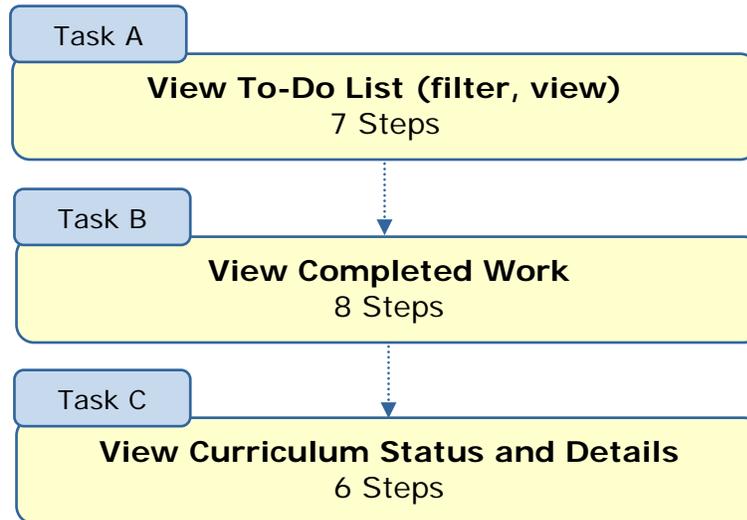


Job Aid: View User Records

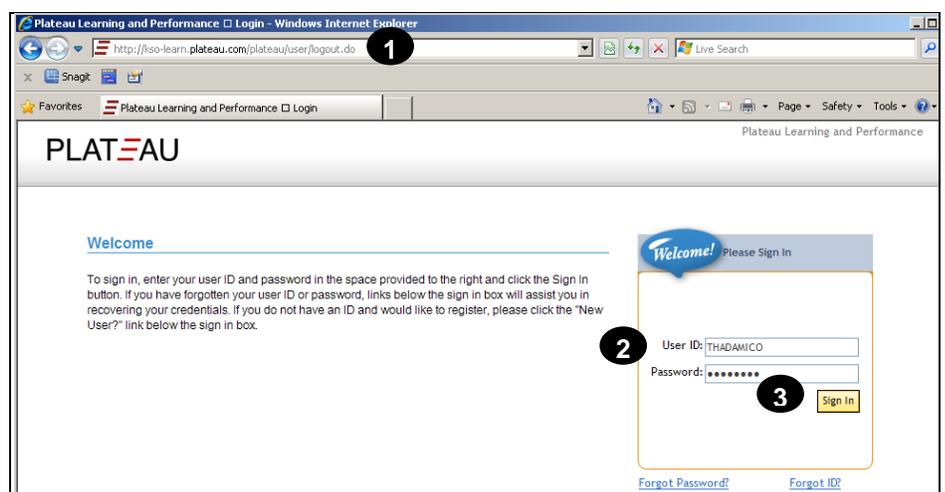
Purpose

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

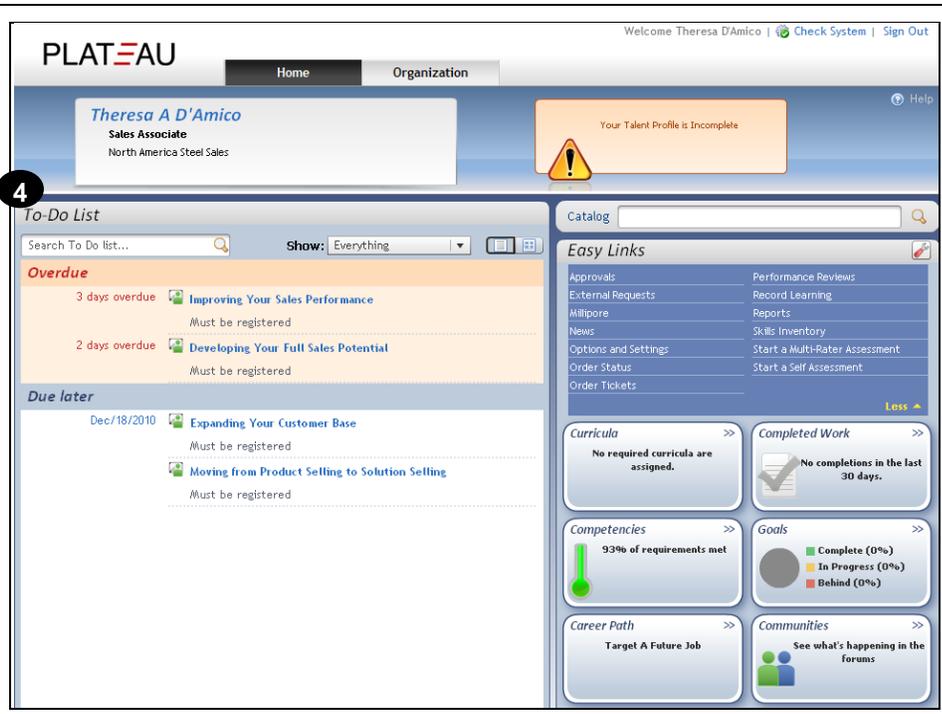
- 1 Enter the web address (URL) of the user application into your browser *Address* field and press the Enter key.
- 2 Enter your user ID in the **User ID** textbox.
Enter your password in the **Password** textbox.
- 3 Click **Sign In**.



4 On the Home page, view the To-Do List.

This panel displays a consolidated view of tasks requiring action. This means that all tasks are in one place.

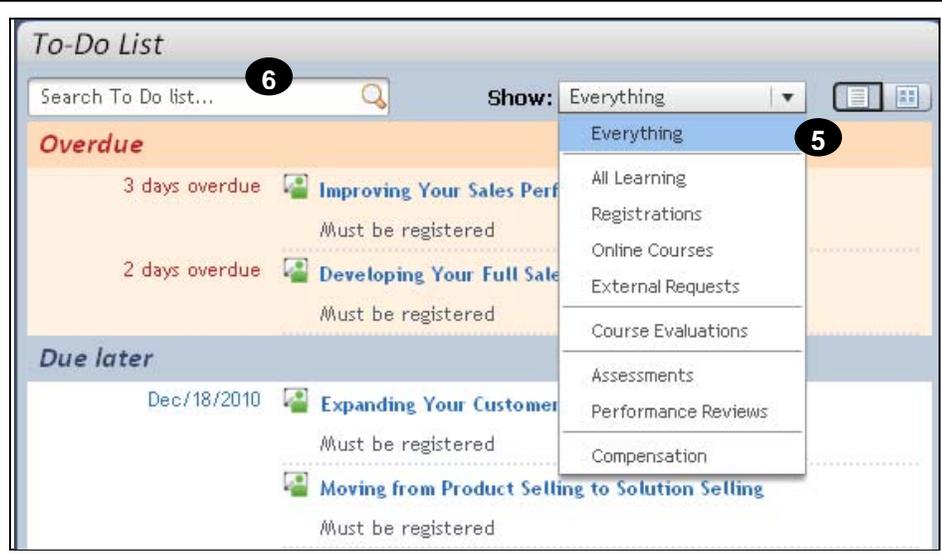
The To-Do List can be filtered and viewed in different ways.



5 Click the Show drop-down menu to select a filter option.

6 Enter text into the 'type ahead' search box to filter the To-Do List.

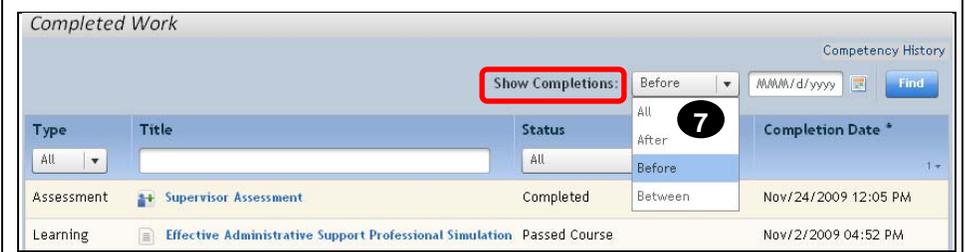
Note: Hover over each title in the To-Do List for additional information.



7 Users may prefer to display the To-Do List actions as a card view. Selecting the Card View () icon from the top left menu gives full details. The card view displays navigation links for each relevant action.

Task B. View Completed Work

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

<p>2 Completed Work displays a combined list of all tasks completed. It combines learning and performance activities such as courses, performance reviews, and competency assessments.</p> <p>2 Sort the table by selecting the column header. The table to the right is sorted by the <i>Completion Date</i>. The sort order arrow (1 ▲) indicates the column is sorted in ascending order.</p> <p>3 Click any column header to sort the display based on <i>Title</i>, <i>Status</i>, or <i>Completion Date</i>.</p>	 <p><i>Completed Work</i></p> <p>Competency History</p> <p>Show Completions: All ▼</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Title</th> <th>Status</th> <th>Completion Date</th> </tr> </thead> <tbody> <tr> <td>Assessment</td> <td>Supervisor Assessment</td> <td>Completed</td> <td>Nov/24/2009 12:05 PM</td> </tr> <tr> <td>Learning</td> <td>Effective Administrative Support Professional Simulation</td> <td>Passed Course</td> <td>Nov/2/2009 04:52 PM</td> </tr> <tr> <td>Learning</td> <td>Diebold Business Improvement System</td> <td>Collateral Credit</td> <td>Nov/2/2009 04:52 PM</td> </tr> <tr> <td>Assessment</td> <td>NA Sales 2007 Core Competencies</td> <td>Completed</td> <td>Jan/4/2007 01:32 PM</td> </tr> <tr> <td>Learning</td> <td>New Employee Orientation</td> <td>Passed Course</td> <td>Dec/1/2003 01:21 PM</td> </tr> </tbody> </table>	Type	Title	Status	Completion Date	Assessment	Supervisor Assessment	Completed	Nov/24/2009 12:05 PM	Learning	Effective Administrative Support Professional Simulation	Passed Course	Nov/2/2009 04:52 PM	Learning	Diebold Business Improvement System	Collateral Credit	Nov/2/2009 04:52 PM	Assessment	NA Sales 2007 Core Competencies	Completed	Jan/4/2007 01:32 PM	Learning	New Employee Orientation	Passed Course	Dec/1/2003 01:21 PM
Type	Title	Status	Completion Date																						
Assessment	Supervisor Assessment	Completed	Nov/24/2009 12:05 PM																						
Learning	Effective Administrative Support Professional Simulation	Passed Course	Nov/2/2009 04:52 PM																						
Learning	Diebold Business Improvement System	Collateral Credit	Nov/2/2009 04:52 PM																						
Assessment	NA Sales 2007 Core Competencies	Completed	Jan/4/2007 01:32 PM																						
Learning	New Employee Orientation	Passed Course	Dec/1/2003 01:21 PM																						
<p>4 The Completed Work list can be filtered by type by selecting from the Type column drop-down menu.</p> <p>5 Filter the table by title by using the 'type ahead' text entry box.</p> <p>6 Filter the table by status by selecting from the Status column drop-down menu.</p>	 <p><i>Completed Work</i></p> <p>Competency History</p> <p>Show Completions: All ▼</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Title</th> <th>Status</th> <th>Completion Date</th> </tr> </thead> <tbody> <tr> <td>Assessment</td> <td>Supervisor Assessment</td> <td>Completed</td> <td>Nov/24/2009 12:05 PM</td> </tr> <tr> <td>Learning</td> <td>Effective Administrative Support Professional Simulation</td> <td>Passed Course</td> <td>Nov/2/2009 04:52 PM</td> </tr> <tr> <td>Learning</td> <td>Diebold Business Improvement System</td> <td>Collateral Credit</td> <td>Nov/2/2009 04:52 PM</td> </tr> <tr> <td>Assessment</td> <td>NA Sales 2007 Core Competencies</td> <td>Completed</td> <td>Jan/4/2007 01:32 PM</td> </tr> <tr> <td>Learning</td> <td>New Employee Orientation</td> <td>Passed Course</td> <td>Dec/1/2003 01:21 PM</td> </tr> </tbody> </table> <p><i>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.</i></p>	Type	Title	Status	Completion Date	Assessment	Supervisor Assessment	Completed	Nov/24/2009 12:05 PM	Learning	Effective Administrative Support Professional Simulation	Passed Course	Nov/2/2009 04:52 PM	Learning	Diebold Business Improvement System	Collateral Credit	Nov/2/2009 04:52 PM	Assessment	NA Sales 2007 Core Competencies	Completed	Jan/4/2007 01:32 PM	Learning	New Employee Orientation	Passed Course	Dec/1/2003 01:21 PM
Type	Title	Status	Completion Date																						
Assessment	Supervisor Assessment	Completed	Nov/24/2009 12:05 PM																						
Learning	Effective Administrative Support Professional Simulation	Passed Course	Nov/2/2009 04:52 PM																						
Learning	Diebold Business Improvement System	Collateral Credit	Nov/2/2009 04:52 PM																						
Assessment	NA Sales 2007 Core Competencies	Completed	Jan/4/2007 01:32 PM																						
Learning	New Employee Orientation	Passed Course	Dec/1/2003 01:21 PM																						
<p>7 Filter the table by completion date by using the <i>Show Completions</i> drop-down options to show only completions <i>after</i>, <i>before</i>, or <i>between</i> selected dates.</p>	 <p><i>Completed Work</i></p> <p>Competency History</p> <p>Show Completions: Before ▼</p> <p>Find</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Title</th> <th>Status</th> <th>Completion Date</th> </tr> </thead> <tbody> <tr> <td>Assessment</td> <td>Supervisor Assessment</td> <td>Completed</td> <td>Nov/24/2009 12:05 PM</td> </tr> <tr> <td>Learning</td> <td>Effective Administrative Support Professional Simulation</td> <td>Passed Course</td> <td>Nov/2/2009 04:52 PM</td> </tr> </tbody> </table>	Type	Title	Status	Completion Date	Assessment	Supervisor Assessment	Completed	Nov/24/2009 12:05 PM	Learning	Effective Administrative Support Professional Simulation	Passed Course	Nov/2/2009 04:52 PM												
Type	Title	Status	Completion Date																						
Assessment	Supervisor Assessment	Completed	Nov/24/2009 12:05 PM																						
Learning	Effective Administrative Support Professional Simulation	Passed Course	Nov/2/2009 04:52 PM																						

8 The user can select the title link and choose a desired option (View Details or Print Certificate, for this example).

Type	Title	Status	Completion Date *
Assessment	Supervisor Assessment	Completed	Nov/24/2009 12:05 PM
Learning	Effective Adm...		Nov/2/2009 04:52 PM
Learning	Diebold Business I		Nov/2/2009 04:52 PM
Assessment	NA Sales 2007 Cor		Jan/4/2007 01:32 PM
Learning	New Employee On		Dec/1/2003 01:21 PM

Task C. View Curriculum Status and Details

1 On the Home page, click the Curricula pod.

Welcome Theresa D'Amico | Check System | Sign Out

Theresa A D'Amico
Sales Associate
North America Steel Sales

Your Talent Profile is Incomplete

To-Do List

Search To Do list... Show: Everything

Dec/18/2010
Expanding Your Customer Base
Due by Dec/18/2010 | Optional | Assigned by Diana M Daly | Originated From Curriculum

Course SALE0216
Identifying new customers is essential for you to achieve your full sales potential. In this course you will discover how to expand your customer base by planning...[more](#)

Instructor-Led Item
You are **NOT REGISTERED**
There are **NO SCHEDULED SESSIONS** for this course.
Request Schedule for this item.

30 days remaining Must be registered

Dec/18/2010
Moving from Product Selling to Solution Selling
Due by Dec/18/2010 | Required | Assigned by Diana M Daly | Originated From Curriculum

Course SALE0141
Where do you start to develop a consultative sales relationship when there isn't a well-defined purchasing channel for the product or service you're trying to...[more](#)

Instructor-Led Item
You are **NOT REGISTERED**
There are **NO SCHEDULED SESSIONS** for this course.
Request Schedule for this item.

30 days remaining Must be registered

Easy Links

Curricula 1
Overdue (1)
Due in 30 days (2)
Due Later (0)

Completed Work
No completions in the last 30 days.

Competencies
93% of requirements met

Goals
Complete (0%)
In Progress (0%)
Behind (0%)

Career Path
Target A Future Job

Communities
See what's happening in the forums

- This page displays all assigned curricula, a next action 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 on the folder, the curriculum is complete.
 - 4 Click the curriculum title links to view curriculum details.

Curriculum Status Help

This page includes a list of curricula that have been assigned to you. Each curriculum title links to the Curriculum Details page which includes a list of the curriculum's items and Action drop-down menus where you can register for or request items. On this page you can also view the sub-curricula associated with each curriculum and access information on items as well.

Curriculum Title	Next Action Date	Expiration Date	Assigned By	Remove
Management Policies and Procedures	 Jul/31/2010	N/A	Admin (lane)	
Business Communication	Dec/1/2010	N/A	Admin (lane)	
Supervisory Development	Dec/18/2010	N/A	Admin (lane)	

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.

- From the Curriculum Details page, you can view each item requirement plus subcurricula, curriculum requirements, and/or subcurricula requirements.
- 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 *Title*, *Required By*, or *Date Completed* by clicking the column header.

Curriculum Details Help

[← Back](#)

Business Communication

Summary Information

Curriculum ID: HR-103
Status: Incomplete
Assigned By: Admin (lane)

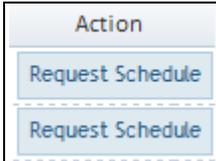
Item Requirements (2 Found)

Title	Type	Required By	Date Completed	Status	Action
Public Speaking for Managers		Dec/1/2010			Request Schedule
Review of Grammar and Writing		Dec/1/2010			Request Schedule

Item Requirements in Subcurricula (0 Found)

Curriculum Requirements (0 Found)

Curriculum Requirements in Subcurricula (0 Found)

	<p>The Type column indicates the item type (blended learning, instructor-led, or online).</p>	
	<p>The Required By column indicates when the item is due.</p>	
	<p>The Date Completed column indicates a completion date for the item. A Credit Provided icon (🔗) indicates credit is provided.</p>	
	<p>The Status column indicates the status of the item.</p>	
	<p>The Action column displays different buttons depending on the item type.</p>	

Notes