

Welcome to Learning Portal 2.0

Endress+Hauser SC-USA online learning platform
Rollout documentation March 2014



Table of Contents

- [Online Learning](#)
- [Logging in to LP 2.0](#)
- [My Assigned Learning](#)
- [Navigating the Course Catalog](#)
- [My Self-Assigned Learning](#)
- [My Learning Records](#)
- [My Certificates](#)
- [Accessing ISEmetrix exams](#)
- [Featured Courses](#)
- [Searching the Knowledge Bank](#)
- [Registering for Classroom Training](#)
- [Using an iPad](#)
- [Still have questions?](#)
- [Other ways to learn](#)
- [Advanced Searching](#)
- [Additional topics](#)
 - [My Shortcuts](#)
 - [Notes](#)
 - [My Profile](#)
- For Supervisors Only
 - Seeing your employees' learning records
 - Assigning learning activities to employees

By way of reminder ... some advantages of online learning

- We reach more people (faster) than with a series of classroom events
- Guarantees consistent delivery of key messages
- Enables training on “small” and brand-new topics for which we cannot justify scheduling a classroom event
- Mitigates training complexities re: geographically-distributed workforce
- Enables more rapid new-hire orientation/onboarding, compared to periodic group events
- Maximizes training productivity of subject matter experts

By way of reminder ... some advantages of online learning

- Lower cost delivery vs. other methods
- Easy to update/correct content
- Available 24/7/everywhere (home computer, work computer, mobile device) at learner's own pace
- Automatic record-keeping (for manager oversight, audits, recognition)
- Courses readily available for repetition or "JIT" review – just when you need it
- Can be used to prepare you for a live classroom session, or to follow up afterwards

Online learning is not BETTER than classroom or lab training ... it simply has advantages in certain instances that can be used in a "blended learning" environment to broaden the reach of training to a large, distributed sales and service force like E+H SC-USA.

Logging in to Learning Portal 2.0

Learning Portal 2.0

Login

Endress+Hauser SC-USA Online Learning Site

Your username is your email address on file with Endress+Hauser. Your password will be sent to you when the system is live in March 2014. The system is being migrated and will be available soon!

Note: * Required Fields.

Login Form:

* Username:

* Password:

Forgot your [password?](#)

Your username is your email address on file with Endress+Hauser.

Your initial password is “passtemp”, but must be changed during your initial login.

If you have forgotten your password, no need to contact us – just click on “Forgot your password?” to receive a reset link via email.

URL: <http://www.us.endress.com/learning>

My Assigned Learning

- Accessing training assigned to me by the organization or by my manager



My Assigned Learning

- What's here?
 - Training assigned to me by the organization
 - Training assigned to me by my manager
 - May have a due date (or a periodic recurrence, e.g. an annual requirement)
- Types of training/terminology used in the system
 - OLTs – online course training (courses/modules)
 - ILTs – “instructor-led” training (classroom sessions)
 - More on courses vs. classes later
 - LPs - Learning Plans (called “curricula” in previous online platform)
 - A collection of learning modules
 - May be a prerequisite to a classroom session (ILT), or collected together for convenience.

Welcome to Learning Portal 2.0

What can I do here?

My Required Learning: All Required

Search for:

Select a course, then choose an option below the list

Displaying records 1-9 of a total of 9.

Sort list

Results per Page: 10

Select	Course Name	Plan Name	Type	Status	Progress	Due Date	Expiration Date	Approval Status	Request Type	Test	Survey
<input type="radio"/>	Adobe Forms for ASPs		Online Course	Enrolled	Not Attempted						
<input type="radio"/>	Advanced Flow Product School (Sales)		Instructor Led	Registered	Not Attempted	1/3/2019	1/3/2019				
<input type="radio"/>	Basic Accounting Principles and Framework	Financial Fundamentals	Online Course	Enrolled	Not Attempted	3/19/2014	3/19/2014				
<input type="radio"/>	Cash Flow Management Essentials for Non-financial Professionals	Financial Fundamentals	Online Course	Enrolled	Not Attempted	3/19/2014	3/19/2014				
<input type="radio"/>	Financial Statements for Non-financial Professionals	Financial Fundamentals	Online Course	Enrolled	Not Attempted	3/19/2014	3/19/2014				
<input type="radio"/>	Principles of Accounting and Finance for Non-financial Professionals	Financial Fundamentals	Online Course	Enrolled	Not Attempted	3/19/2014	3/19/2014				
<input type="radio"/>	The Essentials of Budgeting for Non-financial Professionals	Financial Fundamentals	Online Course	Enrolled	Not Attempted	3/19/2014	3/19/2014				
<input type="radio"/>	The Whirlwind (4 min)	Franklin Covey Training - the Four Disciplines of Execution	Online Course	Enrolled	Not Attempted	1/13/2014	1/13/2014				
<input checked="" type="radio"/>	The WIG Session (9 min)	Franklin Covey Training - the Four Disciplines of Execution	Online Course	Enrolled	Not Attempted	1/13/2014	1/13/2014				

Pages: 1

Search the list

Filter the list by course type, LP, or history

Show more items

Select course with radio button; then "open" to launch course

Is course part of learning plan?

Check expiration date

INTERNAL

Scott Richardson

Endress+Hauser 

POWERED BY SUHUTOTAL SYSTEMS

Welcome to Learning Portal 2.0

Opening a course

Once a course is selected and “opened”, this window will open in the course catalog ... now click on the **course title** to start learning. Once complete, click on **Close Record** to return to the previous window.

Course Catalog: OLT Activities

Course: The WIG Session (9 min)



Submit Waiver Request

OLT Activities

Details

Progress: Not Attempted **Required:** Yes **Subscription Term Expiration:** N/A

Description:

Manager Certification implementation Video, Chapter 2 Liner Notes: "Instructional Video and vignettes illustrate key concepts and insights of 'The 4 Disciplines of Execution.'" IMPORTANT--does not autostart, please hit play button after window appears. NOTE: you can (click/drag) stretch the small screen to a size of your liking. IF THESE PLAY HALTINGLY FOR YOU...GET OFF OF VPN, OR WAIT TIL "OFF PEAK HOURS" DURING LESS NETWORK TRAFFIC AUTHOR: 3rd party (Franklin Covey) OTHER KEYWORDS: WIG, Wildy Important Goals*BIZ*SOF

[More](#)

To launch a learning activity, click the activity name below.

OLT Lessons

Activity Name	Score	Progress	Last Accessed	Time Taken	Attempts
The WIG Session (9 min)		Not Attempted			

To go back, click [Close Record](#).

INTERNAL

Endress+Hauser

Welcome to Learning Portal 2.0

An example learning plan

My Required Learning: By Plan

All Required By Course Only **By Plan** LP History History

Select Learning Plan from the list and press **Go** button to display all courses from Learning Plan. Then select the course and choose action for it.

Due Date: 3/19/2014

Expiration Date: 3/19/2014

Completion Requirement: Required Number Of Courses

Number of Required Courses: 5

Displaying records 1-5 of a total of 5.

Results per Page: 10 Show

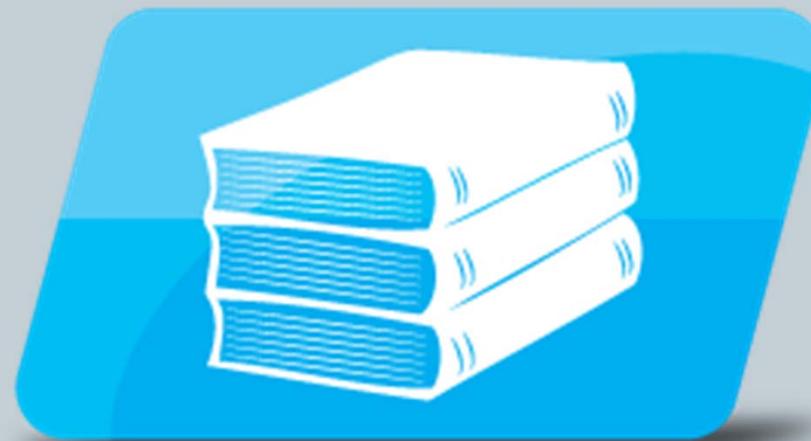
Learning Plans	Select	Course Name	Type	Status	Progress	Required	CEU	Test	Survey	Plan Type	Order
(Select One)	<input type="radio"/>	Basic Accounting Principles and Framework	Online Course	Active	In Progress	Yes	0			Traditional	1
Financial Fundamentals	<input checked="" type="radio"/>	Cash Flow Management Essentials for Non-financial Professionals	Online Course	Active	Not Attempted	Yes	0			Traditional	2
	<input type="radio"/>	Financial Statements for Non-financial Professionals	Online Course	Active	Not Attempted	Yes	0			Traditional	3
	<input type="radio"/>	Principles of Accounting and Finance for Non-financial Professionals	Online Course	Active	Not Attempted	Yes	0			Traditional	4
	<input type="radio"/>	The Essentials of Budgeting for Non-financial Professionals	Online Course	Active	Not Attempted	Yes	0			Traditional	5

Open Drop Course

Pages: 1

Navigating the Course Catalog

- How do I find additional training opportunities?



Course Catalog

What can I do here?

- Online courses – multiple ways to find what I need
 - Search by category
 - “Expand/Collapse All”
 - This will sort course offering by categories
 - Select your category, then select “Go” ...

Example: Analytics courses

Course Catalog: By Category

Featured Courses Bundles **By Category** Alphabetically ILT Calendar Online Resources

To view the courses within a category, adjust the tree view by selecting expand (+) or collapse (-) then click **Go**. Click **Details** or the name of the course to view its details.

Categories Displaying records 1-10 of a total of 29. Results per Page:

- Industry
 - Chemical
 - Environmental
 - Food & Beverage
 - Life Sciences
 - OEMs
 - Oil & Gas
 - Power
 - Primaries
 - Pulp & Paper
 - Renewable Energy
- Process Variable
 - Analytics** ← 1
 - Flow
 - Level
 - Pressure
 - Services
 - Solutions
 - Temperature
 - Viscosity/Density
 - z-Other
- Accessories
- Energy
- Recorders
- Technology
- z-Other

Expand/Collapse All Select All

Go ← 2

epointportal.com

CM42 Liquiline: pH Calibration (23 min)
Training Type: Online Course Vendor: Endress+Hauser, Inc. Duration: 23 minutes

Description:
Adam LaFlower presents this module specifically for Service personnel which covers discusses calibrating pH with Liquiline CM42. Specifically, it covers calibration set up and programming, as well as cleaning, two point calibration, and grab sample calibration. ____ EXPIRY: none

CM44 and CM44-R Transmitters (31 min) Featured Course
Training Type: Online Course Vendor: Endress+Hauser, Inc. Duration: 31 minutes

Description:
Steve Smith introduces the CM44 and CM44-R Liquiline transmitter family for Analytics sensors, including field-mount and DIN-rail mount versions. The transmitters feature expandability (add additional sensors), a unique panel installation concept, and an optional display with the DIN-rail mount version. ____ KEYWORDS: Modbus Profibus Foundation Fieldbus HART Ethernet/IP web server OEMs panel builders Memosens CM442 CM444 CM448 power supply order structures

Disinfection Applications -- Chlorine Measurement (28 min)
Training Type: Online Course Vendor: Duration:

Description:
Bhupen Patel shares the fundamentals of using chlorine for disinfection in drinking water, including the chemical terminology for the various species of chlorine used, how each type of chlorine is measured, and the range of sensors and transmitters available from E+H to measure chlorine. Make sure to download the white paper from Roseville, CA, co-written by the customer and Industry Manager Robert Lagrange EXPIRY: none OTHER KEYWORDS: total chlorine free chlorine combine chlorine hypochlorous acid hypochlorite ion trichloroisocyanuric acid DPD amperometric CA71Cl CCS141 CCS120 CCM182 CCM223 CCM253 CCS140 CCS240 CCS241 CCA250 CCA250 CCE1 CM330 Liquiline Liquisys Memosens CCS142D CE11 EPA SDWA Groundwater rule disinfection by-products rule PWS

Dissolved Oxygen -- Oxymax COS22/D probes (20 min)
Training Type: Online Course Vendor: Duration:

Description:
Fred Kohlmann introduces the Oxymax COS22 and COS22D dissolved oxygen probes, covering the following topics: strategy/target markets, technology, features/advantages/benefits, installations and applications, competition, sales information, marketing communication, and service-

Welcome to Learning Portal 2.0

Search by text

Course Catalog: Alphabetically

Search for:

Select a letter range to view from the drop-down menu then click . Click or the name of the course to view details.

Select Letter Range:

Displaying records 1-7 of a total of 7.

Integrity Solutions Selling program--What is it? (2min)

Training Type: Online Course Vendor: Duration:

Description:

quick overview of the multi-week 'Integrity Solutions Selling' program EXPIRES: revisit May 2013 OTHER KEYWORDS: projects, sales, high level

Plant Asset Management [PAM] - an introduction (8 min)

Training Type: Online Course Vendor: Duration:

Description:

this is an introduction/awareness course about PAM (plant asset management), one of the SC-USA "core" Solutions Segments. This is created as a prerequisite course to attending live Integrity Solutions Selling classes/workshops, but is suitable for everyone to get a first leg-up on the topic. AUTHOR: Michael Robinson EXPIRY: none OTHER KEYWORDS: solutions products, value proposition, plant assets, installed base, services, documentation, procedures, engineering, selection, procurement, installation, commissioning, startup, start-up, operations, maintenance, repair, spares, spare parts, calibration, replacement, life cycle management, W@M

Solution Selling: Creating New Opportunities

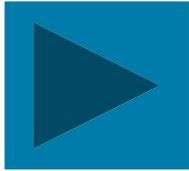
Training Type: Online Course Vendor: Skillsoft Duration: 1 hour

Description:

For most sales professionals, prospecting for new customers and making those initial sales calls is a big part of their job. But that doesn't mean it's easy. Conducting prospecting calls is one of the most difficult skills to learn. Potential customers aren't always aware of their needs and often don't appreciate a stranger pointing out their problems. It's the job of the sales professional to recognize potential pain, approach each customer in a tactful and appropriate manner, determine the right solution, and present it in an engaging way that helps the customer make an informed decision. This course explains how to approach sales opportunities when the customer's need is unexpressed or unclear, including how to research a customer's business, identify potential problems, and guide the customer through an exploration of the problem and solution. You'll learn skills needed to carry out planning and research, diagnosing a customer's need, and enticing customers to acknowledge and speak openly about their business problems. And you'll learn some basic calculations used to ensure your solutions are financially beneficial to both you and your customers. TargetAudience=Sales professionals who want to develop their solution selling skills

- Select “Alphabetically”
- Enter up to two text search terms (order matters ... try both ways!)
- Click the course title in order to open enrollment screen

Search by text



Click for
Advanced
Searching

Course Catalog: Details

Course: Plant Asset Management [PAM] - an introduction (8 min)

Close Record

Enroll

Details

◀ Back



Enroll

Course Name: Plant Asset Management [PAM] - an introduction (8 min)

Status: Active

Description: this is an introduction/awareness course about PAM (plant asset management), one of the SC-USA "core" Solutions Segments. This is created as a prerequisite course to attending live Integrity Solutions Selling classes/workshops, but is suitable for everyone to get a first leg-up on the topic. AUTHOR: Michael Robinson EXPIRY: none OTHER KEYWORDS: solutions products, value proposition, plant assets, installed base, services, documentation, procedures, engineering, selection, procurement, installation, commissioning, startup, start-up, operations, maintenance, repair, spares, spare parts, calibration, replacement, life cycle management, W@M

Prerequisite Courses: None

Delivery Type: Online Course

Course Code: 258895

Vendor:

CEU: 0

Duration:

Cost to Learner: \$0.00

◀ Back

Enroll

- Enroll in the course
- On next screen, click on title to launch course
- Or, continue to search and add titles to your queue in "My Self-Assigned Learning"

Types of online courses in the Learning Portal

- Voiced presentations
 - This type of content generally created by E+H subject matter experts (e.g., training managers, product and industry managers, product specialists)
 - Will need ear buds/head phones to listen in the office!
 - This type of content will “bookmark” to correct place if you have to leave and return later.
- Masterclass modules
 - Content produced by E+H corporate ... with interactive learning elements
 - Now this content should perform better ... correctly bookmarking and marking you as complete when you finish the module (be sure to access EVERY slide!)
- Videos
 - Often embedded in presentations in order to work correctly in the system
 - Can be recorded online webinars
- Exams
 - ISEmetrix exams created specifically for E+H ISEs, but available to all
 - Quizzes embedded in presentation modules (to check your learning comprehension, or as part of learning certification)

My Self-Assigned Learning

- My personal “training queue”



My Self-Assigned Learning

- What's here?
 - “Electives” -- online courses I've selected to learn from, but either haven't attempted or haven't completed
 - Upcoming Instructor-led training (classroom) for which I've enrolled

My Elective Learning: All Electives

Search for:

Select a course, then choose an option below the list.

Displaying records 1-10 of a total of 23.

Results per Page

Select	Course Name ▲	CourseType	Approval Status	Status	Progress	Due Date
<input type="radio"/>	0005 Density (17 min)	Online Course		Enrolled	In Progress	
<input type="radio"/>	Basic DP Flow [Masterclass] (45 minutes)	Online Course		Enrolled	In Progress	
<input type="radio"/>	CM44 and CM44-R Transmitters (31 min)	Online Course		Enrolled	In Progress	
<input type="radio"/>	Configuring and Administrating SharePoint 2010 Search	Online Course		Enrolled	In Progress	
<input type="radio"/>	Customer Service Confrontation and Conflict	Online Course		Enrolled	In Progress	
<input type="radio"/>	Digital Communication [Masterclass] (60 min)	Online Course		Enrolled	In Progress	
<input type="radio"/>	Global Reference Pricing [Masterclass] (45 min)	Online Course		Enrolled	In Progress	
<input type="radio"/>	Indumax CLS54D Conductivity sensor (11 min)	Online Course		Enrolled	In Progress	
<input type="radio"/>	Introduction to Pressure (85 min)	Online Course		Enrolled	Not Attempted	
<input type="radio"/>	Introduction to Pressure [Masterclass] (60 min)	Online Course		Enrolled	In Progress	

■ Think of this as your personal “Training Queue”

My Learning Records

- Accessing my training history (transcript)



My Learning Records

- What's here?
 - My learning transcript
 - Courses completed
 - Courses in-progress
 - Courses not attempted yet
 - Transcript can be sorted by course or class name, completion status, or completion date
 - Use “Advanced Search” for advanced filtering of your records (e.g. only show completed classes, classroom records, or classes completed within a certain timeframe)
 - Your records can be exported in a variety of file formats, or printed

My Transcript

Search for: Go

Completed Between: # And: M/d/yyyy #

Displaying records 1-55 of a total of 55.

Your records have been migrated to LP2.0!

- Online courses completed since 2007
 - March 7-24 records gap will be filled April 2014
- Sales classroom training since 2008
- Service classroom training since 2012

Select	Course Name	Class Name	Completion Status	Registration Date	Completion Date	Course CEU	Registration Status	Grade
<input type="radio"/>	Advanced Flow Product School (Sales)					0	Registered	
<input type="radio"/>	Integrity Solutions Selling program--What is it? (2min)	Integrity Solutions Selling program--What is it? (2min)	Completed	4/24/2013 4:04:43 PM	4/24/2013 4:06:55 PM	0	Enrolled	100
<input type="radio"/>	Basic Concepts in Measuring Technology [Masterclass] (60 min)	Basic Concepts in Measuring Technology [Masterclass] (60 min)	Completed	6/19/2013 1:14:59 PM	6/19/2013 1:25:54 PM	0	Enrolled	80
<input type="radio"/>	2010 Sexual & Other Forms of Unlawful Harassment--(9min)	2010 Sexual & Other Forms of Unlawful Harassment--(9min)	Completed	6/20/2013 11:00:05 AM	6/20/2013 11:01:11 AM	0	Enrolled	100
<input type="radio"/>	QUIZ-2010 Sexual & Other Forms of Unlawful Harassment (5min)	QUIZ-2010 Sexual & Other Forms of Unlawful Harassment (5min)	Completed	6/20/2013 11:01:34 AM	6/20/2013 11:02:42 AM	0	Enrolled	100
<input type="radio"/>	Solicap M FTI55 and FTI56 (9 min)	Solicap M FTI55 and FTI56 (9 min)	Completed	7/17/2013 4:41:59 PM	7/17/2013 4:44:19 PM	0	Enrolled	0
<input type="radio"/>	Using Applicator to size Gamma Measurement Points (21 min)	Using Applicator to size Gamma Measurement Points (21 min)	Completed	7/17/2013 5:14:18 PM	7/17/2013 5:15:41 PM	0	Enrolled	0
<input type="radio"/>	Building a Personal Success Foundation (28 min)	Building a Personal Success Foundation (28 min)	Completed	7/30/2013 9:23:35 AM	7/30/2013 9:26:37 AM	0	Enrolled	0
<input type="radio"/>	Customer benefits of FDT Technology [1]--(4 min)	Customer benefits of FDT Technology [1]--(4 min)	Completed	8/6/2013 11:22:08 AM	8/6/2013 11:24:11 AM	0	Enrolled	0
<input type="radio"/>	2010 Preventing Sexual Harassment ch1 (5 min)	2010 Preventing Sexual Harassment ch1 (5 min)	Completed	8/6/2013 11:28:55 AM	8/6/2013 11:30:21 AM	0	Enrolled	0
<input type="radio"/>	Are You Mismanaging Yourself (29 min)	Are You Mismanaging Yourself (29 min)	Completed	8/6/2013 11:35:43 AM	8/6/2013 1:05:05 PM	0		
<input type="radio"/>	Basic concepts in measuring technology (SCORM 1.2)	Basic concepts in measuring technology (SCORM 1.2)	Completed	8/15/2013 3:06:55 PM	8/15/2013 3:17:50 PM	0		
<input type="radio"/>	Awareness: Start-Up Ordercode XD21BL (5 min)	Awareness: Start-Up Ordercode XD21BL (5 min)	Completed	12/30/2013 4:55:03 PM	12/30/2013 4:55:24 PM	0		
<input type="radio"/>	Covey-4 Discip's_Chapt 1_Your Best Moment (2 min)	Covey-4 Discip's_Chapt 1_Your Best		1/3/2014 2:20:03 PM	2/17/2014 2:38:56 PM	0		
<input type="radio"/>	The Dashboard (7 min)			1/3/2014 2:20:03 PM	2/17/2014 2:39:36 PM	0		
<input type="radio"/>	The WIG Session (9 min)			1/3/2014 2:20:03 PM	2/19/2014 11:10:55 AM	0		

Note: for online modules, course name = class name; for classroom records, class name will also indicate DATE of class, in addition to course subject

Transcript can be sorted by:

- Course/class name
- Registration and completion dates
- Completion status

Or can be searched for specific class names or dates

INTERNAL

cott Richardson

Classroom records

Want to see only your classroom records?

- Sales training (product/industry schools) since 2008
- Service training (certified service schools) since 2012

My Transcript

Search for: Go **1**

Completed Between: # And: M/d/yyyy #

Search Fields: Course Name Course Description Class Name

Filter Results:

Registration Status: (Any)

Completion Status: (Any)

Course Type: Instructor Led **2**

Displaying records 1-3 of a total of 3. Results per Page: 200 Show

Select	Course Name ▲	Class Name	Completion Status	Registration Date	Completion Date	Course CEU	Registration Status	Grade
<input type="radio"/>	Advanced Flow Product School (Sales)	Sales Advanced Flow 04-2011	Completed	4/15/2011 8:00:00 AM	4/15/2011 8:00:00 AM	0	Enrolled	
<input type="radio"/>	Level and Flow Product Schools (Sales)	Sales Level and Flow 06-2010	Completed	6/11/2010 8:00:00 AM	6/11/2010 8:00:00 AM	0	Enrolled	
<input type="radio"/>	Pressure and Temperature Product Schools (Sales)	Sales Pressure Temperature 04-2010	Completed	4/29/2010 8:00:00 AM	4/29/2010 8:00:00 AM	0	Enrolled	

My Certificates

- Printing training certificates



Welcome to Learning Portal 2.0

Links to print certificates

My Completion Certificates

Course Completion Certificates



My Certificates

[Click here](#) to print Certificates for **My Self Assigned Learning**. These are courses you enrolled in.

[Click here](#) to print Certificates for **My Assigned Learning**. These are courses that were assigned to you.

If the course was ASSIGNED to you, you'll be able to print the certificate in "My Assigned Learning" ... if the course was SELECTED by you, you'll be able to print the certificate in "My Self Assigned" Learning.

Click the link to search for the course for which you want to print a certificate ...

E.g. “My Self-Assigned Learning”

My Elective Learning: History

Search for:

Select a course, then choose an option below the list.

Displaying records 1-10 of a total of 13. Results

Select	Course Name ▲	CourseType	Approval Status	Status	Completion Date	Progress	Due
<input type="radio"/>	2010 Preventing Sexual Harassment ch1 (5 min)	Online Course					
<input type="radio"/>	2010 Sexual & Other Forms of Unlawful Harassment--(9min)	Online Course					
<input type="radio"/>	Are You Mismanaging Yourself (29 min)	Online Course					
<input type="radio"/>	Awareness: Start-Up Ordercode XD21BL (5 min)	Online Course					
<input type="radio"/>	Building a Personal Success Foundation (28 min)	Online Course					
<input type="radio"/>	Customer benefits of FDT Technology [1]--(4 min)	Online Course					
<input type="radio"/>	Energy Solutions [Masterclass] (45 min)	Online Course					
<input type="radio"/>	Integrity Solutions Selling program--What is it? (2min)	Online Course					
<input type="radio"/>	Kevin Bischoping -- VP Sales -- Business Plan 2014 (39 min)	Online Course					
<input type="radio"/>	Nancy Winter - Controlling 2014 Business Plan meeting (10 min)	Online Course					

- Select a course ...
- Then “Print Certificate”
- Not all courses allow printing of certificates ... contact us if you need a course to be modified to allow certificate printing and we will respond within 1 business day.

Welcome to Learning Portal 2.0



Endress+Hauser Training

2010 Preventing Sexual Harassment ch1 (5 m)

Endress+Hauser certifies that

Scott Richardson

has successfully completed the online
course on 8/6/2013

Instructor/subject matter expert: _____



Scott Richardson

Scott Richardson
Training Manager, Technical Sales

Endress+Hauser 
People for Process Automation

Endress+Hauser 

ISEmetrix

- Accessing ISEmetrix exams



Link directly to the ISEmetrix exams

Search

Search Term(s) :

Hide Options

Displaying records 1 - 6 of a total of 6 .

Results per Page:

- All Types
- Courses
 - Instructor Led Classes
 - Featured
 - Bundles
 - Online Resources
- All Categories
 - Industry
 - Process Variable
 - Technology
 - z-Other
- Reset All

[ISEmetrix: Analytics Basics Exam](#)

Type: **Online Course** ISEmetrix "Analytics Basics". This exam is intended to test one's understanding of analytics fundamentals and some basic level of product knowledge. Please use any non-passing result as a baseline for further improvement, by highlighting knowledge gaps for further study. Other information about [...]

[Show details](#)

[ISEmetrix: Basic Engineering exam](#)

Type: **Online Course** ISEmetrix "examination #1". This exam is intended to test one's understanding of basic technology issues that surround applications. It is not intended to test for specific product, application or industry knowledge. Those exams will come later. Please use any non-passing result as a baseline [...]

[Show details](#)

[ISEmetrix: Flow Basics Exam](#)

Type: **Online Course** ISEmetrix "Flow Basics". This exam is intended to test one's understanding of flow fundamentals and some basic level of product knowledge. Please use any non-passing result as a baseline for further improvement, by highlighting knowledge gaps for further study. Other information about how the [...]

[Show details](#)

[ISEmetrix: Level Basics exam](#)

Type: **Online Course** ISEmetrix "Level Basics". This exam is intended to test one's understanding of level fundamentals and some basic level of product knowledge. Please use any non-passing result as a baseline for further improvement, by highlighting knowledge gaps for further study. Other information about how th [...]

[Show details](#)

[ISEmetrix: Pressure Applications Exam](#)

Type: **Online Course** Note that the "info slides" at the beginning of this type of exam (APPLICATION) will advise you to download a document with application drawings before you begin (some drawings are in the exam questions themselves, but for others there was insufficient room to be large/clear enough. Refer to t [...]

[Show details](#)

Featured Courses

- What's new in the Learning Portal?



Welcome to Learning Portal 2.0

Featured Courses

Search

Search Term(s) :

Hide Options

Displaying records 1 - 5 of a total of 5 .

- All Types
- Courses
- Instructor Led Classes
- **Featured**
- Bundles
- Online Resources

- **All Categories**
- Industry
- Process Variable
- Technology
- z-Other

Reset All

[Achieving Goals through Perseverance and Resilience](#)

Type: **Online Course** Duration: **1 hour** Obstacles and setbacks can be overcome. Watching your best-laid plans fall to pieces and go off track. To succeed, you need to be resilient. This course provides strategies for achieving your goals and this requires resilience and perseverance. This course provides...

[Show details](#)

[CM44 and CM44-R Transmitters \(31 min\)](#)

Type: **Online Course** Duration: **31 minutes** Steve Smith introduces the CM44 and CM44-R transmitter family for Analytics sensors, including field-mount and DIN-rail mount versions. The transmitters feature easy installation (field or DIN-rail sensors), a unique panel installation concept, and an optional display with the DIN-rail mount [...]

[Show details](#)

[Essential Selling Skills: Closing the Sale](#)

Type: **Online Course** Duration: **1 hour** One of the most difficult steps in any sales effort is securing the sale. When is the best time to ask for the order? What if the prospect doesn't seem interested or challenges the merits of your proposal? This course demonstrates how to leverage your value proposition in the final stages of the sales process [...]

[Show details](#)

[Indumax CLS54D Conductivity sensor \(11 min\)](#)

Type: **Online Course** Duration: **11 minutes** Fred Kohlmann introduces the CDL54D Indumax Conductivity sensor -- a hygienic toroidal sensor with fixed cable Memosens technology. Common uses: CIP applications, concentration measurement, interface detection, leakage detection... KEYWORDS: electrodeless non-contact inductive food and beverage [...]

[Show details](#)

[Online Customer Training: "End User Academy" \(14 min\)](#)

Type: **Online Course** Duration: **14 minutes** In this brief module, Training Manager Jerry Spindler covers our new online training product for customers, the Endress+Hauser End User Academy. It covers the value of the product, why we need it, how to sell it, and how to order it once sold.

[Show details](#)

Here we highlight "featured" courses:

- What's NEW in the Learning Portal
- NEW TYPES of courses you may not have seen before

Searching the Knowledge Bank

- Getting the information I need



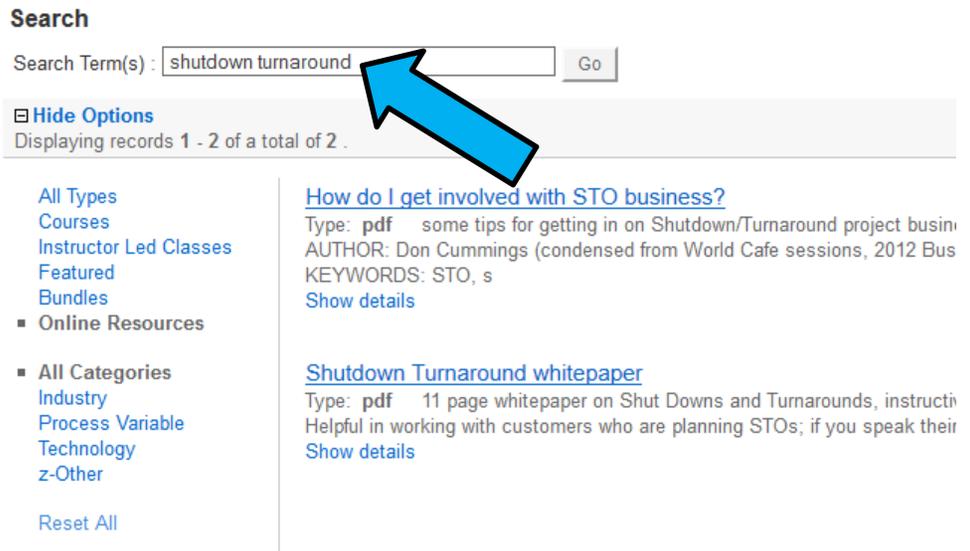
A more searchable Knowledge Bank

- Since 2009, the Training Group has provided access on the Learning Portal to nearly 3000 documents that continue to be collected and archived in the Knowledge Bank on a variety of product and industry topics.
- Unfortunately, a “clunky” search engine frustrated many of you.
- These items can be sources of significant learning, quickly answer your questions (or your customers’), and significantly improve our organizational productivity by saving each of us time every day and every week from fruitless searching for needed information.
- Now on Learning Portal 2.0, these “Knowledge Bits” will be significantly easier to search ... and FIND.

Example 1: Shutdown Turnaround

Need information on how to help your customers during “shutdowns and turnarounds”?

Just click on KB, and search for “shutdown turnaround” ... and we find two relevant documents:



Search

Search Term(s) :

[Hide Options](#)
Displaying records 1 - 2 of a total of 2 .

- [All Types](#)
- [Courses](#)
- [Instructor Led Classes](#)
- [Featured](#)
- [Bundles](#)
- [Online Resources](#)
- [All Categories](#)
- [Industry](#)
- [Process Variable](#)
- [Technology](#)
- [z-Other](#)
- [Reset All](#)

[How do I get involved with STO business?](#)
Type: pdf some tips for getting in on Shutdown/Turnaround project busin
AUTHOR: Don Cummings (condensed from World Cafe sessions, 2012 Bus
KEYWORDS: STO, s
[Show details](#)

[Shutdown Turnaround whitepaper](#)
Type: pdf 11 page whitepaper on Shut Downs and Turnarounds, instructi
Helpful in working with customers who are planning STOs; if you speak their
[Show details](#)

Example 2: Fermentation

Searching for “fermentation” yields 6 documents, “fermentation process” returns 3 documents, and “ferment” lists 12 documents.

Refine your search results by selecting a “Category” to add to the search (left panel) ... for instance, search for “fermentation” in the “Food and Beverage” industry like this:

The screenshot shows a search interface with the following elements:

- Search** section: A search bar containing the text "fermentation" with a "Go" button to its right. A red arrow labeled "1" points to the search bar.
- Hide Options** section: A button to toggle search options, with the text "Displaying records 1 - 1 of a total of 1 ."
- Navigation** section: A list of filters on the left side:
 - All Types
 - Courses
 - Instructor Led Classes
 - Featured Bundles
 - Online Resources
 - All Categories
 - ← Back To Industry
 - Food & Beverage (highlighted with a red arrow labeled "2")
 - Reset All
- Search Results** section: A single result titled "Foam Detection in Fermentation process Food and Beverage". The details include: Type: pdf, The application note describes the use of Liquiphant M to detect foam lev, ISSUED: 08/2008 EXPIRY: none KW: Liquiphant M, foam detection, fermentation, tuni, and a "Show details" link.

Example 3: Applications in Environmental industry

Looking for applications in Water/Wastewater (Environmental) to better understand your customer's processes? Searching for "application" in the Industry > Environmental category yields 66 documents. Adding the term "flow" in the search bar refines the list to 6 applications.

The screenshot shows a search interface with the following elements:

- Search Bar:** Contains the text "application flow" and a "Go" button. A blue arrow points to the search bar.
- Navigation:** A "Hide Options" button and a "Results per Page: 10" dropdown menu with a "Show" button.
- Left Sidebar:** A list of categories including "All Types", "Courses", "Instructor Led Classes", "Featured Bundles", "Online Resources", "All Categories", "Back To Industry", "Environmental", and "Reset All". A blue arrow points to the "Environmental" category.
- Search Results:** Three results are displayed:
 - FMU40 Ultrasonic Open Channel Flow Measurement- Wastewater:** Type: pdf. Description: "The application note describes the use of Prosonic M to measure the flow rate of wastewater into a treatment plant AUTHOR: Marketing Dept ISSUED: 09/2008 EXPIRY: none OTHER KEYWORDS: Prosonic M, FMU40, ultrasonic, transit time, Doppler, open channel flow". Includes a "Show details" link.
 - Magphat application at Bush Beans; plant wastewater:** Type: jpg. Description: "although Magphat is not a current product offering, this application story regarding the monitoring of daily food cleaning wastewater amounts is still instructive re the application and can be applied to other E+H flow 'monitoring' products. AUTHOR: Mark". Includes a "Show details" link.
 - Proline 93 Ultrasonic Flowmeters Gain Acceptance- Wastewater:** Type: pdf. Description: "The application note describes the benefits on Prosonic 93 in the water and wastewater industry AUTHOR: Marketing Dept ISSUED: 07/2008 EXPIRY: none KW: Prosonic 93C, ultrasonic, transit time, Doppler, in-line, flowmeters, wastewater, instrumentations, ins". Includes a "Show details" link.

A Knowledge “Bank” needs deposits and withdrawals

Searching the KB has never been so easy ...
and documents will continue to be added here
in order to have a “one stop shop” for helpful
information from which to learn.

Have information you think others could
benefit from? First search the KB to see if it’s
already been deposited; if you don’t find it,
send it to knowledge.bank@us.endress.com
and we’ll add it to the nearly 3000 documents
already in place.



Search functionality explained (Boolean logic perspective)

FOR THE DETAIL-ORIENTED AMONG US:

- Keep in mind ... if you select more than ONE category in the list, that all documents in EITHER category that contain the search terms in the title or description will be returned.
- In other words, if you select “Life Sciences” and “Pressure” categories, looking for “ceramic”, the system will return all documents containing the word “ceramic” in “Life Sciences” OR in “Pressure” categories.
- Future upgrades to the system MAY include the ability to specify two categories and find documents that are tagged for BOTH categories (this would be “AND” functionality from a Boolean logic perspective).
- If you need assistance understanding what the system is returning from your search terms, please contact us.

Registering for classroom training

- Finding upcoming classes (Sales classes only for now ... soon, for Service as well)



Welcome to Learning Portal 2.0

How to register for classroom training

Based on your user profile, you will be able to see applicable classroom training in the course catalog ...

Course Catalog: Alphabetically

Search for:

Search Fields: Course Name Course Code Course Description Vendor Name Class Name Class Description Session Date (m/d/yyyy) Instructor

Filter Results:

Course Category:
Course Type:
Location:
Classroom:

Select a letter range to view from the drop-down menu then click . Click or the name of the course to view its details.

Select Letter Range:

Displaying records 1-2 of a total of 2. Results per Page:

Analytical Product School (Sales)

Training Type: Instructor Led Vendor: Endress+Hauser, Inc. Duration: 28 hours

Description:

Welcome to Learning Portal 2.0

How to register for classroom training

Selecting “Scheduled classes” for a particular course will show you upcoming instructor-led training for which you can register/enroll ...

Course Catalog: Scheduled Classes
Course: Analytical Product School (Sales) Close Record

Details **Scheduled Classes**

To view class details, enroll, or put yourself on a waitlist, select the class below and click [View Details](#) . To see how a class below fits into your schedule, select the class below and click [View My Class Schedule](#) .

Displaying records 1-1 of a total of 1. Results per Page: 10 Show

Select	Class Name	Class Schedule	Location(s)	Instructor(s)	Number of Open Seats	Request Required
<input type="checkbox"/>	Sales Analytical 04-2014	4/14/2014 - 4/17/2014, 8:00 AM - 1:00 PM (America/New_York) (UTC -05:00) *	N/A		18	No

[All](#)

[Bucket](#) [View Details](#) [View](#)

Pages: 1

Class Details: Sales Analytical 04-2014

Course Name: Analytical Product School (Sales)
Class Name: Sales Analytical 04-2014
Class Code: SalesAnalytical0414

Class Description: Basic Analytics Product School, covering e-chem technologies (pH, conductivity, turbidity/suspended solids, dissolved oxygen, chlorine), samplers and analyzers. Includes a segment on water/wastewater industry as a key application area for Analytics instrumentation. Classroom sessions, hands-on lab demonstrations.

Contact Name:
Contact Phone:
Private Class: No

Maximum Class Capacity: 18
Open Seats: 18
Class Cost to Learner: \$0.00
Vendor Name: Endress+Hauser, Inc.

Class Session Schedule

Session Name	Location	Classroom	Times	Instructor(s)
Session 1	N/A	N/A	Monday, April 14, 2014 8:00 AM to 5:00 PM (America/New_York) (UTC -05:00)	N/A
Session 2	N/A	N/A	Tuesday, April 15, 2014 8:00 AM to 5:00 PM (America/New_York) (UTC -05:00)	N/A
Session 3	N/A	N/A	Wednesday, April 16, 2014 8:00 AM to 5:00 PM (America/New_York) (UTC -05:00)	N/A
Session 4	N/A	N/A	Thursday, April 17, 2014 8:00 AM to 1:00 PM (America/New_York) (UTC -05:00)	N/A

[View My Class Schedule](#) [Enroll in this Class](#)



Enroll

Still have questions?

- Accessing Learning Portal FAQs
- Contact us via email



Welcome to Learning Portal 2.0

Learning Portal FAQs

At the present time, THIS document serves as the FAQ document. Eventually we will build a true FAQ system addressing frequently asked questions.

Contact Us



Contact Us

Click the “Contact Us” button to send us an email for support, assistance finding courses, or feedback on how to make the LMS work better for you ...

Or just to tell us we’re doing an incredibly fantastic job and to have a great day. 😊

Send Send and File... Save as Draft Delivery Options... ▶ 📎 Signature ▾

High importance Return receipt Sign

 **To:**

Cc:

Bcc:

Subject:

I need help!

Contact Us (Advanced)



Contact Us

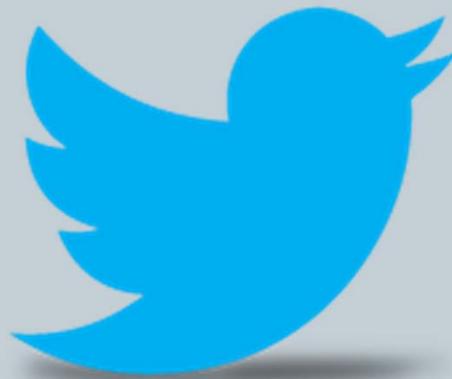
If the “Contact Us” link doesn’t work for you, you may need to update your “Mailto” protocol association in your Windows Control Panel. For instance, here at E+H, be sure that “MAILTO” is set to Lotus Notes, as shown ...

The screenshot shows the 'Set Program Associations' window in Windows. The breadcrumb path is: Control Panel > All Control Panel Items > Default Programs > Set Default Programs > Set Program Associations. The window title is 'Set associations for a program' and the subtitle is 'Set the extensions you want this program to open by default, and then click Save.' The program is identified as 'Lotus Notes Mail' by 'International Business Machines Corporation'. There is a 'Select All' checkbox. A table lists the associations:

Name	Description	Current Default
Extensions		
<input checked="" type="checkbox"/> .eml	eml file	IBM Lotus Notes/Domino
Protocols		
<input checked="" type="checkbox"/> MAILTO	Lotus Notes	IBM Lotus Notes/Domino
MAPI		
<input checked="" type="checkbox"/> Send mail	Send mail command	Lotus Notes

Other ways to learn

- E+H SC-USA Twitter feed
- E+H Corporate YouTube channel



Endress Hauser US Twitter



Endress Hauser AG YouTube

Welcome to Learning Portal 2.0

Stay connected with us via Twitter – learn what's new!



Endress+Hauser USA (EndressHauserUS) on Twitter - Mozilla Firefox

Home Connect Discover Me

Search

Tweets >
Following >
Followers >
Favorites >
Lists >

Tweet to Endress+Hauser USA

@EndressHauserUS

Level Process Flow

Photos and videos >

Who to follow · Refresh · View all

- Ravi Zacharias** @RaviZach...
Followed by Matt Giebler an...
Follow
- Story Warren** @StoryWarren...
Follow
- Tony La Russa** @TonyLaRu...
Follow

Popular accounts · Find friends

Endress+Hauser USA
@EndressHauserUS
The People for Process Automation
Indiana · us.endress.com

TWEETS 1,119 FOLLOWING 277 FOLLOWERS 1,363

Following

Followed by Rockwell Automation, Gillian Lyngh, Endress+Hauser Group and Tim Thomas.

Tweets

- Endress+Hauser USA** @EndressHauserUS · 22h
RT @ISA_Interchange: One study shows 80% of automation project fail. Why are automation projects so challenging? ar.gy/5aLL
- Endress+Hauser USA** @EndressHauserUS · Feb 18
@SMEcommunity annual meeting coming up Feb 23-26 in Salt Lake City! Stop by and see us in booth 2500! More details: ow.ly/tJV7v
- Endress+Hauser USA** @EndressHauserUS · Feb 17
Questions about explosion protection guidelines? Download our informative guide: ow.ly/tHPwf #pauto #safety

Welcome to Learning Portal 2.0

Keep learning on YouTube from Endress+Hauser

YouTube

Search Upload

EH endress.com

Endress+Hauser

Subscribed 4,319

Home Videos Discussion About

What to watch next

Recent activity

Process Training University at Endress+Hauser USA

by Endress+Hauser 647 views

Level measurement

Videos about level measurement technology and products of Endress+Hauser.
More information: www.products.endress.com/level

Electronic production for level 1:51

Assembly LIQUIPHANT 6:27

Assembly PROSONIC M - fina 4:00

Videos from USA and Endress+Hauser corporate sources ... many are instructive for yourself (and for your customers).

New videos added almost weekly, so check back often.

Advanced Searching

- Universal Search – for online courses, classroom training, online resources (Knowledge Bank)



Welcome to Learning Portal 2.0

How to access “Universal Search”

Learning Portal 2.0

From the home page, enter your search term(s) and click “Go”

The screenshot shows the 'Learning Portal Home' interface. On the left side, there is a vertical menu with the following items: 'My Shortcuts', 'My Profile', 'search terms', and 'Go'. The 'search terms' item is circled in pink, and a blue arrow points to the 'Go' button below it. The main content area is titled 'Learning Portal Home' and contains several sections: 'System Announcements' with a sub-section 'Go Live during week of March 24th!' and a description 'We will go live with Learning Portal 2.0 during the week of March 24th ...'; 'My Learning' section with two blue buttons: 'My Assigned Learning' (with an exclamation mark icon) and 'My Self-Assigned Learning' (with a checkmark icon); and a partially visible 'My Learning' section at the bottom.

“Universal Search”: search for ANYTHING in the system

- **All Types**
 - Courses
 - Instructor Led Classes
 - Featured
 - Bundles
 - Online Resources
- **All Categories**
 - Industry
 - Process Variable
 - Technology
 - z-Other

Filter your results by “type” of course:

- Courses (online modules)
- Instructor led classes (Sales or Service training)
- Featured courses
- Bundles (not currently used)
- Online Resources (KB articles)

Or filter by categories:

- Industry
- Process variable (measurement technologies)
- Technology topics
- Other (“Miscellaneous”)

Then use search terms to find specific items

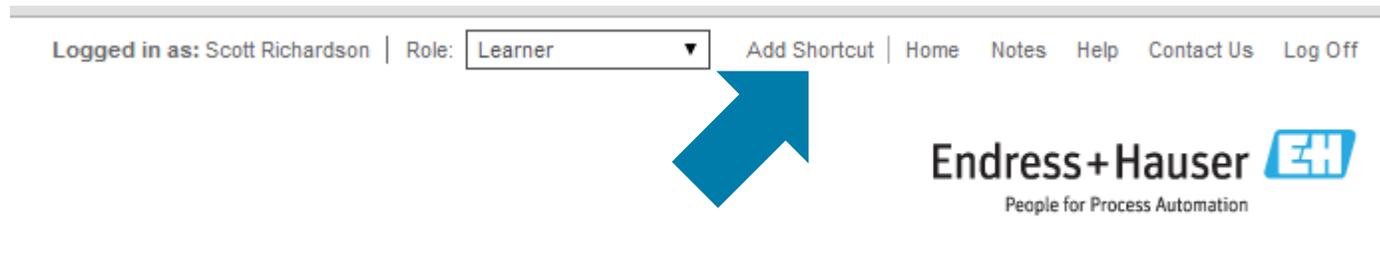
Additional topics

- My Shortcuts
- Notes
- My Profile



Shortcuts

- Like to create your own shortcuts in the Learning Portal?
- When you find a page in the system navigation you'd like to return to frequently, just click on “Add Shortcut” in the top menu bar ...



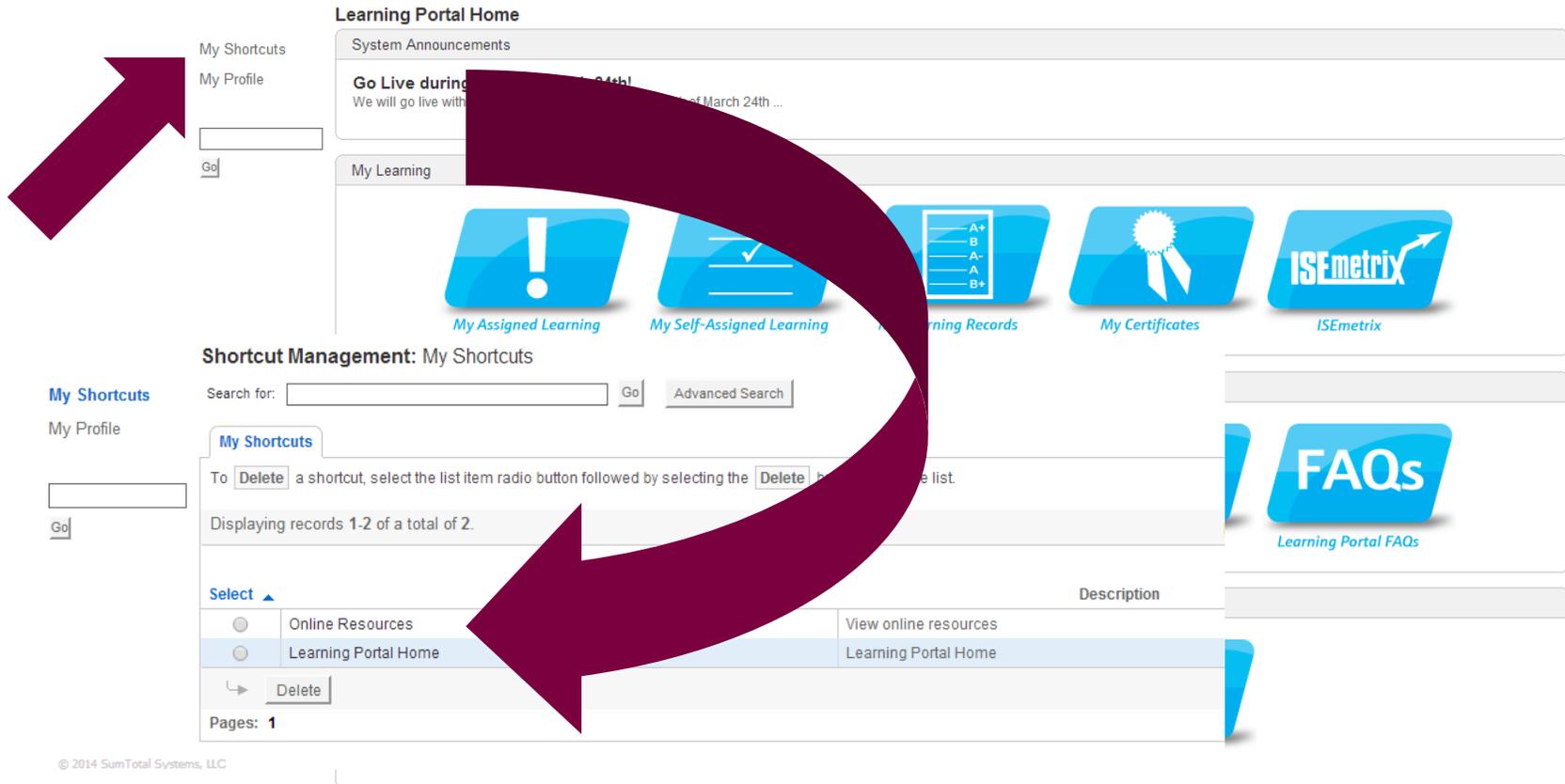
- Then you can access your list on the “Learning Portal Home” page ... see next page

Welcome to Learning Portal 2.0

Shortcuts

Learning Portal 2.0

Endress+Hauser 
People for Process Automation



Learning Portal Home

System Announcements

Go Live during ... 24th ...
We will go live with ... of March 24th ...

My Learning

 **My Assigned Learning**

 **My Self-Assigned Learning**

 **Learning Records**

 **My Certificates**

 **ISEmetrix**

Shortcut Management: My Shortcuts

Search for:

My Shortcuts

To a shortcut, select the list item radio button followed by selecting the button on the list.

Displaying records 1-2 of a total of 2.

Select	Description
<input type="radio"/>	Online Resources View online resources
<input checked="" type="radio"/>	Learning Portal Home Learning Portal Home

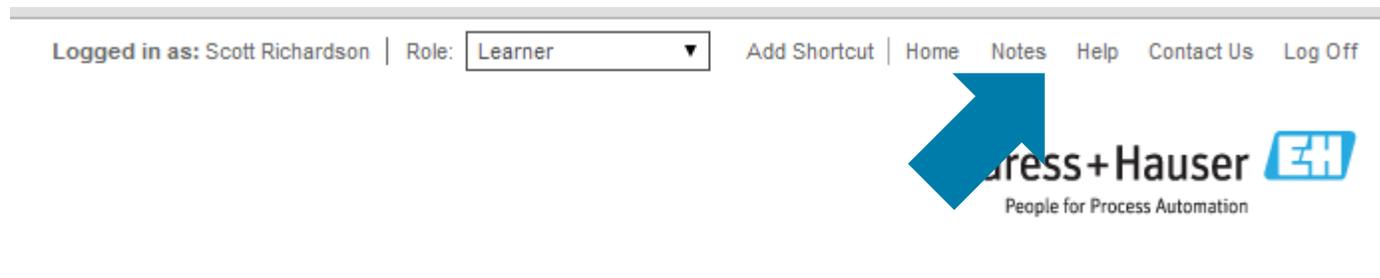
Pages: 1

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Welcome to Learning Portal 2.0

Notes

- Like to write your own notes about how to use the Learning Portal?
- Click here:

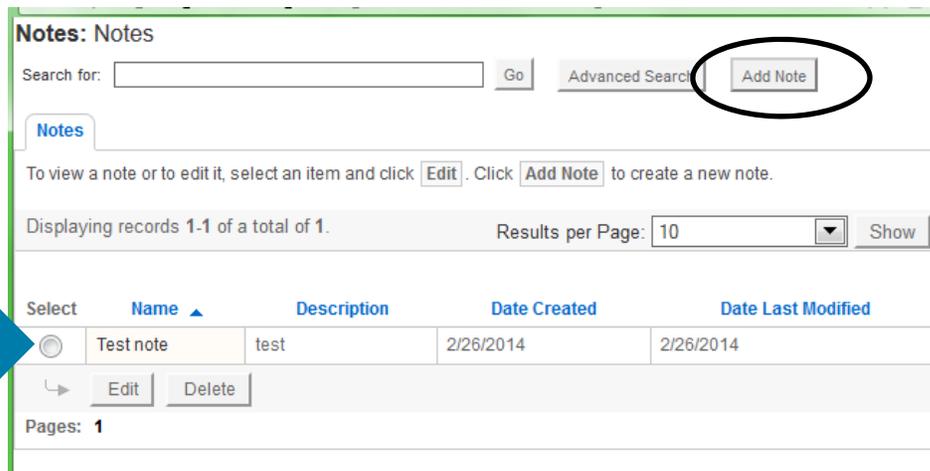


- Then you can “Add Note” ... and can access your list of personal notes in that same window.

Welcome to Learning Portal 2.0

Notes

Use this feature to make notes about how to accomplish tasks within the Learning Portal, or to keep track of courses you'd like to take in the future.



Notes: Notes

Search for:

Notes

To view a note or to edit it, select an item and click . Click to create a new note.

Displaying records 1-1 of a total of 1. Results per Page:

Select	Name ▲	Description	Date Created	Date Last Modified
<input type="radio"/>	Test note	test	2/26/2014	2/26/2014

Pages: 1

Welcome to Learning Portal 2.0

My Profile

Check here to verify that your information is correct ... if anything is not correct, please contact us at training@us.endress.com

My Shortcuts

[My Profile](#)

Go

My Profile: My Profile

User Account: usendressadmin (Scott Richardson)

[My Profile](#)

[Login](#)

[My Supervisors](#)

[Roles and Permissions](#)

[Learning Transcript](#)

Personal Information

First Name: Scott

Last Name: Richardson

Email Address: Scott.Richardson@us.endress.com

Start Date: 8/9/1999

Alternate Company:

Company: SC-USA

Customer Number:

Department: HR

Job Title:

Learner Type: SC-USA EE-other

New Hire: (None)

Occasional User: No

Revision History:

[◀ Back](#)

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build: 5.201403-00166

Checking your profile information

My Profile: My Profile

User Account: scott.richardson@us.endress.com (Scott Richardson)

[My Profile](#) [Login](#) [My Supervisors](#) [Roles and Permissions](#) [Learning Transcript](#)

Edit the necessary fields below and click [Update](#) at the bottom of the page to save your changes.

* Required Field.

Personal Information

First Name: Scott

Last Name: Richardson

Email Address: scott.richardson@us.endress.com

Start Date: 12/17/2012

Alternate Company:

Company: SC-USA

Customer Number:

Department: Service

Job Title: Training Manager, Technical Sales

Learner Type: SC-USA EE-Sales/Marketing

New Hire: (None)

Occasional User: (None)

Revision History: 2/7 final upload

- Check to make sure your supervisor is correct

My Profile: My Supervisors

User Account: scott.richardson@us.endress.com (Scott Richardson)

[My Profile](#) [Login](#) [My Supervisors](#) [Roles and Permissions](#) [Learning Transcript](#)

Displaying records 1-1 of a total of 1.

Username	Last Name	First Name	Email Address
don.cummings@us.endress.com	Cummings	Don	don.cummings@us.endress.com

Pages: 1

For Supervisors

- Accessing your employee's learning records
- Assigning learning activities



Accessing your employee's learning records

- Click on the “Administration” tab
- Then select “Users” – you should see all of the people that report to you ... select one of their usernames to see more information ...

Learning Portal Home Administration Reporting

Users: User Table

Search for: Go [Advanced Search](#)

User Manager
User Manager Home
Users
Groups

Learning Activities
Approval Manager

Go

User Table Users By Group User By Role

To [Edit](#) or [Archive](#) a record, select the list item radio button, then select the appropriate button below the list.

Displaying records 1-3 of a total of 3. Results per Page: 10 Show

Select	Username	Last Name	First Name	Email Address	Status	Groups by Manual	Groups by Rule
<input type="radio"/>	drew.barss@de.endress.com	Barss	Drew	drew.barss@de.endress.com	Active	GUEST, SC-USA EE-Service/Engineering	SC-USA EEs, SC-USA EE-Service/Engineering, Technical Personnel
<input type="radio"/>	frontdesk	Desk	Front	scusa.frontdesk@us.endress.com	Active	SC-USA EE-other	SC-USA EE-other, SC-USA EEs
<input type="radio"/>	todd.lucey@us.endress.com	Lucey	Todd	todd.lucey@us.endress.com	Active	SC-USA Managers	SC-USA EE-other, SC-USA EEs

[Edit](#)

Welcome to Learning Portal 2.0

Accessing your employee's learning records

Select "Learning Transcript" to see an individual's learning records

[Profile](#) [Login](#) [Advanced](#) [Learning Transcript](#)

Edit the necessary fields below and click [Save] at the bottom of the page

* Required Field.

Personal Information

First Name: Todd
Last Name: Lucey
Email Address: todd.lucey@us.endress.com
Start Date: 7/28/2009

Alternate Company:
Company: SC-USA

Customer Number:
Department: General Management
Job Title: General Manager
Learner Type: SC-USA EE-other
New Hire: (None)

Occasional User: Yes
Revision History: Initial upload



Accessing your employee's learning records

For example:

Profile Login Advanced **Learning Transcript**

Search for: Go

Completed Between: # And: #

Displaying records 1-6 of a total of 6. Results per Page:

Course Name ▲	Class Name	Completion Status	Registration Date	Completion Date	Course CEU	Registration Status
Introduction to Opportunity Management (4 min)	Introduction to Opportunity Management (4 min)	Completed	7/2/2013 8:00:00 AM	7/2/2013 8:00:00 AM	0	Enrolled
Introduction to Standard 201 (4 min)	Introduction to Standard 201 (4 min)	Completed	7/2/2013 8:00:00 AM	7/2/2013 8:00:00 AM	0	Enrolled
Plant Asset Management [PAM] - an introduction (8 min)	Plant Asset Management [PAM] - an introduction (8 min)	Completed	7/2/2013 8:00:00 AM	7/2/2013 8:00:00 AM	0	Enrolled
Tank and Terminal Management Awareness (9 min)	Tank and Terminal Management Awareness (9 min)	Completed	7/2/2013 8:00:00 AM	7/2/2013 8:00:00 AM	0	Enrolled
The Integrity Selling Model, 'AID INC' (4 min)	The Integrity Selling Model, 'AID INC' (4 min)	Completed	7/2/2013 8:00:00 AM	7/2/2013 8:00:00 AM	0	Enrolled
Why Sell Solutions? (7min)	Why Sell Solutions? (7min)	Completed	7/2/2013 8:00:00 AM	7/2/2013 8:00:00 AM	0	Enrolled

Pages: 1

Assigning new learning activities to employees

- From the “Administration” tab
 - Select “Learning Activities” from the first column of items

The screenshot shows the 'Administration' tab selected in the top navigation bar. Below it, the 'User Manager Home' page is displayed. On the left sidebar, the 'Learning Activities' menu item is circled in red. The main content area features a 'User Manager' card with a description and a 'Users' link.

Learning Portal Home Administration Reporting

User Manager Home

User Manager
User Manager Home
Users
Groups
Learning Activities
Approval Manager

User Manager
Use the User Management tools create and manage the system.

Users
View and manage a list of users within the system with the ability to search by various criteria

Assigning new learning activities to employees

User Manager

Learning Activities

Control all aspects of learning-related activities with the Learning Activities Manager. You can create and assign learning plans and classes, assign courses to individuals or user groups, manage field tests, approve or deny waiver requests, and manage grades and course results.

Learning Plans
The Learning Plan Manager lets you create, edit and assign learning plans

Class Manager
Use the Class Manager to create and manage instructor-led classes and sessions - both live and virtual - as well as assign users, view and print rosters, manage waitlists, and mark attendance

Mass Assignment
Manually or automatically assign courses to individuals or user groups

Waiver Requests
View, edit, and approve or deny submitted waiver requests if given the permission

Approval Manager

Mass Assignment: All Courses

Search for:

This view shows only those courses to which users have been mass assigned. It is filtered to show all course types. To assign a required course, select a course from the list below, then click the appropriate button below the list.

Displaying records 1-1 of a total of 1. Results per Page

Select	Course Name	Course ID	Type	# Assigned
<input type="checkbox"/>	Tank Gauging [Masterclass] (60 min)	Tank Gauging	Online Course	1

Pages: 1

2) Now search for a particular course(s) ... click GO
3) you can put several courses in the "bucket" ...
4) then "Assign learners"

Assigning new learning activities to employees

- First: define a due date for the assignment, if applicable

Term Option

- Terms: No due date or recurrence
 Set due date or recurrence

Recurrence refers to an assignment which needs to be periodically renewed (e.g. annually)

- Next, assign the learner(s) ... the system will notify user by email of assignment once you confirm the assignment in next step.

Assign Learners Wizard

Assign Learners

Find Learners Step 1 of 2

[User Table](#) [Users By Group](#)

Select users to assign to these courses. Click [Next](#) to continue.

Search for: [Go](#) [Advanced Search](#)

Displaying records 1-2 of a total of 2. Results per Page: 10 [Show](#)

Select	Username	Last Name	First Name	Email Address	Status	Groups by Manual	Groups by Rule
<input checked="" type="checkbox"/>	drew.barss@de.endress.com	Barss	Drew	drew.barss@de.endress.com	Active	GUEST, SC-USA EE-Service/Engineering	SC-USA EEs, SC-USA EE-Service/Engineering, Technical Personnel
<input type="checkbox"/>	frontdesk	Desk	Front	scusa.frontdesk@us.endress.com	Active	SC-USA EE-other	SC-USA EE-other, SC-USA EEs

1 | All

Welcome to Learning Portal 2.0

Assigning a learning plan to an employee

Learning plans are collections of learning modules or training events

From “Learning Activities Home” page, select “Learning Plans”, then “Assign Learning Plan”

Learning Activities Home

Learning Activities

Control all aspects of learning-related activities with the Learning Activities Manager. You can create and assign learning plans and classes, assign courses to individuals or user groups, manage field tests, approve or deny waiver requests, and manage grades and course results.

Learning Plans

The Learning Plan Manager lets you create, edit and assign learning plans

Mass Assignment

Manually or automatically assign courses to individuals or user groups

Learning Plans: Plan Templates

Search for:

Go

Advanced Search

Assign Learning Plan

Plan Templates

Assigned Plans

Expired Assignments

This view shows all of the learning plan templates in the system. To **Assign Learners** a record, select the list item radio button.

Displaying 0 records.

Assign Learning Plan

For now, assign a “traditional learning plan” and select the appropriate learning plan in the next step of the wizard ...

What type of learning plan would you like to assign? —

- Assign traditional learning plan.
- Assign certification learning plan.
- Assign certification learning plan with recurrence.

Assign Learning Plan Wizard

Assign Learning Plan

Select Learning Plan

Search for and select a learning plan to which you want to assign users. To view the details of a course before

Search for: Go

Displaying records 1-10 of a total of 16.

Select	Plan Name ▲	Description
<input type="radio"/>	Customer Service Skills	In 2009, a Customer Service Skills training program was developed. It consisted of delivered to employees in Service and Inside Sales. With a clearly improved custom will consist of a combination of THIS online content and mentoring by their peers an KEYWORDS: telephone support exceeding expectations excellence rapport anger a
<input type="radio"/>	Financial Fundamentals	This learning plan contains 5 courses, being evaluated as to their applicability for s statements and balance sheets when pursuing complex projects. KW Opex, Capex,
<input type="radio"/>	Food and Beverage School Prerequisites	Online modules which should be completed prior to attending the Food and Bever
<input type="radio"/>	Franklin Covey Training - the Four Disciplines of Execution	We hear about "Four Disciplines" and "my4DX" ... what's it all about?

Then click “Next” at the bottom right of the list ... and select the appropriate users in your group in the next step

Assign Learning Plans

Assign Learning Plan Wizard

Assign Learning Plan

Set Due Date

Specify when this learning plan will be due for the selected user(s) and what reminders they will receive. Click **Next** to continue.

* Denotes the field is required and must be filled in.

* Date Rule:

One time assignments:

Plan due in days:

Plan due on: #

Enter date in format *M/d/yyyy*

Recurring assignments:

Plan due monthly by:

Plan due annually by:

Notifications:

Reminders (days): 2 7 30

Past Due Reminders (days): 2 7 30

Cancel

When is this learning plan due?

If you want to have the learning plan assigned periodically, set as a “recurring assignment” (rare)

You can set notifications/reminders or past due reminders here

Then confirm the assignment by clicking “SAVE” in the next step

Using iPad to access learning content

- New functionality added Sept 2014



Using iPad to Access Learning Modules – Safari Browser

Courses can be accessed in one of two ways

1. Using Safari on iPad

1. Log in to the Learning Portal as you normally would (<http://us.endress.com/learning>)
2. Many courses will work without having to use a different browser or additional app.
3. If you see a link to a URL under a course it is available to open in the “Articulate Mobile Player”
 - a) The “Articulate Mobile Player” (AMP) is available for free from the app store



- b) This option provides a better user experience and the ability to download and save courses for offline viewing (all new courses placed in the Learning Portal from now on will include this option)
 - c) To open a course using the app, select the link and it will automatically download or prompt you to download the app.
 - Note: Course progress is not yet tracked when using the AMP app – this option may be available in 2015
4. If unable to open a course, this means the course requires a Flash-enabled browser: See option 2.

Welcome to Learning Portal 2.0

Using iPad to Access Learning Modules – Safari Browser

Using Articulate Mobile Player (AMP)

The screenshot shows the Learning Portal 2.0 interface. At the top, there are tabs for 'OLT Activities' and 'Details', and a 'Drop Course' button. Below this, it displays course information: 'Progress: Not Attempted', 'Status: Enrolled', 'Required: No', and 'Subscription Term Expiration: N/A'. A note says: 'To launch a learning activity, click the activity name or select the activity and click the Launch button. To return to the previous page, click Close Record.' Below this is a table for 'OLT Lessons' with columns: Select, Activity Name, Score, Progress, Last Accessed, Time Taken, and Attempts. The first row is selected and has a 'Launch' button. Below that is a table for 'Course Activities' with columns: Select, Activity Name, Type, Score, Progress, Last Accessed, and Time Taken. The first row is selected and has a 'Launch' button.

Select this star to add course to favorites

Select when using a PC

Select to use AMP

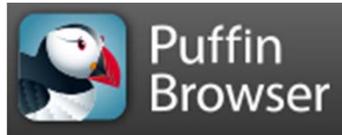
Toggle this switch to download course to iPad for offline viewing

The screenshot shows the Articulate Mobile Player (AMP) interface. It displays a grid of course cards. The central card is titled 'iPad2 - Solutions Development Webinar Series - Asset Information Management'. It features a play button icon, a star icon in a circle, and an 'Available Offline' toggle switch set to 'YES'. The card also shows 'About 32 minutes' and 'Version: 1.0.0.0 (August 2014)'.

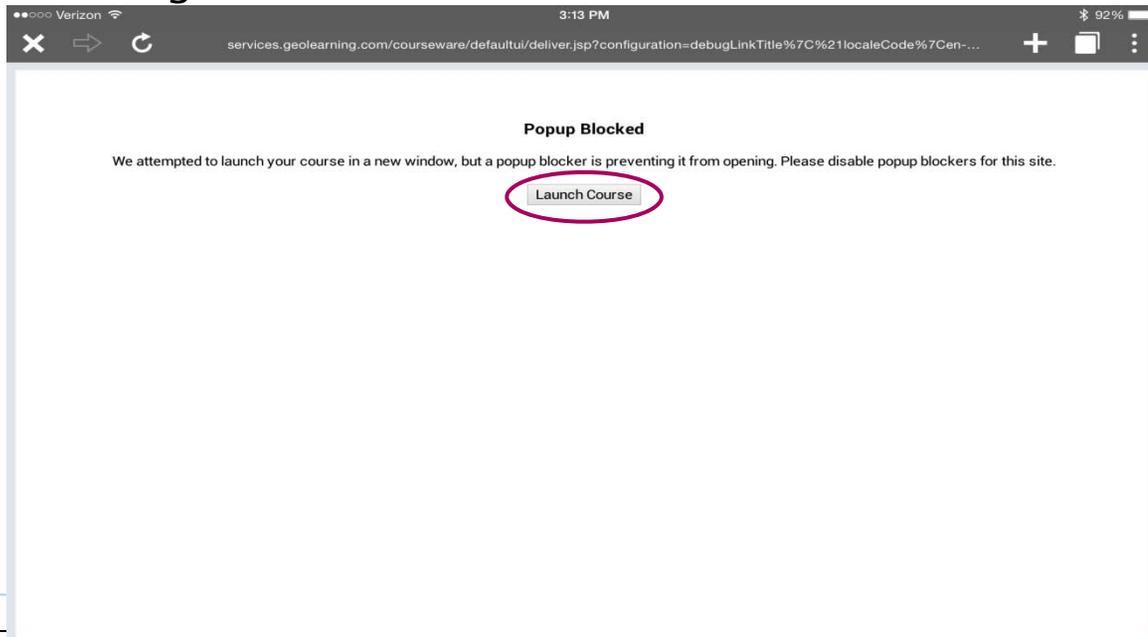
Welcome to Learning Portal 2.0

Using iPad to Access Learning Modules – Puffin Browser -- for modules requiring Flash Player

2. Download the free Puffin Browser to access courses requiring flash



- Access the Learning Portal the same way you would on a PC
- After clicking the course link select “Launch Course” on the next page



INTERNAL

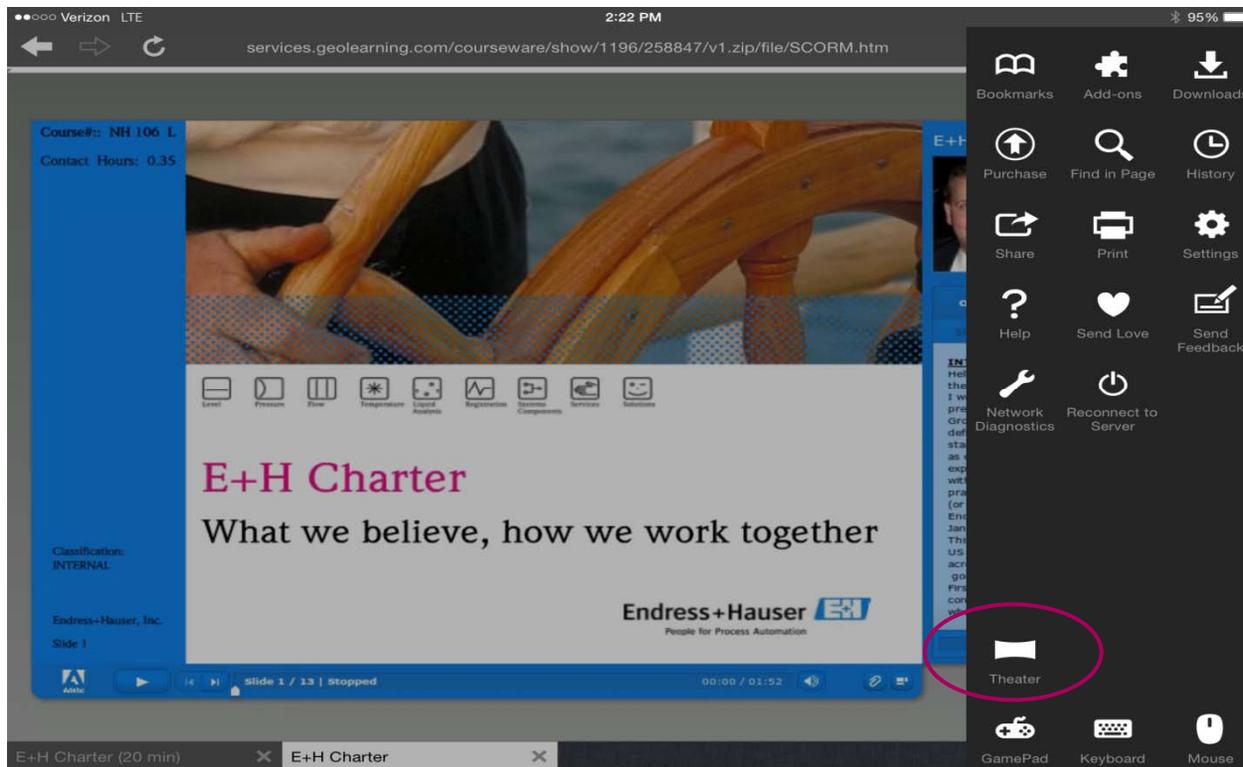
press+Hauser 

E+H Charter (20 min) x

Welcome to Learning Portal 2.0

Launching Module in Full Screen Mode

- From the left or right edge of the screen swipe toward the middle and select “Theater”
- To exit this mode follow the same steps above



Saving Knowledge Bank Items on iPad – Safari Browser

- Access to the Knowledge Bank is best accomplished using the Safari Browser, rather than Puffin
- To save Knowledge Bank items you will need Adobe Reader which can be downloaded from the app store 
- Access the Knowledge Bank the same way you would on a PC
- Select the item you want to open
 - It will open within your browser with the option to “Open in Adobe Reader” → This allows you to save directly to your iPad