

The logo for LearnConnect is centered within a large, stylized white cloud with a soft drop shadow. The word "Learn" is in a bold, black, sans-serif font, and "Connect" is in a bold, orange, cursive script font.

**Learn** *Connect*

# **HOW TO CREATE A TRACKABLE DOCUMENT**

Hello and welcome to LearnConnect Help. I'm going to explain how to create a trackable document.

Trackable documents allow you to upload documents, or provide users with instructions on how to access further information via a web-link. For example, you might be required to distribute up-dated company policies, or ask users to attach a completed work book or license as evidence.

This learning type allows you to add the attachment and then report if the item has been viewed, completed or assessed.

Let's begin by selecting the "Create Learning" tab under "Manage Learning" in the top menu.



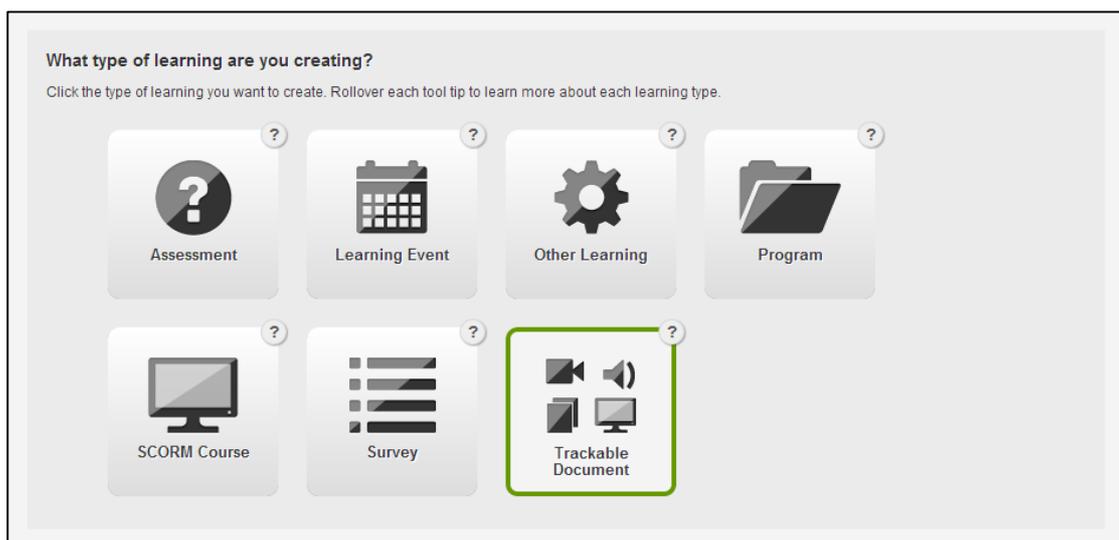
You'll notice that "Create Learning" is a wizard split into four steps:

1. "Learning Type", where you define what type of learning you're adding;
2. "Description", where you describe your learning;
3. "Details", where you add or define the learning; and
4. "Review/Publish", where you get to see your learning in action before it's added to your library.



Let's start with step 1 – "What type of learning are you creating?"

This wizard allows you to create different types of learning within the LMS. For this demonstration, I'll show you how to create a trackable document.



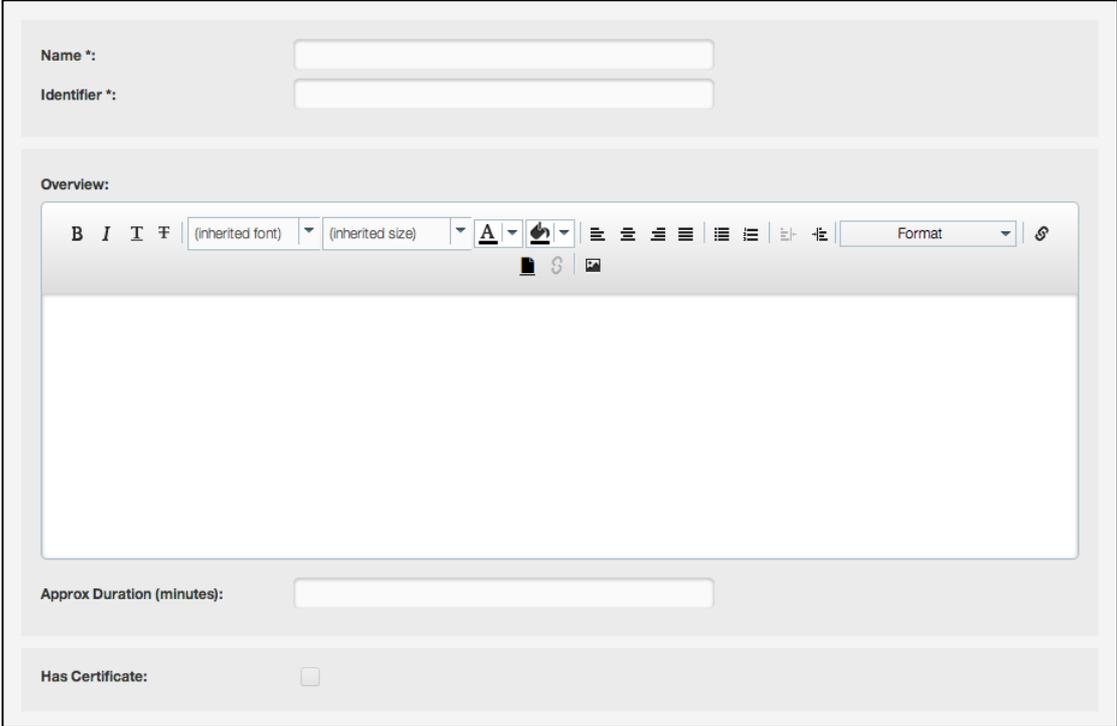
Select the appropriate "Learning Type", in this case it will be a trackable document, then select 'Next'. This will take you to step 2 – "Tell us about your trackable document".

Step 2 asks you to describe the learning that you want to create. Here you'll provide the information that will be shown in the library. It informs users what they can expect to achieve once they've completed their learning.

Begin by adding the name or title of the learning, which should be short and succinct.

Next, you'll need to enter an identifier. An identifier is a term that you can use to help you locate your learning behind the scenes. For example, an identifier might be the learning title with a date, a year or perhaps even an accreditation code or any other unique terms that can help you to track the learning.

You can use the Overview section to provide a detailed description of the learning. It is recommended to use descriptions which include an overview of the learning, what the expected learning outcomes should be and a list of the learning objectives.



The screenshot shows a form with the following fields and sections:

- Name \*:** A text input field.
- Identifier \*:** A text input field.
- Overview:** A rich text editor with a toolbar containing options for Bold (B), Italic (I), Text Color (T), Font Color (F), font face (inherited font), font size (inherited size), text color, background color, bulleted list, numbered list, decrease indent, increase indent, link, unlink, and a Format dropdown menu.
- Approx Duration (minutes):** A text input field.
- Has Certificate:** A checkbox.

Once you've typed this information into the editor field provided, you can then use the text editor options to adjust the formatting. When you're happy with your description, add the expected duration of the learning in the field provided.

There are also a number of other descriptors that you can add using the "Description" wizard. For example, you can upload completion certificates by checking the "Has Certificate" box. Users will then receive a certificate on the successful completion of the learning.

Another feature of this wizard is the ability to add Tags. Tags are words or phrases that describe the learning and are used to categorise the learning in the LMS. Tags can describe topics like “Compliance”, or the even the type of learning itself such as “Video”, “Audio”, or “Policy”. The Tags field allows you to select existing tags, or create your own.

▼ **What tags would describe this Learning Event?**  
Tags are broad terms that describe the topic of the Learning item. Think of them as topics or category titles.

Description Tags:

New Tags:

You might also want to add a primary contact for the learning by using the dropdown menu. Simply start by typing their contact details into the field for an auto complete or, alternatively, you can scroll down to select someone from the list provided.

▼ **Who is the Manager for this Learning Event**  
Primary Contact Summary

Manager:

The “Advanced Details” section also allow you to add archive dates, version names and lots of other information.

▼ **Advanced Details**  
Advanced Details Summary

Archive Date:

Version Info:

Provider:

Internal Cost:

Points:

And that’s step 2. Let’s move on to step 3 – “What are your trackable document details?”

Step 3 is where you add your learning – in this case it's a trackable document.

Trackable documents are one of the easiest types of learning to create. Simply select whether or not you want your user to verify that they've understood the document, and then add a URL, or upload a document by using the document selector.

There are the following restrictions for each type, and the maximum file size is 450MB:

- Documents (Any file type or URL, except .exe and .zip)
- Video (.mp4 encoded with H.264 codec)
- Audio (.mp3)

Once you've uploaded the specific file or added your URL, select "Next" to continue.

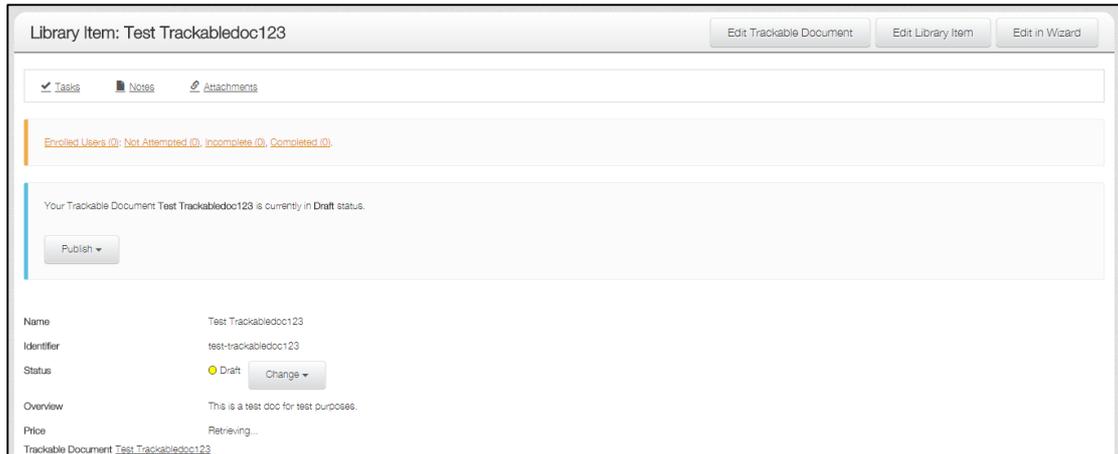
It's now time for the fourth and final step in the "Create Learning – Trackable Document" process – "Success".

By completing the previous steps, you'll now have a draft version of your learning.

You have two options; to save the trackable document as a draft or to publish the trackable document. Draft learning is the state where a learning item exists in the library but can't be viewed or

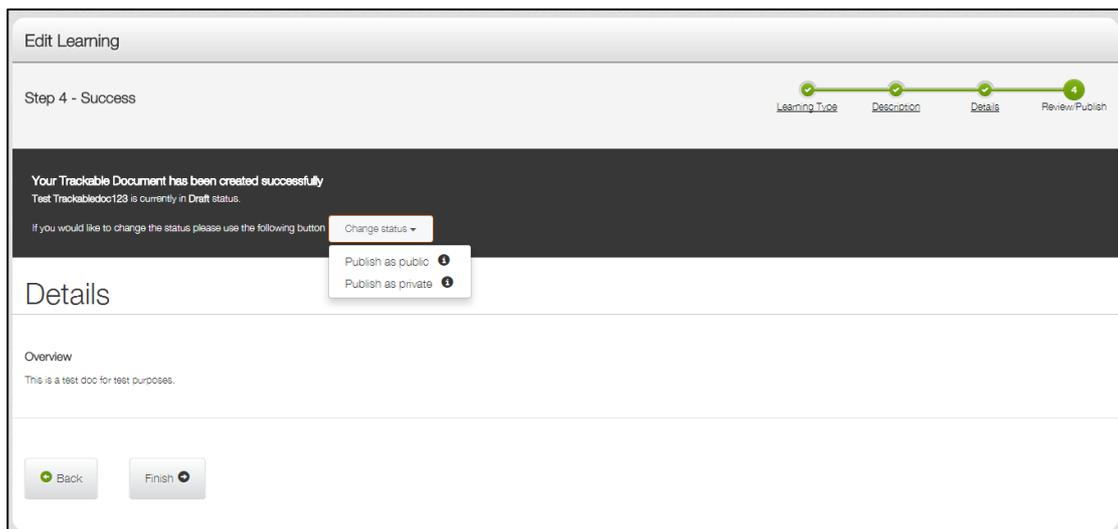
assigned to any users. To make this learning available within the system, it will first need to be published.

If you would like to keep your trackable document in draft status, select the “Finish” button. Your trackable document is saved as a draft. When you are ready to publish your draft trackable document, select the “Publish” button.



If you are ready to publish your trackable document, look over all the details and make sure everything is appearing correctly. If not, you can go back and edit the details by selecting the “Back” button, or choosing the related step in the green progress bar at the top.

When you’re happy with everything you see, it’s time to publish your trackable document. To do this, select ‘Change status’ drop down arrow, and then select whether you want your trackable document to be published privately, or publically.



Private publishing allows administrators and managers to view your trackable document in the library. Users will not have this visibility.

Public publishing means that your trackable document can be seen in your library by anyone. This also allows your users to request the trackable document, if your LMS has this functionality active.



And that's how to create a trackable document!