

How To Create a Learner Group

(1) Go to Enterprise Learning> Learner Groups> Maintain Learner Groups.

Maintain Learner Groups

Search for Learner Groups

Learner Group ID: =

Learner Group Name:

Learning Environment:

In Use:

Group Type:

Created Date From:

To:

[+ Add Criteria Based Learner Group](#) [+ Add Query Based Learner Group](#)

(2) Click "Add Criteria Based Learner Group" link

Learner Group [Group Criteria](#) [Category Usage](#) [Catalog Item Usage](#) [Activity Usage](#) [Program Usage](#)

[Previous](#) | [Next](#) | [Return To Search Page](#)

Learner Group ID:

Learner Group

'Group Name:

Short Description:

'Learning Environment:

'Owner:

'Group Status:

Automatically maintain membership

Comments:

(3) Type in the Group Name (any meaningful name), Owner (your name) then click "Group Criteria" tab on top of the page.

Learner Group **Group Criteria** Category Usage Catalog Item Usage Activity Usage Program Usage

Save Create New Delete Previous | Next | [Return To Search Page](#)

Learner Group ID: NEXT

Learner Group

'Group Name: IAD

Short Description: IAD

'Learning Environment: Stanford

'Owner: Sheldon Zhai

'Group Status: Active

Automatically maintain membership

(4) The following Group Criteria page will be displayed.

Learner Group **Group Criteria** Category Usage Catalog Item Usage Activity Usage Program Usage

Save Create New Delete Previous | Next | [Return To Search Page](#)

Learner Group: IAD

Learner Group Criteria First 1 of 1 Last

()	Criteria Type	Operation	Criteria Value	Value Description	AND/OR
()		=			OR + -

Populate Learner Group

Group Members

No group member has been created.

(5) Click drop down list on Criteria Type and select "Department" as the Criteria Type.

It is recommended for the administrators to use "Department" as the Criteria.

Learner Group: IAD

Criteria Type	Operation	Criteria Value	Value Description	AND/OR
Department	=			OR

Populate Learner Group

Group Members

No group member has been created.

(6) Click Magnifying Glass on the right of Criteria Value field will bring up the Department Look Up Criteria Value page below.

Look Up Criteria Value

Department ID: =

Organization Name: begins with

Learning Environment ID: =

Look Up Clear Cancel Basic Lookup

(7) Now type in any word you think that could be **PART** of your department name in Organization Name field (please don't use Department ID). For example, if you type in "med" then click yellow "Look Up" button, the search will bring back all departments in STARS with the name "begin with" the "med" like below. If you change the operator to "contains", then the Look Up might bring back more department names.

Organization Name:

Learning Environment ID:

[Basic Lookup](#)

Search Results

View All First 1-28 of 28

Department ID	Organization Name	Learning Environment ID	SetID	Departm
1585	Med/Blood & Marrow Transplant	1	STANF WFIE	
1586	Med/Cardiovascular Medicine	1	STANF WFPS	
1863	Med/Clinical Pharmacology	1	STANF WGTW	
2565	Med/Clinical Pharmacology	1	STANF WGTV	
1590	Med/Endocrinology	1	STANF WLSA	
1591	Med/Family & Community Medicin	1	STANF WMHC	
1587	Med/Gastro & Hepatology	1	STANF WHIY	
1589	Med/General Internal Medicine	1	STANF WHYA	
1592	Med/Hematology	1	STANF WOPK	
1593	Med/Immunology & Rheumatology	1	STANF WPEM	
1594	Med/Infectious Diseases	1	STANF WPTO	
1583	Med/Medicine Operations	1	STANF WETC	
1595	Med/Nephrology	1	STANF WUKE	
1596	Med/Oncology	1	STANF WUZG	
1598	Med/PCOR	1	STANF WXXWQ	
1597	Med/Pulmonary & Critical Care	1	STANF WXAA	
2709	Med/Residency & Educ Prog	1	STANF WJAA	
1599	Med/SMI	1	STANF WYLS	
2049	Med/Stan Prevention Rsch Ctr	1	STANF WQXS	
1600	Med/Vaden	1	STANF WYPM	
496	Media Relations	1	STANF LKJG	
407	Media Solutions	1	STANF JEIQ	
594	Media-X	1	STANF MSGG	
2550	Medical Residency Program	1	STANF VMAA	
371	Medical Services	1	STANF HGIQ	
1582	Medicine	1	STANF WEPI	
2382	Medieval Studies	1	STANF QRCW	
2378	Mediterranean Studies	1	STANF QNWB	

- (8) One more example before we go to next step, if we type in “**medi**” AND change the operator to “contains”. Then click yellow “Look Up” button, it will search on any part of the department names in the system that matches the word “medi” (not case sensitive). So the search will bring back all department names that contains “medi” like below. If we can not find the department name in the system, we better try to use another word and use “contains” operator to “Look Up” again, eventually we will find it.

Look Up Criteria Value

Department ID: =

Organization Name: contains

Learning Environment ID: =

[Basic Lookup](#)

Search Results

View All

First

Department ID	Organization Name	Learning Environment ID	SetID	Depart
2077	Clinics-Stanford Medical Group	1	STANF ZDKG	
2306	Comparative Medicine	1	STANF VXIW	
1584	Dept of Medicine Xerox Center	1	STANF WFAQ	
1476	Electronic Mediated Learning	1	STANF UGQQ	
2374	Film and Media Studies	1	STANF PDFX	
1569	FuncRest/Sports Medicine	1	STANF WARO	
2202	Howard Hughes Medical Inst	1	STANF ZZSK	
2119	LPCH-Medical Records	1	STANF ZKBP	
2135	LPCH-Medical Staff	1	STANF ZKGW	
1586	Med/Cardiovascular Medicine	1	STANF WFPS	
1591	Med/Family & Community Medicin	1	STANF WMHC	
1589	Med/General Internal Medicine	1	STANF WHYA	
1583	Med/Medicine Operations	1	STANF WETC	
496	Media Relations	1	STANF LKJG	
407	Media Solutions	1	STANF JEIQ	
594	Media-X	1	STANF MSGG	
2550	Medical Residency Program	1	STANF VMAA	
371	Medical Services	1	STANF HGIQ	
1582	Medicine	1	STANF WEPI	
2382	Medieval Studies	1	STANF QRCW	
2378	Mediterranean Studies	1	STANF QNWB	
107	OSR Medicine	1	STANF BXDX	
1864	Peds/Adolescent Medicine	1	STANF XGOU	

- (9) Click on the department name that matches your Org Code, in this example, we choose ID 1583 for the Criteria Value, and it is Med/Medicine Operations (WETC). After clicking on the link, we will go back to the Group Criteria page and the Criteria Value 1583 will be automatically populated in that field, the department name will be filled in as Value Description on the page.

Learner Group: IAD

Learner Group Criteria First 1 of 1 Last

()	Criteria Type	Operation	Criteria Value	Value Description	AND/OR
()	Department	=	1583	Med/Medicine Operations	OR

Populate Learner Group

Group Members Build Learner Group

No group member has been created.

(10) Now click "Populate Learner Group" button to populate the group by department ID 1583 we have selected. We will see 41 learners being populated on the page like below.

Populate Learner Group

Group Members

Search For Learner: Go [View All](#) 1 - 20 of 41

Learner ID	Employee ID	Name	Organization
1001870	05398541	Maryam Farshad	Med/Medicine Operations
1002146	09853185	John Wolf	Med/Medicine Operations
1003288	09899220	Diane Starrett	Med/Medicine Operations
1009135	99998247	Donna Adelman	Med/Medicine Operations
1009980	05171912	Shanta Chandra	Med/Medicine Operations
1011407	09750068	Valerie Williams	Med/Medicine Operations
1013566	05222661	Muhammad Akhtar	Med/Medicine Operations
1013865	05242073	Minjung Kwok	Med/Medicine Operations
1014198	09983723	Katherine Smith	Med/Medicine Operations
1015184	05268946	Suman Prasad	Med/Medicine Operations
1015858	05271329	Barbara Titel	Med/Medicine Operations
1020776	09776618	Michael Polochak	Med/Medicine Operations
1021459	05311495	Joan Bruffy	Med/Medicine Operations
1024320	05311534	Sandy Echon	Med/Medicine Operations
1025893	05311497	Parminder Singh	Med/Medicine Operations
1026047	05311102	Christine Foppiano	Med/Medicine Operations
1026221	05311535	Jennifer Maher	Med/Medicine Operations
1030888	09722687	Gurpreet Heran	Med/Medicine Operations
1032842	99993347	Robert Tucker	Med/Medicine Operations
1034088	09902479	Angela Gannon	Med/Medicine Operations

(11) Click "Save" button. (clicking the button on top of the page OR on bottom of the page)

[Learner Group](#) | [Group Criteria](#) | [Category Usage](#) | [Catalog Item Usage](#) | [Activity Usage](#) | [Program Usage](#)

Save | Create New | Delete | Previous | Next | [Return To Search Page](#)

Learner Group: IAD

Learner Group Criteria First 1 of 1 Last

()	Criteria Type	Operation	Criteria Value	Value Description	AND/OR
()	Department	=	1583	Med/Medicine Operations	

[Populate Learner Group](#)

Group Members

Search For Learner: [Go](#) [View All](#) 1 - 20 of 41

Learner ID	Employee ID	Name	Organization
1001870	05398541	Maryam Farshad	Med/Medicine Operations
1002146	09853185	John Wolf	Med/Medicine Operations
1003288	09899220	Diane Starrett	Med/Medicine Operations
1009135	99998247	Donna Adelman	Med/Medicine Operations
1009980	05171912	Shanta Chandra	Med/Medicine Operations
1011407	09750068	Valerie Williams	Med/Medicine Operations
1013566	05222661	Muhammad Akhtar	Med/Medicine Operations

(12) We are done with creating the new learner group IAD.

Something we should know about:

- We will be able to modify the group name later.
- We will be able to add more learners in to the group later.
- We will be able to delete learners from the group later.
- We shall **NOT** use "Populate Learner Group" button after we delete or add learners unless we want to refresh the list. We should click "Save" button.

(13) Add more learners by clicking "Add Learner" link down below the page.

1026221	05311535	Jennifer Maher	Med/Medicine Operations
1030888	09722687	Gurpreet Heran	Med/Medicine Operations
1032842	99993347	Robert Tucker	Med/Medicine Operations
1034088	09902479	Angela Gannon	Med/Medicine Operations

[+ Add Learner](#) | [Proceed to Mass Enrollment](#)

(14) Clicking Magnifying Glass to search a new learner. Or if you know the learner's EmpIID, type in the EmpIID directly, then click "Save".

1032842	99993347	Robert Tucker	Med/Medicine Operations	
1034088	09902479	Angela Gannon	Med/Medicine Operations	
<input type="text"/>	<input type="text"/>	Name		

Look up Learner ID (Alt+5)

(15) To delete a learner, we have to delete one by one. Click the trash can on the right hand side of each row, then click "Save".

You might want to ignore (16) – (19) for "delete learner group" unless you want to delete it.

(16) You can delete the learner group by clicking "Delete" button on top of the page if you are sure the learner group is not used anywhere in the system.

[Learner Group](#) | [Group Criteria](#) | [Category Usage](#) | [Catalog Item Usage](#) | [Activity Usage](#) | [Program Usage](#)

Save | Create New | Delete | Previous | Next | [Return To Search Page](#)

Learner Group: IAD

Learner Group Criteria First 1 of 1 Last

()	Criteria Type	Operation	Criteria Value	Value Description	AND/OR
()	Department	=	1583	Med/Medicine Operations	

Populate Learner Group

Group Members

Search For Learner: Go [View All](#) 1 - 20 of 41

Learner ID	Employee ID	Name	Organization
1001870	05398541	Marvam Farshad	Med/Medicine Operations
1002148	09853185	John Wolf	Med/Medicine Operations

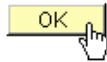
(17) You get confirmation page if you try to delete the learner group.

Are you sure you want to delete this learner group? (18086,248)

(18) Clicking "Yes" button will delete the learner group IAD from system.

Learner Group

Learner Group 'AD' deleted successfully.



(19) Clicking "OK" button then select "Cancel" to go back to the Maintain Learner Group page.

Maintain Learner Groups

Search for Learner Groups

Learner Group ID: =

Learner Group Name:

Learning Environment:

In Use:

Group Type:

Created Date **From:**

To:

[Add Criteria Based Learner Group](#) [Add Query Based Learner Group](#)

- **How to Schedule Mass Enrollment for a Learner Group**

After we created a learner group, Enrollment Administrators will be able to register the group to a program or enroll the group into an activity.

1. Go to Enterprise Learning > Learner Groups > Maintain Learner Groups.

Maintain Learner Groups

Search for Learner Groups

Learner Group ID: =

Learner Group Name:

Learning Environment:

In Use:

Group Type:

Created Date From: To:

Learner Group Results View All | First 1 of 1 Last

<u>Group Id</u>	<u>Name</u>	<u>Status</u>	<u>Learning Environment</u>	<u>In Use</u>
<input type="checkbox"/> 1127	XZKU	Active	Stanford	No

2. Type in the Learner Group name "XZKU", then click "Search" button, we will be able to open the learner group page we created before. Clicking the "XZKU" name link to open the "Learner Group" page.

Learner Group ID: 1127

Learner Group

'Group Name:

Short Description:

'Learning Environment:

'Owner:

'Group Status:

Automatically maintain membership

Comments:

Last Refreshed On: 08/12/08 2:58PM

Created: 08/12/2008 2:23PM PDT XZHAI

Last Modified: 08/12/2008 2:24PM PDT XZHAI

3. On the Learner Group page, clicking "Group Criteria" tab on top of the page to open the Group Criteria page.

Learner Group: XZKU

Learner Group Criteria First 1 of 1 Last

()	Criteria Type	Operation	Criteria Value	Value Description	AND/OR
()	Department	=	1778	Urology	OR

Group Members

Search For Learner: [View All](#) 1 - 20 of 103

Learner ID	Employee ID	Name	Organization
1000268	05357903	Diana Krause	Urology
1001247	05375509	Anne Carzon	Urology
1001826	05398243	DAWN BRAVO	Urology

1008482	07747900	Duncan Govan	Urology	
1009304	04095790	Bing-vin Wang	Urology	
1009829	05171849	Marci Hemenez	Urology	

[+ Add Learner](#) [Proceed to Mass Enrollment](#)

4. On the bottom of the Group Criteria page, there is a link called "Proceed to Mass Enrollment". This is the link we will be using to enroll learners.

Note:

- Clicking "Proceed to Mass Enrollment" link on this page does NOT mean it will process the mass enrollment for THIS learner group.
- Administrator will need to choose and assign a learner group (will be able to choose any of other learner groups!) in next 2 steps.

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- 6. Click on "Save" button.¶
- ¶
- Repeat the same steps from 2 to 6 to associate more keywords to your program.¶
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5. Clicking "Proceed to Mass Enrollment" link will bring up Enroll Learners page. At first, we search a program to register learners or search an activity to enroll learners. Type in "HIPAA" in the "Title" field on the page then click "Search" button.

Search for Learning

Title: Type:

Item Code: Location:

Activity Code: Language Code:

Description: Start Date: From: Through:

Category:

Objective:

Instructor:

6. Clicking "Search" button will bring back the result page like below. Please notice that there will be a "Register" button for each certification program, and an "Enroll" button for each activity.

Code	Name	Type	Start Date	Language	Enroll
HPAA-0302-000001	HIPAA Advanced	Web (self-paced)	08/04/2008	English	<input type="button" value="Enroll"/>
HPAA-PRGM-0301	HIPAA Advanced Certification	Certification			<input type="button" value="Register"/>
HPAA-0102-000001	HIPAA Awareness	Web (self-paced)	08/04/2008	English	<input type="button" value="Enroll"/>
HPAA-PRGM-0101	HIPAA Awareness Certification	Certification			<input type="button" value="Register"/>
HPAA-0801-00001	HIPAA Computer Security Awareness	Web (self-paced)	08/13/2008	English	<input type="button" value="Enroll"/>
HPAA-0600-000002	HIPAA Education	Web (self-paced)	07/30/2008	English	<input type="button" value="Enroll"/>
HPAA-PRGM-0500	HIPAA Education	Certification			<input type="button" value="Register"/>
HPAA-0202-000001	HIPAA Fundamentals	Web (self-paced)	08/04/2008	English	<input type="button" value="Enroll"/>
HPAA-PRGM-0201	HIPAA Fundamentals Certification	Certification			<input type="button" value="Register"/>
HPAA-PRGM-0401	HIPAA Research Certification	Certification			<input type="button" value="Register"/>

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7. Clicking "Register" button on right of "HIPAA Awareness Certification" program.

8. Clicking "Register" button will bring up the "Find Learner" page. This is where the administrator should use your learner group. For example, type in group name "XZKU" in the Learner Group field. Then click "Search" button.

Also you should be able to add learners one by one from the page by providing employee ID or learner name then "Search".

Note: If you forget to provide a learner group on this page, you will enroll ALL learners (more than 13,000) in the system!

Program Name: [HIPAA Awareness Certification](#) **Type:** Certification
Program Code: HPAA-PRGM-0101 **Contact:**
Price Per Seat: 0.00 USD **Drop Charge:** 0.00 USD
Schedule: All requirements must be completed within 30 days from date of registration.
Expiration Date: 08/31/2009
Recertification Period: 15 days

Learner Search Details			
Learner:	<input type="text"/>	Business Unit:	<input type="text"/>
Employee ID:	<input type="text"/>	Job Code Descr:	<input type="text"/>
Manager:	<input type="text"/>	Position Descr:	<input type="text"/>
Learner Group:	<input type="text" value="XZKU"/>	Organization Type:	All
Hire Date:	From: <input type="text"/>	Organization Name:	<input type="text"/>
	Through: <input type="text"/>		

9. The "Group Enrollment - Warning" page will be displayed. We will be getting the warning that you have selected 65 learners in XZKU group and 65 learners will be enrolled if you click on "Schedule Mass Enrollment" button.

Group Enrollment - Warning

The selection yielded 65 learners, which is more than the number 30 allowed for group enrollment.

To continue select from following options:

Schedule Mass Enrollment

Continue Group Enrollment and select the individual Learners but do not to exceed the maximum of 30.

Cancel and return to learner selection page to modify criteria

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10. Before clicking "Schedule Mass Enrollment" button, it is our responsibility to double check and make sure the learner group was assigned. You might not seeing this warning page due to the recent system configuration changes. If the number of learners is less then 200, administrators will be able to enroll them right away, and you will get a confirmation page that list everyone with the enrollment status, most of them will be "enrolled", your might get couple of "Alert" status, please click on the "Alert" link to check what happened to the learner's enrollment.

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5. Select the one you want to associate to the program, you will come back to the Attributes page and the selected keyword will be populated in the Keyword field.

6. Click on "Save" button.

Repeat the same steps from 2 to 6 to associate more keywords to your program.

[Details](#) | [Sections](#) | **Attributes** | [Prerequisites](#) | [Equivalents](#) | [Notes/Attachments](#)

Name: Bloodborne Pathogens **Certification Code:** EHS-PROG-1600
Effective Date: 03/01/2007 **Version:** 1.0

Save
 Create New
 Clone
 Delete
 [Previous](#) | [Next](#) | [Return To Search Page](#)

Category Relationships		First	1-2 of 2	Last
Order	Category			
1	General Safety, Fire & Emergency Preparedness			
2	Research & Laboratory Safety			

[+ Add Category](#)

Keywords		Find	First	1-4 of 4	Last
*Keyword Type	Keyword				
All Keywords	Compliance				
All Keywords	Biological				
All Keywords	EH&S				
All Keywords	EHS				

[+ Add Keyword](#)

-----Page Break-----

Associate keywords to an Item:

1. Open the item, go to Attributes tab.
2. Click on [Add Keywords](#) link, you will see a blank row in the Keywords grid.
3. Type in "All Keywords" in *Keyword Type field, then tab out from the field.

4. Search for a keyword by clicking on the Magnifying Glass on the right of Keyword field, it will return all keywords from that Keyword Type.
5. Select the one you want to associate to the item, you will come back to the Attributes page and the selected keyword will be populated in the Keyword field.
6. Click on "Save" button.

Repeat the same steps from 2 to 6 to associate more keywords to your item.

The screenshot displays the 'Attributes' tab of a catalog item management interface. At the top, there are navigation tabs for 'Item Details', 'Attributes', and 'Delivery Method'. Below these are action buttons: 'Save', 'Create New', 'Delete', 'Send Notifications', and 'Return to Catalog Item Search'. The main content area shows 'Catalog Item: Bloodborne Pathogens' and 'Code: EHS-1600'. A section titled 'Catalog Item Attributes' contains three sub-sections: 'Category Relationships' with a table showing a single entry for 'Research & Laboratory Safety' with a display order of 1; 'Keywords' with the message 'No Catalog Item Keywords Found'; and 'Objective' with the message 'No Catalog Item Objectives Found'. Each sub-section has an 'Add' button. At the bottom right, there are links for 'Correct History', 'Previous', and 'Next'.

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f you get the error message "can not change current history..." please click on the [Correct History](#) link down below on the page, then you will be able to update the data on this page. If you don't see the Correct History link enabled for you, please file a HelpSU ticket

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