As you move past the initial stages of using the Learning Center, you may see a need to assign your own Agendas or customized Tests to your employees.

Maybe you have a specific set of tasks that have to be completed when a new employee begins working?

Or perhaps your business requires a specific certification test.

As the System Administrator you are able to create this content.

In today's lesson we are going to create a learning plan for a new employee.

We are going to create Tasks, Questions and Tests to form a complete Agenda.

Once complete, the new employee Accomplishment will be noted and he or she will be prepared to start working.

Let's begin with the creation of a 'Task'.

This can be anything that you would like your employees to do that is not contained in a 'Course' or a 'Test'.

Tasks can be text-based instructions or a dynamic link to web-based content.

We will create a Task to 'Review the Employee Handbook'.

Go to 'Manage Tasks' under the 'Admin Tab' and Click 'Add New Task'.

Complete the form with the Name and Description of the Task.

The description should include any necessary instructions required for the completion of the task.

If you want to add a URL to provide a link to a resource enter that here.

We have copied a Shortcut to the 'Employee Handbook' in the Library.

Once all the information is entered click Submit.

If you need to edit the task, select ‘Browse’ from the ‘Manage Tasks’ menu.

Locate the Task, and click ‘Edit’.

To remove a Task from the list, change the ‘Active’ status to ‘No’ and click ‘Submit’.

A ‘Test’ is a good way to find out if the ‘Task’ you have given a New Employee has actually been done correctly.

To add a Test ‘Question’, go to ‘Manage Questions’ on the Admin Tab, then click ‘Add Questions’.

Enter the Question ‘Text’ along with 2 to 5 possible answers.

Questions can be True/False, Multiple Choice or Fill in the Blank.

Indicate the Correct answer by clicking the ‘Radio Button’ to the right.

Select the ‘Difficulty’, ‘Category’, ‘Subcategory’, and ‘Topic’.

Now click Submit.

A confirmation message will confirm that your question was added successfully.

Once all of the questions have been added, you are ready to create the Test.

Start by clicking ‘Manage Tests’ from the Admin tab and then select ‘Add’.

You have the option of creating a test from scratch or by copying an existing test, and altering it.

Let’s build a test from scratch so you can see the process.

Add a ‘Name’ for the test.

We recommend adding the word ‘Test’ so you will know at a glance what type of assignment this is.

Then add a short ‘Description’ of the test.

Choose a ‘Category’ and ‘Subcategory’ and click ‘Next’.

Begin adding the Test Questions.

The list you see includes all the questions that are available to you. These include both the Public Epicor Defined questions and those you created just for your company.

Use the fields at the top of the page to filter the list.

‘Type’ allows you to separate questions you have created from the Epicor questions by selecting ‘User-defined Questions’.

You can further refine this list by using ‘Keyword’.

Click ‘Filter Questions’ when you have finished setting the parameters.

Place a check in the checkbox to the left of any question you want to add to your test.

There will be a running tally shown here   so you know how many questions you have selected.

Continue filtering and selecting questions until your test is complete.

Click ‘Next’ to add the questions to your test.

Clicking the link to ‘Add Questions to Test’ lets you return to the list of questions if you determine that more should be added.

At this point you will want to carefully proofread the test.

‘Edit Properties’ allows you to make corrections to the Test Name, Description, Category or Subcategory.

If an error is found on a question you can return to ‘Manage Questions’ to correct it.

If you want to have your questions appear on the test in a different order than originally selected click here and drag the question up or down to alter the position.

If you have selected a question you do not want to appear at all on the Test, click here on the ‘Trash Can’ and Delete it. This does not delete the question from the list of User Defined questions.

Once you have finished click ‘Next’.

The last step is to Publish the test. This makes it available to assign or add to an Agenda.

Using the ‘Save Test’ option allows you to return and finish it later.

Remember a test will not be available for Assignment until it is Published.

If you do not want to create a Test from scratch you can also copy and edit an existing one.

From ‘Manage Tests’ on the Admin Tab select ‘Add’.

Choose ‘Copy an existing test’.

Select the ‘Test’ from the drop down list.

You must give the test a new and unique ‘Name’.

Adding your company name can be an easy way to accomplish this.

The Description can be changed along with the Category and Subcategory.

Click ‘Next’.

You now have the opportunity to change any of the Questions included on the original Test.

Remove a Question by clicking the ‘Trash Can’.

You can add questions by clicking the ‘Add Questions to Test’ link.

Click ‘Next’ and either Publish the test or Save it for further editing.

Now that we have our ‘Tasks’ and ‘Tests’ added to the LMS we can complete our ‘Agenda for New Employees’.

From the Admin Tab select ‘Manage Agendas’ and click ‘Add’.

Here you have 3 choices.

You can ‘Create an Agenda from scratch’, ‘Copy an existing agenda’, or ‘Create an agenda from a role’.

We are going to start by creating a new Agenda from scratch.

Enter the ‘Name’.

For our example we are going to call this ‘New Employee Agenda’.

Enter a ‘Description’ which accurately describes what the Agenda is for.

Next, you will add all of the components of the Agenda.

First, select the assignment ‘Type’ from the drop down menu.

Then choose the specific ‘Assignment’.

Click ‘Add Agenda Item’ to add another.

Repeat this process until all of your Agenda items have been added.

You can change the order of the assignments within the Agenda or put a check in the ‘Delete’ box to remove one.

Clicking ‘Submit’ creates the Agenda and Deletes the checked items.

You can now ‘Publish’ the Agenda.

You will need to select the option to ‘Share with users’ so it is available for assignment.

Once an agenda is Published no changes can be made.

Simply ‘Save the Agenda’ if it is not ready to be Published.

Remember an ‘Agenda’ cannot be Assigned until it is Published and Shared.

To view your Agendas navigate to ‘Manage Agendas’ and click ‘Browse’.

You can see that they are listed as ‘Published’, ‘Unpublished’, or ‘Retired’.

Published Agendas can be assigned to employees. Once published, they cannot be edited.

Unpublished agendas are those you chose to ‘Save’ instead of Publish. An unpublished Agenda cannot be Assigned but it can be Edited or Deleted.

A Retired Agenda is one that is no longer in use. You do have the option to republish it if needed.

Employee Accomplishments can be recorded on their transcripts.

Perhaps some employees have earned a safety certification or completed an educational degree.

Many times these certifications can affect insurance policy premiums and business taxes, so it’s important to document them.

From the ‘Admin’ Tab select ‘Manage Accomplishments’ and then click ‘Add new accomplishment’.

Complete the Name and Description fields in the electronic form. Then make sure that it is listed as ‘Active’ before continuing.

Accomplishments can be assigned to an individual employee or a Group from the Assignments page.

When your New Employee has completed all of the necessary Tasks and Tests you can indicate that they have achieved this Accomplishment and are ready to move forward.

While Training on Demand offers a robust curriculum for Eagle applications, there may also be some content specific to your own business that needs to be communicated.

Creating your own Questions, Tests, and Tasks allows you accurately assess and record an employee's knowledge in your specific industry.

Recording their Accomplishments boosts morale, encourages learning and gives you an opportunity to provide any needed documentation for insurance or tax purposes.