Learning Center
How To Guide for Learners

Introduction:
The Learning Center is your one-stop portal for LPL Financial Learning & Development. The Learning Center allows easy enrollment and participation in many forms and types of learning and education topics. This guide will help you navigate and get the most from the Learning Center.

Look for these helpful icons:

- Alert or Important
- Information or Note
- Quick Tip

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Learning Center Landing Page

Use the Resource Center to access the Learning Center (enter these words in the Resource Center Search box if you do not immediately locate the link). This link will automatically log you in using Single Sign-On (SSO).

1. The Learning Center Landing Page is made up of several sections:
   a. The Browsing portlet allows you to browse the entire training catalog by topic or search by keywords.
   b. The Monthly Calendar link brings you to the full calendar of all scheduled training events for the firm, shown below.

   While the Calendar page initially shows the Month view for all scheduled events, you can also view by Day or Week. You can apply filters on the left-hand side to customize the types of events visible to you.

   To show only those events for which you have enrolled, select My Events.

   c. The My Learning portlet shows the list of your enrolled courses.
   d. The Completed Learning portlet shows the courses and curricula you have completed.

   Includes training you completed after 1/1/2015. Training prior to that date has been archived.

   e. The Popular Learning Events portlet shows the courses most commonly taken by others.
Required Training

1. The **Required Training** items are highlighted in red so that you can easily distinguish the **Required Regulatory Training** items from the optional training items.

Catalog Search

1. There are three ways to search the LMS using the **Catalog Search**.
   a. Search the LMS with specific keywords using the **Search** bar.
   b. Look through the entire catalog by the **Browse** button.
   c. Browse the catalog by topic.

2. The **Browse** page has three areas.
   a. The left column includes filters that will limit the search.
   b. **New Learning** shows new courses available.
   c. **Popular Learning** shows courses most commonly taken by other users.

Registration

In order to complete or participate in a learning course, you must first complete the **Enrollment** or **Launch** process.

1. From **Catalog Search** results, if the course is delivered as an online learning, then click the **Launch** button. The course will automatically begin in a new window.
2. From the Catalog Search results, if the course is an instructor-led or virtual classroom:
   a. Click the View Classes button to view the classes for that course.

   b. Click the Enroll button.

3. To register for a curriculum, click the Register button.

4. You’ll be able to view the details of the curriculum on the next screen. Verify the details, then click the Complete Registration button.
Add Learning

Rather than prescribe learning plans, we have enabled you to create your own. This gives you the flexibility to choose the volume and pace.

Required or mandatory regulatory training will continue to be assigned to you.

1. To add a learning event to your plan, click the ME tab from the landing page.

2. Click Actions.

3. Select Add Learning.

4. The Assign Learning window displays.
   a. Click the magnifying glass to search the catalog.
   b. When the results appear, click Select next to the item(s) which you’d like to add.

   c. Your selected learning event(s) appear in the Selected Learning section on the right-hand side. Once you’ve made your selections, click Add to Plan.

Cancellation

1. To cancel an enrollment, click the Drop button from the View Summary drop-down menu.

2. A pop-up window will display, asking you to confirm that you want to cancel. Click Yes.

For system questions or technical support, please contact Tech Support by email techsupport@lpl.com or phone (858) 450-9606 ext. 6357.