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 (filter, view)
7 Steps

Task B
View Completed Work
8 Steps

Task C
View Curriculum Status and Details
6 Steps

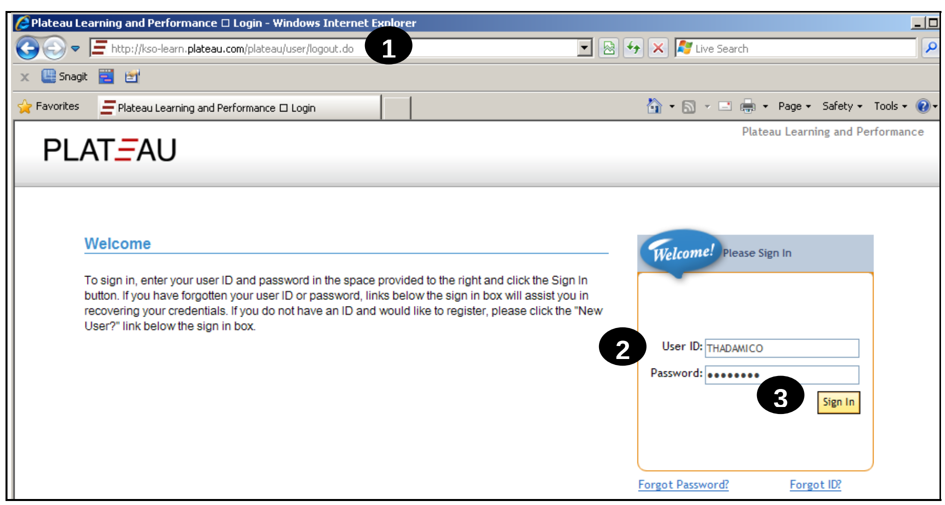
Task A. View To-Do List

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.

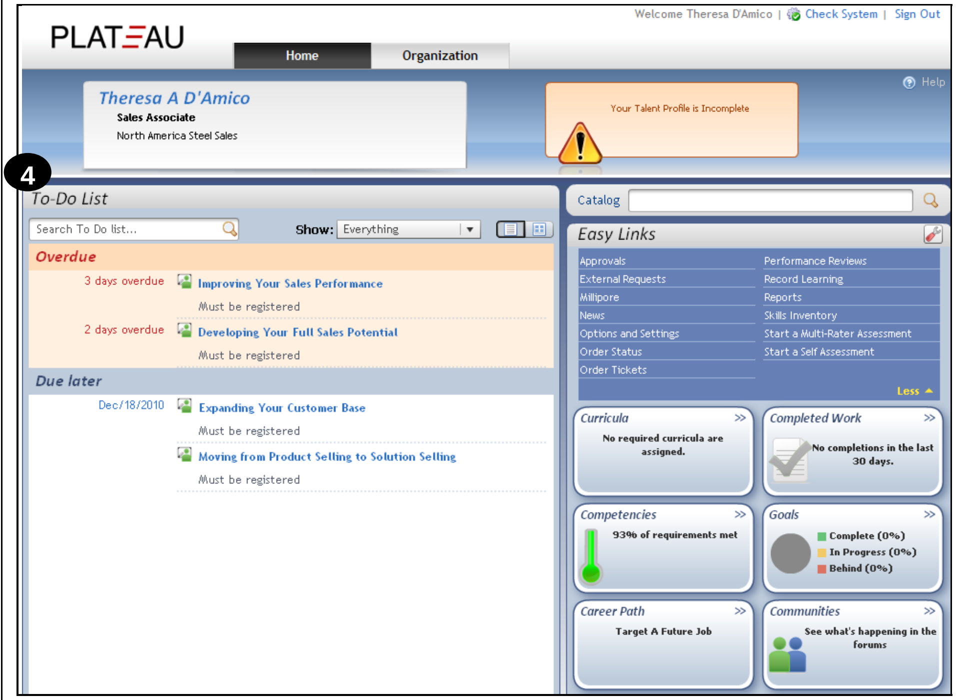
3 Click **Sign In**.



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.

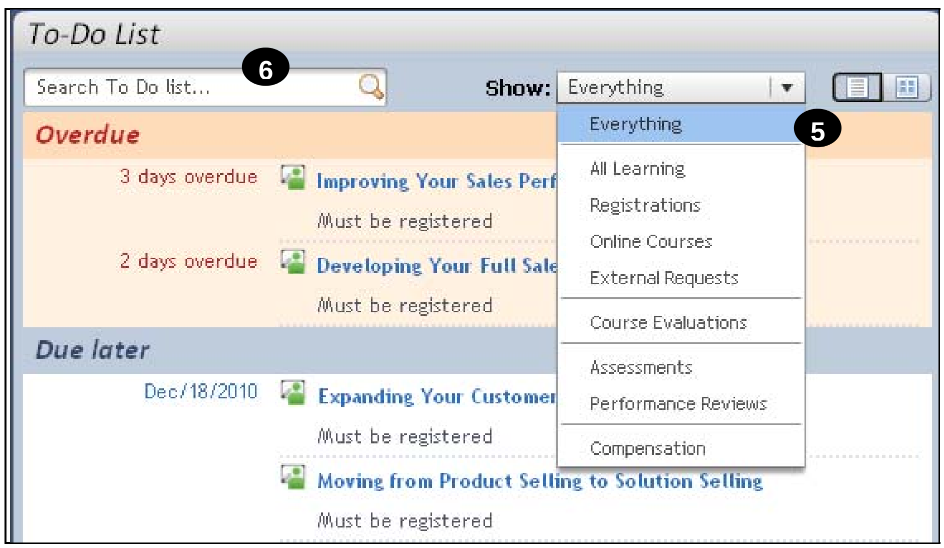
The To-Do List can be filtered and viewed in different ways.



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

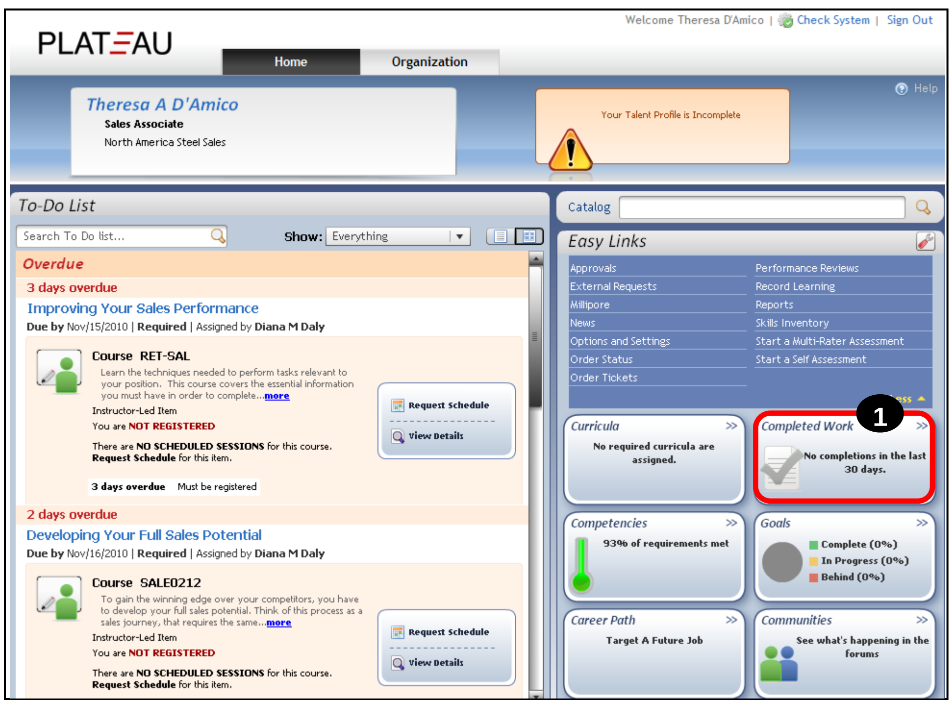
6 Enter text into the 'type ahead' search box to filter the To-Do List.

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

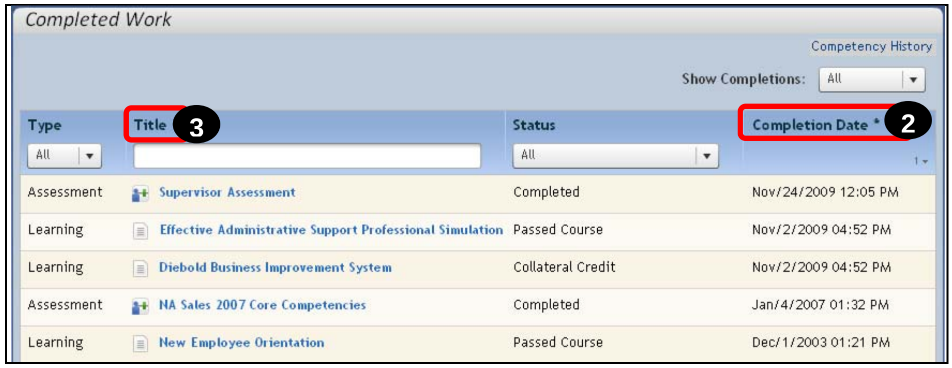


7	Users may prefer to display the To-Do List actions as a card view. Selecting the **Card View** ( ) icon from the top left menu gives full details. The card view displays navigation links for each relevant action.	

Task B. View Completed Work

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

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



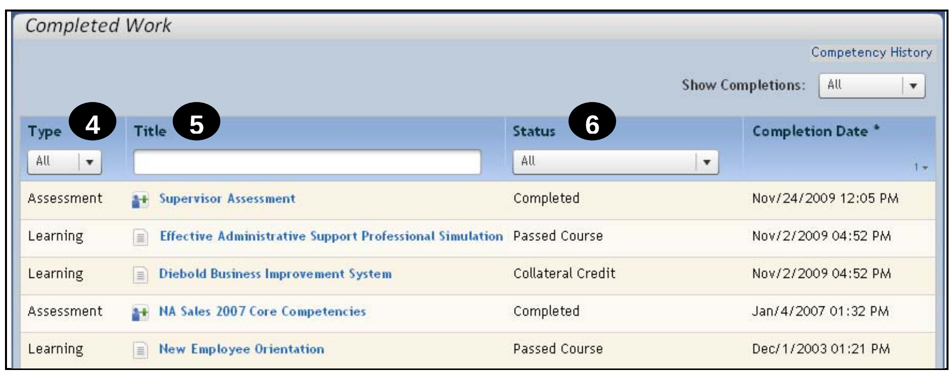
2 Sort the table by selecting the column header. The table to the right is sorted by the *Completion Date*. The sort order arrow (1▲) indicates the column is sorted in ascending order.

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

4 The Completed Work list can be filtered by type by selecting from the **Type** column drop-down menu.

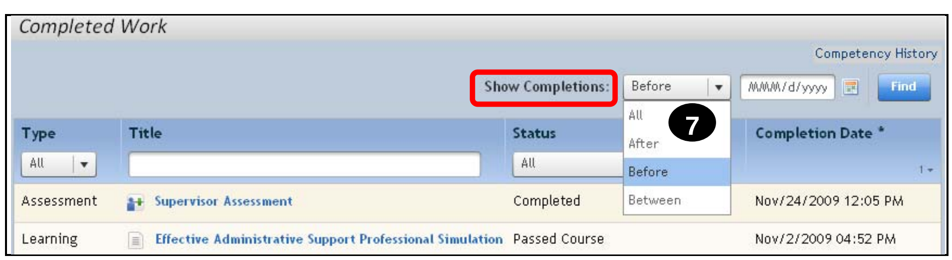
5 Filter the table by title by using the ‘type ahead’ text entry box.

6 Filter the table by status by selecting from the **Status** column drop-down menu.

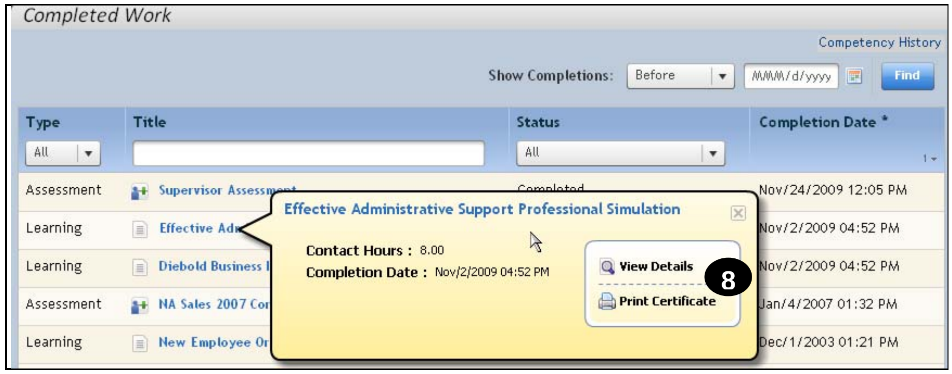


Note: The ‘type ahead’ feature allows you to start typing in the box, and if you have one or more list items that contain the text that you typed, then the system will show only those list items. The type ahead filter is not case sensitive.

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.

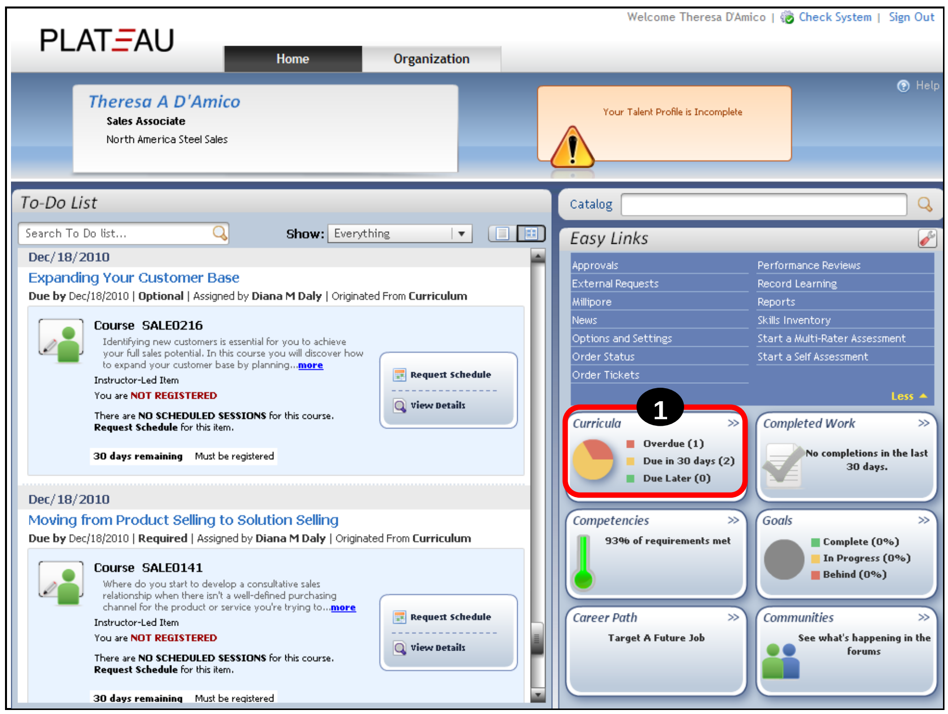


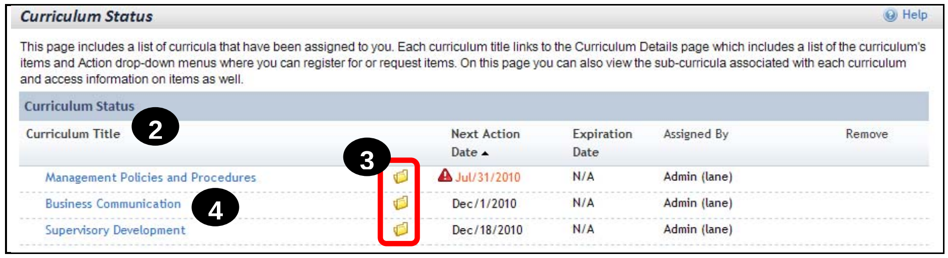
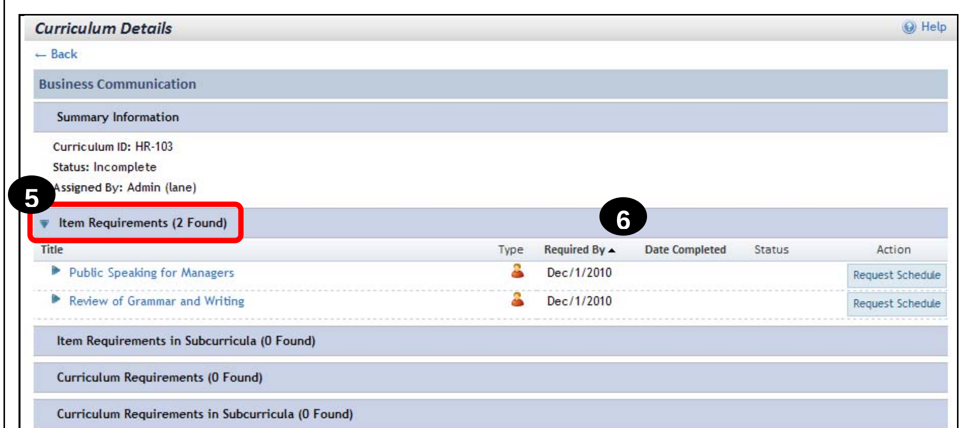
8 The user can select the title link and choose a desired option (**View Details** or **Print Certificate**, for this example).

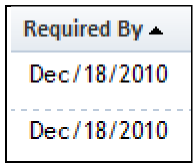
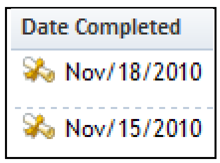
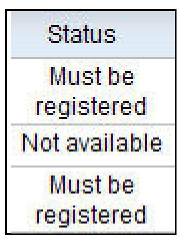
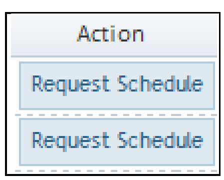


Task C. View Curriculum Status and Details

1 On the Home page, click the **Curricula** pod.



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

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

Notes