

Understanding Roles and Agenda Components

Epicor Learning Center is designed to be a comprehensive training tool right out of the box, allowing you to give your users the knowledge and confidence they need to use your software solution.

Your site comes complete with pre-defined role-based learning agendas.

But you can also customize a program to meet your specific needs. This robust functionality allows you to create unique agendas, map different content to roles, or link and integrate your own content.

We'll take a quick look at how these learning objects relate to each other to create your optimum training curriculum.

AGENDAS AND ROLES

Let's start with agendas, which consist of bundles of educational material that can contain a combination of on-demand courses, related tests, and specific tasks such as reading a document, completing something outside of Epicor Learning Center like safety training, or visiting a webpage.

Agendas are our recommended training on a particular process flow.

Roles can be thought of just like roles or job positions within your company and here they align to the recommended training agendas. You, as a user, are a member of a role.

But just like in real life, you can wear multiple hats in Epicor Learning Center. We know you might be a member of more than one team at work, so you can be a member of more than one role here.

When your Epicor Learning Center account is created, your administrator selects your role – or roles – and all of the recommended education is assigned to you.

The good news is we've already done the hard work of aligning agendas to roles.

Best of all, Epicor Learning Center performs a Smart Assignment with these agendas, so if there's any material in one agenda that is repeated in another agenda, you won't be assigned that content twice.

When agendas are updated by us--or your system administrator, again, Smart Assignment knows what you have already completed.

So how does it all come together? Let's see how it works for Jane.

Jane's a department manager. Because she can also add and delete products and conduct physical inventories, Jane is a member of 3 Roles: Department Manager, Inventory Clerk, and Physical Inventory Team.

Those Roles are associated with 4 Agendas.

When Jane started, the system administrator made her a member of each role and all the related Agendas were automatically Smart-Assigned!

When Jane logs in, she can click Assignments, then My Assignments.

From here, she can view her assignments by clicking Roles and expanding the relevant role to view courses, complete tasks, and take tests by the defined due date.

To see all of the content she has completed so far, she can click Transcripts, then click My Transcript.

ASSIGNMENTS

Once she's completed everything assigned to her role and wants to learn more, Jane can take on more agendas! Let's show you how to do it.

Click Course Catalog, then Quick Views. Select Agendas.

Select an agenda if you'd like to take a look at what's in it. Note that each Agenda displays its title, a short description, the duration, and a list of its contents and each component's type: test, task, or course.

If Jane's ready to take it on, she can go right ahead! She can assign an agenda to herself using the controls in the top right.

Click Assign Agenda to Me.

Once assigned, she'll be able to see her assigned agendas by clicking My Assignments, then clicking My Assignments under that heading.

We'll see the date when the agenda was assigned. She can click the agenda's name to expand it. Inside, she'll see the contents of the agenda.

If she wants to get started, she can click a course, test, or task name to open it.

AGENDA STATUS

Jane can check the status of her open Agendas by navigating to My Assignments.

The Agenda tab shows the start and due dates along with the percentage complete.

Expanding an agenda shows the individual content status. Here we can see this agenda has 8 courses and only one is completed. 1 out of 8 means she is 12.5 percent done.

Jane, and you, should have a pretty good understanding of Agendas, Roles and the components that make them up. Use them to get the most value out of your Epicor Learning Center.

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