

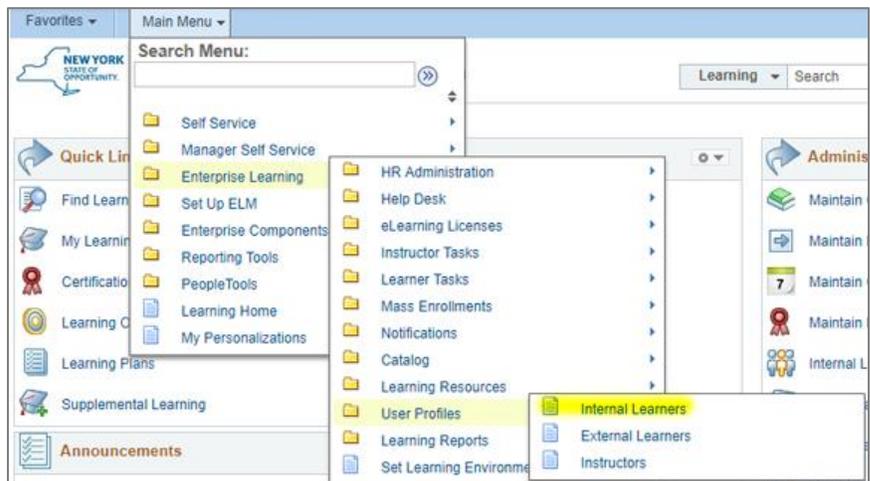
## Move a Learner History to a New Profile

As a result of moving from a contract employee to a New York State employee, a learner may have two profiles in SLMS that must be merged into one account. The first step in this process is to move the learner history from the profile that will be made Inactive to the target profile that will remain Active and serve as the learner’s account moving forward. This job aid covers the task of moving the learner history to a new profile.

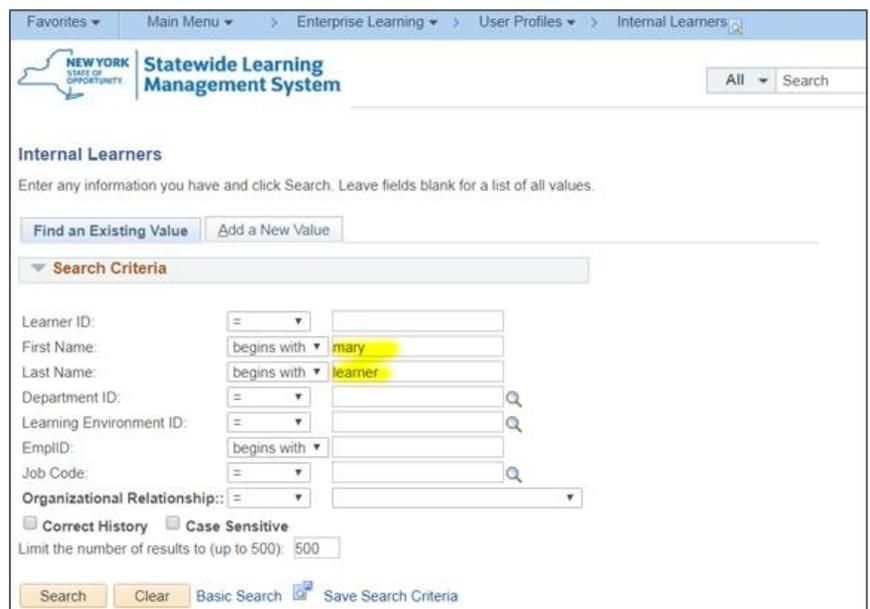
The administrator performing this task must have the following security roles in SLMS:

- Primary or Secondary Administrator
- Query Viewer
- HR Learner History Bulk Load

1. Click the **Main Menu** button.
2. Click the **Enterprise Learning** menu.
3. Click the **User Profiles** menu.
4. Click the **Internal Learners** link.



5. Enter the desired information in the **First Name** and **Last Name** fields.
6. Click the **Search** button.



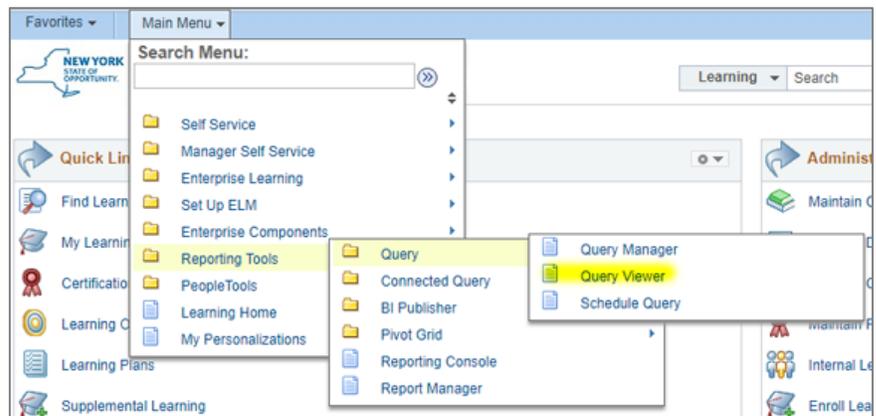
- Identify the two profiles to be merged in the **Search Results**.

Search Results							
View All							First 1-3 of 3 Last
Learner ID	First Name	Last Name	Department ID	Learning Environment ID	EmpID	Job Code	Organizational Relationship
1197364	Mary	Learner	1444	1015	C81793554	10349	Employee
1388729	Mary	Learner	1444	1015	N01234567	10349	Employee

In our example, the learner history will be moved from the first profile listed. Make note of the **Learner ID** for this profile.

The second profile listed is the target profile. It will remain Active and receive the learner history. Make note of the **EmpID**.

- Click the **Main Menu** button.
- Click the **Reporting Tools** menu.
- Click the **Query** menu.
- Click the **Query Viewer** link.



- Enter NY\_EMP\_TRANSCRIPT\_BU in the **Query Name** begins with search field.

Statewide Learning Management System

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By  begins with

- Click the **Search** button.

- In the Search Results, click on the **Excel** link for the Employee Transcript query.

Search Results							
*Folder View -- All Folders --							
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule
NY_EMP_TRANSCRIPT_BU	Employee Transcript	Public		HTML	Excel	XML	Schedule

15. The Employee Transcript query will open in a new browser window. Enter the Learner ID for the profile the learning history will be moved from. (See step 7.) Click on the **View Results** button.

Name	ID	Learner ID	First Name	Middle	Last	Job Title
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16. Save the resulting spreadsheet titled NY\_EMP\_TRANSCRIPT\_BU\_xxxx for further reference.

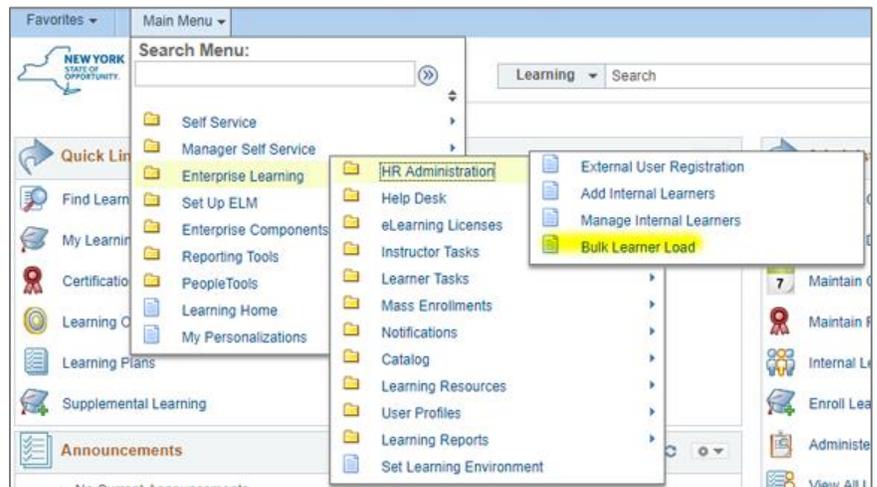
17. Close the Employee Transcript query window to return to SLMS.

18. Click the **Main Menu** button.

19. Click the **Enterprise Learning** menu.

20. Click the **HR Administrator** menu.

21. Click the **Bulk Learner Load** link.



22. Enter 8954 in the **Template ID** field.

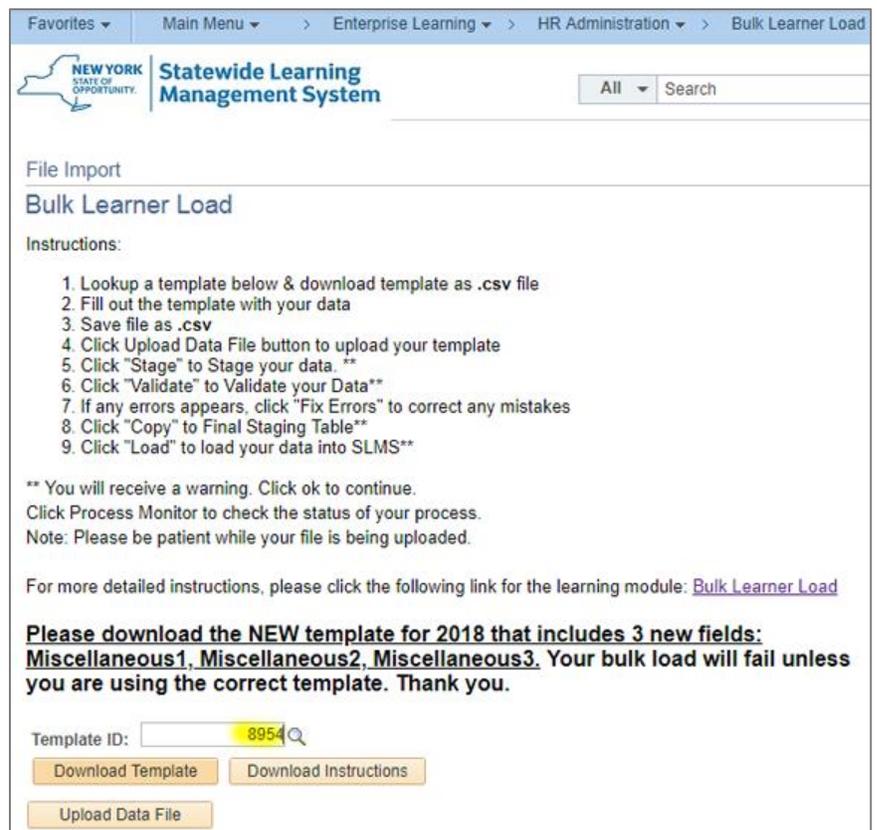
23. Click the **Download Template** button.

24. Open the resulting spreadsheet titled SLMS\_Learner\_History\_Template.

25. Open the NY\_EMP\_TRANSCRIPT\_BU\_xxxx spreadsheet. (See step 16.)

26. Click on the **Download Instructions** button.

27. Open the instructions document.



28. Cut and paste the required data from the query results into the required fields on the Learner History Template using the instructions document as a guide. Populate the Employee ID field of the template with the target profile EmplID number. (See step 7.)

Note required fields are marked with an asterisk (\*).

29. Save SLMS\_Learner\_History\_Template. Be sure to save this file in CSV format.

30. Upload the template to SLMS using the Bulk Upload function.

If the Learner History contains items that do not successfully upload to the new profile due to learning environment restrictions, complete a separate SLMS\_Learner\_History\_Template listing only the items which failed to load. Using the template as an attachment, open an incident ticket with the SLMS Help Desk requesting upload of the failed items.