AgLearn
User Toolkit

October 2023

Table of Contents

Section 1 – Page Layout and Navigation

Most pages have similar layouts to the **Dashboard**, so we will use that to explore the different components that make up any given page. Actual page layouts do vary and will look different based on the selected tab. However, most pages will follow this layout closely.

1.1 Dashboard

The Dashboard is a customized and configurable page that helps users easily navigate to learning activities. Typically comprised of blocks and content areas.
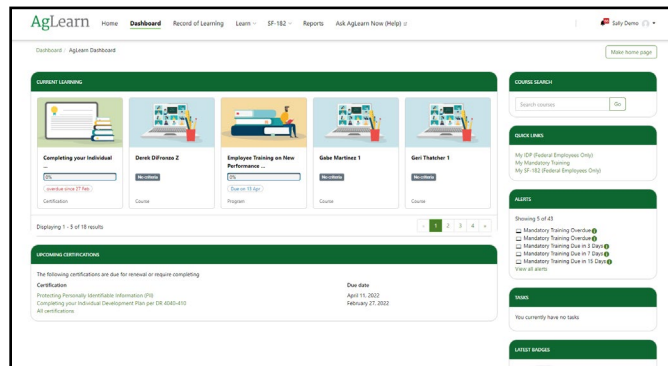
1.2 Navigation pages

1. The pages in AgLearn can be broken down into different components. The page components are described below.

2. Header – This is the top area of the page. It contains the AgLearn logo and your username. Clicking on your username will reveal additional options.
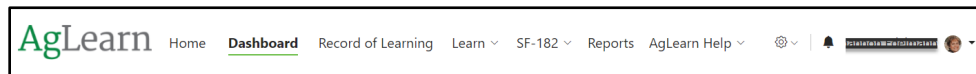
3. Main Menu – The first layer of navigation components. The main menu consists of links that are referred to as Tabs, which load essential site pages.
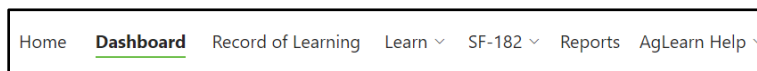
4. Breadcrumbs – These are located below the tabs. Breadcrumbs show you where you are and how you got there.

5. Breadcrumbs allow you to retrace the steps that brought you to your current page. They may not be present on some pages. In this example, we see that we came to UAT-Seminar by way of Courses from the Dashboard.

6. Blocks and Main Content Area – The content of the pages are loaded into Blocks. Some blocks are common and appear on nearly every page. Other blocks are dynamic and change from page to page, such as the main content area.
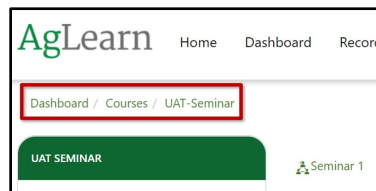
   a. Blocks group specific types of content and/or topics. They are located below the main menu tabs and the breadcrumbs. Blocks often contain the most expedited path to a section of navigation links to other parts of AgLearn.

7. The Main Content Area is a term used to describe the portion of the site pages that contains the information that the page is attempting to relay. This content is dynamic and changes from page to page.
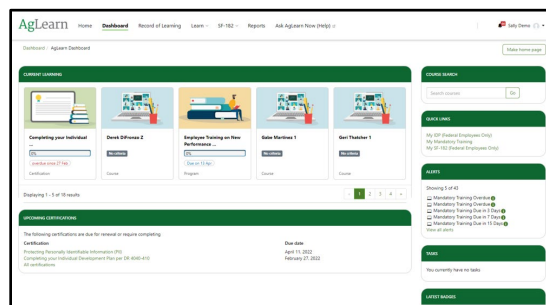
8. **Header and Footer** – The very bottom area of the page is referred to as the **footer**. The **footer** has several links, and a place to login and logout of AgLearn.

   a. Each Page has a Header. One of the important parts of the Header is the User Menu, which is located in the top-right corner as your name and appears on every page. Click your name to reveal the User Menu, which is made up of three links:

    i.   Your Profile - which contains your personal information.

    ii.   Preferences - where you can access settings to messages.

    iii. Notifications and the Log-out button.
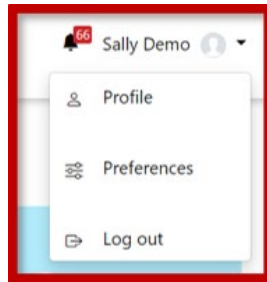
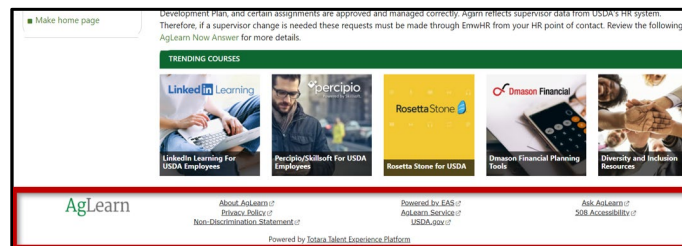b. The Footer is located on the bottom of every page and contains several links to additional information. It also provides another place to login and logout. As with other components of AgLearn, the footer may change from time to time. Links in the Footer may include:

    i.   About AgLearn

    ii.   Ask AgLearn

    iii. A link to USDA.gov

    iv. 508-Accessibility

1.3 Tabs

1. Based on your role, you may see more tabs in the Main Menu, but all basic users will have seven main tabs available:

    a. Home

    b. Dashboard

    c. Record of Learning

    d. Learn

    e. SF-182

    f.   Reports

    g. Ask AgLearn Now (Help)

Home	**Dashboard**	Record of Learning	Learn ⌄	SF-182 ⌄	Reports	AgLearn Help ⌄
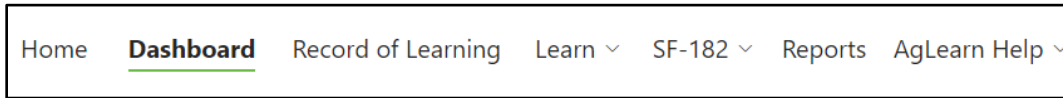
2. The Home Page Tab is the first page you will see when you log in to AgLearn, or anytime you select the home page tab from the main menu. From the Home tab you can navigate further into the site by either using Tabs or Blo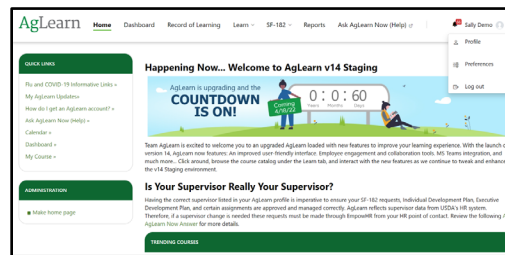cks, or if not logged in, by logging in to AgLearn. The main content area will be updated periodically. Notice that there are no breadcrumbs on this page.

3. The Dashboard tab contains information stored in blocks that is specific to the current user. For example, the Current Learning block, the Upcoming Certifications block, and the Quick Links block.
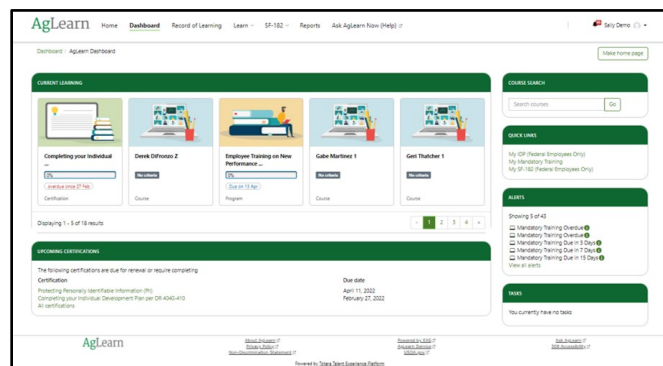
4. The **Record of Learning** tab contains a good deal of important information. By default, the page loads any course you have assigned or completed in the main content area.

5. The main content area in the Record of Learning tab potentially has four tabs:
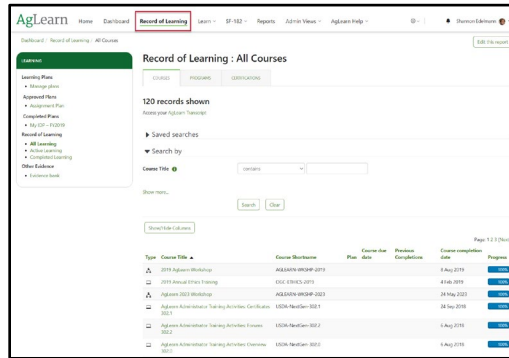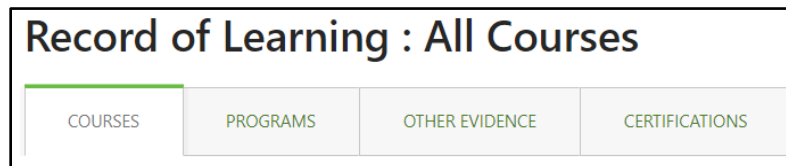
   a. Courses - displays all the courses available to you.

   b. Programs - displays the programs available to you.

   c. The Other Evidence tab - displays training outside of AgLearn.

   d. Certifications – displays information about your certifications.

Note - If you don't have content for a particular tab, it will not be displayed. This page also displays the Learning block, which links to additional pages that populates the main content area with different information when selected.

6. The Learn Tab now links the "Find Learning" page and "Your Library". To access the course catalog, you must select or click Find Learning from the Learn drop-down menu.
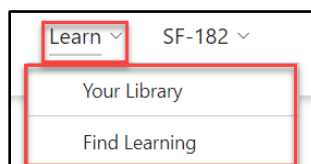
7. SF-182 is a federal employee tab and will only be available to federal employees.

8. The Reports tab provides access to reports like Transcripts, Bookings, Record of Learning and more.
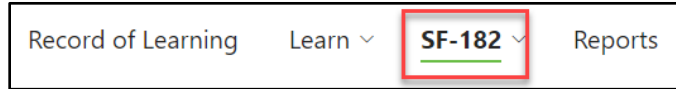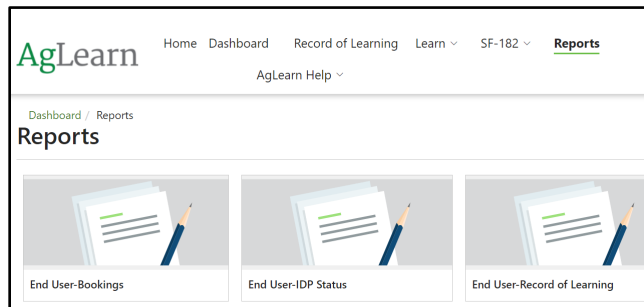

9. The Ask AgLearn Now (Help) link will take you directly to the AgLearn help site.
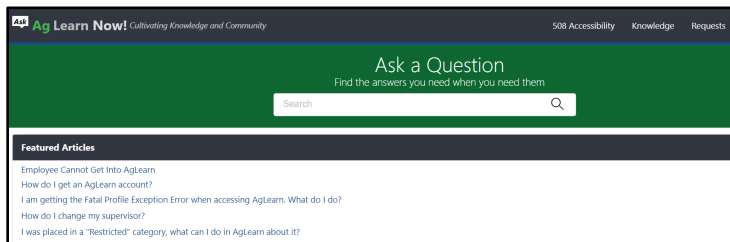
1.4 Blocks

Blocks group-specific types of content and/or topics and are located below the main menu tabs and the breadcrumbs. Blocks often contain the most expedited path to a section of navigation or links to other parts of AgLearn.

1. The Main Content Area of the Dashboard page contains the Current Learning and Upcoming Certifications blocks. The CURRENT LEARNING block displays the courses, programs, or certifications that you are currently working on.

2. The LEARNING block can be found on the Record of Learning page and contains links to All Learning, Active Learning, and Completed Learning. The **All Learning** link is the default when the Record of Learning page loads. This will show both active and completed work for Courses, Programs, and Certifications.
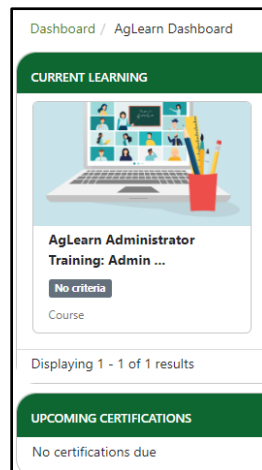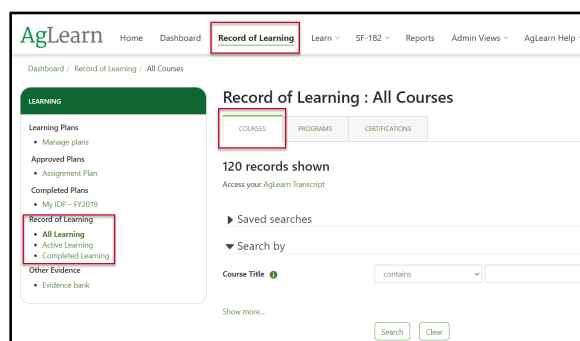

3. The Quick Links block is available on the Homepage and Dashboard. Its content will vary per page. These are some of the links:

   a. Ask AgLearn Now (Help): This is a link to the AgLearn help site.

   b. Calendar: This link takes you to an event calendar.

   c. Site Announcements: This link takes you to an announcements page.

   d. Dashboard: This is a link that returns you to your Dashboard page.

   e. My Course: Takes you to your learning plans. If you are a federal employee, it may also contain the My IDP and My SF-182 links.

QUICK LINKS AND RESOURCES

My AgLearn
  My Calendar 🔒
  My Dashboard 🔒
  My Courses 🔒
What is happening in AgLearn?
  General News and Site Announcements
  AgLearn Summer Newsletter 2023
Need Help with AgLearn?
  General AgLearn Support
  How do I get an AgLearn account?
  What to do if you can't log into AgLearn
 AgLearn Agency Tier 1 Support Contacts
  Ask AgLearn Now 🔒 ⧉
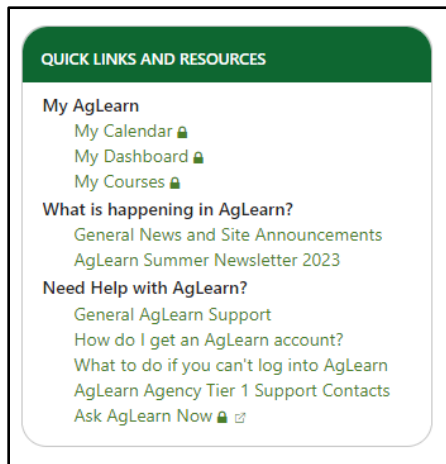
4. As **AgLearn** continues to grow with the needs of its users, blocks may change, move, get added, or even removed. Blocks drive changes to pages and can load all new pages.

1.5 Site Page

Site pages contain content information.

1. The calendar page displays four events:

   a. Global events, which are created by administrators and are viewable in all courses.

   b. Course events, which are either created by trainers or are a result of setting closing dates for course activities, such as assignments and quizzes. These events are only viewable by course participants.

   c. Group events are created by trainers and are only viewable by members of that group.

d. User events, which are personal events that you can create and are only visible to you.
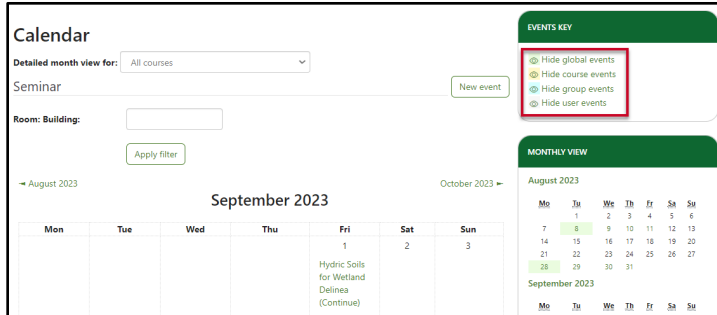

2. Another site page is the Site Announcement page. This is where you can find general news and announcements about AgLearn. This might include new features, upcoming dates, or planned outages.
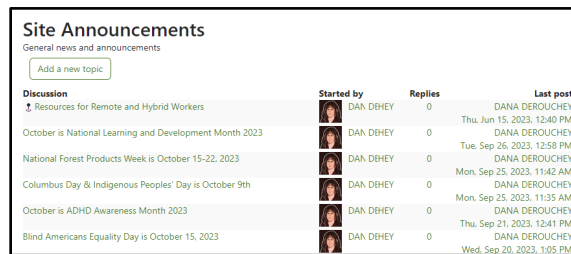
3. Learning Plans page shows you the status of any plan assigned and provides you a link to go dive deeper into your plan. Plans are important, as this is where you will find your individual development plan (IDP), or an executive development plan (EDP). You will also see a "generic" Assignment Plan; this is needed so you can self-assign Programs.
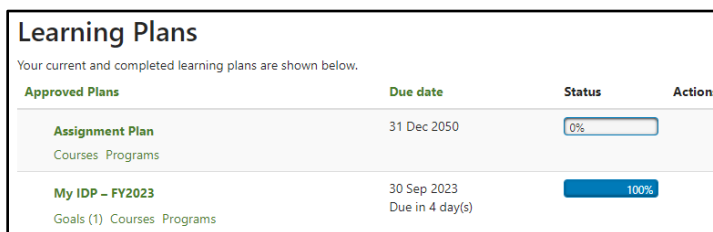
Section 2 – Managing your Profile

2.1 Personal Information

1. Most of your personal information comes to AgLearn from the official USDA human resources system. This information is fed automatically into AgLearn and is updated several times a day.

2.2 Verifying Your Email

1. To get started, both your email address and supervisor are found under your **Profile** page. To get there, select your user name from the main menu on any page, then select the **Profile** link from the drop down menu.
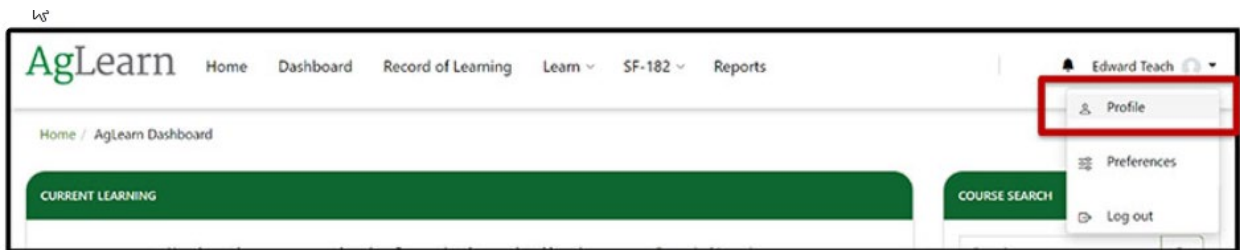
2. In the main content area of your **Profile** page are your **User details**. The first field is your email address.

NOTE: Your email address is provided to AgLearn. If it is incorrect, and you have an EAD email, it will need to be corrected in Active Directory by an IT admin from within your agency. If you do not have an EAD email you can change it in your eAuth profile. Once corrected there, the change will automatically flow to AgLearn.
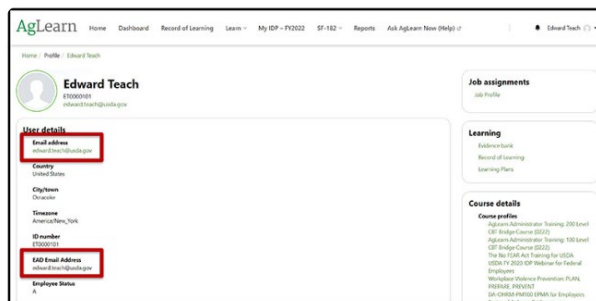
2.3 Verifying Your Supervisor

1. First you need to understand why it is so important to have the correct supervisor. It is important because:

    a. It allows your supervisor to see you in their **Team** tab.

    b. A supervisor is needed for the SF-182 approval process.

    c. A supervisor must approve learning plan - assignments, planning, and feedback (IDP, EDP, etc.) activities.

    d. A supervisor may make Program Assignments.

2. Just as with verifying your email, access your **Profile** page to get started.
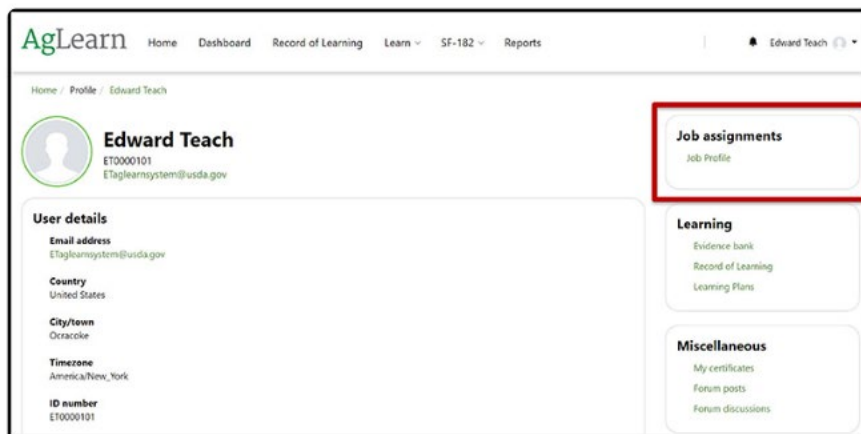
2.4 Job Assignment

1. Once your **Profile** page loads, move to the **Job Assignments** section. Select **Job Profile**. This will take you to the job assignment page.
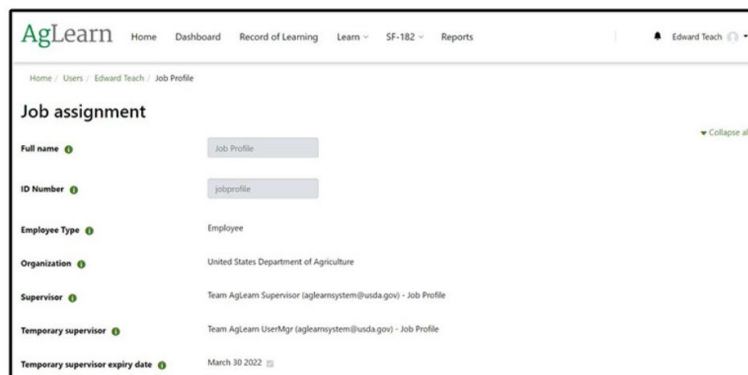
2. The **Job Profile** page allows you to check for your assigned **Supervisor**.

3. If you are a federal employee and your supervisor data is incorrect, you will need to have it changed in your agencies' HR system. Once corrected the data will automatically flow to AgLearn. For contact information based on agency please review the linked knowledge base article: How do I change my Supervisor?

NOTE: For a short-term solution, you can have a **Temporary supervisor** assigned.

    a. There are three options for getting the correct one assigned:

    b. Notify the incorrect supervisor and they can select a temporary for you.

    c. Notify your correct supervisor.

    d. Notify your local AgLearn Administrator.

4. A **Temporary supervisor** functions exactly the same as the supervisor, but it does have an expiration date.

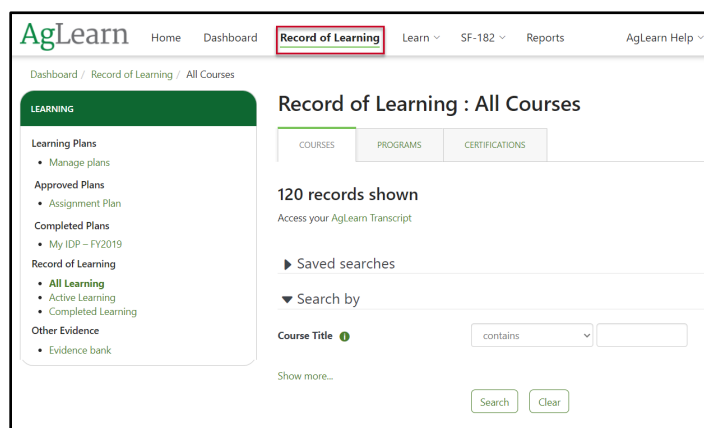# Section 3 – Viewing your Learning.

3.1 Record of Learning

1. You can find the Record of Learning page from the main menu on the Record of Learning tab. This page contains a lot of important information, such as your current courses, programs, and certifications, as well as the Learning Block.

2. The Learning block consists of four main sections:

   a. Learning Plans, where you can find a link to manage your plans and see approved and unapproved plans.

   b. Required Learning, which provides links to programs and certifications that are due. If nothing is due, then the section will be blank.

   c. Record of Learning, where you can see all of your active and completed learning.

d. Other Evidence, which contains legacy evidence of training received outside of AgLearn.
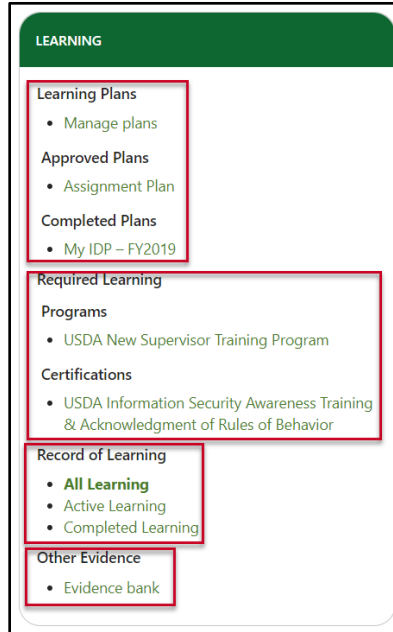
3.2 Learning Plans section.

1. To see your Learning Plans page, select the Manage Plans link.

2. Then you can see your active plans, as well as your Individual Development Plan (IDP) or your Executive Development Plan (EDP) if you are a federal employee.


3. The Courses link, located under your Assignment Plan, brings you to a list of your courses within your Assignment Plan. You can see the Course Name, Progress, Evidence, Due Date, any comments, or delete the course under the Actions heading for each course listed.

4. You can also add courses by selecting the Add Courses button. This will allow you to browse or search for courses.
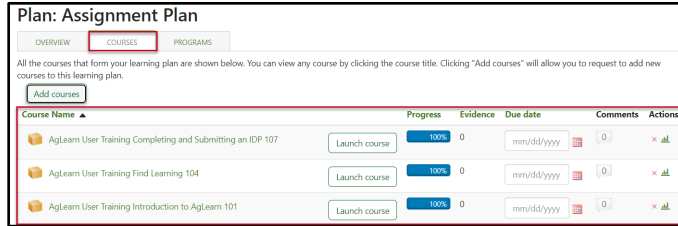
5. To access Programs, select the Programs tab under Assignment Plan. You can see the Program Name, Progress, Evidence, Due Date, any comments, or delete assignments from the list.
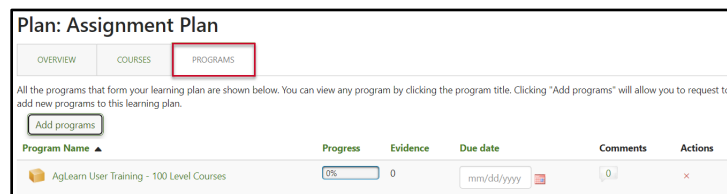
6. You can also add programs by selecting the Add Programs button. This will allow you to browse or search for programs.

7. Once you have found the program, select it, and add it to your Learning Plan by clicking the Save button.
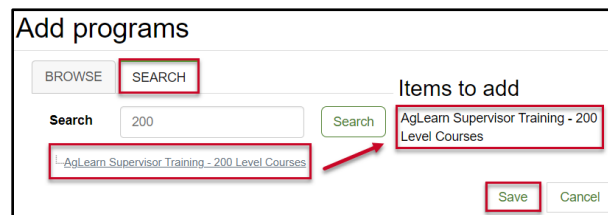
3.3 Record of Learning

1. The Record of Learning section within the Learning Block provides links to All Learning which includes Active and Completed Learning.

2. Selecting **All Learning** will list all of your **Courses**, **Goals**, **Programs**, **Other Evidence**, and **Certifications** beginning with the Courses tab. You may not see all tabs if there is no information for them.

3. The courses tab includes a search area and the ability to configure your display using the Show/Hide Columns buttons. Course information includes the Type of course, Course Title, Course Short Name, Plan, Course Due Date, Previous Completions, Course Completion Dates, and Course Progress. You can sort the list by clicking on any of the column titles and you can use the Export button at the bottom of the list to export to a CSV, Excel, or PDF file.
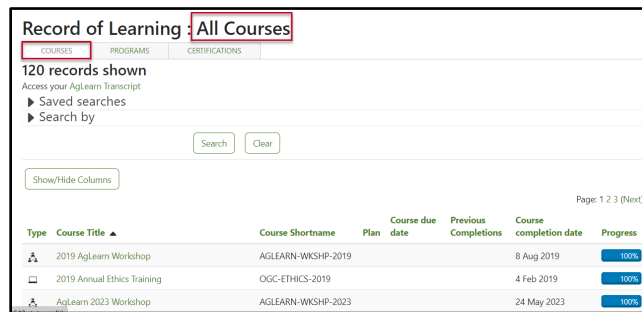
4. The **GOALS** tab lists all goals associated with your Learning Plans. Each tab has the Standard Search and Show/Hide columns functionality, as well as the ability to Export the data at the bottom of the results. The Goals tab displays the Plan, Plan Status, Goal Name, Goal Description, Priority, Due Date, and Status for each goal. The Plan Status indicates if the plan has been approved or not while a Plan Status of Complete indicates an IDP

from a previous Fiscal Year. Alternatively, the Goal Status can be Not started, In progress, or complete.

5. The **PROGRAMS** tab list programs associated with your Learning Plans beginning with the Program Name, an indication that the Program is Mandatory or Recurring, its Due date or Status, any previous completions, program progress, date started, and date completed.

6. The **OTHER EVIDENCE** tab contains legacy evidence of training received outside of AgLearn and lists evidence by Name and Type. Evidence can be edited or deleted and like other Record of Learning tabs the data can be exported to a CSV, Excel, or PDF file. You can also find the **Evidence bank** link in the **Learning block** in the **Other evidence** section.
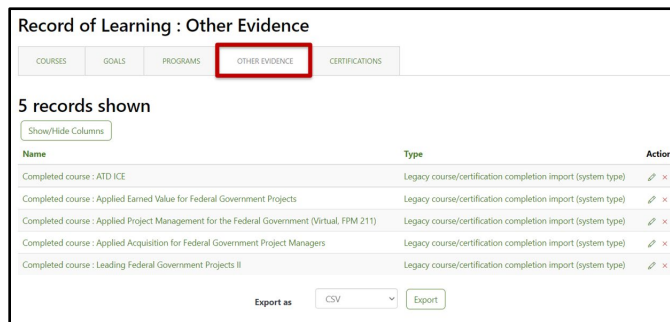
7. The Certifications tab displays your certifications. A certification is a recurring training requirement. This tab lists each certification name, due date, status, renewal status, expiration date, completion date, any previous completions, and current progress for each certification. Status values are In Progress, Not Certified, and Certified, while the Renewal Status indicates if the certification is due for renewal or not.
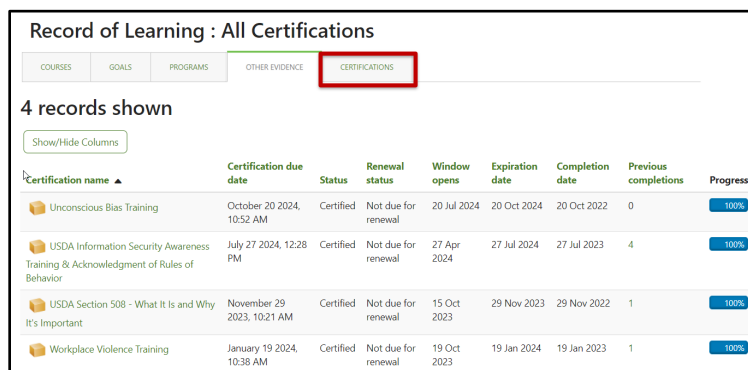
3.4 Active Learning

1. Active Courses page - lists only active courses, goals, programs, other evidence, and certifications, such as in-progress or not-yet-started courses with all the same tabs and fields as the **All Learning** page.

2. Completed Learning link takes you to the Completed Courses page. This page lists only completed courses, goals, programs, other evidence, and certifications again with the same tabs and fields as the All Learning page.

3. The Evidence bank link can be found at the bottom of the Learning Block under Other Evidence. The **EVIDENCE BANK** allows you to add evidence of training received outside of AgLearn. This evidence can be a description of the evidence and/or files (such as a PDF).
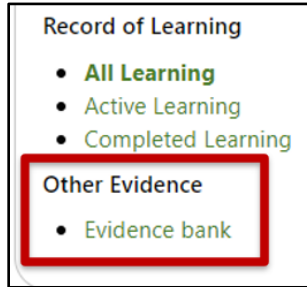
4. The **EVIDENCE BANK** includes an **Add evidence item** button, so you can add evidence from other completed courses outside of the system. Evidence data includes the Name, Type, Creation Date, Creator, an In Use indicator, and the ability to edit, delete, or export the evidence items.
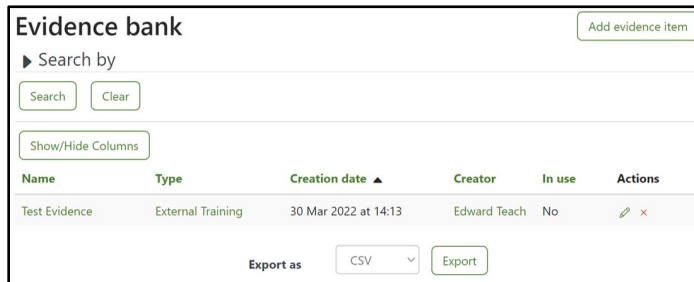
   a. To add evidence to the Evidence bank, select the Add evidence item button.

b. Then select the type of evidence from the Evidence type drop-down menu.
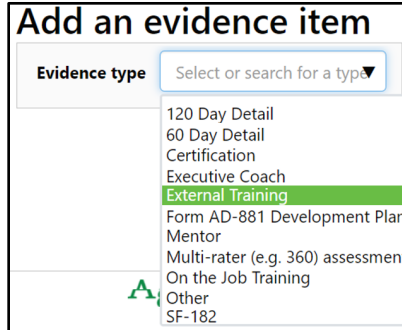
c. Select the Use this type button to confirm, or the Cancel button to cancel your evidence type selection.
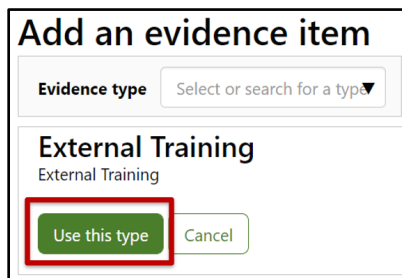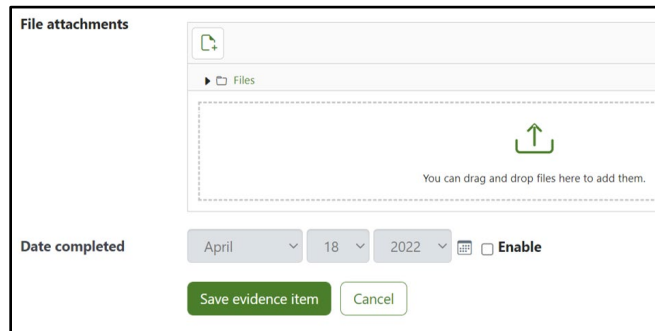
5. Next enter the name and description of the training into the Evidence name and Description fields. Add any relevant files, such as an image of a certificate, to the File attachments field by dragging or browsing for it.
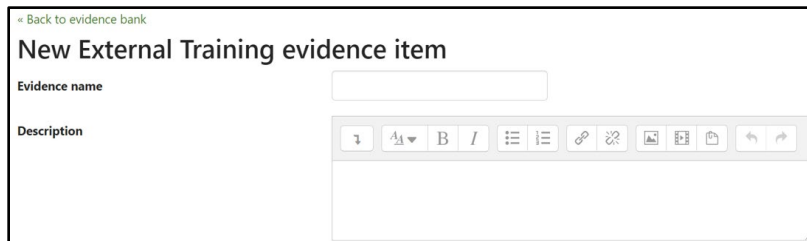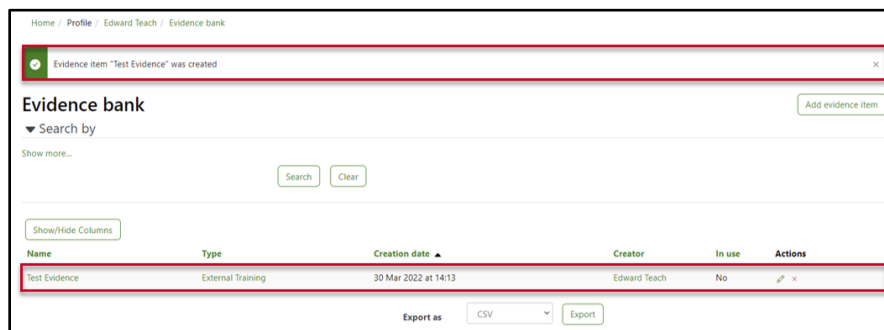
a. To enable the Date completed fields select the Enable check box, then use the calendar icon or the month, day, year, drop downs to specify the date.

b. Select the Save evidence item button to confirm the creation of the evidence item or the Cancel button to cancel creating the evidence item.

c. The Evidence bank list will be refreshed, and a confirmation notification will be displayed along with your newly created evidence item.

Section 4 – Find Learning

4.1 Find Learning

1. The Find Learning link is located under the Learn Tab on the drop-down menu.
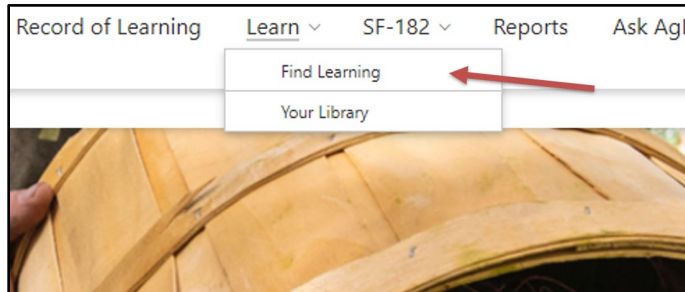
2. Once selected, the course catalog or find learning page is displayed. This is where a user may find and search the large variety of learning that is available on the AgLearn site.
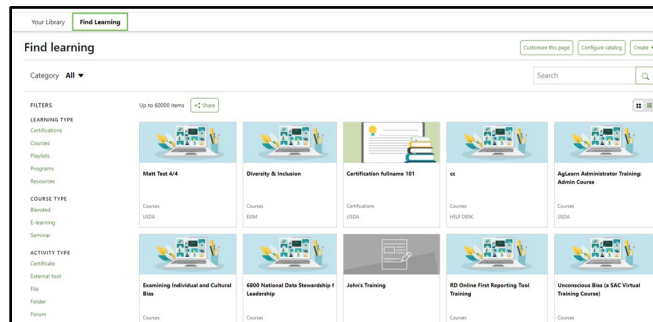
3. From here you can filter by a variety of criteria to find the learning that you desire. There are many ways to Filter the available learning.
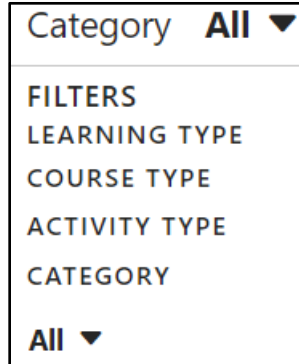
4. By selecting the Category drop down menu, you can search for courses by category. You will only be able to select your assigned categories.
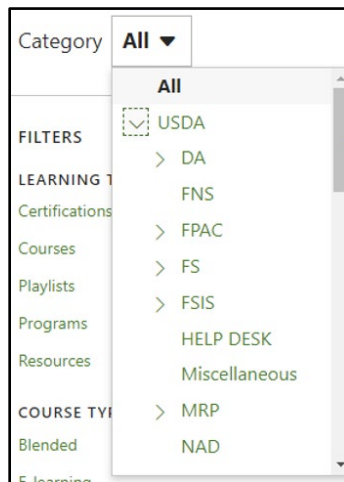
5. You can also Filter by Learning Type. The five options under Learning Type are:

    a. Certifications – A prescribed learning path made up of one or many courses with "and/then/or" conditions for completion.

    b. Courses – A single learning environment for enrolled learners containing content in the form of one or more Activities and Resources.

    c. Playlists – A number of AgLearn Engage resources that are put together in a list.

d. Programs – A prescribed learning path made up of one or more courses with "and/then/or" conditions for completion.

e. Resources – Resources are one of the contributions users can create in AgLearn Engage. Resources are a way that users can share articles, videos, and links with colleagues.
You can also Filter by Course Type.

LEARNING TYPE

Certifications
Courses
Playlists
Programs
Resources

6. Another way to Filter Learning is by Activity Type. The options are:

a. Certificate - An electronic award of achievement based on a traditional paper-based Certificate layout.

b. External Tool - Includes content from external LTI tool providers.

c. File – Includes a file as a course resource.

d. Folder – Includes a folder with several course resources together.

e. Forum – An activity where learners and trainers can exchange ideas by posting comments.

f. Quiz – A Quiz activity may consist of a large variety of Question types about the Course or Seminar content.

g. SCORM Package – Includes an online course.

h. Seminar – A face to face activity.

i. Survey - A survey related to the Course or Seminar content.

j. URL – Includes a link to a website or online file.

ACTIVITY TYPE

Certificate
External tool
File
Folder
Forum
Quiz
SCORM package
Seminar
Survey

URL
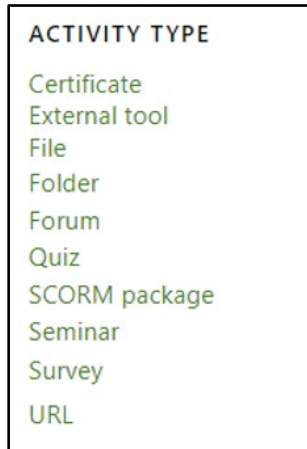
7. You can select multiple filters. Filters within the same type add additional results, while adding filters of different types reduce the number of results.

ACTIVITY TYPE

Certificate
External tool
File
Folder
Forum
Quiz
SCORM package
Seminar
Survey

URL
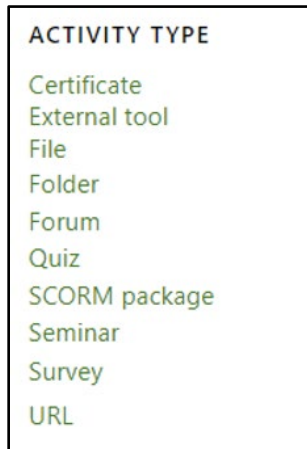
8. In addition to using filters, you can use the Search feature to Find Learning within your filtered results.
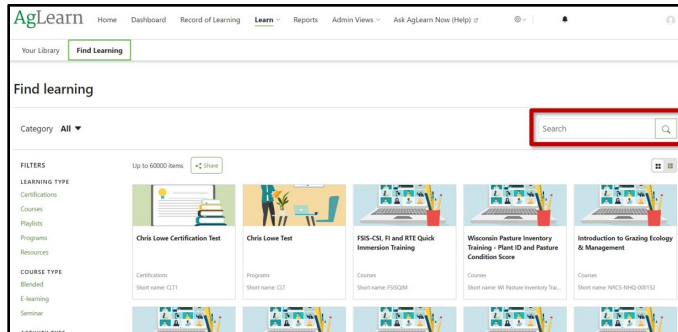
9. The main content area of the Find Learning page will be populated with courses available to you.

10. The Search section, just above the results area, allows you to enter a search term and then select the Search button to find a specific course or courses in your results.
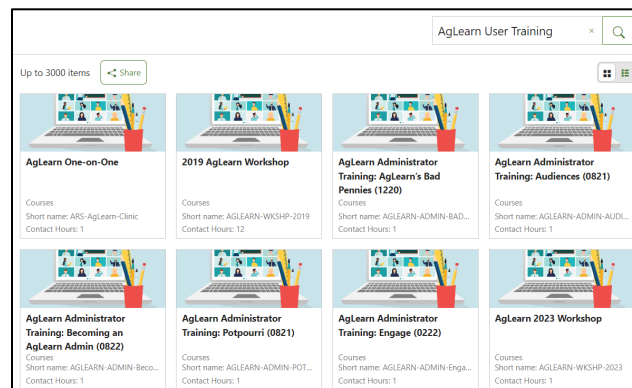
11. Selecting the "X" in the search bar will clear the search box and return all available certifications, courses, playlists, programs, and resources.
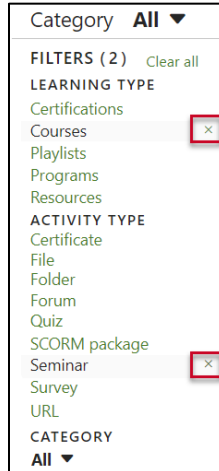
12. You can change how the results are displayed by choosing the tile or list view on the results area of the page.

13. You will find the "Tile View / List View" toggle switch near the top of the results area.
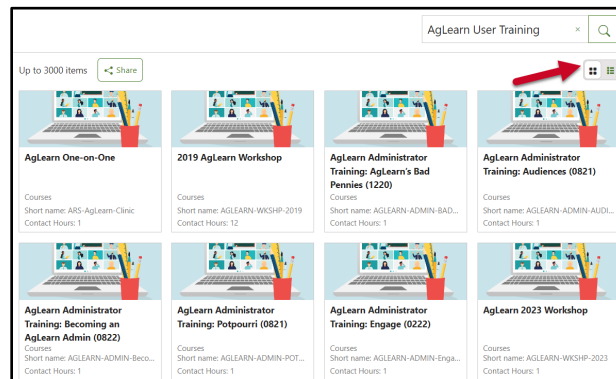
14. The Tile View contains the Learning Name, Learning Type (Certification, Course, Playlist, Program or Resource) and the Course Short name on tiles in rows, while the list view displays the results information in a list.

4.2 Enrolling in Courses or Seminars

1. Once you've located your desired course and have selected the course tile, you will see an Enrollment Options page. Select the **Enroll me** button to enroll into the course.
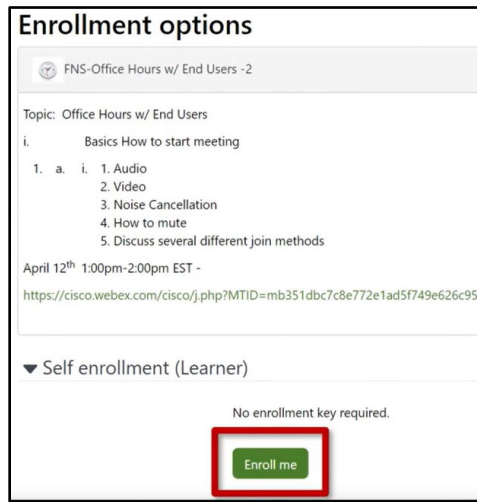
2. Congratulations, you've been enrolled!

3. Make sure you enroll in an online course before completing it, or you may not receive credit upon completion.

4. Next, let's look at enrolling in a seminar.

   a. To enroll in a Seminar, or an instructor led course, select the Seminar option, then select your desired course under Course Name by selecting the tile or title link.
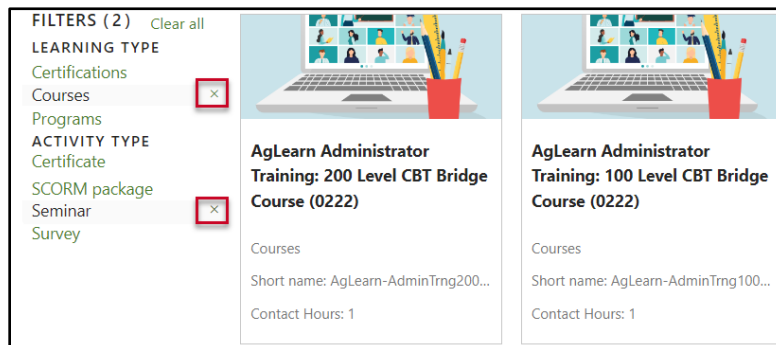
5. After selecting a course, you will see an Enrollment Options page.

    a. Select the Enroll me button to enroll in the seminar.
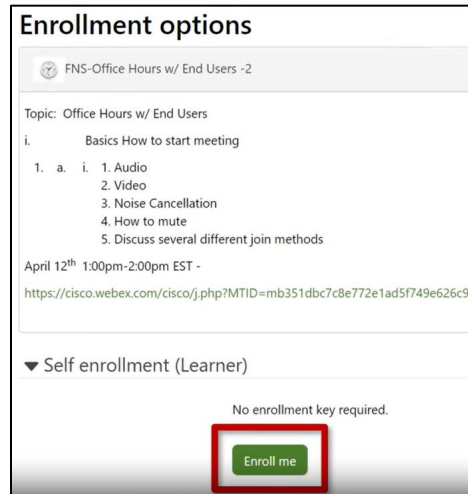
    b. To continue your enrollment, select the View all events page to find the event that best fits your schedule.
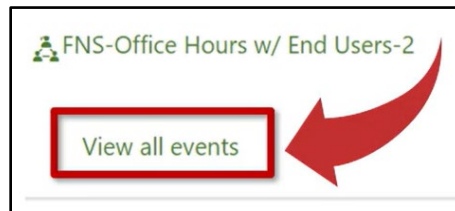
    c. Select the Go to event button to finish enrolling in your Seminar, this will display the Sign-up page for the event.
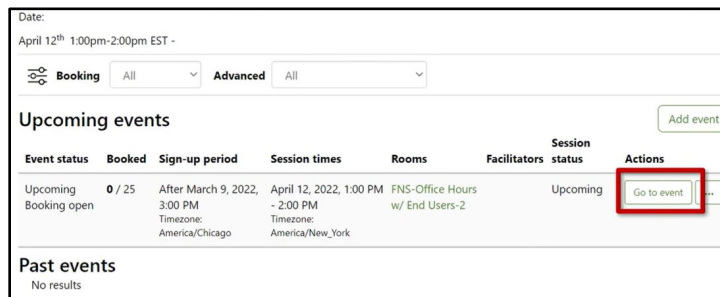
d. Complete the information in the sign-up block with any Requests for the session organizer field, and your desired Receive confirmation by option then select the Sign-up button.
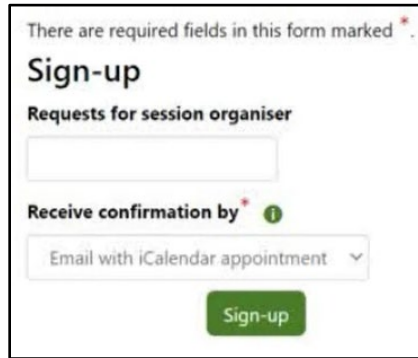
6. A message will appear at the top of the screen confirming your booking into the event.
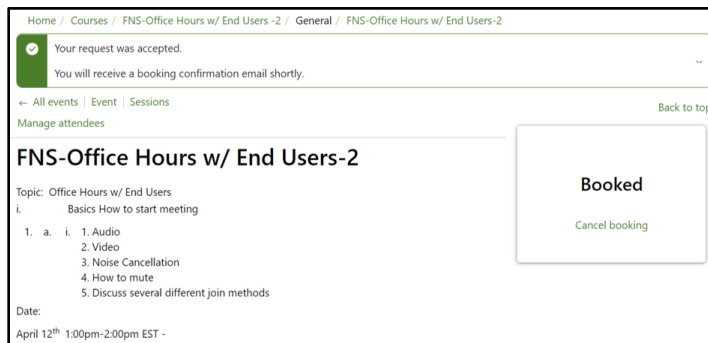
7. You can also cancel a booking. To do so, click the Cancel booking link under Options.
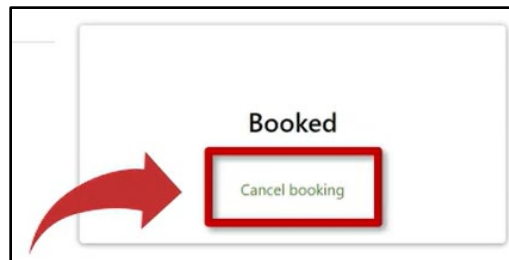
a. Fill in the cancellation note field if you want to provide a reason for the cancellation.
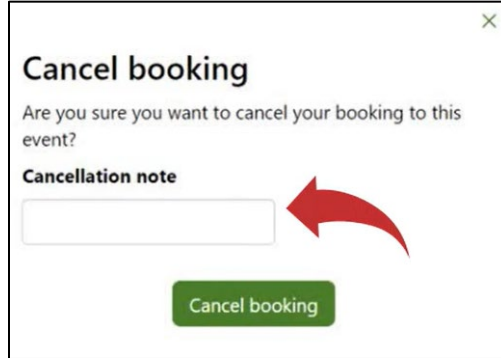
b. Then click the Cancel booking button.
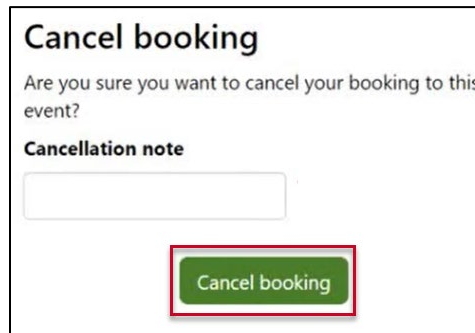
8. A message will appear at the top of the screen confirming that your booking has been canceled.

Section 5 – Taking Online Courses

5.1 Accessing your Record of Learning

1. The Record of Learning tab is located on the main menu at the top of all pages in AgLearn.

a. Select the Record of Learning tab to access your learning.
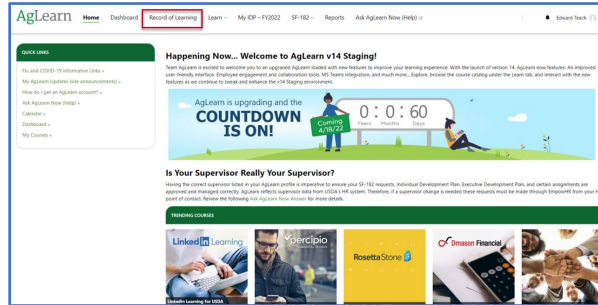
2. After selecting the Record of Learning tab, locate the Learning block.

a. Select the Active Learning link under Record of Learning.

5.2   E-Learning and Blended courses

1. E-Learning courses - An important consideration when taking an eLearning course is choosing a modern web browser. Please be sure to take your courses with either Microsoft Edge or Google Chrome browsers for best results. **Do not use Microsoft Internet Explorer, as it is not compatible with HTML5 content.**

2. The Active Learning page displays courses in the main content area. E-Learning type courses have the computer monitor icon in the Type Column next to the course link.

Type	Course Title ▲	Course Shortname	Plan	Course due date	Previous Completions	Course completion date	Progress
🖥	AgLearn Administrator Training: 100 Level CBT Bridge Course (0222)	AgLearn-AdminTrng100LvlBridge(0222)	Assignment Plan			30 Mar 2022	100%
🖥	AgLearn Administrator Training: 200 Level CBT Bridge Course (0222)	AgLearn-AdminTrng200LvlBridge(0222)	Assignment Plan				0%
🖥	AgLearn Administrator Training: 300 Level CBT Bridge Course (0222)	AgLearn-AdminTrng300LvlBridge(0222)	Assignment Plan				0%
🖥	AgLearn Administrator Training: 400 Level CBT Bridge Course (0222)	AgLearn-AdminTrng400LvlBridge(0222)	Assignment Plan				0%
🖥	Basics of AgLearn Bridge course	AgLearn-v14-BOA-Bridge					0%
🖥	DA-OHRM-PM100 EPMA for Employees	DA-OHRM-PM100					0%
🖥	Eva Test	Eva-Test	Assignment Plan				0%
🖥	Section 508: What It Is and Why It's Important?	USDA-GSA-508-FAC049					0%

a. Select the course title you wish to access.

b. Selecting the course link will launch the course if you are already enrolled.

c. If you are not enrolled in the course, the Enrollment options page will appear.

d. Select the Enroll me button to enroll yourself in the course.

Enrollment options

📁 Basics of AgLearn Bridge course

This course is created for experienced AgLearn Administrators who are familiar with AgLearn
In this bridge course, the following objectives will be covered:
Basics of AgLearn
- Personal Information
- Record of Learning
- Finding Learning
- Creating and submitting an SF-182
- IDPs in AgLearn
- Using reports in AgLearn

▼ Self enrollment (Learner)

No enrollment key required.

[Enroll me]

Note: To receive credit for a course you must be enrolled.

3. Once you are enrolled, the course will launch.

4. Select the Activity title link to begin the course. Additional course details will be displayed along with the Enter button.
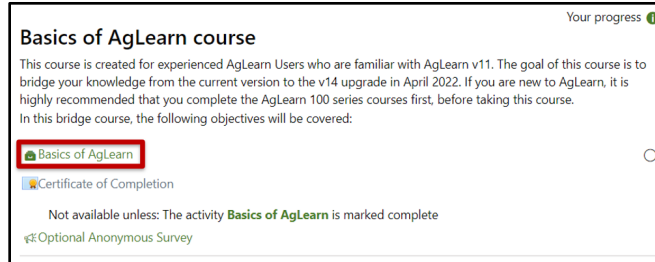
a. Select the Enter button to load the course activity.
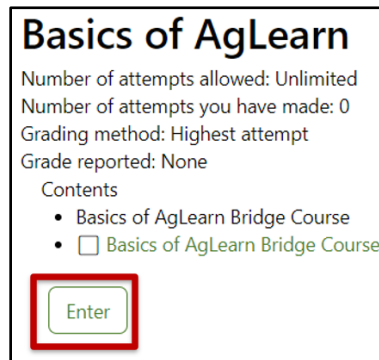
b. Select Start Course to launch your course.
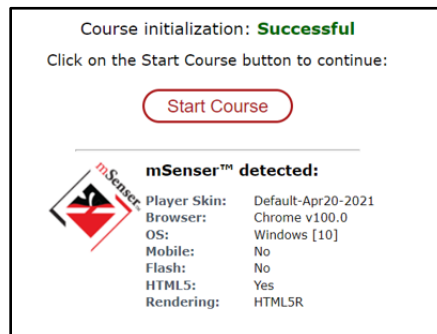
5. Once your course is loaded, follow the step-by-step guide through the course and answer all questions to ensure you receive credit for completing your selected course.

6. When you are completely finished, including passing all exams, the course will automatically be marked complete in AgLearn.

a. This completion process may take several minutes to process, depending on the complexity of the course.

b. If you have not completed the course, your progress bar will reflect the progress that you have made so far.

7. Blended Courses - Courses that are categorized as Blended in the Type column include both online activities and Seminars (instructor-led activities).

a. Blended type courses have the icon with a laptop and two people in the Type column next to the course link.

8. When a blended course has a Seminar activity, you will have to sign up for an event within the seminar activity.

a. Select the seminar activity you wish to sign up for.

b. The Sign-up block is displayed. You may add a note to the organizer in the Request for session organizer field.

c. Choose how you would like to receive confirmation from the drop-down selection.

d. Be sure to select the Email with iCalendar appointment option if you want to update your Outlook calendar with the event information.

e. Select the Sign-up button.

f. Select the Go to event button for the event that fits your schedule.

9. After signing up and attending an event, the instructor or an admin will have to mark you complete for that event.

10. You will also have to complete any additional required online activities for the course.

11. When all the activities are complete, the course will be marked as complete.

Section 6 – Create and Submit a SF-182

6.1 Create a SF-182

Federal employees can create an SF-182.

1. Before you begin, make sure your current supervisor is designated in your AgLearn Job Profile, since your supervisor is a required first-level approver of your SF-182.

2. To get started, locate the SF-182 drop-down menu on the main menu.
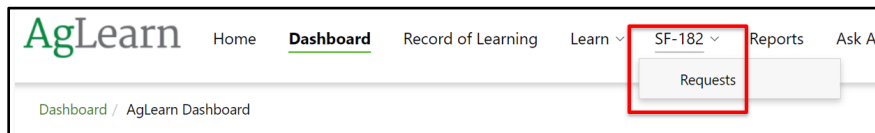
3. Select the Requests link, then select the New Request button.
   An SF-182 form has 3 sections for you to complete.
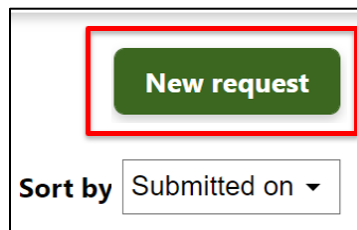
4. The first section is Section A, Trainee Information.

   a. The only mandatory field in this section is Position Level. You should select the one that reflects your position level status from the drop-down menu.

   b. The other information in this section is filled in automatically from your AgLearn profile.

5. After selecting your Position Level, scroll down to Section B or Click on Section B in the Form sections block to enter the Training Course Data. As always, Mandatory Fields are marked with an asterisk.

   a. Training course data includes vendor, title, start and end dates, course type, cost, location, and travel information where applicable.

   b. You can either manually enter the vendor and training site location information or search for existing vendors.

      i. Existing vendor data can be changed after searching.

      ii. To search the list of existing vendors, select the Search Vendor button.

      iii. The Search vendor window will appear. Enter your search terms such as city, state, or vendor name. In this example, we entered the city of Denver. The vendor list will narrow as you enter characters.
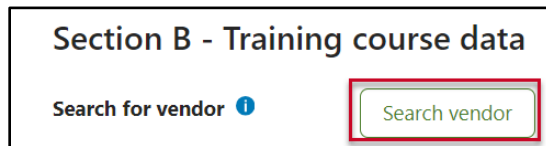
   c. A list of vendors that match the search term you entered will appear.

      i. To choose the vendor, select the Select button associated with that vendor.

      ii. Your form will be populated with the selected vendor information. If you wish to change any of this information, you can edit it before continuing.

   d. Once you have completed the vendor information, you must enter the required fields for the course information: Course Title, Training Start Date, Training End Date, Training Duty Hours, and Training Non-Duty Hours.

e. The training purpose, type and credit values all use drop-down menus to make your selections.

   i. When you select an option from these drop-down menus, it may change what is available in the next drop-down menu.

   ii. If a choice is unavailable, it will be grayed out, and you will not be able to select it.

Section B - Training course data

Course title *	
Training start date *	
Training end date *	
Training duty hours *	0.00
Training non-duty hours *	0.00
Training purpose type * ⓘ	Select one

f. The last two mandatory fields in section B are Training Accreditation Indicator and Continued Service Agreement Required Indicator. Please make sure to change your selection for Continued Service Agreement Required Indicator to Yes if required.

Training accreditation indicator *	Select one
Continued Service Agreement required indicator * ⓘ	N/A

6. Scroll down to Section C or Click on Section C in the Form sections block to enter the Cost and Billing information.

   a. The mandatory fields for this section are Tuition and Fees, Books & Materials, Travel, and Per Diem.

      i. The form will automatically total after each pair of entries.

      ii. If there are no costs associated with an item, enter zero.

b. Next, add any Travel and Per Diem costs, again, enter zero if there are no associated costs. The form totals will update after entry.

Section C - Costs and billing information

Direct costs and appropriation/fund chargeable

Tuition and fees *	$	0.00
Books & material costs *	$	0.00
Travel *	$	0.00
Per diem *	$	0.00

7. While the form contains no other mandatory fields, some agencies require billing information to be entered into the SF-182. For these agencies, you must enter:

    a. Document/Purchasing Order/Requisition Number

    b. 8 – Digit Station Symbol

    c. and/or Billing Instructions.

8. You can either Submit the form for approval now or Save as draft to be edited later. If you Submit it now, it will go to your approvers for review.

Submit   Save as draft
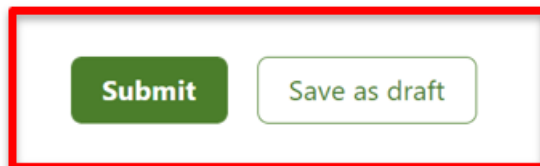
9. You can save your form entries any time as a draft, but you can only submit the form when all required data has been entered.

    a. When you Submit, the form data will be validated before proceeding.

    b. If there are errors, you can scroll down for the specific error. In this example, Position level information was not provided. Scroll through the form to find the section outlined in red to identify missing information.

c. Enter the information and then select Submit or Save as draft.

Section A - Trainee information

Applicant's name	Team AgLearn User
Position level * ⓘ	Select one ▼
	Required

6.2   Edit a Draft SF-182

1. You can edit a draft SF-182 that you have not submitted for approval.

    a. To do so locate the SF-182 drop down in the menu bar and select the **Requests** link.

    b. Select the Request ID of the draft SF-182 you would like to edit from the list.

    c. **Draft** will appear in the **Overall Progress** column of the page.

Request ID	Request title	Request type	Submitted on	Overall progress	
SF-18220220214103745LFEP	TA Test 2-14-2022	SF-182		Draft	...

    d. After you have made your changes, you can either select **Submit** to send the SF-182 for approval now or **Save as draft**.

    e. If you **Submit**, then it will go to your approvers for approval.

Submit | Save as draft

6.3   SF-182 Submission

1. Once you have completed your SF-182 form to your satisfaction you will need to submit it for approval. At the bottom of the form select **Submit**.

Submit | Save as draft

2. After selecting the submit button a dialogue box will appear where you will have to select the **Submit** button again to finish the process. Alternatively, if you did not want to submit it you can select **Cancel**.

Submit request?
Are you sure you want to submit the request? Once submitted, your request will be visible to others.

Submit | Cancel
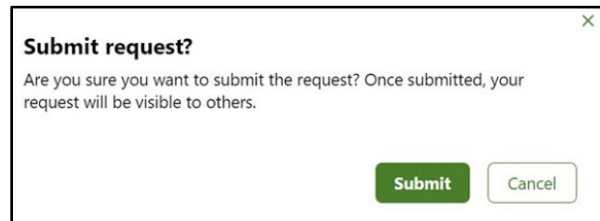
3. When you select **Submit** the screen will refresh and provide a notice that the **Request submitted successfully**. You will get an alert and an email notifying you that the SF-182 has been submitted to your Supervisor for approval.

✓ Request submitted successfully ✕

6.4   SF-182 Payment

1. Once your SF-182 form is approved through the Level 4 approver you will receive an alert and an email notifying you that the SF-182 has been approved by the Level 4 approver/final approver.

2. You must then follow your agency policy to have your SF-182 request for training paid for. There is no payment mechanism attached to the request in AgLearn. That portion of the process happens outside of the AgLearn system.

3. You will then return to AgLearn after the training dates have passed to verify your attendance.

6.5   How to Check SF-182 Form Status and Pending Approver

1. After you submit your SF-182 form for approval. You can login and check back any time to see the status of your form.

   a. In the Actions tab the Stage and Status will be listed. You will also see, depending on where the SF-182 form is in the process, a link to select **View Immediate Supervisor approvers**, **View Second-level approvers**, **View Third-level approvers**, **View Fourth-level approver**.

b. When you select this link, it will bring up a window that shows you a list of who the form is pending approval with. The image below is of an SF-182 form that is pending Supervisor approval.
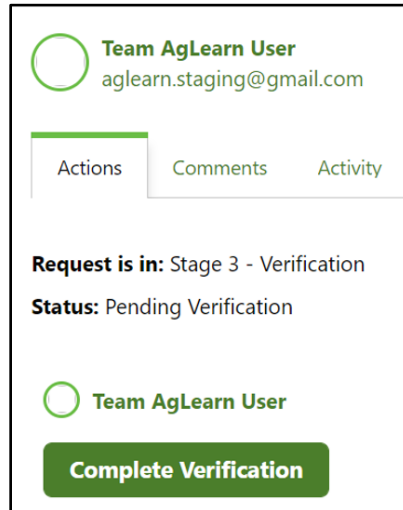
6.6   Immediate Supervisor Approvers Window

1. The window will list the approvers who have access to act on this SF-182 form. The list for Supervisors can be one or two people.

2. If there are two, this means the user has a Temporary supervisor assigned in their Job Profile. For Levels 2 – 4 it can be more than one person listed along with their email address.

6.7   Approval Stages

1. **Stage 1 – Request Approval –** means the request is in the approval process. Supervisor = Level 1, Level 2 – 4 are the approvers identified by the agency.

    a. **Reminder:** After Level 4 approval employees must then follow your agency policy to have your SF-182 request for training paid for.

b. There is no payment mechanism attached to the request in AgLearn. That portion of the process happens outside of the AgLearn system.

2. **Stage 2 – Training –** means the request is waiting for the user to attend the training class and the training dates to pass.

3. **Stage 3 – Verification –** means the training dates have now passed and the SF-182 form is ready to be verified. The employee verifies, they did or did not attend the class. Then their supervisor verifies.

4. **Completed –** The Actions tab will reflect "This request is completed on [Date and time stamp], and there are no further actions."

6.8 Withdraw Request

1. To withdraw an SF-182 form from approval select the three dots to see the More actions menu. Select **Withdraw**.

2. However, depending on where the SF-182 form is in the approval process you may not be able to withdraw it.

3. The "Withdraw request" Window will appear asking "Are you sure you want to withdraw the request?". To continue select **Withdraw** again, or if you have changed your mind select **Cancel**.

4. The window will refresh and provide a notice that the **Request withdrawn successfully**. The form will then be sent back to 'Draft' status in your queue.

> ✓ Request withdrawn successfully   ✕
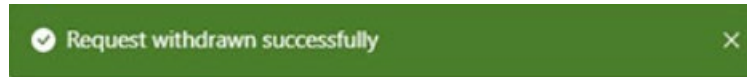
6.9 Submit Verification

1. Once your SF-182 form has been approved and the training dates have passed, you will receive a notification to verify your attendance.

   a. To Submit Verification, select the SF-182 drop down from the menu and then the Request link.
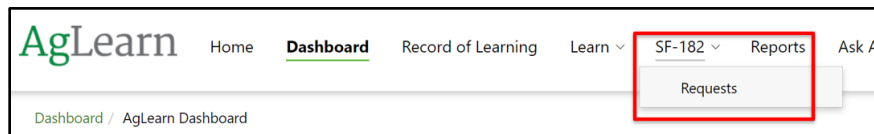
   b. Locate your SF-182 and select the Request ID for your request. The Overall progress column should state In progress.

   c. Verification in this context is simply an acknowledgement that the training events did or did not occur.

Request ID	Request title	Request type	Submitted on	Overall progress	
SF-18220220214103745LFEP	TA Test 2-14-2022	SF-182	02/14/2022	In progress	...

   d. The SF-182 form will appear. Select the Complete Verification button.
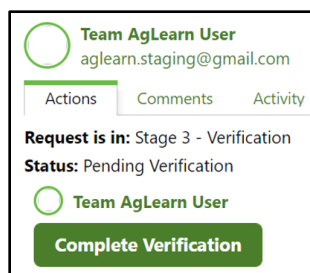
   e. Please Verify Course Completion window will appear. This asks the question "Was the training event attended/completed Satisfactorily?" The drop-down box offers the choice of selecting Complete (the

default) or Incomplete, along with the option to add evidence and comments.

2. When Adding evidence:

   a. You may add evidence in the form of comments in the Add evidence field.

   b. You may also add attachments, such as a certificate of completion from the training provider, to the Add evidence field using the paperclip option.


   c. Add any comments you would like to provide and select Submit.

3. The main form will display. A status will be viewable and Section F - Certification of training completion will show a Completion status of Complete and Add evidence with any comments or attachments that were added.

4. Your My SF-182s page will show an overall state of In Progress.

    a. To check status, select the request title.
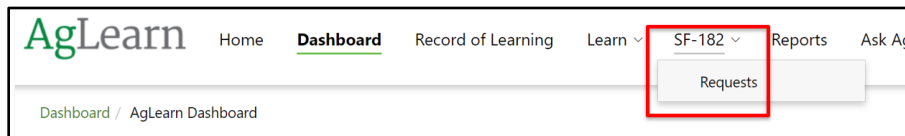
    b. You will receive a notification that your SF-182 has been submitted to your Supervisor for verification.

5. Once your Supervisor completes their verification, the page will display Completed under the Overall progress column. You will receive an email notifying you when this step is complete.

6.10 Printing SF-182s

1. To print, select the form title link under the **Request ID** column. In the form select the button with the three dots. A drop down will appear where you can select **Print preview**.
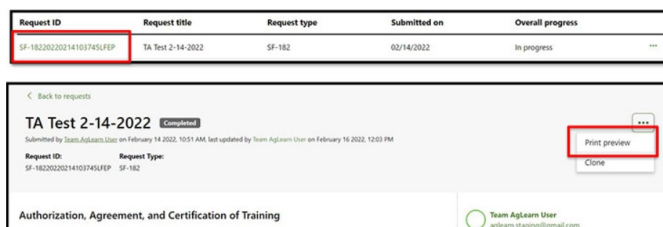
2. This will take you to a preview where you will find a **Print** button. When in your browser's print dialogue box, you may choose to print to a printer or to a PDF.
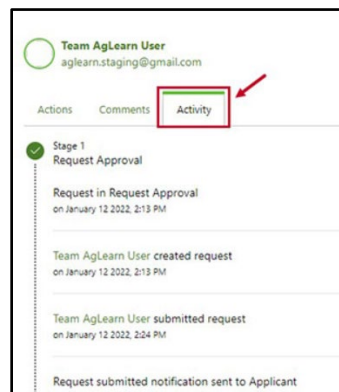

6.11 SF-182 Form Activity tab – Form History

1. To see the activity of your SF-182 form select the Activity tab. This is just an example of the activity tab. The list can be quite long depending on where the SF-182 form is in the process.

2. Depending on where your SF-182 form is in the SF-182 process the activity tab can tell you what has occurred. It is also time and date stamped for each entry. This will tell you when those actions happened.

3. Examples of Activity for Stage 1 – Submission and Approvals:

   a. [Name] created request – You have created an SF-182 request.

   b. [Name] submitted request – You have submitted an SF-182 request for approval.

   c. Request submitted notification sent to Applicant – You will get a notification your SF-182 form has been submitted for approval
   At start of level notification sent to Supervisor – An alert and email is sent to your supervisor that you have submitted an SF-182 for approval.

    d. [Supervisor Name] approved your request – Your Supervisor has approved your SF-182.

    e. At start of level notification sent to Approvers – Alerts and Emails have been sent to the Level 2 approvers.

    f. [Level 2 Approver Name] approved your request – Level 2 Approver has approved your SF-182.

    g. At start of level notification sent to Approvers – Alerts and Emails have been sent to the Level 3 approvers.

    h. [Level 3 Approver Name] approved your request – Level 3 Approver has approved your SF-182.

    i. At start of level notification sent to Approvers – Alerts and Emails have been sent to the Level 4 approvers.

    j. [Level 4 Approver Name] approved your request – Level 4 Approver has approved your SF-182.

    k. Request Approval all approvals granted – Your SF-182 has been approved by all required levels of approval.

    l. Request **Approval completed** – All approvals have been granted.

4. If you or an SF-182 Admin withdraw your request, you may see the following activities.

    a. **[Name] withdrew the request** – You or an SF-182 Admin has withdrawn your SF-182 request.

    b. **Request withdrawn notification sent to Applicant** – An alert and notification is sent to you advising this action has been taken in the system.

    c. **Request withdrawn notification sent to Supervisor** – An alert and notification is sent to your supervisor that your SF-182 Request has been withdrawn.

5. If your SF-182 request is rejected, you may see the following activities.

    a. **[Name] commented on your request** – This is comments from the approver who rejected your form. It should contain information on why the SF-182 was rejected and how to remediate that.

    b. **[Name] rejected your request** – This tells you which approver rejected your SF-182 request.

    c. **Level denied notification sent to Applicant** – An alert and notification is sent to you advising this action has been taken in the system.

6. Examples of Activity for Stage 2 – In Training:

   a. Stage 2 is Training, and this should mean that the training dates for your course have not yet passed. Stage 2 will reflect only two things that the training dates for your SF-182 course have not yet occurred and then that the dates for your SF-182 course have passed.

   b. **Request in Training** – The training dates for your course have not yet passed.

   c. **Training completed** – The training dates for your course have now passed.

7. Stage 3 – Verification

8. Examples of Activity for Stage 3 – Verification:

   a. **Request in Verification** – The course training dates have now passed and your form can be verified.

   b. **At start of stage notification sent to Applicant** – An alert and email are sent to you advising you that it's time for you to verify your attendance for your SF-182 form.

   c. **[Name] submitted request** – You have submitted your form for verification – that you did or did not attend this training course.

   d. **At start of level notification sent to Approvers** – An alert and email are sent to your supervisor asking them to verify your form and what you have submitted for verification.

   e. **[Supervisors Name] approved your request** – Your supervisor has approved your verification.

   f. **Verification all approvals granted** – All required approvals have been granted.

   g. **Verification completed** – Your form is completed and verified.

# Section 7 – Completing and Submitting an IDP

7.1   General IDP Information

1. If you are unfamiliar with individual development plans, please visit the USDA IDP Website (USDA IDP Directive). There you will find the related USDA Department Regulation 4040-410 and more information on IDPs. The Website also recommends the use of AgLearn to document and track the progress of your developmental goals. You can also ask your agency training staff about your agency's policies on IDPs.

2. Here is an important Note: Before you start filling out your IDP, it is critical to check that your profile has your correct supervisor listed. See section 2.3 of this document or visit Ask AgLearn Now (Ask AgLearn Now) for more information.

7.2   Locating and Edit your Current FY IDP

1. To begin, locate the Quick Links block on the Dashboard page. Then select the My IDP (Federal Employees Only) link.
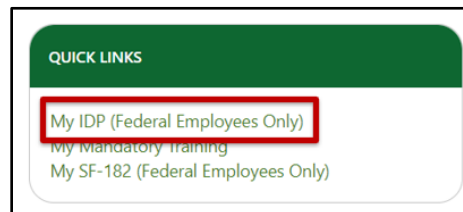

2. Your current IDP will be located on the Unapproved Plans list. It will be named MY IDP – FY followed by the year. Select the link to view your current IDP.
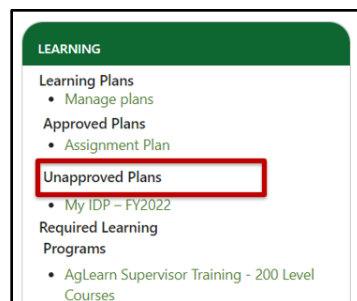
3. To Edit and add content to your IDP we begin on the OVERVIEW tab where you can add comments for your supervisor to see. The system will keep track of all comments.

4. Enter your text in the Add a comment box and then select Save comment.

5. At the top each page of the IDP, you will see a message: "**This plan has not yet been approved**" and the Send approval request button.

   a. Team AgLearn highly recommends that you add a comment on your Overview page when you submit your IDP for approval.

   b. This will provide a timestamped record of when you submitted your IDP for approval as there is no other report source in the system to provide this information.
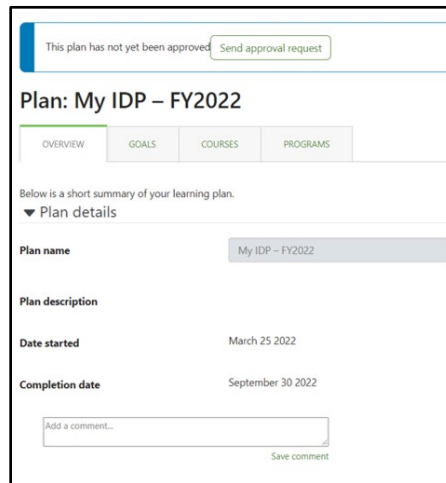
7.3   Adding IDP Goals

1. Select the GOALS tab to add and edit your Goals. To add Goals, select the Add new Goal button.
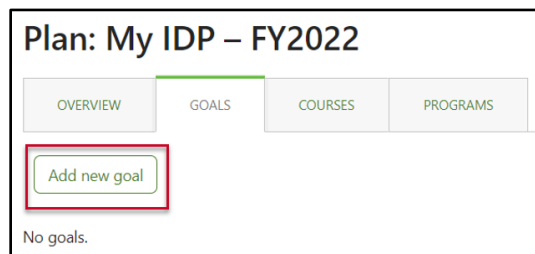
2. This is where you would add any developmental activities (e.g. rotations, mentor, detail, or shadow assignments) and/or an external course (not found in AgLearn). The required fields are Goal Title and Due date.

3. Employees are encouraged to enter a Goal description and change the priority of the goals based on conversations with their supervisor. Once you have entered all the pertinent information select Add goal at the bottom of the screen. Repeat this process to add additional goals.

4. As each goal is added a Goal created confirmation will appear on the Plan page.

5. Once your IDP has been approved by your supervisor, you can update the status of your IDP goals. You no longer need to rely on your supervisor to update IDP goals status. Before you update your IDP goal status, it is recommended to have a conversation with your supervisor about your IDP goals.

6. To update the status of a Goal, select the Goals tab and locate the Status column for the IDP goal you wish to update.
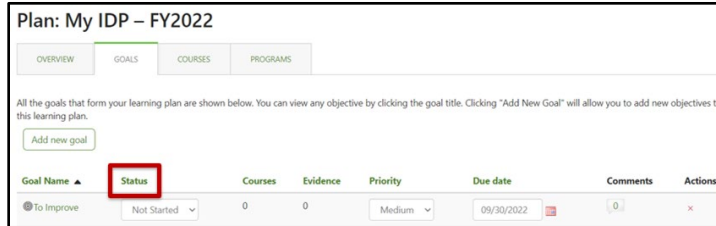

7.4 Adding Courses

1. To add Courses to your IDP, go to the COURSES tab and select the Add courses button.
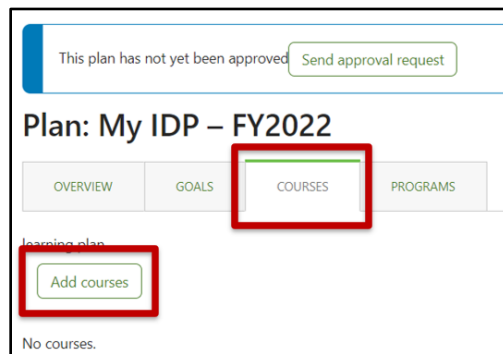
2. The Add courses search window will appear. You can either BROWSE courses available to you by selecting the plus sign next to the displayed categories or select the SEARCH tab and search for a certain course title.

3. **Note:** If there are more than 1,000 courses you will not be able to use the Browse function.
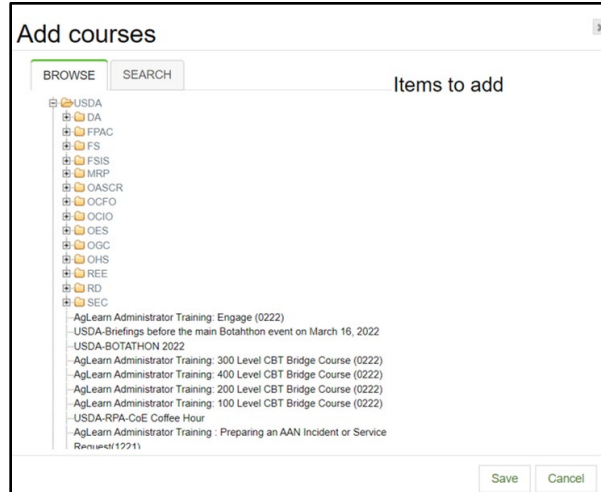
4. When using the SEARCH function to locate a specific title of a course, type the full or partial title into the search box. Once you have located the course, you would like to add to your IDP select the title of the course and it will appear in a list under "Items to add".

5. You can add multiple courses here if you choose. Select Save to add the course(s) to your IDP. The COURSES tab will display the list of all the courses you have added.
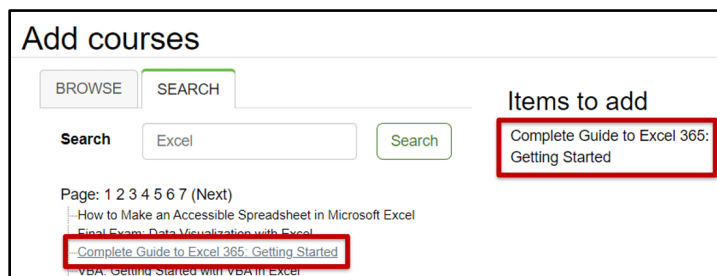
6. **Note:** Due dates for courses do not inherit the due date of the Goal. If it is a requirement that these due dates match, your supervisor can change the due date of the courses added to your IDP.
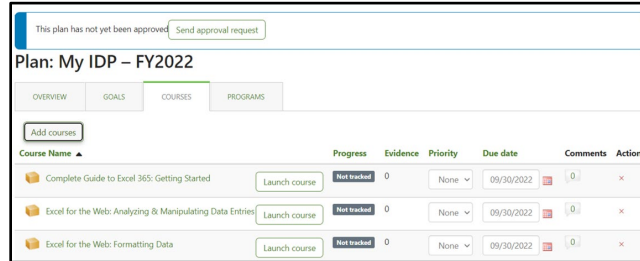

7.5   Adding Programs

1. You can also add Programs to your IDP. To do this, select the PROGRAMS tab.

2. Programs are recommended or required learning paths made up of one or more courses with "and/then/or" conditions for completion. To add Programs that are available to you select the Add programs button. The Add programs search window will appear.
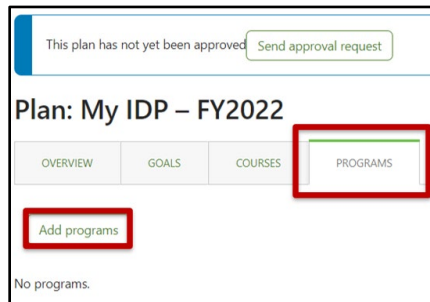
3. This function works the same as adding courses. You can BROWSE available programs or SEARCH for programs by title. Once you have located the programs, select the title of the program and it will be added under Items to add. You can add multiple programs here as well. After completing your program search, select Save to add the programs to your IDP.
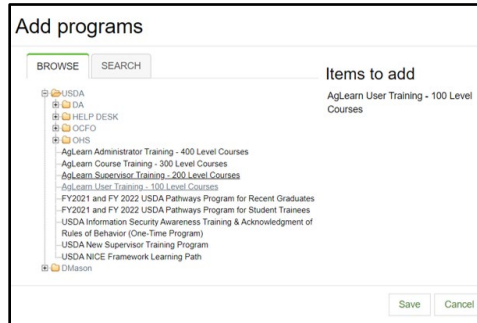

4. Once you have included your comments on the Overview page, added your Goals, Courses, and Programs to your IDP you must submit the IDP to your supervisor for approval. As we mentioned earlier, before you submit your IDP for approval please verify that your profile contains your correct supervisor.


5. The option to send an approval request to your supervisor is at the top of each screen of the IDP. Simply select the Send approval request button and your IDP will be sent to your supervisor for approval. Your supervisor will receive an email notifying them that your IDP is ready to be reviewed and approved.

6. If you need to suspend working on your IDP and come back to this task at a later time, you can locate the current IDP from the main Learning Plans screen. It will be located in the Unapproved Plans section. You can then select the Request approval link under Status.
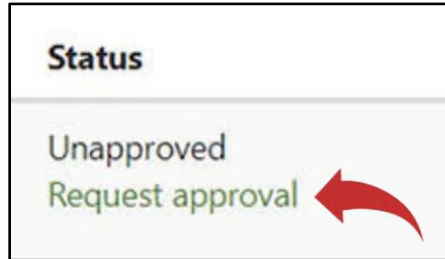

7. Once the request has been sent there will be a message that states, "This plan has not yet been approved (Approval Requested)".
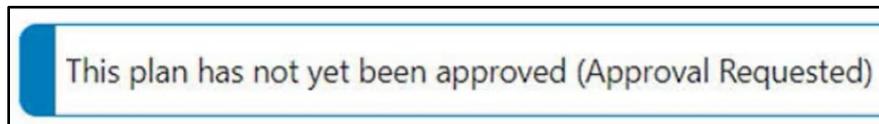
8. As noted earlier, Team AgLearn highly recommends that you add a comment on your Overview page when you submit your IDP for approval to provide a timestamped record of when it was submitted for approval.
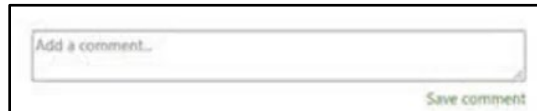

9. While you wait for your supervisor to act on the IDP, your main Learning Plans screen will reflect that approval was requested.
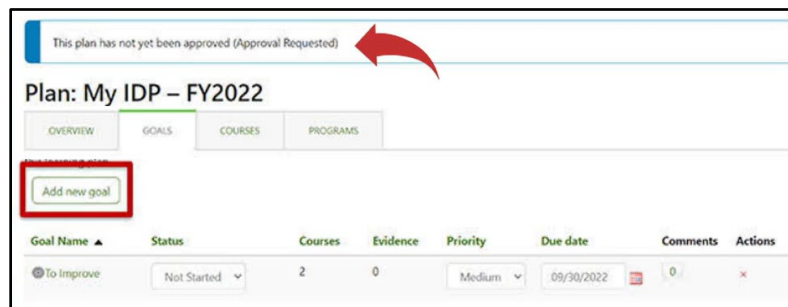
7.6 Making Changes or Updates After Approval

1. To make changes to your IDP after approval, select the tab you would like to change or add to. In this example we will show you how to add a new goal. You will follow the instructions discussed earlier in this course to add additional Goals, Courses, or Programs.
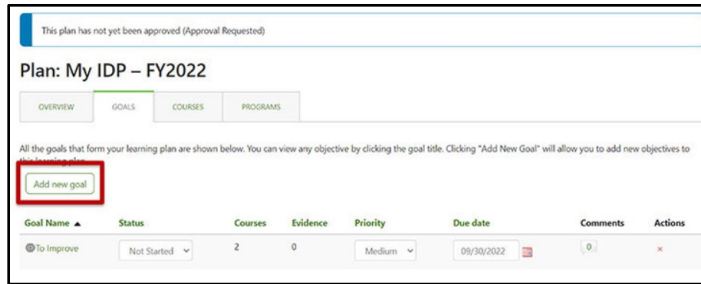

2. If you make changes to your approved IDP those changes will be in draft status until approved. The example below is for a new goal that was added to the IDP. The system will notify you at the top of the IDP screen that "This plan has a draft item." The item in draft will be identified and it will offer the option to **Send approval request**. You will need to select **Send approval request** to submit this change to your supervisor.
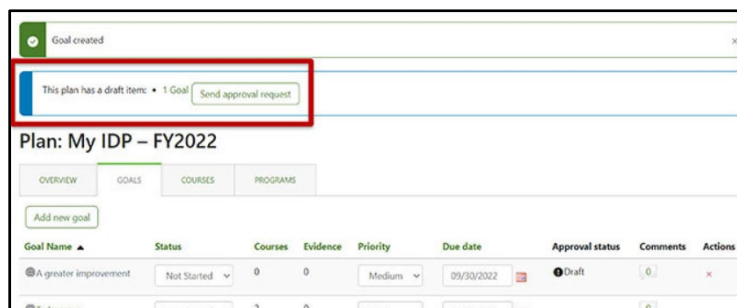
3. In the case where you have submitted a new goal and your Supervisor declines your changes, you will see this information on the page. You can see if comments were included. You can then make changes and submit those changes for approval to your supervisor. If the supervisor approves the change, the change will be active immediately.

4. Users cannot remove **Goals**, Courses and Programs once the IDP is approved. These may be removed **before** an IDP is approved by the supervisor (IDP is in draft). The supervisor may remove **Goals**, Courses and Programs at any time during the approval process. This includes before, during, and after approval.
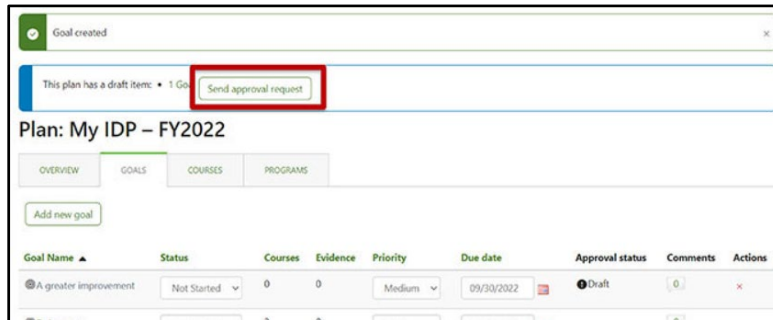
Section 8 – Engage Overview

## 8.1   What is AgLearn Engage?

1. Engage is a feature that provides an area within AgLearn for users to collaborate, discuss, and find curated resources.

2. There is a huge amount of content out there, both inside and outside your organization - but it's not helpful if employees don't know that it exists. There may be Podcasts, articles, YouTube videos and even forum threads - your employees are always finding useful and interesting content, but they may not always know how or where to share it.

3. To Access Engage, click the dropdown next to Learn in the main menu bar and select "Your Library".
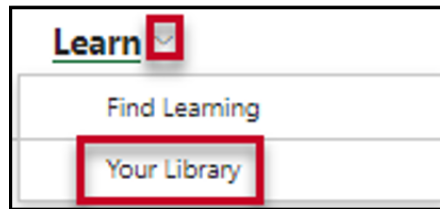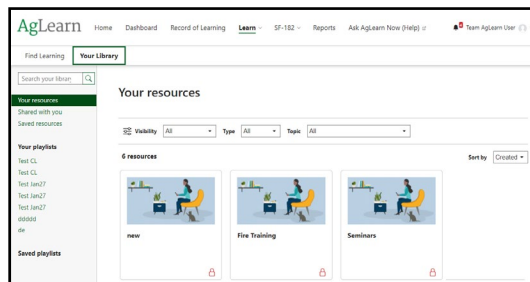

4. The Resources page will open.
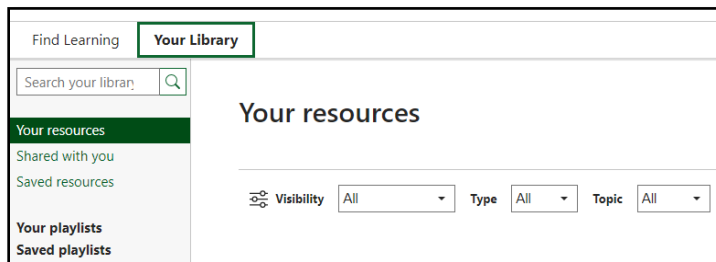
5. Here you can view resources, surveys, and playlists. Resources, surveys, and playlists are created by AgLearn Lead Admins and Team AgLearn.
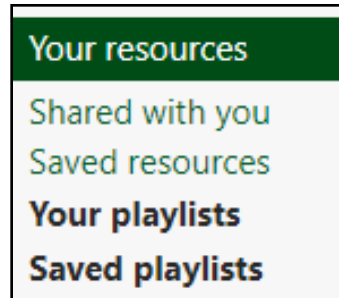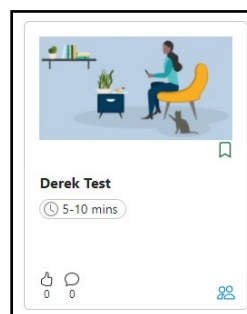

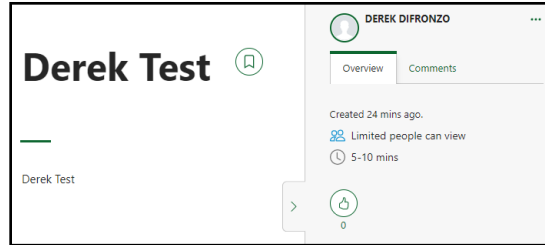6. If you have resources available to you, they will be displayed in Your Library.
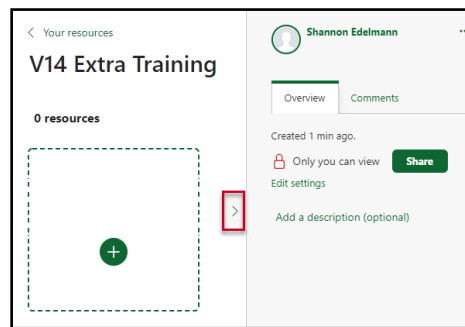

8.2   Resources

1. Select the Resource that you want to view. In this case, select "Derek Test".

2. The resource page opens. If there are Podcasts, articles, YouTube videos, and even forum threads - they can be accessed here.


3. In another example, you have the option to view an overview and comments or hide them by selecting the slide panel.

4. Users can view the comments for a resource or playlist by navigating to the Comments tab in the slide panel. Comments will include the commenter's name and profile picture, as well as a timestamp for each comment. These comments are not monitored, so please be thoughtful about what you or others write.
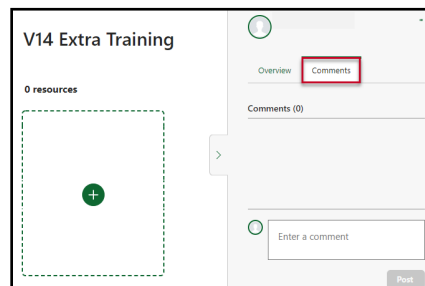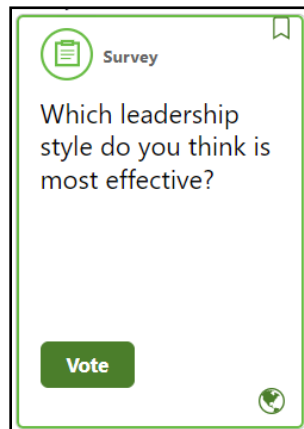
5. If others have shared resources with you, those will be available under Your Resources in "Shared with you". They work just like other resources.
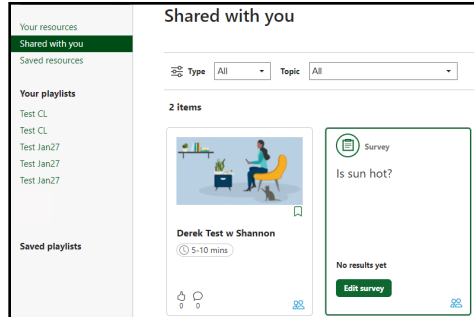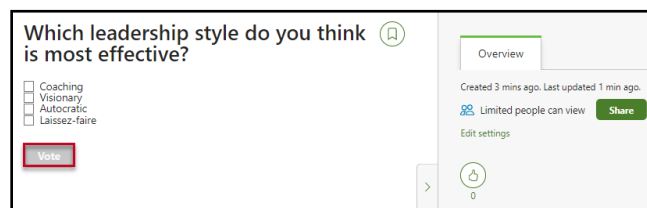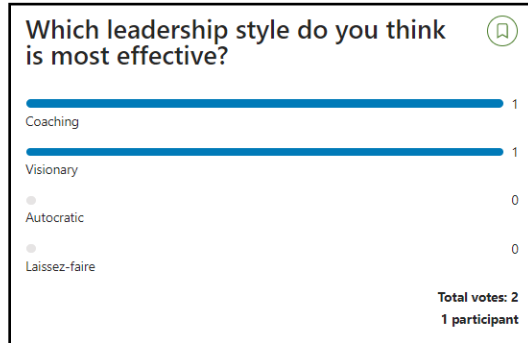

8.3 Surveys

1. Surveys consist of a single question with multiple answers and are used to collate users' opinions or preferences. Select the Vote button to take a survey.

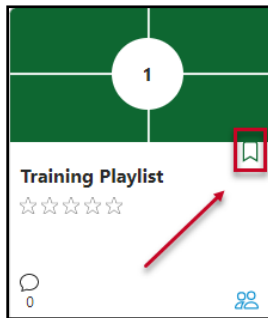2. Select an answer to the survey question and select Vote.

3. Once you have voted, the survey results page is displayed.
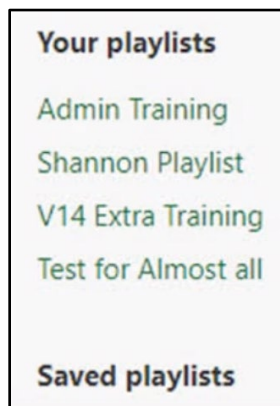

8.4 Playlists and Saved Playlists

1. Saved playlists and saved resources are items that you have bookmarked. Let's look at Your Resources.

2. If you have Playlists, those will be listed here. They work the same way as your other resources.
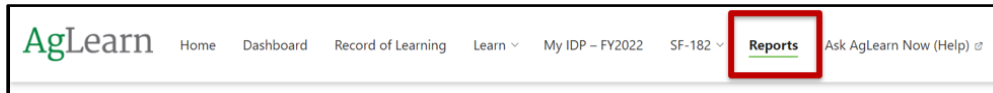
3. Users can save shared playlists by clicking the bookmark icon, which will add the playlist to the Saved playlists section of the left-hand panel. Clicking the bookmark icon again will remove the playlist from Saved playlists.

Section 9 – Reports

9.1 Reports

1. Select the Reports tab to see the reports available to you.

2. There are currently five reports available to end users:

    a. **End user – AgLearn Transcript**, this report provides a full official transcript of your courses regardless of completion status.

    b. **End user – Bookings**, which provides a list of your seminar bookings, past and pending, along with status.

    c. **End user – Record of Learning**, this report provides a list of all the Courses in your Record of Learning.

    d. **End User SF-182 Data**, that provides detailed data on a specified SF-182.

    e. **End User SF-182 Data Summary**, which provides summary data on your SF-182s including training data, costs, vendors, billing instructions, and approval status.
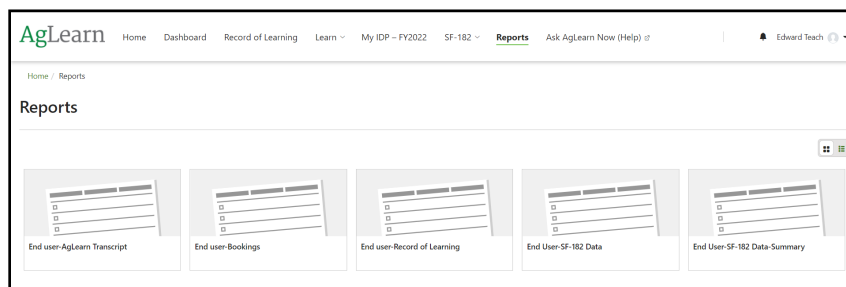
9.2 Viewing and Exporting reports

1. The details for Viewing and Exporting vary by report. Here are a few examples:

2. **End user – Bookings**, the default setting is to return all seminar bookings.

    a. You can select the Show more option to expand the screen to see additional search criteria. Since initially all seminar bookings were

returned, entering search criteria will reduce the number of results returned.

b. The **Show more** link displays all available search criteria that can be used to search for a specific course or seminar:

  i. Course Name

  ii. Seminar Name

  iii. Session Start Date

  iv. Status


3. **End user – Record of Learning**, the default setting is to return your entire Record of Learning.

  a. When you select the Show more link to expand the available search criteria you can use the following to search for a specific course:

  i. Course Name

ii. Course Completion Date
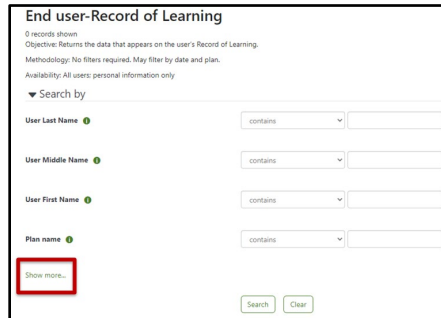
b. You can also include filter qualifiers in your search criteria, most fields have a drop-down that allows you to choose between:

i. Contains

ii. Doesn't contain

iii. Is equal to

iv. Starts with

v. Ends with

vi. Is empty

vii. Is not empty (NOT NULL)
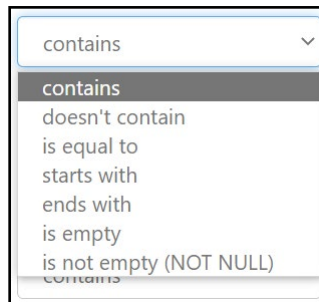
4. The default name of Contains is generally a good option for most searches. Using the **End user – Bookings**, as an example, you would type in the course name.

     a. There are also drop-down choices when dealing with Status options:

         i. Is any value

        ii. Is equal to

      iii. Isn't equal to
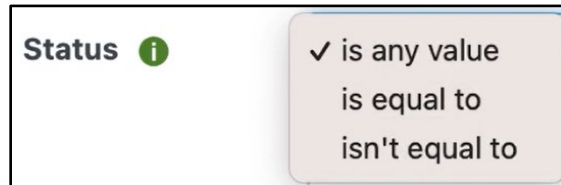
5. Using the **End user – Bookings** report as an example, after selecting any of the choices other than "Is any value," the option to select a specific status becomes active. You can then use the drop-down to select any of the options listed to find what you are looking for, such as **Fully attended** or **Booked**. Select Search to filter the results.
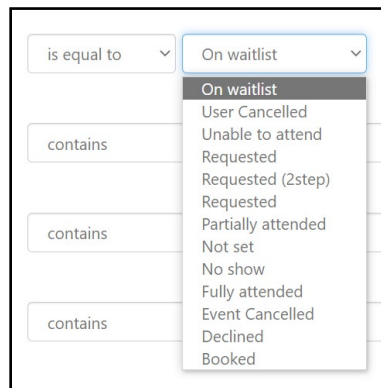

6. You can customize your search results further using the Show/hide columns button to only show the data you are interested in.

7. For example, in the **End user – Bookings** report, you can choose the data columns that are relevant to you. To hide columns, uncheck the boxes next to each column you wish to hide and the report will remove it from the data displayed.
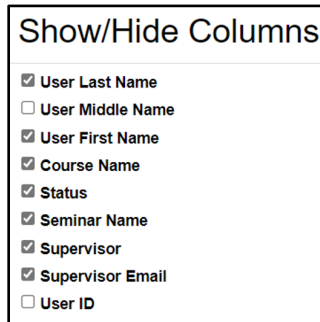
8. You also have the option to sort the results returned based on many of the column headers. To sort by Status, select the link Status at the top of the column.
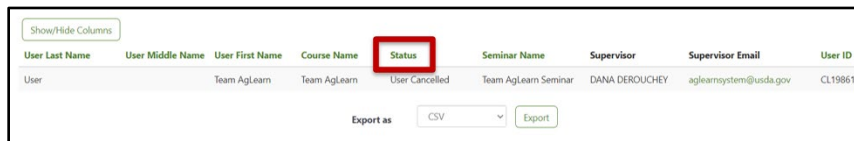

   a. Once you have the results that you are looking for, you can export the report data in other formats for various uses. The options are:

      i. CSV

      ii. Excel

      iii. PDF landscape

      iv. or PDF portrait
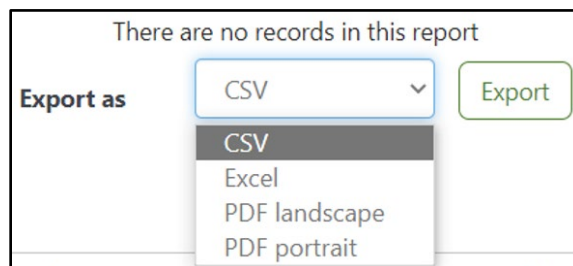
9. Each of the exportable formats has its own characteristics.

a. CSV or Comma Separated Values saves data in what looks like an Excel spreadsheet. Some applications can import CSV files but not Excel worksheets (AgLearn, for example). CSV files don't have all the capabilities of Excel worksheets, but they can be imported as worksheets in Excel.
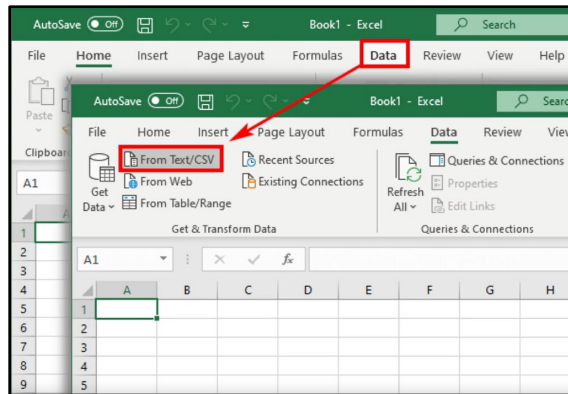
b. Excel worksheets offer all the capabilities of Excel but may not be universally importable by other applications or databases.

c. The PDF landscape option opens a PDF file in landscape format.

d. The PDF portrait option opens a PDF file in portrait format.

10. Use CSV or Excel files if you need to reformat or otherwise massage the data. If you just want to send your data as a report, PDF files are already formatted for you.
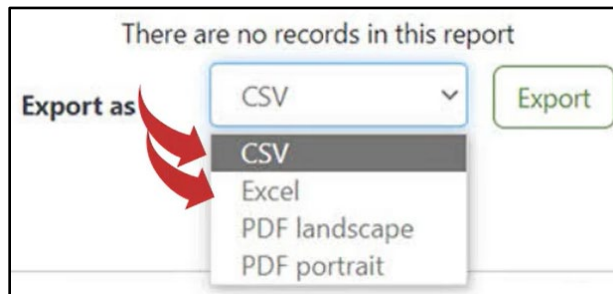
11. **Note:** Exported data will contain all data fields returned by the report, even if you chose to hide them on your screen.