Get More Out of the Epicor Learning Center

Customer: Hey Robert, I recently started using Epicor Training on Demand but I'm having some trouble figuring some things out.

Robert: Hey, I can help. What are you struggling with?

Customer: Well, I'd like to set up a way that my employees can have easy links to important information. I also want to store our training manuals on the site. And somebody also took a test before they took their training and failed it. So now I have to go back and figure out how to reassign it to them.

Robert: Don't worry. All this stuff is easy to find. Decide where you want to start by clicking one of the options on the right.

Topics:

- Training on Demand Shortcuts
- Training on Demand Library
- Reassigning a Failed Test

Training on Demand Shortcuts

In your business, you probably have websites or online documents that your employees need to quickly access. These might include your company website, government controlled safety standards, or Human Resource documents. Shortcuts give you an easy place to add and store these links.

Select admin from the toolbar. Then click Shortcuts on the side menu. Here you can enter the name of the source, and its web address. The web address can be for a webpage, online document, or even a YouTube video. If you need more than three, select Add New Shortcut. To hide a link, select the inactive box and press Save.

The information will remain, but will not show on the Training On Demand homepage. If you need to remove it completely, select Delete and press Save. If you need to rename a link, or change a web address, simply put in the new information and press save. Try using the Shortcuts feature on the Training On Demand Homepage. You'll find that you can easily direct staff and new hires to the information they need.

Training on Demand Library

The Library is a convenient place to keep your training documents and links. You'll find it by selecting the Library tab or the View All Resources link in the Company Library section. This gives us three options: View Resources, Add Resources, and Browse Resources. View Resources shows all the documents and links you've uploaded to the library. Click a title to open the corresponding item.

To add an item to your Library, select the Add link. Decide if you want to add a web link or upload a file, and enable the corresponding radio button. Handy web links might include the company website, or online training videos. Press Submit to add the link to the Library. Now let's upload a document. Enter the display name for the file, and click the Choose File button.

Locate the file from your computer and press OK. Again, click Submit to add the file to the Library. Let's confirm that the file uploaded. Oops! Looks like we entered the file name incorrectly. Don't worry, it's simple to fix!

Select the Edit Option. Alter the Name field, or replace the uploaded document by clicking the Choose File button. Let's fix our typo and click submit to save the changes. In the Edit Permissions screen, you can control what Groups are able to view specific Resources.

We'll select Cashiers and use the Add and Remove buttons to place them in the Restricted Group list. Click Submit to save your changes. If you need to delete resources from the Library, the option is right here. The Learning Center prompts you to confirm the action. This permanently removes it from your Resource Library making it easy to manage your content.

Reassigning a Failed Test

Everyone makes mistakes, right? Sometimes, an employee may fail a test too many times but still need to retake it. Let's look at how to reassign it for them. From the Learning Center homepage, select the Transcripts tab.

On the side menu and choose Employee Transcripts. Select the Employee Name from the Dropdown menu and press Submit. Click Tests from the View list. Locate the test in question and press the Reassign hyperlink.

On the New Assignment page, you'll see the employees name already listed. Enable the Override Existing Completion Status, checkbox. Verify the Start and Due Dates, update any of the other test options and then click Submit.

The test will now appear on the employee's Open Assignments page and they will be able to take it again. Once they pass, the Test will appear in their Transcript and update any related Agenda.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

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