny External Training

You can approve external training records for learners for whom you are their appraiser, and for learners in organizations that you supervise, if you are their organizational external training approver. If the corresponding external training record email template is configured and selected in System Configuration, it is sent to the learner when external training records are approved or denied.

Administrators with unrestricted access to the *Ext. Training Approval* feature in System Roles (Review Features > Review Features) can approve or deny external training.

To approve external training for anyone in your organizational view, you also must have the *Is Organizational External Training Approver* role access control permission (in Data Access Control > Role General Permissions).

To approve or deny external training

1. Go to **Home > Workspace > External Training Approval**. The External Training Approval page opens with a list of external training approval requests.
2. Click the name of a participant. Their external training approval request opens.
3. Update the information in their external training record, if required.
4. Select one of the following options from the *Status* drop-down list:
 - To approve the external training, select **Approved**.
 - To deny the external training, select **Approval Denied**.
5. Click **Update** to save the changes or **Delete** to delete the external training record.

Additional Information

[About External Training Approval](#)

[External Training Records Field Reference](#)

External Training Records Field Reference

Use the table below to help you create or update an external training record, either for yourself or learners you review. You can create external training records for learners in their Learning Center in the Career Development Center. You review and update external training approval requests for learners on the External Training Approval page.

Table: External Training Records Field Reference

Field	Description	Mandatory
Title	Enter the title of the external course, up to 255 characters.	Y
Course Type	Select a course type from the drop-down list.	N
Subject	Select a subject from the drop-down list if any of those defined in the LMS match the subject matter of the external course.	N
Start Date	Select the start date of the external course.	Y
End Date	Select the end date of the external course or click Autofill to select the same date as the start date.	Y
Venue	Enter the external course's training venue.	N
Language	Select the language in which the training was provided.	N
Duration	Enter the duration of the training. You enter the duration in: <ul style="list-style-type: none"> • Minutes • Hours • Days • Weeks • Months 	N
Course Cost	Enter the course cost and select the currency.	N
Grade	Enter the final grade if one was awarded.	N
Score	Enter the score if one was awarded.	N
Vendor Information	Enter any information about the external training provider.	N
Comments	Enter any comments about the external training.	N
Attachment	To attach a file to the external training record, click Choose File .	N

Status	Select the status of the external training record from the drop-down list: <ul style="list-style-type: none">• Pending Approval• Approved• Approval Denied	Y
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Additional Information

[About External Training Approval](#)

[Approve or Deny External Training](#)

[Review External Training Record in the Career Development Center](#)

About Certification Approval

Learners can create self-awarded certifications which you, as their direct appraiser, can either approve or deny. If a certification approval request is no longer valid, you can update its status to Cancelled and, optionally, delete the request. Cancelled certifications are still shown in the Certifications Review page while deleted certifications are not. When you approve a certification, the certification details are shown in the following pages:

- **Home > Learning Center > Certifications Awarded**
- **Home > Review > Career Development Center > Learning Center > Certifications**
- **Manage Center > Learning > Certifications Review**

It can also be included in the LMS's certifications processes:

- Notification and automatic re-enrollment for expiring certifications
- Reporting functionalities associated with certifications awarded
- The certificationsAwarded API

Learners can self-award only the certifications for which they have been given read-only access permission.

Administrators with unrestricted access to the *Certification Approval* feature in System Roles (Review Features > Review Features) can approve, deny, cancel and delete self-awarded certifications pending approval.

To review self-awarded certifications pending approval, go to **Home > Workspace > Certification Approval**.

Self-awarded certifications can also be approved or denied via the Awarded Certificates CSV Loader.

Additional Information

[Review Certifications Pending Approval](#)

Review Certifications Pending Approval

You can review pending certification approvals for learners for whom you are their direct appraiser.

Administrators with unrestricted access to the *Certification Approval* feature in System Roles (Review Features > Review Features) can approve, deny, cancel and delete self-awarded certifications pending approval.

To review pending certification approvals

1. Go to **Home > Workspace > Certification Approval**. The Certification Approval page opens with a list of your direct appraisees with pending approvals.
2. Click a participant's name. The Self-award Certification Approval page opens.
3. Select one of the following options from the Status drop-down list:
 - Approved
 - Approval Denied
 - Cancelled
4. To save the certification's new status, click **Update**. Alternatively, to delete the learner's certification entirely, click **Delete**.

Additional Information

[About Certification Approval](#)

About Reviewing Learners

You can review learners' training and career related information in the Review page and Career Development Center (CDC).

Reviewers could include learners' direct appraisers, managers or any specific LMS users with the appropriate user visibility and System Role feature permissions.

Learners are categorized into three tabs in the Review page:

- Direct Appraiser Review lists the learners who are your direct appraisees
- Assigned Group Review lists the learners who are members of users groups you supervise
- Organization View lists all learners who are visible to you across all organizations

You can filter the list of learners in each tab by:

- Organization
- Job title
- First name
- Last name
- Date of their competency profile

Depending on your System Role permissions, you can:

- Review status of learners' job profiles, competencies, and training
- Review Learners' Employee Profiles in the CDC
- Review Learners' Learning Centers in the CDC
- Review Learners' Career Centers in the CDC
- Review learners' enrollments, either individually or in bulk
- Award a competency to an individual learner or in bulk to multiple learners
- Assign a learning module to a learner
- View the enrollment request history for one or more learners

Reviewers with read-only or unrestricted access to the *Review Menu* feature in System Roles (Review Features > Review Features) can access the Review page. To access the Organization review tab, reviewers must also have read-only or unrestricted access to the *Organization Review* feature.

Reviewers with read-only access to the *Review Submenu* features in System Roles (Review Features > Review Submenu Features) can view learners' training and career related information in the CDC. Unrestricted access to these features is required to update learners' records in the CDC.

To review learners, go to **Home > Workspace > Review**.

Additional Information

[About Job Profile, Competency and Training Statuses](#)

[About the Career Development Center](#)

[Review Employee Profile in the Career Development Center](#)

[Review Learning Center in the Career Development Center](#)

[Review Career Center in the Career Development Center](#)

[About Reviewing Enrollments](#)

[Award a Competency to Learners](#)

[Assign a Learning Module to a Learner](#)

[View Enrollment Requests History](#)

About Job Profile, Competency and Training Statuses

You can view learners' job profile, competency and training statuses in each of the tabs in the Review page. The statuses are indicated by one of three icons:

-  Complete indicator
-  Incomplete indicator
-  Grace period indicator

The grace period icon is shown if a learner is within a reminder period to retake a course before it expires.

The table below describes the meaning of each indicator for job profiles, competencies and learning modules.

Table: Review Page Indicator Reference

	 Complete indicator	 Incomplete indicator	 Grace period indicator
Job Profile	Indicates all the required competencies have been awarded.	Indicates all the required competencies have not been awarded.	If all the required competencies are awarded but one of the required competencies is in the grace period, the job profile will be indicated as being in the grace period.
Competency	Indicates all the required modules have been completed.	Indicates not all the required modules have been completed.	If all the required modules are completed but one of the required modules has a new revision released, the competency will be indicated as being in the grace period.
Learning Module	Indicates the learning module has been completed.	Indicates the learning module has not been completed.	If the new released revision of the learning module is not completed, the learning module will be indicated as being in the grace period.

Use the *Competency Profile as of* filter to view the competency statuses for a specific date.

To view the status of a job profile's competencies and learning modules for a learner, go to **Home > Workspace > Review**.

Reviewers with read-only or unrestricted access to the *Review Menu* feature in System Roles (Review Features > Review Features) can access the Review page.

Additional Information

[View Job Profile, Competency and Training Statuses](#)

[About Reviewing Learners](#)

View Job Profile, Competency and Training Statuses

You can view learners' job profile, competency and training statuses in each of the tabs in the Review page.

Reviewers with read-only or unrestricted access to the *Review Menu* feature in System Roles (Review Features > Review Features) can access the Review page.

To view the status of a job profile's competencies and learning modules for a learner

1. Go to **Home > Workspace > Review**.
2. Click in the row in the Review page. It expands to show the job profiles assigned to the learner.
3. Click a job profile name. It expands to show the required competencies, if any.
4. Click a competency name. It expands to show the optional and mandatory learning modules required to achieve the competency.

Additional Information

[About Job Profile, Competency and Training Statuses](#)

[About Reviewing Learners](#)

About Reviewing Enrollments

You can view learners' enrollments and transcript details, send learners emails and select sessions for learners in the Review Enrollment page. This page lists the learners' names, learning modules and their enrollment status. You can then drill down to the details page for each enrollment. From the enrollment details page you can view the learner's launch history and open the course details page, from which you can enroll the learner or open the Enrollment Wizard for additional enrollment processing options.

Reviewers with read-only or unrestricted access to the *Review Enrollment* feature in System Roles (Review Features > Review Features) can review enrollments.

Reviewers with unrestricted access to the *Assign Module* feature in System Roles (Review Features > Review Submenu Features) can assign learning modules to learners.

Reviewers with unrestricted access to the *Enroll Other Users* and *Enrollment Wizard* features in System Roles (Review Features > Review Features) can enroll multiple learners in a learning module.

To review enrollments, go to **Home > Workspace > Review Enrollment** or **Home > Workspace > Review** and select **Review Enrollments** from a learner's action menu or the Bulk Actions drop-down list (for more than one selected learner).

Additional Information

[Review Enrollments](#)

[About the Enrollment Wizard](#)

[Transcript Detail Visibility](#)

Review Enrollments

You can view specified learners' enrollments and transcript details, send learners emails and select sessions for learners in the Review Enrollment page.

Reviewers with read-only or unrestricted access to the *Review Enrollment* feature in System Roles (Review Features > Review Features) can review enrollments.

Reviewers with unrestricted access to the *Assign Module* feature in System Roles (Review Features > Review Submenu Features) can assign learning modules to learners.

Reviewers with unrestricted access to the *Enroll Other Users* and *Enrollment Wizard* features in System Roles (Review Features > Review Features) can enroll multiple learners in a learning module.

To review enrollments

1. Go to **Home > Workspace > Review Enrollment** or **Home > Workspace > Review** and select **Review Enrollments** from a learner's action menu or the Bulk Actions drop-down list (for more than one selected learner). The Review Enrollment page opens with a list of learners' enrollments.
2. Filter the list of enrollments, if required.
3. To select a session for an enrollment, click **Session Selection Needed**. The Session Selection dialog opens where you can select a session.
4. To send an email to one or more learners in the list, select their check box and then select **Send Mail** from the Bulk Action drop-down list. An email form opens in a new window.
5. To view a learner's transcript for an enrollment, click their name in the list. The transcript opens in a new page.
6. To open the course details page for the selected enrollment, click the name of the course at the top of the transcript page. The course's Enrollment page opens for the learner.
7. To enroll the learner in the course, click **Assign to User**.
8. To enroll other learners via the Enrollment Wizard, click **Enroll Other Users**.

Additional Information

[About the Enrollment Wizard](#)

[Transcript Detail Visibility](#)

Award a Competency to Learners

Reviewers with unrestricted access to the *Competencies* feature in System Roles (Review Features > Review Submenu Features) can award competencies to learners in the Review page.

For more information about competencies, see the PeopleFluent Learning HR Administration Guide.

To award a competency to learners in the Review page

1. Go to **Home > Workspace > Review**. The Review page opens.
2. Filter the list of learners, if required, and select **Assign competency** from the learner's action menu. To award a competency to multiple learners at once, select their check boxes and then select **Assign competency** from the Bulk Action drop-down list. The Award Competencies page opens with a list of all competencies from all competency models that you have at least read-only access to.
3. Select a competency model from the Competency Model list to filter the list of competencies.
4. Click the **Select** icon in the Select column to select the competency to award. The Select Level drop-down list is enabled.
5. Click the **Select Level** drop-down list. The Select Level dialog opens.
6. Select the proficiency level of the competency to award. The Select Level dialog closes.
7. Click **Save**. The competency is awarded to the learner.
8. Click **Back** to return to the Review page.

Additional Information

[About Reviewing Learners](#)

Assign a Learning Module to a Learner

Reviewers with unrestricted access to the *Assign Module* feature in System Roles (Review Features > Review Submenu Features) can assign learning modules to learners from the Review page.

Reviewers with unrestricted access to the *Enroll Other Users* and *Enrollment Wizard* features in System Roles (Review Features > Review Features) can enroll multiple learners in a learning module by opening the Enrollment Wizard from the course details page. See step 5, below. For more information about the enrolling multiple learners via the Enrollment Wizard, see [About the Enrollment Wizard](#).

To assign a learning module to a learner in the Review page

1. Go to **Home > Workspace > Review**. The Review page opens.
2. Filter the list of learners, if required, and select **Assign module** from the learner's action menu. The Learning Modules search page opens.
3. Search for the learning module you want to assign to the learner.
4. Click **Details** for the learning module in the search results. The course details page opens.
5. Click **Assign to User**. The Enrollment Confirmation page opens, where you may need to enter additional enrollment information, such as a preferred date. Alternatively, click **Enroll Other Users** to open the Enrollment Wizard, where you can enroll multiple learners in the learning module.
6. Click **Confirm enrollment**. The learner is enrolled in the course.

Additional Information

[About Reviewing Learners](#)

[About the Enrollment Wizard](#)

View Enrollment Requests History

Reviewers with read-only access to the *Review Enrollment Requests* feature in System Roles (Review Features > Review Submenu Features) can view a history of enrollment requests for the selected learners in the Review page.

To view the enrollment requests history for learners

1. Go to **Home > Workspace > Review**. The Review page opens.
2. Filter the list of learners, if required, and select the check boxes of the learners whose enrollment requests you want to review.
3. Select **Enrollment Requests History** from the Bulk Action drop-down list. The Enrollment Requests History page opens with a list of enrollment requests for the selected users.
4. To filter the list of requests by a particular status, select a status from the Overall Status drop-down list. The list of requests is updated.

Additional Information

[About Reviewing Learners](#)

[About Reviewing Enrollments](#)

About the Career Development Center

The Career Development Center (CDC) provides a consolidated view of learners' employment, learning, compliance and career related information. It is available to reviewers (for example, managers, supervisors, human resource administrators) via the Review page, and to learners via their profile page and the options in the Learning Center and Career Center menus.

Reviewers with the appropriate feature access permissions in System Roles and access to learners can:

- Review and update employees profile information
- Review and edit information related to a learner's training
- Review and edit learners' job profiles, competencies and training gaps
- Upload and share files with learners

This information is grouped into the following sections:

- Employee Profile
- Learning Center
- Career Center

The sections visible to you in each depend on your System Role permissions (in Review Features > Review Submenu Features).

Employee Profile

The Employee Information page includes the following sections:

- Profile Summary
- Employment Information
- Contact Details
- Education History
- Work History
- Language Skills
- Relocation Interests
- Resumé
- Other Information
- User Attribute Extensions
- Recent Activity

Learning Center

The Learning Center includes the following pages:

- Summary
- Learning
- Enrollment Requests
- Certifications
- Training Plan
- Learning Path
- Progress Tracker
- Learning Group
- Learning Reports
- Accounts
- SCORM Global Objectives

Career Center

The Career Center includes the following pages:

- Summary
- Job Profiles
- Competencies
- Training Gap Analysis
- My Files

Additional Information

[Review Employee Profile in the Career Development Center](#)

[Review Learning Center in the Career Development Center](#)

[Review Career Center in the Career Development Center](#)

Review Employee Profile in the Career Development Center

Depending on your System Role access permissions, you can view, edit and print to PDF learners' employee information in the Career Development Center (CDC).

Reviewers with read-only access to the *Employment Information* and corresponding features in System Roles (Review Features > Review Submenu Features) can view those sections in the Employee Information page in the CDC.

Reviewers with unrestricted access can edit the information in each section. In the Profile Summary section, you can:

- Download the employee's vcard
- Upload employees picture
- Configure the viewing constraints

To review a learner's employee profile in the CDC

1. Go to **Home > Workspace > Review** and select **Review Employee Profile** from the learner's action menu. The CDC opens in a new window at the Employment Information page.
2. To add or edit information, click the corresponding **Add** and **Edit** links, or action menu.
3. To upload a resumé, click **Upload**.
4. To print the employee information to a PDF, click **Print to PDF**.
5. To view the course details for recent activity, click the name of the course.

Additional Information

[About the Career Development Center](#)

Review Learning Center in the Career Development Center

The Learning Center in the Career Development Center (CDC) comprises a number of pages in which you can view and edit information related to a learner's training, plus a summary page highlighting their certifications, competencies, training plan and learning groups. On the Summary page you can:

- Open competency training details in the Career Center
- Download certificates for awarded certifications
- View the course details for learning modules in the learner's training plan
- View the personal profiles of people in the learner's learning group

The pages and information visible to you depend on your System Role access permissions. Reviewers with read-only access to the *Learning Center Summary* and corresponding features in System Roles (Review Features > Review Submenu Features) can view those sections in the Learning Center in the CDC.

To review a learner in the Learning Center

1. Go to **Home > Workspace > Review** and select **Review Learning Center** from the learner's action menu. The CDC opens in a new window at the Learning Center's Summary page.
2. Click on a competency, certification, learning module or learning group member for more information about each.
3. To view more information related to the learner's training, click an item in the Learning Center menu on the left.

Additional Information

[About the Career Development Center](#)

[Review Enrollments in the Career Development Center](#)

[Review Records/Transcripts in the Career Development Center](#)

[Review External Training Record in the Career Development Center](#)

[Review Enrollment Requests in the Career Development Center](#)

[Review Certifications in the Career Development Center](#)

[Review Training Plans in the Career Development Center](#)

[Review Learning Paths in the Career Development Center](#)

[Review the Progress Tracker in the Career Development Center](#)

[Review Learning Groups in the Career Development Center](#)

[Run Learning Reports from the Career Development Center](#)

[Review Accounts in the Career Development Center](#)

[Review SCORM Global Objectives in the Career Development Center](#)

Review Enrollments in the Career Development Center

You can review a learner's current course enrollments, learning records and external training records in the Learning page of the Career Development Center (CDC). This information is presented in three tabs on the Learning page.

You may also be able to:

- Drill down to transcript details and course history pages
- Withdraw enrollments
- Transfer a learner's enrollment to another session
- Enroll the learner in additional courses
- Create external training records

Reviewers with read-only access to the *Review Records/Transcript*, *Review Transcript History* and *Review External Training History* features in System Roles (Review Features > Review Submenu Features) can view the Records/Transcript tab, course launch history, and external training records in the CDC respectively. Unrestricted access is required to make changes. For more information about the System Role access permissions required to view the Learning page and make changes, see Review Submenu Features Access Permissions.

To review a learner's enrollments in the CDC

1. Go to **Home > Workspace > Review** and select **Review Learning Center** from the learner's action menu. The CDC opens in a new window at the Learning Center's Summary page.
2. Click **Learning**. The Learning page opens at the Enrolled Courses tab.
3. To filter the enrollments, enter the filter criteria and click **Filter**.
4. To view enrollment details, click the name of the enrollment.
5. To view or edit the learner's transcript for an enrollment, click the **Records/Transcript** link under the enrollment.
6. To withdraw the learner's enrollment in a course, click **Withdraw**.
7. To transfer a learner's enrollment to another session, click **Session Transfer** and select a session from the dialog.

Additional Information

[Review Records/Transcripts in the Career Development Center](#)

[Review External Training Record in the Career Development Center](#)

[About the Career Development Center](#)

[Review Learning Center in the Career Development Center](#)

Review Records/Transcripts in the Career Development Center

You can review a learner's learning records (also called transcripts) in the Learning page of the Career Development Center (CDC). Depending on your System Role access permissions, you may also update the learner's transcripts, enroll other learners in a course, and view the course's transcript history.

Reviewers with read-only access to the *Review Records/Transcript* and *Review Transcript History* features in System Roles (Review Features > Review Submenu Features) can view records/transcripts in the CDC. Unrestricted access is required to make changes to transcript data, such as the performance grade.

Reviewers with the *Assign Module* feature in System Roles (Review Features > Review Submenu Features) can assign modules to the learner in the CDC.

The *Enable Transcript History* System Configuration setting must be enabled to view changes to the transcript.

To review records/transcripts in the CDC

1. Go to **Home > Workspace > Review** and select **Review Learning Center** from the learner's action menu. The CDC opens in a new window at the Learning Center's Summary page.
2. Click **Learning**. The Learning page opens at the Enrolled Courses tab.
3. Click **Records/Transcript**. The Records/Transcript tab lists the learner's courses.
4. To view or edit a transcript, click its name in the list. The transcript details open in a new window, where you can also view the transcript history, if enabled.
5. To print the transcript details for a course, select **Print Transcript** from the course's action menu.
6. To assign a course to the learner, click **+ Assign learning module**. A learning module search page opens where you can search for a course, view its details and assign it to the learner or enroll other users.
7. To print the list of courses, with their status, start and end dates, and score, click **Print**.

Additional Information

[Review Enrollments in the Career Development Center](#)

[Review External Training Record in the Career Development Center](#)

[About the Career Development Center](#)

[Review Learning Center in the Career Development Center](#)

Review External Training Record in the Career Development Center

When you review learners' external training records in the Career Development Center (CDC) you can update the training details, and approve or deny external training records pending approval. You can edit external training records for learners for whom you are their appraiser or super-appraiser, and for learners in organizations that you supervise, if you are the organizational external training approver.

If the corresponding external training record email template is configured and selected in System Configuration, it is sent to the learner when external training records are approved or denied.

Administrators with unrestricted access to the *Ext. Training Approval* feature in System Roles (Review Features > Review Features) can create, edit, delete, approve and deny external training in the CDC.

To approve external training for anyone in your organizational view, you also must have the *Is Organizational External Training Approver* role access control permission (in Data Access Control > Role General Permissions).

To review an external training record in the CDC

1. Go to **Home > Workspace > Review**. The Review page > Direct Appraiser Review tab opens with a list of learners for whom you are their appraiser.
2. Optionally, click **Assigned group review** or **Organization review** to list learners by assigned user groups or organizations you supervise respectively.
3. Filter the list of learners, if required.
4. Select **Review Learning Center** from the action menu of the learner you want to edit the external training record for. The CDC opens at the Summary page.
5. Click **Learning**. The Learning page > Enrolled Courses tab opens.
6. Click **External Training Records**. The tab lists all of the learner's external training records.
7. Filter the list of external training records, if required.
8. Click the Learning Program/Module name of the external training record you want to edit.
9. Update the information in the external training record, if required.
10. Select one of the following options from the *Status* drop-down list:
 - To approve the external training, select **Approved**.
 - To deny the external training, select **Approval Denied**.
 - To revert a previously approved or denied record for reconsideration, select **Pending Approval**.
11. Click **Update** to save the changes or **Delete** to delete the external training record.

Additional Information

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[About Reviewing Learners](#)

[Review Enrollments in the Career Development Center](#)

[Review Records/Transcripts in the Career Development Center](#)

Review Enrollment Requests in the Career Development Center

You can review learner's enrollment requests, both current and previous, in the Enrollment Requests page in the Career Development Center (CDC). You can filter the list of approvals by status, view details for the approval step, and open the enrollment details for the course, where you may also enroll other learners.

Reviewers with read-only access to the *Review Enrollment Requests* feature in System Roles (Review Features > Review Submenu Features) can view enrollment requests in the CDC. Unrestricted access is required to open the enrollment details.

To review enrollment requests in the CDC

1. Go to **Home > Workspace > Review** and select **Review Learning Center** from the learner's action menu. The CDC opens in a new window at the Learning Center's Summary page.
2. Click **Enrollment Requests**.
3. To filter the list of enrollment requests by status, select a status from the Overall Status drop-down list.
4. To view the details of a approval request, click the final status. The Enrollment Status page opens in a new window.
5. To view the enrollment details for the course, click the name of the course. The enrollment details page opens in a new window.

Additional Information

[About Enrollment Approval](#)

[About the Career Development Center](#)

[Review Learning Center in the Career Development Center](#)

Review Certifications in the Career Development Center

You can review learners' current, expired and pending certifications, and award certifications in the Career Development Center (CDC). You cannot approve or deny approval for certifications in the CDC, only in the Certifications Approval page. You can also delete learners' self-awarded certifications.

Reviewers with read-only access to the *Review Certifications* features in System Roles (Review Features > Review Submenu Features) can view learners' current, expired and pending certifications. Unrestricted access is required to award certifications and delete self-awarded certifications in the CDC.

To review certifications in the CDC

1. Go to **Home > Workspace > Review** and select **Review Learning Center** from the learner's action menu. The CDC opens in a new window at the Learning Center's Summary page.
2. Click **Certifications**. The Certifications page opens at the Certifications tab.
3. To filter the certifications list, select an option from the Status drop-down list.
4. Select an action from the certification's action menu. You can view the certification's details, print the associated PDF certificate , and delete self-awarded certifications.
5. To award a certification to the learner, click **+ Award New Certification**.
6. To view the learner's certifications pending approval, click **Certifications for Approval**. You can filter the list by the status of approval.

Additional Information

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[Delete an Awarded Certification in the Career Development Center](#)

[About Certification Approval](#)

[About the Career Development Center](#)

[Review Learning Center in the Career Development Center](#)

Award a Certification in the Career Development Center

You can award certifications to users individually in the Career Development Center (CDC). When you award a certification, you can add a comment and enter values for any certificate award attributes for which you have at least read-only access permission. You can specify the certification's Issue Date as being the current date, or any time in the future or past. Changing the Issue Date can affect date-dependent automated processes configured in the Expiration/Renewal Policy properties for the certification, such as setting the expiry date as a specific number of days after the certification is issued.

Reviewers with unrestricted access to the *Review Certifications* feature in System Roles (Review Features > Review Submenu Features) can award certifications in the CDC.

To award a certification in the CDC

1. Go to **Home > Workspace > Review**. The Review page opens with a list of all learners for whom you are their direct appraiser.
2. Select **Review Learning Center** from the action menu of the learner you want to award a certification to. The Learning Center Summary page opens in the CDC.
3. Select **Certifications** from the Learning Center menu. The Certifications page opens with a list of the learner's current certifications.
4. Click **+ Award New Certification**. The Add Certification page opens.
5. Click the **Certification** link to open the Select certification page, where you can select the certification to award the learner.
6. Select the certification and click **OK** to return to the Add Certification page.
7. Update the Issue Date from today's date, if required.
8. Add a comment, if required.
9. Complete any certificate award attributes, as required.
10. Click **Award Certification**. The certification is added to the list in the Certifications page.

Additional Information

[Delete an Awarded Certification in the Career Development Center](#)

Delete an Awarded Certification in the Career Development Center

Reviewers with unrestricted access to the *Review Certifications* feature in System Roles (Review Features > Review Submenu Features) can delete self-awarded certifications in the Career Development Center (CDC).

To delete an awarded certification in the CDC

1. Go to **Home > Workspace > Review**. The Review page opens with a list of all learners for whom you are their direct appraiser.
2. Select **Review Learning Center** from the action menu of the learner you want to delete the awarded certification from. The Learning Center Summary page opens in the CDC.
3. Select **Certifications** from the Learning Center menu. The Certifications page opens with a list of the learner's current certifications.
4. Select **Delete** from the action menu of the certification you want to delete.
5. Click **OK** in the confirmation dialog.

Additional Information

[Award a Certification in the Career Development Center](#)

Review Training Plans in the Career Development Center

You can review and edit learners' training plans in the Career Development Center (CDC). A training plan consists of one or more courses suggested by the learner's manager or appraiser.

Reviewers with read-only access to the *Training Plan* feature in System Roles (Review Features > Review Submenu Features) can view learners' training plans. Unrestricted access is required to edit the suggested courses in the plan or add new entries (course suggestions) to the plan.

To review a learner's training plan

1. Go to **Home > Workspace > Review** and select **Review Learning Center** from the learner's action menu. The CDC opens in a new window at the Learning Center's Summary page.
2. Click **Training Plan**. The Training Plan page opens with a list of suggested courses in the plan (if any).
3. Select an option from a suggested course's action menu. You can edit the suggestion details or delete it from the training plan, subject to your system role permissions.
4. To view the course details for a suggested course, click the learning module/program name. The course details open in a new window.
5. To add a new suggested course to the training plan, click **+ Create Entry**. The page refreshes with a blank course suggestion form. Saved suggestions are added to the end of the training plan list.

Additional Information

[Create a Training Plan Entry in the Career Development Center](#)

[About the Career Development Center](#)

[Review Learning Center in the Career Development Center](#)

Create a Training Plan Entry in the Career Development Center

Training plans consist of a list of suggested courses in the Training Plan page of the Career Development Center (CDC). You can add new courses to the list, remove courses and edit them. The courses in the Training Plan page are listed in the order in which they were added.

Reviewers with unrestricted access to the *Training Plan* feature in System Roles (Review Features > Review Submenu Features) can create training plans for learners in the CDC.

To create an entry in a training plan in the CDC

1. Go to **Home > Workspace > Review** and select **Review Learning Center** from the learner's action menu. The CDC opens in a new window at the Learning Center's Summary page.
2. Click **Training Plan**. The Training Plan page opens with a list of suggested courses in the plan (if any).
3. To add a new suggested course to the training plan, click **+ Create Entry**. The page refreshes with a blank course suggestion form.
4. Click the **browse** icon to select a course to add to the list in the training plan. The Selector opens in a new window.
5. Add a comment for the learner, if required.
6. Select a priority (high, medium or low) from the list to indicate to the learner how important the course is compared to others in the list.
7. Click the **calendar** icon to specify the date by which the learner should complete the course.
8. Click **Save suggestions** to add the suggested course to the list.

Additional Information

[Review Training Plans in the Career Development Center](#)

[About the Career Development Center](#)

Review Learning Paths in the Career Development Center

The Learning Path provides a graphical representation of learners' training, assigned via their training plan or as part of their job profile. Each item is represented by a card and cards are arranged in a hierarchical structure to represent:

- Training plan > learning programs > courses
- Job profiles > competencies > learning programs > courses

Completed substitute courses that fulfill a training requirement are also shown.

You can expand and collapse each level of the hierarchy to view more or fewer cards on screen at once. You can also click and drag the whole canvas to focus on different areas if the learning path is larger than the viewable area on screen.

Each card shows the name of the job profile, competency or course, along with its status and due date, if specified. You can move the pointer over a card to see whether it is a job profile, competency or course. When you hover the pointer over a course card, a pop-up link appears from which you can open a summary of the course. view the course details in the catalog, and enroll the learner in it. Job profile and competency cards always display a Summary link which opens a dialog from which you can drill down to more details.

Titles and descriptions for completed courses are shown in the language in which the learner took the course. For multi-language courses the learner has not enrolled in, this information is shown in the learner's preferred language or the course's primary language.

Reviewers with read-only access to the *Learning Path* feature in System Roles (Review Features > Review Submenu Features) can review learning paths in the Career Development Center (CDC).

To review a learner's learning path in the CDC

1. Go to **Home > Workspace > Review** and select **Review Learning Center** from the learner's action menu. The CDC opens in a new window at the Learning Center's Summary page.
2. Click **Learning Path**. The Learning Path page opens.
3. Click the **Summary** links on job profile and competencies cards to open a summary dialog.
4. Move the pointer over a course card and click the **Summary** link to open a summary dialog for the course.
5. Move the pointer over a course card and click the **Enroll and launch** link to enroll the learner in the course. You can also enroll learners from the summary dialog.

Additional Information

[About the Career Development Center](#)

[Review Learning Center in the Career Development Center](#)

Review the Progress Tracker in the Career Development Center

The Progress Tracker shows a learner's progress on a calendar using three statuses:

- Completed is shown for programs and courses (or their substitutes) that have been completed.
- Behind is shown if a program or course has a deadline that has passed.
- On Target is shown if a course or program is not completed or behind schedule.

The Progress Tracker lists all of the learner's assigned courses, including top level programs and their modules, and shows their status. The calendar, by default, shows one calendar year of information with the current month centered. Information such as the course's enrollment date, completion date, program or module due date are also displayed. More information about course or program deadlines is available by clicking the Deadline Details link.

You can filter the courses to show only those without a *Completed* transcript status or all courses. You can sort the list of programs and courses by status or deadline.

You can create and send emails to learners from the Progress Tracker.

Reviewers with read-only access to the *Transcript History* feature in System Roles (Learner-Oriented Features > Learn Features) can review the Progress Tracker in the Career Development Center (CDC).

To review a learner's Progress Tracker in the CDC

1. Go to **Home > Workspace > Review** and select **Review Learning Center** from the learner's action menu. The CDC opens in a new window at the Learning Center's Summary page.
2. Click **Progress Tracker**. The Progress Tracker page opens with a list of their programs and courses and shows the current month centered in the calendar.
3. To view more details about a program or course, click its name in the list.
4. To email the learner, click **E-mail**. The Send E-mail dialog opens.
5. To print the Progress Tracker, click **Print**.

Additional Information

[About the Career Development Center](#)

[Review Learning Center in the Career Development Center](#)

Review Learning Groups in the Career Development Center

You can see the participants who are enrolled in the same programs and courses as the learner you are reviewing in the Career Development Center (CDC). You can hover the pointer over each participant to see their name in a pop-up tooltip, and click them to open their profile.

Reviewers with read-only access to the *Learning Group* feature in System Roles (Review Features > Review Submenu Features) can view participants in the learning group.

To review learning groups in the CDC

1. Go to **Home > Workspace > Review** and select **Review Learning Center** from the learner's action menu. The CDC opens in a new window at the Learning Center's Summary page.
2. Click **Learning Group**. The Learning Group page opens.
3. Hover the pointer over a **participant** icon to see their name.
4. Click a **participant** icon to open their profile.

Additional Information

[About the Career Development Center](#)

[Review Learning Center in the Career Development Center](#)

Run Learning Reports from the Career Development Center

You can run learning reports R213 (Individual Participant Report on Learning Programs) and R214 (Individual Participant Report on Learning Modules) for the learner you are reviewing in the Career Development Center (CDC). You can run the reports immediately or schedule them to run at a specific time.

Reviewers with read-only access to the *Course Reports* feature in System Roles (Manage Features > Report Categories) can run learning reports in the CDC.

To run learning reports in the CDC

1. Go to **Home > Workspace > Review** and select **Review Learning Center** from the learner's action menu. The CDC opens in a new window at the Learning Center's Summary page.
2. Click **Learning Reports**. The Learning Reports page opens.
3. Click one of the learning report links. The report opens in a new window.
4. Select the output format for the report.
5. Click the **Learning Module** link or box to select the course or program to report on. The selector opens in a new window.
6. Optionally, select the course or program's beginning and ending date to determine if its transcript is included in the report.
7. For learner's with multiple assignments, select the check box to include courses or programs from any of the learner's assignments.
8. Click one of the buttons to run or schedule the report.

Additional Information

[About the Career Development Center](#)

[Review Learning Center in the Career Development Center](#)

Review Accounts in the Career Development Center

You can review the account records for the learner's enrollments in the Accounts page in the Career Development Center (CDC). The values do not necessarily represent the charges paid, but can simply indicate the value attached to each training session.

The *Account Display Format* setting in System Roles (Data Access Control > Account Display Format) specifies whether the account information is shown in summary or detailed format. In the summary view format, for each course's enrollment only one record is shown with total values for debit and credit. In the detailed view format, account information is grouped and summarized by currency type.

Reviewers with read-only access to the *Review Accounts* feature in System Roles (Review Features > Review Submenu Features) can review account information relating to each training session in the CDC. Reviewers with unrestricted access can also add account information for training sessions.

To review a learner's account records in the CDC

1. Go to **Home > Workspace > Review** and select **Review Learning Center** from the learner's action menu. The CDC opens in a new window at the Learning Center's Summary page.
2. Click **Accounts**. The Accounts page opens.
3. To add a new record, click **Add**. The page refreshes with a blank account record form.
4. Complete the account transaction information for the course and click **Add**. The new account record is added to the Accounts page.

Additional Information

[About the Career Development Center](#)

[Review Learning Center in the Career Development Center](#)

Review SCORM Global Objectives in the Career Development Center

Some SCORM courses report global objectives. For those that do, you can view the course's objectives in the SCORM Global Objectives page in the Career Development Center (CDC) when reviewing a learner. The status of each objective is updated as the learner works through the course.

Reviewers with read-only access to the *SCORM Global Objectives* feature in System Roles (Review Features > Review Submenu Features) can review SCORM global objectives in the CDC.

To review SCORM global objectives in the CDC

1. Go to **Home > Workspace > Review** and select **Review Learning Center** from the learner's action menu. The CDC opens in a new window at the Learning Center's Summary page.
2. Click **SCORM Global Objectives**. The SCORM Global Objectives page opens and shows the objectives that the learner has met while working through the course.

Additional Information

[About the Career Development Center](#)

[Review Learning Center in the Career Development Center](#)

Review Career Center in the Career Development Center

The Career Center in the Career Development Center (CDC) includes a number of pages in which you can view and edit information related to a learner's training for their career, plus a summary page that lists their performance reviews.

On the Summary page you can view a list of the learner's competencies along with their proficiency level. You can drill down to the Competencies page where you can view the competency's details, update its proficiency level and award new competencies.

The pages and information visible to you depend on your System Role access permissions. Reviewers with read-only access to the *Career Center Summary* and corresponding features in System Roles (Review Features > Review Submenu Features) can view those sections in the Career Center in the CDC.

To review a learner in the Career Center

1. Go to **Home > Workspace > Review** and select **Review Career Center** from the learner's action menu. The CDC opens in a new window at the Career Center's Summary page.
2. Click on a competency to open it in the Competencies page. Alternatively, click one of the items in the Career Center menu on the left.

Additional Information

[About the Career Development Center](#)

[Review Job Profiles in the Career Development Center](#)

[Review Competencies in the Career Development Center](#)

[Review Training Gap Analysis in the Career Development Center](#)

[Share Files in the Career Development Center](#)

Review Job Profiles in the Career Development Center

You can view a learner's job profiles in the Job Profiles page in the Career Development Center (CDC). You can drill down to job profile details to see the competencies assigned to them and update the competency levels. You can drill down to the details for each competency from the job profile details page. Learners can see the job profiles assigned to them in their Career Center (Home > Career Center > Job Profiles).

Reviewers with read-only access to the *Job Profiles* feature in System Roles (Review Features > Review Submenu Features) can review learners' job profiles in the CDC. Reviewers with unrestricted access can also assign and de-assign job profiles.

To review job profiles in the CDC

1. Go to **Home > Workspace > Review** and select **Review Career Center** from the learner's action menu. The CDC opens in a new window at the Career Center's Summary page.
2. Click **Job Profiles**. The Job Profile page opens with a list of the job profiles assigned to the learner.

To see job profile's details and competencies, click the job profile name. The job profile's details open with a list of its competencies.

To assign a job profile to the learner, click **Assign job profile**.

To de-assign a job profile from a learner, click the job profile name to open its details page and then click **De-Assign Job Profile**.

Additional Information

[About the Career Development Center](#)

[Review Career Center in the Career Development Center](#)

Review Competencies in the Career Development Center

You can view a learner's competencies in the **Competencies** page in the Career Development Center (CDC). This page shows a list of summary information about the competencies awarded to the user. You can click a competency's name to see the following information:

- Current proficiency level
- Competency details
- Acquisition method
- Proficiency level scale
- Learning modules

If the current proficiency level was gained through training, clicking the **Details** link in the competency details page opens a dialog with:

- A summary of the competency courses including a status
- A link to the course catalog pages
- The expiry dates for module completion, which you can update subject to your system role access permissions
- Acquisition summary and last updated information

If the current proficiency level was gained through ad hoc assessment, clicking the **Details** link in the competency details page opens a dialog with:

- The expiry date of the assessment, which you can update subject to your system role access permissions
- Acquisition summary and last updated information

Learners can see the competencies they have been awarded in their Career Center (Home > Career Center > Competencies).

Reviewers with read-only access to the *Competencies* feature in System Roles (Review Features > Review Submenu Features) can review learners' competencies in the CDC. Reviewers with unrestricted access can also update competencies' proficiency levels and award new competencies.

To review competencies in the CDC

1. Go to **Home > Workspace > Review** and select **Review Career Center** from the learner's action menu. The CDC opens in a new window at the Career Center's Summary page.
2. Click **Competencies**. The Competencies page opens with a list of the competencies awarded to the learner.

To see more details about a competency

1. Click its name in the list. The detail page opens, where you can also drill down to more information about the current proficiency level.
2. Click **Back** to return to the Competencies page.

To update the proficiency level of any competencies awarded to the learner

1. Click **Update proficiency level**.
2. Click the level in the Level Code drop-down list. The Select a Level dialog opens where you can select the new proficiency level.
3. Click **Save** and then **Back** to return to the Competencies page.

To award a competency to the learner

1. Click **+ Award Competency**. All competencies from all competency models are listed.
2. Select a competency model from the drop-down list to filter the list of competencies if there are too many.
3. Select the proficiency level from the Select Level column for the competency you want to award. The Select a Level dialog opens.
4. Select a level to close the dialog.
5. Click **Save**.
6. Click **Back** to return to the Competencies page.

Additional Information

[About the Career Development Center](#)

[Review Career Center in the Career Development Center](#)

Review Training Gap Analysis in the Career Development Center

You can review the courses the reviewee needs to complete according to the job profiles assigned to them. The Training Gap Analysis page in the Career Development Center (CDC) lists the courses that the learner has not enrolled in or previously completed. This identifies the training gap between the learner's training requirements and completed training, so these courses should be in their training plan. Learners can view their training gaps in their Career Center (Home > Career Center > Training Gap Analysis).

Reviewers with read-only access to the *Training Gap Analysis* feature in System Roles (Review Features > Review Submenu Features) can review learners' training gaps in the CDC. You must have read-only access to the catalogs containing the courses in the list to see more details in the course catalog. To assign a course in the list to the learner, you must have unrestricted access to the *Assign Module* feature in System Roles (Review Features > Review Submenu Features).

To review training gap analysis in the CDC

1. Go to **Home > Workspace > Review** and select **Review Career Center** from the learner's action menu. The CDC opens in a new window at the Career Center's Summary page.
2. Click **Training Gap Analysis**. The Training Gap Analysis page opens with a list of the courses not in the learner's transcript history for the selected job profile.
3. To see the courses required for a specific job profile assigned to the learner, select the job profile from the Job Profile drop-down list.
4. To see the course details page for a course, click the course name. The course details page opens.
5. To assign a course to the learner, click **Assign to User**. The Enrollment Confirmation page opens, where you may need to enter additional enrollment information, such as a preferred date.
6. Click **Confirm enrollment**. The learner is enrolled in the course.

Additional Information

[About the Career Development Center](#)

[Review Career Center in the Career Development Center](#)

Share Files in the Career Development Center

You can upload files to share with learners you supervise in the Career Development Center (CDC). When you upload a file, learners will be able to download it from the My Files page in their Career Center. Subject to their System Role access permissions, learners may also upload files in their career center to share with you. Files can be deleted only by the person that uploaded them.

Reviewers with read-only access to the *Review My Files* feature in System Roles (Review Features > Review Submenu Features) can review and download files in the CDC. Unrestricted access is required to upload files to share with learners.

To share files in the CDC

1. Go to **Home > Workspace > Review** and select **Review Career Center** from the learner's action menu. The CDC opens in a new window at the Career Center's Summary page.
2. Click **My Files**. The My Files page opens with a list of files that both you and the learner have uploaded to share with each other.
3. To upload a file to share, click **Upload**.
4. To download a file, click its name in the list.

Additional Information

[About the Career Development Center](#)

[Review Career Center in the Career Development Center](#)

About the Enrollment Wizard

You can enroll learners in one or more courses in the Enrollment Wizard, update their enrollment status and extend their course deadlines. When you enroll learners or change their enrollment status you can suppress automatic emails, like enrollment confirmation, so that they are not sent.



Extending the deadline of a learning program also extends the deadlines of its component courses.

When you apply the enrollment or status change a summary report is shown, which shows for each learner and course whether the enrollment or status change action was successful or not. A history of enrollments and status changes applied in the Enrollment Wizard are listed at the bottom of the Enrollment Wizard page, from which you can download a log file and an error report.

Reviewers with unrestricted access to the *Enrollment Wizard* feature in System Roles (Review Features > Review Features) can enroll learners in courses in the Enrollment Wizard.

Reviewers with unrestricted access to the *Enrollment Wizard* and *Change Enrollment Status* features in System Roles (Review Features > Review Features) can update learners' enrollment status and extend their course deadlines in the Enrollment Wizard.

To enroll learners or update their status in the Enrollment Wizard, go to **Home > Workspace > Enrollment Wizard**.

Additional Information

[Enroll Learners in the Enrollment Wizard](#)

[Update Enrollment Status in the Enrollment Wizard](#)

[Allowed Transitions Between Enrollment Statuses](#)

Enroll Learners in the Enrollment Wizard

Reviewers with unrestricted access to the *Enrollment Wizard* feature in System Roles (Review Features > Review Features) can enroll learners in one or more courses in the Enrollment Wizard.

When enrolling learners, you can select a specific course completion date that takes precedence over any settings in the Catalog Editor, including for those module due dates that have already expired, will be expired, or have no due date. You can also specify the date from which participants can start the course.

To enroll learners via the Enrollment Wizard

1. Go to **Home > Workspace > Enrollment Wizard**. The Enrollment Wizard page opens.
2. Select **Enroll** from the Action drop-down list.
3. Click the Module(s) **+** icon to open the learning Module(s) selector page.
4. Select one or more courses and click **OK**.
5. Click the Participant(s) **+** icon to open the learning Participant(s) selector page.
6. Select one or more participants and click **OK**.
7. If you do not want enrollment confirmation emails to be sent, select the **Suppress automatic e-mails** check box.
8. To bypass enrollment restrictions and checks for valid enrollment during the group enrollment, select the **Override?** check box.
9. To run prerequisite checks configured for the learning module on the selected learners before enrolling them, select the **Perform prerequisite checks?** check box. Learners who fail to meet the prerequisites are not enrolled.
10. Optionally, enter the charged cost center, course completion deadline and restricted start date.
11. Click **Enroll**. The page refreshes with a summary report which shows the number of successful and failed enrollments.
12. Click **Back to Enrollment Wizard**. A record of the enrollment attempt is added to the top of the History list.
13. Click the links to download the enrollment processing log file and CSV error report to see more details about the enrollment processing and any reasons for failure respectively.

Additional Information

[About the Enrollment Wizard](#)

[Update Enrollment Status in the Enrollment Wizard](#)

Update Enrollment Status in the Enrollment Wizard

Reviewers with unrestricted access to the *Enrollment Wizard* and *Change Enrollment Status* features in System Roles (Review Features > Review Features) can update learners' enrollment status and extend their course deadlines in the Enrollment Wizard.

To update learners' enrollment status via the Enrollment Wizard

1. Go to **Home > Workspace > Enrollment Wizard**. The Enrollment Wizard page opens.
2. Select **Change Enrollment Status** from the Action drop-down list.
3. Click the Module(s) **+** icon to open the learning Module(s) selector page.
4. Select one or more courses and click **OK**.
5. Click the Participant(s) **+** icon to open the learning Participant(s) selector page.
6. Select one or more participants and click **OK**.
7. Select **Change overall status** from the Change enrollment procedure drop-down list.
8. If you do not want emails relating to the new status to be sent automatically, select the **Suppress automatic e-mails** check box.
9. Select the new status for the selected users and courses from the Target Status drop-down list.
10. Click **Change Enrollment Status**. The page refreshes with a summary report which shows the number of successful and failed status changes.
11. Click **Back to Enrollment Wizard**. A record of the status update attempt is added to the top of the History list.
12. Click the links to download the status change processing log file and CSV error report to see more details about the status change and any reasons for failure respectively.

To extend the deadline for the selected courses and participants

1. Follow steps 1 to 6, listed above.
2. Select **Extend module deadline** from the Change enrollment procedure drop-down list.
3. Enter the number of days extension.
4. Click **Change Enrollment Status**. The page refreshes with a summary report which shows the number of successful and failed status changes.

Additional Information

[About the Enrollment Wizard](#)

[Allowed Transitions Between Enrollment Statuses](#)

[Enroll Learners in the Enrollment Wizard](#)

Allowed Transitions Between Enrollment Statuses

The table below lists the enrollment statuses you can change a learner to depending on their current status.

Table: Allowed Transitions Between Enrollment Statuses

Current Status	Allowed target statuses
Not Started	Completed, Failed, Deactivated, In Process, No show, Waiver/Exempt, Withdrawn, Withdraw - Invalid Reason, Withdraw - Valid Reason
In Process	Completed, Excused, Failed, Deactivated, No show, Waiver/Exempt, Withdrawn, Withdraw - Invalid Reason, Withdraw - Valid Reason
Completed	Failed, Deactivated, In Process, Waiver/Exempt
Withdrawn	Withdraw - Invalid Reason, Withdraw - Valid Reason
Failed	Completed, In Process, Waiver/Exempt
No show	Completed, Failed, In Process, Waiver/Exempt
Waiver/Exempt	Completed, Failed, Deactivated, In Process
Withdraw - Valid Reason	Withdraw - Invalid Reason
Withdraw - Invalid Reason	Withdraw - Valid Reason
Excused	N/A
Dropped from Waitlist	N/A
Deactivated	Completed, Failed, In Process, No show, Waiver/Exempt

Additional Information

[About the Enrollment Wizard](#)

[Update Enrollment Status in the Enrollment Wizard](#)

About Supervisor Assessments

You can assess learners' on-the-job training (OJT) using supervisor assessments. When OJT learning modules are configured in the Catalog Editor, they can be assigned a supervisor assessments and one or more supervisors who can do the assessment. After learners complete the OJT course, an assigned supervisor completes the supervisor assessment, which then completes the course for the learner.

Supervisor assessments are a type of exam configured in the Exam and Question Manager. They can be assigned to individual OJT learning modules and also included in assessment workflow templates, in which multiple pre- or post-course assessments can be assigned to participants, instructors or direct appraisers.

Reviewers with unrestricted access to the *Supervisor Assessment* feature in System Roles (Review Features > Review Features) can launch supervisor assessments.

To view and launch pending supervisor assessments, go to **Home > Workspace > Supervisor Assessments**.

Additional Information

[Launch a Supervisor Assessment](#)

Launch a Supervisor Assessment

You can view and launch pending supervisor assessments for on-the-job (OJT) courses for which you have been specified as a supervisor. The Supervisor Assessments page lists the OJT course participants awaiting supervisor assessment. You can also view participants' profiles in the Career Development Center (subject to your role's access permissions) and view the OJT course details page.

You can filter the list of supervisor assessments by:

- Participant
- Assessment Status (All, Incomplete, Completed)
- Learning Status (All, Active, Completed)

Reviewers with unrestricted access to the *Supervisor Assessment* feature in System Roles (Review Features > Review Features) can launch supervisor assessments.

To launch a supervisor assessment

1. Go to **Home > Workspace > Supervisor Assessments**. The Supervisor Assessments page opens.
2. Select **Launch Assessment** from a participant's action menu. The assessment instruction page opens.
3. Click **Start the assessment**. The Exam Disclaimer dialog opens.
4. Click **Confirm and Proceed**. The Exam Disclaimer dialog closes and the assessment launches. Depending on the OJT learning module configuration, you may have the option to select a language for the supervisor assessment when you launch it.
5. Answer each assessment question and click **Submit response**. At the end of the assessment the Supervisor Assessment Results page summarizes the assessment results.
6. To view the supervisor assessment exam questions and marks for each, click **Review Your Exam**. The Exam Review page opens, from which you can also review your question responses and open the questions for editing in the Question Editor (subject to your role's access permissions).
7. To return to the Supervisor Assessments page, click **Close Exam Window**.

Additional Information

[About Supervisor Assessments](#)

About Compliance Analytics

Compliance Analytics performs a real-time analysis of training records to identify the degree (expressed as a percentage) to which departments, groups, and individuals have completed one or more specified courses. When scanning records, courses with an overall status of Completed, Finished Using, and Passed are interpreted as Completed for statistical purposes.

When calculating the overall compliance results for groups, each individual is interpreted as either conforming or nonconforming.

For example:

- Learner A in department X has completed 10 of 10 courses.
- Learner B in the same department has completed 2 of 10.

The percentage compliance overall for department X is 50% (1 of 2 compliant), while the training progress figure is 60% (12/20 courses completed).

There are five steps to setting up compliance analytics:

1. [Select the participants](#)
2. [Select the modules or program sessions](#), including possible equivalents
3. [Select the transcripts](#), which will only be for the participants and courses selected in the above steps
4. [Select the criteria for compliance](#) based on dates, revision and enrollment
5. [Filter the results](#)

Those steps are applied in sequence, filtering out transcripts at each step. So it is possible to run compliance analysis for users with multiple enrollments within the time period selected, where, for example, the 'most recent' may not comply while a previous enrollment will comply.

Compliance Analytics is available for the *eLearning+* and *Learning* licenses.

Reviewers with read-only access to the *Compliance Analytics* feature in System Roles (Manage Features > Compliance Analytics) can set up and run compliance analytics.

To set up compliance analytics, go to **Home > Reports > Compliance Analytics**.

Additional Information

[Compliance Analysis Types](#)

Select Participants for Compliance Analytics

You can select participants for analysis individually (without grouping) or by one or the following grouping methods:

- One or more organizations
- One or more user groups
- One or more direct appraisers

To select participants for compliance analysis

1. Go to **Home > Reports > Compliance Analytics**. The Compliance Analytics page opens.
2. To include all participants by organization, user group or appraiser, select a grouping criteria from the *Participants grouped by* drop-down list. To select participants individually, select **No grouping**.
3. Click in the **Organizations** or **User Groups** boxes to select them, or click the **browse** icon to select direct appraisers or individual participants. The appropriate selector dialog opens.
4. If you selected participants by organization or user group and you want to include participants with closed accounts, select the **Include closed user accounts** check box.

Next step: [Select the Modules or Program Sessions for Compliance](#)

Additional Information

[Select the Transcripts for Compliance Analytics](#)

[Select the Criteria for Transcript Compliance](#)

[Filter Compliance Results](#)

[About Compliance Analytics](#)

Select the Modules or Program Sessions for Compliance

You can select the type of analysis and then the target modules or program sessions for the analysis. For more information about the analysis types, see [Compliance Analysis Types](#).

To select the modules or program sessions for compliance analysis

1. Go to **Home > Reports > Compliance Analytics**. The Compliance Analytics page opens.
2. Scroll down to Step 2: Target Learning.
3. Select the analysis type from the drop-down list.
4. Click the **+** icon to select the learning modules or programs to include in the analysis.

Next step: [Select the Transcripts for Compliance Analytics](#)

Previous step: [Select Participants for Compliance Analytics](#)

Additional Information

[Select the Criteria for Transcript Compliance](#)

[Filter Compliance Results](#)

[About Compliance Analytics](#)

Compliance Analysis Types

You can select the following types of analysis:

- Modules
- Program sessions
- Program progress

The Modules type considers transcripts for the selected target learning only and does not drill down into program components.

The Program Sessions type considers transcripts for modules in the selected target program session.

For the Program Progress type, for each selected target program session the analysis identifies an appropriate enrollment for the learner and produces results against transcripts within the identified enrollment's transcript hierarchy.

The following scenario shows the difference between the three analysis types:

- A program *P1* with a single session that contains a Module *O1*
- A learner completes *O1* as a standalone module
- Subsequently, the learner enrolls in *P1* and fails the component *O1*

The learner's records would look like this:

Table: Learner Transcripts

Transcript ID	Module ID	Status
T1	O1	Completed
T2	P1	In Process
T3	O1	Failed

Using default settings, the compliance analysis for the learner and program session would show the following results:

Table: Results of Compliance Analysis

Type	Compliance Status	Considered Transcripts
Modules	Not Compliant	T2
Program Sessions	Compliant	T1
Program Progress	Not Compliant	T2, T3

Additional Information

Select the Modules or Program Sessions for Compliance

Select the Transcripts for Compliance Analytics

Compliance Analytics uses the transcripts for the participants identified in step 1 (Target Participants) and for the learning modules or program sessions selected in step 2 (Target Learning). You can further limit the transcripts to include in step 3 (Target Transcripts).

To select the transcripts for compliance analysis

1. Go to **Home > Reports > Compliance Analytics**. The Compliance Analytics page opens.
2. Scroll down to Step 3: Target Transcripts.
3. Select the check boxes if you want to include self-enrolled target transcripts and completed equivalent transcripts.
4. If a participant has multiple enrollments for a given course, select whether to match the compliance criteria against any of the participant's transcripts or only their most recent transcript.

Next step: [Select the Criteria for Transcript Compliance](#)

Previous step: [Select the Modules or Program Sessions for Compliance](#)

Additional Information

[Select Participants for Compliance Analytics](#)

[Select the Criteria for Transcript Compliance](#)

[Filter Compliance Results](#)

[About Compliance Analytics](#)

Select the Criteria for Transcript Compliance

In this step you define the criteria for transcripts to be compliant. You can select whether learning must have been completed between two specified dates, or whether learning is completed or on-target by a specified date in the future. (This can be used to identify participants who will lose their on-target status if they do not complete some learning by the specified date.)

You can select whether the learning can be from any revision or must be on the effective revision.

To select the criteria for compliance

1. Go to **Home > Reports > Compliance Analytics**. The Compliance Analytics page opens.
2. Scroll down to Step 4: Criteria for Compliance.
3. Select an option and the dates for Compliance Definition. This step is optional.
4. Select the Revision constraint.
5. Select an inclusion option for participants.
 - **All Target Learning**
Applies only to the Module analysis type.
 - **Learning in Enrolled Target Program Sessions**
Applies to Program Sessions and Program Progress analysis types. Completed sub-module transcripts are not counted if the participants have not yet enrolled into the program session selected in step 2. The analysis results for participants without any counted transcripts show *N/A*.
 - **Target Program Sessions with Auto-Enroll Criteria that apply**
Only participants who are auto-enroll targets for the selected program sessions are included in the compliance analysis. Leftover participants are reported as *N/A* in the analysis results.
6. To exclude transcripts for enrollments that are no longer required, select the **Disregard Deactivated Target Modules / Program Sessions** check box. The modules and sessions are marked as *N/A* instead of compliant or non-compliant if the participant's overall status for them is Deactivated.

Next step: [Filter Compliance Results](#)

Previous step: [Select the Transcripts for Compliance Analytics](#)

Additional Information

[Select Participants for Compliance Analytics](#)

[Select the Modules or Program Sessions for Compliance](#)

[Filter Compliance Results](#)

[About Compliance Analytics](#)

Filter Compliance Results

After compliance per participant has been calculated in Step 4, Compliance Analytics can further filter the results so that you can focus on the necessary information only.

You can choose to focus on:

- All Participants
- Compliant Participants Only
- Non-compliant Participants Only

You can also choose to include learners with no enrollments on any target learning. Learners with no enrollments are those reported as *N/A* in the analysis results.

To filter the compliance results

1. Go to **Home > Reports > Compliance Analytics**. The Compliance Analytics page opens.
2. Scroll down to Step 5: Results Filtering.
3. Select the participants to include in the analysis results, in terms of their compliance.
4. If required, select the check box to include learners with no enrollments on any target learning.
5. Click **Start Analysis**. The page refreshes with the compliance analysis results, which you can print and export to a comma-separated variable (CSV) file.

Previous step: [Select the Criteria for Transcript Compliance](#)

Additional Information

[About Compliance Analytics](#)

[Select Participants for Compliance Analytics](#)

[Select the Modules or Program Sessions for Compliance](#)

[Select the Transcripts for Compliance Analytics](#)

About the Integrated User Calendar

You can view learners' scheduled courses in the Integrated User Calendar, and also enroll other learners you supervise. You can filter the calendar by:

- Organization
- Learning module
- Category
- Participant
- Instructor

Reviewers with read-only access to the *Integrated User Calendar* feature in System Roles (Review Features > Review Features) can view the Integrated User Calendar.

Reviewers with unrestricted access to the *Enroll Other Users* and *Enrollment Wizard* features in System Roles (Review Features > Review Features) can enroll other learners in a learning module.

To open the Integrated User Calendar, go to **Home > Workspace > Integrated User Calendar**.

Transcript Detail Visibility

The data access control *Display Details, Progress, and Course Interactions when Reviewing Learner Transcript Detail* controls the reviewer's view of the transcript detail for reviewees. By default, only the System Administrator role has this access enabled.

An administrator can grant differing access to the transcript detail of reviewees to reviewers, direct appraisers, and instructors from the Organization Maintenance page. Similar to the *Level of Visible Transcript Detail for learners* option in System Configuration, the levels of transcript detail visibility can be set to:

- Completion Status Only
- Details and Overall Progress
- Details, Overall Progress, and Individual SCO Progress

Shareable Content Object. These are the individual, reusable learning components within a SCORM package.

- Details, Overall Progress, Individual SCO Progress, and Course Interactions

The Transcript Detail page is not accessible from the Records/Transcript page for users with their visibility level set to *Completion Status Only*.

Users with visibility level set to any of the other options above have access to the Transcript Details page to view more transcript detail. Additionally, users with *Details, Overall Progress, Individual SCO Progress, and Course Interactions* have full access to all information on the Transcript Details page.

If a reviewer can view full transcript details, they can also open the Transcript Details page by clicking the course title links. In the Active/Archive Course areas of the Teach menu, full transcript detail is always displayed except when a transcript is in Pending Approval or Waitlisted status in User Review. The level of transcript detail available under the Administrative Access area is controlled by the same rule as the CDC.

Instructors are usually able to see full transcript details. However, in some highly regulated countries, even instructors are not allowed to have access to transcript details like question responses and scores. In cases like this, the LMS has a feature to control the level of transcript details instructors can view, which is configurable at the organization level. This setting complements the other two options that apply to the direct appraiser or to reviewers in general.

When the reviewer is both an instructor of the course and the direct appraiser of the learner, whichever has the greater level of visibility is granted to the reviewer.

Action Menu



*Action Menu Icon
(legacy UI)*

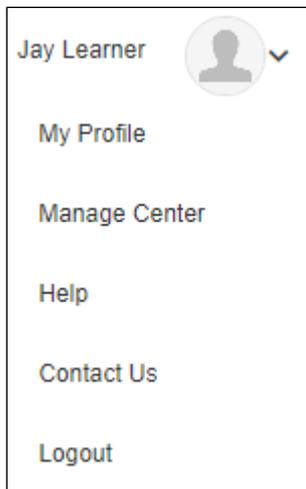


*Action Menu Icon
(Responsive UI)*

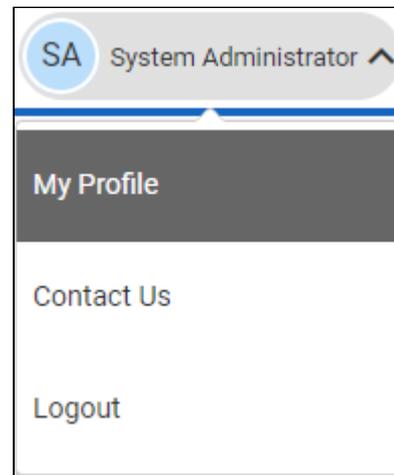
The action menu is a drop-down list from which you can select an action (for example, create or delete an object).

The LMS presents many objects in lists, for both learners and administrators, including learning modules, classroom resources, user accounts, and enrollment requests. Each item in the list has an action menu.

Avatar Menu



*Avatar Menu Icon
(legacy UI)*



*Avatar Menu Icon
(Responsive UI)*

Figure: Comparison of Avatar Menus

The Avatar menu is a drop-down list from which users can select an action (for example, log out, access their profile).