Using the Site

This document describes the features and functionality of the site. The site is very customizable, so your company may have tailored it to suit their requirements. Depending on how your site is customized, the names of fields and buttons may not match those described in this document. In addition, some of the features described in this document may not be offered on the site.

Select the links below to learn about the features offered on the site.

Home Page

When you first log in to the site, the Home page appears, unless the site was customized to direct you to another page (such as the My Queue page) after logging in. In addition, some sites may not offer a Home page.

Links for navigating to other pages on the site appear on the left (see “Navigation,” below). Depending on how the site was customized, the Home page may also offer a slide show, a welcome message, a video, and links to available resources. On a tablet, use the landscape orientation to see the video and resources (if available).

To return to the Home page:

1. Select the **Home** link on the left.

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Navigation

The left side of the page lists links for navigating around the site.

To navigate to another page on the site:

1. Select the name of the page you want to view.

Depending on how the site is customized, the My status area may appear below the navigation links on the left. If it does, you can use it to navigate to the My Queue page.

To get to the My Queue page from the My status area (if available):

1. Select **>> Go to My Queue**.

Depending on how the site is customized, a sidebar on the right may offer links to a video, additional resources, or both.

To view the video (if available):

1. Select the video thumbnail.

> On most browsers, you can maximize the video so that it takes up your entire screen. However, this feature is not supported by Internet Explorer 8.
>
> On a tablet, use the landscape orientation to see the video thumbnail.

To access resources (if available):

1. Select the link for the resource.
   OR
   Select **>> More resources** to open the Resource Center page.

> On a tablet, use the landscape orientation to see the resources.

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My Queue Page

The My Queue page lists your assignments, such as education modules, certification questionnaires, and surveys. The assignments are grouped by type (Mandatory, Select any, Optional, and so on). Within each group, the assignments appear in the order in which they're due, with the most urgent at the top.

If your assignments include a Select any group, you have a choice of modules to take to complete the assignment. For example, the Select any group may contain three modules, but you can complete it by taking any two of them. A message appears for each Select any assignment to help you track your progress in completing it (for example, “Complete 2 of 3 items from the list below: 1 REMAINING”).

If a module is part of a module chain (a sequence that you must take in a particular order), a chain icon ( ) appears on the module listing along with a counter indicating its position in the chain (such as "1/3").

To get to the My Queue page:

1. Select the **My Queue** link on the left.
   OR
   Select **>> Go to My Queue** in the My status area.

   Depending on how your site is customized, the My status area may not appear below the navigation links on the left.

   The My Queue page offers two formats, a list view and an image view (see below).

To switch between the two formats:

1. Click .

List View

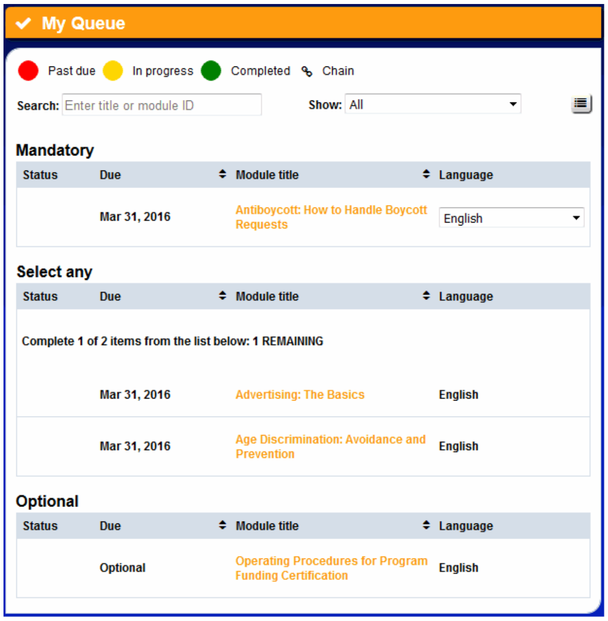
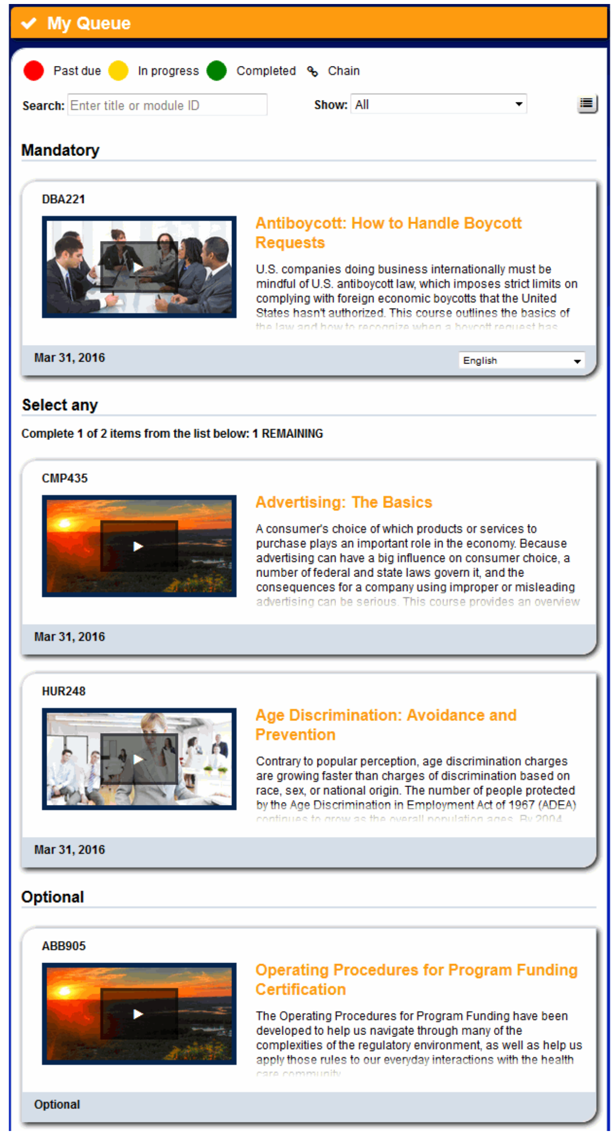


Image View



To search for an item in your queue:

1. Enter part of the title or module ID in the **Search** text box.

   As you type in the Search text box, your queue dynamically updates to show only the items that match your search criteria.

The search function compares your search string only to the content currently displayed on the page. For example, if you enter part of a module title in Spanish but the titles displayed in your queue are all in English, the search function will compare your Spanish search string to the English titles and not find the module.

To filter your queue:

1. Select one of the following filter criteria from the **Show** drop-down menu.

All	Show all assignments (do not filter).
Not started	Only show assignments that you haven't yet started.
In progress	Only show assignments that you've started but haven't completed.
Past due	Only show incomplete assignments that are past their due date.
Completed	Only show assignments that you've completed. This option is only available if your site is configured to show completed assignments on the My Queue page.
Optional	Only show assignments that are optional for you to complete.
No due date	Only show required assignments that have no due date.
Chain	Only show modules that are part of a module chain.
Select any	Only show modules that are part of a Select any group.

To sort your queue (list view only):

1. Select the **Module title** column header to sort by title.
   OR
   Select the **Language** column header to sort by language (internationalized sites only).
   OR
   Select the **Due** column header to sort by due date (the default sorting option).

2. To reverse the sort order, select the column header again.

To open an item from your queue:

1. (Optional) If an item listing includes a drop-down menu of languages, select your preferred language.

2. From the My Queue page list view, select the title.
   OR
   From the My Queue page image view, select the title or the play icon on the thumbnail image.

   A page appears from which you can launch the item. For example, if you chose a module, the Module Overview page appears (see "Module Overview Page," below).

Completed queue items appear on the Completion History page (see "Completion History Page," below). Depending on how your site is customized, they may or may not also appear on the My Queue page.

Completed modules in a Select any group remain on the My Queue page until the entire assignment is complete. Then, depending on your site's configuration, the entire Select any group may disappear from your My Queue page.

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Module Overview Page

The Module Overview page contains information about the module and a button to launch it.

Depending on your site configuration, module rating and review features may be available.

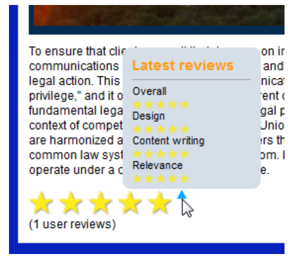
To get to the Module Overview page:

1. From the My Queue page list view, select the module title.
   OR
   From the My Queue page image view, select the module title or the play icon on the module's thumbnail image.

To view detailed ratings for the module (if available):

1. Select the arrow (▼) next to the overall module rating.

   Average ratings for all the ratings categories appear.



To read reviews of the module:

1. Select **Reviews**.

   The Module Ratings and Reviews page opens and lists the reviews available for the module (see "Module Ratings and Reviews Page" below).

To return to the Module Overview page:

1. Select **Overview**.

To launch a module:

1. Select **Next** to start the module for the first time.
   OR
   Select **Resume** continuing taking a module you've already started.

Immediately after completing a module, you may be able to rate and review it. Alternatively, you can return to the Module Overview page later to rate and review it.

To rate and review a module:

1. Immediately after completing a module, select **Rate and review this module**.
   OR
   Select **Reviews** near the top of the Module Overview page.
   OR
   Select the module on the Completion History page. Then, select **Rate and review this module**.
2. Select the number of stars you want to give this module in each rating category.
3. (Optional) Enter your review in the text box.
4. Select **Publish** to publish your review.

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Social Features within a Module

From within a module, you may be able to post to a social network or send an e-mail. You can even highlight text from the module, and it will appear automatically within your e-mail message or post.

Depending on how the site is customized, the social features may not be available. Also, some modules do not offer these features.

To share from within a module:

1. (Optional) Highlight the text you want to share.

   Not all text within a module can be highlighted.

2. Select **Share** at the bottom of the module window.

   A pop-up menu of sharing options appears.

3. Select the sharing option you want to use.

   Depending on how the site is customized, you may be able to share via e-mail, Twitter, or Salesforce Chatter.

4. Enter any information necessary to use your selected sharing option.

   For example, if you are sharing via e-mail, you need to provide e-mail addresses of your intended recipients. If you are sharing via Twitter or Chatter, you may need to log in to your account before sharing. If you are using Chatter, you may also need to select a Chatter group where you want your message to appear.

5. (Optional) Add any comments you want to include in your e-mail message or post.

   Any text you highlighted from the module is automatically included.

6. Send your e-mail, or post your message.

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Module Ratings and Reviews Page

The Module Ratings and Reviews page lists users' ratings and reviews of the module.

Depending on how your site is customized, this feature may not be available.

To get to the Module Ratings and Reviews page:

1. Select **Reviews** near the top of the Module Overview page.
   OR
   Select the module on the Completion History page. Then, select **Rate and review this module**.

   The Module Ratings and Reviews page opens and lists the reviews available for the module. If you have completed the module, you can enter your own rating and review.

   On iPads, you may be able swipe to see more ratings and reviews for a module even though scrollbars do not appear.

To rate and review the module:

1. Select the number of stars you want to give this module in each rating category.
2. (Optional) Enter your review in the text box.
3. Select **Publish** to publish your review.

To edit a rating and/or review that you've previously published:

1. Select **Edit**.
2. Make any changes.
3. Select **Publish**.

To delete a rating and review that you've previously published:

1. Select **Delete**.
2. Select **Continue** to confirm that you want to delete the rating and review.

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Module Catalog Page

The module catalog lists the modules that are available on your site. From this page, you can read descriptions of the available modules and open the Module Overview page for any listed module. In this way, you can read reviews (if available) or take modules that interest you even if they haven't been specifically assigned to you.

To get to the Module Catalog page:

1. Select the **Catalog** link on the left.

To sort the module list:

1. Select a column heading to sort by that column.
2. To reverse the sort order, select the column header again.

To view a module's description:

1. Select the small arrow (▶) next to the module title to expand the listing so that it includes the description.

To hide a module's description:

1. Select the small arrow (▼) next to the module title to collapse the listing so that it does not include the description.

To open the Module Overview page for a module:

1. Select the module title.
   OR
   Select the module description if it is visible.

To view the information for a module in another language:

1. Select the language you want from the drop-down menu in the Language column.

   This drop-down menu only appears for modules that are available in more than one language.

To page through the list of modules:

1. Select **Previous** or the left arrow (◀) to see the previous page.
   OR

   Select **Next** or the right arrow (▶) to see the next page.
   OR
   Select a page number to go directly to that page.

To select the number of modules to list on each page:

1. Select a number from the Show drop-down list box in the upper left.

To search for a particular module:

1. Enter a keyword or module ID in the Search text box.

   As you type in the Search text box, the module list dynamically updates to show only the modules that match your search criteria.

The search function compares your search string only to the content currently displayed on the page. For example, if you enter part a module title in Spanish but the titles displayed in your queue are all in English, the search function will compare your Spanish search string to the English titles and not find the module.

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Resource Center Page

The Resource Center page lists all the resources available on the site. Not all sites offer the Resource Center page.

To get to the Resource Center page:

1. Select the **Resources** link on the left.
   OR
   Select **>> More resources** in the Resource center sidebar on the right.

   Depending on how your site is customized, the Resource center sidebar may not appear. In addition, if the site offers a Resource center sidebar, it appears on tablets in the landscape orientation only.

To access a resource:

1. Select the link for the resource.

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Completion History Page

The Completion History page lists of all your completed items (such as education modules and certifications), plus information about each one. If a listed module was assigned to you by a campaign that is still in progress, you can retake the module from this page.

To get to the Completion History page:

1. Select the **History** link on the left.

To view more information about a completed item:

1. Select the listing for the item.
   OR
   Select the small arrow (▶) next to the title to expand the listing so that it includes the description.

   The listing expands and displays more information about the item.

To hide information about the item:

1. Select the grey part of the listing to collapse it.
   OR
   Select the small arrow (▼) next to the title to collapse the listing.

To retake a module:

1. Expand the module listing as described above.
2. Select **Start now** in the expanded module description.

To review and rate a module:

1. Select **Rate and review this module.**

   The Module Ratings and Reviews page appears.

   Depending on how your site is customized, these features may not be available.

   ---
2. Select the number of stars you want to give this module in each of the rating categories.
3. Enter your review in the text box.
4. Select **Publish** to publish your review.

To print a list of completed items:

1. Select **Print this page**.
2. Select **Print this page** on the print preview.
   OR
   If you are using an Android tablet, open the menu and select **Print…**.
3. If you are using an iPad, select **Print** on the Printer Options.
   OR
   If you are using an Android tablet, use the Android printing feature to print the page.

To filter the list by a range of completion dates:

1. Select **Filter by date**.
   OR
   Select the small arrow (▶) next to **Filter by date**.
2. Select start and end dates.
3. Select **Apply**.

   The list of items that you completed during the specified date range appears.

To remove the date filter:

1. Select **Clear dates**.

To sort your completion list:

1. Select a column heading to sort by that column.
2. To reverse the sort order, select the column header again.

To print a Certificate of Completion for a module:

1. Expand the listing for one of your completed modules as described above.
2. Select **Module completion certificate**.
3. Use your browser or device print feature to print the certificate.

   Depending on how your site is customized, the certificate may not be available.

To print a certification:

1. Expand the listing for a certification or a module that includes a certification as described above.
2. Select **Certification**.
3. Use your browser or device print feature to print the certification.

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Dashboard Page

On the Dashboard page, you can view Education program performance data in near real-time and track progress using module completion data. Not all sites offer the Dashboard page. If your site does offer the Dashboard page, the information available to you depends on how your site is configured and on your role in the organization.

To get to the Dashboard page:

1. Select the **Dashboard** link on the left.

When you first open the Dashboard, you have to select a category by which to group and display the report data.

To group the report data:

1. Choose a category from the **Group by** drop-down menu.

   Depending on your site's configuration, one or more of the following reports appears:

   - Course Completion Status: Shows the module completion status for selected campaigns.
   - Incomplete and Past Due Courses: Shows only modules that are incomplete and past due for selected campaigns.
   - User Completion Status: Summarizes the total numbers of complete and incomplete modules for selected campaigns.
   - Course Status Details: Shows detailed status information about all the modules in selected campaigns.

   The data that appears on each report depends on your role in the organization. For example, you may see data for the people who report to you and are in your organization. If you're an individual contributor, you'll see the data for your own individual completion status.

   When viewing the Dashboard reports, keep the following points in mind:

   - If a user completes a course more than once, only the first successful completion is shown. If there are multiple courses that are in progress, only the most recent attempt is counted.
   - Equivalent modules (modules with the same base catalog ID) are counted as a single module. So, for example, if a course is available in three languages and has not been started yet, the course is counted only once as "Not Started."

To change the magnification:

1. Adjust the **Zoom** slider to zoom in or out.

Each chart on the dashboard offers alternative layouts in addition to a default layout.

To change a chart's layout:

1. Select a radio button above the chart to see a different format.

Depending on your site's configuration, you may be able to "drill-down" to see more detailed information for one or more of the Dashboard reports.

To see drill-down details:

1. Click an area on a chart to see more information about it.

   If drill-down details are available, a table of the user and/or completion data included in the chart appears.

Depending on how much information is available, the drill-down details may span several pages.

To page through the details:

1. Click **Next** to view the next page.

   OR

   Click **Previous** to view the previous page.

   OR

   Click a page number to go directly to that page.

To specify the number of rows to include on each page of drill-down details:

1. Select a number of rows from the **Show Entries** drop-down menu.

The drill-down details may include more data columns than can fit in the space provided.

To view hidden data columns:

1. Use the scroll bar below the drill-down details to scroll horizontally.

To change the sorting of the drill-down details:

1. Click a column heading to re-sort the table using that column.

   Click the column heading again to switch between ascending and descending order.

To search for specific data in the drill-down details:

1. Select the data column that you want to search from the drop-down menu.
2. Enter the information that you want to find in the text box.

   The data rows that contain matching data in the selected column appear.

To clear your search criteria and display all the available details:

1. Click .

To hide the drill-down details:

1. Click the minus sign () below the lower-right corner of the chart.

To show a hidden set drill-down details:

1. Click the plus sign () below the lower-right corner of the chart.

You can export the report data to a comma-separated value (CSV) file or a PDF document.

To export a Dashboard report:

1. Select CSV from the drop-down menu above a chart or drill-down details table to export the data as a CSV file.

   OR

   Select PDF to export the chart or drill-down details table as it appears on the Dashboard page to a PDF document.

The Dashboard offers a View by Proxy feature, which allows users with the appropriate permissions to authorize someone as their proxy to view their Dashboard reports. If you are authorized to view someone else's Dashboard reports as their proxy, that person's name appears in the **View Dashboard as** drop-down menu.

To view someone else's Dashboard reports as their proxy:

1. Select the name of the person whose Dashboard reports you want to see from the **View Dashboard as** drop-down menu.
2. Choose a category from the **Group by** drop-down menu.

   The Dashboard reports for the selected person appear. The data that appears on each report depends on that person's role in the organization. For example, you may see data for the people who report to the selected person and are in that person's organization. If the selected person is an individual contributor, you'll see the data for that person's individual completion status.

If you have permission to authorize someone as your proxy, the **Assign Proxy** button appears on your Dashboard page.

To manage your Dashboard reporting proxies:

1. Click **Assign Proxy**.

   The Assign proxy dialog box opens. From here, you can authorize someone as your Dashboard proxy, view the list of people already authorized as your Dashboard proxies (if any), and revoke authorization for an existing proxy.

To authorize someone to view your Dashboard reports as your proxy:

1. Enter the Catalyst user name of the person who you want to authorize as your Dashboard proxy.

   The proxy's Catalyst user name is the name that your proxy uses to log in to the Catalyst site.

2. Click **Add proxy**.

To change the sorting of the list of your existing Dashboard proxies:

1. Click a column heading to re-sort the list using that column.

   Click the column heading again to switch between ascending and descending order.

To revoke authorization for an existing proxy:

1. Click next to that person's Catalyst user name. Then, click **OK**.

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My Profile Page

On the My Profile page, you can view and edit your profile, and change your password.

To get to the My Profile page:

1. Select the **Profile** link on the left.

To edit your profile:

1. Select **Edit**.
2. Make any changes to the editable information in your profile, and select **Save**.

   Depending on how the site is customized, some information may not be editable.

To return to viewing your profile:

1. Select **View**.

To change your password:

1. Select **Change password**.
2. Enter your current password in the Current password text box.
3. Enter your new password in the New password text box.
4. Re-enter your new password in the Confirm password text box, and select **Save**.

Your site may have certain rules for passwords (for example, a minimum of 8 characters, 1 upper-case). If so, your new password needs to conform to these rules.

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Using the Site on a Tablet

Your site supports the following tablets in addition to desktop and notebook computers:

- Apple iPad Air, iPad 4, iPad 3, iPad 2
- Google Nexus 10
- Microsoft Surface Pro 3
- Samsung GT-N8000 Galaxy Note (10 inch and 12 inch)

In most cases, scrollbars indicate when you can swipe to view more content. In some cases, however, the scrollbars may not appear until you begin swiping. If you are using an iPad, scrollbars may not appear in some areas (such as on panes within windows) where you can swipe to view more content.

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