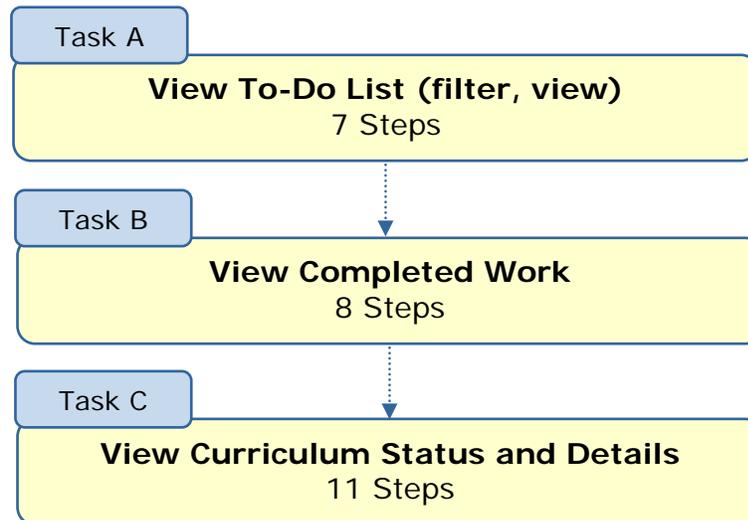


## Job Aid: Viewing User Records

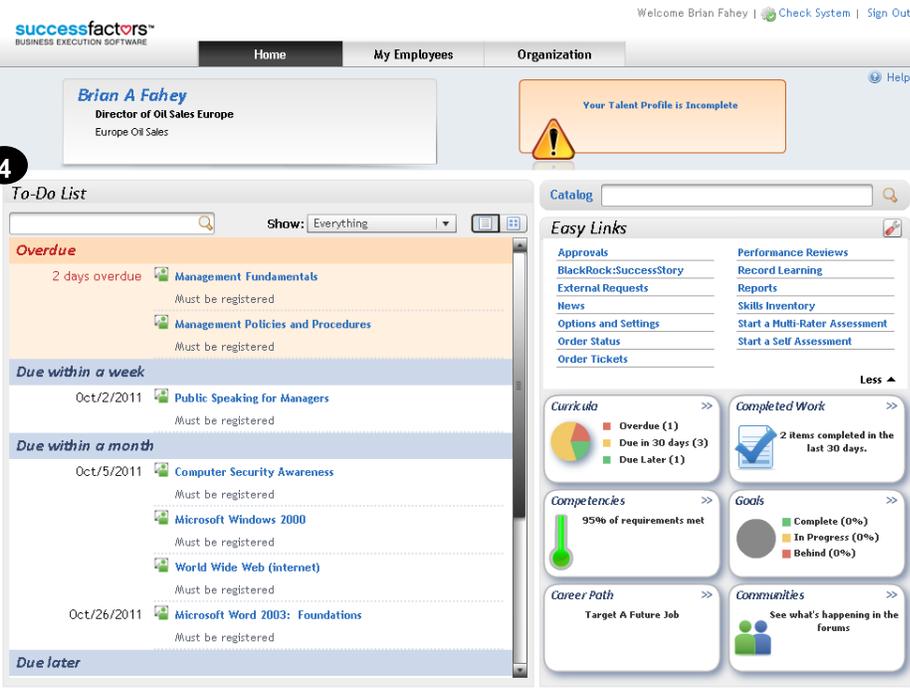
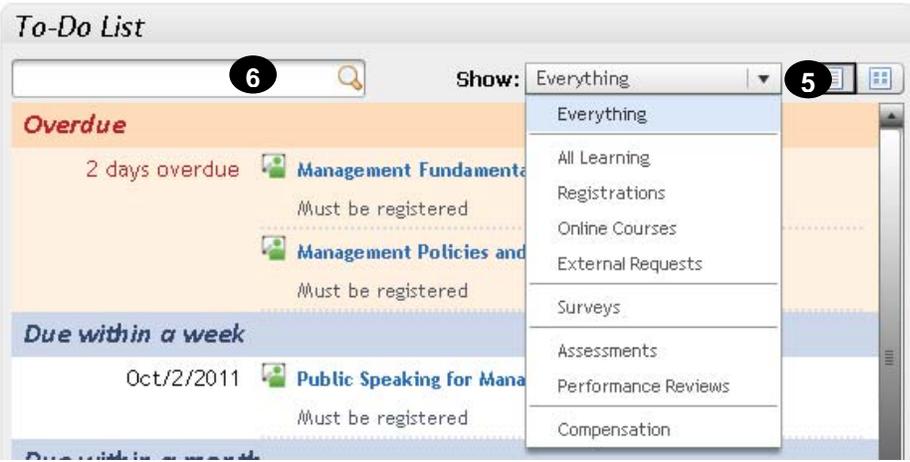
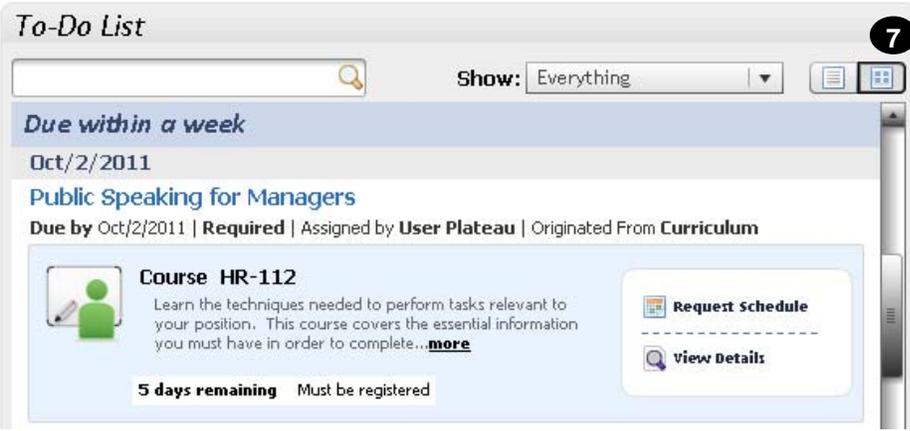
### Purpose

The purpose of this job aid is to guide users through the step-by-step process of viewing their records. Each task demonstrates viewing of different records.



### Task A. View To-Do List

- 1 Enter the web address (URL) of the user application into your browser *Address* field and press the Enter key.
- 2 Enter your user ID in the **User ID** textbox.  
Enter your password in the **Password** textbox.
- 3 Click **Sign In**.

<p><b>4</b> On the Home page, view the To-Do List.</p> <p>This panel displays a consolidated view of tasks requiring action. This means that all tasks are in one place.</p> <p>The To-Do List can be filtered and viewed in different ways.</p>	
<p><b>5</b> Click the Show drop-down menu to select a filter option.</p> <p><b>6</b> Enter text into the 'type ahead' search box to filter the To-Do List.</p> <p><i>Note: Hover over each title in the To-Do List for additional information.</i></p>	
<p><b>7</b> Users may prefer to display the To-Do List actions as a card view. Click the Card View (📄) icon from the top left menu for full details. The card view displays navigation links for each relevant action.</p>	

Task B. View Completed Work

1 On the Home page, click the Completed Work status pod.

Completed Work displays a combined list of all tasks completed. It combines learning and performance activities such as courses, performance reviews, and competency assessments.

2 Sort the table by selecting the column header. The table to the right is sorted by the *Completion Date*. The sort order arrow (  $\uparrow$  ) indicates the column is sorted in ascending order.

3 Click any column header to sort the display based on *Title*, *Status*, or *Completion Date*.

Type	Title	Status	Completion Date
Assessment	Self Assessment	Completed	Sep/27/2011 12:04 PM
Learning	Company Benefits Orientation	Passed Course	Jun/26/2011 05:00 PM
Learning	Emergency Preparedness	Read or Viewed	May/26/2011 05:00 PM
Learning	Overview & Orientation	Completed	Apr/13/2011 05:00 PM
Learning	Emergency Evacuation Procedures	Completed	Mar/2/2011 05:00 PM
Learning	Building Access Policies and Procedures	Collateral Credit	Feb/26/2011 05:00 PM
Learning	Company Procedures and Policies	Read and Acknowledged	Sep/26/2010 05:00 PM
Learning	Emergency Evacuation Procedures	Completed	Jun/7/2010 05:00 PM
Learning	New Employee Orientation	Passed Course	Dec/1/2003 01:21 PM
Learning	Vision Testing	Attended Event or Activity	Jun/4/2003 04:00 PM

- 4 The Completed Work list can be filtered by type by selecting from the Type column drop-down menu.
- 5 Filter the table by title by using the 'type ahead' text entry box.
- 6 Filter the table by status by selecting from the Status column drop-down menu.

Completed Work

Competency History

Show Completions: All

Type	Title	Status	Completion Date *
Assessment	Self Assessment	Completed	Sep/27/2011 12:04 PM
Learning	Company Benefits Orientation	Passed Course	Jun/26/2011 05:00 PM
Learning	Emergency Preparedness	Read or Viewed	May/26/2011 05:00 PM
Learning	Overview & Orientation	Completed	Apr/13/2011 05:00 PM
Learning	Emergency Evacuation Procedures	Completed	Mar/2/2011 05:00 PM
Learning	Building Access Policies and Procedures	Collateral Credit	Feb/26/2011 05:00 PM
Learning	Company Procedures and Policies	Read and Acknowledged	Sep/26/2010 05:00 PM
Learning	Emergency Evacuation Procedures	Completed	Jun/7/2010 05:00 PM
Learning	New Employee Orientation	Passed Course	Dec/1/2003 01:21 PM
Learning	Vision Testing	Attended Event or Activity	Jun/4/2003 04:00 PM

11 Items \* All dates are for America/New York time zone.

*Note: The 'type ahead' feature allows you to start typing in the box, and if you have one or more list items that contain the text that you typed, then the system will show only those list items. The type ahead filter is not case sensitive.*

- 7 Filter the table by completion date by using the Show Completions drop-down options to show only completions after, before, or between selected dates.

Completed Work

Competency History

Show Completions: All

Please enter a valid date

Show Completions: Before

Completion Date \*

Find

- 8 The user can click the title link and choose a desired option. In this example, click to View Details or Print Certificate.

Completed Work

Competency History

Show Completions: All

Type	Title	Status	Completion Date *
Assessment	Self Assessment	Completed	Sep/27/2011 11:45 AM
Learning	Company Benefits Orientation	Passed Course	Jun/26/2011 05:00 PM
Learning	Emergency Preparedness	Read or Viewed	May/26/2011 05:00 PM
Learning	Overview & Orientation	Completed	Apr/13/2011 05:00 PM
Learning	Emergency Evacuation Procedures	Completed	Mar/2/2011 05:00 PM

**Company Benefits Orientation**

CPE Hours : 3.00  
Credit Hours : 8.00  
Completion Date : Jun/26/2011 05:00 PM

[View Details](#)  
[Print Certificate](#)

Task C. View Curriculum Status and Details

1 On the Home page, click the Curricula pod.

This page displays all assigned curricula, a next action and expiration date if applicable, and who assigned the curricula.

2 The curricula list can be sorted by *Curriculum Title*, *Next Action Date* or *Expiration Date* by clicking the column header.

3 The status of each curriculum can be identified by the folder icon. If a green checkmark displays, the curriculum is complete.

4 Click the curriculum title links to view curriculum details.

Curriculum Title	Next Action Date	Expiration Date	Assigned By	Remove
Office Management	⚠ Sep/25/2011	N/A	Admin	
Management Development (all directors)	📁 Oct/2/2011	N/A	Admin	
IT Basics	📁 Oct/5/2011	N/A	Admin	
Software Tools (all employees)	📁 Oct/26/2011	N/A	Admin	
General Employee Orientation	✅ Mar/1/2012	Mar/1/2012	Admin	

*Note: The Next Action Date is the next due date in the curriculum. The due date that displays belongs to the item that has the nearest due date. If there is an issue with the next action date, the Alert icon (⚠) displays.*

- 5 To view item requirements, click the expand icon (⊕) for additional details about each item within the curriculum.
- 6 The item list can be sorted by the suggested order or by due date by selecting the option from the View by drop-down menu.
- 7 The Curriculum Details page also indicates whether the curriculum is complete or incomplete and if it requires retraining (🔄).
- 8 The type column indicates the item type (blended learning, instructor-led, or online).
- 9 The Due by column indicates when the item is due.
- 10 The date completed column displays the completion date for each item.
- 11 The Action column displays different buttons depending on the item type.

**Curriculum Details**

**Software Tools (all employees)**  
Curriculum ID: IT-101  
Assigned By: Admin (User Plateau)  
Description: All the learning components required to qualify a student for Software Tools (all employees).

**7 Incomplete**

**5** Due by: Oct/26/2011

Due by	Type	Title	Action
Oct/26/2011	Blended Learning	World Wide Web (internet)	<b>11</b> Request Schedule
Oct/26/2011	Blended Learning	Microsoft Word 2003: Foundations	View Offerings
Oct/26/2011	Blended Learning	Microsoft Windows 2000	Request Schedule
Oct/26/2011	Blended Learning	Computer Security Awareness	View Offerings

**Curriculum Details**

**General Employee Orientation**  
Curriculum ID: HR-100  
Assigned By: Admin (User Plateau)  
Description: All the learning components required to qualify a student for General Employee Orientation.

**7 Complete**

**9** Due by: Mar/11/2012

Due by	Type	Title	Completion Date	Action
	Blended Learning	New Employee Orientation	Completed on Dec/1/2003	<b>10</b> Request Schedule
	Blended Learning	Company Benefits Orientation	Completed on Jun/26/2011	<b>11</b> View Offerings
	Blended Learning	Overview & Orientation	Completed on Apr/13/2011	Go to Content
	Blended Learning	Company Procedures and Policies	Completed on Sep/26/2010	Go to Content
Mar/11/2012	Blended Learning	Emergency Evacuation Procedures in Subcurricula HR-001	Completed on Mar/2/2011	Request Schedule
May/25/2012	Blended Learning	Emergency Preparedness in Subcurricula HR-001	Completed on May/26/2011	Request Schedule
	Blended Learning	Building Access Policies and Procedures in Subcurricula HR-001	Completed on Feb/26/2011	Request Schedule