PeopleFluent

Recruit, Develop, Perform, Reward

NetDimensions LMS 14.1

User Administration

An overview of the features and procedures relevant to User Administration in PeopleFluent Learning's NetDimensions LMS Version 14.1

www.peoplefluent.com/products/learning

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User Manager

With the User Manager, Administrators can:

- Create or change user profiles
- Edit or review role access control settings
- Maintain User Roles
- Maintain user attributes
- Migrate data records from one user ID to another
- Access the (csv) data loader

From here you can access:

- User Editor functions to search for users, change organizations or create new users
- Role Access Control to review or update access permissions for individual roles
- Role List Configuration to maintain roles
- User Attribute Configuration to configure job codes and classes
- User ID migration to move a user's records from one User ID to another
- Access the (csv) Data Loader

Setting User Accounts

Setting-up Users

In setting up users, an administrator should:

- Define the relevant organization structure. (Refer to the chapter on Organization Management)
- Define user profiles.
- Define user's accounts.

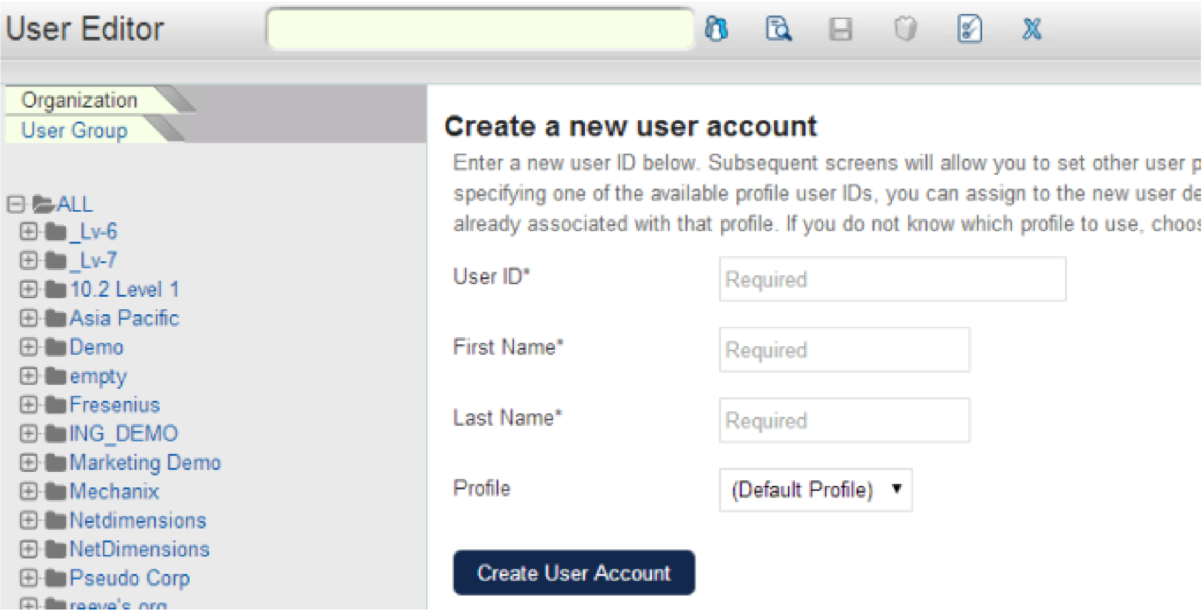
Create a New User or User Profile

To create a new user or user profile:

1.Go to **Manage Center** > **USERS** > **USER MANAGER** > **Users**, then click **+ Create Users**.

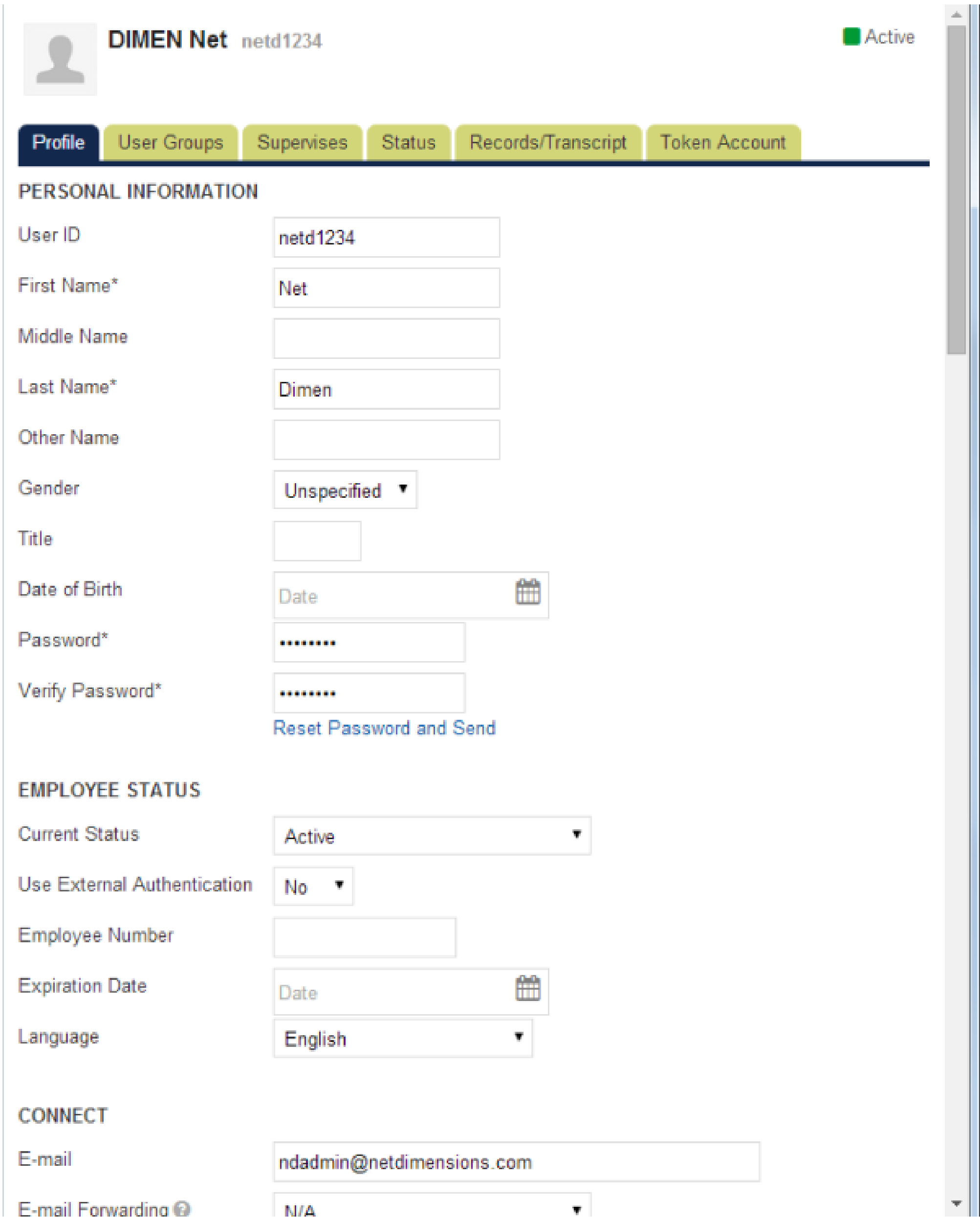
2.This opens the *User Editor* screen on a separate window.

3.On the *Create a New User Account* page.

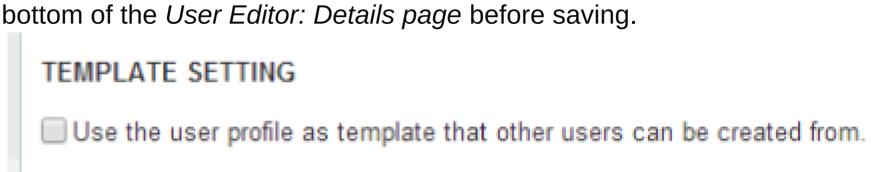


- Enter the **User ID**, First and Last Name, and **Password** and select the relevant profile.
- Click **Create User Account.**

4.The *User Editor Details* page will appear. From here enter relevant user details.



Note: To create a user profile, you need to click the checkbox next to the "**This user is a profile**" at the bottom of the *User Editor: Details page* before saving.



From the *User Editor: Environment* page, an administrator can enter a user's contact information including:

- First page the user accesses (First screen)
- Time zone
- Language
- Skin applied
- Relevant content server

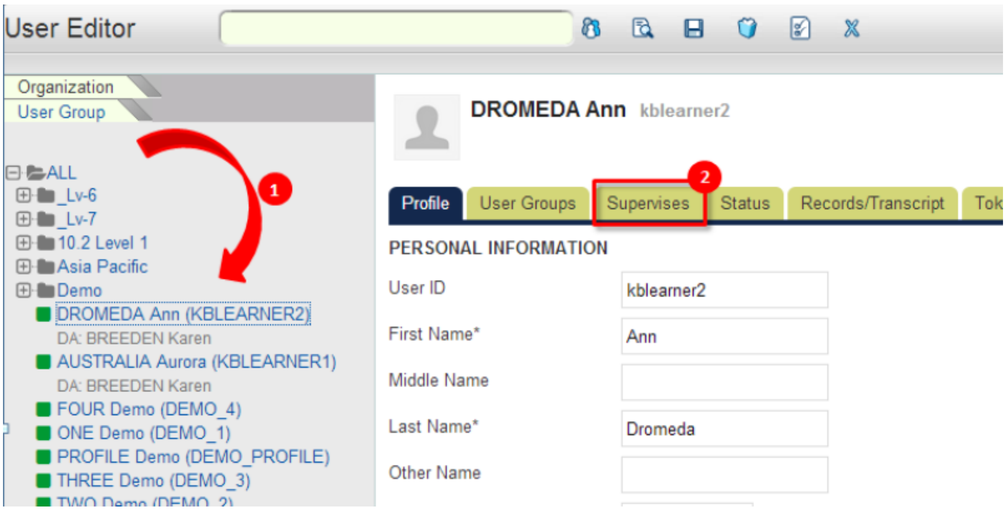
As well as the catalogs this user has access to or whether competency management applies. To amend these details see **Change User Environment** section on the succeeding page.

Define Supervision Rights

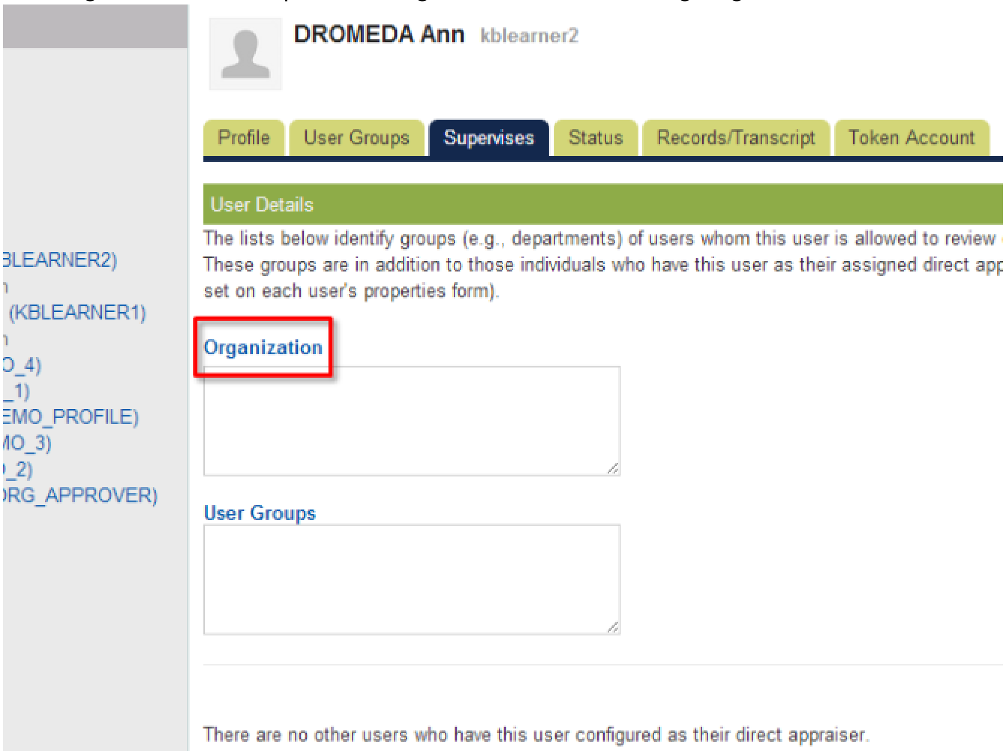
An Administrator can define whom (or what) a user supervises in the *User Editor: Supervises* page. To amend these details:

1.Select the user to whom the supervisor rights will be given.

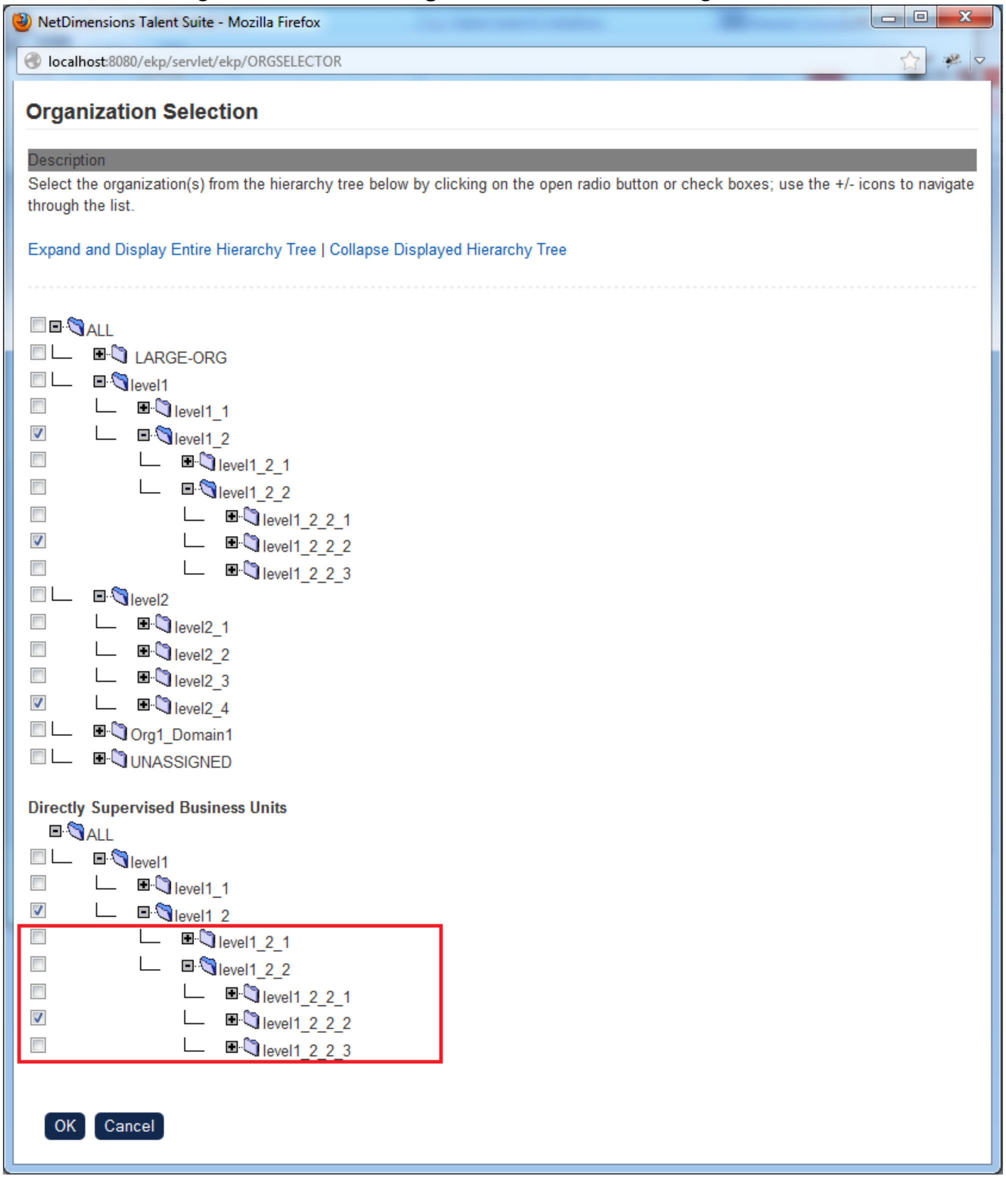
2.Click the **Supervises** tab.



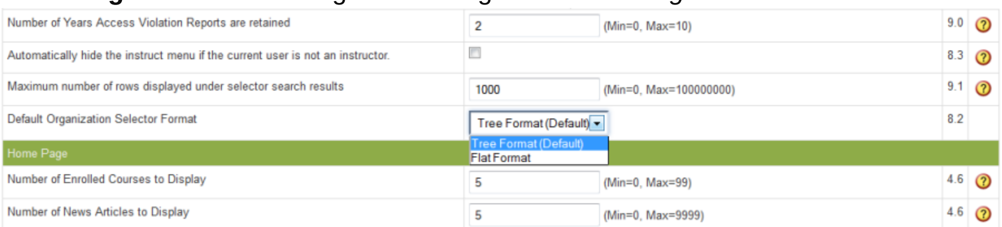
3.The *User Editor: Review/ Appraisal List* page appears. On this page, you can select the organization or user group whom the user you selected will be allowed to review or appraise. Managers can further expand those organizations in order to select their child organizations. A logged in user can select the child organizations of supervised organizations when using Organization Selector.



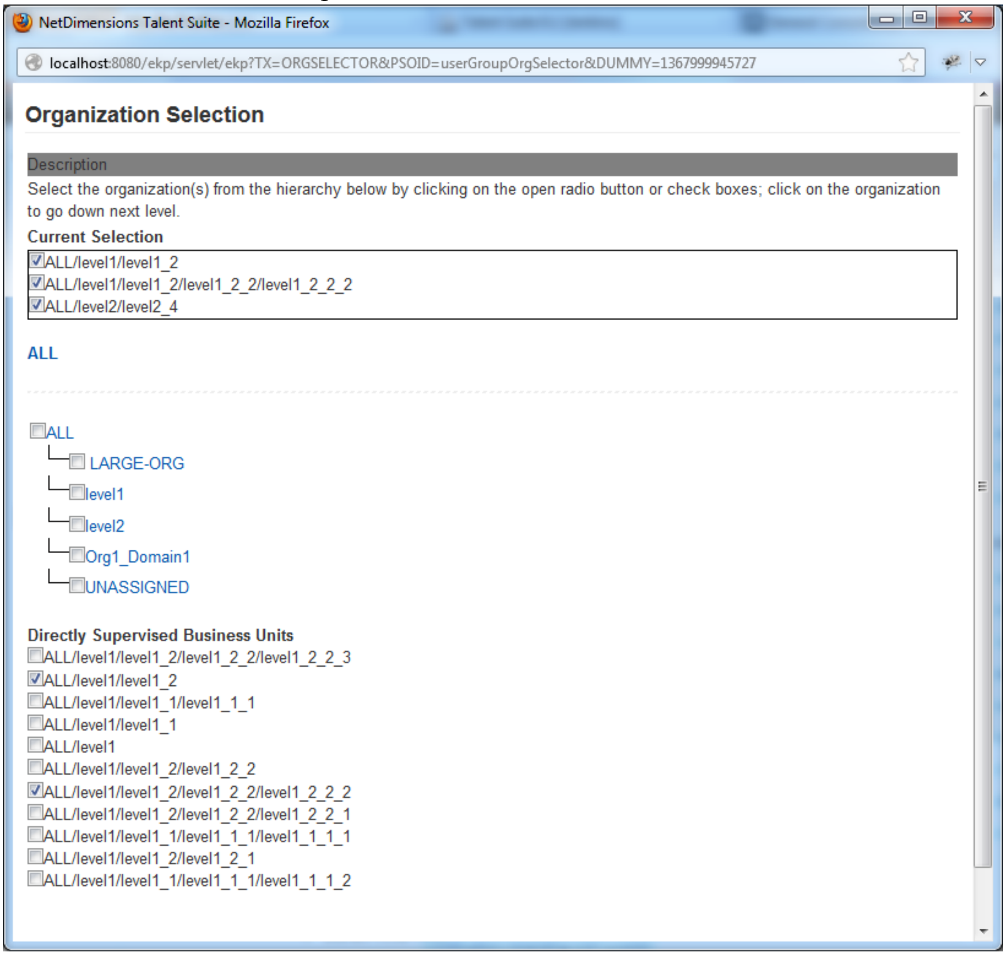
4.To select an organization, click **Organization** link. The *Organization Selection* screen appears.



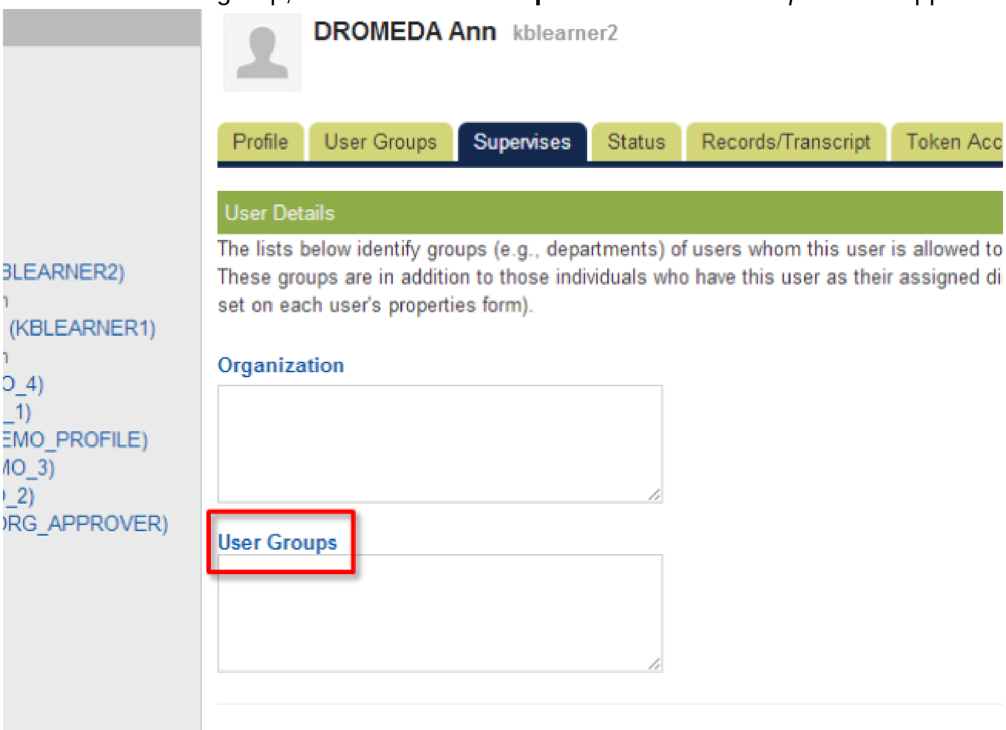
5.The change applies to both Tree mode and Flat mode. To switch between the two modes, go to **Syst em Configuration** and change the setting for *"Default Organization Selector Format"*.

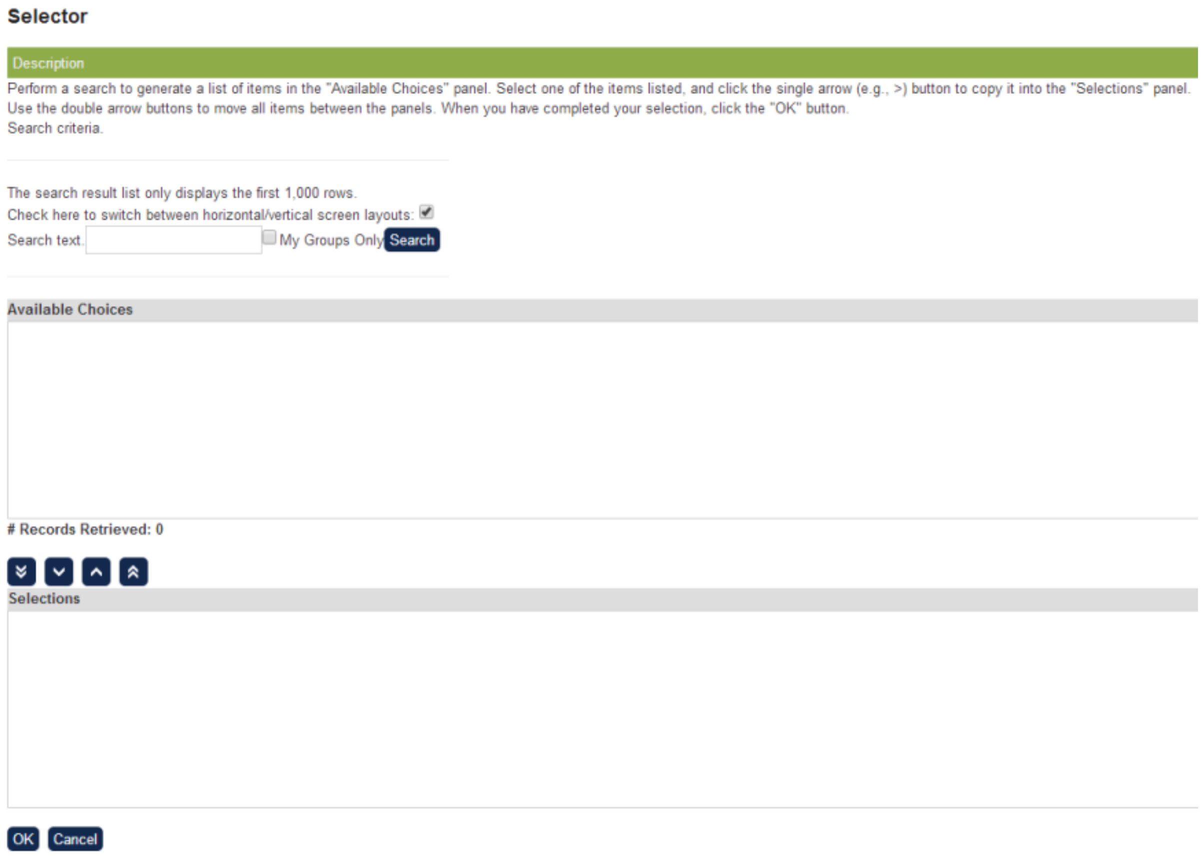


6.The screen shows the Organization Selector - Flat mode.



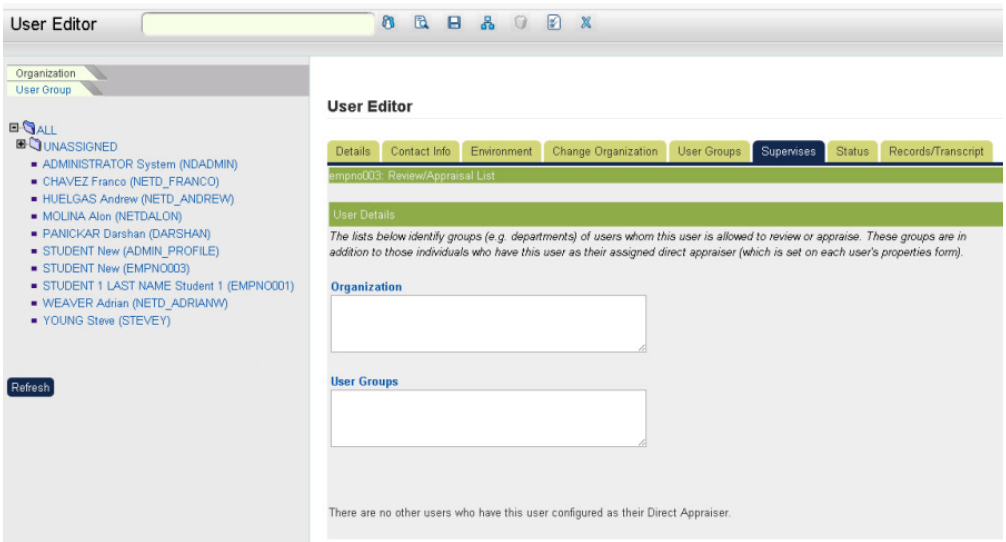
7.To select a user group, click the **User Group** link. The *User Group* screen appears.





Setting up a User's Account

An Administrator sets up a user's account by navigating into the *User Editor* screen and selecting the user's name



From this page, you can set-up the following:

- Details
- Contact Information
- Environment
- Change Organization
- User Groups
- Supervises

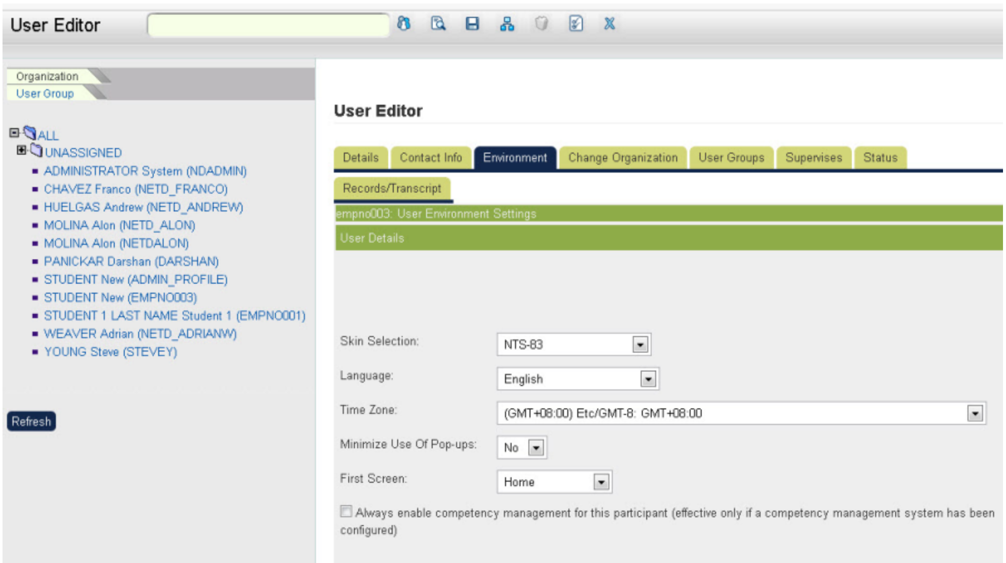
- Status
- Records/Transcripts

Details will be discussed on the succeeding sections.

Change User Environment

The Administrator can specify or change the following:

- Skin - defines the look of the Talent Suite for this user
- Language
- Time zone
- Starting screen
- Operation of competency management (this is effective only if a competency management system has been configured)



Note: The user may also change some of this information. The Talent Suite will retain the most recent settings depending on who changed these last.

Creating User Accounts via URL

This features allows an organization to integrate Talent Suite with an existing Intranet or portal site, allowing users registered to the existing site to enter the Talent Suite without a separate logon.

This is accomplished by passing the user's account information to the Talent Suite in a query string of a hyperlink from the existing site. When this URL is accessed, Talent Suite checks whether the user has an existing account within the application. If no prior account exists, the Talent Suite will create a new account and log the user in automatically.

The user should then see a the Talent Suite Home page.

This feature is handy for organizations that want to grant new users access to training programs without having to first creating the requisite user IDs and logons.

Configuration

To configure this URL logon capability:

- First, configure a generic user profile in Talent Suite
- Once you have done so, you will be able to use hyperlinks in the format shown below to automatically log users on to the Talent Suite and create new accounts as required. (Note that the items in <> brackets indicate where relevant data values should be passed within the URL.)

```
http://www.yoursitename.com/ekp/servlet/ekp/SETCREATE?UID=<user ID>&PWD=<pas
sword>&FNAME<family name>=&GNAME=<given name>[&level1ID=<level 1
ID>[&level2ID=<level 2 ID> [&level3ID=<level 3 ID> [&level4ID=<level 4 ID>
[&level5ID=<level 5 ID>]]]]][&costCenter=<cost
center>][&attribute1=<attribute 1>][&attribute2=<attribute
2>][&attribute3=<attribute 3>][&attribute4=<attribute
4>][&prototypeID=<profile ID>]
```

This part will change with each site setup: http://www.yoursitename.com/ekp

<u>Example</u>

You may use the following example for reference. Note that this example creates a new user account using the profile called ‘ge profile’ as a template, substitutes a user ID of “NEWUSERXY”, a password of “123456”, a family name of “Family Name” a given name of “Given Name”, etc.

```
http://ekp63.netdimensions.com/ekp/servlet/ekp/SETCREATE?UID=NEWUSERXY&PWD=1
23456&FNAME=Family%20Name&GNAME=Given%20Name&costCenter=C1234&attribute2=Use
rattribute&prototypeID=ge_profile
```

Personalization by the User

After the Administrator has set up the User's Talent Suite profile, the User can personalize it through the User Profile page:

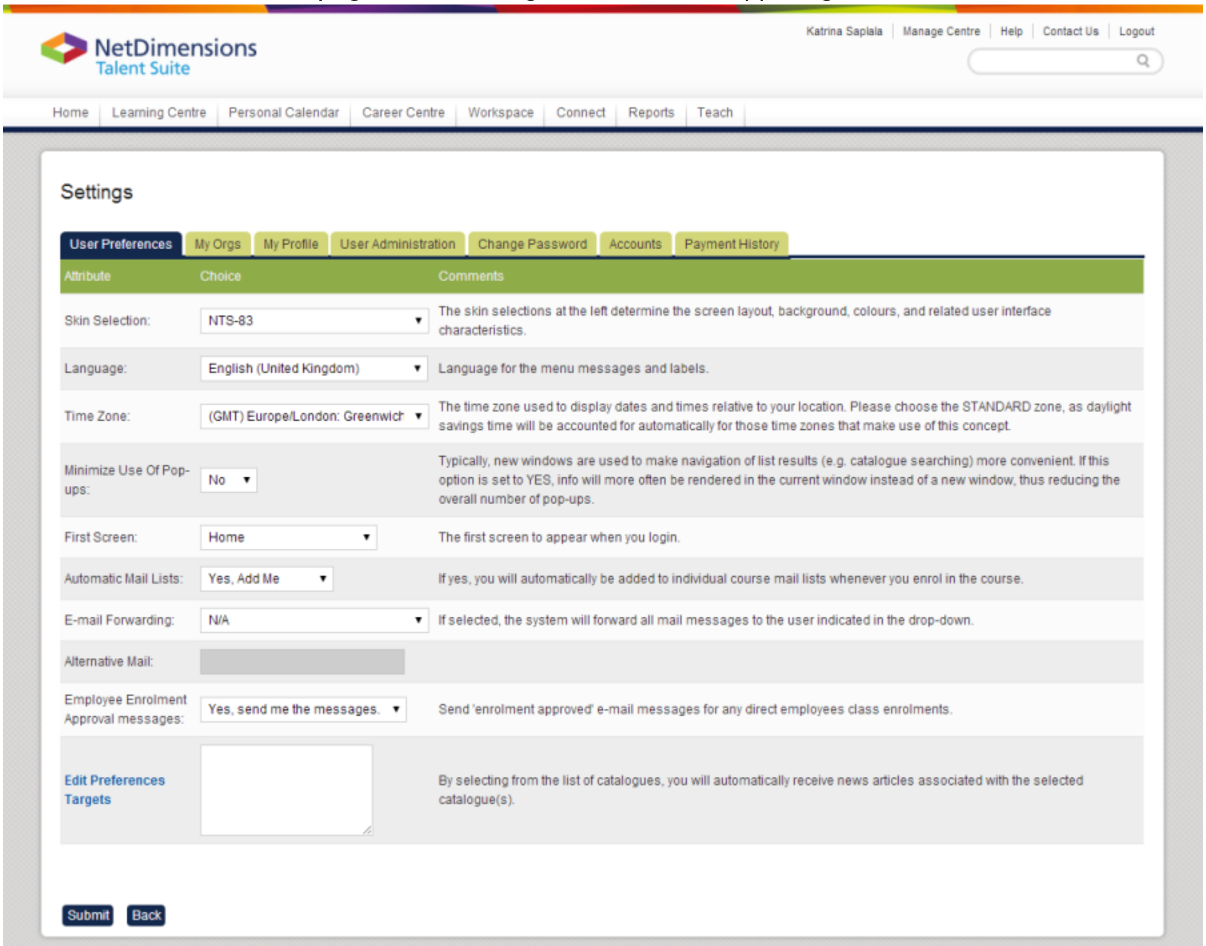
- Selecting preferred skin, email, starting screen, language
- Adding a profile picture
- Updating and/or restricting access to details
- Changing the password

Administrators may also review account details from this page.

Note: To do this the user must have access to the user profile hyperlink. Whether the user has such access rights will depend, among other things, on the skin the administrator has initially selected.

Access to the User Profile Page

To access the *User Profile* page, click the *Login Name* on the upper right corner.



Personalization by the System Administrator

User Records

An Administrator can specify or update a comprehensive set of User details, including:

- Basic information, such as the user's:
  - Name
  - Gender
  - Status and term of validity (i.e. when (valid) status expires)
  - Account information
  - Expiration
  - Password
  - Role
  - Birth date
  - Contact details

Note: This is specified in a different section (Contact Info) from other contact details

- E-mail

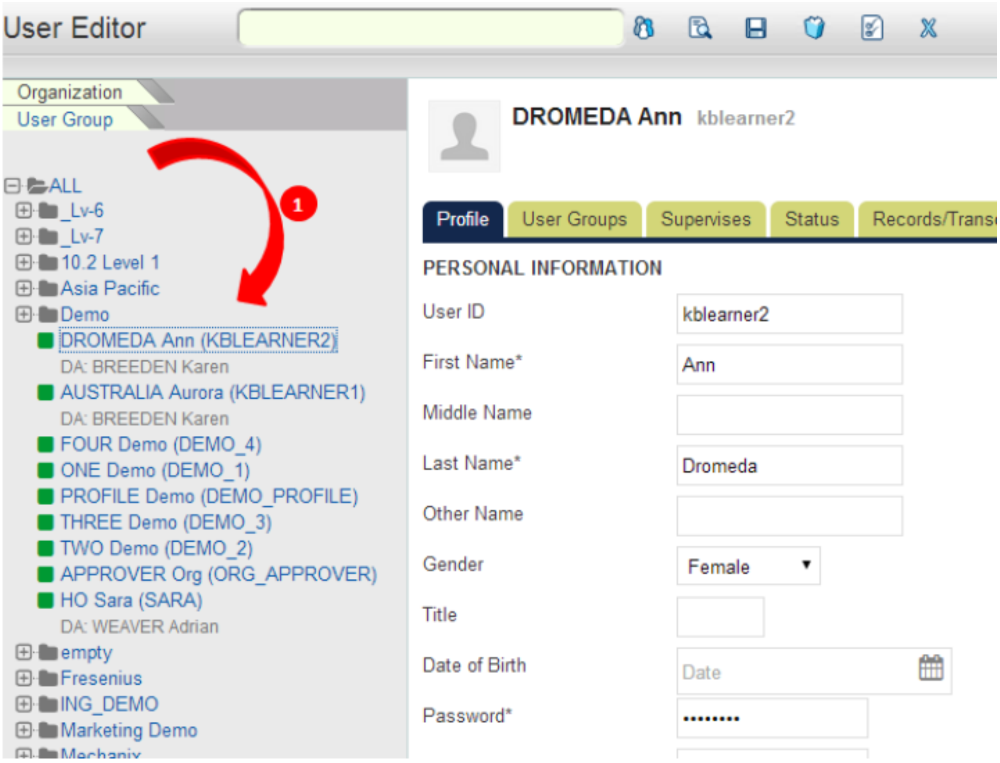
Note: This is specified in a different section (Details) from other contact details

- Organization
- Supervised users and organizations
- Manager, appraise and Human Resources (HR) manager
- The skin, email, starting screen, language
- Whether external authentication is required
- Who the user supervises

To locate, review and/or update users or update organizations, access the User Editor.

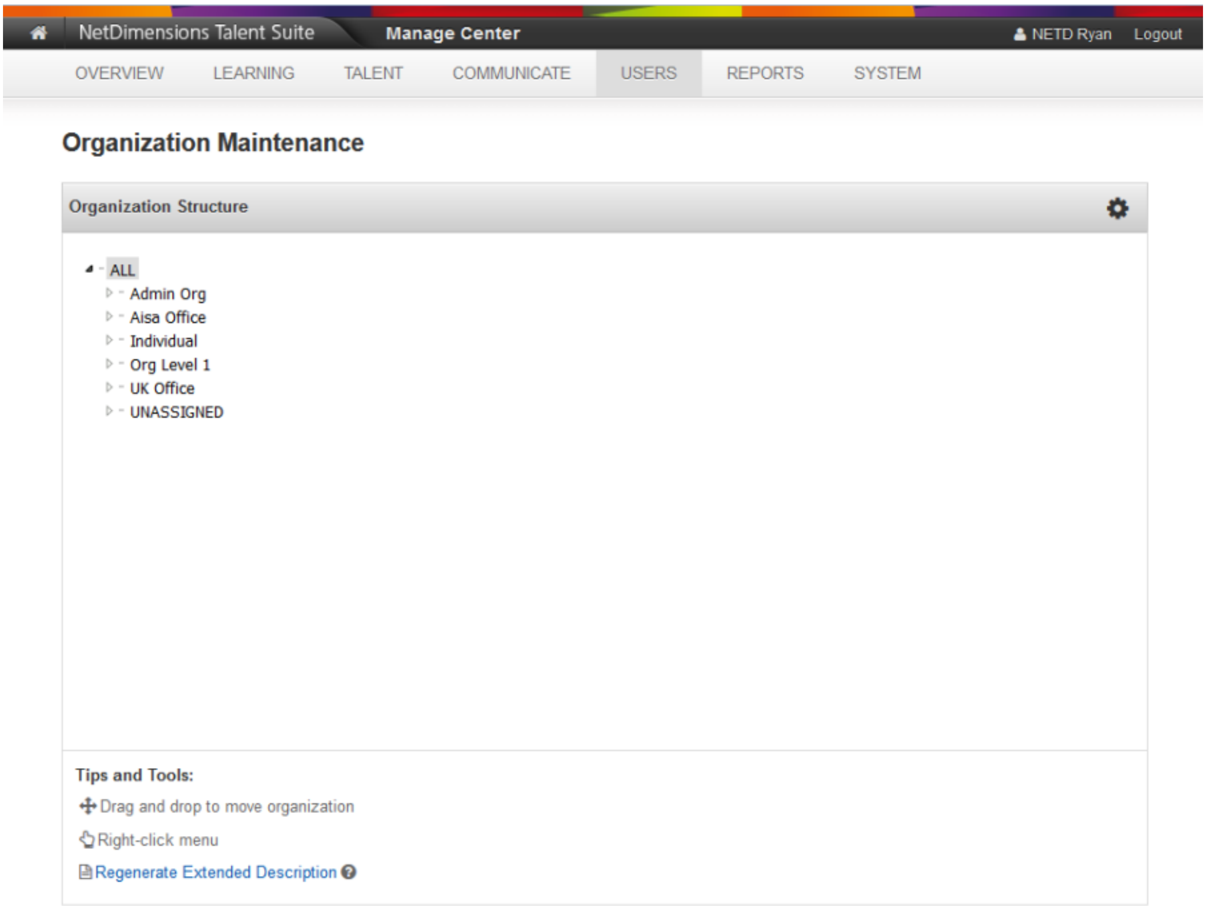
Accessing User Records

From the *User Editor* screen, select the user whom you want to access.

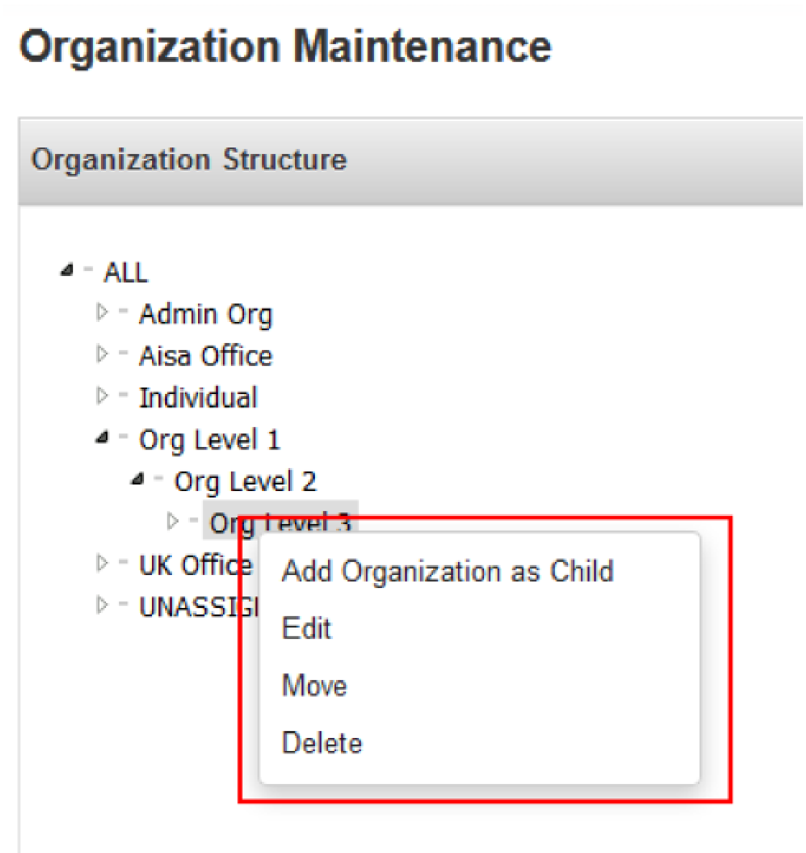

User Editor
Organization
User Group
ALL
_Lv-6
_Lv-7
10.2 Level 1
Asia Pacific
Demo
DROMEDA Ann (KBLEARNER2)
DA: BREEDEN Karen
AUSTRALIA Aurora (KBLEARNER1)
DA: BREEDEN Karen
FOUR Demo (DEMO_4)
ONE Demo (DEMO_1)
PROFILE Demo (DEMO_PROFILE)
THREE Demo (DEMO_3)
TWO Demo (DEMO_2)
APPROVER Org (ORG_APPROVER)
HO Sara (SARA)
DA: WEAVER Adrian
empty
Fresenius
ING_DEMO
Marketing Demo
1
DROMEDA Ann kblearner2
Profile
User Groups
Supervises
Status
PERSONAL INFORMATION
User ID
kblearner2
First Name*
Ann
Middle Name
Last Name*
Dromeda
Other Name
Gender
Female
Title
Date of Birth
Date
Password*

Organization Maintenance

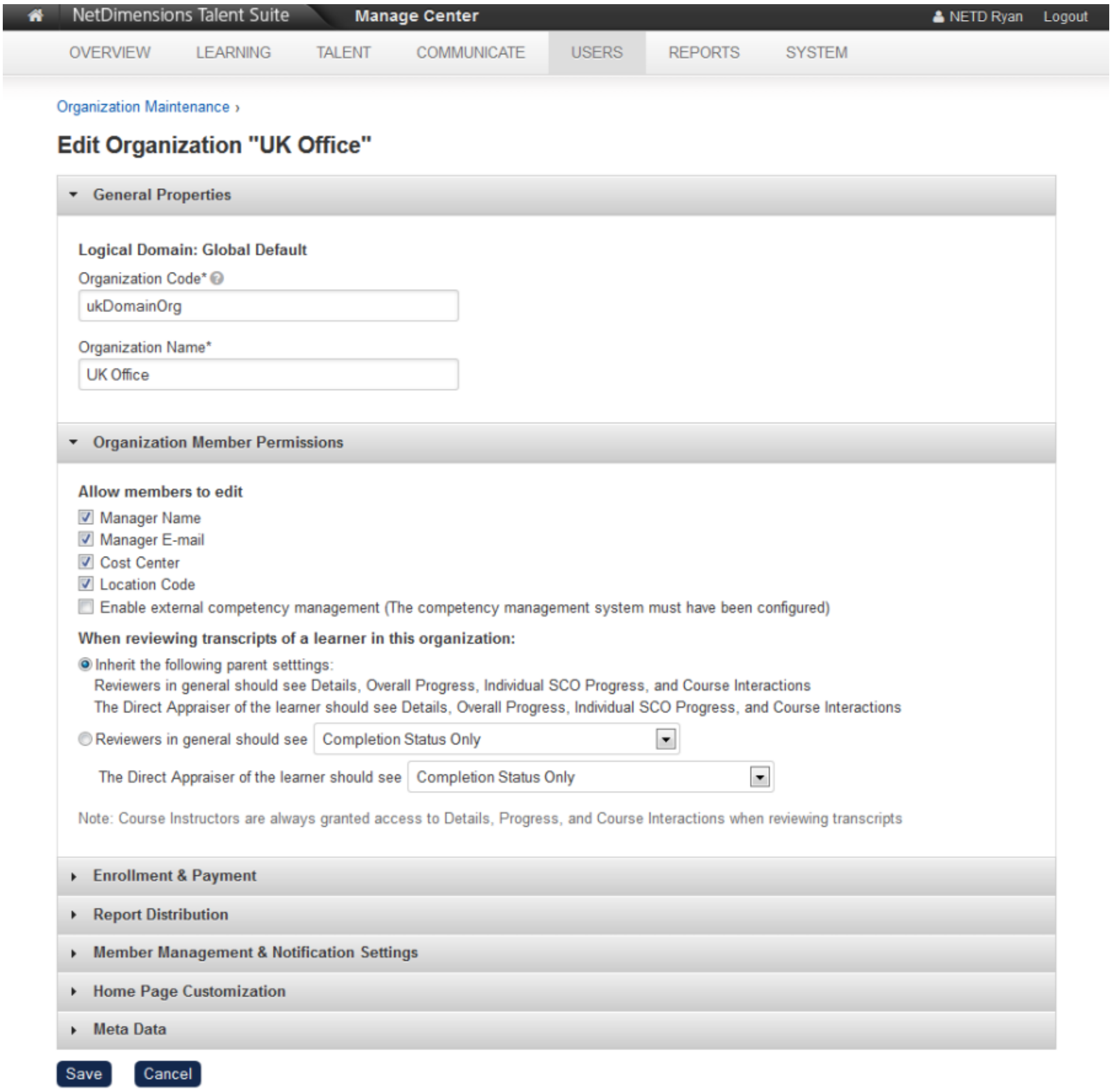
"Organisation Maintenance" is available under "Manage Center -> Users -> Group and Organisation":



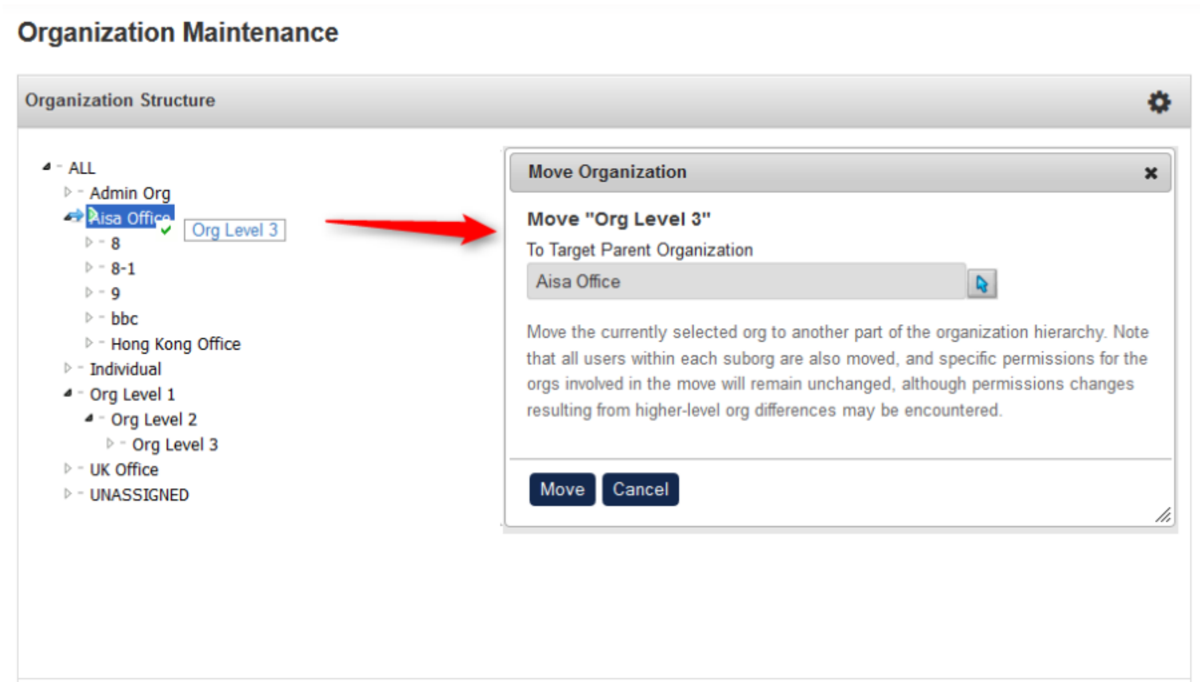
Organisation hierarchy is displayed as a tree.



Context menu of the organisation node. User can perform Add, Edit, Move and Delete actions.



Add or Edit an organisation



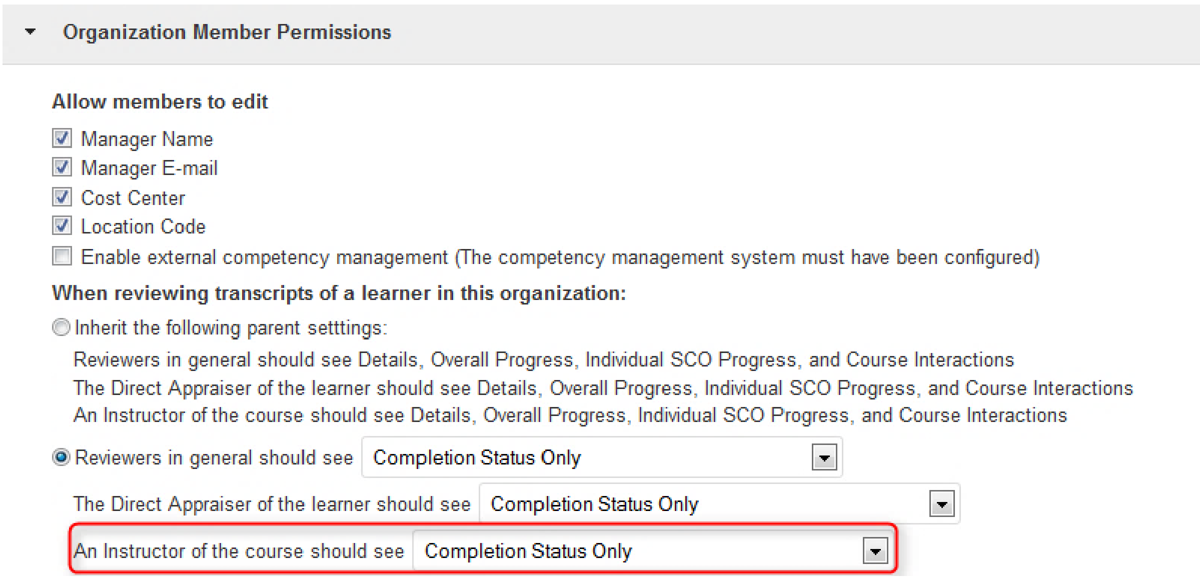
Drag and drop is supported for moving organisations. After selecting a target organisation, a confirm dialog will prompt the user to confirm.

Transcript Detail Control

(applies to NetDimensions Talent Suite)

Instructors are usually able to see full transcript details, however in some highly regulated countries, even Instructors arent allowed to have access to transcript details like question responses and scores. In cases like this, the Talent Suite has a feature to control the level of transcript details Instructors can view, which is configurable at the organization level. This setting complements the other two options that applies to the direct appraiser or to reviewers in general.

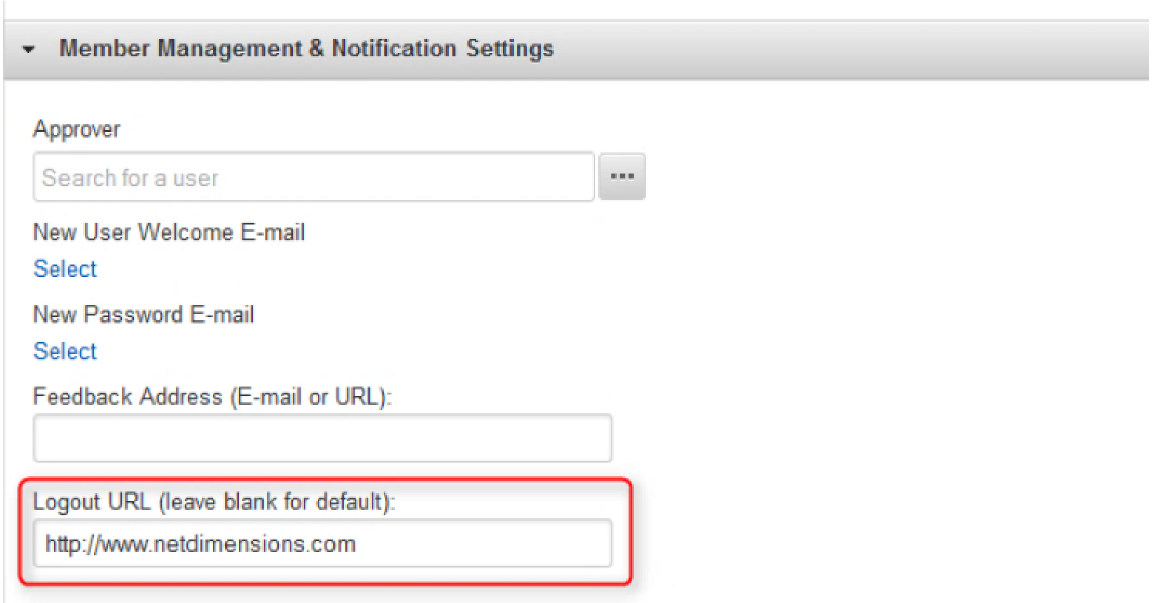
Note: When the reviewer is both an Instructor of the course and the Direct Appraiser of the Learner, whichever is the greater level of visibility will be granted to the reviewer.



Third option controlling transcript detail review for instructors

Logout URL at Organization Level

Different organizations can access the Talent Suite from different login pages. Users of certain organizations can be brought to a particular login page when they log out.



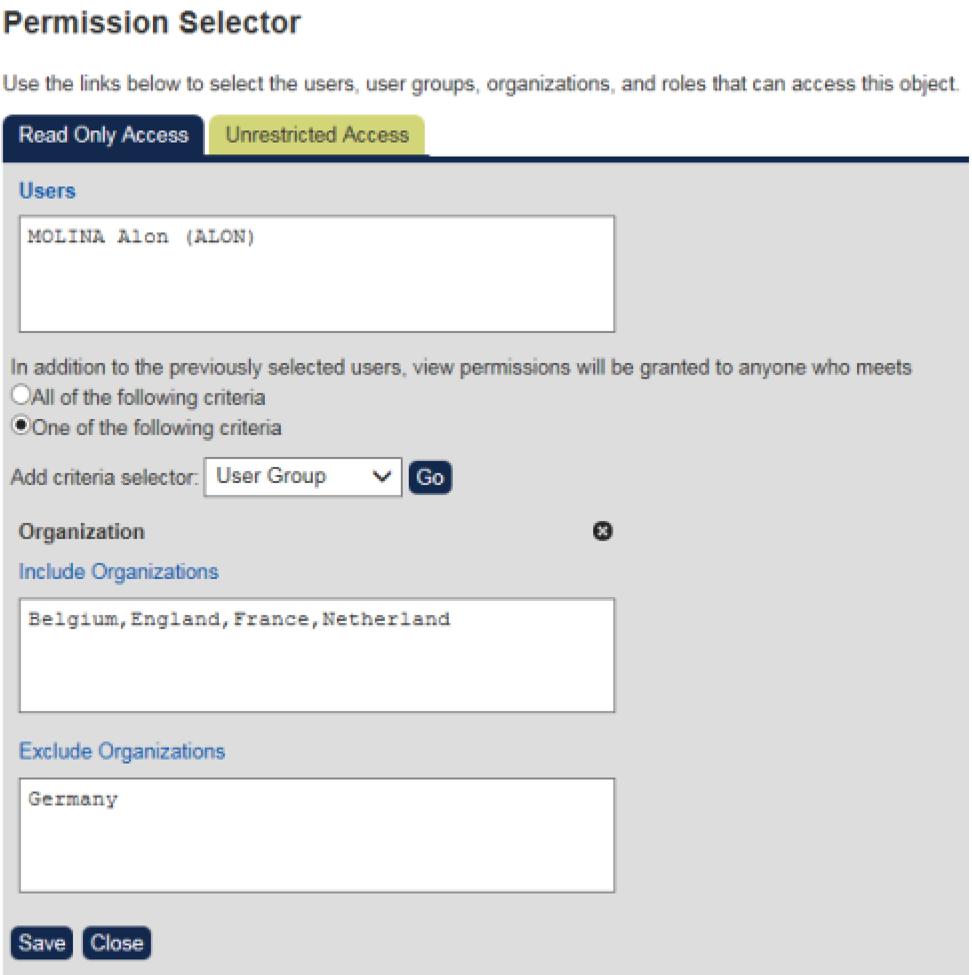
In Organisation Editor, you can now configure the logout url for an organisation. If not configured, the default will follow parent organisation's setting.

Note: Previously, the same setting was available in the Logical Domain Editor. It has been moved to the Organization Editor.

Ability to Grant Permissions to an Organization Excluding Child Organizations

When setting permissions using the **Permission Selector**, the system has the option to exclude child organizations. For example, using the following permission selector, one could grant permission to:

- Everyone in "Europe" except "Germany", which is in the "Exclude" list.
- "HQ (Europe)", which though it is under the excluded organization "Germany", has been explicitly added to the "Include" list. Other organization units under Germany that have not been explicitly included in the "Include" list would not be granted permission.

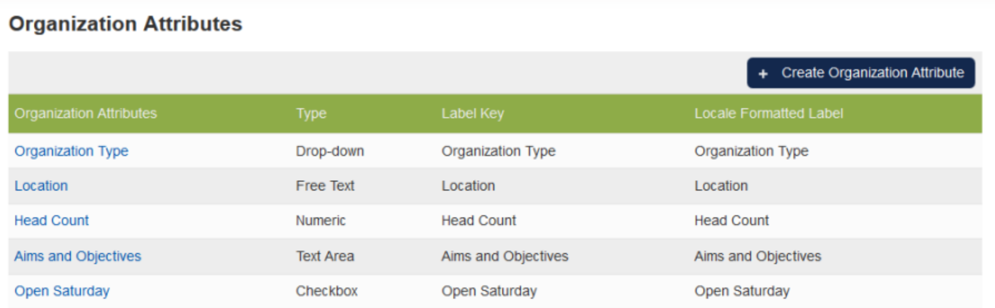


Note that an organization can be added either in "Include" or "Exclude" list, but not both at the same time.

Defining Organization Attributes

Organization Attributes can be defined at **Manager Center** > **Users** > **Group and Organization** > **Org anization Attributes**. Similar to Module Attribute, there are five types of attributes available:

- drop-down
- free text
- numeric
- text area
- checkbox


Organization Attributes

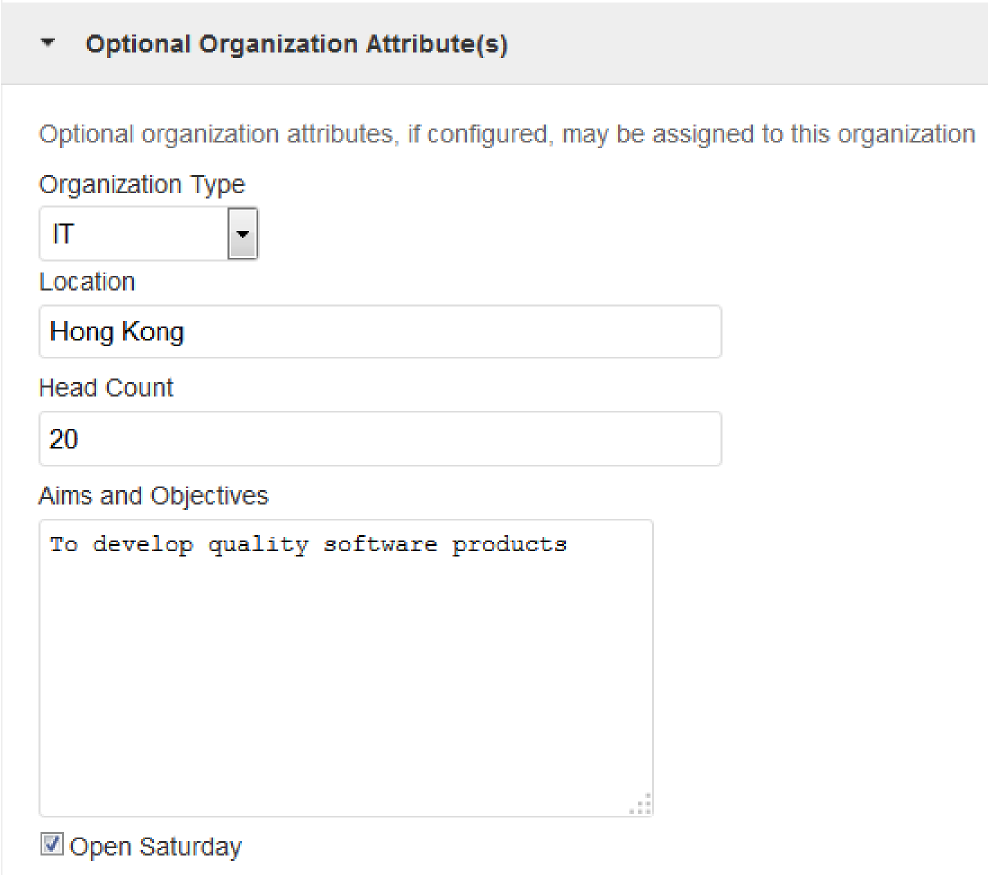
+ Create Organization Attribute

Organization Attributes	Type	Label Key	Locale Formatted Label
Organization Type	Drop-down	Organization Type	Organization Type
Location	Free Text	Location	Location
Head Count	Numeric	Head Count	Head Count
Aims and Objectives	Text Area	Aims and Objectives	Aims and Objectives
Open Saturday	Checkbox	Open Saturday	Open Saturday

Sample Organization Attributes

Assigning Attribute Values to Organizations

An organization may be assigned with specific attribute values via **Manager Center** > **Users** > **Group and Organization** > **Organization Maintenance.**



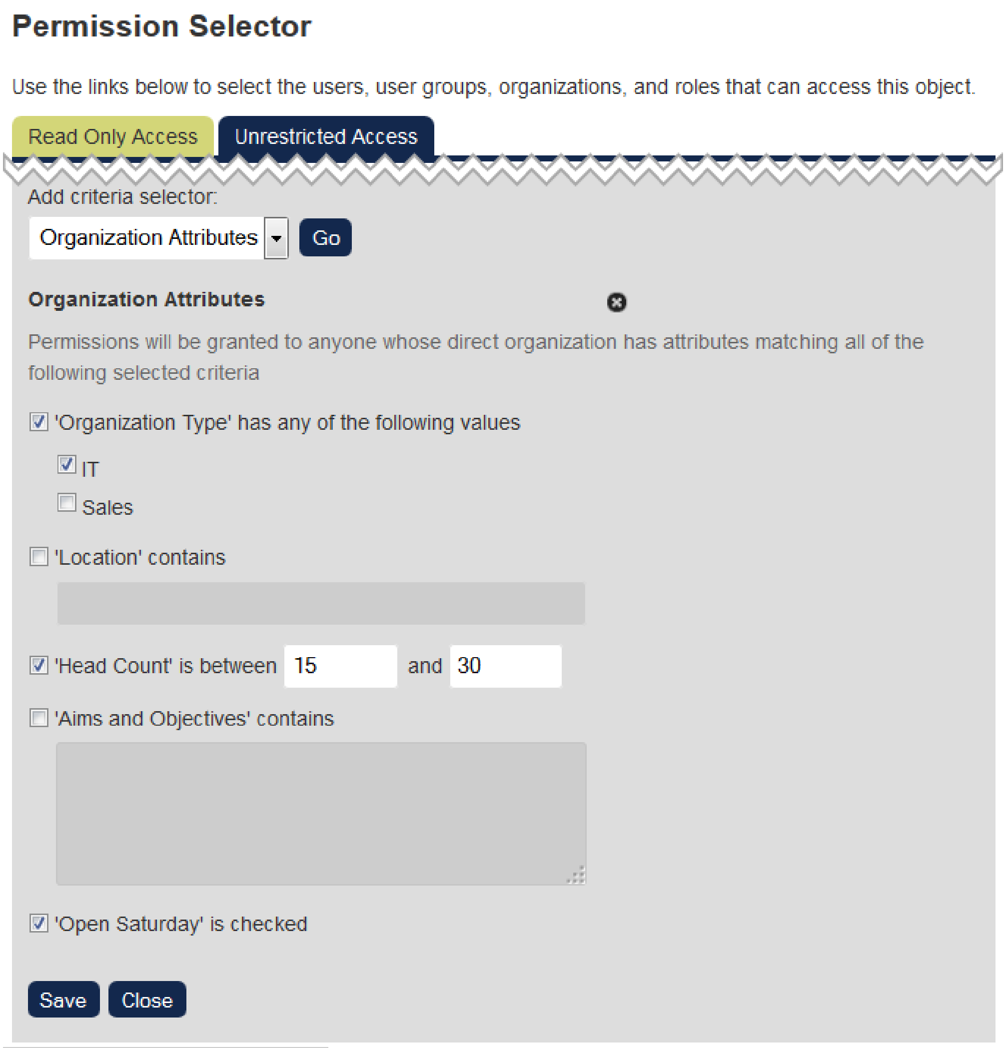
Sample Organization Attribute Values assigned to an Organization

Organization Attribute Criteria for Permission/Targeting

Administrators may select users based on organization attributes for:

- Permission Setup
- Auto-enroll
- Job Profile auto-assign

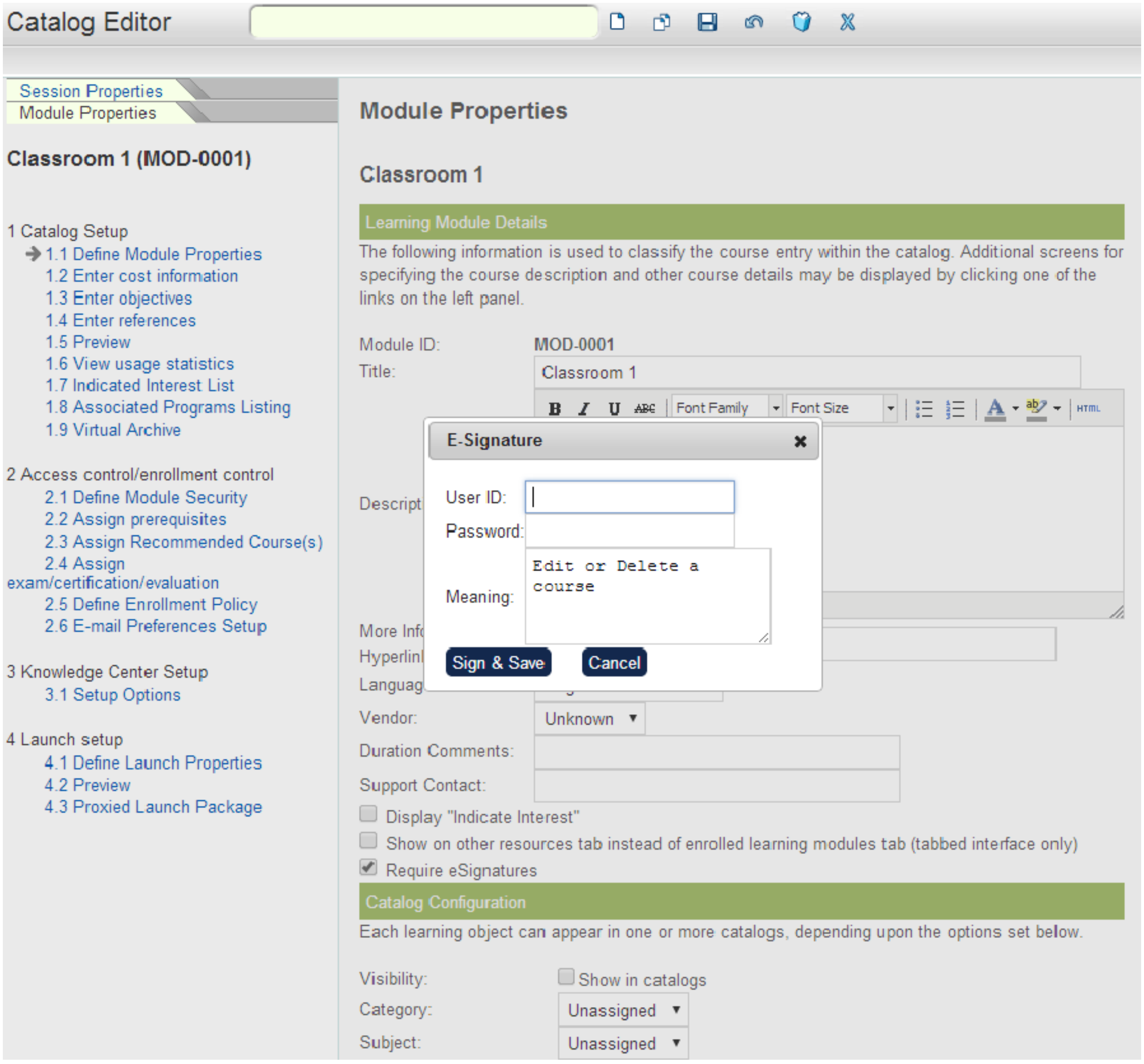
A user will be selected if his/her direct organization has attributes matching all of the selected organization attribute criteria.



Sample Organization Attribute Criteria for Permission Setting

Electronic signatures should honor LDAP configuration

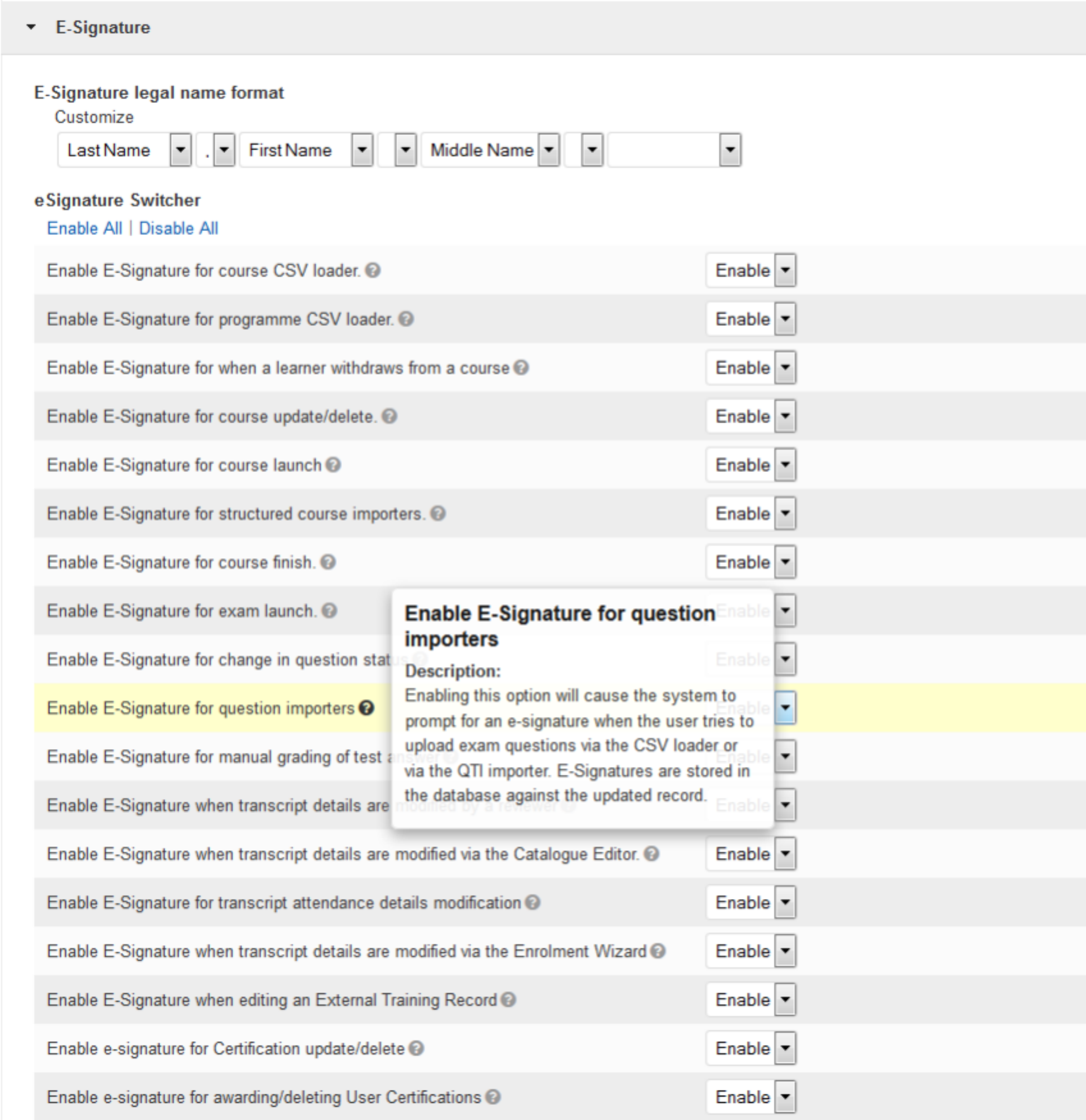
LDAP/Active Directory configured systems verifies electronic signatures authentication against the directory service rather than the local database.



Electronic signature request for editing a course.

e-Signatures at Organization Level

Managers can set e-Signature configurations in the Root organization level. This allows for configurations at the individual organizations as well.



e-Signature section in Root organization edit page.

Organization & Organization Attribute Filters

In maintaining the organization hierarchy, it is often time consuming to expand and collapse the tree levels to drill down to an individual level, hence a more user friendly feature that supports search capability on the maintenance screen.

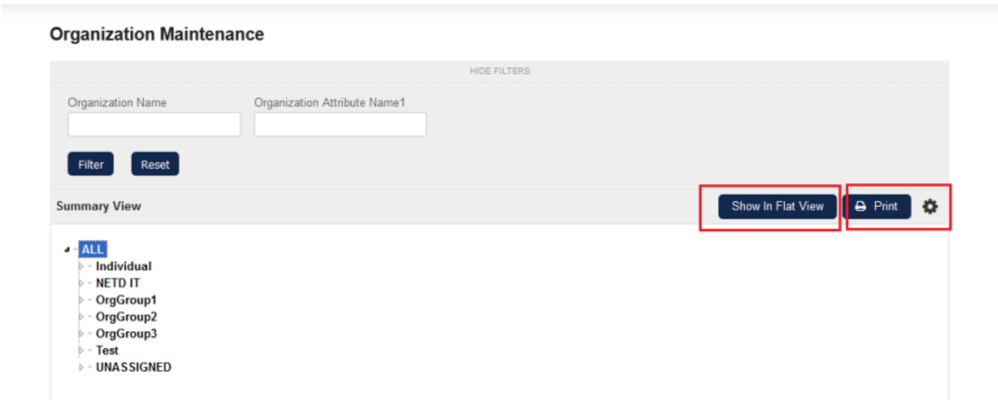
Dynamic organization attributes are useful when there's a need to classify the individual levels in the hierarchy. Additional information or relationships exist in different branches, and these are helpful when used as a filter in performing a Level search. Also on some User lists, it is a useful option to be able to filter by organization to quickly narrow down the relevant users in the list.

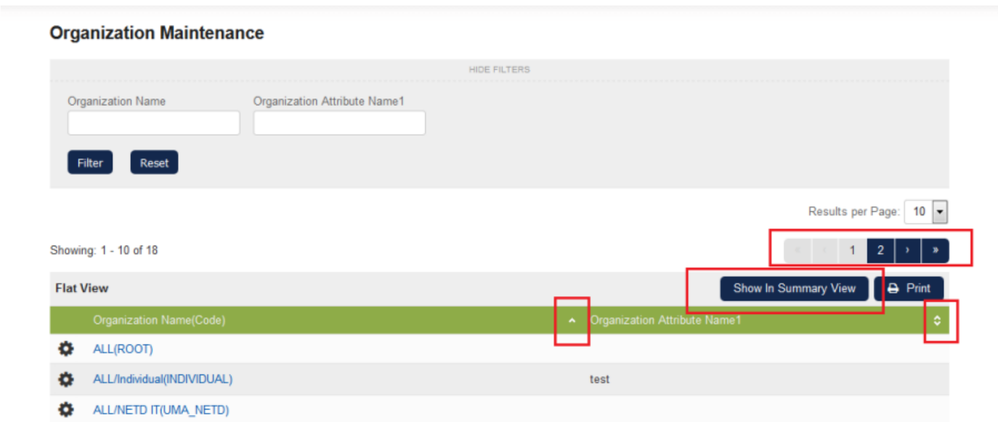
- **Organization Attributes as Organization Maintenance Filters**

In order to solve the problem stated above, the search capability has been added to the maintenance screen with relevant filters, namely an organization name keyword and organization attribute filters, for quick look up on relevant levels in the hierarchy. To display the relevant organization levels in the search results, a table view option (called Flat View) is available in addition to the existing Tree structure view. There is also an option to toggle between these two features for ease of use.

Other UI features on the Organization Maintenance page are also listed below:

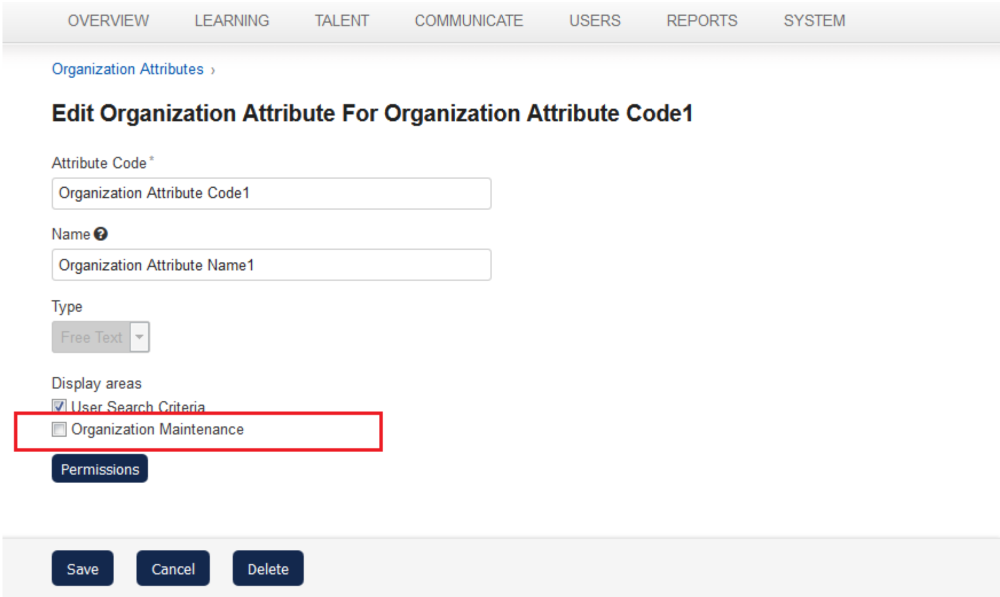
- A link to toggle between Flat View and Summary View
- Pagination on the Flat View
- Sorting function is added to the table
- Print screen function is supported



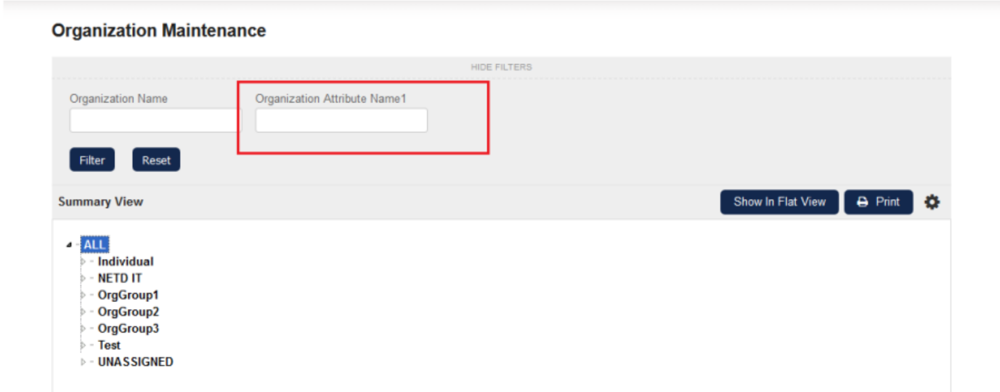


Organization Attributes are often used to classify organizations with certain values, filtering these values quickly narrows down the search parameters to the desired results.

At the Individual Organization Attributes setup page, the display area "Organization Maintenance" setting is available as a checkbox option.

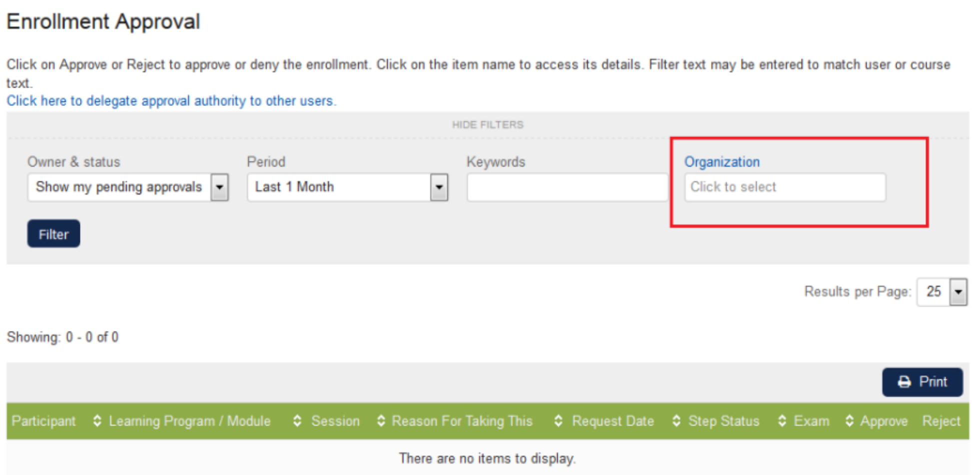


By checking this new "Organization Maintenance" display area option, the organization attribute of any supported field type will appear as filter on the Organization Maintenance page such as below.

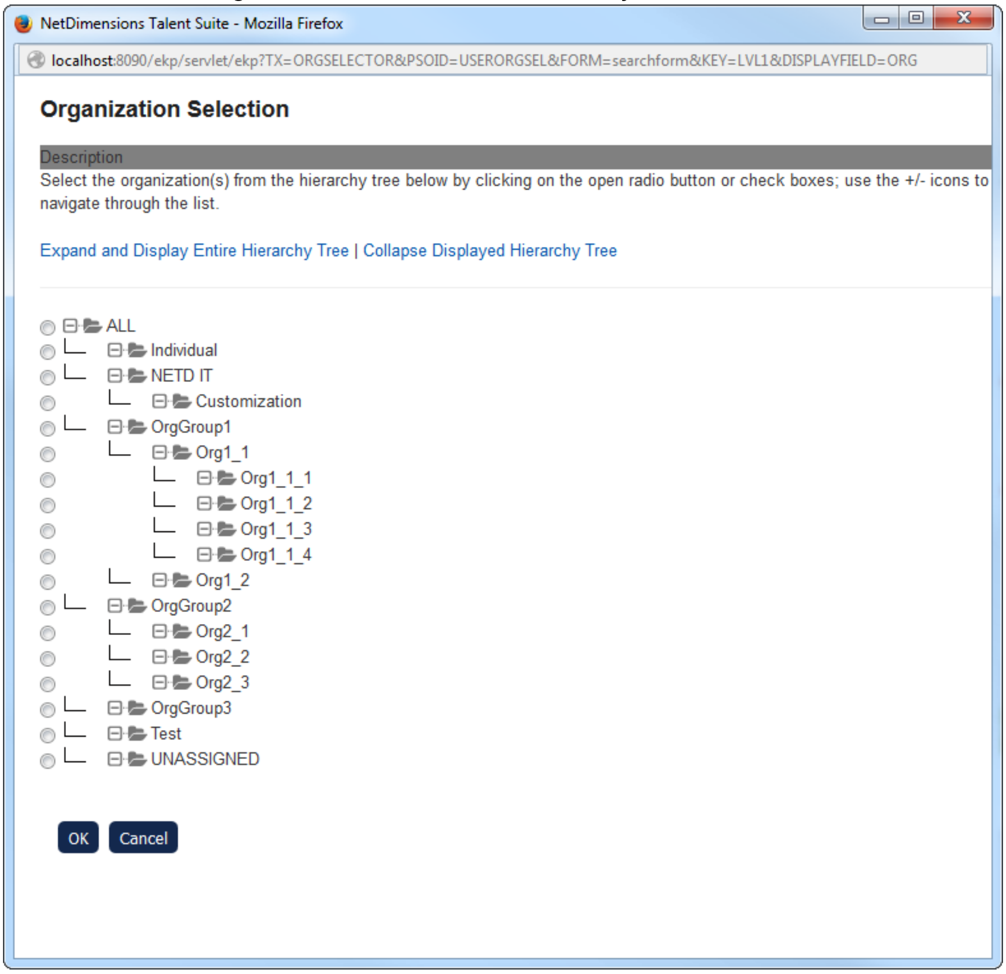


- **Organization as Enrollment Approval Filter**

Often theres a huge number of approval requests to be processed by an approver. Instead of searching through keywords, there is an option to use the organization filter to list requests from users belonging to a certain organization. This feature can be found in **Workspace > Enrollment Approval**



The standard organization selector window will pop up when the approver clicks on the Organization filter link for selecting a visible level from the hierarchy.



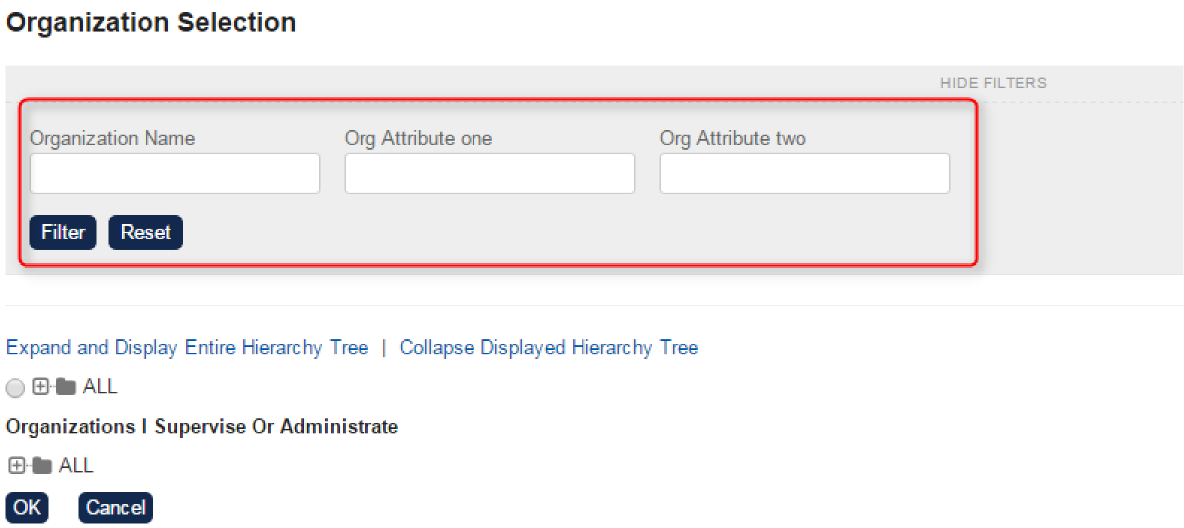
- ***Enriched View of Organization Selector***

When using the Organization Selector to single out a particular level to be selected, it may be too difficult to drill down to the desirable level in a complex organizational hierarchy, thus it would be more user friendly for the selector to support search filters to look up a certain business unit in the hierarchy for selection.

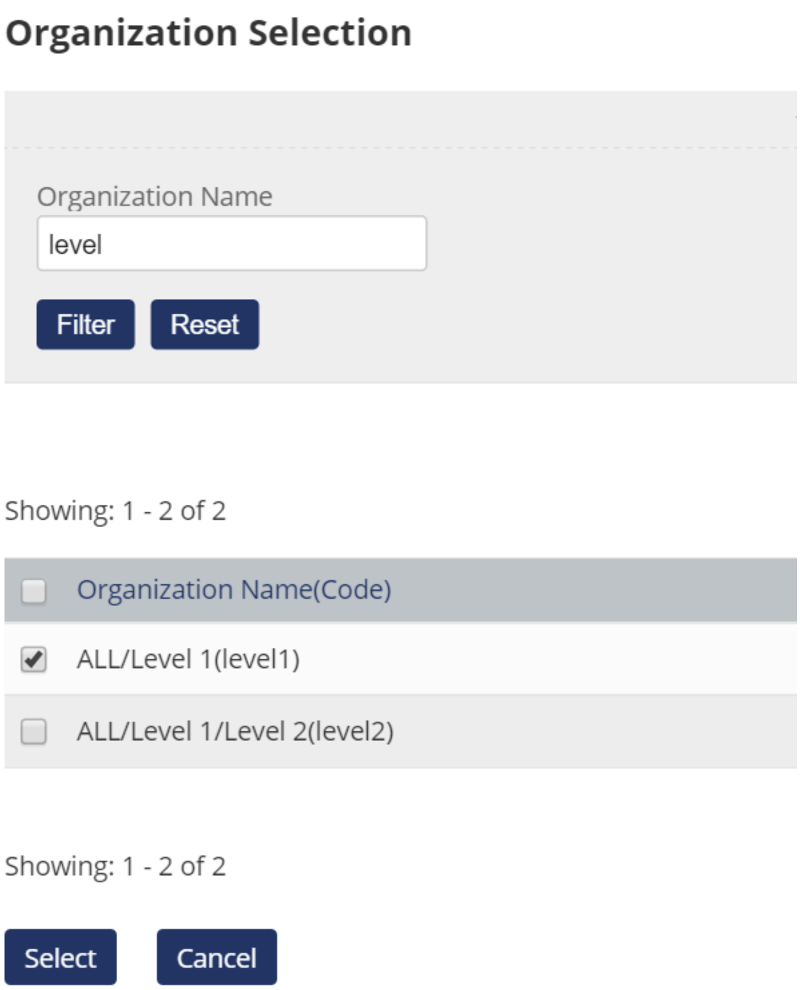
- **Relevant Filters in Organization Selector**

Meaningful filters are added to all places launching the Organization Selector including Organization Name and Organization Attributes. (Note: These filters are only available when the System Configuration option "Organization Selector Format" has been set to "Tree Format".)

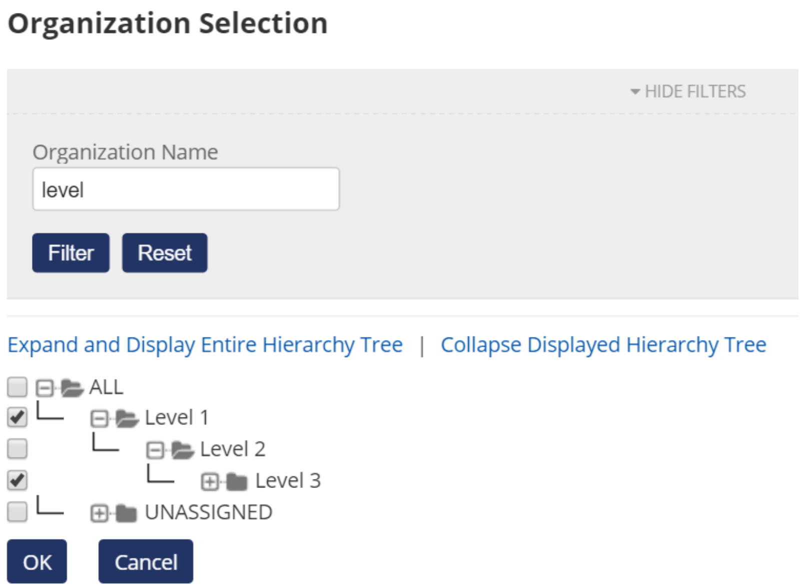
The Administrator can search an organization level by name or using organization attributes.



After entering search criteria and clicking the "Filter" button, search results are displayed in a table format, each result row becomes a particular relevant level for selection with the hierarchical information displayed.



An organization level within the search results can be selected by clicking the "Select" button, it then would revert back to the expanded hierarchical tree to show the selections made accordingly. Note that if some level is already selected, even if the search criteria are matched, the results would filter out selected levels.

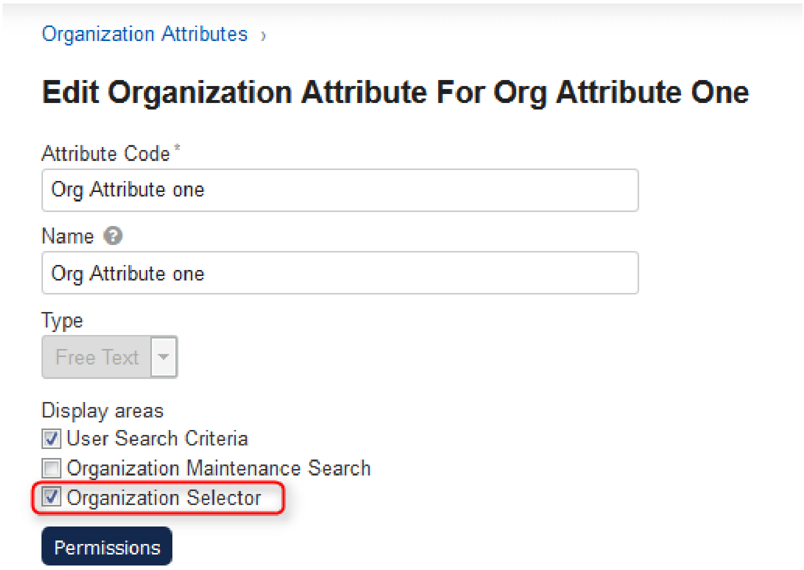


Organization selector may come as single-selection mode or multi-selection mode:

- In ***single-selection mode***, selection made in the search results will replace the existing selection.
- In ***multi-selection mode***, selections made in the search results will add to existing selections.

- **New Display Areas Setting in Organization Attribute**

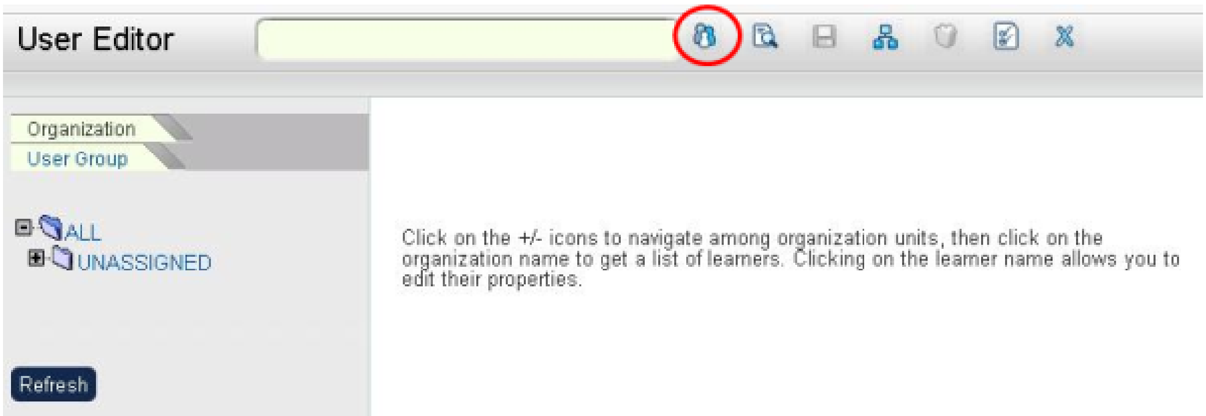
A new option is added to the Display areas setting on the Organization Attribute configuration which means a particular attribute can be explicitly enabled to be used as a search filter in the Organization Selector. If the "Organization Selector" option is checked, then this organization attribute will be shown as an Organization Selector filter.



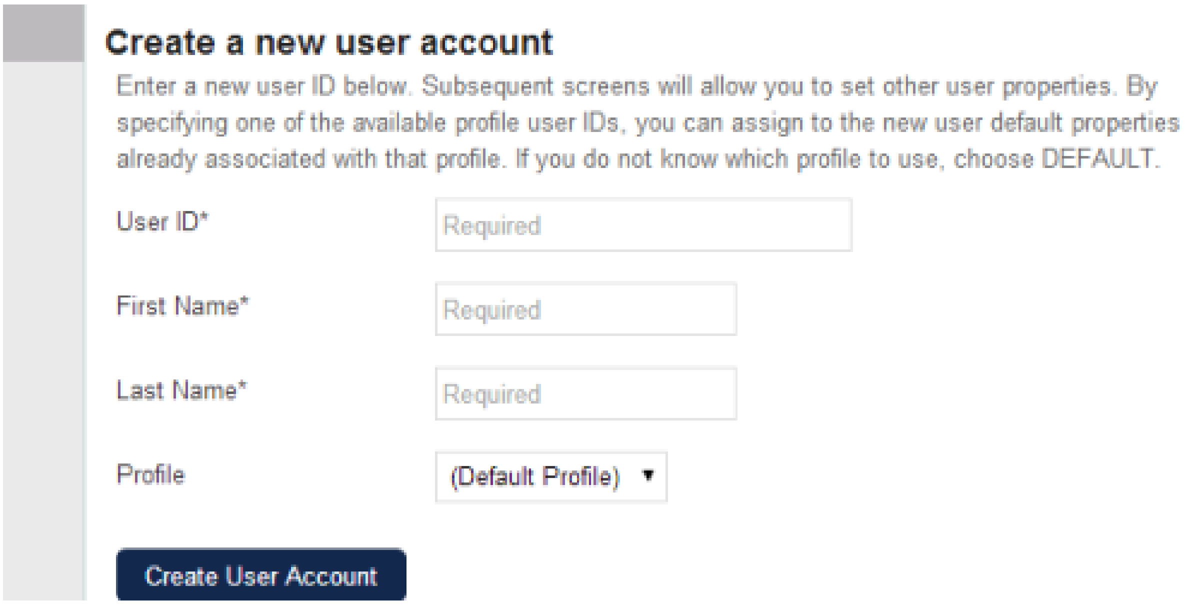
Create and Edit Users

To create a new user record:

1.From the *User Editor,* click the **Create User** icon.

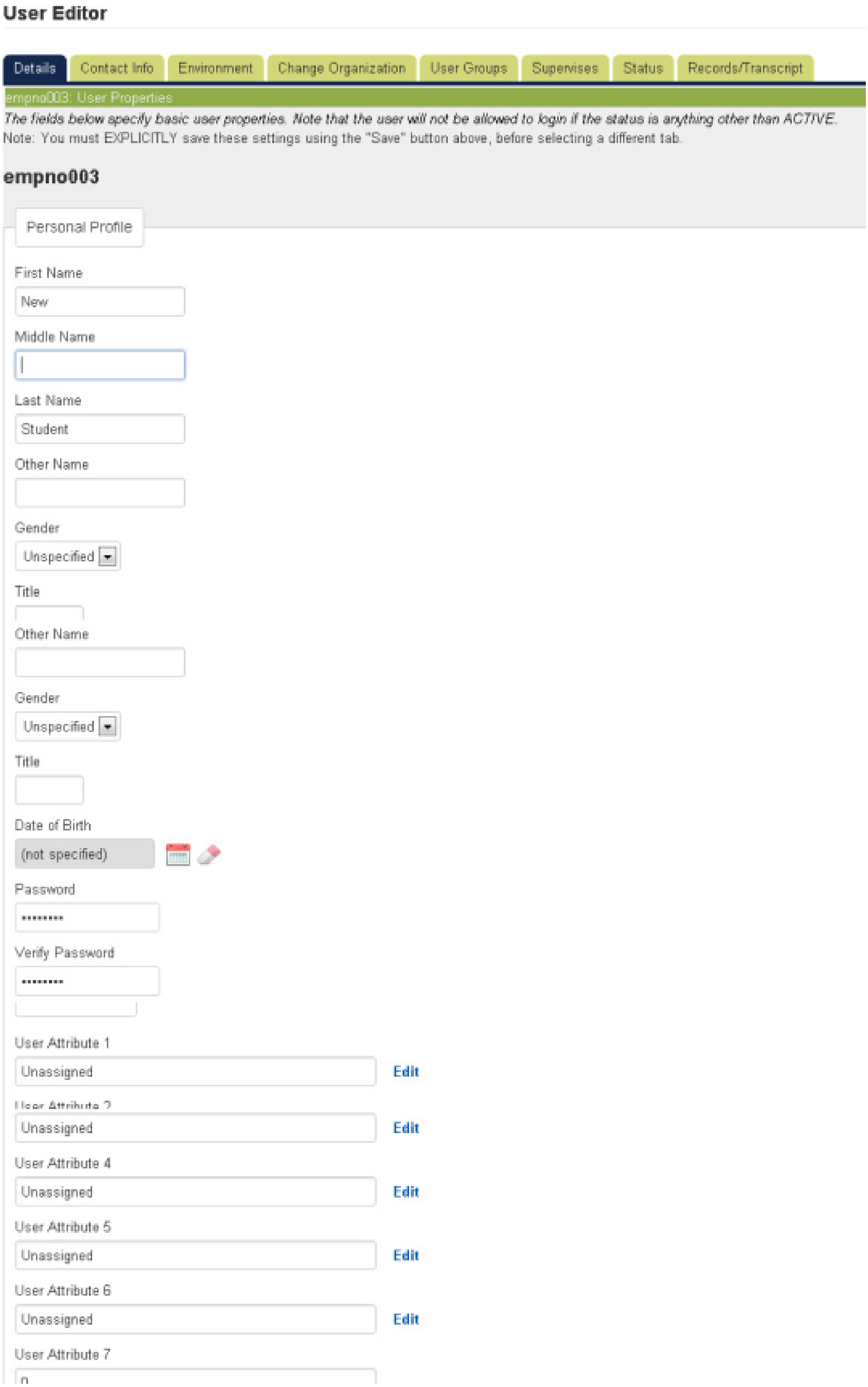


2.The *User Editor* screen refreshes and displays the *Create a New User Account* page. From here enter the relevant user details:



- Enter the new User ID in the *User ID* field.
- Choose the user profile by clicking on the arrow next to the profile field.
- Click on your desired choice from the drop down list that appears.
- Enter the password in the Password field.
- Re-enter the password in the *Verify Password* field.
- Click the **Create User Account** button.

The *User Properties* screen appears. From here, you can now start editing the user details. If the *User Properties* screen does not appear, click on the **Details** tab of the *User Properties* screen.

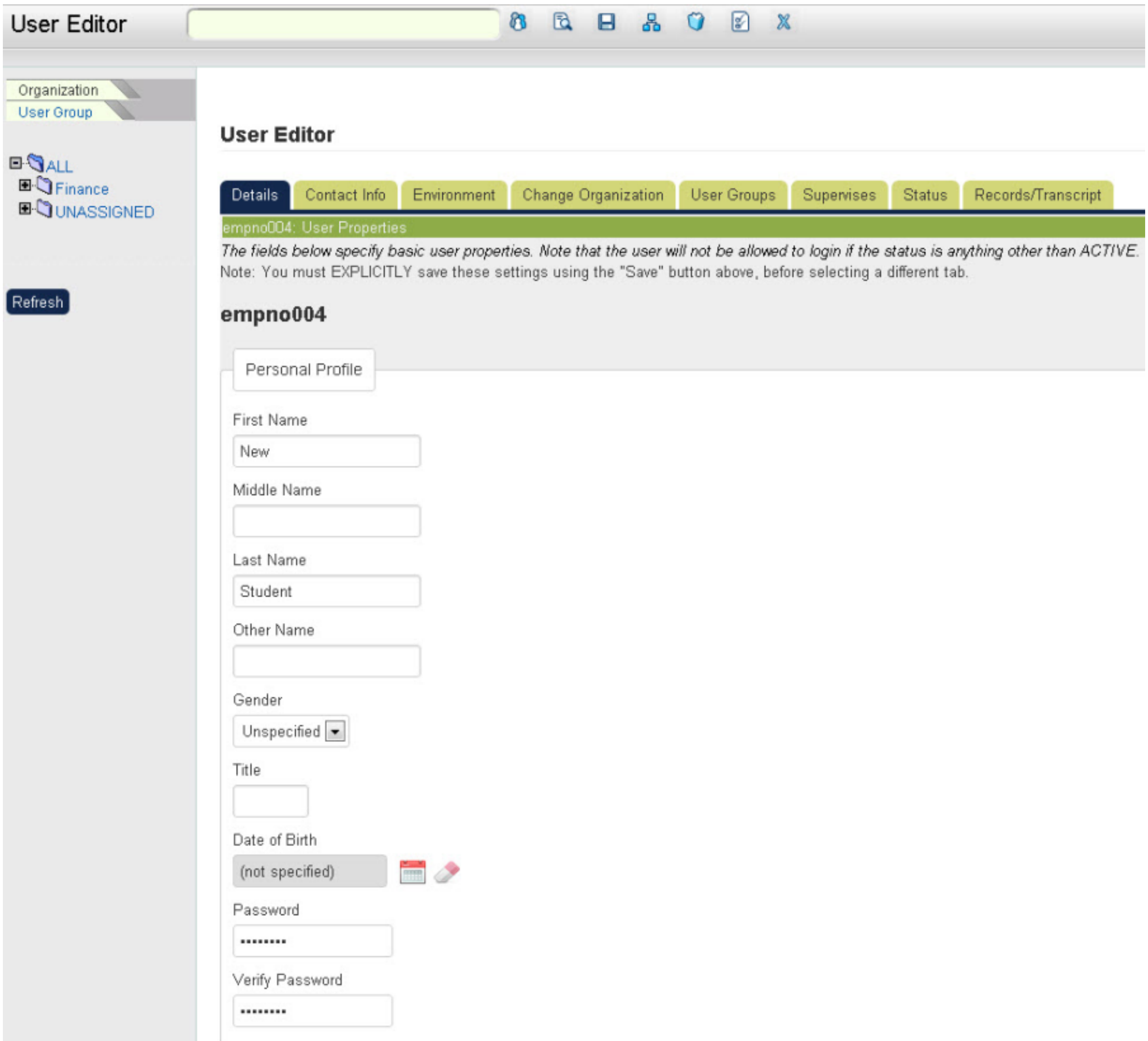

User Editor
Details
Contact Info
Environment
Change Organization
User Groups
Supervises
Status
Records/Transcript
empno003: User Properties
The fields below specify basic user properties. Note that the user will not be allowed to login if the status is anything other than ACTIVE.
Note: You must EXPLICITLY save these settings using the "Save" button above, before selecting a different tab.
empno003
Personal Profile
First Name
New
Middle Name
Last Name
Student
Other Name
Gender
Unspecified
Title
Other Name
Gender
Unspecified
Title
Date of Birth
(not specified)
Password
Verify Password
User Attribute 1
Unassigned
Edit
Unassigned
Edit
User Attribute 4
Unassigned
Edit
User Attribute 5
Unassigned
Edit
User Attribute 6
Unassigned
Edit
User Attribute 7

User Properties

The User Properties is divided into four sections, namely:

- Personal Profile
- Employee Status
- Connect
- User Attributes
- Template Setting

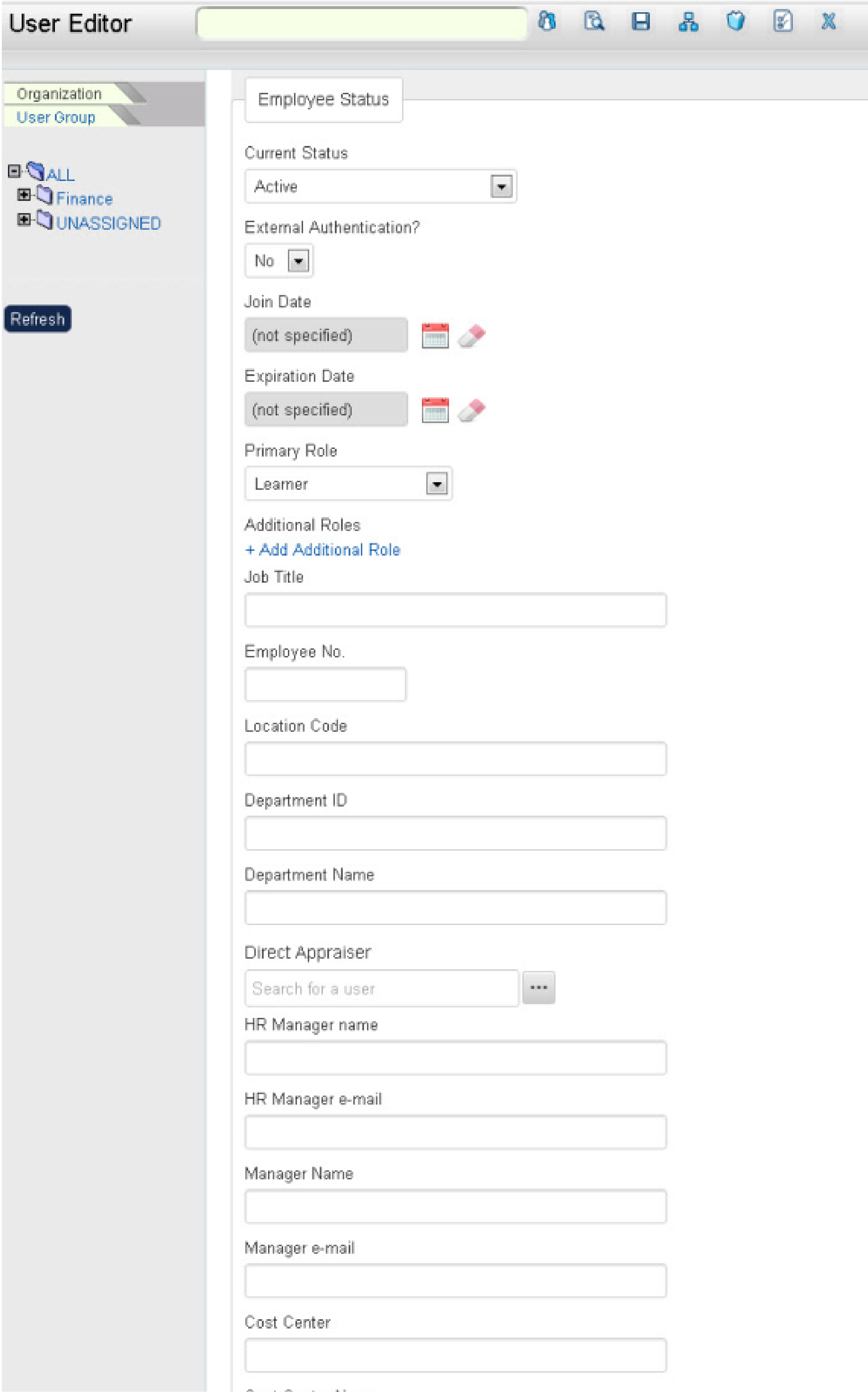
1.Under the ***Personal Profile section,*** enter the following details:



- Enter the participant's first name in the *First Name* field.

- Enter the participant's middle name in the *Middle Name* field.
- Enter the participant's last name in the *Last Name* field.
- Enter other names in the *Other Name* field.
- Enter the gender by selecting it from the drop-down menu.
- Enter the salutation in the *Title* field.
- Enter the date of birth by clicking on the calendar icon next to the *Date of Birth* field.
- Click on the desired selection from the drop down list that appears.
- To amend the password, enter the password in the *Password* field and then re-enter the password in the *Verify Password* field.

2. Under the ***Employee Status section***, enter the following details:


User Editor
Organization
User Group
ALL
Finance
UNASSIGNED
Refresh
Employee Status
Current Status
Active
External Authentication?
No
Join Date
(not specified)
Expiration Date
(not specified)
Primary Role
Learner
Additional Roles
+ Add Additional Role
Job Title
Employee No.
Location Code
Department ID
Department Name
Direct Appraiser
Search for a user
HR Manager name
HR Manager e-mail
Manager Name
Manager e-mail
Cost Center

- Select the current status (e.g. Active, Suspended or Account Closed) by selecting it from the drop-down menu. Only Active users can log onto the Talent Suite.
- If the user is to be authenticated on an external system (like LDAP), select "External Authentication". Otherwise, the user will be authenticated against the username and password in the NetDimensions Talent Suite database.
- Enter the join date by clicking on the calendar icon next to the *Join Date* field.
- Enter the expiration date by clicking on the calendar icon next to the *Expiration Date* field.
- Select the role by selecting it from the drop-down menu. A user's role defines the access rights to data and Talent Suite functionality.

Note: User can take additional roles on top of his primary role (multiple role per user). The flexibility on role assignment makes access management easier.

- Enter the participant's job title in the *Job Title* field.
- Enter the participant's employee number in the *Employee #* field.
- Enter the Location Code.
- Enter the Department ID and Department Name
- Select the participant's direct appraiser.
- Enter the participant's HR Manager name
- Enter the participant's HR Manager's email address
- Enter the participant's manager in *Manager Name* field.
- Enter the manager's e-mail address in the *Manager email* field.
- Enter the relevant cost center in the *Cost Center* field.
- Enter the cost center name in the *Cost Center Name* field.

Option to activate/deactivate additional roles on System Configuration

(applies to NetDimensions Talent Suite)

The Talent Suite allows assigning additional roles to a user in the User Editor. Administrators are given the option to activate or de-activate these roles in System Configuration. This strengthens the security level for some clients having stringent role level protocols as they may want to prevent lower-level administrators from assigning any particular additional role(s).

In the System Configuration screen, under the USER category, a setting named "Allow additional roles" has been added. This setting is checked by default.

Configuration Option Description

Option

Allow additional roles

Description

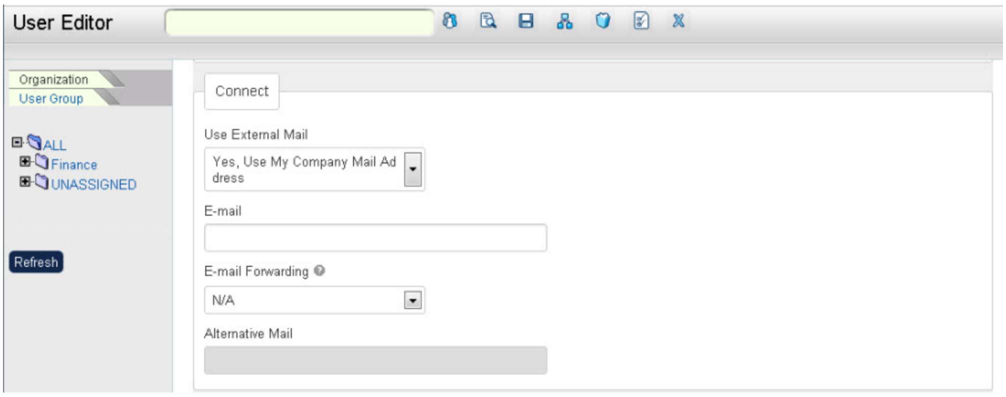
If this is checked, it enables users to add 'additional roles' to a user on the User Editor.

Special Notes

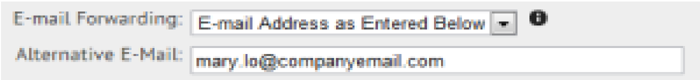
This new feature applies to User Data Loader and Report R109 as well. The column of the additional roles will be ignored if the option is disabled. And only primary roles will be considered in this case.

> **Note:**
> User can take additional roles on top of his primary role (multiple role per user). The flexibility on role assignment makes access management easier.

3.Under the ***Connect section***, enter the following details:



- Specify whether the user will employ the Talent Suite e-mail or an external system. Click on the arrow next to the *User External Mail* field.
- Enter the participant's e-mail address in the *Email* field.
- Enter the *E-mail Forwarding* field. When this option is configured, all mail messages will then be forwarded to the selected person instead of the user him/herself. There will be five options for the choice of the target recipient:

Option	Behavior
(N/A)	Default Setting. The e-mail forwarding feature will be turned off.
Direct Appraiser	It will look up the system to find the corresponding e-mail address of the Direct Appraiser.
HR Manager e-mail	It will look up the value entered in User Detail (as highlighted above in red in Figure 1).
Organization Approver	It will look up the system to find the corresponding e-mail address of the Organization Approver.
E-mail address as entered below	It will use the Alternative E-mail entered below the option for e-mail forwarding. 

Note: The system will only look up the forwarding e-mail for one level and will not keep forwarding the e-mail if the target user has also enabled the on-behalf feature. For example:

User A has turned on the e-mail forwarding feature and is forwarding his e-mail to his Direct Appraiser (User B).

Case 1 – If User B does not have an e-mail, the e-mail will be lost.
Case 2 – If User B has also turned on the e-mail forwarding feature, the forwarded e-mail will only send to his/her e-mail address, but not the forwarded e-mail.

- **Forwarded E-mails**

For the forwarded email, the subject and the email body will be modified as follows:

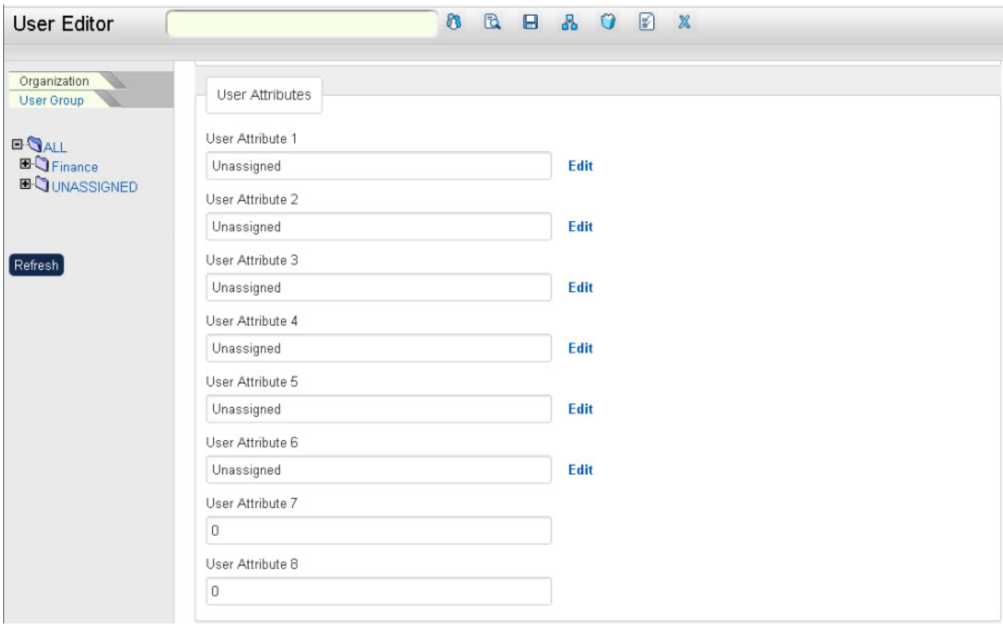
Original Recipient: May Brown
Forwarded to: John Smith

Original Email	**Modified Email** (received by John Smith)
Subject: Enrollment Confirmation Dear May Brown, you have been enrolled …	**Subject**: Attn: May Brown – Enrollment Confirmation This e-mail was sent to you for the attention of May Brown. Please forward this information accordingly. <new line> <new line> Dear May Brown, you have been enrolled …

Note: Both "Attn: {original user name} --" and "This e-mail was sent to you for the attention of {original user name}.

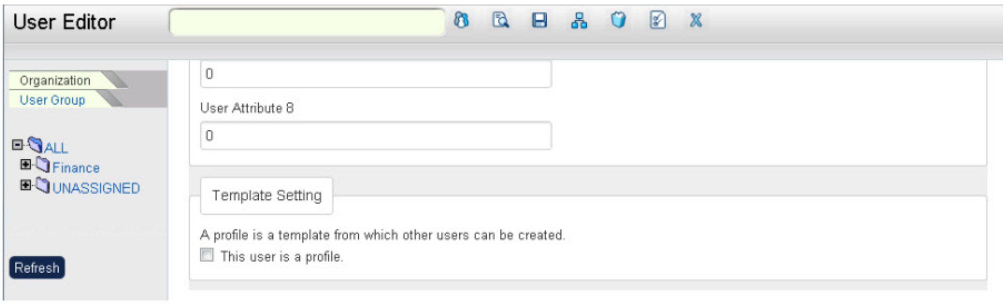
Please forward this information accordingly. <new line><new line>" are configurable by language file.

4.Under the ***User Attributes section***, enter the following details:



- Enter the User Attribute details. Click on the arrow next to the *User Attribute* fields (if the system has been configured for drop down lists*) or enter the User Attribute. (The number of attributes displayed will depend on system the configuration.)
- Click on the desired selection from the drop down list that appears. (If the system has been configured to display a drop down list for the field*)

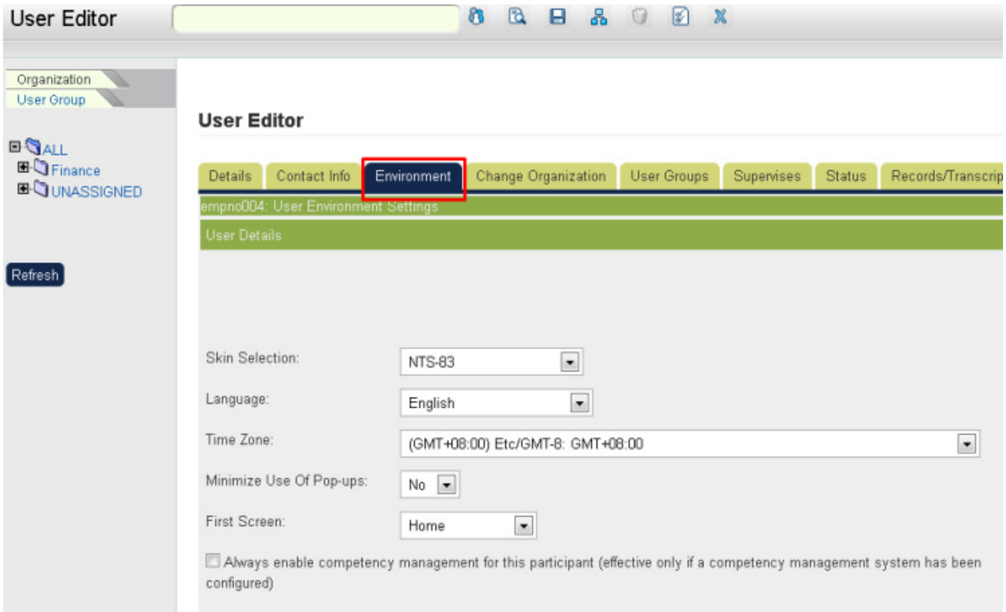
5.For the ***Template section,*** to specify whether this user is a profile, check the box. Profiles are used to preset attributes that are often used for specific groups of people, e.g. countries (language and timezone), roles, departments, etc.



6.Click the **Save** button to keep the changes.

Setting the User's Environment

From the *User* Editor screen, click the **Environment** tab.

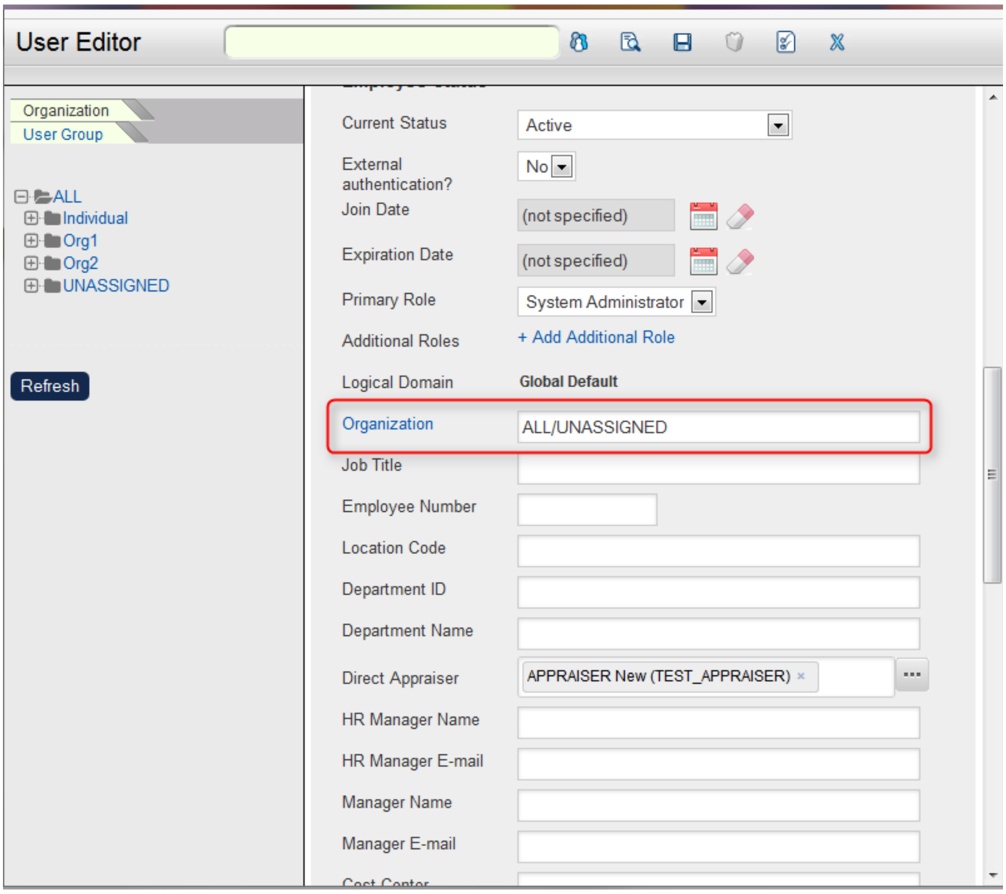


The *Environment* screen appears. From here, you can modify the following environment setting:

1. Select the user's skin. The skin usually is the company's corporate identity of this user.
2. Select the preferred language.
3. Select the user's time zone/geographic location. The correct setting is necessary to display the right times for classroom courses, seminars, workshops, and virtual classroom courses ("webinars").
4. Select the first screen after the user logs in. By default, this is the Talent Suite home page.
5. Select a content server. Content servers are usually used in low-bandwidth environments, i.e. on sites that for example only have ISDN or slower connections to the Internet/intranet. Content servers are local, specially configured Web servers. Please refer to the Content Server whitepaper on the NetDimensions support site.
6. If you have an external competency management system connected to the Talent Suite, you need to activate the checkbox.

Change Organization Assignment

Moving a user from one organisation to another can be done under **User Editor > Details .** Administrat or can simply use the organisation selector to choose which organisation the target user belongs to.



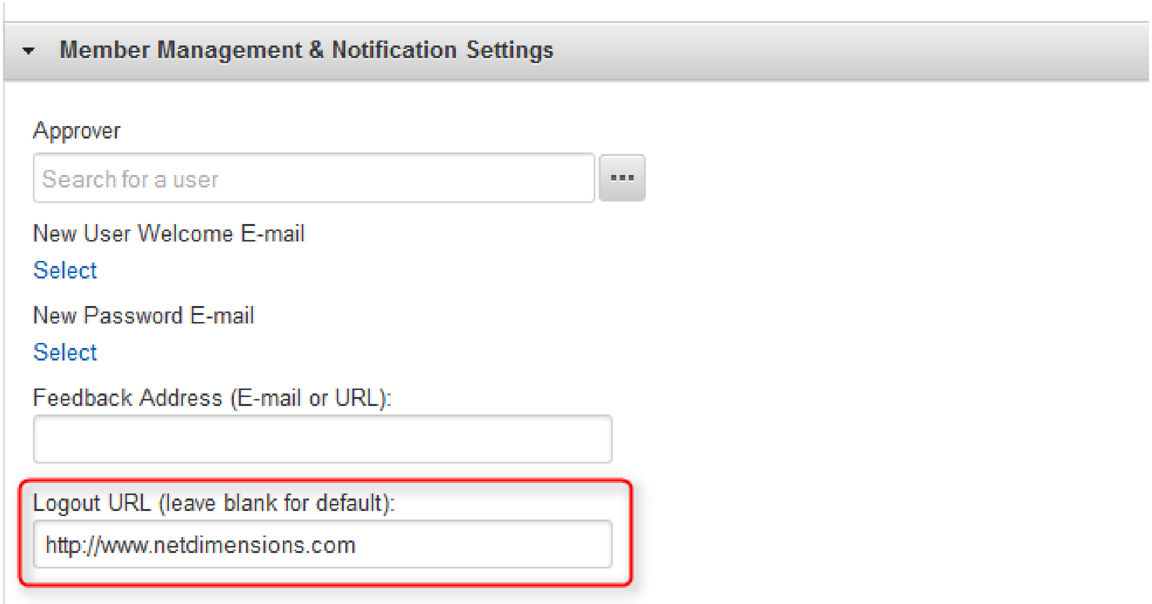
The new Organisation selector in User Editor

Note:

- This feature is available only when "Allow users to have multiple organizations" is turned off.
- If "Allow users to have multiple organizations" is turned on, the system behaves exactly the same as before.

Logout URL at Organization Level

Different organizations can access the Talent Suite from different login pages. Users of certain organizations can be brought to a particular login page when they log out.



In Organisation Editor, you can now configure the logout url for an organisation. If not configured, the default will follow parent organisation's setting.

Note: Previously, the same setting was available in the Logical Domain Editor. It has been moved to the Organization Editor.

Group Review / Appraisal List

To specify groups of users that a user can review see section *Define Supervision Rights* on this document.

User Data Loader

The User Data Loader allows creation, updating, and deletion of user accounts in bulk. For more information, please refer to EN145 Data Import Export.

Permissions on User Attribute Extension Values

A single user attribute may be used by an entire organization for reporting purposes but its values may be defined by specific organisation units. For example, it may be undesirable for a user attribute value created by an administrator in Germany to be edited/deleted by an administrator in China. Thus, permission checking has been added to user attribute extension values.

- **Read Permission**

    a. View user attribute extension values in Manage > Users > User Attribute Extension
    b. Select user attribute extension values in User Editor, User CSV Loader, Auto-Enroll, Job Profile Auto-Assign, User Group, and User Selector

- **Unrestricted Permission**

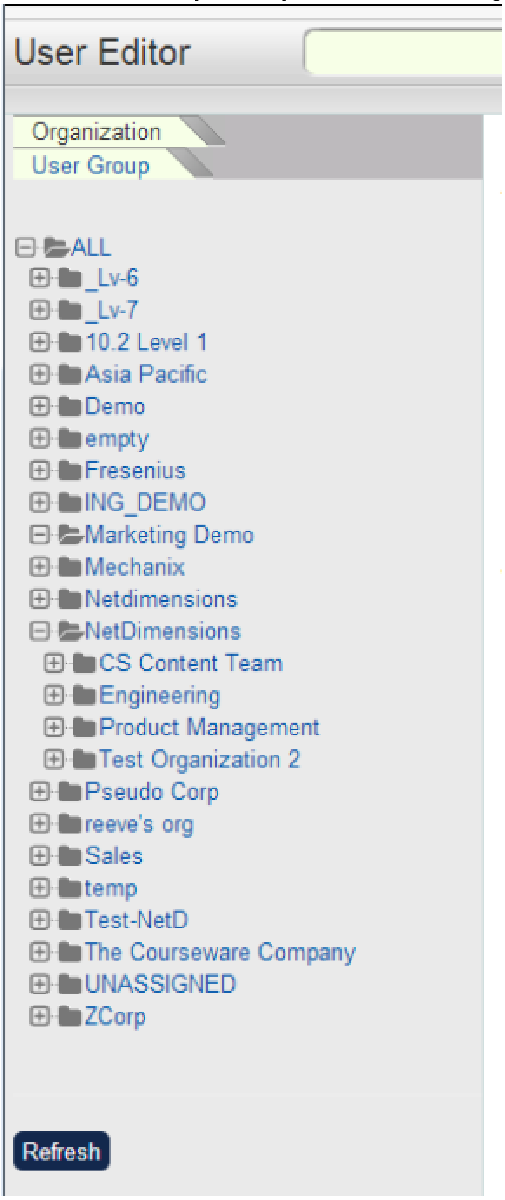
    a. Edit/delete user attribute extension values in Manage > Users > User Attribute Extension

On clicking the Permissions button, a permission selector will be shown and allow user to set permissions.

Note: Permissions on user attribute extension values are only applied to drop-down items. If a user attribute extension is of free text type, there will be no permission checking for its value.

Search for Users

To locate a user you may use the left navigation bar in the User Editor screen.

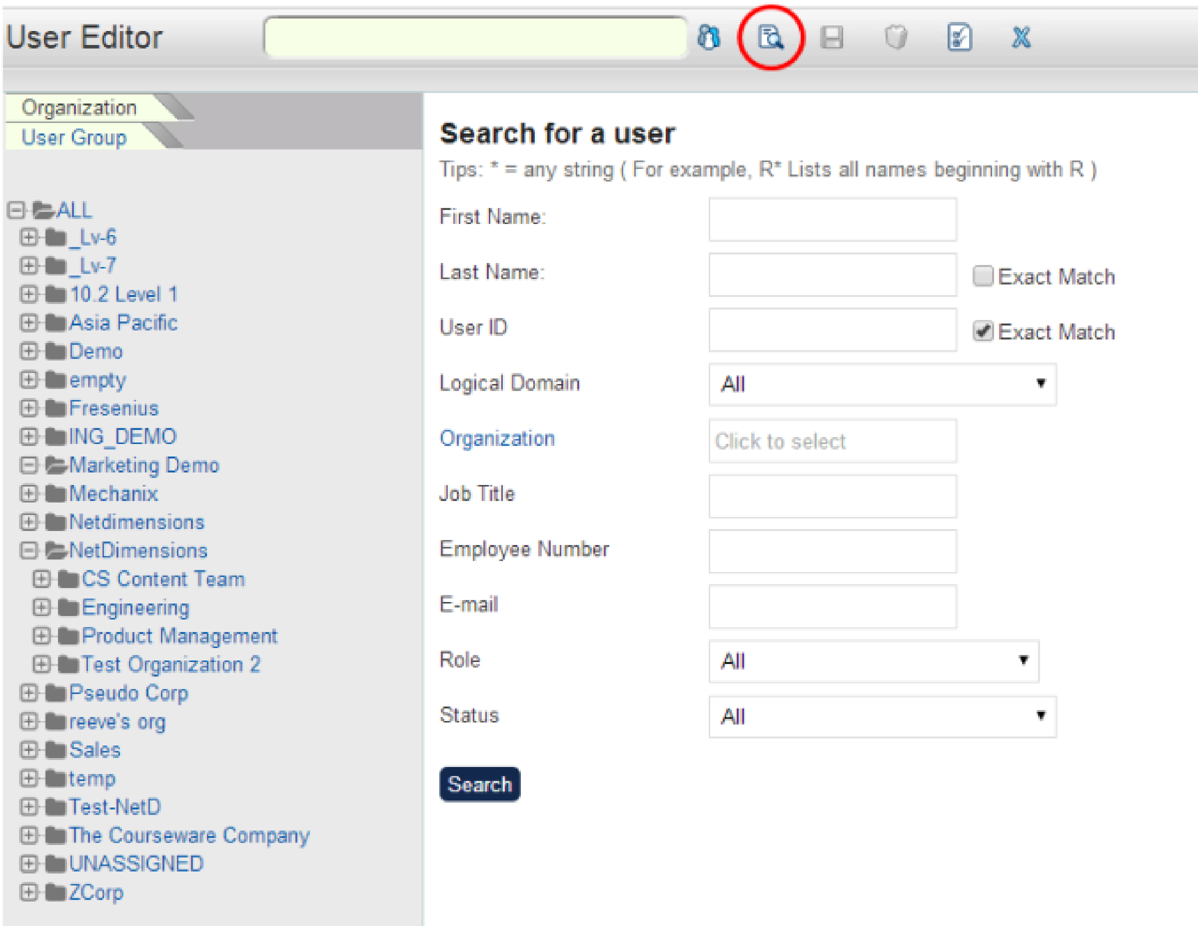


However, if the list is too long or you do not see the desired user on the bar, use the Search facilities of the User Editor. To activate these functions:

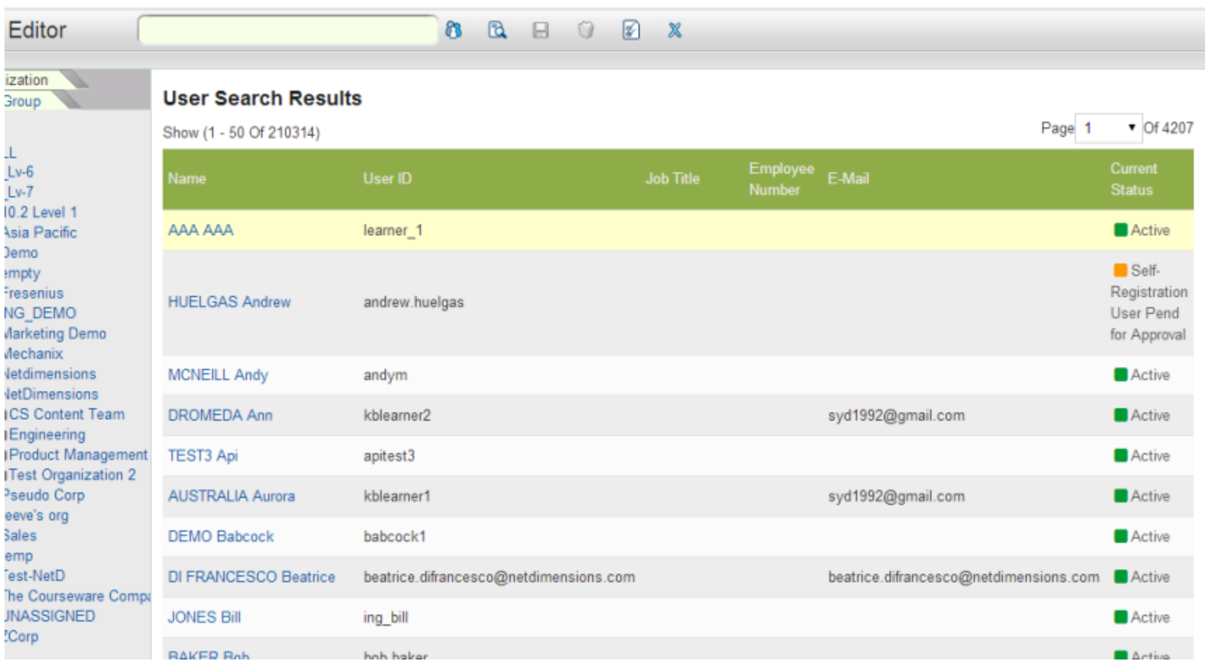
1.Click **Search** icon in the *User Editor* screen. The *User Search* screen appears. You can filter your search result by providing the following parameter:

- Organization
- Role
- Status
- User ID
- Given Name
- Family Name
- Job Title
- Employee No
- E-mail

You can also use wildcards to search for user. For example, you can use the asterisk (*) wildcard to search for a string of characters. For instance you want to search user with ENG at the beginning of title of the user, type "ENG*" in the User name entry field.



2.Click the **Search** button. The result is display on the screen.



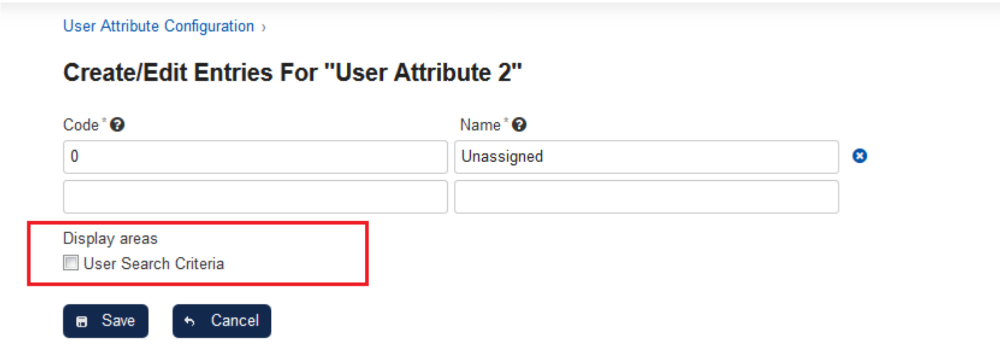
User Attributes

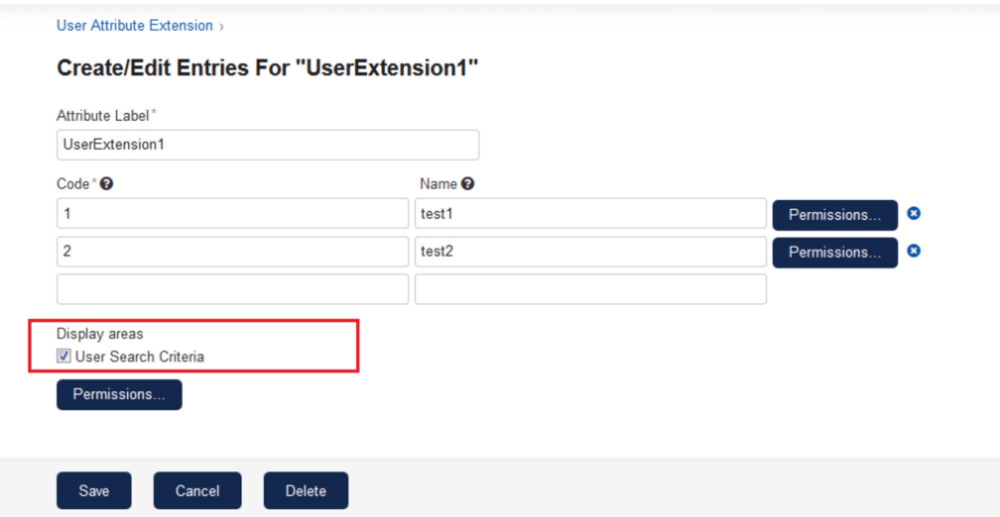
User data is an integral component of the system, user attributes and organization attributes can be used to classify certain users with certain characteristics or the organizations with certain properties that they belong to. It is now possible to retrieve users based on user attributes or organization attributes by adding them as filters to the Users Search.

• User Attributes as Manage > Users Filters

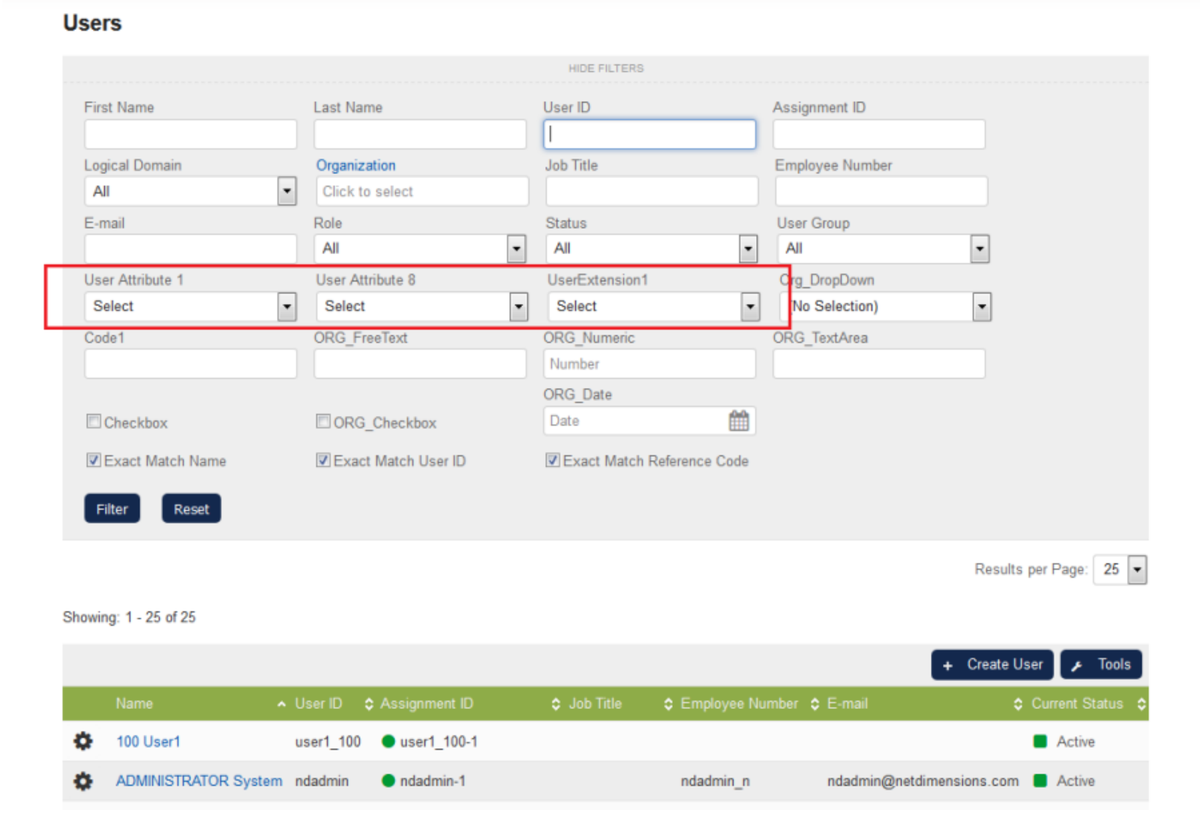
There are 8 user attributes configurable as well as extensions available to support more than this number. Both of them support drop down or free text field types. User & user extension attributes of both field types can be searched via **Manage > Users.**

At each User Attribute and User Extension Attribute setup page, a display area setting "User Search Criteria" is made available as a checkbox option. By default, checkbox is not checked.



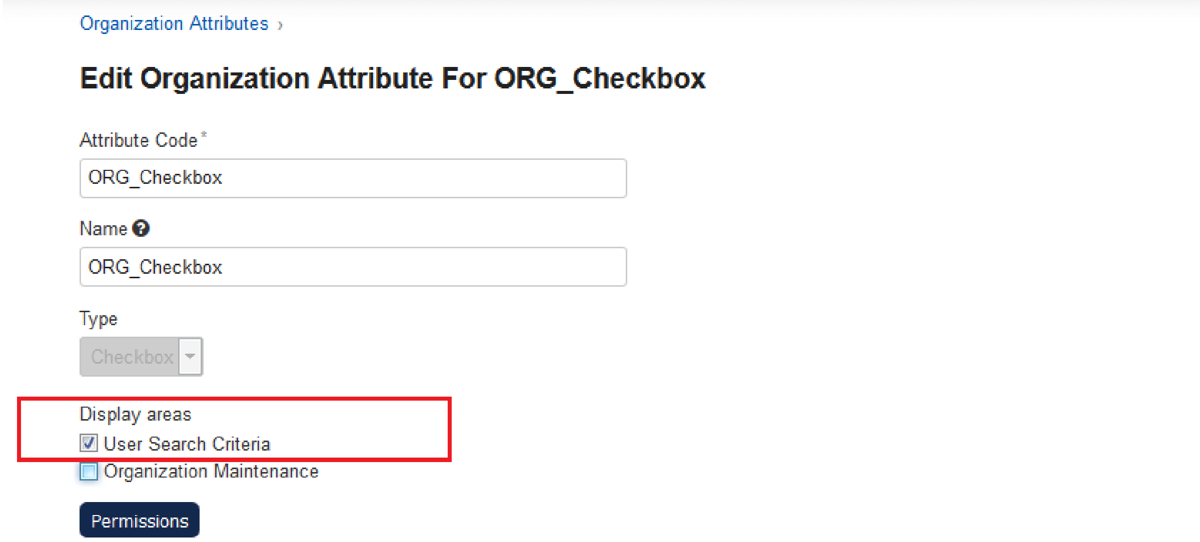


By checking the "User Search Criteria" display area option, the user attribute or attribute extension will appear on the Users Search screen as a filter.

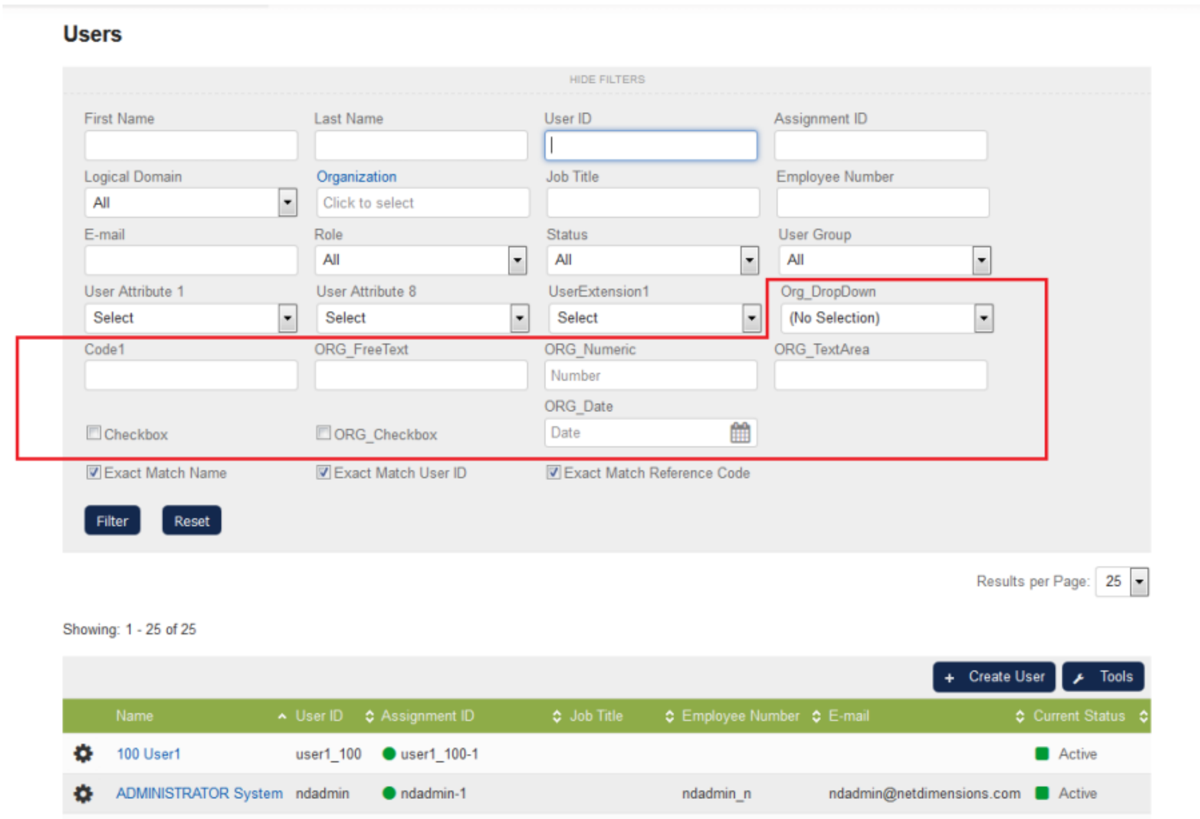


- ## Organization Attributes as Manage > Users Filters

Similarly, organization attributes of all supported types can be enabled as filters under **Manage > Users.** At each Organization Attribute setup page, a display area "User Search Criteria" setting is made available as a checkbox option. By default the checkbox is not checked.



By checking the "User Search Criteria" Display areas option, the organization attribute filters will appear on the User Search page which allowing searching by organization attributes


Users
HIDE FILTERS
First Name
Last Name
User ID
Assignment ID
Logical Domain
All
Organization
Click to select
Job Title
Employee Number
E-mail
Role
All
Status
All
User Group
All
User Attribute 1
Select
User Attribute 8
Select
UserExtension1
Select
Org_DropDown
(No Selection)
Code1
ORG_FreeText
ORG_Numeric
Number
ORG_TextArea
ORG_Date
Date
Checkbox
ORG_Checkbox
Exact Match Name
Exact Match User ID
Exact Match Reference Code
Filter
Reset
Results per Page: 25
Showing: 1 - 25 of 25
Create User
Tools
Name
User ID
Assignment ID
Job Title
Employee Number
E-mail
Current Status
100 User1
user1_100
user1_100-1
Active
ADMINISTRATOR System
ndadmin
ndadmin-1
ndadmin_n
ndadmin@netdimensions.com
Active

User Groups

A User Group is a group of users who may have some common goals or attributes. Classification of users into groups provides extra flexibility apart from roles, organization and custom user attributes in selecting users for various purposes. For example,

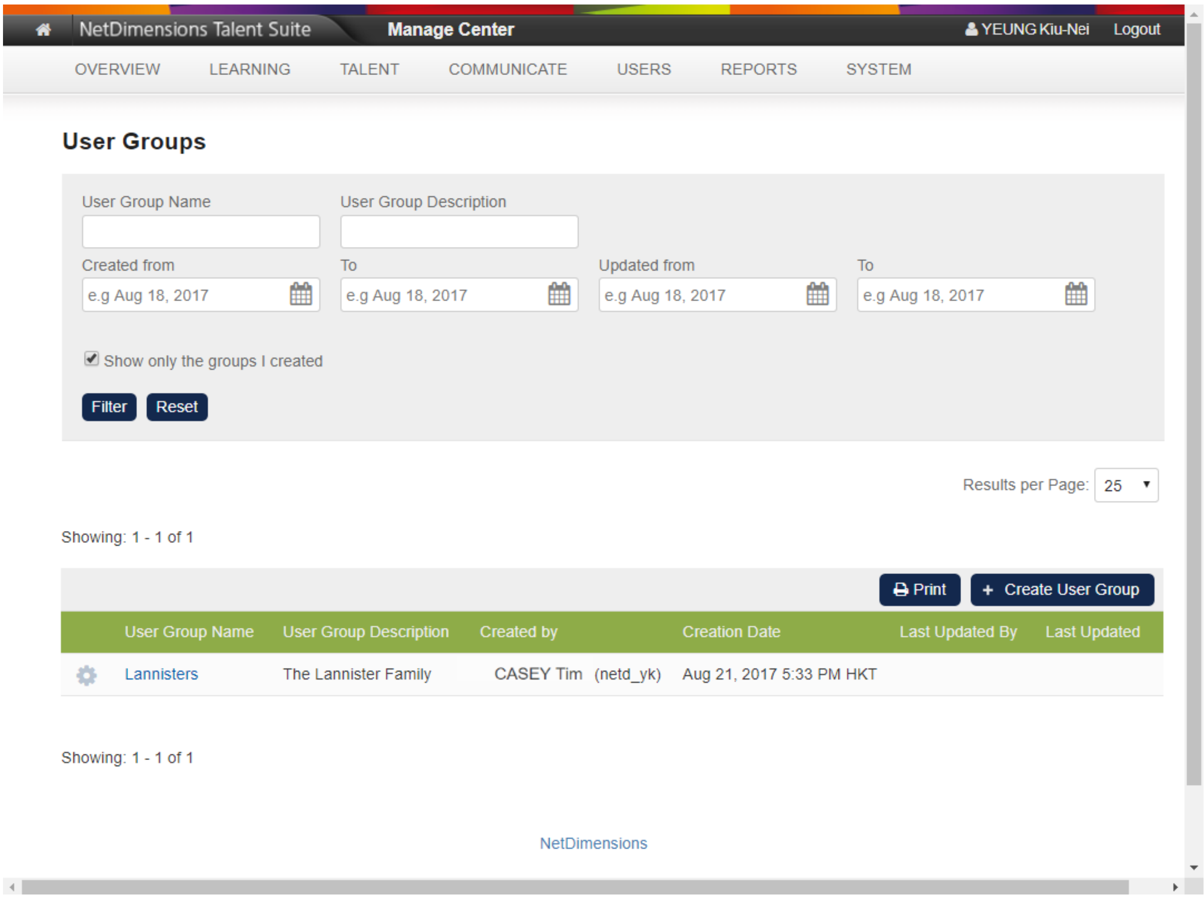
- Granting permissions
- Auto Enrollment onto courses
- Group Enrollment onto courses
- Job Profile auto-assignment
- User selection

To enable User Group Management for a Role, enable "User Groups" under Manage Features > User Manager Features for the required Role. Once enabled, users with the appropriate role access control will be able to access "User Groups" under **Manage Center > USERS > GROUP AND ORGANIZATION > User Groups**. This page will list all User Groups visible to the logged in user with the ability to filter the list by:

1. User Group Name
2. User Group Description
3. Created From/To
4. Updated From/To
5. Show only the groups I created

Depending on role access and permissions, there will be options to:

1. Create User Group
2. Edit User Group
3. View Members

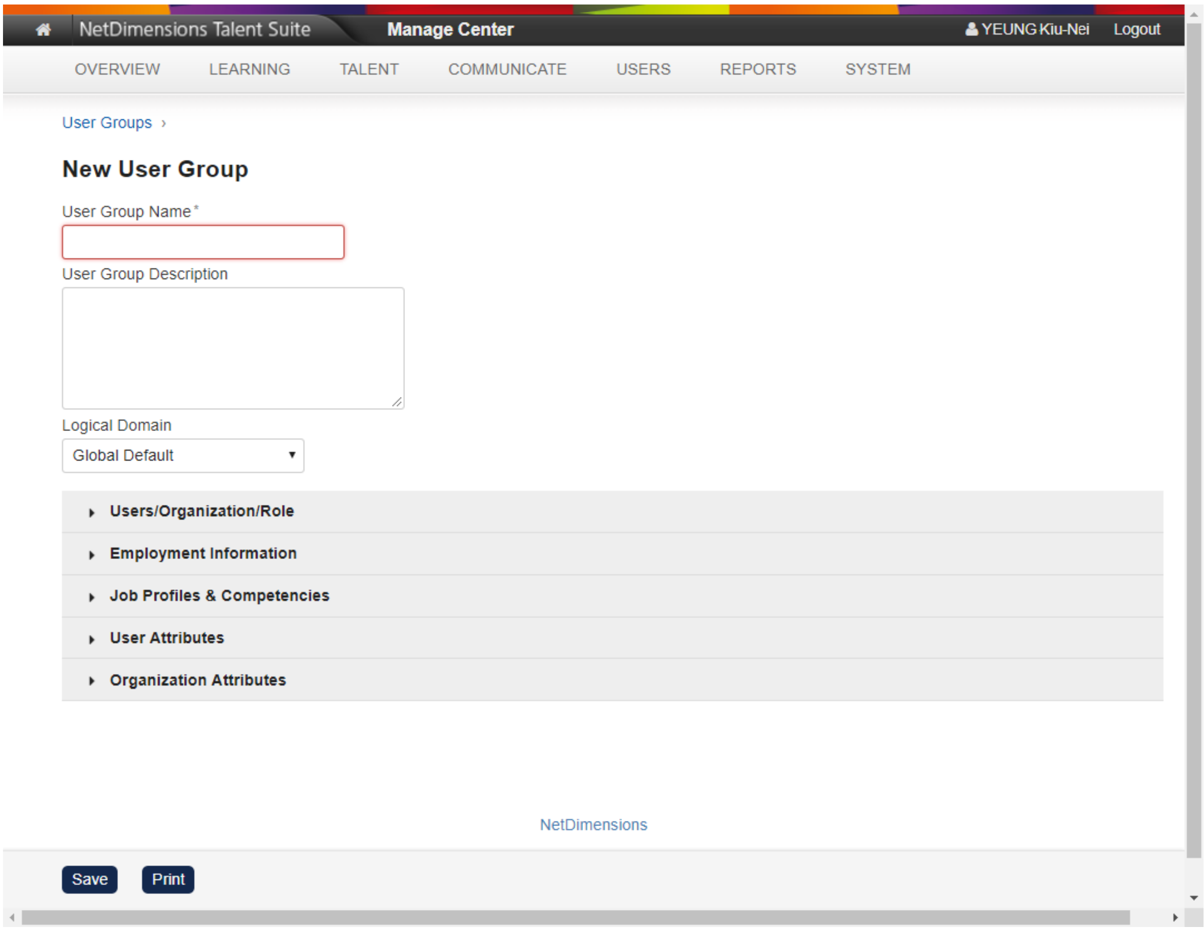


Selecting "View Members" for a specific group will open the "Users" page under "User Manager" with the list of users pre-filtered for the respective User Group. A breadcrumb will allow the administrator to return to the previous User Groups page.

Creating User Groups

When creating a User Group, you can specify:

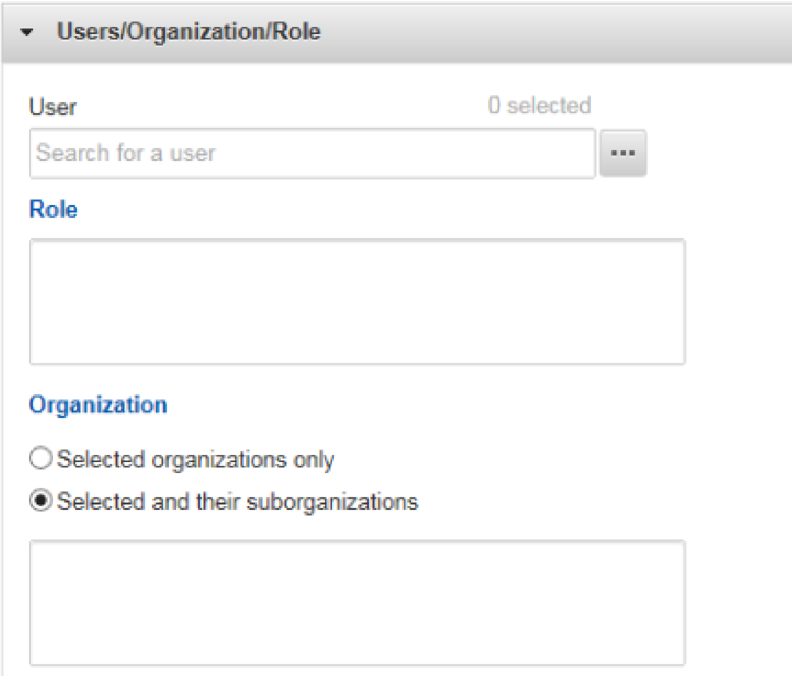
1. The User Group Name (required)
2. The User Group Description
3. The Logical Domain



There are five sets of criteria that can be used to specify which users should be members of the User Group:

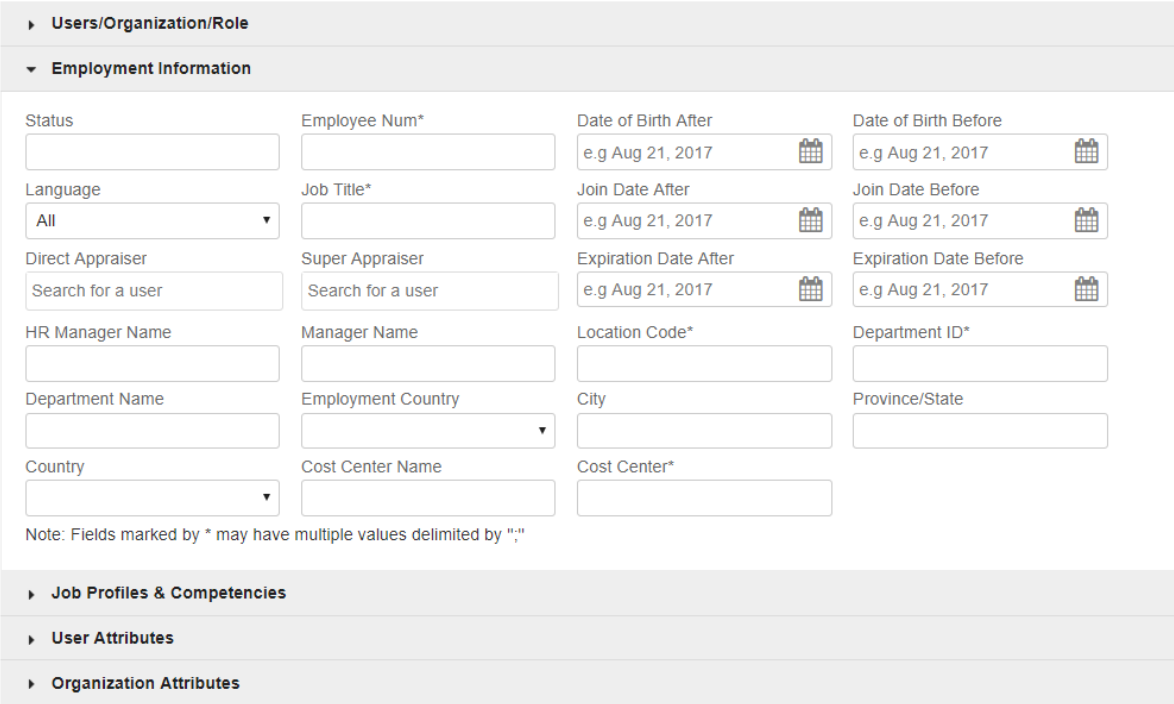
1. Users/Organization/Role
2. Employment Information
3. Job Profiles & Competencies
4. User Attributes
5. Organization Attributes

Users/Organization/Role


Users/Organization/Role
User
0 selected
Search for a user
Role
Organization
Selected organizations only
Selected and their suborganizations

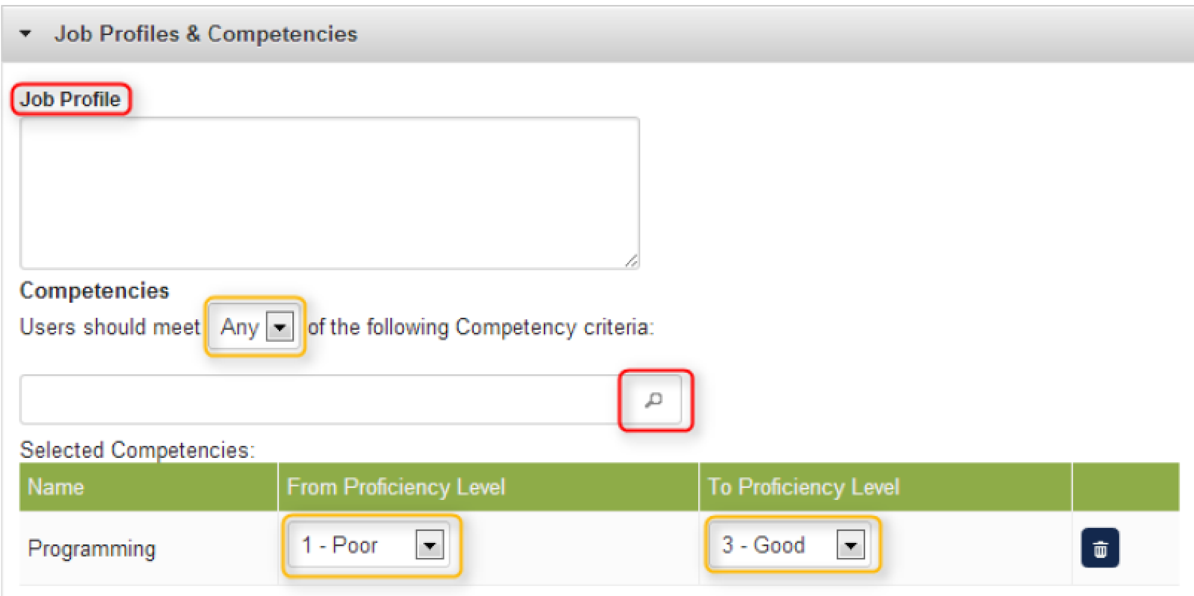
Employment Information

Criteria	Description
(User Account) **Status**	Status of the User Accounts
Employee Num *	Employee ID Numbers
Date of Birth After	With Dates of Birth after this date
Date of Birth Before	With Dates of Birth before this date
Language	Language used
Job Title *	Job Title
Join Date After	With Join Dates after this date
Join Date Before	With Join Dates before this date
Direct Appraiser	Direct Appraiser
Super Appraiser	Super Appraiser
Expiration Date After	With Expiration Dates after this date
Expiration Date Before	With Expiration Dates before this date
HR Manager Name	Name of the HR Manager
Manager Name	Name of the Manager
Location Code *	Location Code
Department ID *	IDof the Department
Department Name	Name of the Department
Employment Country	Countrywhere the employment is located
City	City
Province/State	Province / State
Country	Country
Cost Center Name	Name of the Cost Center
Cost Center *	Cost Center
Note: * *Multiple input values are allowed that need to be separated by ";".*	

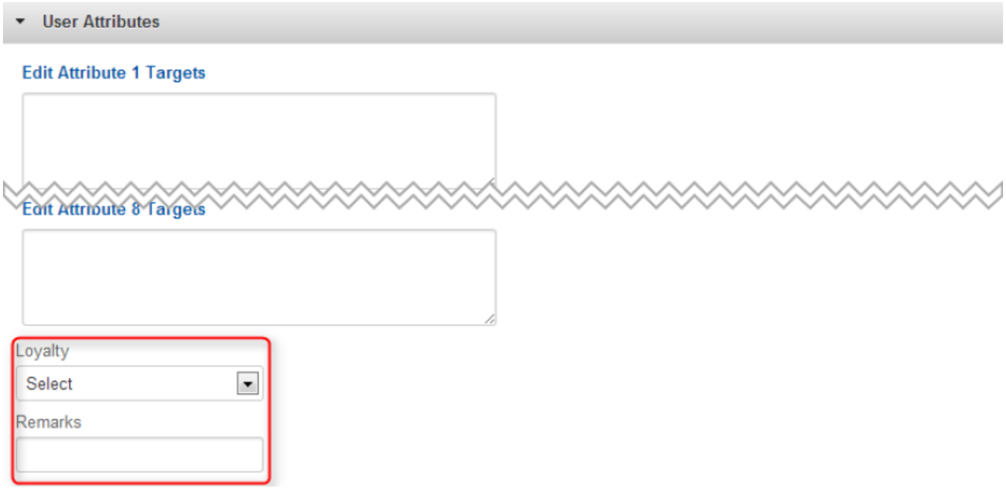


Job Profiles & Competencies

- The red highlight indicates selectors are available; the orange highlight shows that drop-down lists of options are available for competency criteria
- A User can select multiple job profiles & competencies criteria.
- For Job Profile criteria, the Users possessing any of the selected job profiles will be fetched.
- For competency criteria, there are several options. One can choose whether it is expected that Users will possess **All** or **Any** of the selected competencies.
- For each competency criterion, the Proficiency range level at which the target users attained can be specified.



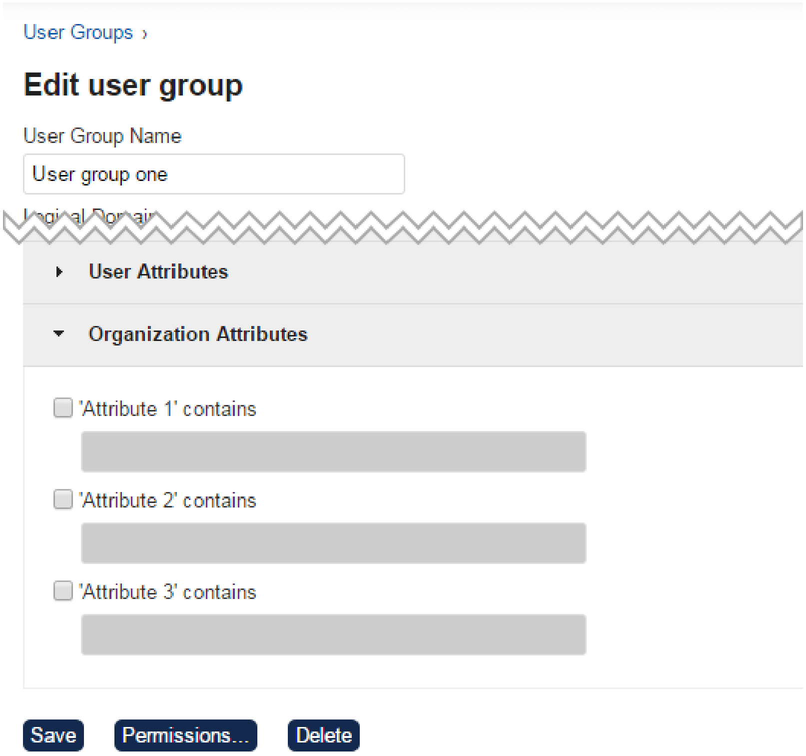
User Attributes



1. For backward compatibility, the Users are allowed to select multiple values in each criterion.
2. The red highlight shows the **User Attribute Extension**(s) visible to the User.
3. This section will look the same as that in the User Selector, except the previous attribute criteria allows multiple values.

Organization Attributes

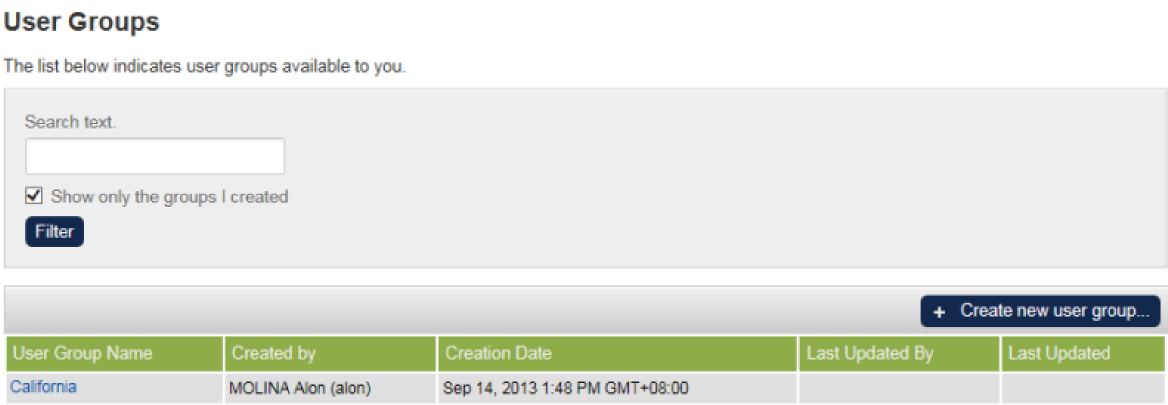
The Administrators can select organizational attributes as targets, meaning the Users belonging to an organizational level that has one of these attributes are to be evaluated as members in that User Group.
This can be done in the User Group editor, under the Organization Attributes section.



Editing User Groups

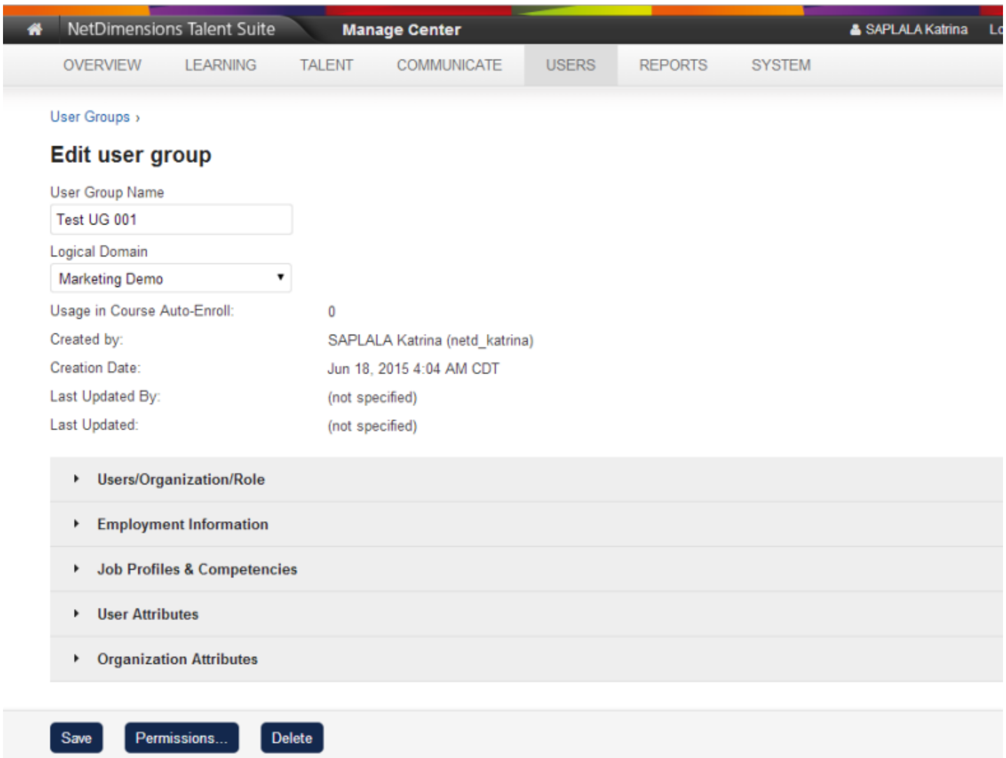
1. Go to **Manage Center** > **USERS** > **GROUP AND ORGANIZATION** > **User Groups**.

2.The *User Groups* page appears. Click the User Group you want to modify.



Note: Unchecking the "**Show Only The Groups I Created**" will display the groups that were not created by the User.

3.The *Edit User Group* page will appear. The User Group details can be modified, including the five exp anable lists discussed in the previous section.

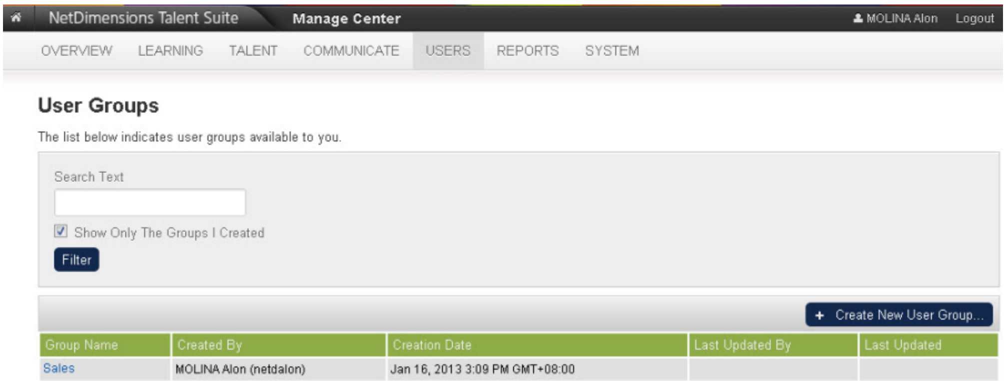


4. Click **Save** confirm the changes.

Deleting User Groups

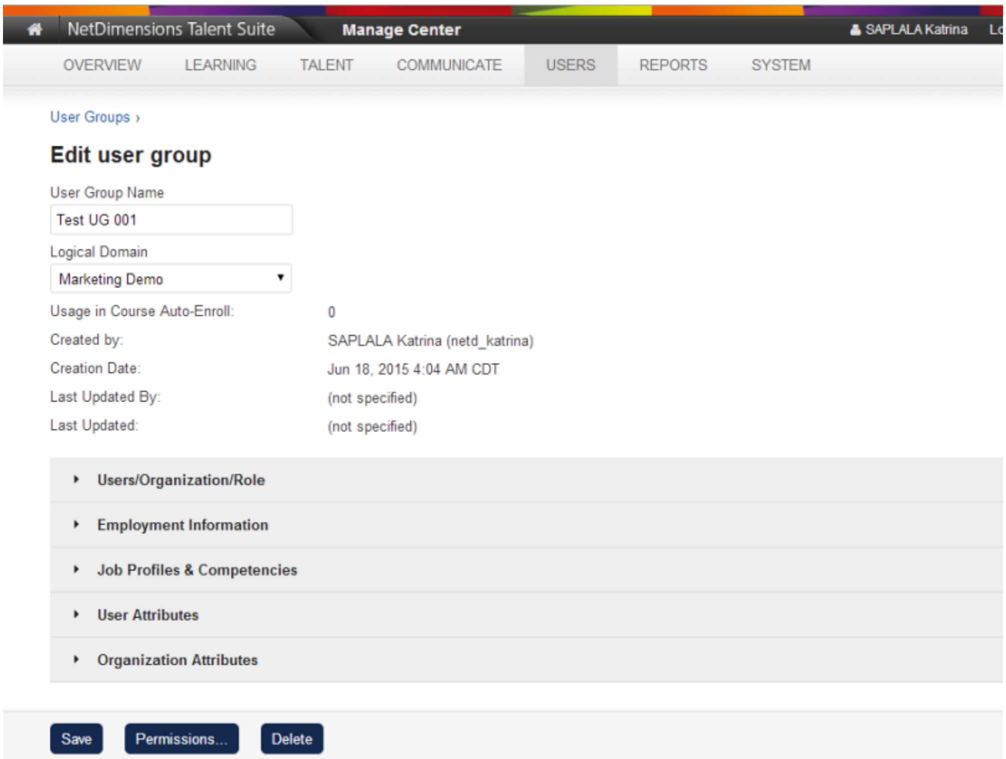
1. Go to **Manage Center** > **USERS** > **GROUP AND ORGANIZATION** > **User Groups**.

2.The *User Group* page appears. Click the user group you want to remove



Note: Unchecking the "**Show Only The Groups I Created**" will filter out the groups that were not created by the user.

3.The *Edit User Group* page appears. Click the **Delete** button.



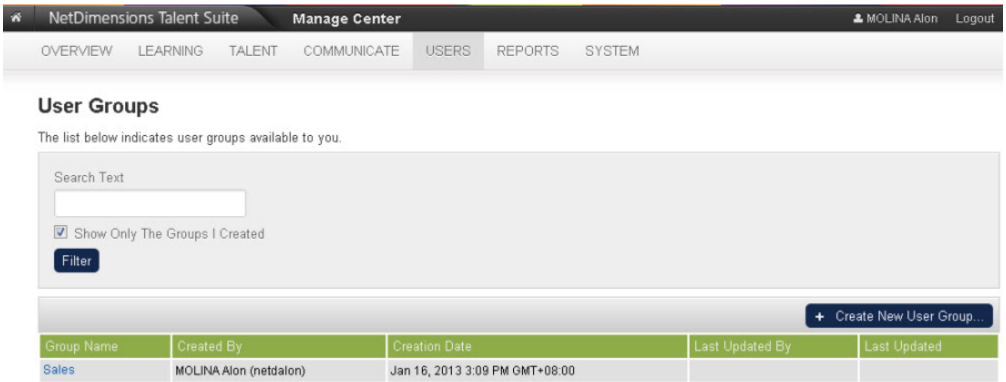
4.A confirmation dialog box appears. Click **OK**. The *Edit User Group* page refreshes to reflect the change.

User Group Permissions

A user can include/exclude child organizations in "Organization" criteria when creating user groups.

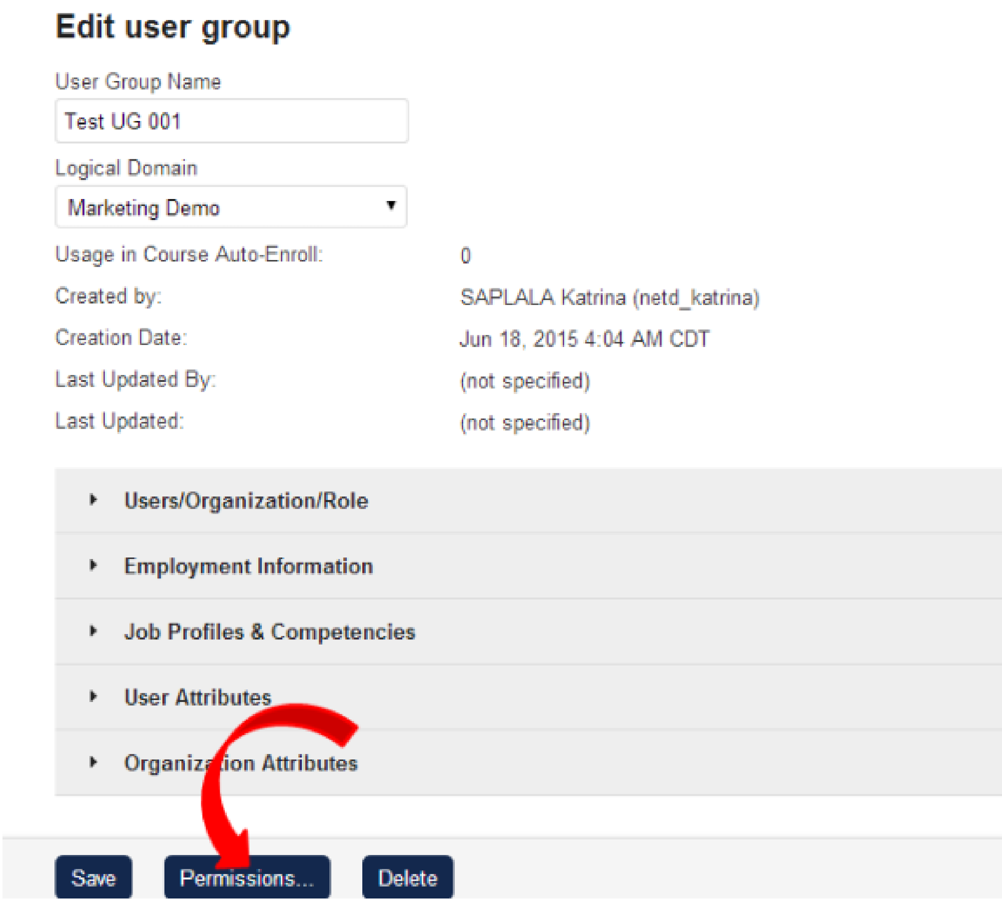
1. Go to **Manage Center** > **USERS** > **GROUP AND ORGANIZATION** > **User Groups**.

2.The *User Group* page appears. Click the user group whom the permission will be set.

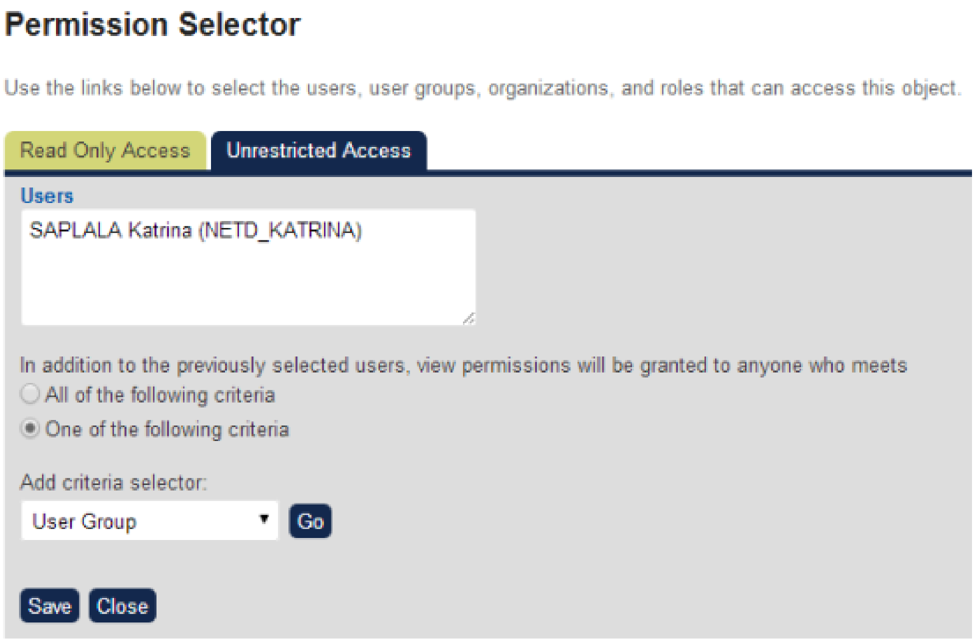


Note: Unchecking the "**Show Only The Groups I Created**" will filter out the groups that were not created by the user.

3.The *Edit User Group* page appears. Click the **Permission** button.



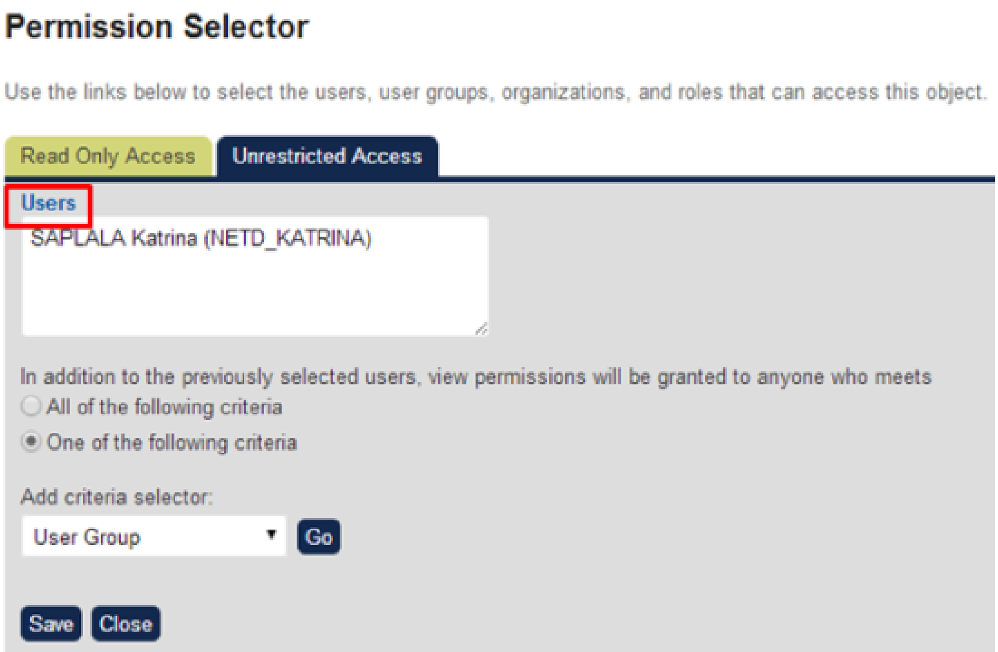
4.The Permission Selector page appears. From here, you can now configure the permission of the user group.



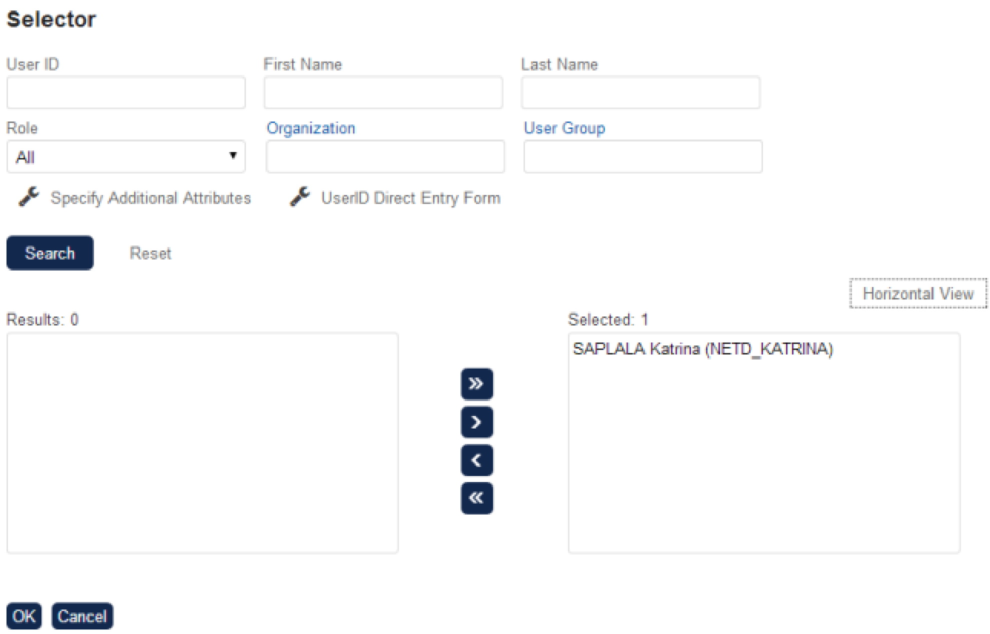
- Select first the type of access you want to give to the user. There two types of access you can give to a user, namely;

  a. Read Access
  b. Write Access

- After selecting the access type, you can now select the user(s) to whom the access permission will be granted. Click the **Users** link.

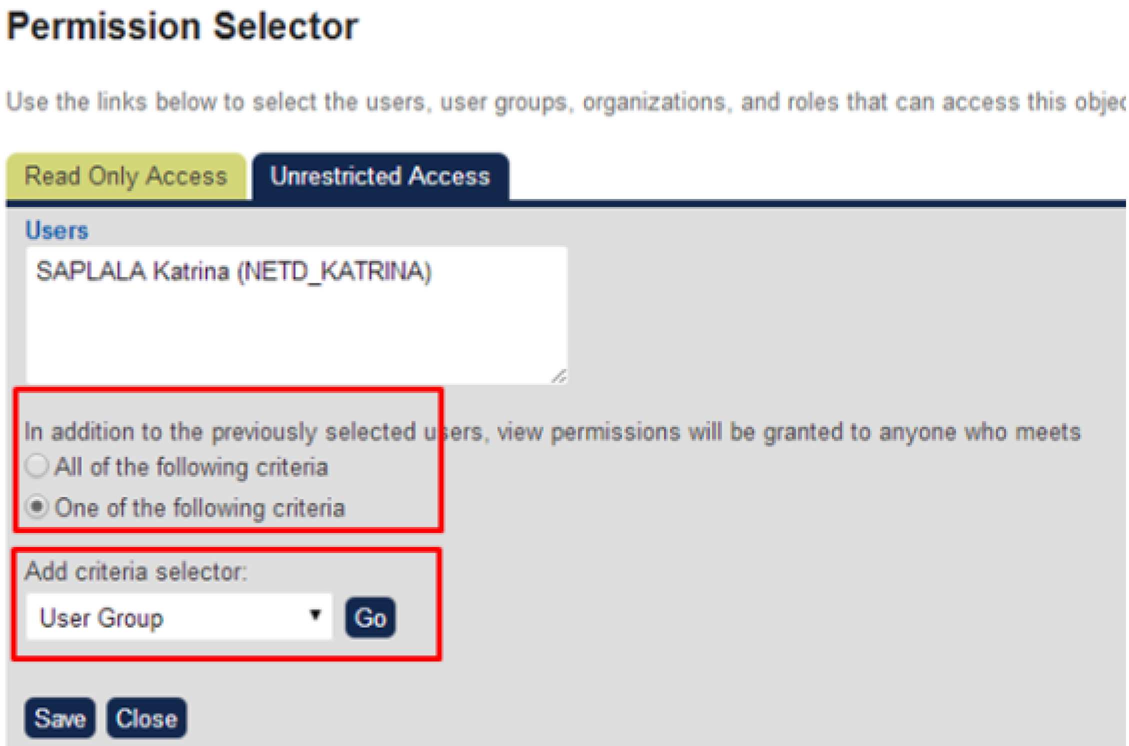


5.This opens the *User Selector* screen to select a specific user or group of users.



6.Once assigning and setting the permission is completed, click the Save button to save the settings.

7.In addition to the selected users, view permission can also be granted to anyone who meets the following criteria:



- **All of the following criteria**

This means that viewing permission can be granted to users belonging to ***all*** the criteria defined in the *Add Criteria selector*.

- **One of the following criteria**

This means that viewing permission can be granted to users belonging to ***any*** of the criteria defined in the *Add Criteria selector*.

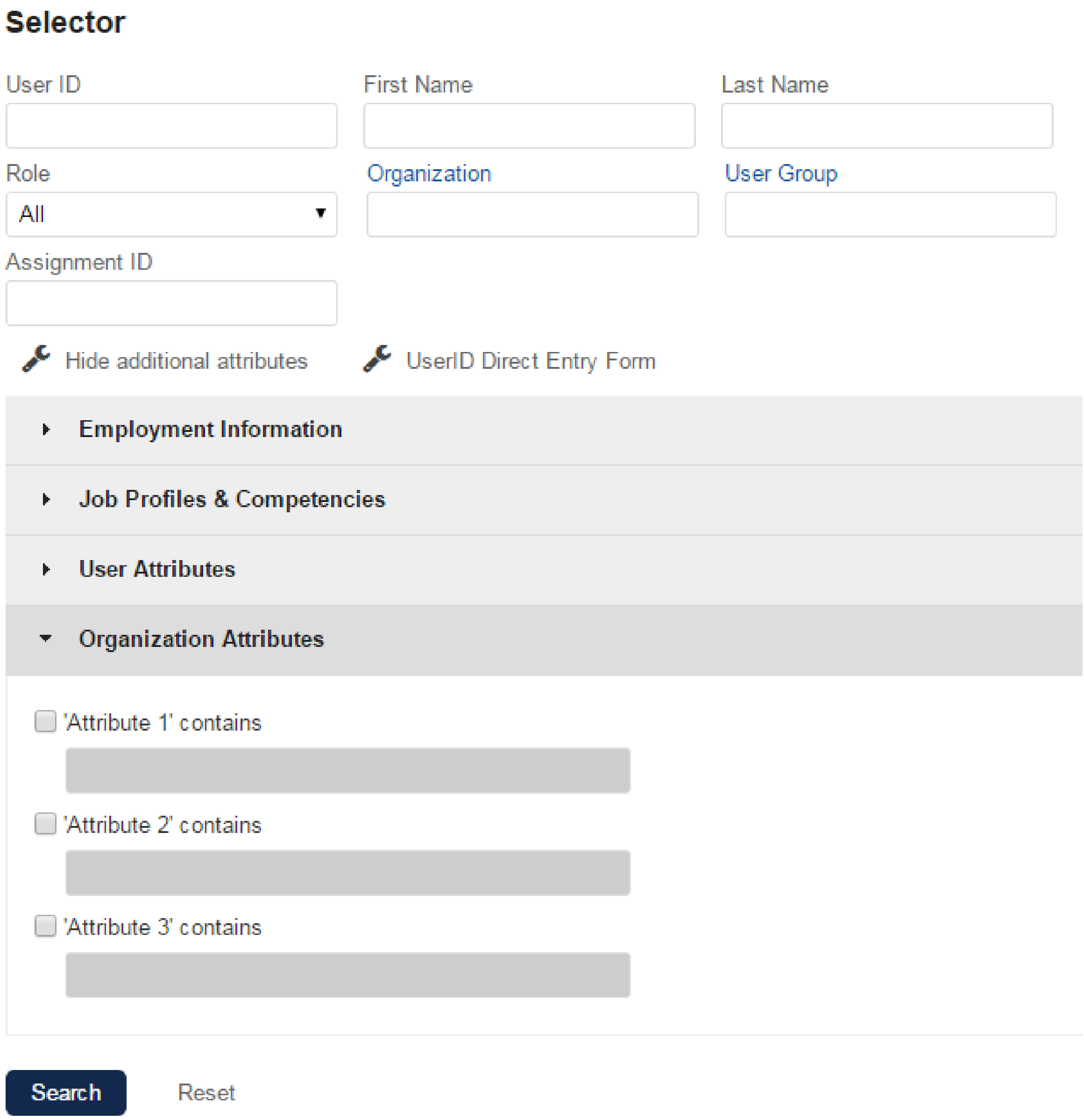
- **Add criteria selector**

This allows you to add criteria by selecting from the list in the dropdown menu and select the preferred criteria.

Note: For every selected criterion, a criterion box will appear. To select a specific user, group or organization that belongs to the criteria, click the link positioned at the right top of each box. See the procedure in the Appendix section on how to select a user, group or an organization.

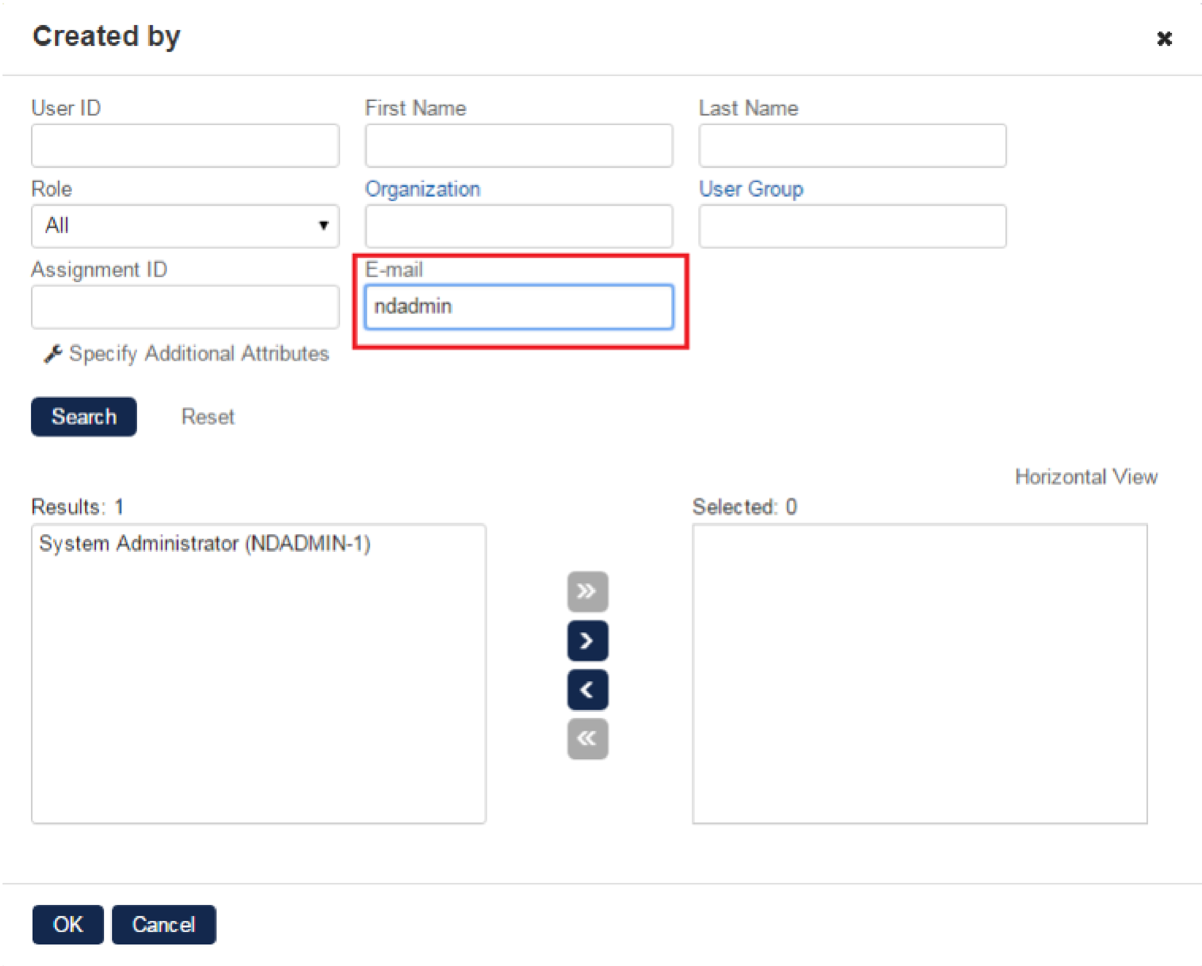
Organization Attribute Criteria in User Selector

By the same token, Administrators can specify organizational attributes as criteria when looking up users in **User Selector > Organization Attributes**



E-Mail Address Filter in User Selector

In the standard User selector, a user can be searched by several user profile fields but not by the e-mail address. For course Administrators, especially located in other offices, it is often difficult to find the correct user if there are users with the same name or having special characters in their names. In a lot of cases, the Administrators may only have information about the user name and their e-mail address but not the other information about the user. Having the e-mail address as a search option is quite helpful especially the e-mail address could perhaps be the unique identifier for a person beside the user ID for the most common cases.

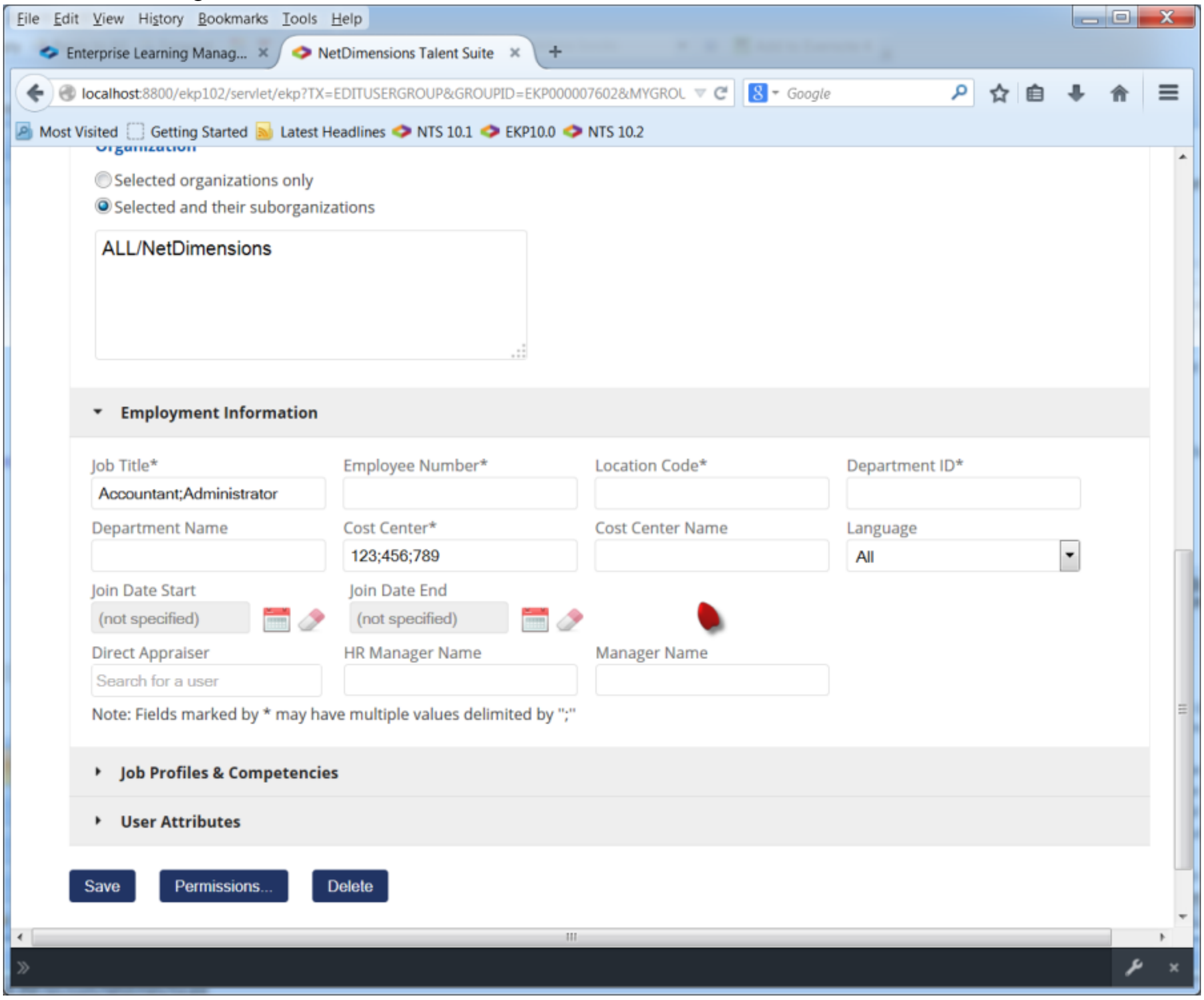


Multiple Value Entry for Employment Information Selection Criteria

Several fields that are part of the standard Employment Information category now offer support for multiple values when used as selection attributes in User Group membership criteria, course Auto-Enroll criteria, and Job Profile Assignment functions. These fields are:

- Job Title
- Employee Number
- Location Code
- Department ID
- Cost Center

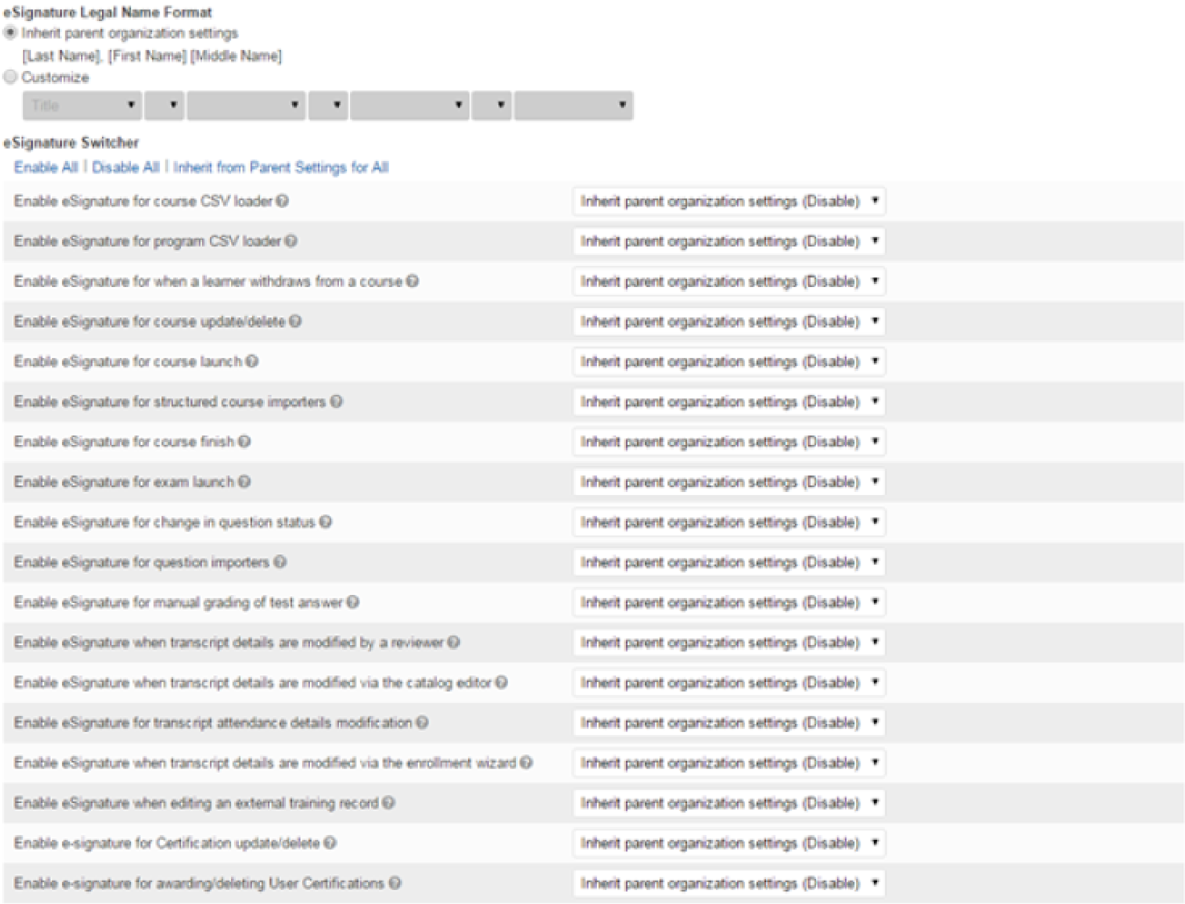
On the Employment Information form these are marked with an "*" indicating that a semi-colon may be used to delimit multiple values. If multiple semi-colons are entered with no value (e.g. "abc;;;xyz") the blank items are ignored.



e-Sign Required Dependent on Learner Organization

To extend from E-Signature configurations being available for the Root level of the organization structure, these configurations are configurable at all levels. Some e-signature requirements are now evaluated on the learner's organization setting and not the person performing the action. The figure below shows the e-signature configuration section under **Manage Center > Users > Group and Organization > Organization Maintenance**. For each of the e-signature type, there are three possible options:

- Inherit parent organization settings
- Enable
- Disable

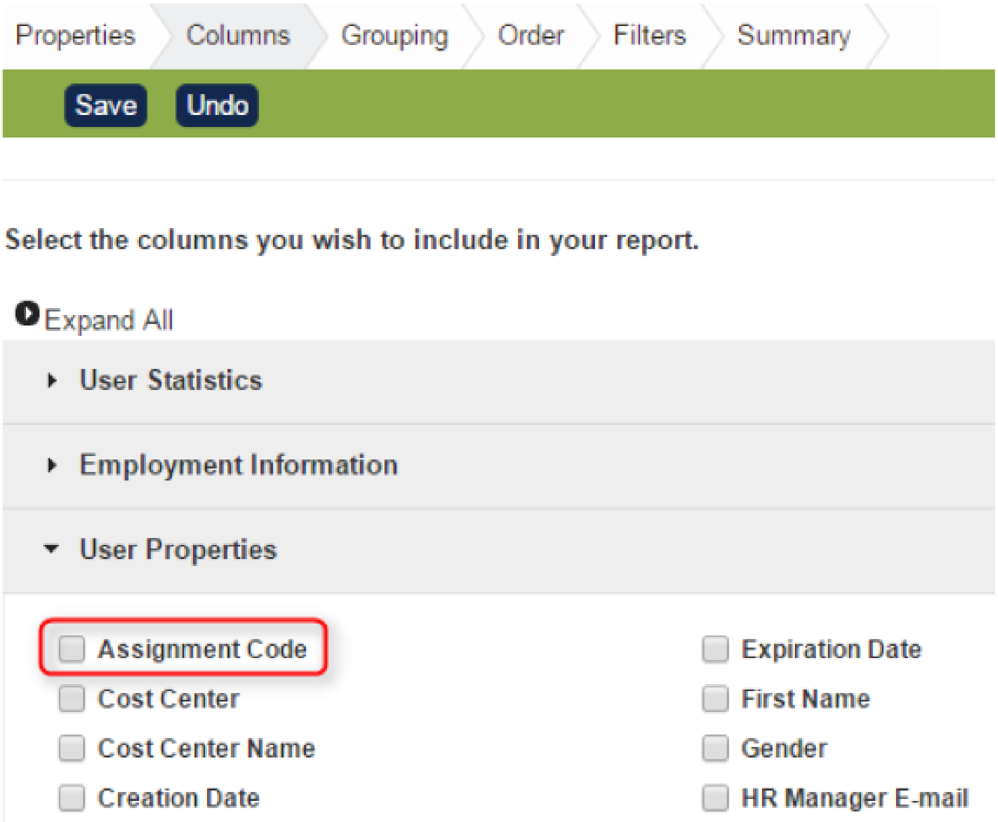


If the "Inherit parent organization settings" option is selected, the parent settings (i.e. enable/disable) is shown in the parenthesis. The popup display of e-signature prompt will depend on the learner's organization setting and not the logged-in user's for the following configurations:

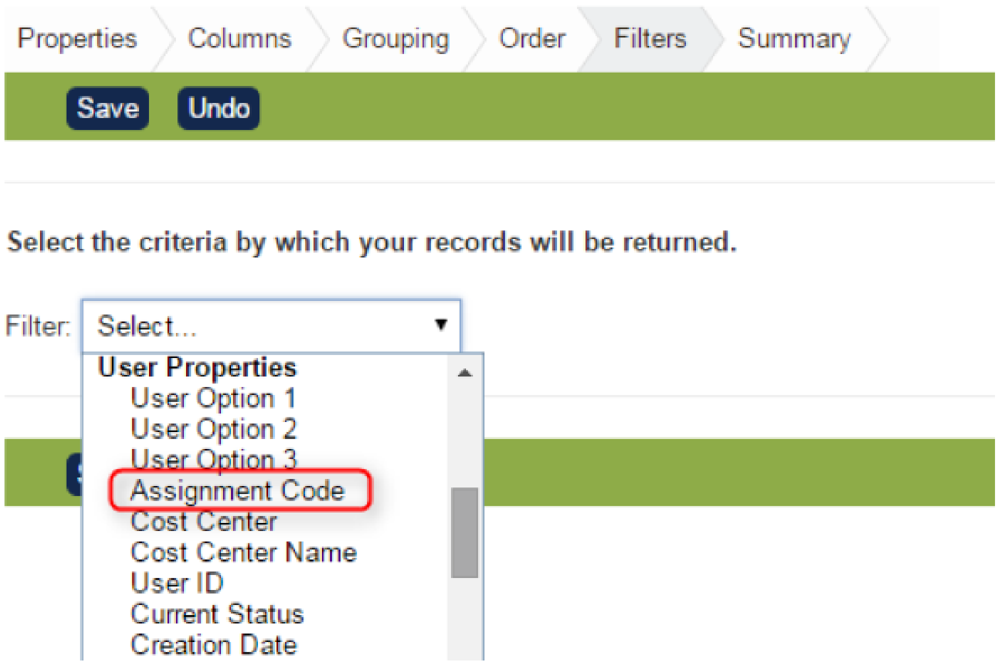
- Enable e-signature when a learner withdraws from a course
- Enable e-signature when transcript details are modified by a reviewer
- Enable e-signature when transcript details are modified via the catalog editor
- Enable e-signature for transcript attendance details modification
- Enable e-signature when transcript details are modified via the enrollment wizard
- Enable e-signature when editing an external training record
- Enable e-signature for awarding and deleting user certifications
- Enable e-signature for structured course importers
- Enable e-signature for course finish

Assignment Code Available in Report Wizard

When the multiple assignment feature is enabled, a new column "Assignment Code" column is available in the "User Properties", "Direct Appraiser" and "Instructor information" sections.

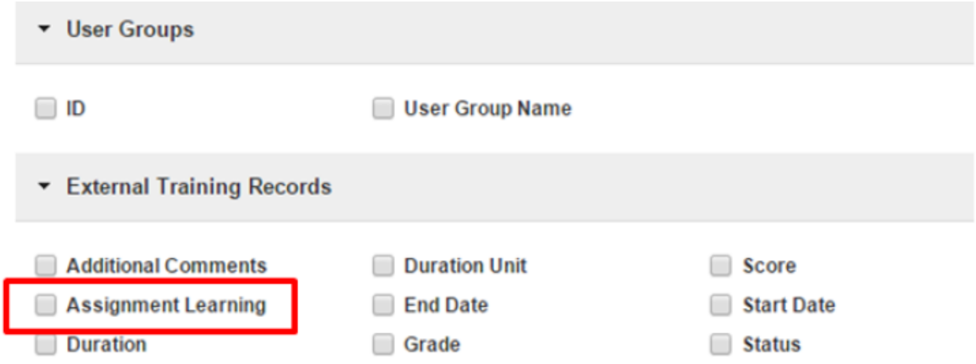


The "Assignment Code" column can be used as a filter.

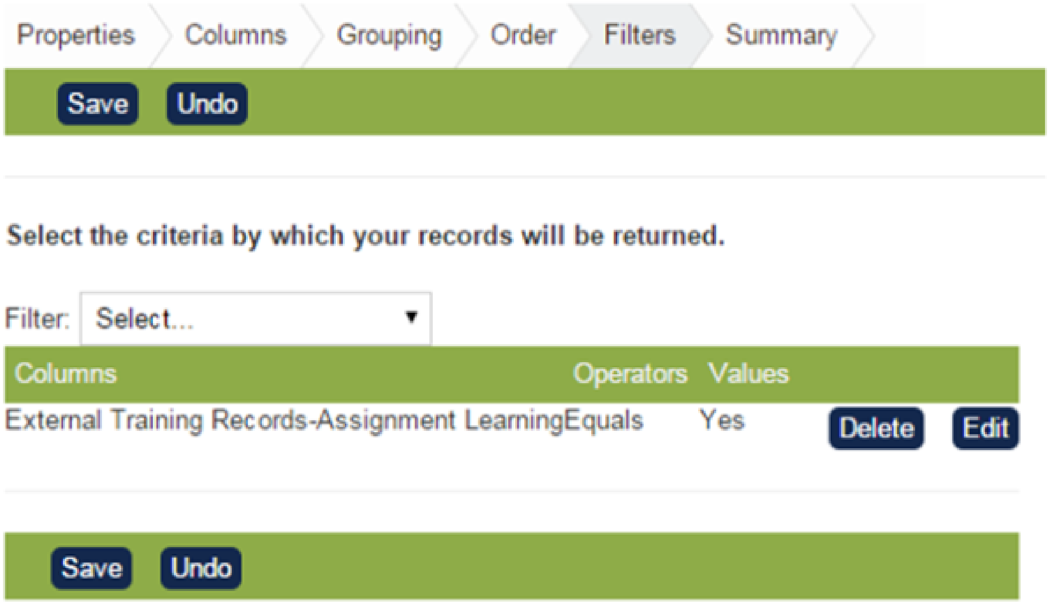


Aggregate Training Across Assignments in Report Wizard

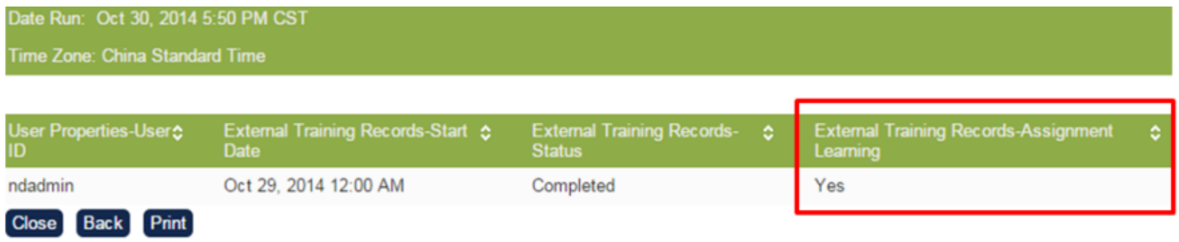
If the Multiple Assignment feature is enabled, the Report Wizard allows you to determine whether the transcript is owned by the assignment. The figure below shows the new "Assignment Learning" column under External Training Record. The option is only available if you have turned on the Multiple Assignment feature.



Under the Filters, you can specify filtering by the Assignment Learning column to be equal to "Yes" or "No".



Run the report at the Summary step. The report will aggregate training records across assignments. In the example below, when the transcript is completed by the user "ndadmin", it will display "Yes" under the assignment learning column. If it is completed by another assignment of "ndadmin", it will display "No".



Beside the External Training History report, the following reports also aggregate transcripts across assignments:

- Training History
- Courseware Information
- Learning Program Detail
- Exam Results

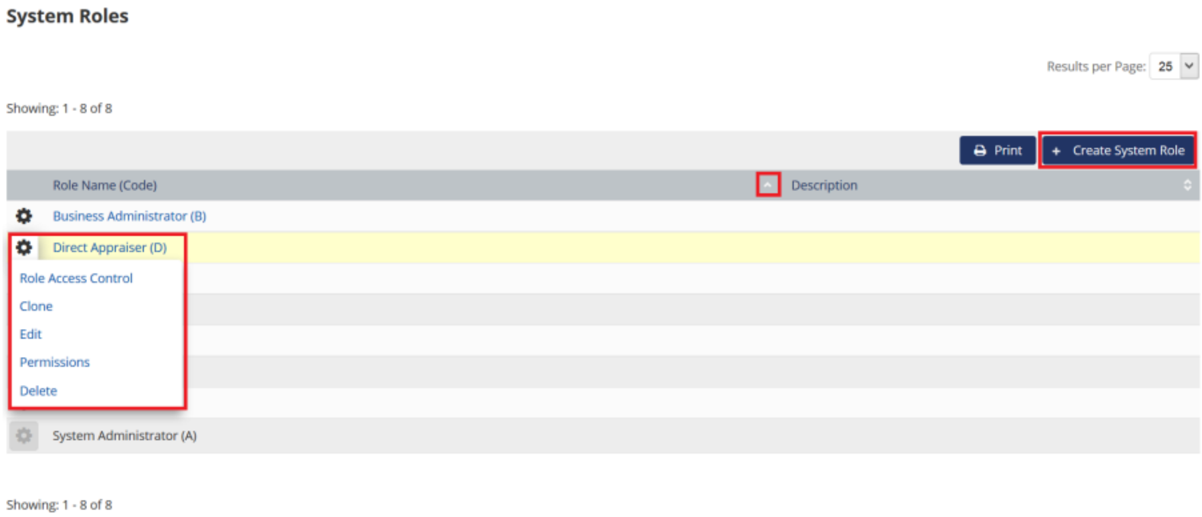
- Certification History

User Management

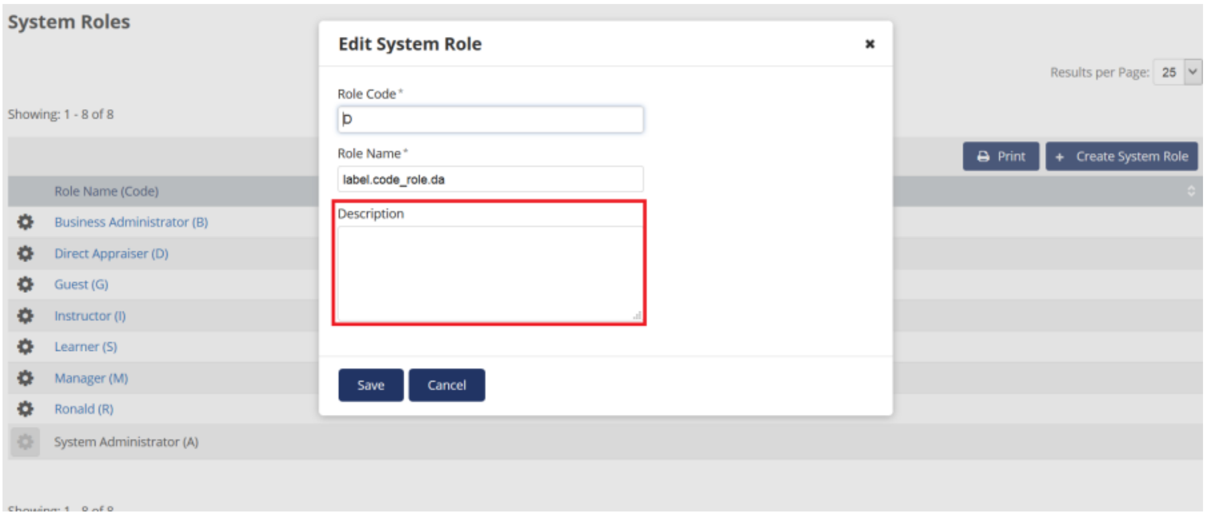
Managing user data is a common task for most Administrators and a lot of effort is spent on doing maintenance. The following sections below aids Administrators in performing these tasks:

Manage System Roles Screen

Each user is at least tagged with a role on the system. On a global system, there could be roles set up that are region-specific. A table format manages the list of configured system roles easily. This screen also comes with the standard layout with pagination, column sorting (description) and gear actions to act on a specific role. The gear options include a quick menu link to edit the role access settings of the role, clone, edit, delete or set permissions on it.



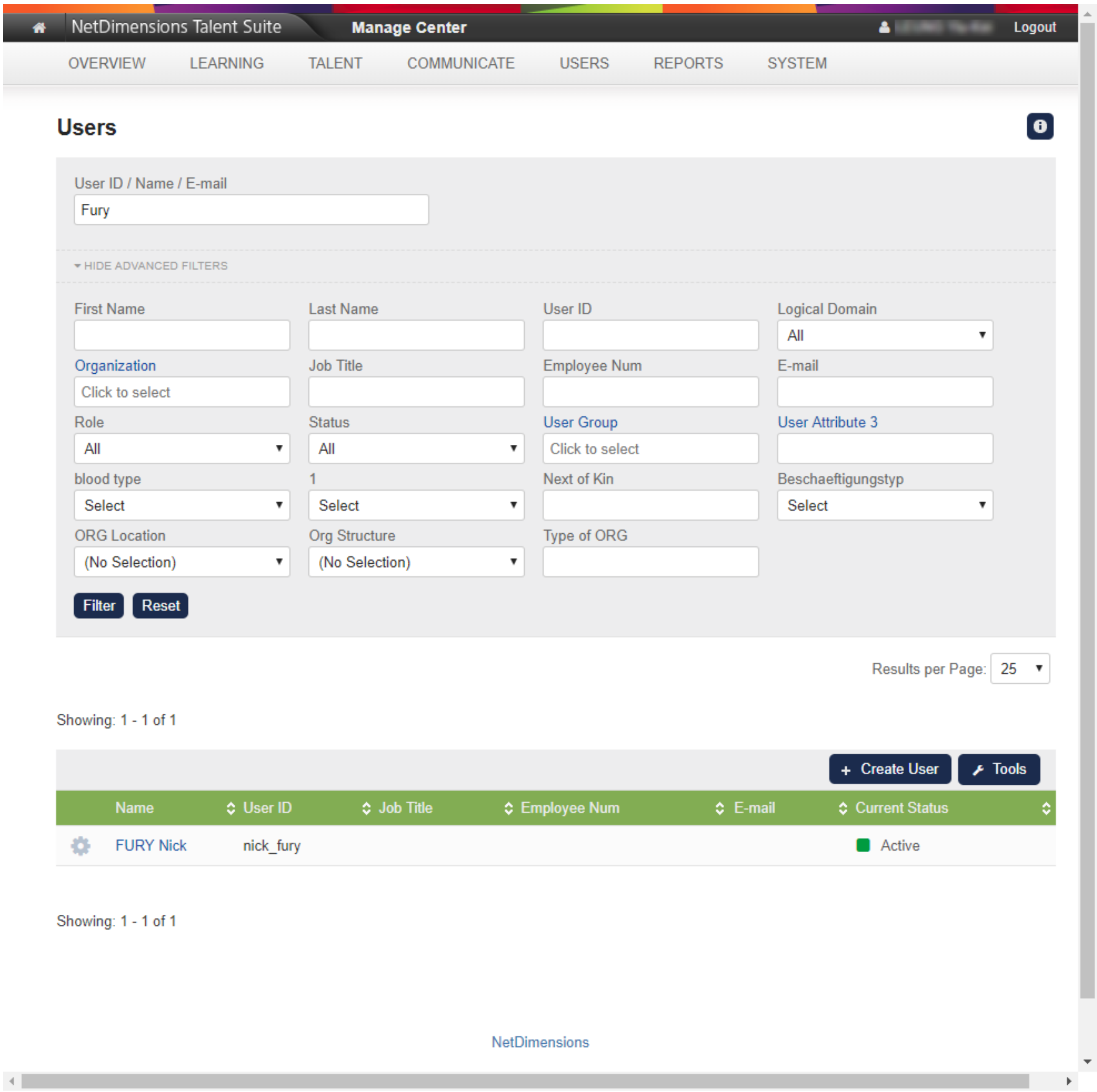
For the creation, editing and cloning actions, a dialog pops up to ask for the role code, role name and a new field to hold the description information. Often there is a need to have the ability to store a few lines describing the role, thus serving as a reference for other Administrators who can't distinguish the meaning of the role by just looking at the name or code. The quick menu link to get to the role access settings of the role will facilitate the configuration instead of having to find the separate menu to get to that screen.



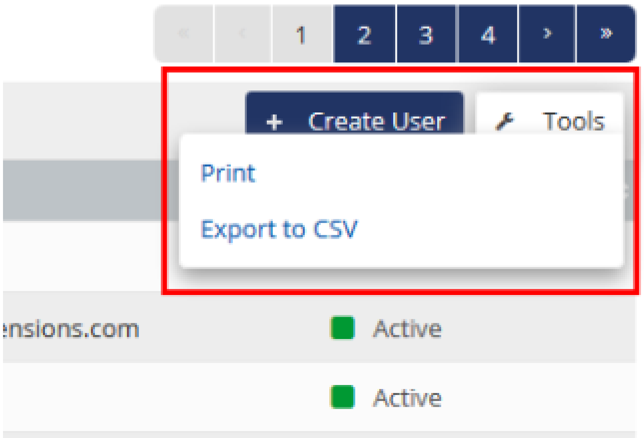
Manage Users Screen

For easier user management, the **User Editor > User Search** screen features a standard filter format. The page includes these features:

- Pagination
- Sortable columns
- Gear actions (View/Edit Profile, Delete User Data, Review Transcripts, Change Status, Reset Password, Export Personal Data)
- User creation button



- Printing of the current results
- CSV format exporting of the search results



Some access rights and menus were renamed while revamping the screen are as follows:.

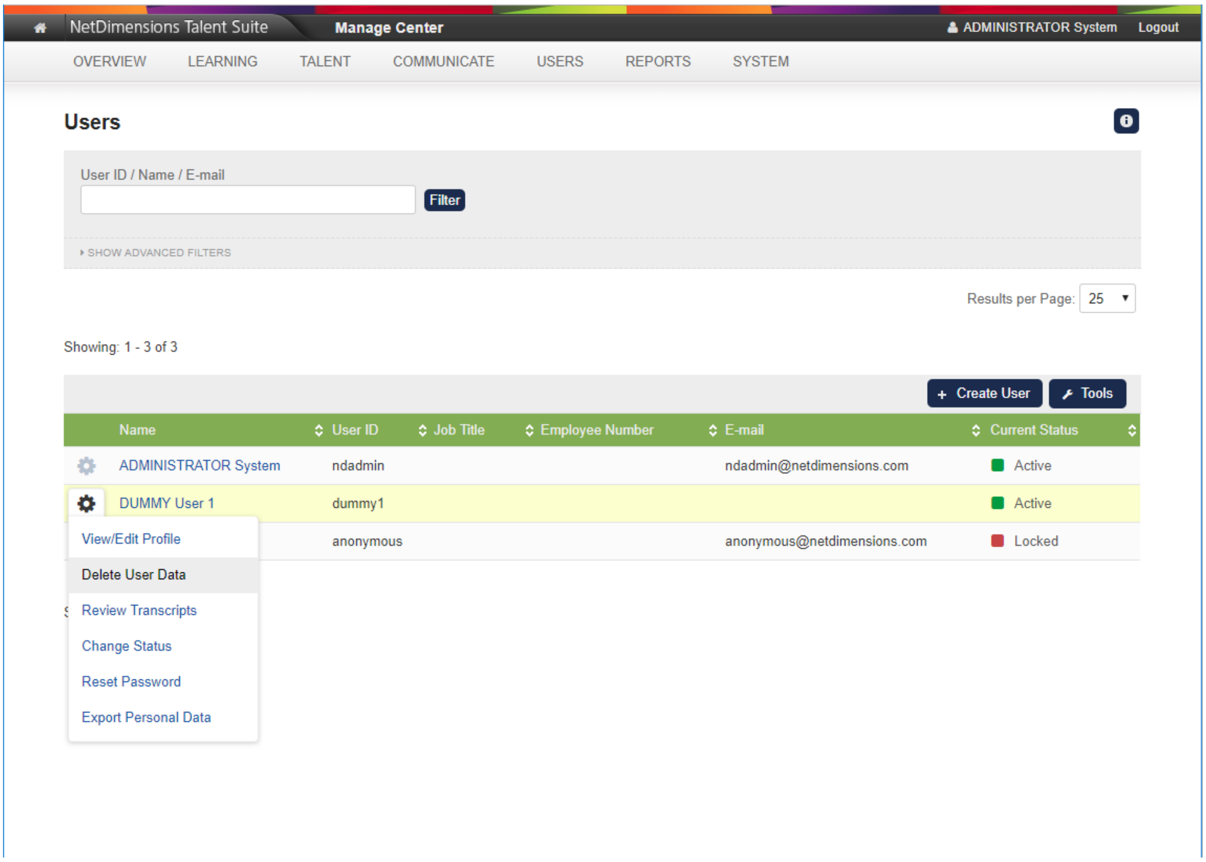
- "User Editor" access right is now "Users"
- "Users" menu group is now "User Manager"
- "User Editor" is menu item now "Users"

The page now requires the following access rights:

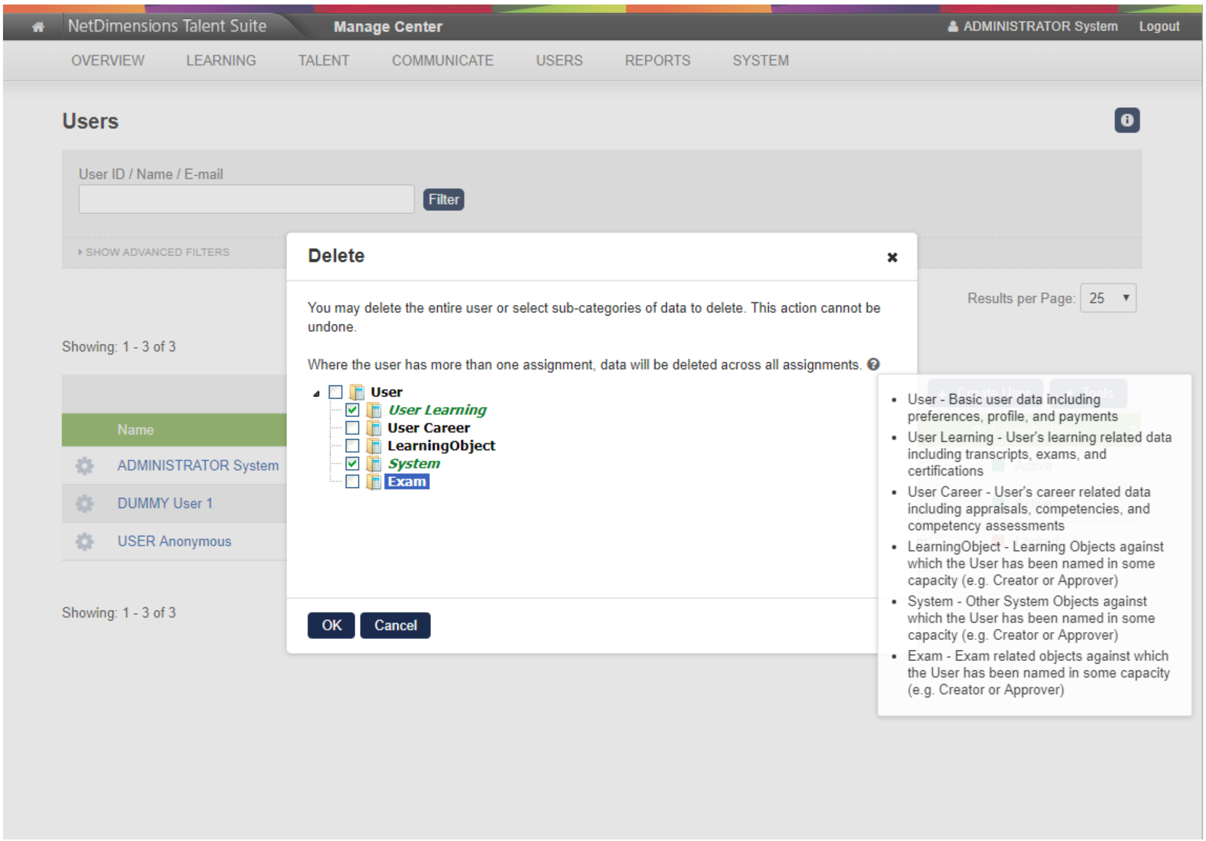
- "User Manager" + "Users" - to display the page
- User Creation - to display the Create Button
- User Deletion - to display the Delete Button

Deleting Personal Data by Category

Administrators can opt to delete only the records within the selected categories of a user's personal data by clicking "Delete User Data".

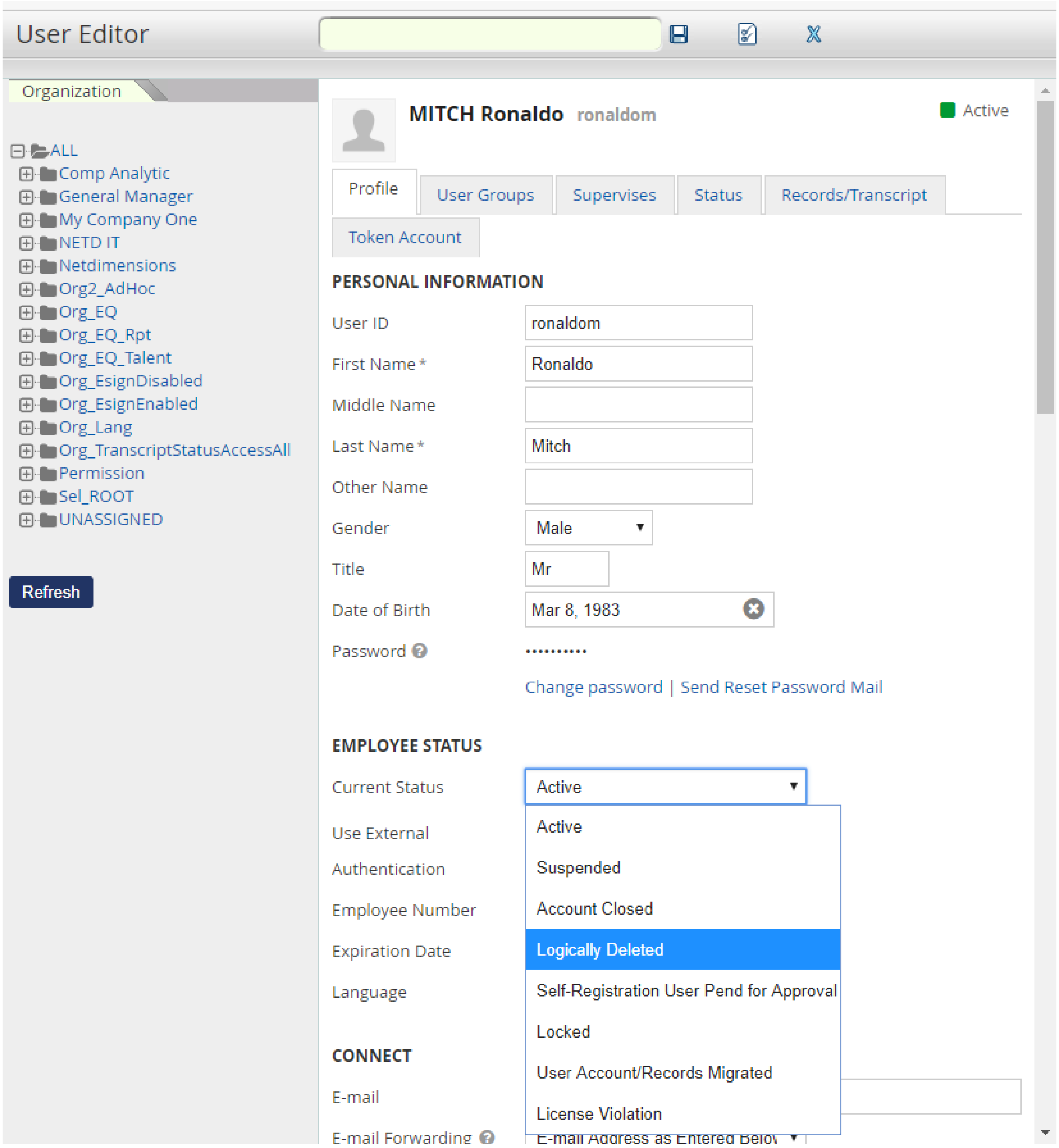


All categories will be checked by default.


NetDimensions Talent Suite
Manage Center
ADMINISTRATOR System
Logout
OVERVIEW
LEARNING
TALENT
COMMUNICATE
USERS
REPORTS
SYSTEM
Users
User ID / Name / E-mail
Filter
SHOW ADVANCED FILTERS
Showing: 1 - 3 of 3
Name
ADMINISTRATOR System
DUMMY User 1
USER Anonymous
Showing: 1 - 3 of 3
Results per Page: 25
Delete
You may delete the entire user or select sub-categories of data to delete. This action cannot be undone.
Where the user has more than one assignment, data will be deleted across all assignments.
User
User Learning
User Career
LearningObject
System
Exam
OK
Cancel
User - Basic user data including preferences, profile, and payments
User Learning - User's learning related data including transcripts, exams, and certifications
User Career - User's career related data including appraisals, competencies, and competency assessments
LearningObject - Learning Objects against which the User has been named in some capacity (e.g. Creator or Approver)
System - Other System Objects against which the User has been named in some capacity (e.g. Creator or Approver)
Exam - Exam related objects against which the User has been named in some capacity (e.g. Creator or Approver)

Logically Deleting Users

Users can be temporarily deleted from the system using the "Logically Deleted" User Account Status on the User Page or in the User Editor:

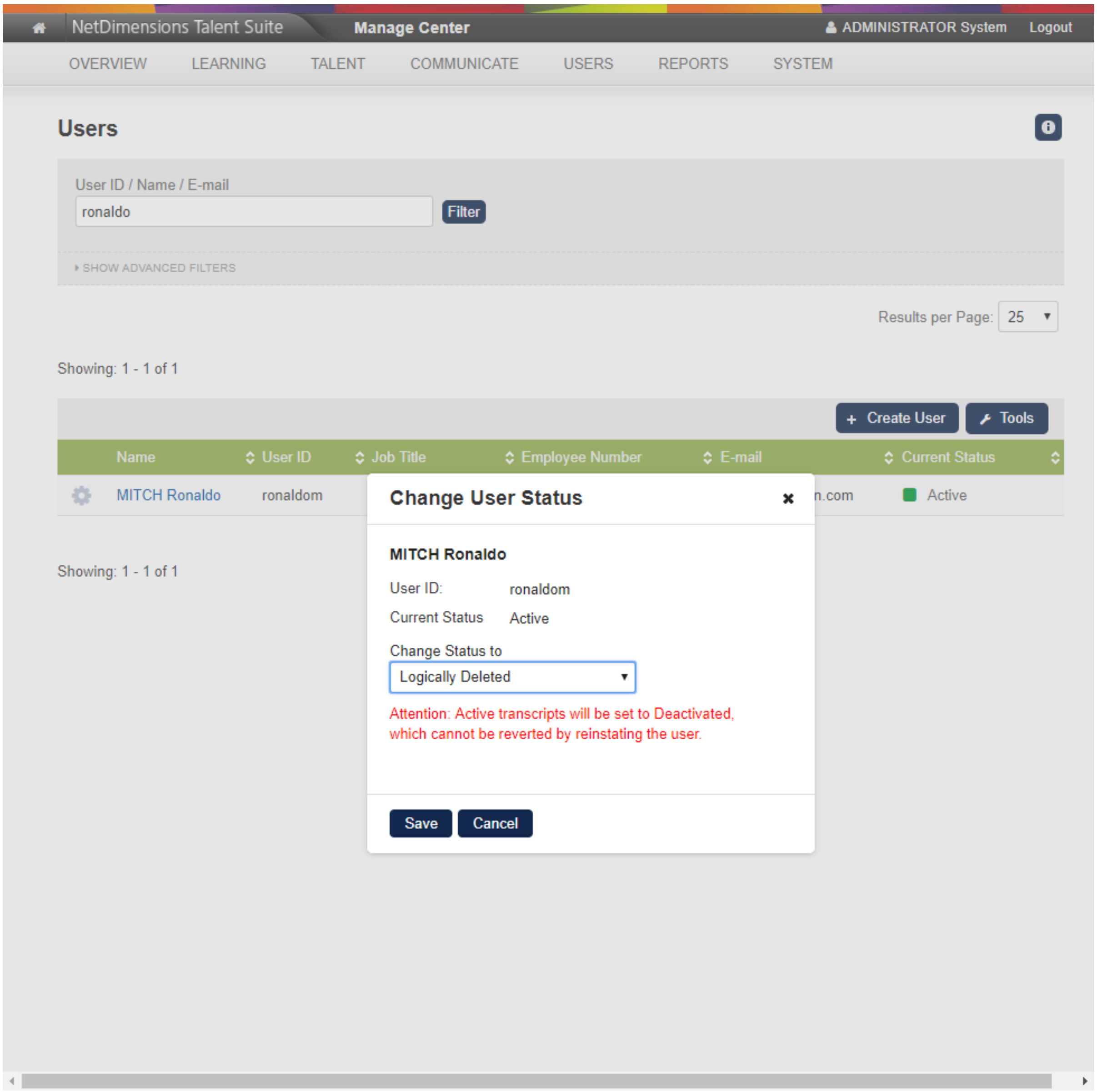


The "Logically Deleted" status can also be set for users in bulk using the User Data Loader. User accounts in this status will not be reported on or selectable via the User Interface. As part of the GDPR compliance, administrators may set User Accounts to this status in the following scenarios:

1. When data processing needs to be temporarily suspended for the given accounts
2. On receiving a user's request to withdraw Terms of Use Acceptance (where relevant/applicable)
3. When users have failed to accept the Terms of Use Acceptance within a reasonable amount of time (where relevant/applicable)

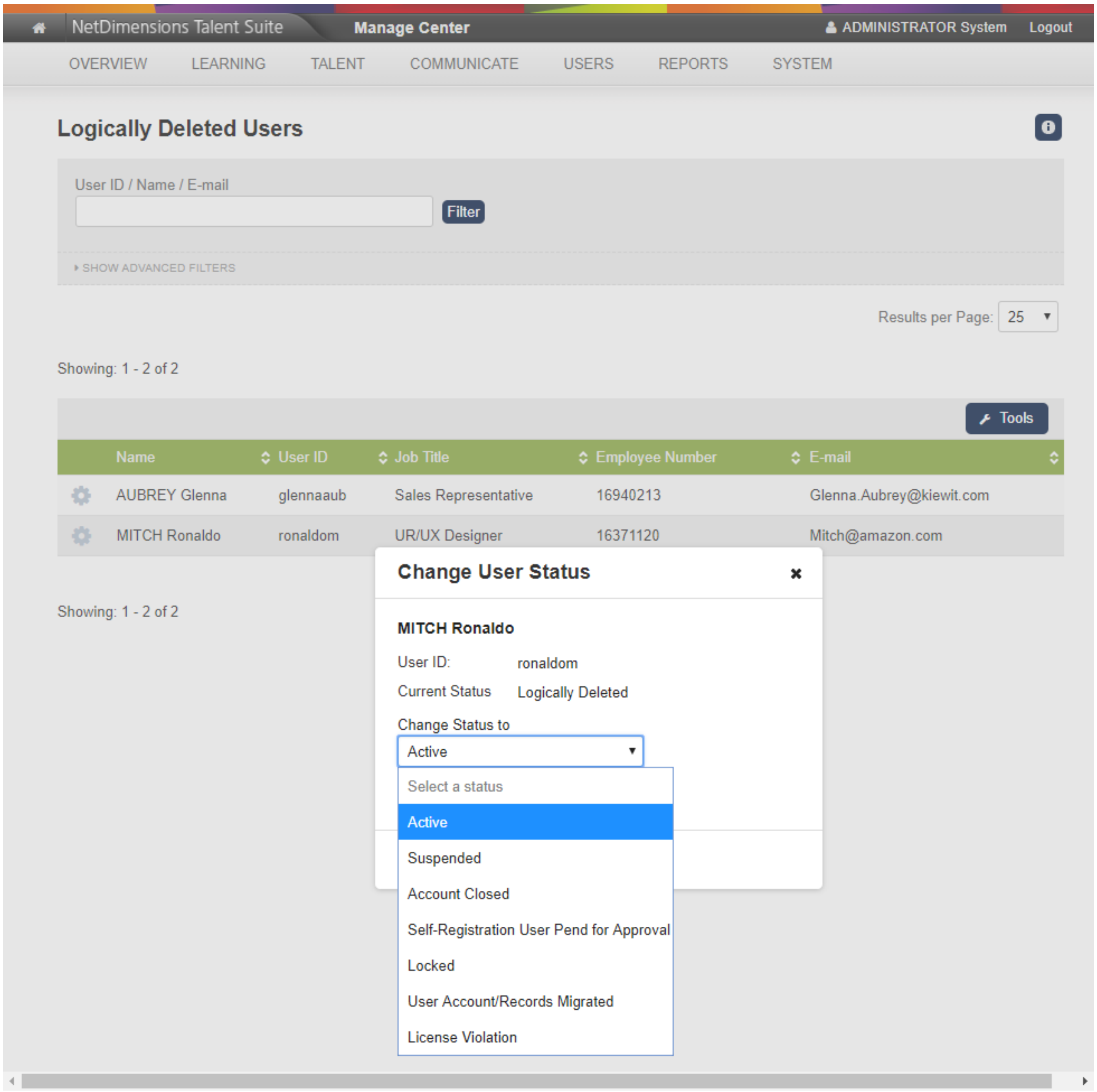
Transcript Deactivation

When logically deleting users, the transcripts of the Logical Deleted Users will be automatically deactivated upon deletion:



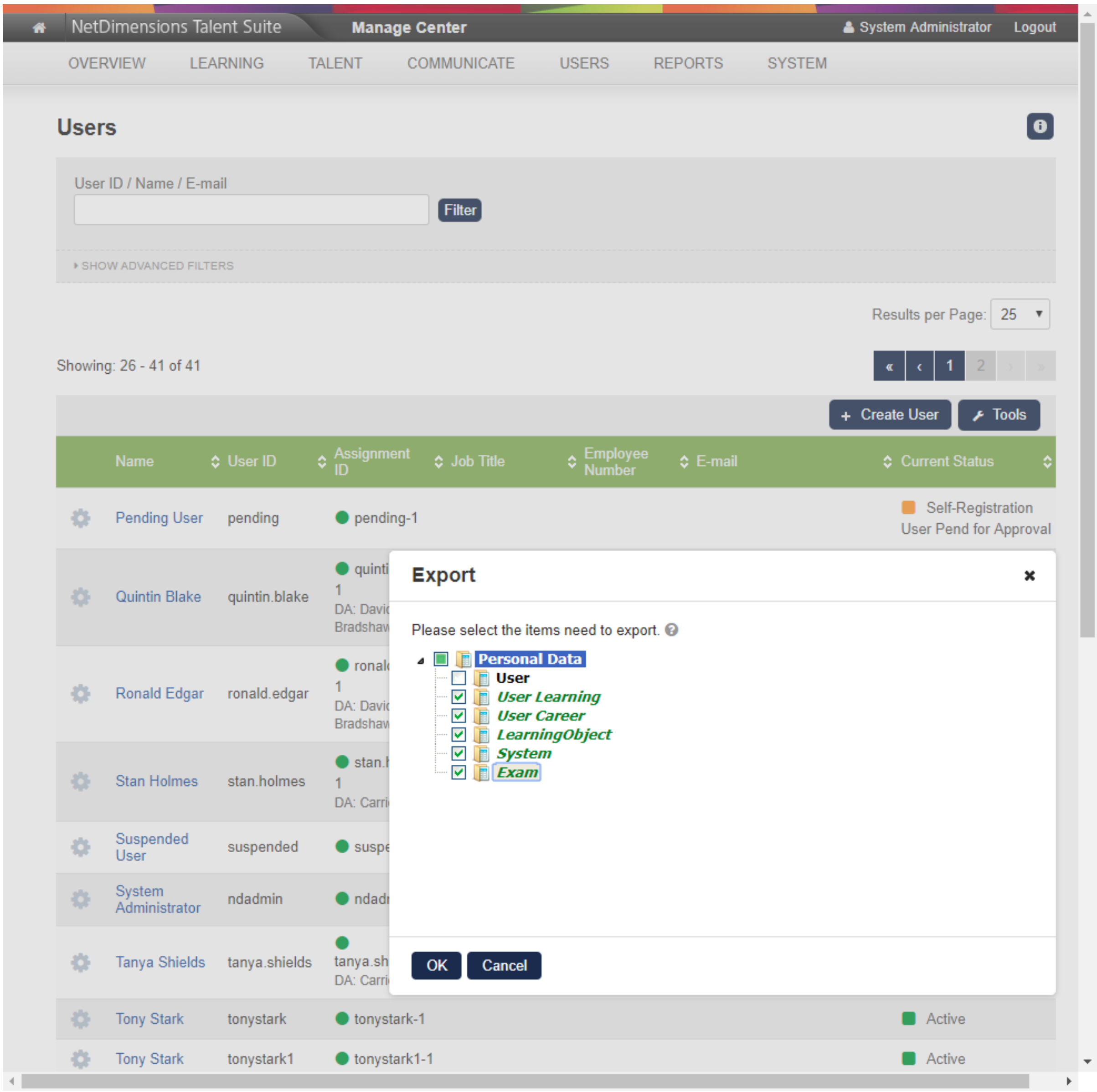
Reinstating Logically Deleted Users

Administrators with appropriate access control will see the **USER MANAGER** > **Logically Deleted Users** page, where they can reinstate Logically Deleted Users by changing their status to "Active".


NetDimensions Talent Suite
Manage Center
ADMINISTRATOR System
Logout
OVERVIEW
LEARNING
TALENT
COMMUNICATE
USERS
REPORTS
SYSTEM
Logically Deleted Users
User ID / Name / E-mail
Filter
SHOW ADVANCED FILTERS
Results per Page: 25
Showing: 1 - 2 of 2
Tools
Name
User ID
Job Title
Employee Number
E-mail
AUBREY Glenna
glennaaub
Sales Representative
16940213
Glenna.Aubrey@kiewit.com
MITCH Ronaldo
ronaldom
UR/UX Designer
16371120
Mitch@amazon.com
Showing: 1 - 2 of 2
Change User Status
MITCH Ronaldo
User ID: ronaldom
Current Status Logically Deleted
Change Status to
Active
Select a status
Active
Suspended
Account Closed
Self-Registration User Pend for Approval
Locked
User Account/Records Migrated
License Violation

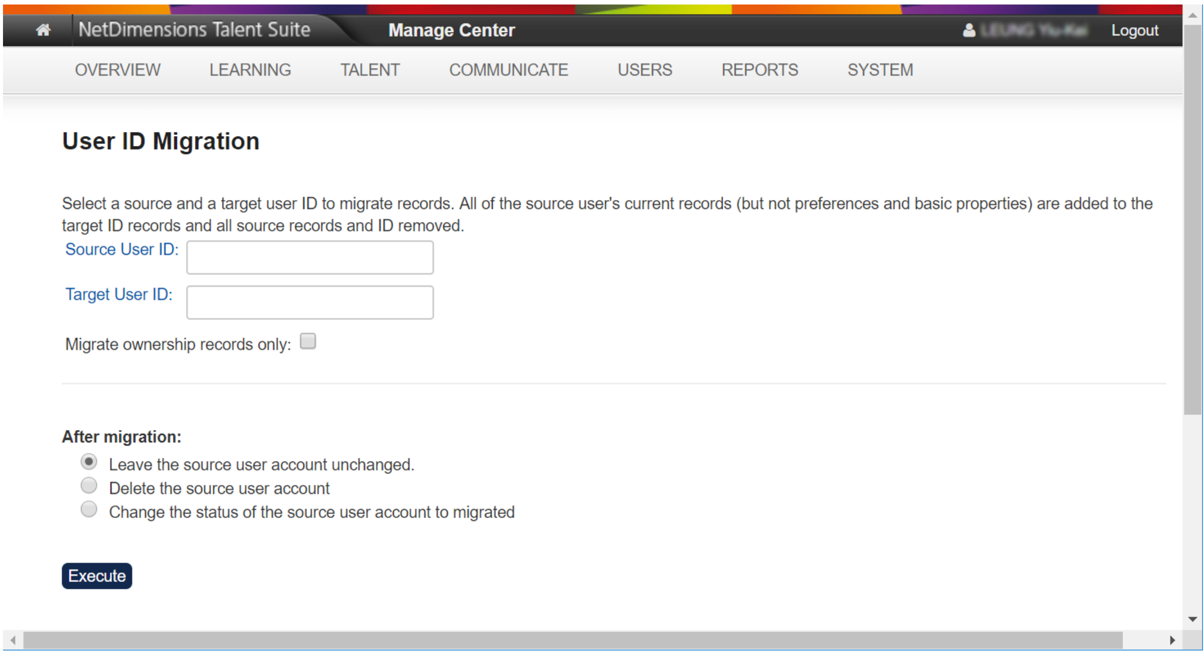
Exporting Personal Data

To export the personal data of a given user, select "Export Personal Data" under him / her to download into a .zip file. Administrators can select the categories of data to export:



User ID Migration

Sometimes there are records spread across two user accounts that need to be merged into a single user account. The **User ID Migration** Function under **Manage Center** > **USERS** > **USER MANAGER** c an serve such a purpose.



The Function has the following settings:

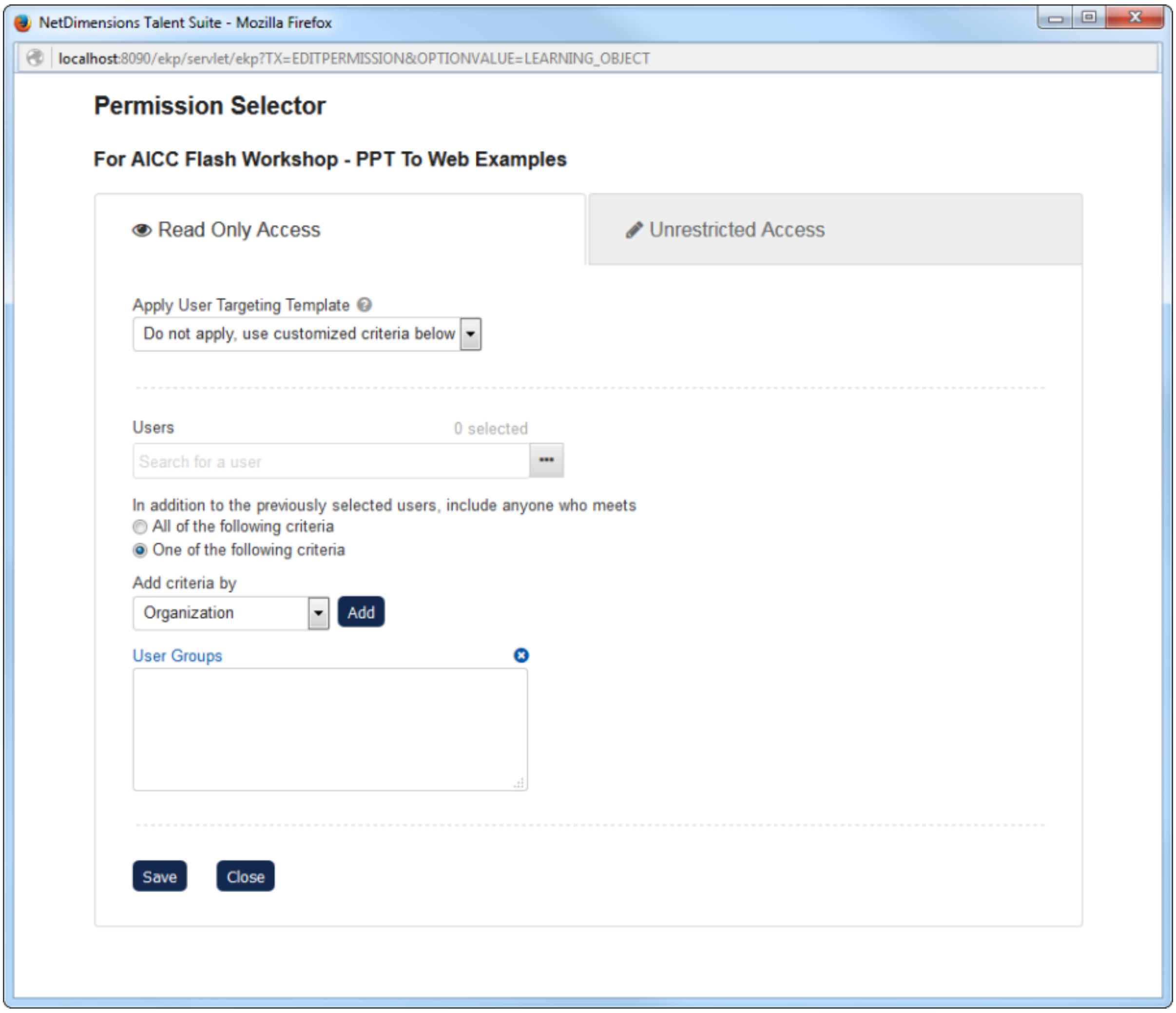
Property	Description
Source User ID	The source user account that records should be migrated FROM
Target User ID	The target user account that records should be migrated TO
Migrate ownership records only	If checked, only the ownership of the following records will be migrated: • Exams • Bookmarked reports (Dashboard), Standard reports, and Report wizard reports • Repository files • User groups • Scheduled tasks and reports If unchecked, the migration will transfer records from the source account to the target account. These records exclude Preferences and Basic Properties and include: • Notebooks • Withdrawal reasons • Forum posts • Exam, Article, and Bulletin ownerships • Bookmarked reports (Dashboard), Standard reports, Report wizardreports,and Received scheduled reports • Homework files (uploaded and received), Batch report files, Repository files, and Uploaded files • Surveys • Instructor comments • Examattempts • Accounting, Payment, and Approval records • Training records (including CMI data and SCORM global objectives) • Messages received/sent • Supervisions • Instructors • Certifications • Training plan • External mail messages • Email templates • External training • Custom attributes • Competency awards and assignments • Scheduled tasks • Optional payment items • Associated organizations • Organization memberships • User appraisals (as appraiser/appraisee) • User groups (ownership and membership) • Instructor assignments • Job profiles • Course contact lists

After migration:	**One** of the options below: • Leave the source user account unchanged. • Delete the source user account • Change the status of the source user account to migrated

Click **Execute** to perform the migration.

Features for the Standard Permission Selector

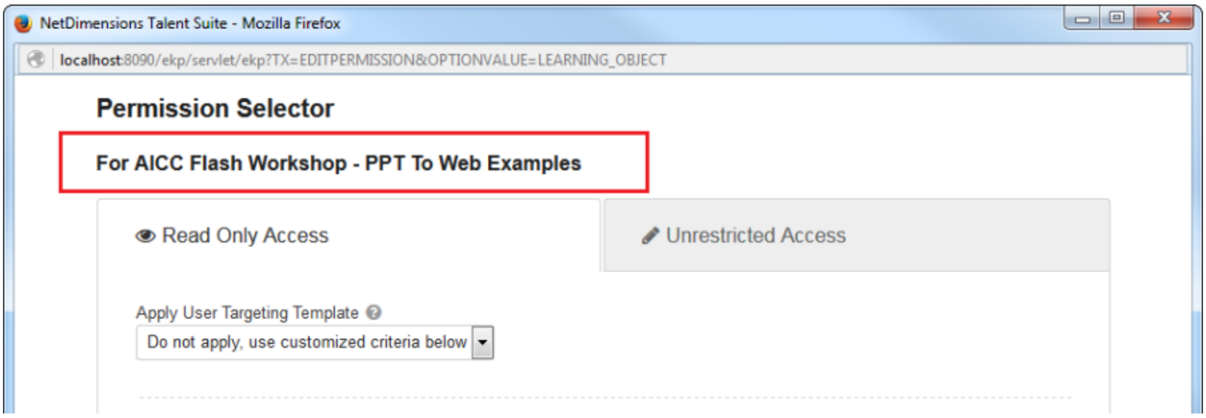
Given how almost every object requires the permission settings to be configured, the Permission Selector feature is the most frequently accessed screen by Administrators.



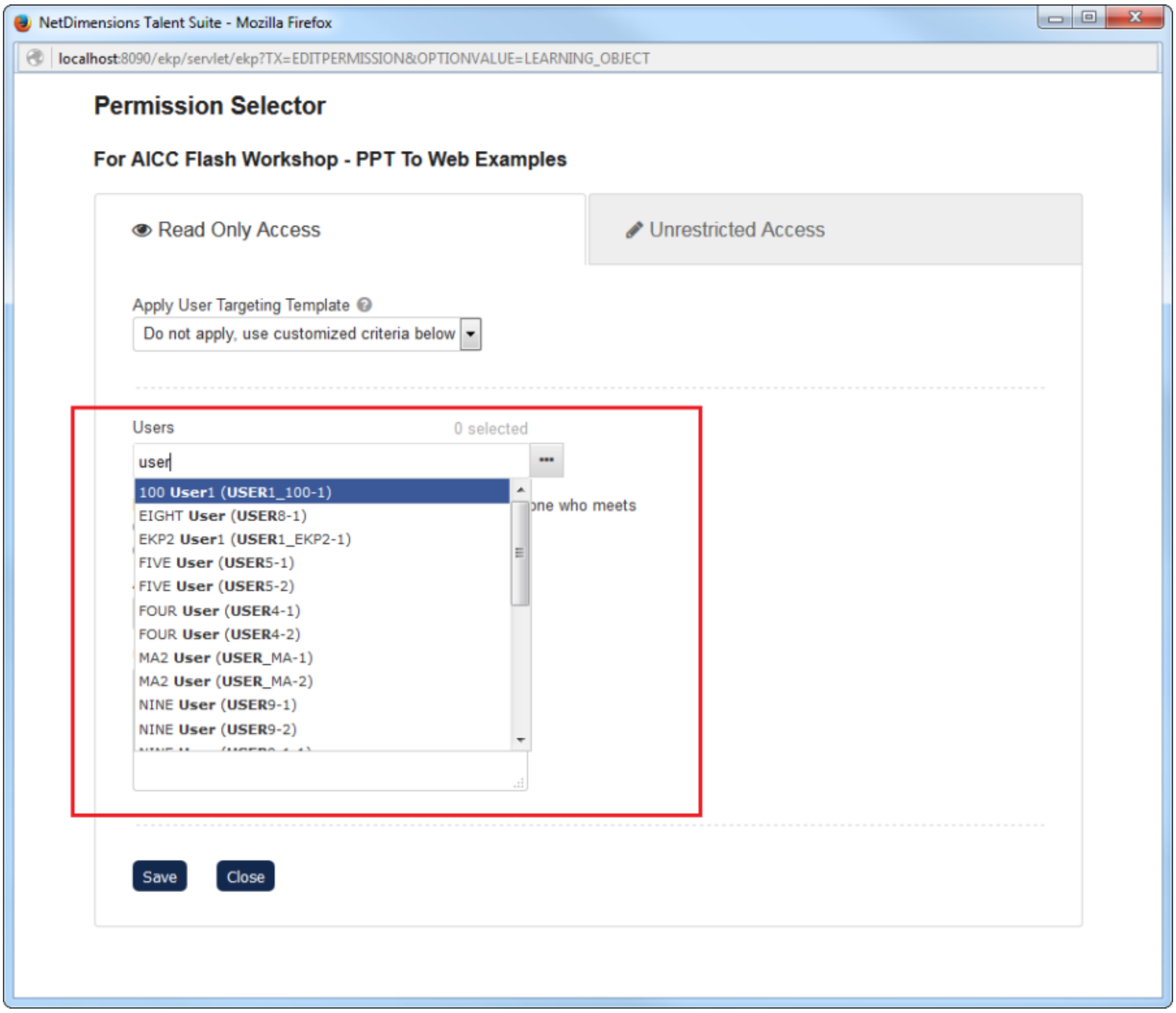
The Permission Selector screen

User Interface

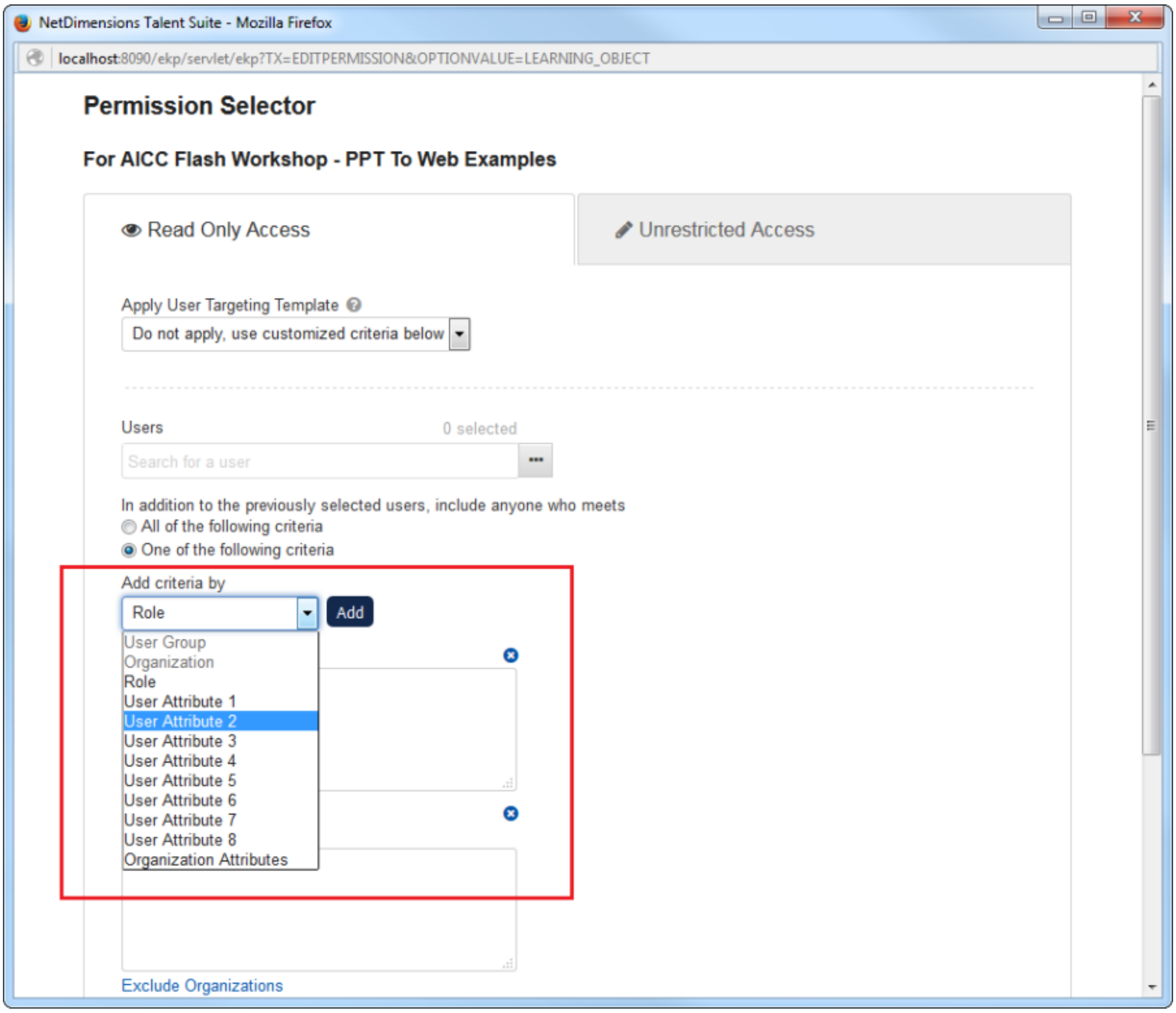
The target object name where the permission is being edited on is displayed on the Selector.



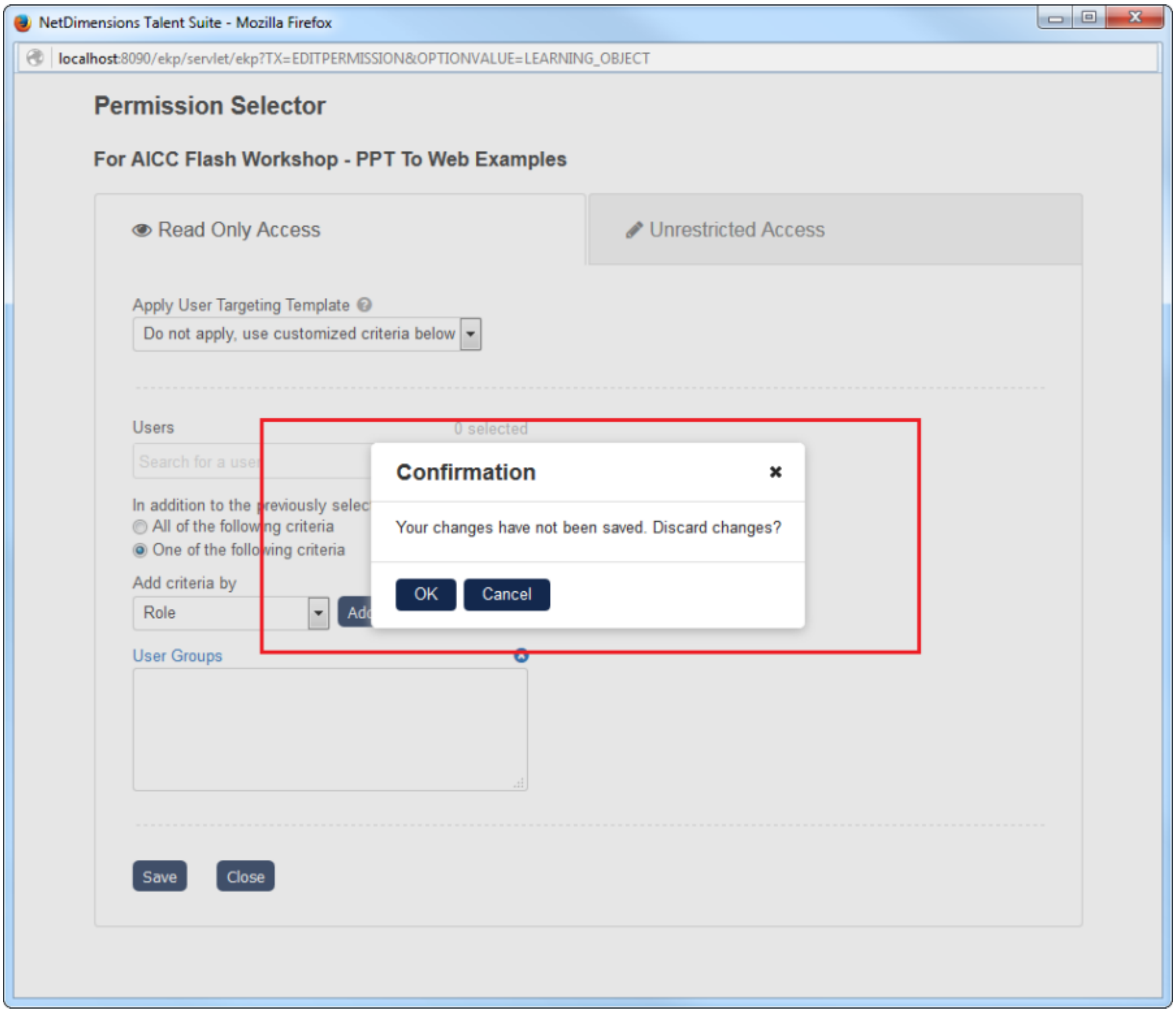
For user targeting, while doing a quick search on users, suggestions will appear within the selector. Clicking the button will further bring up the standard advanced selector with additional filtering if the simple user search can't identify the relevant users.



After the criteria type has already been added and specified, it would be hidden from the criteria drop down menu for the selection until it is removed from the selected area.



If there were any changes that was not yet saved, a confirmation dialog with the warning message will appear for the Administrator trying to leave the screen.


NetDimensions Talent Suite - Mozilla Firefox
localhost:8090/ekp/servlet/ekp?TX=EDITPERMISSION&OPTIONVALUE=LEARNING_OBJECT
Permission Selector
For AICC Flash Workshop - PPT To Web Examples
Read Only Access
Unrestricted Access
Apply User Targeting Template
Do not apply, use customized criteria below
Users
0 selected
Confirmation
Your changes have not been saved. Discard changes?
OK
Cancel
All of the following criteria
One of the following criteria
Add criteria by
Role
User Groups
Save
Close

Terms of Use

Administrators can set up Terms of Use and target specific Users. Users must accept all Terms of Use presented to them at first login before they can use the system. If they decline, they will be logged out of the system immediately.

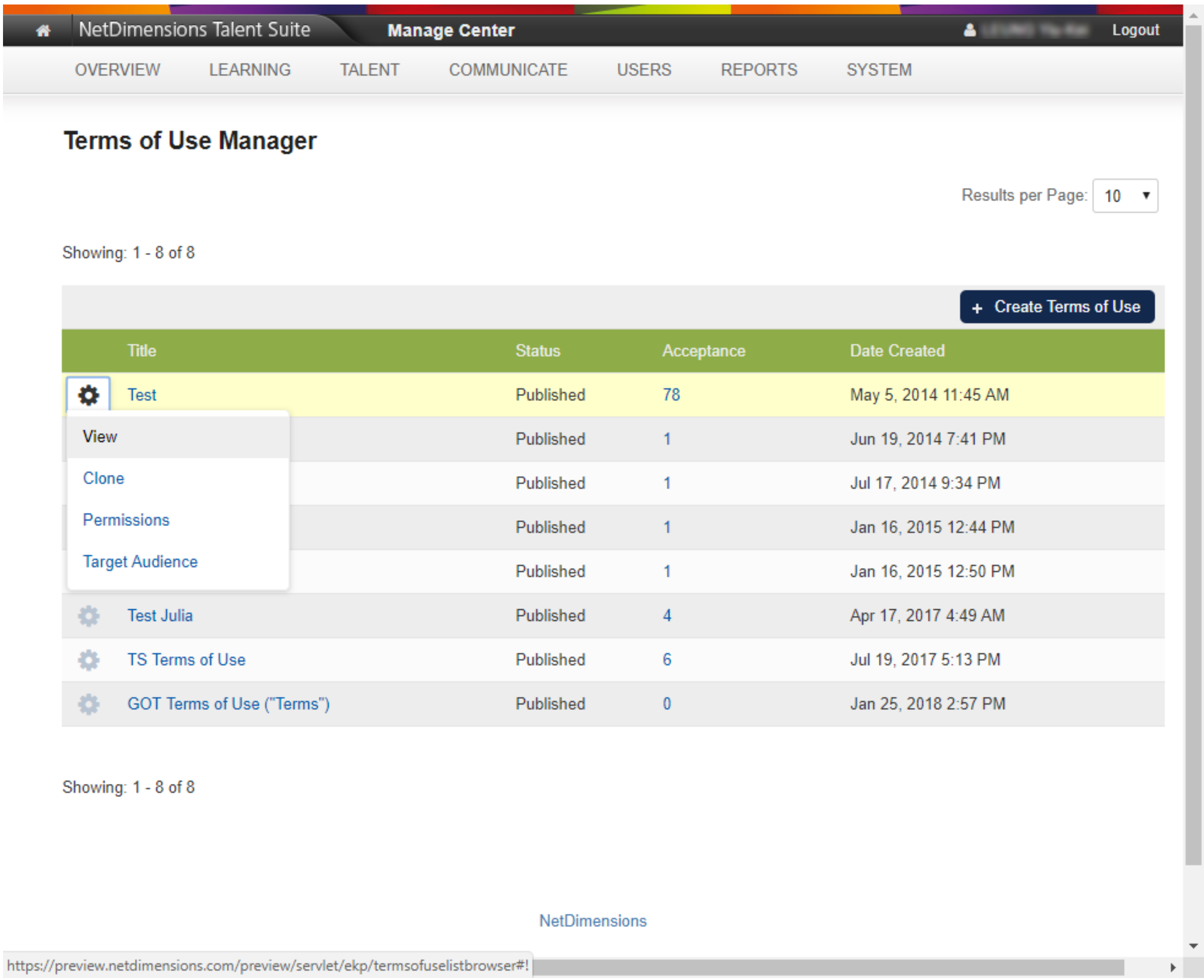
Terms of Use have the following status:

- **Pending** - Terms of Use take on a "Pending" status until they are explicitly published. Only **Pending** Terms can be edited.
- **Published** - Once published, Terms of Use cannot be edited or deleted.

Terms of Use Manager

Administrators can manage the Terms of Use through **SYSTEM** > **SYSTEM SUPPORT FUNCTIONS** > **Terms of Use Manager**. Here, Terms of Use are listed with:

- **Title**
- **Status** (Pending or Published)
- **Acceptance** -The number of users that have accepted each Terms of Use. The Acceptance Details can be viewed by clicking the number directly.
- **Date Created**



For each Terms of Use, you can:

- Clone

- View/Edit
- Publish
- Set Permissions
- Set Target Audience
- Delete

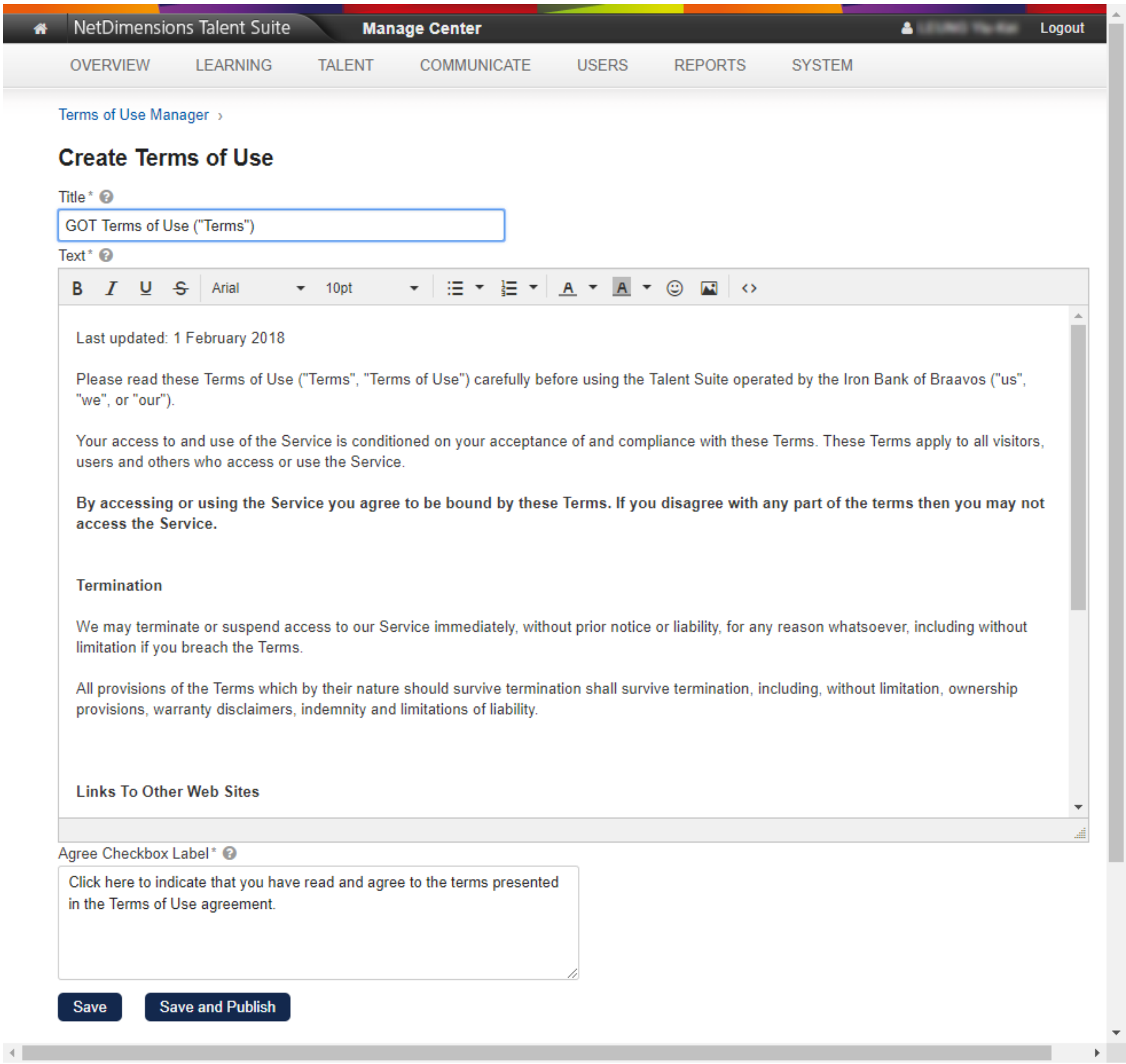
Terms of Use that have been published cannot be further modified thus Edit, Publish, Delete are not available for Terms of Use in the “Published” status.

Creating New Terms of Use

1. Click **+ Create Terms of Use**.

2. Enter a Title, the Terms of Use Text, and the Agree Checkbox Label.

5. Click **Save**.



Targeting Terms of Use

Terms of Use can be targeted at individuals matching specific user criteria for acceptance. This allows, for example, Terms of Use to be written for and targeted at users in a certain location only. It also allows multiple Terms to be targeted at a single user.

1. Click **Target Audience** under the drop down of the desired Terms of Use in **Terms of Use Manager**, or the **Target Audience** Button on the **View** / **Edit Terms of Use** Page.

2. In **Target Audience** Selector, enter the user criteria.

3. Click **Save**.

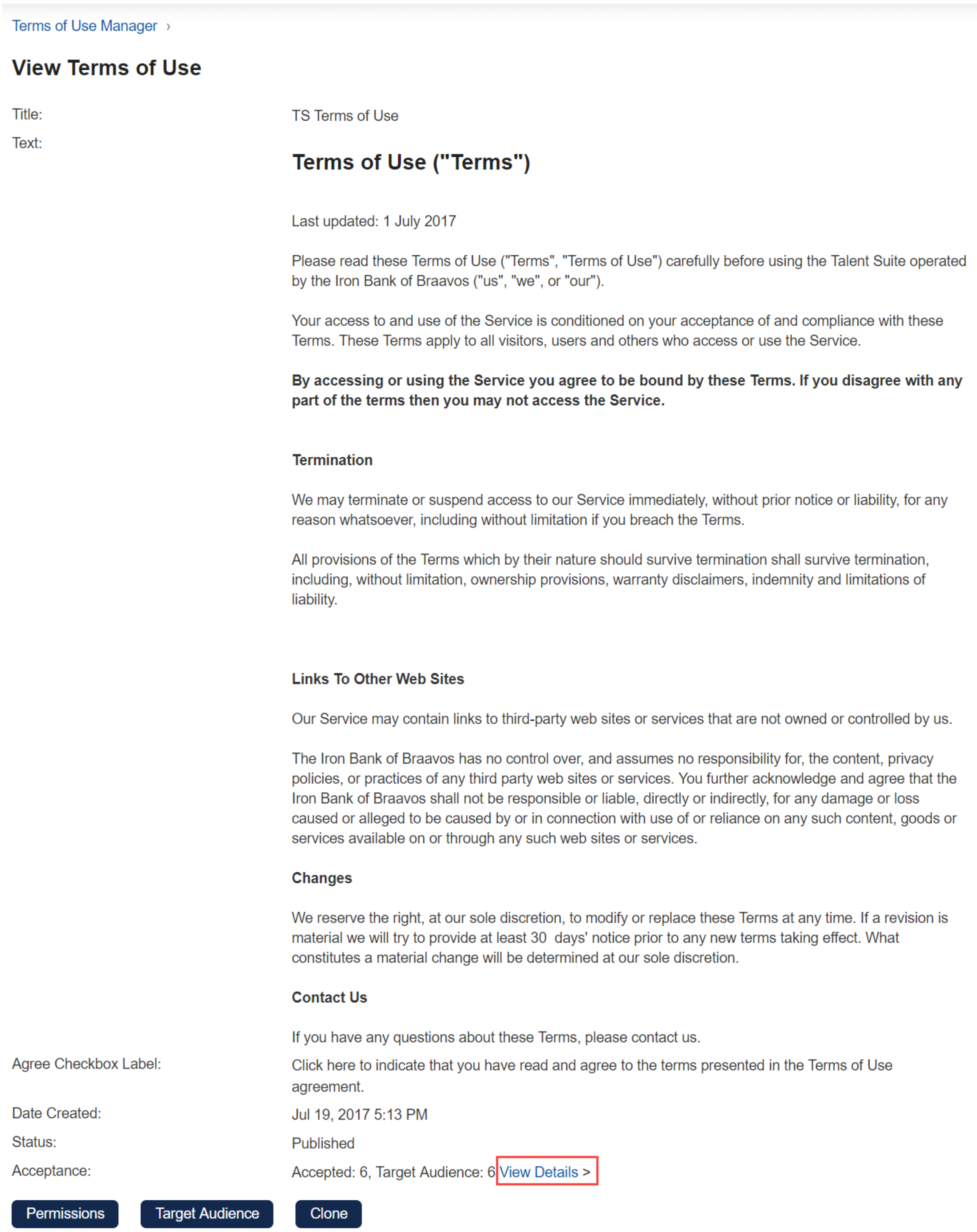
Publishing Terms of Use

Click **Publish** under the drop down of the desired Terms of Use in **Terms of Use Manager**, or the **Save and Publish** Button on the **Edit Terms of Use** Page.

If the Terms are to be changed, a new one can be created and targeted at the relevant users. The **Clone** function, available in the drop down in **Terms of Use Manager** or on the **Edit Terms of Use** Page, may be useful to Administrators if the changes are very slight.

Viewing Terms of Use

The details of the Terms of Use set up in NTS can be viewed by clicking the Terms directly or **View** under the drop down:


Terms of Use Manager ›

View Terms of Use

Title: TS Terms of Use

Text:

Terms of Use ("Terms")

Last updated: 1 July 2017

Please read these Terms of Use ("Terms", "Terms of Use") carefully before using the Talent Suite operated by the Iron Bank of Braavos ("us", "we", or "our").

Your access to and use of the Service is conditioned on your acceptance of and compliance with these Terms. These Terms apply to all visitors, users and others who access or use the Service.

By accessing or using the Service you agree to be bound by these Terms. If you disagree with any part of the terms then you may not access the Service.

Termination

We may terminate or suspend access to our Service immediately, without prior notice or liability, for any reason whatsoever, including without limitation if you breach the Terms.

All provisions of the Terms which by their nature should survive termination shall survive termination, including, without limitation, ownership provisions, warranty disclaimers, indemnity and limitations of liability.

Links To Other Web Sites

Our Service may contain links to third-party web sites or services that are not owned or controlled by us.

The Iron Bank of Braavos has no control over, and assumes no responsibility for, the content, privacy policies, or practices of any third party web sites or services. You further acknowledge and agree that the Iron Bank of Braavos shall not be responsible or liable, directly or indirectly, for any damage or loss caused or alleged to be caused by or in connection with use of or reliance on any such content, goods or services available on or through any such web sites or services.

Changes

We reserve the right, at our sole discretion, to modify or replace these Terms at any time. If a revision is material we will try to provide at least 30 days' notice prior to any new terms taking effect. What constitutes a material change will be determined at our sole discretion.

Contact Us

If you have any questions about these Terms, please contact us.

Agree Checkbox Label: Click here to indicate that you have read and agree to the terms presented in the Terms of Use agreement.

Date Created: Jul 19, 2017 5:13 PM

Status: Published

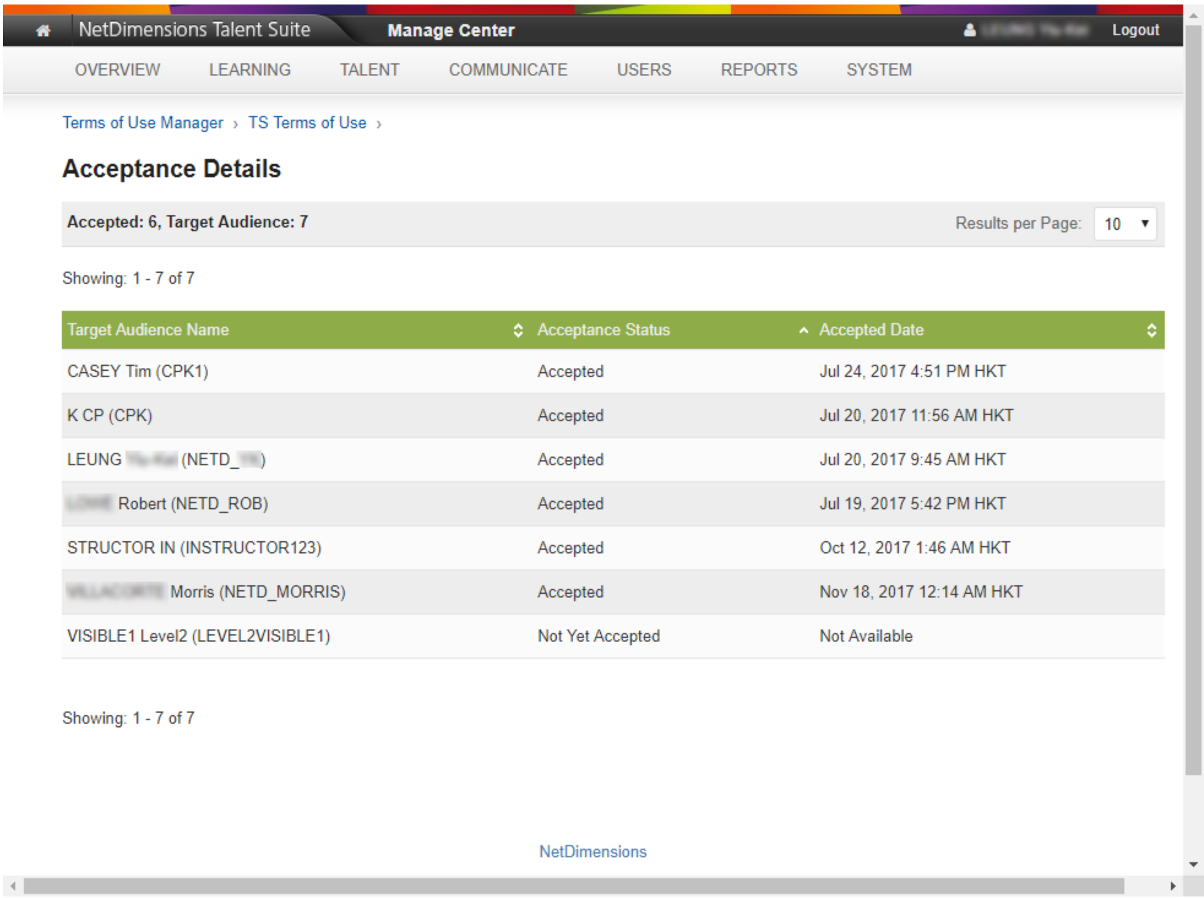
Acceptance: Accepted: 6, Target Audience: 6 View Details >

Permissions Target Audience Clone

Click **View Details** to review the Acceptance Details of this Terms of Use.

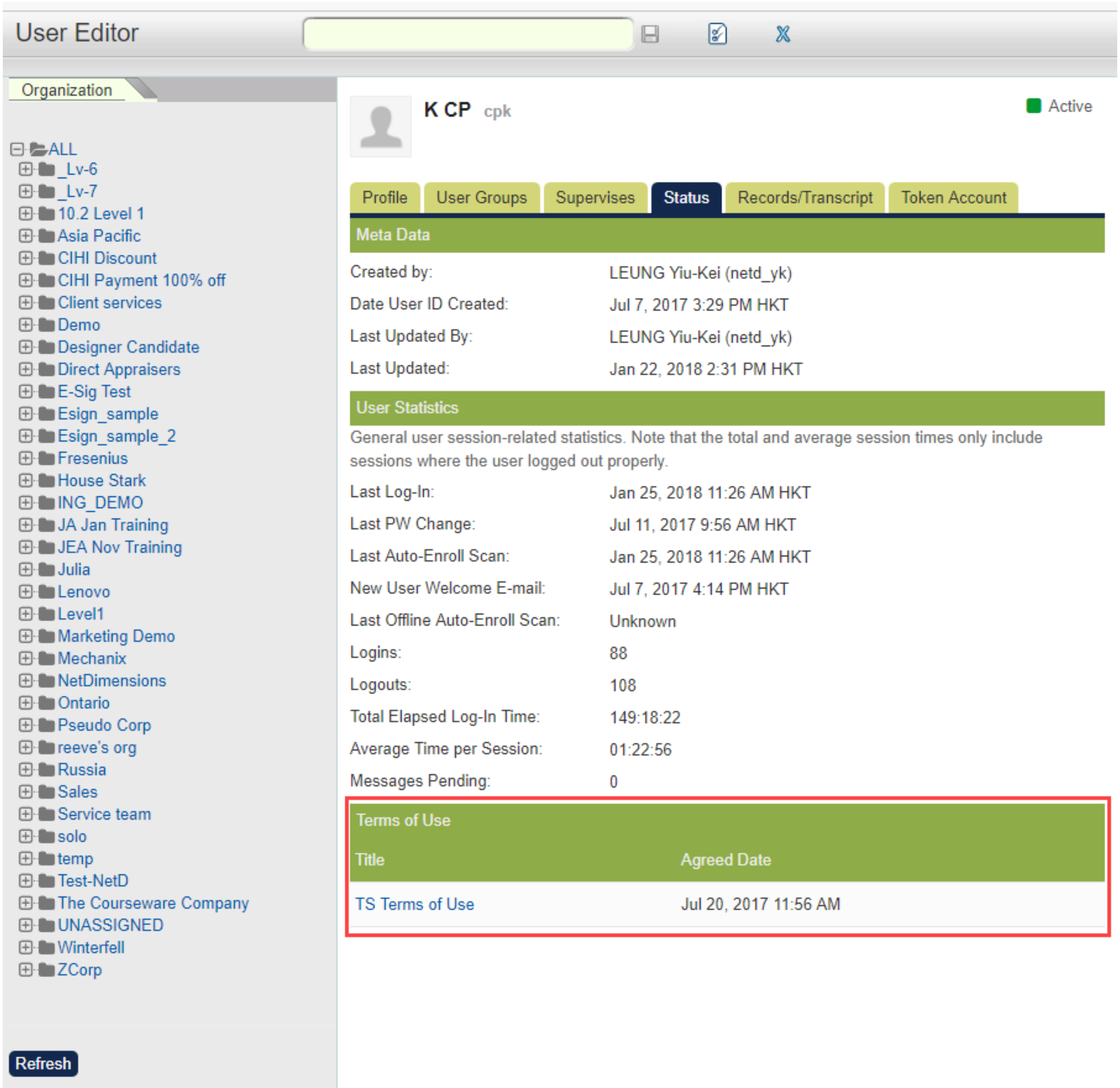
Viewing the Acceptance Details

The **Acceptance Details** lists the Users who have / have not yet accepted the Terms of Use and the **A ccepted Dates**.



Checking Acceptance Per User

To view the Terms of Use that have been accepted by a user, go to **User Manager** and open the **User Editor** for the User in question. The accepted Terms of Use will be listed under "Terms of Use" on the Status tab:



To view the Terms' contents in a pop-up window, click the Terms directly.

Access Control

The access controls for Terms of Use are configured under **USERS** > **ROLES** > **System Roles** > **Access control for role**:

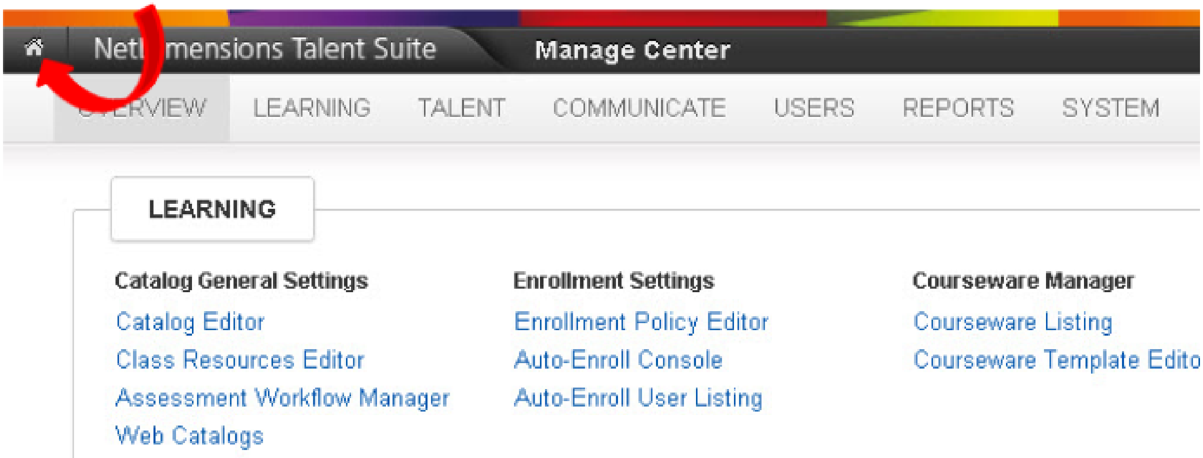
- **Learner-Oriented Features > Personalization Features > Terms of Use** - Managing the **Terms of Use** Tab under **Settings** of Users.
- **Review Features > Review Terms of Use** - Managing the **Terms of Use** Region on the **Status** Tab in **User Editor**.
- **Manage Features > Terms of Use Manager** - Managing the **Terms of Use Manager** under **SYSTEM** > **SYSTEM SUPPORT FUNCTIONS**

Performance Goal

Performance Goals Created and Managed by the Appraisee

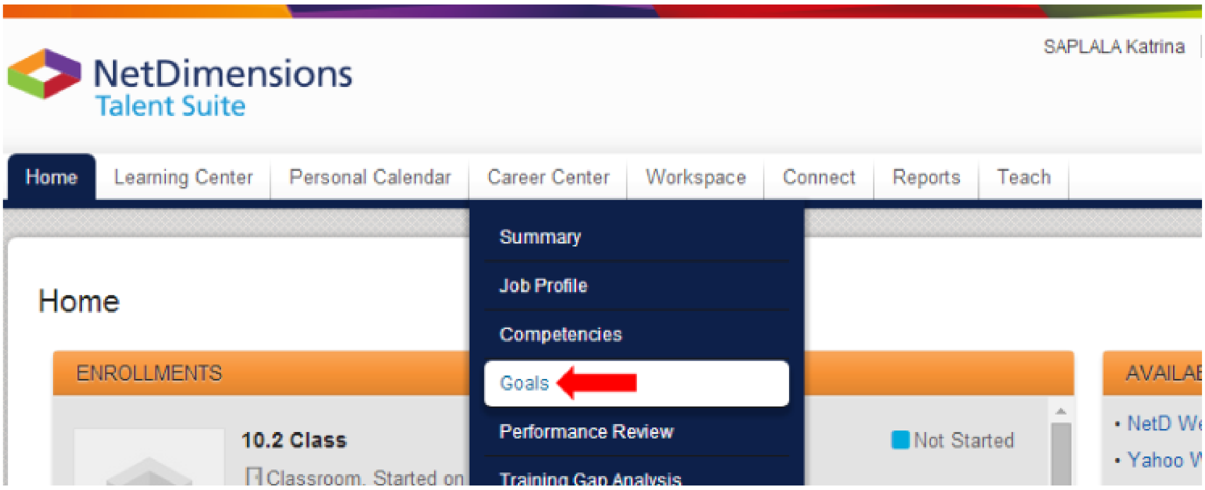
Creating and Linking Performance Goals

This section teaches you the procedures on how a user create his/her own performance goal:

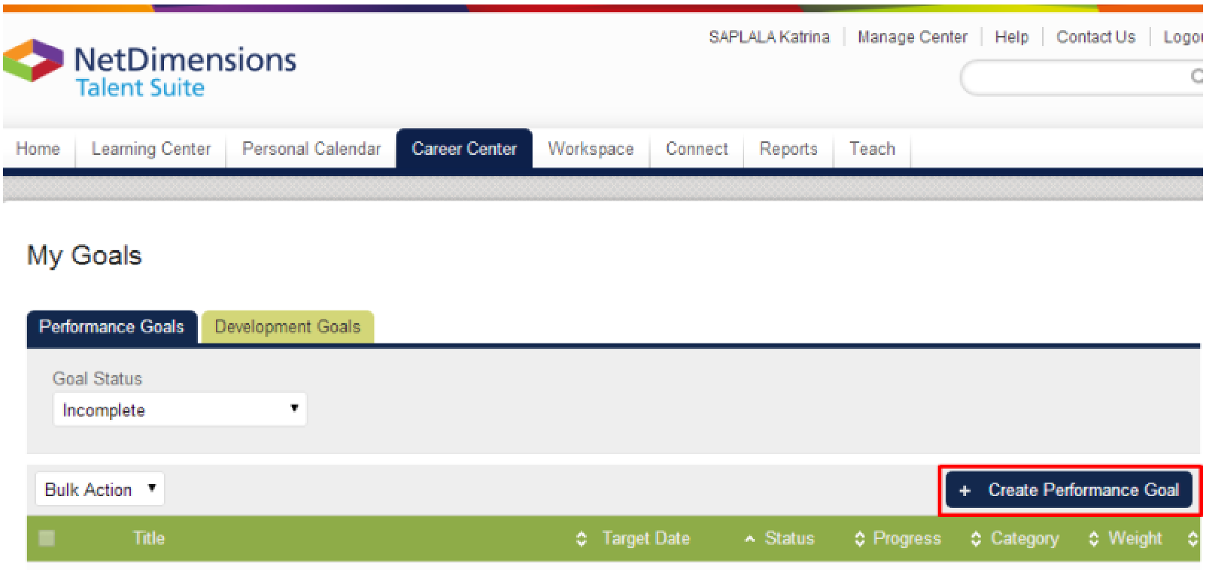


Note: To perform this procedure, one must be in the Talent Suite main menu. If user is in the **Manager Center** menu, click the **Home** icon to return to the main menu.

1.On the main menu, select **Career Center**, and then click the **Goals** option.

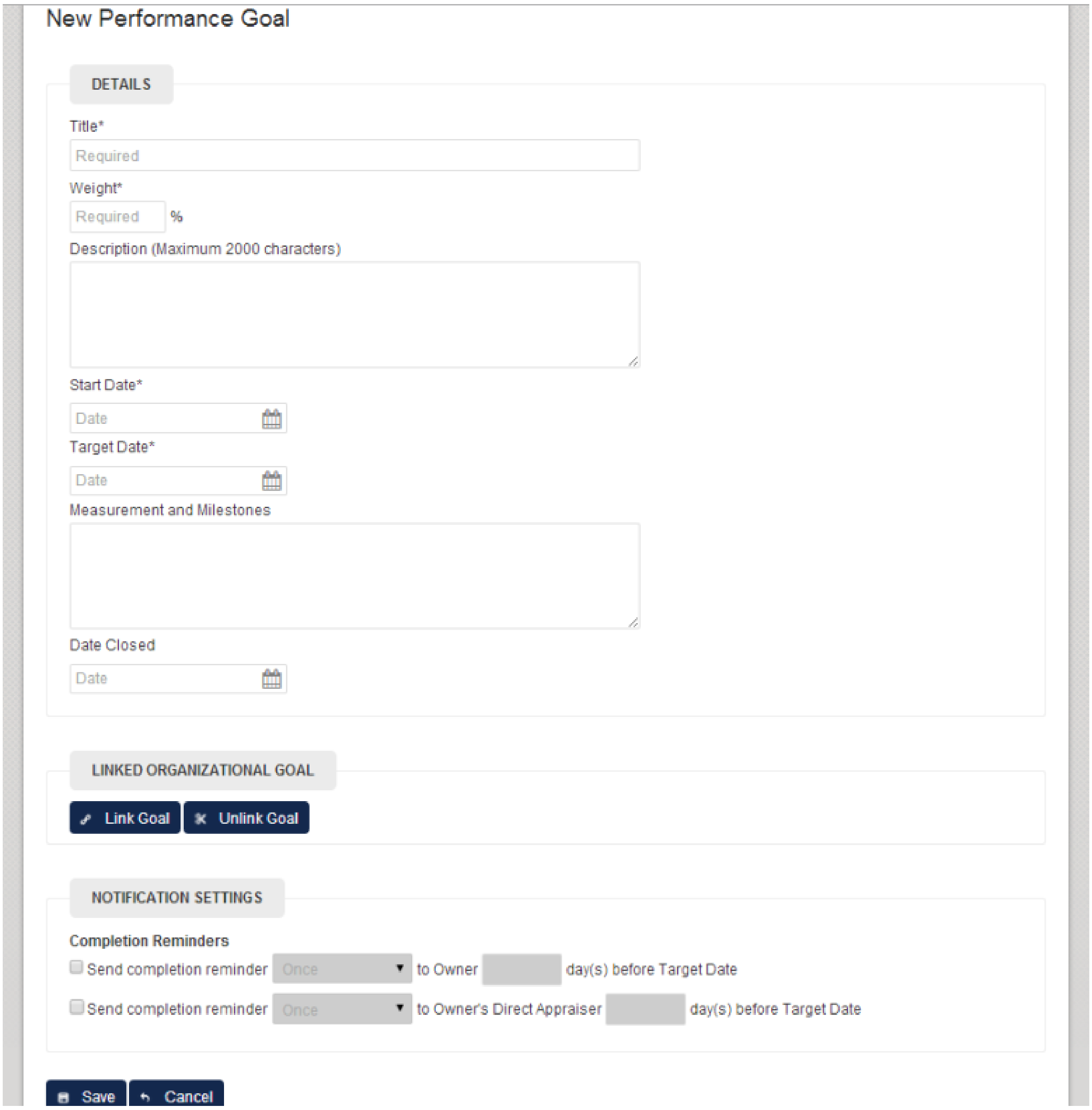


2. This opens the *My Goals* screen. The screen shows the list of available performance goals. Click the Create Performance Goal button.

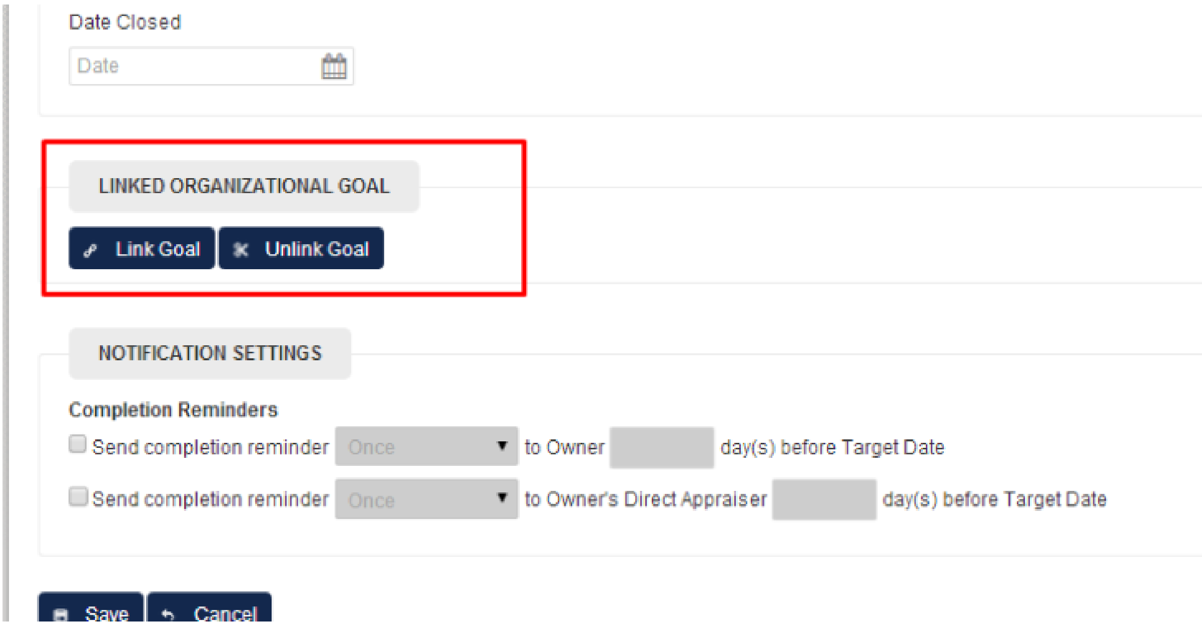


3.This opens the *Performance Goals* details. From here enter the performance goals details.

- Title
- Weight
- Description
- Start Date / Target Date
- Measurement & Milestone
- Date Close



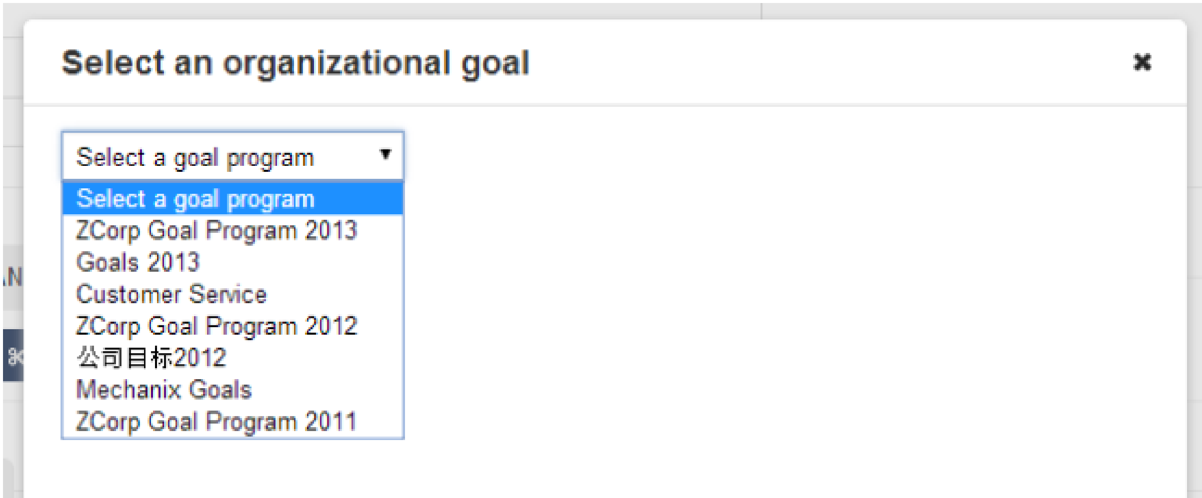
Note: During the creation of the new performance goal, you have an option to link the goal to an organizational goal.



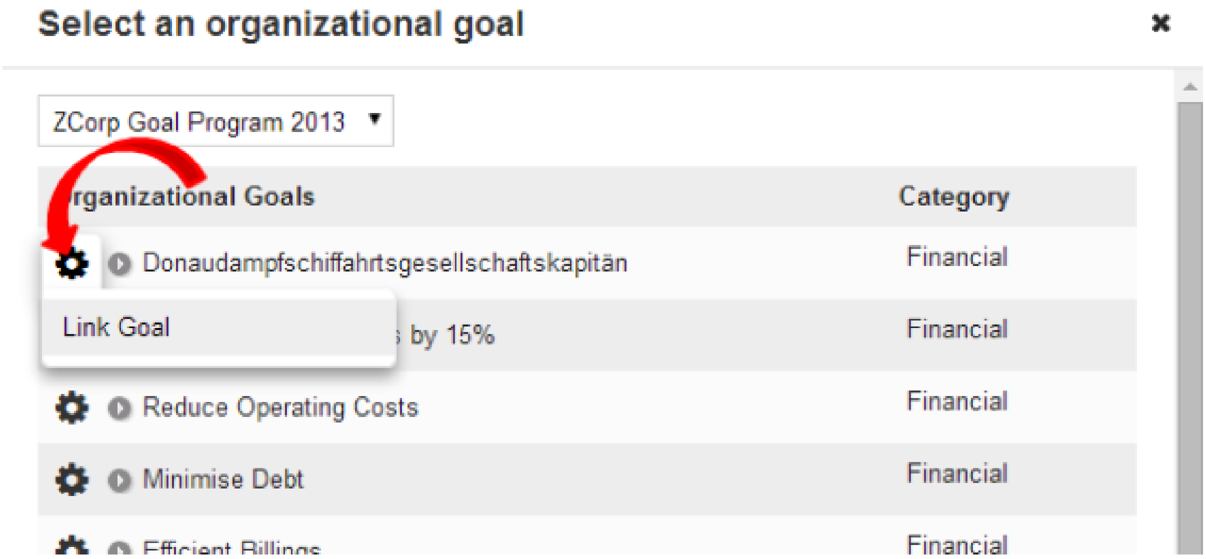
4.Click the **Link Goal** button. The **Select Organizational Goal** screen appears.

To do this, proceed to the next step, otherwise if you decided not to link the your performance goal, proceed to step 7 to save the new performance goal.

5.Select the goal program where the organizational goal you want to link to your performance goal is associated. The list of organizational goal is displayed.



6.Click the **Gear** icon and then select **Link Goal** of the organizational goal you want to link. This returns you to *My Goals* screen. The organizational goal you linked is displayed under the Linked Organizational Goal section.



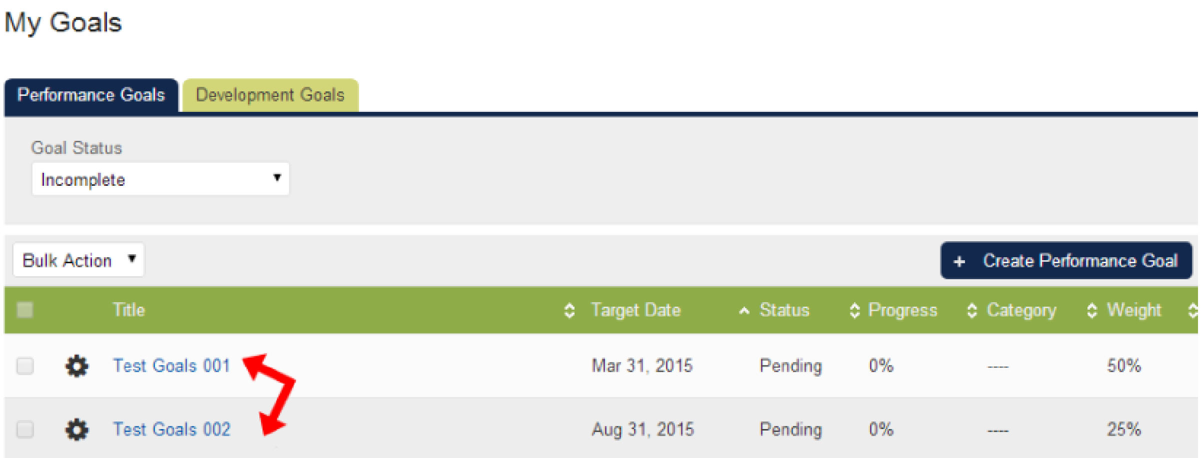
Note: The ***Select a Goal Program*** drop down button displays only the list of goal programs where the user has the permission to access.

7.Click the **Save** button.

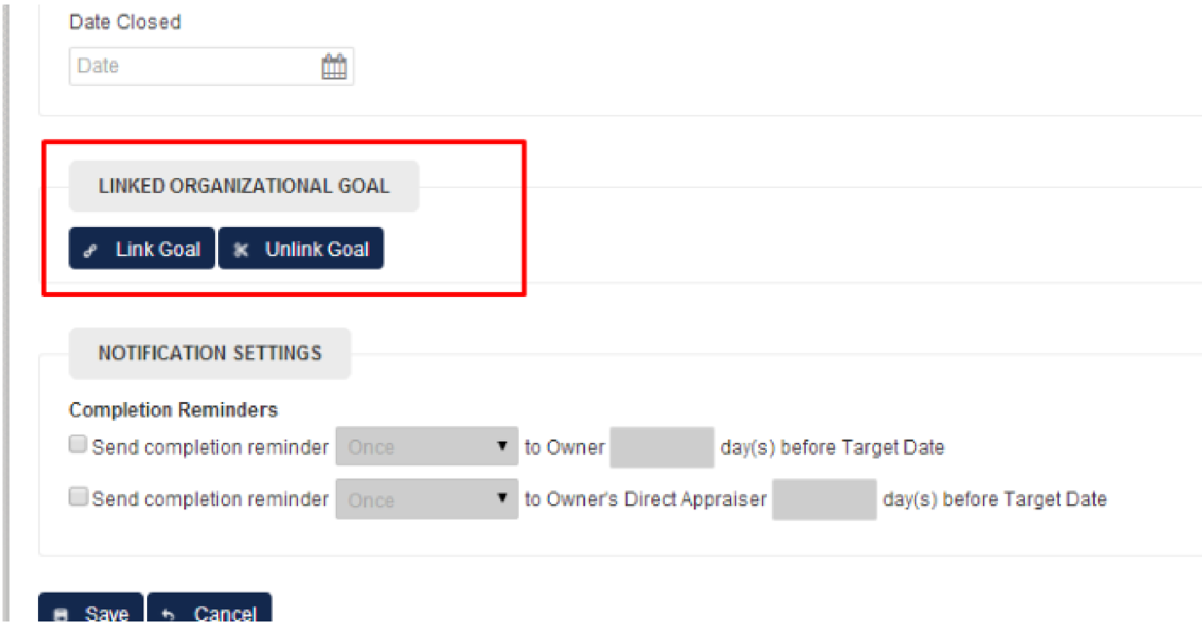
Removing the Link of the Performance Goal to Organizational Goal

This section shows how to remove the link of the performance goal to an organizational goal.

1.From the list of performance goals, click the performance goal you want to unlink.



2.This opens the performance details. Click the **Unlink Goal** button. The performance goal will be unlinked to the organizational goal and then refreshes the *My Goals* screen.

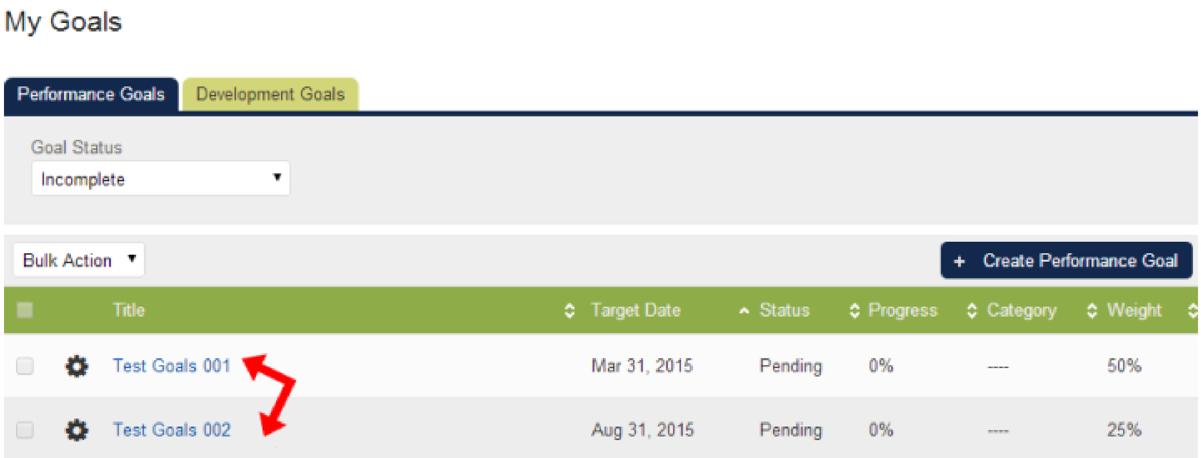


3.Click the **Save** button to keep the updates.

Modifying Performance Goals

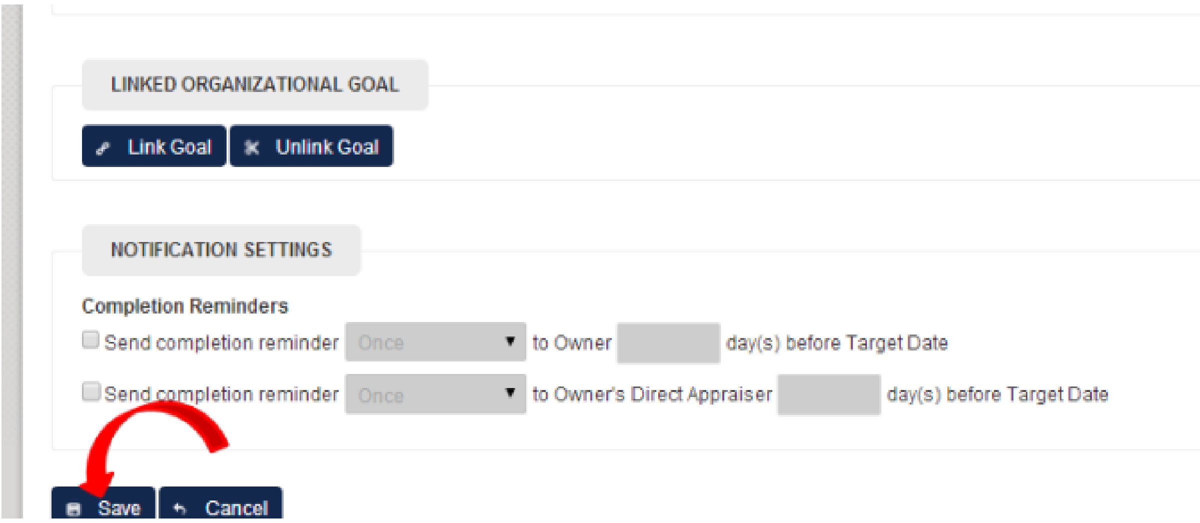
This section shows how to modify details of your performance goal.
Note: A performance goal cannot be edited while an appraisal with goal is in progress.

1.From the *My Goals* screen, click the performance goal you want to modify.



2.This opens Performance Goals details screen. Start modifying the performance goal details.

3.Once modification is completed, click the **Save** button to keep the updates.



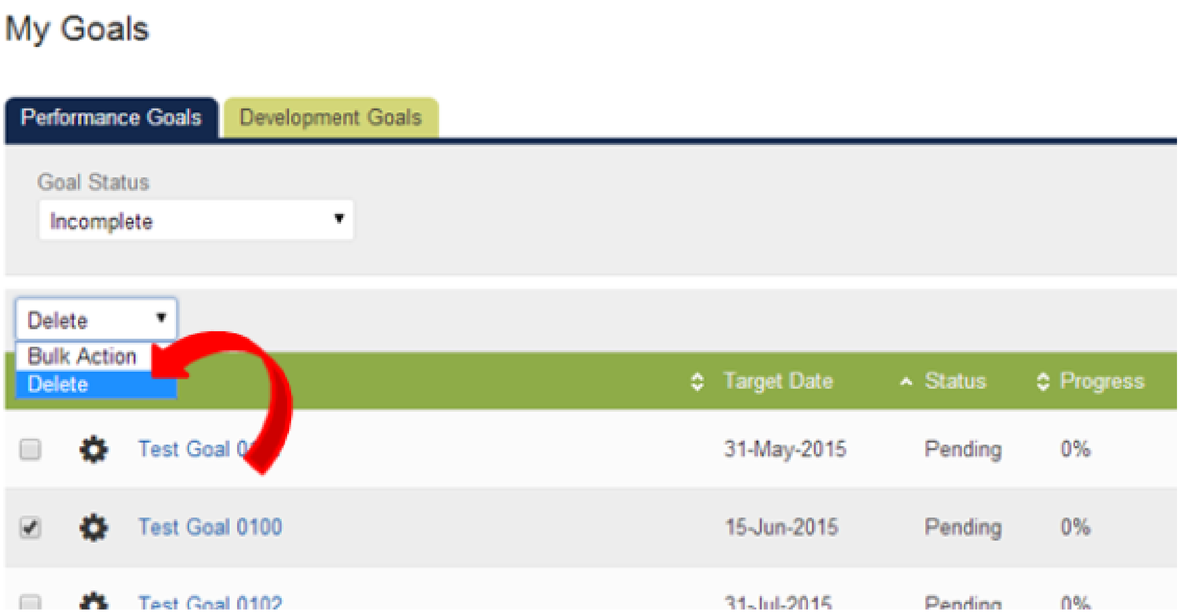
Removing the Performance Goal

This section shows how to remove the performance goal. There are two ways to remove the performance goal first is using the delete button on the **Performance Goals** tab, and Second is using the delete button on the **Performance Goals Details**.

Note: A performance goal cannot be edited while an appraisal with goal is in progress.

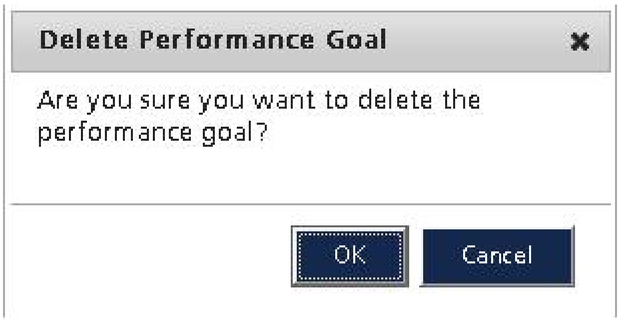
- **Deleting Performance Goal using the Performance Goals tab:**

1.From the *My Goals* screen, tick the box of the performance goal(s) you want to remove.



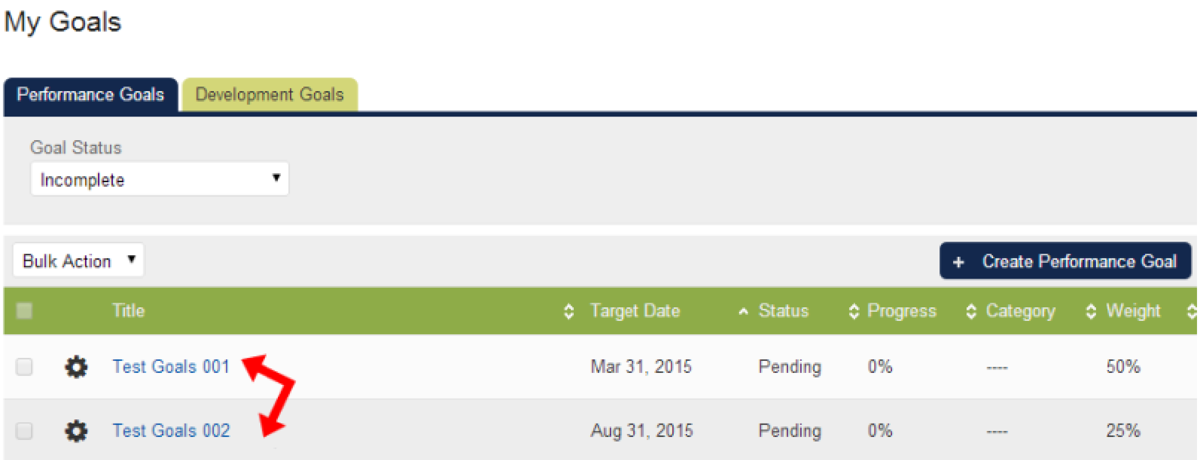
2.Click the **Bulk Action** and then select **Delete.**

3.A confirmation box appears. Click **Ok** to delete. Otherwise click the **Cancel** button to cancel the deletion of the performance goal.



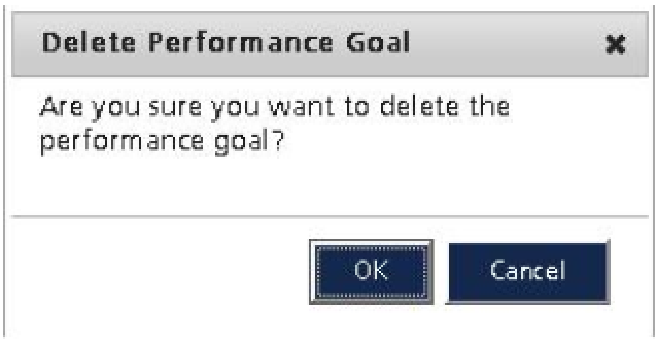
- **Deleting Performance Goal using the Performance Goal Details:**

1.From the *My Goals* screen, click the performance goal you want to remove.



2.This opens Performance Goals details screen. Click the **Delete** button.

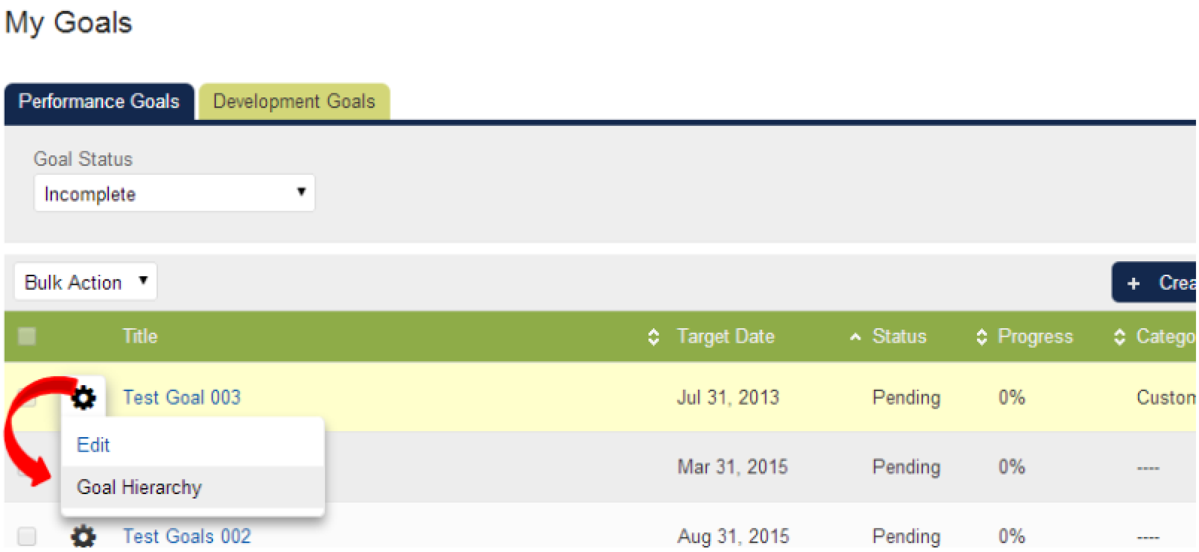
3.A confirmation box appears. Click **Ok** to delete.



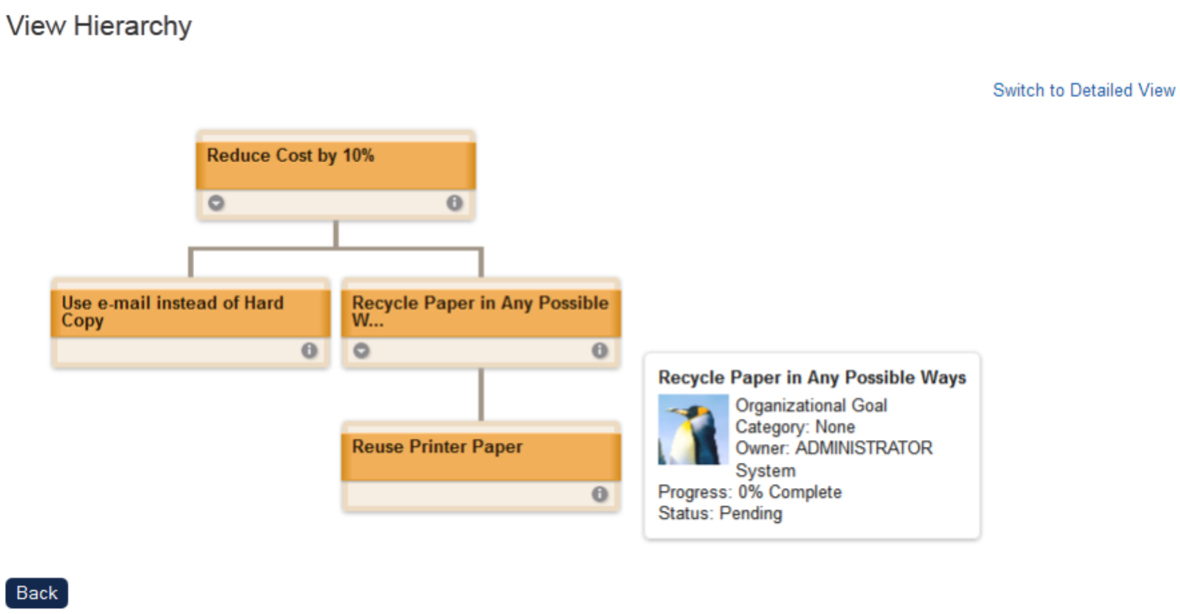
Viewing the Organization Goal Hierarchy Graph

This functionality allows the user to get a better view on how the goals align to the organization's goals. The chart depicts the goal hierarchy of the organizational goal from the root-level. To view the Organizational Goal Hierarchy Graph:

1.From the *My Goals* screen, click the **Tools b**utton of the performance goal you want to view and then select **Goal Hierarchy**.



2.This opens the Organizational Goal Hierarchy.



3.Goal hierarchy graph now contains 2 modes (Detailed View / Summarized View) and can be switched from one to another.

- ***Detailed View*** shows the title, category, owner, progress and status of goals.
- ***Summarized View*** shows only the title, which allows users to view highly cascaded goal hierarchy structure easily. User can preview the Detailed View of a goal by mouse over the "info icon".

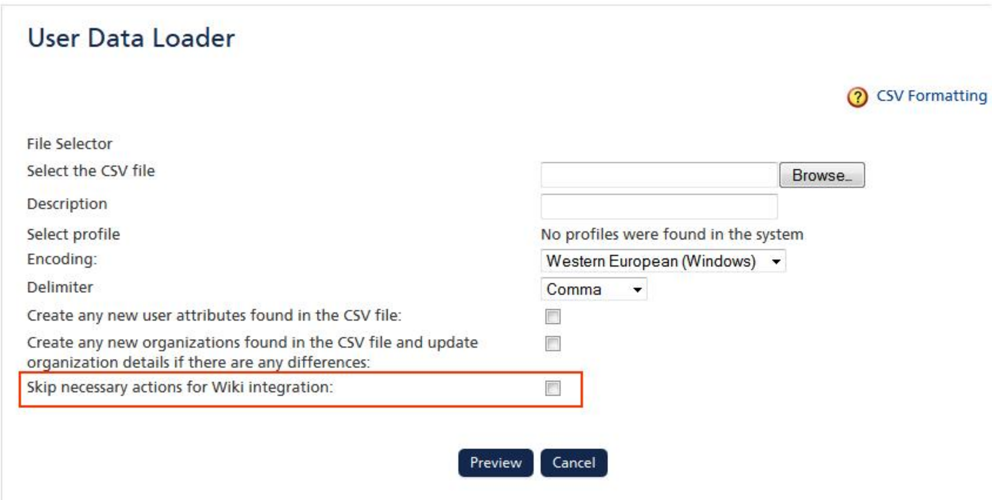
The Goal's title would be truncated if its too long. Mouse over the goal to show the full name.

Wiki Integration - Managing Users

The Managing Users feature is integrated into the Wiki. Talent Suite replicates the user status changes to Confluence and applies to both User Editor & User Data Loader. The table below shows how the wiki acts as the user made changes on the status of the Talent Suite users.

Changing To Status	**Actions To Confluence**
Active	activating user account if any
Suspended	deactivated user account if any
Account Closed	
Logically Deleted	
Locked	
User Account/Records Migrated	
License Violation	

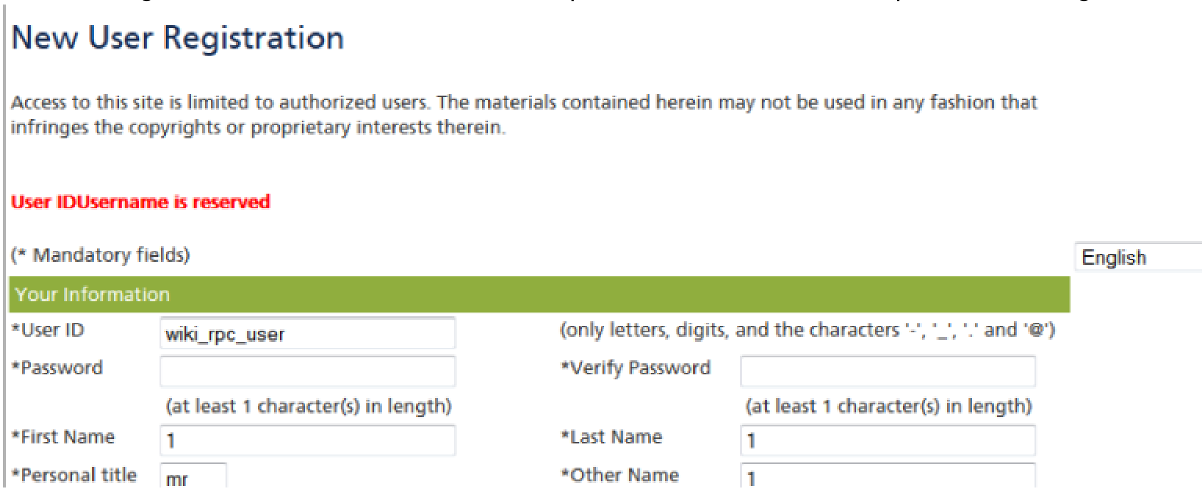
- If user is removed from Talent Suite, the user's corresponding Confluence account will be removed/deactivated.
- Moreover, logging (storing in database table "wiki_interaction_log") will be done for actual remote calls sent to Confluence. This can be used for further diagnosis or integration purposes.
- In User Data Loader, user data will be processed one by one, and individual remote calls may slow down the import process dramatically; to deal with that possible problem, "Skip necessary actions for Wiki integration" option is introduced.
- When this option is selected, the import process would skip remote calls and administrator will then need to take care of updating the Confluence user status manually.

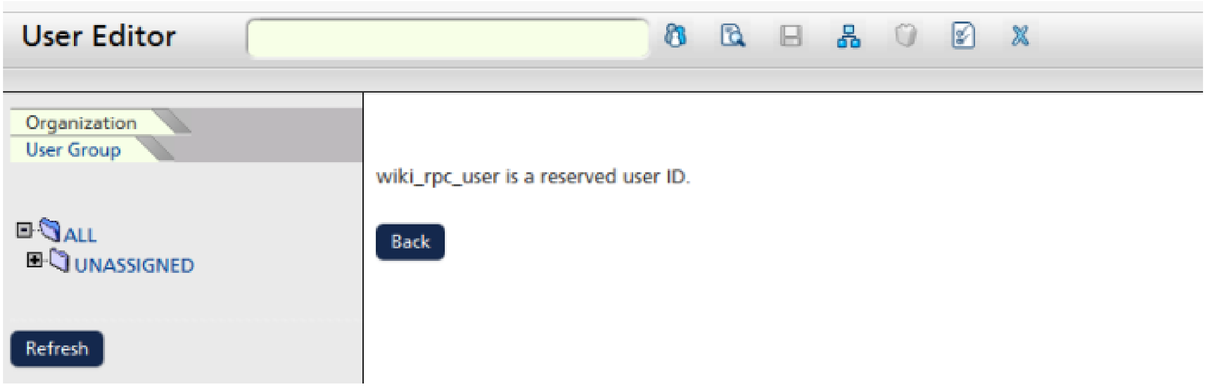


Protecting wiki.rpc.username

Since Confluence integration in the Talent Suite requires a Confluence user to be configured to handle all remote calls (ie. wiki.rpc.username in ekp.properties), and given the feature that Confluence can deactivate /remove a user, it is necessary to safeguard accidental or mistaken deactivation / removal. Also, Talent Suite will not allow the creation of a user with the Id wiki.rpc.username from User Editor, User Data Loader, Self Registration and mEKP User Activation.

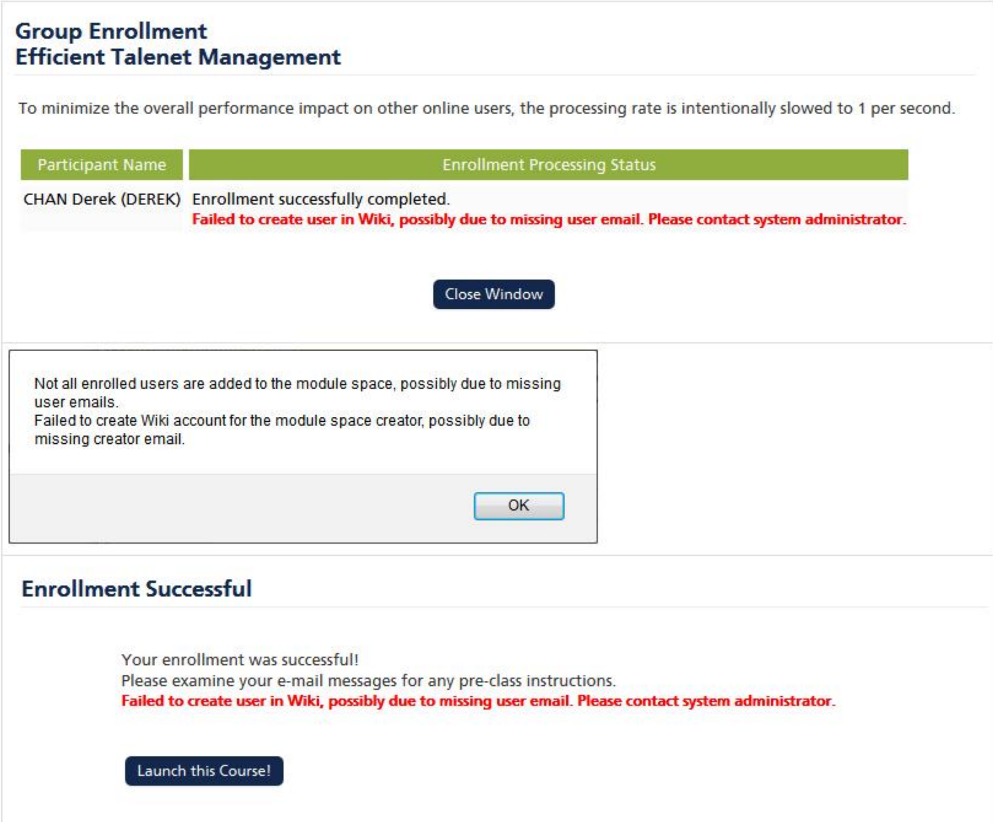
The following illustrates how the Talent Suite responds when the user "wiki.rpc.user" is being created:





Handling for User Creation on Confluence

In Confluence 3.5.0 and later, creating a new user with Confluence Soap API requires a user email address. In cases where the Talent Suite is attempting to create a user without an email address in Confluence, it will provide warnings so that users can carry out necessary follow-up actions.


Group Enrollment
Efficient Talenet Management
To minimize the overall performance impact on other online users, the processing rate is intentionally slowed to 1 per second.
Participant Name
Enrollment Processing Status
CHAN Derek (DEREK)
Enrollment successfully completed.
Failed to create user in Wiki, possibly due to missing user email. Please contact system administrator.
Close Window
Not all enrolled users are added to the module space, possibly due to missing user emails.
Failed to create Wiki account for the module space creator, possibly due to missing creator email.
OK
Enrollment Successful
Your enrollment was successful!
Please examine your e-mail messages for any pre-class instructions.
Failed to create user in Wiki, possibly due to missing user email. Please contact system administrator.
Launch this Course!

Role Access Control

Introduction

The proper configuration of role access rights should be done in the context of an overall organizational security policy. As part of this policy, organizations determine which roles need to be defined, the areas to which each role is allowed access and the type of access allowed.

The Talent Suite allows three types of access to functional areas:

- No Access
- Read-only
- Unrestricted (i.e. Read/Write/Delete access)

Note: For some function selections, those that only provide information, Read-only and Unrestricted access produce, for all practical purposes, identical results. All three attributes are available for each and every feature to simplify the treatment of the list as a whole, and to ensure consistency of security policy implementation.

Role Permissions and Access Rights

In the Role Access screen you define which menus and functions user roles may access and under what conditions (Read-only or Unrestricted). Before setting access rights, you need to configure roles. Refer to the online Administrator Help for procedures.

When setting access rights, keep in mind that if a user has access to the function but not the menu, he cannot access the function through the menu (though he can access the function by directly accessing the URL). For example, if a user role had access to News Manager but not the Manage menu, the user role could not access News Manager from the Manage menu but could access news manager directly from the News Manager URL or another path (if known). Therefore if you do not wish to allow a role to access a function, it is better to deny access at the function level, as well as access to the menu screen in which the function appears.

Note: Also, when setting access rights you should keep in mind that the Talent Suite treats functions as groups of transactions. Therefore in allowing or denying access to a particular function, your action affects the related group of transactions and the associated icons.

Licensing Restrictions

There are presently four licensing options for the Talent Suite:

1. NetDimensions Performance
2. NetDimensions Exams
3. NetDimensions Learning
4. NetDimensions eLearning

NetDimensions Performance offers unrestricted functionality while ***NetDimensions Learning*** is the most functionally restrictive option. When accessing Role Access Control functions, your license option will be displayed. Functions that are not accessible due to license restrictions will be 'grayed out' in the

Role Access screen.

The following functions are available:

- **Learner Oriented Features**
- Learn
- Explore
- Communicate
- Personalization
- Other Menus

- **Review Features**
- Review Features
- Review Sub-menu Features

- **Manage Features**
- Manage Features
- Manage
- Catalog Manager
- Exam Manager
- User Manager
- Community Manager
- Report Categories
- Competency Manager
- System Administration
- Payment Manager

- **Data Access Control**
- Data Access Control
- Role General Permissions

Review Features

Talent Suite offers a great deal of flexibility when it comes to Review and Approval options. Companies can configure Talent Suite such that managers are given a great deal of approval authority, are unfettered with such responsibilities, or something in between.

The decision as to who or which levels of an organization are charged with which particular review, approval and reporting capabilities needs to be made at the organization level.
Potential rights, scenarios and contingency responses should be considered or devised; for example:

- If approval is required for enrollment in a course and the approver is not available should an alternate approver be designated and if so, at what level, which part of the organization, for how long, etc.
- If approvals are denied, should an appeal mechanism be implemented?
- Should review functions be denied to certain groups of users?
- What types of review functions should be enabled and if so, what rights should be associated (i.e. read only or full functionality?) with a particular review right?
- Should inter-departmental reviews and approvals be allowed and if so, should restrictions be imposed?

This is a complex matter that may require an organization:

- Balance control against resource constraints
- Ascertain the potential impact on business relationships with external training providers (e.g. if review rights encompass approvals for external training and your organization has certain contractual obligations to an external provider)
- Consider corporate culture and organizational goals, and has no correct answer.

Review and Approval Rights

(applies to: NetDimensions Talent Suite)

There are many review options available under Talent Suite.
A cursory review of Talent Suite's review functions, available by clicking **Review** in the menu bar, reveals that a systems administrator can establish review functions for:

- Direct Appraiser Review
- Enrollment approvals
- Extension Training Approval
- Appraisal Review
- Supervisor Assessment
- Organization Review
- Assigned Group Review
- Enrollment Wizard
- Report Manager

Breadth of Review

(applies to: NetDimensions Talent Suite)

Finally, if restrictions on review and approvals are to be imposed, then certain decisions are required such as:

1. Which groups of users should be allowed access to review functions in the first place.

2. If a particular role, group of users or individual user is granted review rights, which specific review rights are to be granted.

For example, review rights can be defined by role starting with access to the Review menu then specific tabs in the Review menu such as Organization, Assigned Group, Enrollment Approval, Report Manager

3. Finally, the scope of the review needs to be defined. For example, which aspects of a learner's records can the reviewer view (e.g. Certifications, Records, etc.) and can the reviewer assign modules, access or modify a learner's training plan, etc.

Review Considerations

(applies to: NetDimensions Talent Suite)

In summary, before any review settings an organization's management needs to assess:

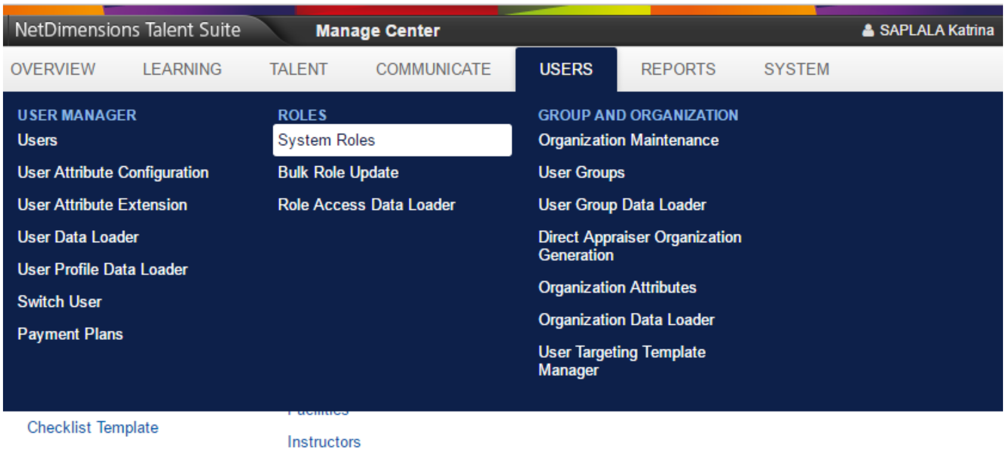
Item No.	Description
1	**Will approval and review functions be required?**
2	**If yes, which levels of an organization can review and approve:**
	1. Course enrolment 2. Exams 3. Certifications 4. Other Refer below for review options
3	**Enrollment Reviews**
	• For appraises • External Training • Organization level • Groups • Alternate approvers • Appeal mechanism • Notification mechanism
4	**Breadth of review**
	1. Groups 2. Individuals 3. Roles
5	**Review rights**
	Review Menu Organization Review Organization Review Direct Appraiser Review Group Review Instructor Enrollment Approval Billing Review Report Manager
6	**Scope of Review**

	Review Records/Transcript Review Skills Review Certifications Review Accounts Biography Assign Module Training Plan Career Development Center Learning Path
	1. Individuals 2. Roles

Accessing Role Permissions

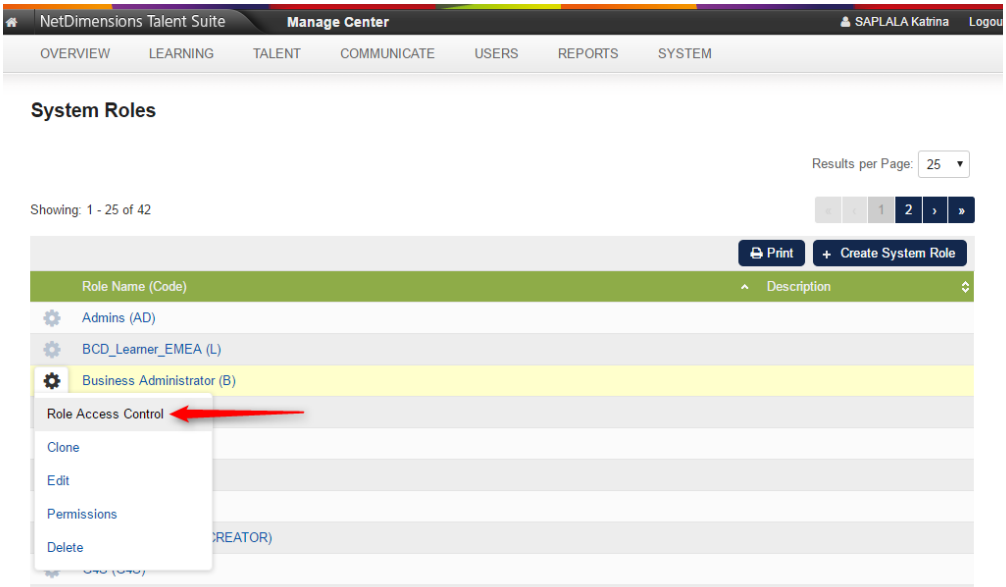
To review and/or update the access permissions for various roles:

1.Access **Manage Center > Users > System Roles**

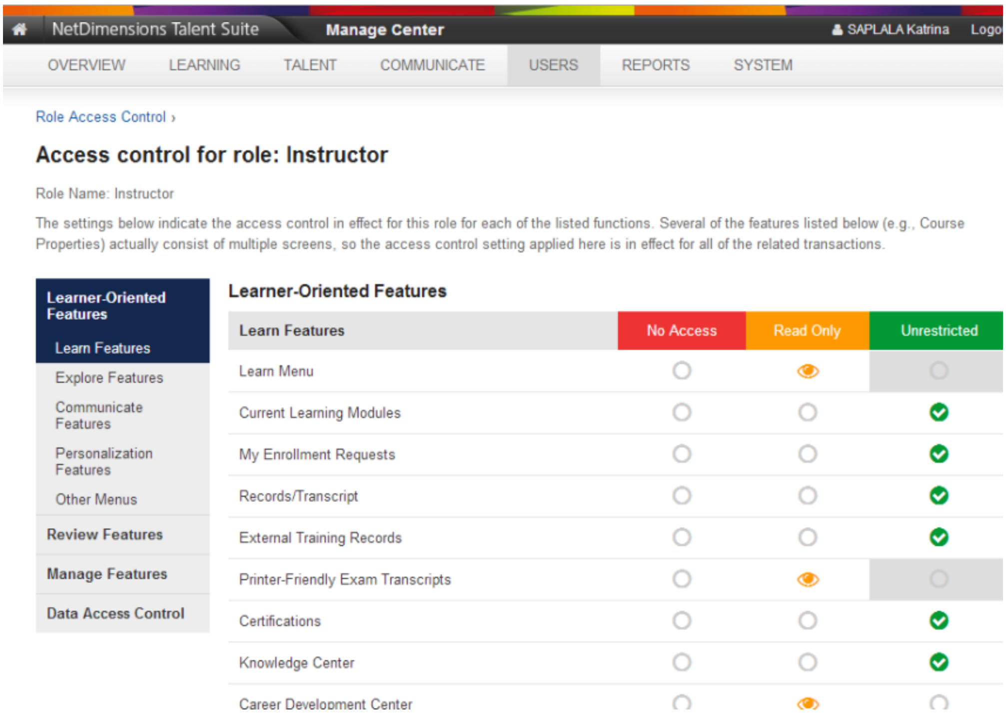


Note: You can also scroll down to the Users section and then click the System Roles on the list.

2. Click the Gear icon and select **Role Access Control.**



3.The **Access Control for <role name>** appears. This is a long screen and you may need to scroll down to locate the features for which you want to modify access control.



4.Scroll down and update the role access rights to individual functions as needed.

5.After you have finished updating role permissions, click Update Access Control Settings at the bottom of the screen.

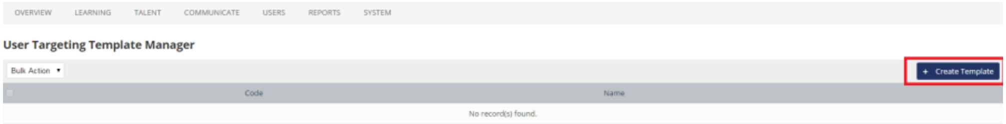
6.The Talent Suite returns an acknowledgement. Click Back to return to the Access Control for Role: <role> screen.

Note: These changes will take effect immediately but you may need to refresh the screen to update it with the changes.

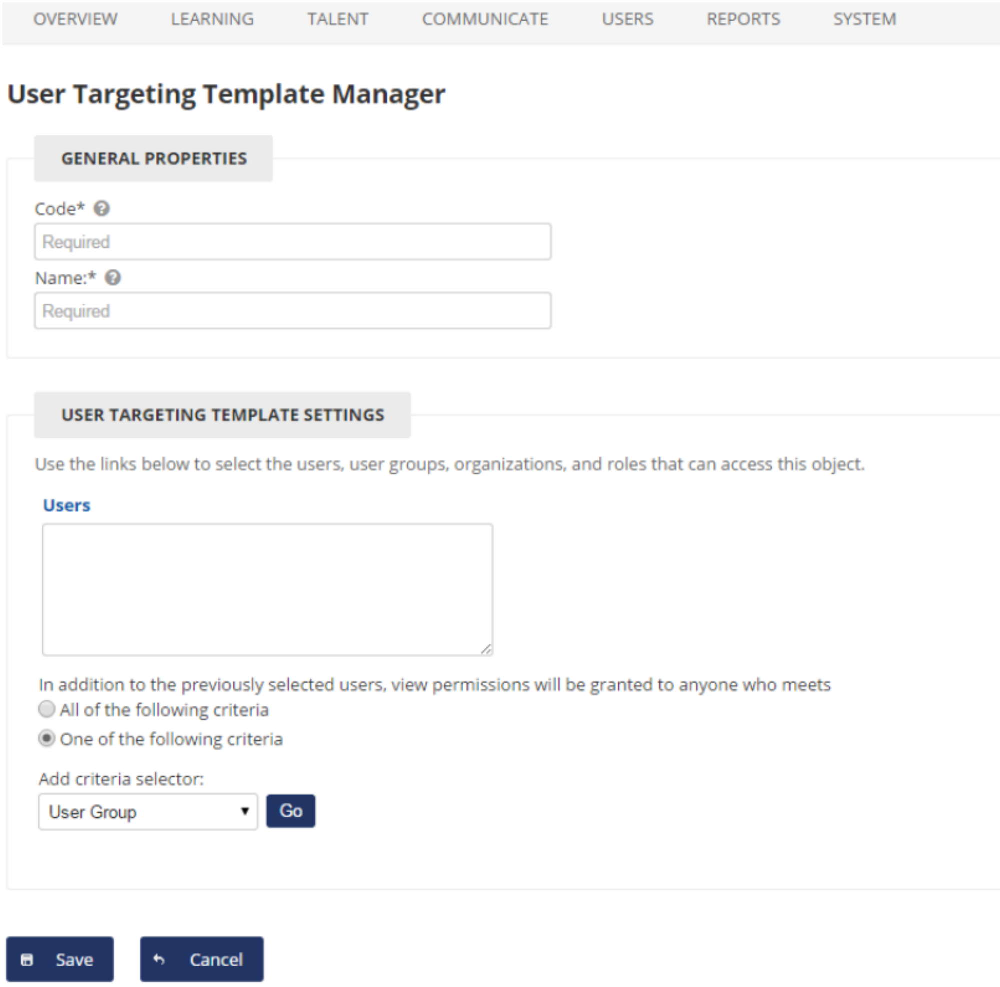
Setting Up a Targeting Template

Often, Administrators just need to configure access rights or targeting with the same set of criteria on different objects. There is a great use case to reuse the configured targeting as template on the different objects, this will save considerable administration time especially if it can be done in bulk upload.

A new menu to manage such templates is accessible via **Manage Center > Users > Group and Organization** which is shown below.



Once a template is created, just like for setting up the targeting or permissions on an object, the same set of targeting criteria can be used for setting up the desirable targets as a template. The template itself can be configured with permissions

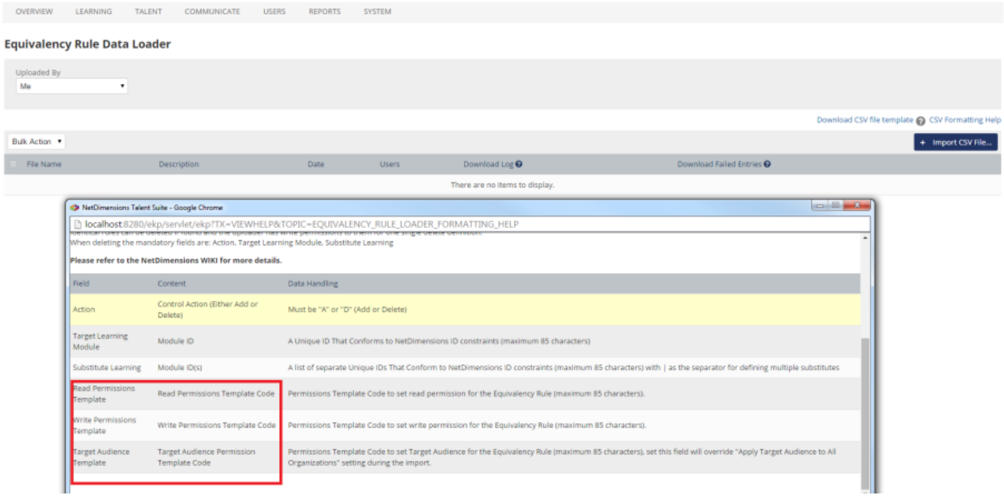


Application of Template in Various Loaders

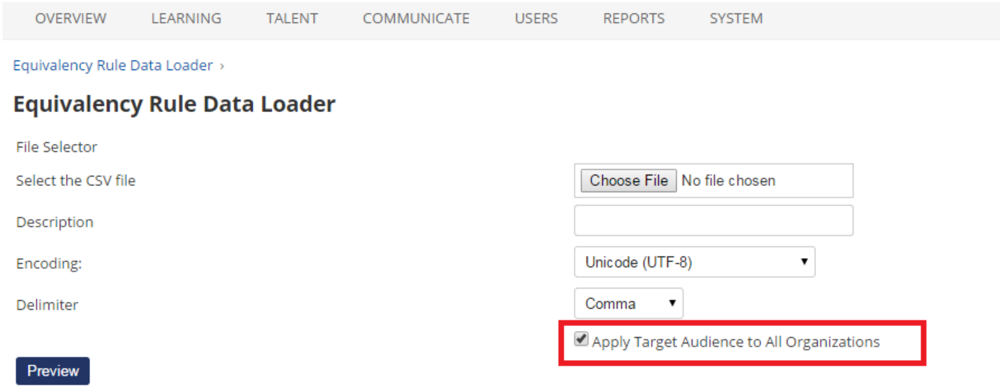
A user targeting template is applicable to the Role Access Data Loader, Question Data Loader, and Equivalency Rule Data Loader for this release. This concept will be extended to other loaders providing the same convenience to administrators in future releases.

In order to use a template in the Data Loader, the person performing the upload needs to have at least Read permission on the template. There are three new columns added to the Equivalency Rule Data

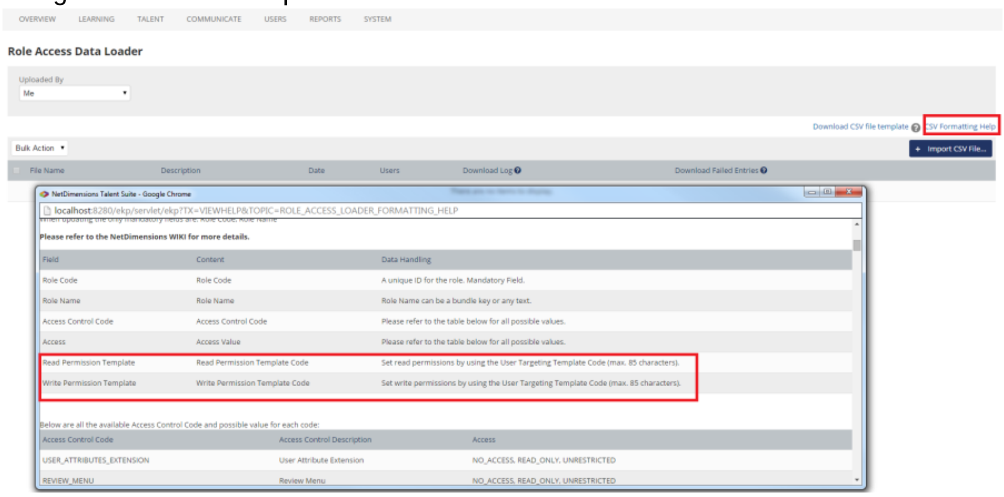
Loader for setting the Read permissions, Write permissions and the Target Audience on a rule. The template code needs to be provided and the criteria set in the nominated template will be copied and used to replace as the corresponding permission/targeting settings.



If specific template criteria are used on the Target Audience of a rule, even if the Apply All Organizations checkbox is checked for the upload, the template criteria will be updated instead.



Similarly, the Read and Write Permission Template columns are added to the Question Data Loader. If no template is defined then it still uses the selected default permission setting for new questions for the upload. Read and Write columns are also added to the Role Access Data Loader, it is meant to configure the read/write permission access for the role when used in the loader.

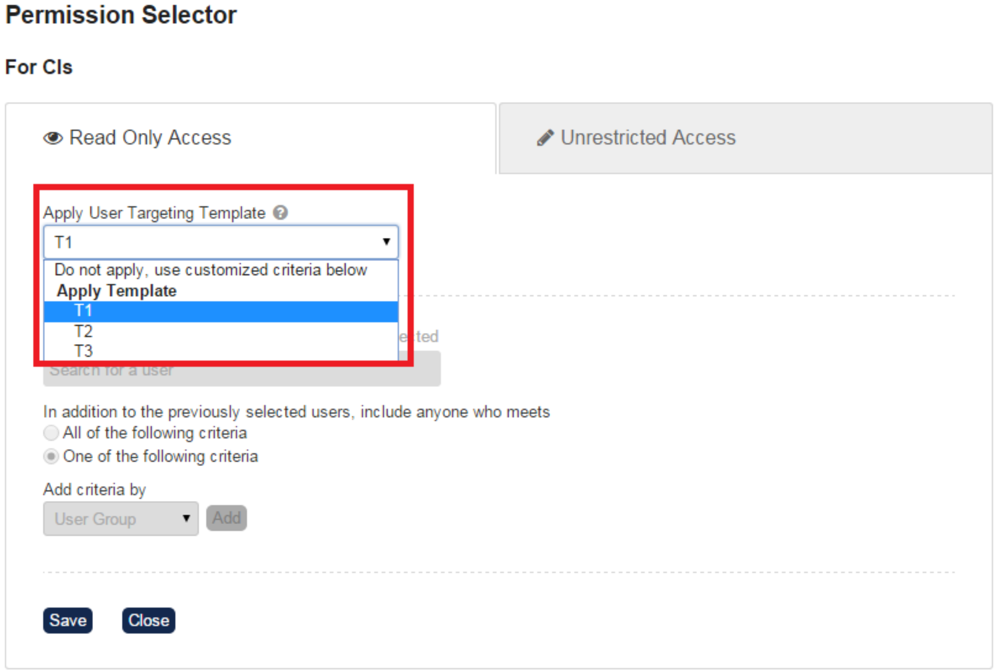


User Targeting Template Enhancements

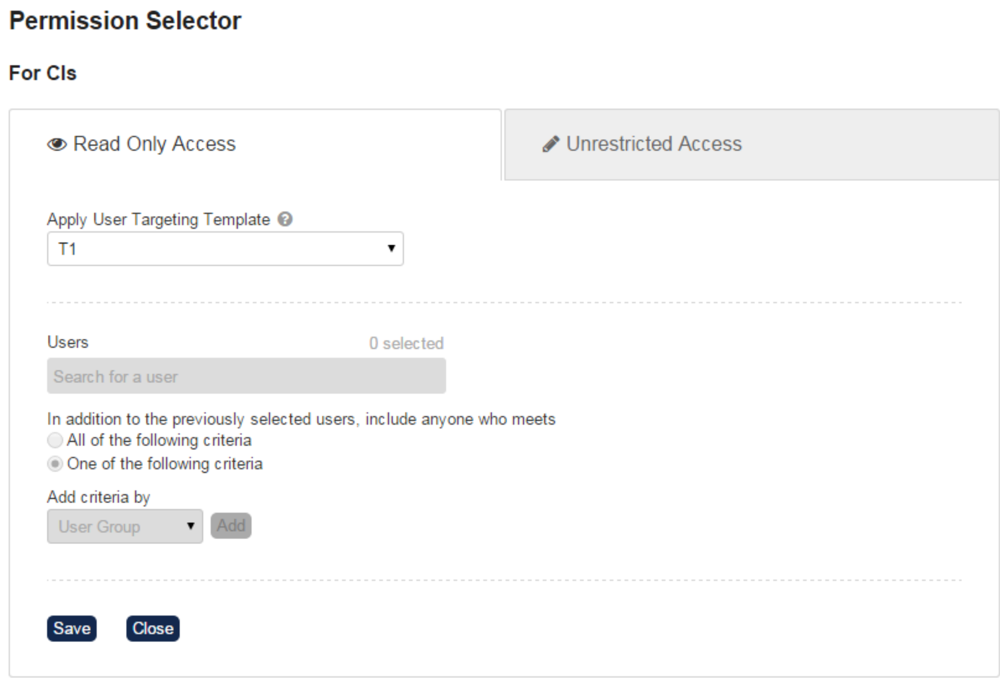
For each system object, basically the permissions or target audience have to be configured to determine who should have access or be targeted to the object. It would be tedious to repeat configuring the same set of settings for different objects. Hence, a User Targeting Template has been enhanced that can be applied to the access/targeting settings for different objects.

Permission/Targeting Administration Application

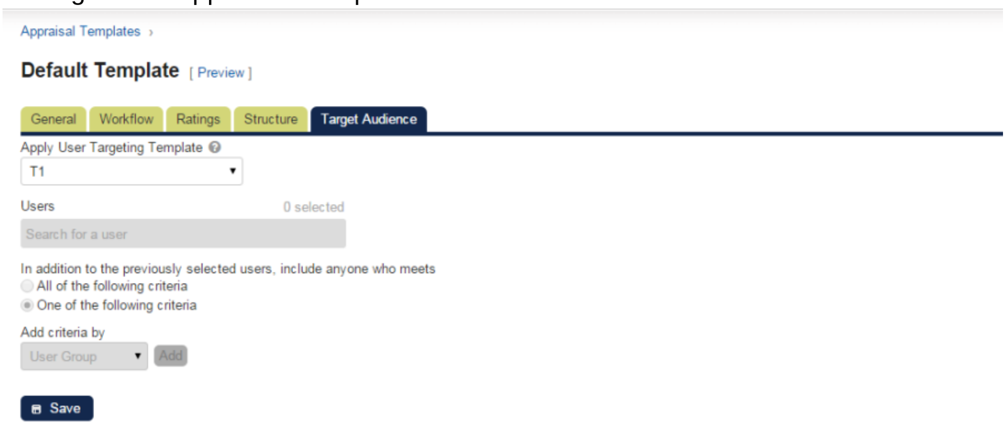
On the Permission Selector or Target Audience Selector, there is now a drop down that allows the selection of a user targeting template for the read or write permission/target audience settings. It would inherit the pre-configured settings from the template, if there's a change of settings in the template, it would be applied to the object that is using the template.

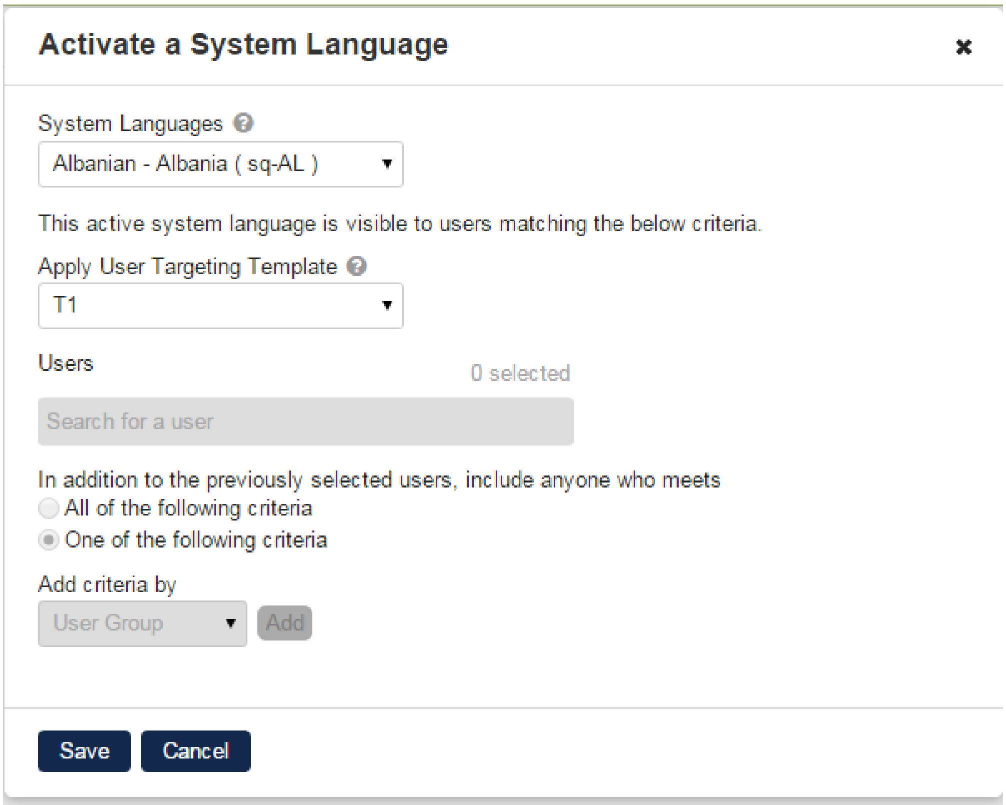


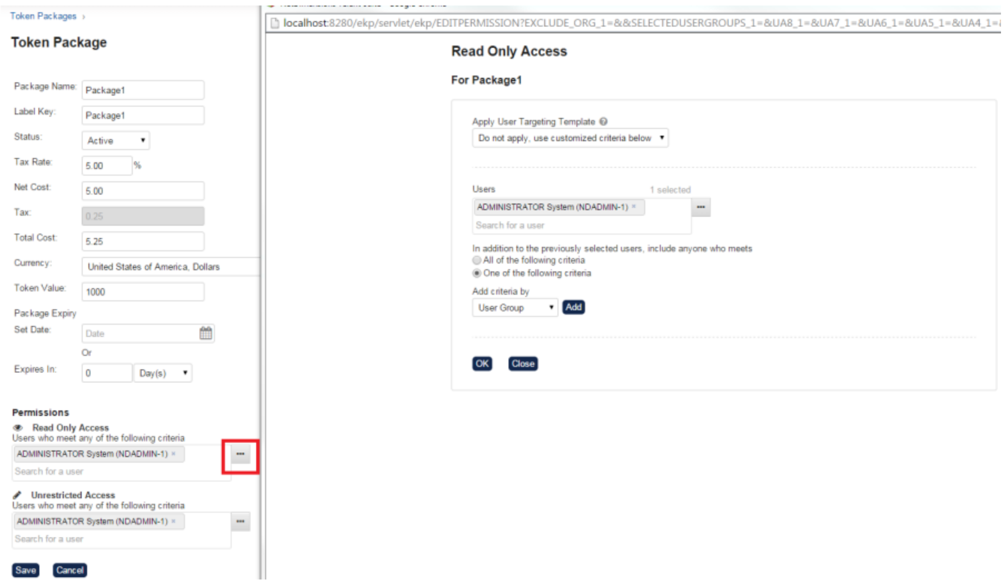
Once a template is selected, any existing criteria selections will be grayed out and are not used for access considerations but the template settings would be used instead with warning. Additional settings can not be added to what the template offers already.



Beside the standard Permission Selector that supports the selection of a User Targeting Template, special areas like the Appraisal Target Audience, Activate a System language, and Create Token Package also support this template selection.







New Template Flags Included in Various Loaders

A user targeting template was applied to the Role Access Data Loader, Question Data Loader, and Equivalency Rule Data Loader by inheriting the settings from the template as an one-off action for the upload, but this is different from assigning a template to be used. This has been extended to support the concept of assigning a template for these CSV loaders by introducing new columns for each of these loaders to do this as well as to support the old behavior for backward compatibility, namely to copy or link template settings.

- **Role Access Data Loader**

In order to assign a template as permission settings for a user role using the Data Loader, the person performing the upload needs to have at least the Read permission on the template. There are two new columns added to the Role Access Data Loader for applying the template as Read or Write permission as well as the mode of how it is being applied.

1. AssignReadTemplate
2. AssignWriteTemplate

The template code needs to be provided to determine how the criteria set in the specified template will be used, either as

1. "L" - Linked to the user targeting template as the permission targeting criteria or
2. "C" - To completely copy and replace the permission settings on this object using the current configured settings from the user targeting template

- **Equivalency Data Loader**

There are three new columns added to the Equivalency Rule Data Loader for applying the template as Read or Write permission as well as the mode of how it is being applied.

1. AssignReadTemplate
2. AssignWriteTemplate
3. AssignTargetAudienceTemplate

The template code needs to be provided to determine how the criteria set in the specified template will be used, either as

1. "L" - Linked to the user targeting template as the permission targeting criteria or
2. "C" - To completely copy and replace the permission settings on this object using the current configured settings from the user targeting template

- **Question CSV Loader**

There are two new columns added to the Question CSV Loader for applying the template as Read or Write permission as well as the mode of how it is being applied.

1. AssignReadTemplate
2. AssignWriteTemplate

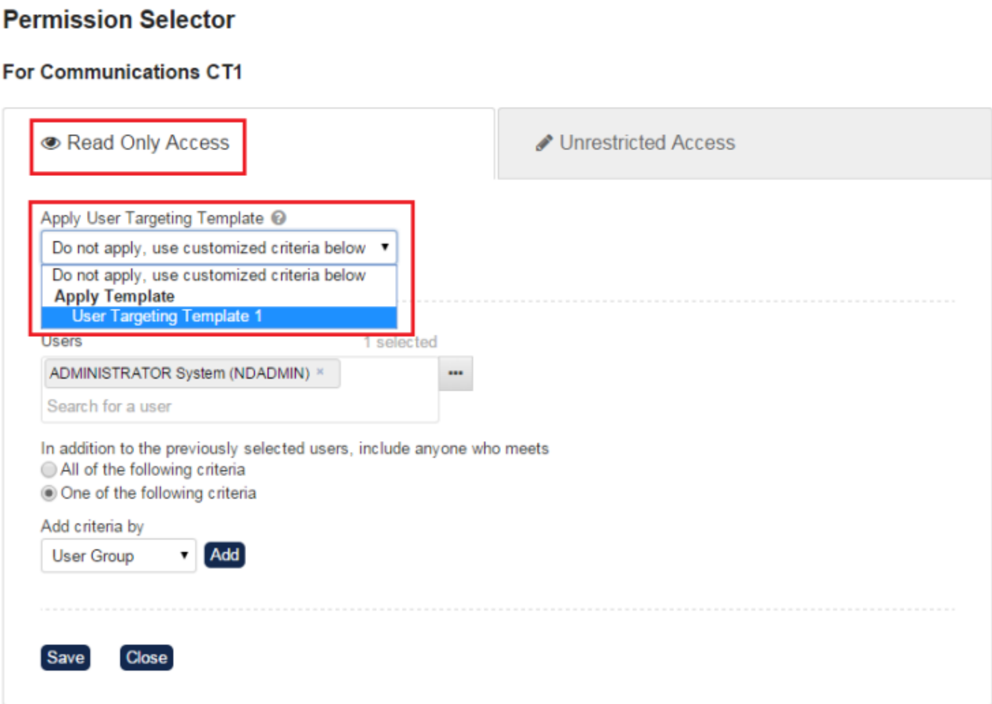
The template code needs to be provided to determine how the criteria set in the specified template will be used, either as

1. "L" - Linked to the user targeting template as the permission targeting criteria or
2. "C" - To Completely copy and replace the permission settings on this object using the current configured settings from the user targeting template

AssignReadTemplate	User Targeting Template Action	"L" - to link to the user targeting template as the permission targeting criteria. "C" - to completely copy and replace permission settings on this object using the current configured settings from the user targeting template.	C
AssignWriteTemplate	User Targeting Template Action	"L" - to link to the user targeting template as the permission targeting criteria. "C" - to completely copy and replace permission settings on this object using the current configured settings from the user targeting template.	C

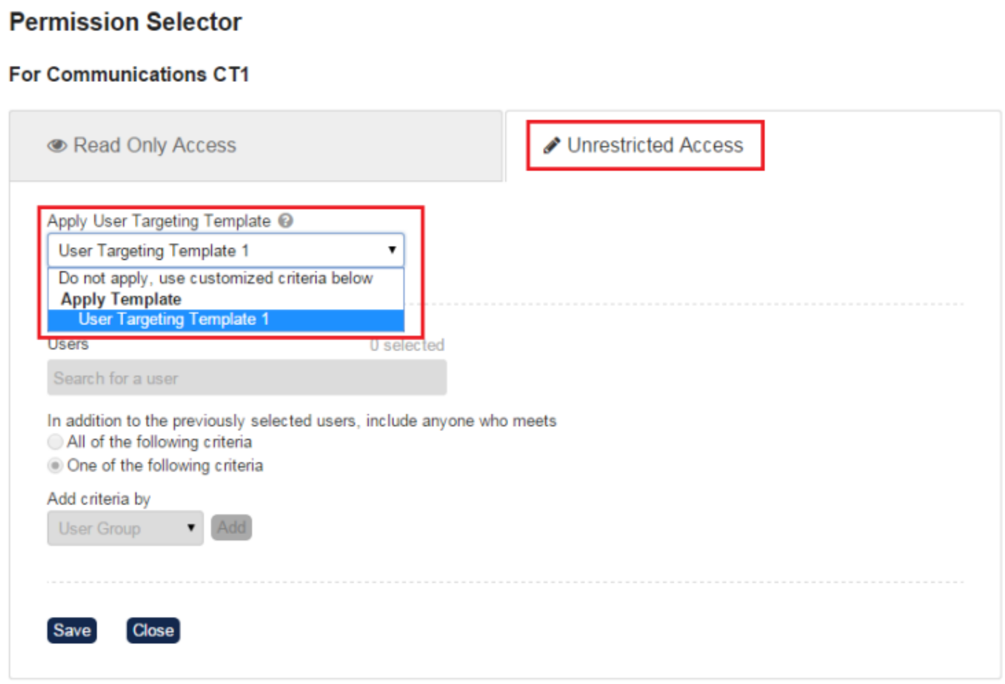
- **AssignReadTemplate**

AssignReadTemplate can be used in applying Read Only Access Permission.



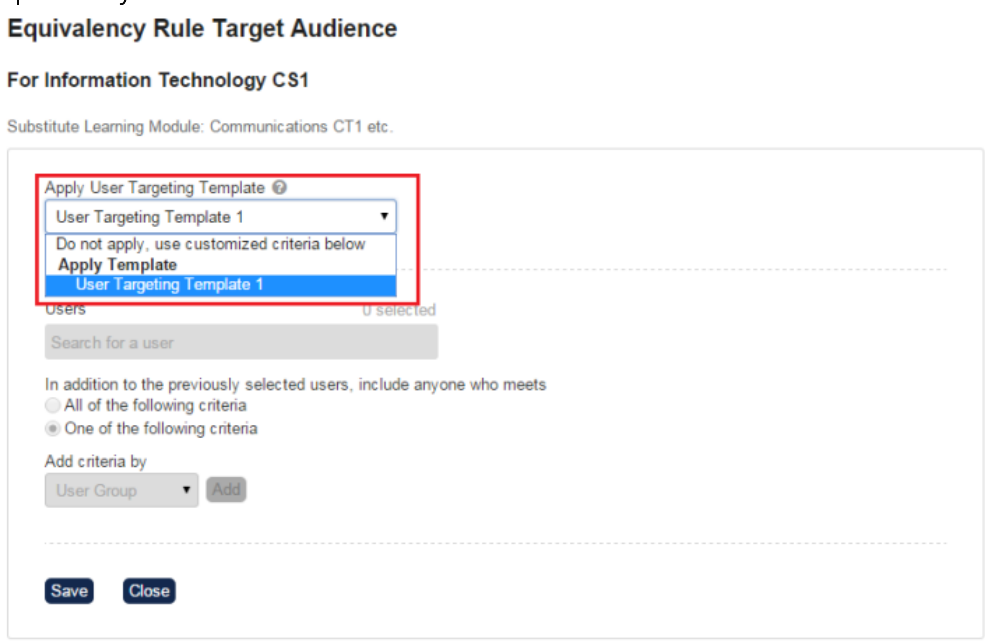
- **AssignWriteTemplate**

AssignWriteTemplate can be used in applying Write Permission.



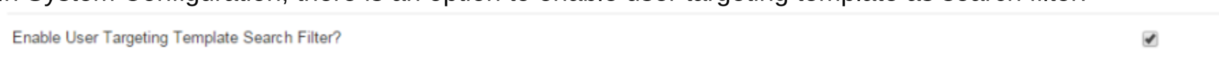
- **AssignTargetAudienceTemplate**

AssignTargetAudienceTemplate can be used for applying the criteria to the targeted audience in equivalency.



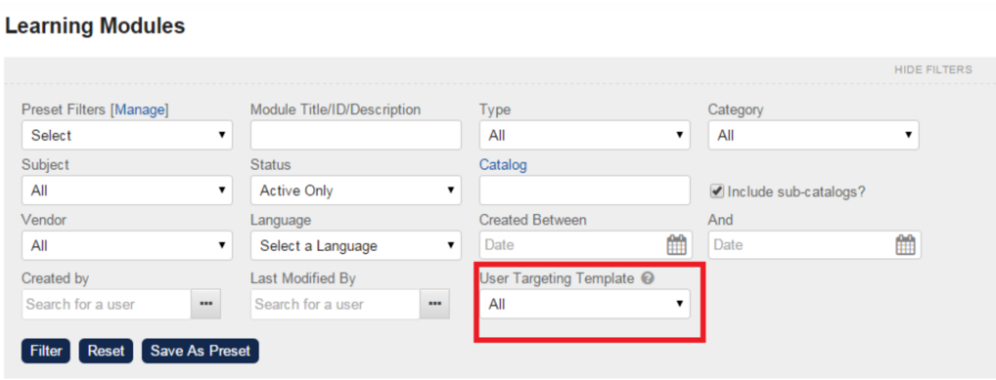
Search Filter

In System Configuration, there is an option to enable user targeting template as search filter:

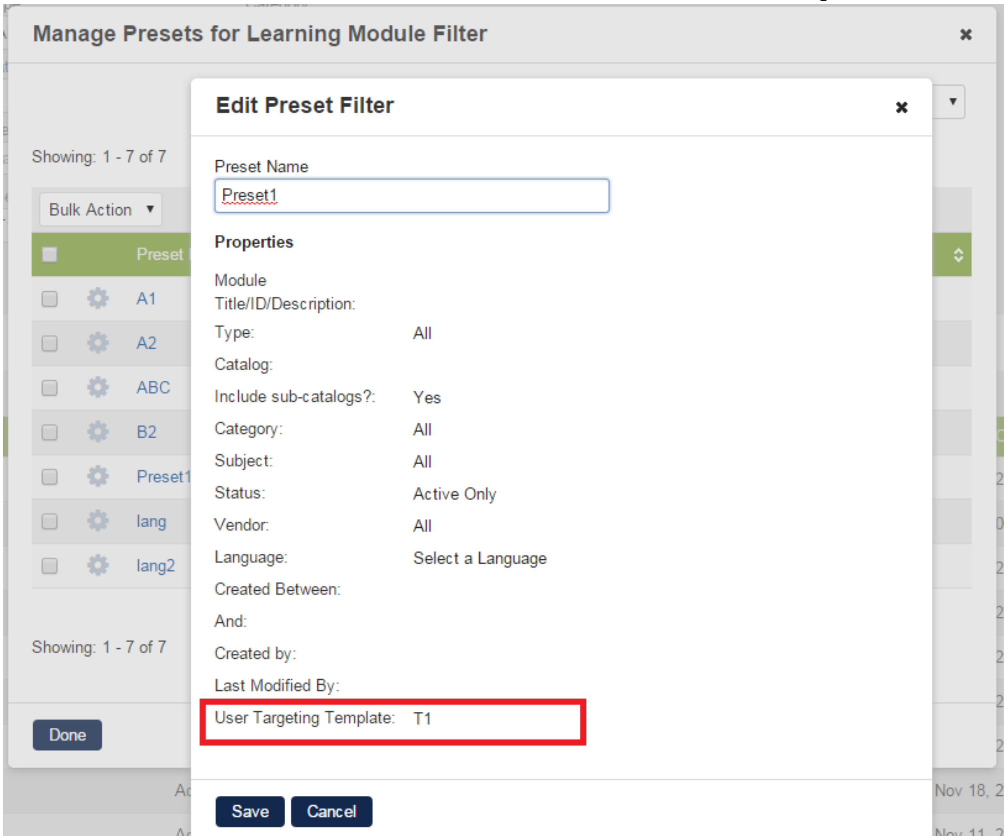


If enabled, the User Targeting Template search filter appears on searches such as Learning Modules, Teach Session Administration, Email Templates, and Job Profile Catalog. The filter can be used to search by a User Targeting Template used as either read or write permission targeting criteria for the object.

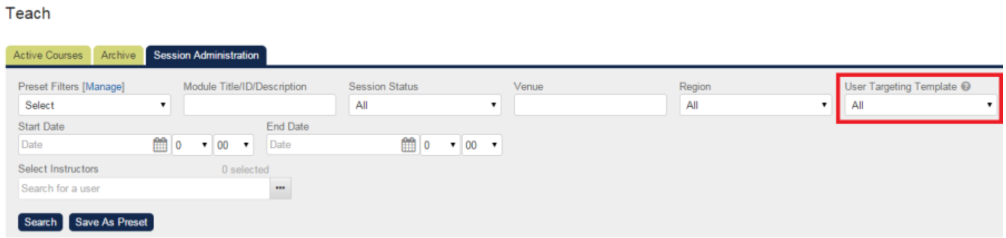
- **Learning Modules**



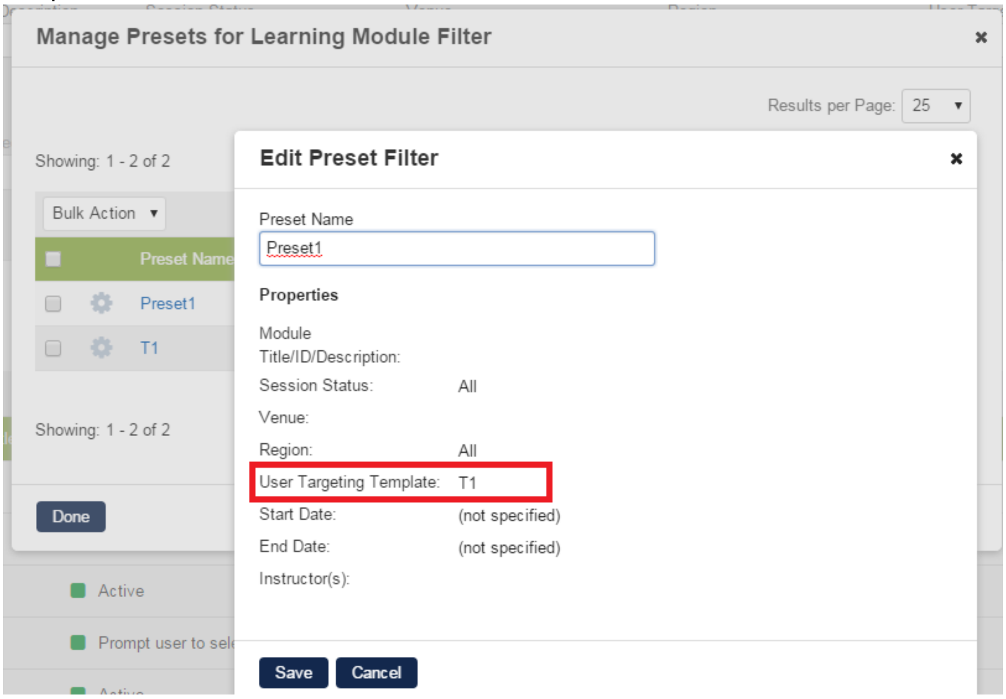
When searching learning modules with the user targeting template filter, it only considers module-level (NOT session-level) permission settings of learning modules. Moreover, User Targeting Template search filter selected value can be saved into a Preset for the Learning Modules search.



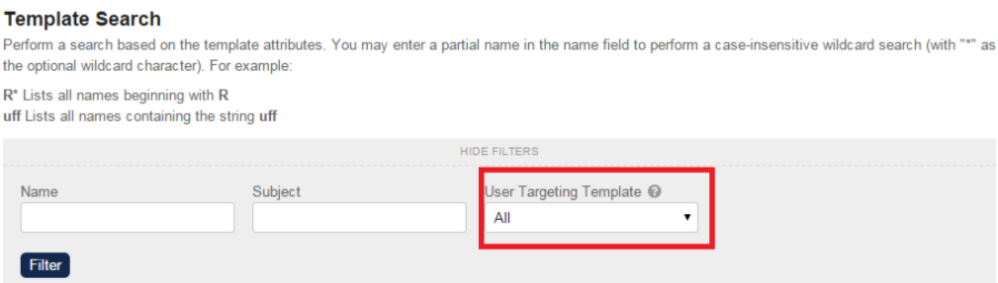
- **Teach Session Administration**



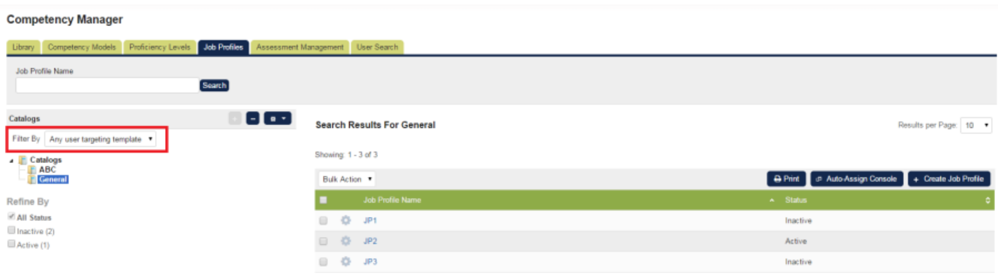
For Teach Session Administration, the new template filter considers both module-level and session-level read/write permission settings of learning modules. Moreover, the User Targeting Template search filter selected value can be saved into a Preset for Teach Session Administration.



- **Email Template**



- **Job Profile**



Review Features - Access Rights

Review features are likely to be granted to managers and instructors so that they can review various types of user data. You can configure access to functions in or access to:

- Enrollment Approval
- Participant Review
- Organization Review
- Instructor Review
- Department Review
- Manager Review

Review Features

Review Features	No access	Read only	Unrestricted
Review Menu	○	○	✔
Organization Review	○	○	✔
Overall Status	○	○	✔
Instructor	○	👁	○
Detailed Review by Instructor	○	○	✔
Enroll Participant From Teach Review	○	○	✔
Report Manager	○	👁	○
Dashboard	○	○	✔
Direct Appraiser Review	○	○	✔
Appraisal Search	○	○	✔
Group Review	○	○	✔
Task Approval	○	○	✔
Enrollment Approval	○	○	✔
Withdrawal Approval	○	○	✔
Ext. Training Approval	○	○	✔
Certification Approval	○	○	✔
Supervisor Assessment	○	○	✔
Enrollment Wizard	○	○	✔
Review Enrollment	○	○	✔

You can specify access rights to:

Review Menu	If you specify *No Access* for this option the role will not have access to Review.
Organization Review	If you specify *No Access* for this option, the role will not have access to the Organization Review screen and the Organization Review icon will not appear in the Review screen.
Instructor	If you specify *No Access* for this option, the role will not have access to the Teach menu.
Detailed Review by Instructor	
Report Manager	If you specify *No Access* for this option, the role will not have access to the Report Manager screen. The Report Manager item will not appear in the Manage menu.
Review Records/Transcript	If you specify *No Access* for this option the role will not have access to a participant's Records/Transcripts screen and the Records/Transcripts icon will not appear in the Participant Review screen.
Dashboard	If you specify *No Access* for this option the role will not have access to Dashboard.
Direct Appraiser Review	If you specify *No Access* for this option, the role will not have access to the Manager Review screen and the Manager Review icon will not appear in the Review screen.
Appraisal Search	If you specify *No Access* for this option the role will not have access to Dashboard.
Group Review	If you specify *No Access* for this option, the role will not have access to the Department Review screen and the Department Review icon will not appear in the Review screen.
Enrollment Approval	If you specify *No Access* for this option, the role will not have access to the Enrollment Approval screen and will thus be unable to approve or deny enrollment requests. The Enrollment Approval icon will not appear in either the Review or the Participant Review screens.
Ext. Training Approval	This item controls whether the Ext. Training Approval tab is available under the Review menu.
Supervisor Assessment	This item controls whether the Supervisor Assessment tab is available under the Review menu. In providing access to the above menus, you should consider the nature and responsibilities of the role. For example, roles without organizational, group or direct report responsibilities probably should not have access to the Organization, Department or Manager screens. Persons responsible for approving enrollments but who may not have managerial responsibilities should be allowed access to Enrollment Approval but perhaps not the Organization, Department or Manager screens.
Enrollment Wizard	Must be set to Unrestricted in order for the user to access the 'Enrollment Wizard' tab in the Review section of NetDimensions Performance.

Change Enrollment Status	Must be set to Unrestricted in order for the user to select 'Change Enrollment Status' from the Action field in the Enrollment Wizard screen and when selected, additional options become available

Review Submenu Features - Access Rights

Review Submenu Features	No access	Read only	Unrestricted
Learning Center Summary	○	○	✔
Review Records/Transcript	○	○	✔
Review External Training History	○	○	✔
Review Skills	○	○	✔
Review Certifications	○	○	✔
Review Accounts	○	○	✔
Review Enrollment Requests	○	○	✔
Profile Summary	○	○	✔
Employment Information	○	○	✔
Contact Details	○	○	✔
Resumé	○	○	✔
Education	○	○	✔
Work History	○	○	✔
Language Skills	○	○	✔
User Attribute Extension	○	○	✔
Relocation Interests	○	○	✔
Assign Module	○	○	✔
Training Plan	○	○	✔
Competency Assessments	○	○	✔
Career Development Center1	○	○	✔

You can specify access rights to:

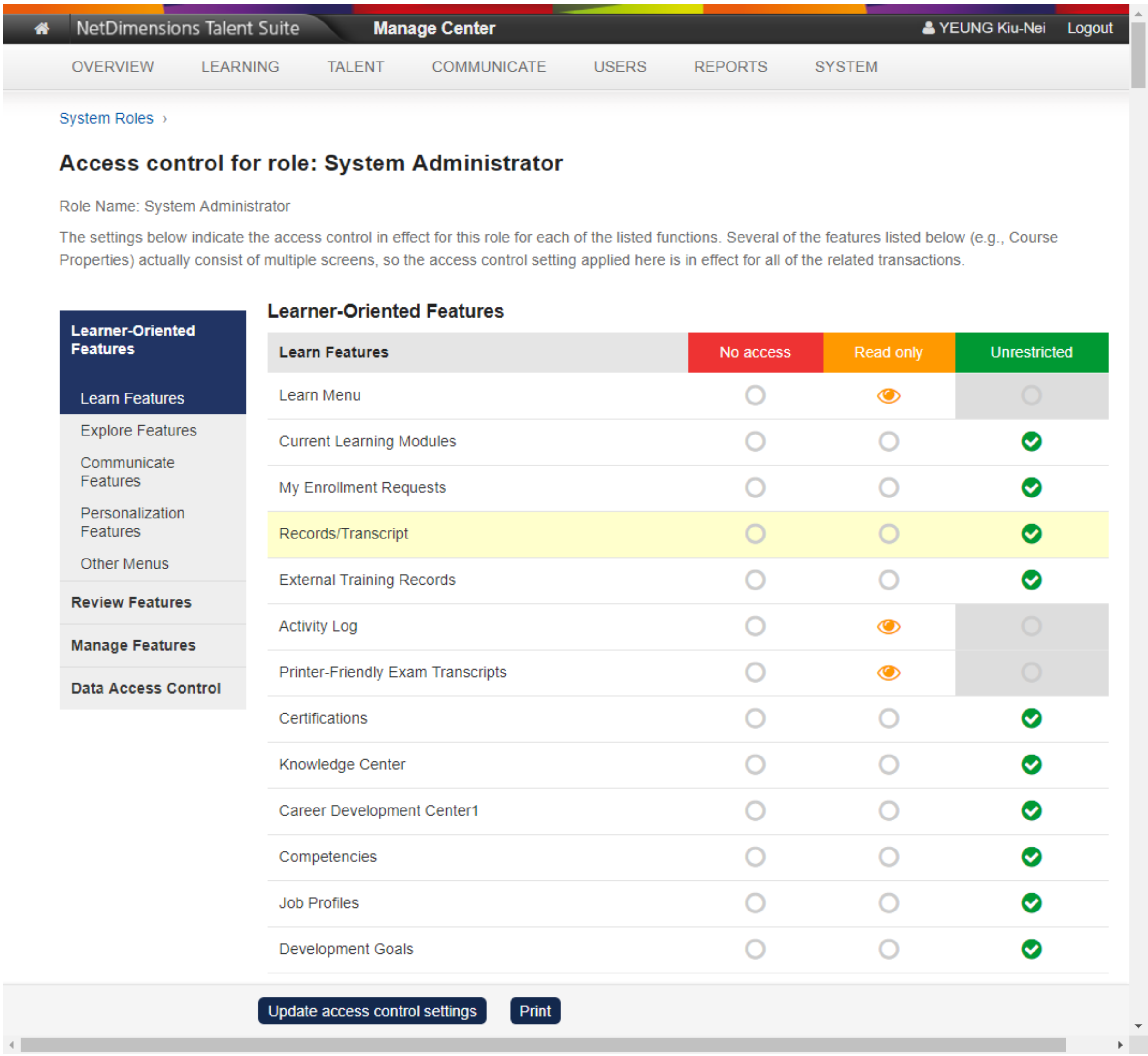
Learning Center Summary	
Review Skills	If you specify *No Access* for this option, the role will not have access to the Skills Test Results screen and the Skills Tests icon will not appear in the Participant Review screen.
Review Records/Transcript	If you specify *No Access* for this option the role will not have access to a participant's Records/Transcripts screen and the Records/Transcripts icon will not appear in the Participant Review screen.
Review Certifications	If you specify *No Access* for this option, the role will not have access to the Certifications Awarded screen and the Certifications Awarded icon will not appear in the Participant Review screen.
Review Accounts	If you specify *No Access* for this option, the role will not have access to the Account Details screen and the Accounts icon will not appear in the Participant Review screen.
Review Enrollment Requests	If you specify *No Access* for this option, the role will not have access to the Account Details screen and the Accounts icon will not appear in the Participant Review screen.
Profile Summary	If you specify *No Access* for this option, the role will not have access to view the profile summary of his/her appraissee and the Personal Profile Summary will not appear in the Career Center Summary
Employment Status	If you specify *No Access* for this option, the role will not have access to view the employment status of his/her appraissee and the Employee Status will not appear in the Career Center Summary
Contact Details	If you specify *No Access* for this option, the role will not have access to view the contact details of his/her appraissee and the contact details will not appear in the Career Center Summary
Education History	If you specify *No Access* for this option, the role will not have access to view the education history of his/her appraissee and the Education History will not appear in the Career Center Summary
Review Work History	If you specify *No Access* for this option, the role will not have access to view the work history of his/her appraissee and the Work History will not appear in the Career Center Summary
Assign Module	If you specify *No Access* for this option, the role will not have access to the Search Catalog Assignments screen and the manager/reviewer will not be able to assign the course to his/her direct report. In addition, the Assign Learning Program / Module icon will not appear in the Participant Review screen.
Training Plan	If you specify *No Access* for this option, the role will not have access to the Training Plan screen and the Training Plan icon will not appear in the Participant Review screen. The role will be unable to create training plans.

Competency Assessments	If you specify *No Access* for this option, the role will not have access to view the education history of his/her appraissee and the Education History will not appear in the Career Center Summary
Task Approval	If you specify *No Access* for this option, the role will not have access to approved task learning type and the Task Approval will not appear under the Work Space menu.
Career Center Summary	This item controls whether the Career Development Center tab is available when review records for a learner using any of the available review functions.
Competencies	If you specify *No Access* for this option the role will not have access to Dashboard.
Job Profiles	If you specify *No Access* for this option the role will not have access to Dashboard.
Goals	If you specify *No Access* for this option, the role will not have access to view the goals assigned to his/her appraissee and the Goals tab will not appear in the Career Center
Review My Files	If you specify *No Access* for this option, the role will not have access to view the files of his/her appraissee
Performance Appraisal	If you specify *No Access* for this option, the role will not have access to view the performance appraisal of his/her appraissee and the Performance Appraisal tab will not appear in the Career Center
Training Gap Analysis	If you specify *No Access* for this option, the role will not have access to view the Training Gap Analysis of his/her appraissee and the Training Gap Analysis tab will not appear in the Career Center
Learning Path	If you specify *No Access* for this option, the role will not have access to view the Learning Path of his/her appraissee and the Learning Path tab will not appear in the Learning Center Summary
SCORM Global Objectives	If you specify *No Access* for this option, the role will not have access to view the SCORM Global Objectives of his/her appraissee and the Learning SCORM Global Objectives tab will not appear in the Learning Center Summary
Learning Group	If you specify *No Access* for this option, the role will not have access to view the Learning Group of his/her appraissee and the Learning Group tab will not appear in the Learning Center Summary

Learner Oriented Features

(applies to NetDimensions Talent Suite)

Learn Features



You can specify access rights to:

Learn Menu / Current Learning Modules	If you specify *No Access* for this option the role will not have access to the Learn screen, the Learn button will not appear and the Current Learning Modules hyperlink will not appear in the Home page.
My Enrollment Request	By specifying *No Access* for this option, the role will not be able to access the My Enrollment Request under the Learning Center.
Records/Transcript	If you specify *No Access* for this option, the role will not have access to transcript records and the Records/Transcript icon will not appear in the screen.
Printer-Friendly Test Transcripts	If you specify *No Access* for this option, the role will not have access to printerfriendly exam transcripts.
Certifications	If you specify *No Access* for this option the role will not be unable to review the certificates he/she has attained and the Certificates Achieved icon will not appear in the screen.
Knowledge Center	By specifying *No Access* for this option, the role will not be able to access the Knowledge Center from the Home page.
Career Development Center	By specifying *No Access* for this option, the role will not be able to access the Career Development Center.
Competencies	By specifying *No Access* for this option, the role will not be able to access the competencies under the Career Development Center.
Job Profiles	By specifying *No Access* for this option, the role will not be able to access the Job Profiles under the Career Development Center.
Goals	By specifying *No Access* for this option, the role will not be able to access the My Performance Goal under the Career Center.
Overall Status	Read Access enables the Overall Status menu item (non-tabbed skins) or tab (tabbed skins). Unrestricted permits users to make appropriate changes to their status for enrolled modules.
Skills	If you specify *No Access* for this option, the role will be unable to review his/her results of the skills tests he/she had taken and the Skills Tests Results icon will not appear in the screen.
Training Plan	By specifying *No Access* for this option, the role will not be able to view his/her training plan and the Training Plan icon will not appear in the screen.
Training Gap Analysis	By specifying *No Access* for this option, the role will not be able to access the My Trainign Gap Analysis under the Career Center.
Accounts	By specifying *No Access* for this option, the role will not be able to review his/her Account Status and the Accounts icon will not appear in the screen.
Payment History	By specifying *No Access* for this option, the role will not be able to view the payment history.

Personal Calendar	By specifying *No Access* for this option, the role will not be able to view his/her Personal Calendar and the Personal Calendar icon will not appear in the screen nor on the Home Page.
Personal Notebook	By specifying *No Access* for this option, the role will not be able to view his/her Personal Notebook. In non-tabbed skins, the Personal Notebook item will not appear in the Learn menu.
Peer Comments	By specifying *No Access* for this option, the role will not be able to view or enter comments regarding a course in the Peer Comments screen from the Home page.
Performance Appraisal	By specifying *No Access* for this option, the role will not be able to access the Performance Review function in the Career Development Center.
Learning Path	By specifying *No Access* for this option, the role will not be able to access the Learning Path function.
My Files	By specifying *No Access* for this option, the role will not be able to access the My Files function.

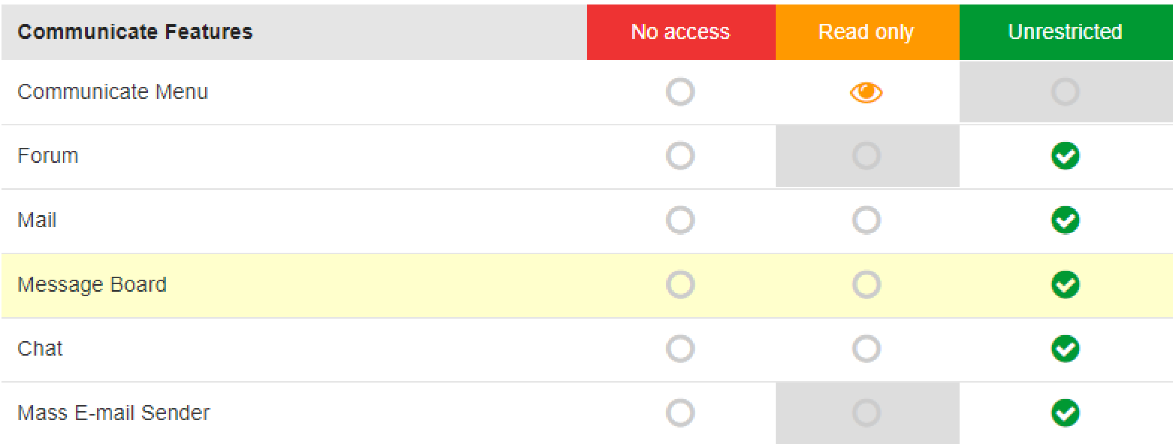
Explore Features

Explore Features	No access	Read only	Unrestricted
Catalog Menu			
Catalog Browser			
Allow Session Enrollment			
News Search			
Skills Assessments			
Certification Programs			
Know Your Colleagues			

You can specify access rights to:

Catalog Menu	If you specify No Access for this option the role will not have access to the Explore screen and the Explore button will not appear in the screen.
Catalog Browser	If you specify *No Access* for this option, the role will not have access to the Search Catalog and the Catalogs icon will not appear in the screen.
Allow session enrollment	If you specify *No Access* for this option, the role will not be able to enroll in modules/programs from the catalog description pages.
News Search	If you specify *No Access* for this option, the role will not be able to access News records and the News Search icon will not appear in the screen.
Skills Assessments	If you specify *No Access* for this option, the role will not be able to access Skills Assessments, take skills tests and the Skills Assessments icon will not appear in the screen.
Certification Programs	If you specify *No Access* for this option, the role will not be able to review available certification programs with individual requirements for obtaining certifications. Furthermore, the Certification Programs icon will not appear in the screen.
Know Your Colleagues	If you specify *No Access* for this option, the role will not be able to review the online records of other users on the system and the Know Your Colleagues icon will not appear in the screen.

Communicate Features



You can specify access rights to:

Communicate Menu	If you specify No Access for this option the role will not have access to the Communicate screen.
Forum	If you specify *No Access* for this option, the role will not have access to the Discussion Forum and the Discussion Forum icon will not appear in the screen nor in the Home page.
Mail	If you specify *No Access* for this option, the role will not have access to Mail functions and the Mail icon will not appear in the screen. If you do not specify Unrestricted Access for this option, the role will not be able to send mail messages.
Message Board	If you specify *No Access* for this option, the role will not be able to access the Message Board and the Message Board icon will not appear in the screen nor will the Message Board hyperlink appear in the Home Page.
Chat	If you specify *No Access* for this option, the role will not be able to access Chat Rooms and the Chat icon will not appear in the screen nor will the Chat Room hyperlink appear in the Home Page.
Mass E-mail Sender	If you specify *No Access* for this option, the role will not have access to the Mass Email Sender functions and the Mass Email Sender icon will not appear in the screen. If you do not specify Unrestricted Access for this option, the role will not be able to send mass email messages.

Personalization Features

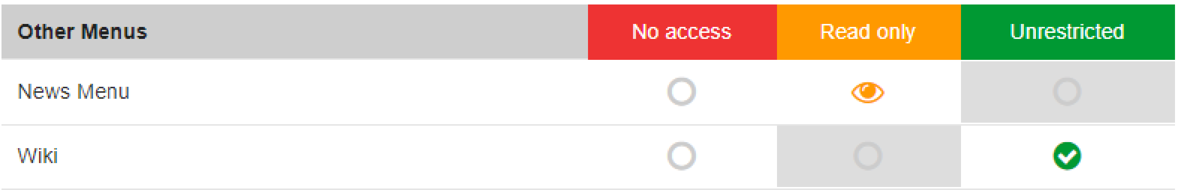
Personalization Features	No access	Read only	Unrestricted
Preferences Menu	○	◉	○
User Preferences	○	○	✔
Address Change	○	○	✔
Profile Summary	○	○	✔
Employment Information	○	○	✔
Contact Details	○	○	✔
Resumé	○	○	✔
Education	○	○	✔
Work History	○	○	✔
Language Skills	○	○	✔
User Attribute Extension	○	○	✔
Relocation Interests	○	○	✔
Password Change	○	○	✔
My Orgs	○	○	✔
Terms of Use	○	○	✔

You can specify access rights to:

Preferences Menu	If you specify No Access for this option the role will not have access to the Personalize screen
User Preferences	If you specify No Access for this option, the role will not have access to the User Preferences screen and the User Preferences icon will not appear in the screen. If you specify Read Only access for this option, the role will not be able to alter his/her user preferences (e.g. language, skin selection, display of animated graphics, etc.)
Address Change	If you specify No Access for this option, the role will not be able to modify his/her address details and the User Administration icon will not appear in the screen. If you specify Read Only access for this option, the role will not be able to alter his/her address details (name, title, address, phone, etc.)
Profile Summary	If you specify *No Access* for this option, the profile summary information will not be shown in My Profile tab.
Employment Status	If you specify *No Access* for this option, the employment status will not be shown in My Profile tab.

Contact Details	If you specify *No Access* for this option, the contact details will not be shown in My Profile tab.
Education History	If you specify *No Access* for this option, the education history will not be shown in My Profile tab.
My Work History	If you specify *No Access* for this option, the work history will not be shown in My Profile tab.
Biography	If you specify No Access for this option, the role will not be able to access the Biography screen and the Biography icon will not appear in the screen. If you specify Read Only access for this option, the role will not be able to alter his/her details or upload pictures to his/ her online profile
Password Change	To allow users to change their passwords, specify Unrestricted access for this option. Note that in some cases you would not want to allow users to change their passwords. These include where the Talent Suite authenticates users against an external system (e.g. LDAP) or receives passwords from another system.
My Orgs	Turns this tab on Learner Oriented Features

Other Menus



You can specify access rights to:

News Menu	Controls the News menu item for various left/top navigation bar in the main menu
Wiki	Enables access to the Wiki.

Manage Features

Manage Menu

Manage Features	No access	Read only	Unrestricted
Manage Menu	○	○	✔
News Manager	○	○	✔
Repository Manager	○	○	✔
mEKP Administration	○	○	✔
Appraisal Manager	○	○	✔
Terms of Use Manager	○	○	✔

For access to Management-oriented features (that you might grant to managers, instructors, etc.) you can configure access to functions in or access to the:

- News Manager
- Catalog Manager
- Object Installation Manager
- Skills Manager
- Test Manager
- User Manager
- Community Manager
- Report Manager
- Systems Administration/and/or their associated functions.

You can specify access rights to:

Manage Menu	If you specify *No Access* for this option the role will not have access to the Manage screen (and the Manage button will not appear) nor would the role be able to access: 1. Catalog Manager 2. User Manager 3. Test Manager 4. Community Manager 5. News Manager 6. Skills Manager 7. Report Manager 8. Object Installation Manager 9. Systems Administration Manager or their associated functions from the Manage screen (though the role could, for example, access the screens if he/she knew the relevant URL)
News Manager	If you specify *No Access* for this option, the role will not have access to the News Manager screen and the News Manager icon will not appear in the screen. The role would not able to access News Manager functions (from the News Manager screen) such as creating, editing, deleting or viewing an article in the library or the addition, deletion or modification of news categories.

Repository Manager	If you specify *No Access* for this option, the role will not be able to access the Repository Manager from Explore.
mEKP Administrator	If you specify *No Access* for this option, a fully functional standalone version of NetDimensions Performance. that can be packaged on various storage media and distributed for usage on a desktop or laptop computer will not be possible.
Appraisal Manager	If you specify *No Access* for this option, a fully functional standalone version of NetDimensions Performance. that can be packaged on various storage media and distributed for usage on a desktop or laptop computer will not be possible.

Compliance Analytics	No access	Read only	Unrestricted
Compliance Analytics	○	○	✔

Compliance Analytics	If you specify *No Access* for this option, a fully functional standalone version of NetDimensions Performance. that can be packaged on various storage media and distributed for usage on a desktop or laptop computer will not be possible.

Catalog Manager Features

(applies to NetDimensions Talent Suite)

Catalog Manager Features	No access	Read only	Unrestricted
Catalog Manager (Assessment Workflow Manager, Web Catalogs, and Virtual Classroom Account Setup)	○	○	✓
Catalog Editor - Module Management	○	○	✓
Catalog Editor - Session Management	○	○	✓
Catalog Configuration	○	○	✓
Transcript Status Manager	○	○	✓
Catalog Structure	○	○	✓
Class Resource Manager	○	○	✓
Migrate Learning Object ID	○		✓
E-mail Template Editor	○	○	✓
Enrollment Policy Editor	○	○	✓
Additional Enrollment Information	○	○	✓
Courseware Editor	○	○	✓
View Course Coupon	○	👁	
Edit Course Coupon	○		✓
Auto/Group Enroll	○	○	✓
Auto-Enroll Console	○	○	✓
Catalog Assignment CSV Loader	○	○	✓
Course CSV Loader	○	○	✓
Program CSV Loader	○	○	✓

You can specify access rights to:

Catalog Manager	If you specify *No Access* for this option the role will not have access to the Catalog Manager screen
Catalog Editor - Module Management	If you specify *No Access* for this option the role will not have access to Catalog Editor - Module Management
Catalog Editor - Session Management	If you specify *No Access* for this option the role will not have access to Catalog Editor - Session Management

Catalog Configuration	This controls access to the catalog structure (creating new catalogs & organizing the structure of catalogs)
Catalog Structure	This controls access to catalog configuration settings (e.g. subjects and vendors)
Cost Accounting	Controls the Cost Accounting menu item in the Catalog Configuration Manager Menu Read-only access will disable the "add/edit" buttons in the screen
Facility Maintenance	Controls the Facility Maintenance menu item in the Catalog Manager Menu Read-only access will disable the "add/edit" buttons in the Facility Maintenance screen
Migrate Learning Object ID	If you specify *No Access* for this option, the role will not have access to the Migrate Learning Object ID screen, and the Migrate Learning Object ID icon will not appear in the Catalog Manager screen. If you specify Read Only access, the role will be able to access the screen but not alter Learning Object IDs.
E-mail Template Editor	If you specify *No Access* for this option, the role will not have access to the Email Template Editor screen and the Email Template Editor icon will not appear in the Catalog Manager screen. If you specify Read Only access, the role will be able to access the screen but not alter Email Templates.
Enrollment Policy Editor	If you specify *No Access* for this option, the role will not have access to the Enrollment Policy Editor screen and the Enrollment Policy Editor icon will not appear in the Catalog Manager screen. If you specify Read Only access, the role will be able to access the screen but not alter Enrollment Policies.
Courseware Editor	If you specify *No Access* for this option, the role will not have access to the Courseware Manager screen and the Courseware Manager item will not appear in the Manage menu. If you specify Read Only access, the role will be able to access the screen but not alter courses.
View Course Coupon	If you specify *No Access* for this option, the role will not have access to the Course Coupon tab under the Catalogs menu.
Edit Course Coupon	If you specify *No Access* for this option, the role will not have access to the Course Coupon step in the Catalog Editor (under Session Properties).
Auto/Group Enroll	If you specify *No Access* for this option, the role will not have access to the Auto-Enroll Console menu item will not appear in the Catalog Manager menu. If you specify Read Only access, the role will be able to access the screen but not alter autoenroll settings.
Auto-Enroll Console	If you specify *No Access* for this option, the role will not have access to the Auto-Enroll Console screen menu item will not appear in the Catalog Manager menu. If you specify Read Only access, the role will be able to access the screen but not alter autoenroll settings.
Catalog Assignment CSV Loader	If you specify *No Access* for this option, the role will not have access to Manage Features the Catalog Assignment CSV Loader screen and the Catalog Assignment CSV Loader menu item will not appear in the Catalog Manager menu.

Course CSV Loader	If you specify *No Access* for this option, the role will not have access to CSV Course Loader.
Program CSV Loader	If you specify *No Access* for this option, the role will not have access to Program CSV Course Loader.
External Training CSV Loader	If you specify *No Access* for this option, the role will not have access to External Training CSV Course Loader.
Content Package, AICC Course Structure, Resource, Web Catalogs and PENS import	If you specify *No Access* for this option, the role will not have access to Content Package, AICC Course Structure, Resource, Web Catalogs and PENS import
Integrated Instructor Calendar	If you specify *No Access* for this option, the role will not have access to Integrated Instructor Calendar
Training Records CSV Loader	If you specify *No Access* for this option, the role will not have access to Training Records CSV Loader

Exam Manager Features

(applies to NetDimensions Talent Suite)

Exam Manager Features	No access	Read only	Unrestricted
Exam and Question Manager	○	○	✓
Exam Utilities	○	○	✓
Exams	○	○	✓
Questions	○	○	✓
Exam Configuration	○	○	✓
Data Loader	○	○	✓
Exam Review	○	○	✓
Allow the user to modify the exam after the end date.	○	○	✓
Exam Generator	○	○	✓
Exam Participants Review	○	○	✓
Automatic Exemption Policies	○	○	✓
Question Attributes	○	○	✓

You can specify access rights to:

Exam Manager	If you specify *No Access* for thisoption the role will not have access to the Exam Manager screen.
Exam Utilities	If you specify *No Access* for this option the role will not have access to the Exam Utilities screen, and the Exam Utilities menu item will not appear in the Manage menu.
Exam Template Editor	If you specify *No Access* for this option the role will not have access to the Exam Template Editor tab under the Exam Manager menu.
Question Editor	If you specify *No Access* for this option, the role will not have access to the Question Editor and the Question Editor icon will not appear in the Exam Manager screen. If you specify Read Only access the role will not be able to create nor edit questions.
Exam Configuration	If you specify *No Access* for this option, the role will not have access to the Exam Configuration screen and the Exam Configuration icon will not appear in the Exam Manager screen. Ifyou specify Read Only access, the role will be able to access the Test Configuration but will not be able to add, update or delete: o Test Pools o Test Display Styles o Question Pools.

Data Loader	If you specify *No Access* for this option, the role will not have access tothe Question Data Loader in the Exam Utilities screen. If you specify Read Only access the role will not be able to use the QTI Importer or CSV Loader.
Exam Review	If you specify *No Access* for this option, the role will not have access to the Question Review screen.
Allow the user to modify the exam after the end date.	If you specify *No Access* for this option, the role will not have access to the Exam Generator screen in the Exam Manager screen. If you specify Read Only access the role will not be able to generate exams
Exam Generator	If you specify *No Access* for this option, the role will not allow you to generate an instance of an exam and wrap it with an online course.
Exam Participants Review	If the permission is „*No Access*", the new menu item will not be shown at the top of the Exam Template Editor to allow the role view the list of participants of the exam as well as delete some of the exam records to reset the number of attempts for participants. If the permission is „Read Only", the user will be able to view the list of exam participants but will not be able to delete any exam attempts. If the permission is „Unrestricted", the user will be able to view the list of exam participants as well as deleting participants' exam attempts.

User Manager Features

(applies to NetDimensions Talent Suite)

User Manager Features	No access	Read only	Unrestricted
User Manager	○	○	✔
Users	○	○	✔
Role Permissions	○	○	✔
User ID Change	○	–	✔
User Attributes Configuration	○	○	✔
User Data Loader	○	○	✔
User Profile Data Loader	○	○	✔
User Groups	○	○	✔
User Group Data Loader	○	○	✔
Organization Data Loader	○	○	✔
Bulk Role Update	○	–	✔
Role Access Data Loader	○	○	✔
Report Manager	○	👁	–
User Targeting Template Manager	○	○	✔

You can specify access rights to:

User Manager	If you specify *No Access* for this option the role will not have access to the User Manager screen
User Editor	If you specify *No Access* for this option, the role will not have access to the User Editor and the User icon will not appear in the User Manager screen. If you specify Read Only access the role will be unable to create or edit user accounts. If this role will be involved in uploading accounts through the CSV data loader, the role should be allowed Unrestricted access for this function.
Role Permissions	If you specify *No Access* for this option, the role will not have access to the Role List Configuration or Role Access Control screens and the respective icons will not appear in the User Manager screen. If you specify Read Only access the role will be unable to edit role permission and the role will be unable to add, update or delete new role definitions.

User Attributes Configuration	If you specify *No Access* for this option, the role will not have access to the User Attribute Maintenance screen and the User Attribute Configuration icon will not appear in the User Manager screen. If you specify Read Only access the role will be unable to create or edit user attribute entries.
User Data Loader	If you specify *No Access* for this option, the role will not have access to the User Data Loader screen and the User Data Loader menu item will not appear in the User Manager menu. If you specify Read Only access the role will be unable to upload CSV files.
User Groups	If you specify *No Access* for this option, the role will not have access to the User Manage Features Groups screen and the User Groups menu item will not appear in the User Manager menu. If you specify Read Only, access the role will be able view the list of user groups and their memberships. They will not be able to view the permissions of a user group.
User Group Data Loader	If you specify *No Access* for this option, the role will not have access to the User Group Data Loader screen and the User Group Data Loader menu item will not appear in the User Manager menu. If you specify Read Only access the role will be unable to upload CSV files.
Bulk Role Update	If you specify *No Access* for this option, the role will not have access to the Bulk Role Update screen and the Bulk Role Update menu item will not appear in the User Manager menu.

Community Manager Features

(applies to NetDimensions Talent Suite)

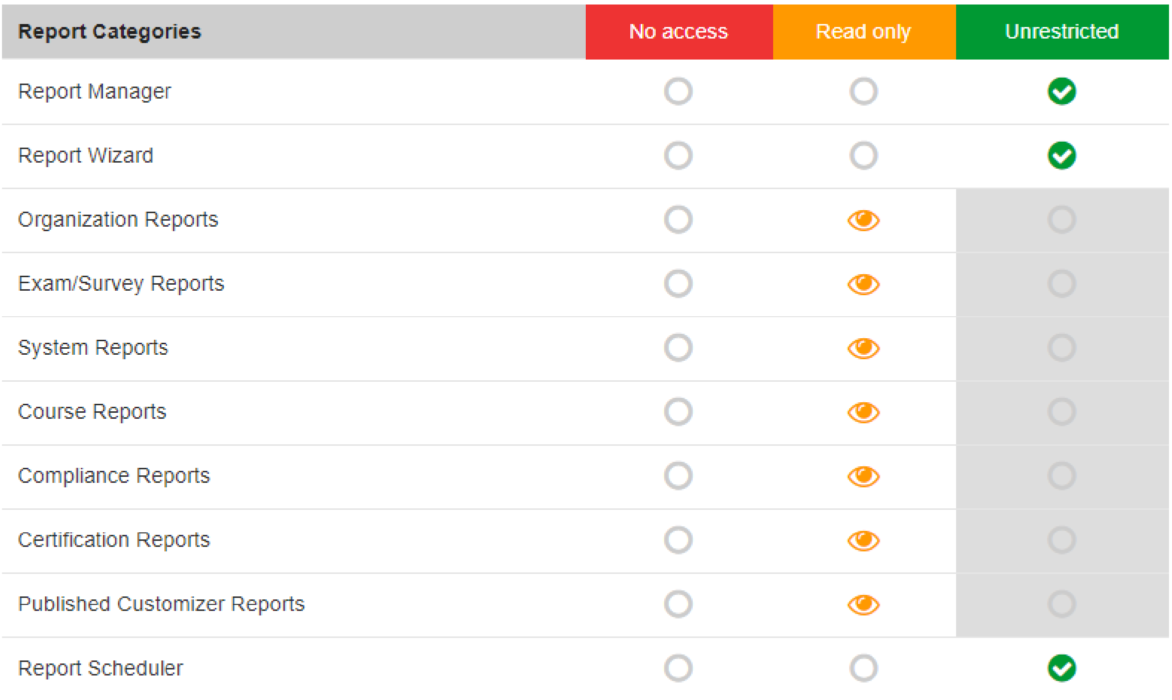
Community Manager Features	No access	Read only	Unrestricted
Community Manager	○	👁	○
Discussion Forum Categories	○	○	✔
Discussion Forums	○	○	✔
Chat	○	○	✔
Message Board	○	○	✔

You can specify access rights to:

Community Manager	If you specify *No Access* for this option the role will not have access to the Community Manager screen
Forum	If you specify *No Access* for this option, the role will not have access to the Discussion Forum Maintenance screen and the Discussion Forum Maintenance icon will not appear in the Community Manager screen. If you specify Read Only access the role will be unable to create or maintain forums.
Chat	If you specify *No Access* for this option, the role will not have access to the Chat Room Maintenance screen and the ChatRoom Maintenance icon will not appear in the Community Manager screen. If you specify Read Only access the role will be unable to create or maintain Chat rooms.
Message Board	If you specify *No Access* for this option, the role will not have access to the Message Board Maintenance screen and the Message Board Maintenance icon will not appear in the Community Manager screen. If you specify Read Only access the role will be unable to create new messages or edit existing ones. In configuring this option, you should carefully consider who should be allowed to create and broadcast messages.

Report Categories

(applies to NetDimensions Talent Suite)



Report Categories	No access	Read only	Unrestricted
Report Manager			
Report Wizard			
Organization Reports			
Exam/Survey Reports			
System Reports			
Course Reports			
Compliance Reports			
Certification Reports			
Published Customizer Reports			
Report Scheduler			

You can specify access rights to:

Report Manager	If you specify *No Access* for this option the role will not have access to the Report Manager screen.
Report Wizard	The Report Wizard allows users (with access rights) to create custom reports. If you specify *No Access* for this option, the role will not have access to the Report Wizard screen and the Report Wizard icon will not appear in the Report Manager screen. If you specify Read Only access the role will be unable to make any changes or additions in these screens.
Organization Reports	If you specify *No Access* for this option, the role will not have access to the Standard Reports screen for Organization Reports and the Organization Reports icon will not appear in the Report Manager screen. Course Reports If you specify *N o Access* for this option, the role will not have access to theStandard Reports screen for Learning Reports and the Learning Reports icon will not appear in the Report Manager screen.
Course Reports	If you specify *No Access* for this option, the role will not have access to course reports screen and the Course Reports will not appear in the Report Manager screen.
Compliance Reports	If you specify *No Access* for this option, the role will not have access to the Compliance Reports screen Compliance Reports icon will not appear in the Report Manager screen.

Certification Reports	If you specify *No Access* for this option, the role will not have access to the Certification Reports screen and the Certification Reports icon will not appear in the Report Manager screen.
Exam/Survey Reports	If you specify *No Access* for this option, the role will not have access to the Standard Reports screen for Test/ Question reports and the Test/ Manage Features Question Reports icon will not appear in the Report Manager screen.
System Reports	If you specify *No Access* for this option, the role will not have access to the Standard Reports screen for System Activity reports and the System Reports icon will not appear in the Report Manager screen.
Published Customizer Reports	If you specify *No Access* for this option, the role will not have access to the Published Customizer Reports screen and the Published Customizer Reports icon will not appear in the Report Manager screen.
Report Scheduler	If you specify *No Access* for this option, the role will not have access to the Scheduled Reports screen and the Scheduled Reports icon will not appear in the Report Manager screen.

Competency Manager Features

(applies to NetDimensions Performance NetDimensions Learning)

Competency Manager Features	No access	Read only	Unrestricted
Competency Manager	○	○	✔
Competency Assessment Templates	○	○	✔
Competency Library	○	○	✔
Competency Group Editor	○	○	✔
Profile Auto-Assign Console	○	○	✔
Skills Assessment	○	○	✔
Competency Data Loader	○	○	✔
Competency Models	○	○	✔
Proficiency Levels	○	○	✔
Job Profiles	○	○	✔
Job Profile Data Loader	○	○	✔
Active Assessments	○	○	✔
User Search	○	👁	○
Competency Module Expiry Data Loader	○	○	✔
Ad-hoc Competency Assessment Data Loader	○	○	✔

You can specify access rights to:

Competency Manager	If you specify *No Access* for this option the role will not have access to the Competency Manager screen. • If Read Only is specified, only the Proficiency Level and User Search tab is available. • If Unrestricted is specified all features with read only and unrestricted features of Competency Manager will be available.
Competency Assessment Templates	If you specify *No Access* for this option the role will not have access to the Competency Manager screen.
Competency Library	If you specify *No Access* for this option the role will not have access to the Competency Library.

Competency Group Editor	If you specify *No Access* for this option the role will not have access to the Competency Group Editor screen.
Profile Auto-Assign Console	If you specify *No Access* for this option the role will not have access to the Competency Manager screen.
Skills Assessment	If you specify *No Access* for this option, the role will not have access to the Skills screen and the Skills icon will not appear in the Skills Manager screen. If you specify Read Only access the role will be able to access the Skill Details and the Recommendations for Competency Learning screens but will not be able to make any changes or additions in these screens.
Competency Data Loader	If you specify *No Access* for this option, the role will not have access to the Competency Data Loader screen and the Competency Data Loader icon will not appear in the Skills Manager screen. If you specify Read Only access the role will be able to access the Competency Data Loader screen but will be unable to make any deletions, changes or additions.
Competency Models	If you specify *No Access* for this option the role will not have access to the Competency Manager screen.
Proficiency Models	If you specify *No Access* for this option the role will not have access to the Competency Manager screen.
Job Profiles	If you specify *No Access* for this option the role will not have access to the Competency Manager screen.
Active Assessment	If you specify *No Access* for this option the role will not have access to the Active Assessment function.

System Administration

(applies to: NetDimensions Talent Suite)

System Administration	No access	Read only	Unrestricted
System Administration	○	○	✔
Page Statistics	○	○	✔
Transaction Statistics	○	○	✔
Connection Statistics	○	○	✔
Cache Statistics	○	○	✔
User Sessions	○	○	✔
Access Violations	○	○	✔
Screen Layout Manager	○	○	✔
System Configuration	○	○	✔
Broadcast Messenger	○	○	✔
Database Object Statistics	○	○	✔
Switch User	○		✔
Home Page Manager	○		✔
Content Server Configuration	○	○	✔
Login Reminder	○	○	✔
Background Task Monitor	○	👁	
System Language Activation	○	○	✔
HTML Widgets	○		✔

You can specify access rights to:

System Administration	If you specify *No Access* for this option the role will not have access to the System Administration Manager screen.
Page Statistics	If you specify *No Access* for this option, the role will not have access to the System Activity Statistics screen and the System Activity Statistics icon will not appear in the System Administration Manager screen. TX Statistics If you specify *No Access* for this option, the role will not have access to the Transaction Statistics screen and the Transaction Statistics icon will not appear in the System Activity Statistics screen.

Transaction Statistics	If you specify *No Access* for this option the role will not have access to the transaction statistics.
Connection Statistics	If you specify *No Access* for this option, the role will not have access to the Connection Statistics and Connection Status Listing screens. The Connection Statistics icon will not appear in the System Activity Statistics screen. If you specify Read Only access, you will be unable to reset Connection Pool statistics.
Cache Statistics	If you specify *No Access* for this option, the role will not have access to the Object Cache Statistics screen and the Object Cache Statistics icon will not appear in the System Activity Statistics screen. To permit this role to access Object Cache statistics, specify either Read Only or Unrestricted access.
User Sessions	If you specify *No Access* for this option, the role will not have access to the User Sessions screen and the User Sessions icon will not appear in the System Administration Manager screen.
Access Violations	If you specify *No Access* for this option, the role will not have access to the Access Violation Report screen and the Access Violation Report icon will not appear in the System Administration Manager screen. If you specify Read Only access, the role will be unable to clear the Access Violation Report.
Screen Layout Manager	If you specify *No Access* for this option, the role will not have access to the Screen Layout Manager and the Screen Layout Manager icon will not appear in the System Administration Manager screen.
System Configuration	If you specify *No Access* for this option, the role will not have access to the System Defaults Configuration and System Configuration screens. The SystemDefaults Configuration and SystemConfiguration icons will not appear in the System Administration Manager screen. If you specify Read Only access, the role will be not be able to update system defaults nor customize NetDimensions Performance.
Broadcast Messenger	If you specify *No Access* for this option, the role will not have access to the Broadcast Messenger screen and the Broadcast Messenger icon will not appear in the System Administration Manager screen.
Database Object Statistics	If you specify *No Access* for this option, the role will not have access to the Database Object Statistics screen and the Database Object Statistics icon will not appear in the System Statistics screen.
Switch User	This item controls access to the Switch User function under Manage > System Administration Manager > System Support Functions.
Home Page Manager	If you specify *No Access* for this option, the role will not have access to the Home Page Manager and the Home Page Manager icon will not appear in the System Administration Manager screen.
Content Server Configuration	If you specify *No Access* for this option, the role will not have access to the Content Server Configuration screen and the Content Server Configuration icon will not appear in the System Configuration screen.
Login Reminder	If you specify *No Access* for this option, the role will not have access to the Login Reminder screen and the Login Reminder icon will not appear in the System Administration Manager screen.

Note: User roles with a privilege level of 10 (reserved for system administrators) can access and update Debug and Tracing options. Other users, with lower privilege levels, may not see the Debug / Tracing Options icon in the System Administration Manager screen.

Payment Manager

(applies to NetDimensions Talent Suite)

Payment Manager	No access	Read only	Unrestricted
Payment Plans and Optional Payment Items	○	○	✔
Cost Accounting	○	○	✔
Payment History	○	○	✔
Token Packages	○	○	✔
Organization Token Accounts	○	○	✔
Token Account Data Loader	○	○	✔

You can specify access rights to:

Payment Manager	Allows access to the Payment Manager page where can can configure payment and access user payment transaction information. You can then access the following: Payment History Token Packages Organization Token Accounts.
Payment History	When set to "Yes" you can access the user payment transaction information.
Token Packages	When set to "Yes" you can create new Token Packages, edit existing Token Packages and set Permissions on Token Packages.
Organization Token Accounts	When set to "Yes" you can maintain Token Accounts which may be associated with one or more User Organization.
Token Account Data Loader	If you specify *No Access* for this option, the role will not have access to the Token Account Data Loader screen and the Token Account Data Loader menu item will not appear in the Payment Manager menu.

Data Access Control

Highest Visible Organization Level

Data access control is perhaps one of the most important security settings in the NetDimensions Talent Suite. For data access control, you can specify Restricted or Unlimited access within the different levels of your organizational hierarchy.

Basics of Organization Level Limits

- Managers and administrators who can review others need to be limited as to which organization s they have visibility into - this limit controls the "level" of visibility relative to the user's assigned organization structure.
- Visibility is typically enforced by limiting the available orgs that may be selected when running a report or review function.
- A manager who has this limit set to a specific number can see his org branch at that level, and all others below that specific org.
- A manager who has the limit set to "User Org Level (Exclusive)" can see only those below his org.
- A manager who has the limit set to "User Org Level (Inclusive)" can select his org and lower level organization units.

The following control determines the highest visible organization for a role:

Highest Organization Level Visible	A Restricted setting only permits access to data at the (typically) organization, country or department levels to which the user belongs. An Unlimited setting allows access to data from other organizations/countries/departments to be accessed. These settings will affect the options available to the user in areas such as reviewing, reporting and administering user records. For example, if you set Level1 (typically Organization) access to Restricted, the role will only have review access to users within his/her own organization (via the Organization Review screen). Furthermore, in the User Editor and the Organization Maintenance screen of the User Editor the role will only be able to access data for his/her own organization. Note that in addition to the above, the User Editor has a Supervises tab that allows a particular person to be allocated specific sets of departments for review.

Note: If a role has been assigned review privileges for more departments, the role may be able to access data from more than one department even though access has been set to Restricted.

Role General Permissions

Role General Permissions		No	Yes
Allow Look & Feel Change		○	●
Allow Admin Online Help		○	●
Allow Org Maintenance		○	●
Allow Global Upload Maintenance		○	●
Allow Course Deletes		○	●
Allow User Deletes		○	●
Allow User Creation		○	●
Allow Attachment in New Mail Form		○	●
Allow Enrollment Override		○	●
Allow Question Creation		○	●
Allow Question Review		○	●
Allow Question Approval		○	●
Allow Question Open for Editing		○	●
Allow Exam Creation		○	●
Allow Exam Generation		○	●
Allow Exam Grading		○	●
Allow Exam Instance Manager		○	●
Display Exam Password		●	○
Is External Question Approver		●	○
Allow Question Approval Override		○	●
Allow Personal Reminders		○	●
Allow Forum Moderation		○	●
Allow Global Approval		○	●
Allow Exam Remedial Training Comments		●	○
Allow Bulk Session Status Update		○	●
Show Tokens Tab		●	○
Sort the enrolled learning modules list by module title		●	○
Show only top-level learning objects in enrolled learning modules		●	○
Allow Token Manual Adjustment		●	○
Allow User Editor Group View		○	●
Is Organizational External Training Approver		●	○
Allow User Appraisal Administration		●	○
Allow Review Employee All User Appraisal		●	○
Show biographies and activities of other users in the same learning group		○	●
Allow assessment deployment		○	●
Allow Unrestricted Delegation		○	●
Allow 9 Boxes Report Deployment		○	●
Privilege Level		10	

You can specify access rights to:

Allow Look & Feel Change	If you specify NO, the Skin Selection option in the Personalize screen will not appear.
Allow Admin Online Help	If this is set to NO, the role cannot access online Administrator Help. (Note this does not apply to hosted NetDimensions Performance sites)
Allow Org Maintenance	This allows a user to create or modify organizations (Levels) using the User Editor.
Allow Global Approval	This allows the role to see and approve or deny any and all enrollment requests that require some sort of approval action. This can be very useful for training center administrators who need to monitor all activity in this area. By default, a user/manager is only allowed to act on approvals routed to them directly.
Allow Course Deletes	This allows the role to delete courses. This option should be set with care because a course delete removes all course-related information from the system.
Allow User Deletes	This allows the role to delete users.
Allow User Creation	This allows the role to create users.
Allow Attachment in New Mail Form	This allows the role to attach files when sending e-mails through the Discussion Forum. If this feature is enabled, the user will see a File Attachment option in the Discussion Forum Email Reply screen. If this feature is disabled, the user will not see a File Attachment option in the Discussion Forum Email Reply screen.
Allow Enrollment Override	This allows the role to override course enrollments.
Allow Question Creation	This allows the role to create questions.
Allow Question Review	This allows the role to review questions.
Allow Question Approval	This allows the role to approve questions.
Allow Question Open for Editing	This allows the role to access questions for editing purposes.
Allow Exam Creation	This allows the role to create exams.
Allow Exam Generation	This allows the role to generate exams.
Allow Exam Grading	This allows the role to grade exams.
Allow Exam Instance Manager	This item controls whether the Manage/Generate Instance function is available in the Exam Template Editor.

Display Exam Password	This allows the role to display exam passwords.
Is External Question Approver	This specifies whether the role is the external question approver
Allow Question Approval Override	This enables the role to override question approval.
Allow Personal Reminders	To disable the setting of date related reminder messages in the Personal Calendar, set this to NO. If you have a large user population, the amount of storage for multiple years' worth of message content stored in the NetDimensions Performance Personal Calendar can be significant.
Allow Forum Moderation	Intended for identifying those roles with forum moderator privileges, setting this to YES allows the user to delete other users responses.
Allow Global Upload Maintenance	If set to Restricted the role can edit the files that he/she has uploaded using the File Upload function. For some organizations, all uploaded files are treated as a shareable pool of resources (images, documents, etc.) available to all for attachment to courses, questions, etc.).
Allow Exam Remedial Training Comments	This allows the role to comment on exam remedial trainings.
Allow Bulk Session Status Update	Should be set to "Yes" to allow bulk session status update.
Show Tokens Tab	This allows the role to display the token tab.
Sort the enrolled learning modules list by module title	Sort the enrolled learning modules list by module title when set to "Yes."
Show only top-level learning objects in enrolled learning modules	Shows top-level learning objects in enrolled learning modules when set to "Yes."
Allow Token Manual Adjustment	Enables the user of the role to manually credit or debit a token account when set to "Yes."
Allow User Editor Group View	An administrator who has access to the group can view (and hence access in the User Editor) all members of the user group.
Is Organizational External Training Approver	This allows the role to approve organizational external trainings.
Allow User Appraisal Administration	This allows the role to access the user appraisal administration features.

Allow Review Appraisee All User Appraisal	This allows the role for the appraisee to review all user appraisals.
Show biographies and activities of other users in the same learning group	This role allows the user to display the biographies and activities of their users that belong to the same learning group.
Allow Token Package Purchase	Should be set to "Yes" in order to allow a role to buy tokens.
Allow Assessment Deployment	This allows the role to access the assessment deployment features.
Allow Full Organization View of Participants	This overrides the usual user visibility in the **Report Wizard** for the following re port types: • Courseware Information • Exam Results • Learning Program Detail • Withdrawn User Details
Allow Content Package, AICC Course Structure, Resource and Web Catalogue's import	This allows the role to import content package, AICC Course Structure, Resources and Web Catalogs
Privilege Level	Privilege Levels allow you to specify the relative hierarchy among different user roles with 0 being the lowest setting and 9 being the highest except for System Administrators who have a privilege level setting of 10 by default. These numbers are themselves arbitrary within NetDimensions Performance, and are only meaningful in relation to each other. These privilege levels work in conjunction with other access rights. A user can make role assignment changes to users (e.g. in the User Editor) with lower privilege levels but cannot make role changes to another user whose privilege level exceeds his own. This is intended to prevent local administrators who have access to the User Editor from bumping up their role assignment (or someone who reports to them) to gain new system privileges that they should not have. For instance, a user can create users whose privilege levels are lower than his/her own or change the role of another user (again, whose privilege level is below the first users) but the new privilege level must be lower than the first user's own privilege level. This option is useful for setting up hierarchies of roles where, say Privilege Level 1 is a typical user, Privilege Level 5 is a Local Administrator and 10 is the Global Administrator.