PLATEAU

SATERN Learning

Reference Guide

Plateau LMS v 5.5

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Logging In

If your organization uses Single Sign On, you will not see this login screen.

Logging In

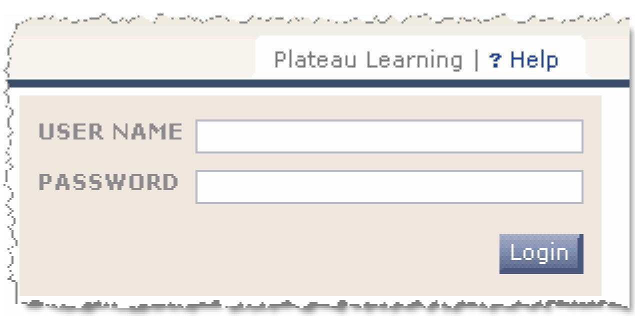
1. In the **User Name** text box, enter the User Name provided to you by your organization.

   The User Name is case-sensitive. Be careful not to include any spaces before or after your User Name; spaces are counted as characters.

2. In the **Password** text box, enter the password provided to you by your organization.

   The password is not case-sensitive. After logging in, be sure to change the password from the default so no one else can access your account!

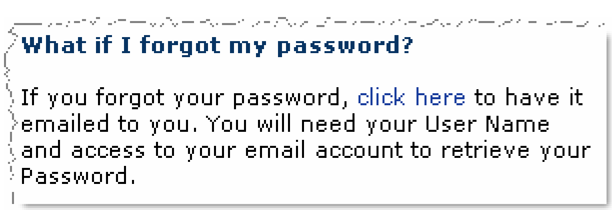
3. Click on the Submit button.



Forgetting Your Password

On the login screen, click on the **click here** link to have your password emailed to you.

You need to know your User Name.



the Community page listing all topics, we would click on the second link. To return to the main Communities page, we would click on the Communities link.

Sorting Displayed Data

Data is often displayed in tables. In these tables, you can sort by some columns in the table, and choose ascending or descending order.

Below is an example of the Learning History table. This is the history of all learning events that you have completed or attempted to complete.

- The Learning History below is currently sorted by the Completion Date. This is evident by the yellow highlight.
- The ▾ indicates it is sorted in descending order.
- To change the sort order to ascending, click on the Completion Date column header. The arrow will change to ▴, and immediately re-sort the page contents.
- You can change the sort column to any column over which the mouse pointer turns into a hand . In this case, the Title is the only other sort column.

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Understanding the Learning Plan

The table below describes each column of the Learning Plan.

Title	Required By	Status	Action
Click to access basic information about the Item, including: • Item Key (Item Type and ID) • Item Revision (version) • Description **Company Policies and Procedures** The Item title is a link. Click to open a detailed view of the Item record, including: • Assignment Information • Item Details • Prerequisites • Substitutes • Related Documents	Apr/11/2005 An orange date with an exclamation point indicates an overdue assignment. A black date indicates the future Required Date (deadline).	Indicates your status or requirements to complete the Item. *(See the chart on the next page)*	Register The available Actions will vary depending on your status. Possible Actions are: • **Remove From Plan** Available if Item was self-assigned. • **Request Schedule** Available if instructor-led, and there are no Scheduled Offerings avilable. • **Launch Content** Available if online content exists and is available at that time (some content can be scheduled for specific times, and require enrollment in a Scheduled Offering). • **View Registration** Available if you are registered for a Scheduled Offering. • **Register** You are not enrolled and there are Scheduled Offerings you can register for. • **Access Community** If a Community exists for the Item, open the Community. • **Join Virtual Session** The Item is a Virtual Learning Session (ie Centra, WebEx, LiveMeeting), and is currently in session.

Once an assigned Item has been successfully completed, the Learning Event is saved in the Learning History, and the Item will be removed from the Learning Plan. If an Item remains on your Learning Plan after you complete it, check the Required Date. Some Items may require that you complete them on a regular interval, therefore they will not be removed from your Learning Plan.

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Item Statuses and Actions

The table below lists the statuses and corresponding Actions that can be displayed in the Learning Plan for an Item. Each status and action has a brief explanation to help you understand why that action/status is being displayed.

Status	Available Actions
Prerequisites not met You have not completed the prerequisite Items necessary to take this Item.	**Request Schedule** There are no Scheduled Offerings but you can be placed on a request list for future offerings. **Remove from Plan** If self-assigned, you can remove an Item from your Learning Plan. **Access Community** If a Community exists for the Item, open the Community.
Enrolled You are currently registered for a Scheduled Offering.	**View Registration** You can withdraw (if you self-registered) and view registration details from the Registration page. **Access Community** If a Community exists for the Item, open the Community.
On Waitlist You are currently on a waitlist for a Schedule Offering. You may be enrolled if someone drops the class or is removed.	**View Registration** You can withdraw (if you self-registered) and view registration details from the Registration page. **Access Community** If a Community exists for the Item, open the Community.
Pending Approval You have attempted to self-register for a Scheduled Offering of the Item that requires a supervisor's approval. The supervisor has been sent an email, and must approve your enrollment.	**View Registration** You can withdraw (if you self-registered) and view registration details from the Registration page. **Access Community** If a Community exists for the Item, open the Community.
Enrolled, In Session You are registered (enrolled) in a Scheduled Offering, and the class is currently in session.	**Join Virtual Session** The Item is a Virtual Learning Session (ie Centra, WebEx, LiveMeeting), and is currently in session. **View Registration** You can withdraw (if you self-registered) and view registration details from the Registration page. **Access Community** If a Community exists for the Item, open the Community.

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Status	Available Actions
Enrolled, Not in Session You are registered (enrolled) in a Scheduled Offering, and the class is not currently in session. However, the Scheduled Offering Start Date has passed, but the End Date is still in the future. Example: If a Scheduled Offering is 3 days long, from 9-5 each day, and you check your Learning Plan at 7:00 on the second day, your status is Enrolled, Not in Session.	**View Registration** You can withdraw (if you self-registered) and view registration details from the Registration page. **Access Community** If a Community exists for the Item, open the Community.
Not Available There is online content that cannot be launched; the content has been taken offline by an administrator.	**Remove from Plan** If self-assigned. **Access Community** If a Community exists for the Item, open the Community.
Must be Registered There is online content that cannot be launched until you are registered (enrolled) in a Scheduled Offering of the Item.	**Register** There are Scheduled Offerings available. **Request Alternative Schedule** There are no Scheduled Offerings but you can be placed on a request list for future offerings. **Remove from Plan** If self-assigned, you can remove an Item from your Learning Plan. **Access Community** If a Community exists for the Item, open the Community.
Locked Out An administrator or the system has locked you out of the Item.	**Remove from Plan** If self-assigned, you can remove an Item from your Learning Plan. **Access Community** If a Community exists for the Item, open the Community.
Available There is online content that can be launched, and you have not yet launched any of the online content for this Item.	**Launch Content** There is online content you can launch. **Remove from Plan** If self-assigned, you can remove an Item from your Learning Plan. **Access Community** If a Community exists for the Item, open the Community.

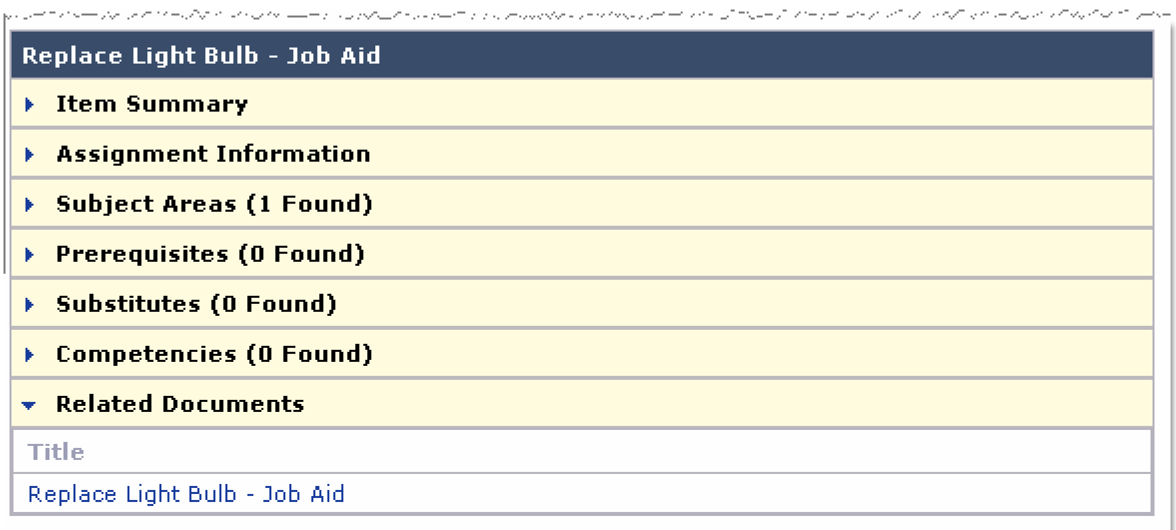
Status	Available Actions
Launch During Session The online content is only available at specific times during the Scheduled Offering in which you are enrolled.	**View Registration** View registration or withdraw yourself if you self-registered. **Remove from Plan** If self-assigned, you can remove an Item from your Learning Plan. **Access Community** If a Community exists for the Item, open the Community.
In Progress You have already launched the online content for this Item, and can resume using the Launch Content action.	**Launch Content** There is online content you can launch. **Remove from Plan** If self-assigned, you can remove an Item from your Learning Plan. **Access Community** If a Community exists for the Item, open the Community.

Viewing the Item Details

The Title of an Item on the Learning Plan and the Catalog is a clickable link. Click on this link to open the Item Details.

The Item Details display:

- **Assignment Information** – who assigned the Item, when it was assigned, and when it is due.
- **Item Details** – Delivery method, length, contact person
- **Prerequisites** – What Items must be completed before you can take the Item. From this section you can add the Prerequisite Items to your Learning Plan.
- **Substitutes** – Which Items can be taken in place of the Item you are viewing.
- **Related Documents** – Click on the Documents listed to open the file. Related Documents can include pre-work, class readings, and additional information (*see image below*).



Assigning Items to Your Learning Plan

You can assign Items to your Learning Plan using the Catalog. You have the option to remove any self-assigned Item from your Learning Plan.

1. Select **Catalog** → *Search Method* from the top menu bar.
   (see the Using the Catalog section for explanation about searching)

2. Click on the **Add to Learning Plan** button in the Action column.

Catalog Search Results

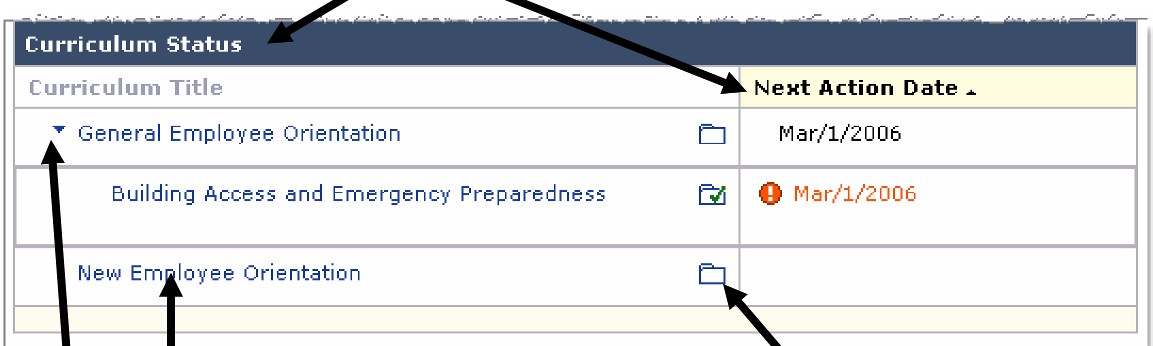
Title	Type	Price ($)	Status	Action
Basic Electronics		--	Already On Plan	
History of the Light Bulb ✓		0.00	--	Add to Learning Plan

Viewing Grouped Item Assignments (Curricula)

Some Items are meaningfully grouped so that they can be assigned and tracked as a single unit. These groups of Items are called **Curricula**. Curricula can only be assigned by an administrator; you cannot self-assign them. While the Items appear on the Learning Plan, you can view which ones are part of curricula by looking at your Curriculum Status page. Your status page displays your status for completion of the Curricula you have been assigned.

Select **Learning → Curriculum Status** from the top menu bar.

Sort
Click to sort by Title or Next Action Date, in ascending or descending order (the arrow indicates which order is being displayed).



View Items in the Curriculum
Click on the Title to display a list of the Items that are members of the Curriculum, their Required Dates, and their Completion Statuses. These are the same Items displayed on your Learning Plan, only now you can see to what Curricula they are assigned.

Curriculum Completion Status
Each folder represents a Curriculum. Completed Curricula are indicated with a green checkmark.

View SubCurricula
Some Curricula can contain other Curricula called SubCurricula. Click on the ▸ to expand and view the SubCurricula.

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Using the Catalog

The Catalog contains all of the Items and Scheduled Offerings that your organization has made available to you for self-assignment. You can use the Catalog to locate Items and Scheduled Offerings, assign Items to your Learning Plan, launch Online Items, and Register for Scheduled Offerings.

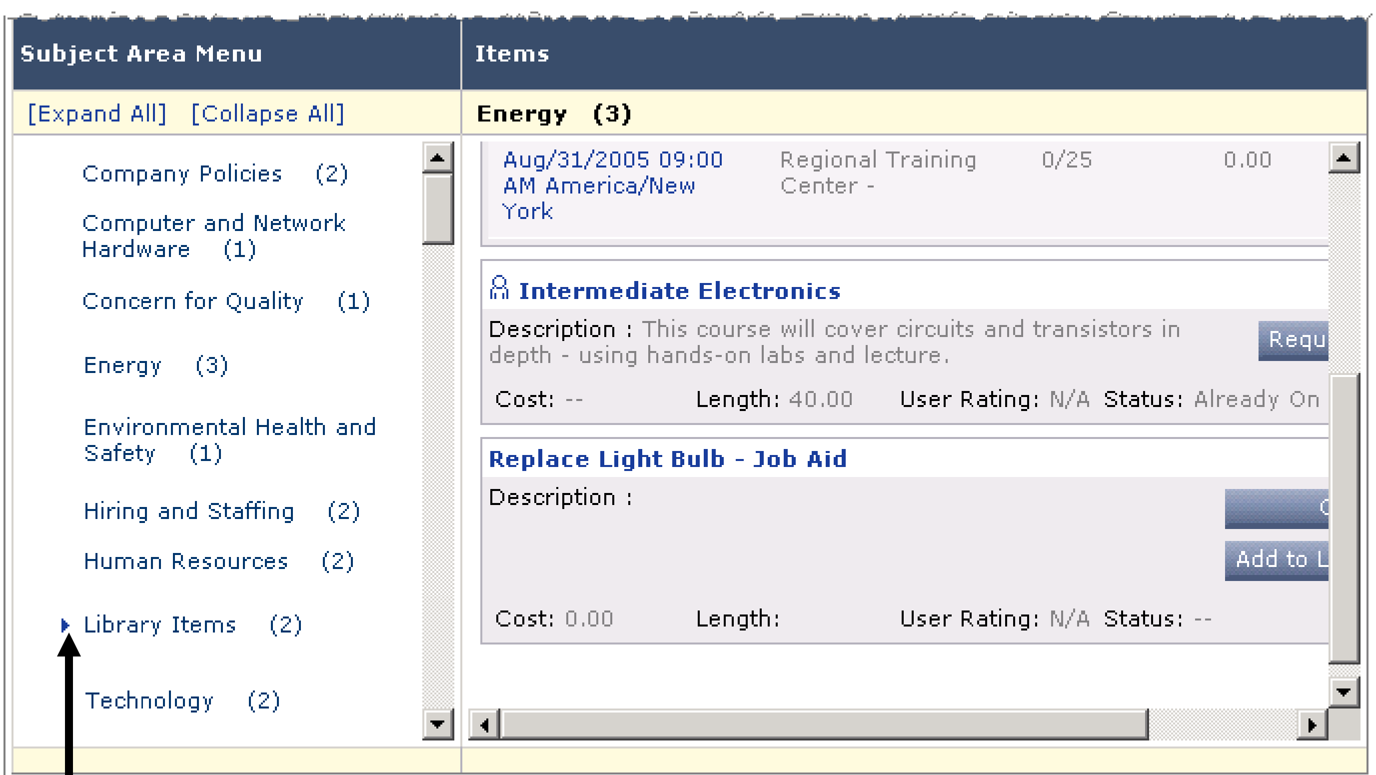
Select **Catalog** → ***Search Method*** *(see list below)* from the top menu bar.

You can search the catalog four ways:

- Browse Catalog
- Calendar of Offerings
- Simple Catalog Search
- Advanced Catalog Search

Browse Catalog

You can browse the Items in the Catalog by Subject Area. Each Item is assigned to one or more Subject Areas. Clicking on a Subject Area will display all Items in the Catalog assigned to that Subject Area.



Subject Areas can be hierarchical. Click on the ▸ to expand the Subject Area to display the child Subject Areas.

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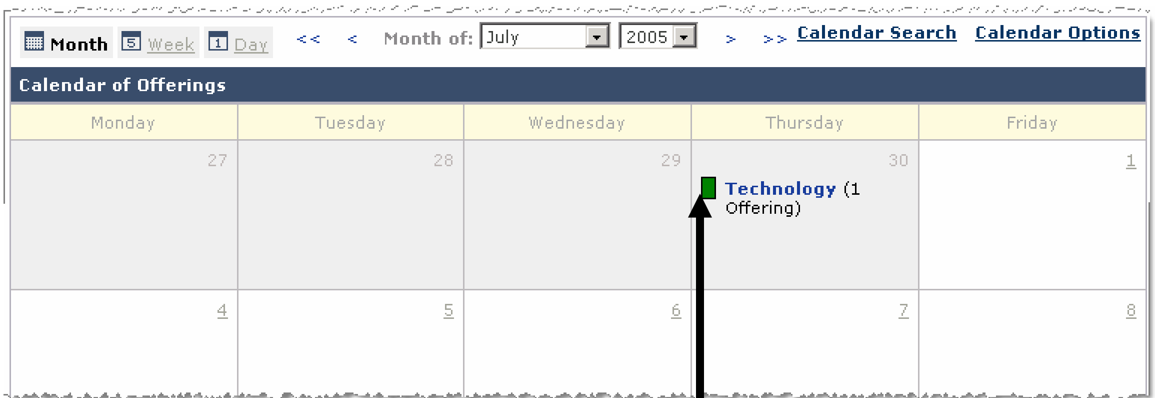
Calendar of Offerings

Search the Catalog by month, week, or day for Scheduled Offerings, and view them in an interactive Calendar.

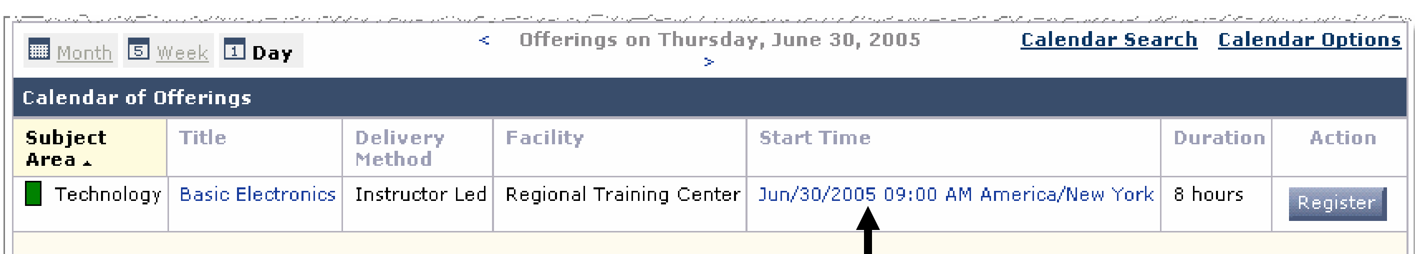


For each day in the month, the Calendar displays the number of Scheduled Offerings in each Subject Area that are scheduled for that day.

Each Subject Area may display in a specific color.

1. Click on the Subject Area to view the Scheduled Offerings.

The Scheduled Offering(s) for that day are listed by Subject Area. Scheduled Offerings may belong to more than one Subject Area.



Click on the Start Date and time to display the Segment details for the Scheduled Offering.

4. Identify the desired **Scheduled Offering**.

5. Click on the  button for the Item for which you want to register.

   To see more details about the Scheduled Offering, such as the complete class schedule, contact person, number of people enrolled, and cutoff date for registration click on the Start Date/Time text.

6. Enter any comments you have about your registration in the **Comments** text box (special needs, requirements, etc).

7. Verify the shipping information is correct. *Shipping information is only displayed if there are Materials such as pre-work or post-work associated with the Scheduled Offering.*

8. Click on the  button.

9. An on-screen **Registration** confirmation will be displayed, and an enrollment confirmation email will be sent to you and your supervisor.

Registering from the Learning Plan

You can register for Items on your Learning Plan that have Scheduled Offerings available. If the Item has available Scheduled Offerings, the Register option will display in the Action drop-down.

1. Locate the Item you wish to register for in the Learning Plan.

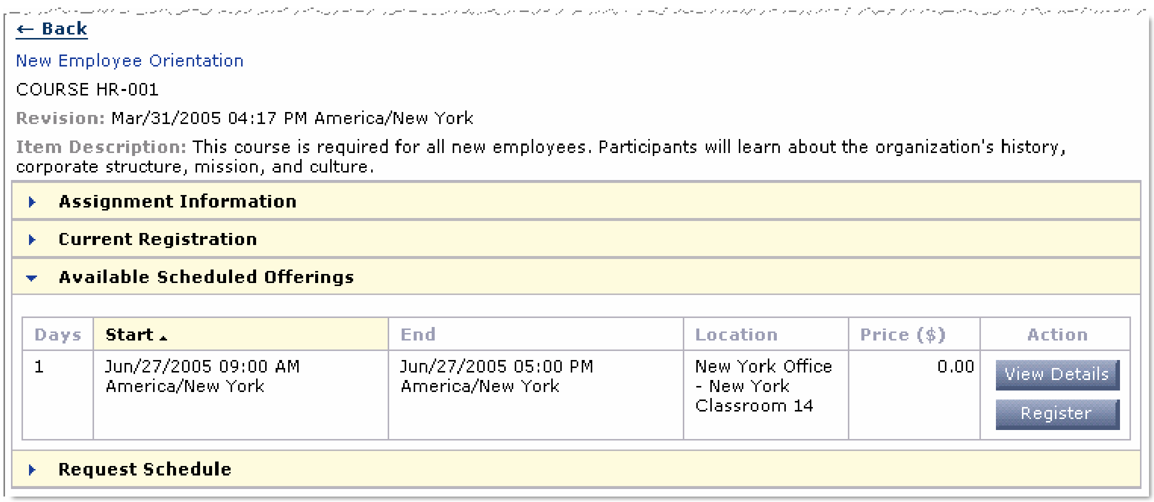
2. Click on the 

button.

3. Locate the Scheduled Offerings in the Available Scheduled Offerings section.

4. Click on the 

button to display the Segment information for the Scheduled Offering.



5. Click on the 

button for the Scheduled Offering for which you want to register.

6. Enter any comments you have about your registration in the **Comments** text box (special needs, requirements, etc).

7. Verify the shipping information is correct. *Shipping information is only displayed if there are Materials such as pre-work or post-work associated with the Scheduled Offering.*

8. Click on the Confirm button.

9. An on-screen **Registration** confirmation will be displayed, and an enrollment confirmation email will be sent to you and your supervisor.

Viewing My Registrations

Once you are registered for a Scheduled Offering of an Item, you will be assigned one of the following Registration statuses:

- **Enrolled**
  A "seat" in the Scheduled Offering has been reserved for you.
- **Pending**
  You will be enrolled once your supervisor approves the registration.
- **Waitlisted**
  You are on a waitlist. If a seat in the class opens up, you will be enrolled.

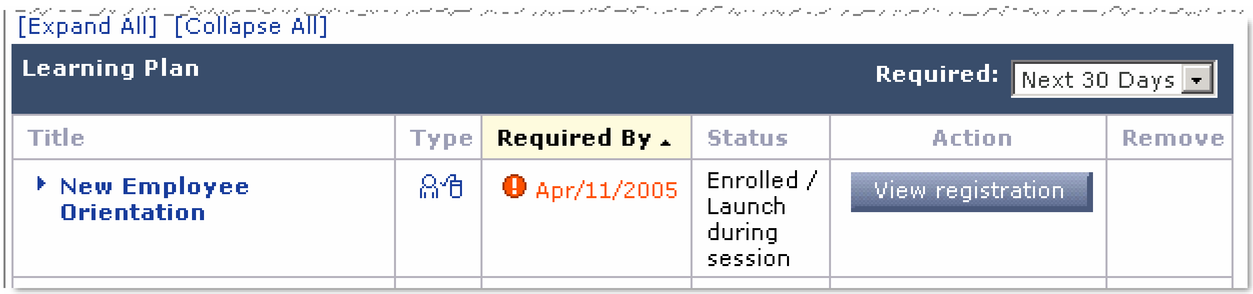
You can view your registrations from three places:

- **The Learning Plan**
  Items for which you have registered display a Registration Status in the Status column
- **Current Registrations**
  A list of all Scheduled Offerings for which you have a registration status.
- **Learning Calendar**
  A Calendar view of all of the Scheduled Offerings in which you are enrolled.

From the Learning Plan

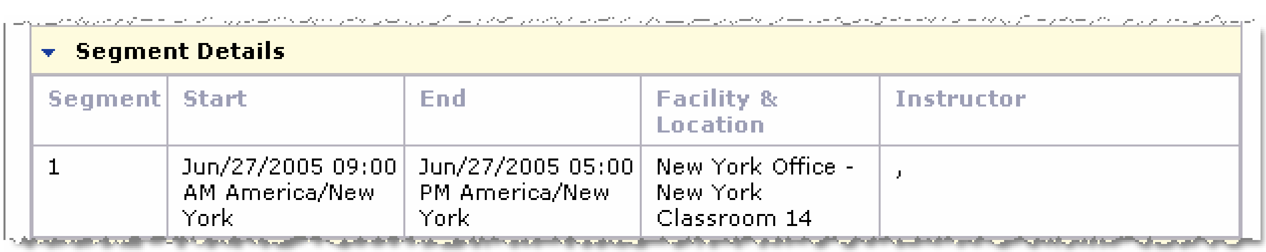
The Learning Plan displays your Registration Status in the Status column for Items for which you have registered.

1. Click on the View registration button in the Action column to view details about the Scheduled Offering for which you are registered.



2. Click on the View Details button in the Action column.

The Scheduled Offering is divided into units of time called **Segments**, and the class resources (instructor, facility, location) may change per Segment. The Segments are listed with their start and end times. If they have been assigned, the facility, locations, and instructors are also displayed for each segment.



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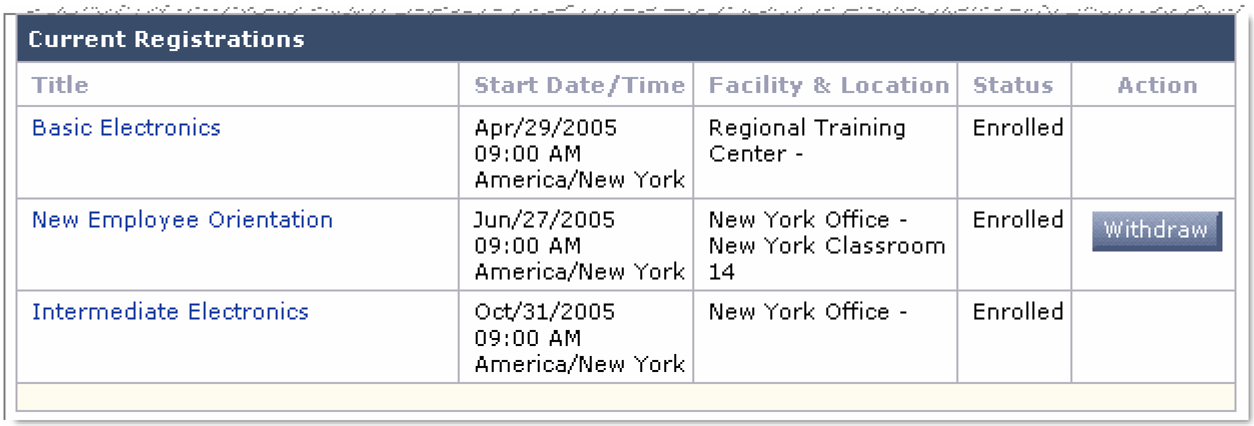
From Current Registrations

1. Select **Learning → Current Registrations** from the top menu bar.

   The Current Registrations page displays the Item Title, and the Scheduled Offering's Start Date and Start Time, Facility and Location, and your Registration Status.



Current Registrations

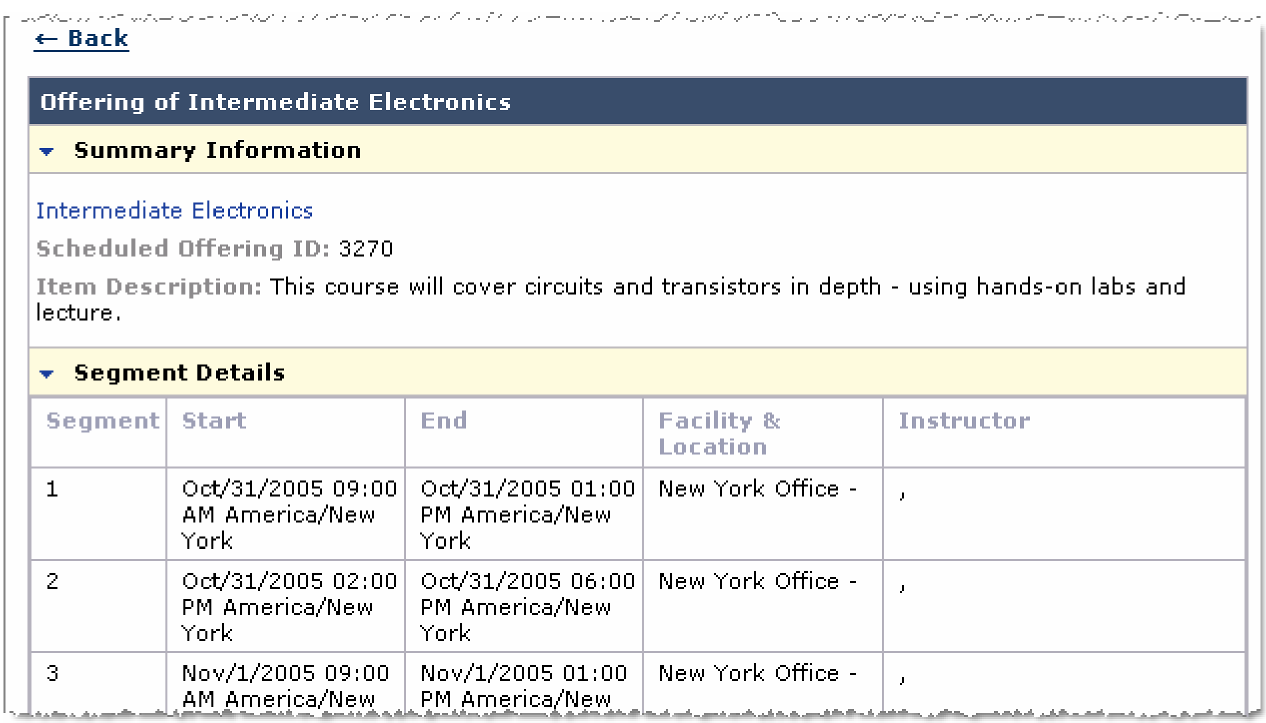
Title	Start Date/Time	Facility & Location	Status	Action
Basic Electronics	Apr/29/2005 09:00 AM America/New York	Regional Training Center -	Enrolled	
New Employee Orientation	Jun/27/2005 09:00 AM America/New York	New York Office - New York Classroom 14	Enrolled	Withdraw
Intermediate Electronics	Oct/31/2005 09:00 AM America/New York	New York Office -	Enrolled	

   For those Scheduled Offerings in which you self-registered, you can **withdraw**.

2. Click on the **Title** to view the Segment Details for the Scheduled Offering.

   The information includes the start and end date, start and end time, facility, location, and Instructor for each segment.

   To return to the previous screen, click on the **←Back** link.



← Back

Offering of Intermediate Electronics

Summary Information

Intermediate Electronics

Scheduled Offering ID: 3270

Item Description: This course will cover circuits and transistors in depth - using hands-on labs and lecture.

Segment Details

Segment	Start	End	Facility & Location	Instructor
1	Oct/31/2005 09:00 AM America/New York	Oct/31/2005 01:00 PM America/New York	New York Office -	,
2	Oct/31/2005 02:00 PM America/New York	Oct/31/2005 06:00 PM America/New York	New York Office -	,
3	Nov/1/2005 09:00 AM America/New	Nov/1/2005 01:00 PM America/New	New York Office -	,

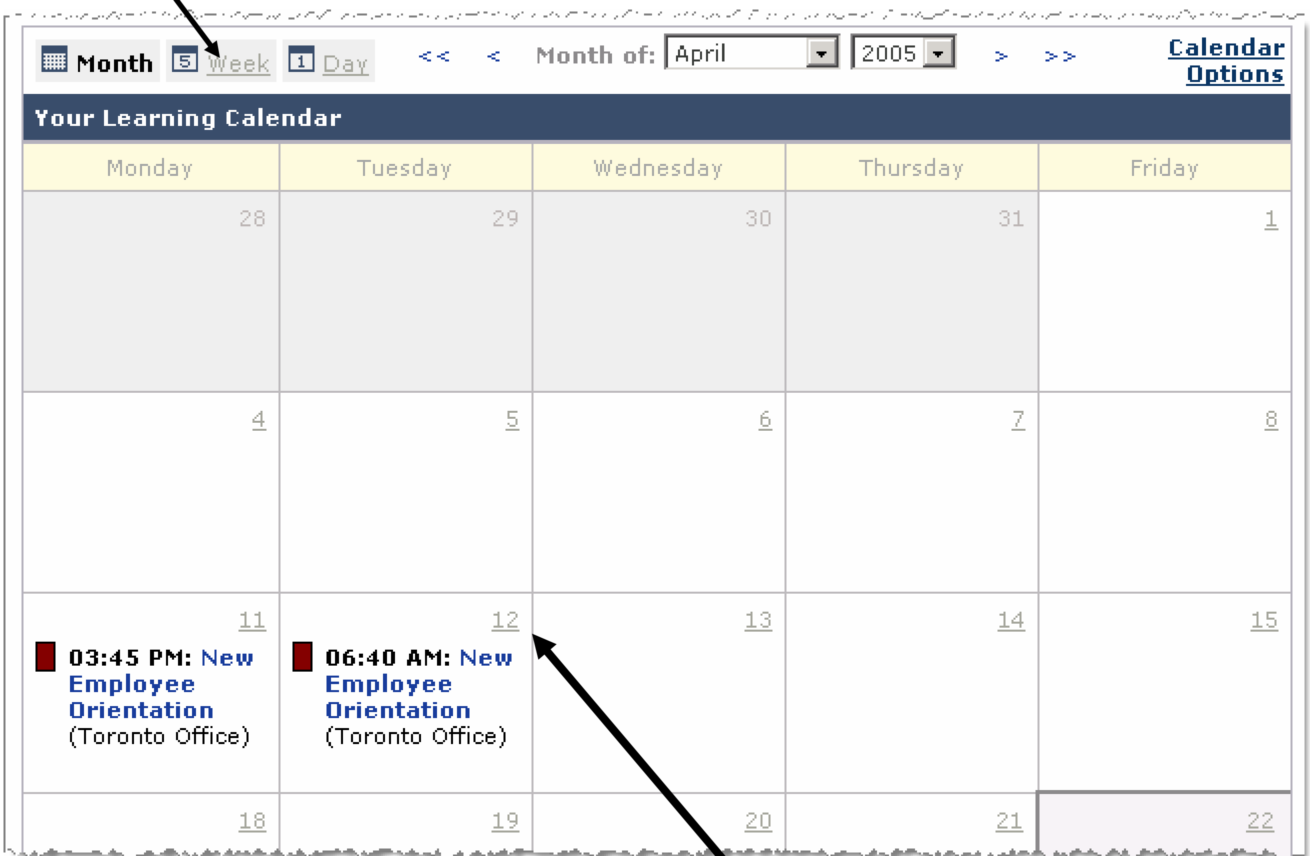
From the Learning Calendar

Select **Learning → Learning Calendar** from the top menu bar.

The Learning Calendar gives you the option to display your enrollments in a monthly, weekly, or daily view.

Monthly View

The Calendar below is the monthly view. You can switch to a weekly view by clicking on the Week link.

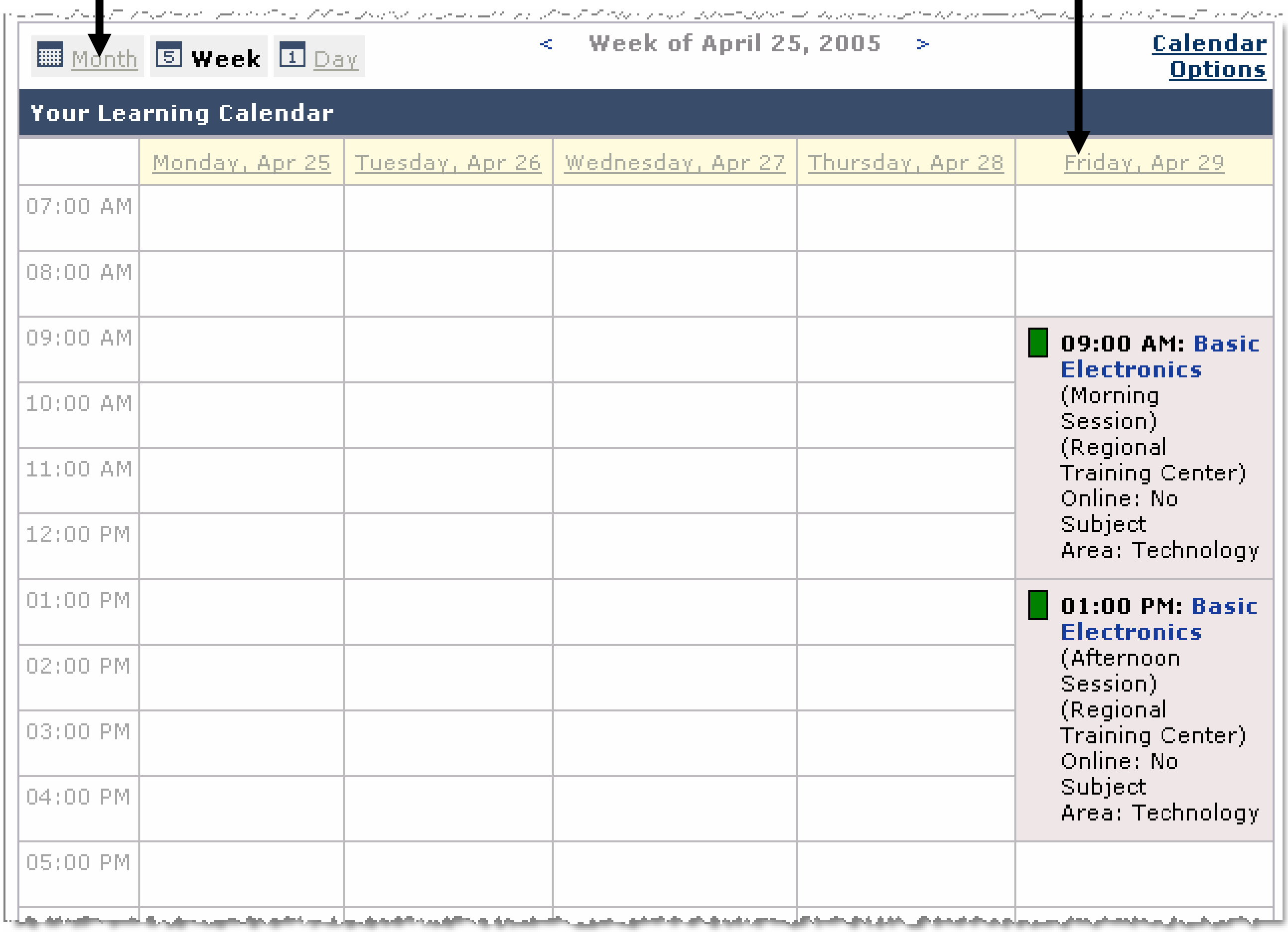


Click on a day to display the Day view of the Calendar.

Weekly View

The Calendar below is the weekly view. You can switch to a daily view by clicking on a day of the week.

Return to monthly view by clicking on the Month link.



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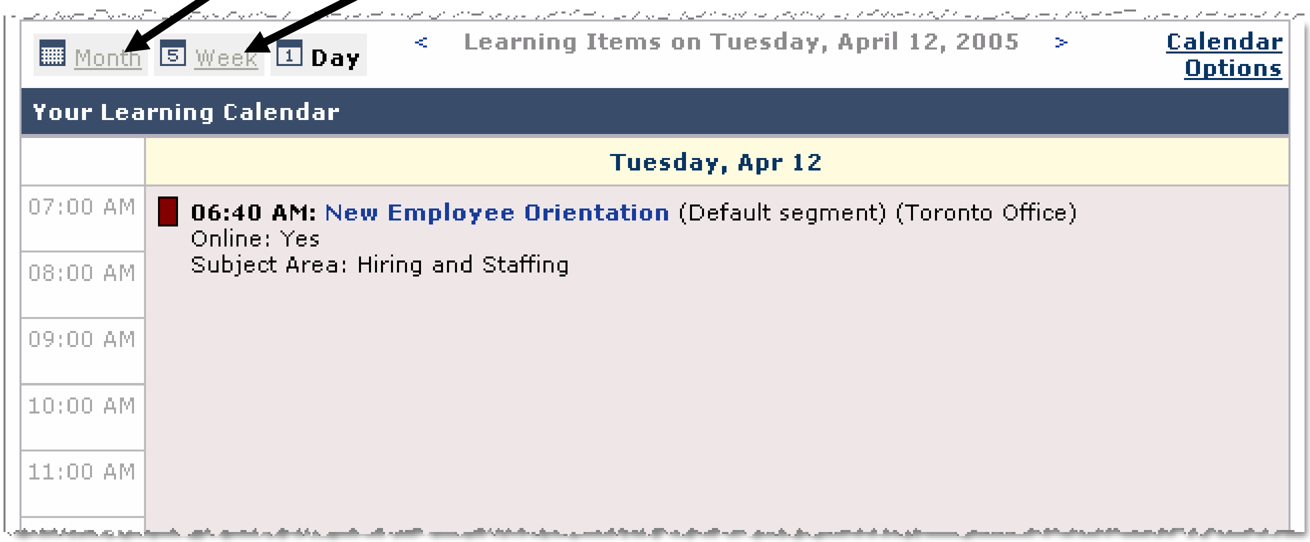
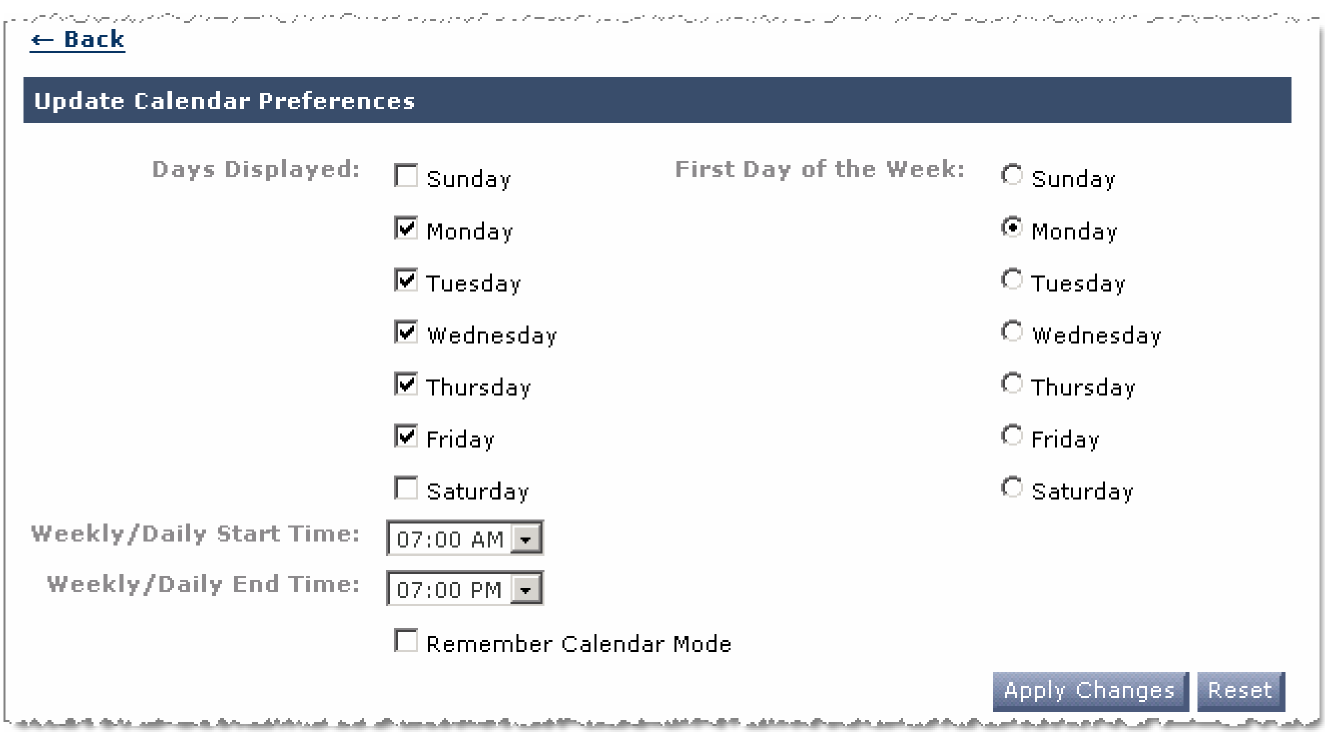
Daily View

Click on the **Monthly View** or **Weekly View** links to return to a previous view mode.



Editing the Calendar Display Mode

Click on the **Calendar Options** link on any Calendar page to edit and save your Calendar display mode preference. Check the Remember Calendar Mode checkbox if you want the Calendar to "remember" the mode in which you viewed the Calendar (Month, Week, Day).



Approving Enrollments / Online Items

There are two kinds of actions that you can be asked to approve:

- **Scheduled Offerings**
  Sometimes Scheduled Offerings require one or more people to approve learner self-registrations.

- **On-line Item**
  Sometimes Online Items require one or more people to approve before a Learner can launch the online content.

  When the learner submits the request, an email notification gets sent to the approver(s) notifying them of the requested approval.

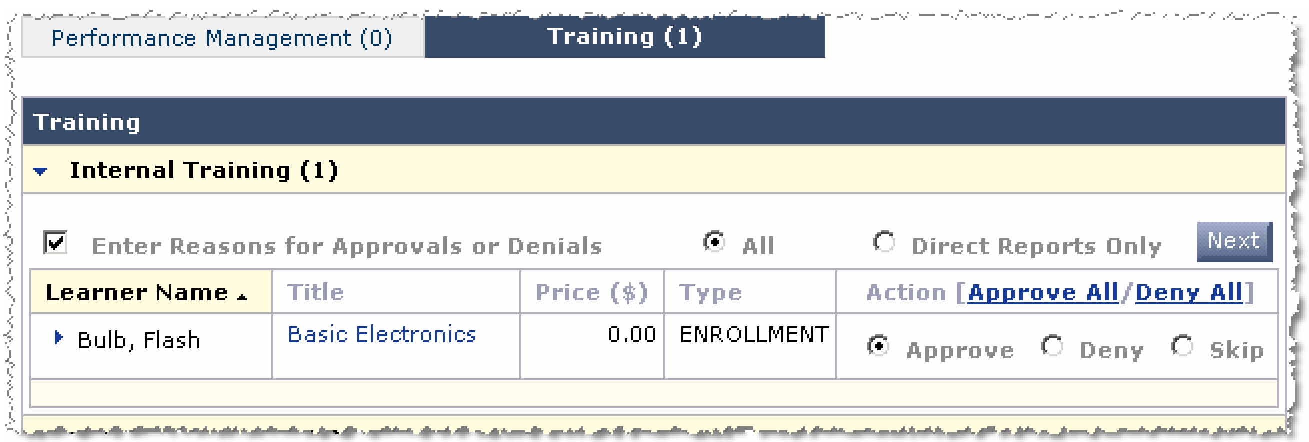
When a request is submitted to you, your Home page will display an alert that you have requests pending your approval. Click on the **<u>You have learner training approvals</u>** link to open the approval tool, or follow the instruction below.

1. Select **Personal → Approvals** from the top menu.

2. Verify the **Enter Reasons for Approvals or Denials** checkbox is checked.

   Uncheck this box if you do not want to enter a reason and have that reason emailed to the Learner.

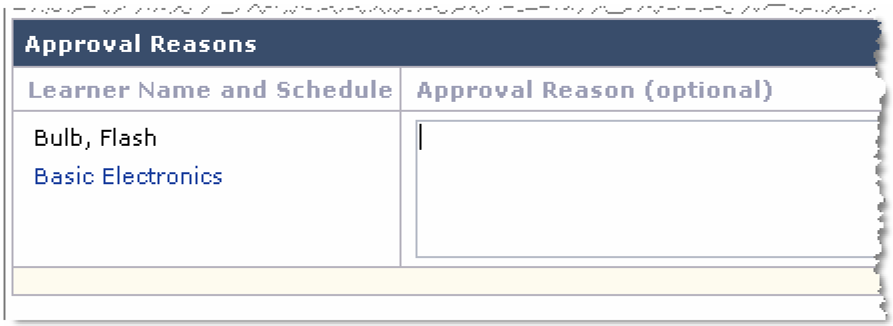
3. Select **Approve**, **Deny**, or **Skip** for each submitted enrollment request.



Observe that you can filter your list to view only requests from Direct Reports (if you are a supervisor). You can also click on the ▸ to view the details about the request, including any comments the Learner may have entered.

4. Click on the Next button.

5. Enter a reason for your decision.



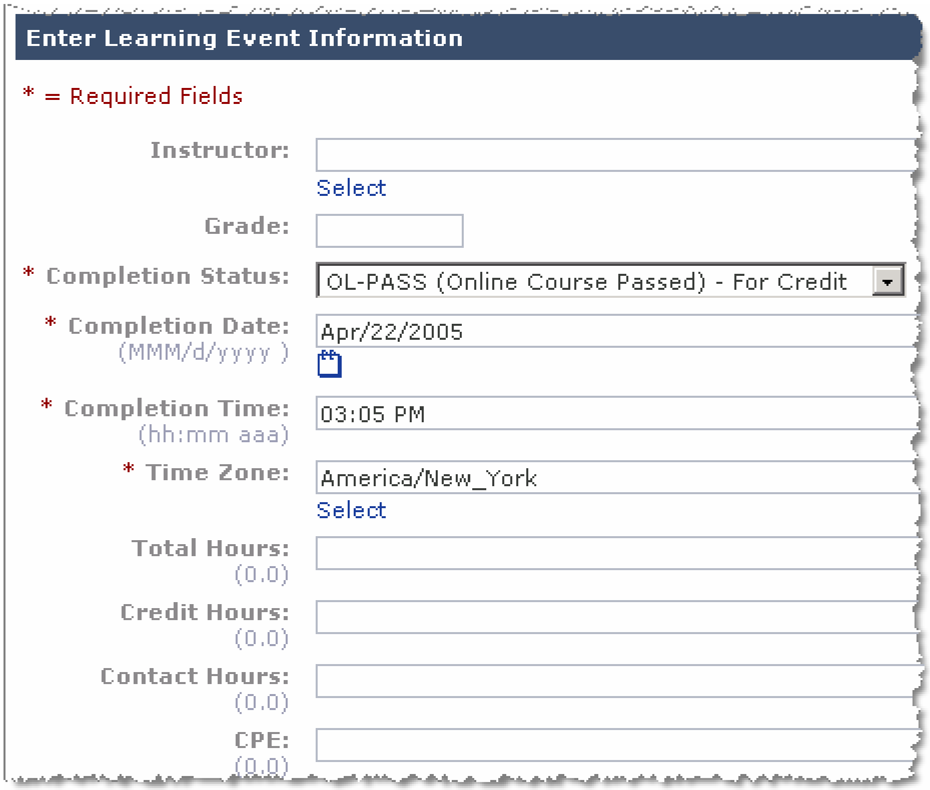
6. Click on the Next button.

7. Click on the Confirm button.

An approved registration means the learner will be enrolled in the Offering if there is an available seat.

6. Complete the required information.

7. Click on the Next button.



8. Enter any comments as needed, and click on the Next button.

9. Click on the Finish button.

Viewing My Learning History

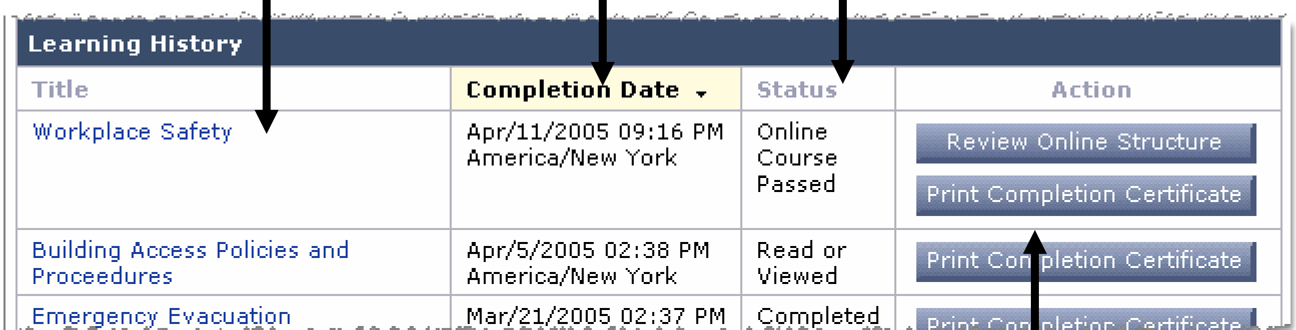
Any time you attempt completion or successfully complete an assigned Component, a learning event must get recorded. The learning event is a record of the date and time of your attempt to complete the learning, the completion status, the Item ID and Title, the instructor and grade, if applicable.

Select **Learning → Learning History** from the top men bar.

Click on the Item **Title** to view a complete description of the Item.

Completion Date and **Time**

Completion Status
The status assigned to your learning event.



Print Completion Certificate
You can print your own certificate of completion for any Item you successfully completed.

My Competencies

A Competency is a measurable capability that is required or recommended for effective performance. Organizations often come up with a list of Competencies for which they want employees to be able to demonstrate a specified level of mastery.

Viewing My Assigned Competencies

Click on **Career → Competency Assignments** in the top menu bar.

Free-floating Competencies are Competencies assigned directly to you, and are not part of a defined group of Competencies.

Free-Floating Competencies

Type	Competency	Gap	Assessed	Required	Action
Ability	Organize and express ideas clearly orally and in writing	-1.00		1	Assign Related Items

Viewing Grouped Competencies (Competency Profiles)

Some Competencies are meaningfully grouped so that they can be assigned and tracked as a single unit. These groups of Competencies are called **Competency Profiles**.

Competency Profiles with Associated Competencies

Competency Profile	Assigned Date
Electrical Engineers	Apr/22/2005

Type	Competency	Gap	Assessed	Required	Action
Knowledge	Computers and Electronics	-3.00		3	Assign Related Items
Knowledge	Engineering and Technology	-3.00		3	Assign Related Items
Knowledge	Physics	-3.00		3	Assign Related Items
Skill	Programming	-3.00		3	Assign Related Items
Skill	Systems Analysis	-3.00		3	Assign Related Items
Skill	Technology Design	-3.00		3	Assign Related Items
Skill	Troubleshooting	-3.00		3	Assign Related Items

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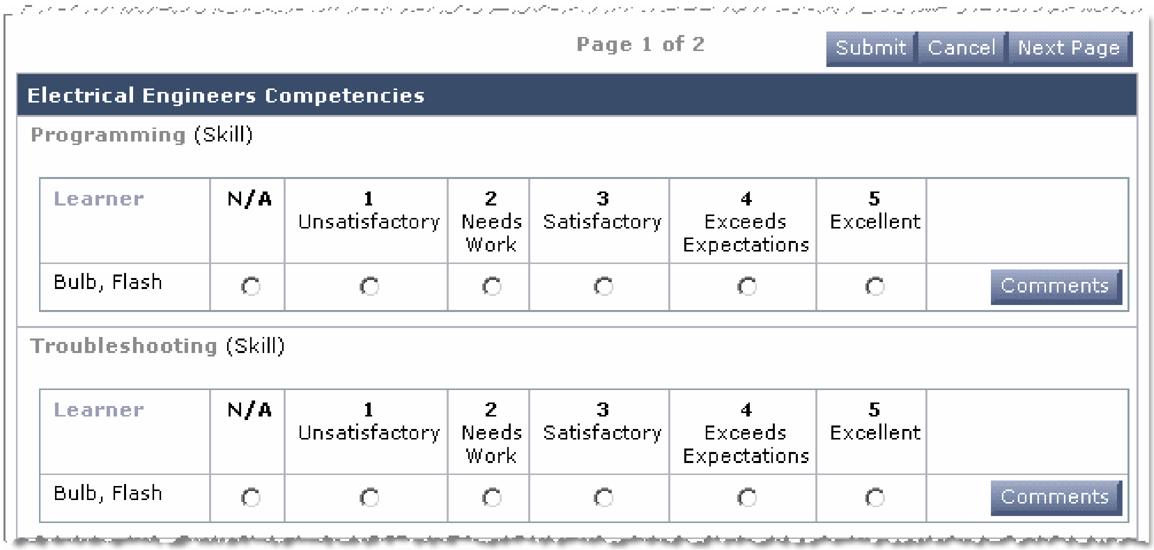
Recording a Self Assessment

1. Click on **Career → Assessment History** in the top menu bar.

2. Click on the Add Assessment button at the bottom of the Assessment History.



3. Rate each Competency as needed (you can skip Competencies).

4. Click on the Submit button.

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Running Reports

You can generate reports about your learning record.

1. Click on **Reports** in the top menu bar.

2. Click on a Report Name to open the report.

   If you are not sure what the reports do, open Help for the reports section. The Help will display details about each report.

Report Name
Curriculum Status
Individual Development Plan
Item Requests
Item Status
Learner Information
Learning History
Learning Hours
Learning Needs
Learning Plan
Tuition

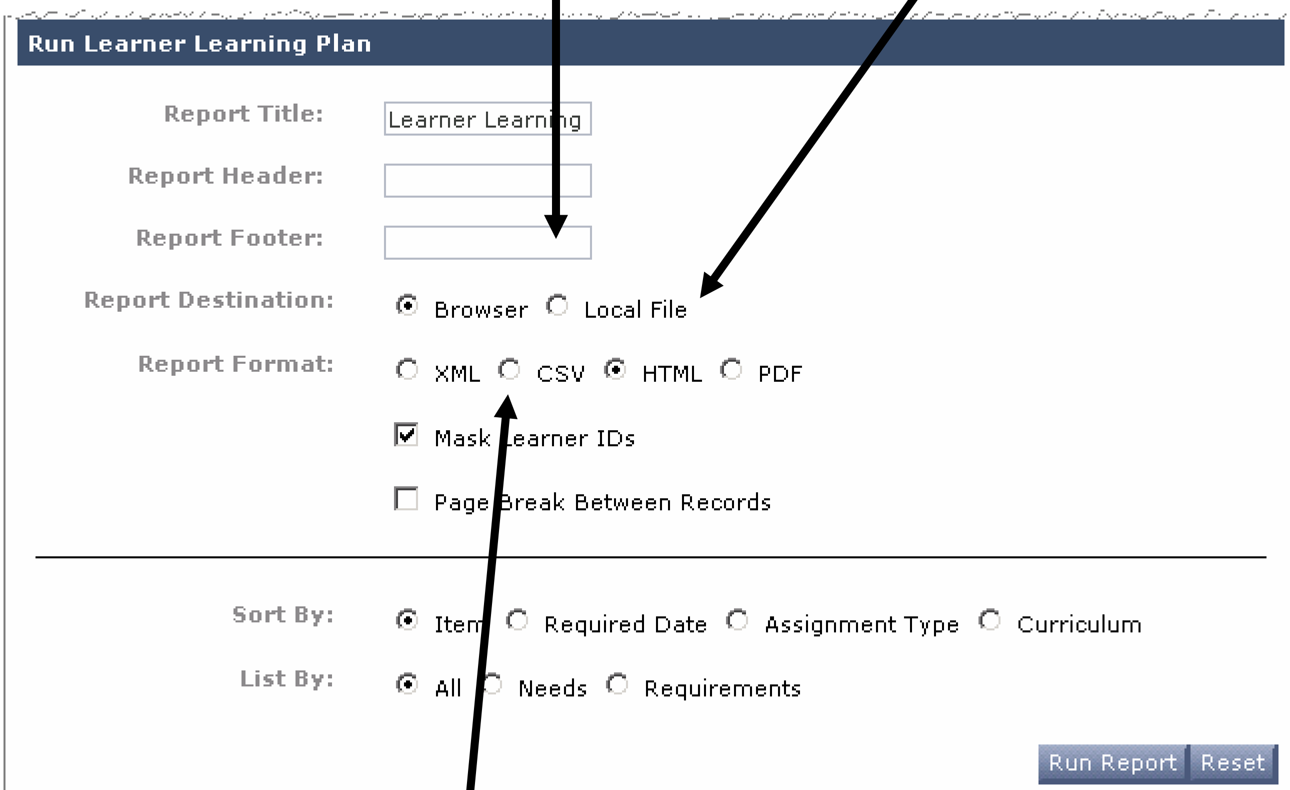
3. Set up your report (see the image on the next page).

4. Click on the Run Report button.

If you are a supervisor, you have the option of running reports that include your subordinates. Supervisors are hierarchical; you can run reports on your direct reports, or all of your subordinates.

Report Destination
Choose Browser to generate the report in the same browser window.

Choose Local File to generate the report to a new window or to save it to as a local file.



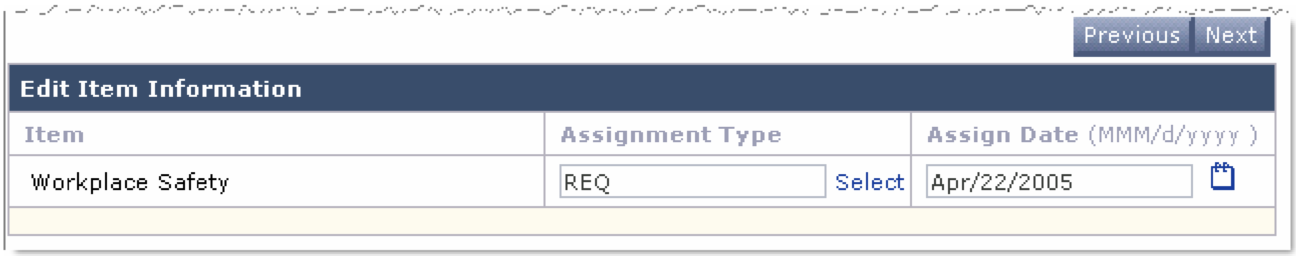
CSV files can be opened in Microsoft Excel.

12. Verify your selections and click on the Next button.

13. Edit the **Assignment Type** as needed. You can choose from a list of types by clicking on the Select link.

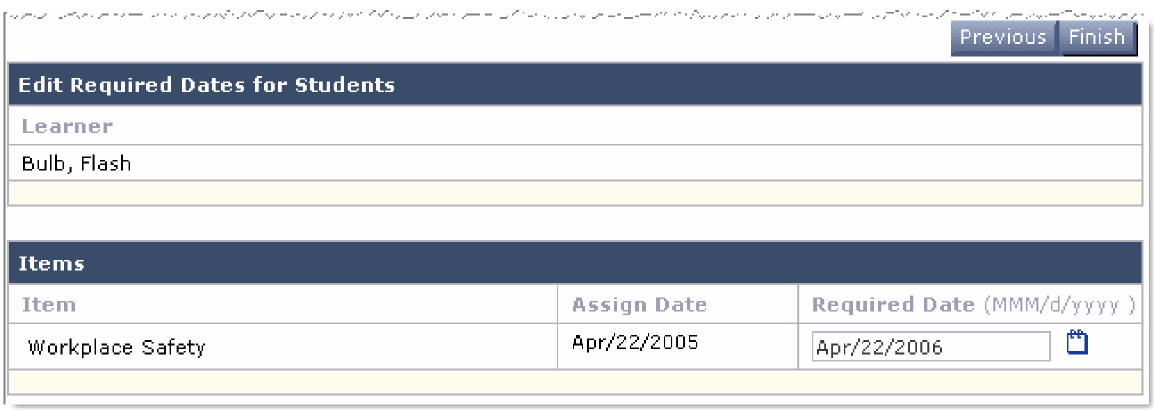
14. Edit the **Assign Date** as needed. This date cannot be in the future, and will default to the current date.

15. Click on the Next button.



16. Edit the **Required Date** (due date) for each Item as needed. Some have settings on the Item record that will affect the default, so you may see different default Required Dates for each Item.

17. Click on the Finish button.



18. If you desire to add or remove more Items to the Learners shown in the previous screen, click on the Start Over... button to keep the same list of learners, and start over.

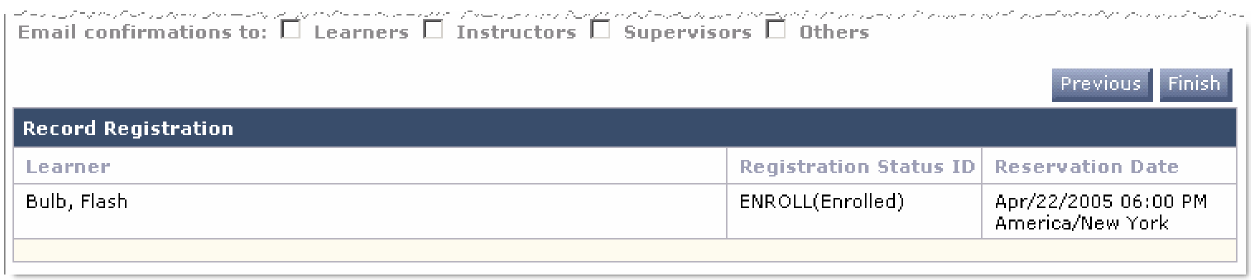
11. Click on the Next button.

12. If there is a price associated with the Scheduled Offering, edit the Account Code field as needed in order to indicate payment.

13. Click on the Next button.

14. Check the **Email confirmation** checkboxes for each recipient whom you want to receive an email notification about the enrollment.

15. Click on the Finish button.



PLATEAU

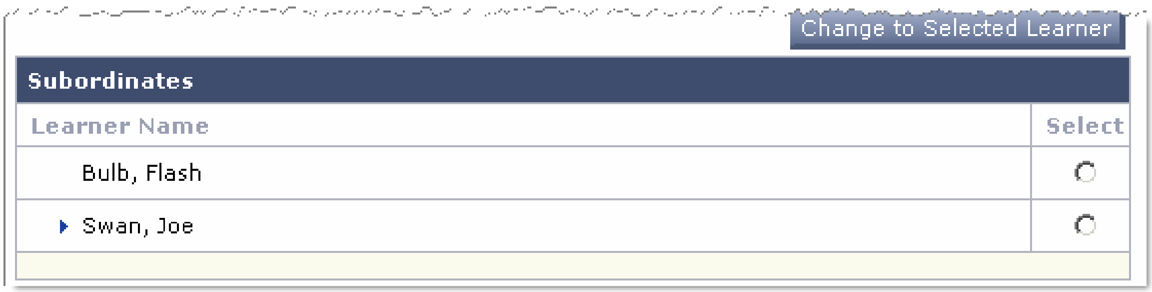
Opening a Subordinate's Record

As a supervisor you can open and view the records of your subordinates. This includes viewing the Learning Plan, Curriculum Status, Registrations, and Learning History.

1. Select **My Employees → Subordinates** from the top menu.

2. Select one learner whose record you want to view.

3. Click on the Change to Selected Learner button.



Now that you have the record open, observe the top menu bar. It shows the name of the learner whose record you are viewing.

To return to your own record, click on the **Return to your records** link.

Viewing Your Communities

1. Select **Personal → My Communities** from the top menu bar.

   The list of Communities displays the Community Title and Type, and the subject of the Topic most recently posted to for each Community.

   The Title column may display symbols:

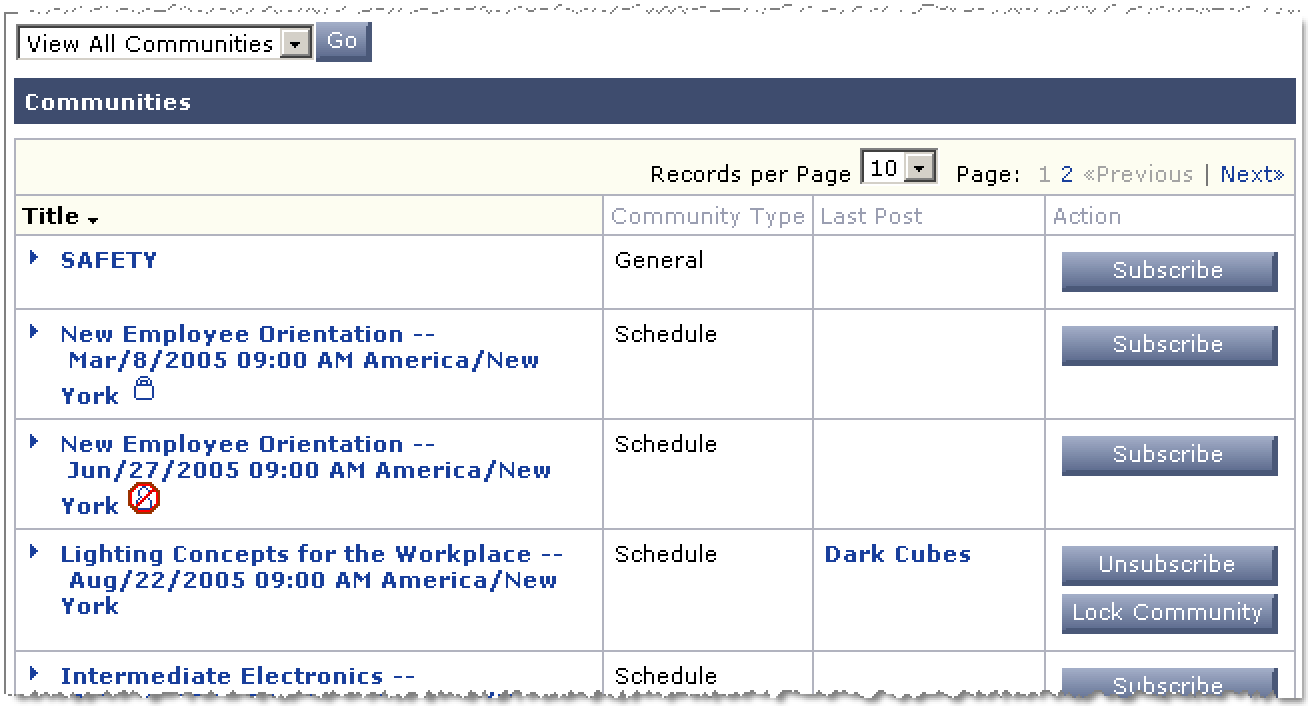
	The Community is locked, and cannot have new posts or replies. The Community is view-only.
	You have been banned from participating in the Community; you have view-only access. Moderators can ban any Learner from posting to a Community.

2. Click on the **Community Title** to open the Community.

PLATEAU

Subscribing to a Community

When you open the My Communities page, you are viewing your list of subscribed Communities. Subscribing to a Community puts the Community on this list so that you do not have to search for it in the list of all Communities, which could be very time consuming.



1. Locate the **Community** to which you want to subscribe.

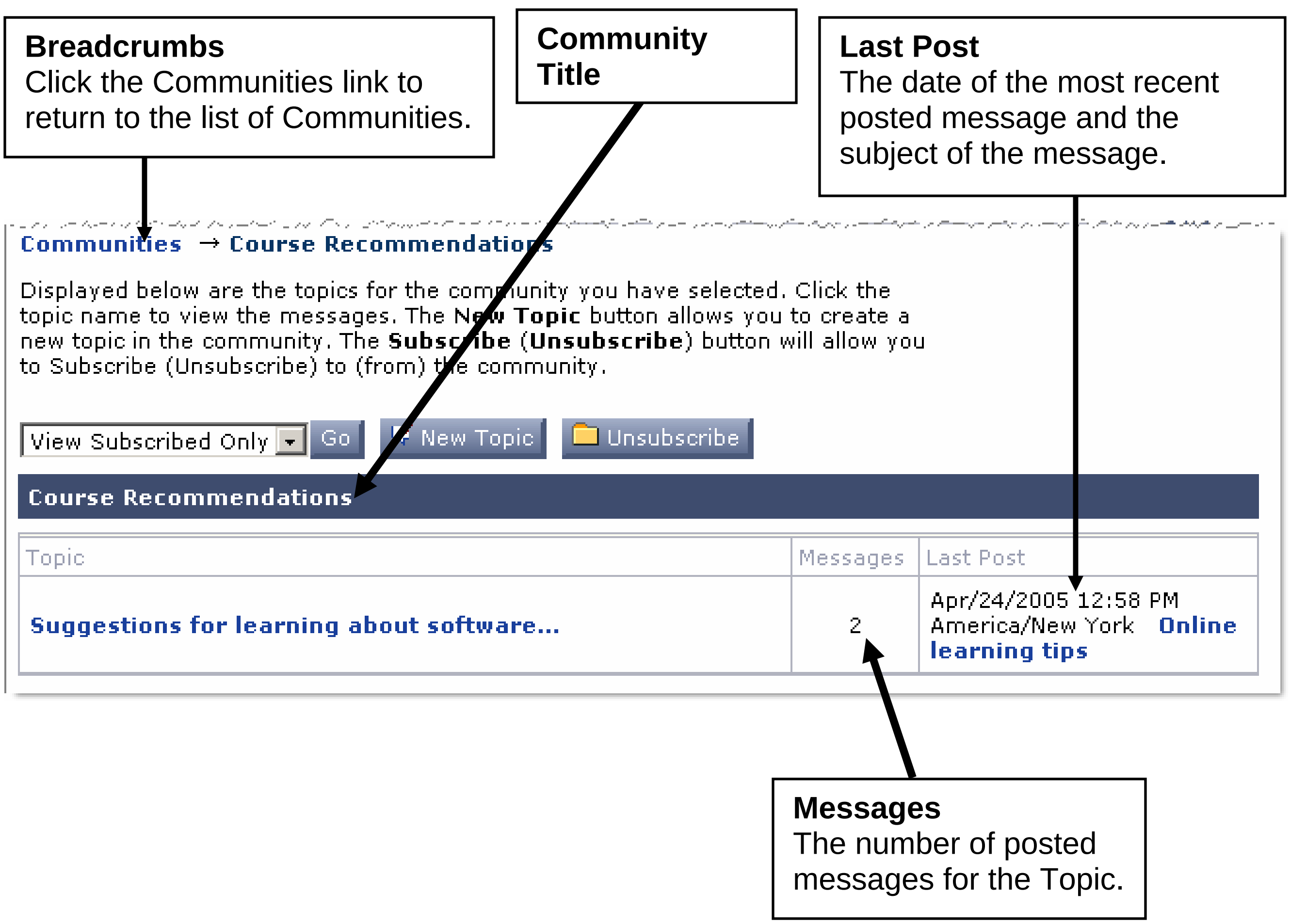
2. Click on the Subscribe button in the Action column.

Participating in a Community

You may participate in any Community listed unless you have been banned from a Community, or a Community has been locked. You do not have to be subscribed to a Community to post a message or reply to a topic.

Viewing a Topic

Once you have opened a Community, the Topics are listed. Click on a **Topic** to open the topic and read the posts.



PLATEAU

Post a Message or Reply

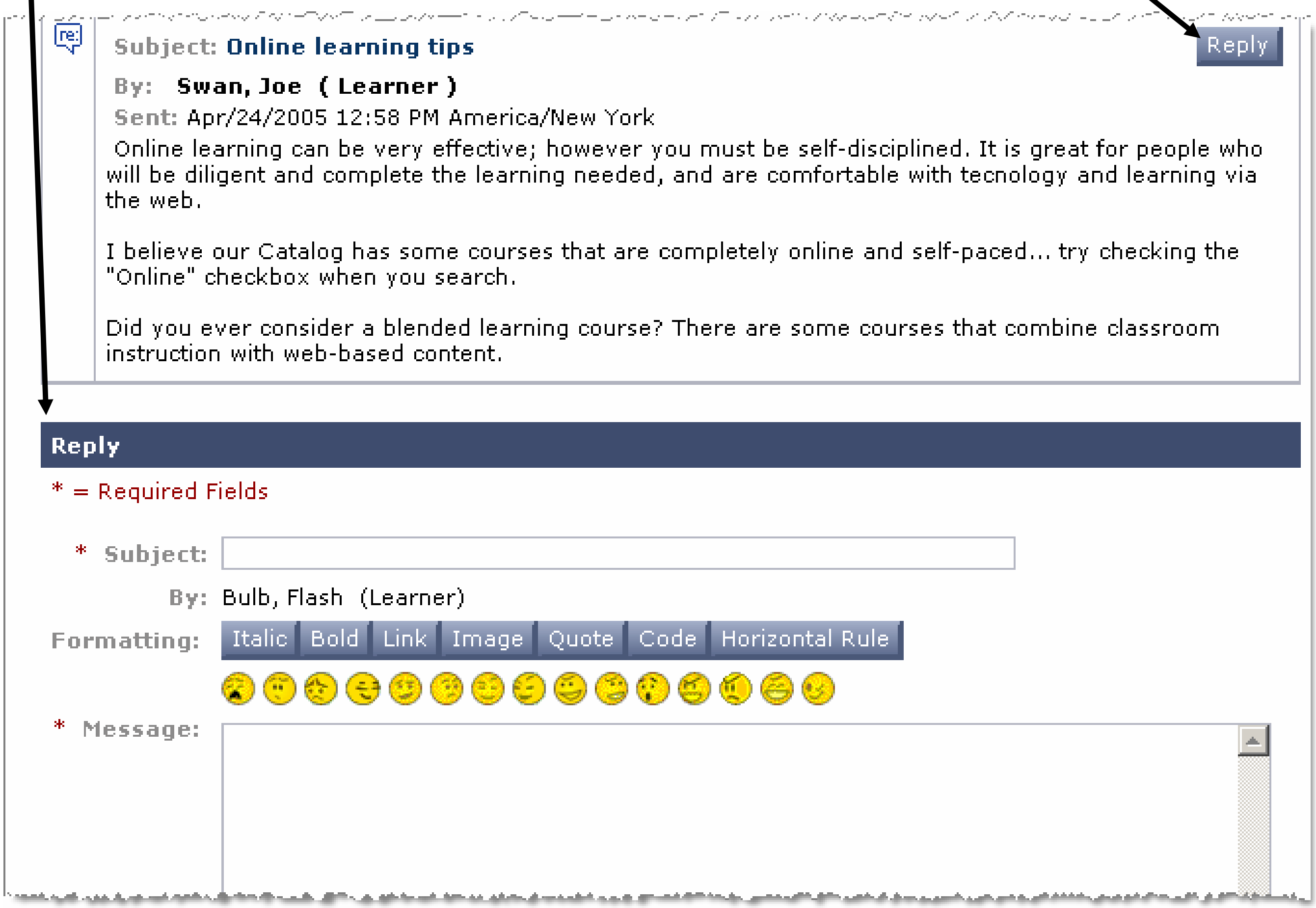
There are two options for posting a message to a Topic:

1. Post a Message to the Topic
Scroll to the bottom of the page and enter your message in the Reply section.

2. Reply to a Post
This option displays the body of the message to which you are replying in a yellow box at the bottom of your message.

1. Locate the specific message to which you want to reply.

2. Click on the Reply button.

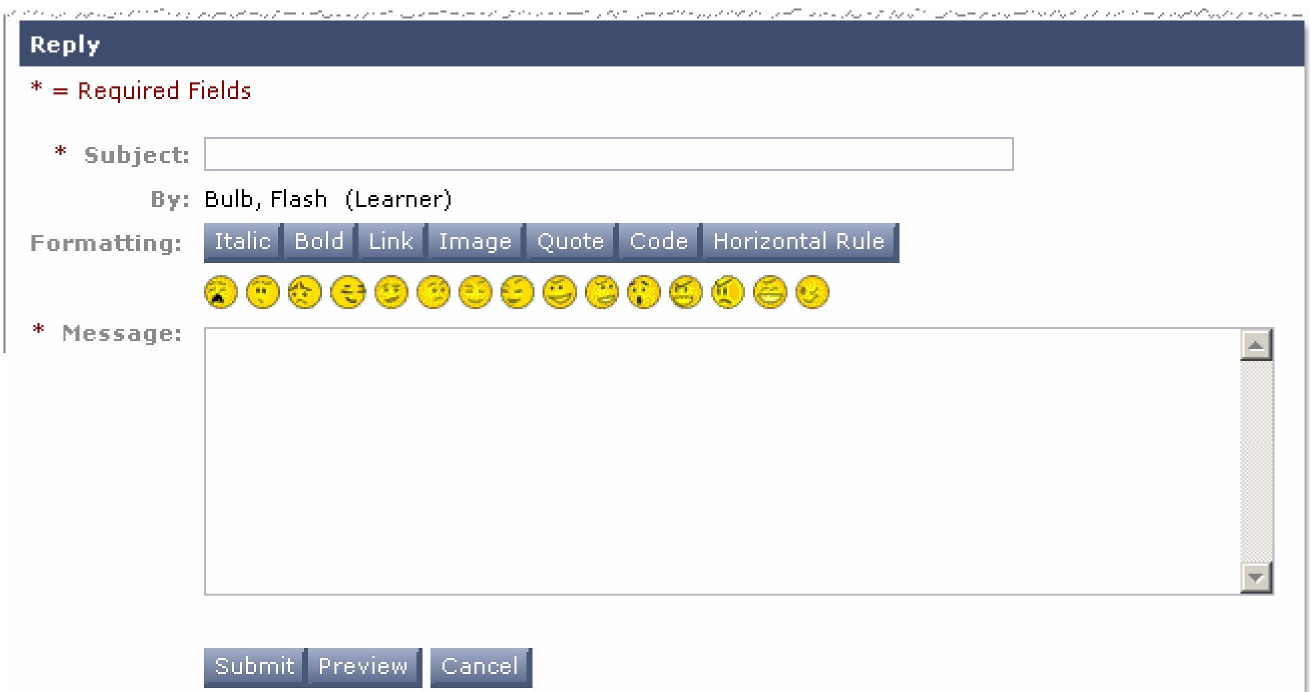


Writing Your Reply

You can format the look of your reply to reflect your attitude and opinions.

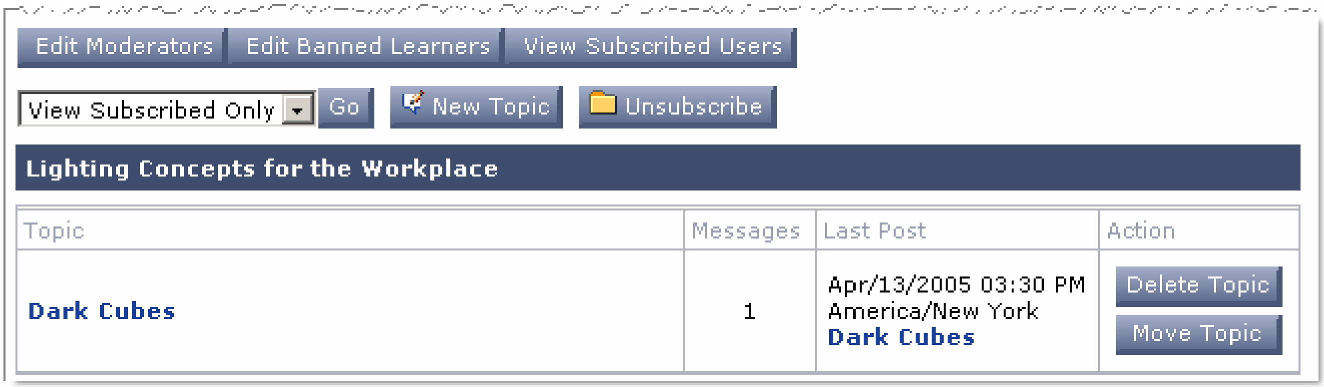
1. Enter a **Subject** for your message.
2. Enter the **Body** of your message.
   See the Formatting Your Message section to read about the Formatting options.
3. Click on the Preview button to see a Preview of your message.
4. Click on the Submit button to submit your final message.

NOTE: You cannot edit or remove the message once you've posted it. Only a moderator can edit posted messages.



Moderating a Community

Some Learners can be designated as Moderators for a Community. As a Moderator you can edit the Community settings in addition to posting replies and new topics.



Locking a Community

Click on the Lock Community button to allow Learners to read the Topics, but not to reply or post new Topics.

Adding and Removing Community Moderators

1. Open the Community.
2. Click on the Edit Moderators button to:

- Add Moderators
- Edit the Comments field for the Moderators
- Remove Moderators

Note: You can only add other Learners as moderators for the Community.

Banning Learners from the Community

You can block specific Learners from posting to the Community. Banned Learners can still access the Community, but only to view it.

1. Open the Community.
2. Click on the Edit Banned Learners button.

Changing My Password

You should change your password on a regular basis to prevent other people from logging in to your account. Your organization may enforce specific password procedures and schedules.

1. Select **Personal → Profile** in the top menu bar.

2. Scroll down the page until you see the Password link.

3. Click on the **Password** link

4. Enter the old password in the **Enter your old password** text box.

5. Enter the new password in the **Enter your new password** text box.

6. Enter the new password again in the **Verify your new password** text box.

7. Click on the **Apply Changes** button.