PeopleFluent

Recruit, Develop, Perform, Reward

NetDimensions LMS

14.1

Catalog Administration

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

www.peoplefluent.com/products/learning

Document Information

Document ID: EN14110
Document Title: NetDimensions LMS 14.1 - Catalog Administration
Document Version: 1.0
Document Date: January 2019

This document may be revised from time to time.

Copyright Information

Table of Contents

Overview of Catalog Administration

Legend:

Please use the guide below to determine which features are applicable for the Talent Suite license you are currently using:

NetDimensions Performance = For Performance license only

NetDimensions Learning = For Learning license only

NetDimensions eLearning = For eLearning license only

NetDimensions Exams = For Exams license only

NetDimensions Talent Suite = Applies to all licenses

As a means of organizing learning objects catalogs provide excellent vehicles for managing content permissions as every catalog has access lists for users, organization units, user attributes and roles. While access to content can be managed in the user editor, we strongly suggest managing users' access to content through catalog access permission to catalogs rather than in the user environment in the user editor as this quickly can become very cumbersome.

Catalog and courseware management involves:

- Creation, set up and management of catalogs
- Definition and maintenance of:
    - Catalog structure
    - Languages
    - Subjects
    - Geographic Regions
    - Financial categories (i.e. Cost Accounting)
    - Creation of catalog entries and courseware templates
    - Management of catalog entries including the updating of entries, display options (that is whether to display or not) and the inclusion of reference and other materials (e.g. exams)

Before you install and configure courseware, you should configure your catalogs and also configure Debug and Tracing options (for SCORM courseware). This document focuses on the:

- Creation, set up and management of catalogs
- Definition and maintenance of:
- Languages
- Subjects
- Geographic Regions
- Financial categories (i.e. Cost Accounting)
- Facilities

Things to Watch Out for in Configuring Catalog Entries

The overall process of creating and configuring learning objects is generally similar among different types of learning objects though the procedures differ for different learning objects.
NetDimensions Talent Suite offers a considerable amount of flexibility in the configuration of catalog entries and in configuring catalog entries you may need to specifically configure:

- Continuing professional development points
- Discussion Forums and Chat Rooms
- Language display (for the catalog entry)
- Associated images
- Peer commentary
- Catalog Display
- Costing
- References
- Security options
- Prerequisites
- Emails
- Set up
- Enrollment policies, constraints, controls
- Sessions
- Exams
- Certification

Catalog Creation, Setup and Management

(applies to NetDimensions Talent Suite)

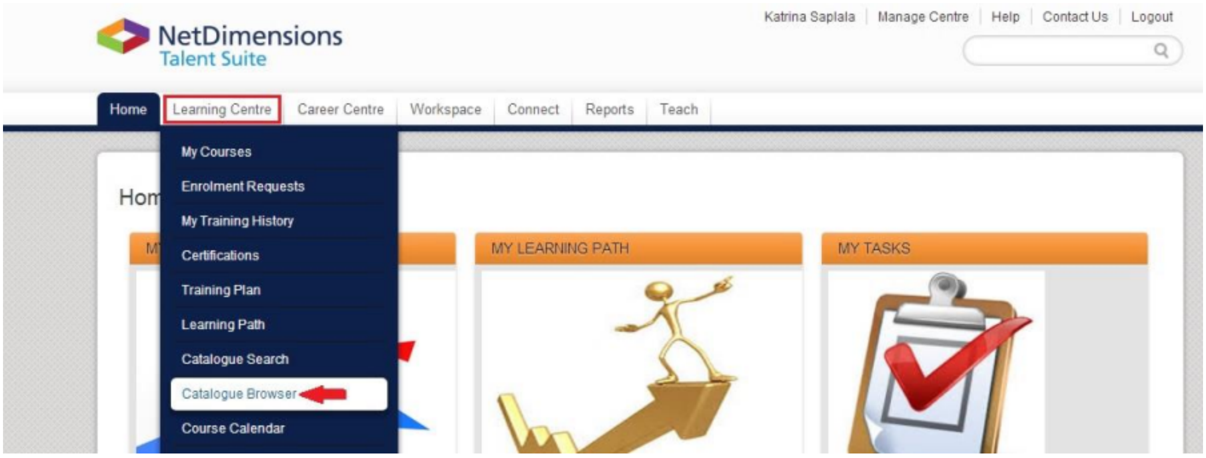
Hierarchical Catalogs

NetDimensions Talent Suite for Catalog Administration supports a multi-level catalog structure to categorize content more conveniently. In the catalog browser, the user can now choose between browsing through the categories or a tree view of the catalog using the Catalog Explorer.

If you are not using sub-catalogs or don't want the user experience of your Talent Suite Catalog Administration to change after the upgrade, you can enable the "classic" catalog view in the System Administration Manager.

Catalog Browsing

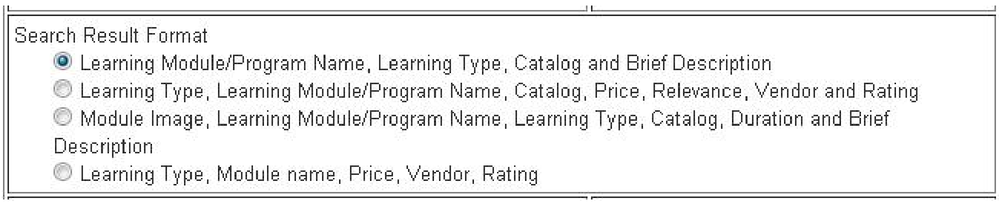
To navigate through the course catalog level by level, click on the catalog that you want to explore. As users get deeper into the hierarchy, sub-catalogs will be displayed on the top of each screen, the courses below them.



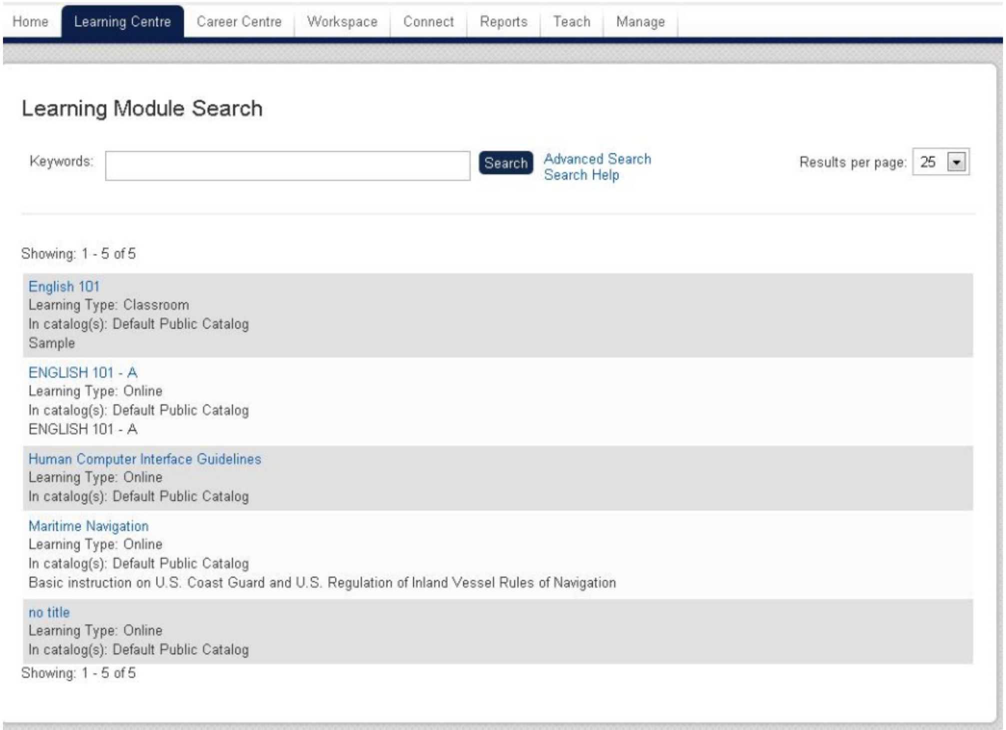
Catalog Search

Another way to navigating a catalog is to the use of the enhanced catalog search. With its new look, it will make the searching easier and adaptable for user. By default, the search page first screen only requires you to search by entering keywords.

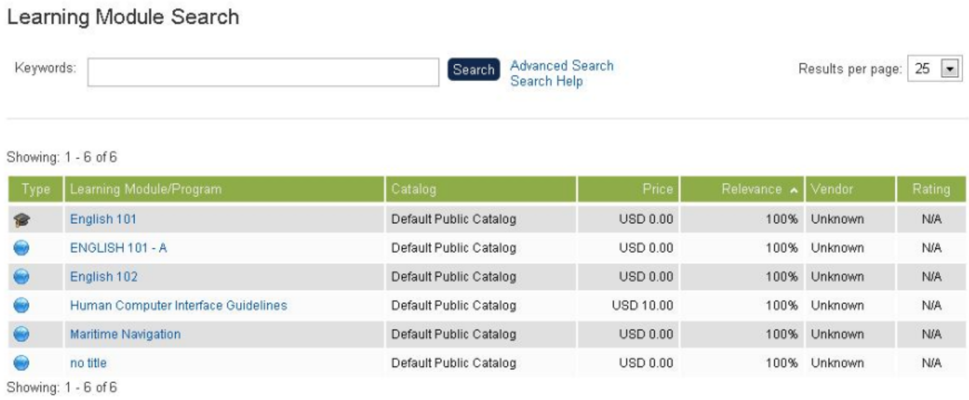
The Search Result Format can be configured in System Configuration:



Learning Module/Program Name, Learning Type, Catalog and Brief Description format



Learning Type, Learning Module/Program Name, Catalog, Price, Relevance, Vendor and Rating format

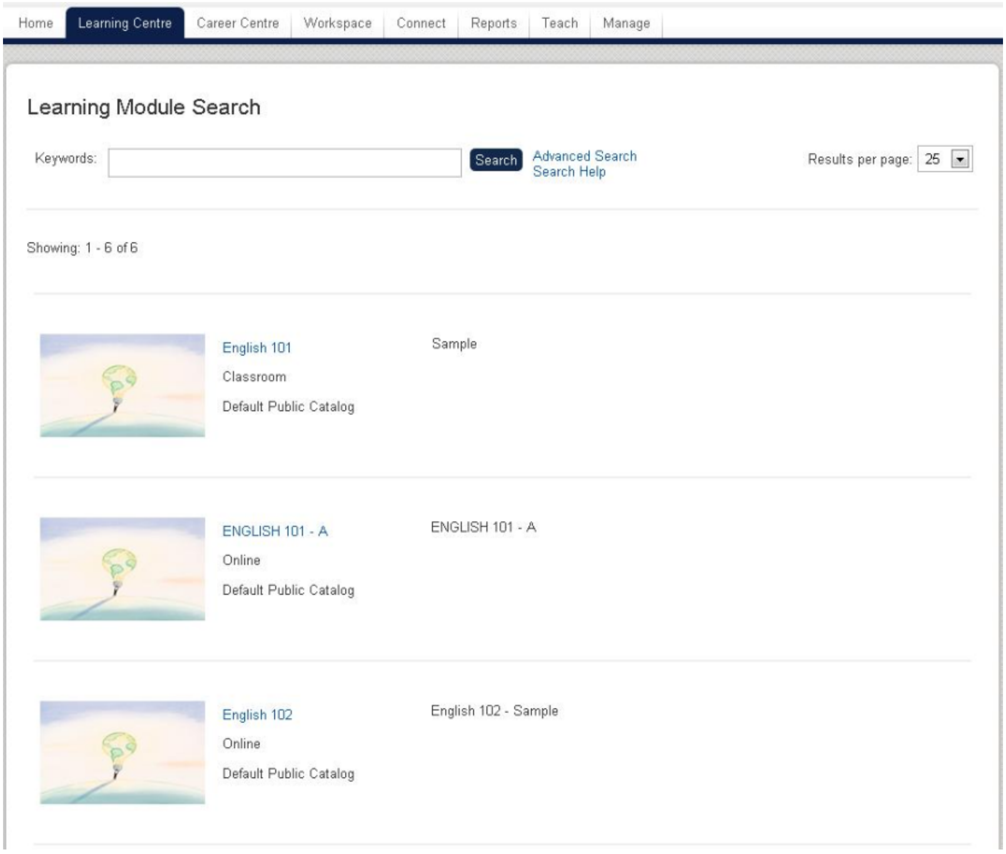


Type	Learning Module/Program	Catalog	Price	Relevance	Vendor	Rating
	English 101	Default Public Catalog	USD 0.00	100%	Unknown	N/A
	ENGLISH 101 - A	Default Public Catalog	USD 0.00	100%	Unknown	N/A
	English 102	Default Public Catalog	USD 0.00	100%	Unknown	N/A
	Human Computer Interface Guidelines	Default Public Catalog	USD 10.00	100%	Unknown	N/A
	Maritime Navigation	Default Public Catalog	USD 0.00	100%	Unknown	N/A
	no title	Default Public Catalog	USD 0.00	100%	Unknown	N/A

Showing: 1 - 6 of 6

With this search result format, you can sort the list according to column.

Module Image, Learning Module/Program Name, Learning Type, Catalog, Duration and Brief Description format



Learning Type, Module name, Price, Vendor, Rating format


Learning Module Search

Keywords: Search Advanced Search Search Help Results per page: 25

Showing: 1 - 6 of 6

Type	Learning Module/Program	Price	Vendor	Rating
	English 101	USD 0.00	Unknown	N/A
	ENGLISH 101 - A	USD 0.00	Unknown	N/A
	English 102	USD 0.00	Unknown	N/A
	Human Computer Interface Guidelines	USD 10.00	Unknown	N/A
	Maritime Navigation	USD 0.00	Unknown	N/A
	no title	USD 0.00	Unknown	N/A

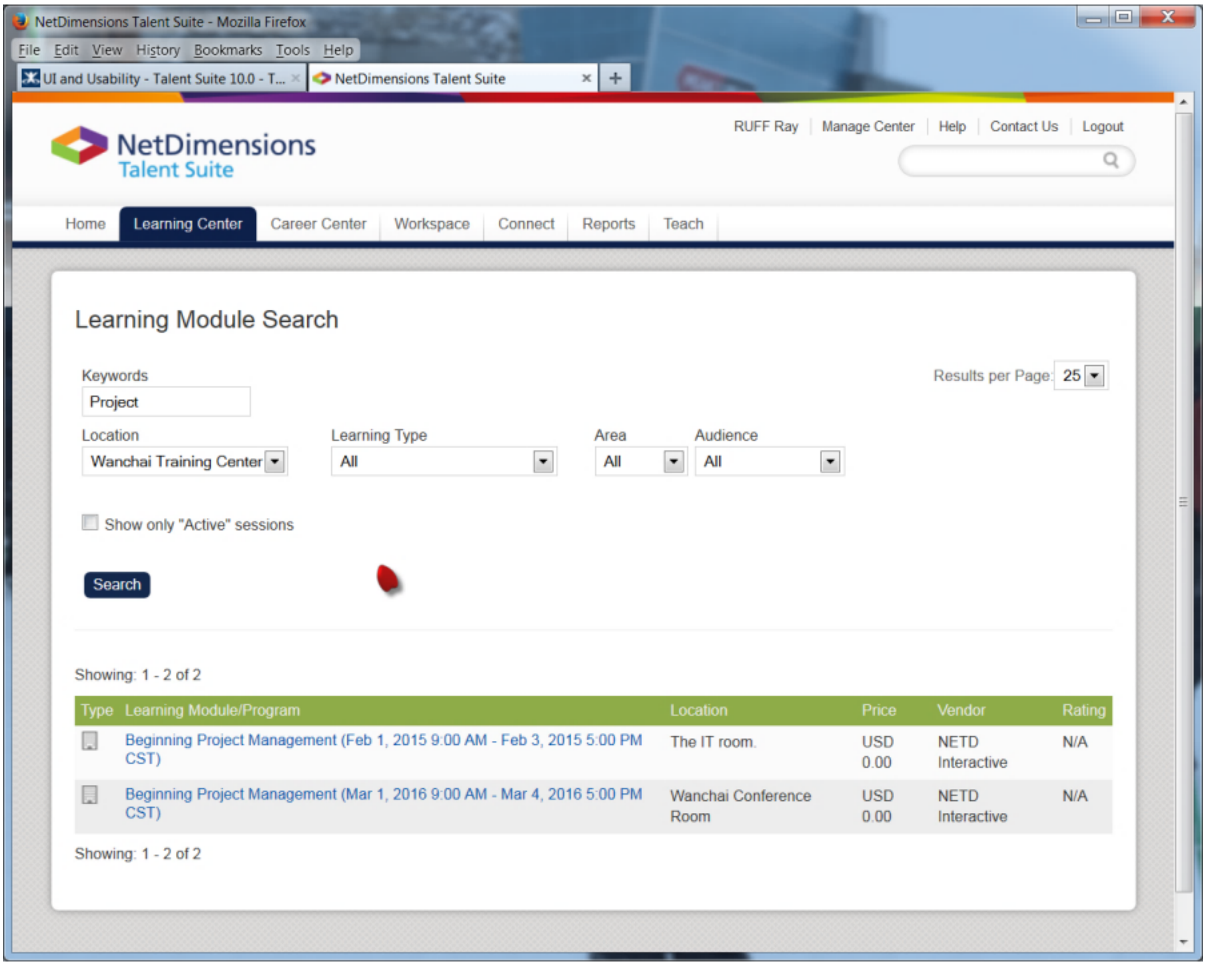
Showing: 1 - 6 of 6

Session-level Catalog Display

By default, the catalog search produces a learning object oriented result list. For organizations that are heavily classroom-session oriented (such as training sales companies), an alternate search screen and result list is now available. This option is biased towards classrooms and allows search based on location and lists the individual sessions that meet the search criteria. The resulting course information page also only lists just the single session that the user may click on from the search result list. The keyword search is still learning-object oriented, hence the indexed portion of searching applies to module level properties only, with the drop-down filters then used to determine which sessions to show.

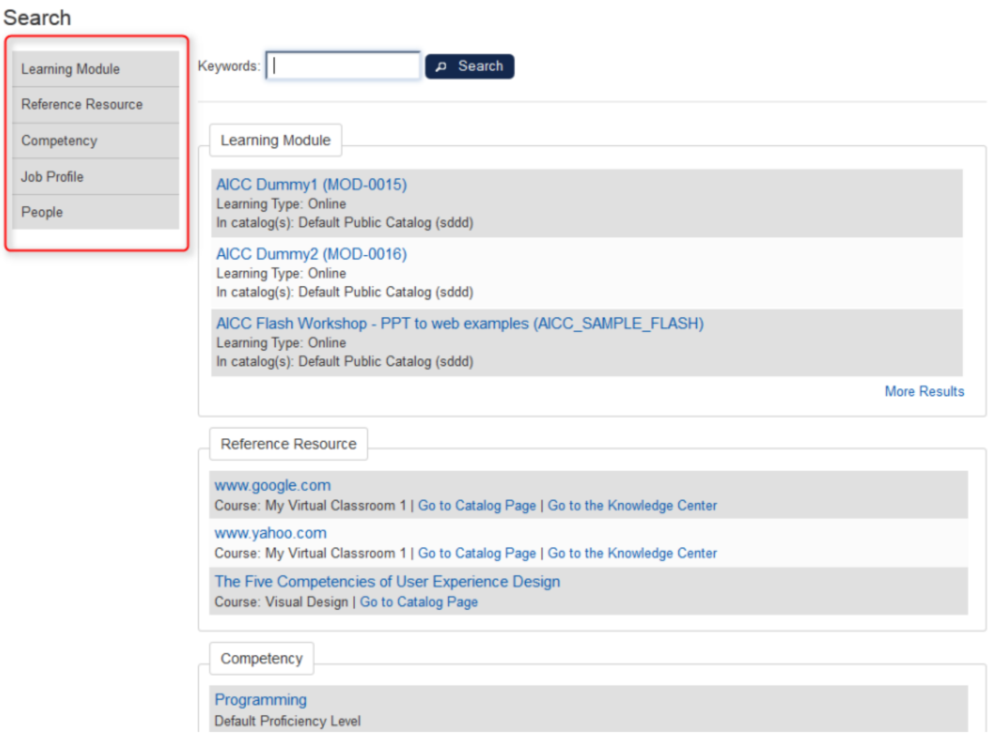
This alternate screen view is enabled via the "**System Configuration >> Catalog >> Enable**

Session-level Catalog Search Results".



Search Navigation

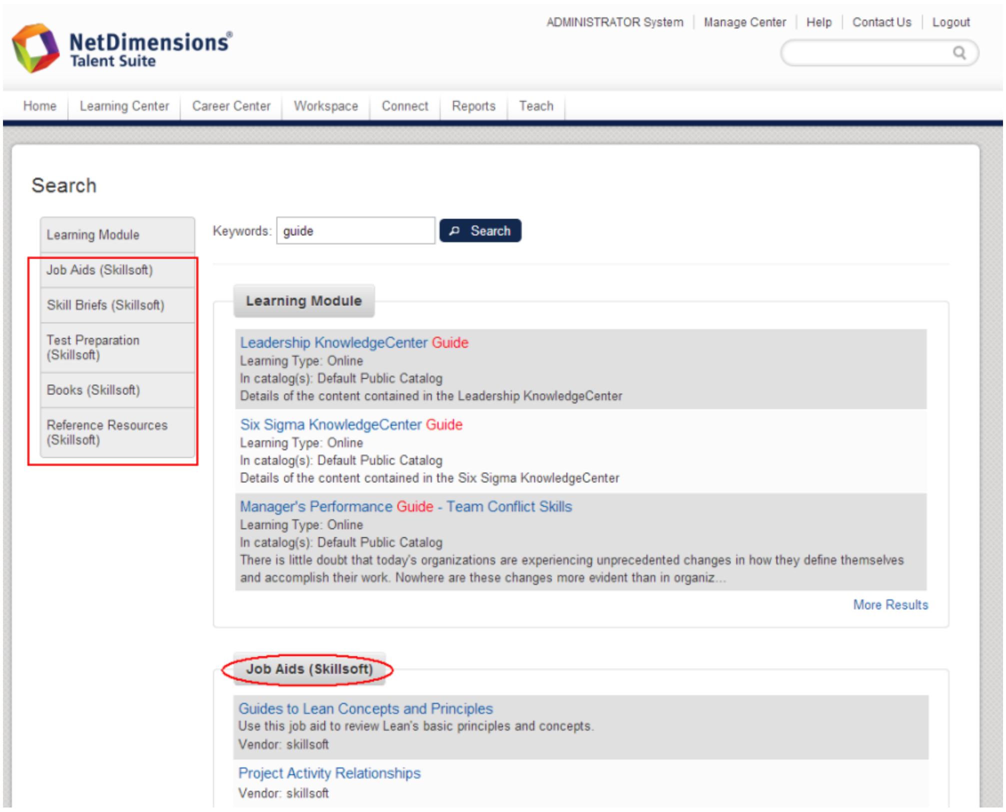
Single Search has been enhanced to show category tabs on the left that enable a user to navigate categories while scrolling the result.



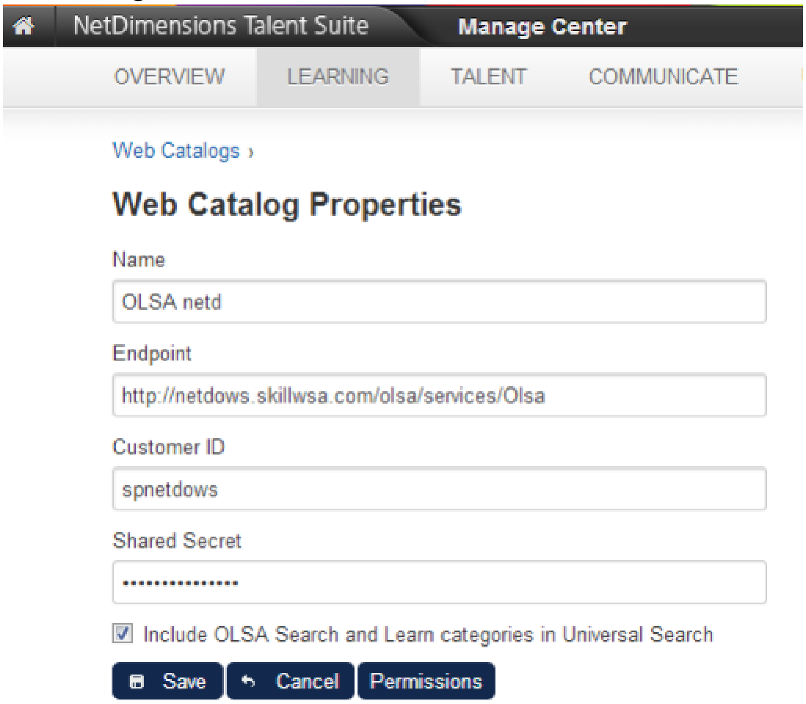
Search Skillsoft Resources

Universal search also includes results from skillsoft using LSA 'Search and Learn' integration - Main Search results page.

The NetDimensions Universal Search is extended with OLSA's 'Assets Integration Service', to display results with new search categories of Job Aids, Skill Briefs, Mentoring, Test Preparation, Books and Reference Resources from Skillsoft.

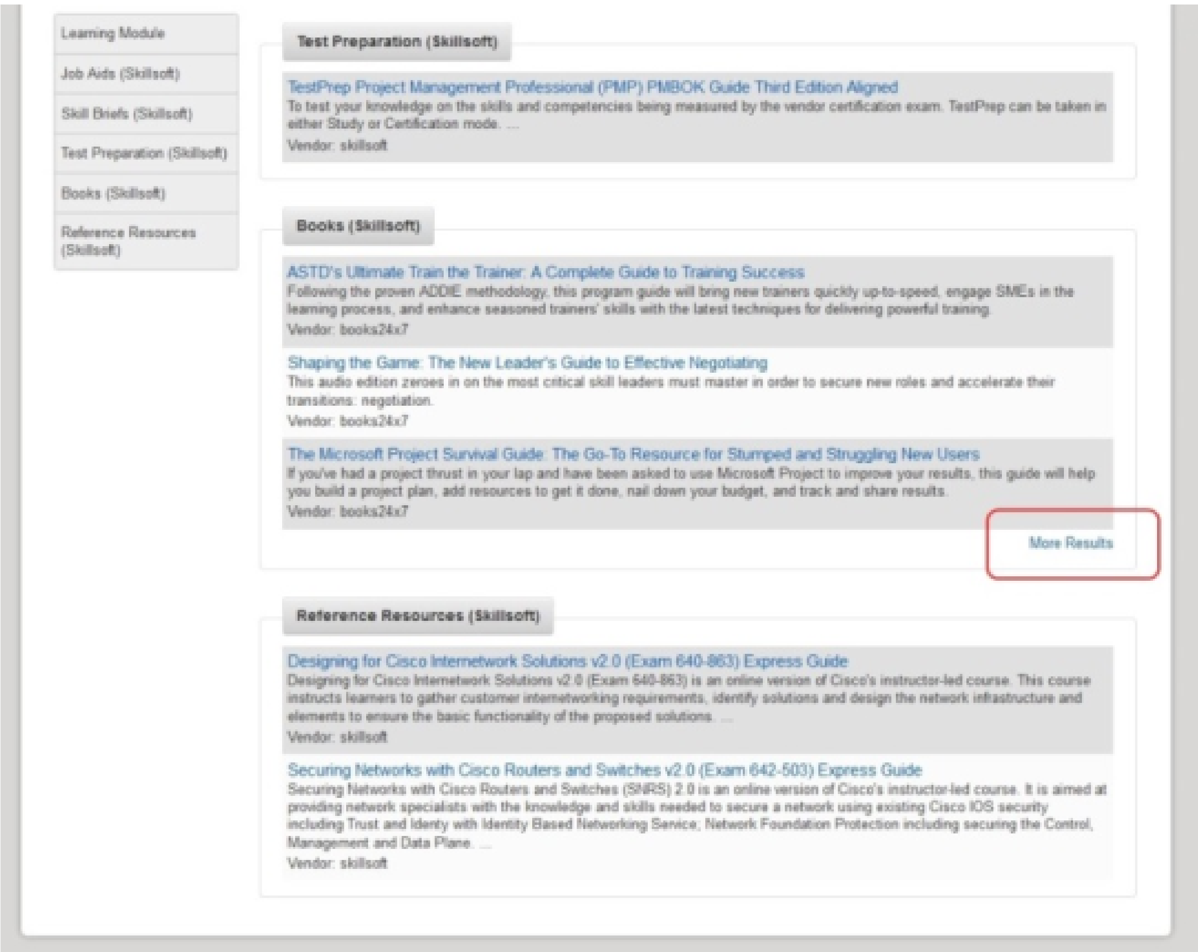


In order to integrate the search results from Skillsoft, an administrator has to setup a web catalog account in **Manage Center > Learning >Web Catalogs** and enable **"Include OLSA Search and Learn categories in Universal Search"**.

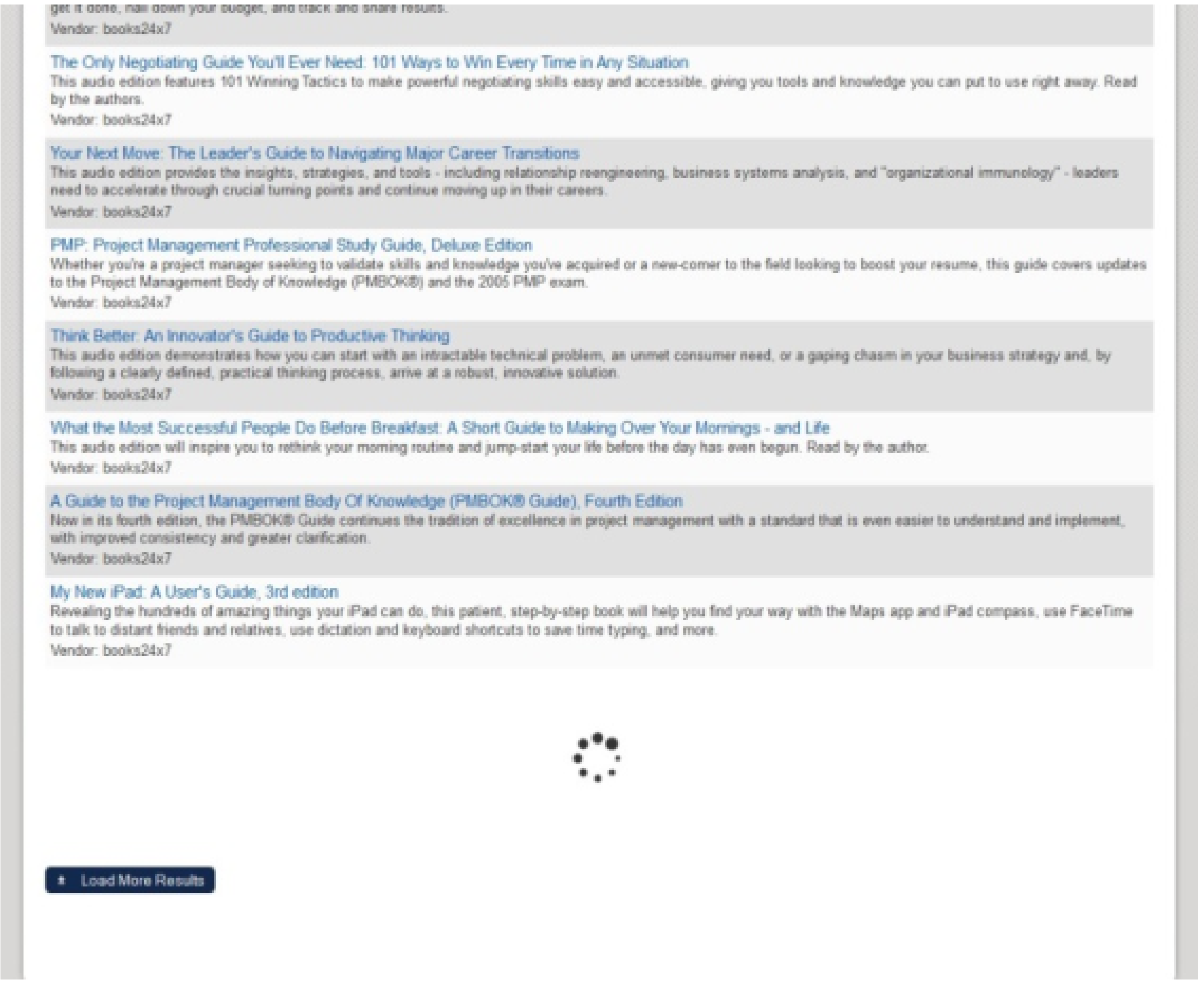


The language code used to perform the search is set according to user's language setting in user preference. If the language code in user preferences is not available from the OLSA service, the default language "English" will be used.

In addition to the learning types in Talent Suite, Universal Search will also return external types from Skillsoft if so configured. If there are more results than what is configured for the integrated search results page, a "more results" link will be displayed below the initially listed results for a particular item type on the results page. The user can click the link to get more results of the same type with the same keyword from Skillsoft.



The "More Results" link will bring the user to the selected type search result page, where the first 10 results are displayed. If there are more than 10 results, a "Load More Results" link will be displayed. Clicking the button will search for the next 10 results from Skillsoft

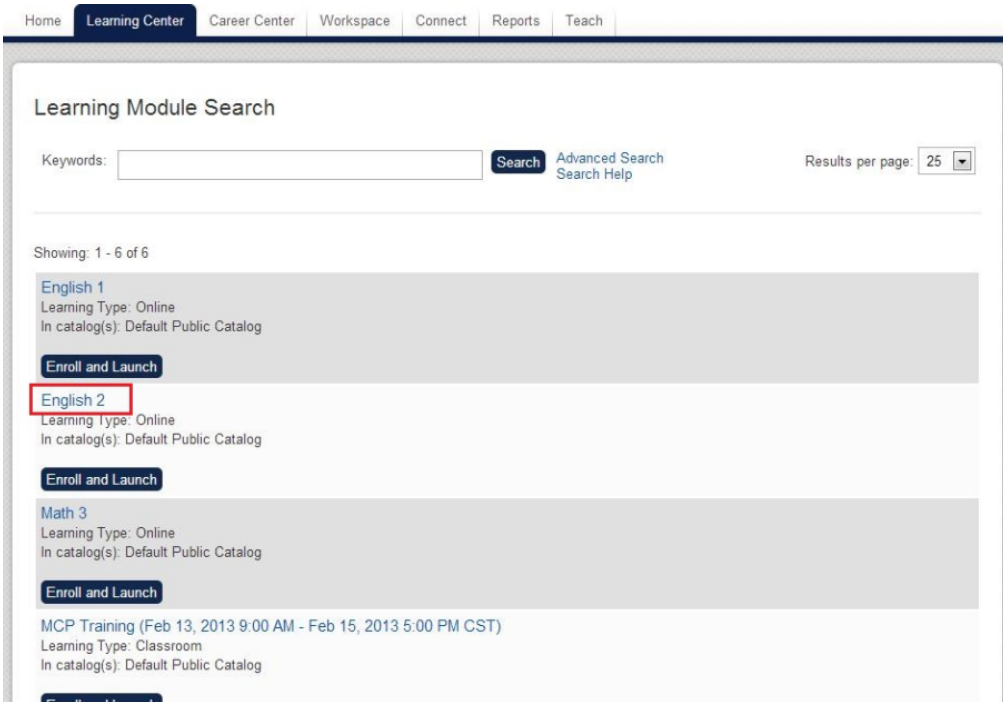


If there are less than 10 results from a search request, the "Load More Results" button will not be displayed.

Directly Enroll from Search Result

In this release, users can now directly enroll to a learning module from the catalog search result by showing the **Enroll and Launch** button in the search results.

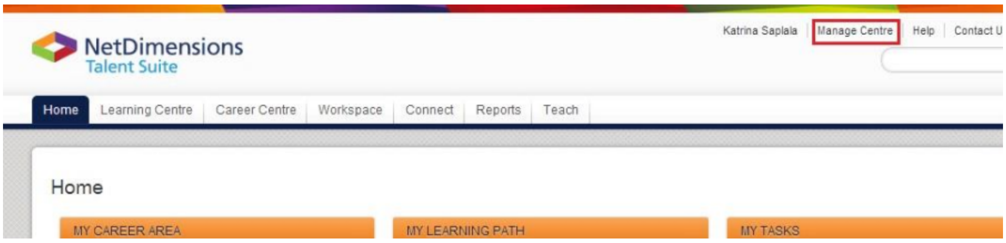
Note: You must configure the system to "Directly enroll and launch modules from catalog search result".



Configuring the Classic View

To enable the classic view:

1. Click **Manage Center** > **System** > **General Settings** > **System Configuration**.
2. Select **Catalog** from the menu or scroll down to the Catalog section.
3. Check **Use Classic Browse View**.
4. Click **Save**.



'Hidden' Catalogs

A hidden catalog, i.e. a catalog that is only accessible by those with permission to use the catalog, can be used as an intermediate staging area for the creation of new entries or the amendment of existing catalog entries before they are released for general viewing. The advantage of using a hidden catalog is that it allows you to enter, for example, new catalog entries that are in the process of creation or change. As incomplete or incorrect catalog entries in the hidden catalog are not be viewable by learners, the risk of learner confusion (as a result of seeing an incorrect or incomplete entry) is eliminated.
When the entry (e.g. the course) is ready to be displayed to learners, it only needs to be reassigned to one of the regular catalogs to which learners have viewing permissions. A catalog can be 'hidden' through the use of access rights – that is by restricting access to the catalog to a select few, the catalog is effectively 'hidden' from general viewing. We highly recommend use of hidden catalogs.

Catalog Entry Display

Note that in order for a learning object to appear in a catalog, you must explicitly specify that it will appear in the catalog by:

- Checking the Show in Catalog in the Configure Catalog section.
- (Optionally) specifying the catalog(s) in which the entry will appear by clicking the Assign Catalog hyperlink, then choosing the desired catalog from the Select Catalog to Assign screen that opens in a new window.

Catalog Creation and Maintenance

First of all, the sub-catalogs are themselves actual catalogs that can contain content and have other member sub-catalogs. You can arrange the hierarchy to facilitate content organization, or alternatively to subdivide, the view of information to authorized groups, or some combination of both. Each catalog has a "display format" setting that controls how the catalog is presented to the user. You can mix and match the display settings for different catalogs/sub-catalogs within the same hierarchy.

The "top" catalog is where it all begins, but for user navigation, selecting a catalog at a higher level than others will NOT show all courses in the underlying sub-catalogs. Only the immediate sub-catalogs and direct courses are typically shown to the users. As a "best practice" for visually stimulating navigation, it is recommended that FORMAT3 be used at the TOP level (large pictures are shown for the catalogs) and FORMAT1 or FORMAT2 (pictures are shown for the courses) for the individual catalogs. A key objective for administrators is to require as few settings as possible. To support this, an "Inherit Permissions" indicator is provided to allow sub-catalogs to be visible to the same users as their parent catalog. In addition, each catalog may have explicitly set permissions (configured using the PERMISSIONS button). The inherited permissions and the explicit permissions added together determine who can see a specific sub-catalog. Even if inherited permissions are not used, anyone who can see a specific sub-catalog is also granted READ rights to the direct parent hierarchy. Otherwise, a user could not navigate down to the sub-catalog they have explicit permission to use.

As a general "best practice", you should ALWAYS set permissions on the first level catalogs. "Inherit Permissions" may then be used on lower levels without any other administration required. Of course, if you want to limit access to specific sub-catalogs, you can set explicit permissions as needed. Inherited permissions are virtual and are not written to the database. Thus, changing the parent settings automatically affects all of the children.

The permissions criteria for individual catalogs are normally interpreted using OR logic, although you may change this to AND in the system configuration section.

EXAMPLE 1: Content organized for general browsing (using a structure meaningful to the users). Here, use the "Inherit Permissions" flag for all sub-catalogs under a given master catalog (which itself can be at a lower level).

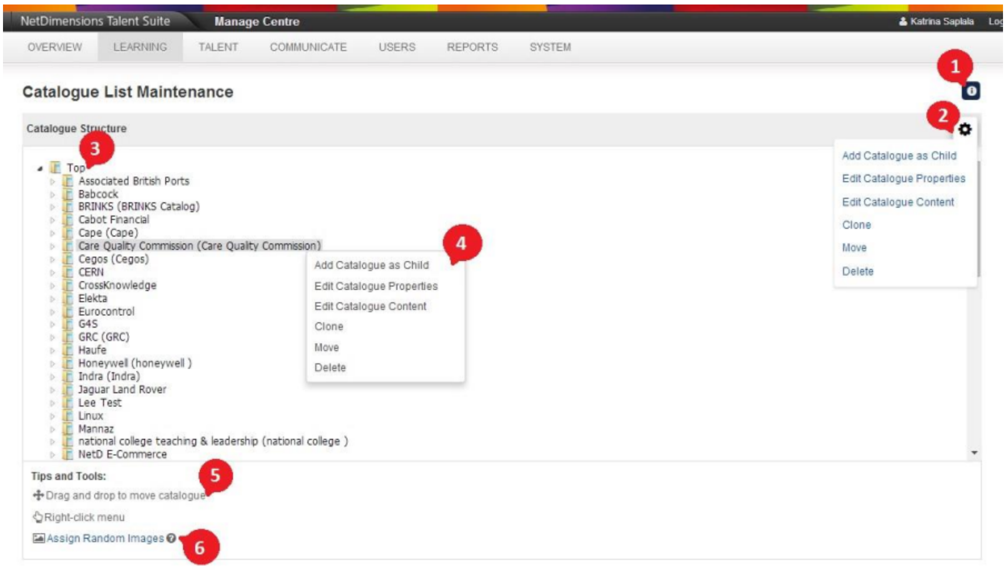
EXAMPLE 2: Content organized by "Restricted Groups". If the objective is to have some of the sub-catalogs visible to only a select group, then turn off the inherit permissions for those specific catalogs and explicitly set the desired permissions.

Controlling Access for Users Who Have Not Logged In

In some cases, you might want to allow users access to catalogs without requiring them to log in. To support this, an "Allow users to access the catalog without logging in" indicator is provided to allow catalogs to be viewable by them. This setting is independent from the permission setting mentioned above.

Just like the permission setting, if a user has permissions to view a sub-catalog, in order for a user to navigate down to the specific sub-catalog, its direct parent hierarchy will be viewable as well.
To access the *Catalog List Maintenance*, click **Manage Center** > **Learning** > **Catalog General Settings** > **Catalog List Maintenance.**

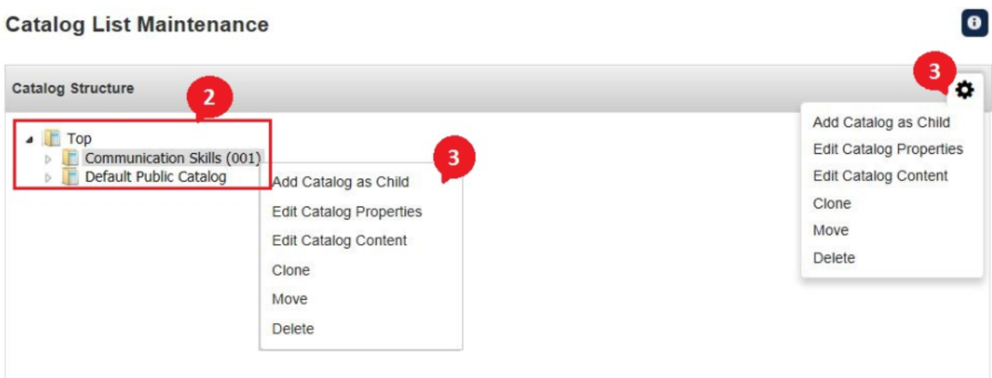
Catalog List Structure



1	Information icon	Displays the guidelines for using structured catalogs.
2	Action Menu	The action menu displays a list of drop-down actions that can be performed based on the Role Access Control and Permission on the selected catalog. For example, if a user selects the *Top* catalog, only the first two actions can be performed, the rest are disabled.
3	Catalog Structure Tree	The catalog hierarchy is displayed in a easily navigable tree structure.
4	Context Menu (Right - Click)	A context menu can be accessed by right clicking on the catalog tree structure. It provides easy access to Action Menu for a selected catalog.
5	Drag-and-drop action	A quick way to move a catalog.
6	Assign Random Images	Clicking on this link will randomly assign pictures to all catalogs and courses which do not have a picture associated with the

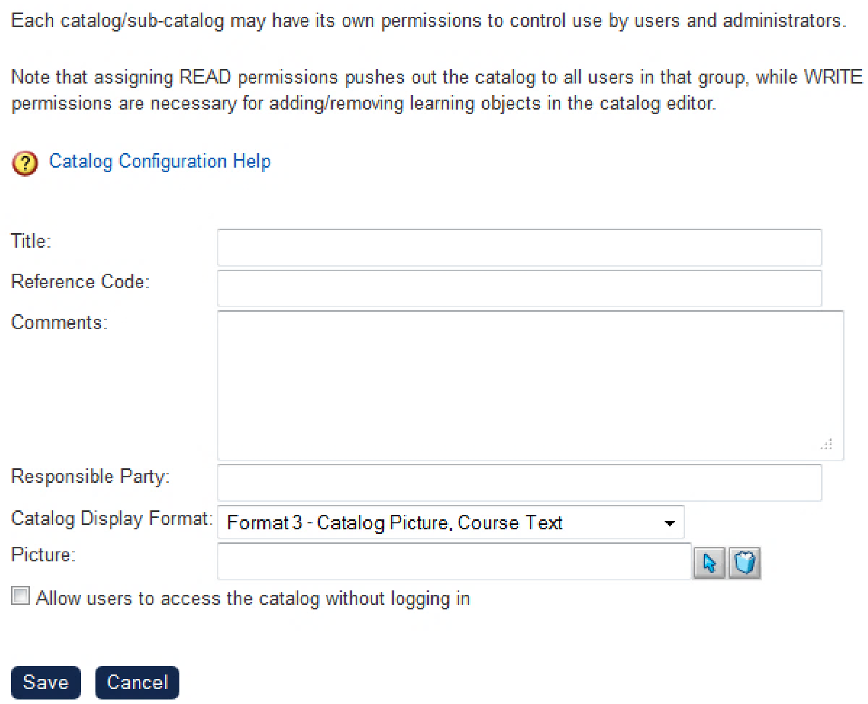
Adding New Catalogs

1.Access the *Catalog List Maintenance*; click **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.



2.In the *Catalog List Maintenance* screen, select the catalog where the new child catalog will be added.

3.You either click the **Action Menu** or the **Context Menu** then select **Add Catalog as Child**. The Maintain Catalog Properties screen appears.



4.Enter the required parameters listed:

- Enter a title for the new catalog.
- Enter the reference code.

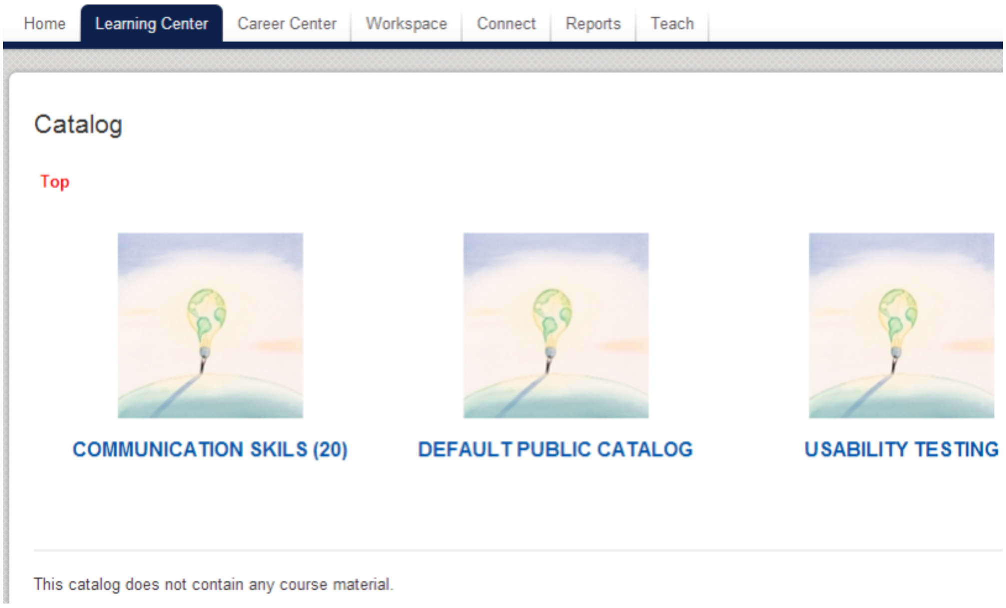
Reference code on catalogs are use when catalogs are in multiple languages, an admin may be unable to identify the correct course to be assigned. With a reference code assigned to a catalog, the admin will be able to assign modules to all catalogs that have the same reference code without having to understand the title in different languages.
The reference code is not a mandatory field. If no reference code is entered, no information will be displayed. When reference code is assigned it will appear on the following pages:

- Catalog Browser
- Search Screens
- Catalog Selector

5.Click **Save**. You are taken back to the *Catalog List Maintenance* screen

6.If desired, add a comment about the new catalog.

7.If desired, enter the party that is responsible for the contents of this catalog.



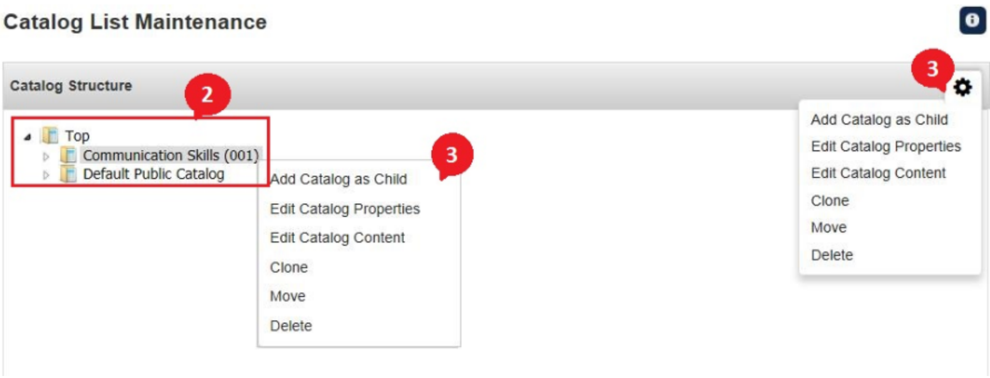
- NetDimensions Talent Suite offers six different layout combinations for the catalog contents:
  - **Format 1 - Catalog Picture, Course Picture:** Catalogs and learning modules are displayed using the assigned images
  - **Format 2 - Catalog Text, Course Picture:** Catalogs are presented as a list, learning modules are displayed using the assigned images
  - **Format 3 - Catalog Picture, Course Text:** Catalogs are displayed using the assigned images; learning modules are presented as a list.
  - **Format 4 - Catalog Text, Course Text:** Catalogs and learning modules are presented as lists.
  - **Format 5 (Dynamic) - Catalog Picture, Course Picture:** Catalogs and learning modules are presented using the assigned pictures.
  - **Format 6 – Catalog/Course Picture over Text:** Catalog/course picture are displayed over text.
- To assign an image to the catalog, either enter a URL manually or select an image from the repository by clicking the Select icon.
- Optionally, to have the Talent Suite randomly pick images from the repository and use these as catalog images. The recommended size for catalog images is 300 pixels by 300 pixels, other sizes will be scaled to this size.

Root Catalog Permissions

For users who have access to the *Catalog List Maintenance* screens, the ability to create Level 1 catalogs can be controlled. This is useful in cases where one Talent Suite application is being used by multiple sets of users.

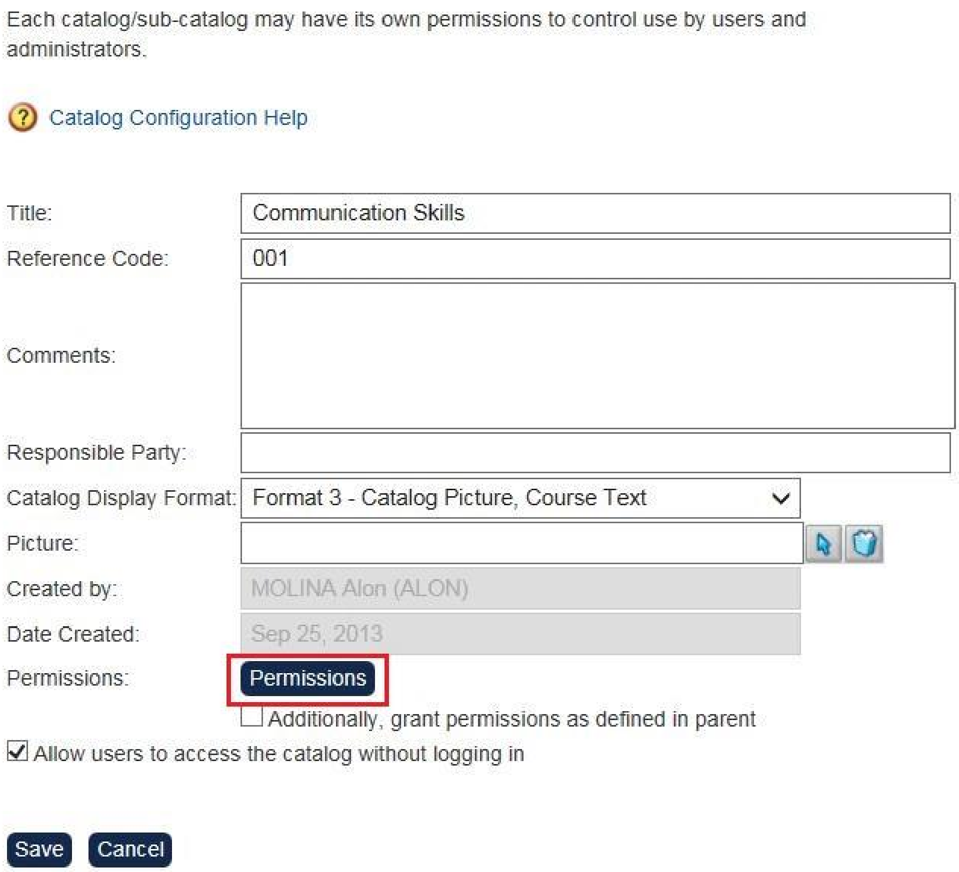
To assign user permission at the root catalog level:

1.Access the *Catalog List Maintenance*; click **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.

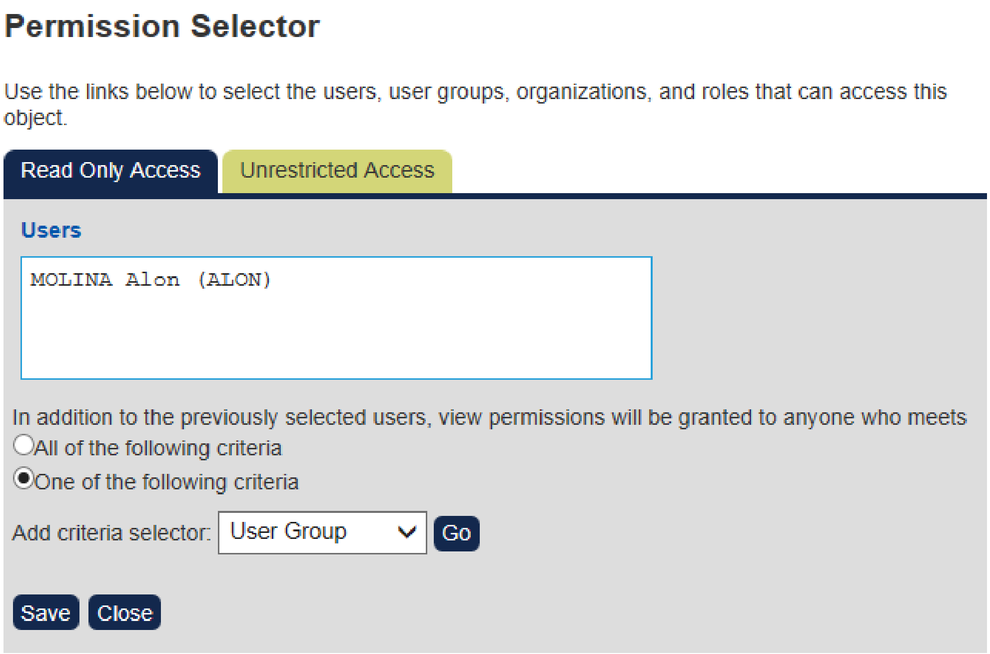


2.In the *Catalog List Maintenance* screen, select the catalog where the permission will be set.

3.You either click the **Action Menu** or the **Context Menu** then select **Edit Catalog Properties**. The Catalog Properties screen appears.



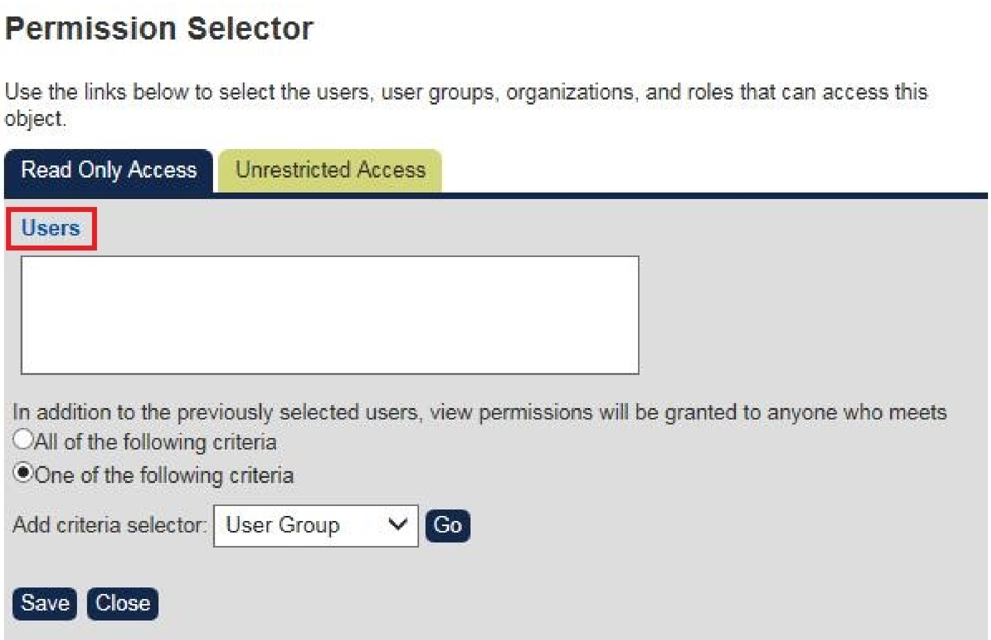
4.Click **Permission**.The *Permission Selector* screen appears. Configure the permission setting using the guideline below the image.



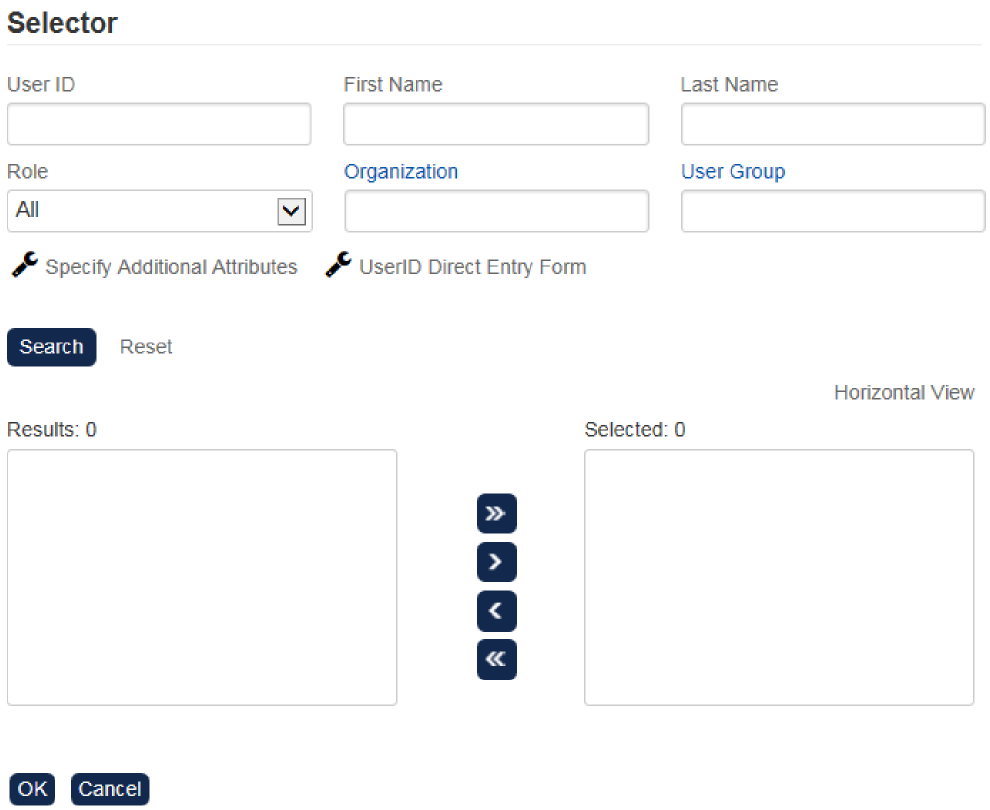
5.Prior to giving permission to a user or group of users, you need to select first the type of access you want to give to the user. There two types of access you can give to a user, namely:

- **Read Only Access**. Having READ permission means a user can see a Catalog but not perform any action
- **Unrestricted Write Access**. Having Unresctricted Write Access permission means user can alsoupdate/delete a Category

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

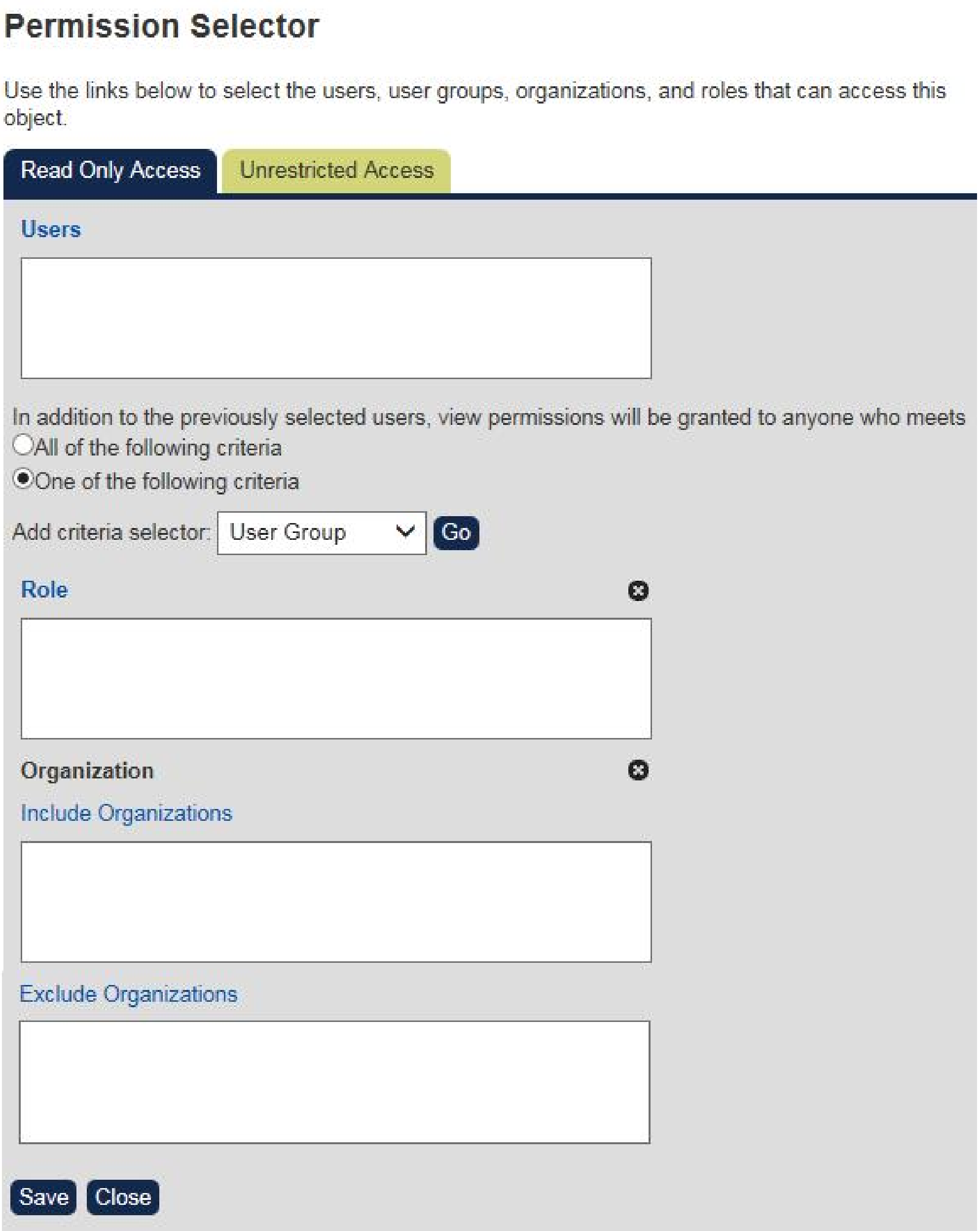


7.This opens the *User Selector* screen to select a specific user or group of users.



8.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 all users belongs to the criteria defined in the Add criteria selector. For instance that user added the criteria Role and Organization as shown in the image below.
  - This means that the user must belong to the roles AND organization in order for the user to access the permission to view the report.



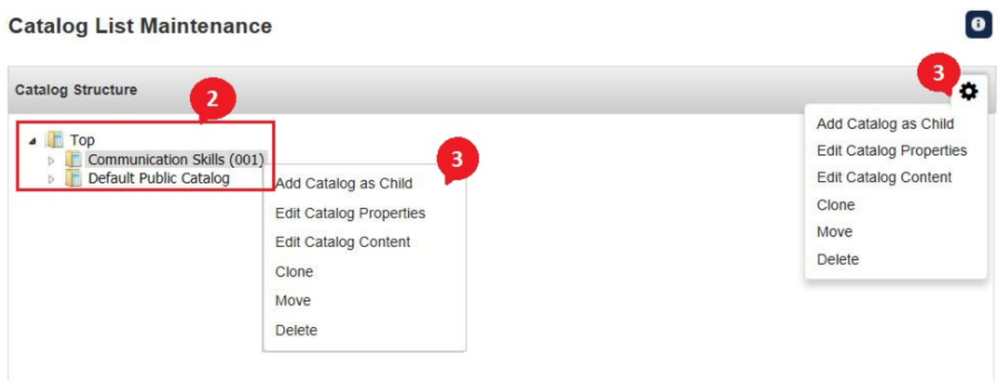
- ***One of the following criteria***
  - This means that viewing permission can be granted to all users belongs to any of the criteria defined in the Add criteria selector.
  - This means that the user must belong to the roles OR organization in order for the user to access the permission to view the report.
- ***Add criteria selector***
  - This allows you to add criteria. To add the criteria, click the selector dropdown button and then select the preferred criteria.

Note: For every selected criterion, a criterion box will be displayed. 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.

Update Catalog Properties

To edit a catalog listing:

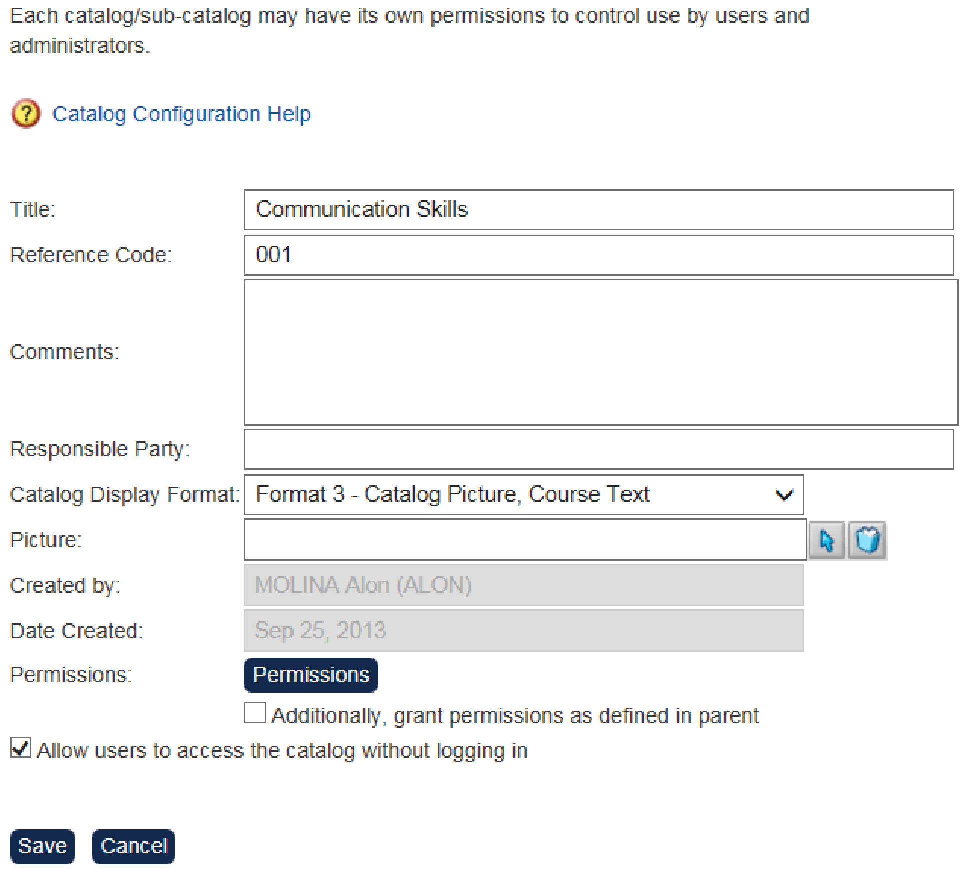
1.Access the *Catalog List Maintenance*; click **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.



2.In the *Catalog List Maintenance* screen, select the catalog you want to update.

3.You either click the **Action Menu** or the **Context Menu** then select **Edit Catalog Properties**.

4.The Catalog Properties screen appears. Edit the field(s) that you want to change.

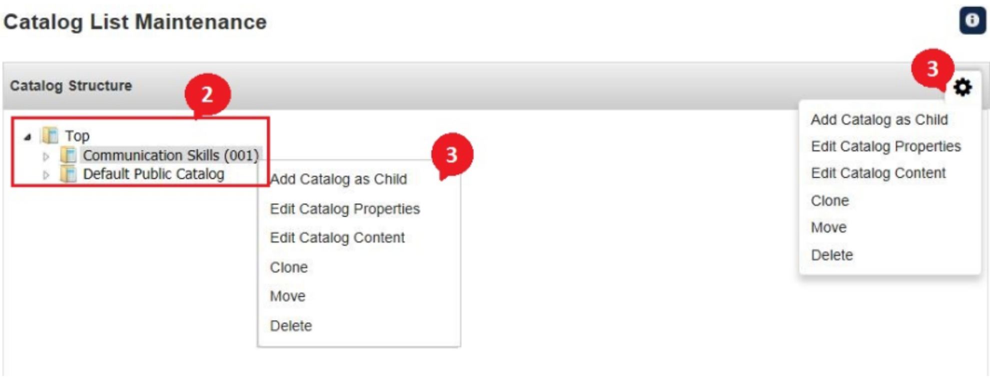


5.Click **Save** to Update.

Update Catalog Content

This action menu allows one to edit the content of the selected catalog

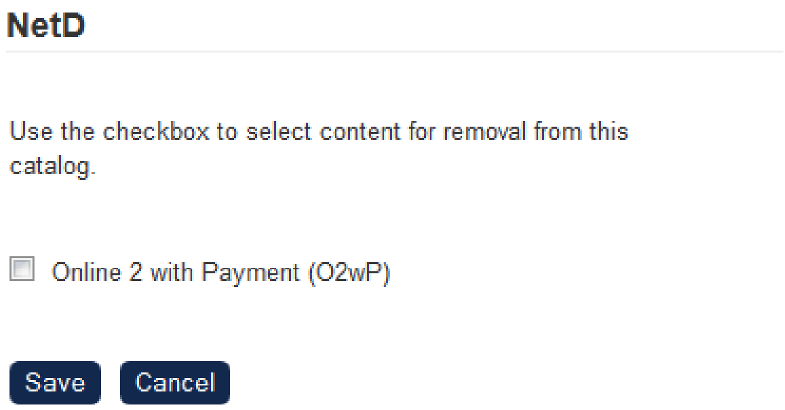
1.Access the *Catalog List Maintenance*; click **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.



2.In the *Catalog List Maintenance* screen, select the catalog you want to update.

3.You either click the **Action Menu** or the **Context Menu** then select **Edit Catalog Properties**.

4.The Catalog Content screen appears. Use the checkbox to select which content will be removed from the catalog.

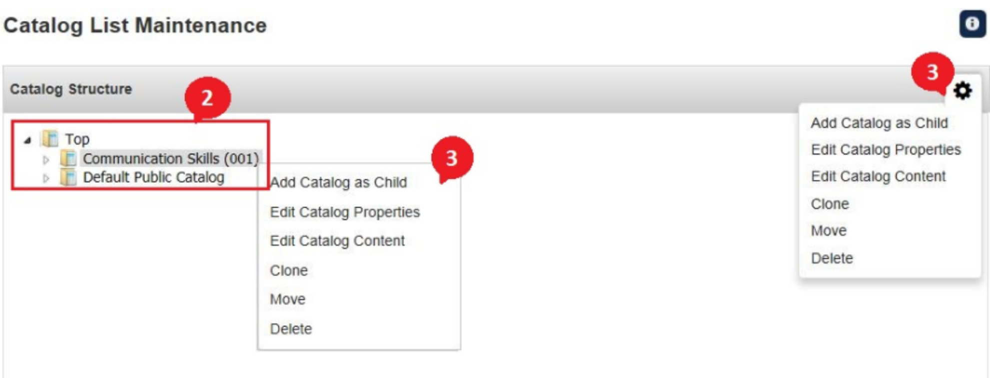


5.Click **Save** to Update.

Clone a Catalog

This action menu allows one to clone the selected catalog

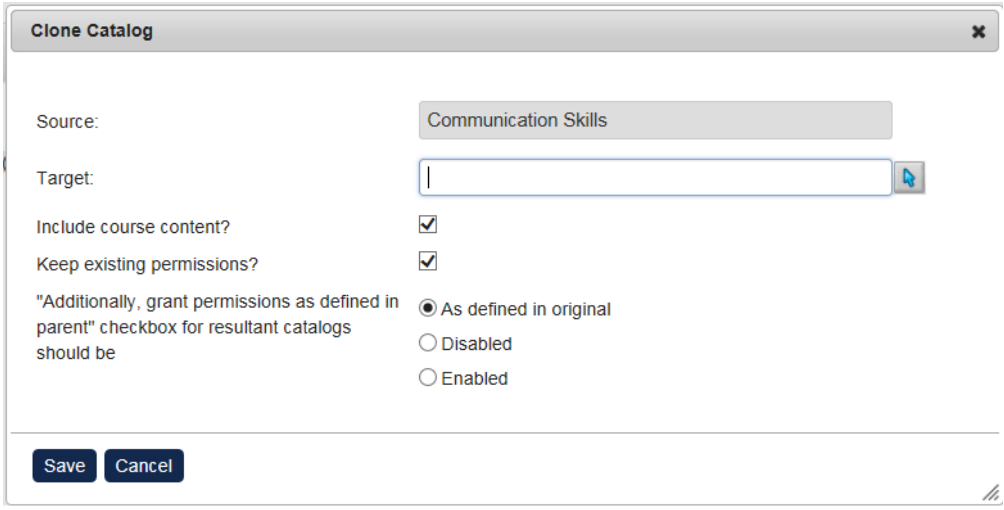
1.Access the *Catalog List Maintenance*; click **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.



2.In the *Catalog List Maintenance* screen, select the catalog you want to clone.

3.You either click the **Action Menu** or the **Context Menu** then select **Clone**.

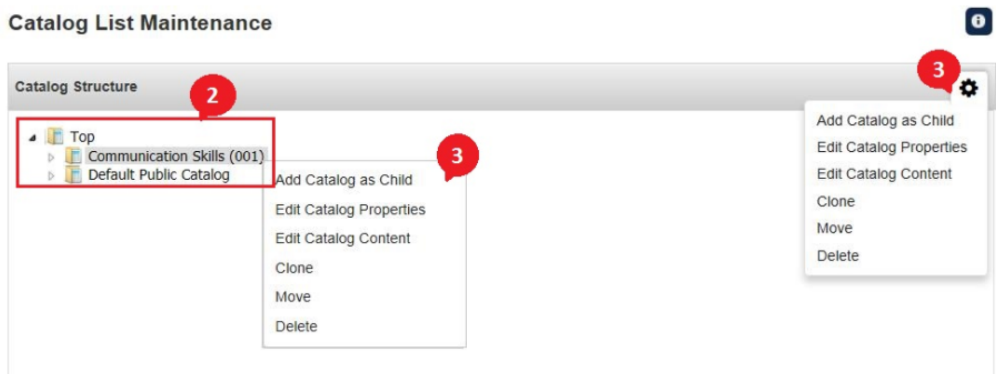
4.The Clone Catalog screen appears. Click the Target link to select the catalog to which you want to move or clone the source catalog to. You can also, include course content or keep the existing permission when move a catalog.



5.Click **Save** to Update.

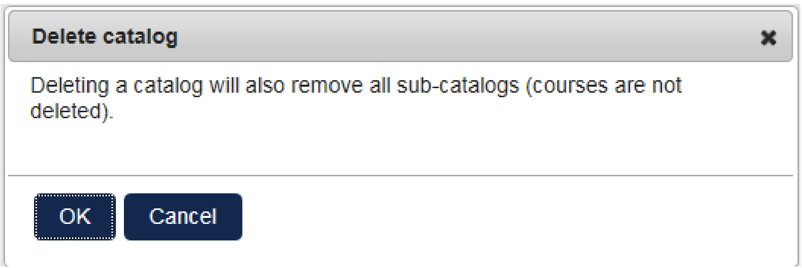
Delete a Catalog

1.Access the *Catalog List Maintenance*; click **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.



2.In the *Catalog List Maintenance* screen, select the catalog you want to remove.

3.You either click the **Action Menu** or the **Context Menu** then select **Delete**.

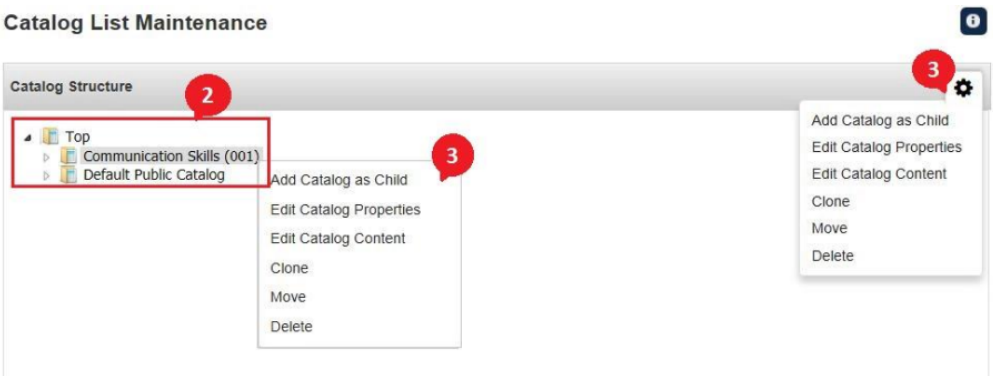


4.A confirmation box appears. Click **Ok** to proceed.

Move Catalogs

To rearrange catalogs and sub-catalogs, you can use the move function. This allows you to move a catalog with its content, i.e. courses and sub-catalogs, to another branch in the catalog tree while the clone function allows you to keep the current structure and add a catalog with its content to some other catalog, e.g. because you might want to add the catalog to a part of the catalog structure which is not accessible for a certain audience (e.g. another customer you are hosting on the same site. Action menu items allow you to move a catalog but this can also be achieved by dragging and dropping the catalog in the desired location.

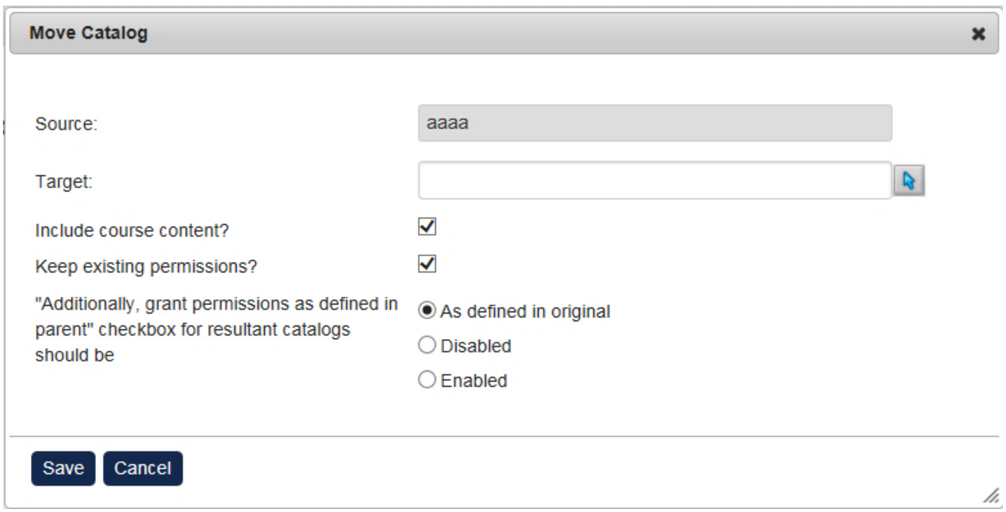
1.To move a catalog, access the *Catalog List Maintenance*; click **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.



2.In the *Catalog List Maintenance* screen, select the catalog you want to.

3.You click the **Action Menu** or the **Context Menu** then select **Move** or simply drag the catalog and drop it to the desired location.

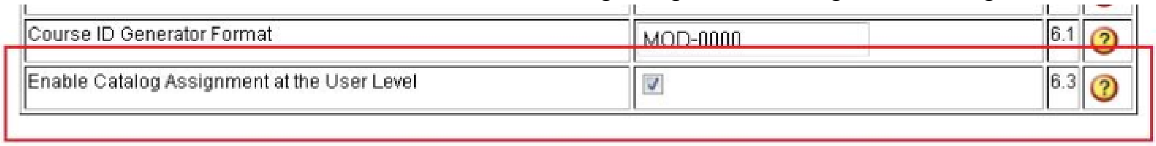
4.The **Move Catalog** screen appears. Click the **Target** link to select the catalog to which you want to move or clone the source catalog to. You can also, include course content or keep the existing permission when move a catalog.



5.Click **Save**.

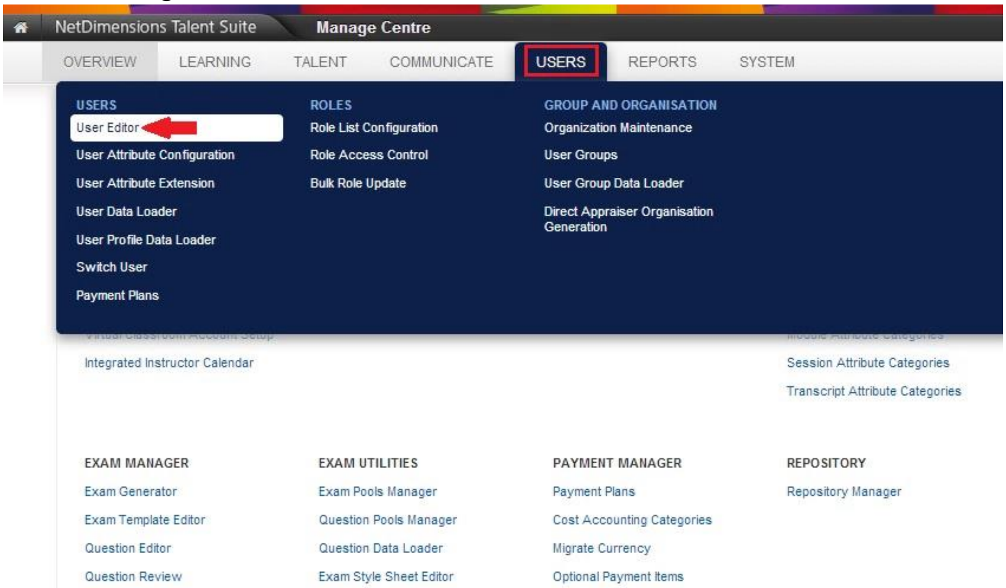
Disable the Catalog Assignment in User Editor

Under **Manage Center > System > General Settings > System Configuration**, a configuration setting called "*Enable Catalog Assignment at the User Level*" is found. If enabled, catalog access can be granted at the user level as well as through the standard catalog permissions. The use of this is not recommended as such a set-up becomes difficult to maintain in the long run. The preferred approach is to set the access permissions individually on each course catalog. If disabled, the Catalog Assignment section in the User Editor will be hidden and its existing assignment settings will no longer be effective.



On a fresh install of the Talent Suite, the option "Enable Catalog Assignment at the User Level" is disabled by default. When upgrading to the Talent Suite from an earlier version, if no existing catalog assignment data exists at the user level, then the configuration option will be automatically disabled, otherwise it will be enabled to allow continued use of the function.

Access **Manage Center** > **Users** > **Users** > **User Editor**.



The *User Editor* appears. Make your selection on the left navigation pane until you find the user. On the right navigation pane, click the *Environment* tab, there you will find a section that allows you to search specific course catalogs and assign it to the user.

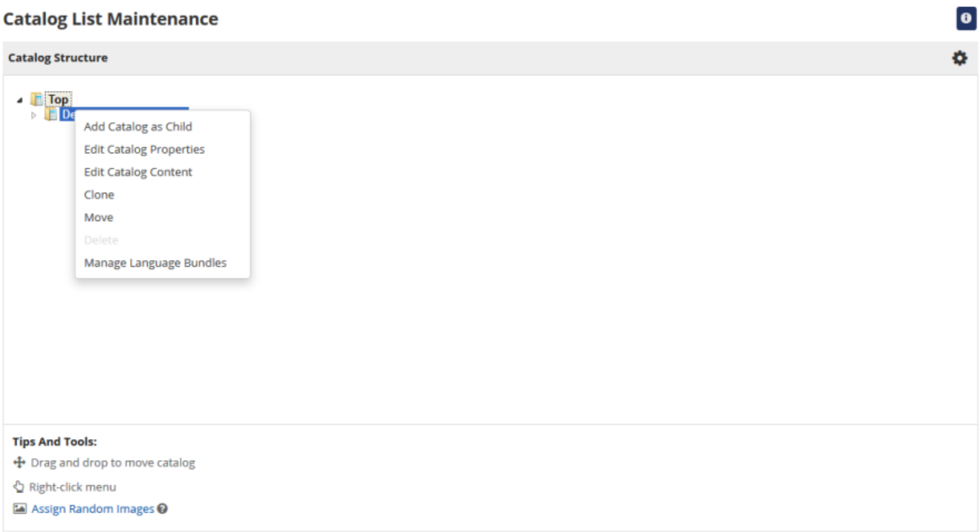
Catalog Bundles

A similar Multiple-Language handling has been extended to catalogs, without elaborating the language bundle framework model again, to highlight the basic adopted approach on catalogs, here are the key notes:

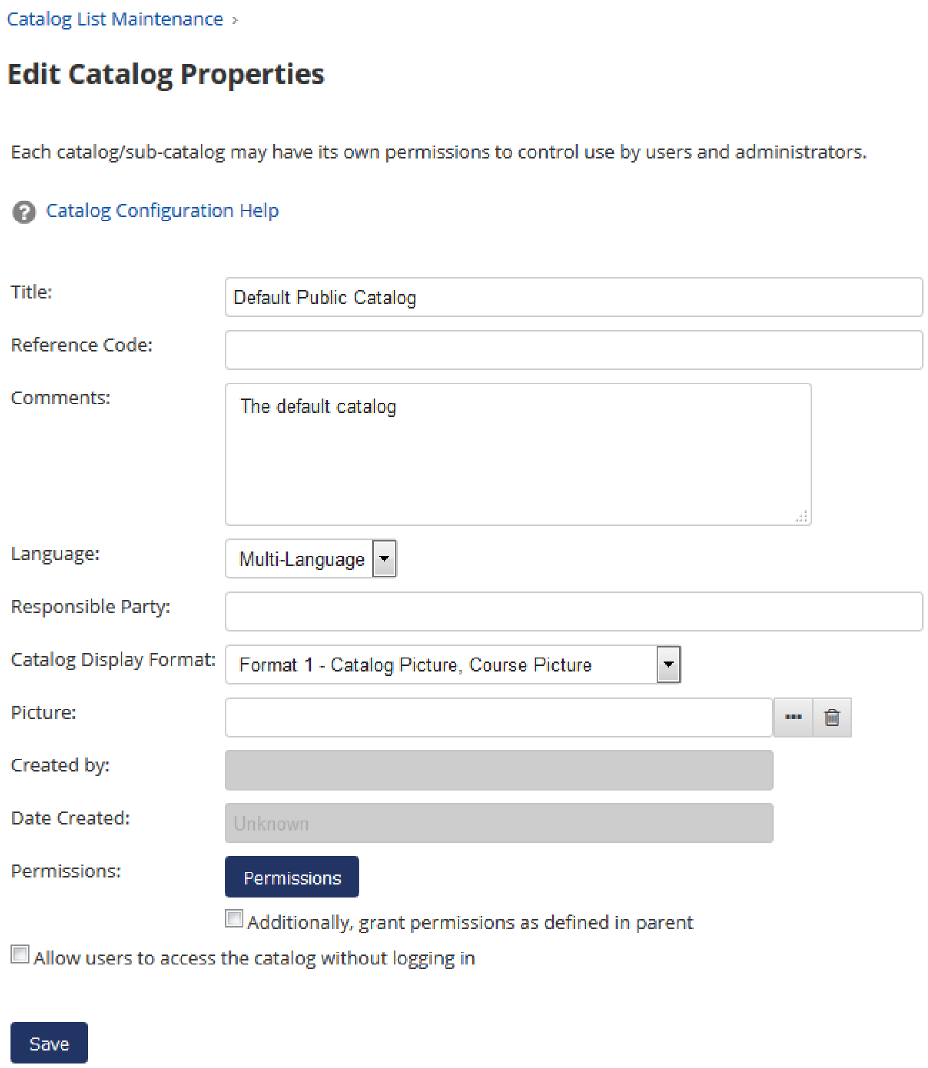
- the display of the catalog metadata is based upon the system Auto-Select mechanism, mainly trying to match to show in the user's preferred language before defaulting to the primary language if that's not available
- each catalog level can be configured with its own set of bundles
- since each level has its own set of language versions, the catalog hierarchy display of a particular branch with levels being shown in their own language independently, it could be in different languages if the bundle setup lacks any particular language version on a particular level.

Bundle Administration

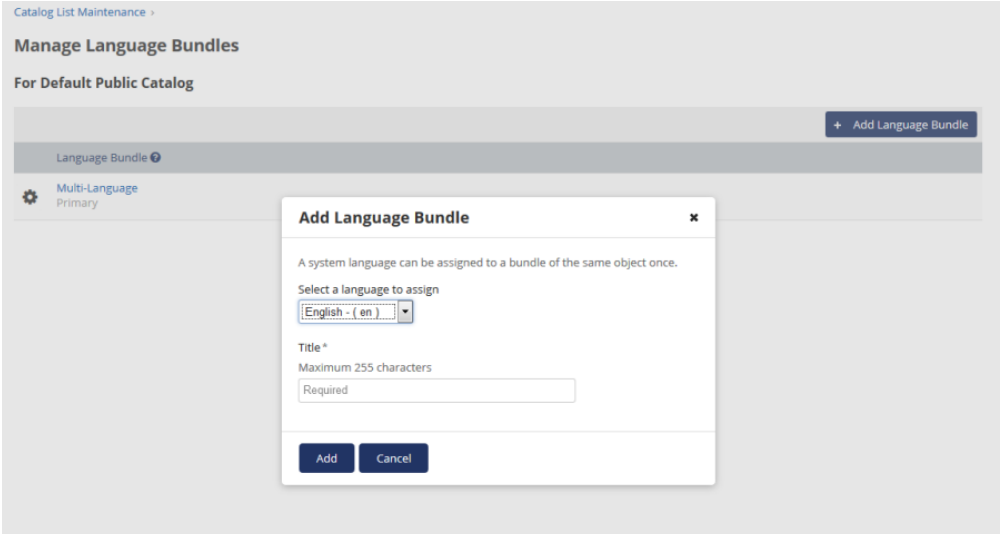
If the catalog should support additional language versions then there's a new administrative menu called "Manage Language Bundles" to manage the additional language versions which are considered as secondary. It can be found under the gear icon of a catalog listed in the hierarchical tree when drilling down to a particular level on Catalog List Maintenance.



The primary language of the catalog level can be assigned or changed on the Catalog Properties screen or via the Manage Language Bundles menu to switch to another language.



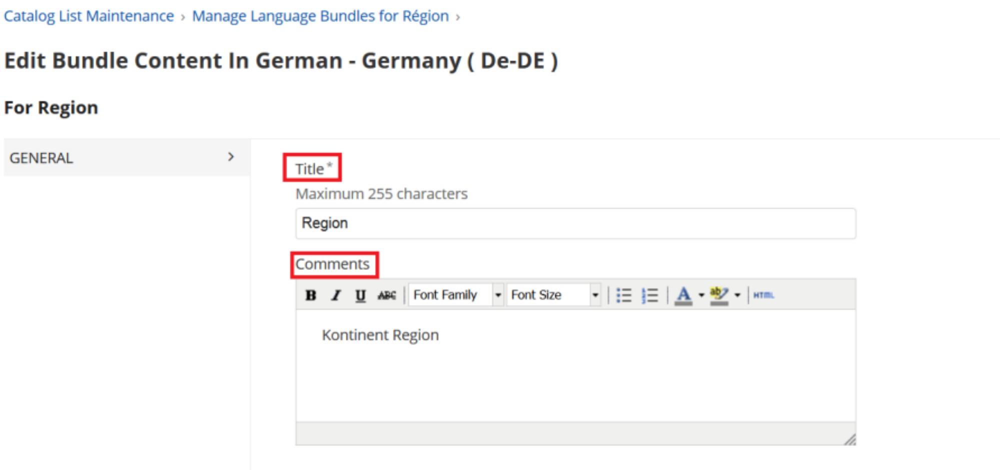
Similar to learning objects, whenever a new catalog level is created, it's created in the primary language via the Catalog List Maintenance page, additional language versions are added or maintained via the language bundle administration.



Each language bundle has menu actions to edit its content or switch bundle language to another available for that catalog object.

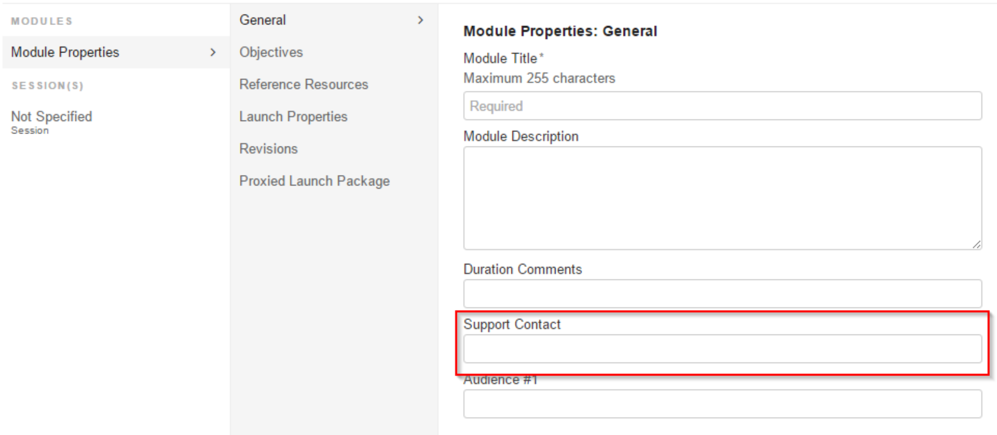
For a secondary language bundle, an administrator can set permissions on who can access its content or delete it. By default, read permission is set for all on creating a new language bundle. This is to allow translators and administrators to see what language versions have been created for the catalog object to avoid creating any duplicate. Write permission can be individually assigned.

The catalog clone feature supports language bundle cloning onto the new copy of the catalog. When the entire hierarchy of catalogs is cloned, all of its bundles (for each individual level) will be cloned as well, using the same catalog bundle metadata. The translatable fields that make up a catalog bundle are Title and Comments as shown below.



Support Contact field length

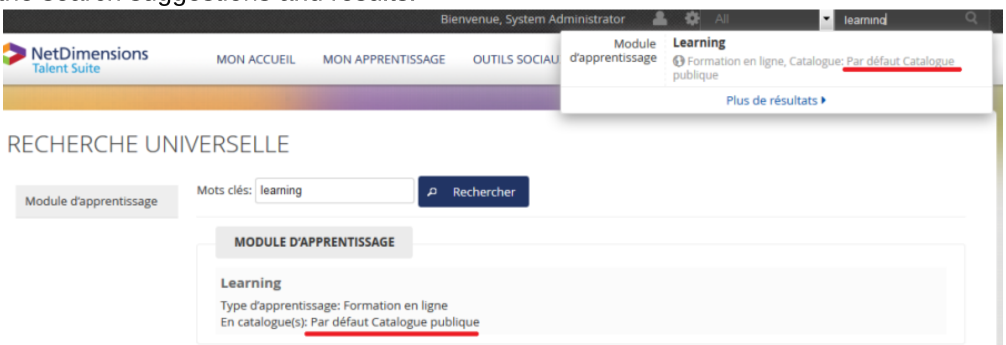
The Support Contact field length in the Language Bundle Editor can support up to 255 characters, allowing users to add more information, such as HTML tags, providing links to directly write an e-mail, etc.



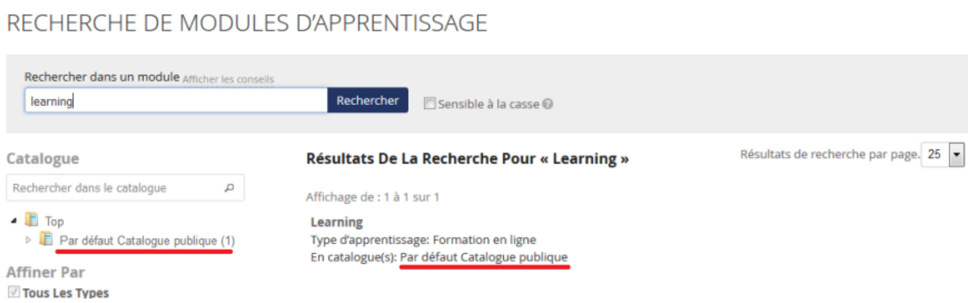
Dynamic Display of Multilingual Catalog Content

Displaying the catalog name in the system Auto-Select language has been applied to various areas. The course search areas now support the dynamic catalog name display including the Catalog Search and Universal Search.

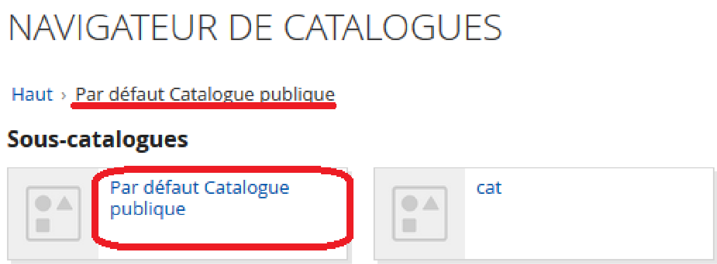
In the Universal Search, the catalog name will be displayed according to user's language preference in the search suggestions and results.



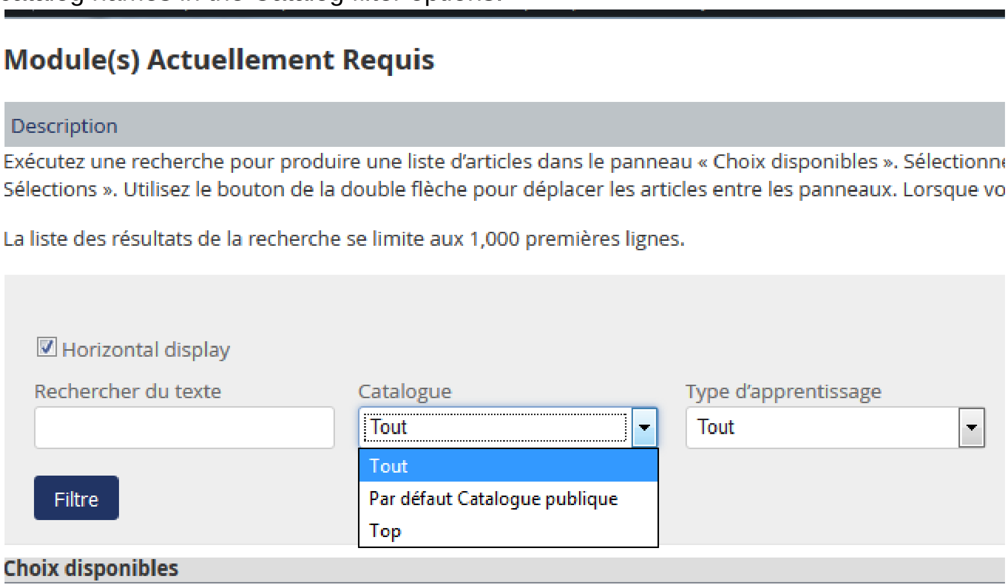
In the Catalog Search, the left-hand catalog filter with the hierarchical drill down and the catalog name displayed in the search results both now support the dynamic name display.



In the Catalog Browser, the catalog folder name as well as the navigation breadcrumb support the dynamic catalog name display.



The same dynamic catalog name display has been applied to the module selector namely, the visible catalog names in the Catalog filter options.



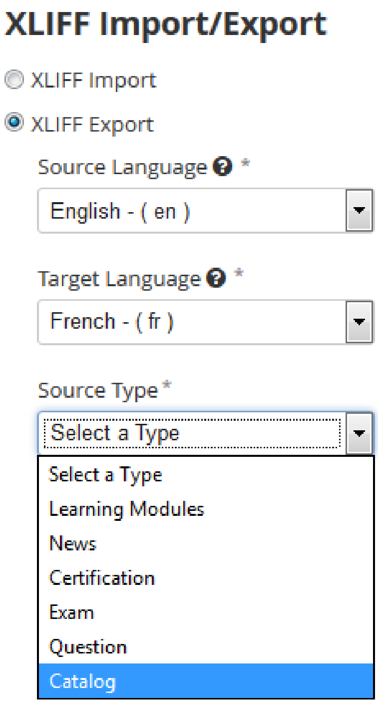
XLIFF Exchange

XLIFF Support for Exams and Questions

Since Multi-Language support has been added to exams, questions and catalogs in this release, translatable data configured in a bundle can also be exchanged in XLIFF 2.0 format.

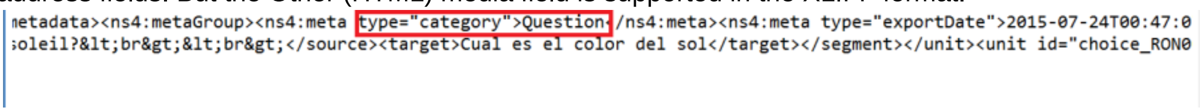
1. Export

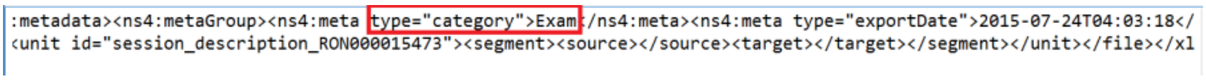
For the export function, these three additional object types have been added for export selection, exam, question and catalog. Select a source language to translate things from and a target language to translate things to. Then all relevant exams or questions with that selected source language as the primary language will be exported with their translatable fields or there is a selector to further select specific items to export.



2.Import

The import function supports XLIFF 2.0 format data for all these three new object types. An XLIFF file that includes the following object types can be defined with the target language specified for the particular record including all if its translated data. Note that data of different object types can be processed together in a single XLIFF file for import. Please refer to the catalog, exam and question bundle-level fields mentioned in the other sections. There are some question media fields that are not supported in the XLIFF format including Image URL, Audio URL and Video URL fields since they are address fields. But the Other (HTML) media field is supported in the XLIFF format.





Importing Courseware

(applies to NetDimensions Talent Suite)

Before you install and configure courseware, you should configure your catalogs and you should also configure Debug and Tracing options. Once you have set up your catalogs, if possible determine whether the course is an AICC-compliant package or SCORM courseware.

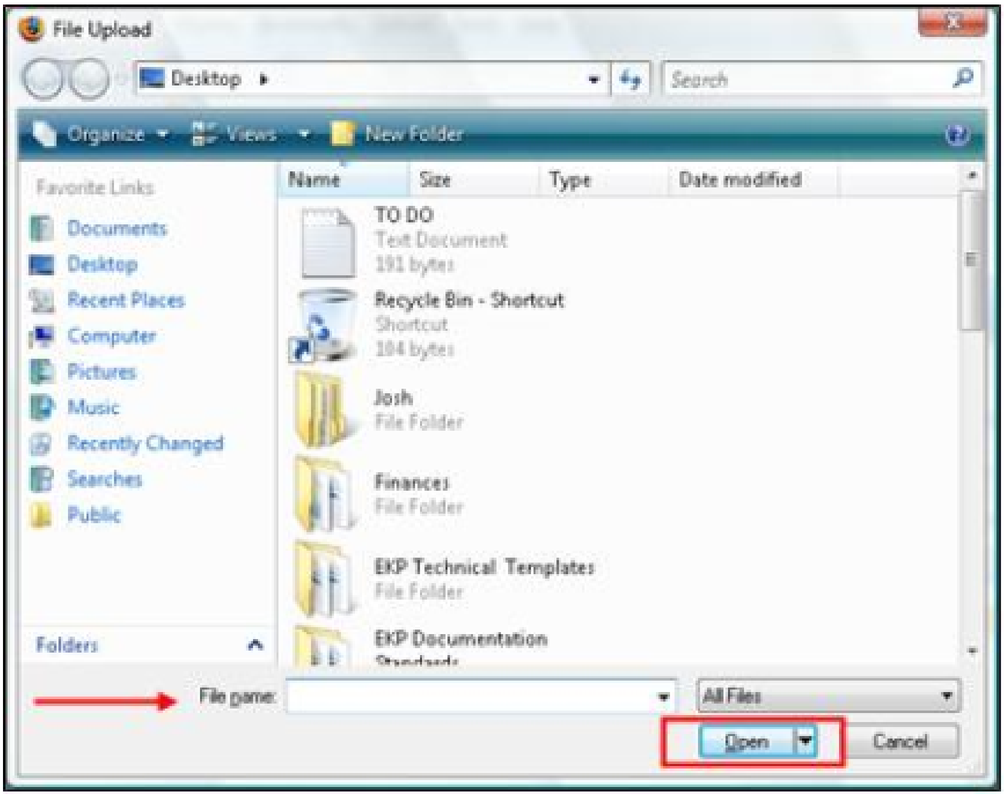
Import and Configuration of SCORM and AICC Packages

SCORM packages need to come as a ZIP file in order to be imported into the Talent Suite. In addition to import individual AICC course files and upload the media files using the Repository Manager can also import AICC courses, the Talent Suite alternatively provides an easy upload option. For this, you need to open the folder in which the course files reside, select all files, and "zip" them using programs like WinZIP or WinRAR on Windows or by using the "Compress Items" menu item on Mac OS X.

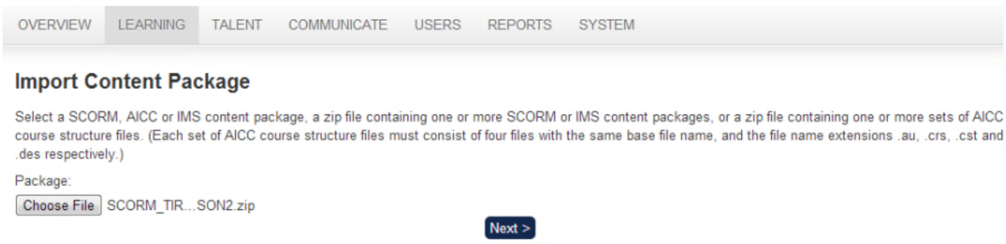
Importing a single SCORM or AICC Package

1.Click **Manage Center > Learning > Import > Import Content Package**. The *Select Content Package* screen appears.

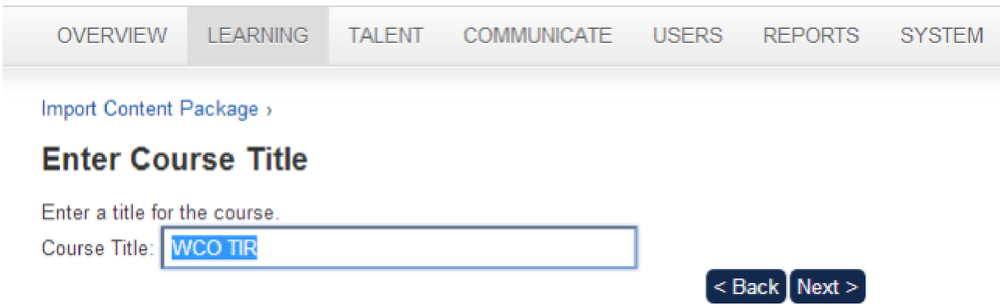
2.Click **Choose File**. A separate *Windows Choose File* screen opens.



3.Select the SCORM package to be installed and click **Open**. The file name is copied to the *Select Content Package* screen.

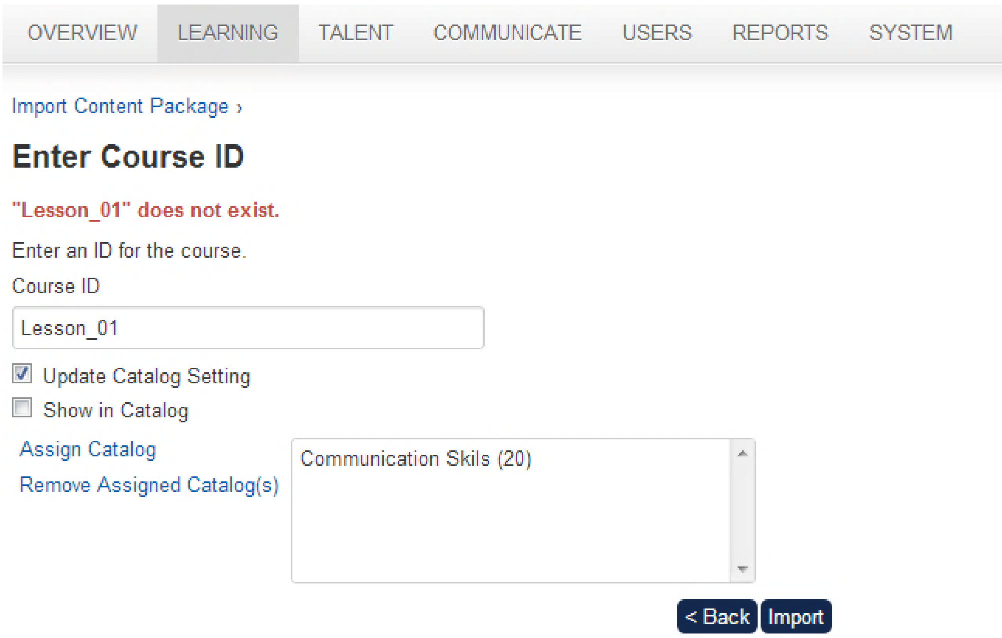


4.Click **Next**. The Enter Course Title screen appears.



5.The Talent Suite will display the default title that is provided by the course package. Should you wish to change the title, overwrite the current title.

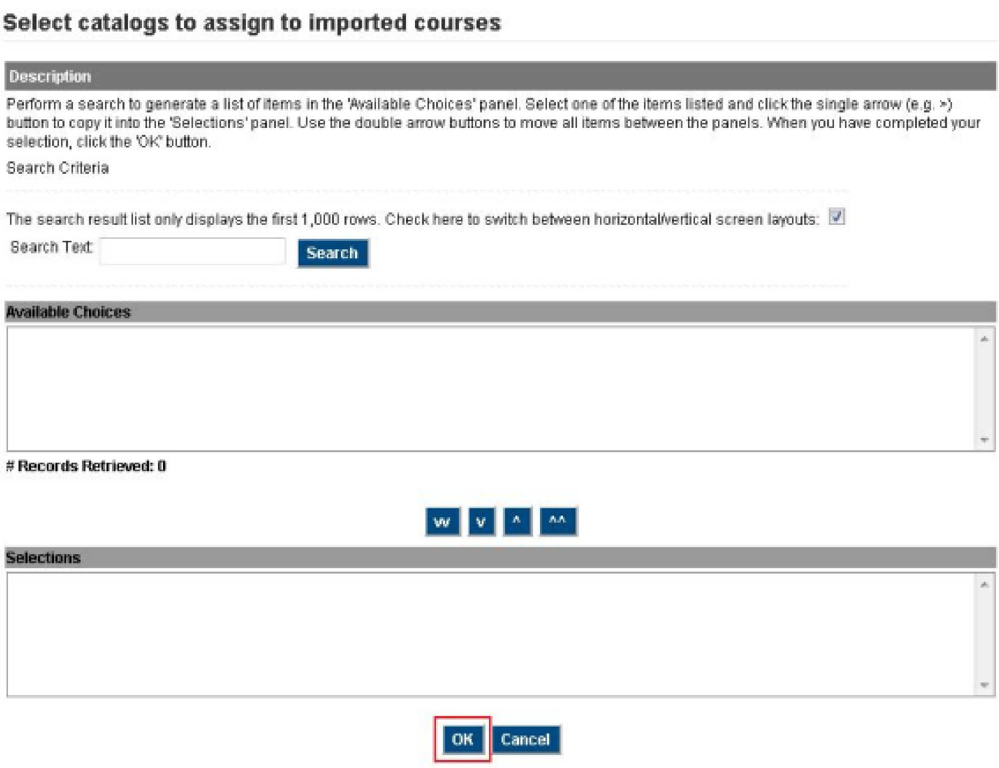
6.Click Next. The Enter Course ID screen appears.



7.The Talent Suite will display the default ID. Should you wish to change the course ID, overwrite the current identifier.

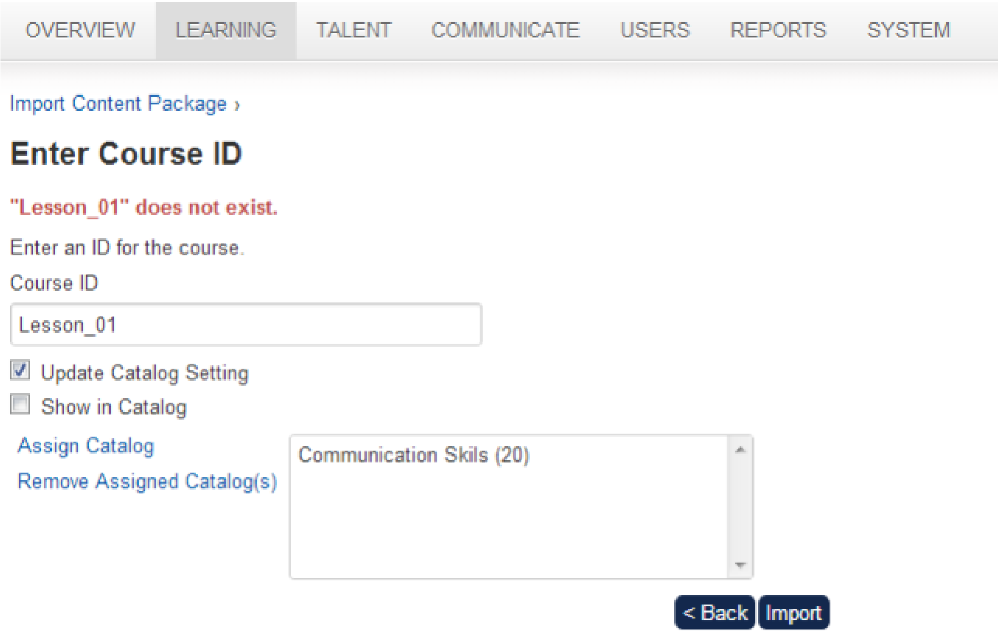
8.To display this course in the Catalog, click on the box to the right of *Show in Catalog*.

9.Assign catalogs, click on the **Assign Catalog** hyperlink. The *Select catalogs to assign to imported courses* screen appears.

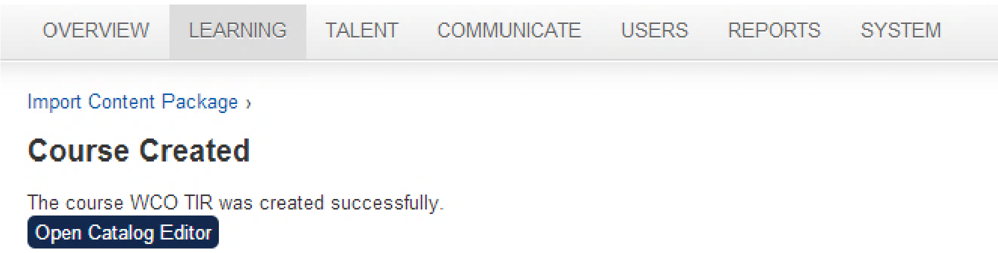


10.Make your selection(s).

11.Click **OK**. Your selection appears in the *Enter Course ID* screen.



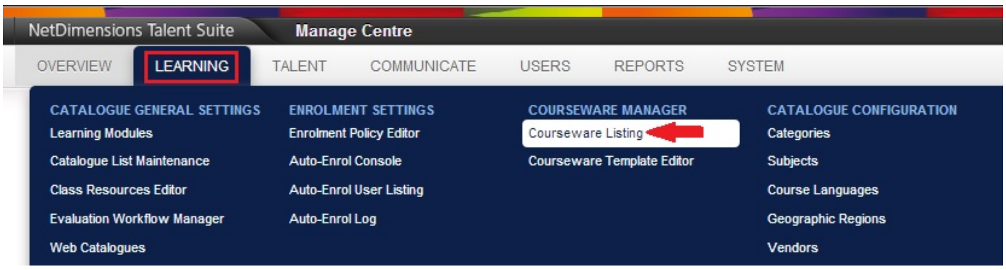
12.Click **Import**. The *Course Created* screen appears.

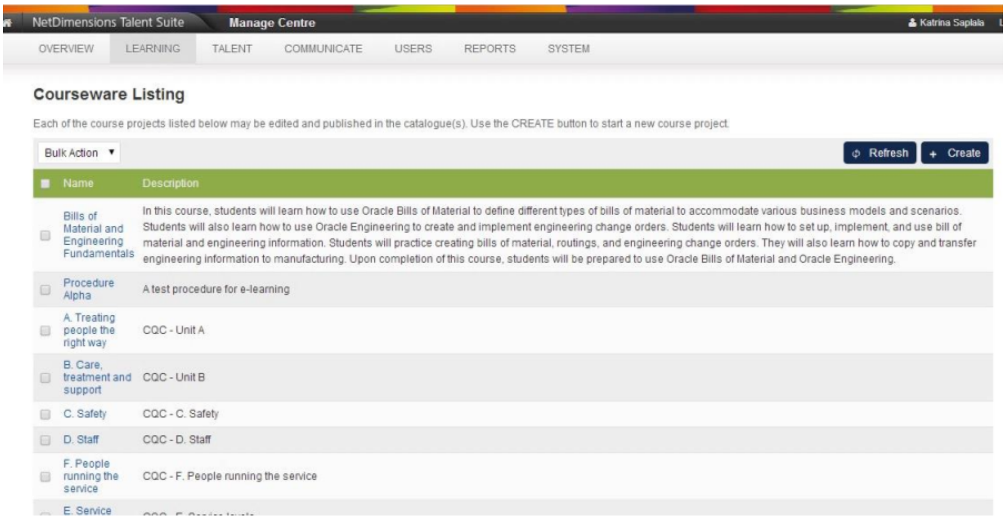


Note: The course can be assigned to one or more catalog(s) instead of just importing to the Default Public Catalog. This catalog assignment option is also available when the user publishes a course using the Courseware Editor.

To access the Courseware Editor:

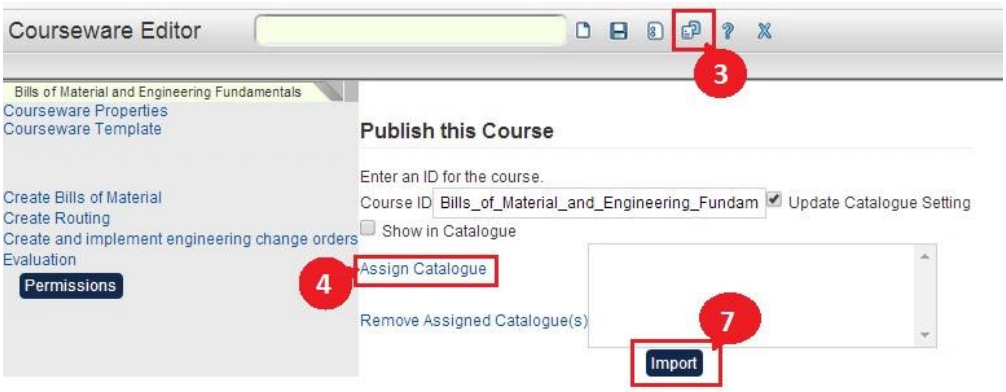
1.Click **Manage Center > Learning > Courseware Manager > Courseware Listing**. A list of course projects appears.





2.Click on the hyperlink of the course project. The *Courseware Editor* screen appears.

3.Click the **Publish this Course** icon in the toolbar menu. The *Publish this Course* screen appears.



4.Assign catalogs, click on the Assign Catalog hyperlink. The *Select catalogs to publish the course* scre en appears.

5.Make your selection(s).

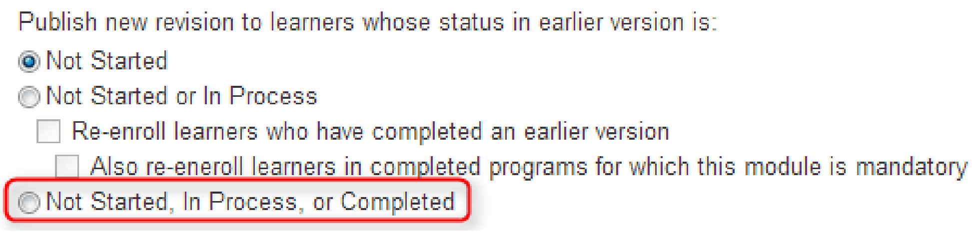
6.Click **OK**. Your selection appears in the *Publish this Course* screen.

7.Click **Import**.

Remove "publish for all" Option

A new configuration has been added that prevents administrators from publishing a new revision of a course to learners who have already completed the course.

When this configuration is enabled, administrators have the option to publish a new revision of a course to learners whose status in earlier revisions is Not Started, In Process, or Completed.



Configuring a SCORM Course

To configure a SCORM learning module:

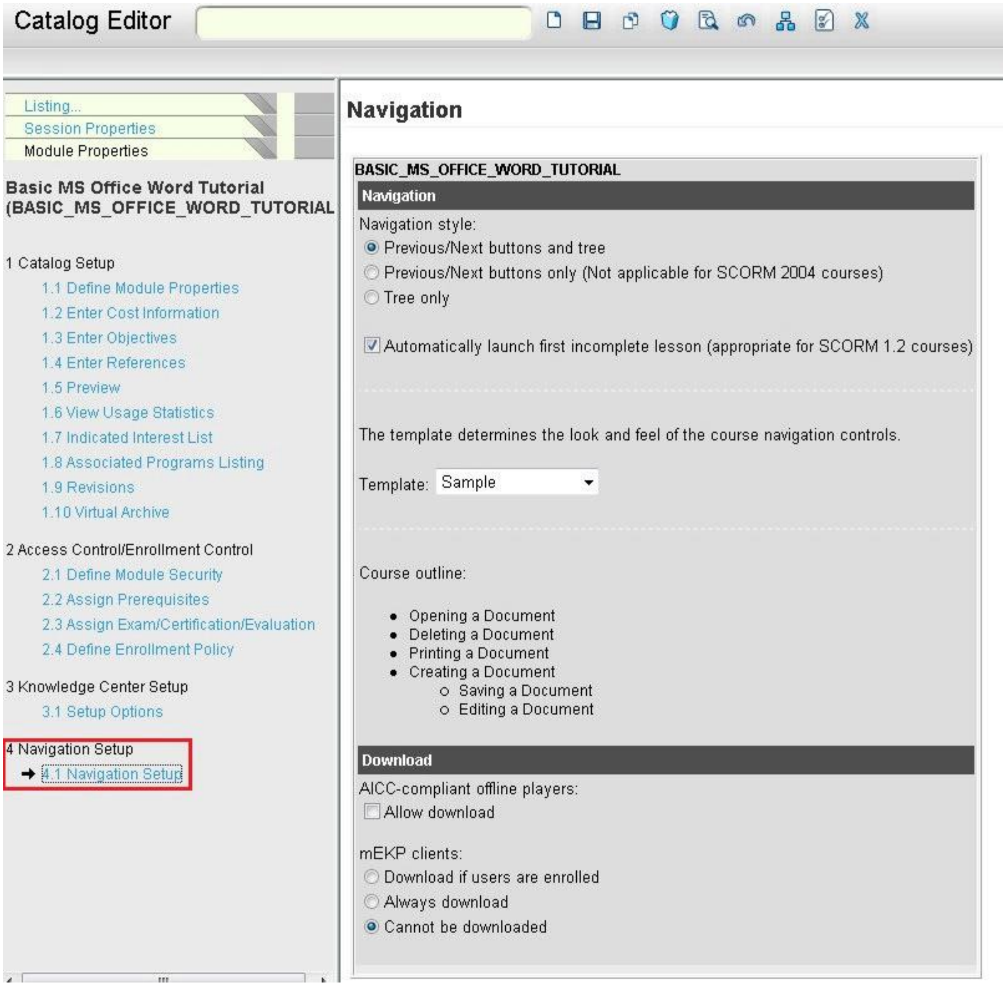
1.Click **Open Catalog Editor**. The Catalog Editor displays the module's properties.

2.Define the module properties. (See Edit Online Module Properties.)

3.Click **Navigation Setup**.

4.Configure the SCORM Navigation.

5.Click the **Save** icon at the top of the Catalog Editor.



6.Specify the navigation options. You can choose to:

- Display both the tree (i.e. the navigation bar on the left) and the Previous and Next buttons.
- Display only the tree.
- Display only the Previous and Next buttons.

7.If you do not want the lesson automatically open to the last incomplete session, clear the box labeled *Automatically launch first incomplete lesson*.

8.Click the **Save** icon at the top of the Catalog Editor.

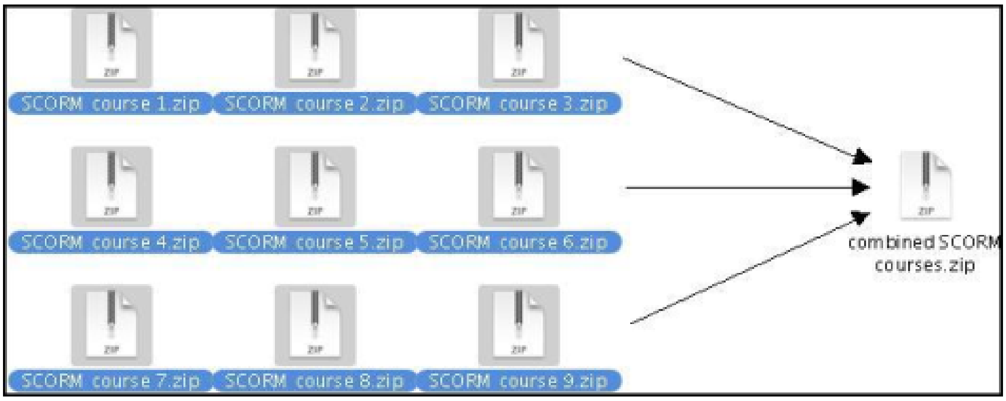
9.Click **OK**.

10.Proceed to define session properties.

Import of Multiple SCORM or AICC Courses

If you have a larger number of SCORM or AICC courses, you can upload them in batches. To do this:

1.Select a number of SCORM or AICC course ZIP files and zip them again using e.g. WinZIP or WinRAR on Windows or "Compress Items" on Mac OS X.



2.Click **Import Content Package** in Catalog Manager. The *Select Content Package* screen appears.

3.Click **Browse**. A separate *Windows Choose File* screen opens.

4.Select the SCORM package to be installed and click **Open**. The file name is copied to the *Select Content Package* screen.

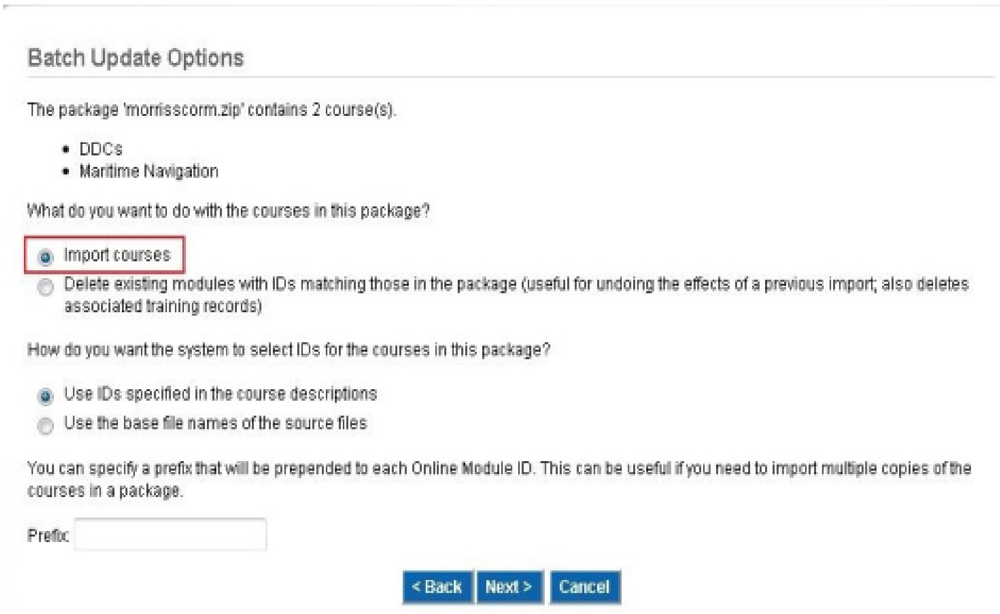
5.Click **Next**.

6.The Talent Suite displays the courses contained in the combined SCORM courses ZIP file.

7.Select **Import courses** (the default setting).

8.Optionally you can enter a prefix, e.g. to specify the kind of courses you are uploading or the date. If you want to delete courses that have a prefix, you need to supply the prefix, too.

9.Click **Next**. The *Batch Import Details* screen appears.



10.Select the language of the courses you are about to import.

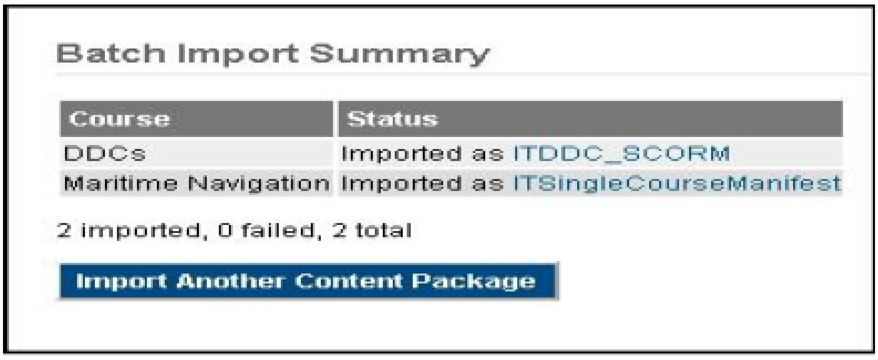
11.Select if the courses shall be shown in the catalog.

12.Assign the catalogs in which the courses shall be shown.

13.Define Permissions.

14.For standard SCORM or AICC courses, you do not need to check the Tracking checkbox.

15.Click **Import**. The *Batch Import Summary* screen appears.



16.To see or edit a learning module's catalog entry in the Catalog Editor, click on the module ID on the right.

Note: The batch upload/import *cannot* be used to upload new versions of existing courses. Doing so will result in a failed batch upload.

17.You may either use the menu on the left or import more content packages.

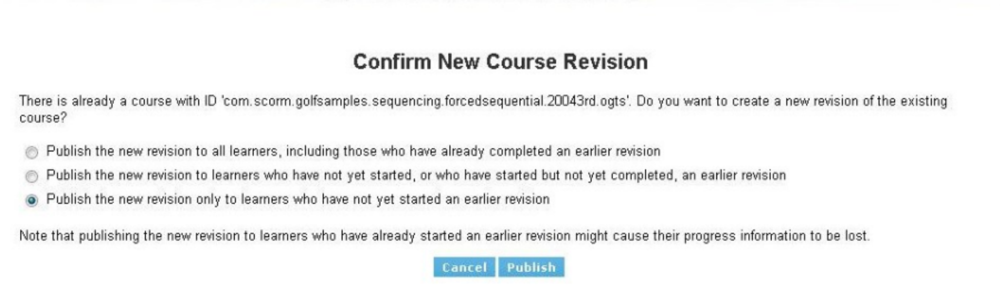
Uploading a New Version of a SCORM or AICC Course

To upload a new version of an existing course, the new course must have the same module ID as the previous version; otherwise the Talent Suite will not recognize it as a new version but as a new on-line learning module. To upload a new version of a course:

1. Click on **Import Content Package** in Catalog Manager. The *Select Content Package* screen appears.
2. Click **Browse**. A separate *Windows Choose File* screen opens.
3. Select the SCORM package to be installed and click **Open**. The file name is copied to the *Select*

Content Package screen.

4. Click **Next**. The *Enter Course Title* screen appears.
5. Talent Suite application will display the default title that is provided by the course package. Should you wish to change the title, overwrite the current title.
6. Click **Next**. The *Enter Course ID* screen appears.
7. NetDimensions Performance application will display the default ID. Should you wish to change the course ID, overwrite the current identifier.
8. Click **Next**. The *Confirm New Course Revision* screen appears.



9.Click on the appropriate choice.

10.Click **Publish**. A confirmation screen appears.

11.To display this course in the Catalog, click **Open Catalog Editor**. If you want to import another learning module, click **Import Another Content Package**.

Batch Deletion of Multiple SCORM or AICC Courses

Single on-line learning modules can easily be deleted in the Catalog Manager. If you have a larger number of SCORM or AICC courses, you can delete them in batches using the Import Content Package feature. To do this:

1. You need a ZIP file containing the courses that you want to delete.
2. Click **Import Content Package** in Catalog Manager. The *Select Content Package* screen appears.
3. Click **Browse.** A separate *Windows Choose File* screen opens.
4. Select the SCORM package to be installed and click **Open**. The file name is copied to the *Select Content Package* screen.
5. Click **Next**. The *Batch Upload Options screen* appears.
6. NetDimensions Performance application displays the courses contained in the combined SCORM courses ZIP file.
7. Select **Delete existing modules…**
8. Optionally you can enter a prefix. To delete courses that had a prefix assigned during upload, you need to supply the prefix too.
9. Click **Next**. The *Batch Import Details* screen appears.
10. To confirm the deletion, click **Delete**. The *Batch Delete Summary* screen appears.

BATCH DELETE SUMMARY

Course	Status
Java - Advanced Programming	Deleted
Java - Basic Programming	Deleted
Mac OS X Server - NetBoot Administration	Deleted
Managing Ethernet Networks	Deleted
MySQL - Managing Database Catalogs	Deleted
Objective C - Advanced Programming	Deleted
Set-up and Administration of Wireless LANs	Deleted
Solaris - System Administration Basics	Deleted
Windows Server - Advanced Administration	Deleted

9 deleted, 0 failed, 9 total

Import Another Content Package

11.To import or delete other learning modules, click **Import Another Content Package**.

Import and Configuration of AICC Courseware

In general, AICC-Compliant files should have:

- An Assignable Unit (.AU) file
- A course (.CRS) file
- A course structure (.CST) file
- A descriptor (.DES) file

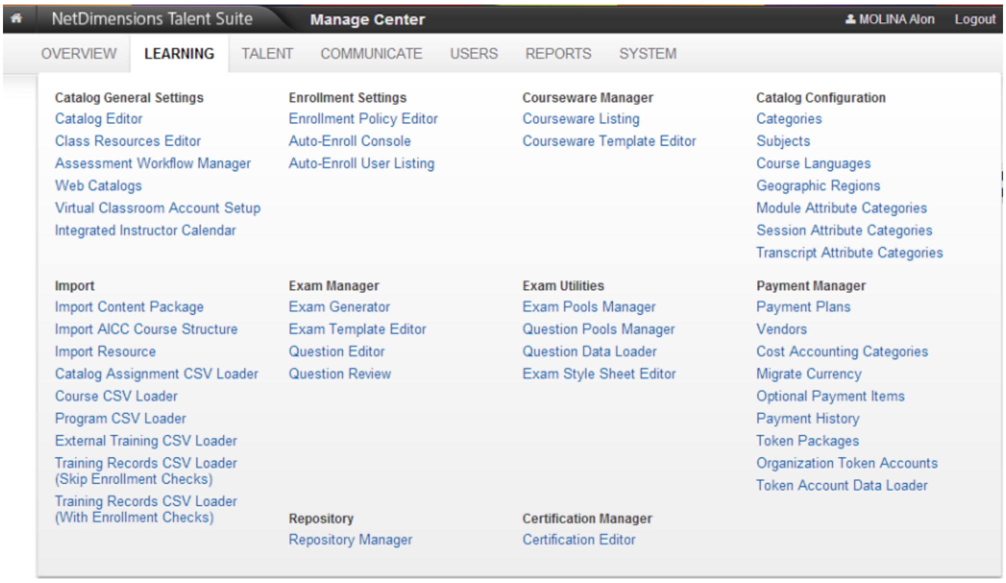
Import Archives of One or Multiple Sets of AICC Structures

As an alternative of uploading AICC structure files individually and to upload multiple sets of AICC structure files, all files can be put into a ZIP archive and be uploaded as one content package. The four files of each set must have the same name followed by the AICC extensions, i.e.

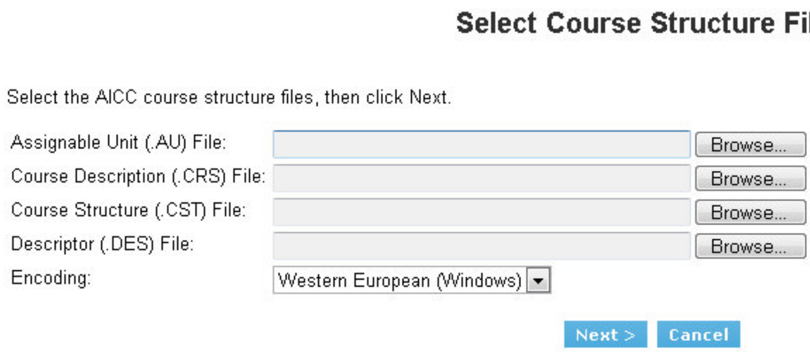
```
Course1.au Course2.au … CourseN.au
Course1.crs Course2.crs … CourseN.crs
Course1.cst Course2.cst … CourseN.cst
Course1.des Course2.des … CourseN.des
```

Import AICC Structure Files

To create online modules from AICC course structure files, import the AICC course structure.



1.Click **Manage Center > Learning > Import > Import AICC Course Structure**. The *Select Course Structure Files* screen appears.



2.To import the Assignable Unit (**.AU) file, click *Browse**. A separate *Windows Choose File* screen opens.

3.Select the Assignable Unit file to be installed and click **Open**. The file name is copied to the *Select Course Structure Files* screen.

4.Repeat Steps 2 and 3 for the *Course* (.CRS), *Course Structure* (.CST) and *Descriptor* (.DES) files.

5.Click the drop down menu by the *Encoding* field then click on the desired selection.

6.Click **Next**. The *Enter Course Title* screen appears.

7.The Talent Suite will display the default title (which comes from the AICC files, not NetDimensions Performance Application). Should you wish to change the title, overwrite the current title.

8.Click **Next**. The *Enter Course ID* screen appears.

9.The Talent Suite will display the default ID. Should you wish to change the course ID, overwrite the current identifier.

10.To display this course in the Catalog, click on the box to the right of *Show in Catalog*.

11.Click I**mport**. The *Course Created* screen appears.

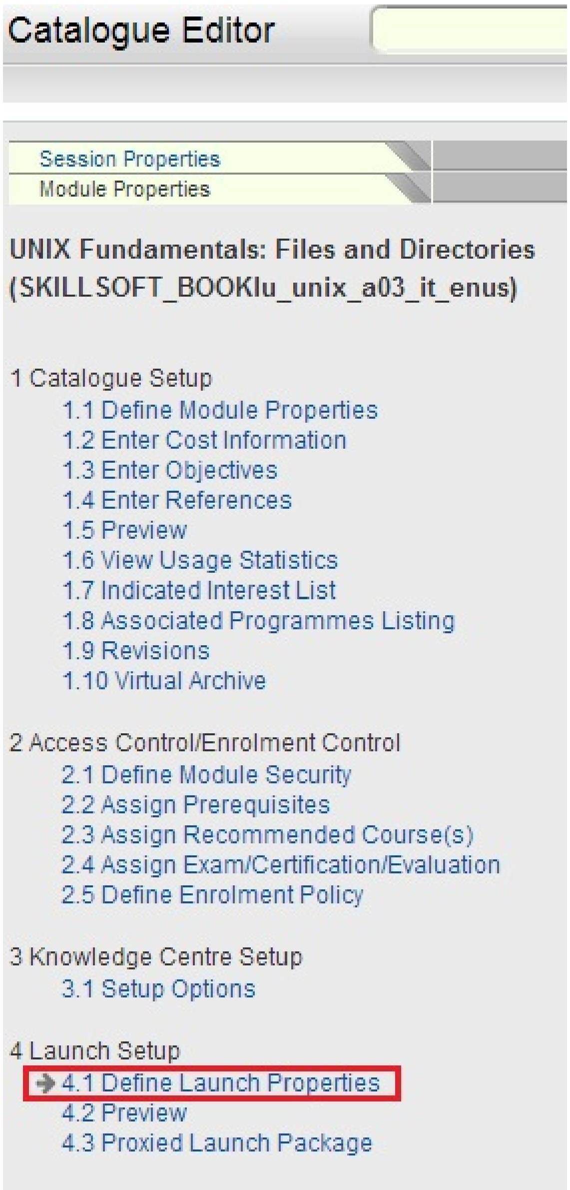
12.Click **Open Catalog Editor**. Proceed to configure the new learning object.

13.After importing the AICC Course Structure files, proceed to import the requisite media files in the

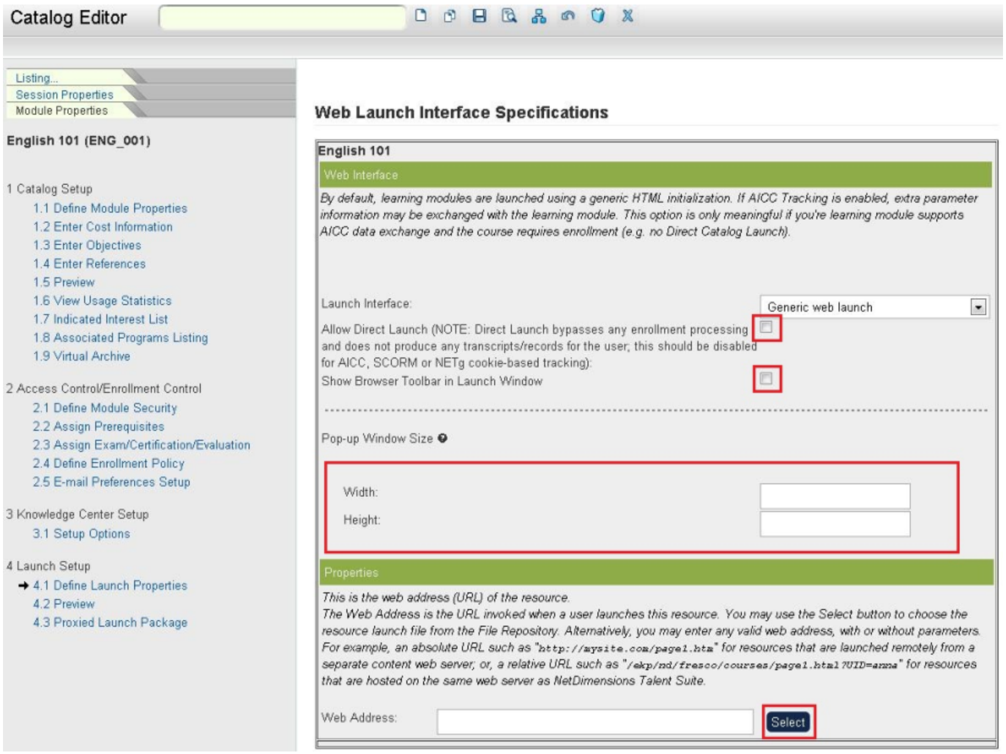
Repository Manager.

Specify AICC Assignable Unit Properties

1.Select Define Launch Properties in the Catalog Editor.



2.Select AICC Assignable unit in the *Launch Interface* field. By making this selection, extra parameter information may be exchanged with the learning module. This option is only meaningful if your learning module supports AICC data exchange and the course requires enrollment (e.g. no Direct Catalog Launch).



3.Specify the desired width and height of the launch window.

Note:

- The course specific window size setting applies to that particular course's pop-up window. For example, when course A is launched, the setting is for the window size of the launched course only (i.e. the window where users take the course).
- When the width and height of the course specific settings are left blank, the default settings from System Configuration will be used to launch the course window.
- The course specific window size setting option will cover the following Learning Object types:
    - Classroom
    - Coaching
    - Exam
    - External Certification
    - Online
    - On the Job Training
    - Self Training (Paper)
    - Self Training (Video)
    - Special interest group
    - Virtual Classroom
    - Virtual Classroom (Archived)
    - Workshop/Seminar

4.To select the Launch URL, i.e. the page invoked when the participant starts this learning module, enter a valid http address in the Web Address field. This address, as long as it is a valid http address, can be entered with or without parameters. For example:

```
/nd/fresco/courses/page1.html?UID=anna.
```

5.Specify whether to accumulate time with a module. Click on the appropriate box. (This box must be checked for SkillSoft courses)

6.Enter the rest of the properties.

7.To save, click the **Save** icon at the top of the **Catalog Editor**.

8.A confirmation dialog box appears

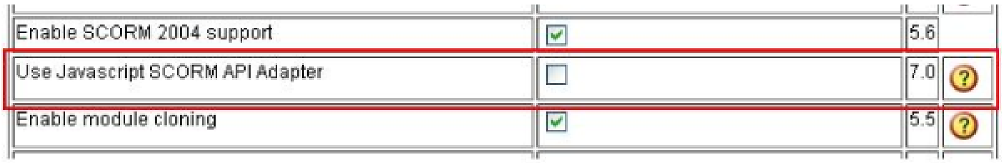
9.Click **OK**.

Javascript SCORM API adapter

The SCORM API adapter helps a SCORM module to communicate with the Talent Suite so your progress and results from a SCORM module can be saved and retrieved. The Talent Suite supports this communication through a Java applet version of SCORM API adapter. This adapter requires the Java Runtime Environment (JRE) to be installed on the client PC. The new SCORM API adapter runs on Javascript and does not require the JRE to be installed on the client computers. By default, the Talent Suite uses the Java applet version of SCORM API adapter to run SCORM modules.

To switch to the Javascript version of SCORM API adapter:

1. Log into NetDimensions Performance Application as the system administrator.
2. Click **Manage Center > System > General Settings > System Configuration**.
3. Selecting Catalog from the *Select a category* field.
4. Click on the "Use Javascript SCORM API Adapter" option. If you check this option and save, all the SCORM module communication will be done using the Javascript version of SCORM API adapter.



5.To switch back to the Java applet version, un-check the same option and save.

Courseware Management

(applies to NetDimensions Talent Suite)

To use on-line courseware, it must be uploaded to the Talent Suite application. This is a very easy four-step process, which guides you and prompts you for optional input. There are two main standards for on-line courseware, SCORM and AICC. The Talent Suite can handle all courses that comply with these standards. Most course vendors do so and most courses generated by the various authoring tools are, too.

Nevertheless, compatibility issues may occur. A list of tested courseware and authoring tools in the partners section is available at www.netdimensions.com. If your tool of choice is not listed, we also offer free content compatibility testing.

The Talent Suite also keeps track of different versions of the learning content, showing which user completed which version of a learning module. By default, only the course creator should have write permissions for a new Courseware project.

Catalog and courseware management involves the:

- Creation, set up and management of catalogs
- Definition and maintenance of:
  - Languages
  - Subjects
  - Geographic Regions
  - Financial categories (i.e. Cost Accounting)
- Creation of catalog entries
- Management of catalog entries including the updating of entries, display options (that is whether to display or not) and the inclusion of reference and other materials (e.g. exams)

Before installing and configuring coursewares, administrators should configure the catalogs as well as the Debug and Tracing options (for SCORM courseware).This section focuses on:

- Import of courseware
- Creation of catalog entries
- Management of catalog entries including the updating of entries, display options (that is whether to display or not) and the inclusion of reference and other materials (e.g. exams)

Enrollment and Enrollment Policies are covered in a separate section. Note that user groups can also be used as auto-enrol targets.

Configuring Categories

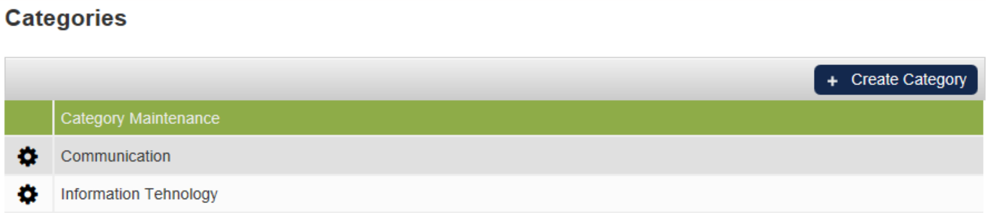
Adding Category

1.Select **Learning** > **Catalog Configuration** > **Categories**.

2.The *Categories* screen is displayed. Enter the new name of the category.

3.To keep the record, click **Save**

4.The new category would be displayed in the list.

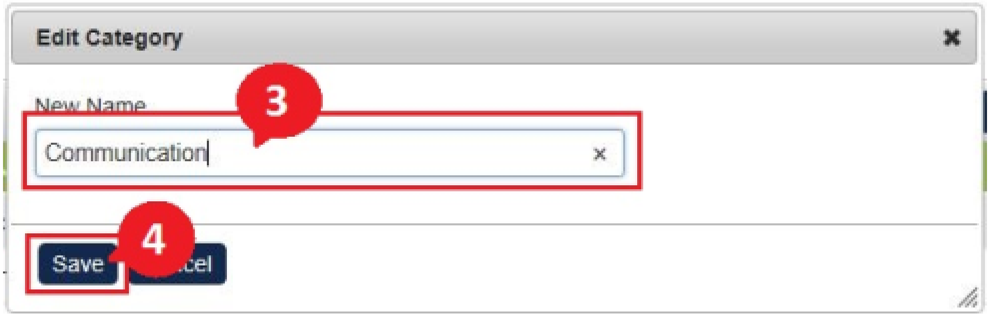


Editing Category

1.From the list of category, select **Configuration** icon of the category you want to modify.

2.A menu will be displayed on the screen. Select **Edit Category**.

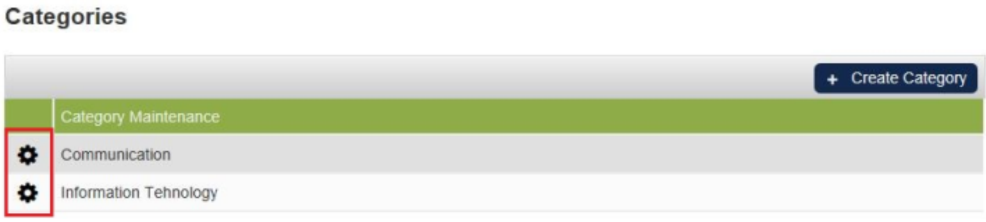
3.The *Edit Category* screen is displayed. Modify the name of the category.



4.Click the **Save** button to keep the update.

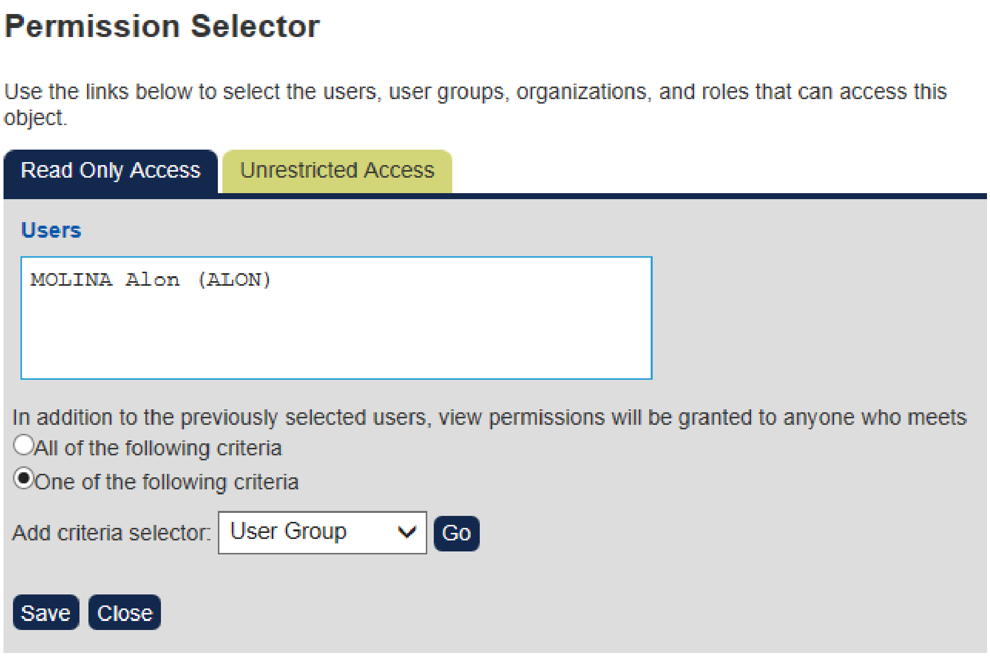
Setting Permission Category

1.From the list of category, select **Gear** icon of the category you want to modify.



2.A menu will be displayed on the screen. Select **Permissions**.

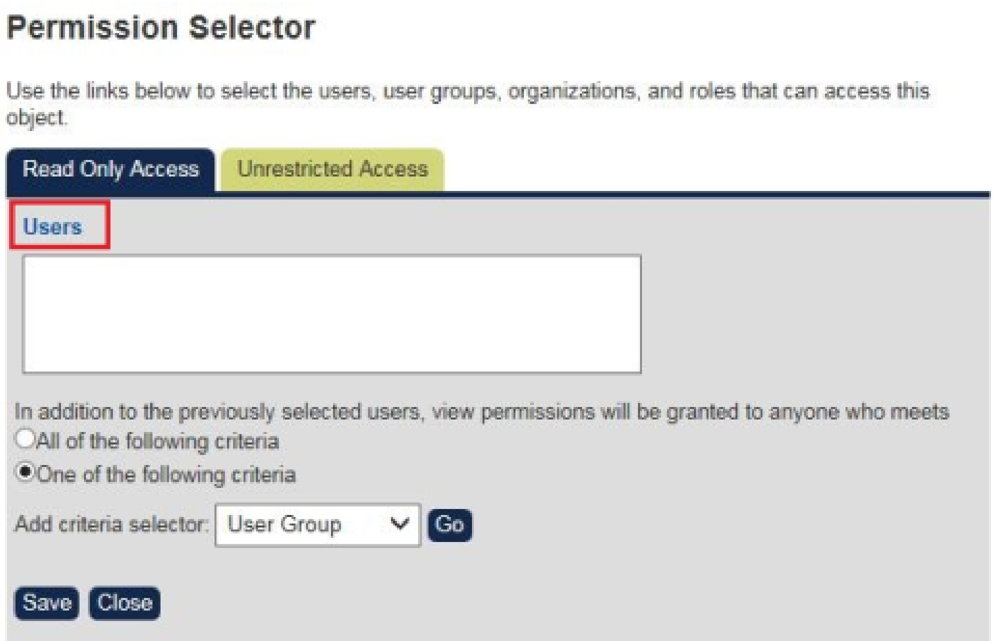
3.The *Permission Selector* screen is displayed. Configure the permission setting using the guideline below the image.



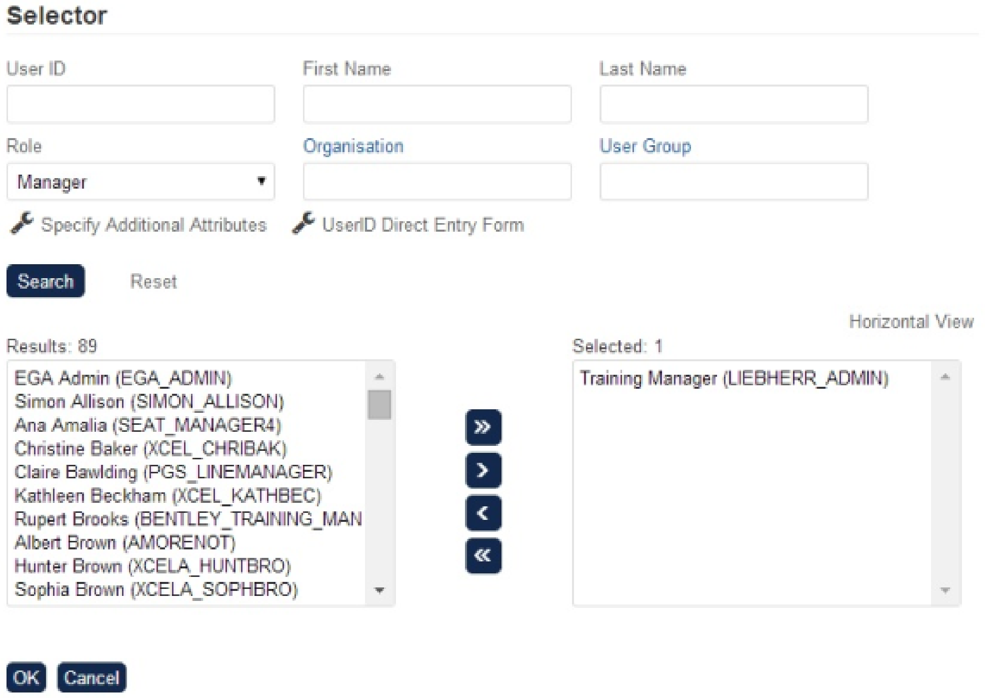
Prior to giving permission to a user or group of users, you need to select first the type of access you want to give to the user. There two types of access you can give to a user, namely;

- ***Read Only Access -*** Having READ permission means a user can:
  - see a Catalog Category but not perform any action
  - use a Category as search criteria in Learning Module Management
  - assign a Category to a Learning Module in Catalog Editor
- ***Unrestricted Write Access. -*** Having Unrestricted Write Access permission means user can also:
  - update/delete a Category
  - grant/revoke permissions assigned to a Category

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

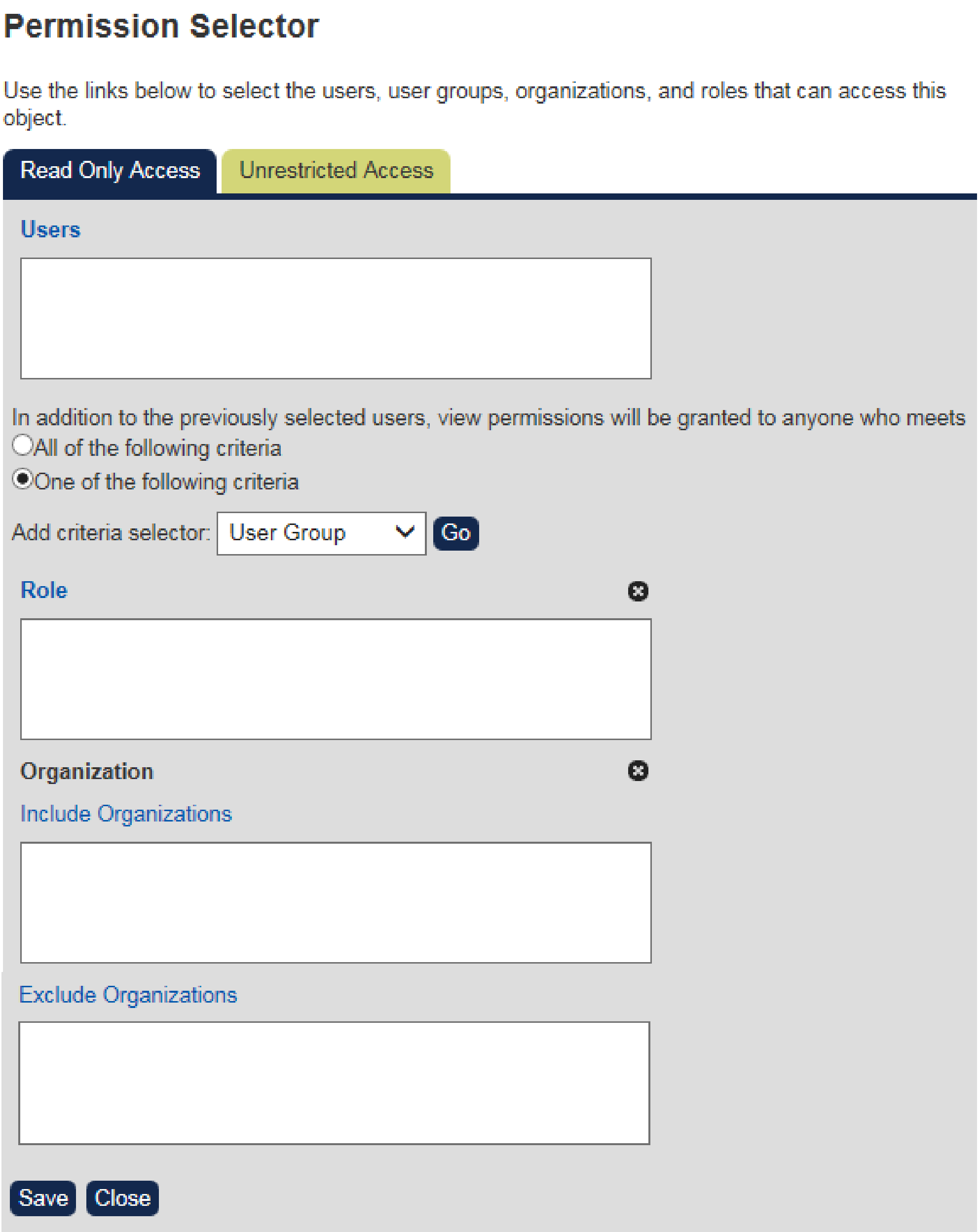


5.This opens the *User Selector* screen to select a specific user or group of users.



6.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 all users belongs to the criteria defined in the Add criteria selector. For instance that user added the criteria Role and Organization as shown in the image below.
  - This means that the user must belong to the roles AND organization in order for the user to access the permission to view the report.



- ***One of the following criteria***
  - This means that viewing permission can be granted to all users belongs to any of the criteria defined in the Add criteria selector.
  - This means that the user must belong to the roles OR organization in order for the user to access the permission to view the report.
- ***Add criteria selector***
  - This allows you to add criteria. To add the criteria, click the selector drop down button and then select the preferred criteria.

Note: For every selected criterion, a criterion box will be displayed. 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.

Configuring Languages

(applies to NetDimensions Talent Suite)

Activate a language at System Language Activation to allow it to be selected as a Course Language.

Configuring Subjects

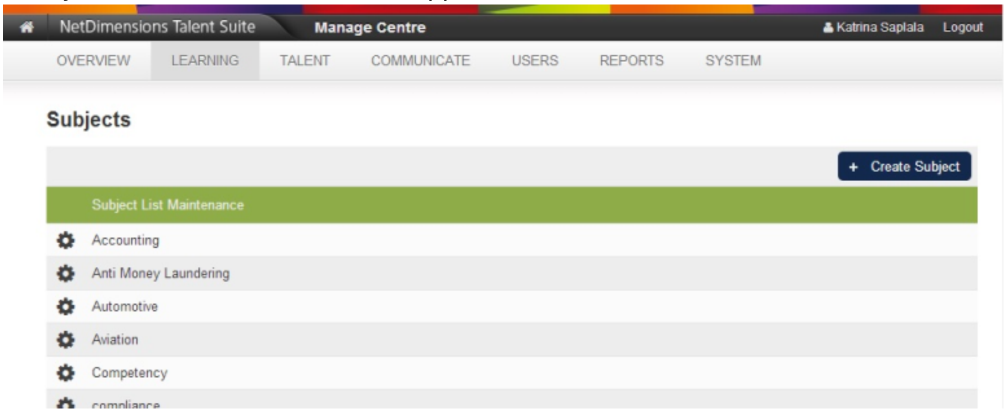
(applies to)

Subject categories, when employed effectively, can be an effective means of organizing courseware providing a user a guide as to what is available by subject and where to find it. Subject categories also can help users discover courseware they didn't know existed. However, the naming, application and management of subject categories must be done carefully. Problems may arise if, for example:

- The subject titles differ from the names typically employed by users or what users expect – for example while users may expect to find a listing of 'Banks' under 'Companies', they may not expect to find 'banks' as a sub-category of 'Financial Services'
- Course creators and indexers accidentally classify courses in the wrong subject category

In addition, new subject terms may need to be created but the proliferation of subjects must be balanced against the additional maintenance work additional subject categories may entail, remember that keeping catalogs up to date is very labor intensive.

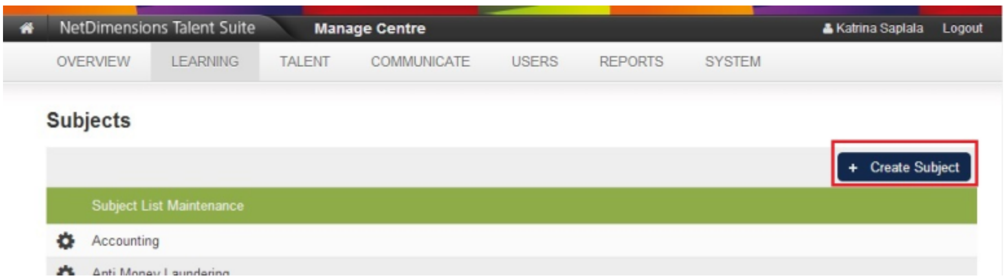
To maintain subject listings, click **Manage Center > Learning > Catalog Configuration > Subject.** Th e *Subject List Maintenance* screen appears.



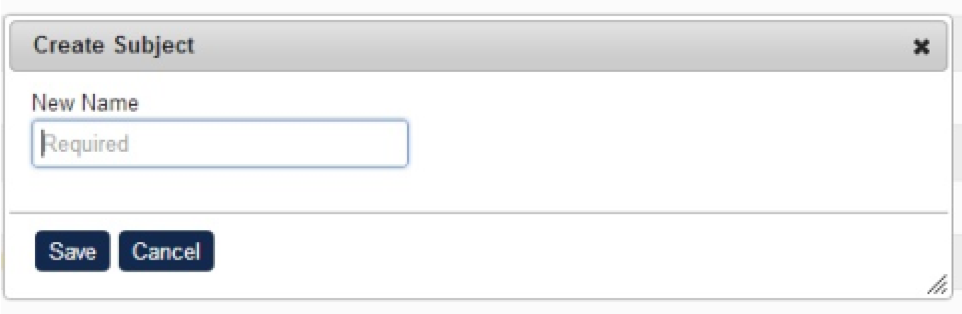
Adding Subjects

To add a new subject:

1.Click the Create Subject button



2.A pop up box will appear where you can type in the subject name.



3.Click **Save**. The application returns an acknowledgement.

Updating Subjects

To edit a subject listing:

1.Click the gear icon of the subject you wish to edit

2.The edit box will appear, make your changes accordingly and click **Save**

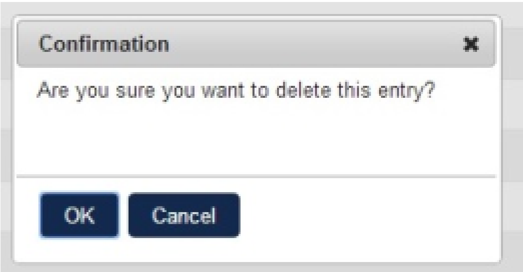
3.A confirmation dialog box appears.

Deleting Subjects

To remove a subject listing:

1.Click the gear icon of the language you wish to delete

2.Click **Delete Subject**. A confirmation dialog box appears.

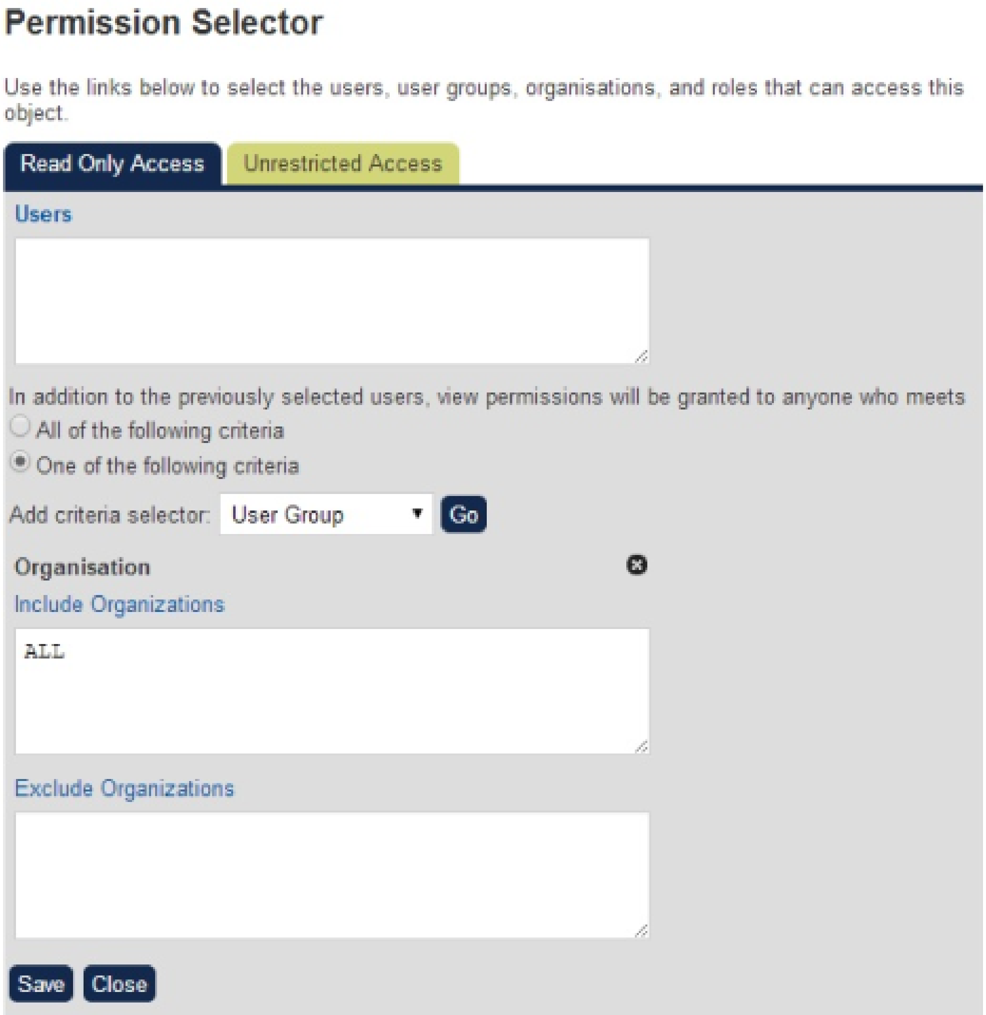


3.Click **OK**. The application returns an acknowledgement.

Setting Permission to Subject

1.From the list of category, select **Gear** icon of the category you want to modify then select **Permissions.**

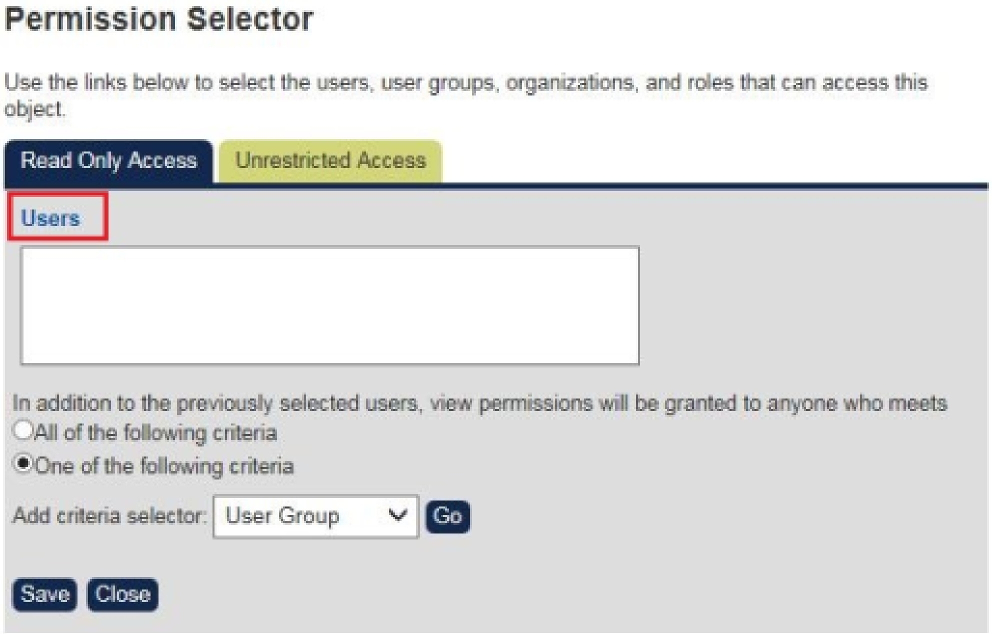
2.The *Permission Selector* screen is displayed. Configure the permission setting using the guideline below the image.



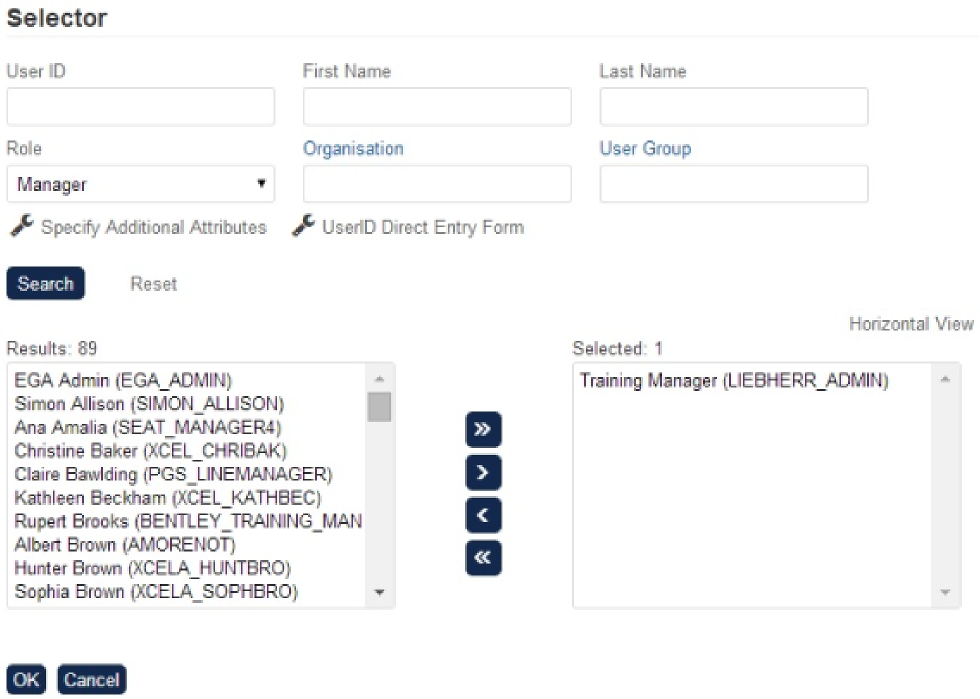
Prior to giving permission to a user or group of users, you need to select first the type of access you want to give to the user. There two types of access you can give to a user, namely:

- ***Read Only Access.*** **-** Having READ permission means a user can:
  - see a Subject but not perform any action
  - use a Subject as search criteria in Learning Module Management
  - assign a Subject to a Learning Module in Catalog Editor and Course CSV Loader.
- ***Unrestricted Write Access.-*** Having Unresctricted Write Access permission means user can also:
  - update/delete a Subject
  - grant/revoke permissions assigned to a Subjects

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

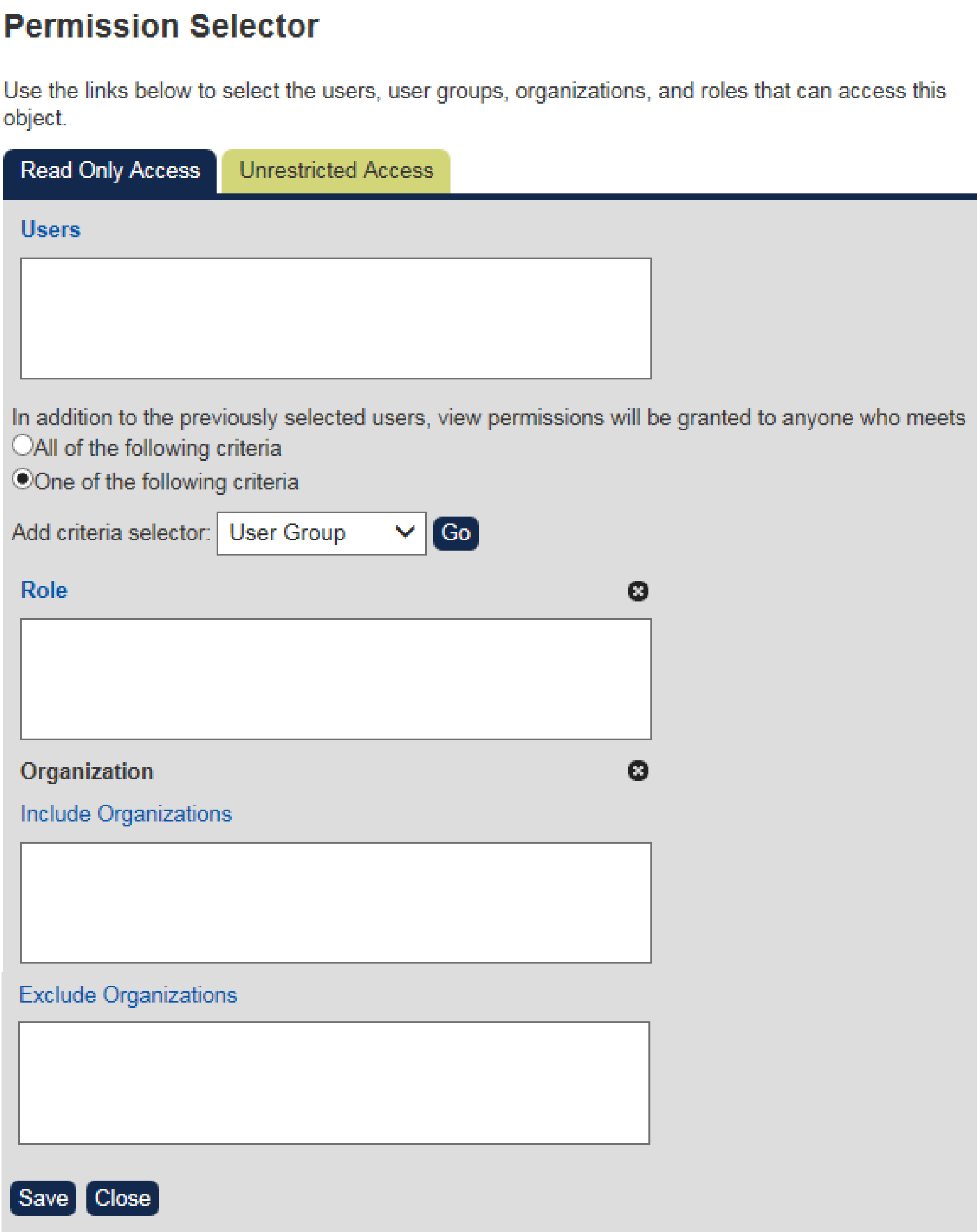


5.This opens the *User Selector* screen to select a specifi user or group of users.



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 all users belongs to the criteria defined in the Add criteria selector. For instance that user added the criteria Role and Organization as shown in the image below.
  - This means that the user must belong to the roles AND organization in order for the user to access the permission to view the report.



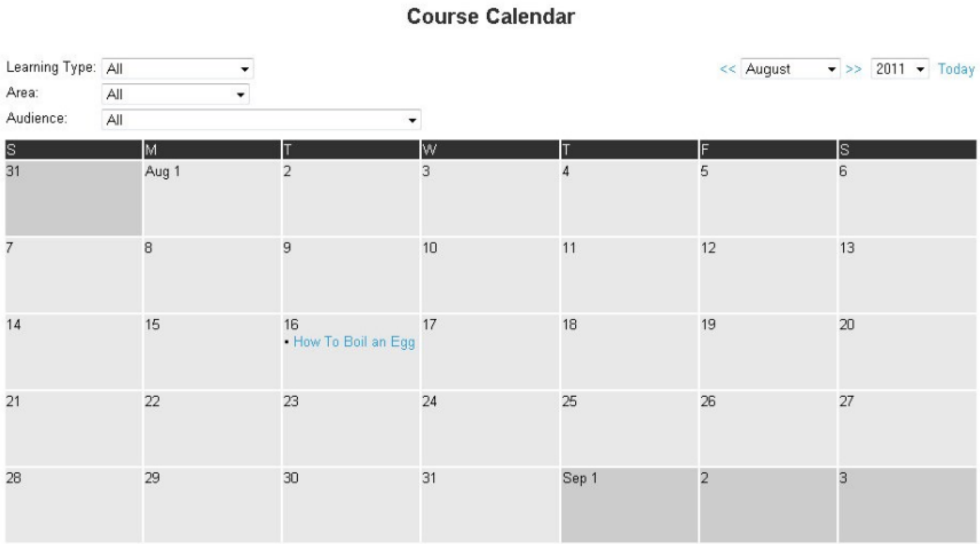
- ***One of the following criteria***
  - This means that viewing permission can be granted to all users belongs to any of the criteria defined in the Add criteria selector.
  - This means that the user must belong to the roles OR organization in order for the user to access the permission to view the report.
- ***Add criteria selector***
  - This allows you to add criteria. To add the criteria, click the selector dropdown button and then select the preferred criteria.

Note: For every selected criterion, a criterion box will be displayed. 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.

Configuring Geographic Regions

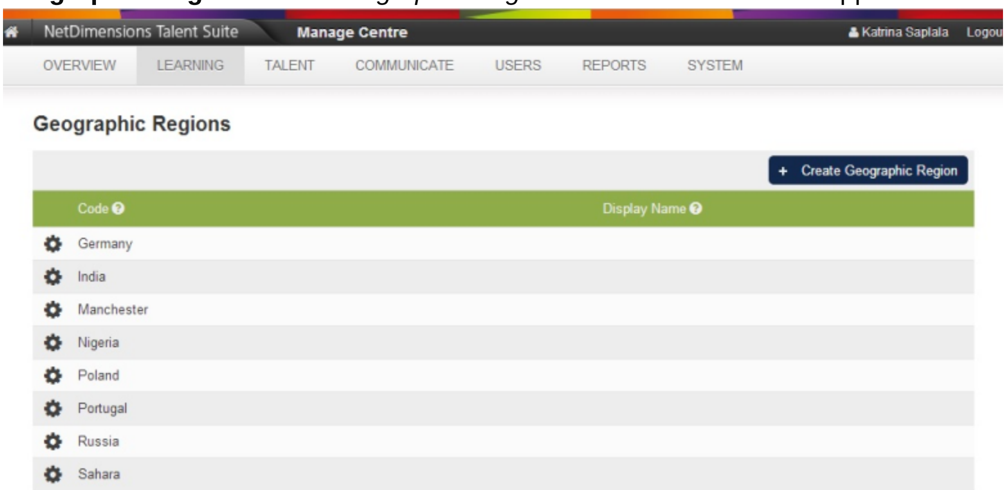
(applies to NetDimensions Talent Suite)

Geographic Regions are used to categorize class locations and thereby provide learners with the ability to scan course schedules in region-specific calendars.



To define geographic regions that can be used as information session properties of various courses, you need to define them the *Catalog Configuration* page.

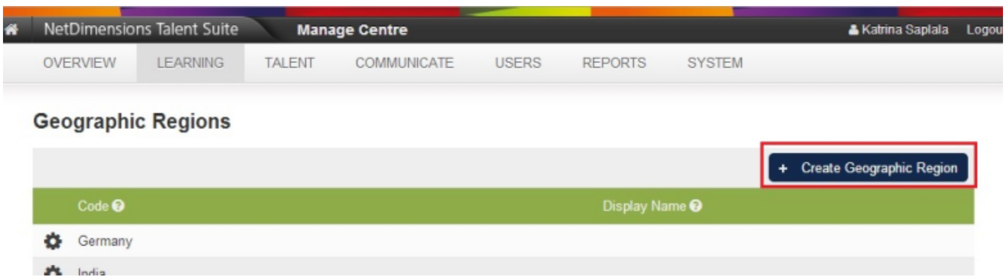
To maintain geographic region listings, click **Manage Center > Learning > Catalog Configuration > Geographic Regions**. The *Geographic Regions Maintenance* screen appears.



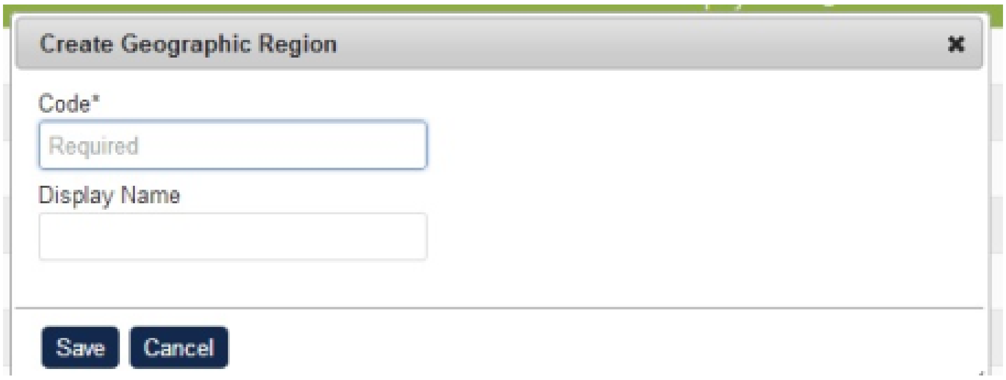
Adding Geographic Region

To add a new Geographic Regions:

1.Click the Create Geographic Region button



2.A pop up box will appear where you can type in the Geographic Region Code and the Display Name

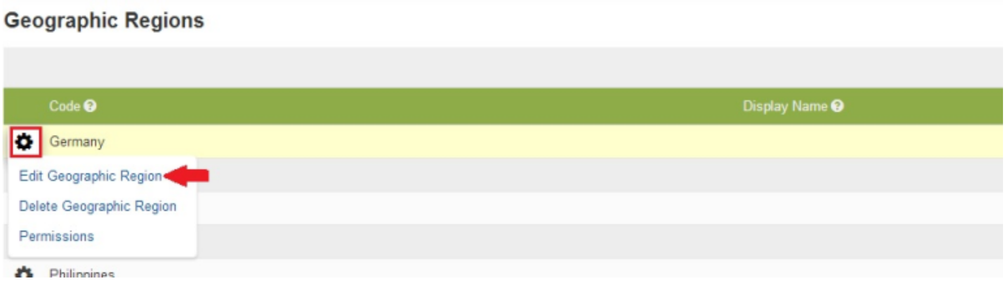


3.Click **Save**. The application returns an acknowledgement.

Updating Geographic Region

To edit a Geographic Regions listing:

1.Click the gear icon of the region you wish to edit



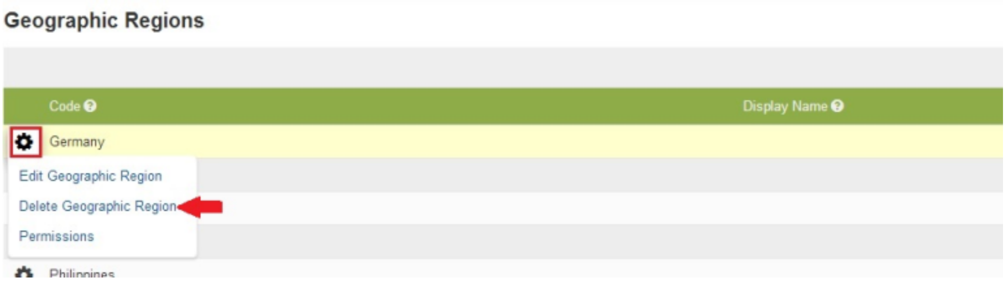
2.The edit box will appear, make your changes accordingly and click **Save**

3.A confirmation dialog box appears.

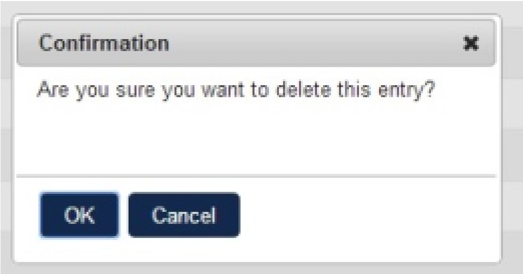
Deleting Geographic Region

To remove a Geographic Regions listing:

1.Click the gear icon of the region you wish to delete



2.Click **Delete Geographic Region**. A confirmation dialog box appears.

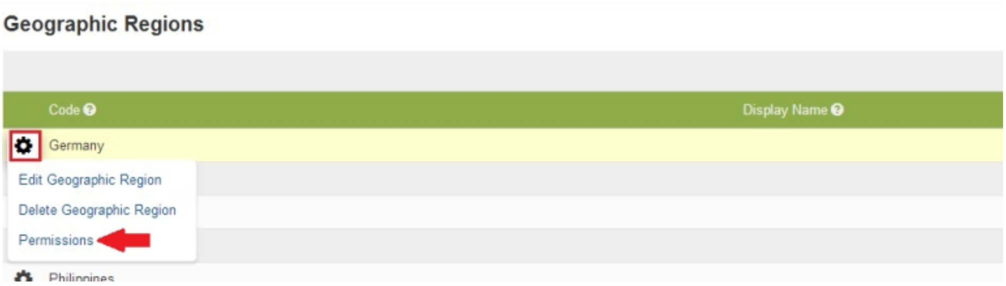


3.Click **OK**. The application returns an acknowledgement.

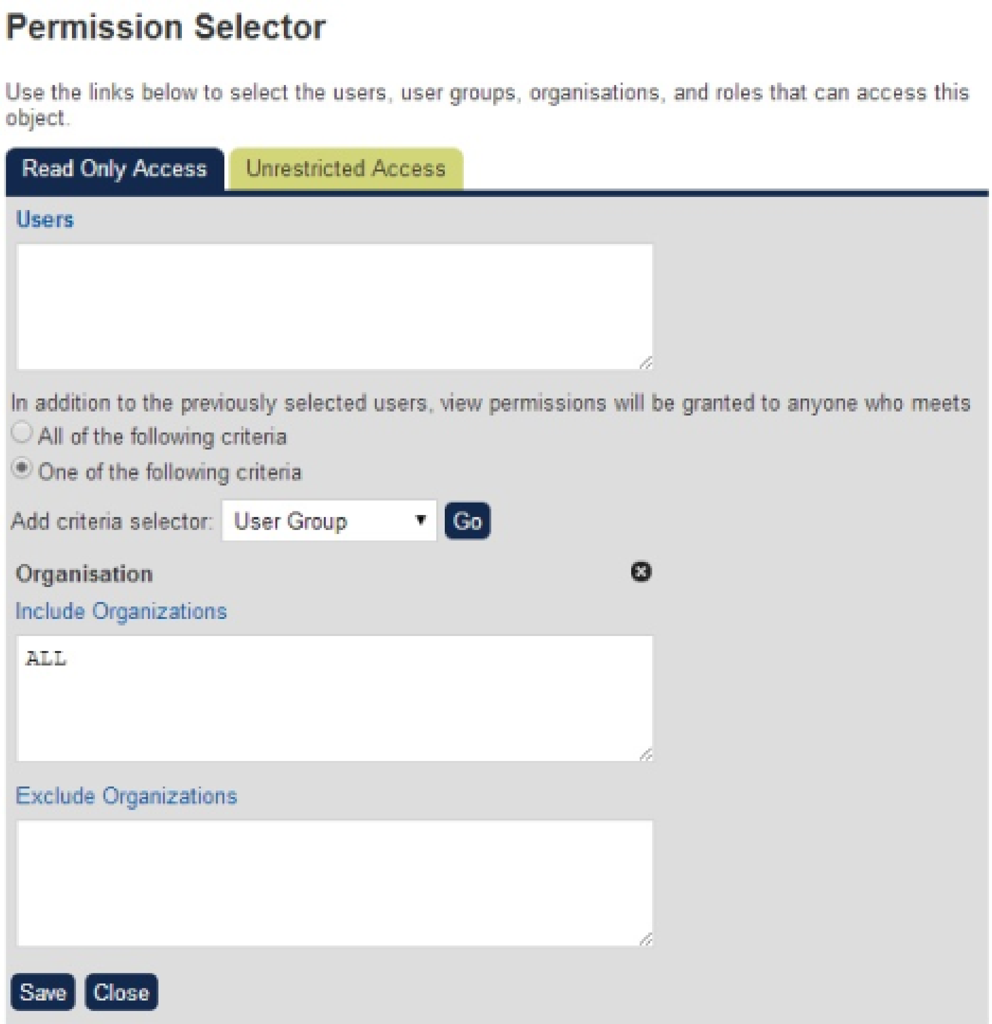
Permissions on Geographic Region

Permissions checking have been added to Geographic Region. User actions will be restricted by privileges granted on Geographic Region

- ***Read Permission***
  - View the Geographic Region in Catalog Configuration > Geographic Regions
  - Use the Region in the following area:
    - Teach > Administrative Access
    - Catalog Editor
    - Course CSV Loader
    - Course Calendar
- ***Unrestricted Permission***
  - Edit or delete the Geographic Region in Catalog Configuration > Geographic Regions
  - Update permissions on the Geographic Region



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



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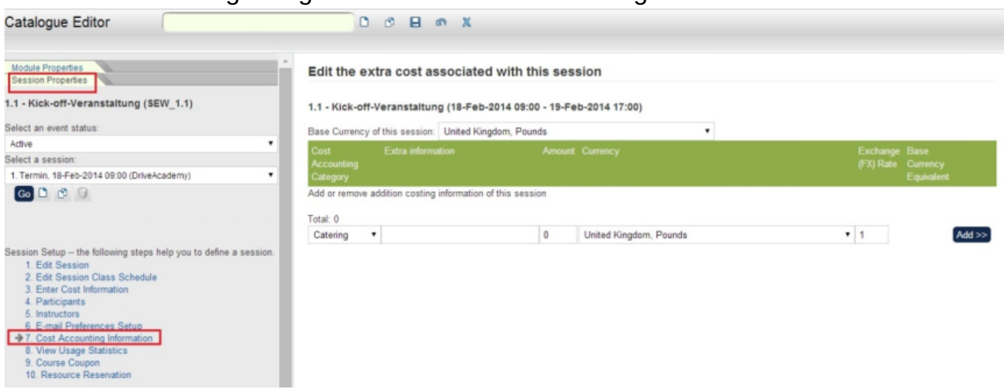
Useful Info: On upgrade, write permissions on existing Geographic Region will be granted to Root Organisation, i.e., all users.

Configuring Cost Accounting

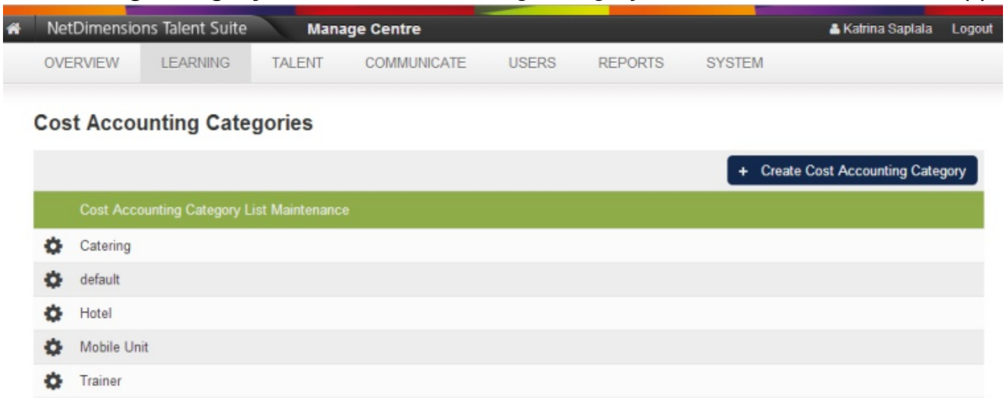
(applies to NetDimensions Performance NetDimensions Learning NetDimensions eLearning)

The cost accounting feature allows you to configure additional costs for a course, which are not in the listed price. These are added in the course's session properties and the additional costs are configured as additional costing categories under Cost Accounting.



You may use these additional cost categories to compensate for added expenses of conducting courses in particular locations. For example, you can configure the pricing of a course session conducted in one location at a price that differs for the course of a session of the same course conducted elsewhere.

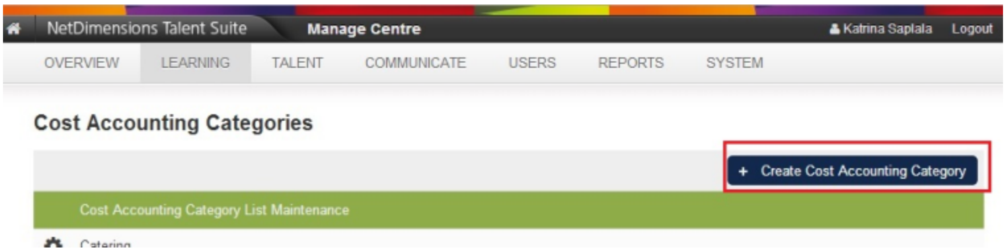
To maintain cost accounting categories click **Manage Center > Learning > Payment Manager > Cost Accounting Category**. The Cost Accounting *Category List Maintenance* screen appears.



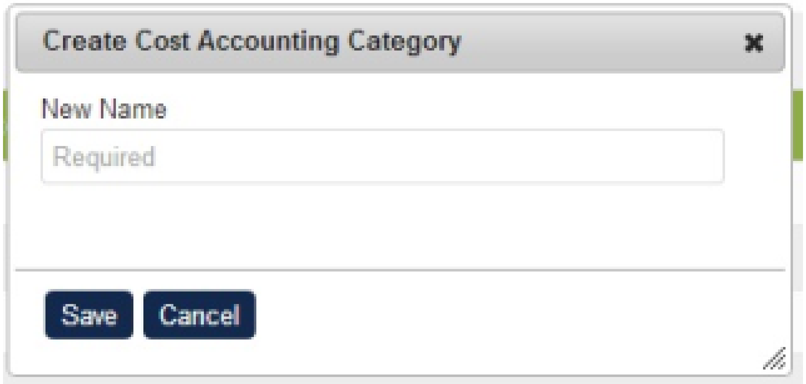
Adding Cost Accounting Categories

To add new Cost Accounting categories:

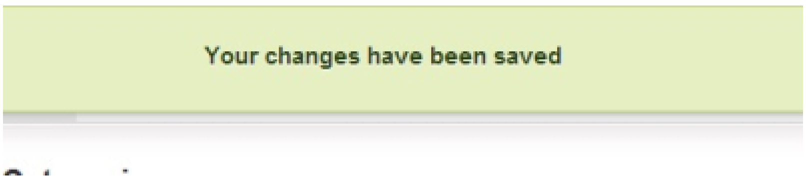
1.Click the **Create Cost Accounting Category** button



2.A pop up box will appear where you can type in the category name.



3.Click **Save**. The application returns an acknowledgement.



Updating Cost Accounting Categories

To edit a Cost Accounting Category:

1.Click the gear icon of the category you wish to edit

2.The edit box will appear, make your changes accordingly and click **Save**

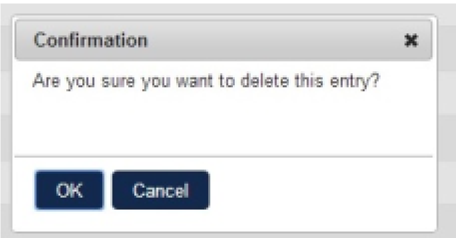
3.A confirmation dialog box appears.

Deleting Cost Accounting Categories

To remove a Cost Accounting Category:

1.Click the gear icon of the category you wish to delete

2.Click **Delete Cost Accounting Category**. A confirmation dialog box appears.



3.Click **OK**. The application returns an acknowledgement.

Payment Plans and Online Payment

applies to NetDimensions Performance NetDimensions Learning NetDimensions eLearning)

The NetDimensions Talent Suite allows learners to pay for courses, learning objects, etc. online. Pre-defined payment plans are associated with particular organizations through the User Editor and specify, among other things, allowances for online payment, usage and/or date-limited discounts, provisions for pre-payments (either through the use of currency, coupons or 'tokens'), discount thresholds or expiration. Payment plans apply to all courses with specified prices. The online payment option can be used in conjunction with payment plans thereby allowing for the implementation of different pricing and charging strategies (for example, requiring some users to pay online).

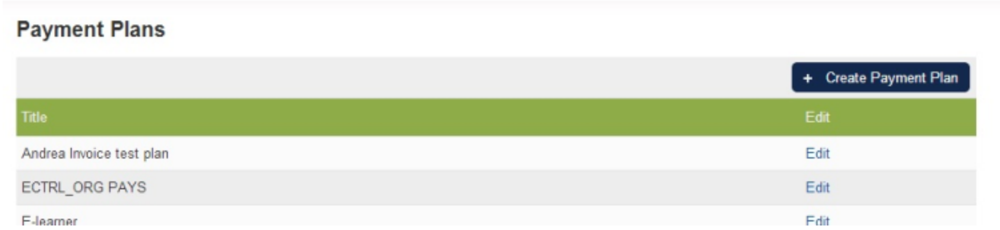
Payment Plans

(applies to NetDimensions Performance NetDimensions Learning NetDimensions eLearning)

Payment plans may be created to specify different charging options for different groups. This offers organizations more flexibility in charging different groups of learners. Please note that online payments must be configured separately. (Refer to the section *"System Configuration to Support Online Payment"*).

Configure and Maintain Payment Plans

To maintain Payment Plans, access the Payment Plans page by clicking **Manage Center > Learning > Payment Manager > Payment Plans**. The Payment Plans screen appears.

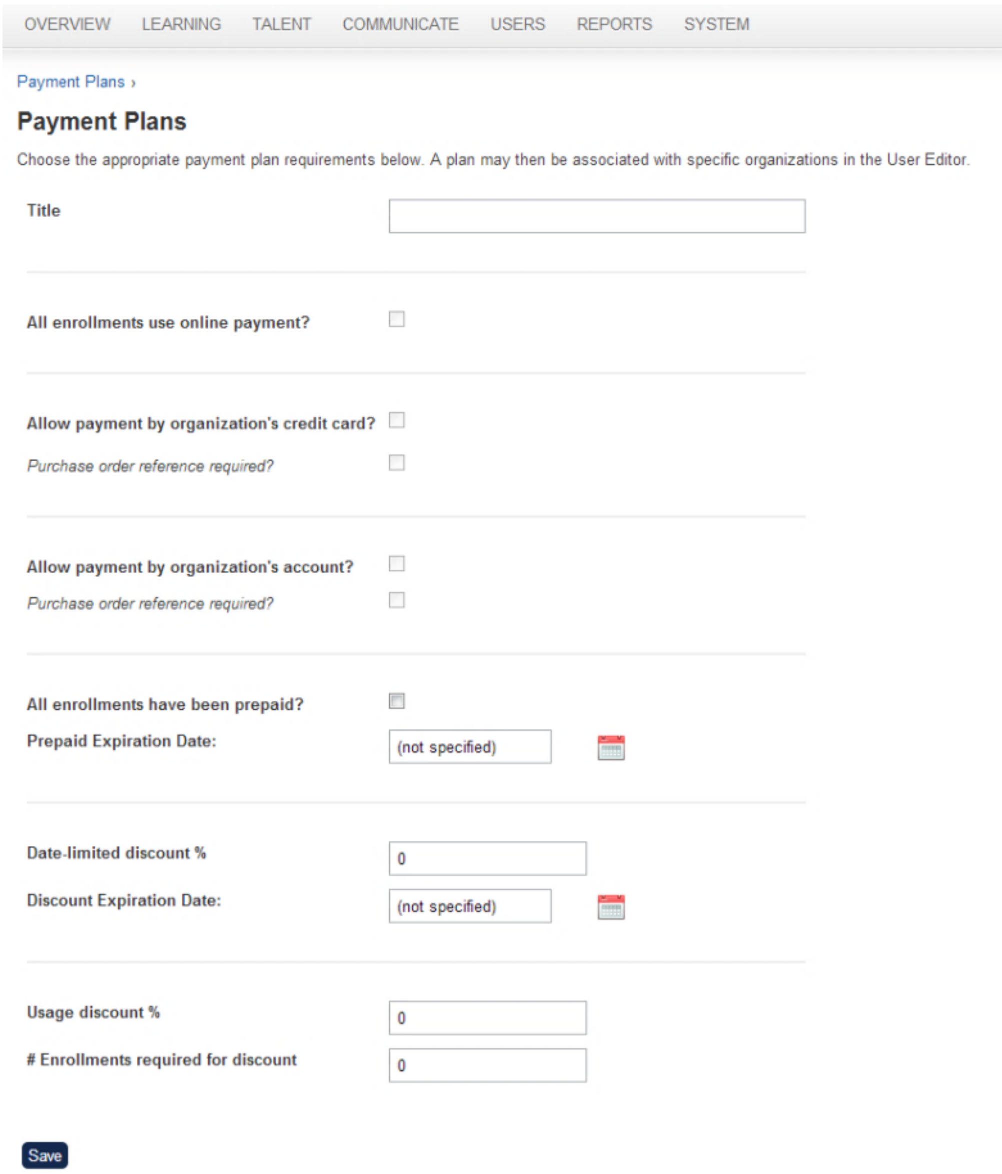


Payment plans apply to all courses with specified prices.

Create a Payment Plan

To create a payment plan:

1.Click **Create Payment Plans button.** The Payment Plans page appears:



2.Enter a name for the payment plan in the *Title* field.

3.Specify support for online payment.

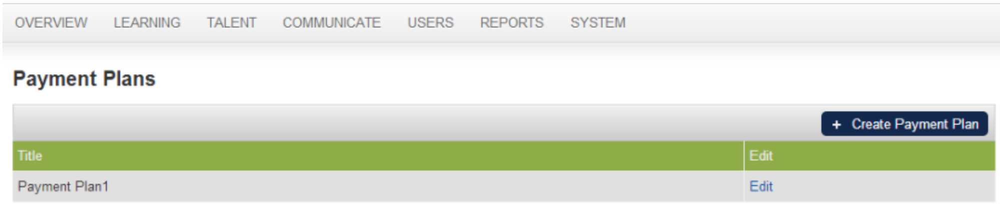
4.Specify whether the enrollments are prepaid and if prepayments are allowed additionally:

5.Enter the expiration date for the prepayment if applicable.

6.Enter the prepayment amount in currency or tokens.

- If the plan allows date limited discounts:
  - Enter the discount percentage.
  - Specify the expiration date if applicable.
- If the plan allows usage-based discounts:
  - Enter the discount percentage.
  - Specify the discount threshold – that is, the number of enrollments required before the discount applies.

7.Click **Save**. The *Payment Plan* page appears.

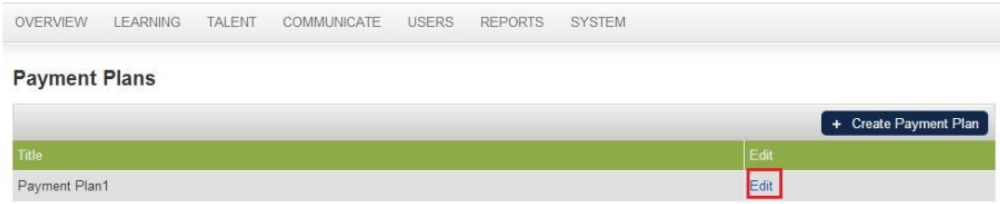


More technical information regarding payment plans can be found at the end of this subsection. From here you should proceed with the amendment of catalog entries to support online payment.

Maintaining a Payment Plan

To maintain or delete a payment plan:

1.Click on the **Edit** hyperlink by the desired Payment Plan.



2.The *Payment Plans* page appears. Enter the new name for the payment plan in the *Title* field in the second Payment Plans page that appears.

3.Specify support for online payment.

4.Specify whether the enrollments are prepaid and if prepayments are allowed additionally:

- Enter the expiration date for the prepayment if applicable.
- Enter the prepayment amount in currency or tokens.
  - If the plan allows date limited discounts
    - Enter the discount percentage.
    - Specify the expiration date if applicable.
  - If the plan allows usage-based discounts:
    - Enter the discount percentage.
    - Specify the discount threshold – that is, the number of enrollments required before the discount applies.

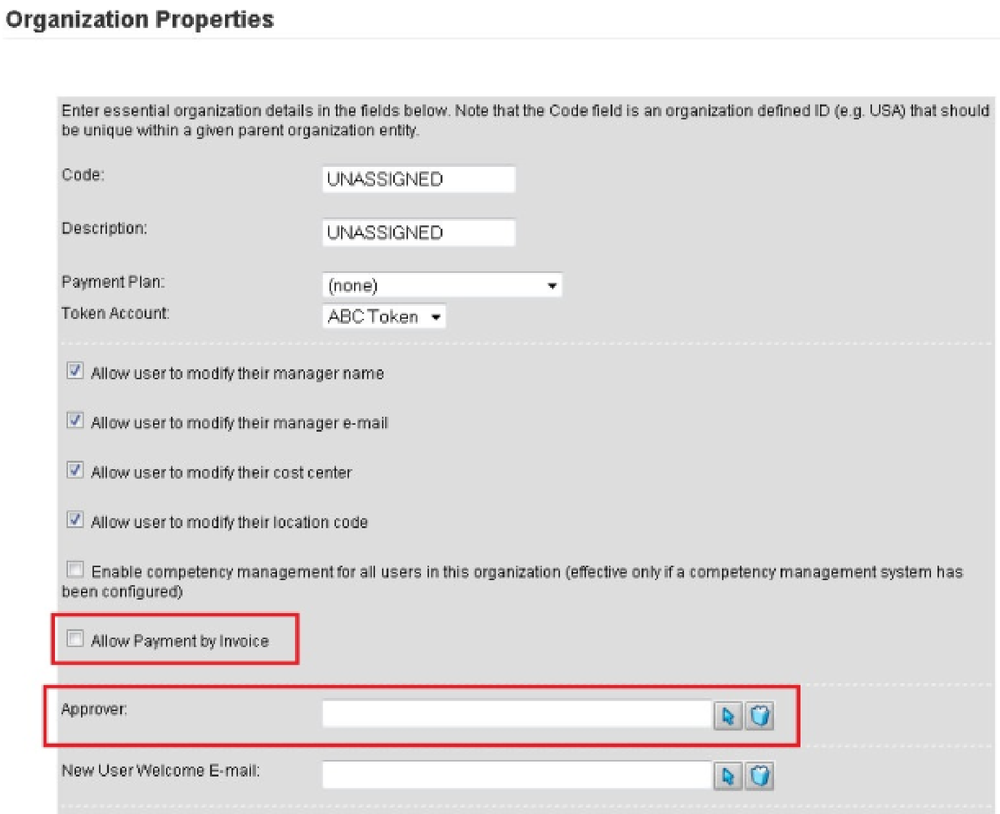
5.Click:

- **Save** to save the changes
- **Delete** to delete the plan.

Company Payment Options

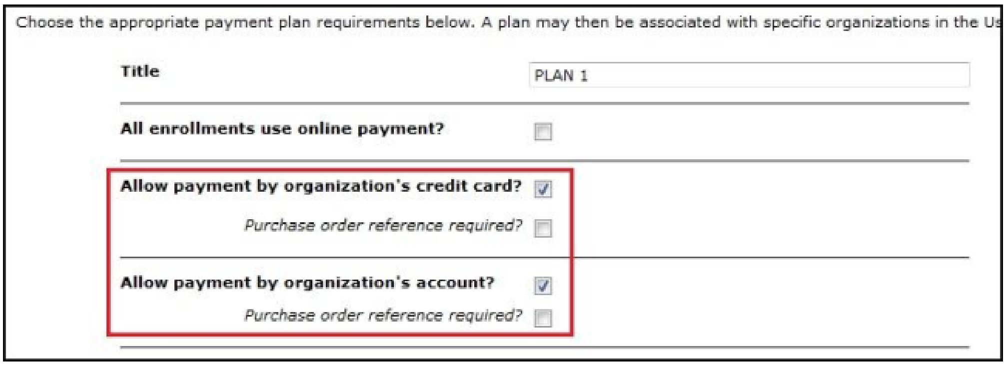
This option introduces an approver at the organization level who can approve the learner's enrollments by credit card or by invoice. It possible to set up an organization such that there is an organization approver. When a learner attempts to enroll into a course, the organization approver can pay for the enrollment either by credit card or by invoice, i.e. by entering a purchase order reference code.

To allow payment by invoice for an organization, click the checkbox by the **Allow Payment by Invoice** field.



The organization approver can also be set on the same page. Note that there is a limitation where the organization cannot be the ROOT organization.
For the payment plan attached to the organization, there are two new options:

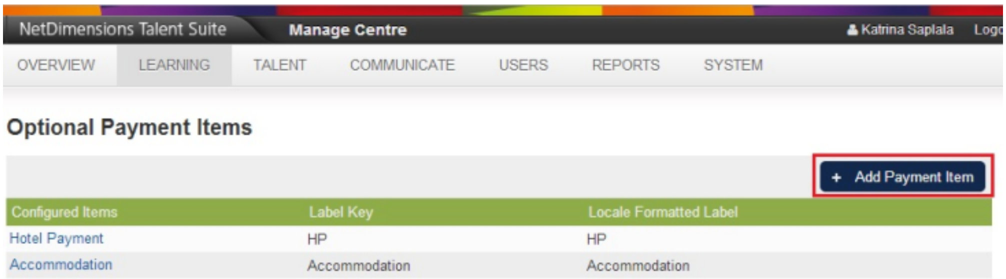
1. Allow Payment by organization's credit card
2. Allow payment by organizations account



Optional Payment Items

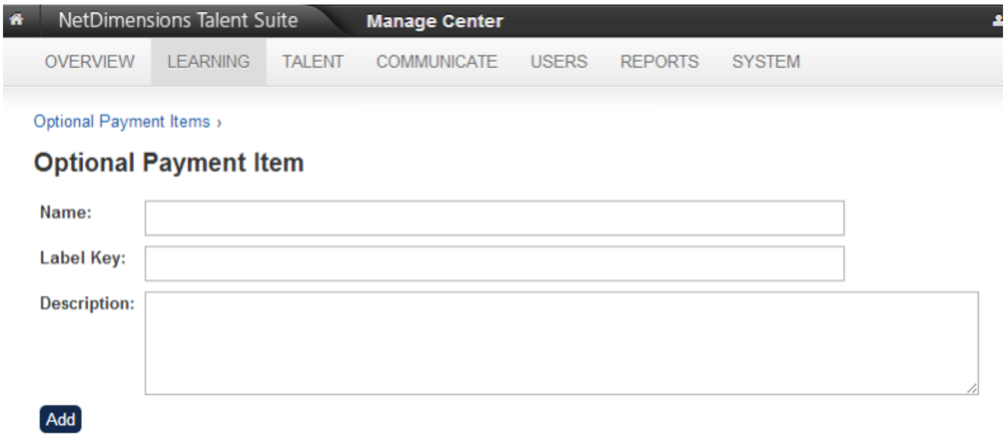
It is possible to configure items that can be optionally purchased by learners when they are buying a course. This is useful when there are generic categories of items (e.g. CD, Handbook, Starter Pack, Accommodation) that are available across a number of courses. The cost of the items can be configured at a module or session level so each course can have its own pricing and the item label can also be localized and displayed in the language of the logged in user (providing translations have been made available in the relevant properties files).

To access optional payment items, access the Optional Payment Items page by clicking **Manage Center > Learning > Payment Manager > Optional Payment Items**. The Optional Payment Items screen appears.



From here, you can create items for purchase by entering the Name of the item:

1.Click **Add**. The page refreshes.



2.Enter the relevant details.

3.Click **Add**. The screen refreshes with the name of the item.

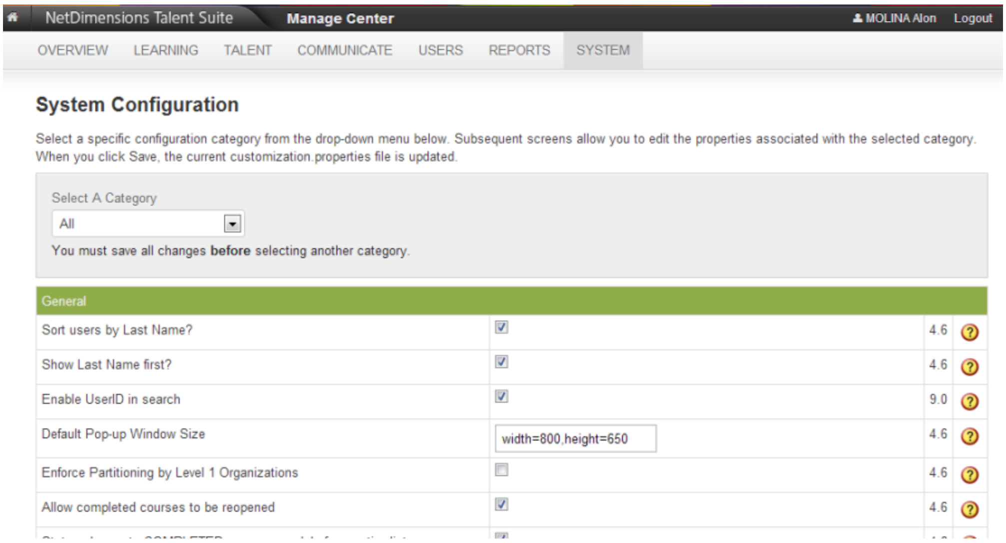
- You can also enter the translation key if you want the item to be displayed in other languages (if no translation key has been provided, the value provided for "Name" will be used).
- Once items have been configured, they will be seen when editing course "Cost" Information in the Catalog Editor.
- Course administrators may enable the checkboxes of the items that they would like to offer for the course and enter the cost details. Each item can have a cost type of "Per Unit", "% of Course Cost", or "Per Night of Course".

System Configuration to Support Online Payment

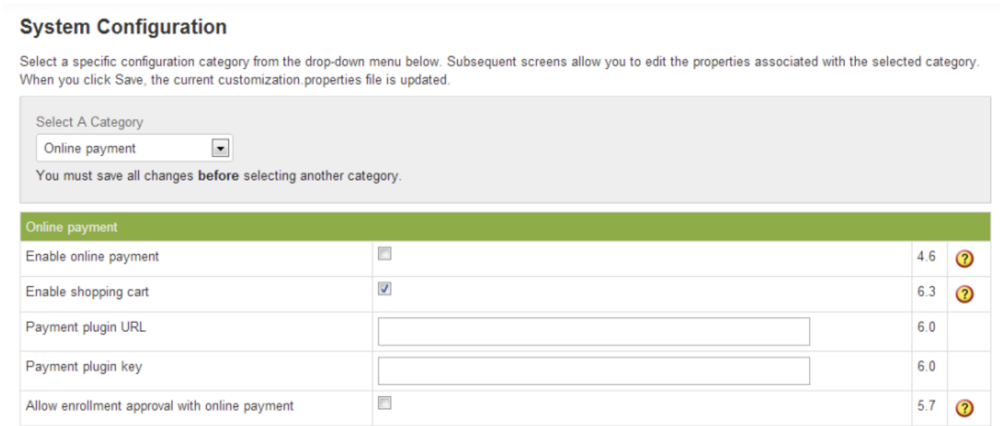
(applies to NetDimensions Performance NetDimensions Learning NetDimensions eLearning)

To configure support for online payment:

1.Access **Manage Center > System > General Settings > System Configuration**. The *System Configuration page* appears.



2.Scroll down to the Online payment section.



3.Enable the online payment option so that the Catalog will display a Shopping Cart tab.

Note: Additional external setting up is required for payment process. You need to consult the relevant technical documentation for the required procedures.

4.You should also enable to prompt the learner to supply additional details including:

- His/her name (for example, as on his/her Credit Card)
- Card security code
- Street address
- Postal code

5.Click **Save**. An acknowledgement appears.

6.Click **Back**.

From here you should proceed with:

- Setting up new or editing existing payment plans
- Amending catalog entries to support online payment
- Setting up payment gateway

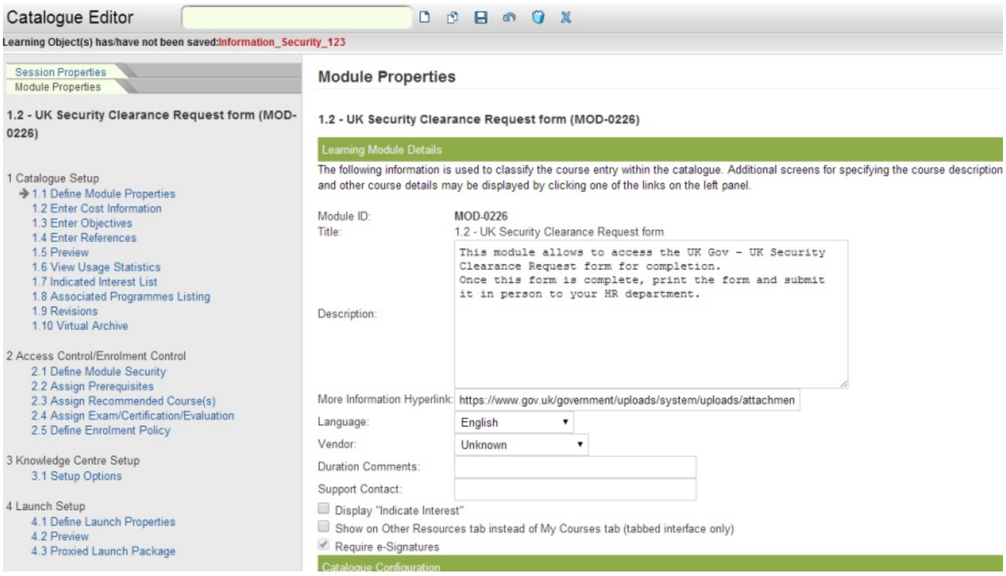
Configuring Online Payments in Learning Modules

(applies to NetDimensions Performance NetDimensions Learning NetDimensions eLearning)

To set up online payment for individual learning objects: (note that not all learning objects can be bought)

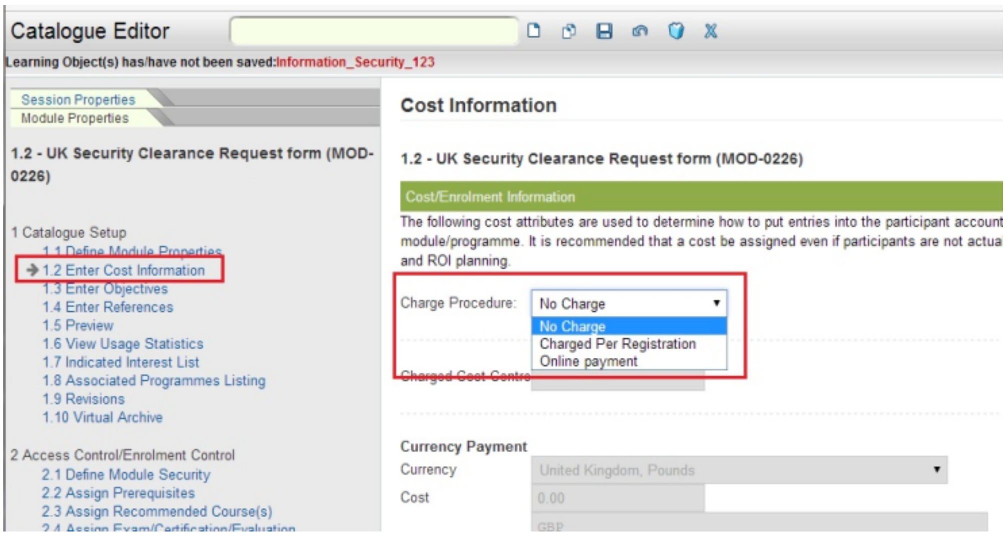
1.Access **Manage Center > Learning > Catalog General Settings > Learning Module**.

2.Locate the desired learning object. The selected learning module appears.



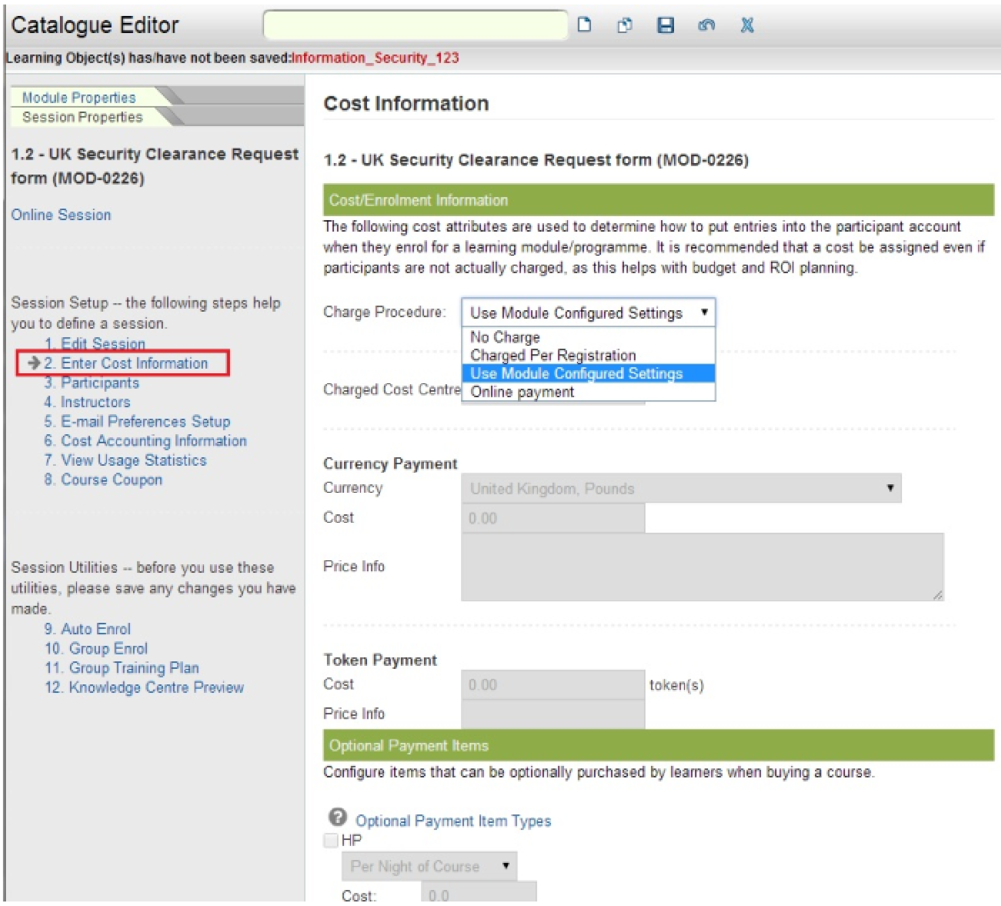
3.In the **Module Properties** tab, click **Enter Cost Information**.

4.Choose **Online Payment** in the drop down menu by the *Charge Procedure* field.



5.Click on the **Session Properties** tab.

6.Click on **Enter Cost Information** in the Catalog Editor.



7.Choose Online Payment in the drop down menu by the *Charge Procedure* field.

8.Enter the information in the *Currency*, *Cost* and *Price* Info fields.

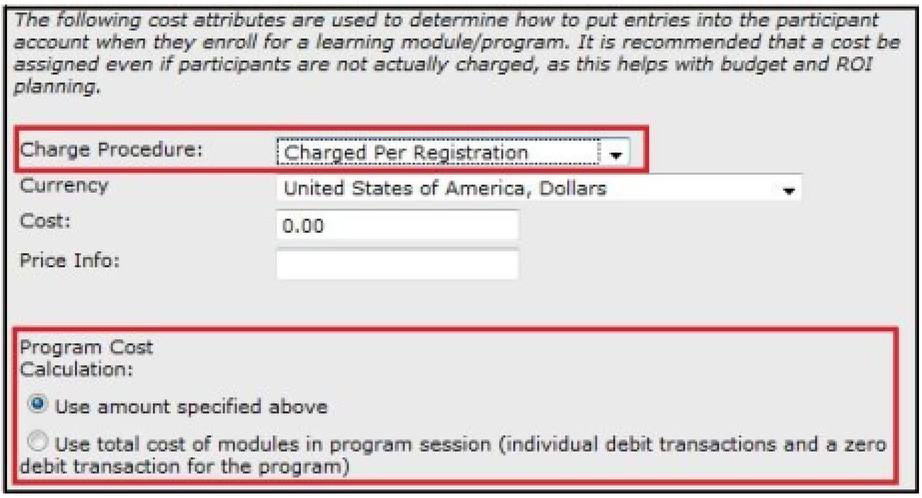
9.Choose the optional payment items that can be optionally purchased by learners when buying a course.

10.Click the **Save** icon on top.

Enhanced Learning Program Billing

Within Enter Cost Information under Session Properties, if the Charge Procedure is set to 'Charged Per Registration' then the Program Cost Calculation setting becomes editable. By default, it is set to *'Use amount specified above*'.

If '*Use total cost of modules in program session'* is selected, then the learner will be charged the individual program modules' cost amount (if set). Each module enrollment will create an account transaction. Additionally, there will be an account transaction for the learning program itself although the associated cost will be zero.



Enrollment Business Logic: Online Payment

The business logic for enrolling courses with online payment works as follows:

- ***For normal users:***

When a user tries to enroll in a course that requires online payment, the course will automatically be added to the shopping cart. The user can checkout at the end and pay for the courses.

- ***For managers trying to assign the course to other users:***

A manager cannot assign a course with payment to other users. In the enrollment screen, the enroll button would be replaced by a text which tells the manager that the course cannot be assigned

- ***For administrators trying to group/auto enroll the course to other users:***

When enrolling a course with payment to other users using this method, the users would get enrolled to the course FREE OF CHARGE. Before enrollment, there would be a pop-up warning which warns the administrator that enrolling with this method would bypass all payment checking business logic.

Note: The logic is only applied to courses where online payment is applied to it. This means, for a learning program not configured to support online payment though its component courses require payment, enrolling in the learning program itself would NOT require payment.

Available Payment Gateways

(applies to NetDimensions Performance NetDimensions Learning NetDimensions eLearning)

The following payment gateways are currently supported:

- VeriSign® Payment Gateway Adapter
- Chase Paymentech
- Asia Pay payment
- PayPal PayflowPro

For the availability of other payment gateways (or how to create an adapter), please contact NetDimensions support.

Payment Plugins

(applies to NetDimensions Talent Suite)

Clients often have very specific needs with regard to payment technology, and it is clearly not feasible for the Talent Suite application to directly support every available payment gateway. Therefore, the application supports the use of payment plugins. A payment plugin is a software module developed by a third party that integrates a payment gateway that the Talent Suite application does not support directly.

This describes the payment plugin mechanism, which attempts to define a minimally simple mechanism that allows the following to occur:

- The Talent Suite application sends a request to a payment plugin asking it to collect payment for a specified amount (and in a specified currency) related to a specific purchase; and
- The payment plugin sends a response to the Talent Suite application that enables it to verify whether the payment was made or if it was cancelled by the user.

Payment Plugin Configuration

(applies to NetDimensions Talent Suite)

To use a payment plugin you will need to specify a URL and a secret key. To configure these properties, navigate to **Manage > System Administration Manager > System Settings > System Configuration** and examine the Online payment category. You will need to configure the properties listed below.

Name	Explanation
Payment plugin URL	The URL of the page that will accept and handle the payment request parameters, as described above
Payment plugin key	The secret key that will be used to validate the HMAC-MD5 message authentication code, as described above

Note: The properties specified above will not appear if Talent Suite has been configured to use one of its natively-supported payment gateways. To enable payment plugin support, delete or comment out any properties named either payment.adapter or external_payment.adapter in your installation's WEB-INF/conf/ekp.properties file.

Payment Request

(applies to NetDimensions Talent Suite)

The Talent Suite application initiates a payment request by redirecting the user to a preconfigured URL and adding query string parameters as specified below.

Name	Description	Example
amount	The amount of the payment	99.99
currency	The ISO 4217 code for the payment currency	USD
locale	The user's locale	en_US
orderid	A unique identifier for the order/purchase; used to correlate a payment response with a request	12345678

For example, if the preconfigured URL for the payment service was https:// www.example.com/payment handler.cgi then the NTS application might request a payment by redirecting the user to the URL https:/

/www.example.com/paymenthandler.cgi? amount=99.99&currency=USD&locale=en_US&orderid=12345678

Payment Confirmation

(applies to NetDimensions Talent Suite)

If the payment plugin successfully processes the payment, it redirects the user to servlet/ NetDimensions Performance application /orderprocessor and appends the query string parameters specified below.

Name	Description	Example
Ordered	The unique identifier for the order/purchase, as passed in the original payment request	12345678
Sig	A "signature" value that NetDimensions Performance application uses to authenticate the payment response	6f112d34e3b9367789752952 b93f611d

The value of the sig parameter is calculated as follows.

- A signature base string is constructed by URL-encoding the amount, currency and orderid parameters in that order, for example amount=99.99&currency=USD&orderid=12345678.
- A message authentication code is calculated based on the signature base string and a secret key known only to NetDimensions Performance application and the payment service, based on the HMAC-MD5 algorithm.
- The value of the MAC is hex-encoded and sent as the value of the sig parameter along with the orderid parameter.

For example, if the base URL for the NetDimensions Talent Suite application instance was https://www.example.org/NTS/ then the payment plugin might redirect the user to the URL https://www.example.org/nts/servlet/nts/orderprocessor?orderid=12345678&sig=6f112d34e3b9367789752952b93f611d

Since the secret key is known only to NTS application and the payment service, only those systems can generate (and hence validate) a signature for a specific response. The end user cannot modify any details of the response without invalidating the signature. Talent Suite considers the payment to have been made for the specified order if the signature value for the payment response is determined to be valid.

Payment Cancellation

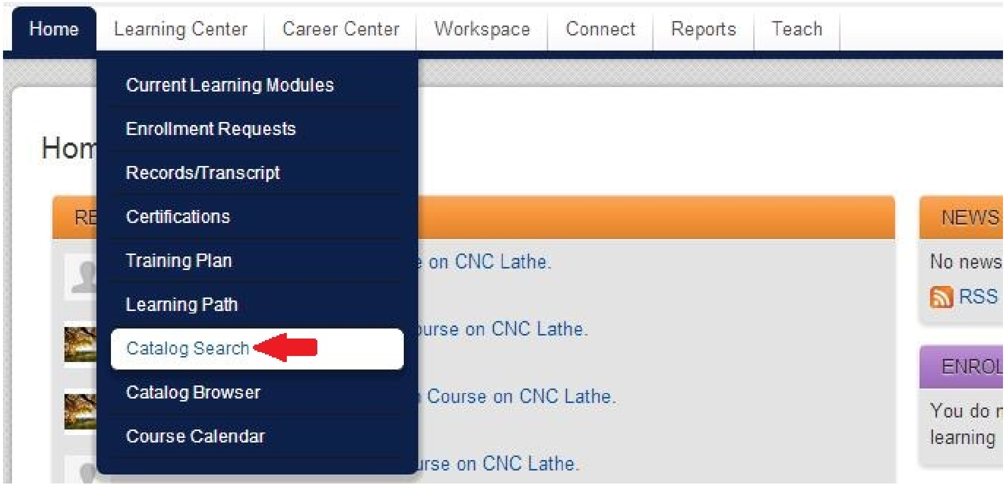
(applies to NetDimensions Talent Suite)

If the user cancels the payment, the payment plugin redirects the user to servlet/nts/ externalpaymentcancel and appends a single parameter, orderid, which is the unique identifier for the order/purchase, as passed in the original payment request. For example, in the case of the payment request shown above, the payment plugin would redirect the user to servlet/nts/externalpaymentcancel?orderid=12345678.

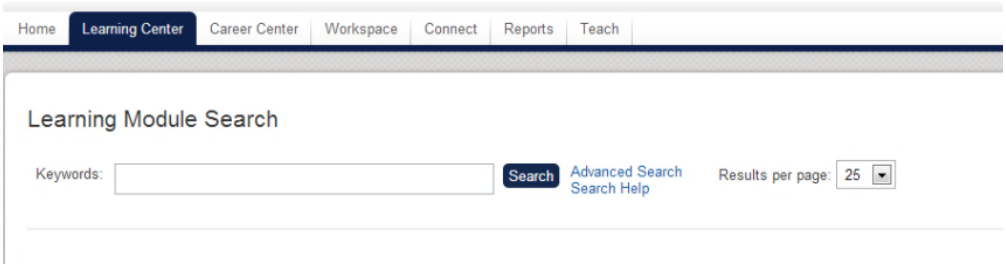
Making Enrollment Payments through a Payment Gateway

(applies to NetDimensions Performance NetDimensions Learning NetDimensions eLearning)

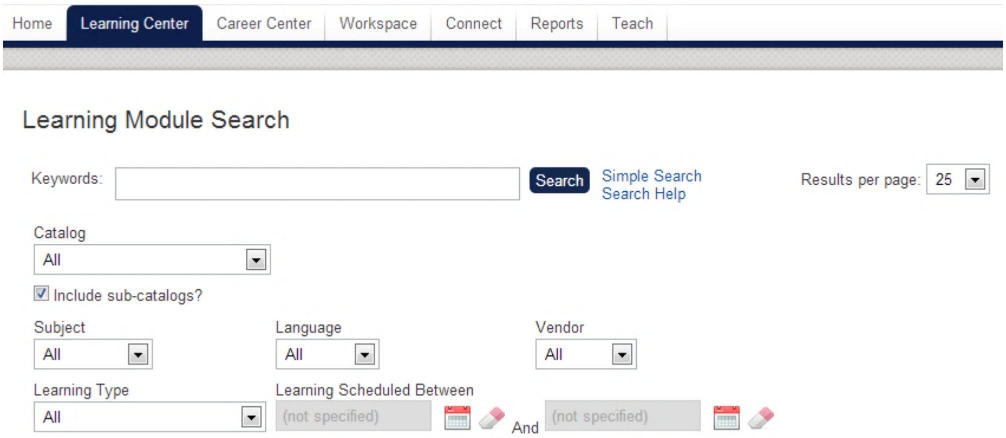
1.Access the **Learning Center** menu. Click on the **Catalog Search**.



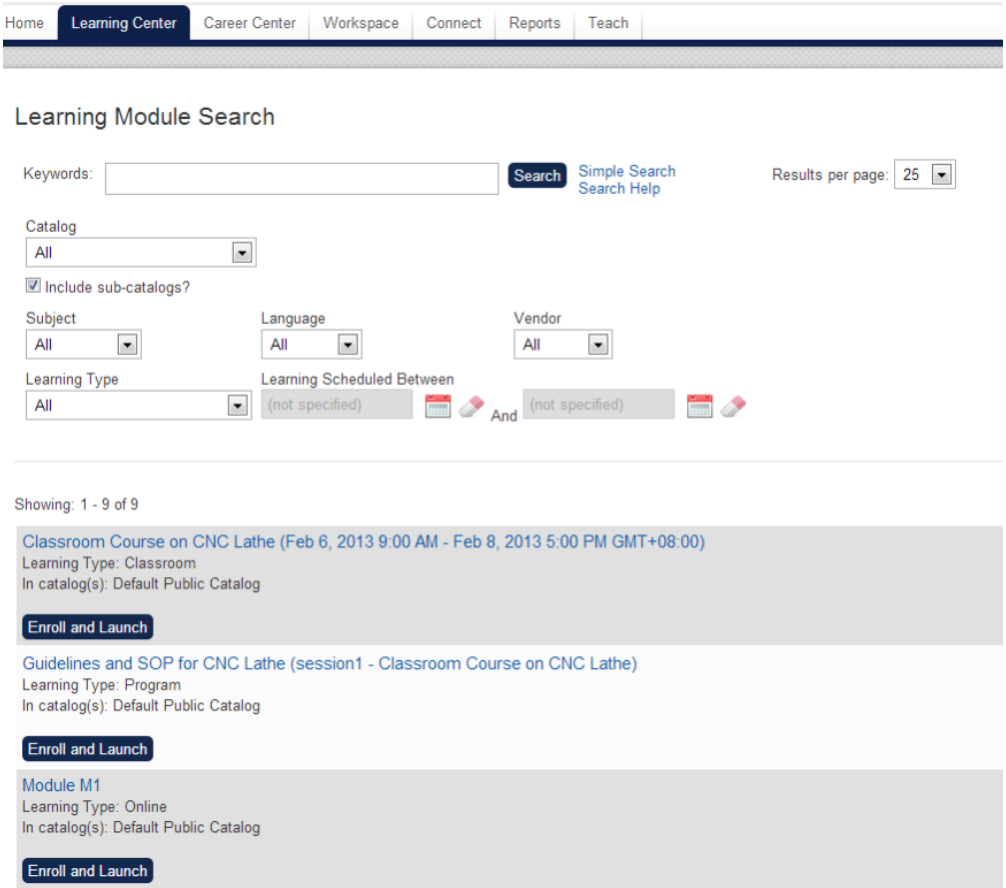
2.Enter the course in the *Keyword(s)* search.....



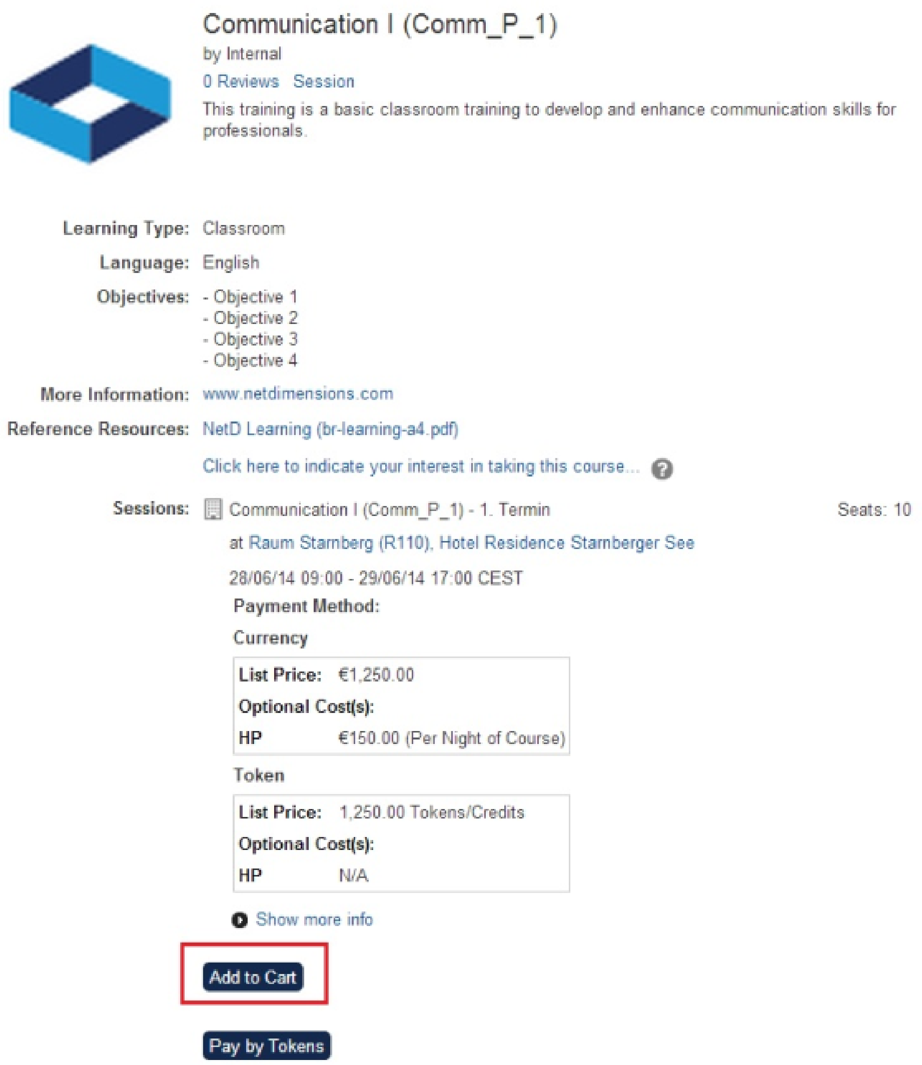
.... or use the **Advance Search** link to select the course.



3.Click **Search**. The page refreshes and displays the search results.



4.From the search result, click the course you want to view. The course details appear in a new window.

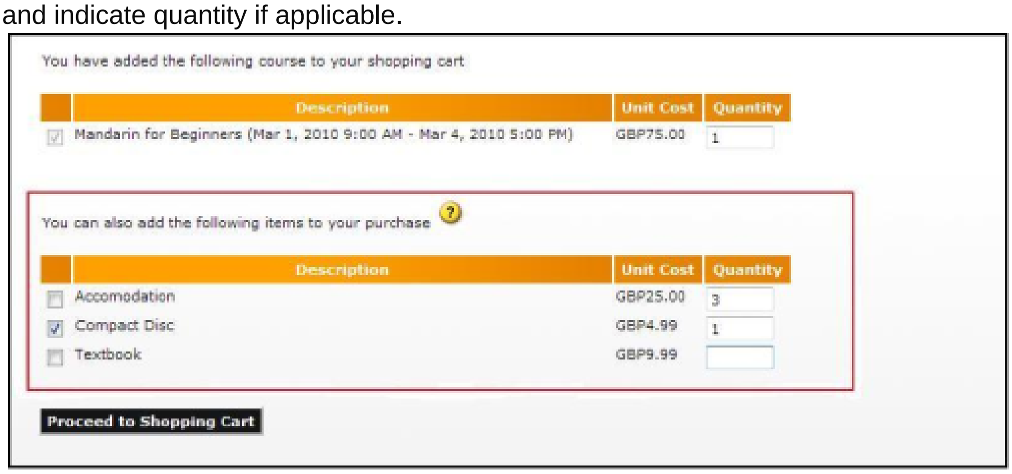


5.Click **Add to Cart**.

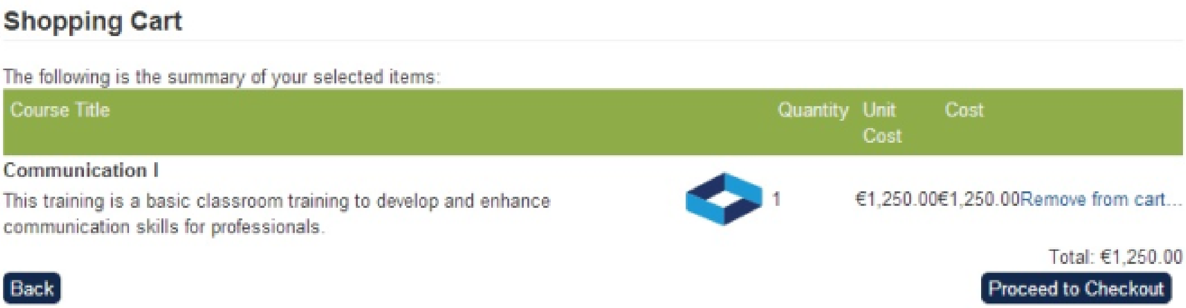
Alternately, the simplified workflow allows you to:

- Click on the **Browse** tab.
- Choose a course from the list that appears.
- Repeat Step 5 for additional courses.

When a learner adds a course to his/her shopping cart, optional items (if configured for the course) will be displayed to the user for selection. The learner must enable the checkboxes of the required items and indicate quantity if applicable.

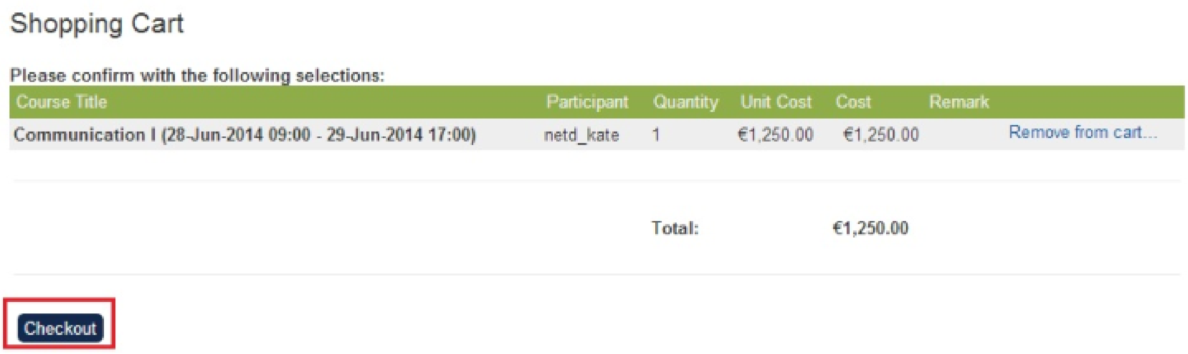


6.Click **Proceed to Shopping Cart**. An *Acknowledgement* screen appears.

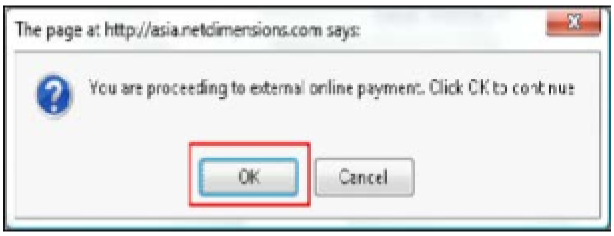


Note: When checking out, optional items will also be detailed in the shopping cart summary. Once the purchase has been made, the optional item will also appear in the user's accounts information in the Accounts tab under User Profile.

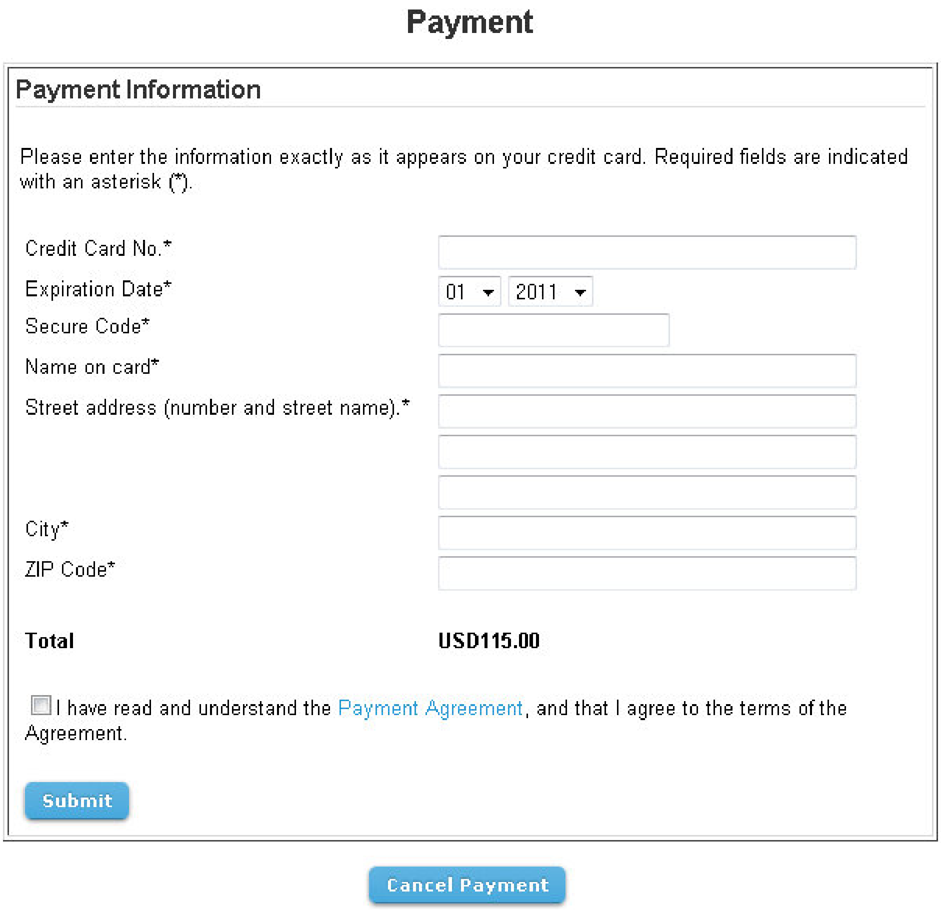
7.Click on the Proceed to Checkout, then click Checkout.



8.Click **Checkout**. A confirmation dialog box appears:



9.Click **OK**. You will be taken to an external payment site where you can pay for this course.

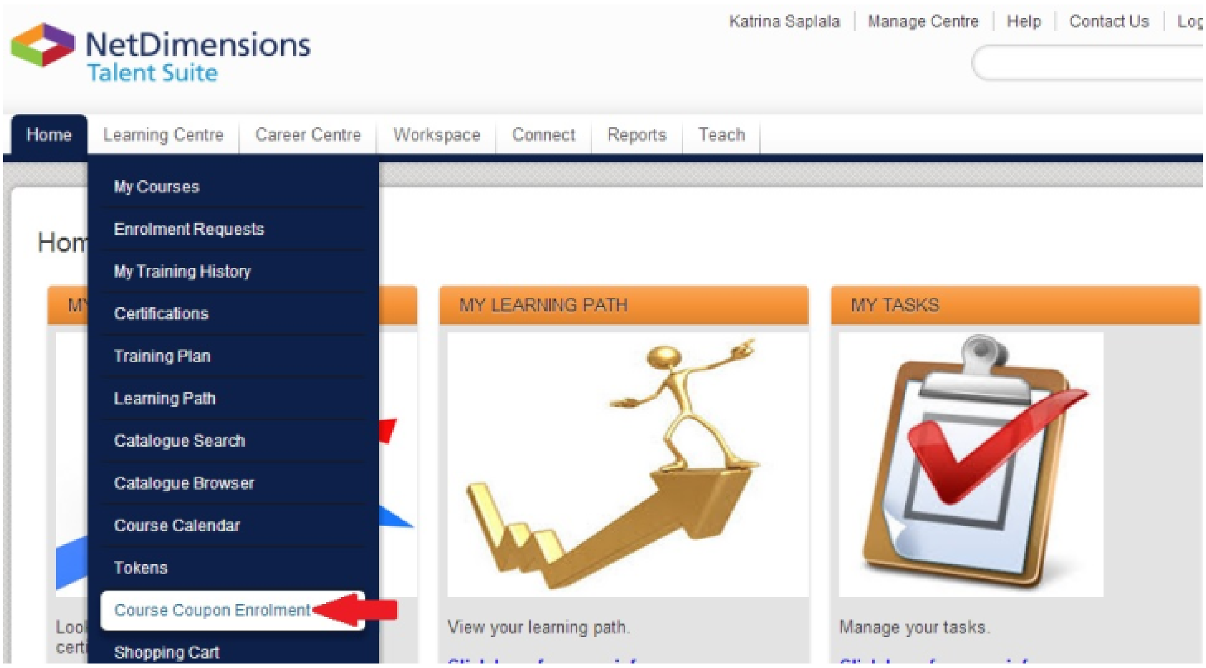


Making Enrollment Payments Using Prepaid Coupons

(applies to NetDimensions Performance NetDimensions Learning NetDimensions eLearning)

The course coupon enrollment scheme provides an alternate way for students to automatically enroll in a designated course. The course owner will generate a set of course coupons during the course setup and distribute them to the specific resellers through the Talent Suite application interface. The coupons will then be redistributed to students by these resellers.

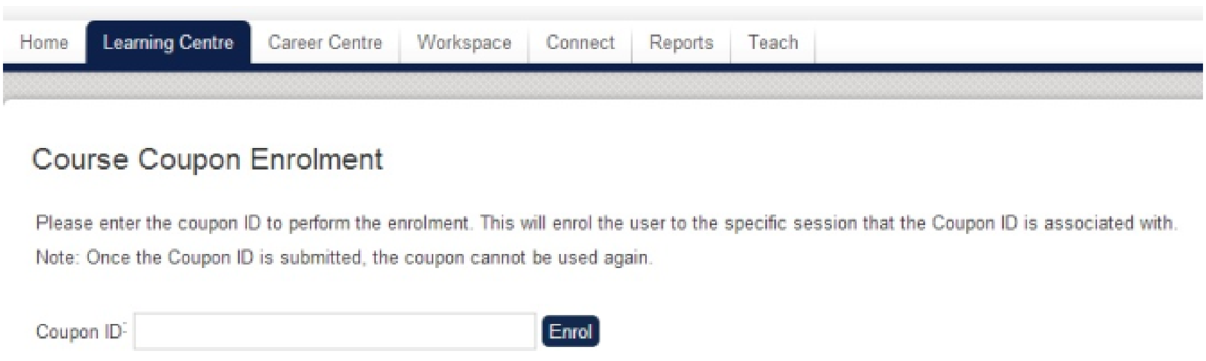
1.The reseller can view assigned coupon in the **Course Coupon Enrollment** option under Learning Center



2.The reseller distributes the coupon ID to the end users by email or other preferred means.

3.Once the end user receives the coupon number, they can then enter it under the Course Coupon Enrollment tab.

4.Enter the Coupon ID in the **Coupon ID** field.



5.Click **Enroll**. The course details appear in a new window.

6.Confirm the enrollment.

Creating Coupons

To create coupons:

1.Access **Manage Center > Learning > Catalog General Settings > Catalog Editor**.

2.Choose a course to create a coupon for.

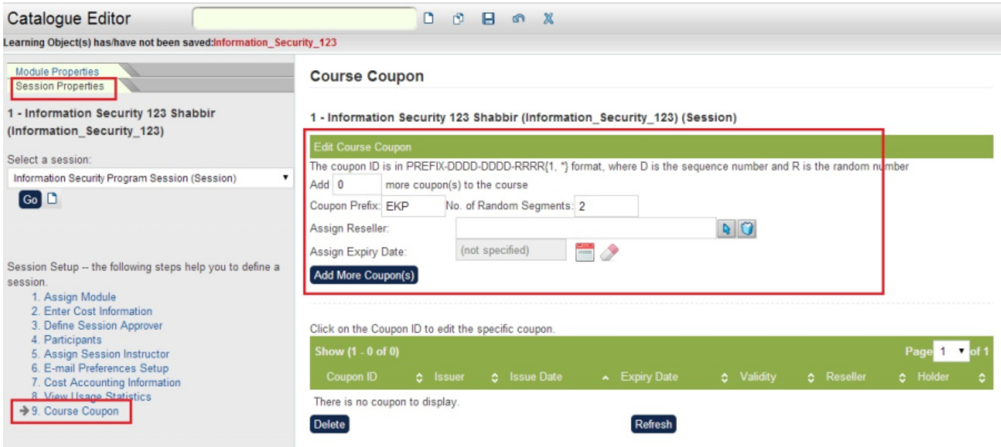
3.Click the **Session Properties** tab.

4.Identify the session to create a coupon for, if applicable.

> **Note:** Step 4 is applicable to courses which have multiple sessions and therefore would fall under different schedules. However, the step would still need to be taken in creating a coupon for online

courses that do not have multiple sessions.

5.Click the **Course Coupon** in the Catalog Editor.



6.Add the number of coupons to create.

7.Enter the **Coupon Prefix**.

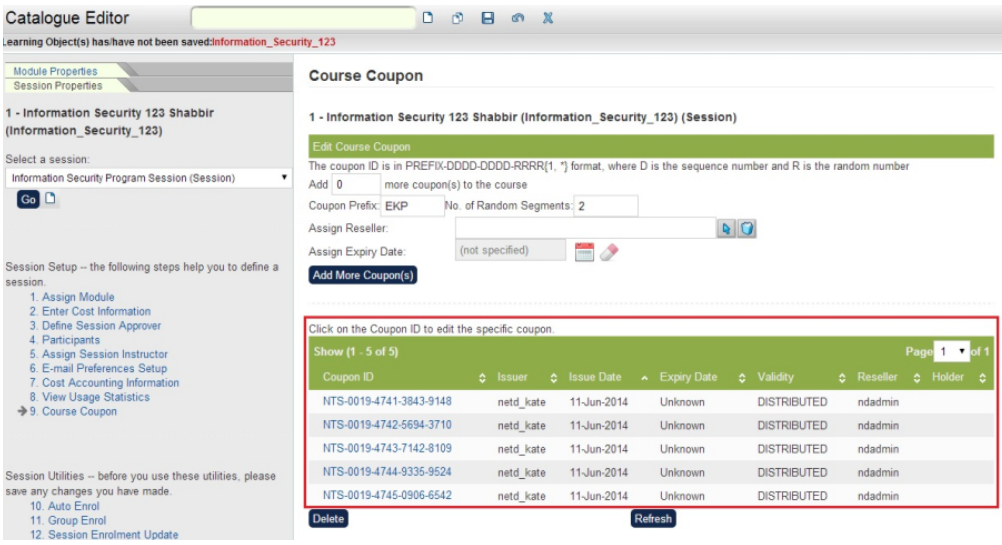
8.Enter the **No. of Random Segments** to make up the coupon id.

9.Assign a reseller who will create coupon(s).

10.Assign an expiry date.

Note: If a date is not specified, the coupon will not expire.

11.Click **Add More Coupons**. The list of Coupon IDs for the course appears.



12.Click the **Save** icon on top. A confirmation dialog box appears.

13.Click **OK**.

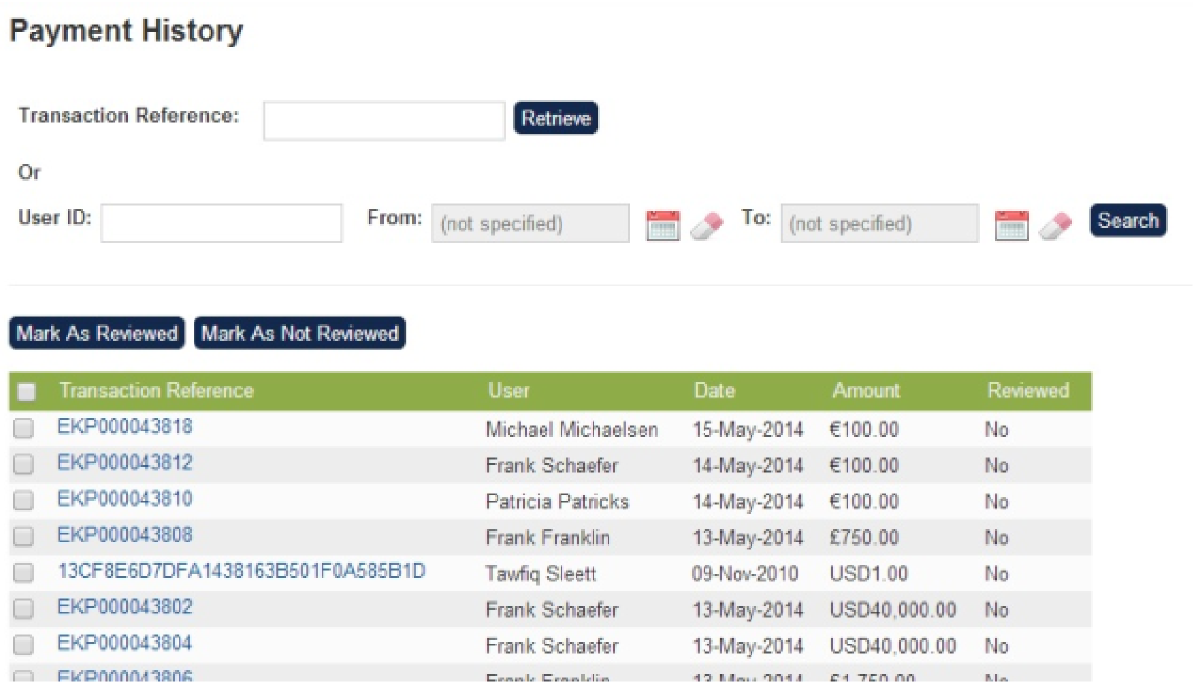
Payment History

(applies to NetDimensions Performance NetDimensions Learning NetDimensions eLearning)

The Payment History is a feature where Administrators can search for and view e-Commerce transactions either based on transaction reference code or by the user Id.
To configure payment and access user payment transaction information, click **Manage Center > Learning > Payment Manager > Payment History**. The page appears.

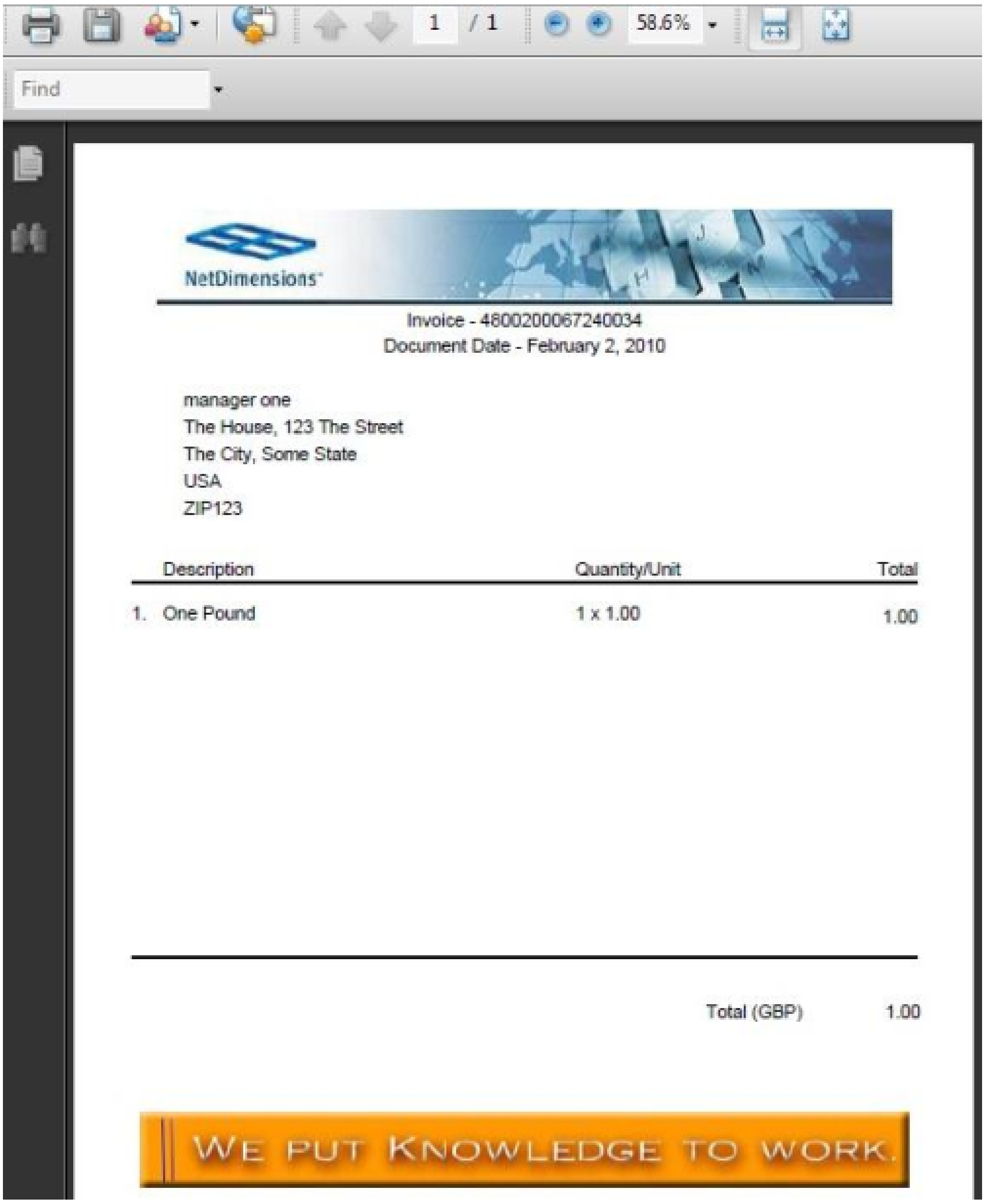
From here you can:

- Select a transaction that will display detailed information about that payment (done via payment gateway, coupons, tokens etc)
- Perform actions such as:
    - Refund the payment
    - Send an invoice
    - Prepare a credit note
    - Apply changes to the status of the enrollment for which this payment was made
    - Print a payment receipt for successful payment transactions



Transaction Reference	User	Date	Amount	Reviewed
EKP000043818	Michael Michaelsen	15-May-2014	€100.00	No
EKP000043812	Frank Schaefer	14-May-2014	€100.00	No
EKP000043810	Patricia Patricks	14-May-2014	€100.00	No
EKP000043808	Frank Franklin	13-May-2014	£750.00	No
13CF8E6D7DFA1438163B501F0A585B1D	Tawfiq Sleett	09-Nov-2010	USD1.00	No
EKP000043802	Frank Schaefer	13-May-2014	USD40,000.00	No
EKP000043804	Frank Schaefer	13-May-2014	USD40,000.00	No

Below is a sample pdf document produced - the header and footer images are located in nd/fresco/images/background/invoiceheader.jpg and nd/fresco/images/background/ invoicefooter.jpg respectively and can be replaced with customized images.


NetDimensions

Invoice - 4800200067240034
Document Date - February 2, 2010

manager one
The House, 123 The Street
The City, Some State
USA
ZIP123

	Description	Quantity/Unit	Total
1.	One Pound	1 x 1.00	1.00

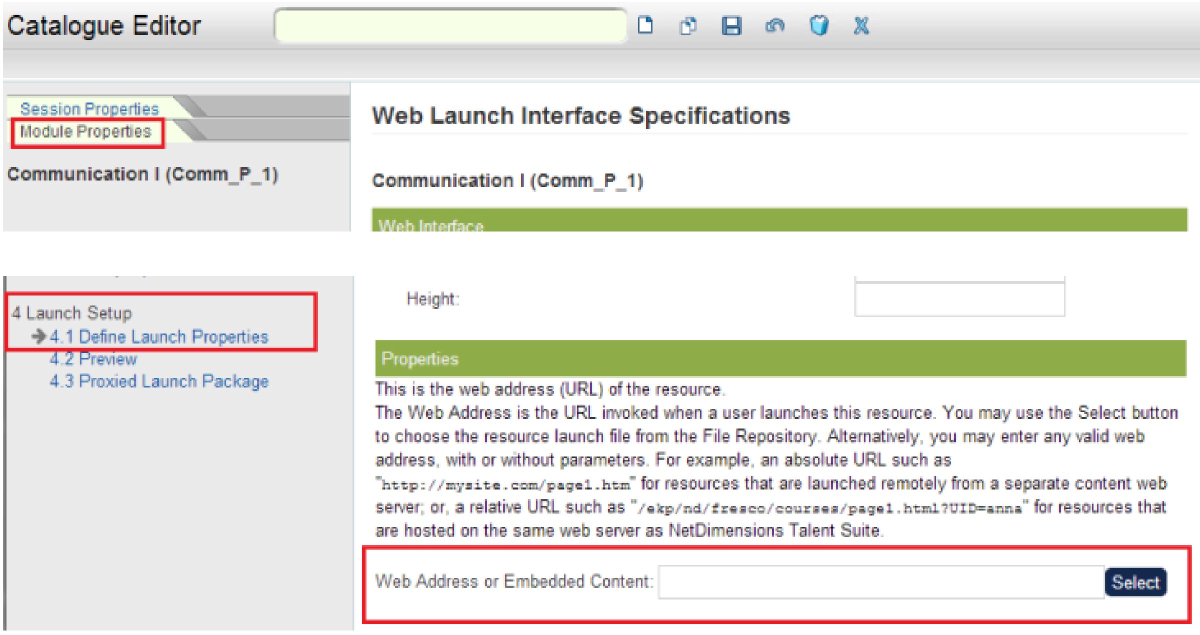
Total (GBP) 1.00

WE PUT KNOWLEDGE TO WORK.

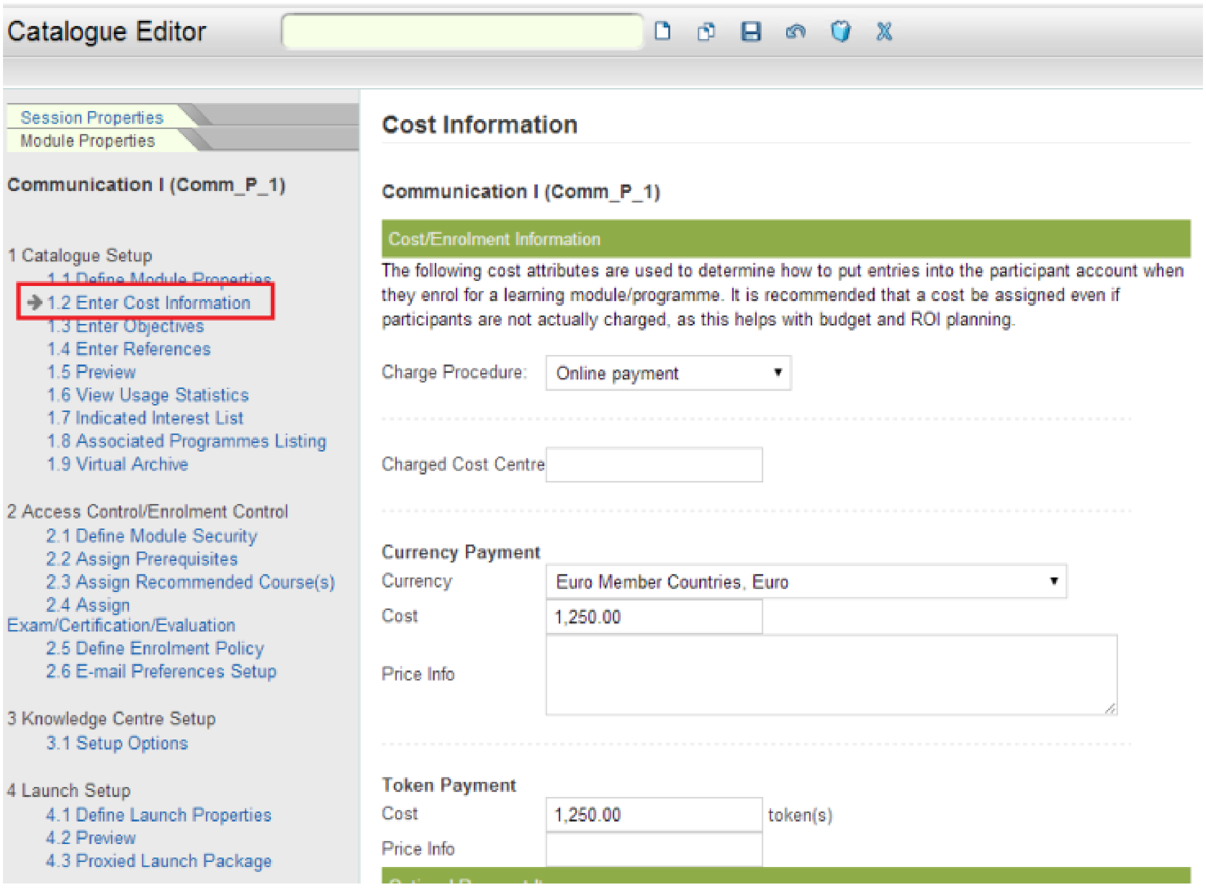
Subscription Enrollment Payment Model

The Subscription Enrollment Payment Model provides Subscription based enrollment.

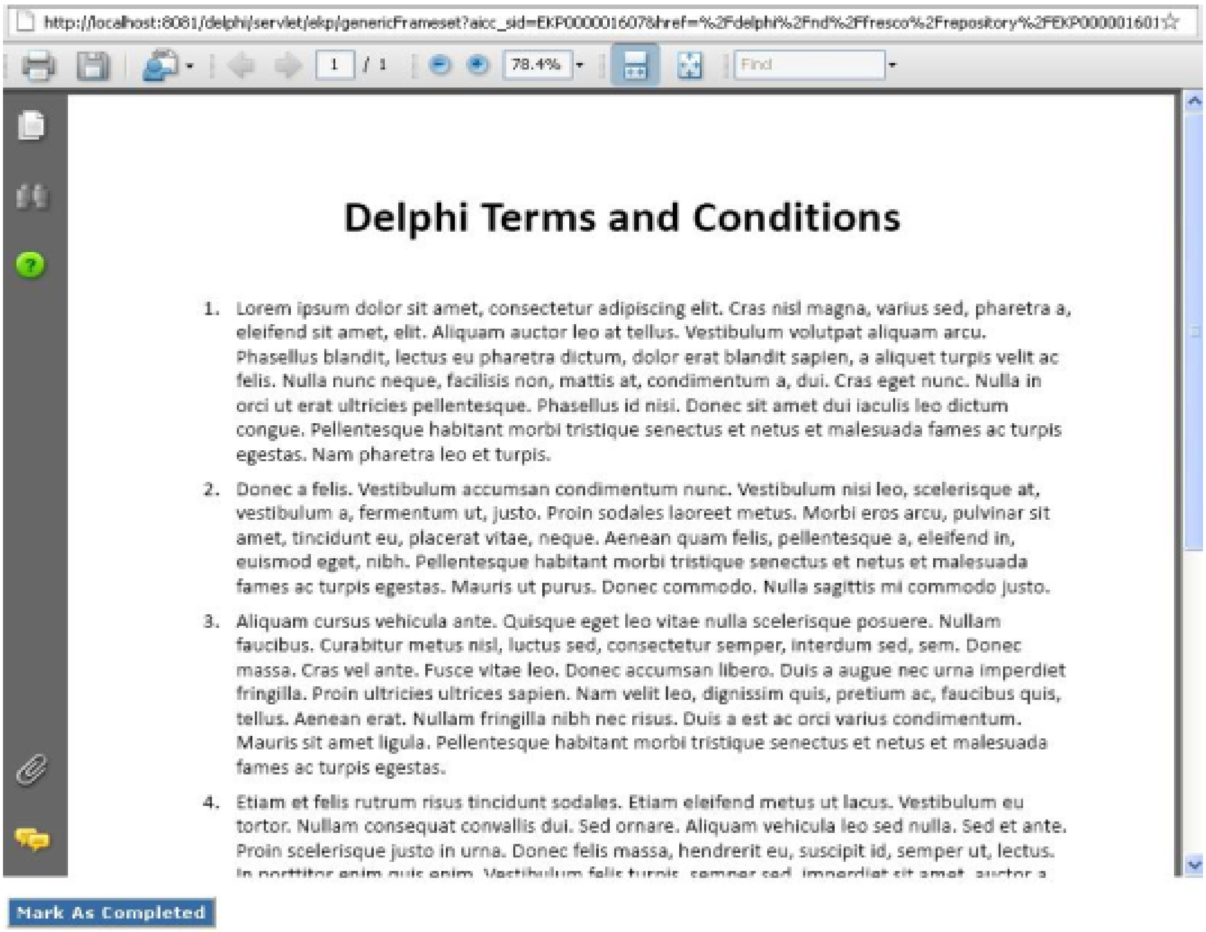
- Assuming the terms and conditions will be in the form of a PDF document, create an online course pointing to the PDF file (should be uploaded to repository)



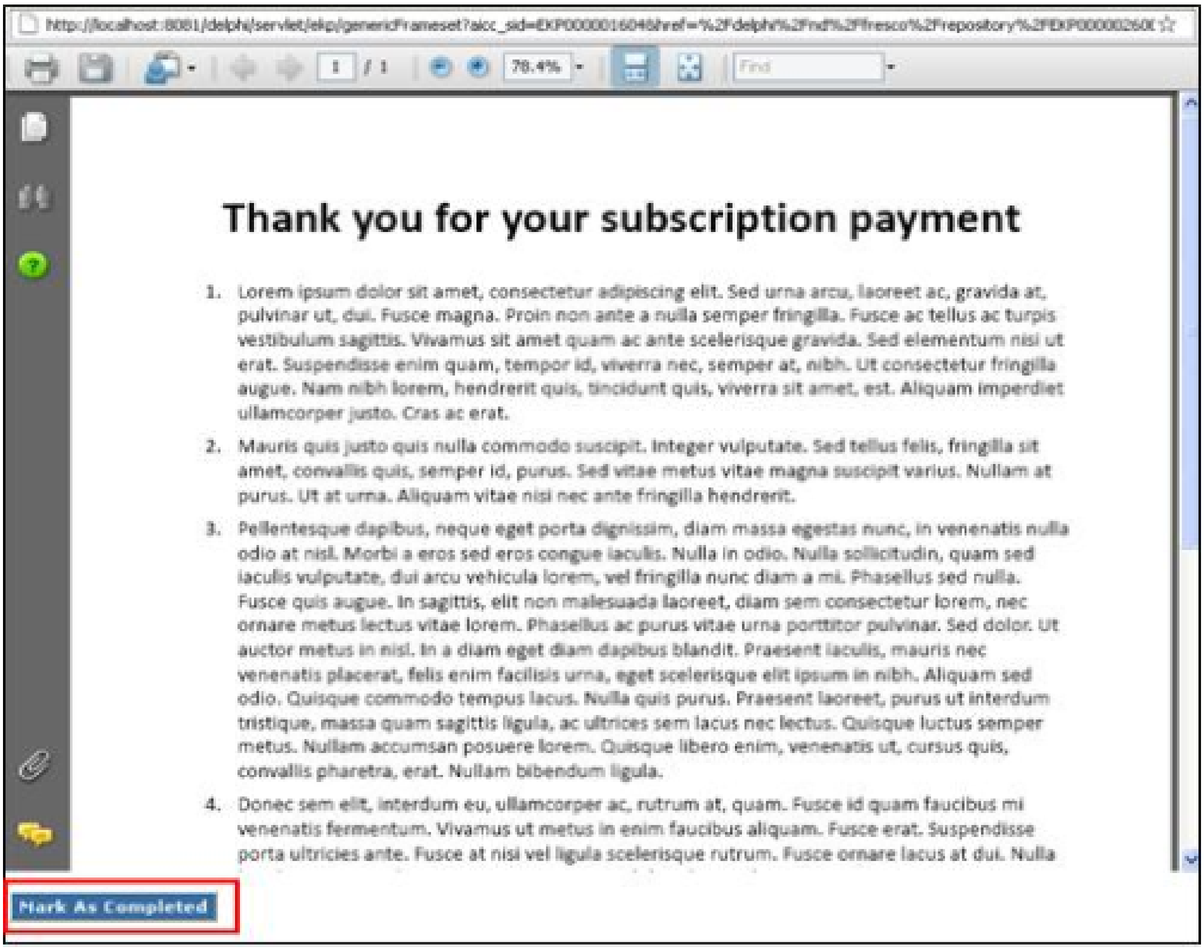
- Assuming a PDF document with a "thank you" message and any post payment information, create a second online module to handle the payment process.



- Finally, create a Program module and add the two online modules to an active program session. Once enrolled, the user should see the payment program in his/her enrolled learning modules. Launching the terms and conditions module will allow the user to read the document and mark as completed (indicating agreement with the terms and conditions).



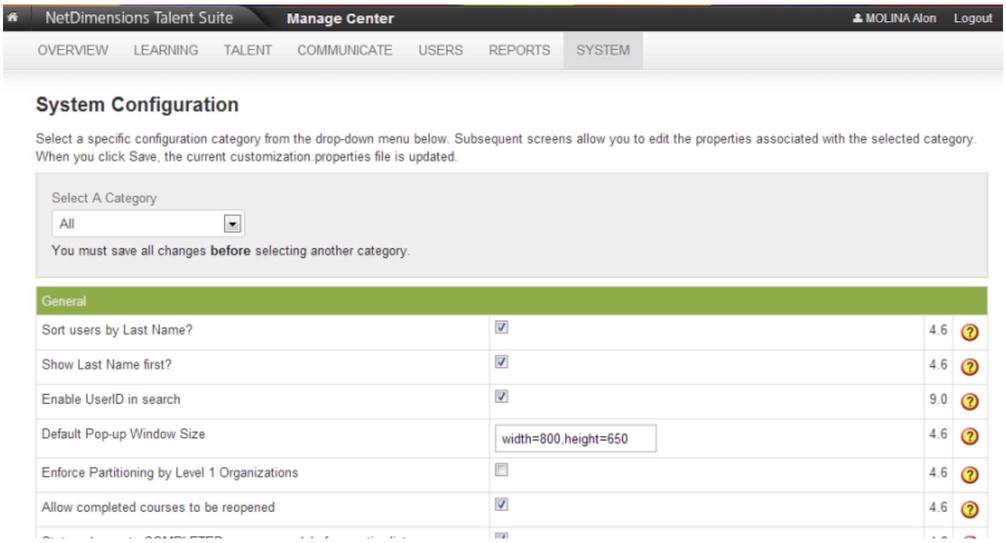
- If payment is successful, the user will be able to open the subscription payment module to mark it as completed.


Thank you for your subscription payment
1. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed urna arcu, laoreet ac, gravida at, pulvinar ut, dui. Fusce magna. Proin non ante a nulla semper fringilla. Fusce ac tellus ac turpis vestibulum sagittis. Vivamus sit amet quam ac ante scelerisque gravida. Sed elementum nisi ut erat. Suspendisse enim quam, tempor id, viverra nec, semper at, nibh. Ut consectetur fringilla augue. Nam nibh lorem, hendrerit quis, tincidunt quis, viverra sit amet, est. Aliquam imperdiet ullamcorper justo. Cras ac erat.
2. Mauris quis justo quis nulla commodo suscipit. Integer vulputate. Sed tellus felis, fringilla sit amet, convallis quis, semper id, purus. Sed vitae metus vitae magna suscipit varius. Nullam at purus. Ut at urna. Aliquam vitae nisi nec ante fringilla hendrerit.
3. Pellentesque dapibus, neque eget porta dignissim, diam massa egestas nunc, in venenatis nulla odio at nisl. Morbi a eros sed eros congue iaculis. Nulla in odio. Nulla sollicitudin, quam sed iaculis vulputate, dui arcu vehicula lorem, vel fringilla nunc diam a mi. Phasellus sed nulla. Fusce quis augue. In sagittis, elit non malesuada laoreet, diam sem consectetur lorem, nec ornare metus lectus vitae lorem. Phasellus ac purus vitae urna porttitor pulvinar. Sed dolor. Ut auctor metus in nisl. In a diam eget diam dapibus blandit. Praesent iaculis, mauris nec venenatis placerat, felis enim facilisis urna, eget scelerisque elit ipsum in nibh. Aliquam sed odio. Quisque commodo tempus lacus. Nulla quis purus. Praesent laoreet, purus ut interdum tristique, massa quam sagittis ligula, ac ultrices sem lacus nec lectus. Quisque luctus semper metus. Nullam accumsan posuere lorem. Quisque libero enim, venenatis ut, cursus quis, convallis pharetra, erat. Nullam bibendum ligula.
4. Donec sem elit, interdum eu, ullamcorper ac, rutrum at, quam. Fusce id quam faucibus mi venenatis fermentum. Vivamus ut metus in enim faucibus aliquam. Fusce erat. Suspendisse porta ultricies ante. Fusce at nisi vel ligula scelerisque rutrum. Fusce ornare lacus at dui. Nulla
Mark As Completed

Displaying Total Training Time under Enrolled Learning Modules

You may configure the settings to show the Total Training Time column in the Enrolled Learning Modules tab.
To configure the settings:

1.Click **Manage Center > System > General Settings > System Configuration**. The *System Configuration* screen appears.



2.Scroll down to the Enrolled Learning Modules Category or select it from the drop-down list.

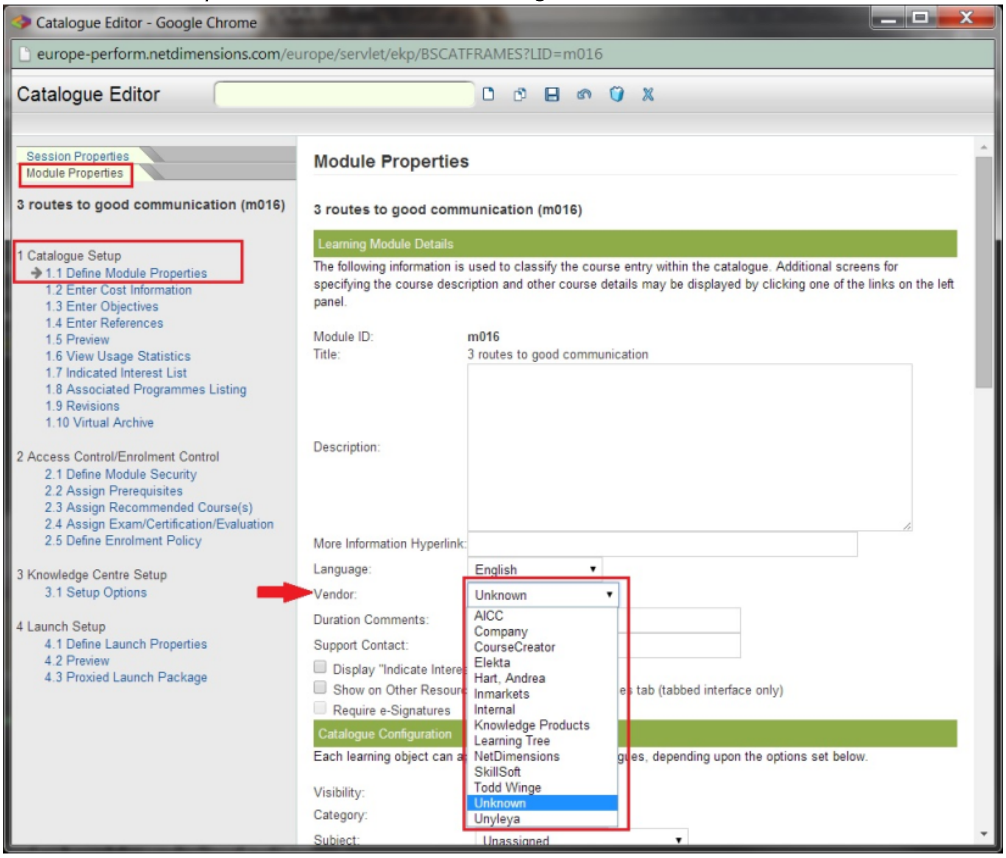
3.Click the box beside the **Show Total Training Time** column on Enrolled Learning Modules tab field.

4.Click **Save**. The Total Training Time column should now appear in the Available Courses tab.

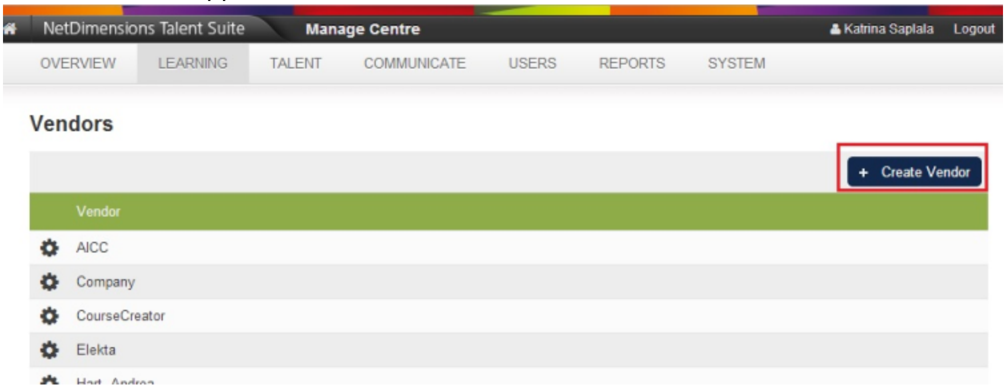
Vendor Categories

(applies to NetDimensions Talent Suite)

You may configure a list of courseware vendors that appear in the Vendor drop down list that appears in the *Module Properties* screen of the Catalog Editor.



To maintain a vendor list click **Manage Center > Learning > Catalog Configuration > Vendors**. The *Vendors* screen appears.



Adding New Vendors

To add a new vendor entry:

1. Type in the vendor's name in the New Name field.
2. Click **Add**. The application returns an acknowledgement.
3. Click **Back to Maintenance Form**.

Updating Vendors

To edit a vendor entry:

1. Select the desired Vendor from the drop down list by the Vendor field.
2. Type in the new category in the New Name field.
3. Click **Update Selection**. A confirmation dialog box appears.
4. Click **OK.** The application returns an acknowledgement.
5. Click **Back to Maintenance Form**.

Deleting Vendors

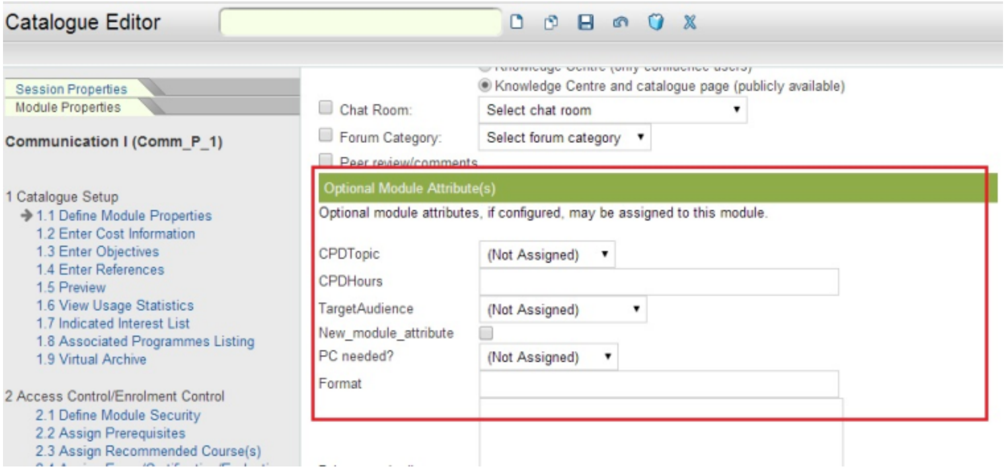
To remove a vendor entry:

1. Select the desired Vendor from the drop down list by the Vendor field.
2. Click **Delete Selection**. A confirmation dialog box appears.
3. Click **OK**. The application returns an acknowledgement.
4. Click **Back to Maintenance Form**.

Module Attributes - Catalog Editor

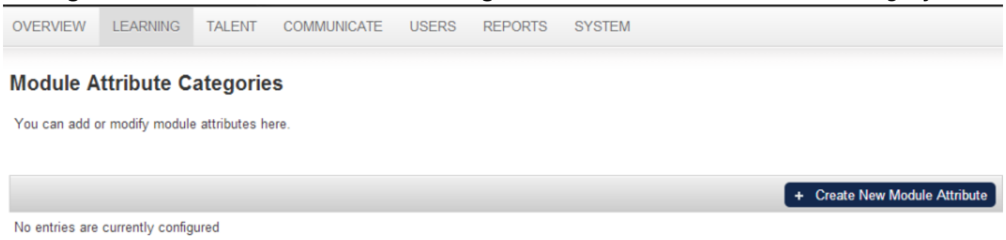
(applies to NetDimensions Talent Suite)

You may specify special qualifications (e.g. Continuing Professional Development or CPD) in the Optional Module Attribute(s) section of the Catalog Editor.



You may define additional special qualifications or attributes (e.g. license qualifications, Continuing Legal Education (CLE), etc.) for a learning module in the Module Attribute Category screen.

To maintain a list of Optional Module Attributes, click **Manage Center > Learning > Catalog Configuration > Module Attribute Categories**. The *Module Attribute Category* screen appears.



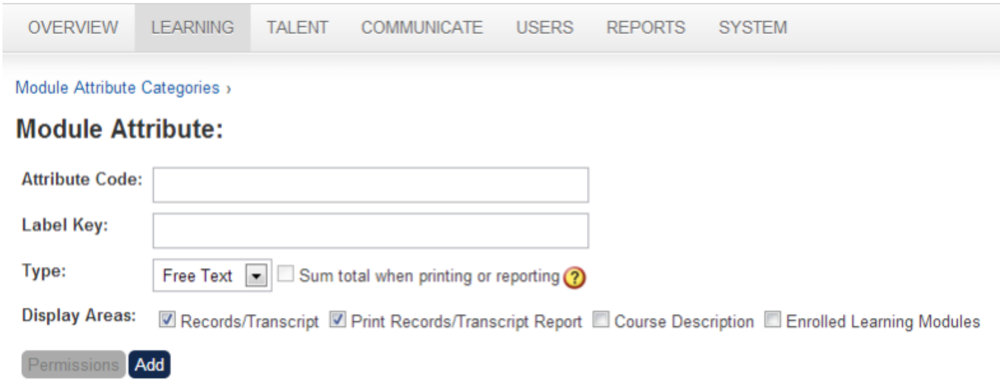
A module attribute can be one of four particular data types:

1. Free-text - the default existing type with which any value may be input
2. Drop-down - the existing type where there is a fixed set of values for the module attribute
3. Numeric - a new type where only numbers may be input for the module attribute on the learning object, e.g. 5, 3.15, -5.4
4. Checkbox - a new type where the user simply checks or un-checks the check box as a way of setting the module attribute on a learning object

Adding Module Attributes

1.To add a New Module Attribute, click Create a New Module Attribute

2.Click **Add**. The screen refreshes.



3.Fill in the necessary information.

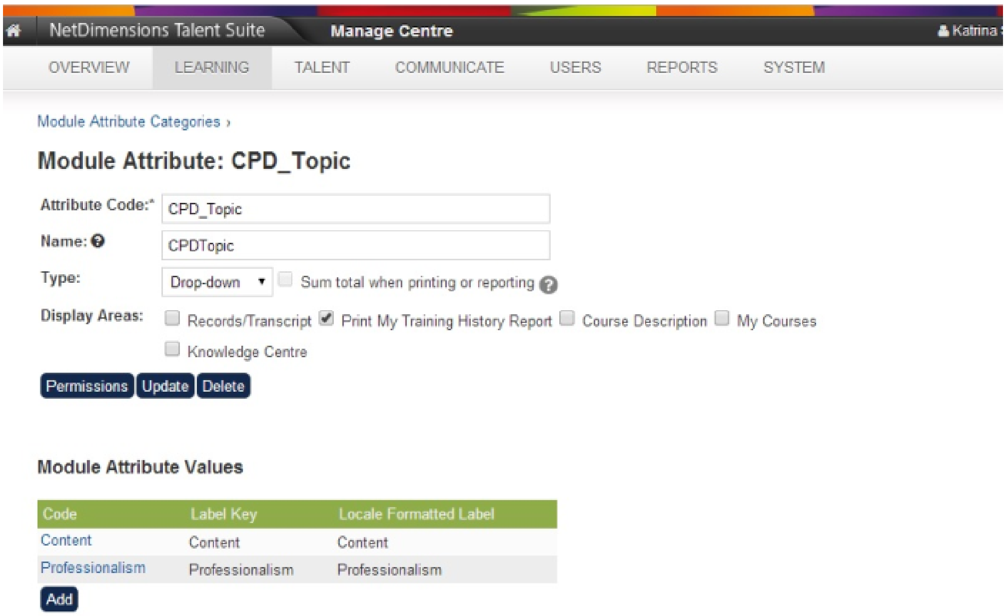
4.Proceed to configure and maintain extra module attributes.

Updating Extra Module Attributes

To edit an Extra Attribute entry:

1.Under the *Module Attribute Category* screen click on the gear icon of the attribute you wish to modify, then click Edit

2.Make the necessary modifications on the Module Attributes screen



3.Click **Update**. The screen refreshes to reflect the changes.

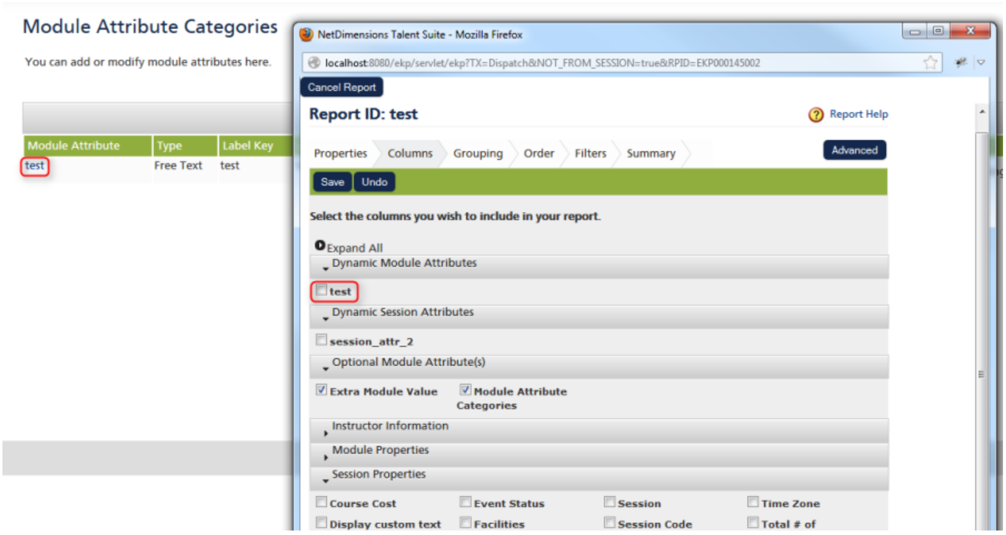
Deleting Extra Module Attributes

To remove extra modules attribute:

1. Click on the desired attribute in the *Module Attribute Category* screen. The relevant Module Attribute screen appears.
2. Click **Delete**.

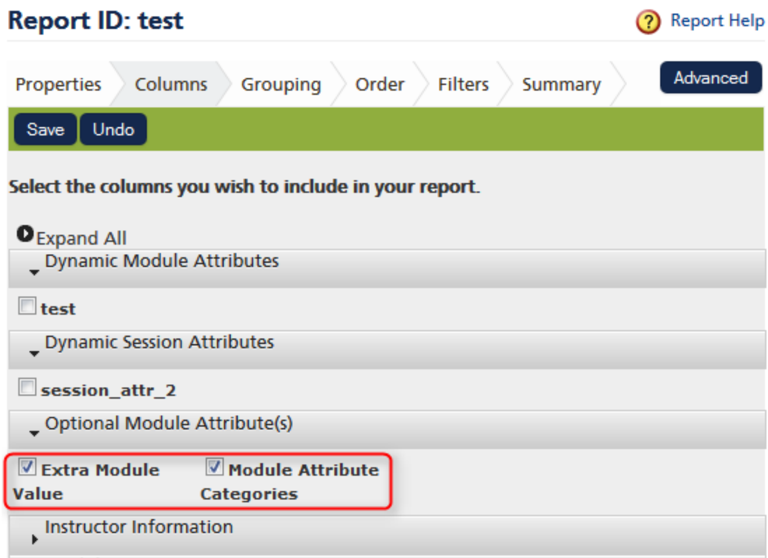
Setting Permission to Module Attributes

Permissions on module attributes are extended to report wizard. Users have to have read or write permission to the module attributes in order to view them in report wizard.



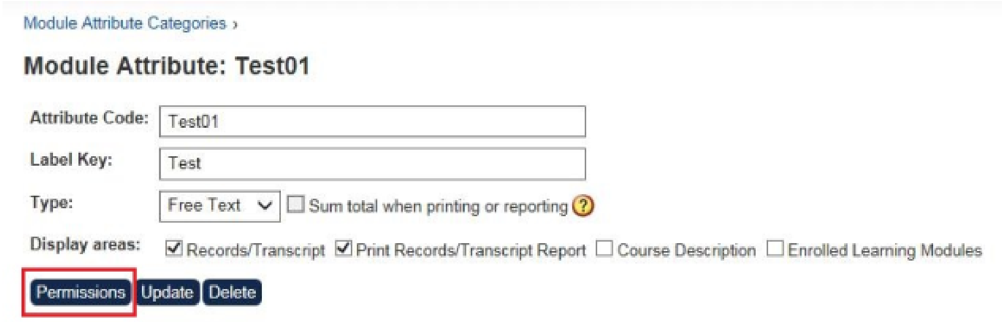
A user must have read/write permission to a module attribute in order to select it in report wizard.

Extra Module Value and Module Attribute Categories also reference module permissions. When these two options are checked, the report will include the module attributes that the user has access to in these two columns.

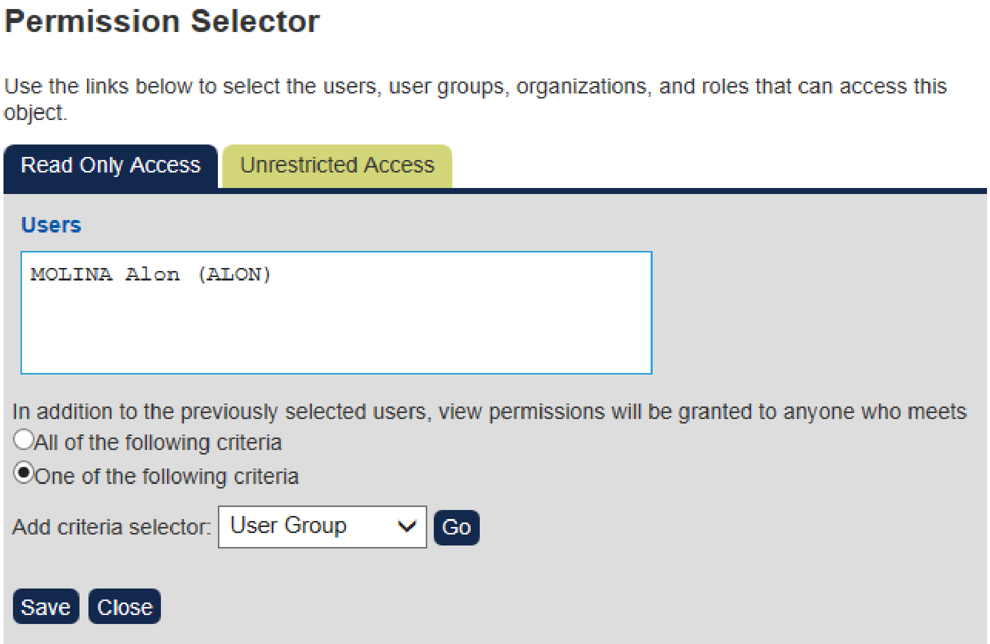


1.From the list, select the attribute you where you want to set the permission.

2.A menu will be displayed on the screen. Click **Permissions**.

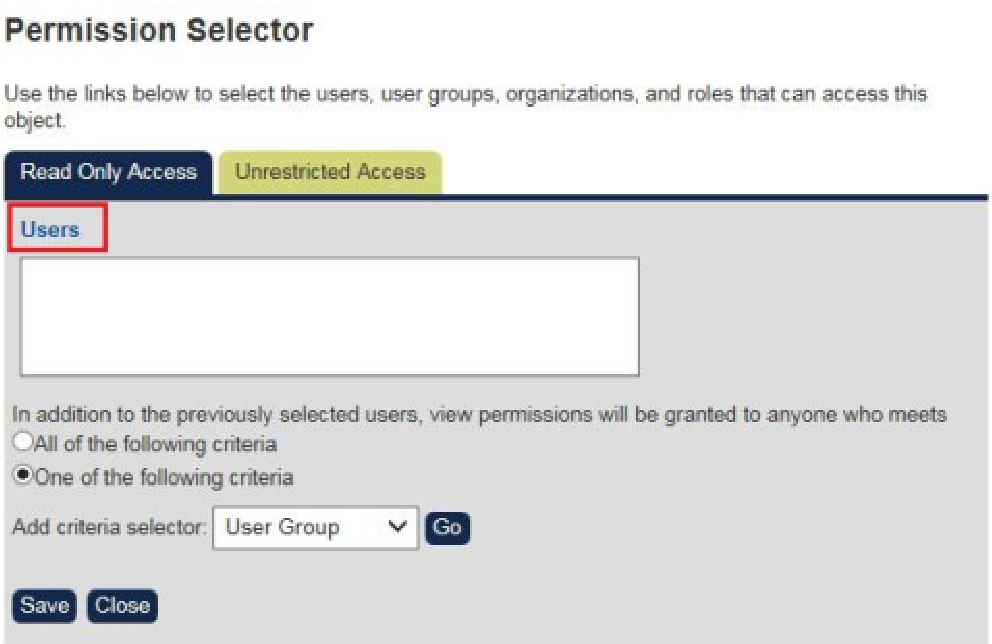


3.The *Permission Selector* screen is displayed. Configure the permission setting using the guideline below the image.

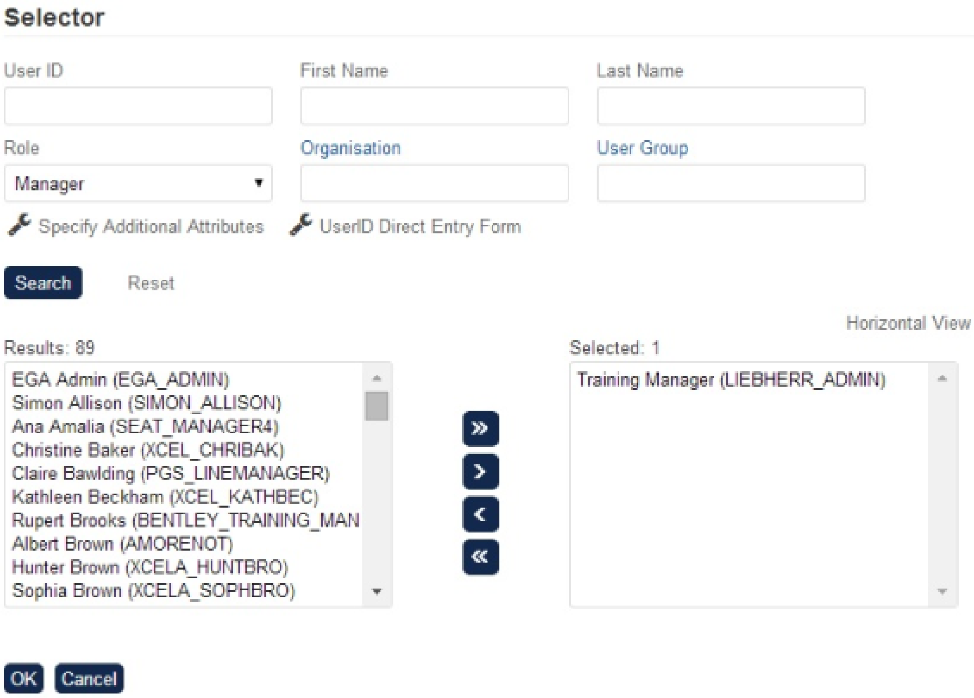


4.Permissions on module attributes are extended to report wizard. Users have to have read or write permission to the module attributes in order to view them in report wizard.

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

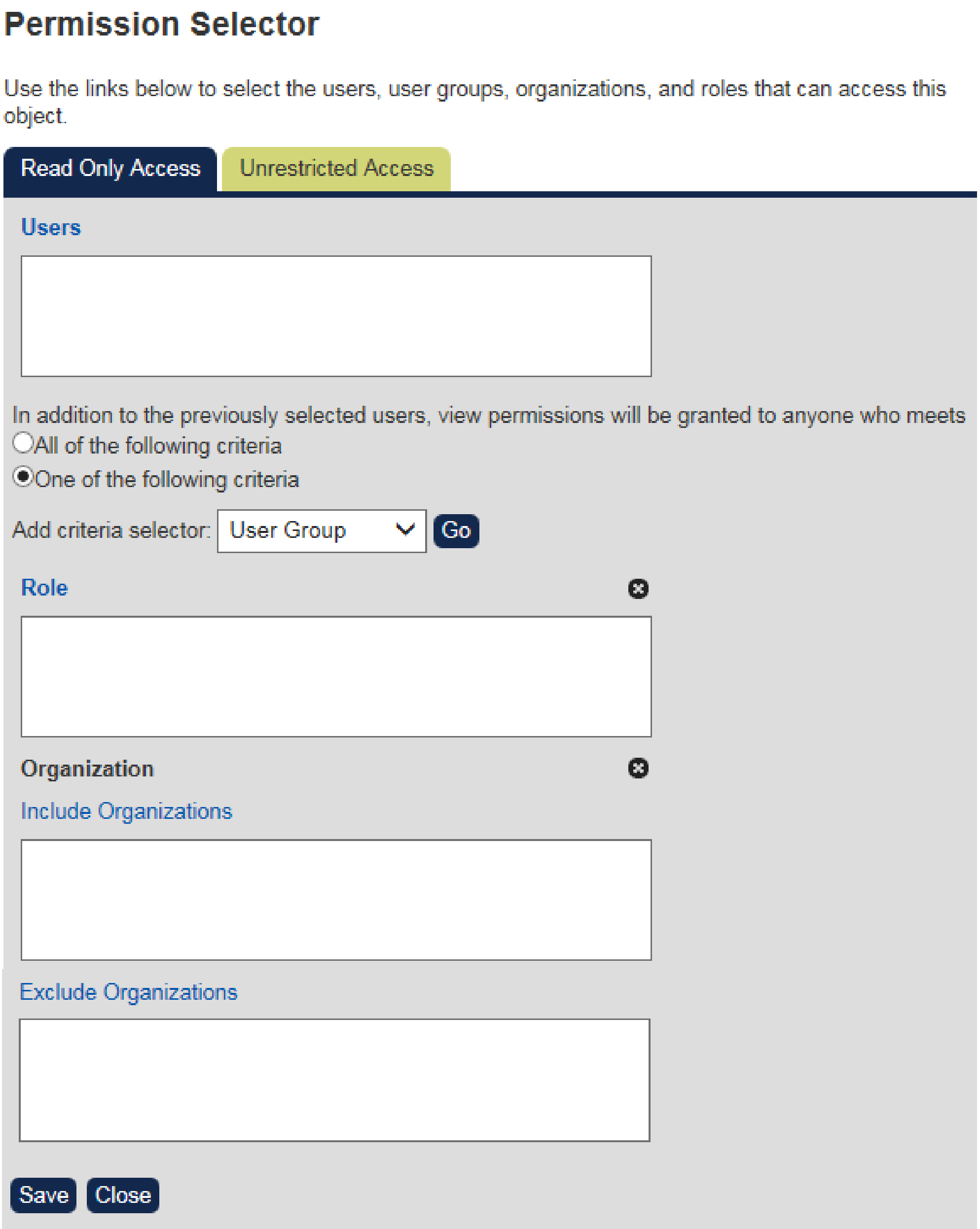


6.This opens the *User Selector* screen to select a specific user or group of users.



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 all users belongs to the criteria defined in the Add criteria selector. For instance that user added the criteria Role and Organization as shown in the image below.
  - This means that the user must belong to the roles AND organization in order for the user to access the permission to view the report.



- ***One of the following criteria***
  - This means that viewing permission can be granted to all users belongs to any of the criteria defined in the Add criteria selector.
  - This means that the user must belong to the roles OR organization in order for the user to access the permission to view the report.
- ***Add criteria selector***
  - This allows you to add criteria. To add the criteria, click the selector dropdown button and then select the preferred criteria.

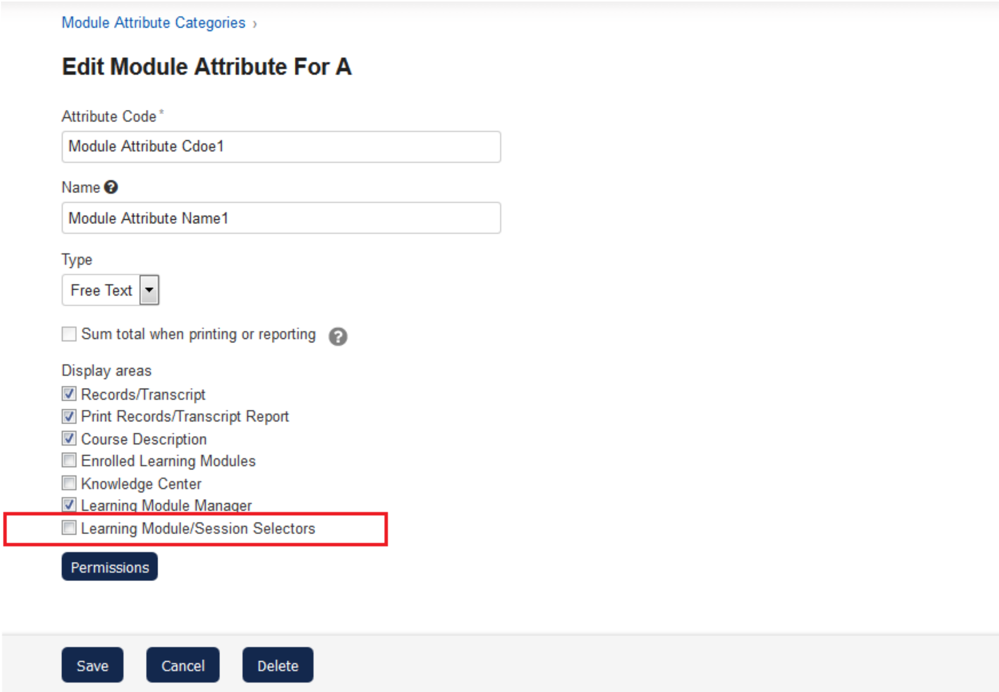
Note: For every selected criterion, a criterion box will be displayed. To select a specific user, group or organization that belongs to the criteria, click the link positioned at the right top of each box. See the procedure in the Appendix section on how to select a user, group or an organization.

Searching by Module Attributes

Module attributes are pretty dynamic and they could support various data types, they can be used to classify a course with a certain value. Often looking up courses would be much easier if it can be filtered by a certain attribute. This filter can be enabled in new applicable search areas such as Module and Session selectors and the administrative Learning Modules search.

1.Module Attributes as Module / Session Selector Parameters

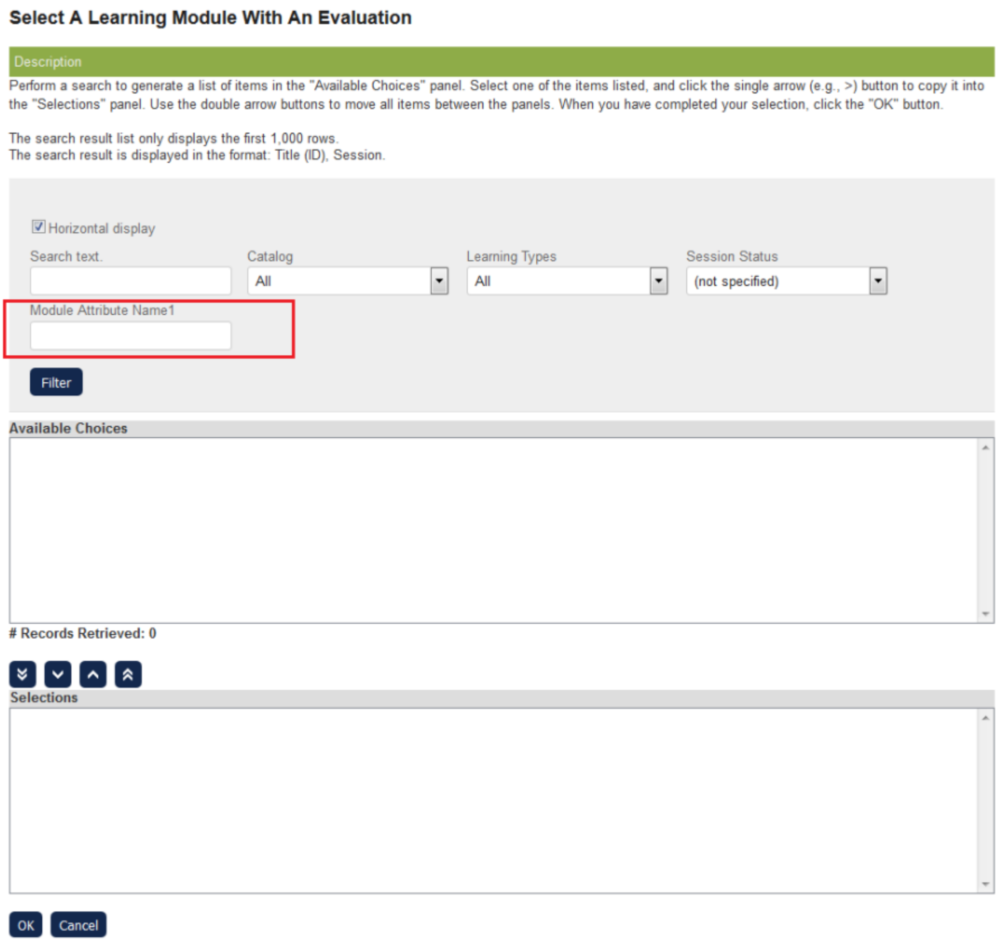
On each attribute configuration, it's optional to enable the attribute as a search filter on any available search screen. The "Learning Module Selector" and "Learning Module/Session Selectors" search areas have been added as display area options.



By checking the "Learning Module/Session Selectors" Display areas option, this module attribute will appear on the Module, Module Session and Program Session selectors which allow searching with this filter.

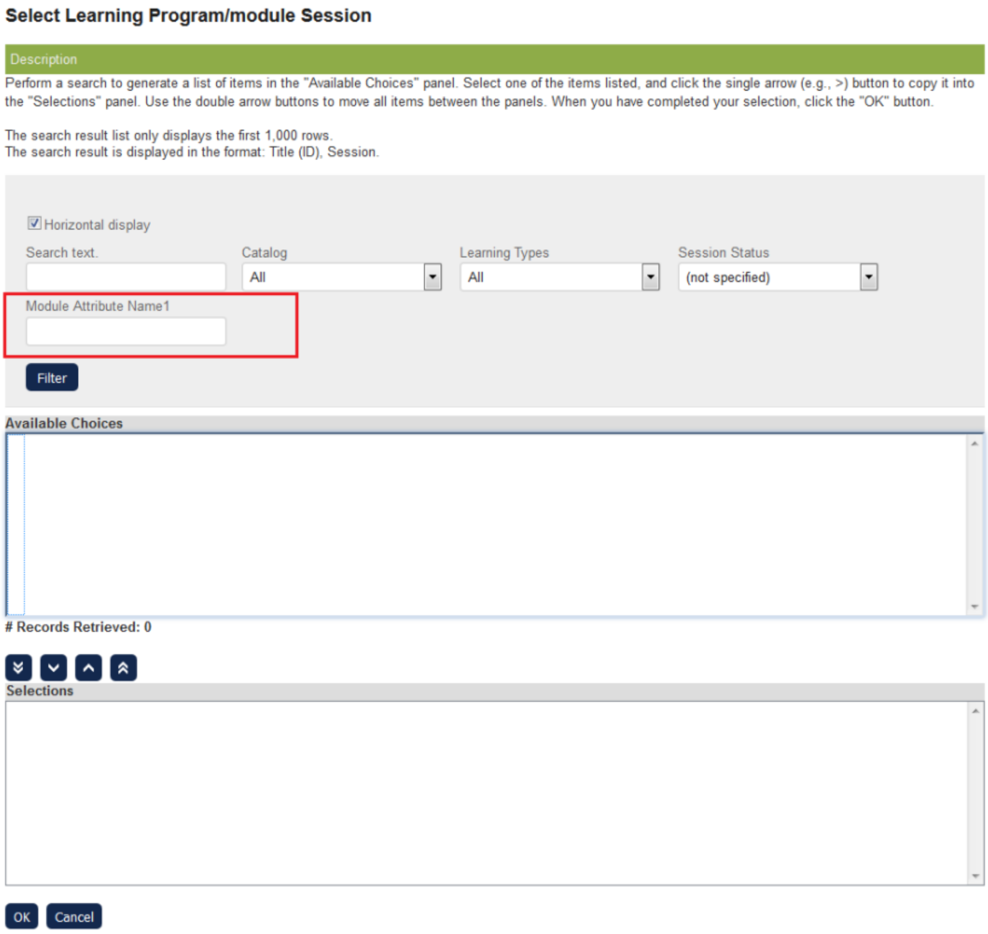
2.Module Attributes as Module Selector Parameters

It's pretty intuitive with the usage of the module attribute filter in the module selector as displayed below.



3.Module Attributes as Session Selector Parameters

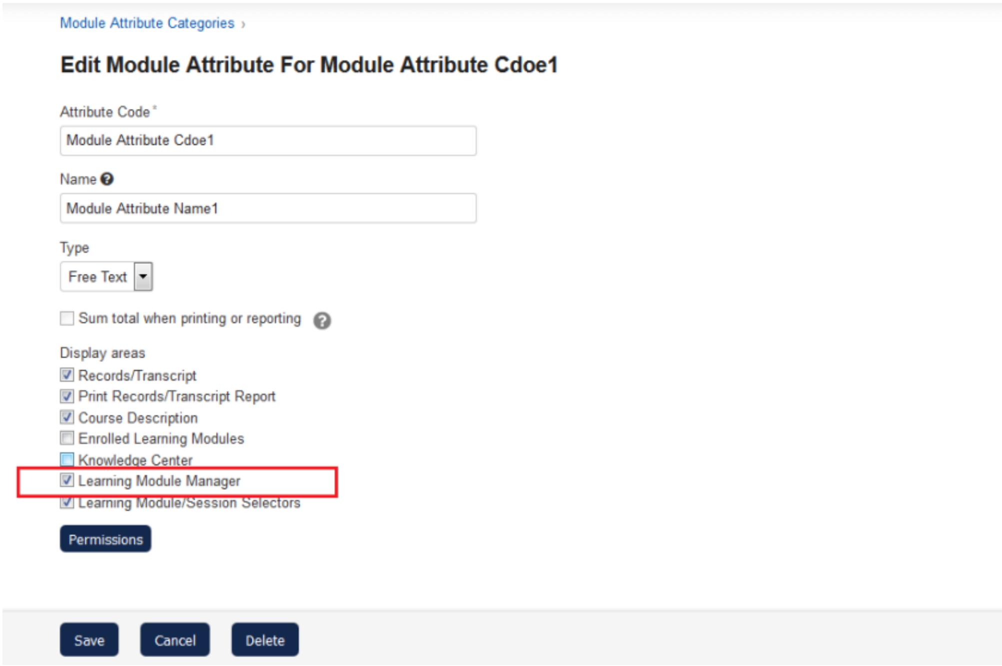
When trying to identify a certain program/module session for selection, it would be handy to be able to find the right module using its assigned attribute value first then drill down to see the list of its relevant sessions.



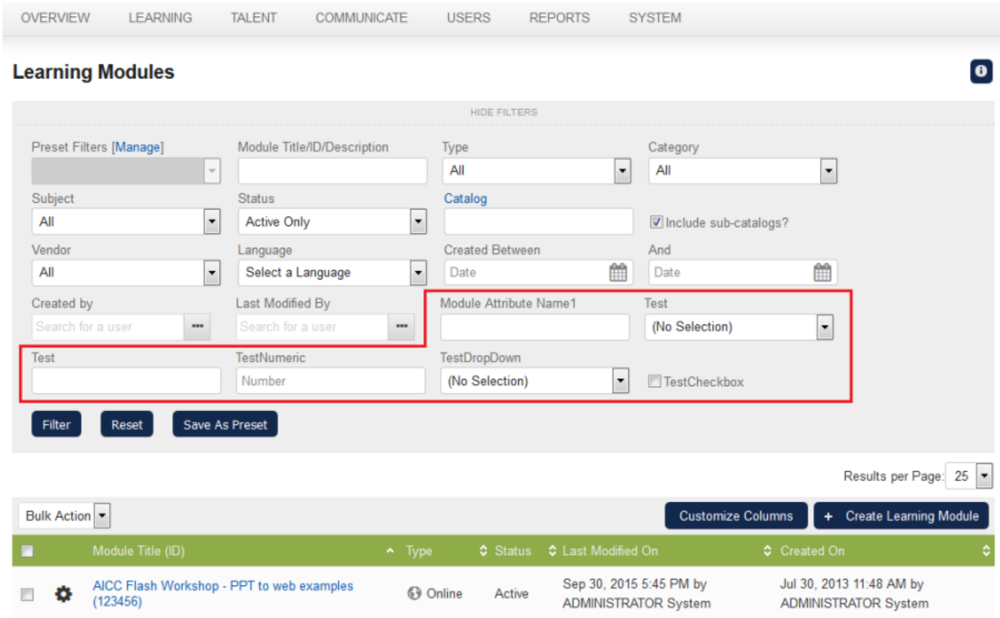
4.Module Attributes as Manage > Learning Modules Filters

As a course administrator, one of the most frequent visited screens would be the administrative Learning Modules search, this is the place to look up a certain course to configure its settings. Out of the large number of courses uploaded to the system, module attribute could serve as a useful filter to narrow down relevant training in the search.

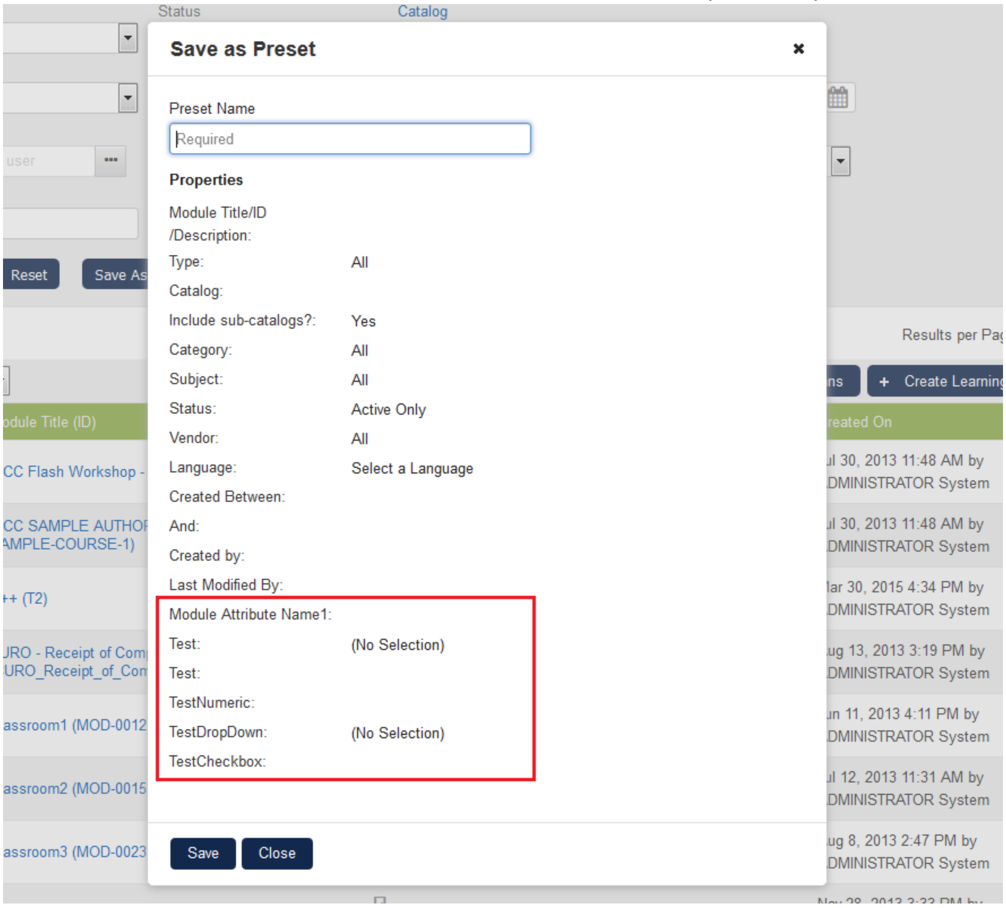
At the attribute level, showing the filter in the "Learning Modules Manager" display area can be individually customized. The default value of the checkbox is not checked and it requires explicit action to make the attribute show as a filter.



By checking the "Learning Modules Manager" Display areas option, enabled module attribute filters will appear on the Manage Learning Modules search as displayed below. Since they are dynamically generated, they appear at the end of the list of filters, all supported attribute types can be enabled as filters.



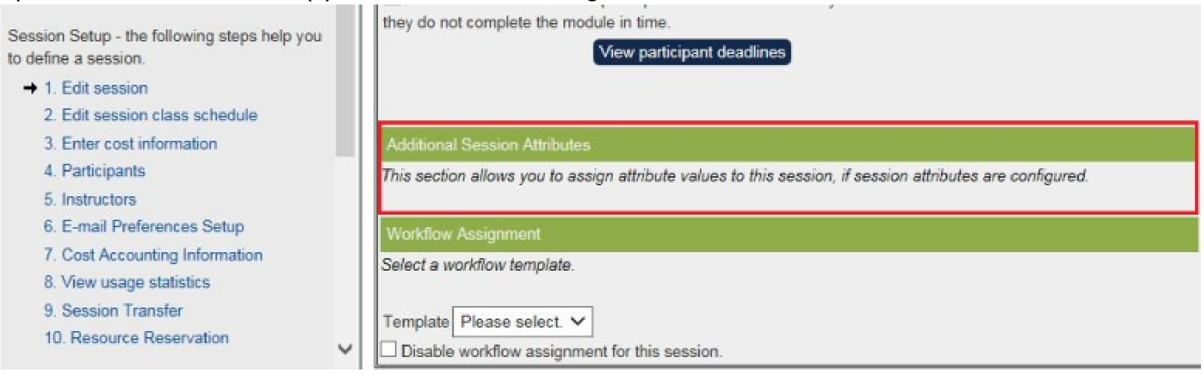
Selected module attribute filter values can also be saved as part of a preset filter for reuse.



Session Attributes

(applies to NetDimensions Talent Suite)

You may specify special qualifications (e.g. Continuing Professional Development or CPD) in the Optional Session Attribute(s) section of the Catalog Editor.



To maintain a list of Optional Module Attributes, click **Manage Center > Learning > Catalog Configuration > Module Attribute Categories**. The *Module Attribute Category* screen appears.

A module attribute can be one of four particular data types:

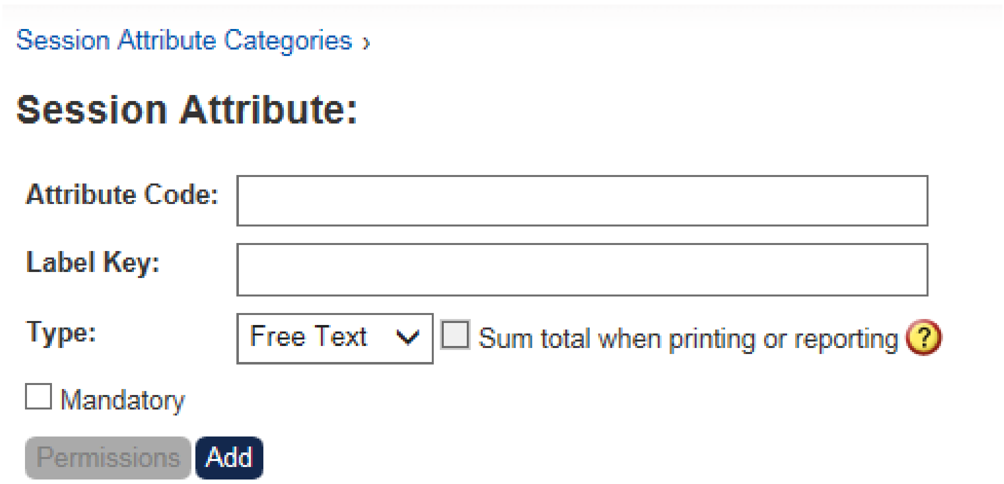
1. Free-text - the default existing type with which any value may be input
2. Drop-down - the existing type where there is a fixed set of values for the module attribute
3. Numeric - a new type where only numbers may be input for the module attribute on the learning object, e.g. 5, 3.15, -5.4
4. Checkbox - a new type where the user simply checks or un-checks the check box as a way of setting the module attribute on a learning object

Adding Session Attributes

To add a new Session Attribute:

1.Click **Create Session Attribute**. The screen refreshes.

2.Fill in the necessary information.

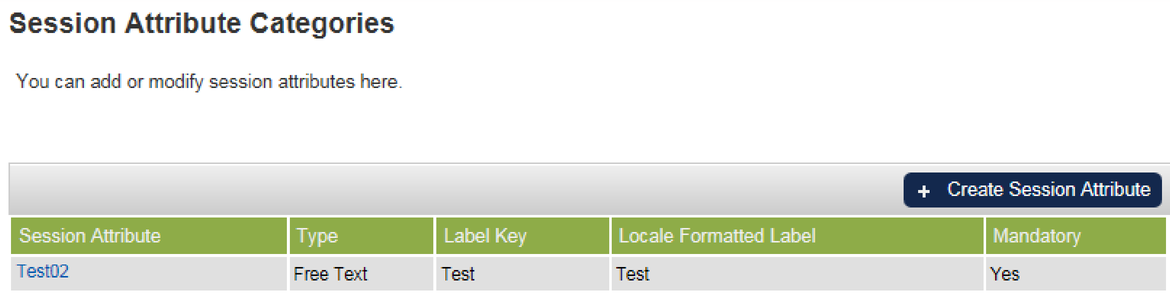


3.Click **Add** to add the attribute.

Updating Extra Session Attributes

To edit an Extra Attribute entry:

1.Click on the desired attribute in the *Session Attribute Category* screen. The relevant Session Attribute screen appears.



2.Type in the new name.

3.Click **Update**. The screen refreshes to reflect the changes.

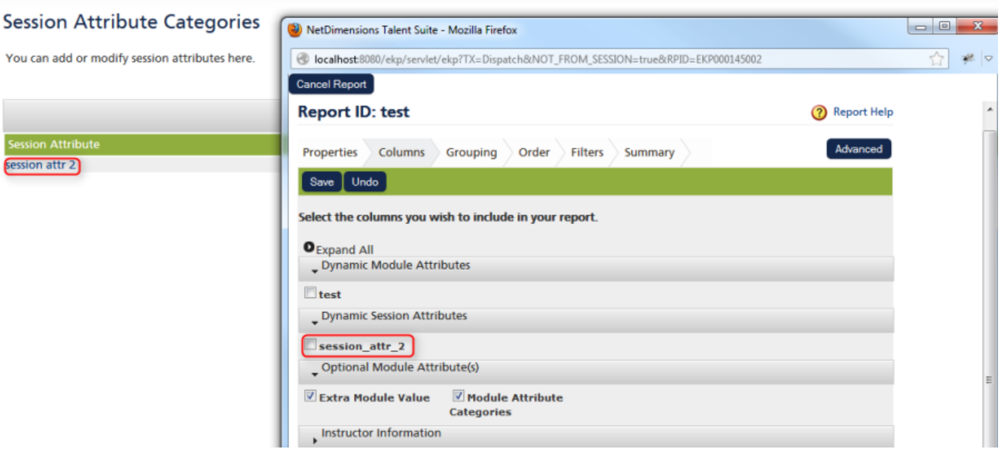
Deleting Extra Session Attributes

To remove extra modules attribute:

1. Click on the desired attribute in the *Session Attribute Category* screen. The relevant Module Attribute screen appears.
2. Click **Delete**.

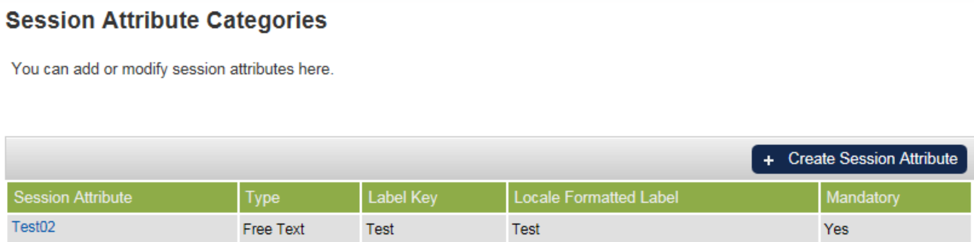
Setting Permission to Session Attributes

Permissions on session attributes are extended to report wizard. Users have to have read or write permission to the Session attributes in order to view them in report wizard.

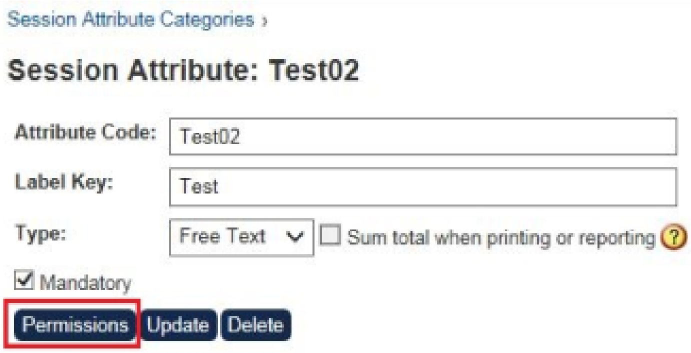


A user must have read/write permission to a Session attribute in order to select it in report wizard

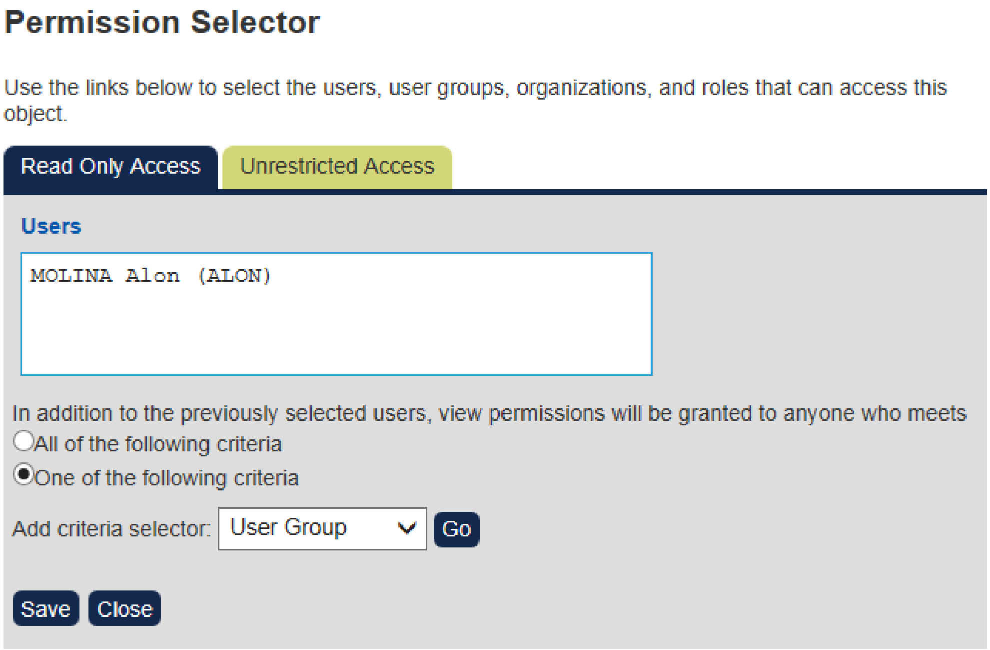
1.From the list, select the attribute you where you want to set the permission.



2.A menu will be displayed on the screen. Click **Permissions**.

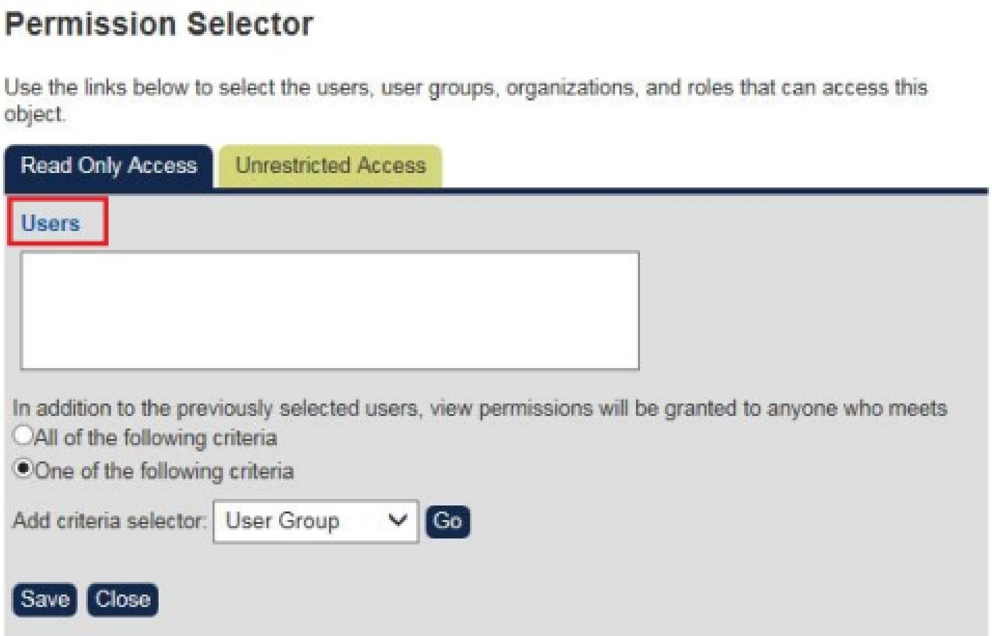


3.The *Permission Selector* screen is displayed. Configure the permission setting using the guideline below the image.

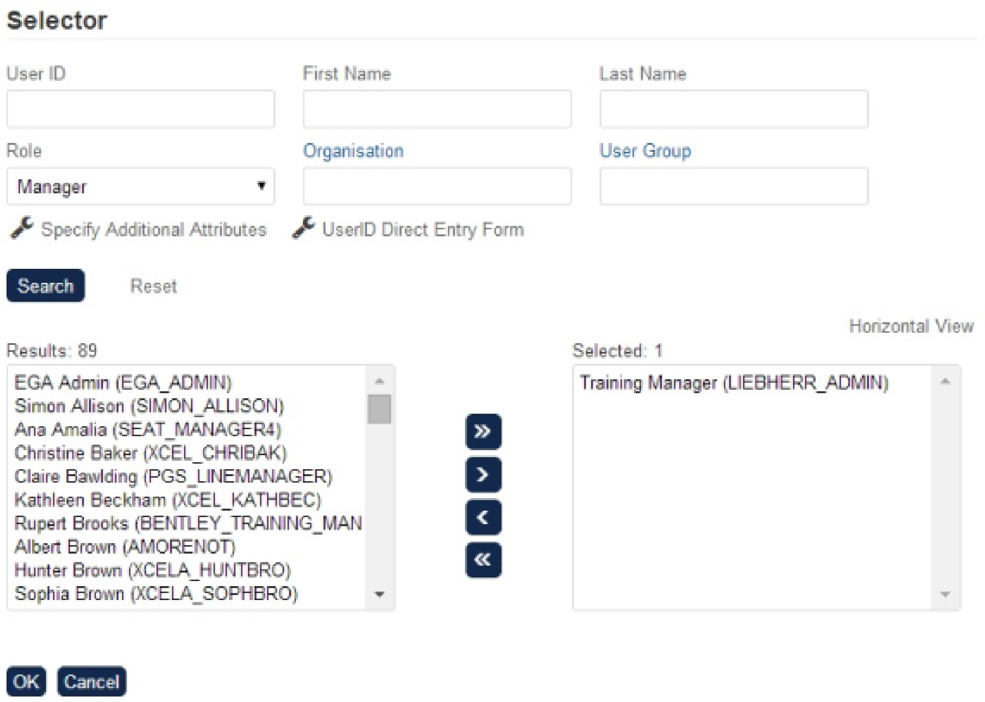


4.Permissions on session attributes are extended to report wizard. Users have to have read or write permission to the module attributes in order to view them in report wizard.

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

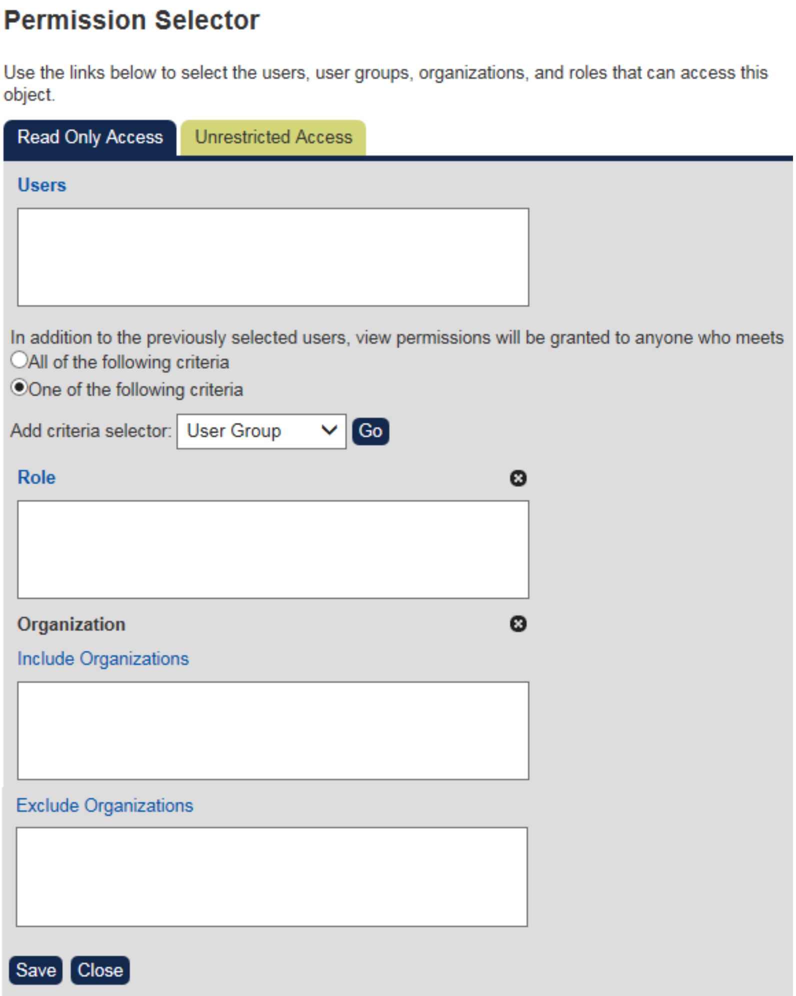


6.This opens the *User Selector* screen to select a specifi user or group of users.



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 all users belongs to the criteria defined in the Add criteria selector. For instance that user added the criteria Role and Organization as shown in the image below.
  - This means that the user must belong to the roles AND organization in order for the user to access the permission to view the report.

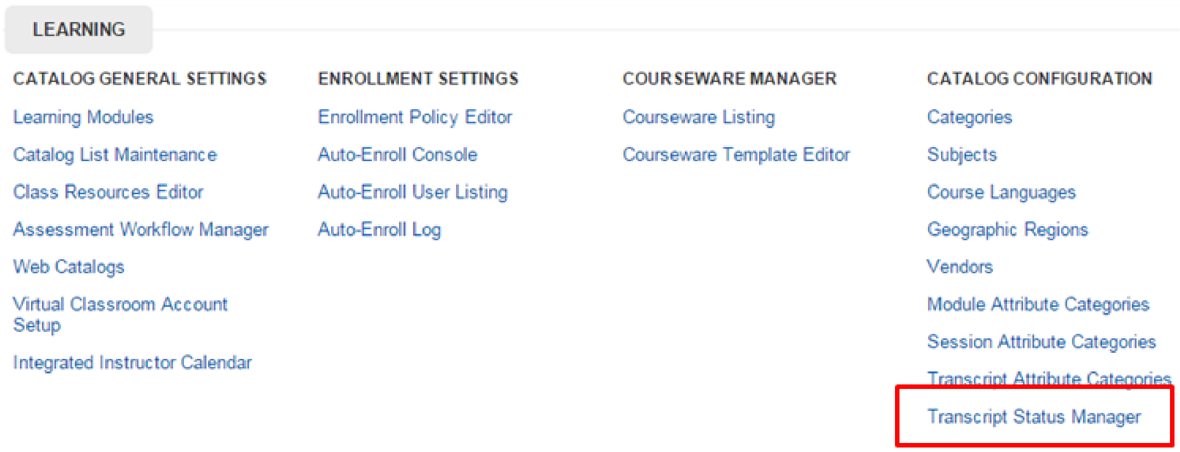


- ***One of the following criteria***
  - This means that viewing permission can be granted to all users belongs to any of the criteria defined in the Add criteria selector.
  - This means that the user must belong to the roles OR organization in order for the user to access the permission to view the report.
- ***Add criteria selector***
  - This allows you to add criteria. To add the criteria, click the selector dropdown button and then select the preferred criteria.

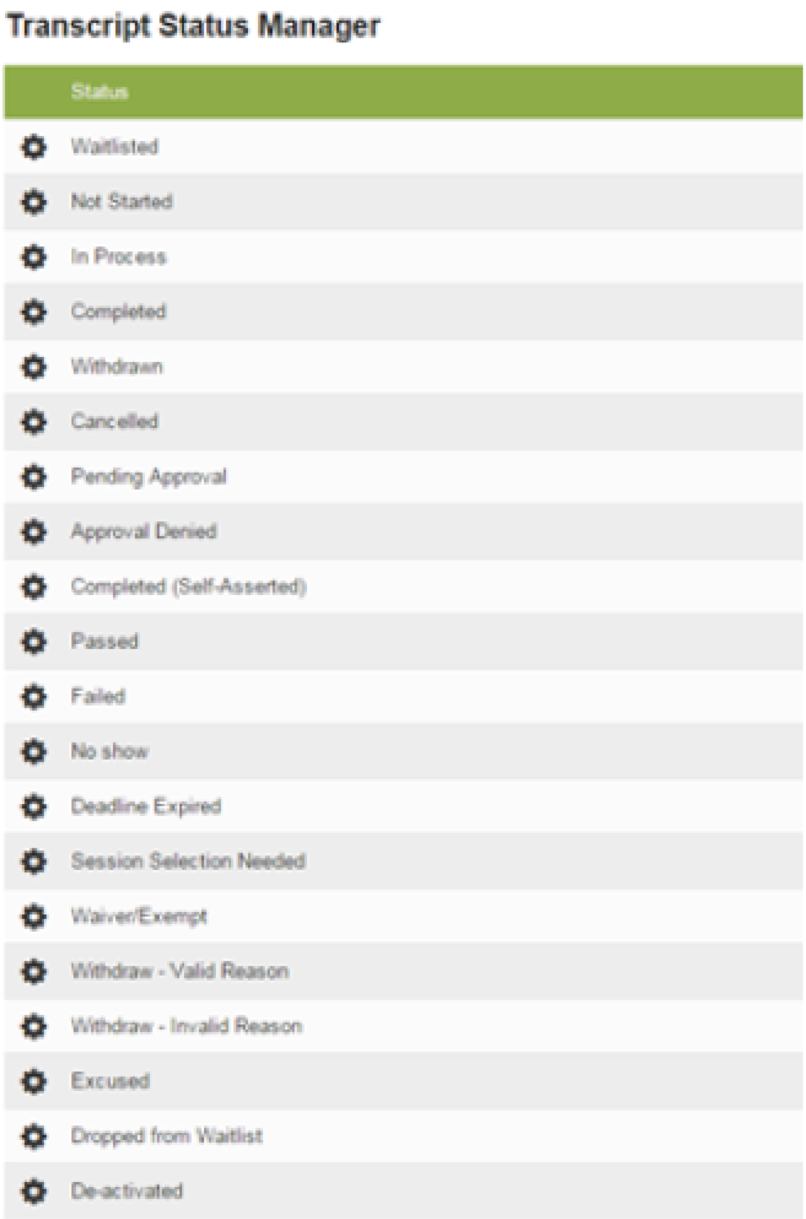
Note: For every selected criterion, a criterion box will be displayed. To select a specific user, group or organization that belongs to the criteria, click the link positioned at the right top of each box. See the procedure in the Appendix section on how to select a user, group or an organization.

Permissions on Transcript Status

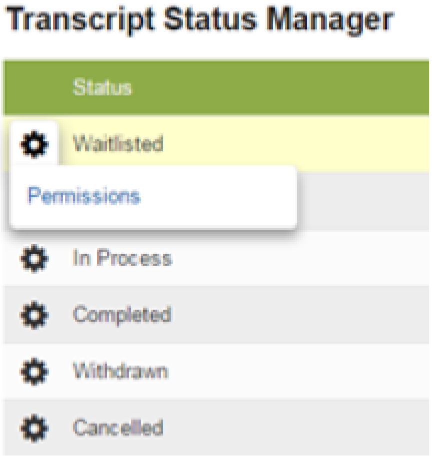
As shown in the figure below, **Manage Center > Learning > Catalog Configuration > Transcript Status Manager** allows transcript statuses to be managed, for now only for setting up permissions.



Inside the Transcript Status Manager, you will see a list of all available transcript statuses with a gear button on each of the transcript statuses.

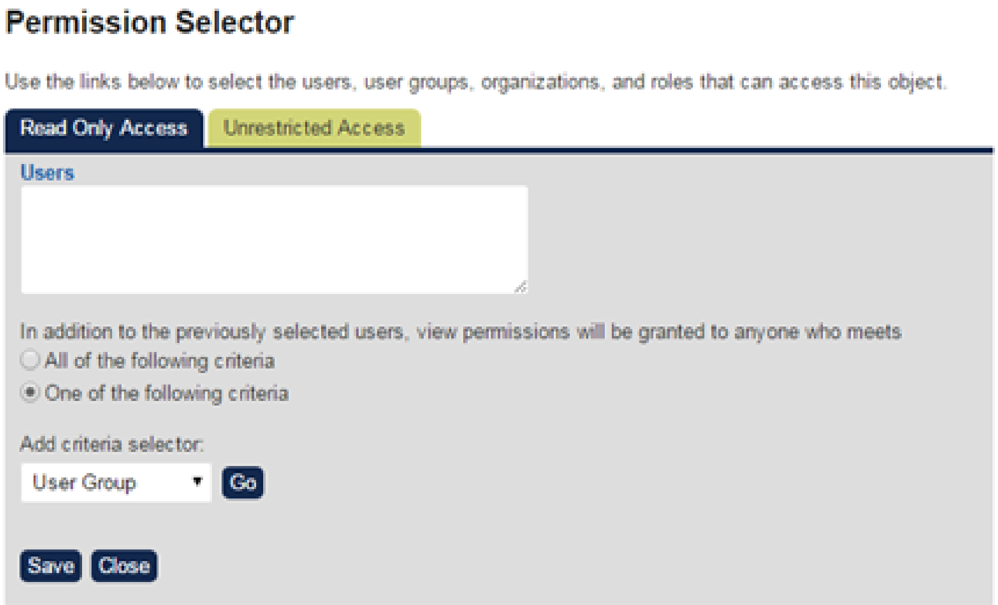


Select a transcript status by moving the mouse cursor towards the gear button. The drop-down menu allows you to configure the permissions of the selected transcript status.



Click on "permissions". The permission selector will pop up. Through the selector, there are two permissions for transcript statuses.

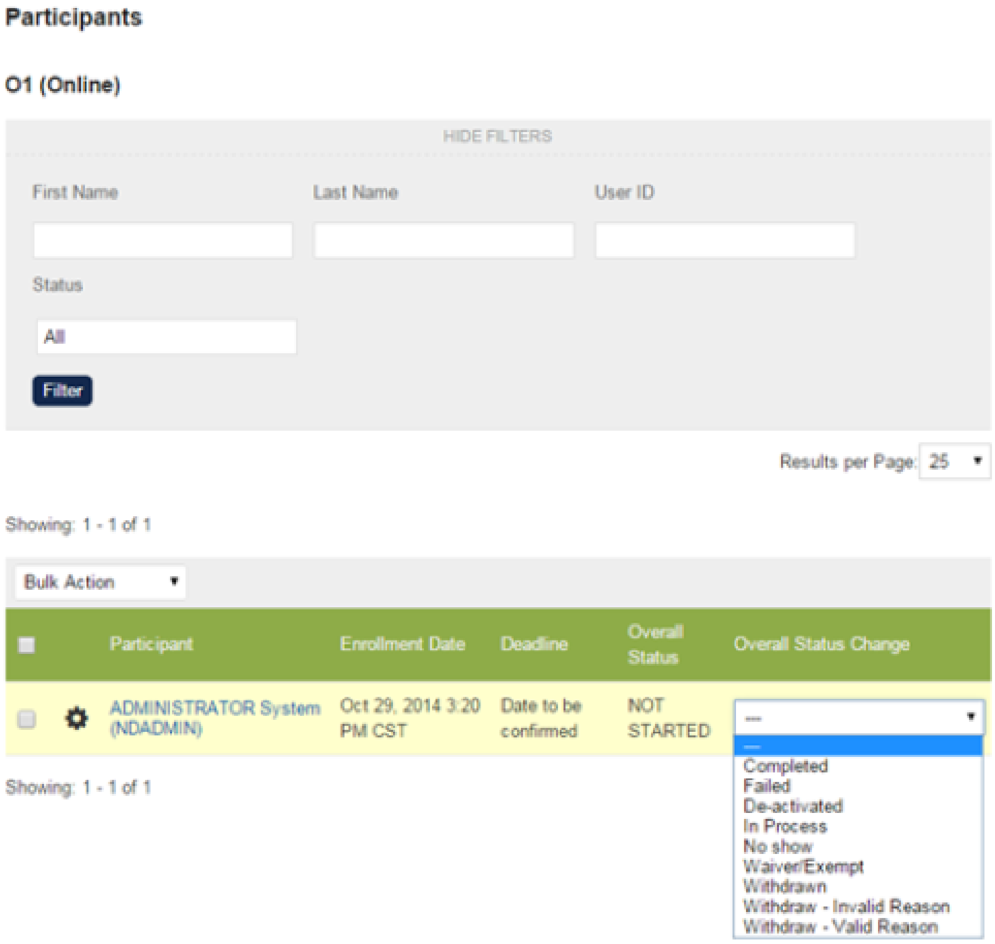
- Read permission allows you to select the status.
- Write permission allows you to edit the status.



After the access targets are configured, click the "Save" button to save your changes. The status permissions will be reflected in the following locations:

- Catalog Editor Participants
- Enrollment Wizard
- Teach Review Participants
- Training Records Loader

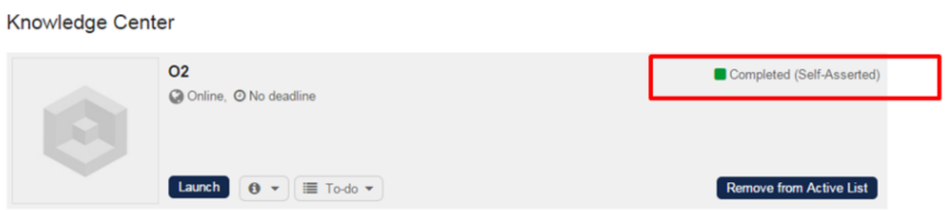
The figure below shows the Catalog Editor with the configured status permission filtering.



Decoupling of *Finished Using*

The "Finished Using" transcript status has long been open for different interpretations which leads to different state adoptions associated to training records. The most common interpretation is that this status is for closing out an enrollment without fully completing the content. While historically, this status has been used to give the learner an option to assert that the enrollment has been completed which would eventually contribute to certificate and competency acquisition. For compliance reasons, this multi-faceted interpretation of transcript state would need to be branched off to clarify two such conditions.

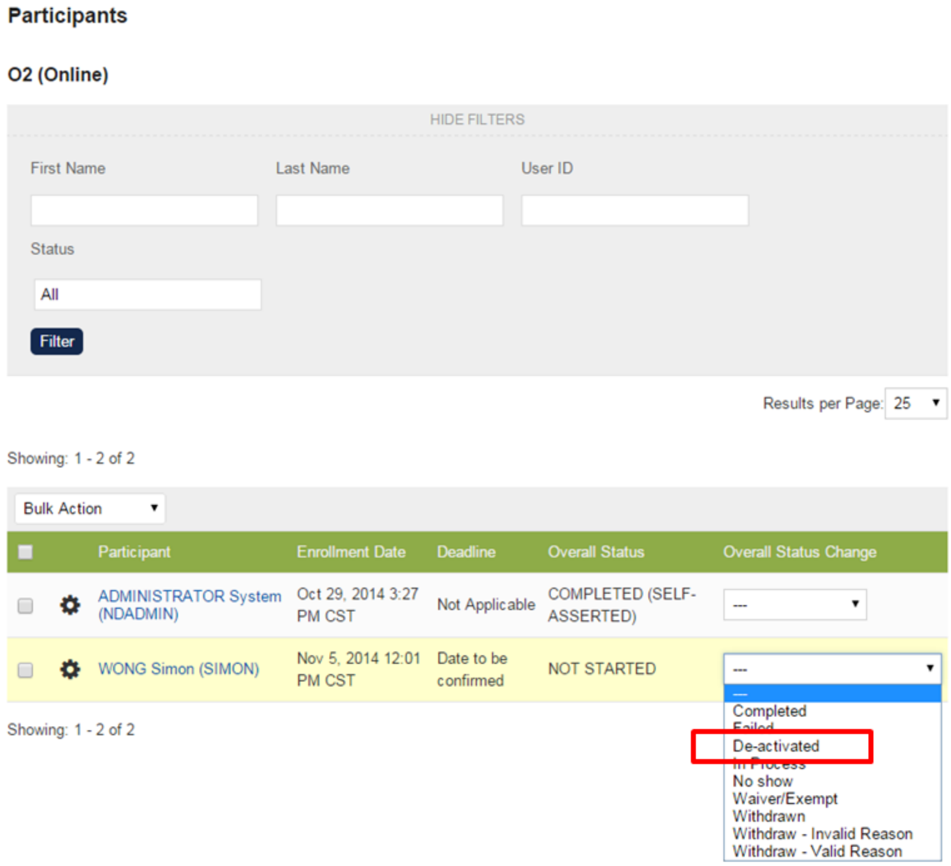
- **Completed (Self-Asserted)**: "Finished Using" status is now re-labeled as "Completed (Self-Asserted)" which is another distinguished form of completion, one that is self-asserted by the learner. Its status change can only be invoked by the learner (eg. when marking non-track-able content as complete or just simply clicking the "Completed" button in the Knowledge Center before the track-able content being recognized as complete by the courseware). Note that just like the original "Finished Using" status, "Completed (Self-Asserted) will contribute to certificate award and competency acquisition. Essentially, a learner can withdraw from a course, mark a course complete (self-asserted) or be automatically completed by fulfilling the courseware completion requirement.



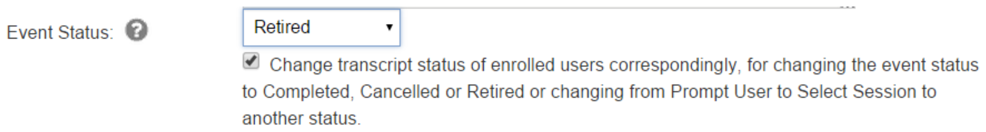
- **Deactivated:** A new "Deactivated" status has been introduced to cater for the need of closing out an active enrollment. "Deactivated" is a terminal status but it will not contribute to certificate or competency acquisition. It is available as an administrative action, including the participants section in Catalog Editor, Enrollment Wizard, Review Participants in Teach, status change on authorized payment in Payment History, changes made through CSV loader and API. On automatic program completion rollup, if any elective sub-module(s) is an incomplete state which needs to be closed off (or for target course which has acquired by substitutes when we'll introduce course equivalency), the course will be tagged with a "Deactivated" status.

Note:

- A "Deactivated" transcript record won't contribute to program completion, so if you have one mandatory program course that is marked as "Deactivated" somehow by an administrator, this program won't be able to automatically complete.
- A "Deactivated" transcript record won't share credit, so for subsequent program enrollment that has the same course and the program is configured to be sharing credits, the learner will be re-enrolled on the program course again.



For the case of retiring a course session, there's an optional setting to tag all incomplete transcripts in the session as "Deactivated".



Courseware Editor - Revision Support

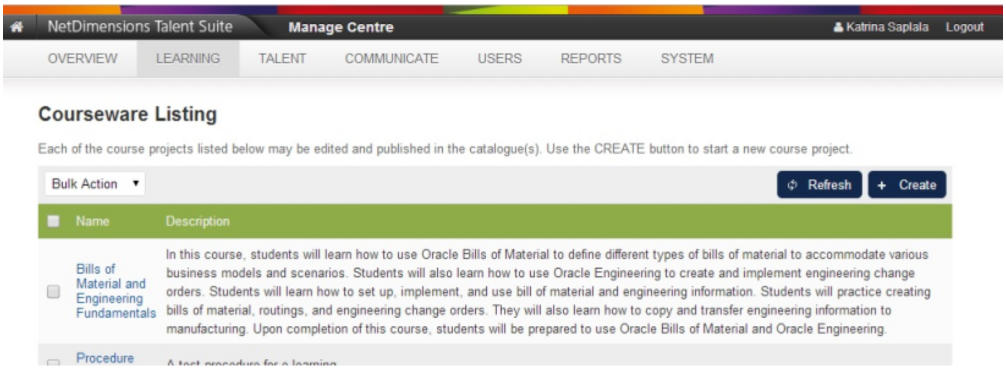
(applies to NetDimensions Performance, NetDimensions Learning, NetDimensions eLearning)

Introduction

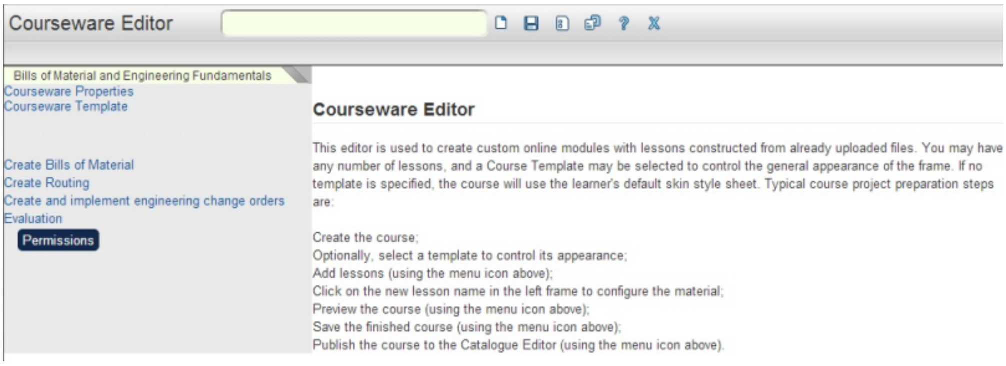
In the Talent Suite application, a Content Package is imported with an existing course id.

How does it work?

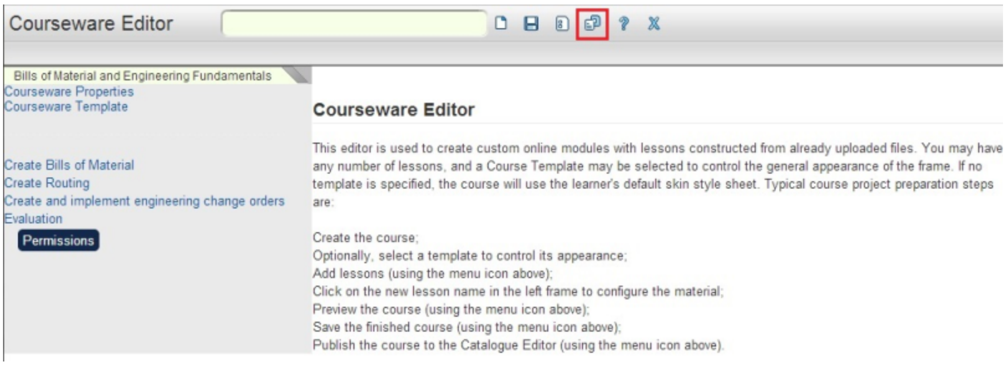
1.Create a new Courseware project or open an existing Courseware project in Courseware Editor. Click **Manage Center > Learning > Courseware Manager > Courseware Listing**.



2.Choose the name of the course project from the list that appears. The *Courseware Editor* screen appears.



3.Click the **Publish this Course** icon on the toolbar of the editor. This will take you to the following screen.



The system will automatically suggest a Course ID based on courseware project name. Specify an existing ID if you want this to be imported as a new revision of an existing course. System will automatically detect that the course ID you specified already exists and provide you with the following option. Selecting and option and clicking Publish will import the course in the Catalog Editor and provide the latest revision.

Class Resources Management

Class Resource Manager

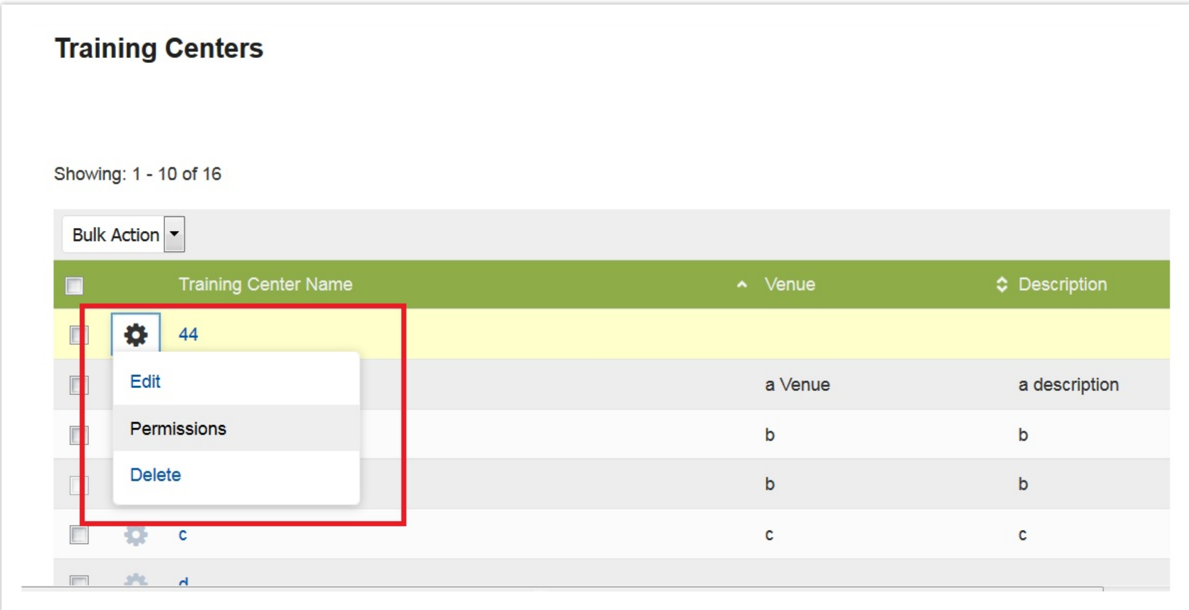
(applies to NetDimensions Performance NetDimensions Learning)

The LMS offers a comprehensive class resource management section that allows booking of rooms, instructors, and material such as projectors, whiteboards, notepads and the like. This is accessible under Manage Center > LEARNING > CLASS RESOURCE MANAGER. (Note that any double-booking of resources will be flagged.)

Training Centers

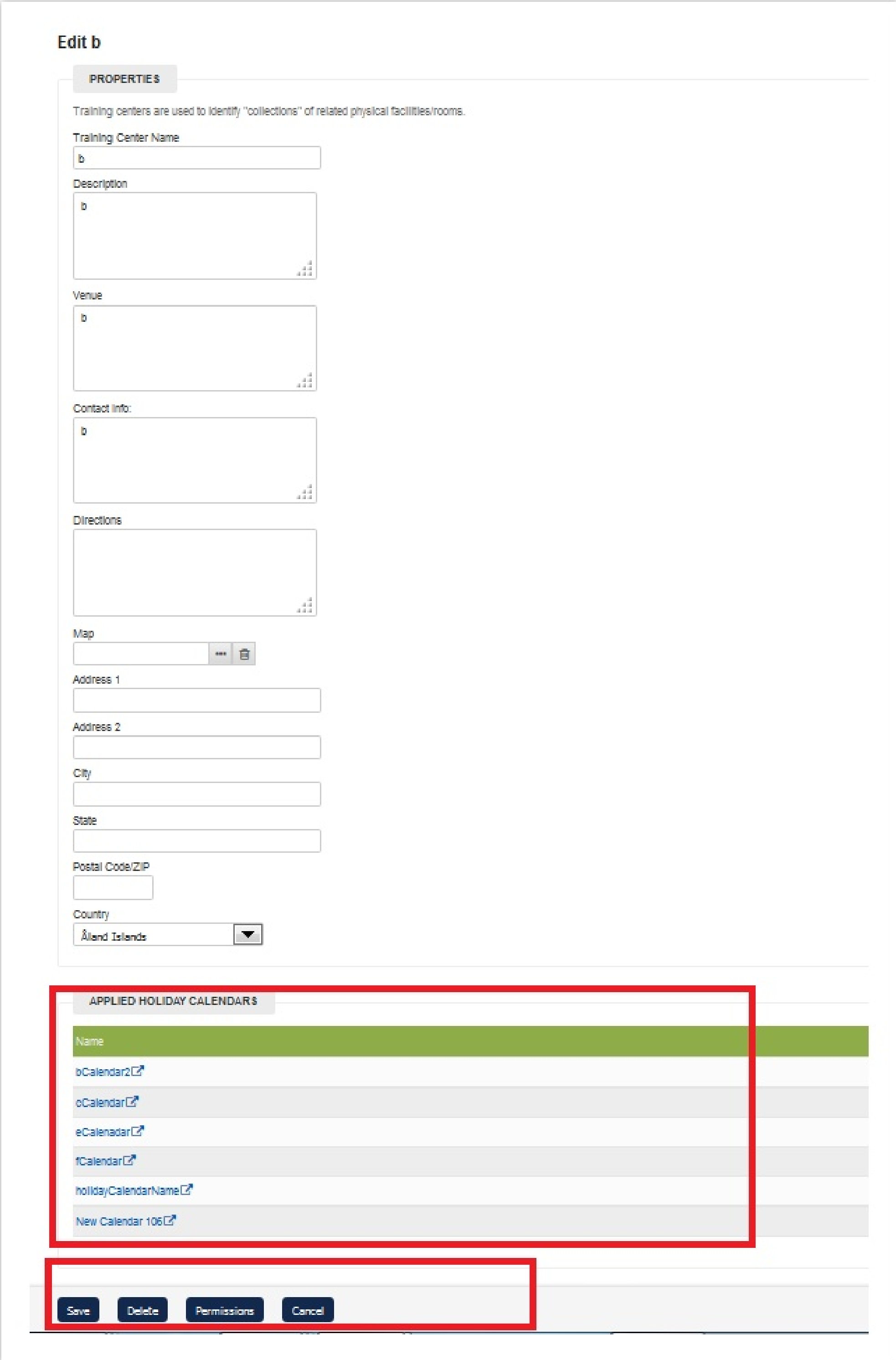
The Training Centers section can be found at Manage Center > LEARNING > CLASS RESOURCE MANAGER > Training Centers. Here, administrators are presented with a list of all Training Centers in the system with options to:

1. Edit the Training Center
2. Set Permissions
3. Delete



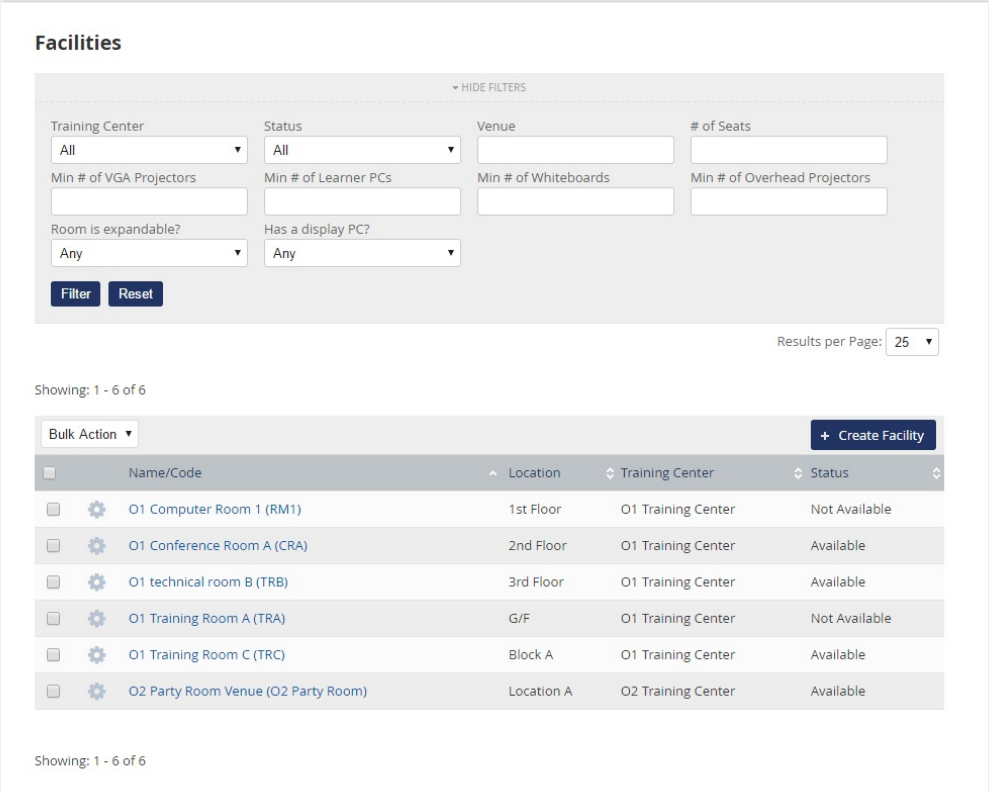
Training Centers have the following properties:

1. Training Center Name
2. Description
3. Venue
4. Contact Info
5. Directions
6. Map
7. Address
8. City
9. State
10. Postal Code/ZIP
11. Country
12. Applied Holiday Calendars


Edit b
PROPERTIES
Training centers are used to identify "collections" of related physical facilities/rooms.
Training Center Name
b
Description
b
Venue
b
Contact Info:
b
Directions
Map
Address 1
Address 2
City
State
Postal Code/ZIP
Country
Åland Islands
APPLIED HOLIDAY CALENDARS
Name
bCalendar2
cCalendar
eCalenadar
fCalendar
holidayCalendarName
New Calendar 106
Save
Delete
Permissions
Cancel

Facilities

The Facilities section can be found at Manage Center > LEARNING > CLASS RESOURCE MANAGER > Facilities:



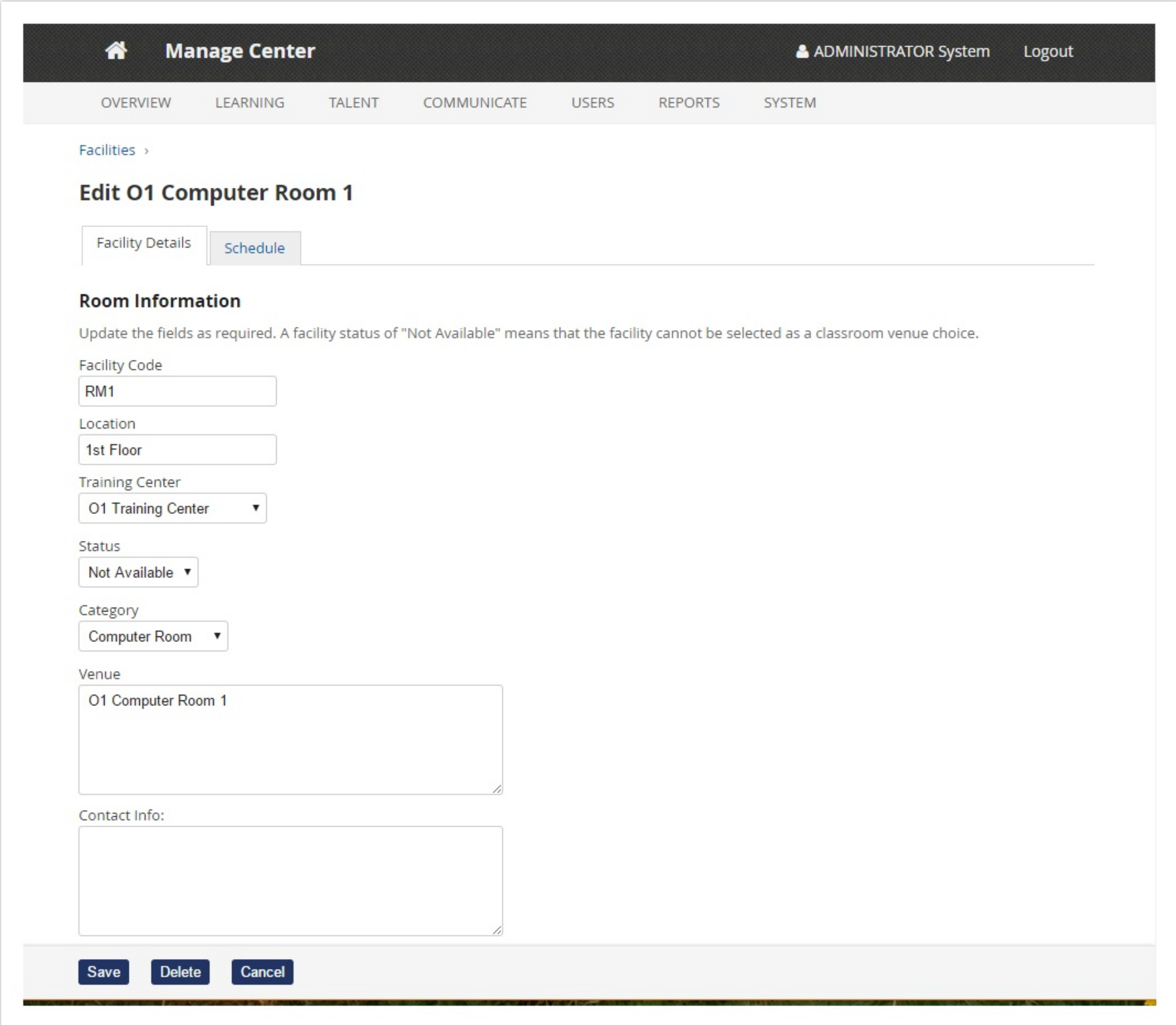
You may filter the list of facilities by:

1. Facility Code/Venue
2. Training Center
3. Status
4. Number of Seats
5. Minimum Number of VGA Projectors
6. Minimum Number of Learner PCs
7. Minimum Number of Whiteboards
8. Minimum Number of Overhead Projectors
9. Is Room expandable?
10. Has a display PC?

These filters are also available when using the Facility Selector in other areas of the system.

Depending on access control and permissions, you can:

1. Edit a Facility
2. Delete Facilities, individually or in bulk



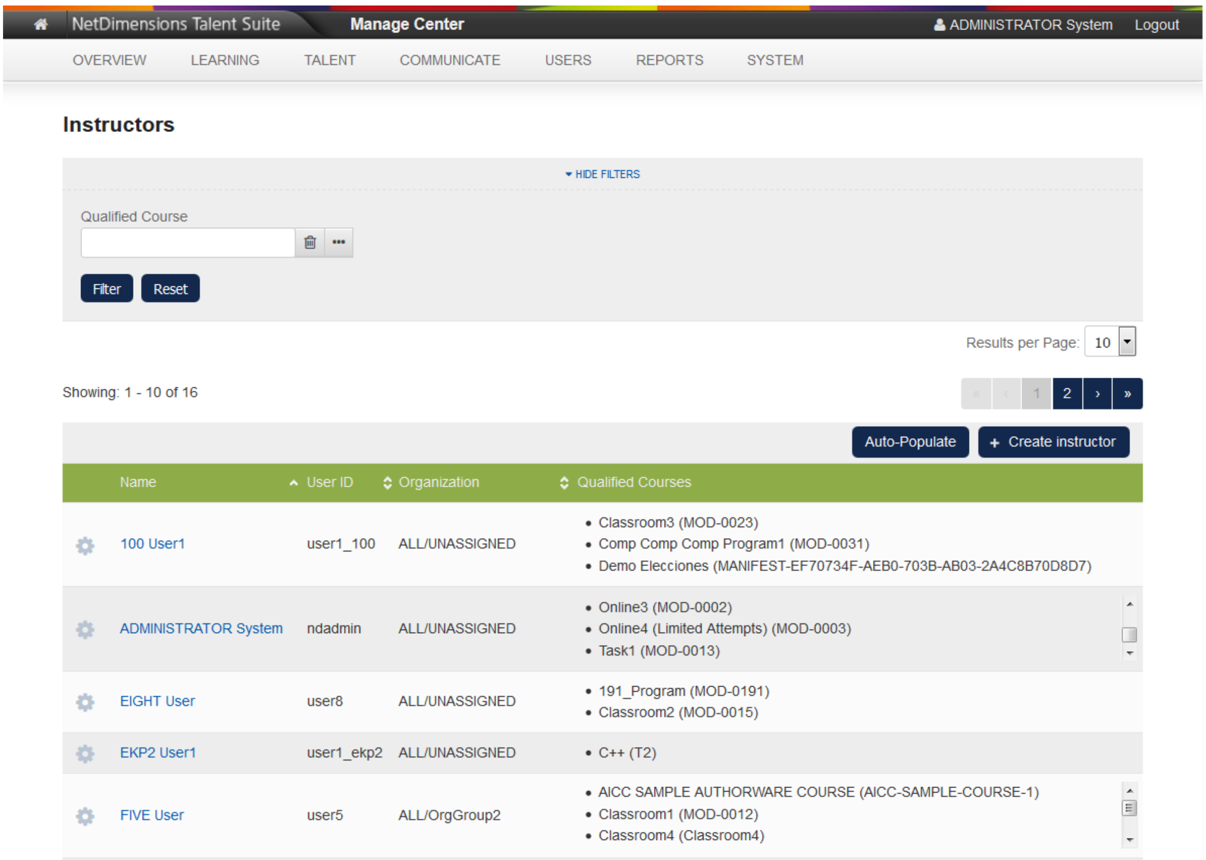
Facilities have the following properties:

1. Facility Code
2. Location
3. Training Center
4. Status
5. Category
6. Venue
7. Contact Info
8. Directions
9. Map
10. Expandable
11. Moveable Seating
12. Has a display PC?
13. Video Conferencing
14. Minimum # of Seats
15. Maximum # of Seats
16. # of VGA Projectors
17. # of Monitors
18. # of Overhead Projectors
19. # of Learning PCs
20. # of Whiteboards
21. # of Interactive Whiteboards

Instructors

The Class Resource Manager allows you to assign Instructors to learning modules they are certified to teach, Instructors are managed at Manage > LEARNING > CLASS RESOURCE MANAGER > Instructors, where you can:

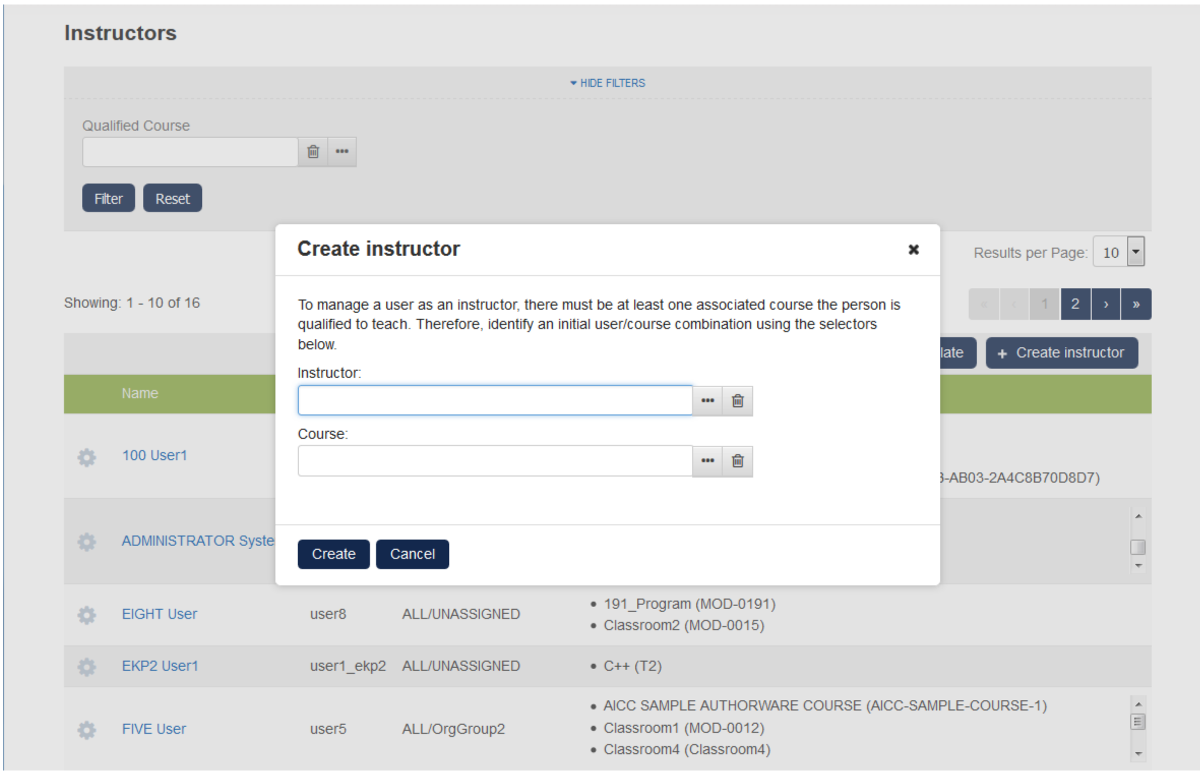
1. Create an Instructor
2. Auto-Populate Instructors
3. View an Instructor's Profile
4. Edit an Instructor's Qualified Courses
5. View an Instructor's Schedule



There is a Qualified Course filter at the top of the page which allows filtering of Instructors based on courses.

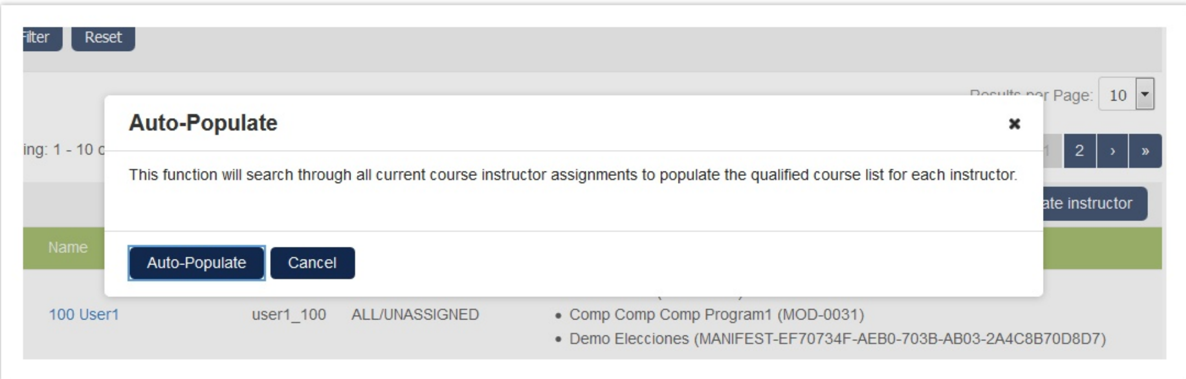
Creating An Instructor

To create a new Instructor's profile, click on the *"Create Instructor"* button and enter the necessary information:

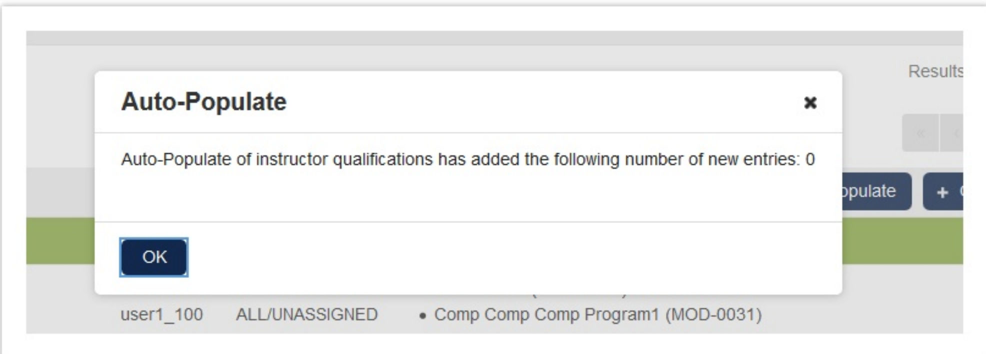


Auto-Populating Qualified Instructors

An Auto-Populate button allows users to automatically create instructors based on current module session instructor assignments:

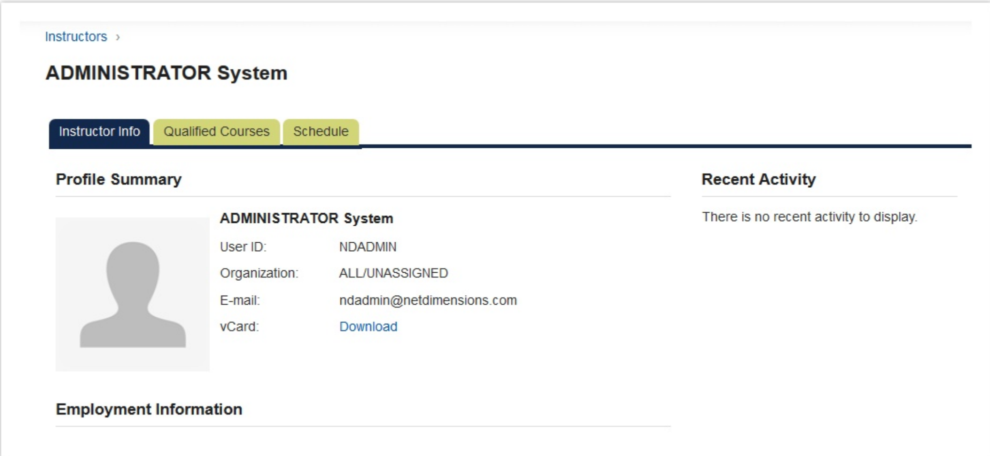


Another dialogue box will appear indicating if there are any new entries from that search.



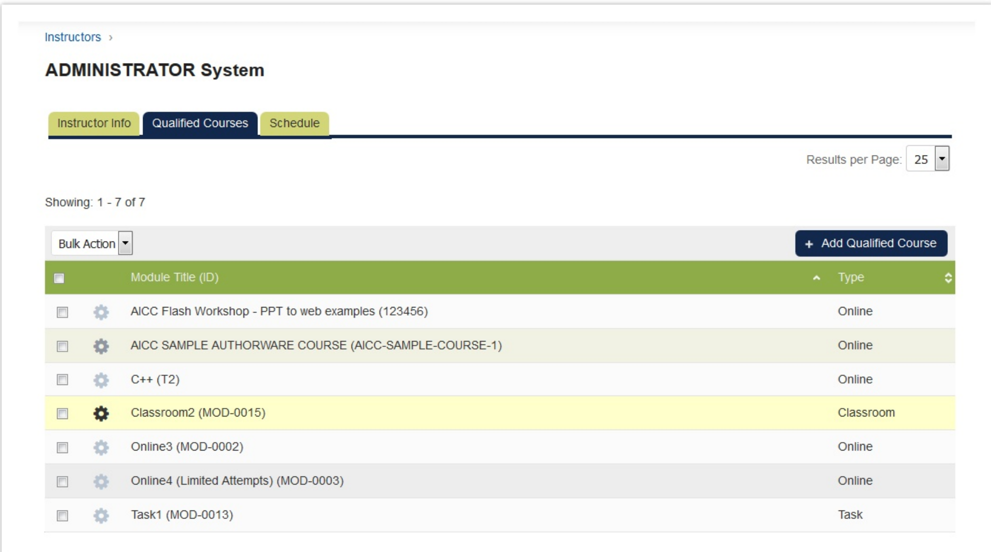
Viewing Instructor Profiles

Clicking on an Instructor will open the Instructor's Profile:



Editing an Instructor's Qualified Courses

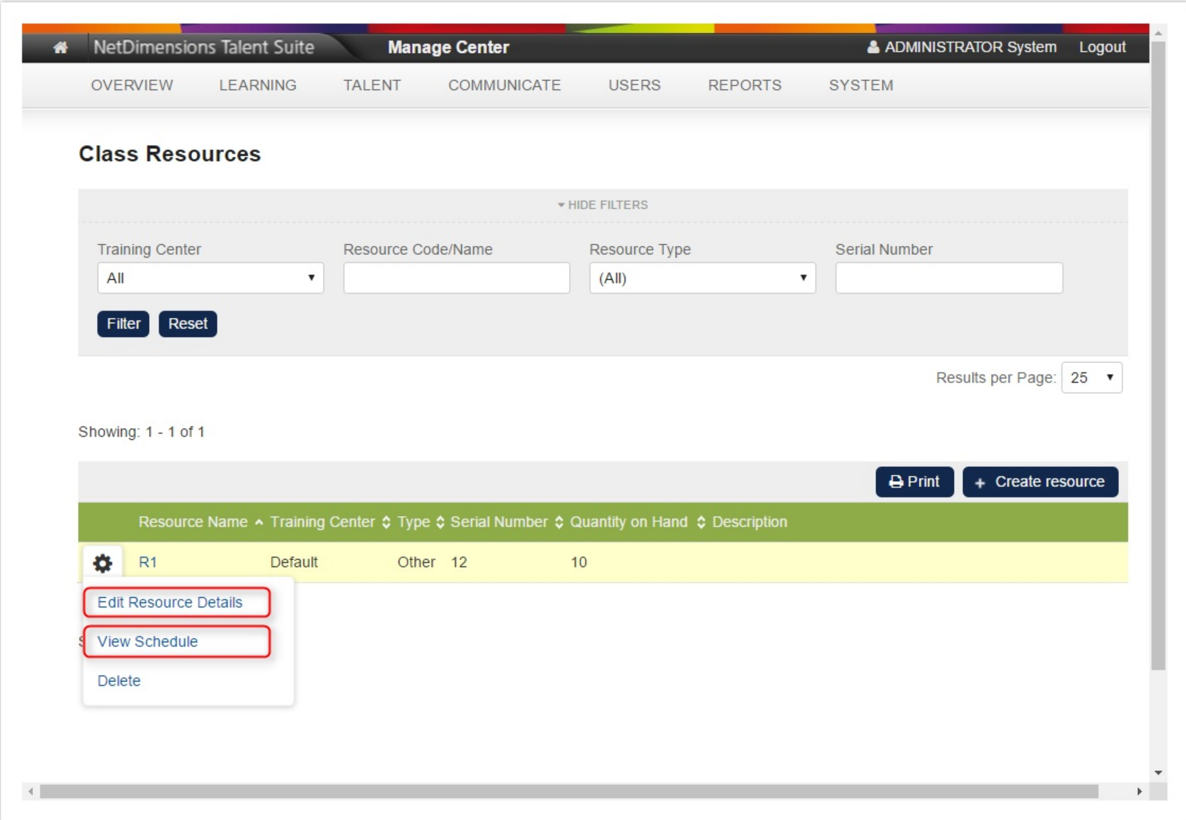
Clicking the "Qualified Courses" tab brings up the page for all courses listed for that Instructor. If there is any need to do further editing for each of those courses, it can be done here.



Resources

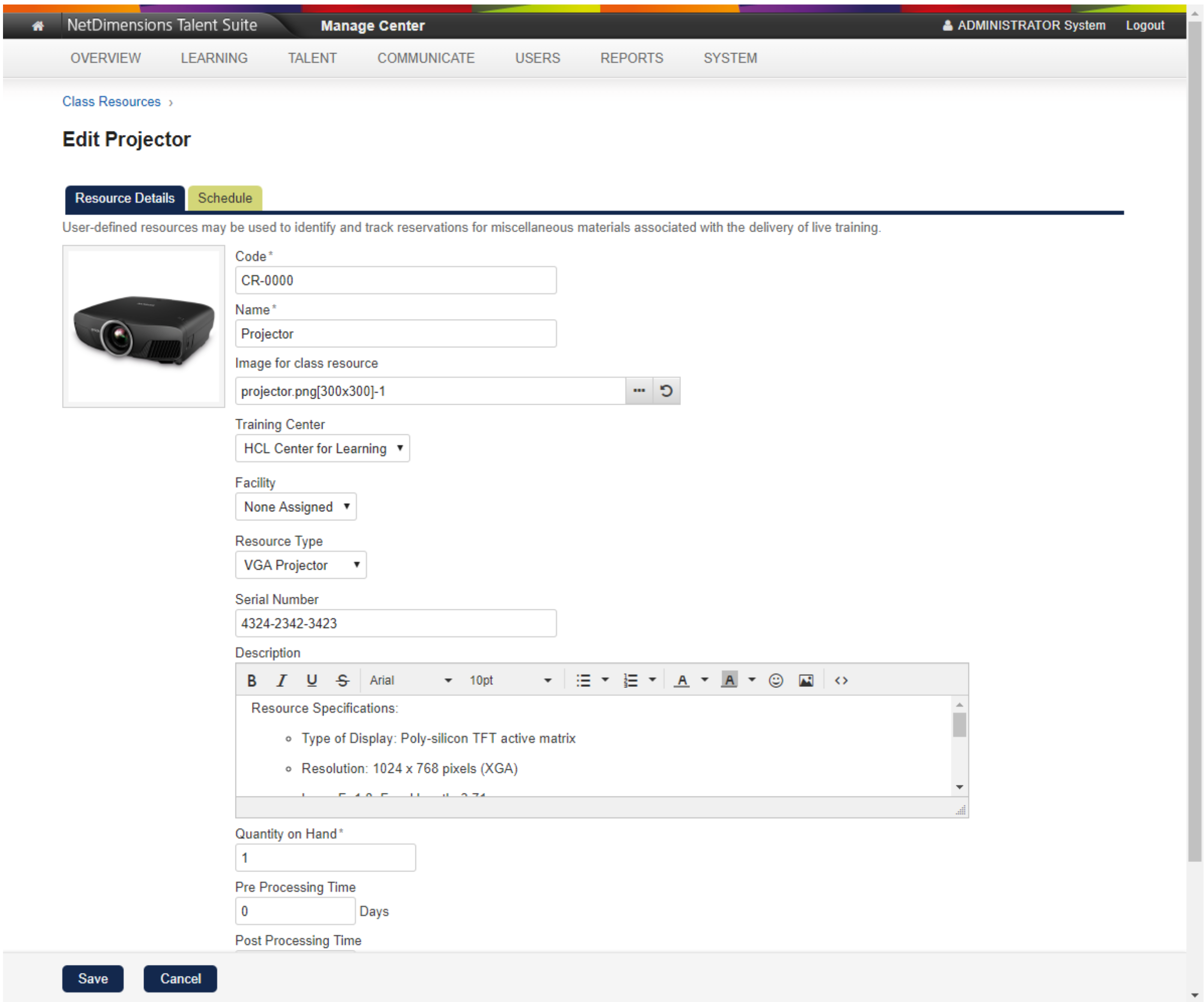
In addition to the standard resources listed on the facilities screen, you can add your own as needed. T hese are managed at Manage Center > LEARNING > CLASS RESOURCE MANAGER > Class Resources, where you can:

1. Create a Resource
2. Edit Resource Details
3. View Resource Schedule
4. Delete a Resource



Class Resources have the following properties:

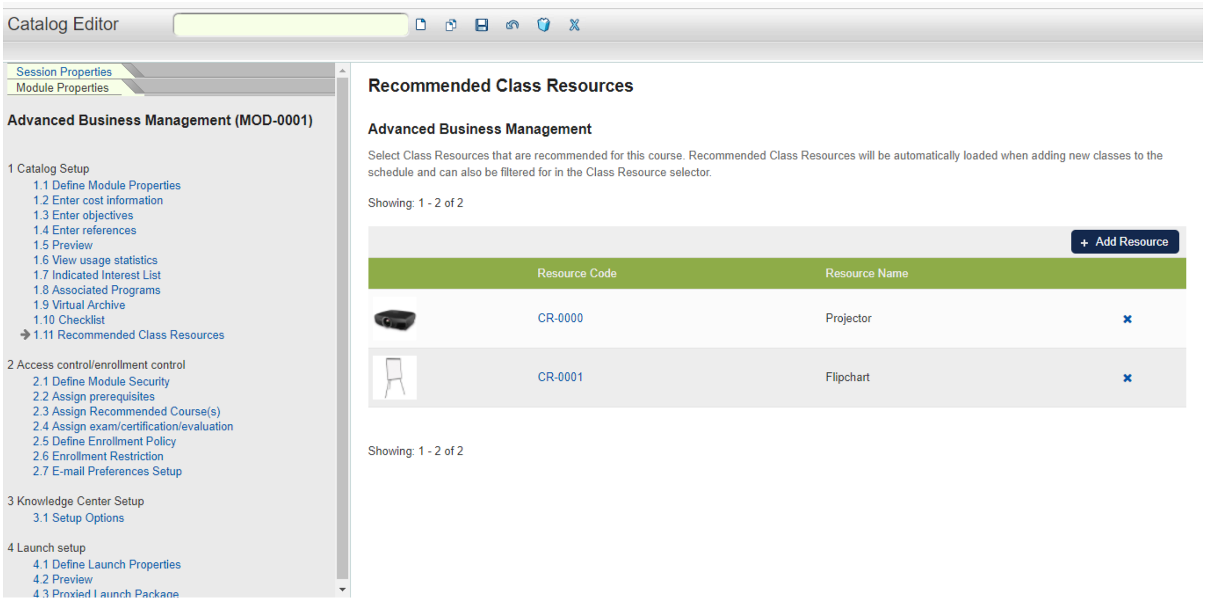
1. Code (Unique Identifier)
2. Name
3. Image
4. Training Center
5. Facility
6. Resource Type
7. Serial Number
8. Description
9. Quantity on Hand
10. Pre Processing Time
11. Post Processing Time



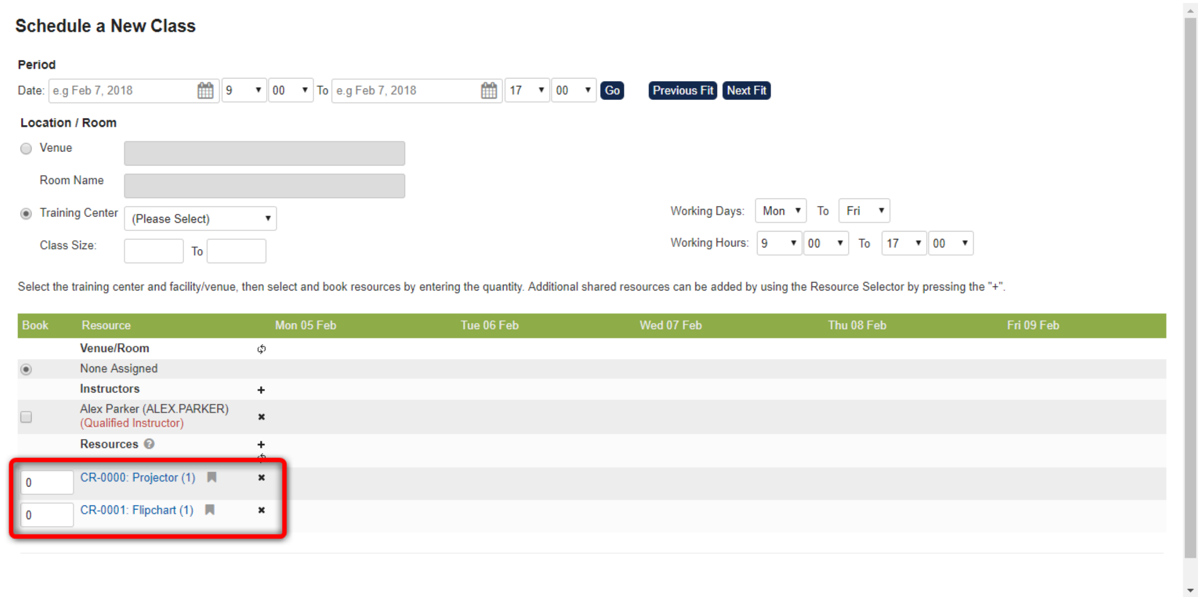
Recommended Class Resources

If some resources are required for all classes in a session and all sessions in a module, they can be configured to be automatically loaded when setting up classes for sessions. To set up these "Recommended Class Resources" for a course:

1. Open the module in the Catalog Editor.
2. Go to Module Properties > Recommended Class Resources.
3. Select the Class Resources that are likely to be required for each session:



The Recommended Class Resources will then automatically loaded for quick selection when adding a class to the session schedule:

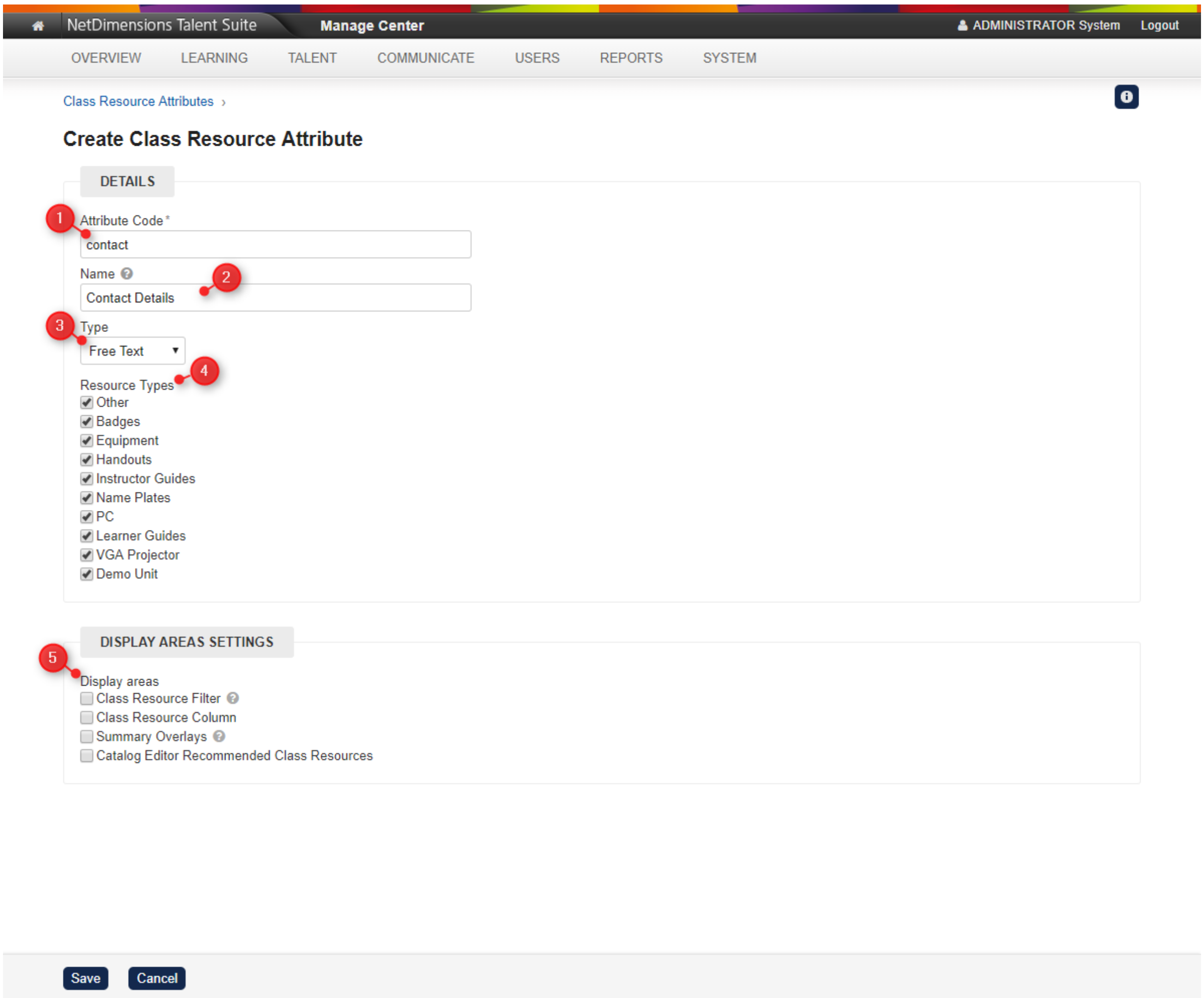


The Recommended Resources for a given course are also retrievable in the Resource selector (e.g. at the Resource Planner).

Class Resource Attributes

Class Resource Attributes can be used to capture the general properties of the resources. To set up, specify:

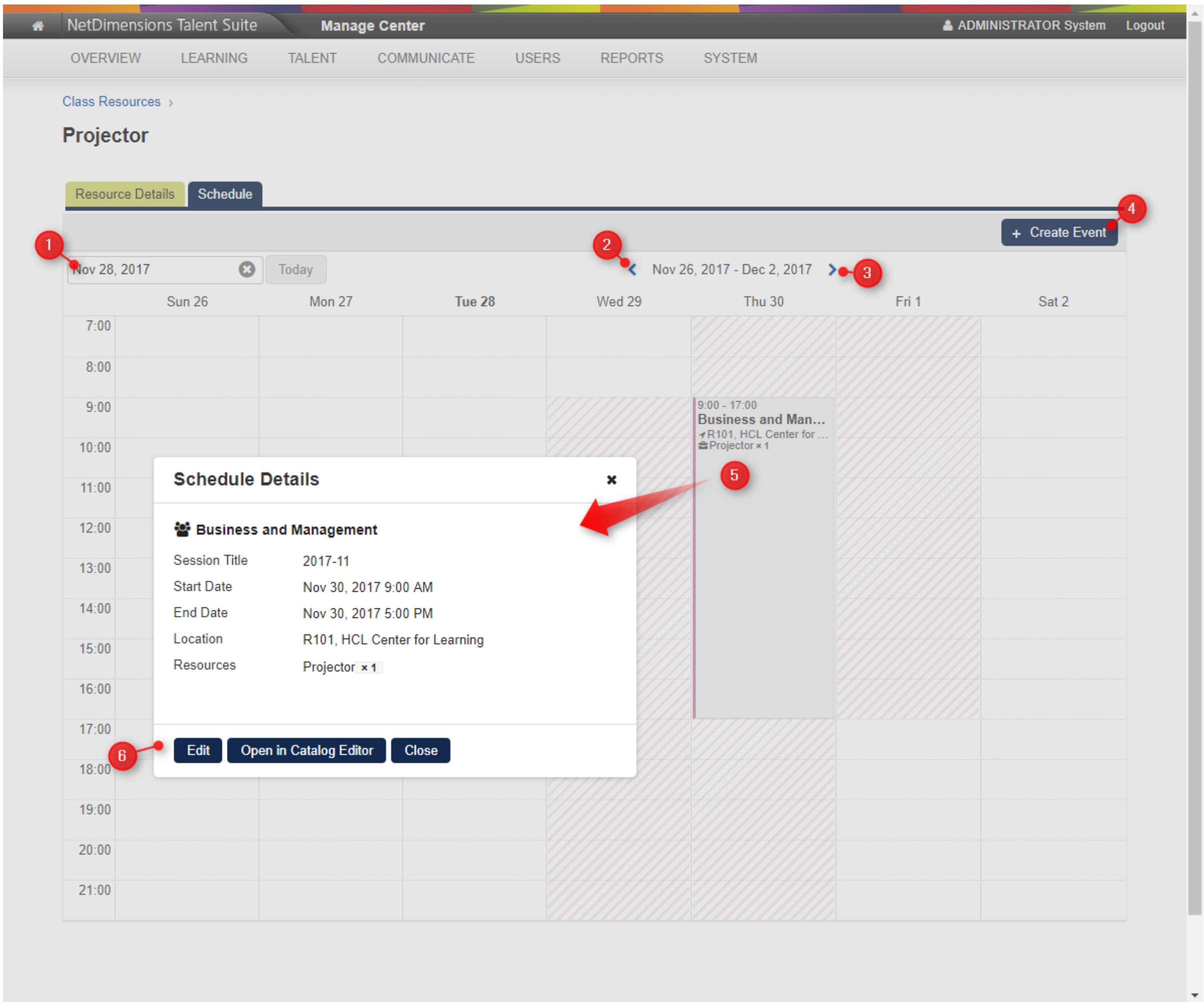
1. A Unique Code
2. A Name
3. The type (Free Text, Text Area, Drop Down, Numeric, Checkbox, Date, or File Selector)
4. Resource Types to which the attribute applies
5. Display Areas in which the attribute should appear



Facility, Instructor, and Resource Schedules

Viewing Schedules

Schedules for each Facility, Instructor, and Resource are accessible in their own Schedule tab under Class Resources. Bookings are displayed as blocks in a calendar with hatched blocks representing processing time for resources, if configured:



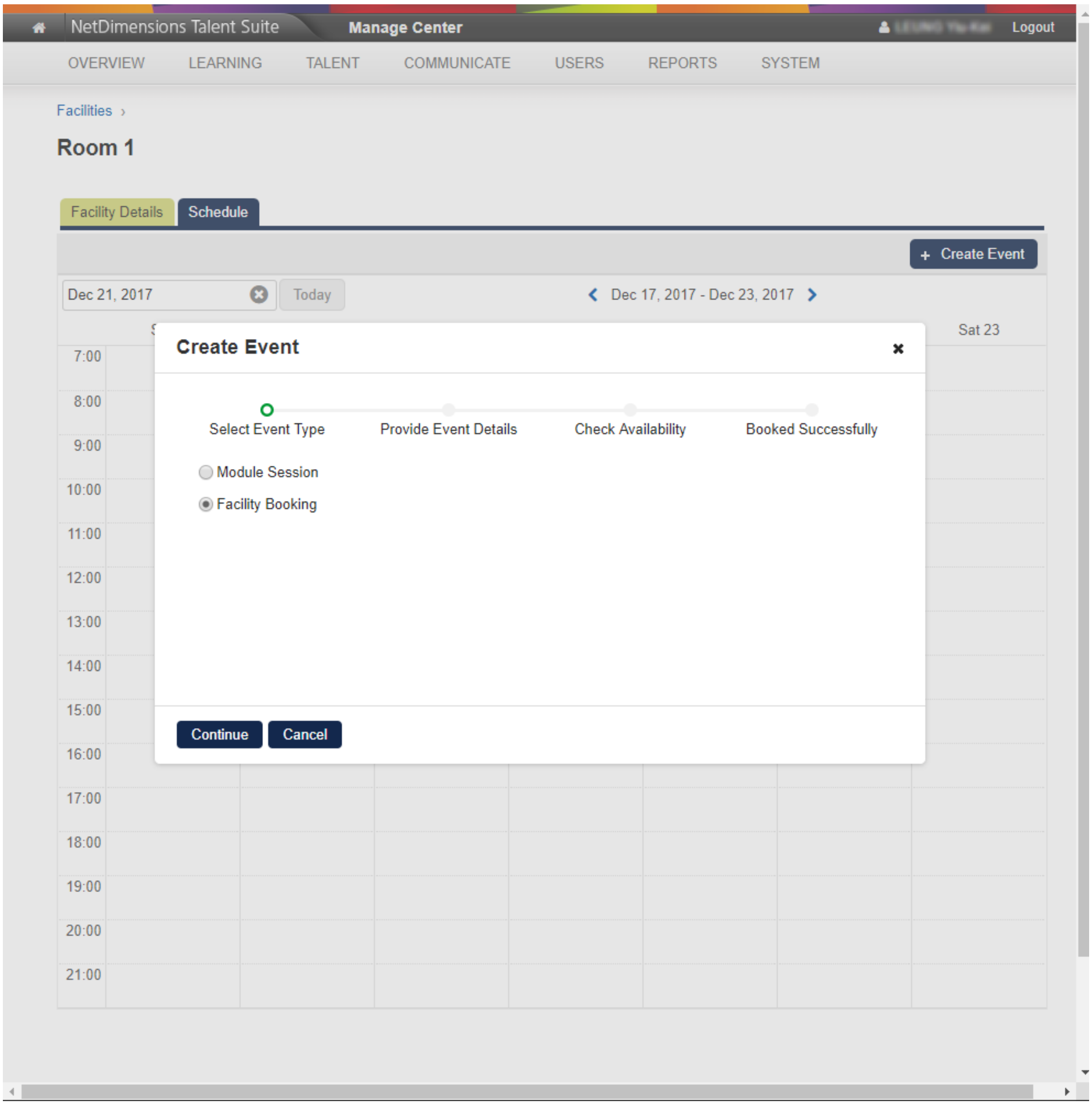
From here, the Administrators can

1. Jump to bookings in a specific week from the calendar
2. View bookings in the previous week
3. View bookings in the following week
4. Create an event
5. Click on an event chip to see further details in an overlay window
6. Depending on access controls, permissions, and object types
    a. Open the event in Catalog Editor
    b. Edit (and Delete) the event

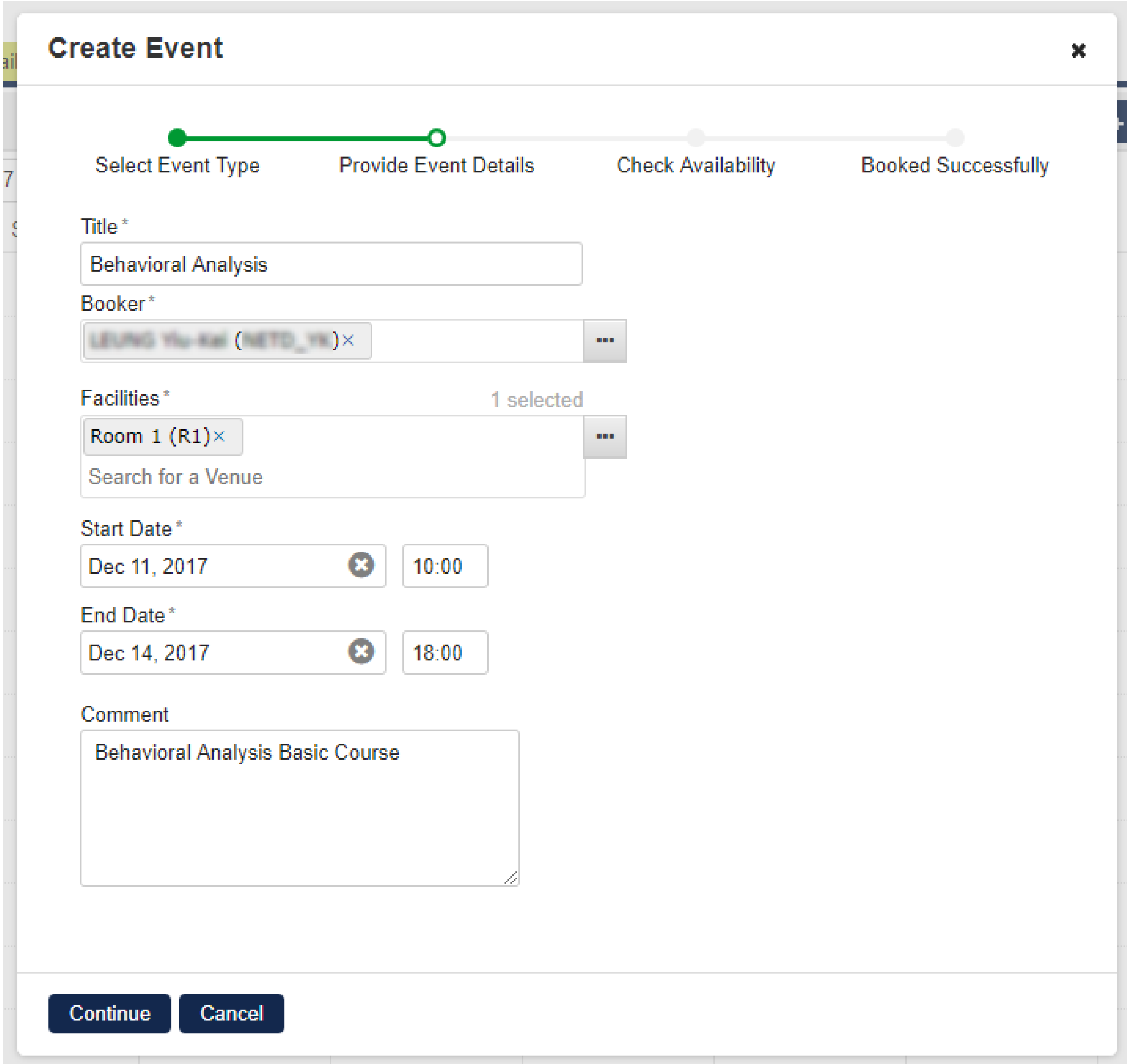
Creating Events

You can create events under the "Schedule" tab for *Class Resources*, *Facilities* and *Instructors*. For example, to book a room only that is not linked to any training session:

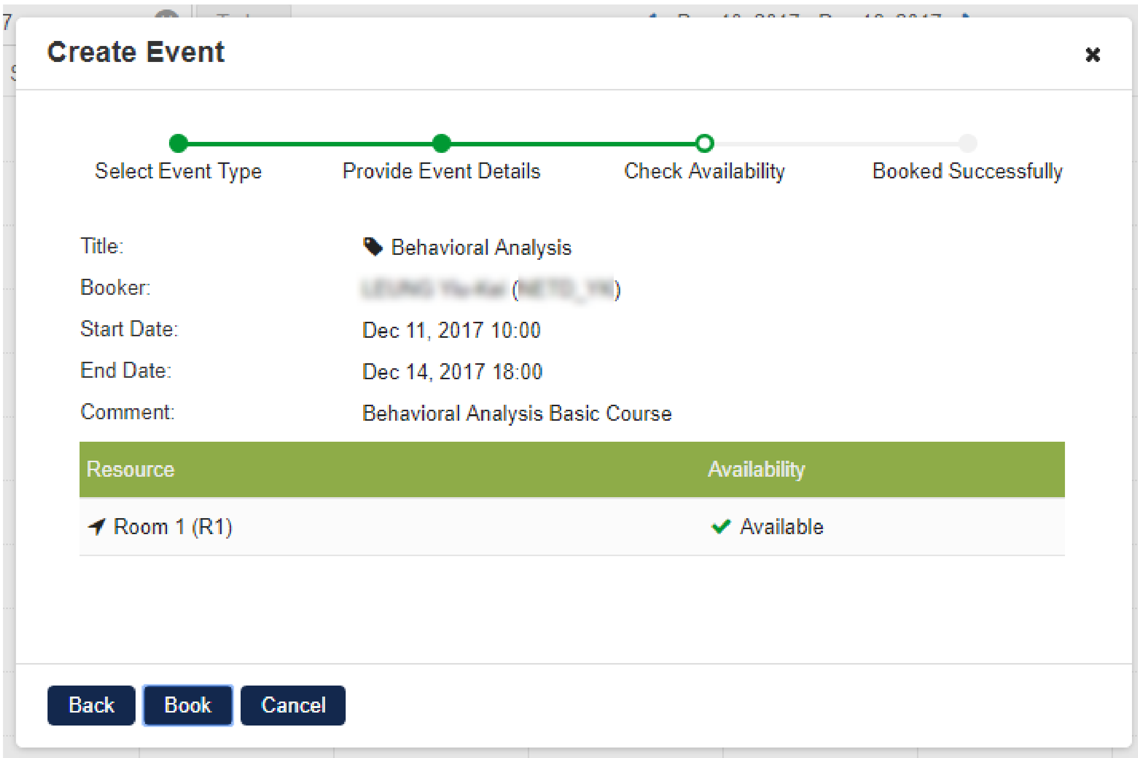
1. Click **Create Event** or the cell corresponding to the desired start time.
2. Select "Facility Booking" Event Type:



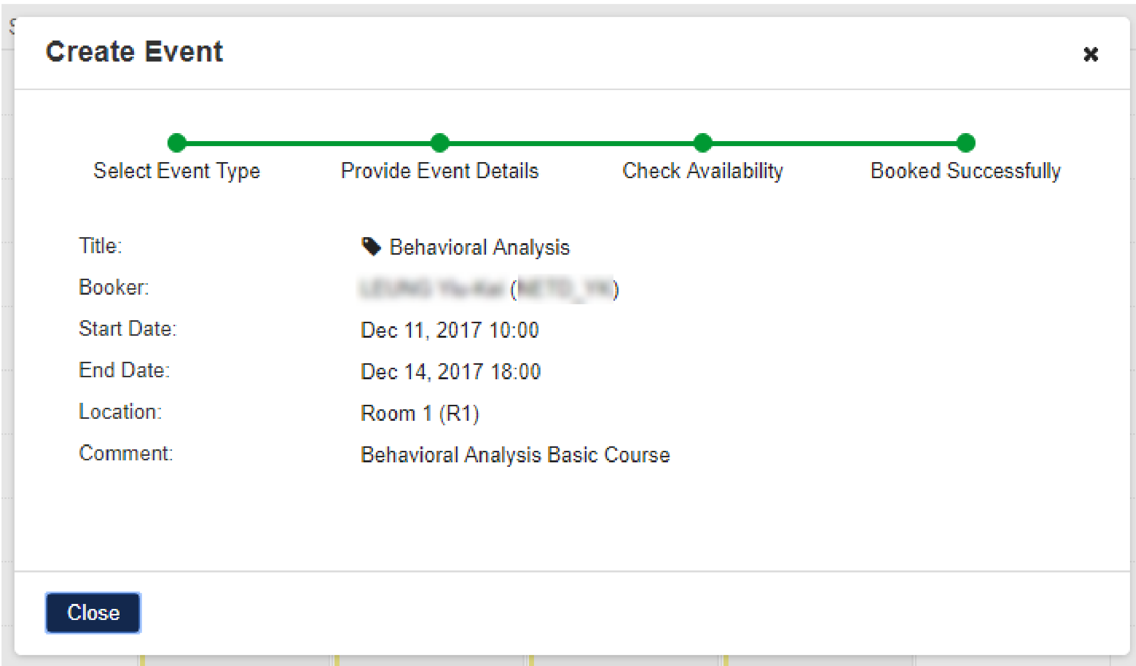
3. Provide the "Facility Booking" Event Details.



4. Check Availability and Confirm



5. View Event Summary.



Similar "Create Event" flows are available for Instructor Personal Events and Class Resource Bookings.

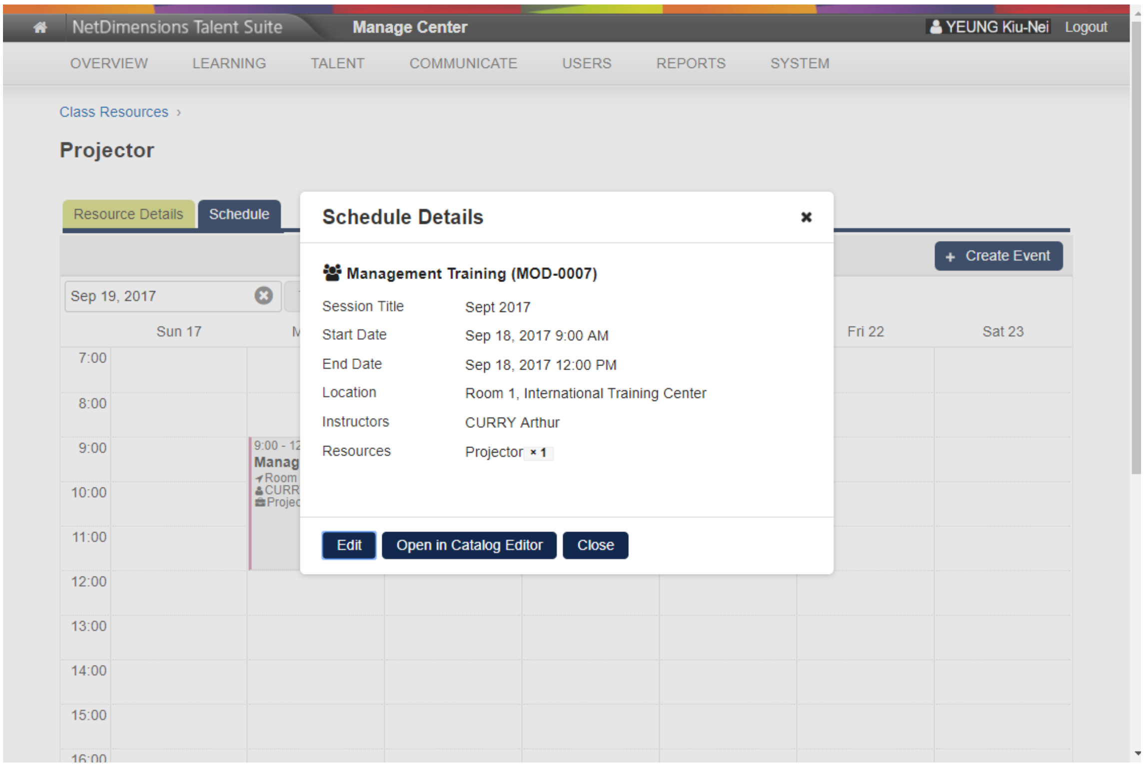
Editing Events

The flow for editing events for *Class Resources*, *Facilities* and *Instructors* is very similar to creating an event. The following editing methods are available: *Direct Editing* and *Drag and Drop Editing*.

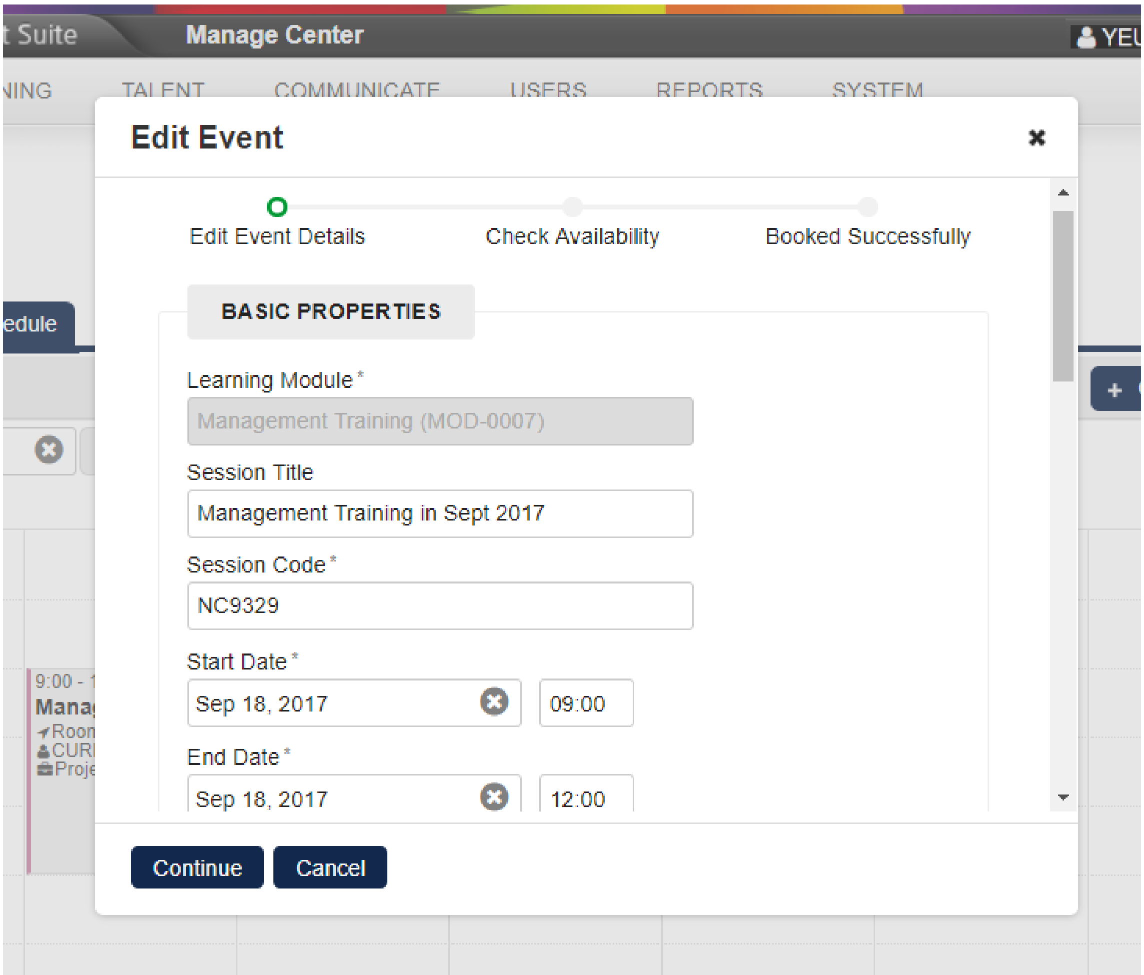
Direct Editing of Events

Events can be edited by clicking them directly in the Calendar. For example, to edit a Module Session event for a *Class Resource:*

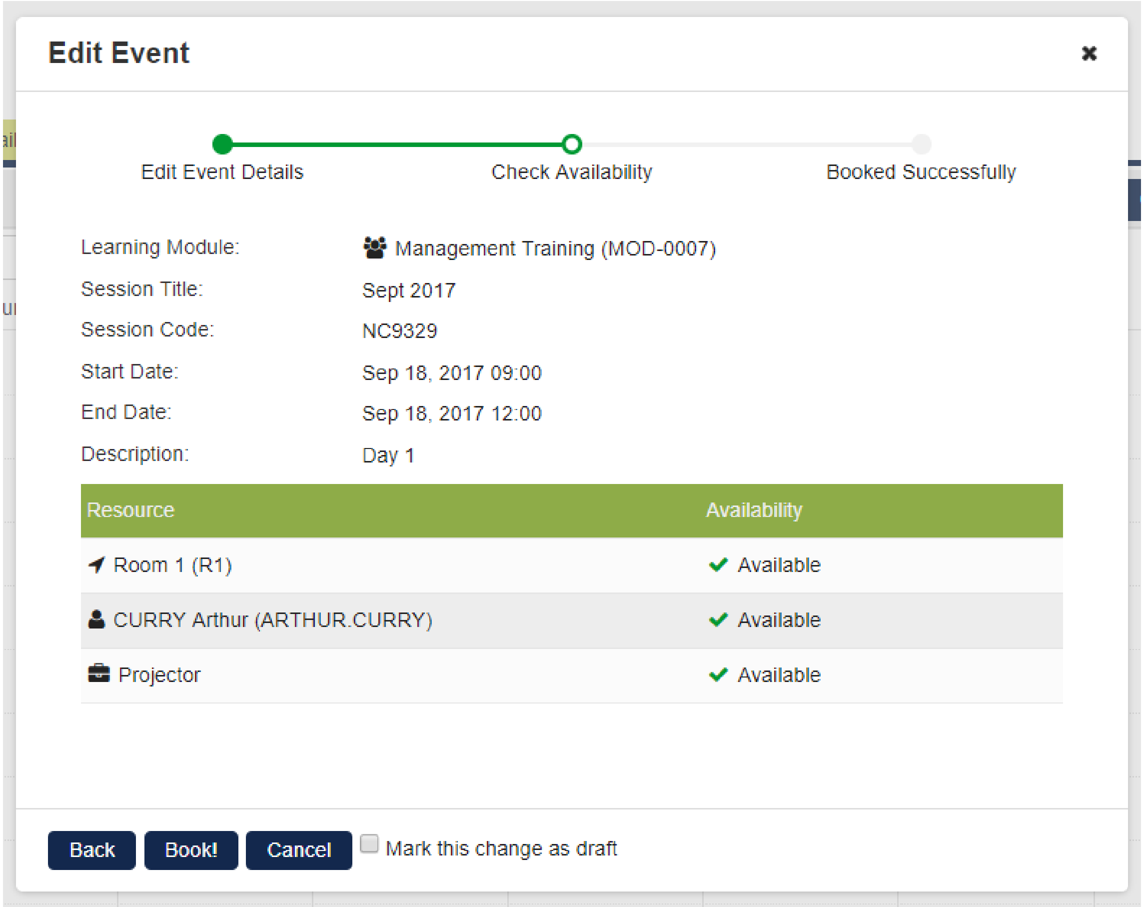
1. Click on the Module Session event block to launch the Schedule Details
2. Click **Edit** in the overlay window:



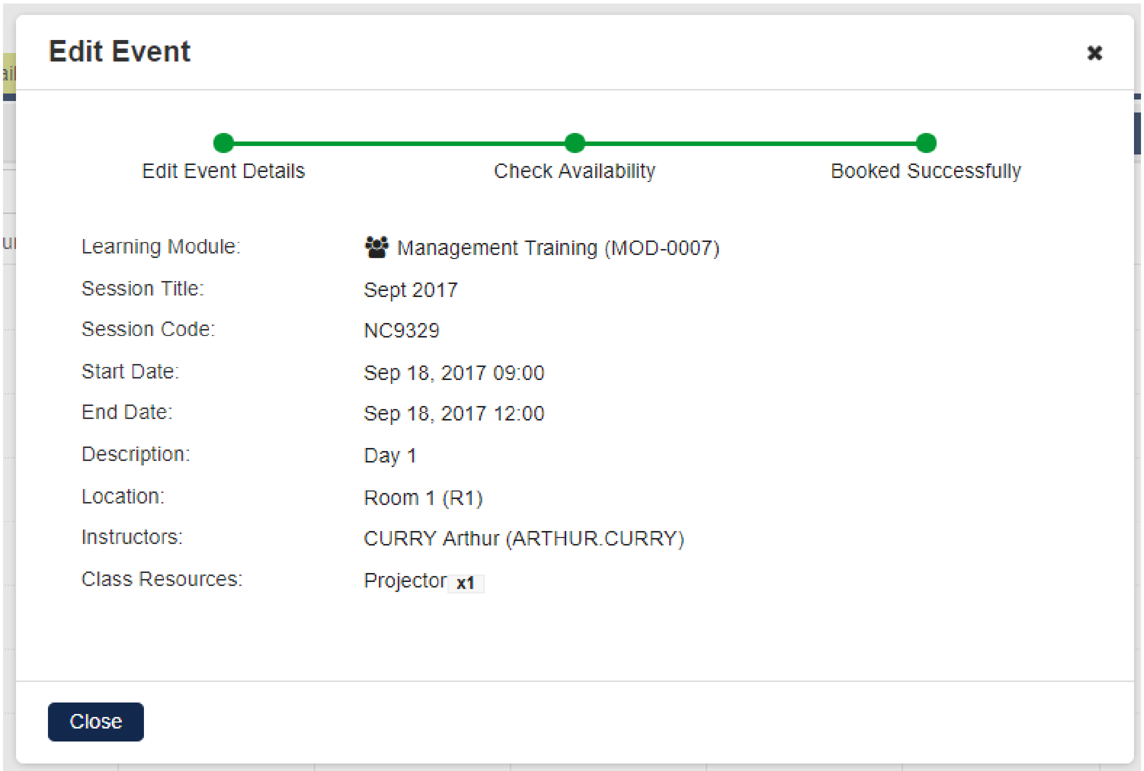
3. Edit the event properties. Click **Continue** to proceed.



4. If you would like to make more changes before saving, check the "Mark this change as draft" checkbox (see next section for more details). Click **Book** to confirm the changes.



5. Click **Close** to exit.

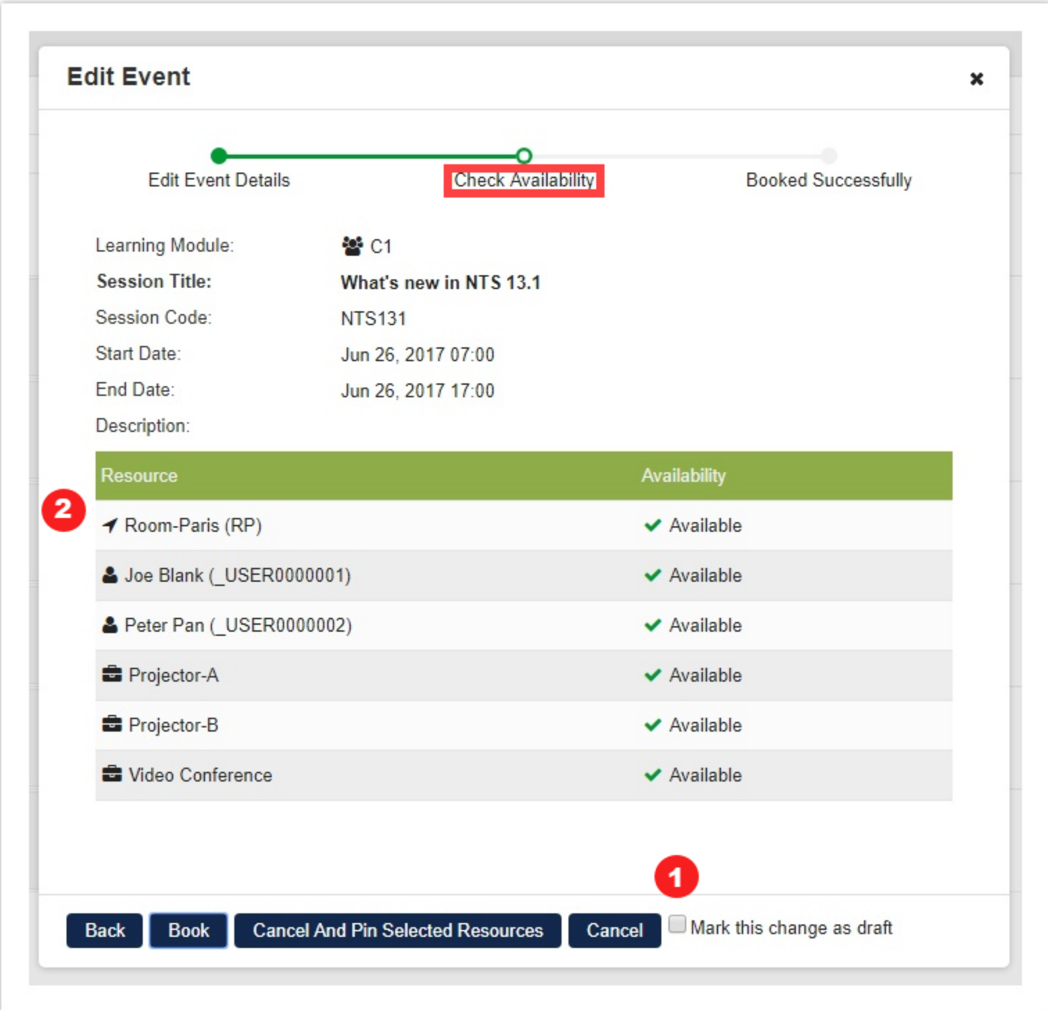


Similar direct editing flows are available for **Instructors** and **Facilities**.

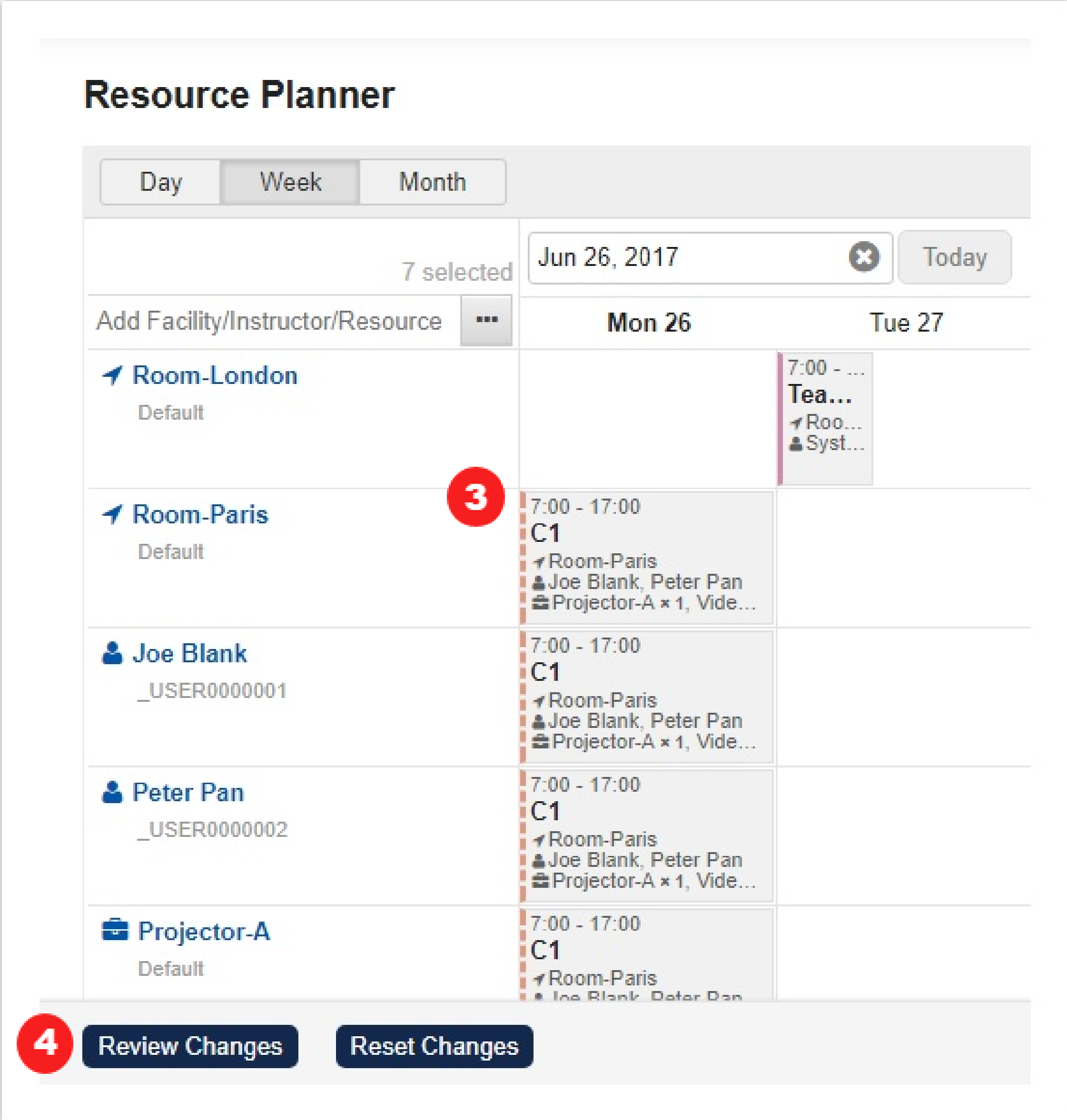
Drafting Changes for Module Sessions

Sometimes the Administrators may need to make a number of changes to the events, review them, and then repeat this "change and review" process before saving, especially when working on active sessions. The **Mark this change as draft** Function can help with this.

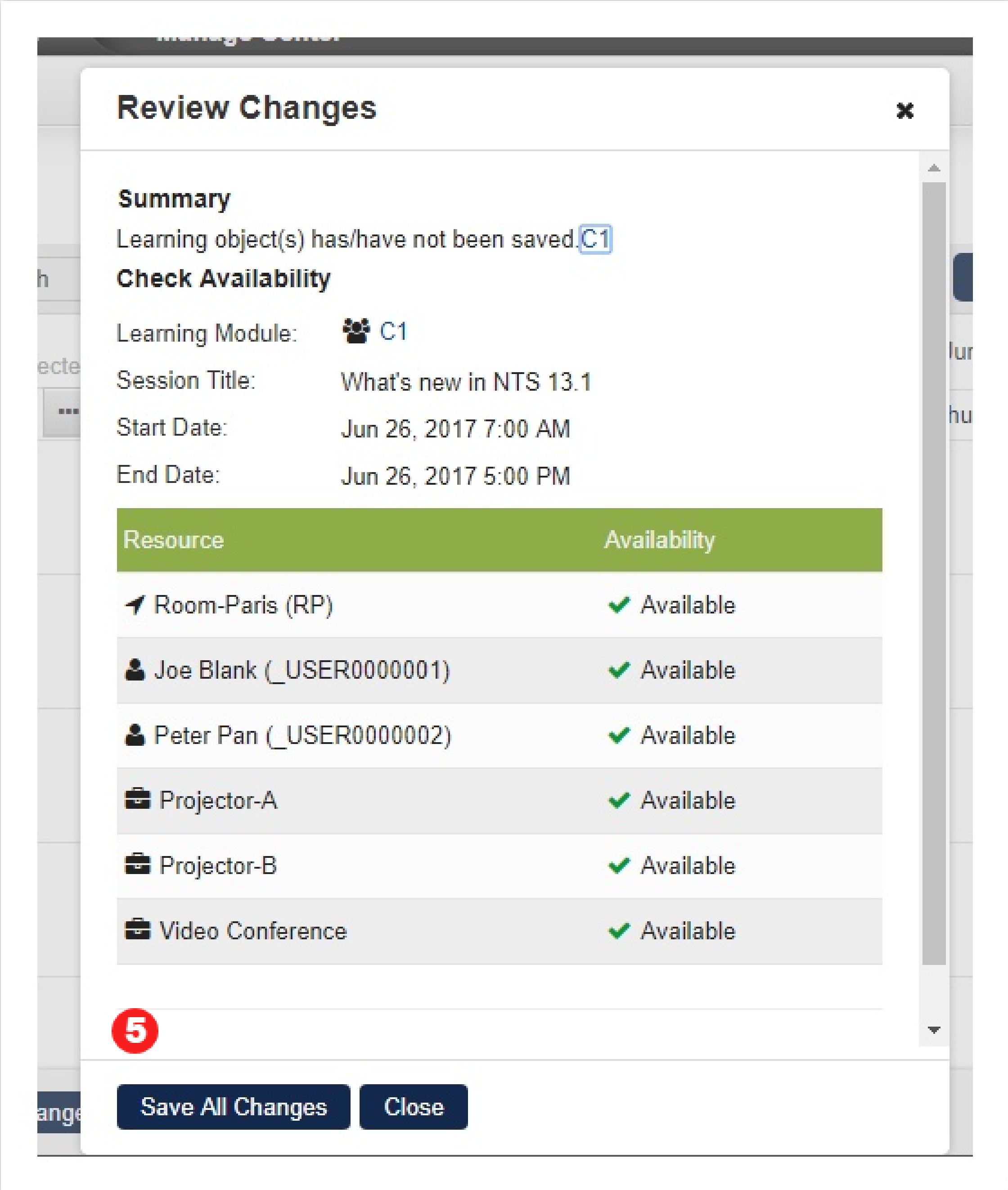
1. When editing Module Session events during the *Check Availability* step, invoke the "Draft Mode" by
    a. Making a change in the Catalog Editor without saving, OR
    b. Checking "**Mark this change as draft**" before clicking **Book**:



2. Once in this mode, all subsequent changes to any Module Session events will be put into the System's temporary memory until the Administrator saves.
3. These drafted changes will be highlighted with a dashed line.
4. The **Review Changes** and **Reset Changes** Buttons will appear in the Draft Mode:



5. The Administrator can review the events in the corresponding dialog box after clicking **Review Changes**.



6. To save the drafted changes, either click **Save All Changes** in the **Review Changes** dialog, or **Save in Catalog Editor** by individual learning objects.
7. Draft changes will be discarded when the Administrator:
    - Clicks **Reset Changes** on the action bar;
    - Clicks **Reset in Catalog Editor** (by individual learning objects);
    - Logs out; or when the current login session expires.

Drag and Drop Editing of Events

Administrators can edit events by drag-and-drop directly. Event chips can be dragged to update the date range, start and / or end time(s) of an event, and they can be resized to update the duration of an event. (However, resource reservation, and read-only events **cannot** be edited in this way.)

Depending on access controls and permissions, Facility, Instructor, and Class Resource events can be changed to another date, start or end time by drag-and-drop. To do so, drag and drop:

- The whole chip to another date; or
- The start / end time to another position.

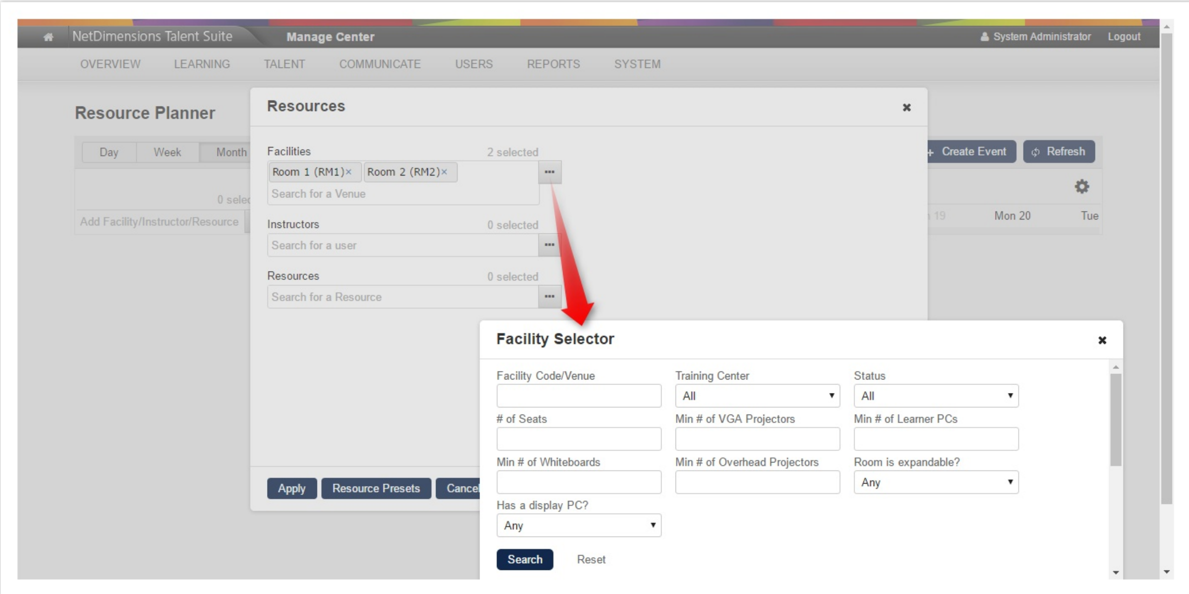
The System will then ask for confirmation. Drag and drop the event again for further change(s) if necessary.

Resource Planner

lThis section allows users to get an overview of facility and resource schedules as well as instructors.

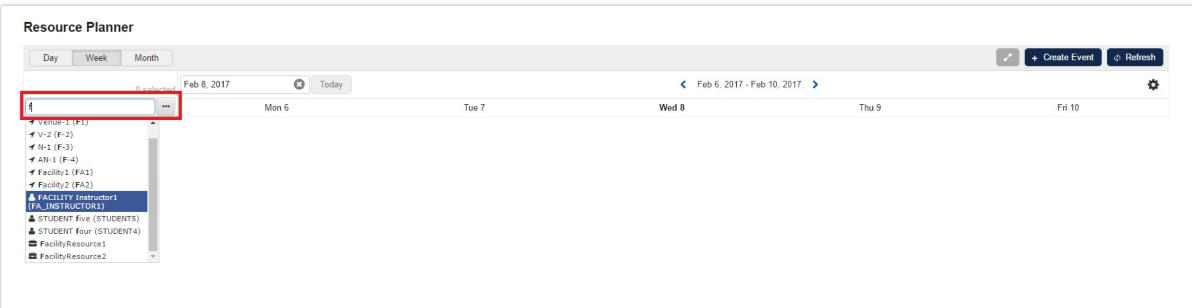
Selecting Resources at Resource Planner

On the first arrival at the Planner, a dialog will prompt users to select the facilities, instructors and resources they want to see. Selection can be made inline by typing directly into the text field or can be made via Advanced Selectors accessible through the respective "..." button:

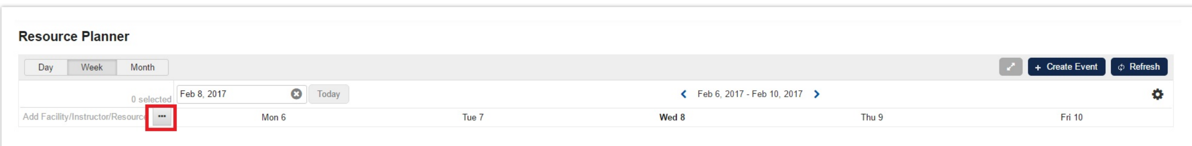


The selection will be saved to the user session on clicking "Apply" and will remain in effect until the user logs out.

Once the schedules have been loaded in the planner, you can add to the list of resources by typing directly into the quick selector at the top left-hand corner of the Planner:

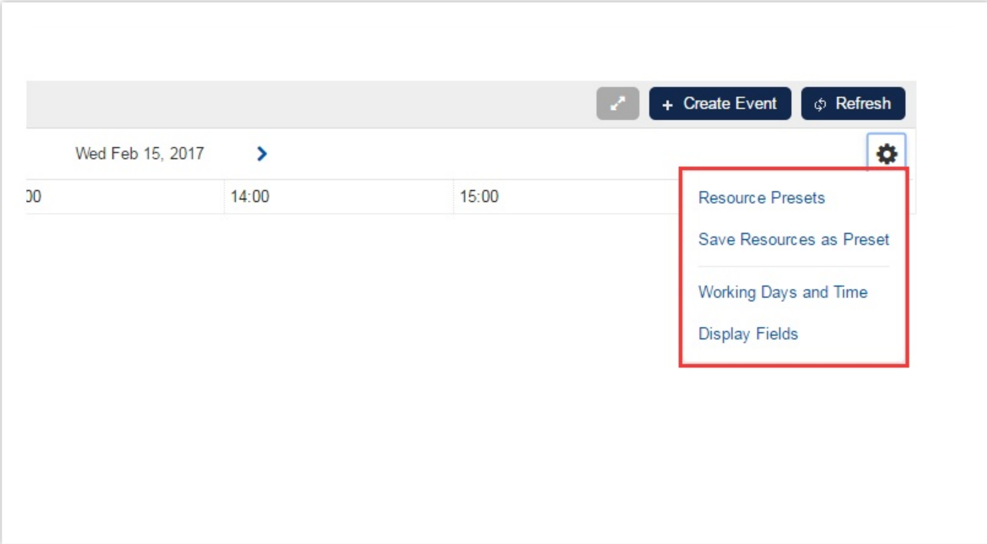


The Resource Selection dialog and Advanced Selectors are accessible via the "..." button next to the quick selector:

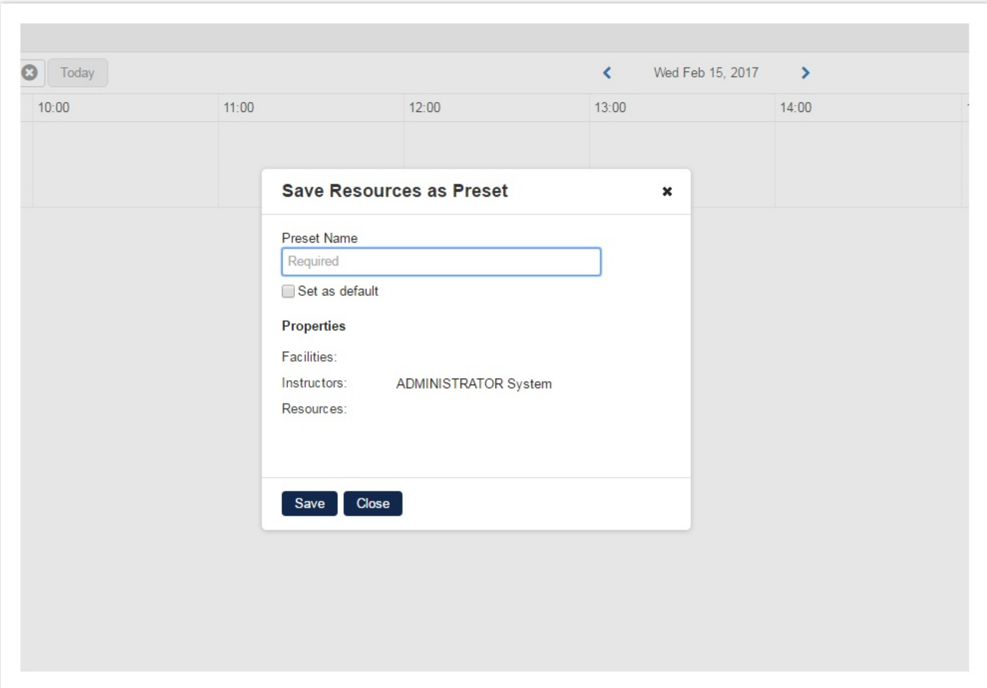


Resource Planner Presets

There are likely to be sets of Resources that need to be referred to time and time again. In this situation, each set of Resources should be saved as a Resource Preset. Having loaded the schedules of the set of resources into the planner, a Preset can be created via the "Save Resources as Preset" under the menu:

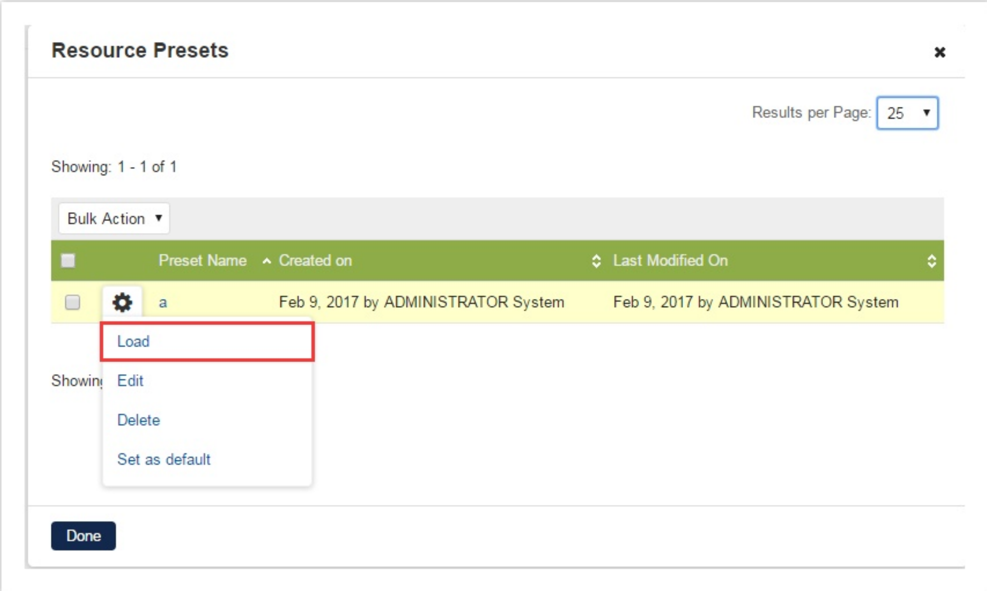


You will then be prompted for the Preset Name and if applicable, set the Preset as the default - if enabled, this Preset will load automatically on the first visit to the Planner in a given login session.

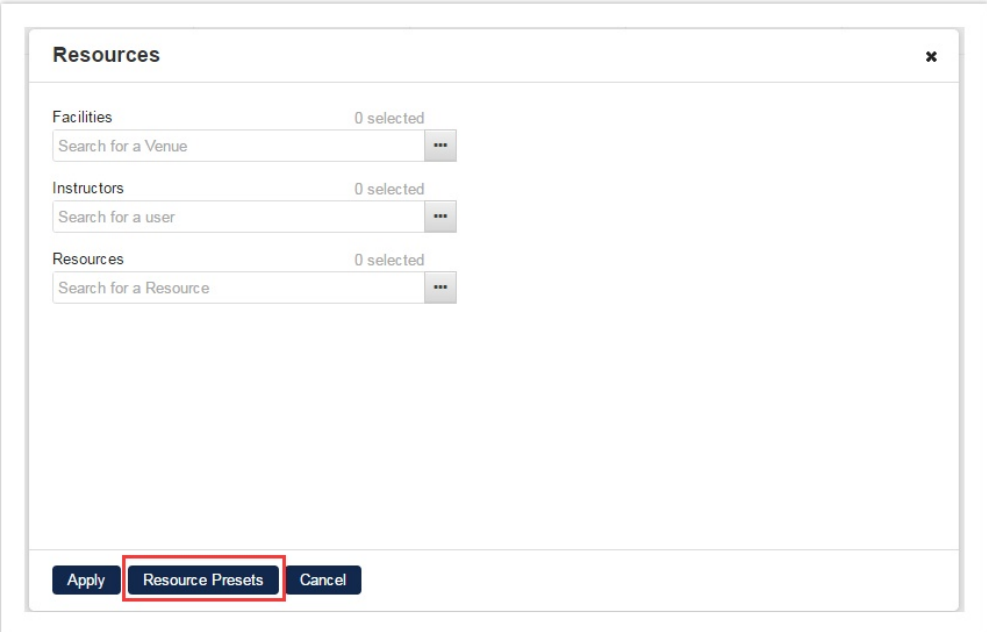


Clicking "Resource Presets" will launch a dialog listing all Presets and from here you can

1. Load the Preset Resources into the Planner
2. Edit a Preset Name
3. Delete Presets
4. Change the default Preset



As well as being accessible from the menu, the Resource Presets dialog is also accessible from the Resource Selection dialog:

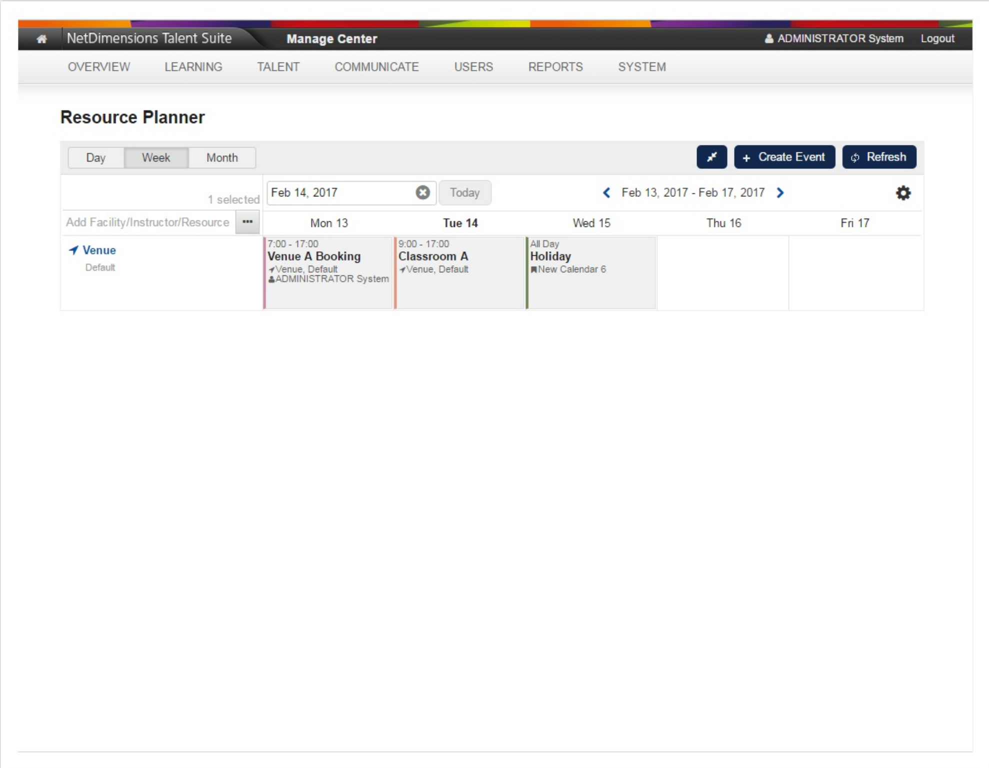


Facility, Instructor, and Resource Schedules at Resource Planner

The Resource Planner displays the schedules of Facilities, Instructors, and Resources.

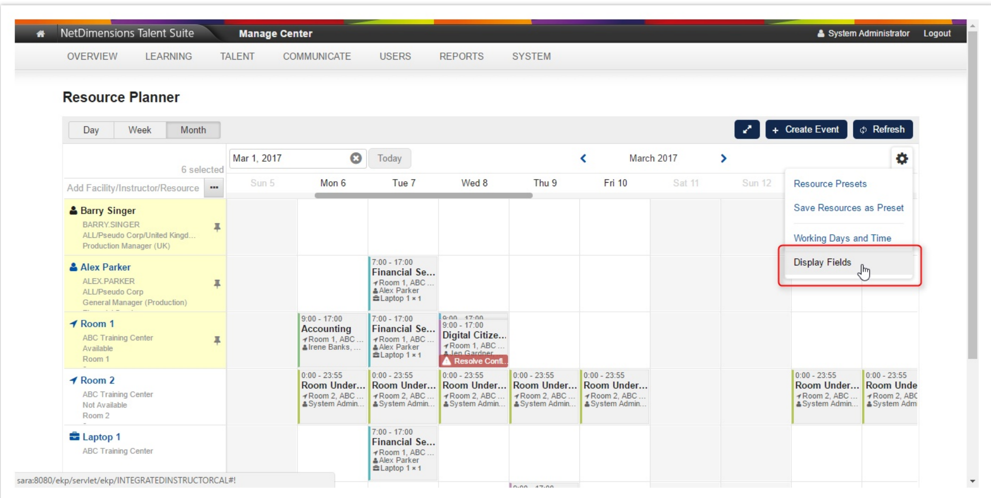
Event blocks will appear when:

1. The Facilities / Instructors / Resources have been booked as part of a training event.
2. The Facilities / Instructors / Resources have been booked directly.
3. There is a holiday associated with the Training Center to which the Facilities / Instructors / Resources belongs.

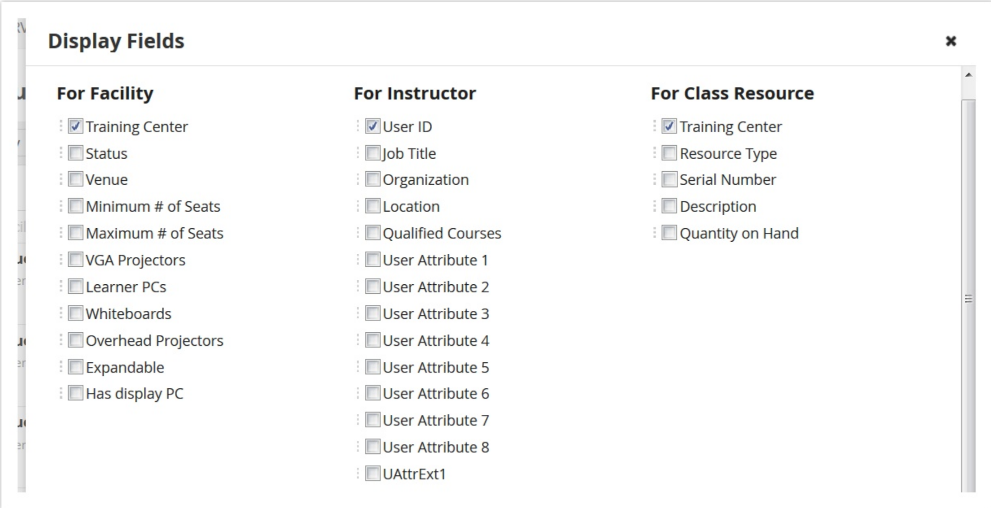


Resource Display Fields at Resource Planner

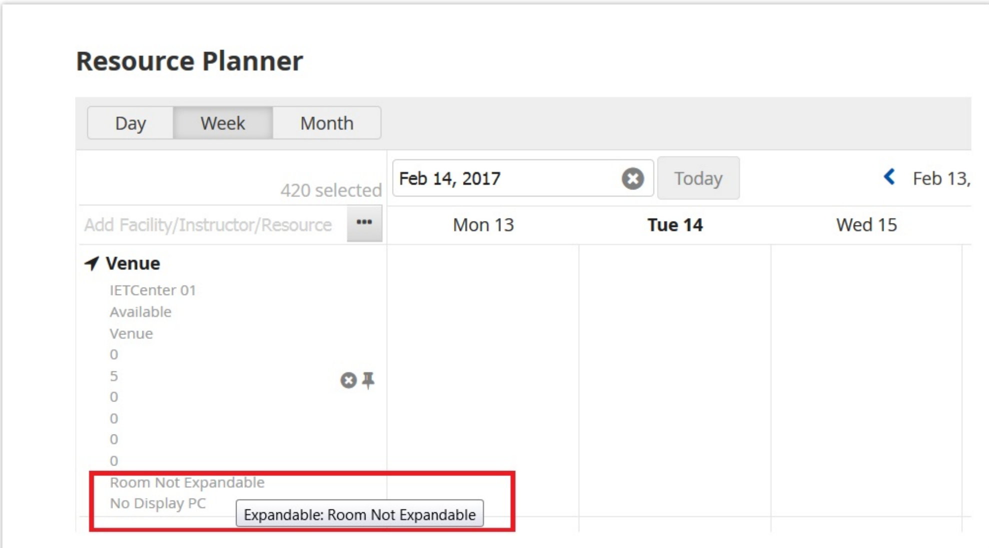
In addition to an Instructor's Name, there may be other properties that will assist in Resource Planning. The same is true for Facilities and Class Resources. These properties can be configured for display via "Display Fields":



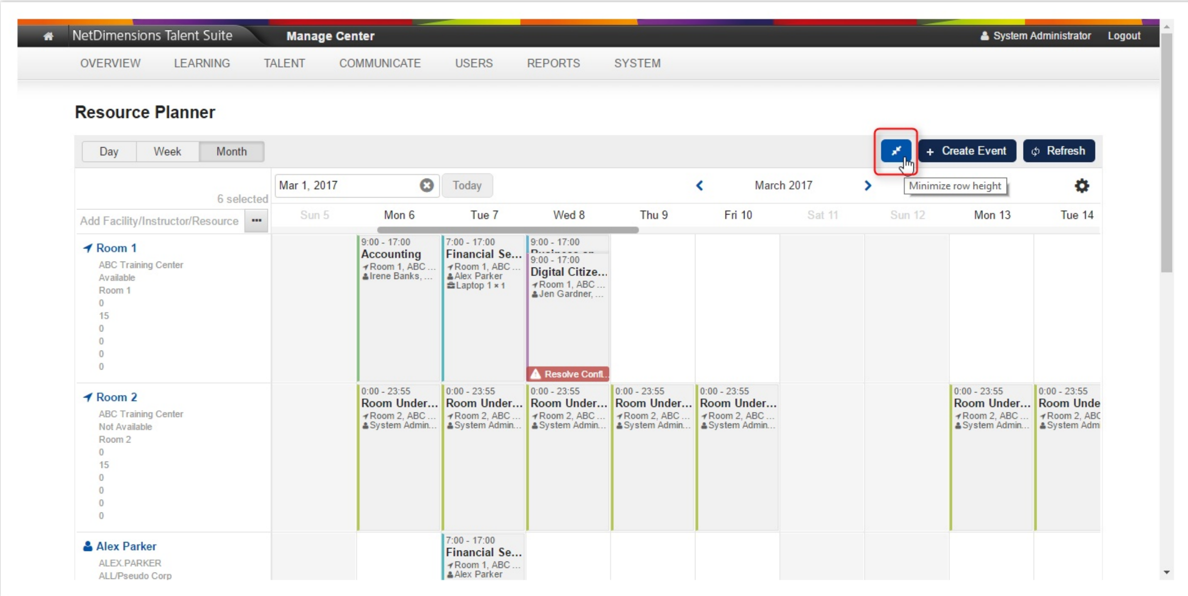
Here you can toggle the display of a wide selection of properties and also specify the display order by dragging and dropping the field:



The Resource Planner will display information that user has checked in the Display field setting with the full property label and value on mouseover:



When a number of properties have been configured for display, it can dramatically heighten each row and affect usability. In these situations, you can minimize the row height and only maximize when you need to refer to the properties:

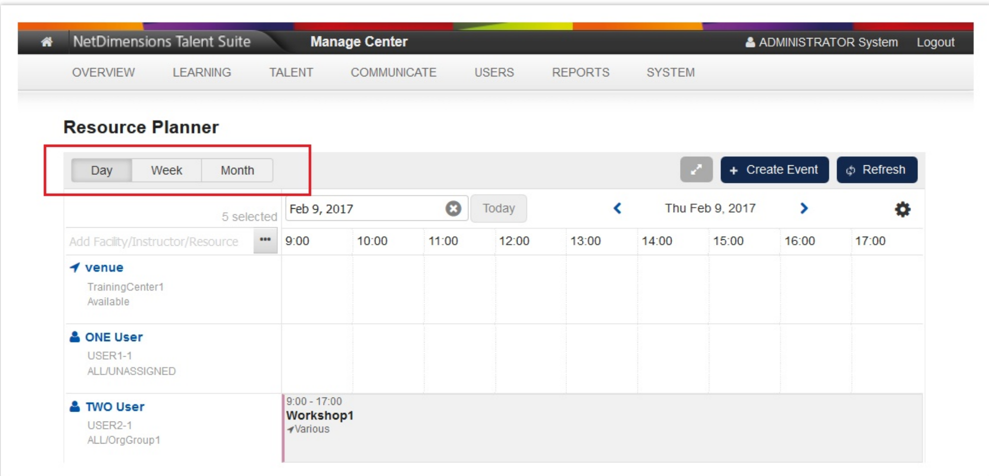


Configured Display Fields (and Working Days and Time) will be stored even after logging out.

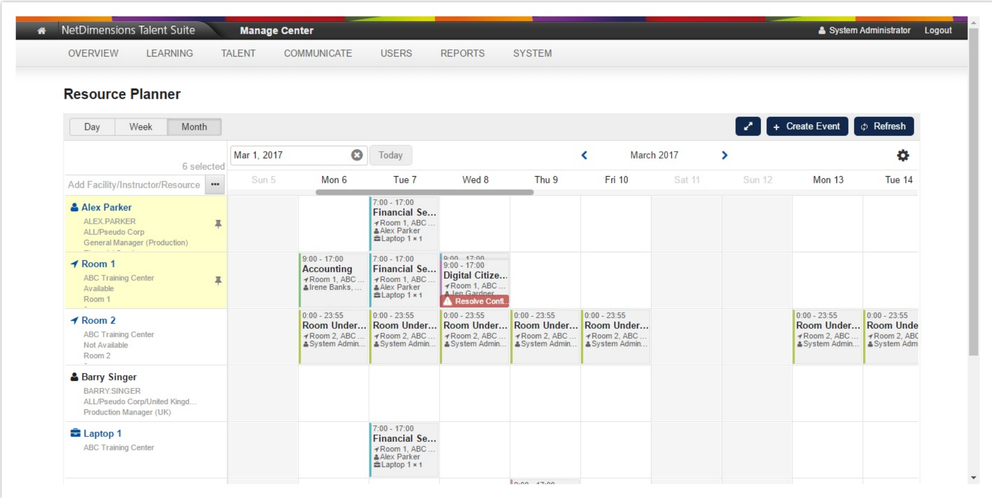
If more information is required for a resource, depending on permissions, clicking a resource (Facilities / Instructors / Resources) name will open the full Class Resource Manager "Edit" page of the respective resource a new tab.

Day, Week, and Month Views at Resource Planner

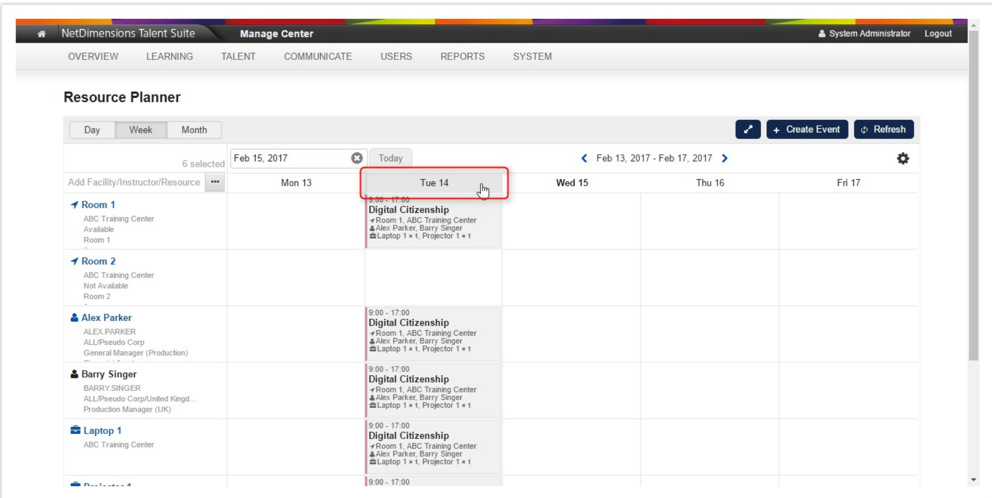
Depending on the task at hand, it may be better to view the hours of a particular day along the x-axis rather than the days of the week or month. This feature allows users to switch between Day/Week/Month views by the view setting shown at the top left-hand corner of the Resource Planner page:



The month view is designed to provide a high-level view of availability:



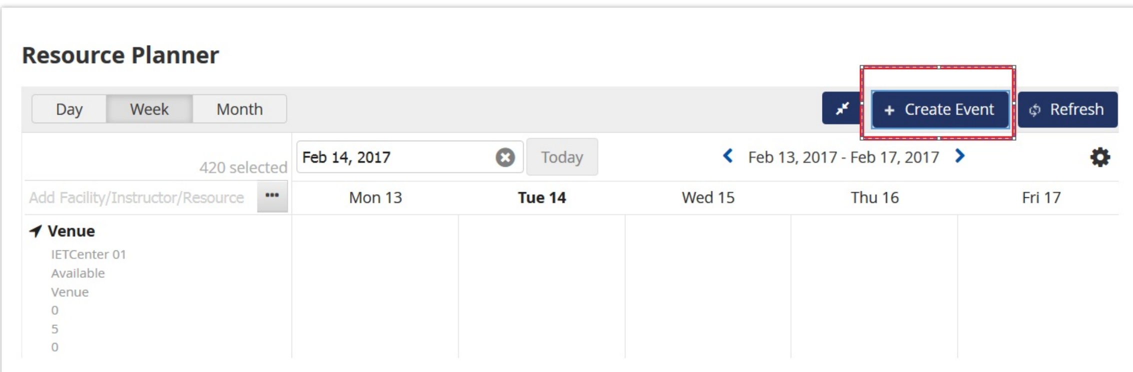
Users can jump directly into the day view for a specific date by clicking on the date header in Week or Month view:



Creating Events

There are three ways to start the Create Event flow:

1. To create an event for all resources listed in the planner, navigate to the event date and click "Create Event"



2. To create an event for an individual resource in the planner, navigate to the event date and click on the cell corresponding to the desired resource and start date/time.

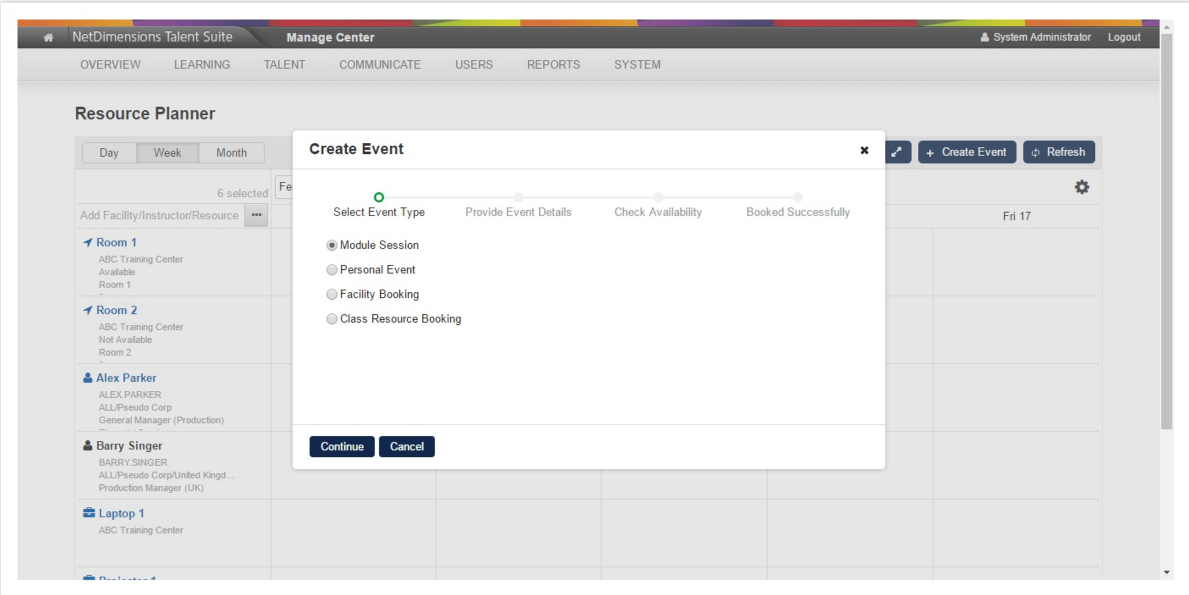
3. To create an event for several resources in the planner, perform **Pin to top** for the desired resources, and click on the cell corresponding to the desired start date/time. Select **Schedule for pinned resources** when the context menu appears.

Once the flow has been started, simply follow the steps to create an event.

Step 1: Select Event Type

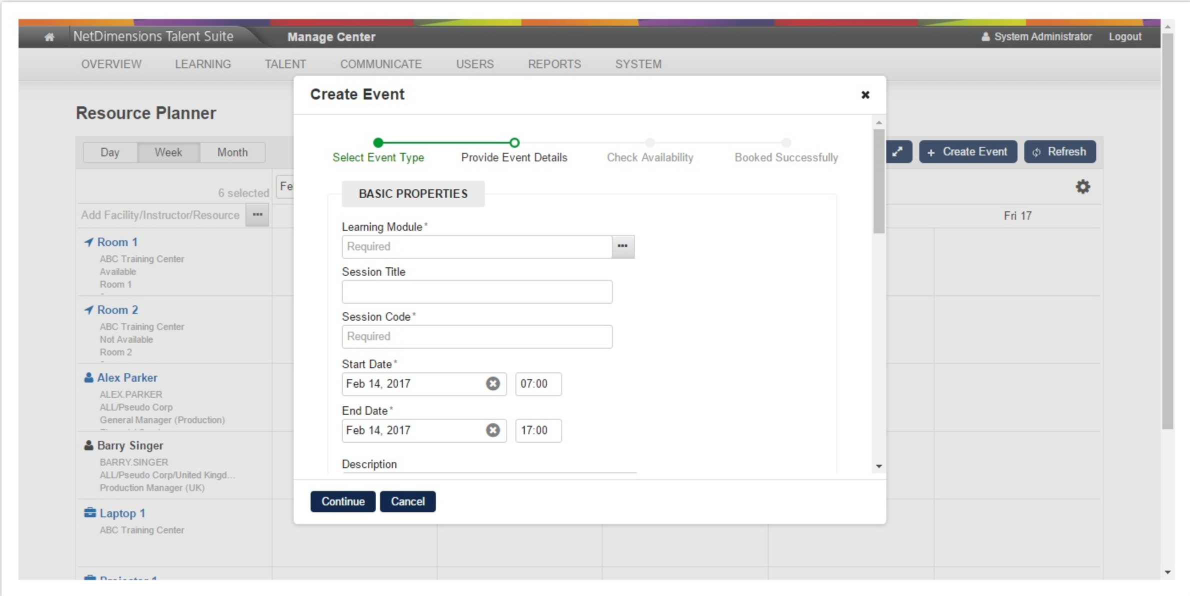
You can select from the following event types:

1. Module Session: applicable to Facilities, Instructors, and Class Resources
2. Personal Event: applicable to Instructors only
3. Facility Booking: applicable to Facilities only
4. Class Resource Booking: applicable to Class Resources only



Step 2: Provide Event Details

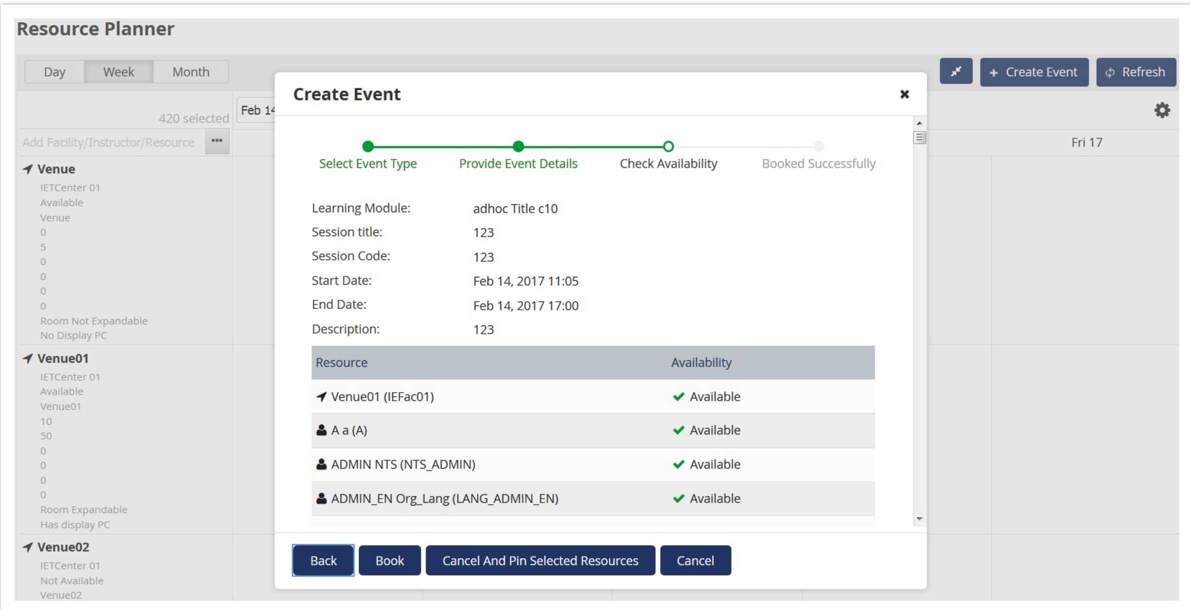
A different Event Details form will be presented depending on the event type selected in the previous step. Date/Time and Selected Resources may already be pre-populated depending on how you started the Create Event flow and the selected event type.



Step 3: Check Availability

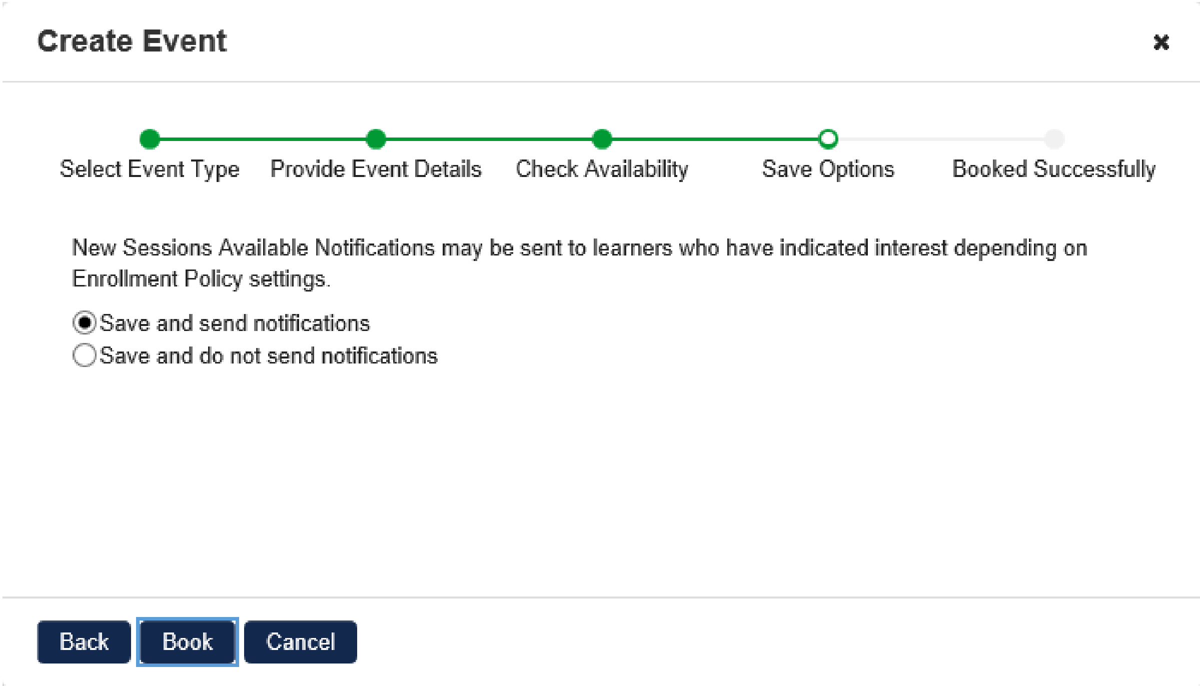
The results of the availability check will be displayed and the administrator will have the option to

1. Book
2. Cancel
3. Cancel and pin the selected resources to the calendar to find an alternative time slot



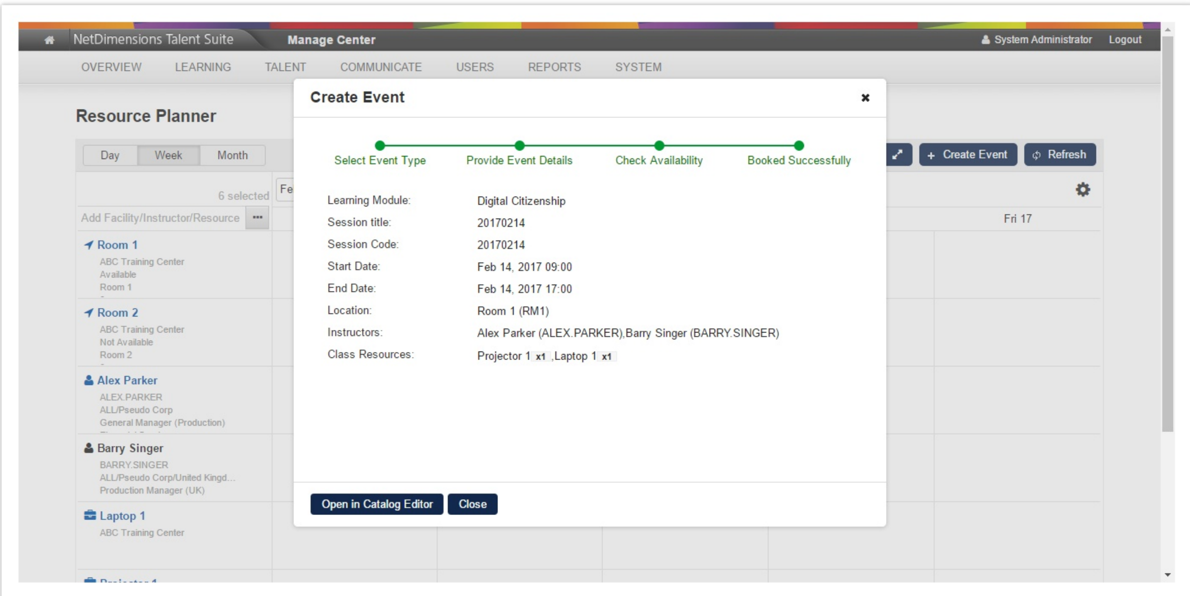
Step 4: Save Options

An additional "Save Options" step will appear if the event is a module session, has a future start date and learners showing interest in the course. You can choose whether to send New Sessions Available Notifications.



Step 5: Booked Successfully

Where the Administrator has continued with the booking, an event summary will be displayed. For Module Session Event Types, there will also be a shortcut to Open in Catalog Editor where more advanced properties can be set for the session.

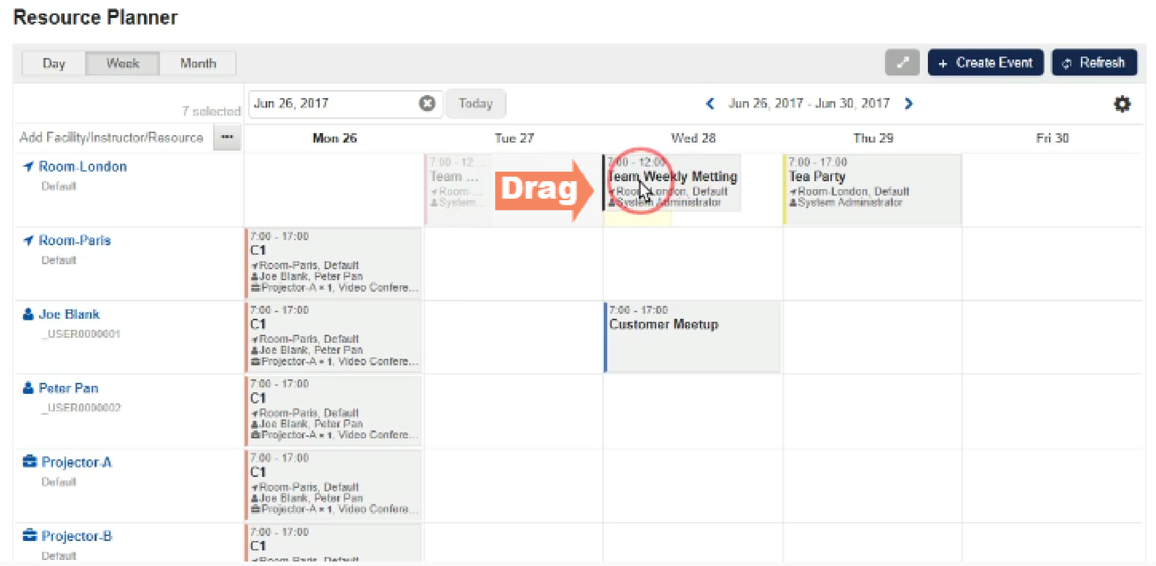


Drag and Drop Editing

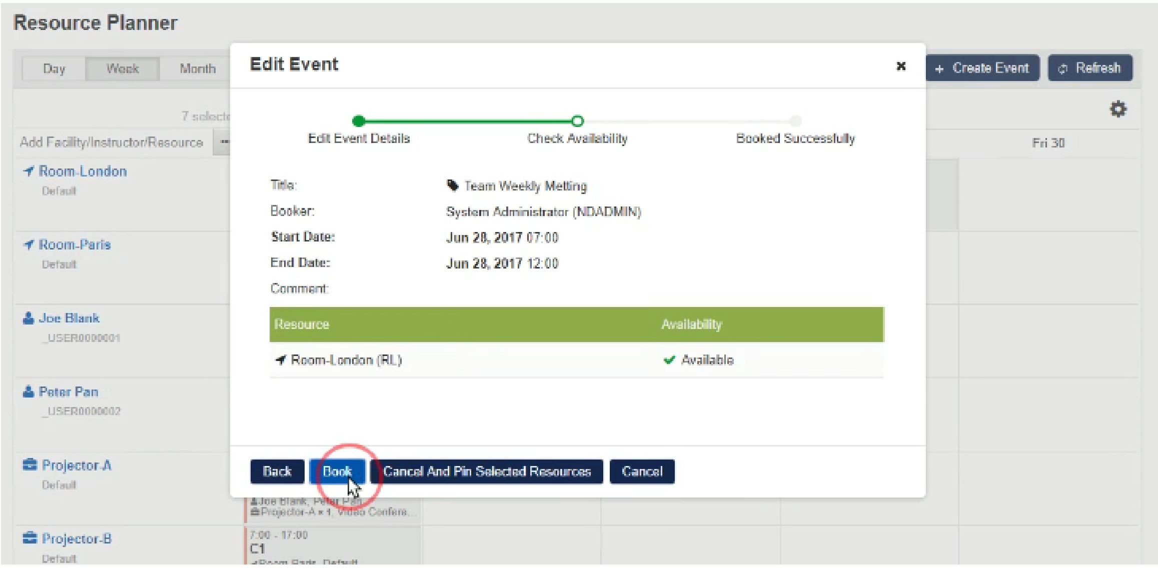
Administrators can drag-and-drop editable event chips to update the schedule directly. (However, Holidays, enrollments, resource reservation, and read-only events **cannot** be edited in this way.)

- In the Week view or Month view, event chips can be dragged to another day at the same time slot to re-schedule the event / booking.

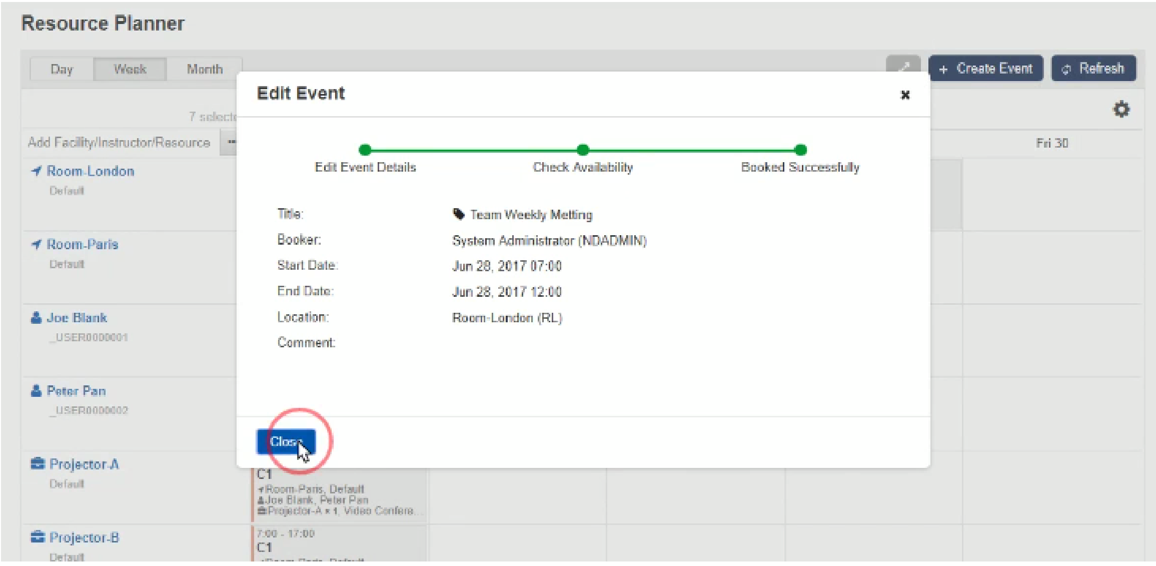
1. Drag the whole chip to the same time slot of another day.



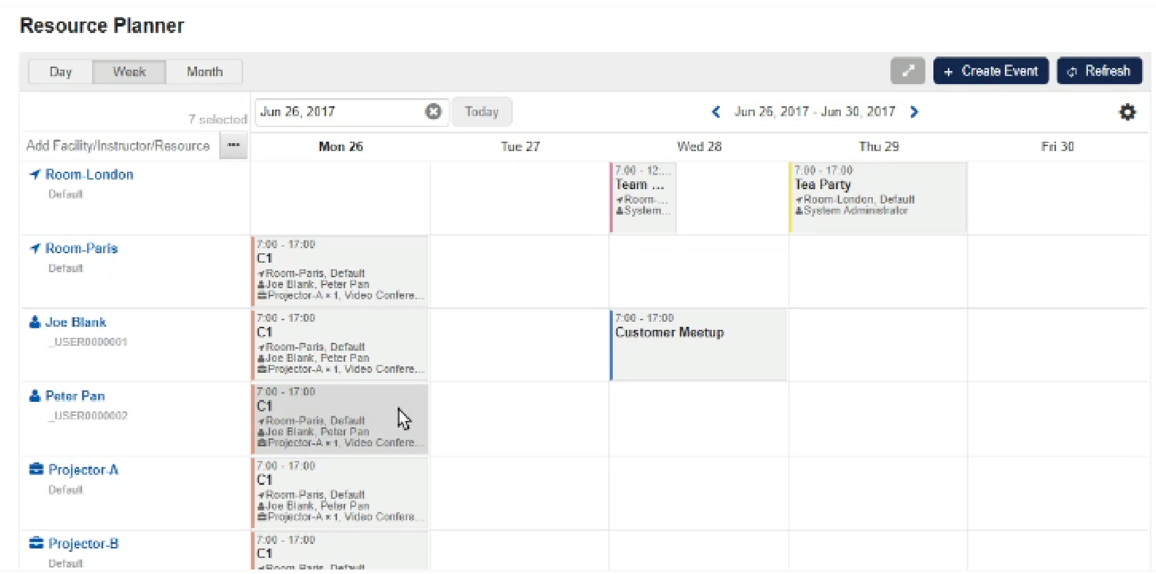
2. The System will ask for confirmation - Press **Book!** to accept the new time.



3. New time will be displayed. Press **Close** to proceed.

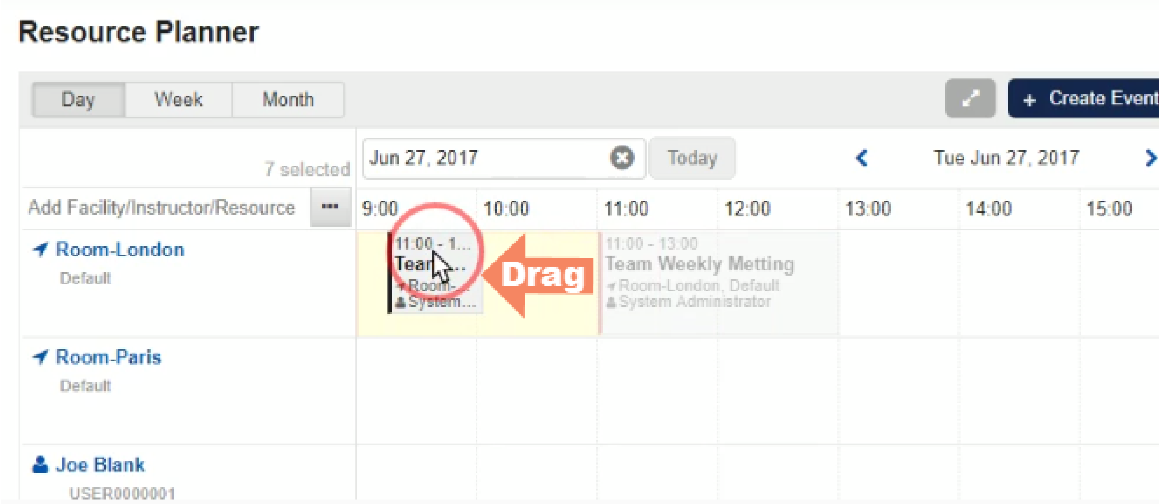


4. The Event has been moved to the new time slot.

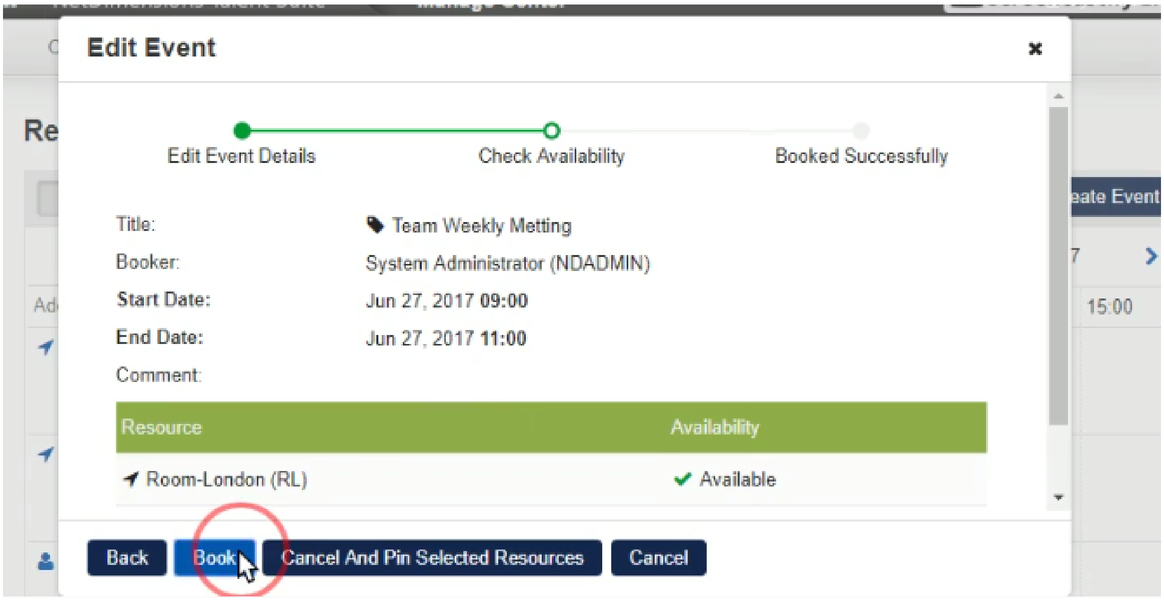


- In the Day view, event chips can be dragged to update the start and / or end time(s) of an event, and *they can be resized to update the duration of an event.

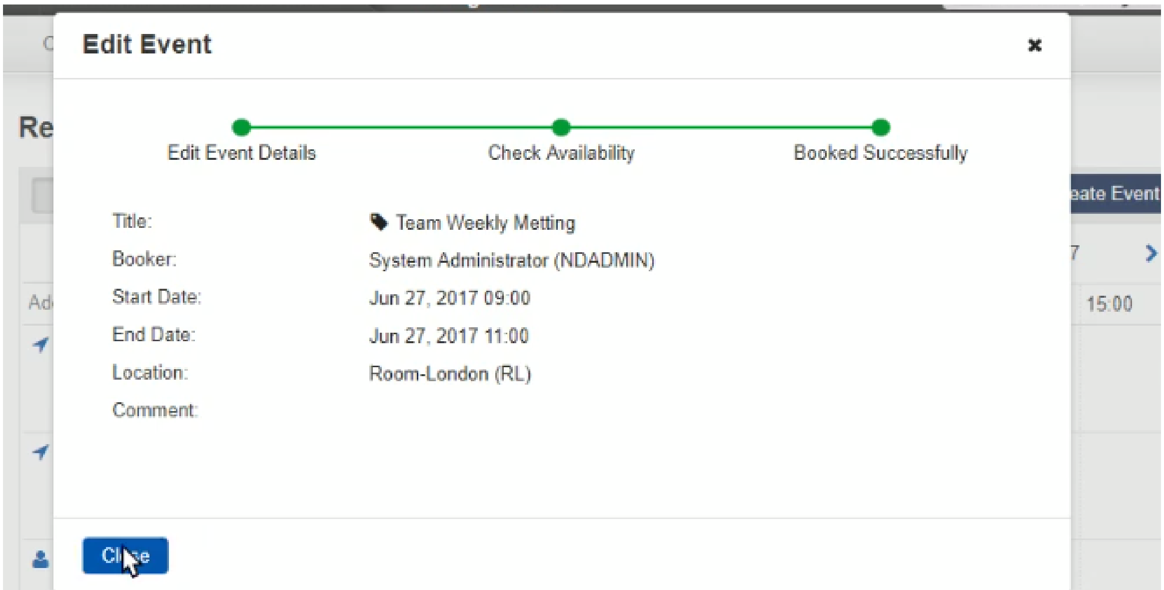
1. Drag the start timeline to the new position.



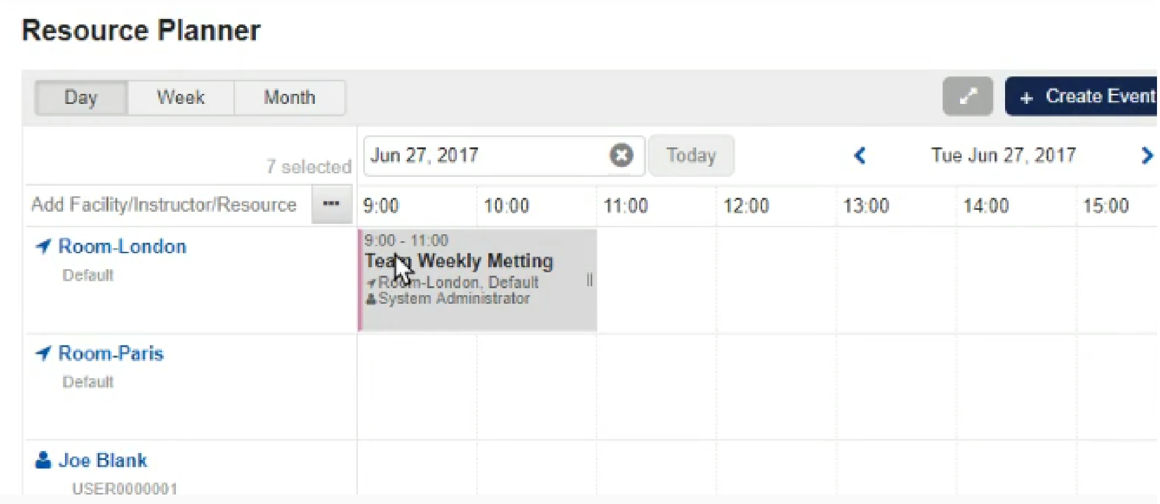
2. The System will ask for confirmation - Press **Book!** to accept the new start time. The end time will be updated accordingly too.



3. The new start time and end time will be displayed. Press **Close** to proceed.



4. The start time and end time of the Event have been changed with the same duration.

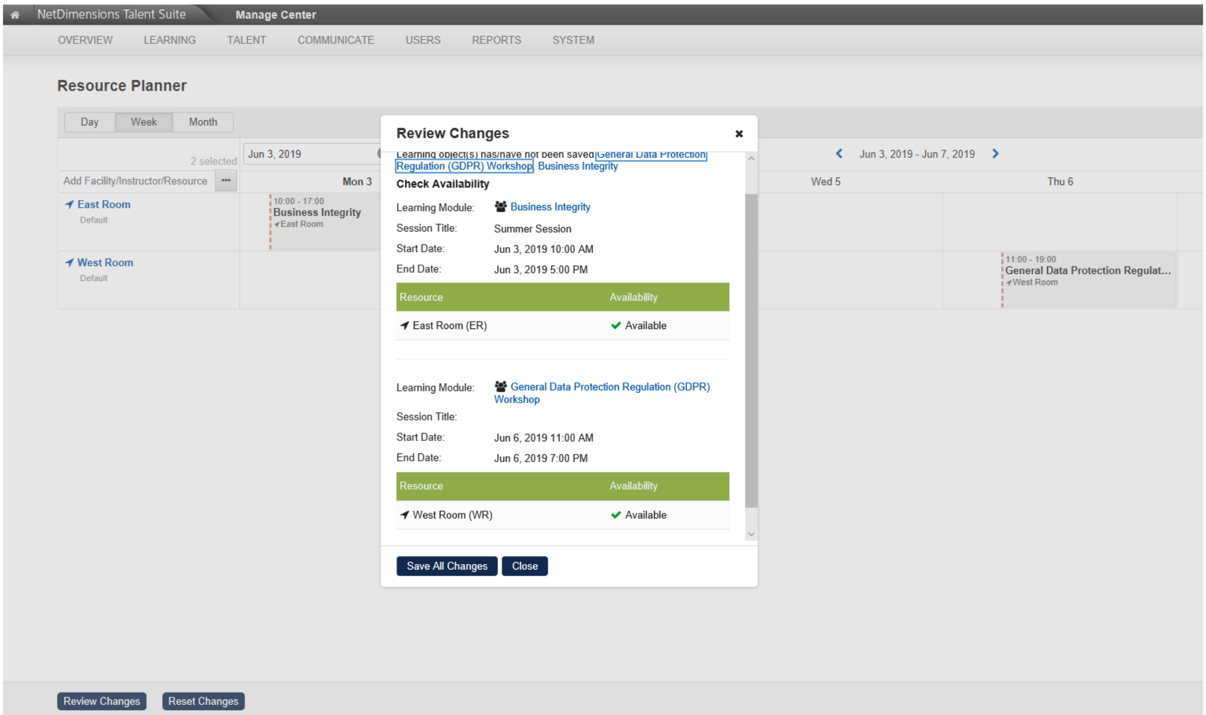


***Note:**

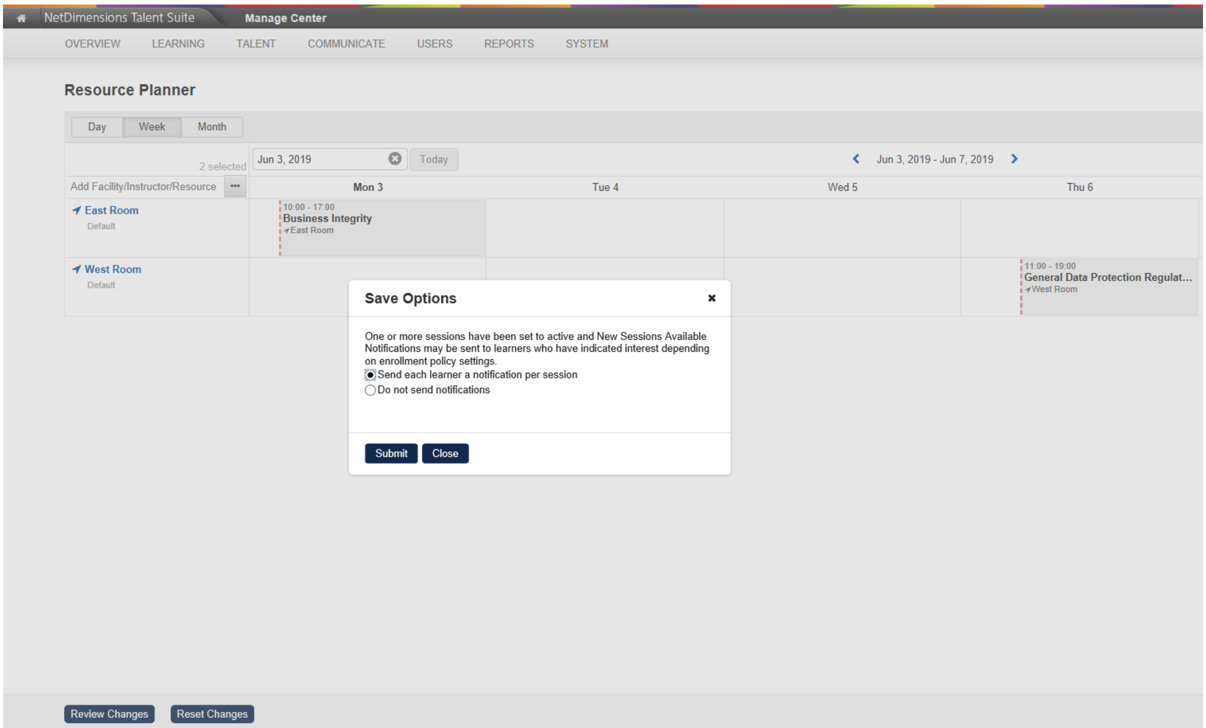
The end time can also be changed by drag-and-drop in the same way. The duration of the event can be resized by dragging and dropping the end-time without altering the start time.

Marking Changes as Draft

If the Event being edited is a module session, there will be a checkbox "**Mark this change as draft**" at Step "Save Options". The Administrator can click the "**Review Changes**" button to review and save all changes.

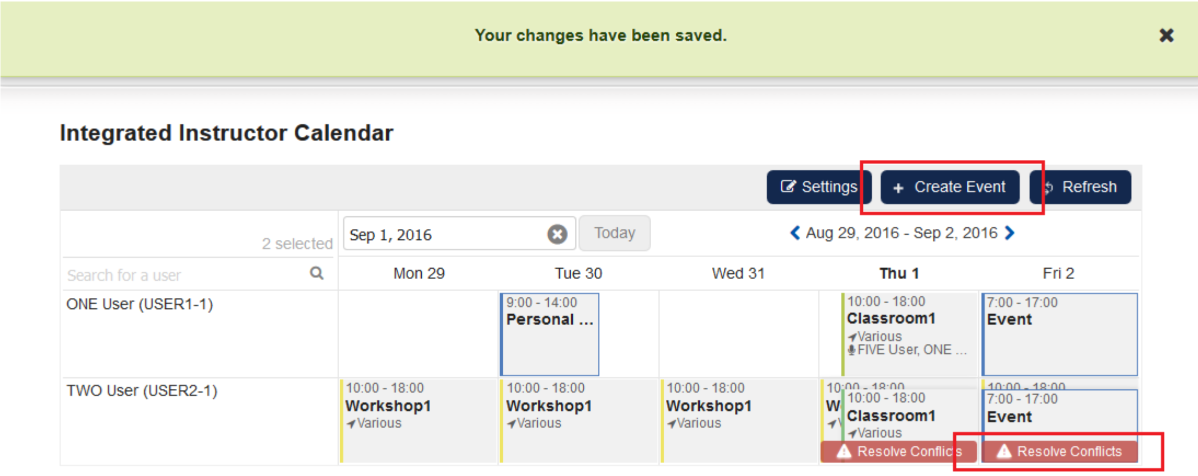


After clicking "Save All Changes", a "Save Options" dialog will be displayed if there are eligible sessions with future start dates and learners having interest in the course. You can choose whether to send New Sessions Available Notifications:

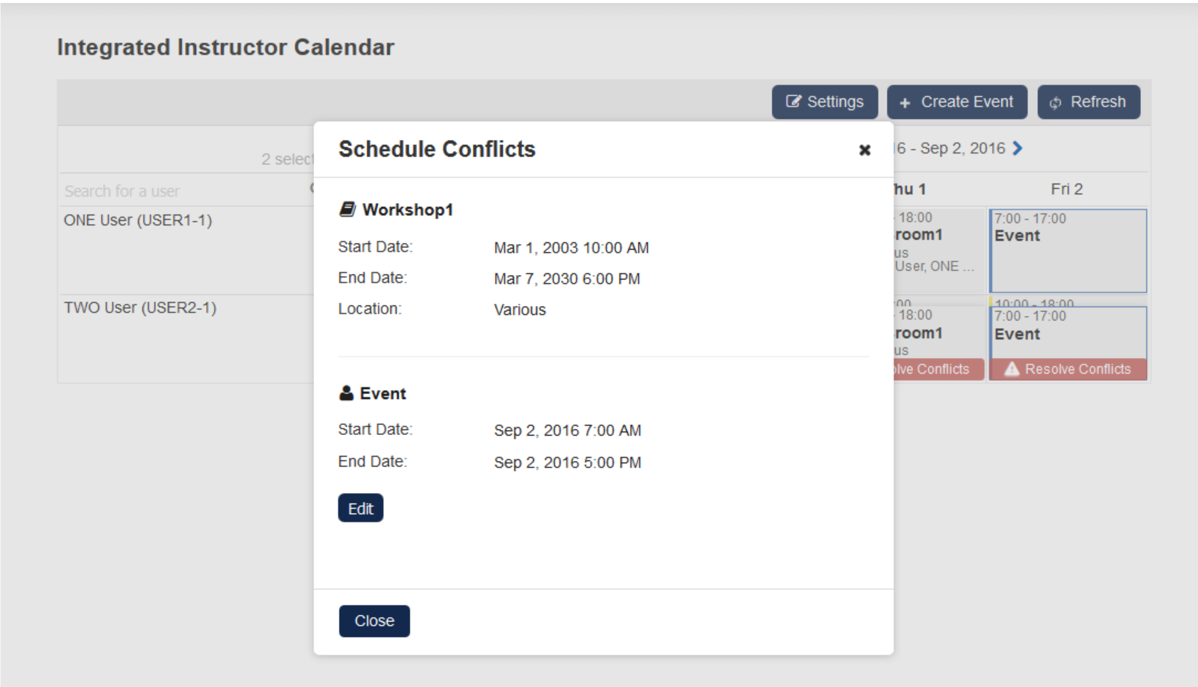

NetDimensions Talent Suite
Manage Center
OVERVIEW
LEARNING
TALENT
COMMUNICATE
USERS
REPORTS
SYSTEM
Resource Planner
Day
Week
Month
2 selected
Jun 3, 2019
Today
Jun 3, 2019 - Jun 7, 2019
Add Facility/Instructor/Resource
Mon 3
Tue 4
Wed 5
Thu 6
East Room
Default
10:00 - 17:00
Business Integrity
East Room
West Room
Default
11:00 - 19:00
General Data Protection Regulat...
West Room
Save Options
One or more sessions have been set to active and New Sessions Available Notifications may be sent to learners who have indicated interest depending on enrollment policy settings.
Send each learner a notification per session
Do not send notifications
Submit
Close
Review Changes
Reset Changes

Conflict Resolution

On days with schedule conflicts, there will be a "Resolve Conflicts" indicator:

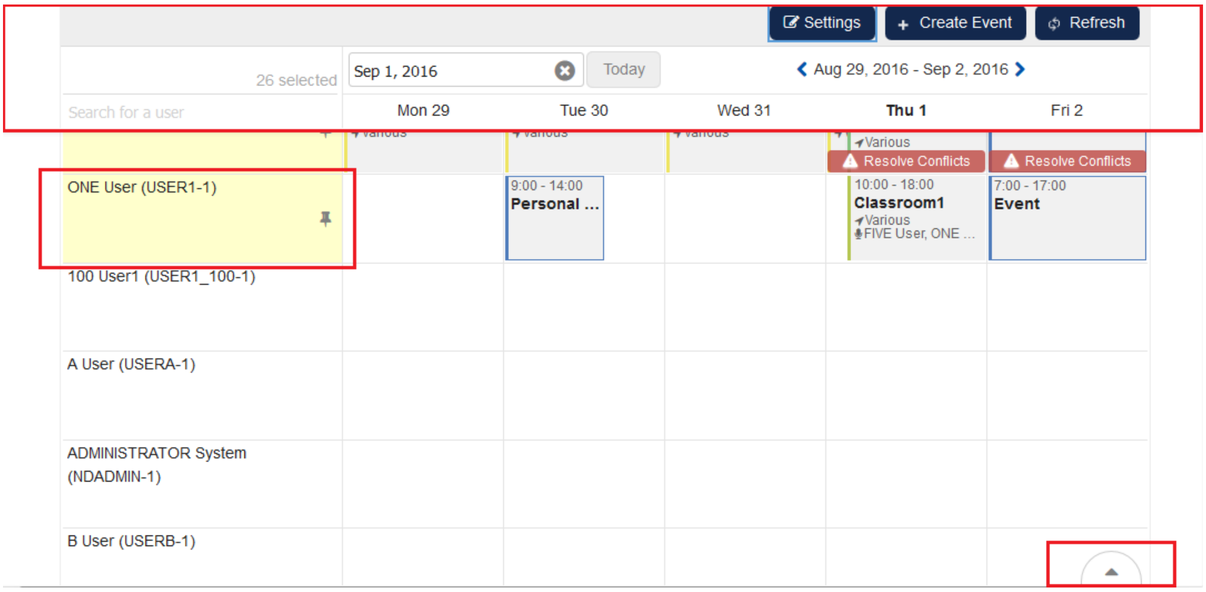


Users can click on the Resolved Conflicts indicator to view or edit the conflicts:



Back to Top Viewing

The date and action area stays on the top of the calendar as the Users scroll vertically. This is to prevent losing sight of the day and date when scrolling down a long instructor list. To get back to the top/pinned instructors, click the "Back to Top" function at the bottom right-hand corner of the page.

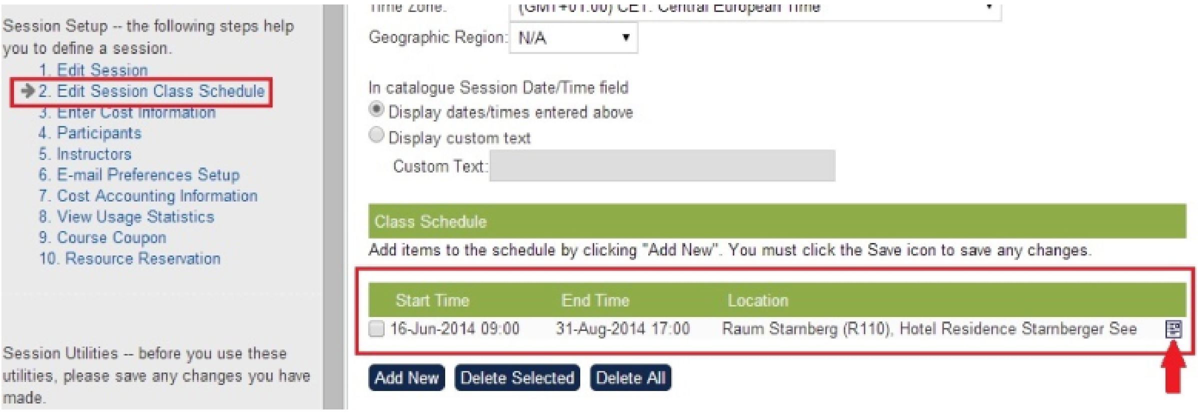


Settings
Create Event
Refresh
26 selected
Sep 1, 2016
Today
Aug 29, 2016 - Sep 2, 2016
Search for a user
Mon 29
Tue 30
Wed 31
Thu 1
Fri 2
Various
Resolve Conflicts
Resolve Conflicts
ONE User (USER1-1)
9:00 - 14:00
Personal ...
10:00 - 18:00
Classroom1
Various
FIVE User, ONE ...
7:00 - 17:00
Event
100 User1 (USER1_100-1)
A User (USERA-1)
ADMINISTRATOR System (NDADMIN-1)
B User (USERB-1)

Class Resource Planning Interface in Catalog Editor

The Class Resource Planning Interface provides an integrated view of the current resource booking calendar to the Administrators, so that they can know about the availability of the venue, the instructors and the resources (e.g. projectors) when scheduling session classes.

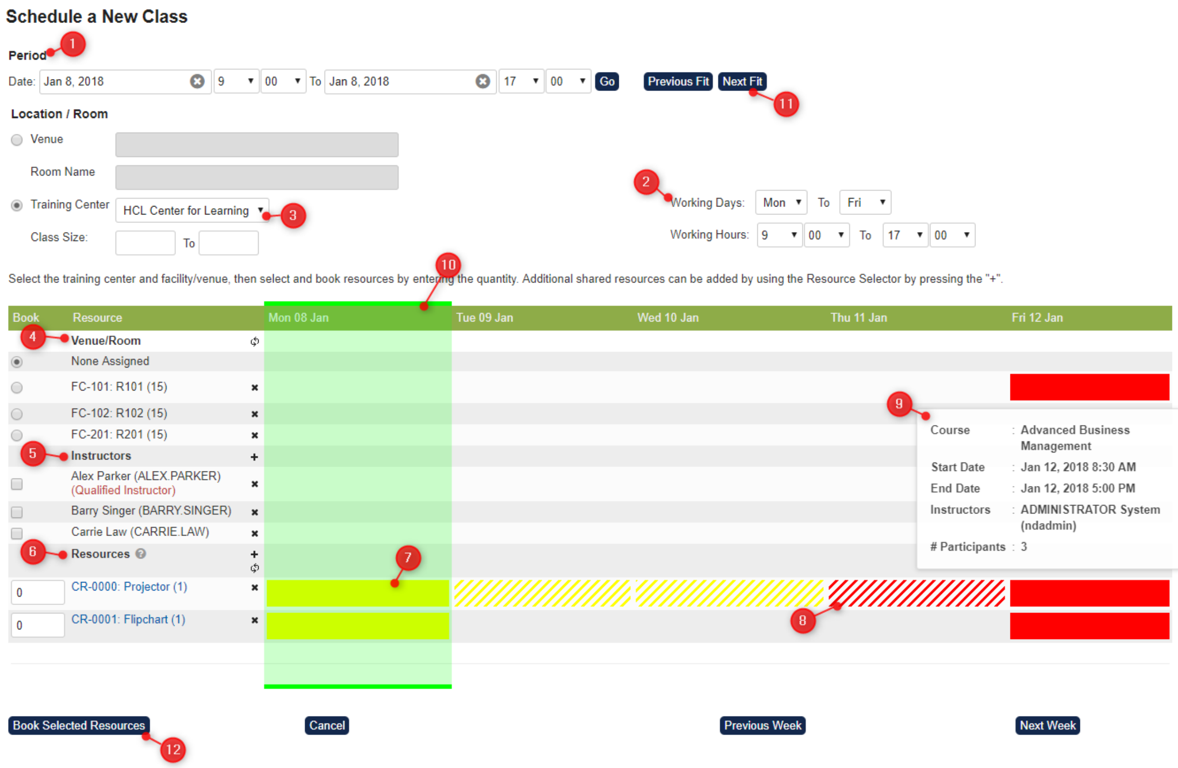
The Interface can be accessed by Catalog Editor > Session Properties > Edit session class schedule > Session Class Schedule > under Class Schedule > Click next to the desired session.



To set up a session class for a course:

1. Input the preferred Date range for the class under **Period**. The timezone of the dates will be the one set at the session level. Click "**Go**" and the calendar view will switch to the week containing the start date. Although a class can span multiple days, it is recommended to split it into a number of day sessions. So each session can start and end on the same day, and that multiple sessions can be held on multiple days.
2. By default, the calendar view goes from Monday to Friday, and the horizontal span of a day's column represents the period from 9:00 am to 5:00 pm. This view can be changed by using the " **Working Days**" and "**Working Hours**" selectors.
3. By checking **Training Center** and selecting the Centers from the pull-down, the associated facilities and resources are listed in the Calendar.
4. Check the desired venue for the current class.
5. Instructors set at the session level are default who will be automatically displayed on the list. Instructor(s) can be added to the Calendar by clicking **+** next to **Instructors**. A selector will then appear for selecting Instructors. Once returning to the Interface, check the desired Instructor(s). Any bookings for the instructors will be indicated by the horizontal bars.
6. The quantity of the resource located at the Training Center (including both booked and unbooked) will be shown. Entering the quantity of the resource to be booked for the current class in the boxes.
7. The calendar events for Facilities, Instructors, and Class Resources will be displayed in the calendar. A horizontal bar indicates that the resources have already been booked during that particular time period: Yellow - The booking belongs to the current course session; Red - The booking belongs to some other course session.
8. Hatched blocks indicate the Class Resource is unavailable due to pre or post-event processing.
9. Mouseover the coloured blocks to see additional information about the event
10. A green vertical highlight means that all selected resources are available for the preferred date range, while a red one indicates there is a conflict with an existing booking.
11. When there are conflicts, the "Previous Fit" and "Next Fit" buttons can be clicked to let NetDimen sions Performance application identify the previous / next available time slot (in half-hour increments) during which all required resources are free. This functionality will take into consideration the values set at **Working Days** and **Working Hours** so that the suggested date and time will not fall outside any related persons' working hours.

12. Press **Book Selected Resources** to close the Class Resource Planning Interface Window. Finally, save the class booking inside Catalog Editor.

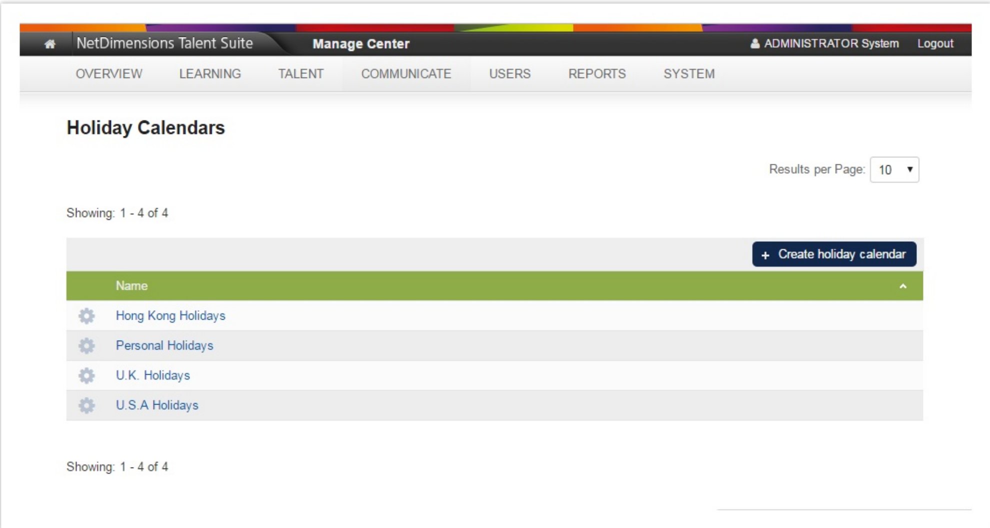


Holiday Calendars

Holiday Calendars are accessible under the Class Resource Manager. This allows users to create and edit holiday calendars.

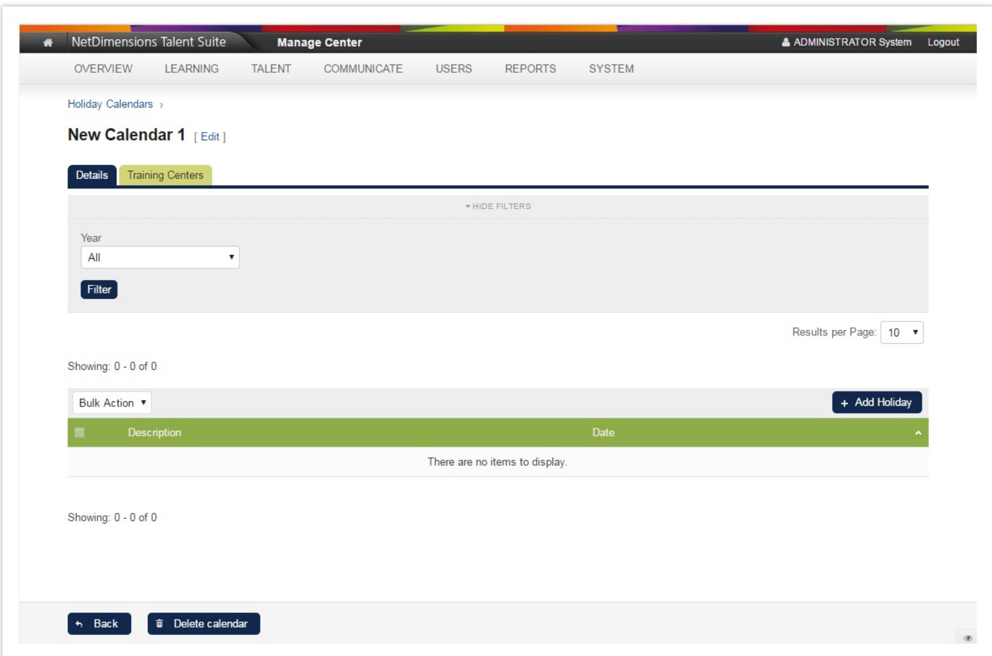
Holiday Calendars Listing

Holiday Calendars are listed using standard UI components. The *Create Holiday Calendar* button is positioned in the top right, Holiday Calendars are listed in a table, and each Calendar has its own gear button containing the Edit and Delete actions:



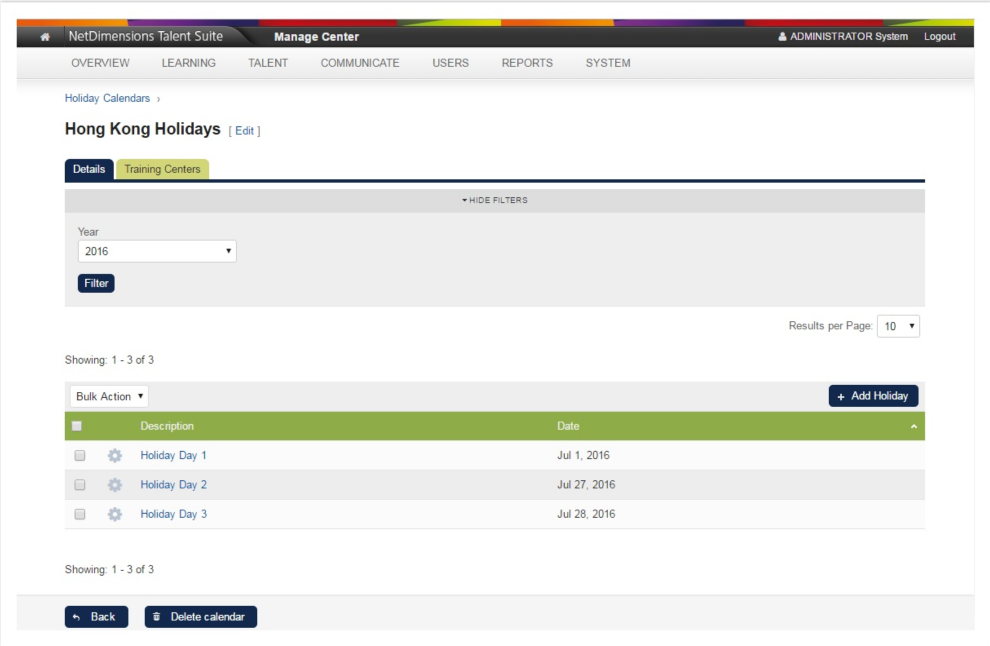
Creating a New Holiday Calendar

Clicking on "Create Holiday Calendar" creates a new holiday calendar in the system and browser is redirected to the newly created calendar's Edit page:

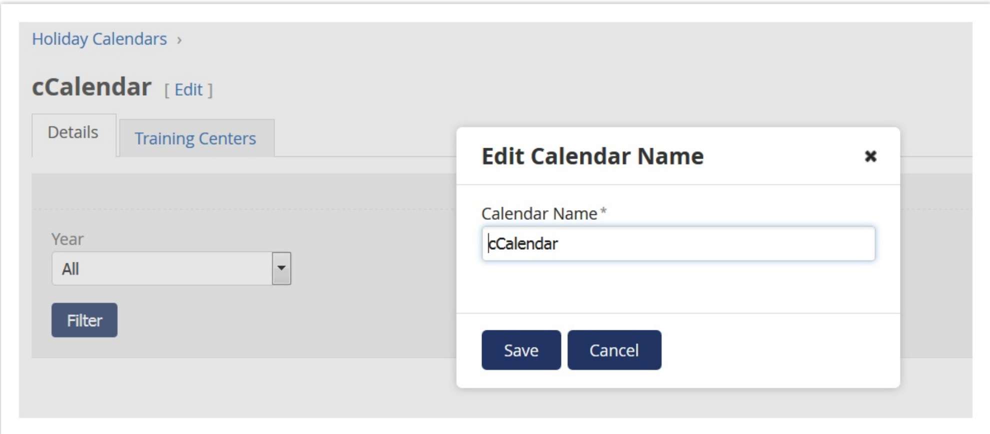


Editing Calendars

Clicking on the "Edit" button or the holiday calendar name allows users to view the details of the calendar:



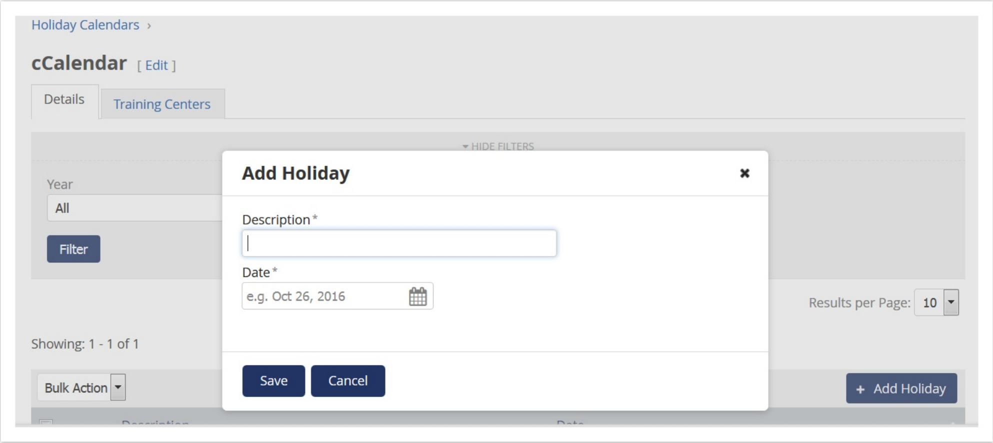
By clicking on the "Edit" next to the Calendar Heading, users can edit the Calendar name:



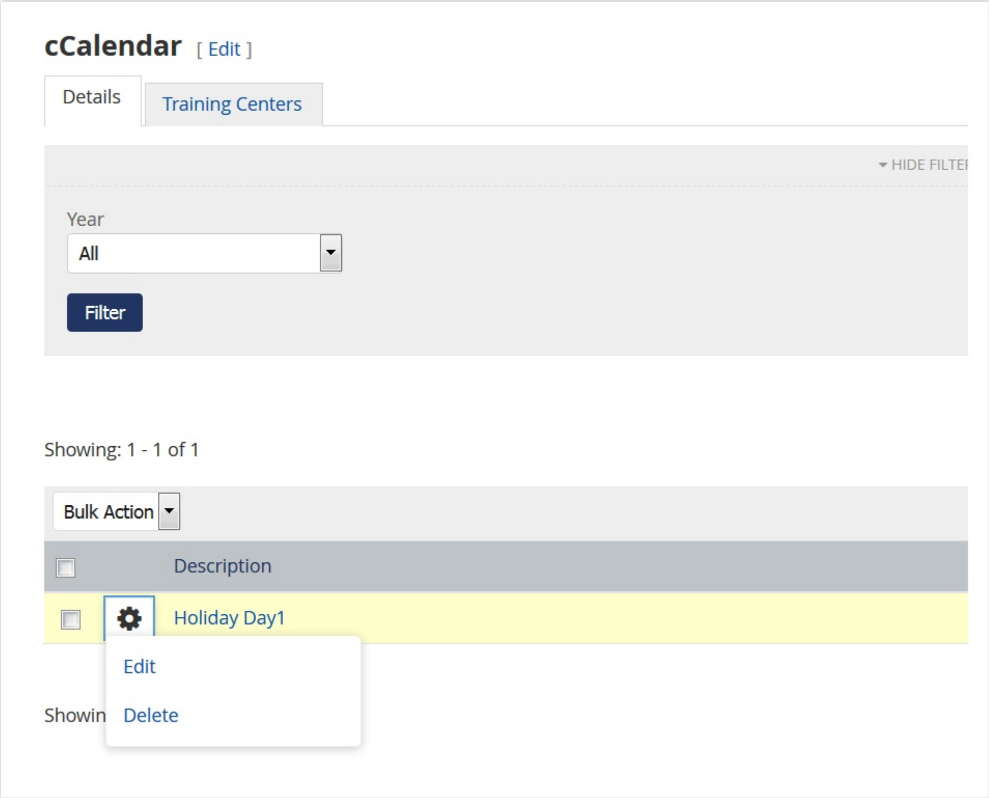
Clicking the "Delete" button; a dialog will be prompted to confirm the deletion.

Adding Holidays

By clicking on the "Add Holiday" under the Details tab, holidays can be added to the Calendar:

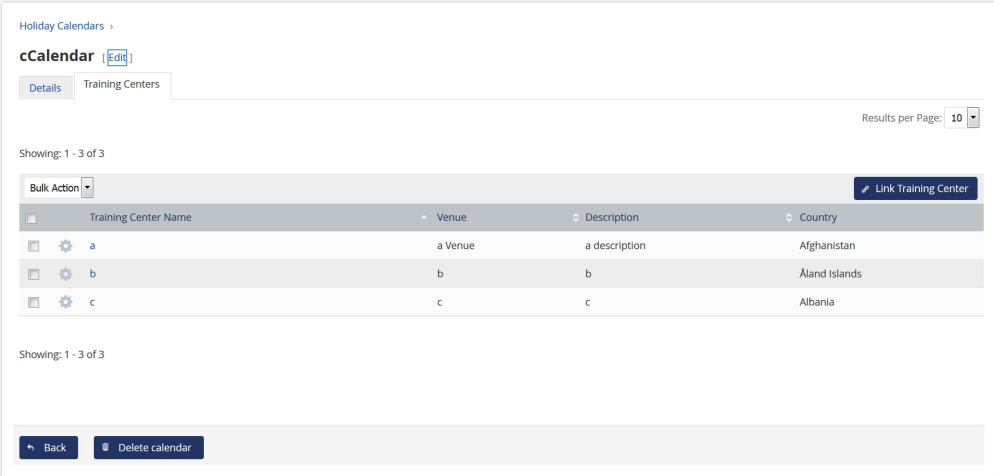


Each Holiday can be edited or deleted:

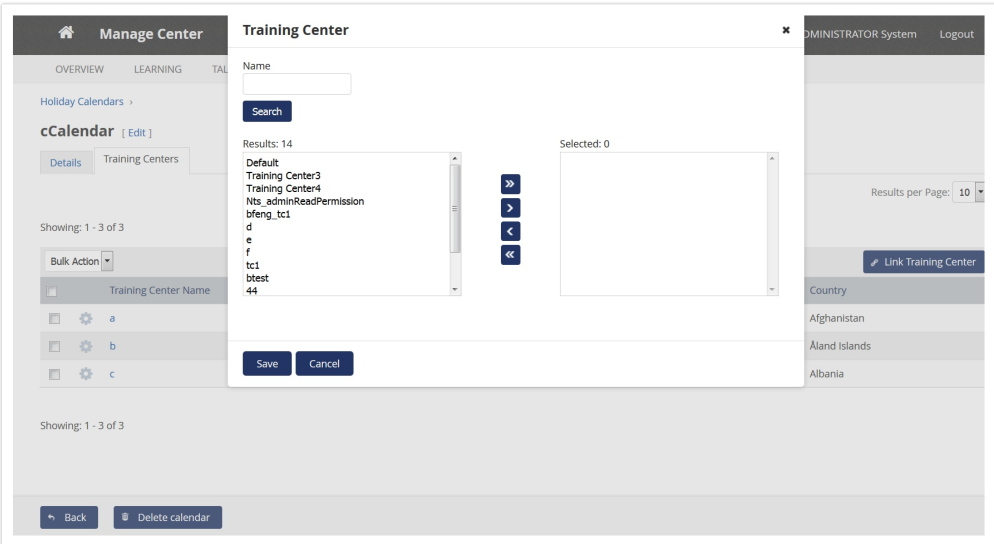


Linking Training Centers

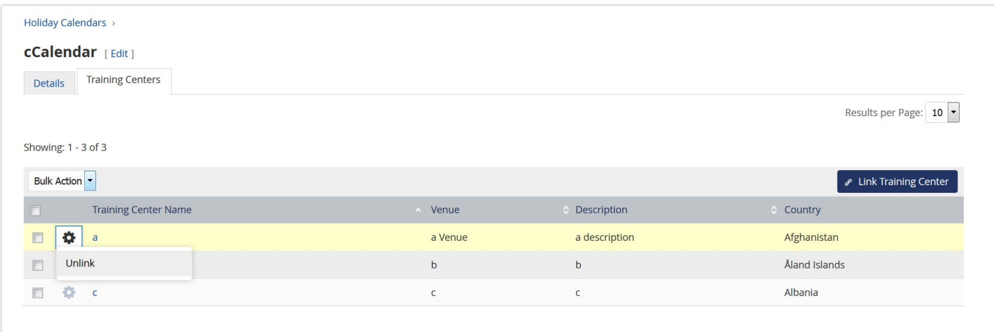
The training centers to which the Calendar has been linked are listed under the Training Centers tab:



Clicking on the "Link Training Center" button will launch a training center selector to specify which training centers to link to:



To unlink a training center from the Calendar, click on "Unlink" under the respective Training Center's gear icon:



External Training and Training Records CSV Loader

External Training CSV Loader

(applies to NetDimensions Talent Suite)

Talent Suite supports bulk upload of External Training Records via the External Training CSV Loader. Please refer to EN145 Data Import Export for more information.

Training Records CSV Loader

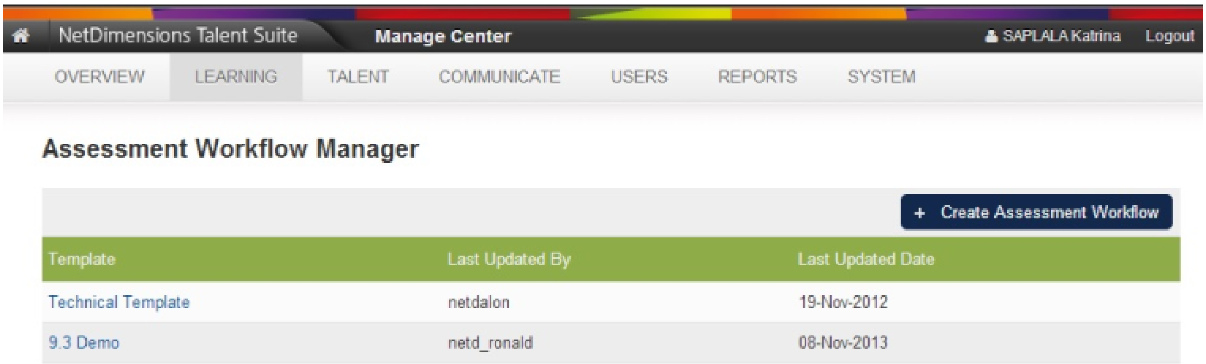
(applies to NetDimensions Talent Suite)

Training CSV loader allows the user to upload vast numbers of trainings taken by the users. Please refer to EN145 Data Import Export for more information.

Assessment Workflow

(applies to NetDimensions Performance, NetDimensions Learning, NetDimensions eLearning)

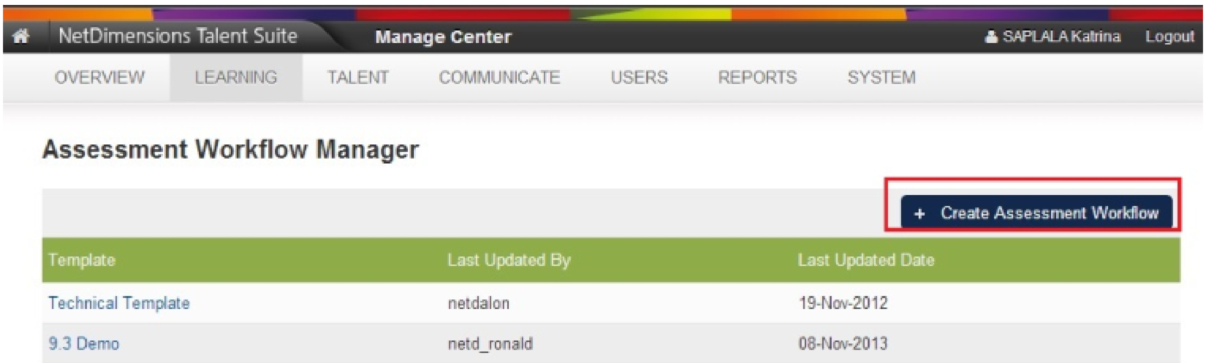
The purpose of this customization is to provide a way to create different assessment workflow templates, which consist of a list of pre/post evaluations/exams, for courses.
To create and manage the assessment workflow template proceed to **Manage Center > Learning > Catalog General Settings > Assessment Worflow Manager**. This opens the *Assessment Workflow Manager*



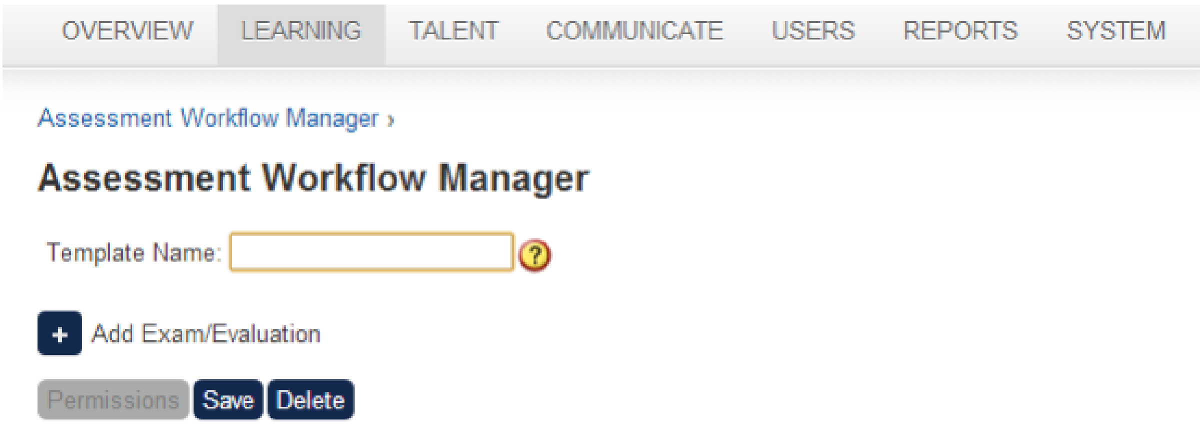
Creating a New Assessment Workflow

To create an assessment workflow:

1.On the assessment workflow manager, click the **Create Assessment Workflow** button.



2.The screen for creating new assessment workflow appears. Enter the **Template name**.

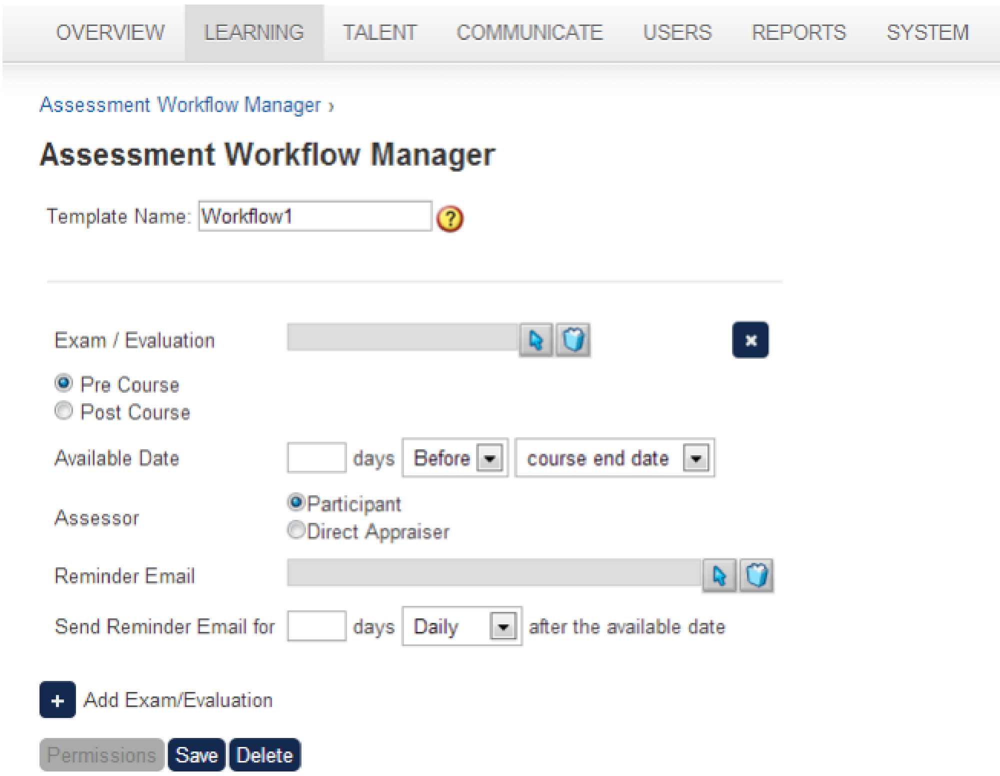


3.Click the **Save** button to save the new template. Once saved, the **Permission** button will be enabled.

1. To add and exam or evaluation to the assessment workflow, click the **+ Add Exam/Evaluation** b utton.

The assessment workflow details appears:

1. This screen allows you to enter the following parameters (see details just below the image)
2. Once you have entered the required parameters, click the **Save** button to keep the changes.



Enter the following parameters

1. Exam/Evaluation – The selected exam/evaluation
2. Pre/Post Course – Determines if the assessment workflow is pre or post course
3. Reminder Email – An email to be sent to reminder users regarding the assigned exam/evaluation
4. Available Date – The first date the reminder email will be sent. This is defined by the number of days before/after the course start/end date
5. Assessor – Identifies the recipient of the reminder email whether it is the Participant or the

Assessor
6. Frequency – How often should the reminder email be sent (daily/weekly)
7. Expiration – How many days the reminder email will stop after the Available Date

Note: Reminder email will only be sent if the assigned exam/evaluation is not completed.

1. ***Template Setting***

There will be 3 main places for configuring workflow template:

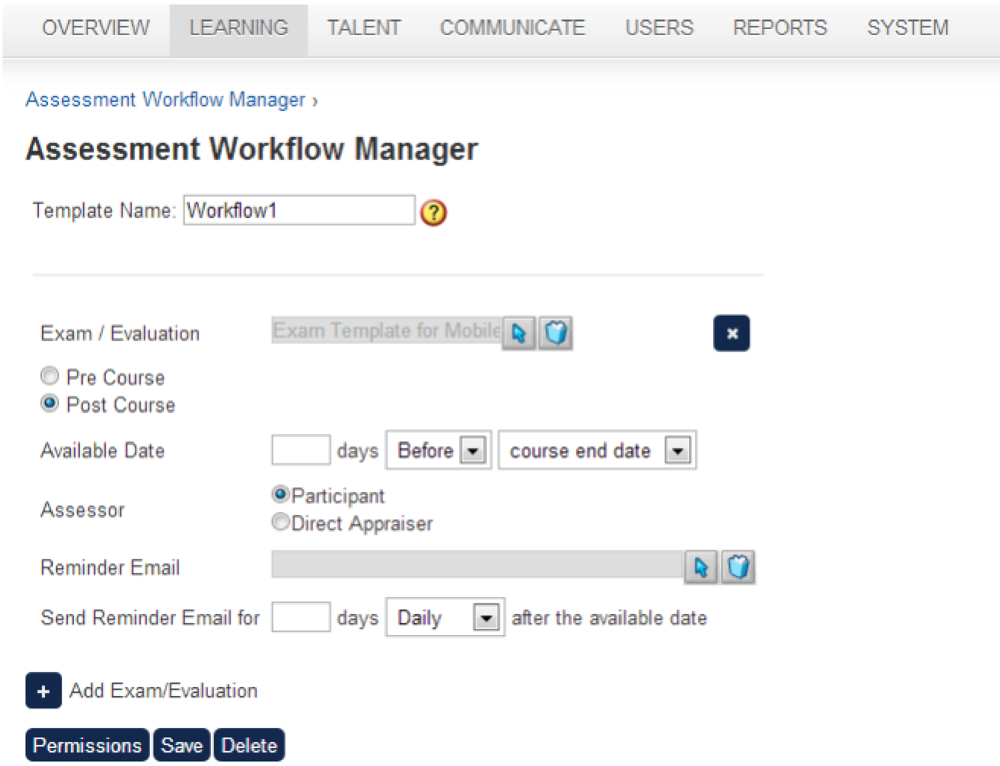
1. System-wide default template
2. Organization default template
3. Session defined template

During enrollment, the system will first look for session defined template, if there is no template defined for the session, the system will look for organization default template. If there is no organization default template, the system will look for system-wise default template. In any case, if the session is set to turn off the use of template, no workflow will be applied to enrollment of that session.

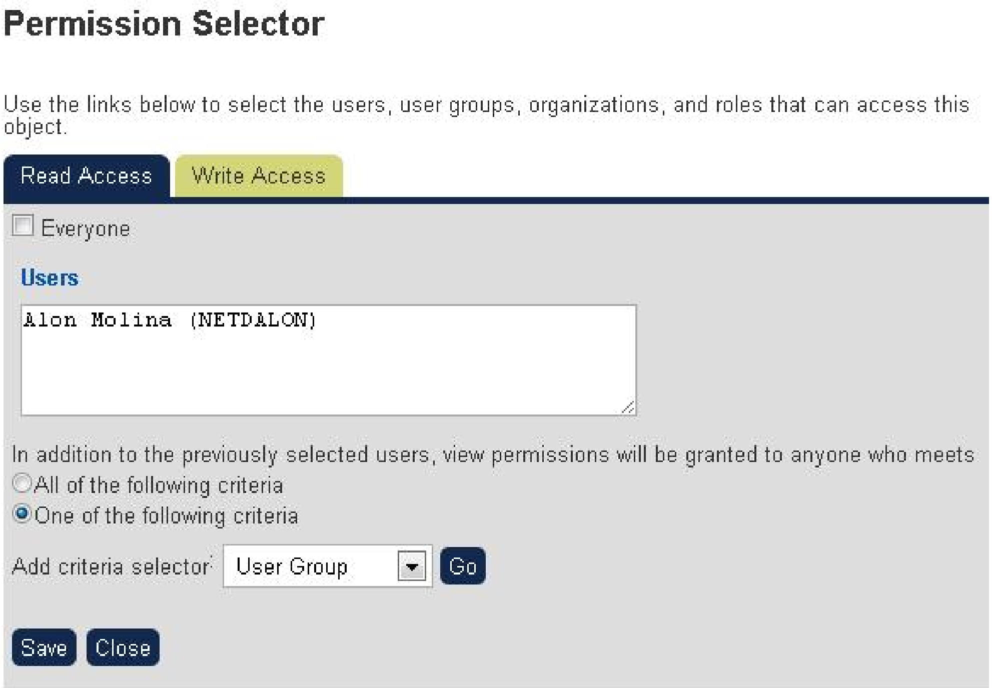
Setting Permission to Assessment Workflow

To set permission to assessment workflow:

1.On the assessment workflow details, click the **Permission** button.



2.The menu for setting permission is displayed. Set the permission (see section **Root Catalog Permissions** on this document.)



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

Wiki Integration

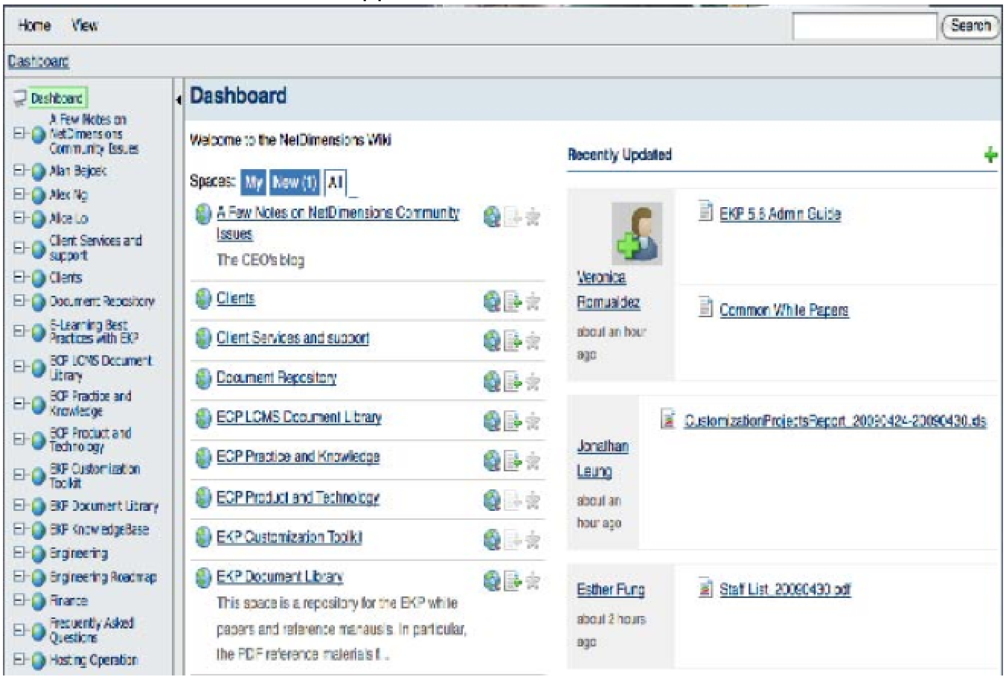
(applies to NetDimensions Performance NetDimensions Learning NetDimensions eLearning)

The Talent Suite provides for Single-Sign-On interaction with the Atlassian Confluence Wiki. When configured into the application, a menu item appears that allows the user to click directly into the Wiki.

The interface may be configured to operate in one of two modes:

1. Option 1: Access is always through the NetDimensions Talent Suite application
2. Option 2: Access may be direct Confluence login, or through NetDimensions Talent Suite application SSO login

The Talent Suite will add a "Wiki" link to the left menu and in the Reference Resource tab of the Knowledge Center, and clicking on the link will open a new window with the user transparently signed into Confluence. The window appears with content similar to that shown below.

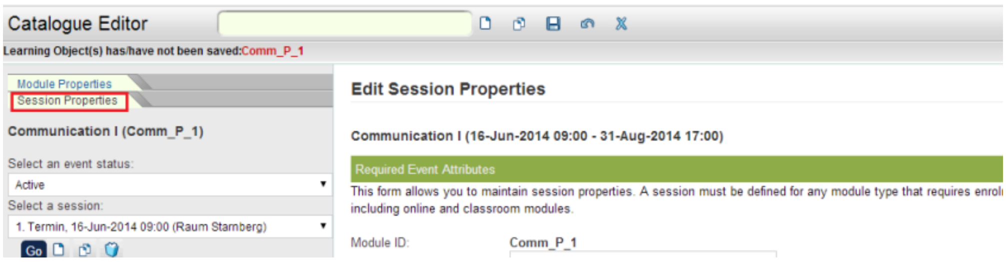


To access the Wiki:

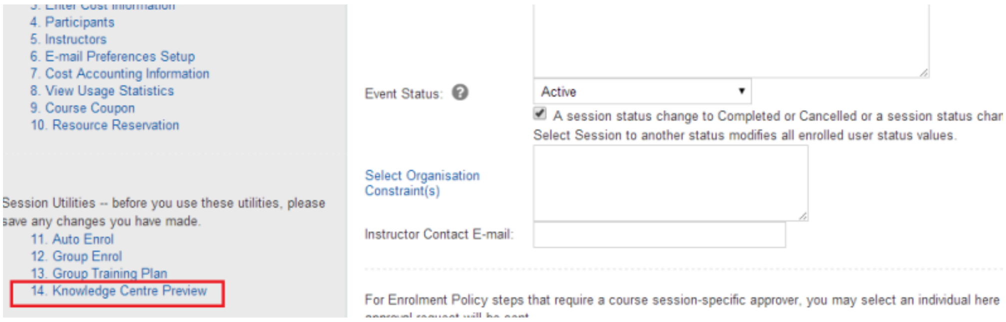
1.Open the Catalog Editor.

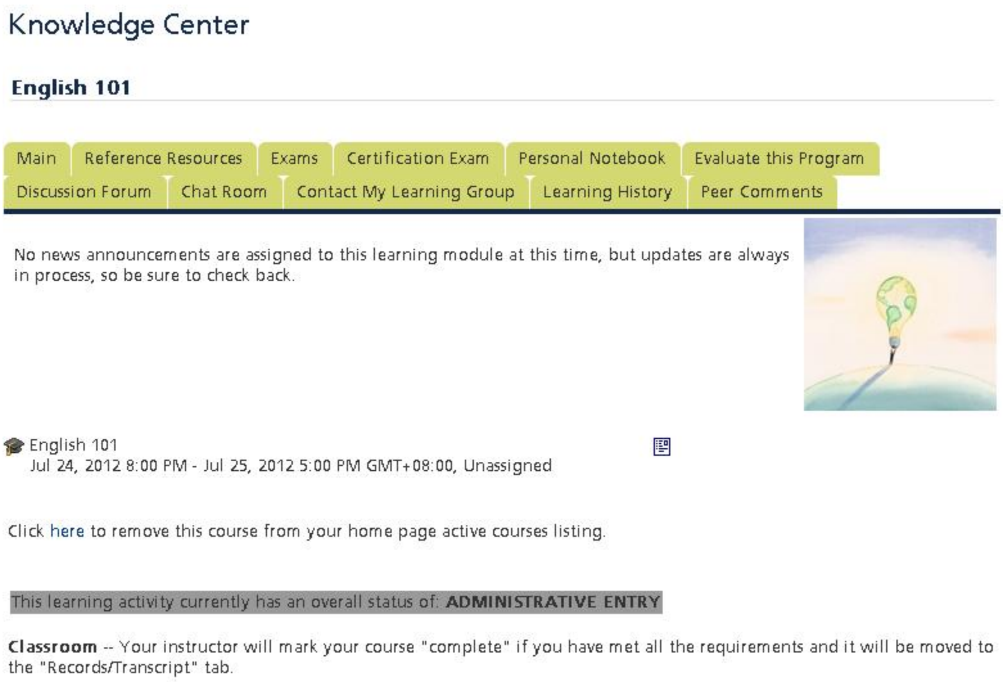
2.Choose a Learning Module.

3.Click on the Session Properties tab in the left navigation pane.



4.Click the **Knowledge Center Preview**. The *Knowledge Center* screen appears.





5.Click the **Wiki** Link.

Confluence Wiki Integration

Introduction

User can access Confluence seamlessly with a wiki url, which is pre-configured in the Catalog Editor. This integration is further enhanced to automate the creation of Confluence spaces, user groups and access control.

Setting up the Talent Suite and Confluence

In Confluence, the 'Remote API (XML-RPC & SOAP)' setting must be turned on. This can be done by logging into Confluence as an Admin: Browse Confluence **Admin > General Configuration**, the API setting can be found in the '**Feature Settings'** section.

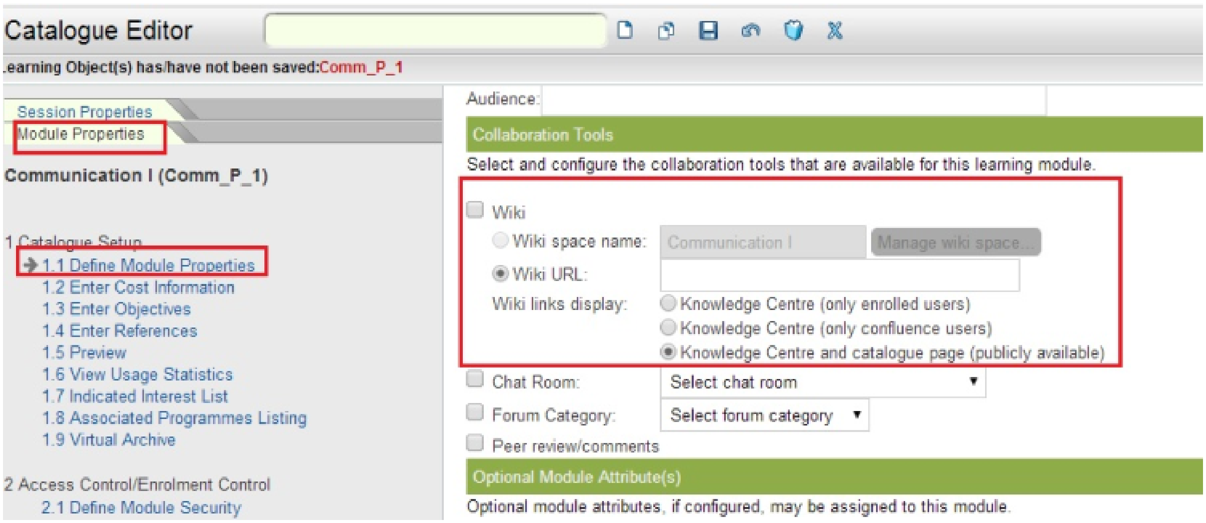
In the Talent Suite, these settings have to be added to ekp.properties:

```
wiki.rpc.soap.service=http://<confluence
domain>/rpc/soap-axis/confluenceservice-v1
# The specified user should have enough rights to create space in
Confluence.
wiki.rpc.username=<username;gt
wiki.rpc.password=<password;gt
wiki.rpc.tokenCacheSec=60
wiki.editspace.url=http://<confluence
domain>/spaces/editspace.action?key={0}
wiki.space.url=http://<confluence domain>/display/{0}/Home
```

Creating Spaces and User Groups

Catalog Editor, user can manage the wiki function in the "Wiki" section. There are two options:

1. "Wiki space", which will automate space creation and create a user group for the course. Space name will be same as module title; and the user group will be identified by module id. User can manage the space by clicking "Manage wiki space...", which would forward to the Space Admin page in Confluence.
2. "Wiki URL", which is the original url for linking to external resources



Course CSV Data Loader

Talent Suite supports the bulk import of Courses via the Course CSV Data Loader. For more information, please refer to EN145 Data Import Export.

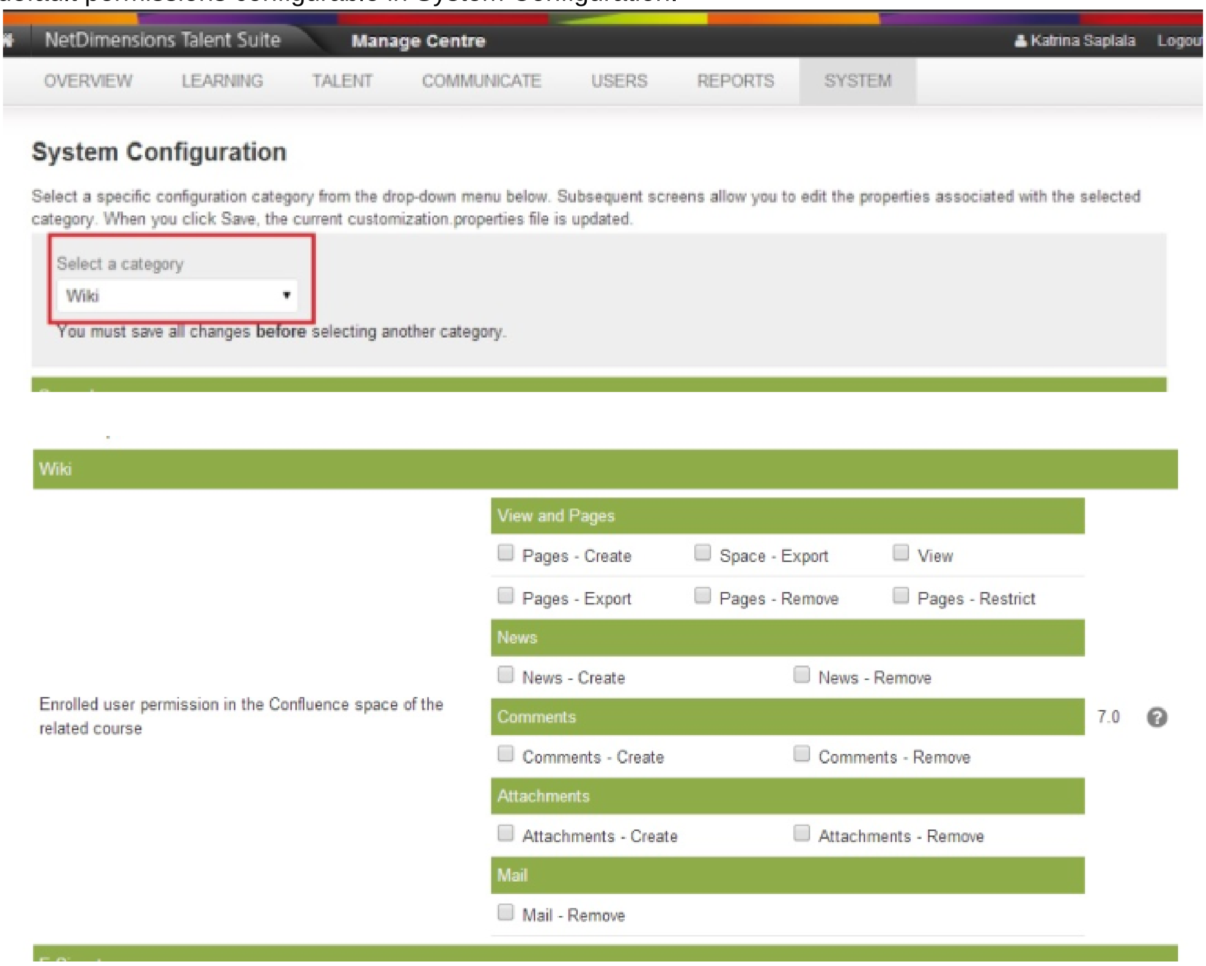
User Enrollments

User will be added to the course user group in Confluence when he is enrolled to the course; while he will be removed when he is withdrawn. Thus, by maintaining permissions on the user group, user can manage all enrolled users' access rights to the space.

In Catalog Editor, click "Manage wiki space..." to go Space Admin > Permissions, the user group can be found under the Group section and various permissions can be configured.
A wiki link will be shown in Knowledge Centre.

Configuring Permissions

Since space permissions are likely to be similar, NetDimensions Talent Suite application has made default permissions configurable in System Configuration.



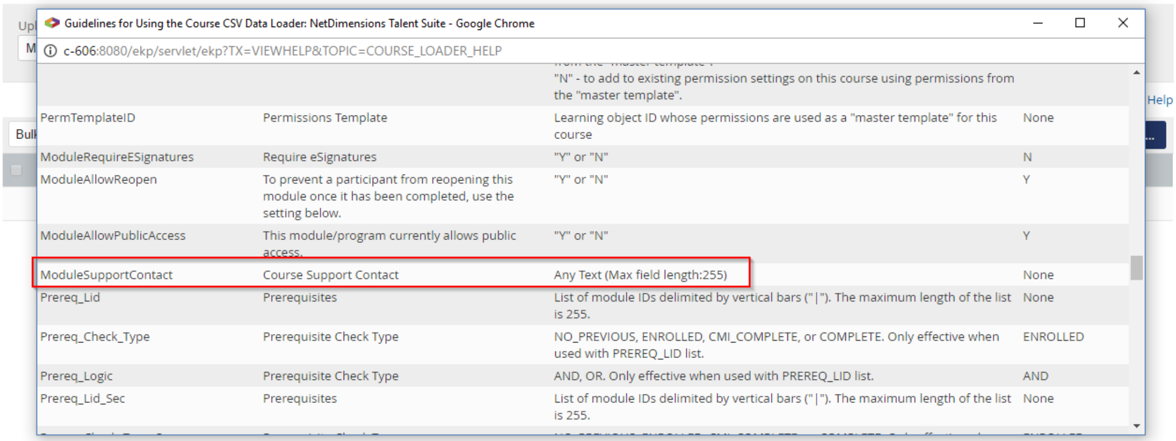
In System Configuration, under "Wiki" section, user can find all permissions that can be granted to space user group, namely:

Permission	Description
View	View all content in the space
Pages	Create Create new pages and edit existing ones
Pages	Export Export pages to PDF, Word
Pages	Restrict Set page-level permissions
Pages	Remove Remove pages
Space	Export Export space to HTML or XML
News	Create Create news items and edit existing ones
News	Remove Remove news
Comments	Create Add comments to pages or news in the space
Comments	Remove Remove the user's own comments
Attachments	Create Add attachments to pages and news
Attachments	Remove Remove attachments
Mail	Remove Remove mail

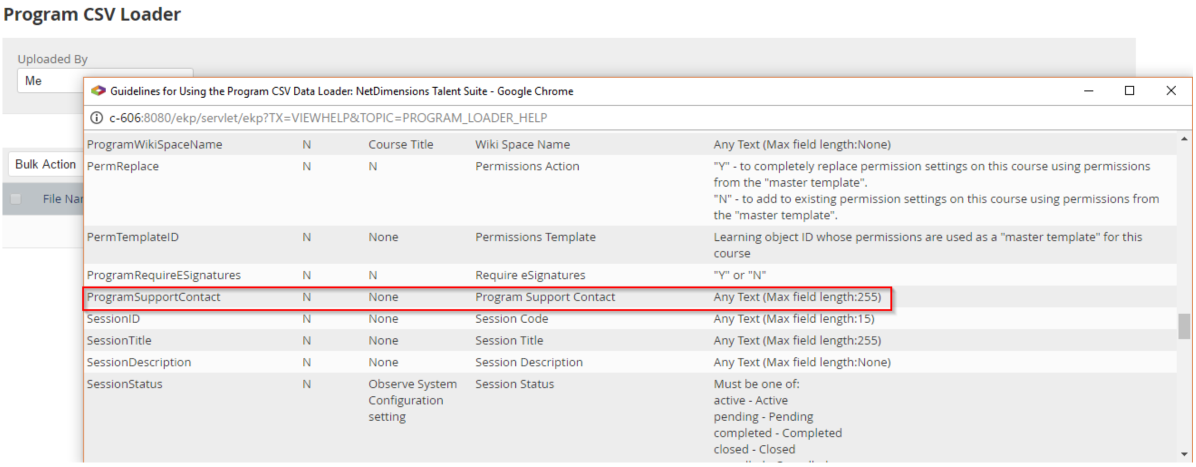
Support Contact field length

The Support Contact field length in the Course CSV Loader can support up to 255 characters, allowing users to add more information, such as HTML tags, providing links to directly write an e-mail, etc.

Course CSV Loader



The same applies for *Program CSV Loader* as shown below:


Program CSV Loader
Uploaded By
Me
Bulk Action
File Nar
Guidelines for Using the Program CSV Data Loader: NetDimensions Talent Suite - Google Chrome
c-606:8080/ekp/servlet/ekp?TX=VIEWHELP&TOPIC=PROGRAM_LOADER_HELP
ProgramWikiSpaceName N Course Title Wiki Space Name Any Text (Max field length:None)
PermReplace N N Permissions Action "Y" - to completely replace permission settings on this course using permissions from the "master template". "N" - to add to existing permission settings on this course using permissions from the "master template".
PermTemplateID N None Permissions Template Learning object ID whose permissions are used as a "master template" for this course
ProgramRequireESignatures N N Require eSignatures "Y" or "N"
ProgramSupportContact N None Program Support Contact Any Text (Max field length:255)
SessionID N None Session Code Any Text (Max field length:15)
SessionTitle N None Session Title Any Text (Max field length:255)
SessionDescription N None Session Description Any Text (Max field length:None)
SessionStatus N Observe System Configuration setting Session Status Must be one of: active - Active pending - Pending completed - Completed closed - Closed

Repository Manager

(applies to)

The Repository Manager allows you to upload and manage files as well as create the folders to which you upload these files. From the Repository Manager you may:

1. Create folders
2. Delete folders
3. Modify file properties and access rights
4. Modify folder properties and access rights
5. Move or Copy files among different folders
6. Upload files using the Repository Manager

Accessing the Repository Manager

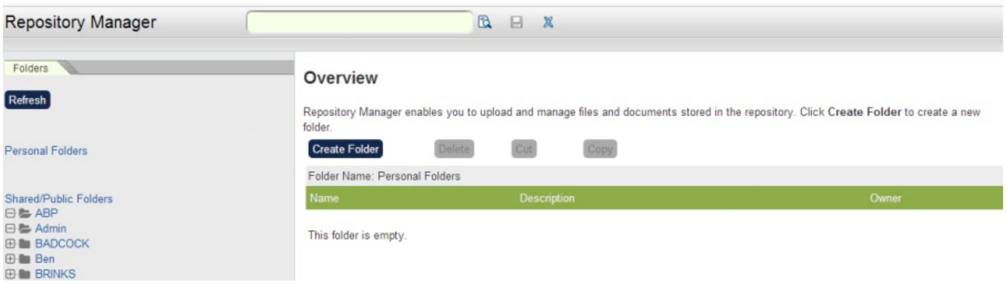
To access the *Repository Manager*, click **Manage Center > Learning > Repository > Repository Manager**. The *Repository Manager* page opens in a separate window.

Notice that Repository Manager segregates folders under your control (Personal Folders) from those that have shared access rights (Shared/Public Folders).

Adding Folders

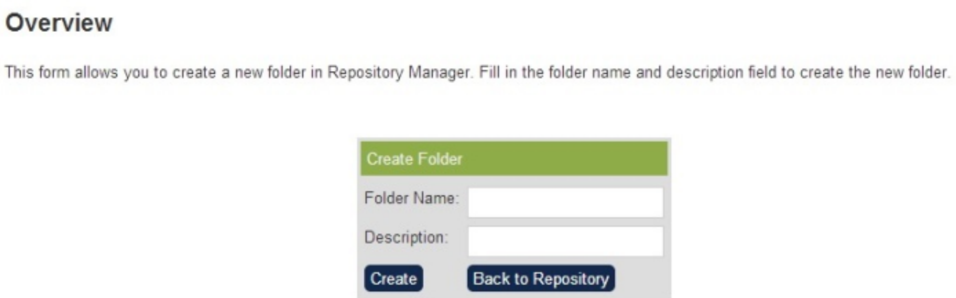
To create a new folder:

1.Click **Create Folder** in the *Repository Manager* screen. The *Create Folder* screen appears.

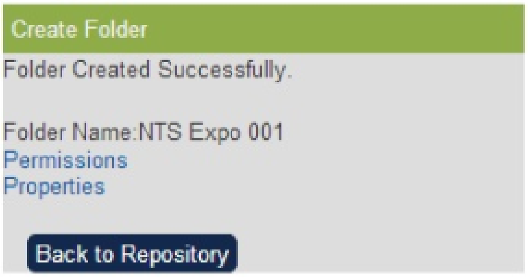


2.Enter the new name of the folder in the Folder Name field.

3.Enter a description in the Description field.



4.Click **Create**. The application returns an acknowledgement.



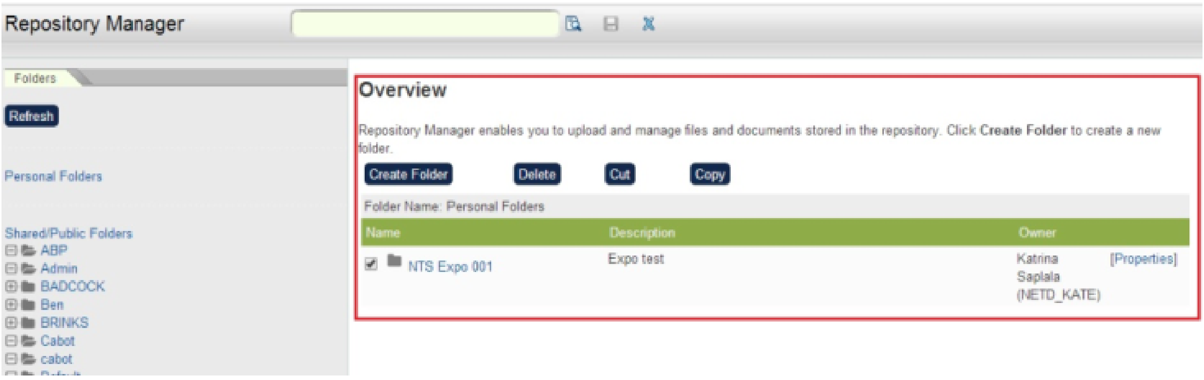
5.Click **Back to Repository**. The *Repository Manager - Overview* screen appears with the new folder.

Files

To copy, cut and paste files from one folder to another within Repository Manager:

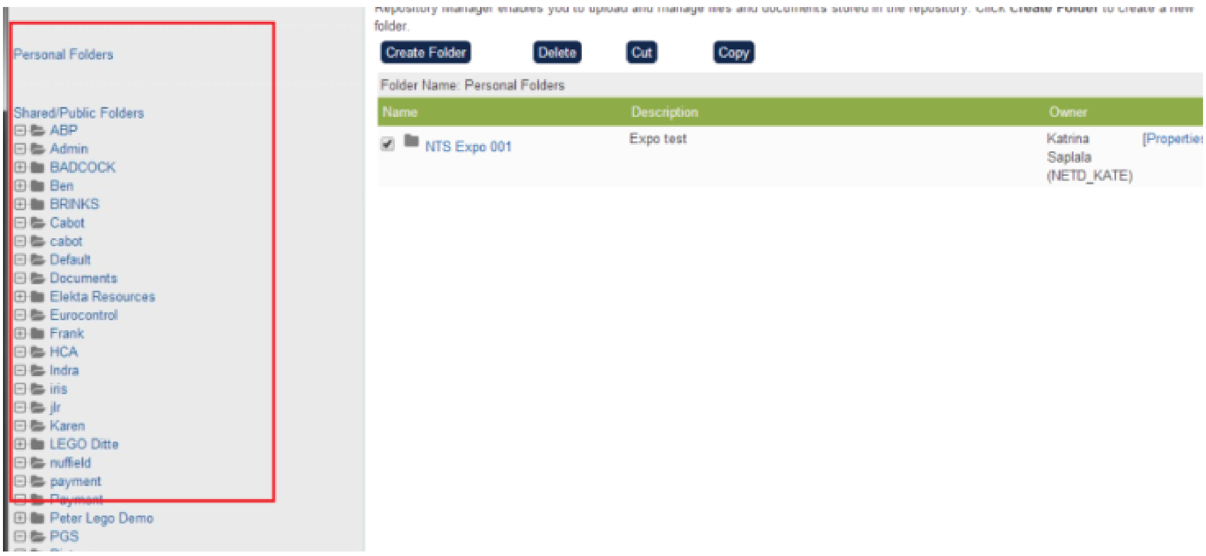
1.Locate the file in the Repository Manager and employ the incorporated search facilities.

2.Click on the folder in the left Folders column. The *Overview* screen appears.

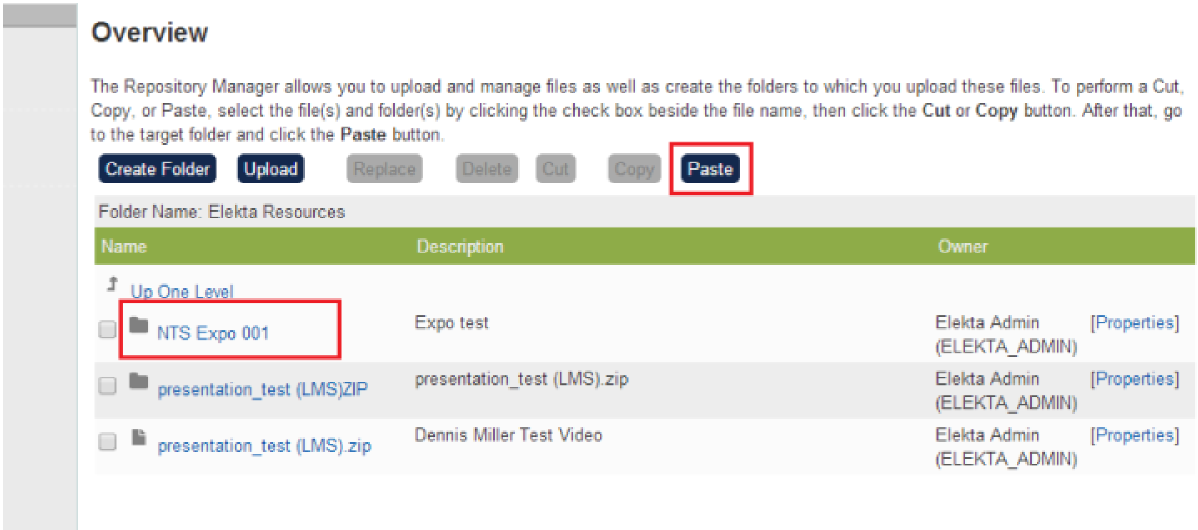


3.Click the box or files you want to copy or cut. To view the file, click on the file's hyperlink.

4.Select the destination folder or sub-folder where the file will be copied (you may also copy a file into the same folder or sub-folder).



5.The *Overview* screen appears. Click **Paste**. The folder will be copied to the selected folder.



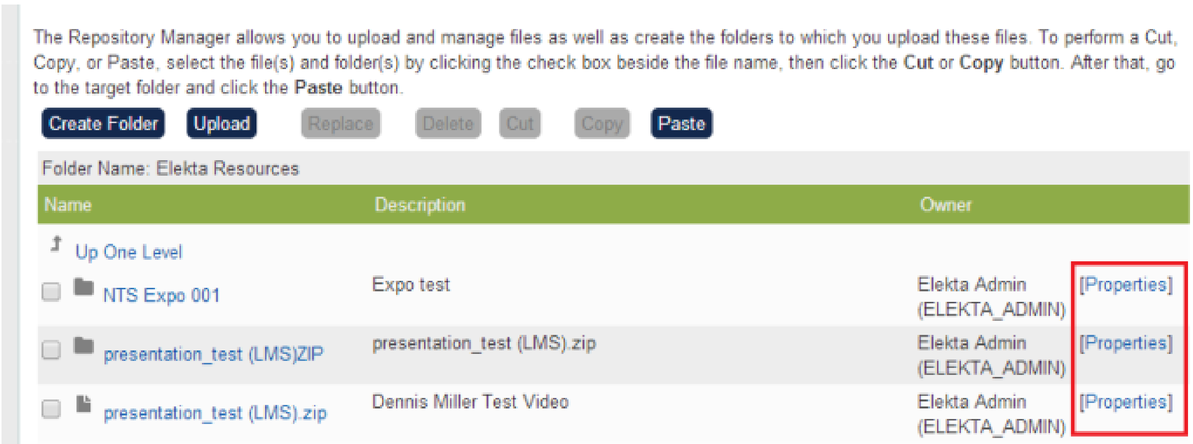
Edit File/Folder Properties

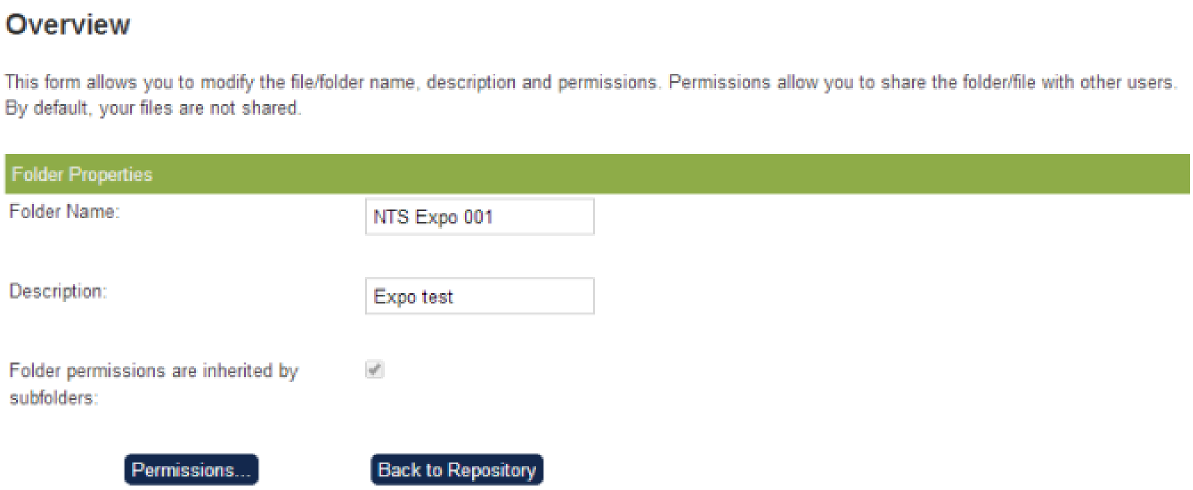
To edit the properties of a file:

1.Locate the file in the Repository Manager.

2.Click on the folder in the left Folders column. The Overview screen appears.

3.Edit the properties by clicking on the **Properties** hyperlink. The *Folder Properties* screen appears.





4.Enter the new folder name in the Folder Name field.

5.Enter/Edit the description in the Description field.

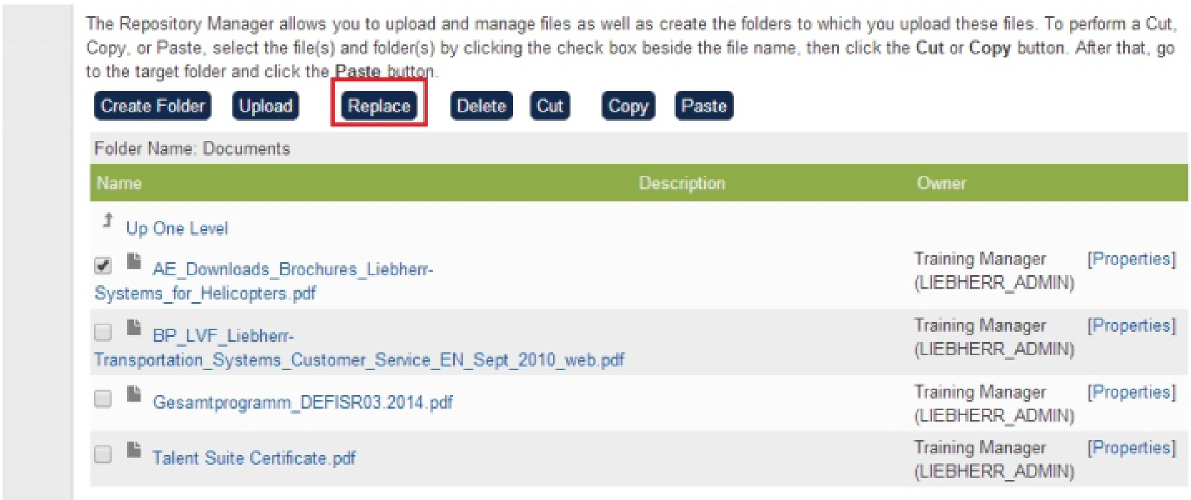
6.Click **Save** on the toolbar.

7.Proceed to edit permissions.

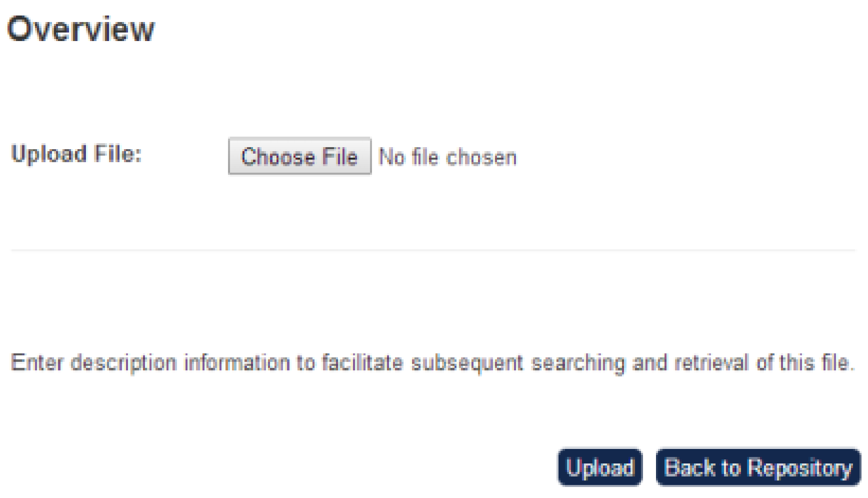
Replacing Files

To replace a file within Repository Manager:

1. Locate the file in the Repository Manager. Employ the incorporated search facilities.
2. Click on the folder in the left Folders column. The Overview screen appears.
3. Click on the box by the file you wish to replace.
4. To view the file, click on the file's hyperlink.
5. Click **Replace**.



6.The screen refreshes. Click the **Browse** button to select the file.

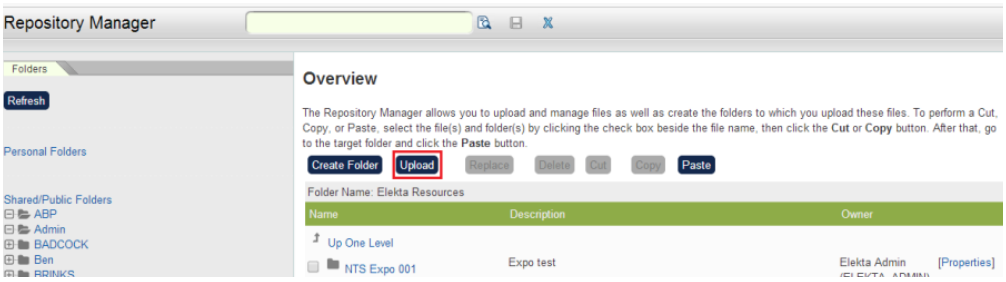


7.Click the **Upload** button to replace the file.

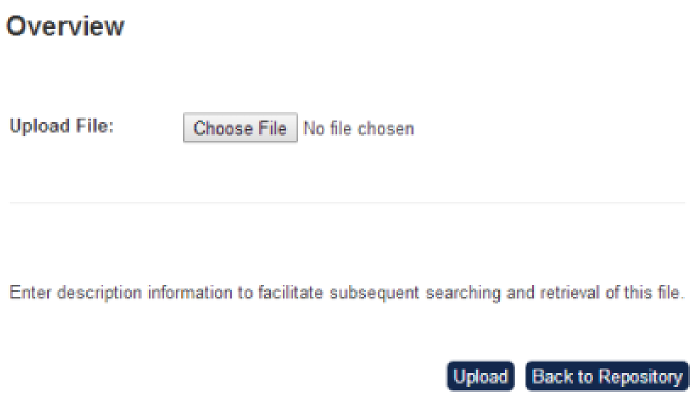
Upload Files Using the Repository Manager

To upload files into a folder:

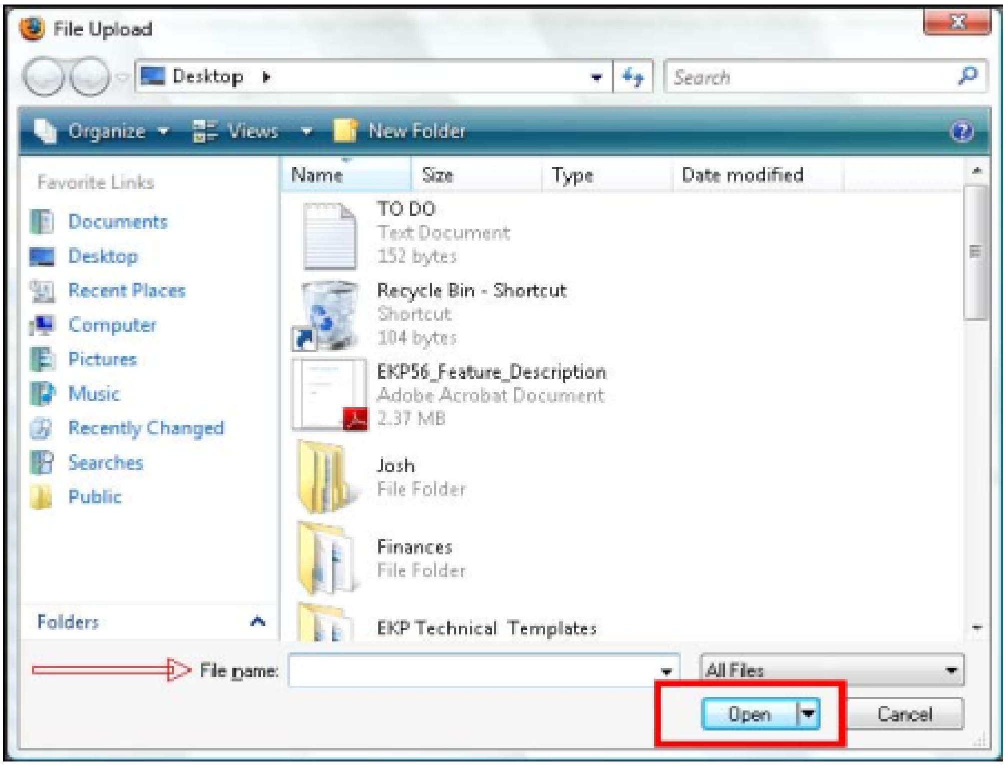
1.Select the folder (or sub-folder) from the left Folders column. Click **Upload**.



2.The screen refreshes.



3.Click **Browse**. A separate *Windows Choose File* screen opens.



3.Choose the file and click **Open**. The file name is copied to the **Upload File** field.

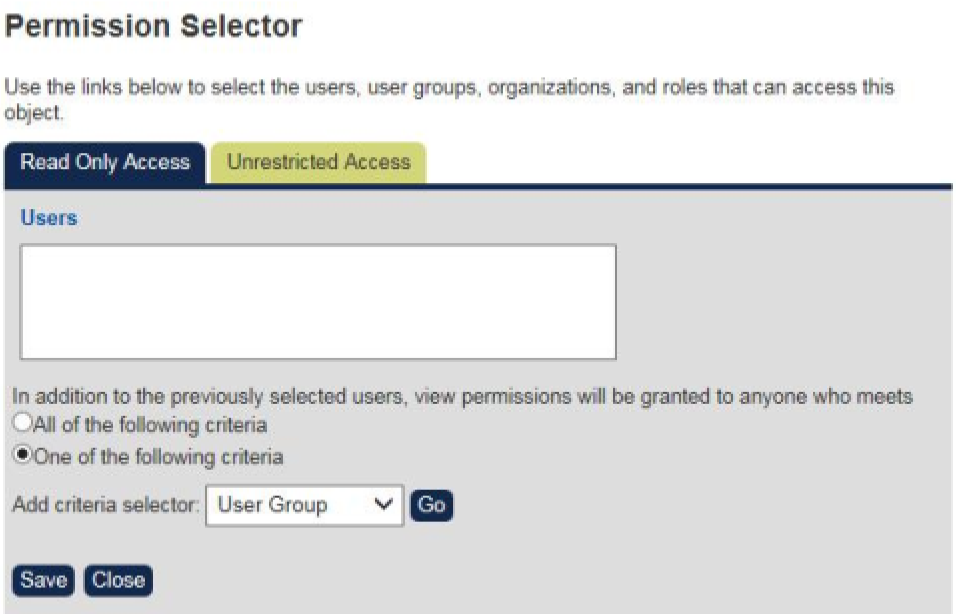
4.Click **Upload**. The application returns an acknowledgement.

5.From here proceed to define file properties. Edit the properties by clicking on the **Properties** hyperlin k. The *File Properties* screen appears:

6.Click **Save**. The screen refreshes.

7.Click the **Permissions** hyperlink.

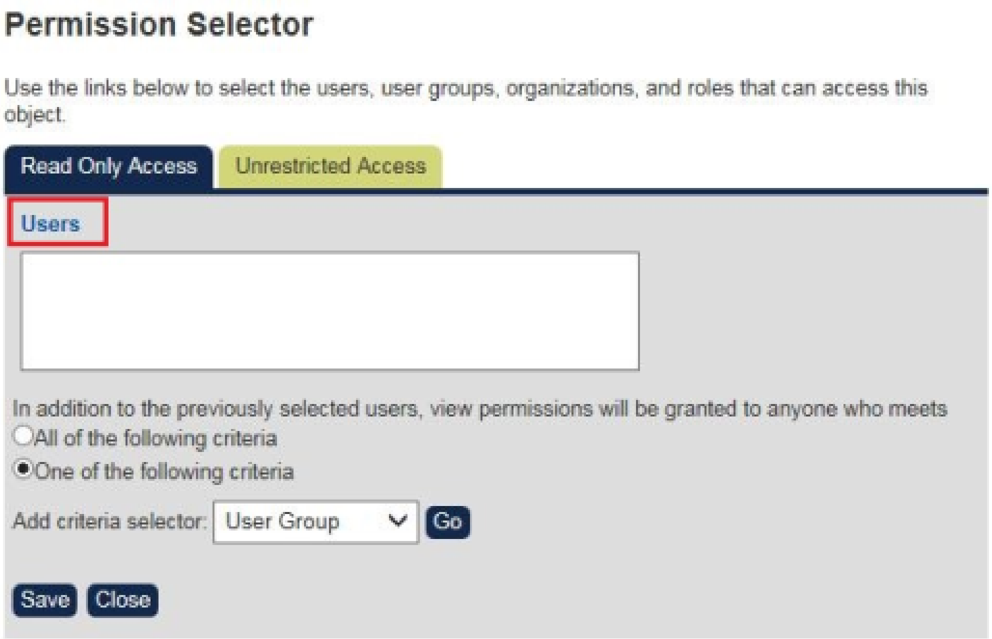
8.Define Read and/or Write access rights in the *Permission Selector* screen that appears.



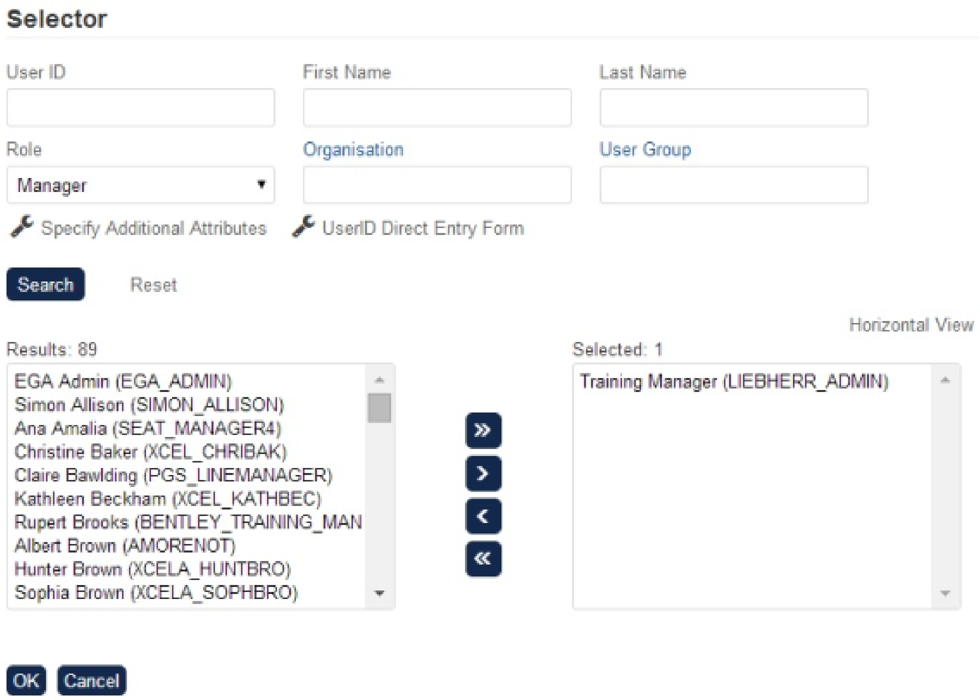
Prior giving permission to a user or group of users, you need to select first the type of access you want to give to the user. There two types of access you can give to a user, namely;

1. Read Access
2. Unrestricted 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.



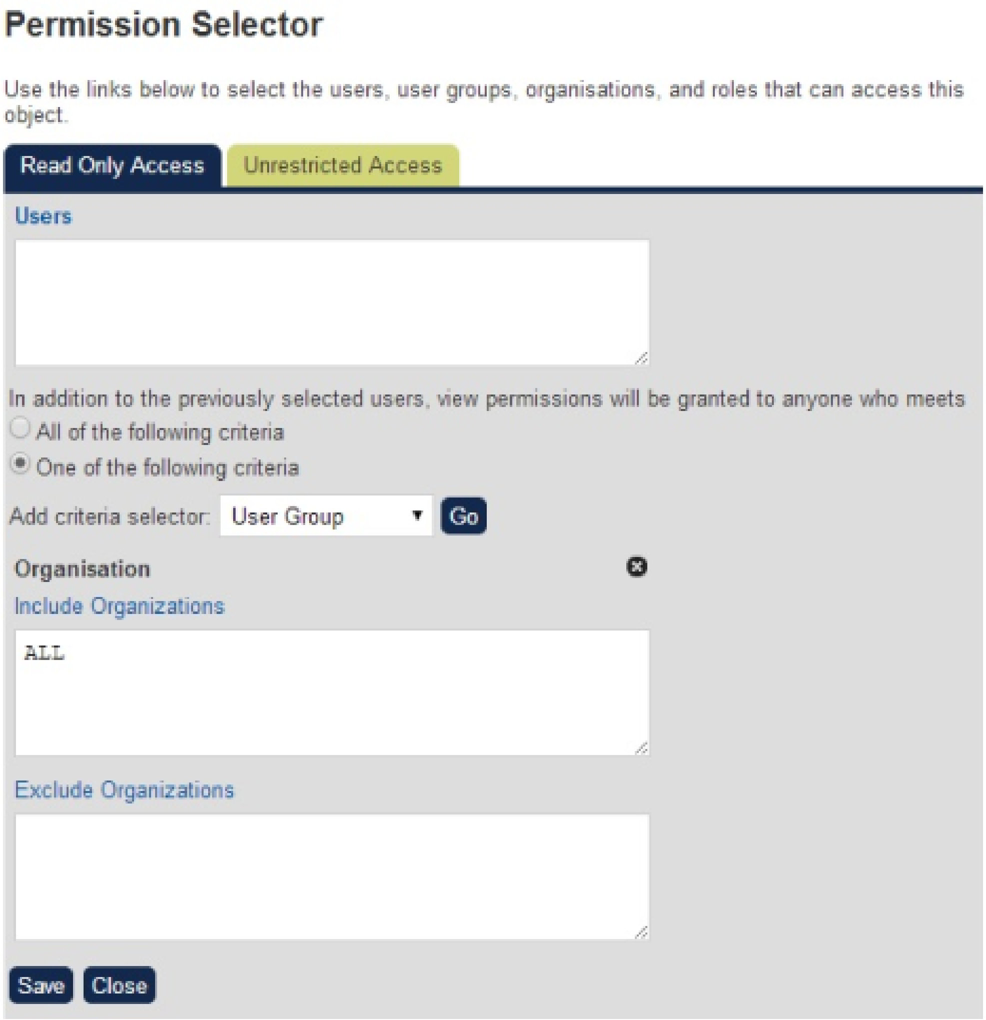
This opens the menu for selecting user.



Use this menu to select for the user.

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

1. ***All of the following criteria***
    a. This means that viewing permission can be granted to all users belongs to the criteria defined in the Add criteria selector. For instance that user added the criteria Role and Organization as shown in the image below.
    b. This means that the user must belong to the roles AND organization in order for the user to access the permission to view the report.



One of the following criteria

a. This means that viewing permission can be granted to all users belongs to any of the criteria defined in the Add criteria selector.
b. This means that the user must belong to the roles OR organization in order for the user to access the permission to view the report.

Add criteria selector

a. This allows you to add criteria. To add the criteria, click the selector drop-down button and then select the preferred criteria.

Note: For every selected criterion, a criterion box will be displayed. To select a specific user, group or organization that belongs to the criteria, click the link positioned at the right top of each box.

Click **Save** at the bottom of the screen.

Repository Manager Performance Enhancements

The Repository Manager has been enhanced to allow permissions management at the folder level, thus greatly increasing performance for large repositories (e.g. 50,000 entries or more). This is enabled by a new System Configuration setting "Enforce Repository Permissions at Folder Level Only". By default, ZIP folder permissions are now managed at the folder instead of file level, but other files are controlled by this new configuration setting.

Enrollments

Catalog and courseware management involves the:

1. Creation, set up and management of catalogs
2. Definition and maintenance of:
3. Languages
4. Subjects
5. Geographic Regions
6. Financial categories (i.e. Cost Accounting)
7. Creation of catalog entries
8. Management of catalog entries including the updating of entries, display options (that is whether to display or not) and the inclusion of reference and other materials (e.g. exams)

It also involves the establishment and maintenance of enrollment policies, which is the focus of this section.

Enrollment Policies

(applies to NetDimensions Performance NetDimensions Learning)

Enrollment policies handle the workflow for enrollments. The NetDimensions Talent Suite application ships with two predefined workflows:

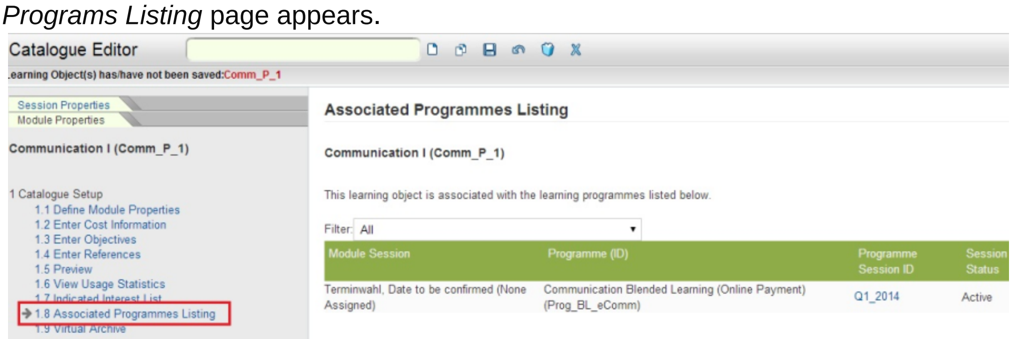
1. A one-step policy (enroll directly)
2. A two-step policy (the user's manager needs to approve)

You can create as many enrollment policies as you need with any number of steps. The Enrollment Policy Editor can be accessed from the module properties of a learning object or directly from the Catalog Manager screen.

View Learning Programs Associated With a Course/Session

(applies to NetDimensions Performance NetDimensions Learning)

When editing a course it is often useful to be aware of which Learning Programs will be affected. This information can be easily viewed and filtered for a particular session of the course.
To do so, click on **Associated Programs Listing** in the *Module Properties* tab. The *Associated Programs Listing* page appears.

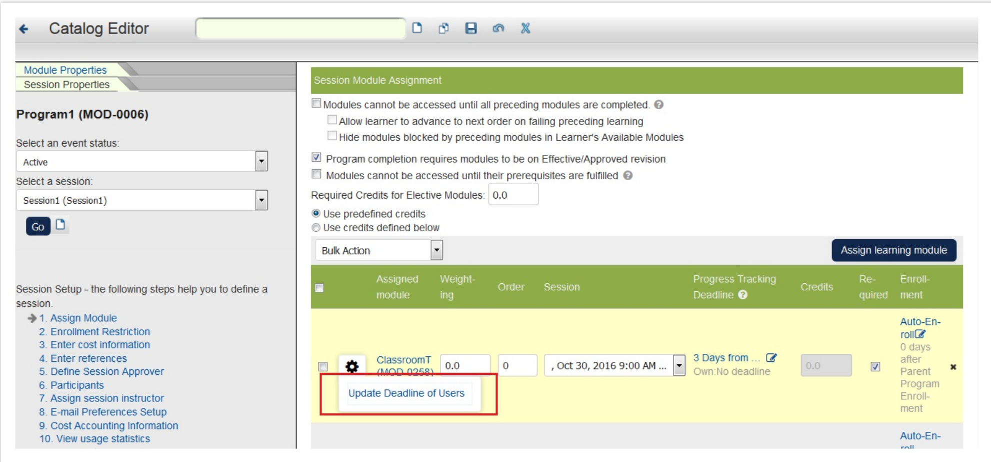


Progress Tracking Deadline

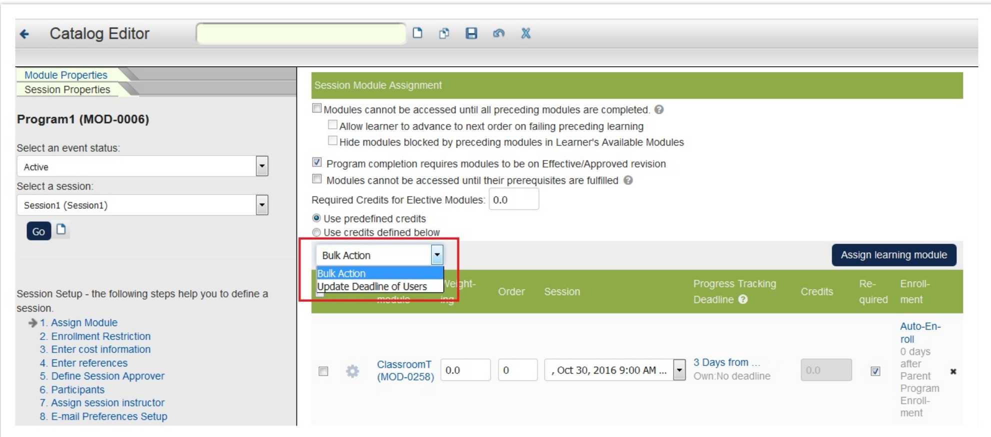
This feature allows Administrators to update the progress tracking deadline of a module for enrolled users and all open transcripts.

At program level

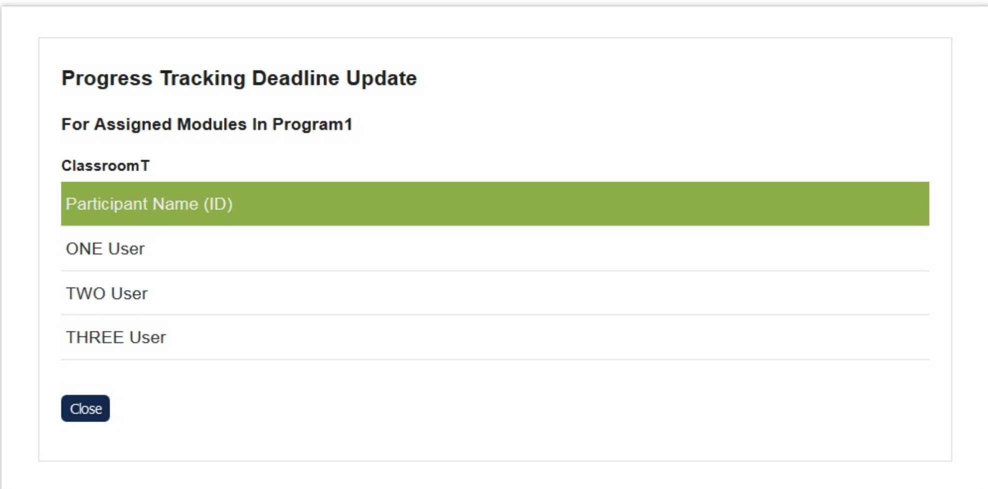
At Program level, this can be accessed through **Catalog Editor > Session Properties > Session Module Assignment > Assigned module**. Click on the gear icon and select "***Update Deadline of Users***".



This function is also available as a bulk action.



Executing the update function will apply the new deadline of the "Progress Tracking Deadline" column to all open transcripts.A progress indicator will appear as the process is ongoing. After this a pop-up screen will show the status updates.

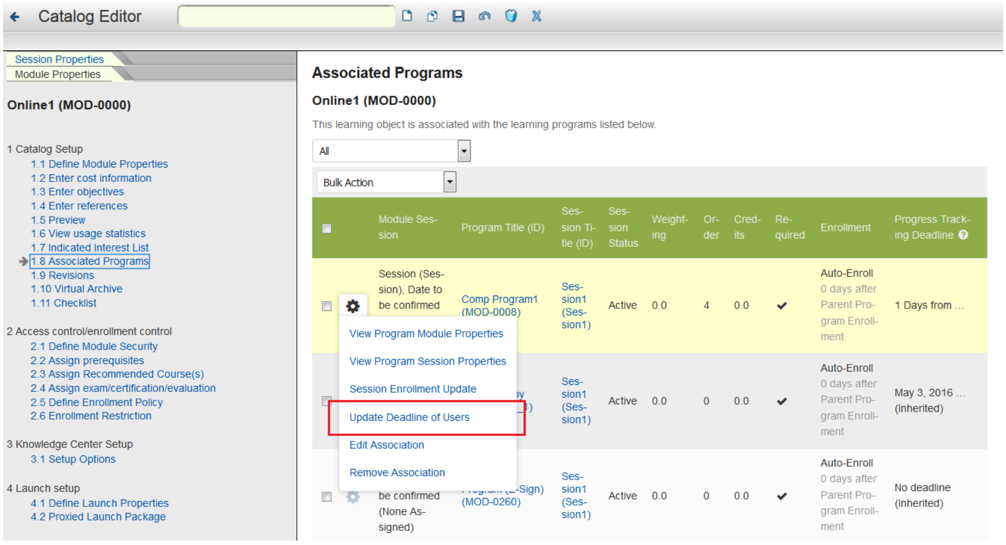


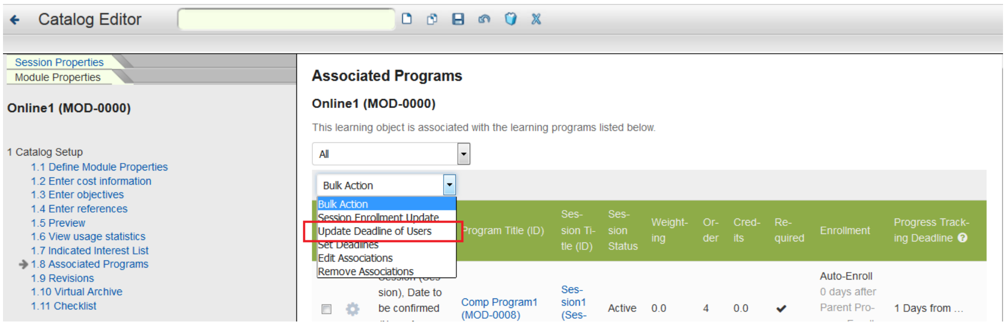
At module level

At module level, this can be accessed via:

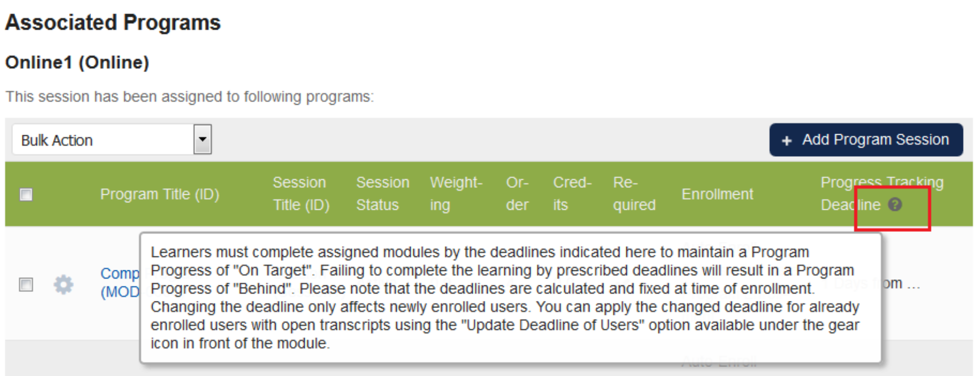
1. **Catalog Editor > Module Properties > Associated Programs**
2. **Catalog Editor > Session Properties > Associated Programs**

The "***Update Deadline of Users***" option can be accessed in the gear icon in both locations. The progress indicator and the pop-up screen showing status updates are available in this level as well.





The tooltip of the Help icon in the Progress Tracking Deadline column has been revised to inform the users about the changes.



E-mail

(applies to NetDimensions Talent Suite)

E-mail is one of the communications options offered by the Talent Suite. You may send the individual to pre-specified e-mail addresses (e.g. an internal or an external e-mail address) on an ad-hoc basis or on an event-triggered basis using a predefined email template.

Email messages may also be sent in bulk (Either using or not using an e-mail template.). The E-mail Template Editor allows you to create e-mail message templates that both incorporate a predefined message and specify to whom the message is to be sent when an event occurs. For example, a message may be sent upon a participant's successful enrollment in a course both to the participant and his immediate manager.

To create and manage e-mail templates, first access the E-mail Template Editor.

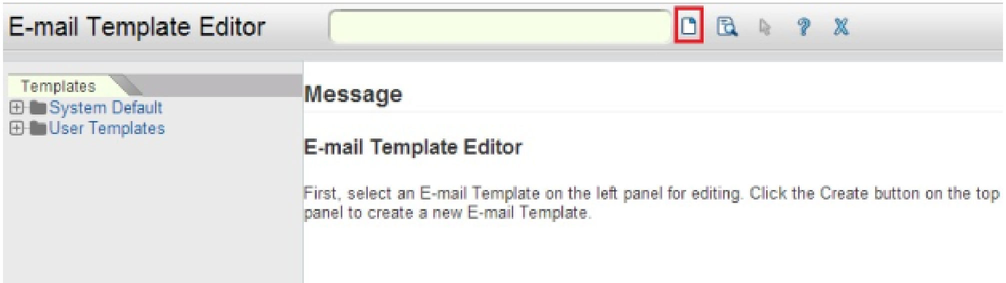
Accessing the E-mail Template Editor

To access the E-mail Template Editor from the Catalog Manager, access **Manage Center > Communicate > Email Manager > E-mail Template Editor**. The *Email Template Editor* screen appears in a separate window.

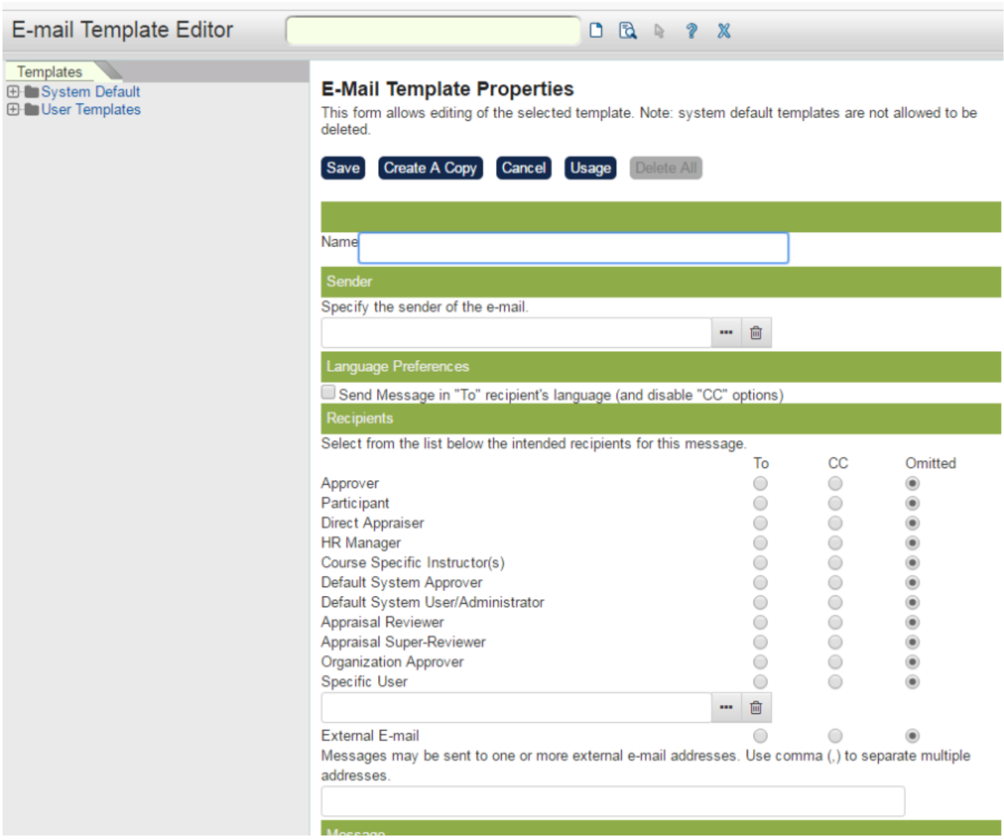
Creating E-mail Templates

To create a new e-mail template from the *E-mail Template Editor*:

1.Click the **Create Template** icon.



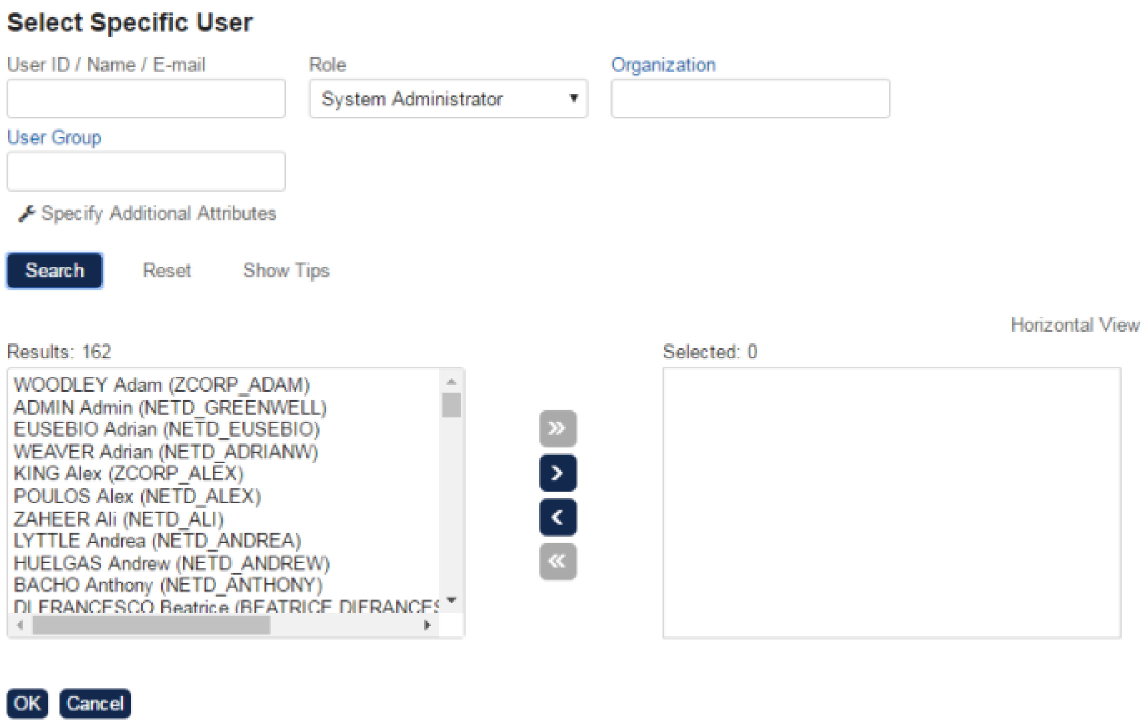
2.The *E-mail Template Properties* screen appears.



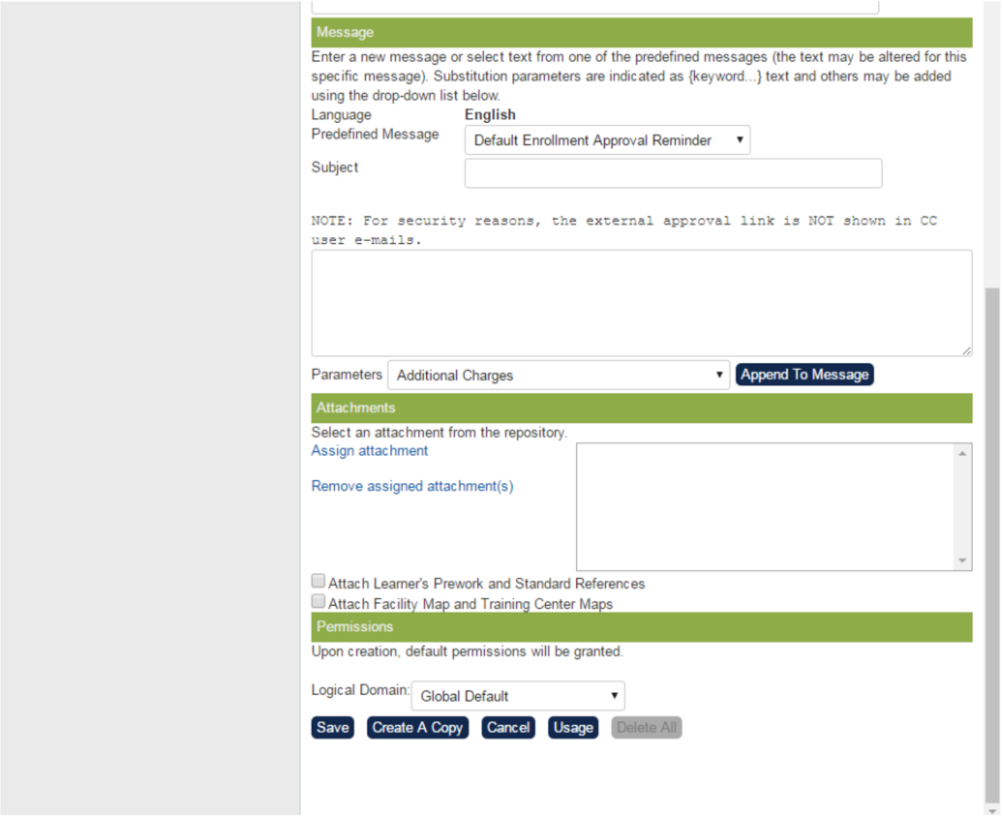
Top half of the Email template

3.The *E-mail Template Properties* screen allows you to enter the following parameters:

1. **Name** This field allows you to enter the name of the e-mail template to be created.
2. **Specifying the Sender of the E-mail** This allows you to specify the sender of the email. To specify the sender of the email, click the Selector button. The menu for selecting a specific user will be displayed. Use this menu for selecting a sender.

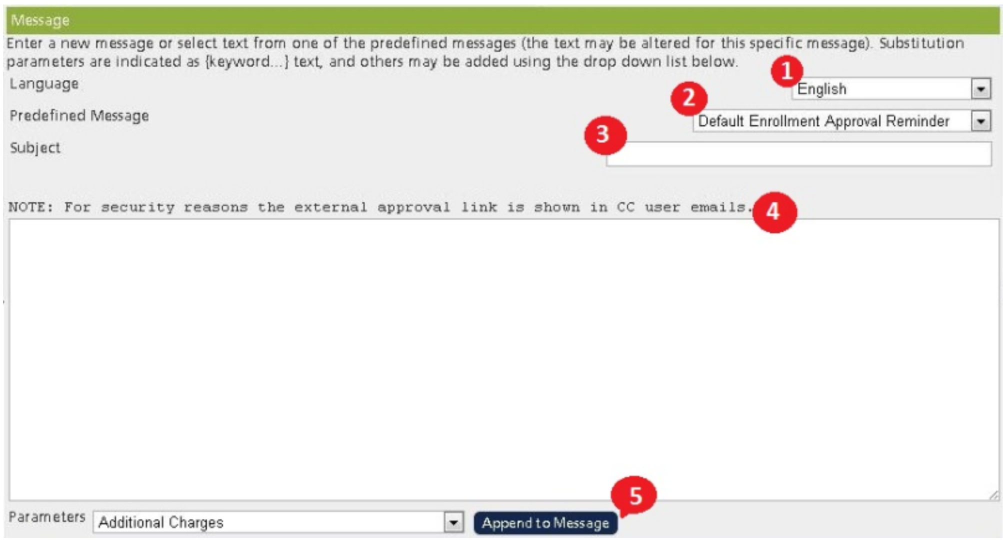


1. **Selecting Intended Recipients of the E-mail** To select the recipient:
2. Click the To radio button of the recipient(s) who will directly receive the email.
3. Click the CC radio button of the recipient(s) who will be given a copy of the email.
4. Click the Omitted radio button of the recipient(s) who you do not want to include as the recipient of the email.
5. Selecting a Specific User as a Recipient of the email: If the recipient is not included on the list, you can also select a specific user as the receiver of the email.
    a. Select first whether the specific user (recipient) is direct (To) receiver of the email or copied (CC) receiver of the email.
    b. Click the Selector button under the Specific User. Once clicked, the menu for selecting a specific user is displayed. Use this menu in selecting a user.
    c. To remove the specific user, click the Trash icon
6. Sending messages to external e-mail addresses: You can also send one or more messages to external e-mail addresses.
    a. Select **To** / **CC** / **Omitted** for the recipient(s).
    b. Enter the external e-mail address to the entry box located under the External E-mail. Use comma (,) to separate multiple addresses.



Bottom half of the email template

1. **Entering Predefined or Own Message**: You may enter your own message and subject in the Message section.



	In creating a message:
1	**Language:** You can select the language to be used in sending the message. **Note:** Users can change their language preferences in Settings and if a matching language has been configured for a template, they will receive the e-mail in their preferred language.
2	**Predefined Message:** Alternatively, you can select a pre-defined message from the drop down list appearing by the Predefined Message field. However, these predefined messages were intended for course-specific functions and not designed as general-purpose messages. If you select a pre-defined message, the message will appear in the message section. You may edit this message.
3	**Subject:** Enter the subject of your email on the subject entry field.
4	**Message Box:** The message box allows you to enter the content of your email message or edit the selected predefined messages.

5	**Append Parameters to Message:** E-mail Template Editor allows dynamic parameters to be embedded in the e-mail template, e.g. {course_title} for the course title. There are certain parameters that deal with the names of certain users: 1. Approver 2. Default System Approver 3. Denier 4. Direct Appraiser 5. Participant However, the format of the resolved name follows the configured display format within NetDimensions Performance application and is not always appropriate. Very often, names are displayed with the last name first, followed by the first name, e.g. "SMITH John". In order to make it more flexible, extra e-mail parameters have been introduced so that a user's first name (i.e. given name) and last name (i.e. family name) can be separately embedded in an e-mail template. We now have these e-mail parameters: 1. Approver Full Name (formerly Approver) 2. Approver Family Name 3. Approver Given Name 4. Course Schedule 5. Default System Approver Full Name (formerly Default System Approver) 6. Default System Approver Family Name 7. Default System Approver Given Name 8. Denier Full Name (formerly Denier) 9. Denier Family Name 10. Denier Given Name 11. Direct Appraiser Full Name (formerly Direct Appraiser) 12. Direct Appraiser Family Name 13. Direct Appraiser Given Name 14. Old Session 15. New Session 16. Participant Full Name (formerly Participant) 17. Participant Family Name 18. Participant Given Name 19. Session Code 20. Session Title 21. Display custom text For example, to produce the line "Dear John Smith" rather than "Dear SMITH John", we can use the Participant Given Name parameter followed by the Participant Family Name parameter in the e-mail template. Apart from the parameters mentioned above, there are other parameters that can be embedded in the e-mail template (please see the list on the table below):

{AdditionalCharges}	{enrollment_date}	{total_number_of_tokens_purchased}
{address}{right_to_reply_link}	{evaluation_workflow_launch_link}	{total_token_cost_excl_tax}
{approver_remarks}	{exam_name}	{total_token_cost_inc_tax}
{assessment_createDate}	{external_approval_link}	{total_token_tax}
{assessment_desc}	{external_training_comments}	{training_center_contact_info}
{assessment_reviewee}	{facility_code}	{training_center_description}
{assessment_instruction}	{manager_name}	{training_center_directions}
{assessment_participant_duedate}	{instructor_email}	{training_center_name}
{assessment_primaryReviewer}	{instructor_name}	{training_center_venue_details}
{assessment_title}	{join_date}	{PaymentReference}
{catalog_search_link}	{launch_appraisal_link}	{user_attribute_1}
{certification_description}	{venue}	{user_attribute_2}
{certification_expiration_date}	{location_code}	{user_attribute_3}
{certification_id}	{need_hotel}	{user_attribute_4}
{certification_issued_by}	{notify_email}	{user_attribute_5}
{certification_name}	{org_goal_title}	{user_attribute_6}
{certification_days_valid}	{personal_goal_title}	{user_attribute_7}
{charge_to_personal_training_budget}	{phone}	{user_attribute_8}
{charged_costcenter}	{postal_code_zip}	{user_group}

{city}	{preferred_date}	{participant_id}
{company_name}	{preferred_location}	{user_org}
{cost_center_name}	{PriceInfo}	
{country_code}	{province_state}	
{Coupon_ID}	{purchased_tokens}	
{course_cost}	{purchased_tokens_pay_ref}	
{course_description}	{reason_to_enroll}	
{course_id}	{RefundAmount}	
{course_optional_pay_items}	{RefundAmountOptPayItems}	
{course_schedule}	{request_date}	
{course_title}	{reviewer_given_name}	
{current_date_and_time}	{reviewer_family_name}	
{denier_remarks}	{room_name}	
{deptid}	{session_end_date}	
{department}	{session_start_date}	
{email}	{session_confirmation_link}	
{end_date}	{session_description}	
{employee_id}	{start_date}	

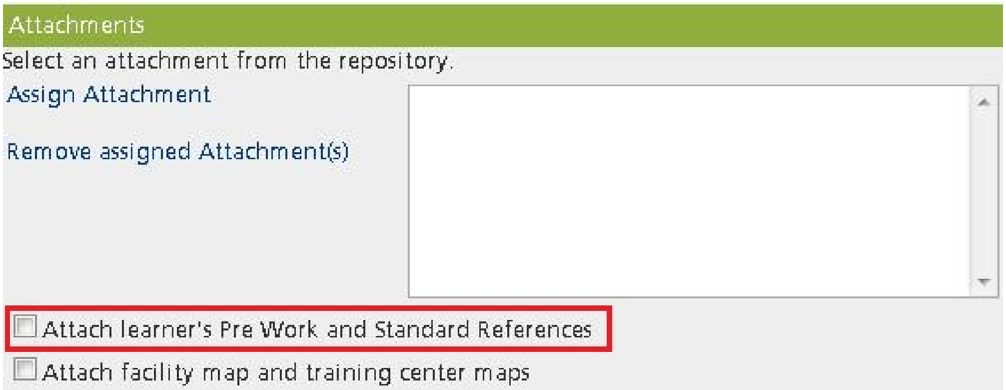
To automatically enter the specific parameters into this message (e.g. the name of the participant):

1. Select the parameter by click the drop-down menu by the Parameter field.
2. In the message box, place the cursor on the area where you wish to enter the parameter.
3. Click Append to Message.

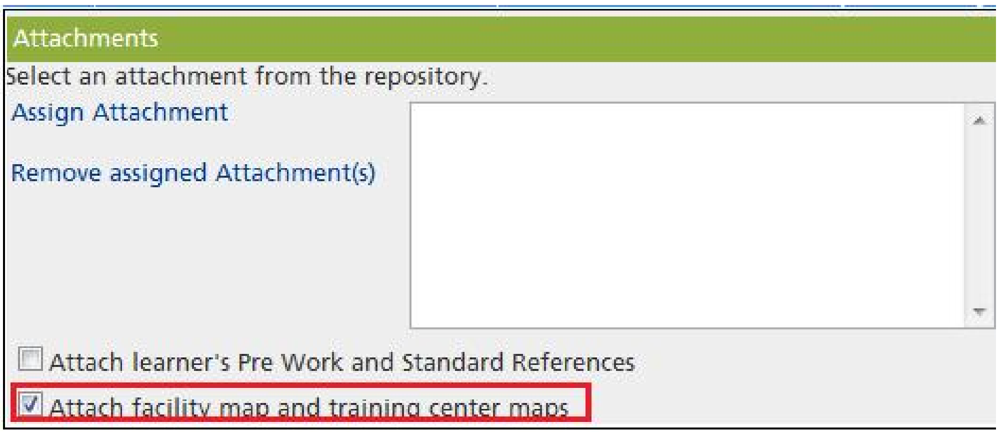
Note: You need not specify parameters for a bulk message.

Attaching Documents or Files You may attach a document or file by clicking on the Assign Attachment hyperlink and then selecting the file/document from the Repository Manager screen that appears (in a new window). To add an attachment:

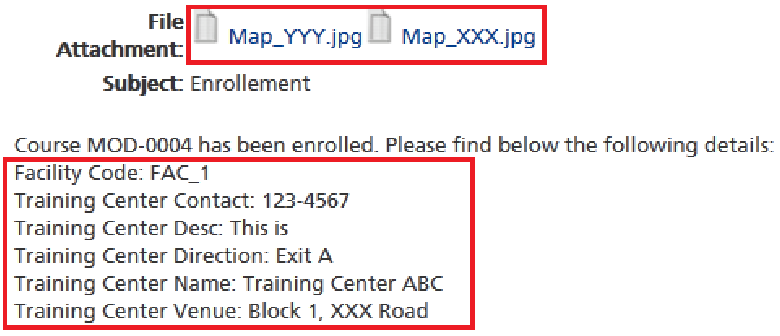
a. Click the Assign Attachment hyperlink. The Repository Manager screen appears in a separate window.
b. Select the desired file(s).
c. To remove an attachment, click on the file and click the Remove assigned Attachment(s) hyperlink.
d. **Attaching Learner's Pre Work and Standard Prefences :** Files in Reference Resource, belongs to learners' Pre work and Standard, can be easily attached to emails and send to users. Since Reference Resource contains many types of file URL, only files exited in Repository will be attached to emails. To attach the Learner's Pre Work and Standard Prefences, tick the box beside the "Attach learners Pre Word and Standard References".



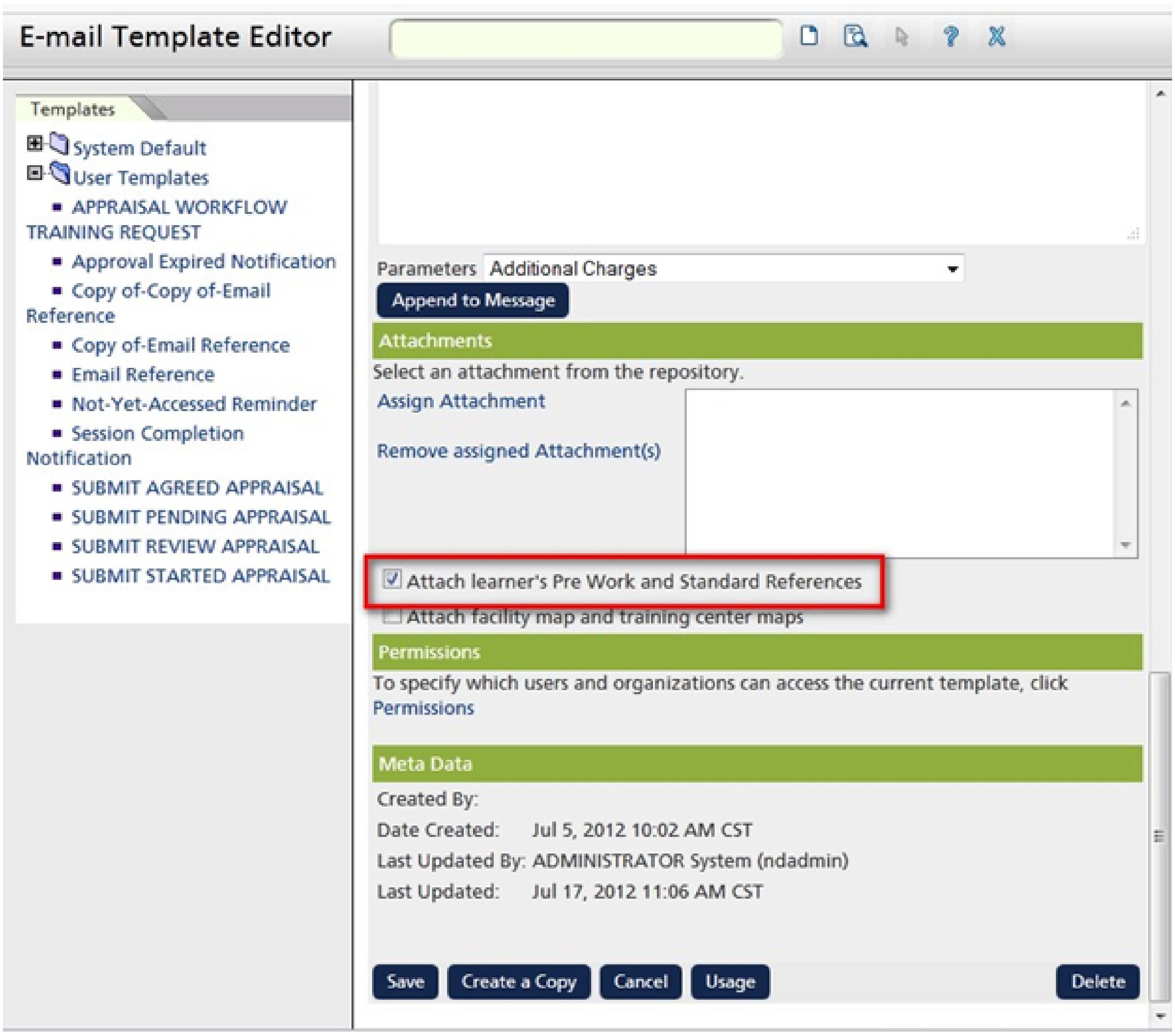
Attaching Facility Map and Training Center Maps: To attach the facility map and training center maps as to the email template, tick the box beside the "Attach Facility Map and Training Center Maps".



When users receive an e-mail using the customized template, Facility and Training Center details will be shown. Maps could also be attached to email.

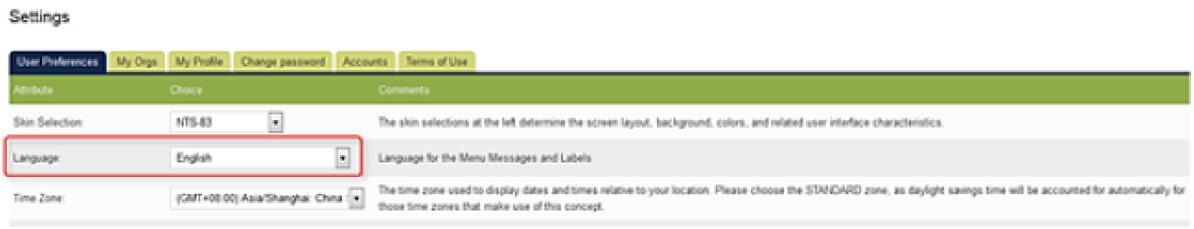


Reference Resource attachments in email template: Files in Reference Resource, belongs to learners' Pre work and Standard, can be easily attached to emails. Since Reference Resource also supports specification of a web based resource (URL), only physical files from the Repository will be attached to emails. There is only one step to complete the setting for attaching resource in email template. Check the "Attach learning's Pre Work and Standard References" option under Attachments group. In order to use the email template, please set it up in "E-mail Preferences Setup".



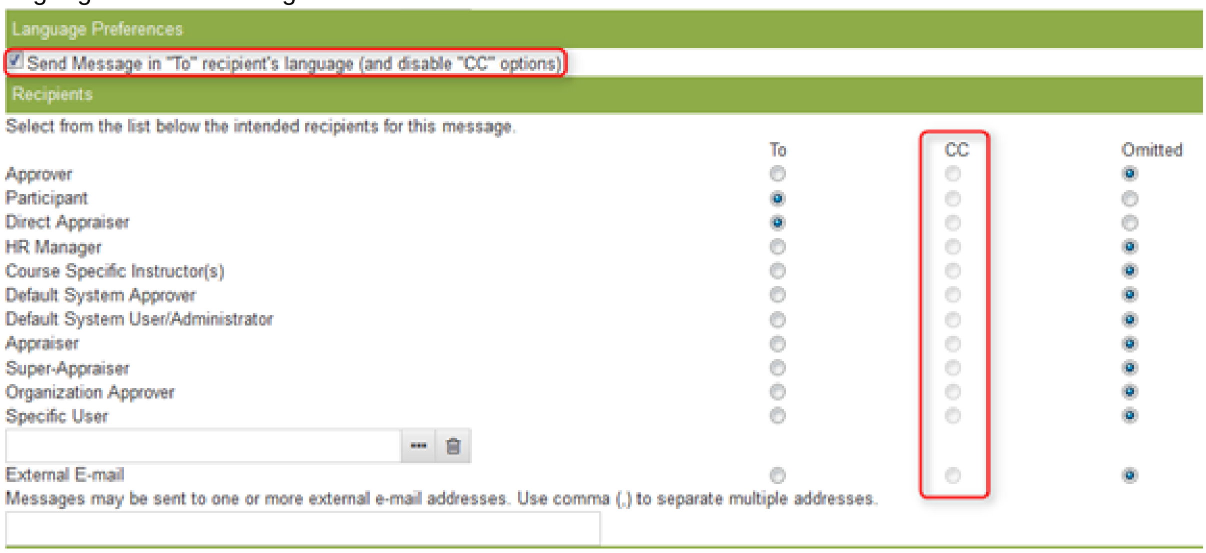
Email Templates Sent in Recipient's Language

As email template provides multi-language support, language-specific email messages can be authored. This feature is to allow the flexibility of sending an email with message based on the recipient's language preference. For example, if the intended participant recipient who has set the language preference as Chinese and the intended manager recipient who has set English as language preference, with this checkbox option enabled, both will receive emails in their corresponding language preference given that the template has both of these language-specific messages configured.



The highlighted is the new option of language targeting option on the Email Template Editor.

One caveat of enabling this feature, the "CC" column will be disabled and only intended recipients can be selected as "To" recipients. Specifically, if the recipient is already in the "CC" list, checking the option will cause the intended recipient to be tagged as "Omitted" instead. The reasoning behind this is that by definition carbon copy should be an exact copy of the original message and it shouldn't be a language-variant message.



It might also be noted that, for external recipients, it's not possible to match language preference, the mail will be always be sent in the default language.

Add NewAssignmentID Column to Users CSV Format

There seems to be a misunderstanding that the AssignmentID column is used to update the assignment ID to a new ID, this is not correct. If a user has multiple assignment accounts, there is a need to specify which assignment account to update with the personal record defined in the CSV file, hence the AssignmentID column is used for the lookup rather than the update. Since the column is not for updating an existing ID, hence a new NewAssignmentID column is introduced for this purpose much like the NewUserId column.

NewAssignmentID	Assignment ID	The ID of the user's assignment to be changed to	None

When adding a new assignment, if both AssignmentID and NewAssignmentID are specified, this NewAssignmentID value will take precedence; when updating an existing assignment, use this NewAssignmentID to update to a new ID if the specified AssignmentID does exist.

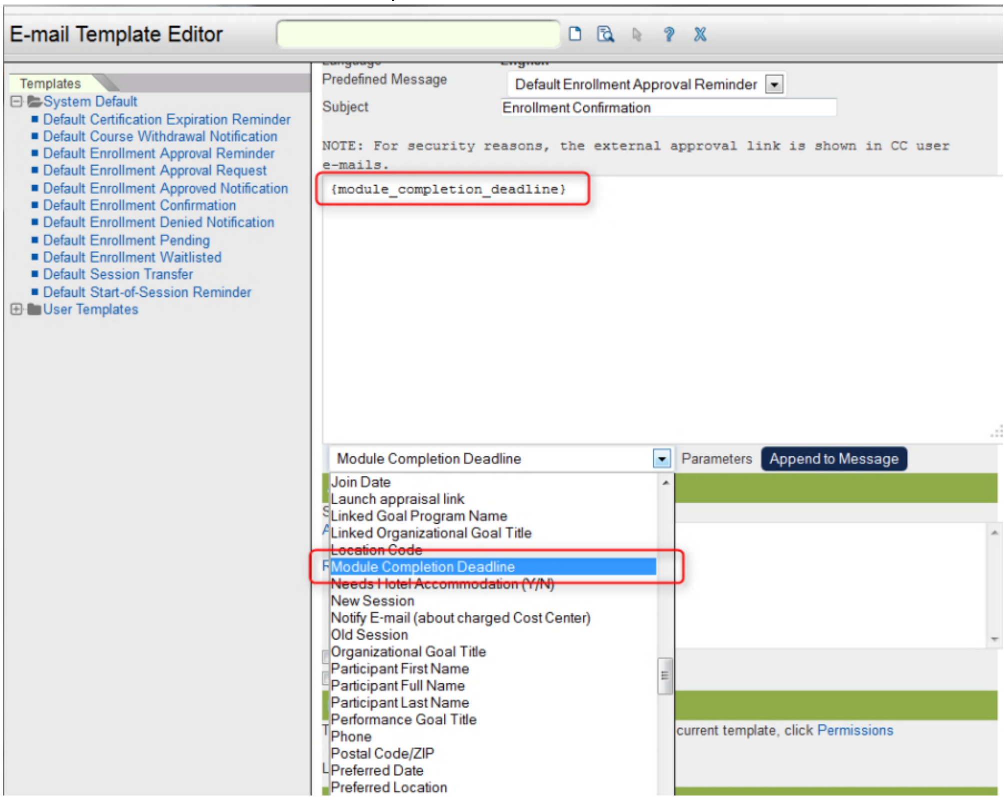
Accordingly, the R109 data dump report has been added with this NewAssignmentID Column.

E-mail Template Parameters

(applies to NetDimensions Talent Suite)

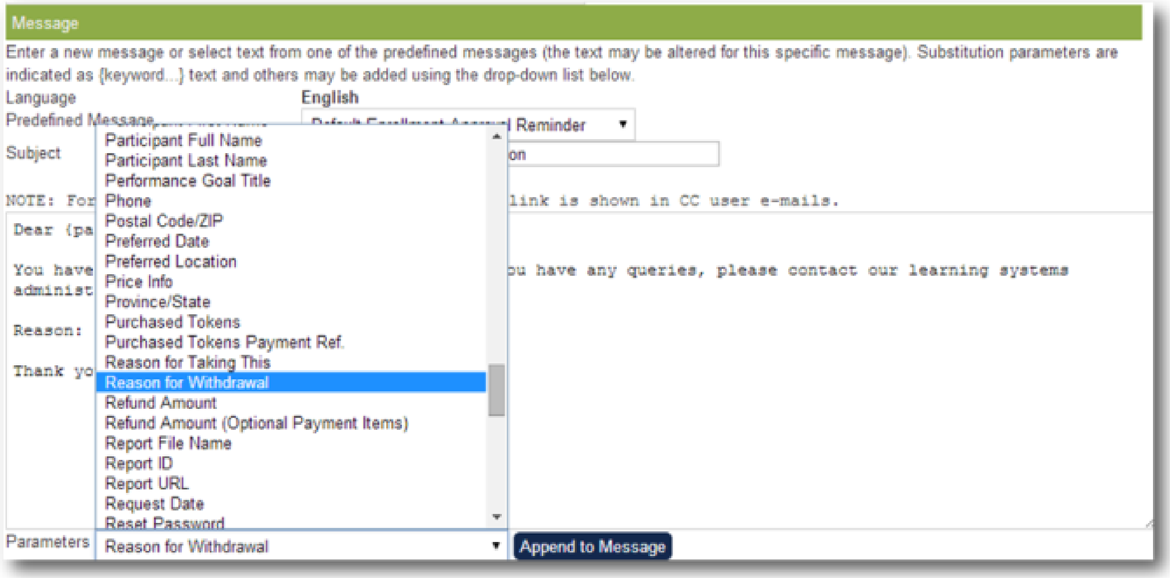
Module Deadline as E-mail Template Parameter

A new e-mail template parameter "Module Completion Deadline" is added. Administrator can put {module_completion_deadline} into the e-mail template.
This deadline is the actual completion deadline of the transcript. If a module is set to expire X days from enrollment, then the value of this parameter will be the actual date of enrollment date + X days.

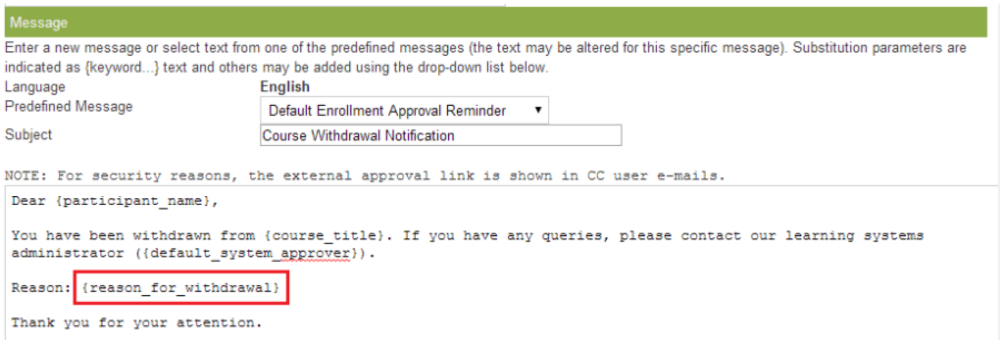


Withdrawal Reason as Email Template Parameter

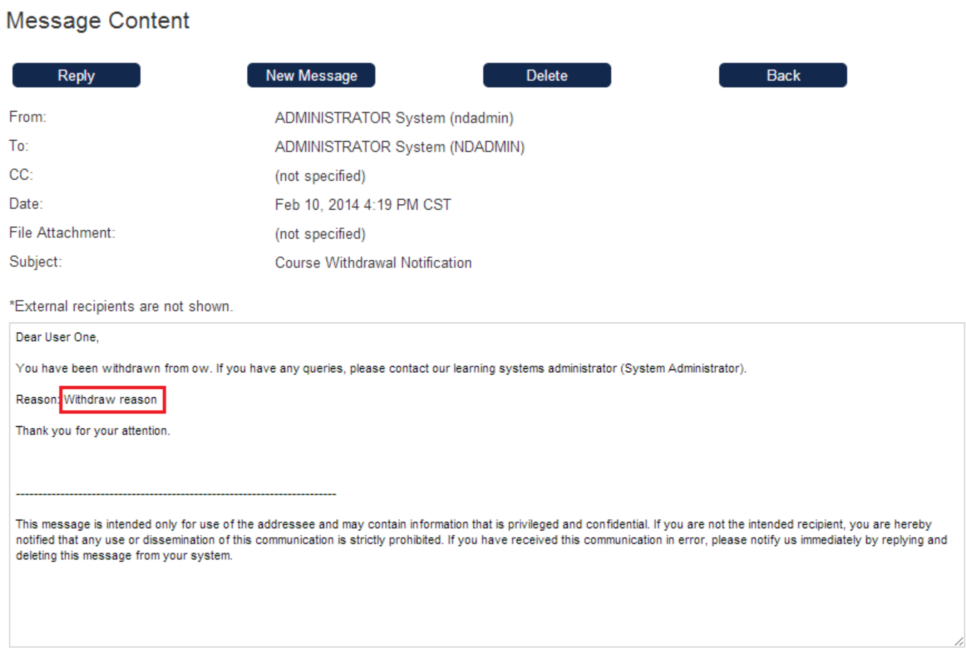
Users can now configure courses to require a reason for withdrawal. The related template parameter "Reason for Withdrawal" is now available in the system.



Reason for Withdrawal parameter on email template editor



Adding the Reason for Withdrawal parameter on an email template



A sample email content having the Reason for Withdrawal

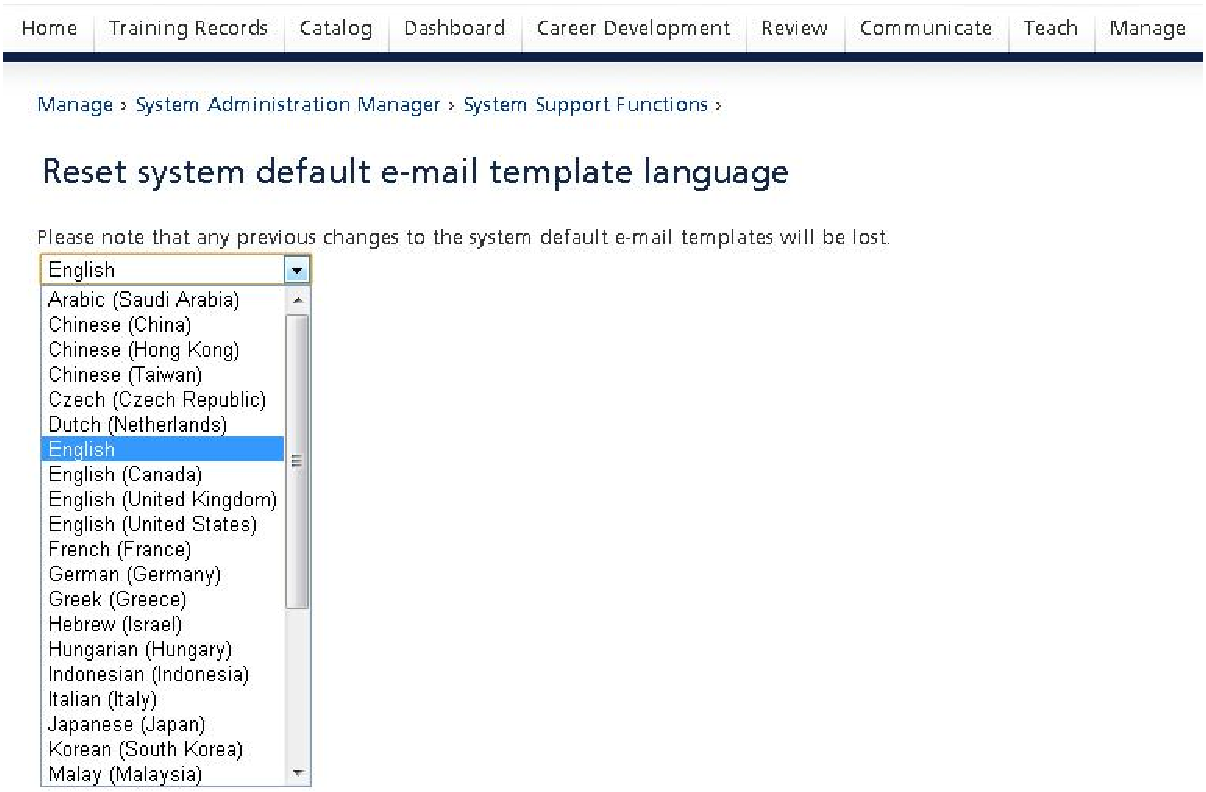
Languages for Email Templates

Changing the Default Language for E-mail Templates

To change (or reset) the default language for e-mail templates:

1.Access **Manage Center > Communicate > Email Manager > Reset system default e-mail template language.**

2.In the *Reset System Default E-mail Template Language* page, select the desired language from the drop down list.



3.Click **Submit**. An acknowledgement appears.

4.Click **Back to System Support**.

Adding Other Languages to an E-mail Template

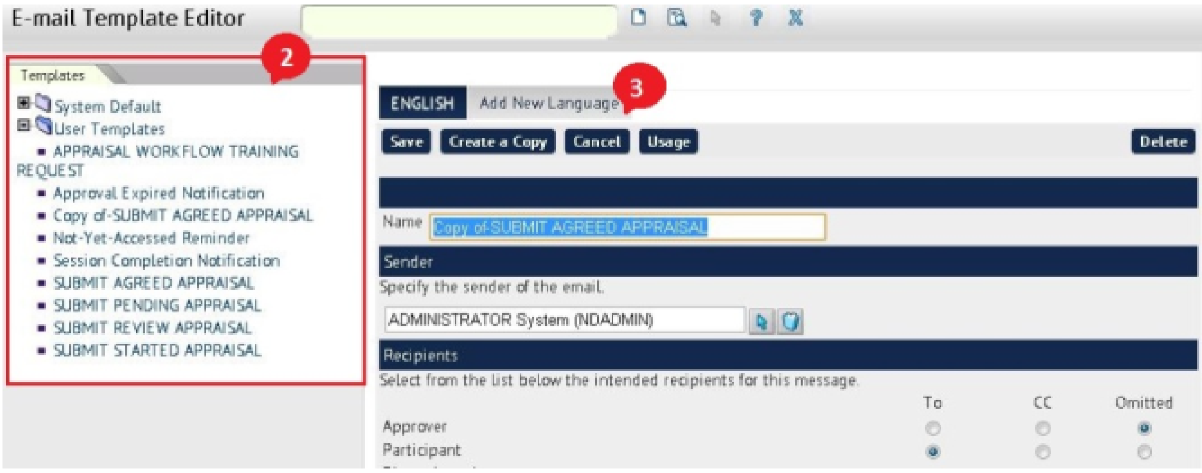
This feature allows the user to add other language to an email template editor. By adding other language to an email template allows the user to send email messages to other language.

To do this:

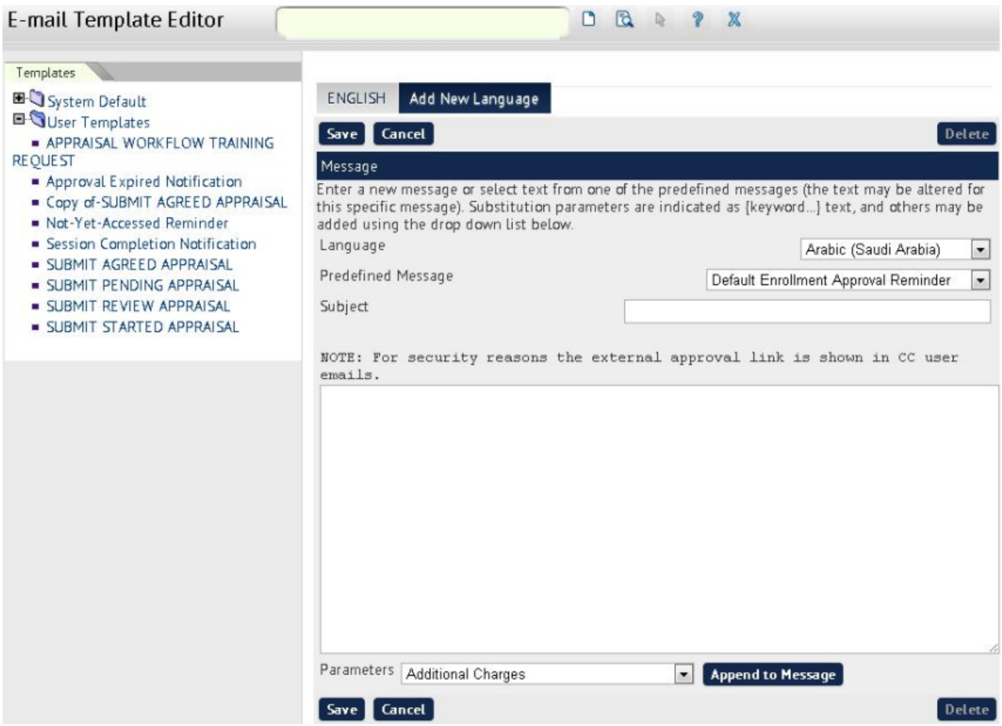
1.Proceed to email template editor by going **Manage Center > Communicate > Email Manager > Email Template Editor**.

2.On the email template editor, select the existing email template where the language will be added.

3.Click the Add New Language.



4. This opens the predefined messages editor. Select the language you want to add.



5.Select the Predefined Message.

6.Enter the Subject

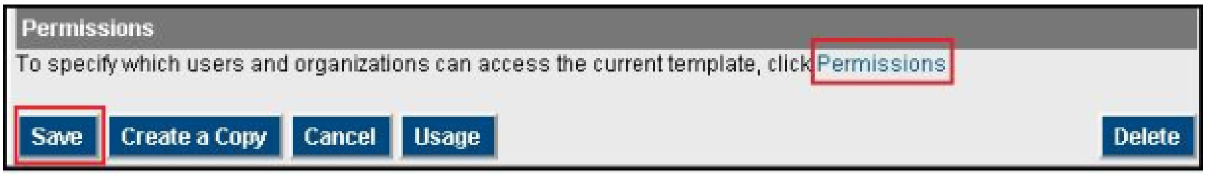
7.Click the **Save** button to keep the changes.

Note: Users can change their language preferences in Settings and if a matching language has been configured for a template, they will receive the e-mail in their preferred language.

Specifying Access Rights

You may also specify read/write access:

1.Click on the **Permissions** hyperlink.



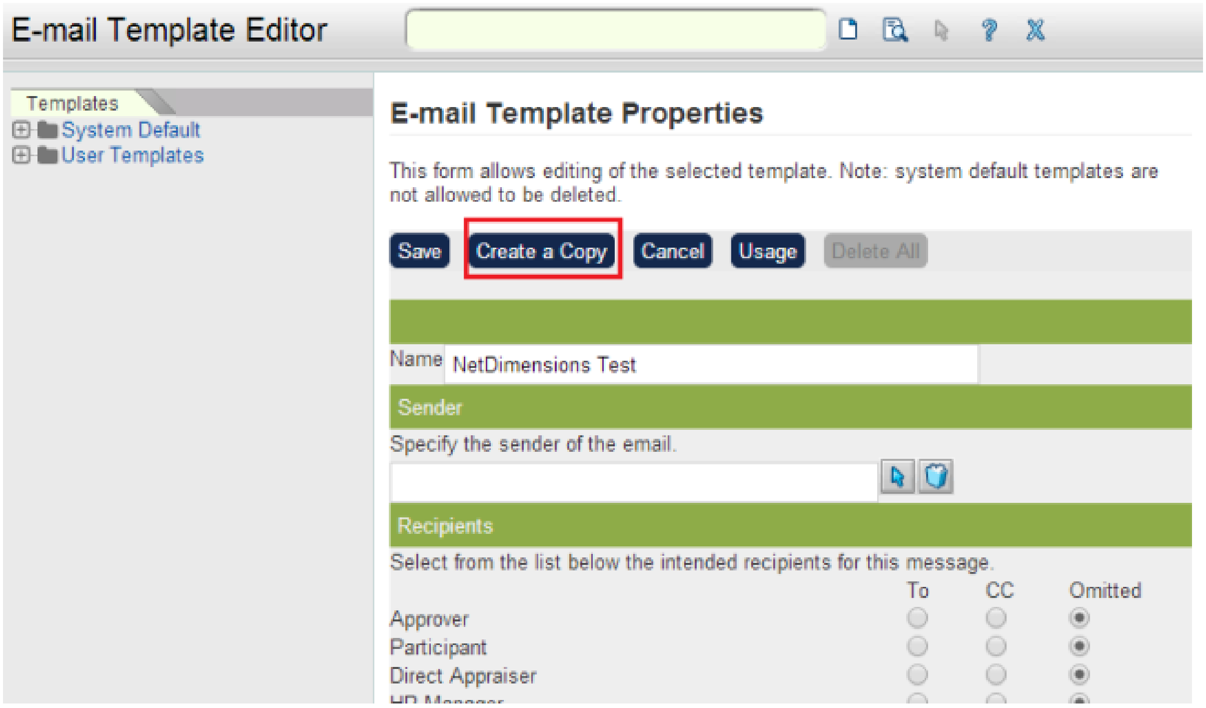
2.Choose the persons with read/write access rights in the Permissions Selector screen that appears.

3.Click **Save**.

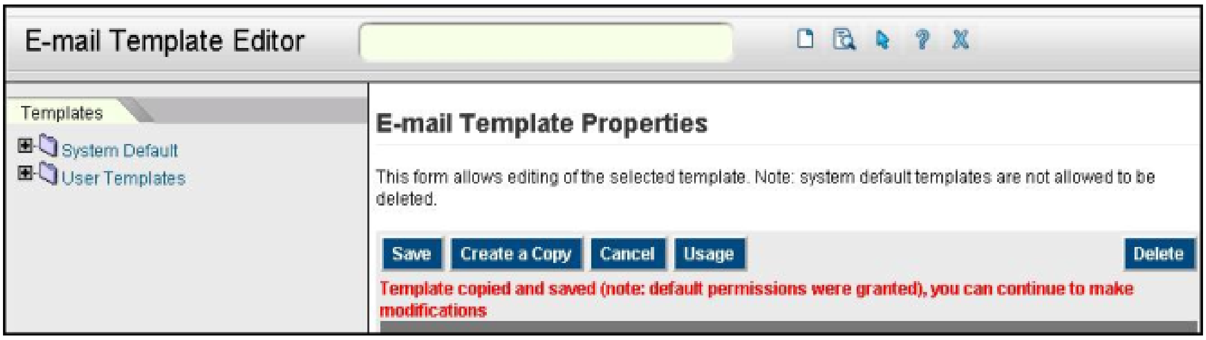
Duplication of E-Mail Templates

To make a copy of the template:

1.From the Email Template Editor, click **Create a Copy**.



2.Talent Suite returns an acknowledgement and a copy appears in the left Templates column.

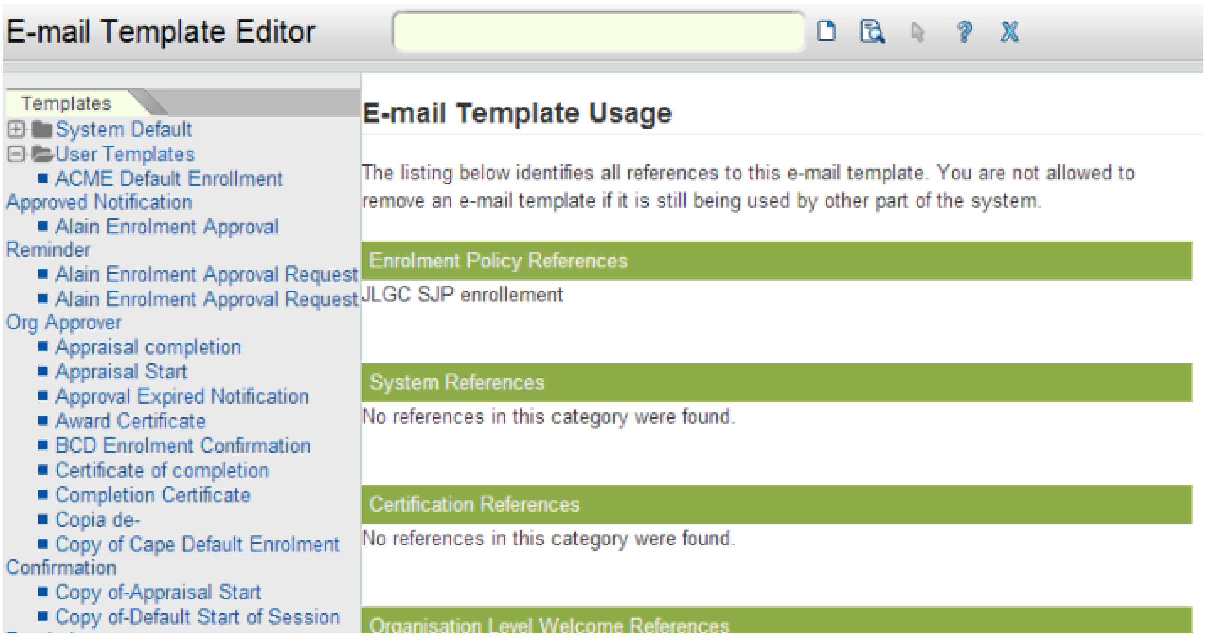


3.Close the *Email Template Editor* screen by clicking the **Close** icon.

Deleting E-mail Templates

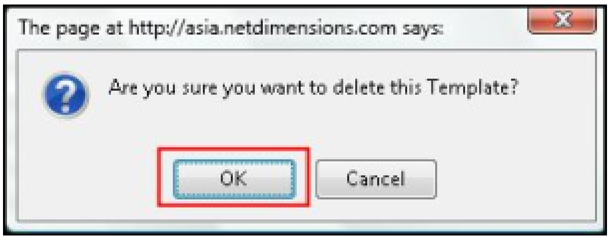
To delete an existing e-mail template:

1. Locate the template to remove.
2. Click on the template. The *Email Template Properties* screen appears.
3. Check whether this template is in use by clicking **Usage**. The *E-mail Template Usage* screen appears.



Note: You may not delete a template if it is being used elsewhere.

4.If you have determined that template is not being used in any enrollment policy or that its deletion will not result in adverse consequences, click **Delete**. A confirmation dialog box appears.



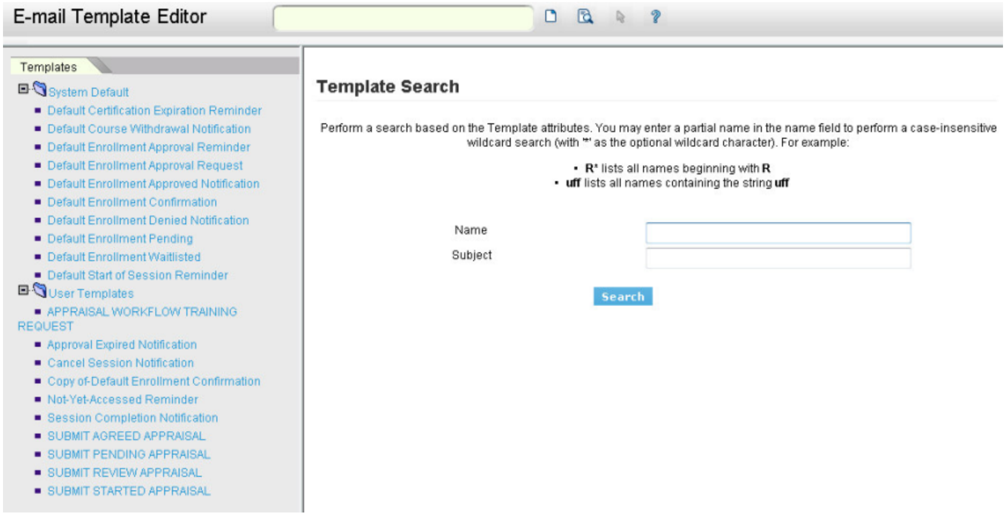
5.Click **OK**. The Talent Suite returns an acknowledgement.

Searching for E-mail Templates

To search for an existing e-mail template:

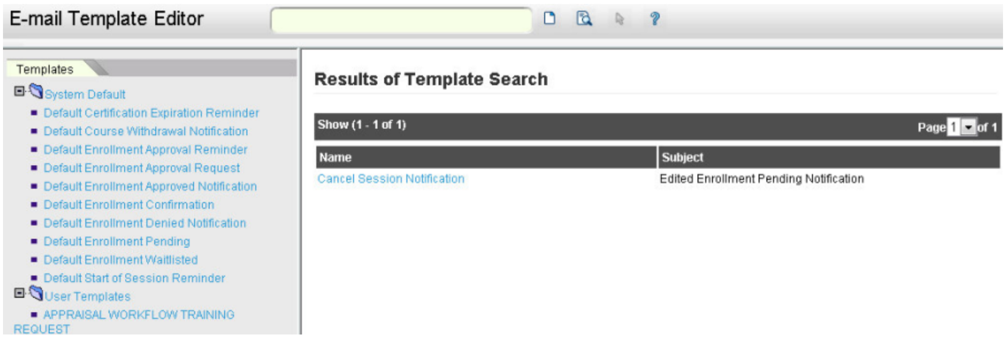
1.Click on the **Search** icon.

2.The *Template Search* screen appears.



3.Enter the item you wish to search for in the Name or Subject fields. You may either type in the full name or part of the name followed by a **''. For example, to search for items starting with the letter R you would enter 'R**'

4.Click **Search**. The results appear in the Results Search screen.



5.The search result displays the list of emails that matches the string you entered in the search box. You can open the e-mail by clicking the name of the template.

Sending Bulk E-mail Messages

Bulk e-mail messaging allows you to send messages to targeted individuals or groups. Bulk e-mails should be contrasted to broadcast messaging in which a message is sent once for each new logon and to any currently logged in users, that is, without specifying recipients. Before sending a bulk (or mass) e-mail, you must first have predefined messages - that is, e-mail templates. While the Talent Suite provides some default templates, you may wish to create new ones.

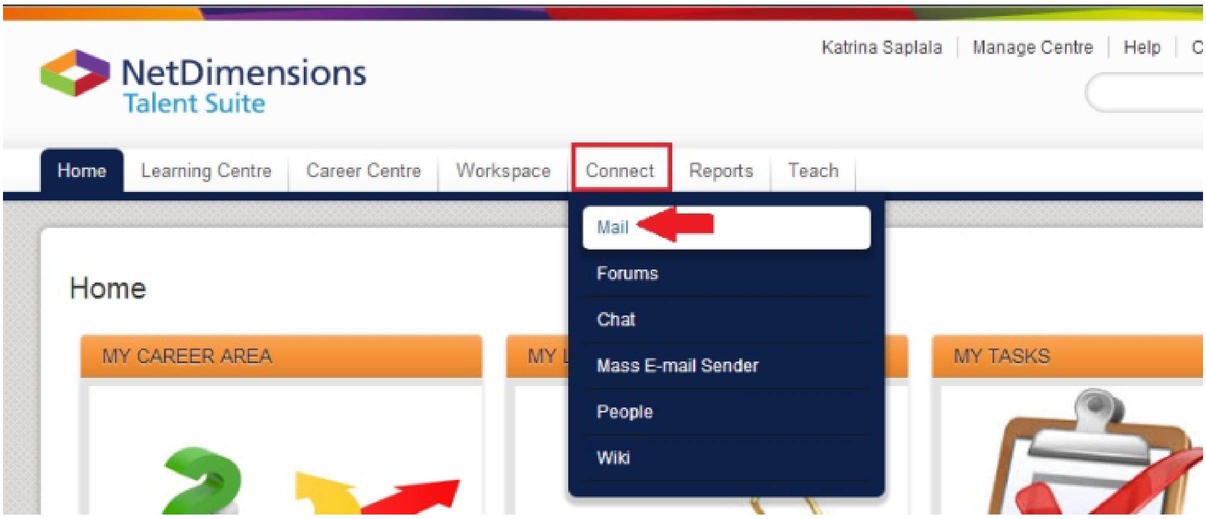
A mass or bulk e-mail message can be sent either from the Catalog Editor or from the Mass e-mail functions in Communicate.
Choosing between the two options:

1. Sending a bulk e-mail through the Catalog Editor allows you to target participants in a specific learning program using your own message.
2. Sending a mass e-mail through the Mass E-mail functions in Communicate allows you to use a pre-defined message (an e-mail template).

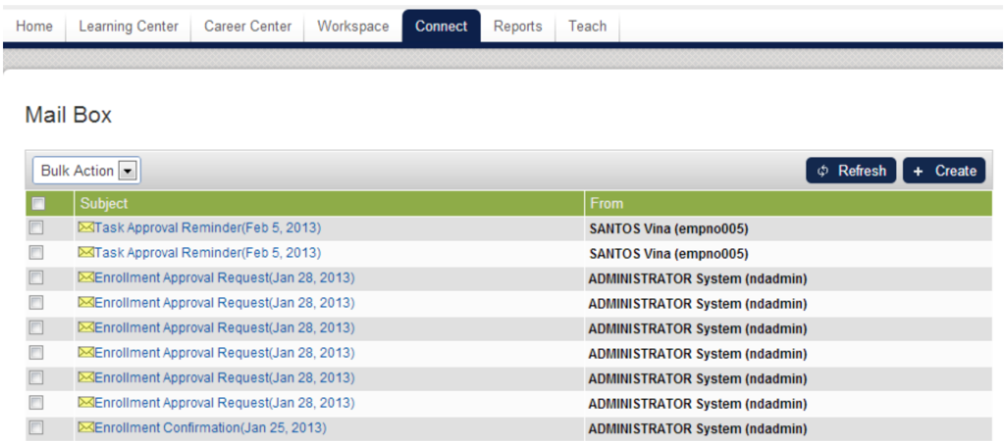
Sending Bulk E-mail from the Communicate Page

To send a bulk (or mass) e-mail from the Communicate Page:

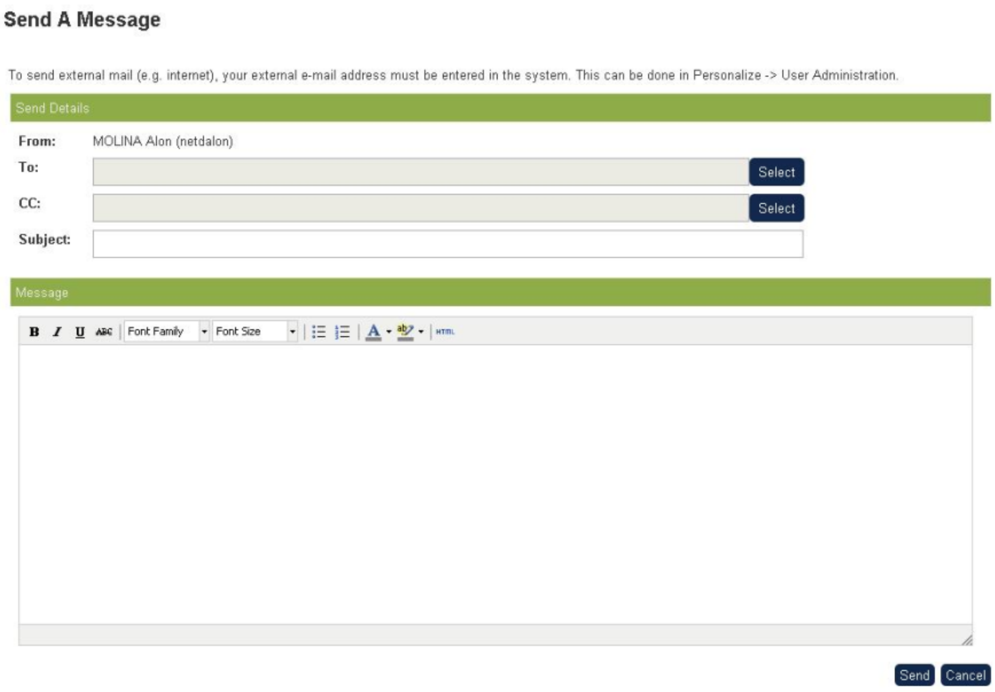
1.On the main menu, hover your mouse to **Connect** then select to **Mail**.



2.Click the **Create**.



3.The *Send a Message* screen appears in a new window.



4.Enter the direct recipient and CC recipient by clicking the **Select** button

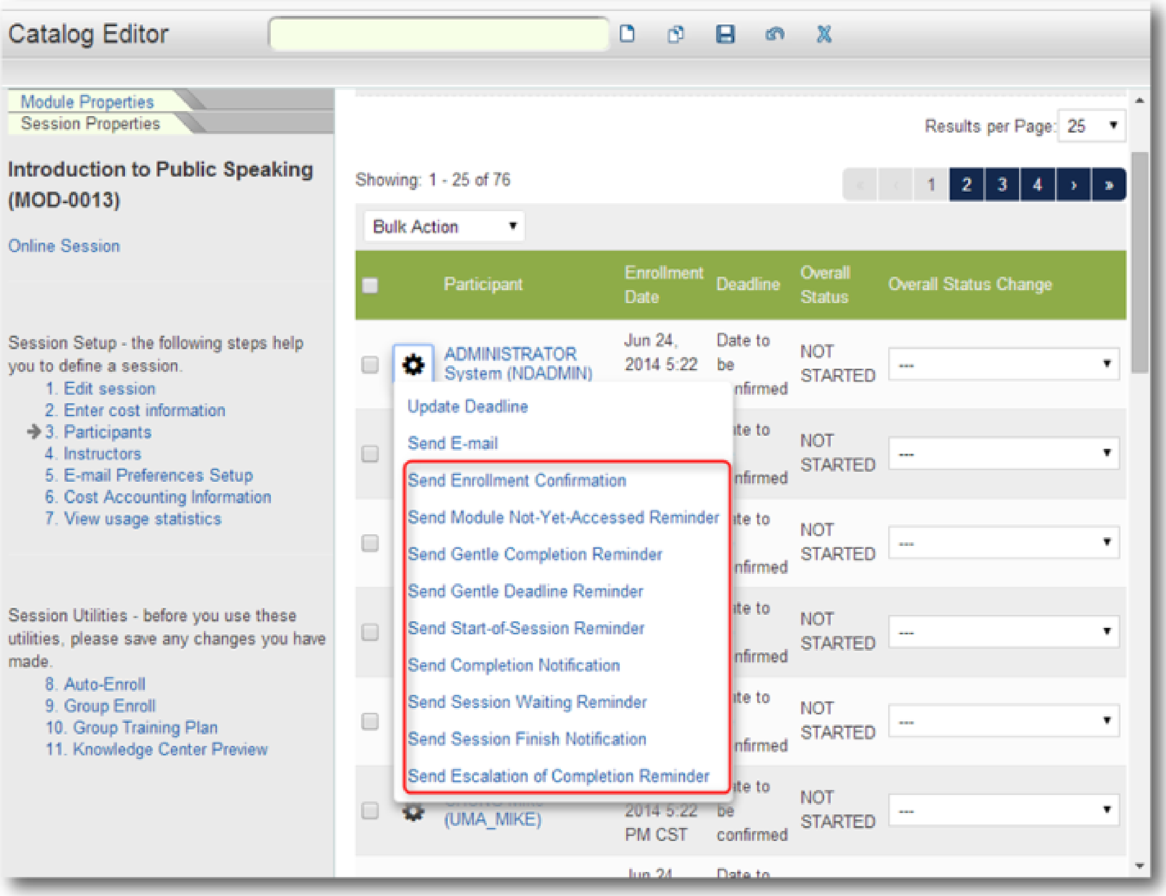
5.Enter your message under the Message section.

6.Click the **Send** button.

Send Automated E-mails for Participants on Demand

A new feature to send automated e-mails to course participants on demand has been added to the Catalog Editor Participants List. From the gear icon, course administrators can choose to send the following e-mails to selected participants on demand.

1. Enrollment Confirmation
2. Module Not-Yet-Accessed Reminder
3. Gentle Completion Reminder
4. Gentle Deadline Reminder
5. Start-of-Session Reminder
6. Completion Notification
7. Session Waiting Reminder
8. Session Finish Notification
9. Escalation of Completion Reminder



Sending automated e-mails on demand from Participants List

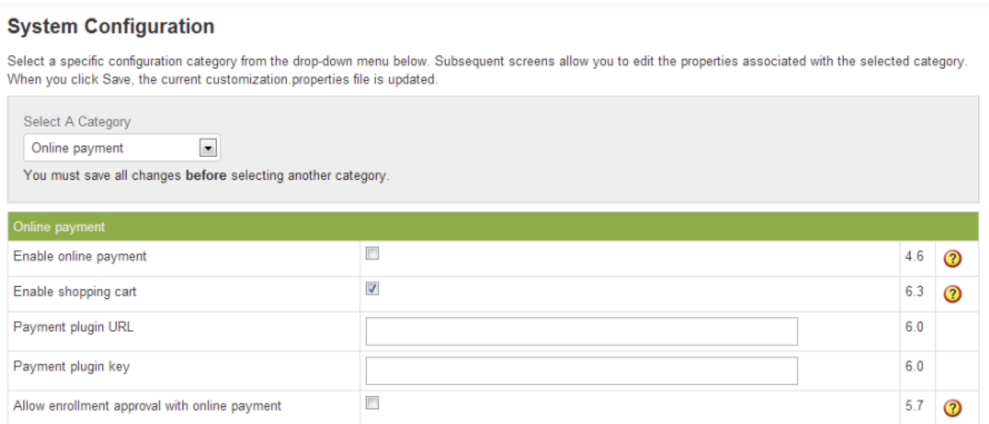
The e-mail will be sent regardless of business rules and will not affected the existing automated e-mails.

Welcome Email

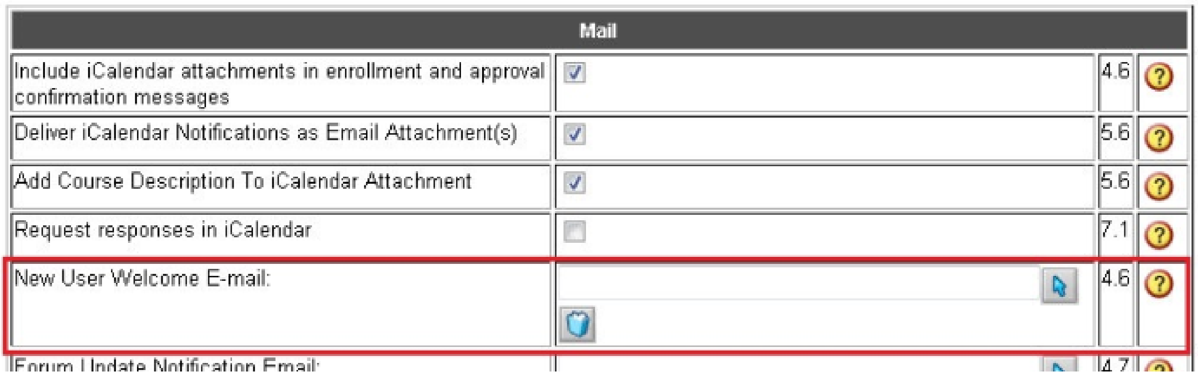
Configuring the New User Welcome Message

To configure the Talent Suite to automatically send a welcome message to a new user:

1.Access **Manage Center > System > General Settings > System Configuration**. The *System Configuration* screen appears.



2.Click the drop-down menu in Select a category and choose Mail. The Mail category appears.



3.Click on the **Select** icon by the New User Welcome E-mail.

4.Select the desired E-mail Template from the E-mail Template Editor screen that opens in a new window.

Enhanced Welcome Email Handling

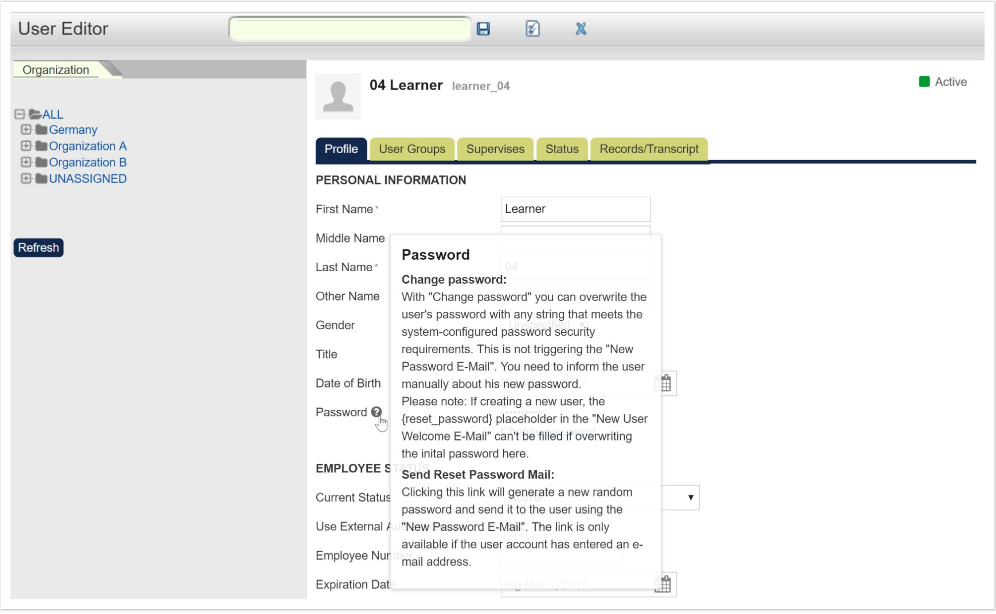
Previously, the Welcome Email was based on users added in the last 24 hours - this made it problematic to send a welcome email to users who were loaded in advance of being ready to use the system, or who had missing email information in the initial load. In some cases these users may have been added without an email address (not yet available) or in a not active state.
Now, the Welcome Email Event Handler will check users added within the last 30 days and at the point at which they have a valid email address (e.g. contains the "@" character) and a active status (e.g. not closed, deleted, pending, suspended, or inactive), the email is sent and the date recorded in the user statistics. This information shows in the User Editor in the Status tab for each user.

Password in New User Welcome E-Mail for manually created users

When creating a user manually with the User Editor, the Administrator doesn't have to care about the password. The system automatically creates an initial, random password. And this password fills the *{reset_password}* placeholder in the New User Welcome E-Mail. Note that the *{reset_password}* placeholder in the New User Welcome E-Mail can only be filled as long as it is the initial password. Once an admin overwrites or resets the password, the placeholder stays empty.

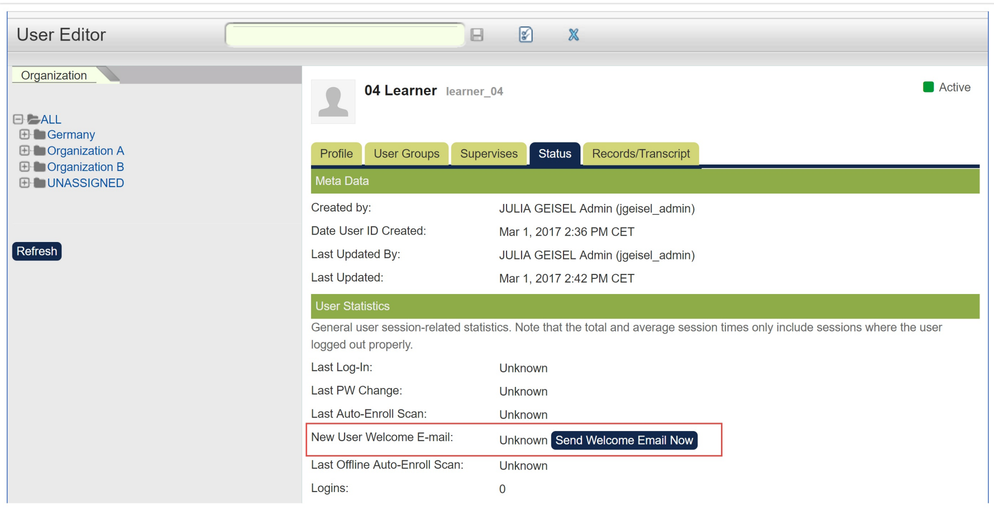
Help Text for Password

A tool tip appears when users click on the Help icon explaining the functionalities of the new "*Change Password"* feature

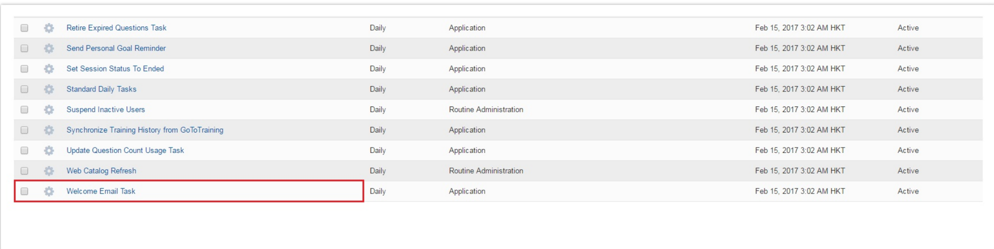


Immediately send out the New User Welcome E-Mail

The New User Welcome E-Mail is normally sent out as part of the next Daily Tasks. If users need their login credentials immediately, the Administrators can manually send our the welcome email. This can be done by clicking the "*Send Welcome Email Now*" button on the Status tab of the user in the User Editor.



Or manually run the Welcome Email Task.



Sending mail to the internal mail box

In Talent Suite, all mail notifications will send to the internal mailbox. Mail will also send to external mail box if the following conditions are met:

1. SMTP server is configured
2. User email address is specified

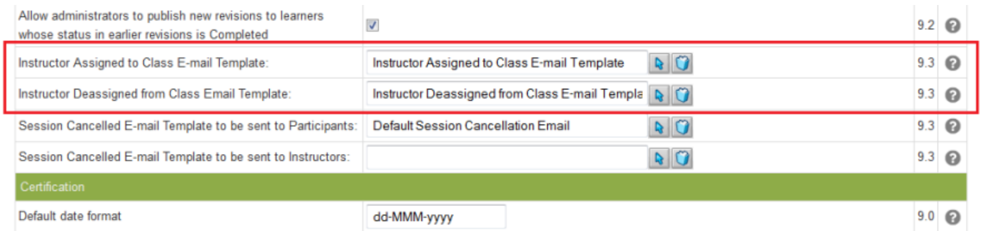
"Use External Mail" field is removed in User Editor, User Preferences, User Data Loader and Report Wizard.
"Allow mail choice" field in System Configuration page is removed.
System property "system.forceexternalmail" and "system.externalmail" are removed.

Reminder and Confirmation Emails

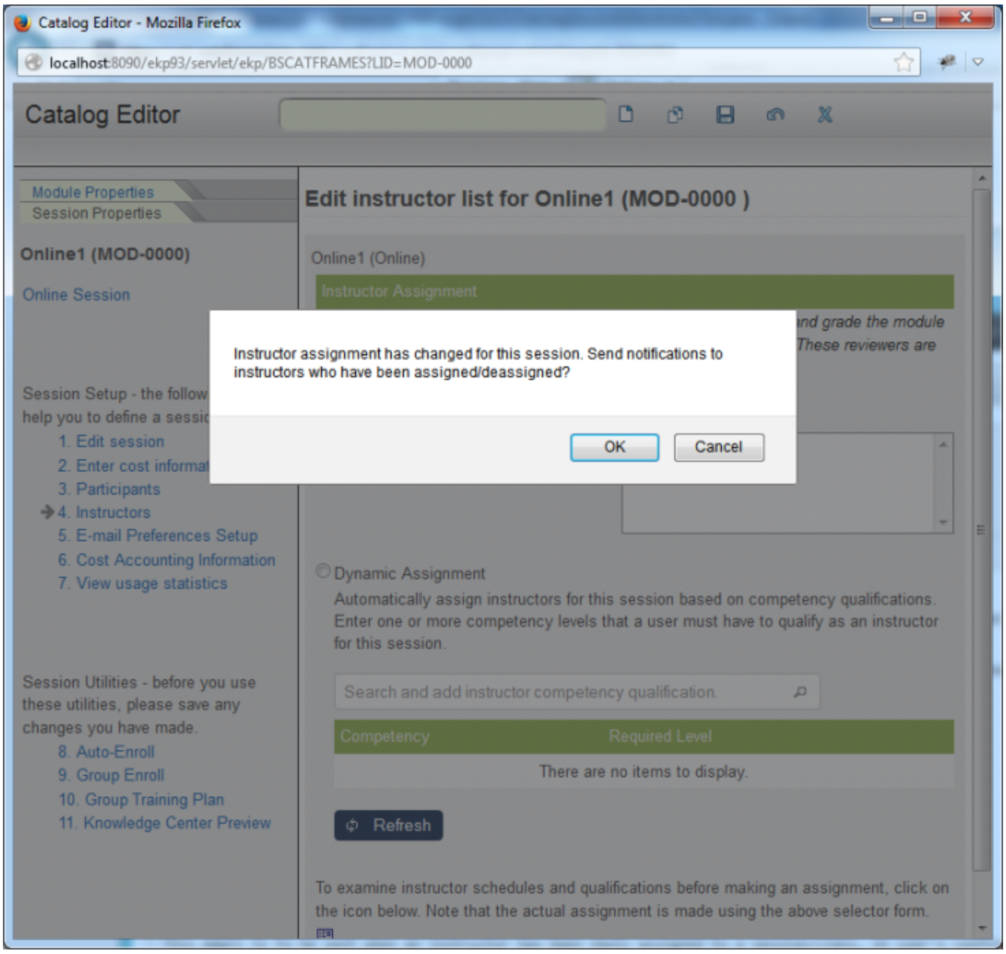
Instructors Notified when Assigned to Classes

An instructor can be informed by email when being assigned to / deassigned as the teacher of a class. This can be done via the two System Configuration settings as shown below:

1. Instructor Assigned to Class E-mail Template
2. Instructor Deassigned from Class Email Template



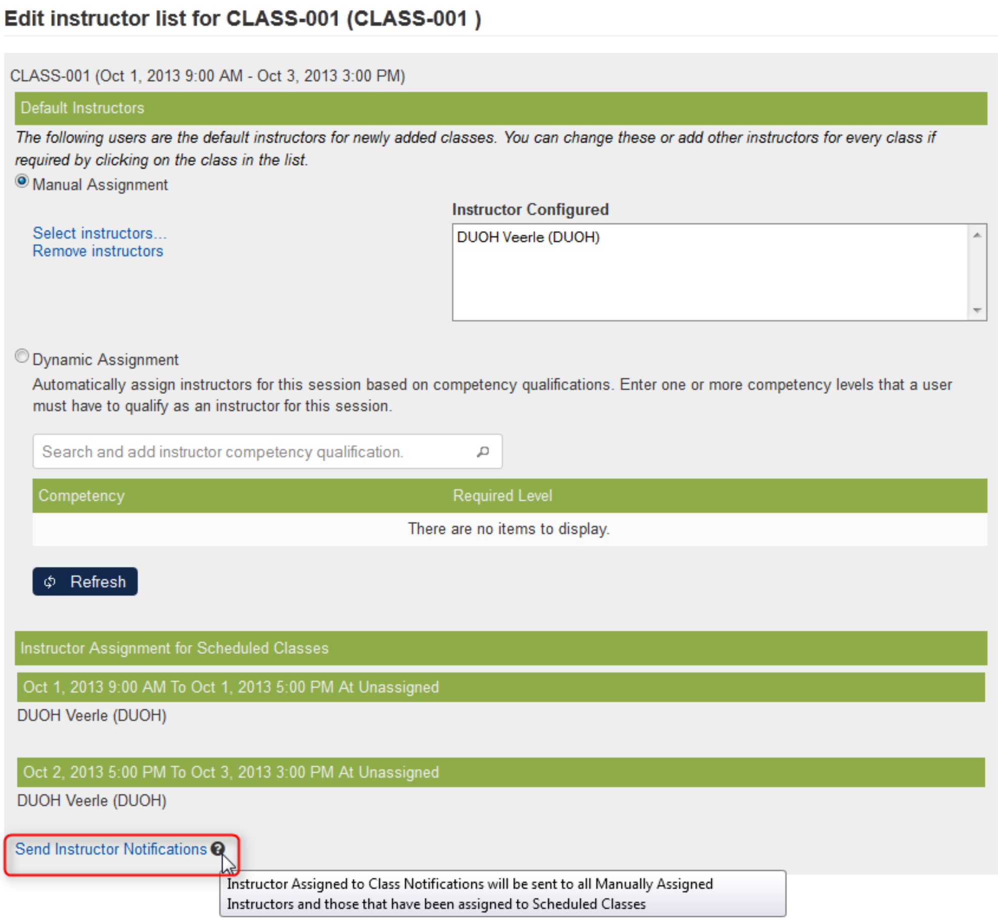
A prompt will appear for the users to confirm that an email will be sent when an instructor has been newly assigned to a session/class.



The function applies only to Instructors who have been assigned manually (excludes dynamically assigned instructors). The email will include iCal invitations, if configured. Users can choose to append Instructor information to the "Course Schedule" email template parameter.

Ad-hoc Send Instructor Notifications

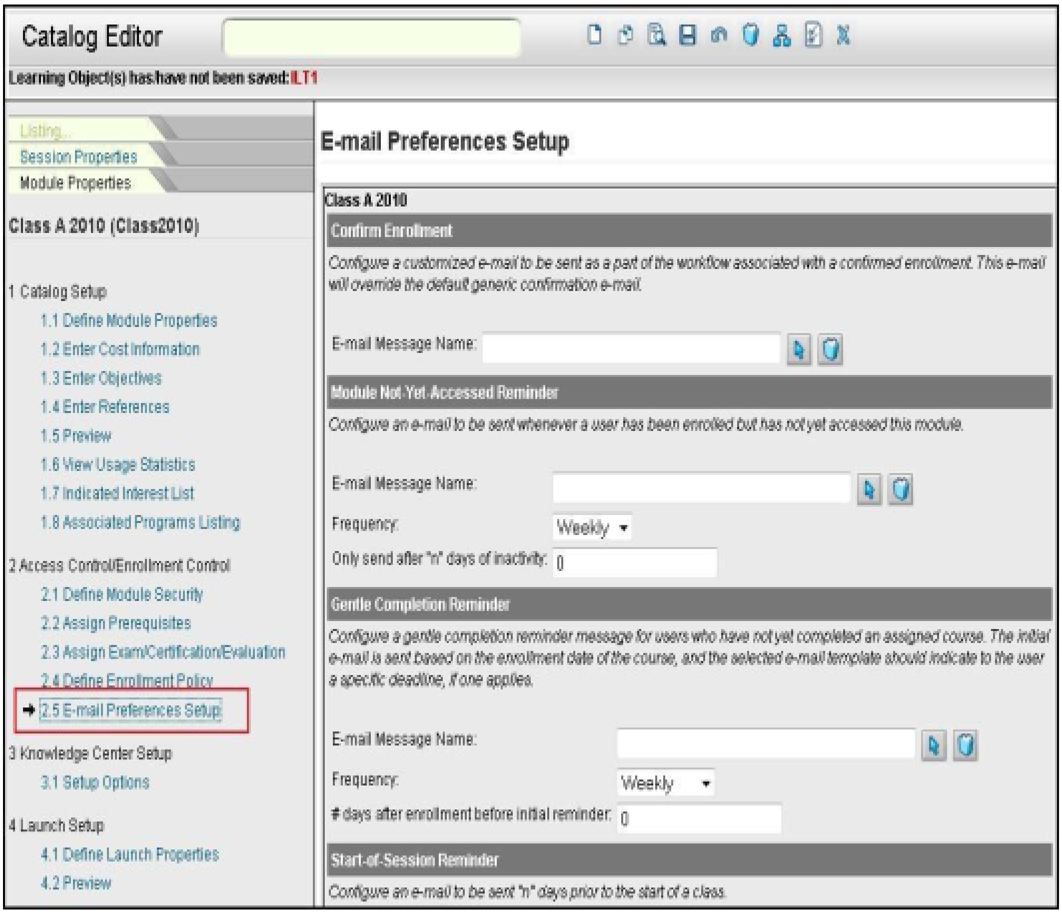
Catalog Administrators can send ad-hoc notifications to instructors (e.g., materials updated) any time.



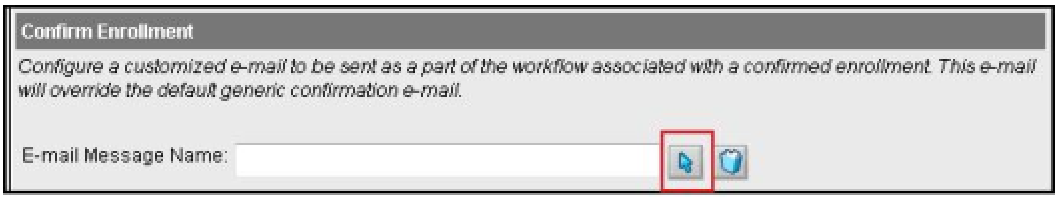
Catalog administrators can send ad-hoc notifications to instructors

Enrollment Confirmation Message

To define which messages are to be sent upon the triggering of certain events: (e.g. enrollment confirmation), select the session schedule (if necessary) then click **E-mail Preferences Setup** in the Catalog Editor. The *Email Preference Setup* screen appears.

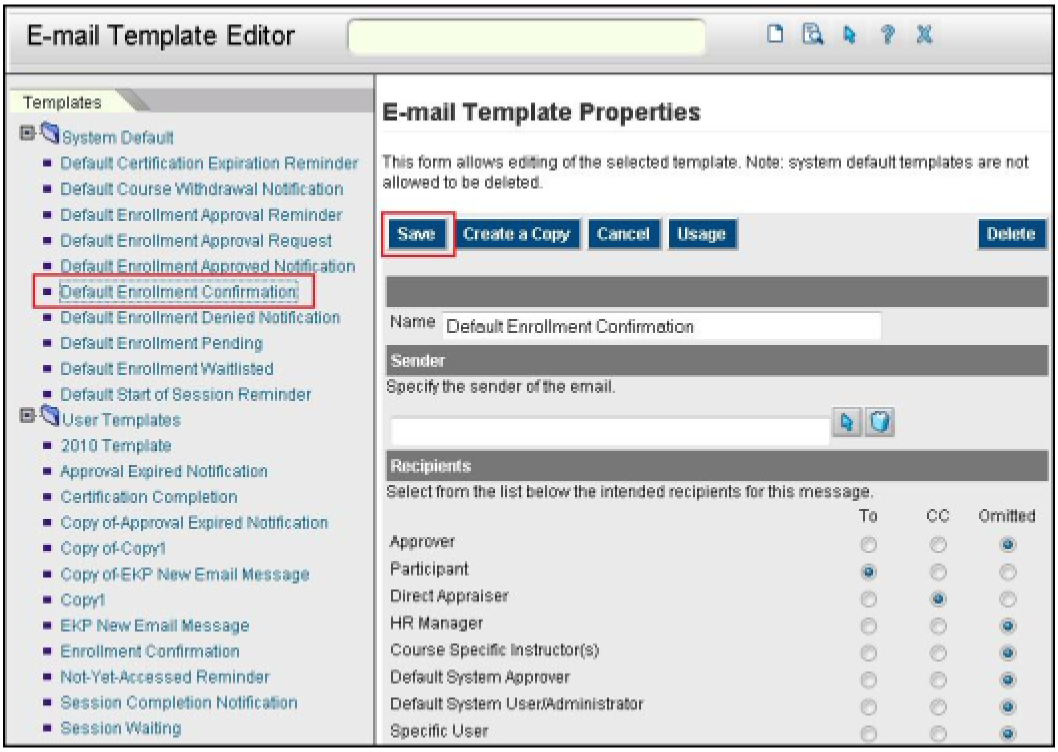


1. To specify an associated enrollment confirmation message, click the Select icon by the Email Message Name field under Confirm Enrollment.



2. The E-mail Template Editor screen appears.

3. Click on the Default Enrollment Confirmation hyperlink. The E-mail Template Properties screen appears.



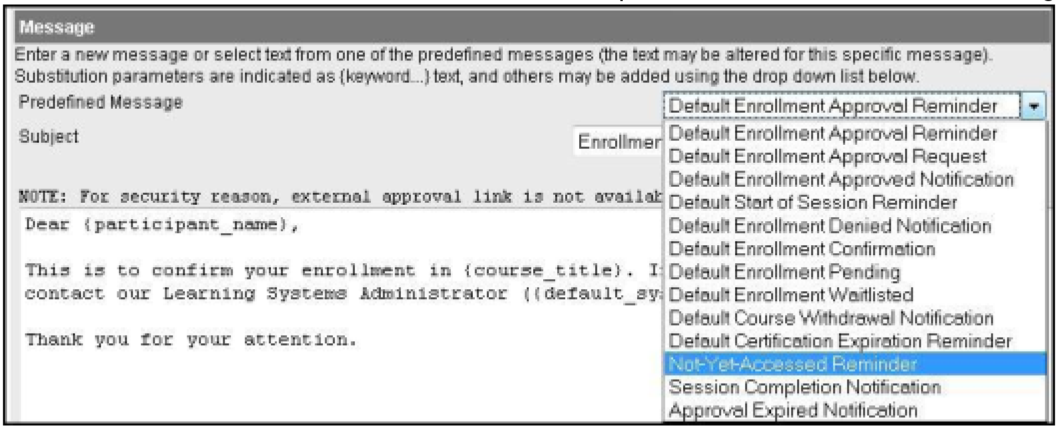
4. Define the properties.

5. Click **Save**.

Not-Yet-Accessed Reminder Message

To specify a reminder message: (telling the participant that he/she has not yet accessed the module)

1. Select **Not-Yet-Accessed Reminder** from the drop-down list in the Predefined Message field.



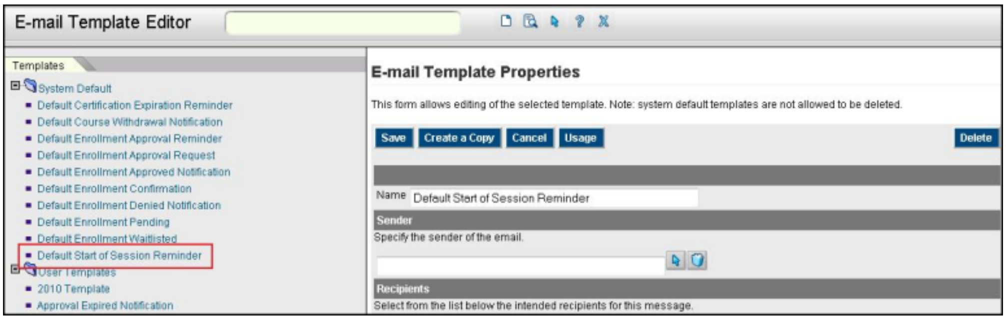
2. Click **Save**.

3. The screen refreshes with the message.
4. Change the title in the Subject field.
5. Click **Save**.

Start of Session Reminder Message

To specify a start of session reminder message:

1. Click on the Default Start of Session hyperlink in the Catalog Editor. The E-mail Template Properties screen appears.
2. Define the properties.
3. Click Save.

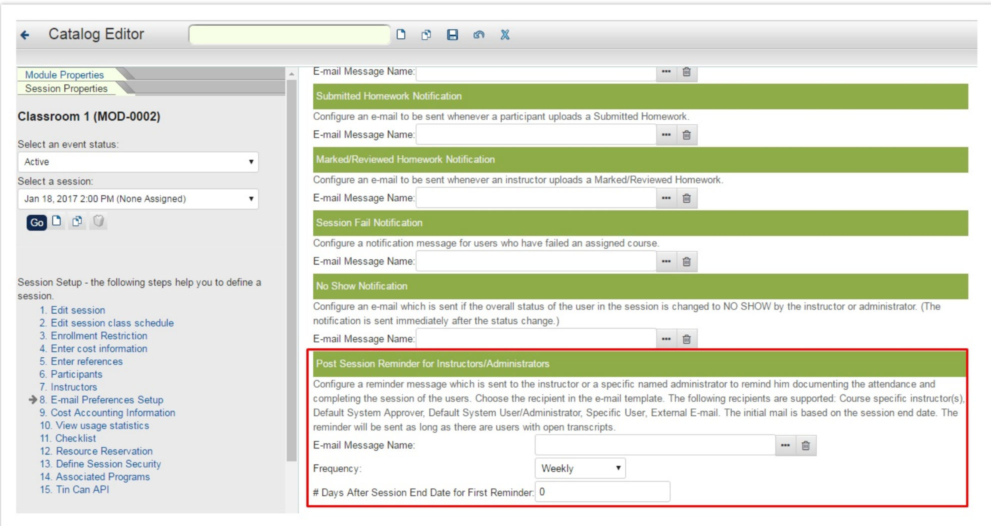


Post Session Reminder for Instructors

This feature allows email to be sent to Instructors and Administrators reminding them to document users' attendance and session completion. This can be configured in the E-mail Preferences Setup of the Catalog Editor

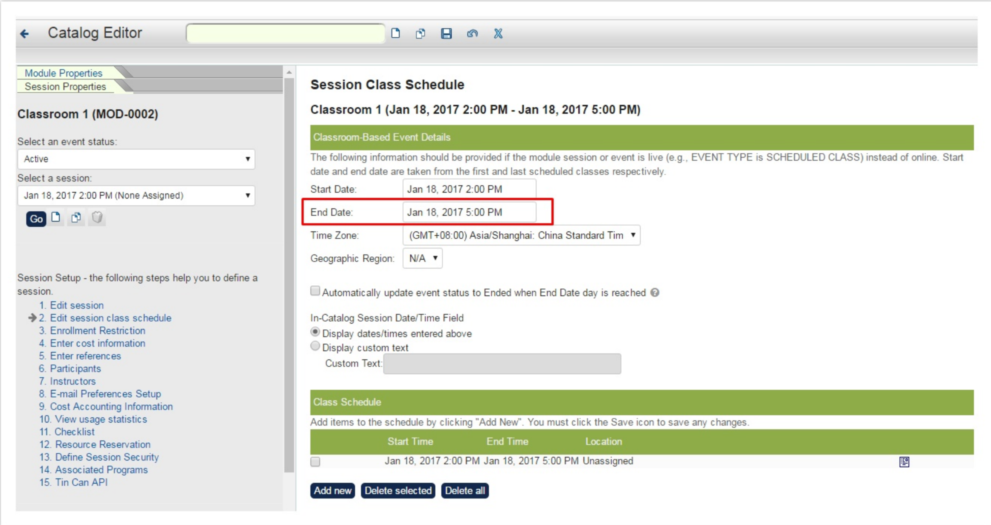
1. **E-mail Preferences Setup**

Users click the ***"..."*** button to select the E-mail template. Note that only *Course Specific Instructor(s), D efault System Approver, Default System User/Administrator, Specific User* and *External E-mail* are supported recipients. Other recipients will not receive any e-mail even if they are selected.

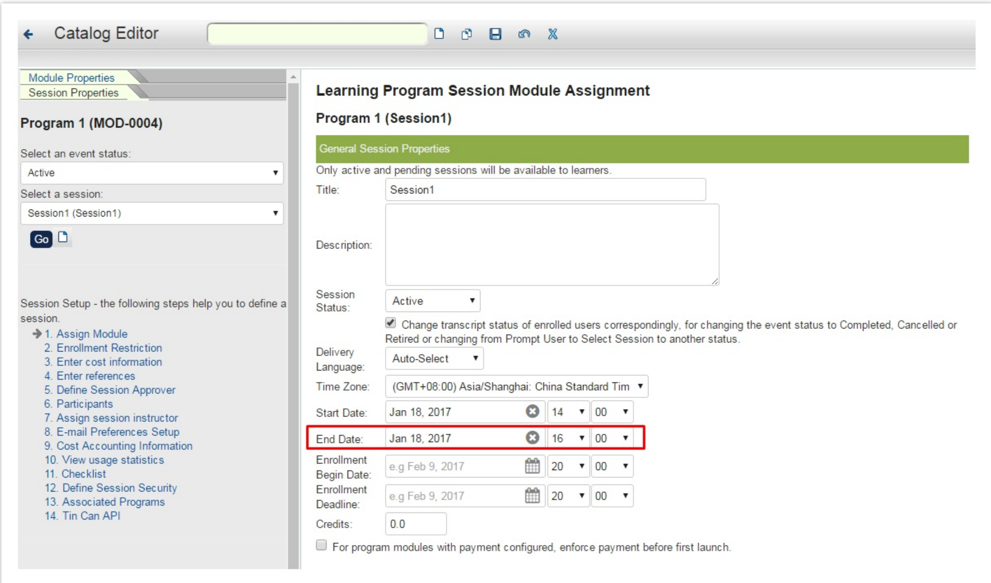


Session End Date

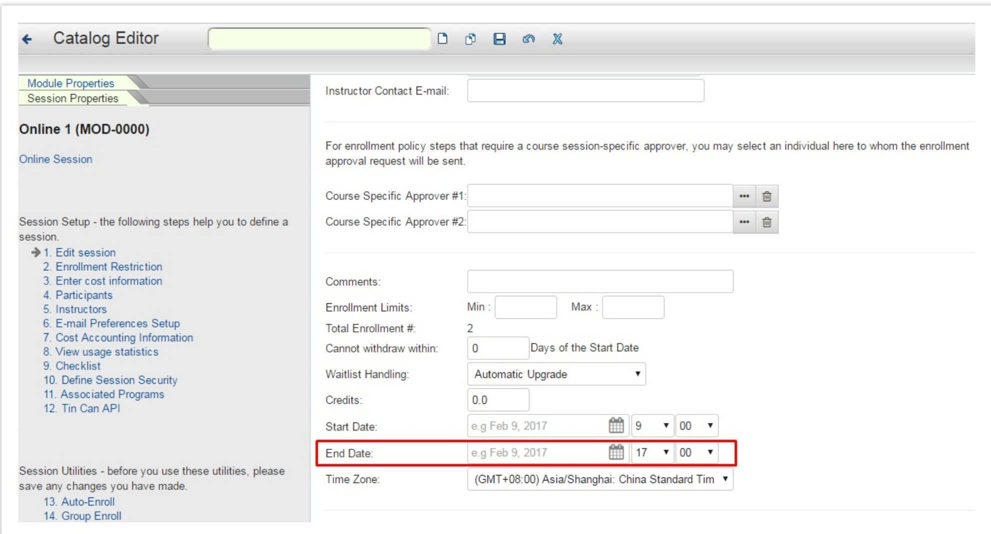
The Post Session Reminder is based on the session end date. For Classrooms / Virtual Classrooms / Workshops / Seminars, the session end date is below:



For Programs, the session end date is below:



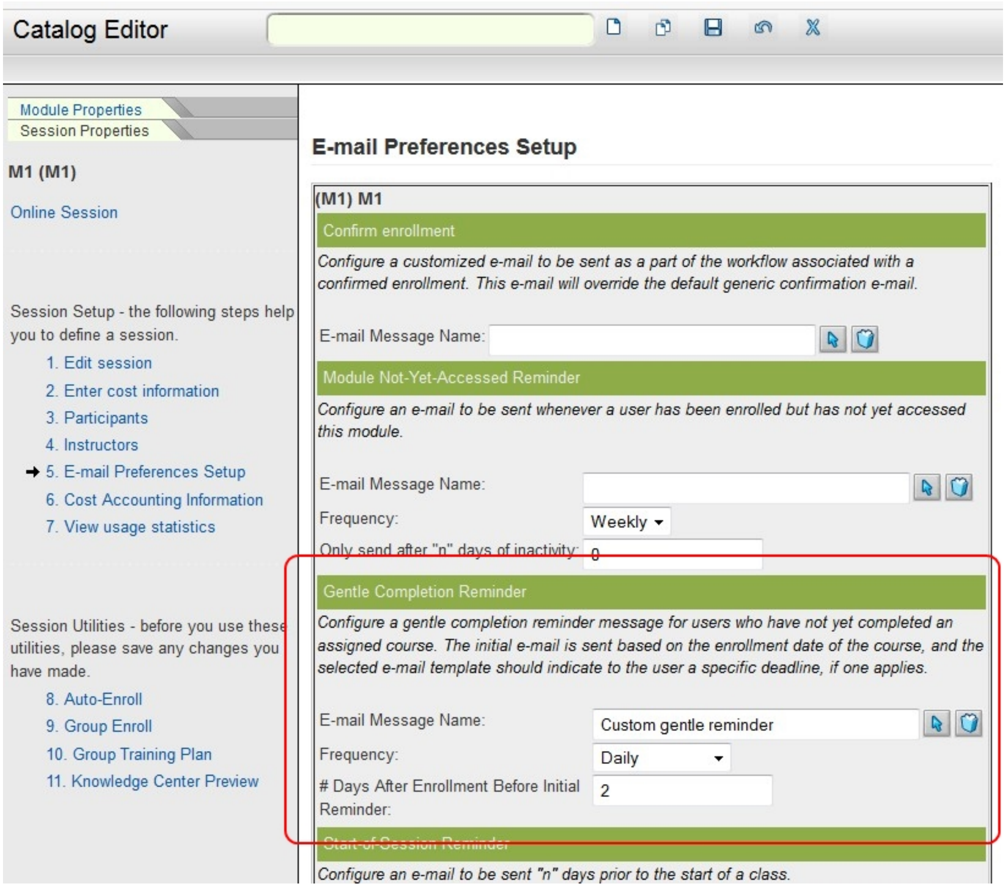
For Online Modules, the session end date is only available if system setting **"In catalog editor, show start date and end date fields for online modules"** is enabled.



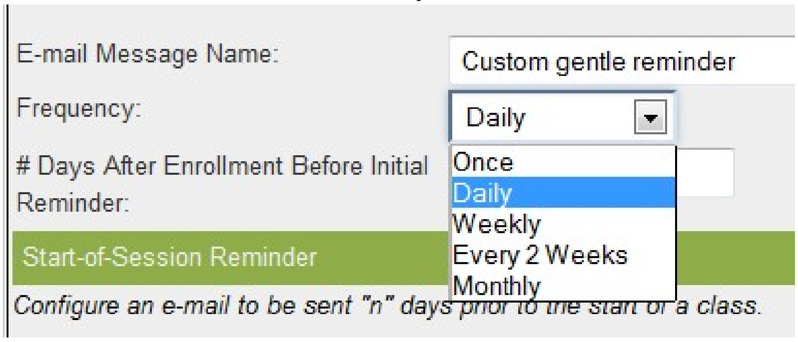
The e-mail will be sent as long as there are users with open transcripts in the session.

Gentle Completion Reminder

Configure a gentle completion reminder message for users who have not yet completed an assigned course. The initial e-mail is sent based on the enrollment date of the course, and the selected e-mail template should indicate to the user a specific deadline, if one applies.



The options for reminder frequency are: Once, Daily, Weekly, Every 2 weeks and Monthly. Also, reminder tasks can be executed daily.



This setup also applies to the **Escalation of Completion Reminder**.

Classroom Enrollment

(applies to NetDimensions Performance NetDimensions Learning)

Currently, for a Classroom course, a user can no longer enroll onto a session once the session's start time has passed. This enhancement allows the session's enrollment deadline to override this restriction in order to extend the enrollment period. In the past, the enrollment deadline would have been used to implement an enrollment cut-off point perhaps days prior to the start of a course session. Now the deadline can also be used to delay enrollment cut-off.

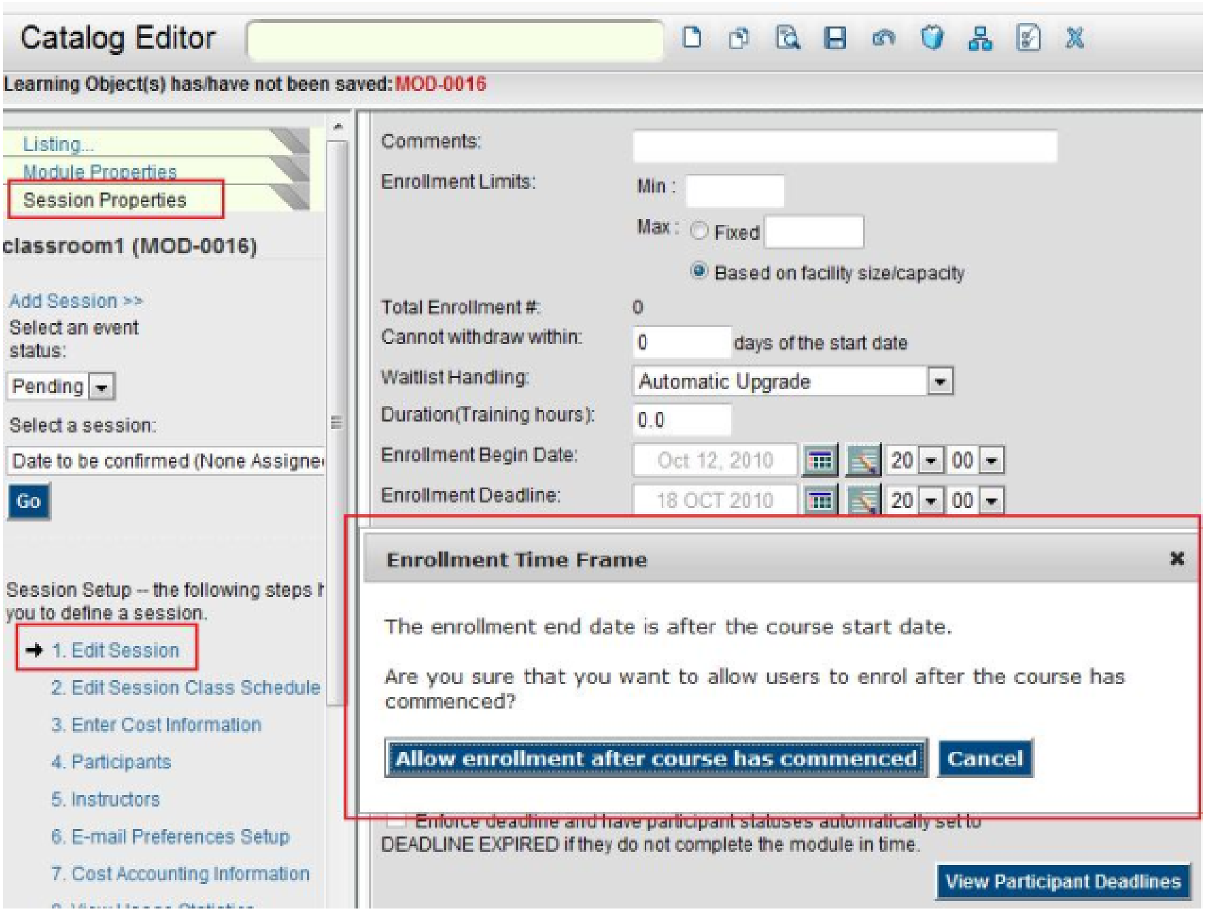
For a new Classroom session, unless it is specified explicitly, the default enrollment deadline is set to be the same as the session start time. The logic also applies to sessions created through the session cloning function and those created via the Course CSV Loader.

Consider a Classroom session with the following settings:

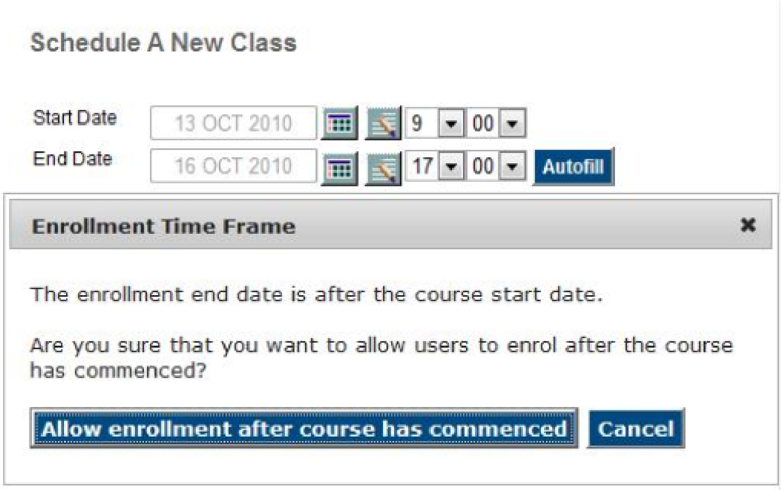
Session Enrollment Begin Date	15 Oct., 2010
Session Enrollment Deadline	15 Nov. 2010
Session Class Start Date	01 Nov. 2010
Session Class End Date	30 Nov. 2010

Suppose on 4th Nov 2010, a learner attempts to enroll onto the session, the learner will be allowed to enroll because the enrollment deadline now takes precedence over session start date. Enrollment can occur up to 15th Nov.

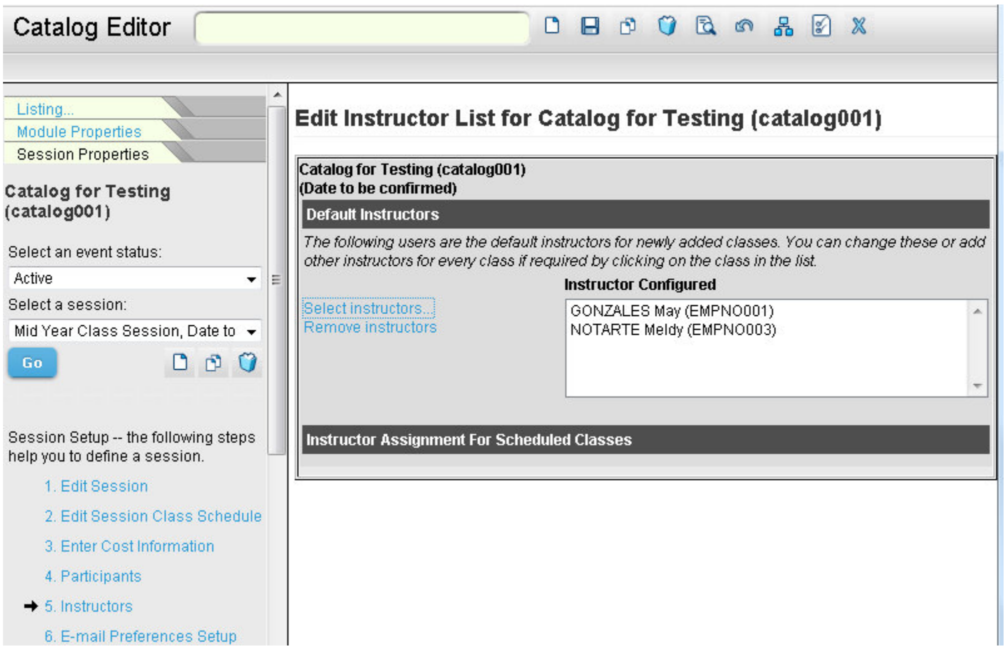
If the administrator tries to set the enrollment end date to be after the Classroom session's start date, a confirmation dialog will be shown under Session Properties.

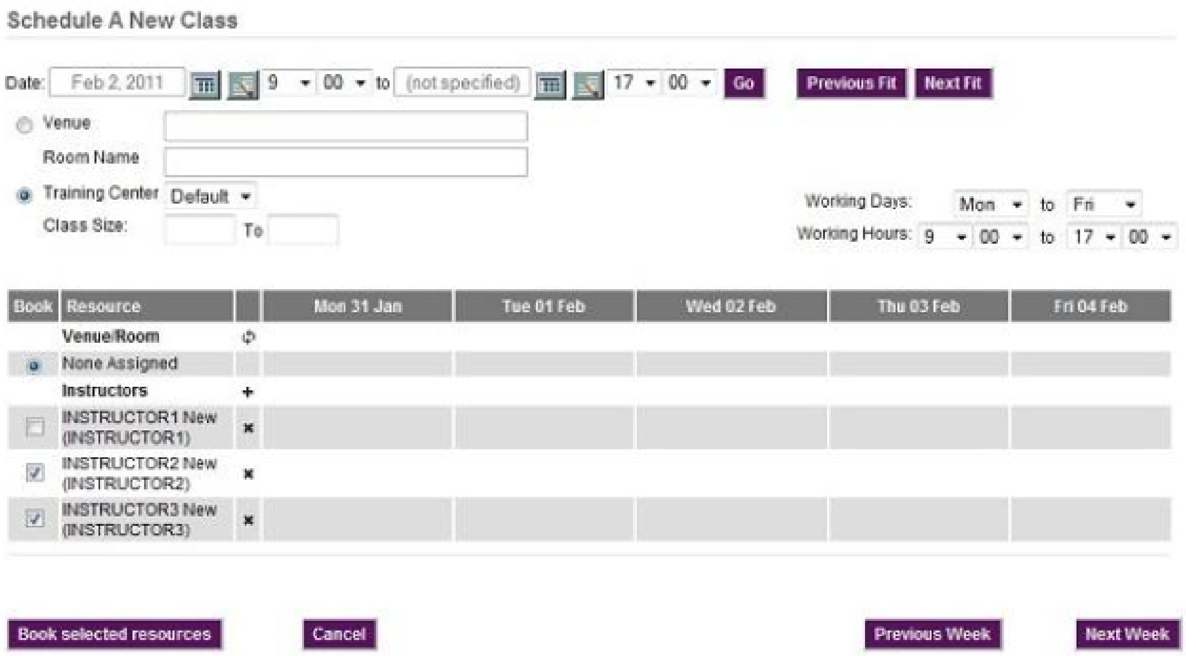


Similarly, if an individual class start date is set to be before the session enrollment deadline, the administrator will receive a warning.



In both cases, the user can click on "**Allow enrollment after course has commenced**" to proceed or "**Cancel**" to pick another date and time.





Default instructor list when scheduling a new session class

Data Migration

All instructors set at the session level will be copied into each class.

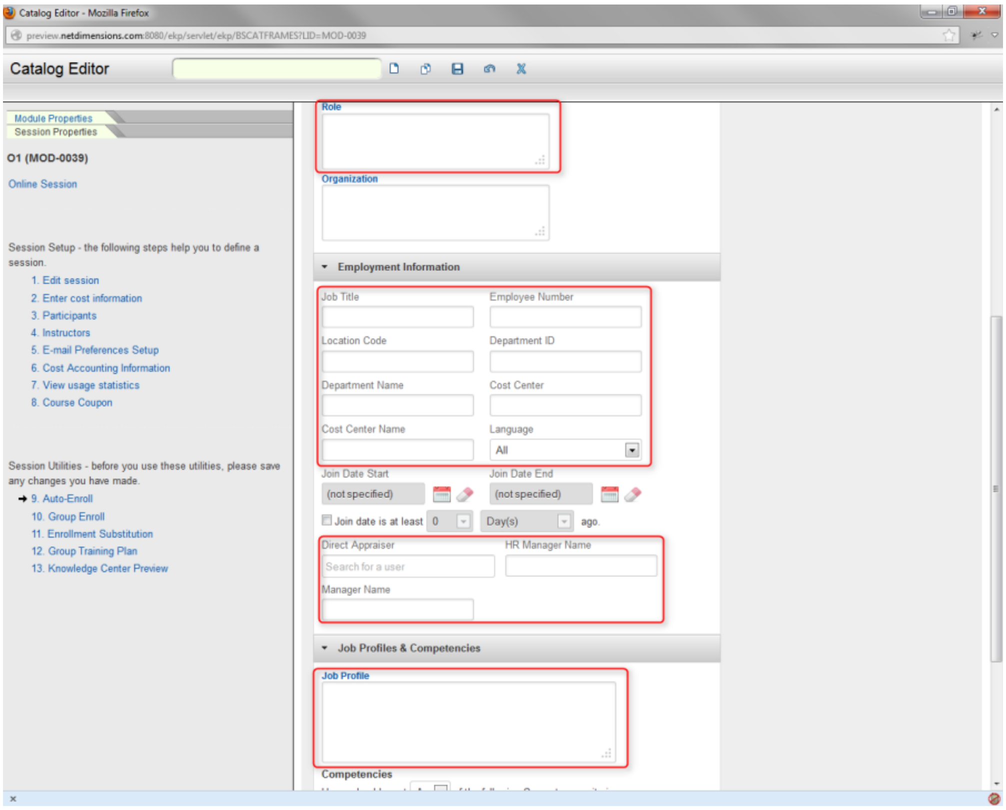
Auto Enroll Enhancement

(applies to NetDimensions Talent Suite)

The following criteria are added to the auto enroll page in catalog editor:

1. Location
2. Direct Appraiser
3. HR Manager

4. Manager
5. Cost Center
6. User Attribute Extensions
7. Employee Number
8. Competency
9. Role



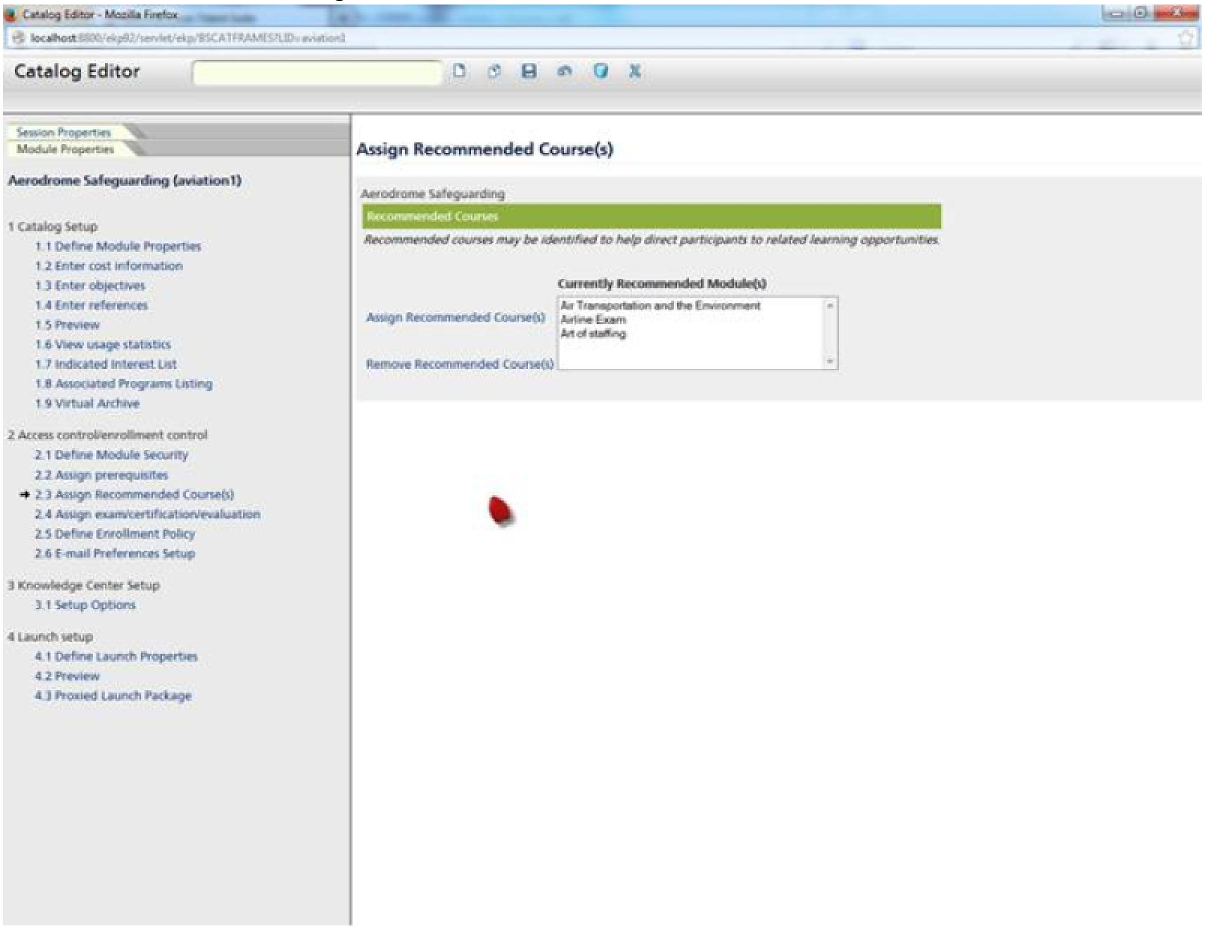
Users who satisfy all the criteria will be auto enrolled into a module.

Recommended Courses

(applies to NetDimensions Talent Suite)

Each learning object can now have a list of associated courses that are "recommended" by the instructor or administrator. These are added as properties to an existing course in the Catalog Editor as shown in the screen snapshot below. For the user these will show as additional items on the catalog description page. If no recommended courses are configured, the additional "Recommended Courses:" category does not show.

Going forward this functionality will be built upon to enable new options in presenting information to users. In a future update a mechanism will be added to enable the system to "auto-populate" the list of recommended courses based on related course use for other users who have taken the course in question. This is similar to the Amazon "Others also liked..." functionality. In the initial release it is an instructor/administrator configured list.



Enrollment Policies

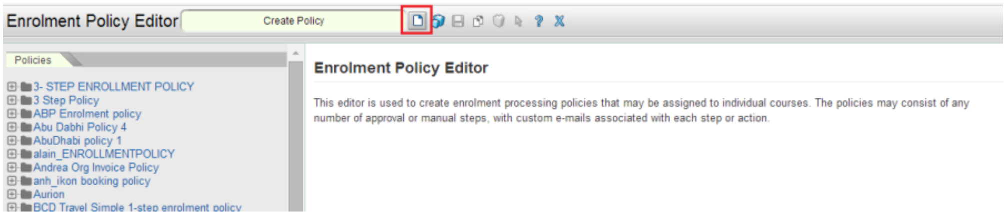
(applies to NetDimensions Performance NetDimensions Learning)

Adding Enrollment Policies

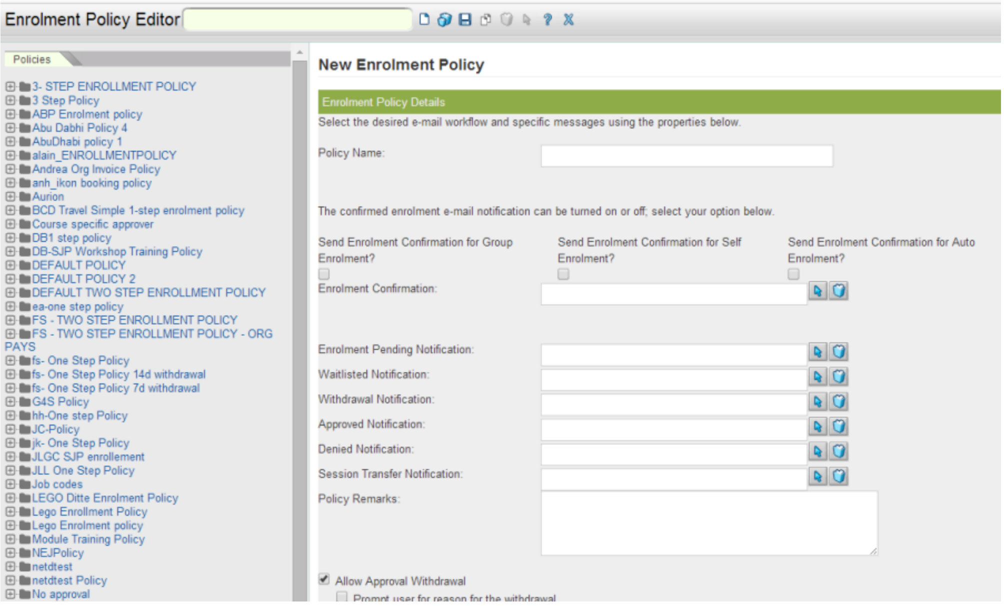
To create enrollment policies:

1.Access **Manage Center > Learning > Enrollment Settings > Enrollment Policy Editor**.

2.Click on the **Create** icon on the top of the page.



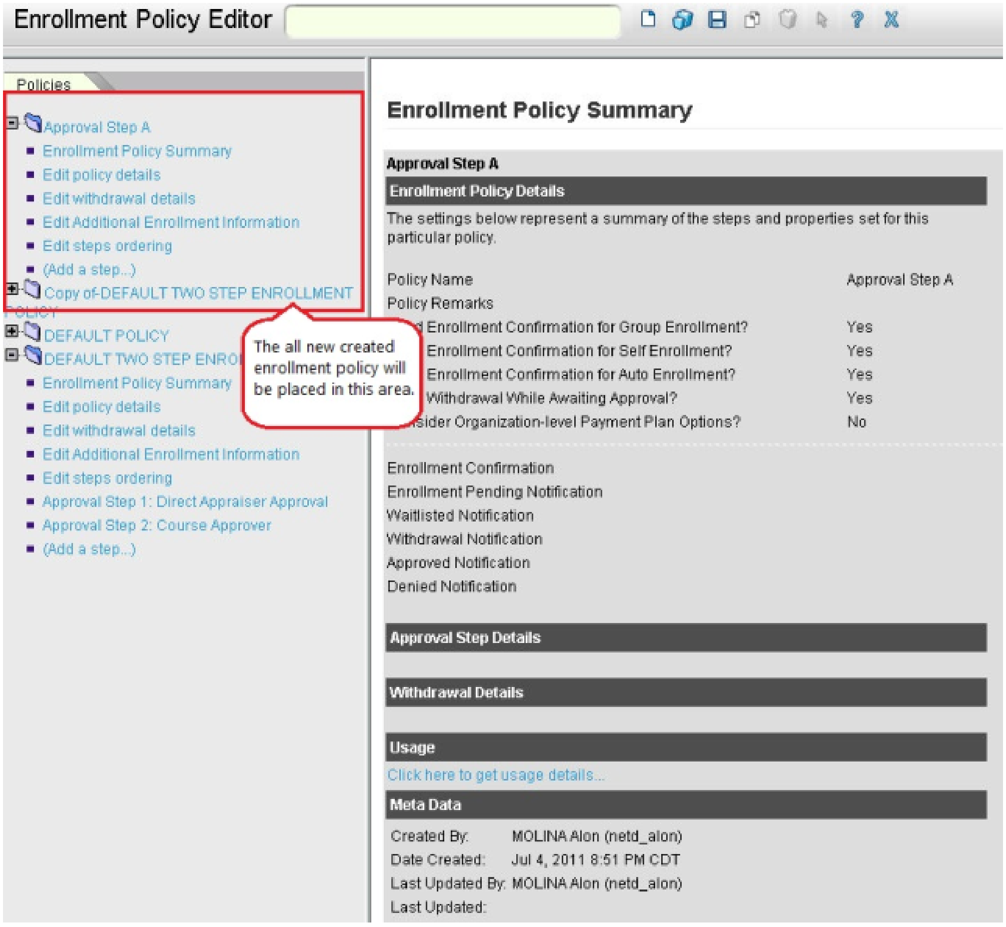
3.The *New Enrollment Policy* screen appears.



4.Fill in the details.

5.Select the notifications that shall be sent for the different events, such as enrollment or withdrawal.

6.Once the required information has been entered, click the **Save** button. The newly created enrollment policy will added on the left navigation side bar of the **Enrollment Policy Editor**.



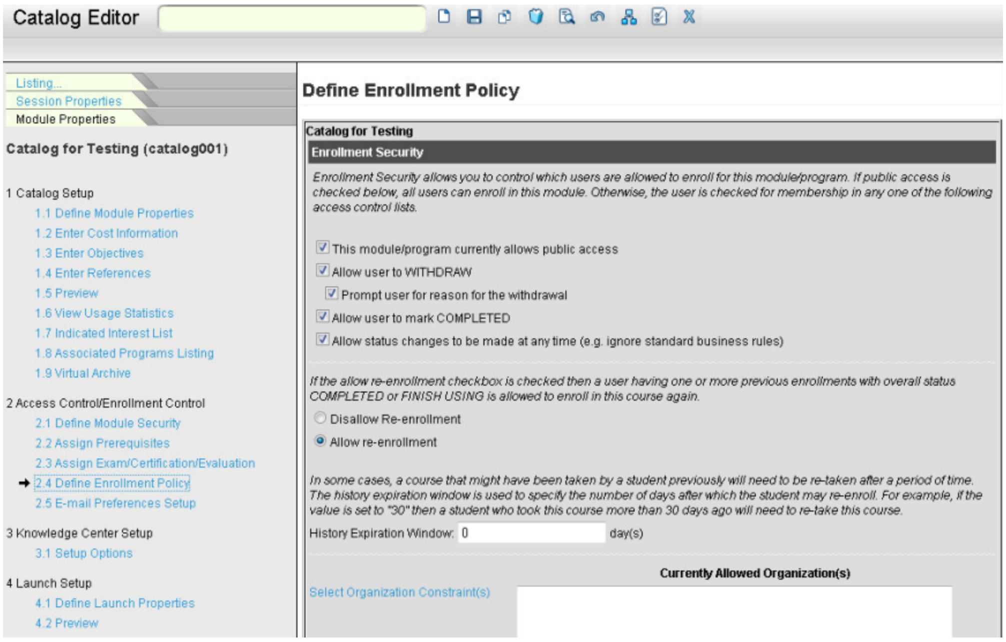
Associate Enrollment Policies with a Learning Module

To define the enrollment policies to be associated with a particular course:

1.Access **Manage Center > Learning > Catalog General Settings > Catalog Editor**.

2.Choose a Learning Module.

3.Click on the **Define Enrollment Policy** hyperlink in the left navigation pane. The *Define Enrollment Policy* screen appears.



Note that the screen displayed above may vary according on the type of learning object selected.

4.Specify whether public users are allowed to access this learning object, click on the box in the This module/program currently allows public access field.

5.Specify whether users will be allowed to WITHDRAW from a course.

6.Specify whether users will be allowed to mark COMPLETED

7.Specify whether users will be allowed to make changes to their enrollments, click on the box in the Allow status changes to be made at any time field.

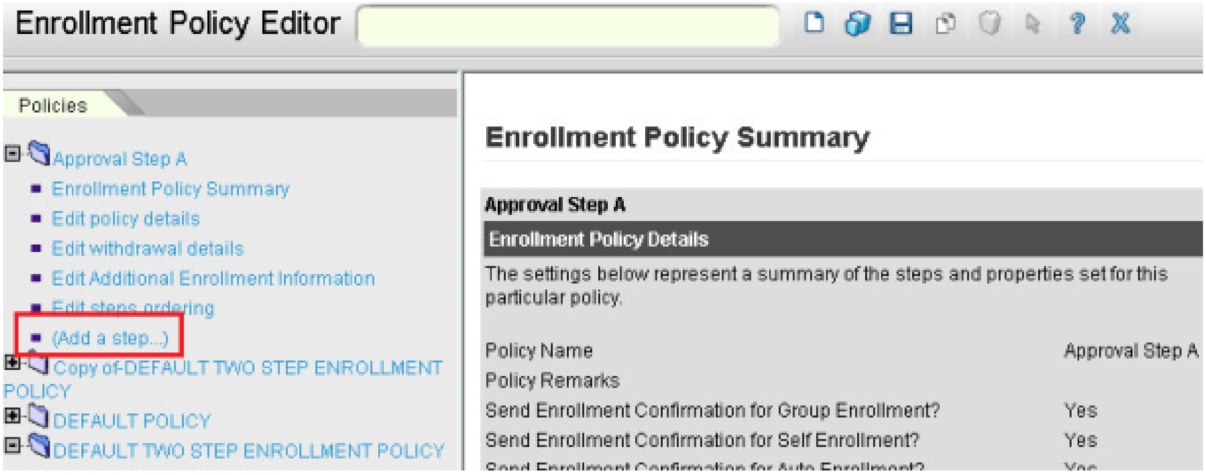
1. **Specify Permissions**
2. To specify which organizations are allowed access to this module, click on the **Select Organization Constraint(s)** hyperlink. Select the organization.
3. To remove an organization, click on the organization and then click the **Remove Assigned Organization(s)** hyperlink.
4. To specify which participants are allowed access to this module, click on the **Assign User Constraint(s)** hyperlink. Select the organization
5. To remove an organization, click on the organization and then click the **Remove Assigned User(s)** hyperlink.
6. To specify an associated enrollment policy, click the **Select** icon by the Pollicy Name field.
7. To remove a policy, click the **Delete** icon.
8. To save these settings, click the **Save** icon at the top of the *Catalog Editor* screen.

A confirmation dialog box appears. Click **OK**

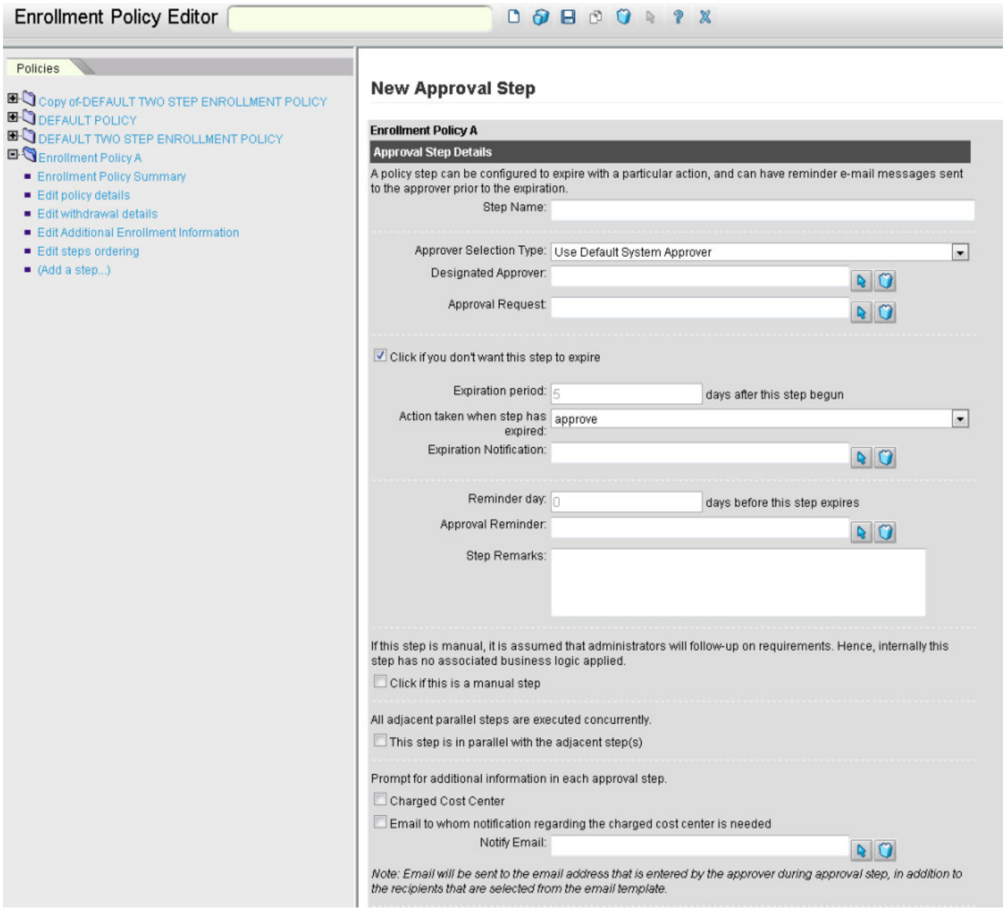
Specify Policy Steps

To specify a multi-step enrollment process in the Enrollment Policy Editor:

1.Click on the (Add a step ...) hyperlink in the Policies column in the left navigation pane.



2.The *Approval Step Details* screen appears.

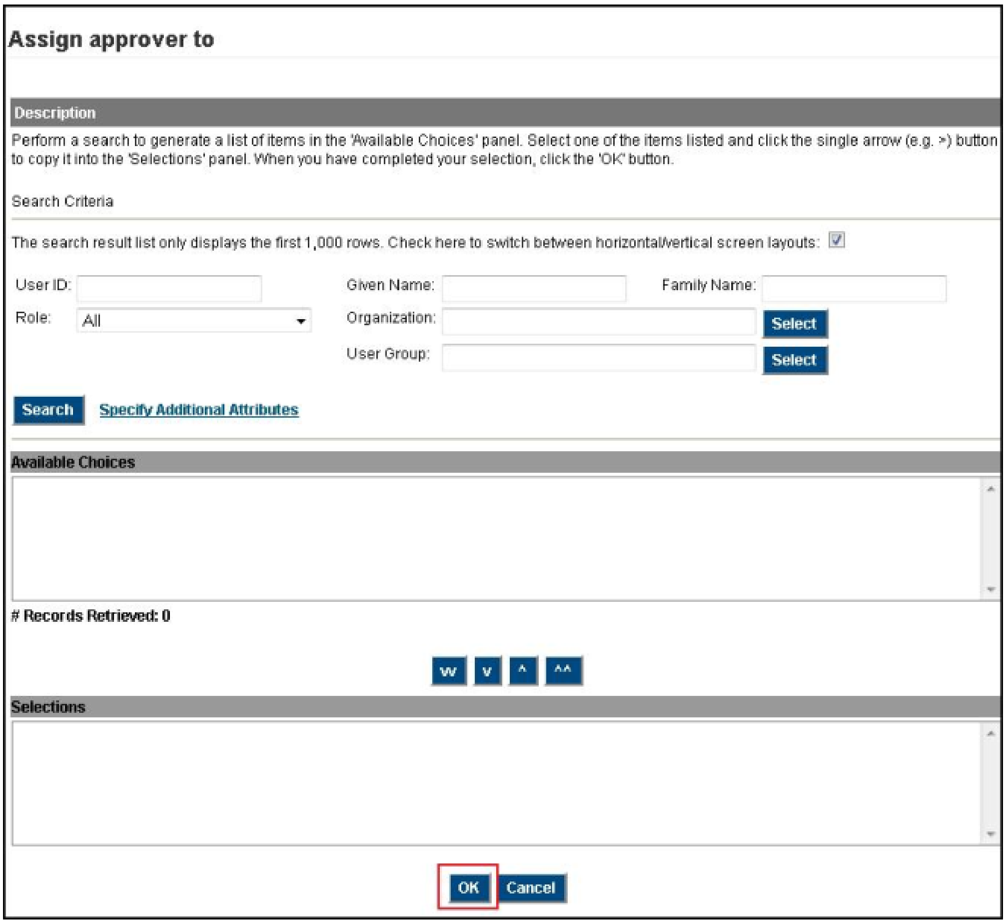


3.Specify the designation in the Step Name field.

4.Select the selection type. Click on the drop-down menu by the Approver Selection Type field and then click on the desired selection from the list that appears.

5.Select the Designated Approver.

6.To assign an approver, click on the Select icon. The assigned approver to screen appears.



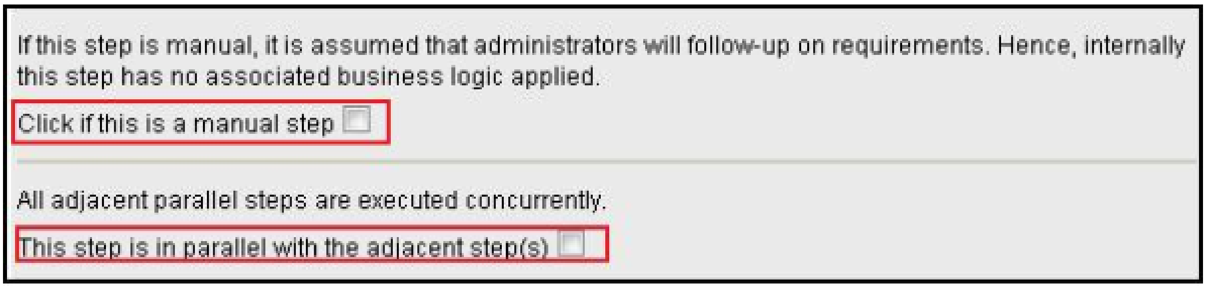
7.Make your selection from the Available Choices field.

8.Click **OK**.

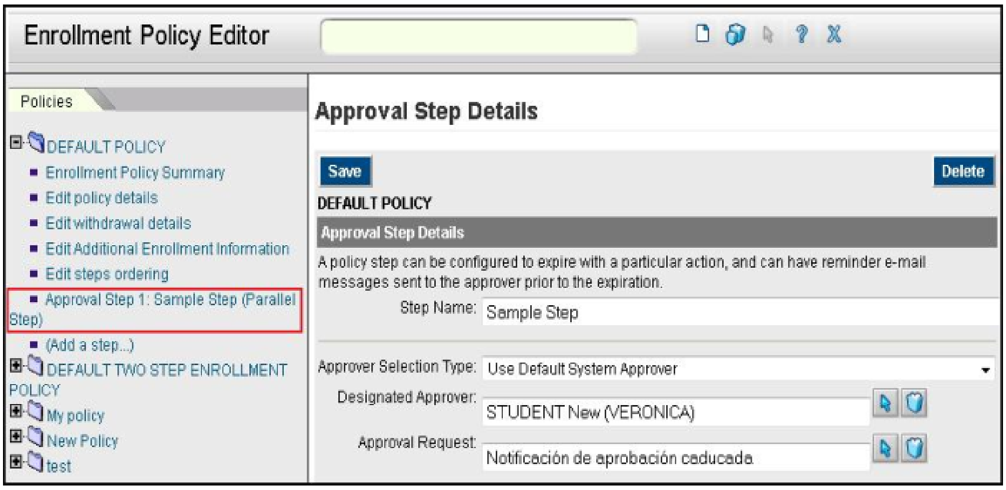
1. Step Expiration and Reminder Messages

2. To indicate that the step will expire, check the box by the Click if you don't want this step expire field.
3. Enter the expiration period in the Expiration period field and the associated action to be taken (upon expiration) in Action taken when step has expired field.
4. Click on the drop-down menu and click on the desired selection that appears.
5. Specify which preformatted e-mail messages will be sent upon expiration in the Expiration Notification field.
6. Specify the number of days prior to expiration that a reminder message will be sent in the Reminder Day field and which preformatted e-mail messages will be sent as a reminder in the Approval reminder field.
7. Enter comments in the Step Remarks field.

1. Manual Step



1. Should you prefer not to have any business logic applied to this step and have administrators follow up on requirements manually, scroll down and click on the **Click if this is a manual step** box.
2. If you want to run this step in parallel with other steps, check the box by the **This step is in parallel with the adjacent step(s)** box.
3. Click **Save**. The new step appears in the Policies column in the left navigation pane.



4.From here, proceed to:

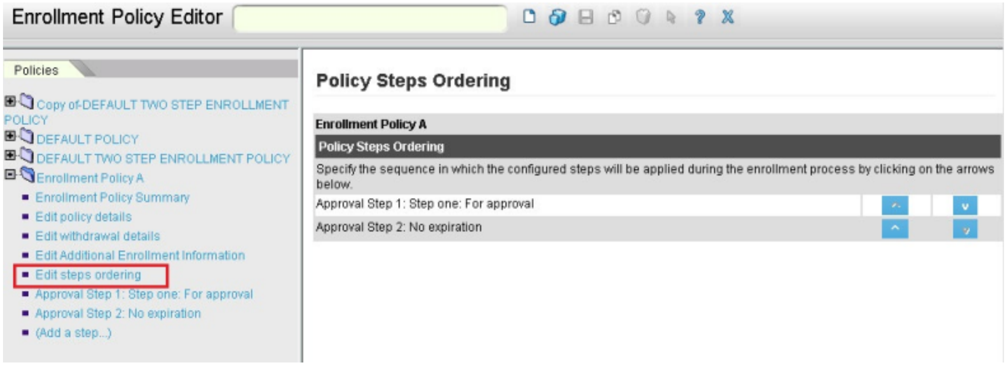
1. Add additional steps
2. Edit the order of the steps

5When you are finished, close the Enrollment Editor screen by clicking on the Close icon.

Editing the Order of the Steps

To specify the sequence in which the steps will be run:

1.Click on the Edit steps ordering hyperlink in the Policies column in the left navigation pane. The *Policy Steps Ordering* screen appears.



2.On this page, click the arrow up or down button of the step you want to move. For instance, given the example on the image above, you want the approval step 2 to be executed first, click the up arrow button of the selected step.

3.After modifying the sequence of the step, click the **Save** button to store the changes.

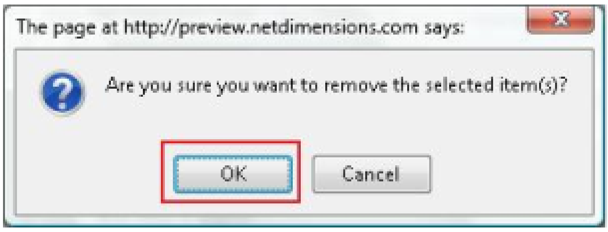
4.If you are finished, close the *Enrollment Editor* screen by clicking on the **Close** icon.

Deleting Steps

To delete a step:

1.Click on the desired step in the Policies column. The *Approval Step Details* screen appears.

2.Click **Delete** in the lower right corner of the page. The system prompts for confirmation.



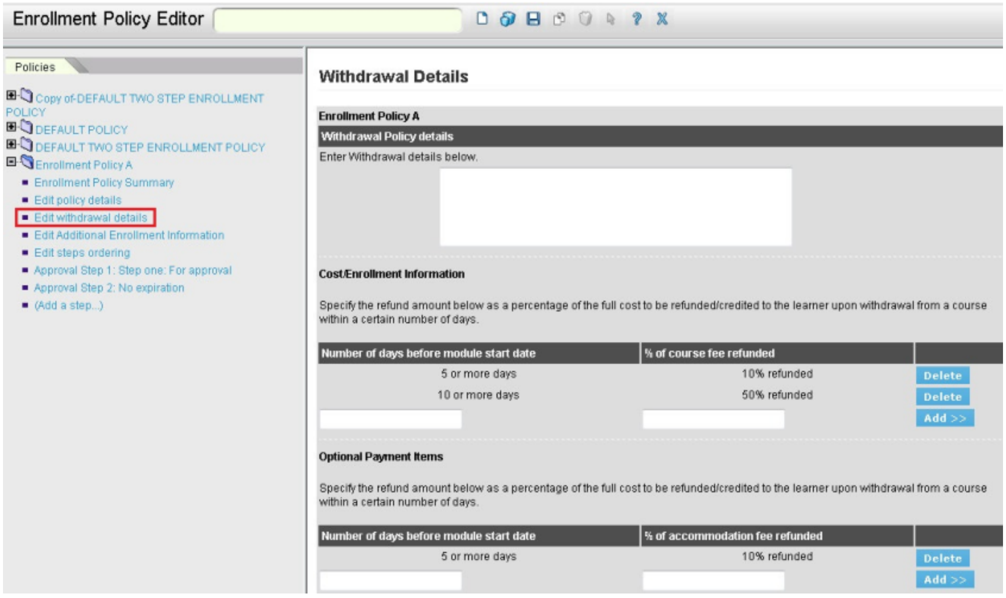
3.Click **OK**. The step is removed.

4.If you are finished, close the *Enrollment Editor* screen by clicking on the **Close** icon.

Withdrawal Penalties

You may specify penalties that a participant will incur should he/she withdraw from a course during a specified period. To specify withdrawal penalties:

1.Click on the **Edit withdrawal details** hyperlink in the Policies column in the left navigation pane.

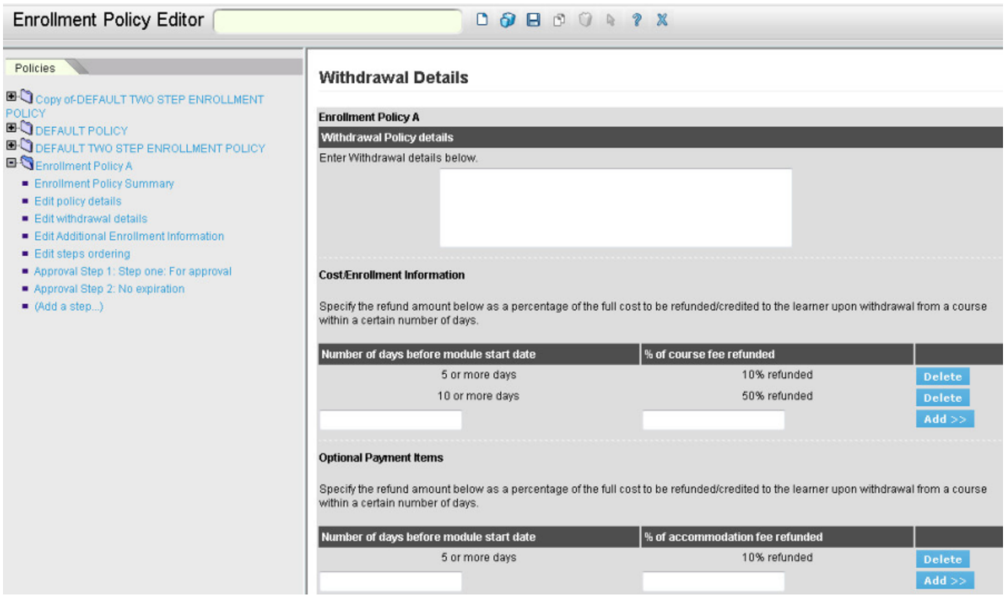


2.Enter the necessary details in the Enter Withdrawal details below field.

3.Enter the necessary details in the Number of days before module start date field.

4.Enter the percentage in the % of course fee refunded field.

5.Click the **Add >>** button. The screen refreshes.

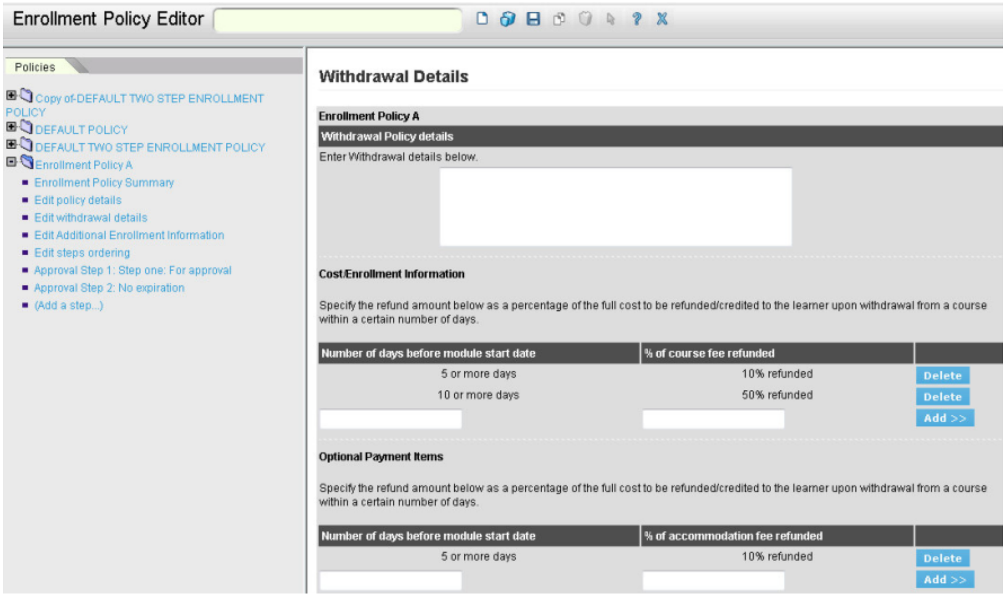


To add additional details, repeat steps 2, 3 and 4.

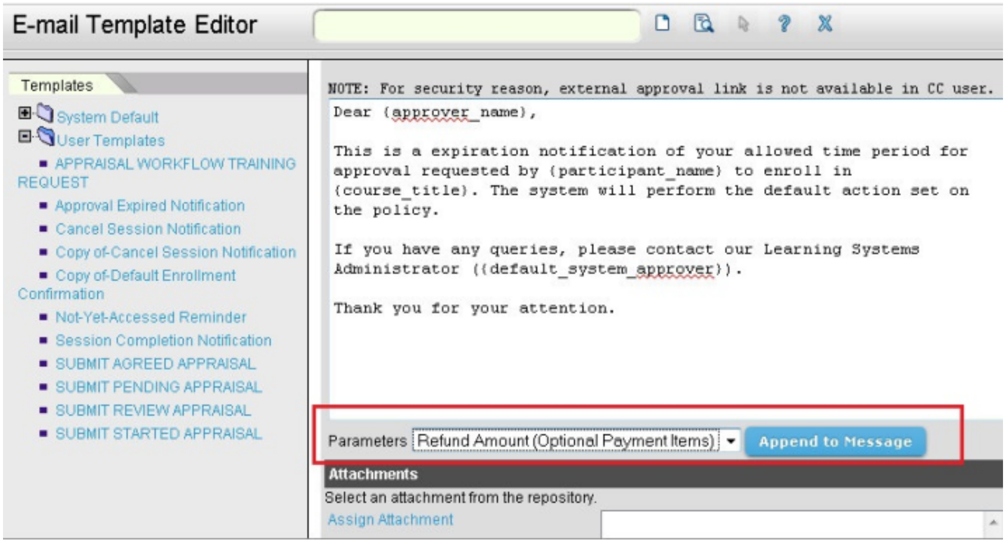
Withdrawal Policy for Optional Payment Items

An additional withdrawal policy is available on the course level and is applied to all optional payment items across all sessions. Thus there are two withdrawal policies available - one for the course cost and one for all the optional payment items.

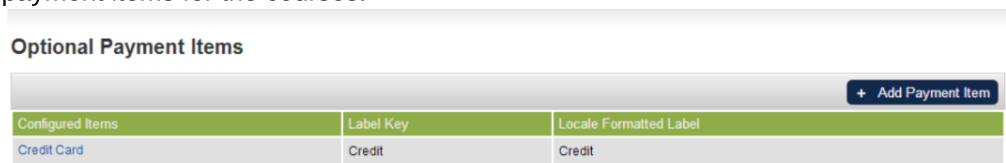
Withdrawal details for Cost/Enrollment and Optional Payment Items are separately defined. Items should be defined for Withdrawal Details on Optional Payment Items.



The parameter for the email template "**Refund Amount (Optional Payment Items)**" is available in *Em ail Template Editor*.



In Manage Center > Learning > Payment Manager > Optional Payment Items, you can add optional payment items for the courses.



Under the **Accounts** tab of **My Account Details**, Refund and Course Cost columns of the Optional Payment Items are also included.

Trans. ID	Entry Date	Course Title	Description	Quantity	Course Cost	Refund	Currency	Entered By
EKP000009601	Jun 25, 2010	online_w_payment	Online (with payment) (Enrollment Fee)(Plan "Account Customer" Discounted 0%)	1	[illegible]	[illegible]	United Kingdom, Pounds	System
EKP000009602	Jun 25, 2010	online_w_payment	Additional Nights	1	50	0	United Kingdom, Pounds	System
EKP000009603	Jun 25, 2010	online_w_payment	Wood Norton	1	25	0	United Kingdom, Pounds	System
EKP000009605	Jun 25, 2010	online2	Online 2 (Enrollment Fee)(Plan "Account Customer" Discounted 0%)	1	25	0	United Kingdom, Pounds	System
EKP000009606	Jun 25, 2010	online2	Additional Nights	1	50	0	United Kingdom, Pounds	System
EKP000009607	Jun 25, 2010	online2	Wood Norton	1	25	0	United Kingdom, Pounds	System
EKP000009608	Jun 25, 2010	online2	Withdrawal refund: Full Amount 100.0% of 25	1	0	25	United Kingdom, Pounds	System
EKP000009609	Jun 25, 2010	online2	Withdrawal refund: Additional Nights 100.0% of 50.0	1	0	50	United Kingdom, Pounds	System
EKP000009610	Jun 25, 2010	online2	Withdrawal refund: Wood Norton 100.0% of 25.0	1	0	25	United Kingdom, Pounds	System
EKP000009611	Jun 25, 2010	online_w_payment	Withdrawal refund: Full Amount 100.0% of 25	1	0	25	United Kingdom, Pounds	System
EKP000009612	Jun 25, 2010	online_w_payment	Withdrawal refund: Additional Nights 100.0% of 50.0	1	0	50	United Kingdom, Pounds	System
EKP000009613	Jun 25, 2010	online_w_payment	Withdrawal refund: Wood Norton 100.0% of 25.0	1	0	25	United Kingdom, Pounds	System
				Totals	240	240	United Kingdom, Pounds	

Delete a Withdrawal Detail

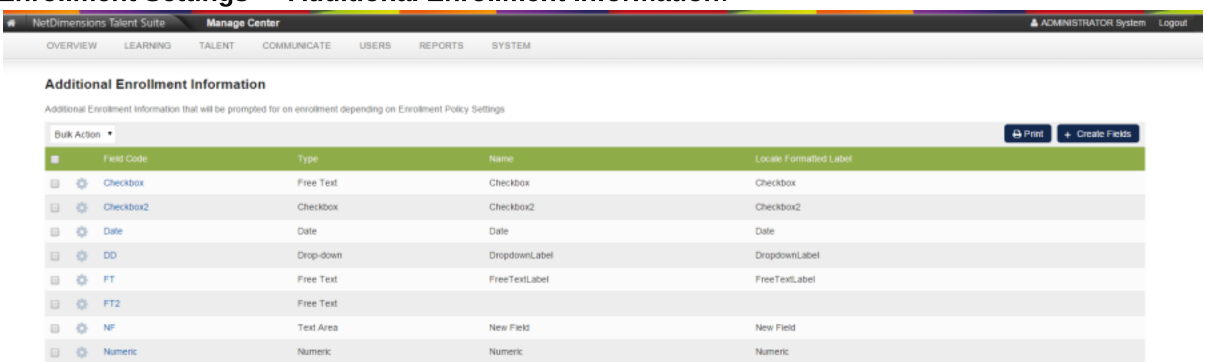
To delete a withdrawal detail, click the **Delete** button by the line item you wish to remove.

Configurable Additional Enrollment Information

It is common that on requesting for a course enrollment, additional information is to be requested from the user, for example, information required to make a reservation that relates to taking this course. The required additional information can come in various input formats. The current available fields are limited for usage in certain situations, flexibility can be further extended to accommodate capturing information of different input types thus introducing customized fields. Similar to other attribute types, an Additional Enrollment Information field supports the same set of data types to be presented to user to input the additional information at enrollment time.

Configuration

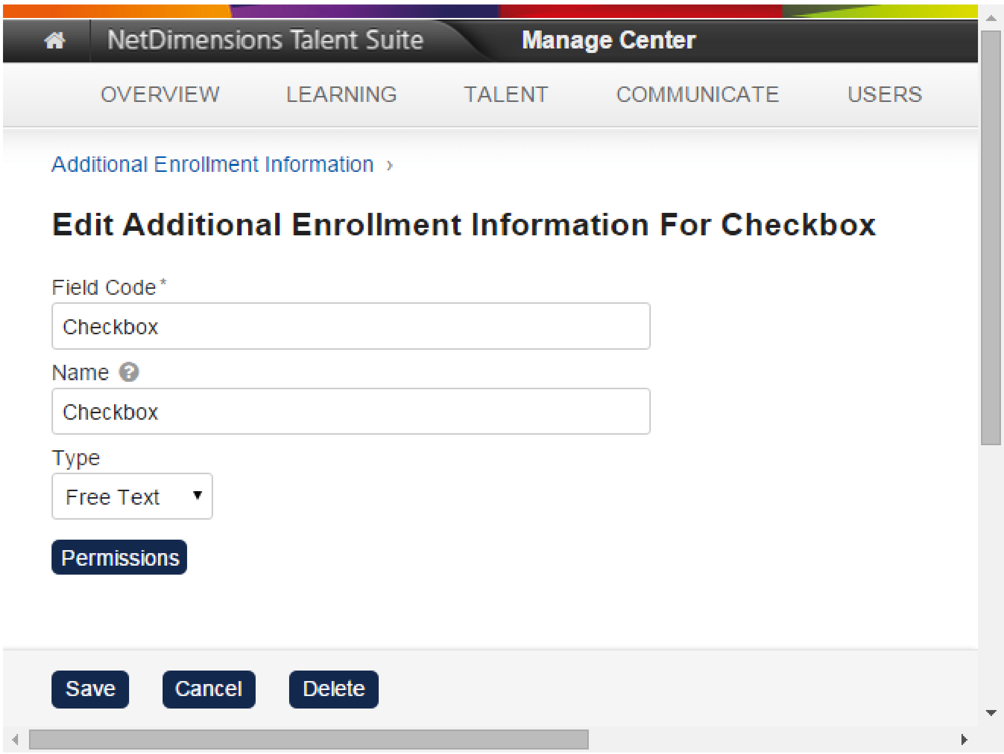
A custom Additional Enrollment Information field can be set up by an Administrator via **Learning -> Enrollment Settings -> Additional Enrollment Information**.



Field Code	Type	Name	Locale Formatted Label
Checkbox	Free Text	Checkbox	Checkbox
Checkbox2	Checkbox	Checkbox2	Checkbox2
Date	Date	Date	Date
DD	Drop-down	DropdownLabel	DropdownLabel
FT	Free Text	FreeTextLabel	FreeTextLabel
FT2	Free Text		
NF	Text Area	New Field	New Field
Numeric	Numeric	Numeric	Numeric

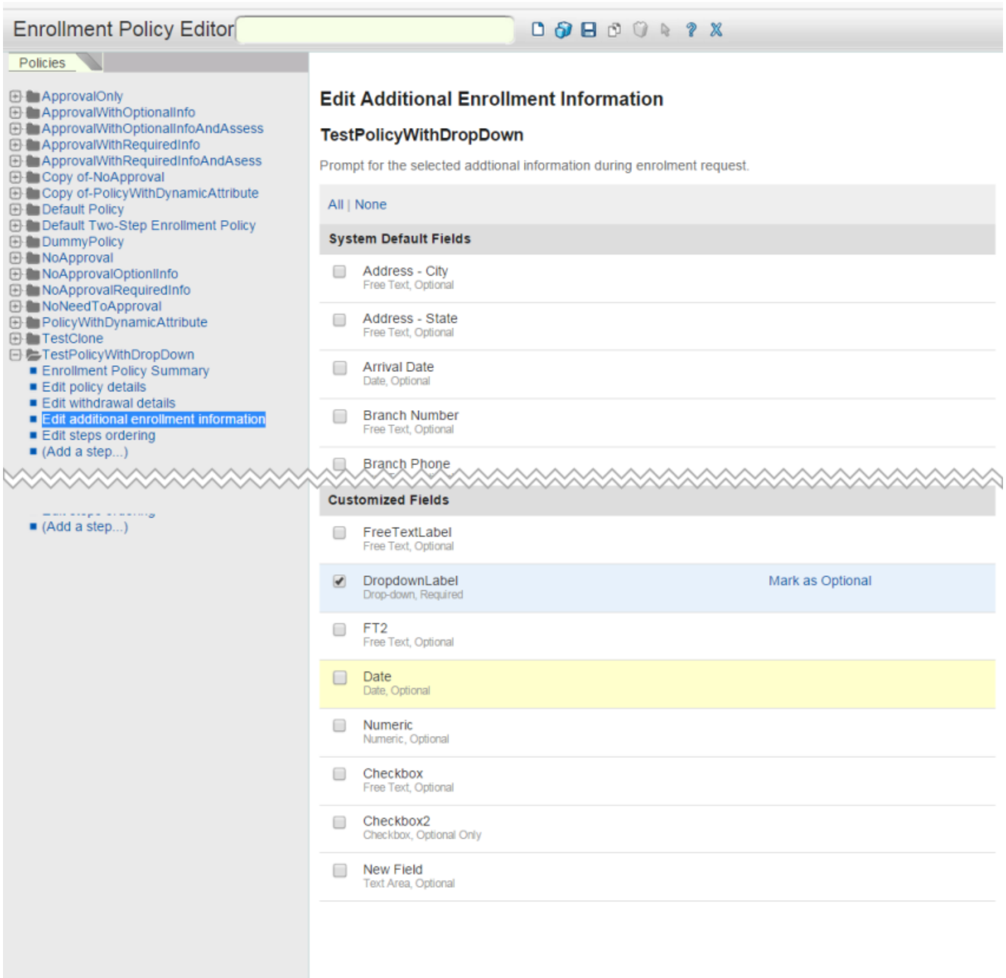
The following are the configurable properties of a custom Additional Enrollment Information field:

1. ***Field Code*** – A unique identifier
2. ***Name*** – The display name of the attribute. Language properties can be used here to display the attribute name in different languages.
3. ***Type*** – The format of the attribute. (Available types: Free Text, Date, Drop-down, Numeric, Checkbox)



Enrollment Policy Editor

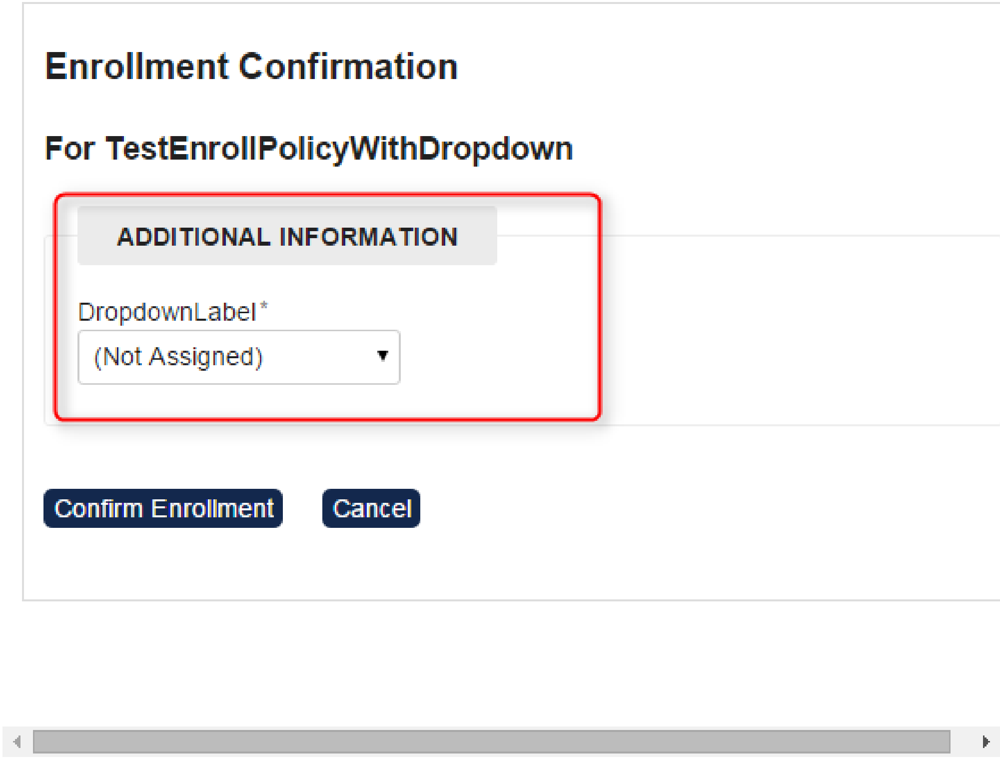
Configured Additional Enrollment Information fields will show up in the "***Edit additional enrollment information***" section in the enrollment policy. Note that the list is separated into two sections, one for displaying the previously supported fields as "System Default Fields" and another section showing the newly customized fields configured.



By selecting the checkbox beside the Additional Enrollment Information field, the selected Additional Enrollment Information field will be a required field to be filled in on enrollment. By default, an Additional Enrollment Information field is set to be optional, It can be toggled to be as required by selecting the "Mark as Required" action.

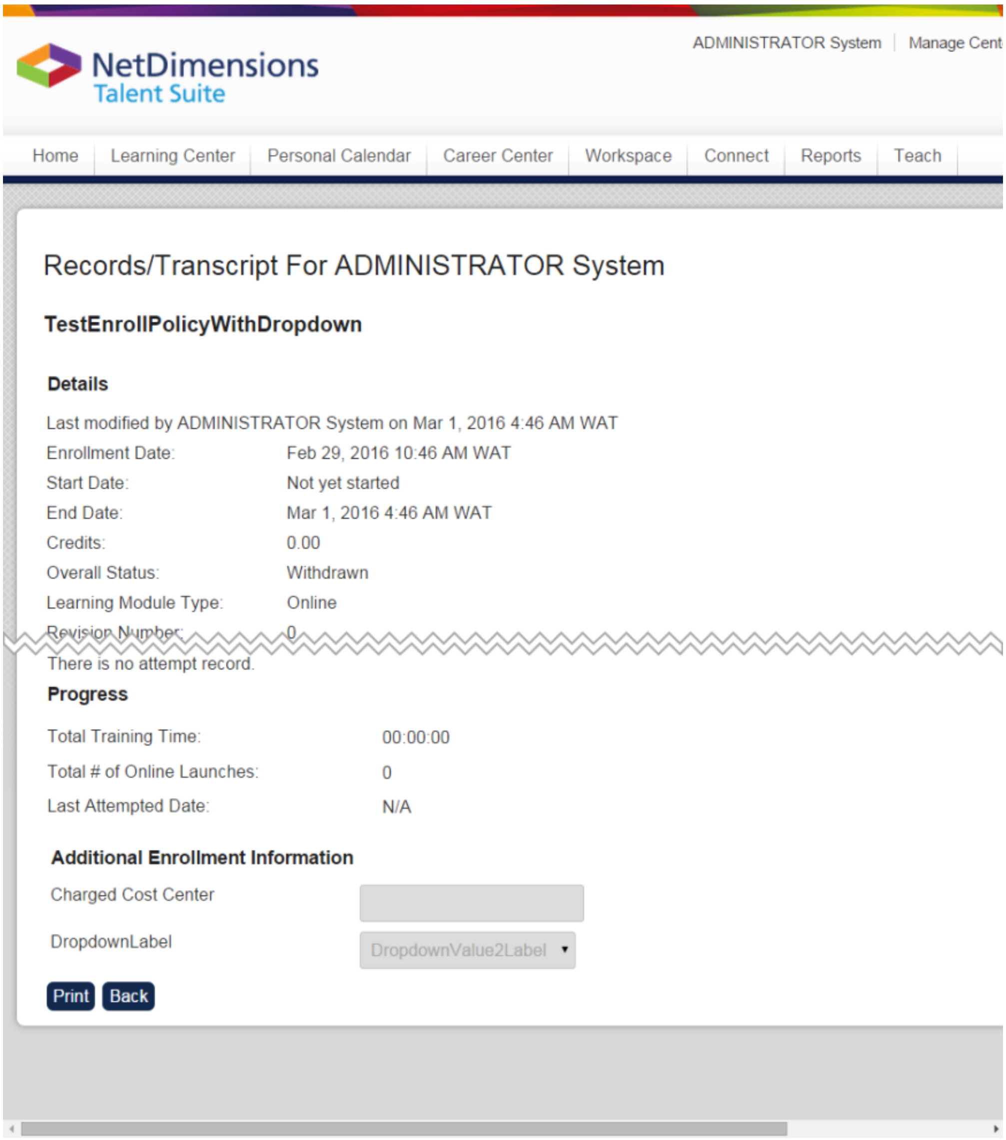
Enrollment

When a learner confirms the enrollment of the course, the configured Additional Enrollment Information fields will be presented for learner to enter.



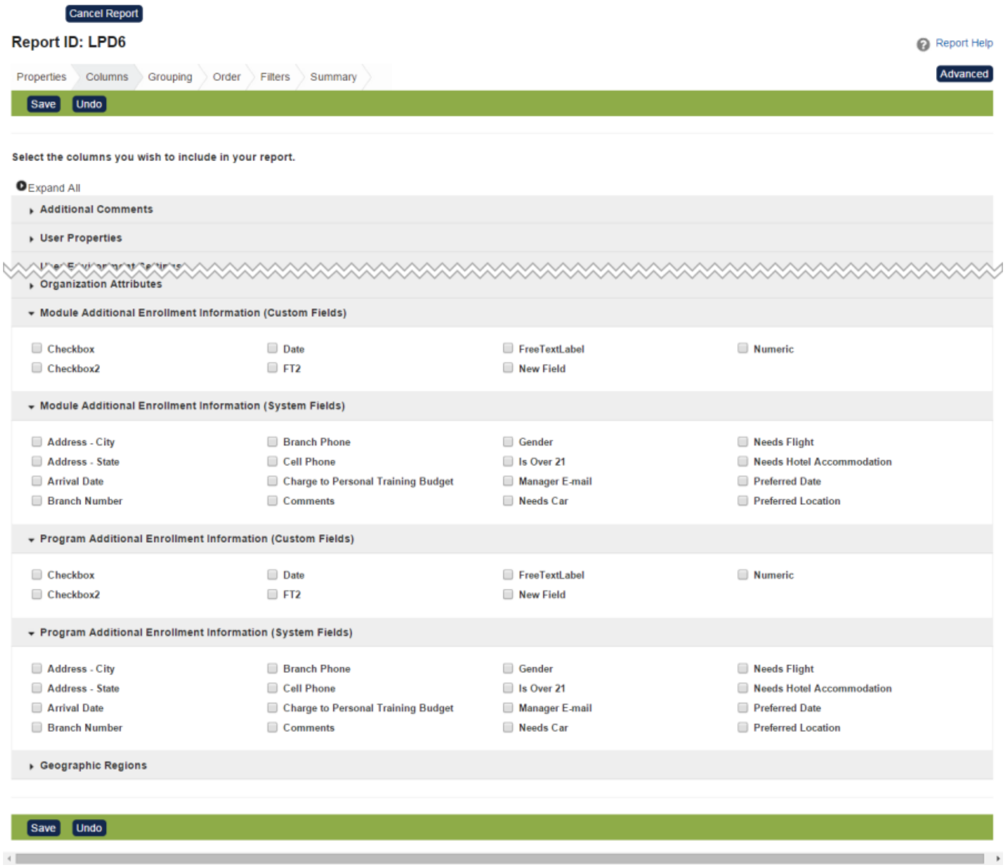
Transcript Details

The Additional Enrollment Information will be available for display in the bottom part of the transcript details if the System Configuration setting "Show additional enrollment information in records/transcript." is enabled.



Reporting on Additional Enrollment Information

Similar to other types of attribute fields, the Additional Enrollment Information fields are dynamically made available for selection to be reported in the Report Wizard. Note that because of the way different field types and different learning object types associated to a transcript record are stored, they are grouped into the 4 separate sections for selection as shown in the table below.



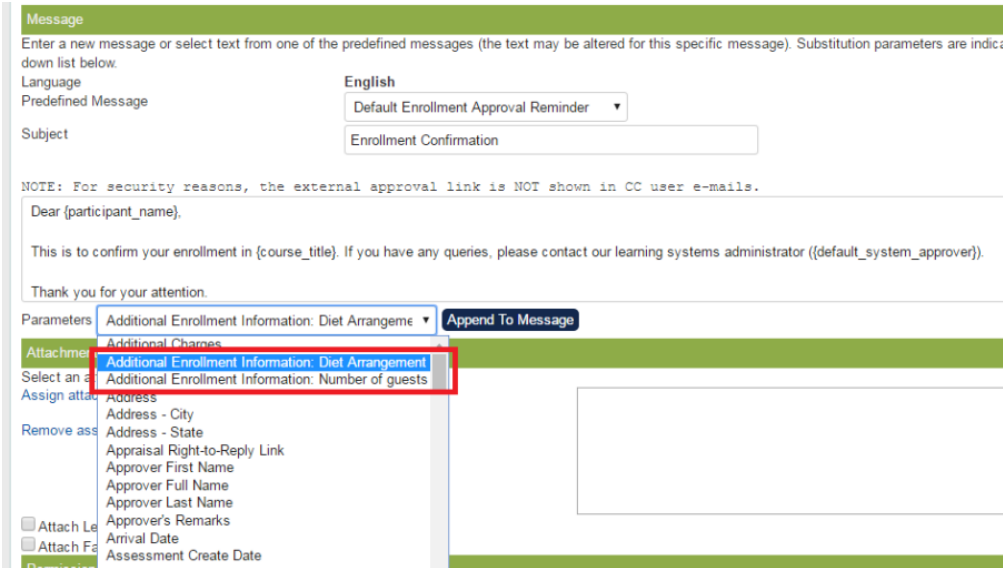
The table below lists the availability of each Additional Enrollment Information column group for the relevant report types:

Column Group	Available Report Type
Module Additional Enrollment information (Custom Fields)	1. Training History 2. Learning Program Detail
Module Additional Enrollment information (System Fields)	1. Training History 2. Learning Program Detail
Program Additional Enrollment information (System Fields)	1. Learning Program Detail
Program Additional Enrollment information (System Fields)	1. Learning Program Detail

Additional Enrollment Information as E-mail Parameters

Since Additional Enrollment Information fields are available, it would be useful to include the information entered by the user on registration in email notifications like the enrollment request email. Therefore, for both System Default and Customized ones, are made available as e-mail parameters, to allow e-mail templates to include the additional enrollment information where applicable. The existing System Default ones are included in the parameter selection list while the Customized ones are dynamically generated as well.

Customized Additional Enrollment Information attributes will be available in the parameters list with the prefix "***Additional Enrollment Information:*** ".



Below are the ***System Default Additional Enrollment Information Fields*** which are now available as E-mail parameters.

1. Address - City
2. Address - State
3. Arrival Date
4. Branch Number
5. Branch Phone
6. Cell Phone
7. Charge to personal training budget (Y/N)
8. Comments
9. Gender
10. Is Over 21
11. Manager E-mail
12. Needs Car
13. Needs Flight
14. Needs Hotel Accommodation (Y/N)
15. Preferred Date
16. Preferred Location

Additional Enrollment Information at Teach Participants

The Review Participants list via Teach gives an overview of the session being looked at that can assist with course administration. When looking at the enrollments of a particular session, it's helpful to see the additional enrollment information of the enrollment but this was only accessible if you click into the individual transcripts making it difficult to identify at a glance, for example, how many participants are vegetarian. Additional Enrollment Information fields can be added to the Review Participants table list as display columns for selection. They include both the System fields and Custom fields.

Automatic Enrollment

(applies to NetDimensions Talent Suite)

It is possible to define automatic enrollment rules ('auto-enroll' rules) for both module and program sessions to ensure that specified groups of learners are automatically enrolled when they first log into the Talent Suite, even if those learners do not have accounts with the system.
These can be used, for example, to deliver staged orientation training using NetDimensions Performance application or solicit feedback from new hires by assigning a short survey a month or two after they join the organization.

This behavior is configurable allowing you to establish learning paths by ensuring that the auto-enroll rules are only enforced after all prerequisites for the module are satisfied. For example, an administrator could create an Advanced Project Management program or module, with an Introduction to Project Management program or module as a prerequisite, then define auto-enroll rules for the appropriate learner groups. Once a learner in one of the appropriate groups has completed Introduction to Project Management she will automatically be enrolled in Advanced Project Management the next time she logs into the system.

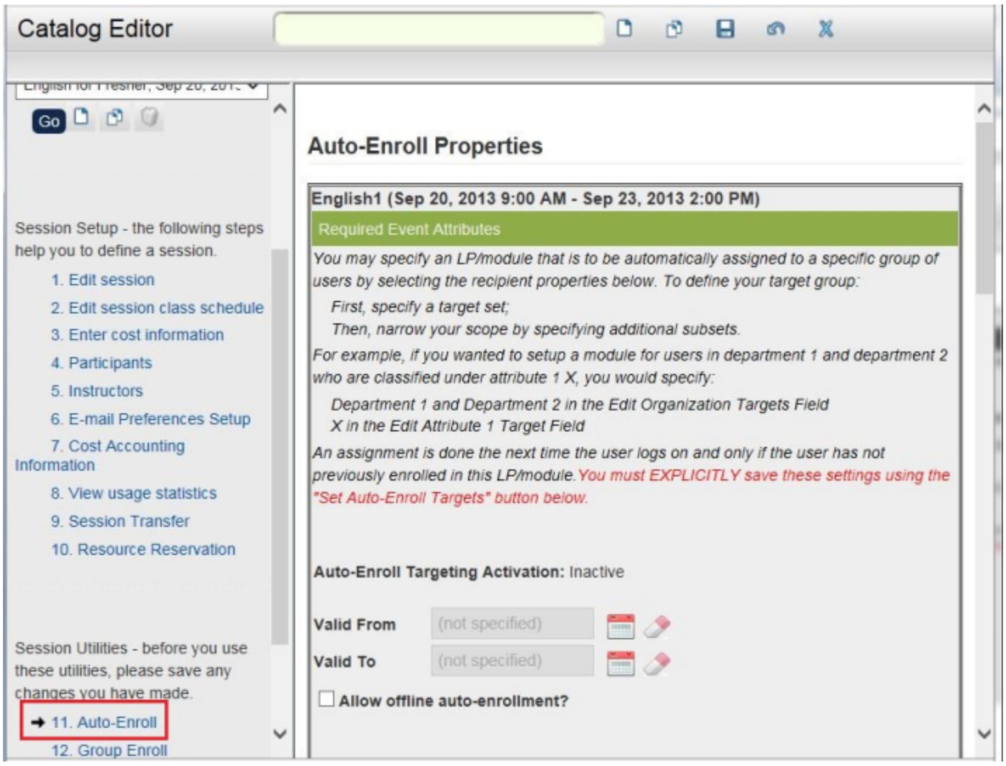
Setting Up Auto-Enrollment

To set up auto-enrollment (i.e. 'Auto-enroll'), Locate the course for which you wish to set up auto-enrollment functionality in the Catalog Manager or follow the normal procedures for creating a course (refer to the chapter on courseware management.)

1.Click on the **Sessions Properties** tab in the *Catalog Editor* in the left navigation pane.

2.Select **Auto Enroll**.

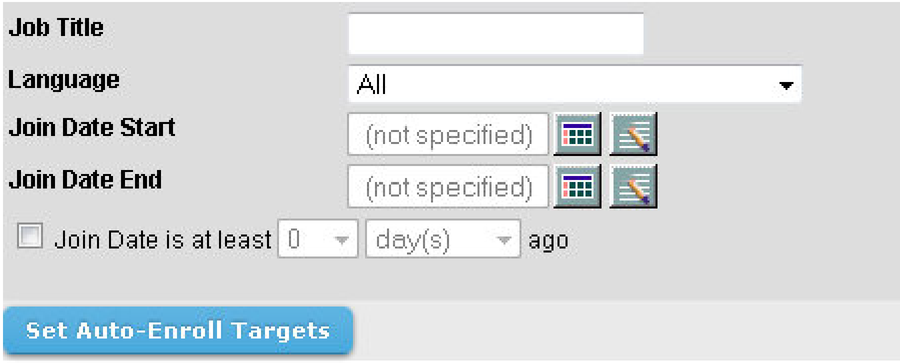
3.Select the users to whom you wish to assign auto-enrollment functionality.



4.You may also specify other criteria (e.g. job title, job start date, length of employment, etc)

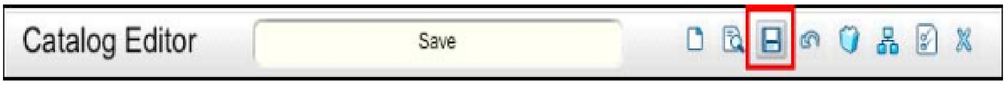
5.Scroll to the bottom and click **Set Auto-Enroll Targets**.

6.Click the **Save** icon.



7.Scroll to the bottom and click **Set Auto-Enroll Targets**.

8.Click the **Save** icon.



9.After auto-enrollment functionality has been set up, users should receive an on-screen prompt and be able to see the new module they will be automatically enrolled in.

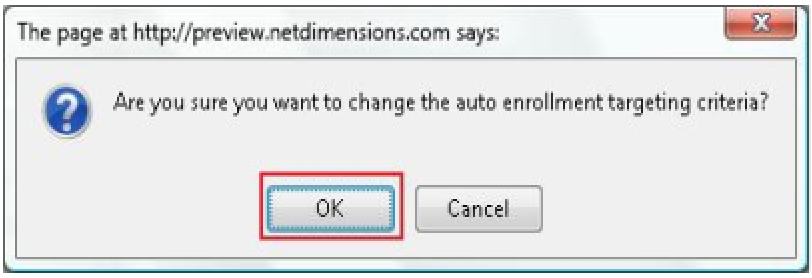
Specify Auto Enrollment Properties

To specify the Auto Enroll properties from the Catalog Editor:

1.Click the **Auto Enroll** hyperlink. The *Auto Enroll Properties* screen appears.

2.Tick the box to allow learner to do offline auto-enrollemnt.

3.After setting the targets and dates, click **Set Auto Enroll Targets**. A confirmation dialog box appears in a separate window.



4.Click **OK**. The system returns an acknowledgement.

5.Click **OK**.

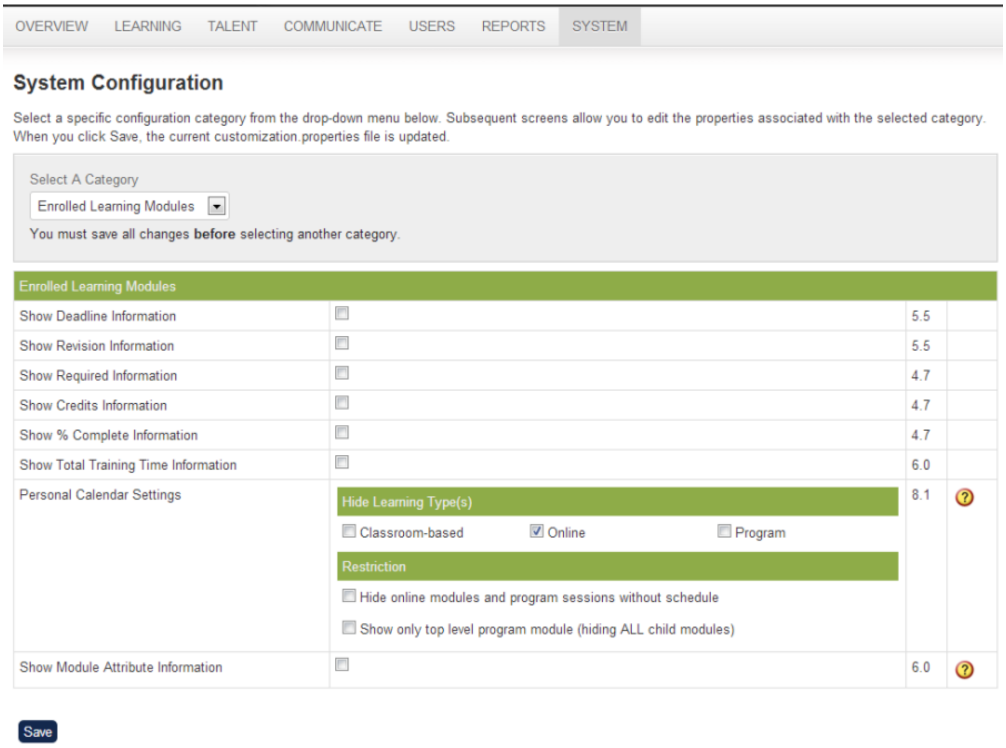
6.To save these settings, click the **Save** icon at the top of the *Catalog Editor* screen. A confirmation dialog box appears.

7.Click **OK**.

Configure Automatic Enrollment Rules

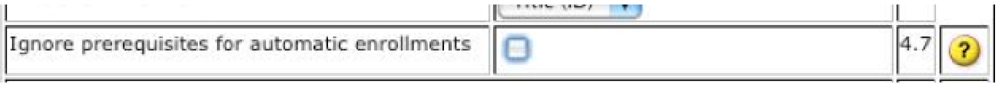
Automatic enrollment rules can be configured to establish paths of learning such that all prerequisites must be satisfied before auto enroll rules take effect. To do so:

1.Access **Manage Center > System > General Settings > System Configuration**. The *System Configuration* page appears.



2.In the Select a category field, select 'General' from the drop down list.

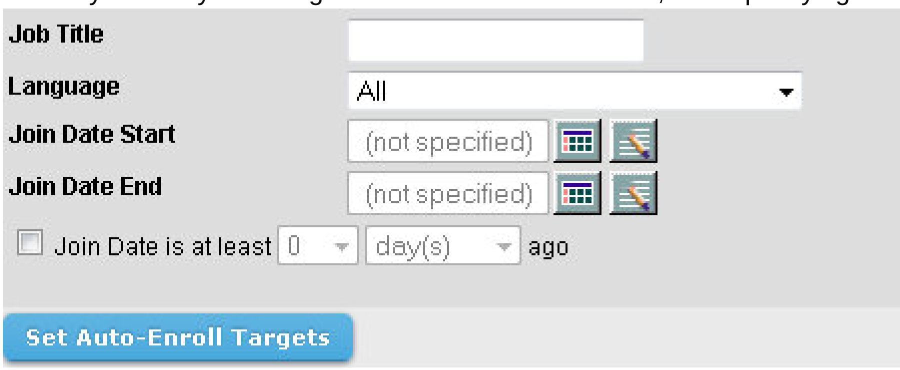
3.Disable the Ignore prerequisites for automatic enrollments property.



Automatic Enrollments Based on Elapsed Time since Join Date

For those looking to deliver staged orientation training using the Talent Suite or solicit feedback from new hires by assigning a short survey a month or two after they join the organization, you can define an auto-enroll rule based on the time elapsed after the learner's Join Date.

You may do so by checking the Join Date is a least field, then specifying the elapsed time.



Auto-Enroll Console

The Auto-Enroll Console allows you to configure settings to control auto-enroll scanning.

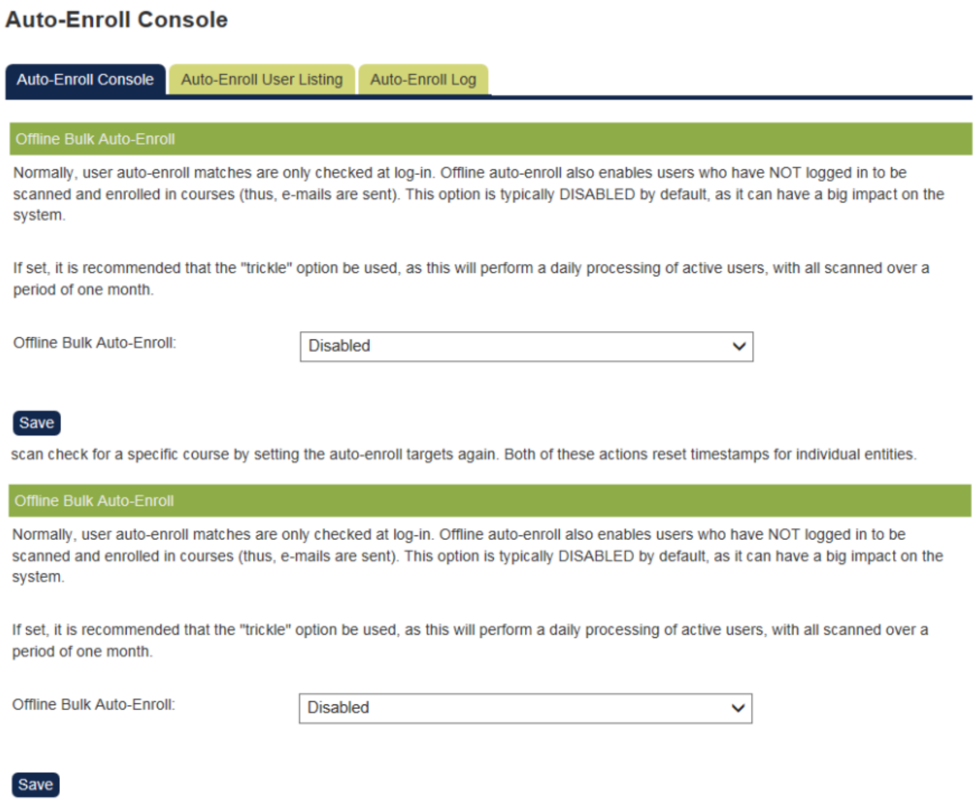
Criteria Scan Interval

At login, a check is typically made against course auto-enroll criteria IF the criteria or user has changed since the previous check. These other options enable you to ensure that new checks are done at a guaranteed interval, even if there are no obvious changes.
Changing this option will impact the "**criteria check needed**" timestamp of every course. Note that checking is only performed when a user logs into the system.
Options include:

1. Initiate New Check Only When Individual Module Criteria Or User Attributes Change
2. Initiate New Check For Every Targeted Course At Every Login
3. Initiate New Check For Every Targeted Course Each Week
4. Initiate New Check For Every Targeted Course Each Month

To choose an option:

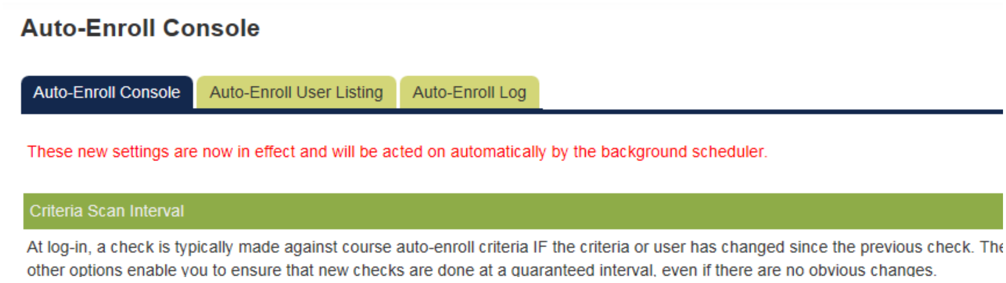
1.Access **Manage Center > Learning > Enrollment Settings > Auto-Enroll Console**. The *Auto-Enroll Console* page appears.



2.Choose an option from the drop-down list next to the Criteria Scan Interval field.

3.Click **Execute**. A confirmation dialog box appears.

4.Click **OK**. The change is acknowledged.



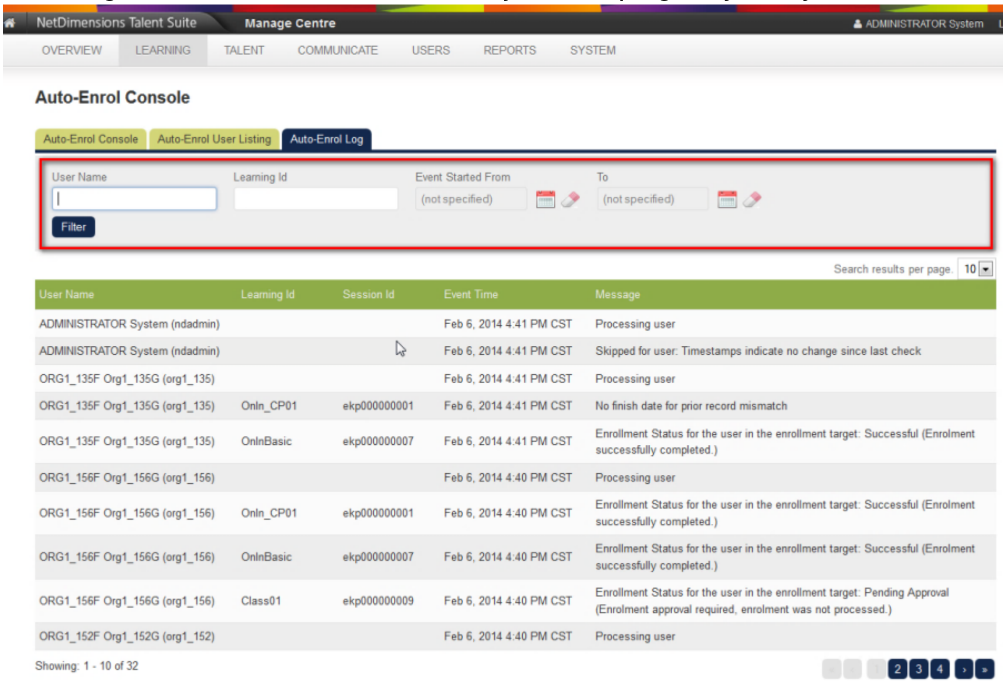
Note: You can always cause a specific user to "**scan**" again by modifying their properties in the User Editor. Likewise, you can cause a new scan check for a specific course by setting the auto-enroll targets again. Both of these actions reset timestamps for individual entities.

Auto-Enroll Log

(applies to NetDimensions Talent Suite)

The auto-enroll log page allows administrative users to read the log through the Talent Suite user interface within the Enrollment Settings menu. Filters have been added to the Auto Enroll log so that an administrator could filter the logged entries by User Name, Learning ID, Event Started From or to. The filters can actually improve performance on the log listing screen as less entries would be returned by applying filtering instead of returning all entries which could amount to quite a lot.

Note: Log entries that are older than 30 days will be purged by the system automatically.



Offline Bulk Auto-Enroll

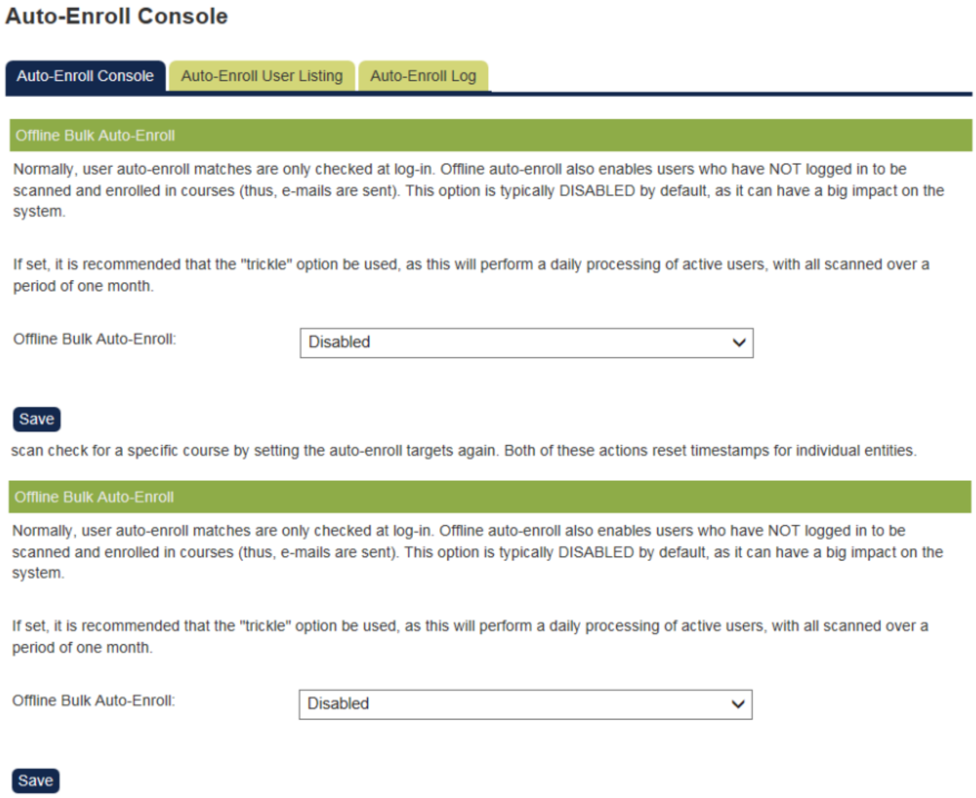
Normally, user auto-enroll matches are only checked at login. Offline auto-enroll also enables users who have NOT logged in to be scanned and enrolled in courses (thus emails are sent). This option is typically DISABLED by default, as it can have a big impact on the system. If set, it is recommended that the "trickle" option be used, as this will perform a daily processing of active users, with all scanned over a period of one month.

Options include:

1. Disabled
2. Trickle Auto-Enroll All Active Users Over One Month Period
3. All Active Users Once Per Day
4. All Active Users Once Per Week
5. All Active Users Once Per Month

To choose and option:

1.Choose an option from the drop-down list next to the Offline Bulk Auto-Enroll field.



2.Click **Execute**.

3.A confirmation dialog box appears.

4.Click **OK**. The change is acknowledged.

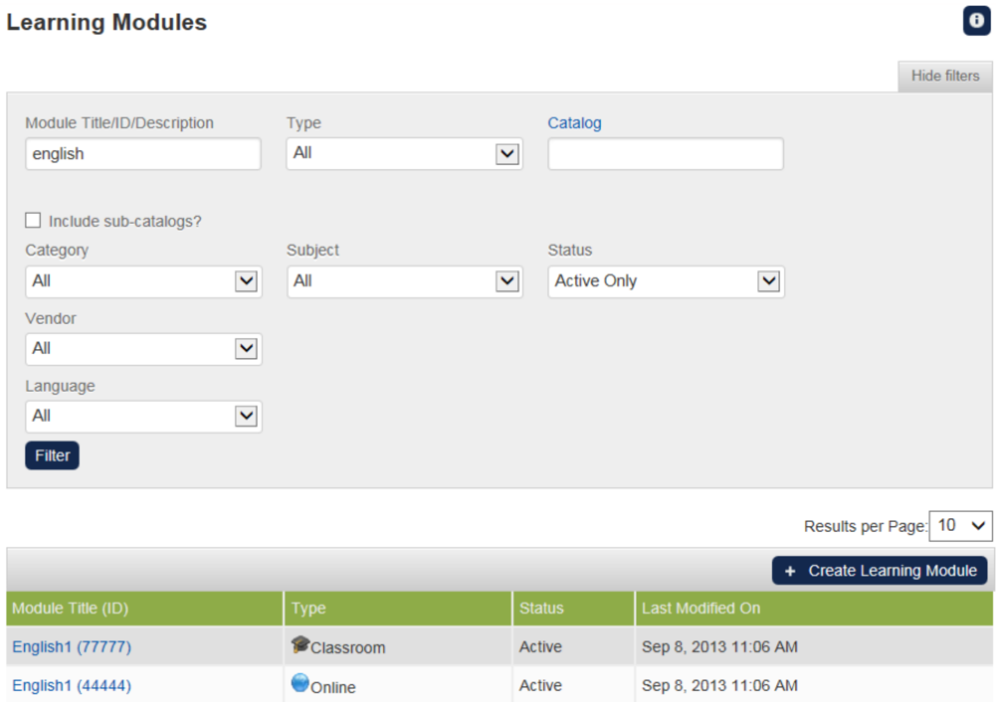
Bulk (Group) Enrollment

Note: As Bulk enrollment requires use of a pop-up window, it may be necessary to disable pop-up blocker functions before Bulk Enrollment can function.

If you want to enroll a pre-defined group of users, or multiple individual users into an online module, classroom or any learning object a user can enroll in, you may do so through the 'Group Enroll' function. (You could also automatically enroll users in specific classes, online modules, etc. using the Auto Enroll function.)

To enroll a pre-defined group of users, or multiple individual users:

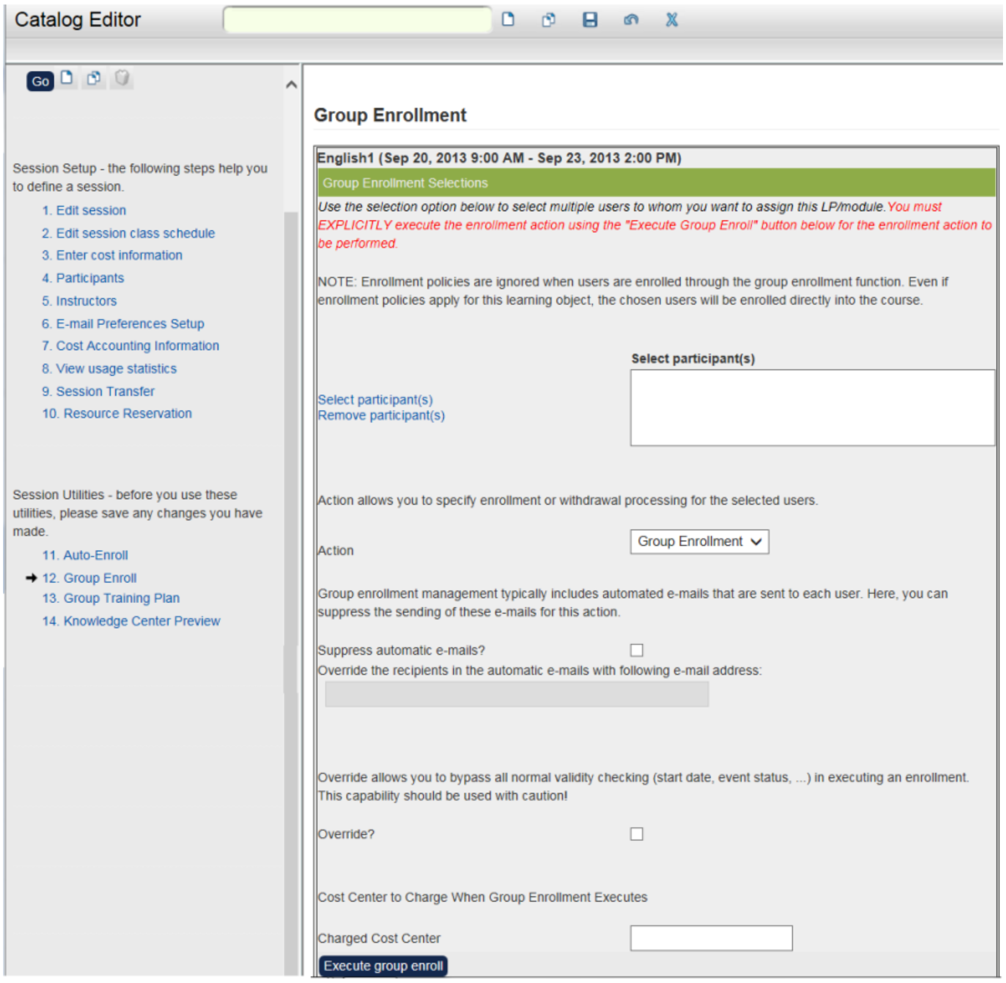
1.Access **Manage Center > Learning > Catalog General Settings > Learning Modules**.



2.Using the searching parameters, search for the course you want to configure.

3.Once the course is open, click the **Session Properties** tab on the left navigation pane of the screen.

4.Click **Group Enroll**.

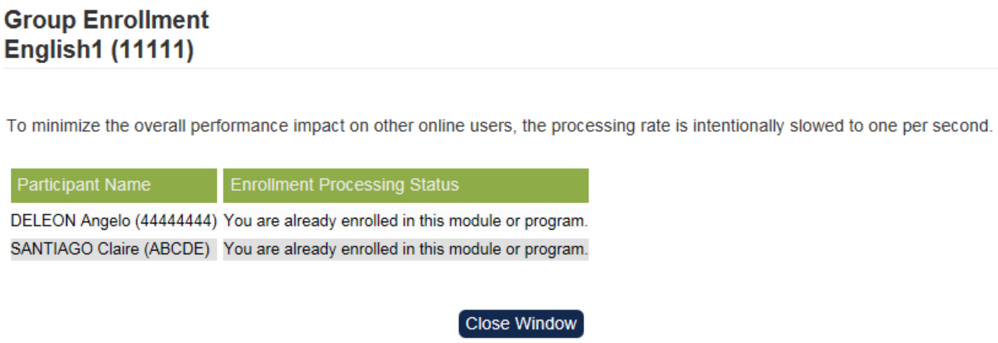


5.From here you may:

1. Select users you want to include in the group enrolment
2. Select **Group Enrollment** option in the Action in the dropdown button
3. Suppress automatic enrollment email to users
4. Override all normal validity checking
5. Change Cost Center

6.Click **Execute Group Enroll**. A pop-up screen will prompt you to verify that you wish to make a group enrollment.

7.Click **OK**.



The Talent Suite will then process your request. It will check individual users to ensure they comply with, among other things, course prerequisites and confirm users' enrollments in a separate screen.

8.Review the list of enrollments, and then click Close Window at the bottom of the screen.

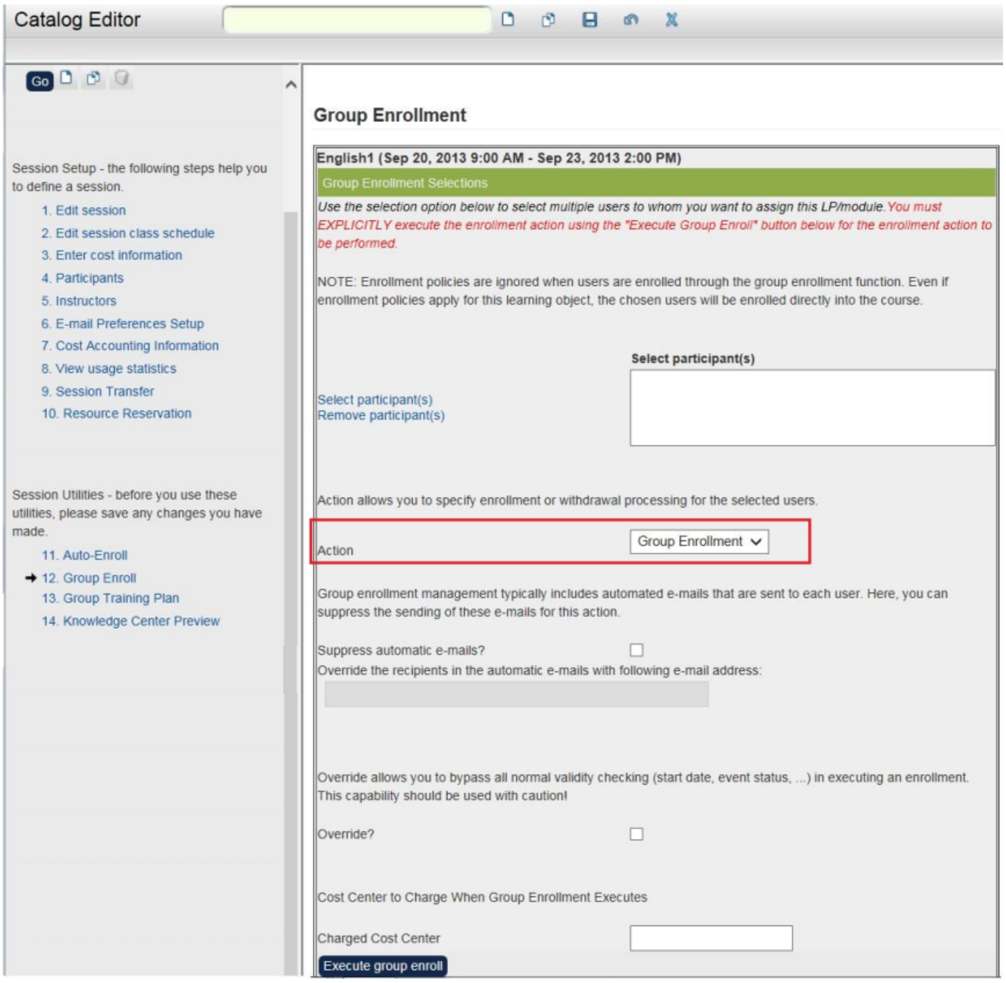
9.From here, you may check the enrollments for the course.

Enrollment or Withdrawal

(applies to NetDimensions Talent Suite)

To withdraw a group of users:

1.Click drop-down menu next to Action and select Group Withdrawal.



2.Click **Execute Group Enroll**.

Course Withdrawal Reason

(applies to NetDimensions Performance NetDimensions Learning)

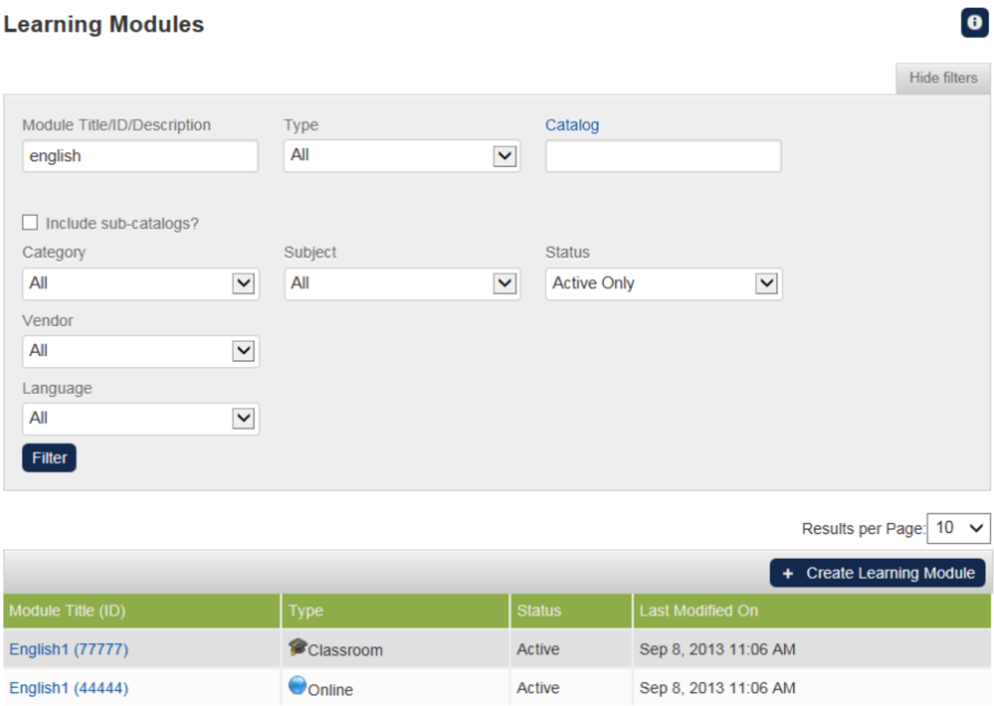
Sometimes, if a course is costly and an enrolled learner suddenly decides to withdraw from the course, it may be useful for the organizer to know the reason for the withdrawal. This new function is designed to allow such a reason to be captured during the withdrawal process. It is possible to capture the withdrawal reason for the case when the learner is already enrolled and also when the enrollment is awaiting approval.

Configurations

As the withdrawal reason is recorded against a learner's transcript record, it is important that in System Configuration, the option "Retain transcript records for student withdrawals" is enabled if this functionality is to be used.

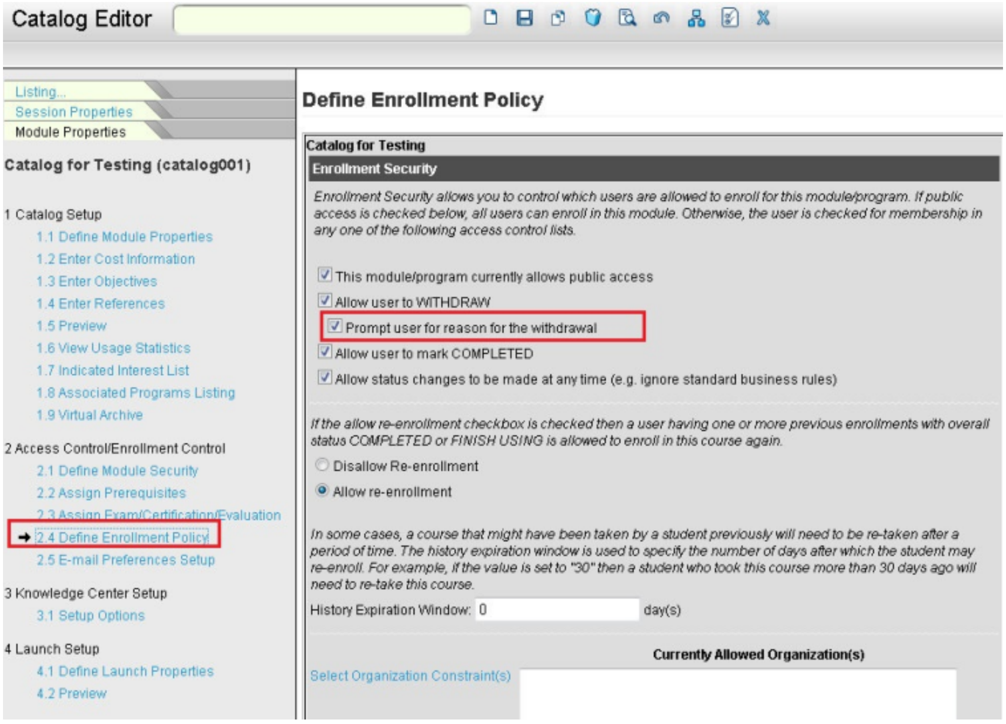
If you want the learner to be prompted for a withdrawal reason when withdrawing from an enrolled course:

1.Access **Manage Center > Learning > Catalog General Settings > Learning Modules**.



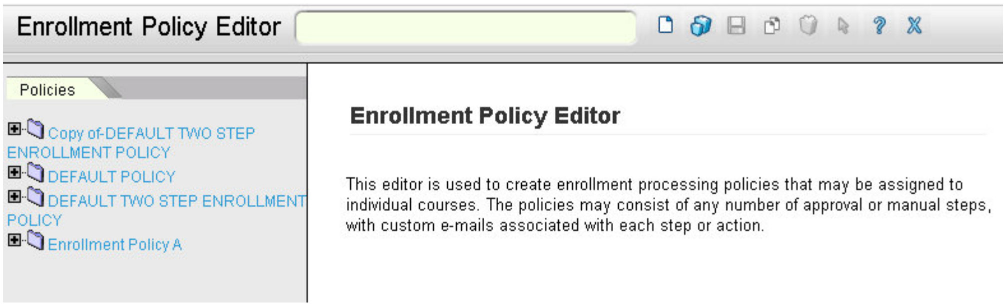
2.Select a Learning Object.

3.Under the Module Properties tab, click **Define Enrollment Policy**. Check the box beside the Prompt user for reason for withdrawal field.

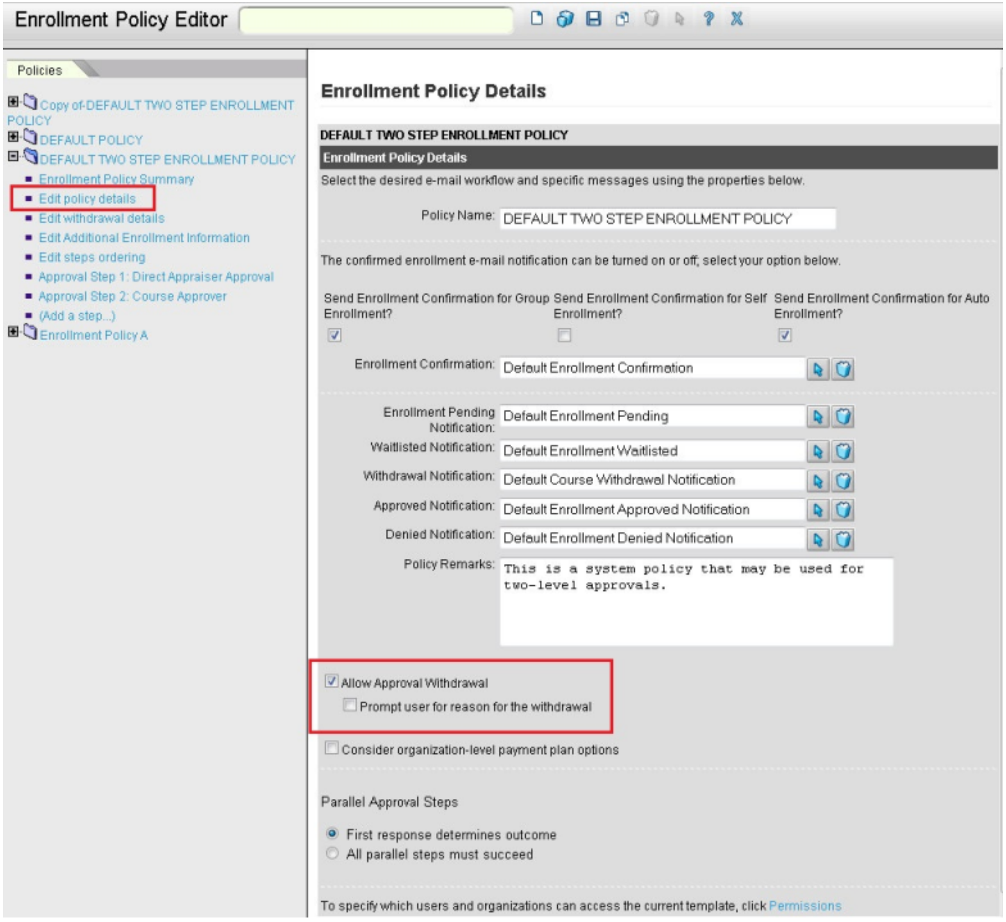


4.Additionally, for each enrollment policy, it can be configured for a learner to be prompted for a withdrawal reason when withdrawing from an enrollment awaiting approval.

5.Click **Manage Center > Learning > Enrollment Settings > Enrollment Policy Editor**. The Enrollment Policy Editor page appears.



6.Choose a folder under the Policies tab and click Edit policy details. The Enrollment Policy Details page appears.

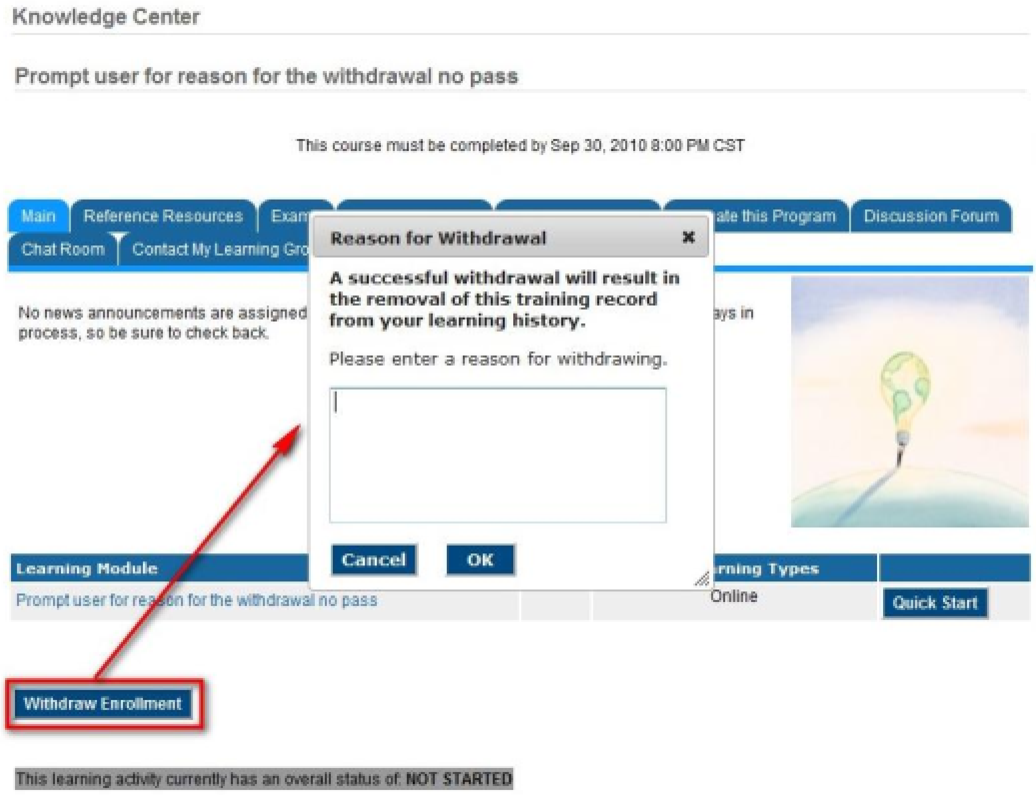


7.Check the **Prompt user for reason for the withdrawal** box.

8.Click **Save**.

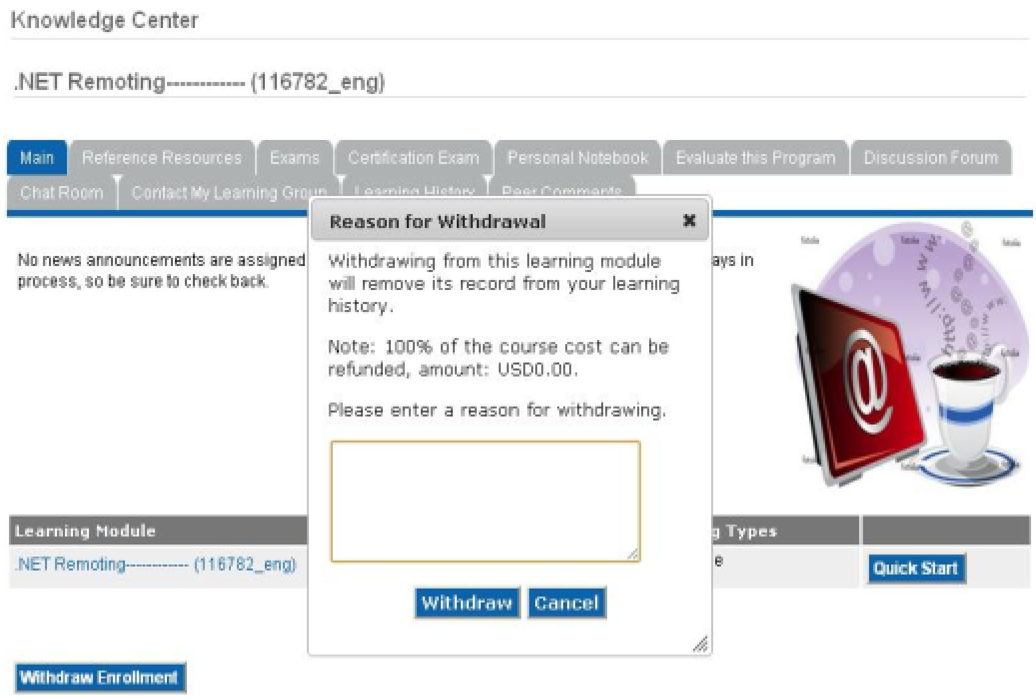
Reason for Withdrawal

When a learner withdraws from an enrollment, the Reason for Withdrawal dialog box will appear and ask the user to enter the reason for the withdrawal. The reason will be saved and the enrollment is withdrawn when the user clicks OK.



Withdrawals with Refund Amount

In the Knowledge Center, when a participant tries to withdraw from a course having cost information, a note is added to the confirmation dialogue to show the refund amount or tokens/credits.

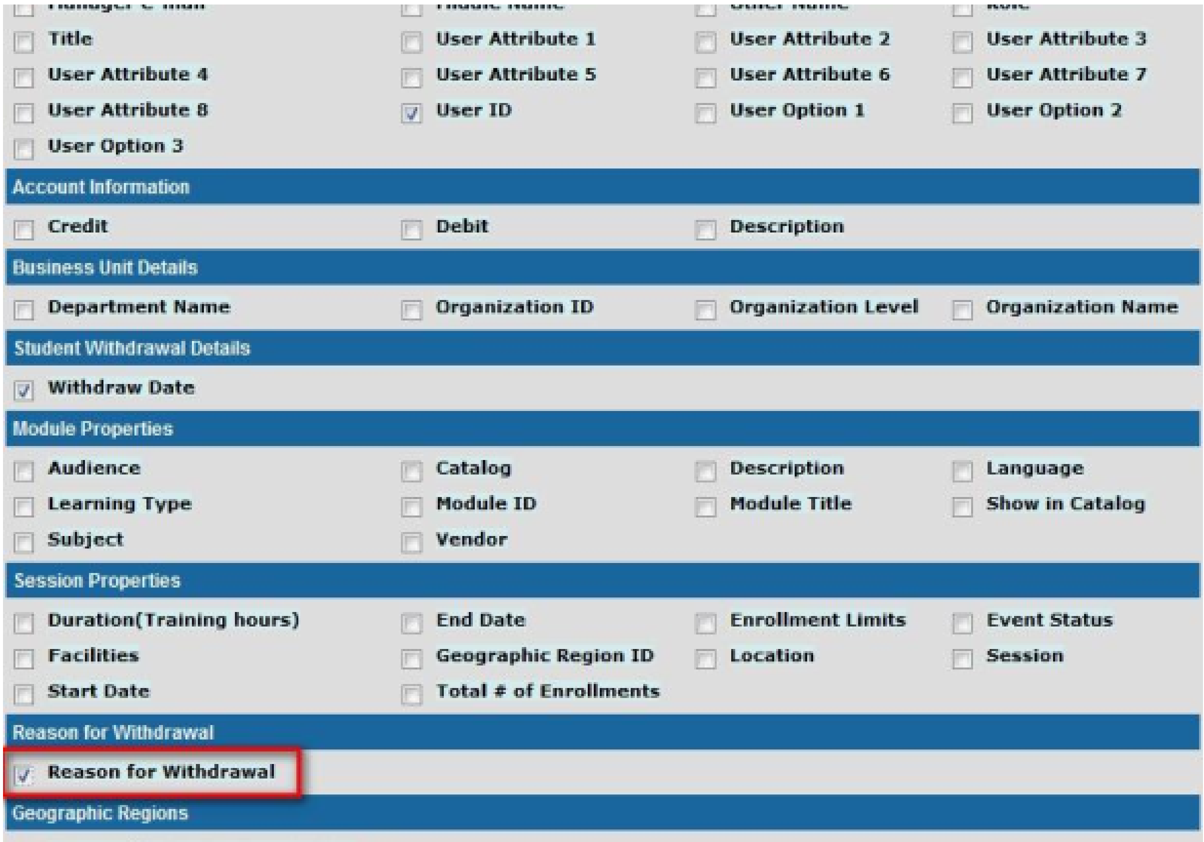


Withdrawals with Refund Amount

No note will be displayed if a participant withdraws from a course without cost information.

Report Wizard

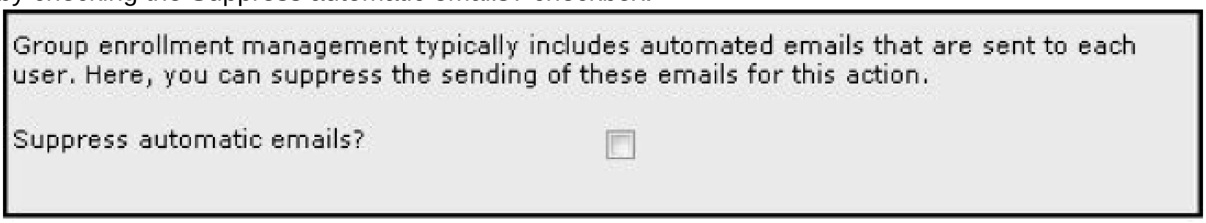
The withdrawal reason can be reported via the Report Wizard, in the report type "Withdrawn Student Details". A new column called "Reason for Withdrawal" can be selected:



Suppress Automatic Emails

(applies to NetDimensions Talent Suite)

If you do not wish to send automatic enrollment emails to each of the users in the group, you can do so by checking the Suppress automatic emails? checkbox.



Overriding Checks

(applies to NetDimensions Talent Suite)

Should you need to override system checks (this may be required, for example, when you need to enroll users in a course whose enrollment cutoff date has passed) click on the check box next to *Overri* *de?* before clicking Execute Group Enroll.

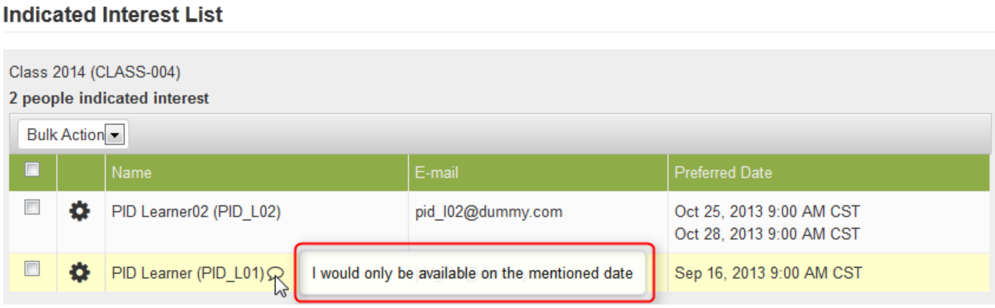
Note: As the Override functions allows you to bypass all normal validity checking (start date, event status, etc...) when executing an enrollment, this function should be used with great caution.

Group Enroll Indicated Interest Learners onto Sessions

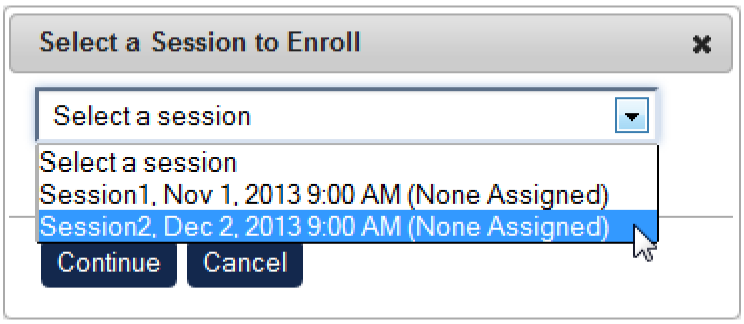
(applies to NetDimensions Talent Suite)

When module sessions have been set up based on learner preferred dates, catalog administrators can group enroll learners based on their preferences on the Indicated Interest List in Catalog Editor.

Catalog administrators can enroll learners who have indicated interest in a module



Catalog administrators will see learners' comments on mouseover of a chat bubble



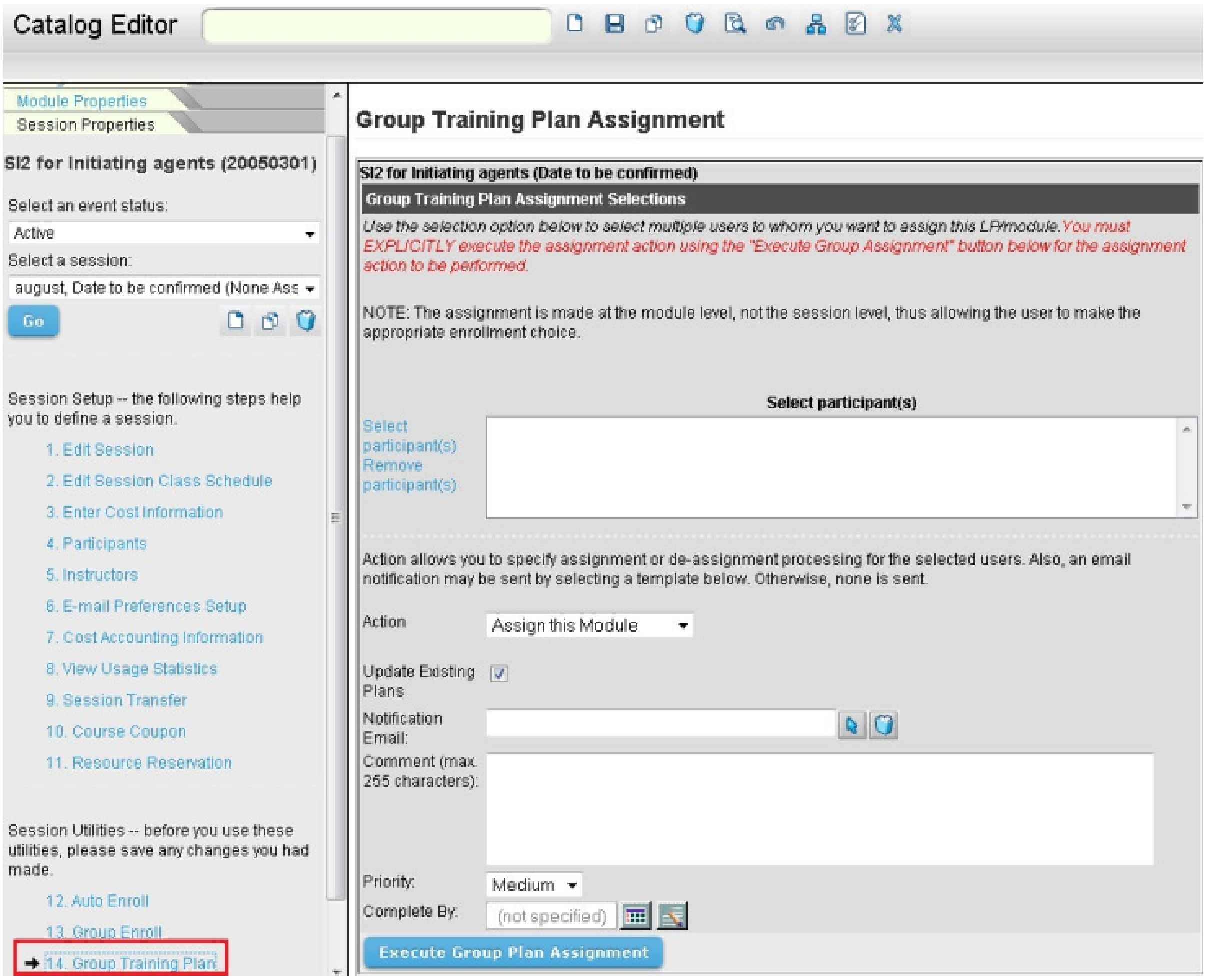
Target Session dialog for Catalog administrators to enroll learners from available sessions

Training Plan Group Assignment

(applies to NetDimensions Performance NetDimensions Learning NetDimensions eLearning)

This function allows administrators to push out Training Plan assignments to large groups of people at one time. A number of properties are included with this action to enable control over email, priorities, due dates, etc.

1. Access **Manage Center > Learning > Catalog General Settings > Catalog Editor**.
2. Click **Session Properties** on the left navigation pane.
3. Click **Group Training Plan**.



You can select participants and groups as described in Enroll Multiple Individual Users.
You can also choose to assign or remove the assignment of the module from theselected participants.
You can choose to notify the participants of the changes by selecting from one of the email templates. If you have any additional comment, you may enter it in the comment text box.
You can also let the participants know the priority and your expected completion dates of the module.
You must explicitly click Execute Group Plan Assignment for the plan to take effect.

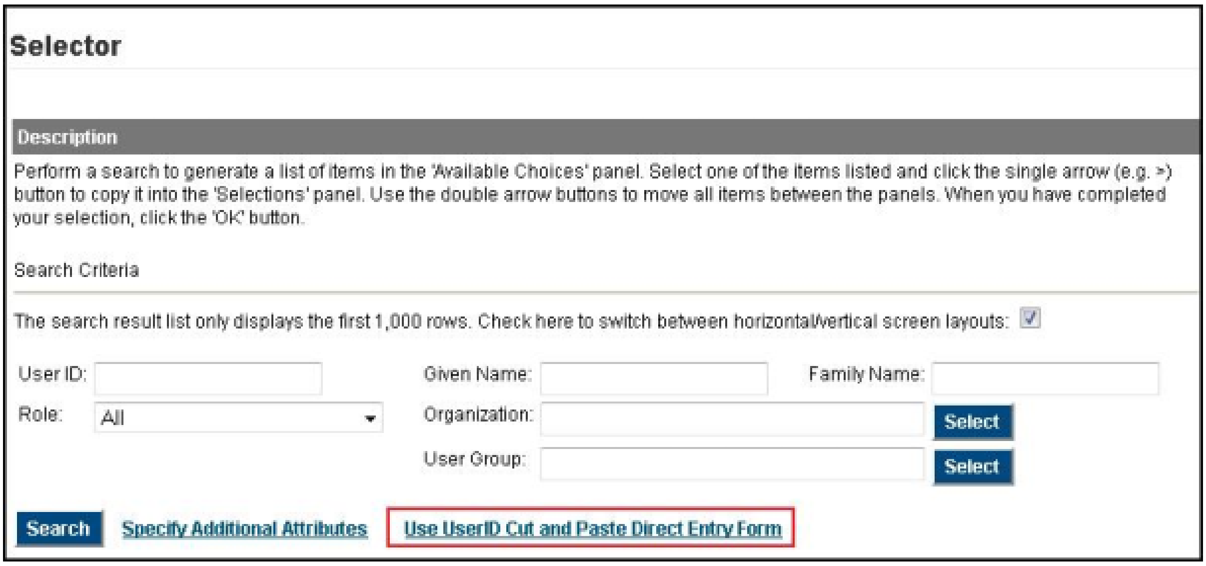
The participant can view the plan under the Career Development – Training Plan tab.

Select and Enroll Users Using an External List

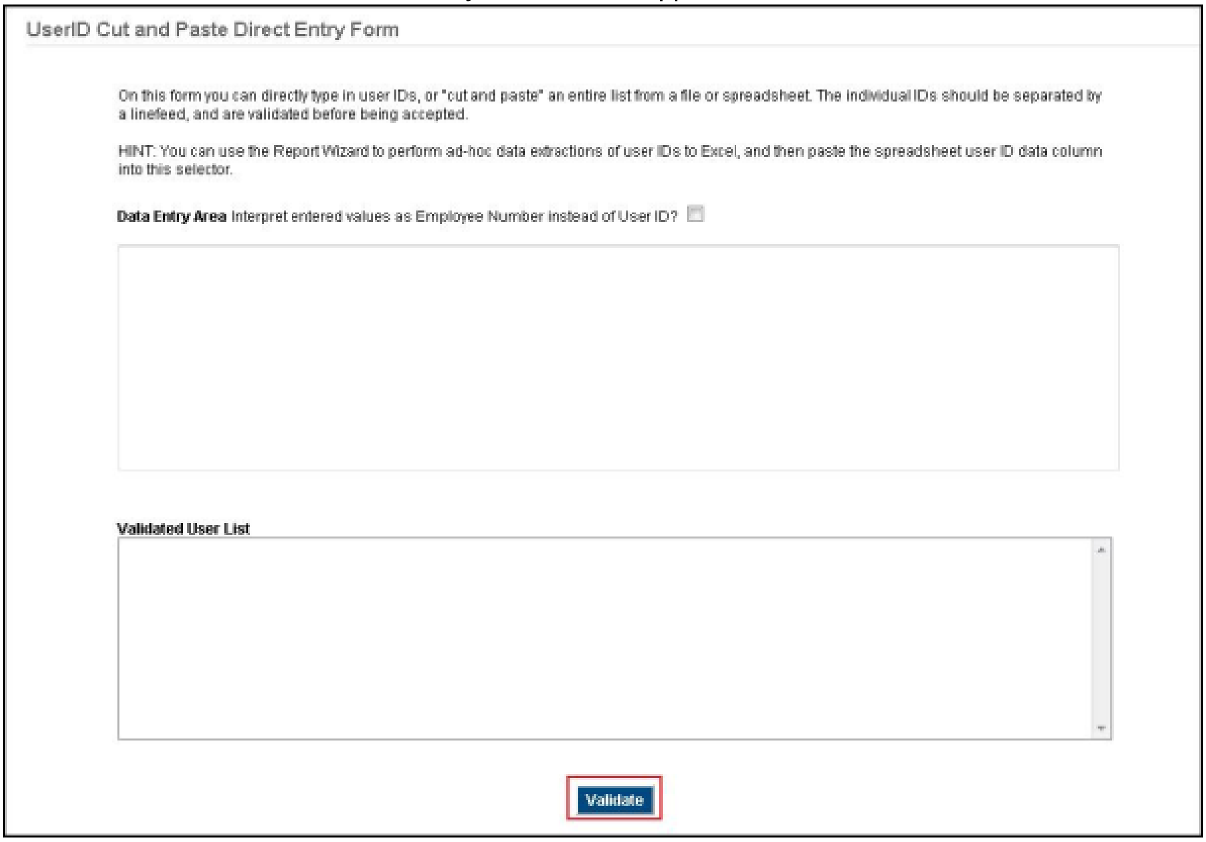
(applies to NetDimensions Talent Suite)

In choosing users for group enrollment, you also may cut and paste User IDs from an external source (e.g. an Excel file). To do so:

1.Click on Use UserID Cut and Paste Direct Entry Form.



2.The UserID Cut and Paste Direct Entry Form screen appears.



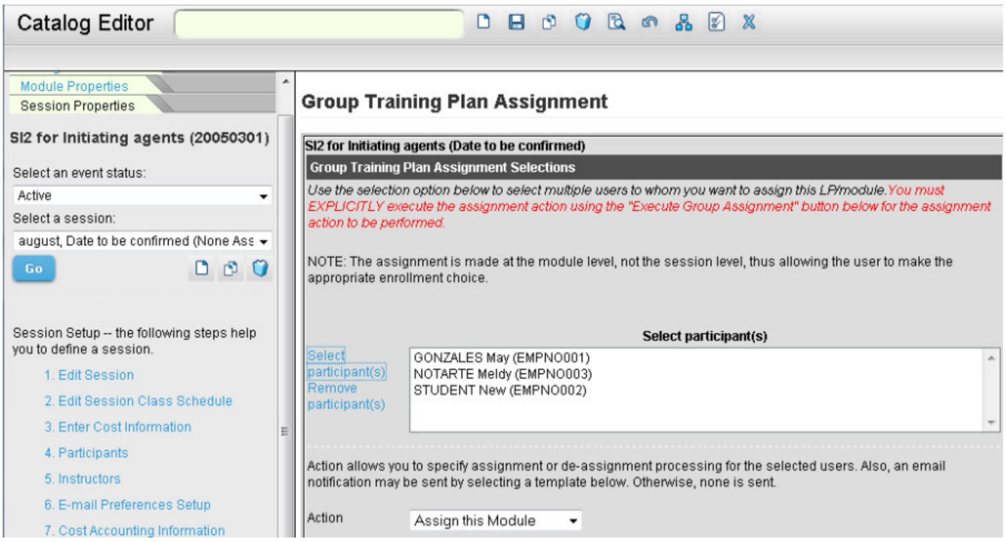
3.Save the desired list of User IDs in the clipboard.

4.Paste this list in the Data Entry area of the UserID Cut and Paste Direct Entry Form screen.

Tip: You can use the Report Wizard to perform ad-hoc data extractions of user IDs to Excel, and then paste the spreadsheet user ID data column into the Data Entry area.

5.Click **Validate**. If the user IDs are valid, the users' names and IDs will appear in Validated User List area.

6.Click **Save**. The chosen users' names will appear in the Select Participant(s) area of the Group Enrollment screen.



7.If you do not need to override any checks click Execute Group Enroll. A pop-up screen will prompt you to verify that you wish to make a group enrollment.

8.Click **OK**. The Talent Suite will then process your request. It will check individual users to ensure they comply with, among other things, course prerequisites and confirm users' enrollments in a separate screen.

9.Review the list of enrollments then click Close Window.

Organization-level Enrollment Policies

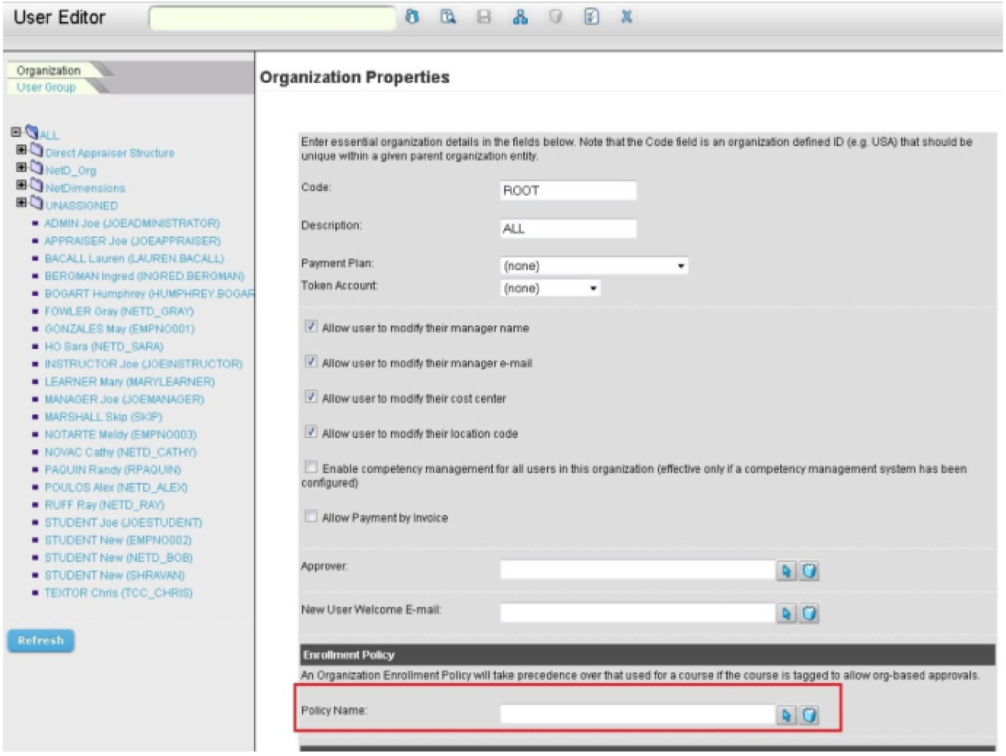
(applies to NetDimensions Performance NetDimensions Learning)

Organization-level Enrollment Policies enables approval workflow to be determined by a user's organization rather than requiring all organizations to use the same course-specific enrollment policy. Traditionally in the Talent Suite enrollment policies have been assigned to a course, and all users who self-enroll in that course have the same enrollment policy. With this feature, an enrollment policy can be assigned at the organization unit level and optionally marked in the course as taking precedence over the course policy.

Setup Step One

The first configuration action required is to define a policy to all organization units that need an org-based approach to approval workflow. Users typically have a hierarchy of org units, and the Talent Suite will traverse the hierarchy from the BOTTOM to the top, using the first org encountered as the users candidate org policy. For example, if a user is in org "NetDimensions/Sales/London" and NetDimensions has policy "A" configured and Sales has policy "B**"** configured, the Talent Suite will consider policy ""B" to be the applicable org policy for users in this org unit.

Now, the fact that a user has an applicable org-level policy does NOT mean that it will be used. This is where Setup Step Two comes into play.

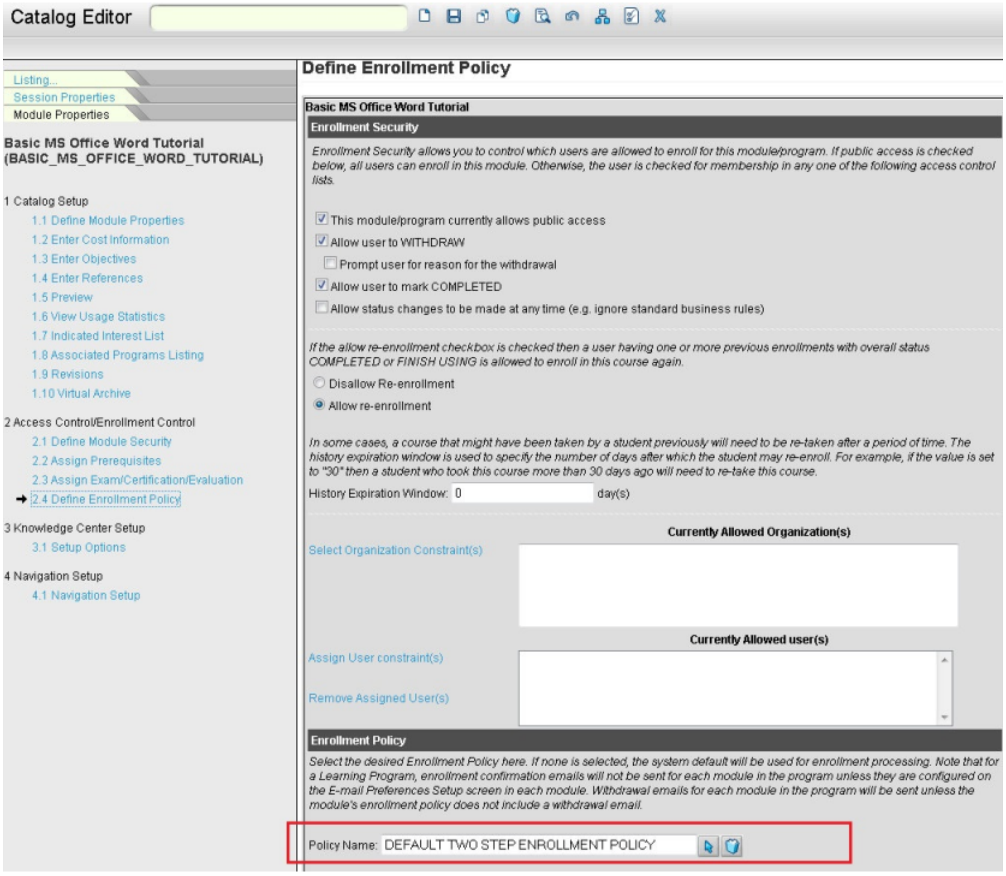


Setup Step Two

When a user attempts to enroll in a course, the system will determine if approvals are required based on the policy configured for the course (in Catalog Editor). There is now an additional checkbox on the Catalog Editor enrollment policy screen that allows an administrator to specify whether a user's org policy should take precedence over the course policy. So, at enrollment time this information is checked to determine which policy to use.

There are several important guidelines regarding the business logic of org enrollment policy processing:

1. The course must have a specific approval policy configured. The "DEFAULT POLICY" will not invoke approval processing as most courses are by default configured with this policy so as NOT to require approval processing.
2. If the user does not have an Organization policy configured or if the Organization policy is "DEFAULT POLICY" (i.e. the policy with the internal ID of **DEFAULT**), the course policy will be used during enrollment processing.



Examples

The following example of a user org hierarchy should help in understanding the business logic that is applied when traversing the org structure from the bottom-up for each user. Assume the org configuration is:

```
Level 1 - NetDimensions, Policy A
Level 2 - Sales, Policy B
Level 3 - Marketing, Policy DEFAULT POLICY
Level 4 - Hong Kong, No policy configured
```

When determining the effective org policy for a specific user, NetDimensions Talent Suite application treats DEFAULT POLICY the same as "no policy" and will ignore it and continue its scan. Thus, a user at each level would be assigned org policies as follows:

```
User at Level 1: Policy A
User at Level 2: Policy B
User at Level 3: Policy B (DEFAULT POLICY is ignored)
User at Level 4: Policy B (DEFAULT POLICY is ignored)
```

For the following enrollment examples, assume that the effective user Org Policy, Course Enrollment Policy, and Org Precedence Indicator are set as specified in each example. Also, assume that the DEFAULT POLICY is still configured as shipped, with no approval steps.

Enrollment Case 1

User: Policy: B
Course: Policy X
Org Precedence Indicator: True
Result: Policy B is used
Reason: B takes precedence over X

Enrollment Case 2
User: Policy: B
Course: Policy: DEFAULT POLICY
Org Precedence Indicator: True
Result: No approval processing is done, and the user is enrolled directly in the course. Reason: The course does not require approval processing when configured with DEFAULT POLICY.

Enrollment Case 3
User: Policy: B
Course: Policy: A
Org Precedence Indicator: False
Result: Policy A is used
Reason: Org policies have no effect for a course in which the precedence flag is unchecked.

Enrollment Case4
User: Policy: (none configured)
Course: Policy: A
Org Precedence Indicator: True
Result: Policy A is used
Reason: Because there is no org policy configured, the course policy is used. This is the case for all existing policy handling (before using Org Policies), and represents the most common approval logic case.

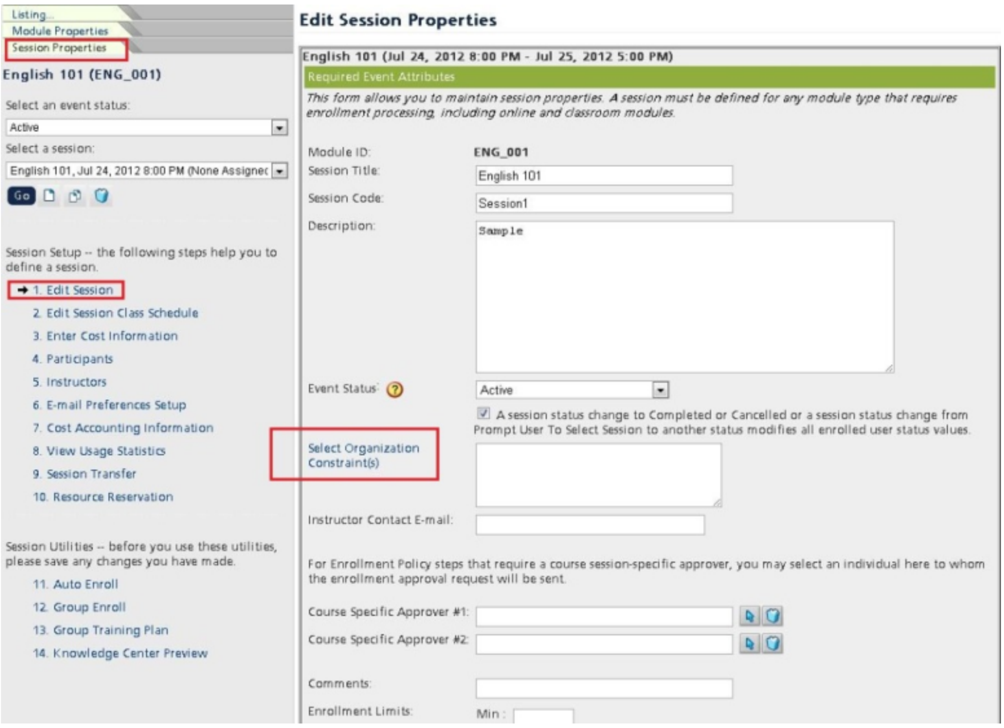
Enrollment Case 5
User: Policy: DEFAULT POLICY (some explicitly configured the DEFAULT POLICY for the org unit instead of leaving it blank).
Course: Policy: A
Org Precedence Indicator:True
Result: Policy A is used
Reason: The DEFAULT POLICY is treated the same as "no policy".

Organizational Constraints for Module Sessions

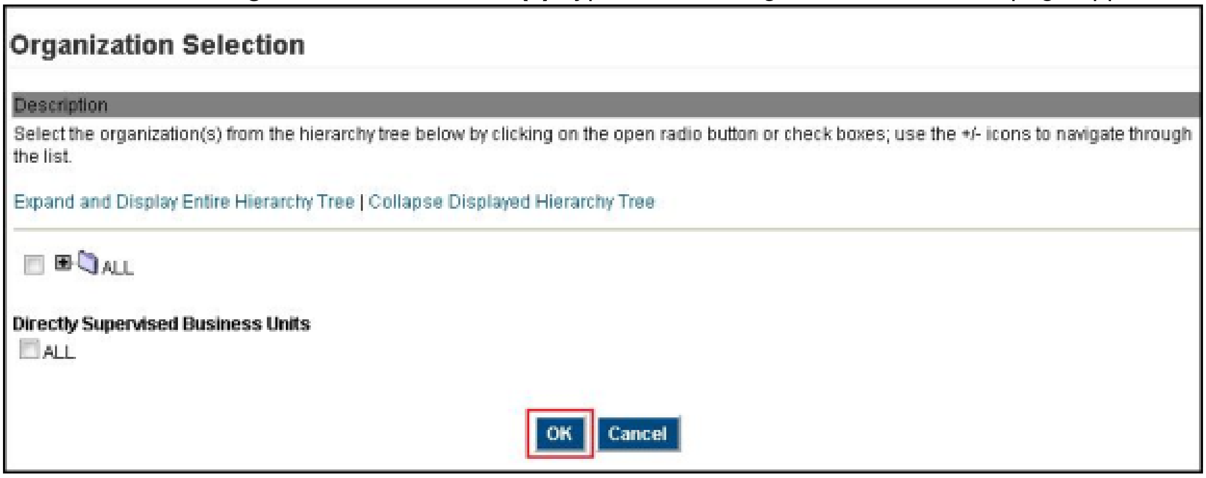
(applies to NetDimensions Talent Suite)

In cases where a course has sessions where each session is exclusively for one or more organization units, it is useful to configure and display general course information to all users while restricting the display of individual sessions to the relevant organization units. To do so:

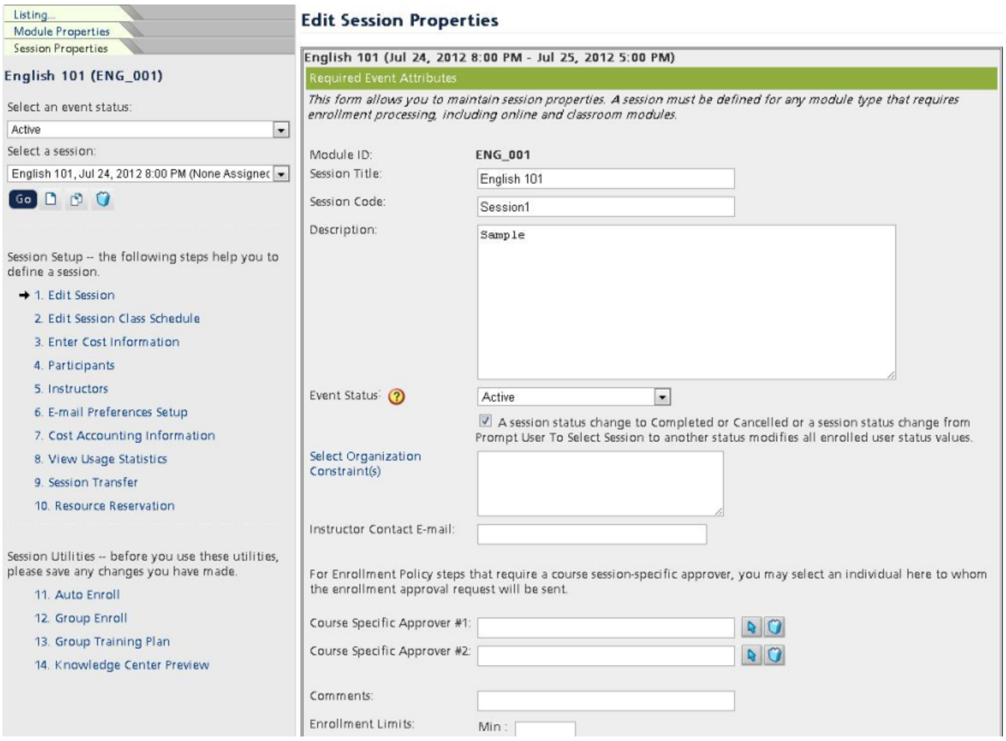
1.Click **Edit Session** under **the Session Properties** tab.



2.Click the **Select Organization Constraint(s)** hyperlink. The *Organization Selection* page appears.



3.Make your selection and click **OK**. The selection appears.

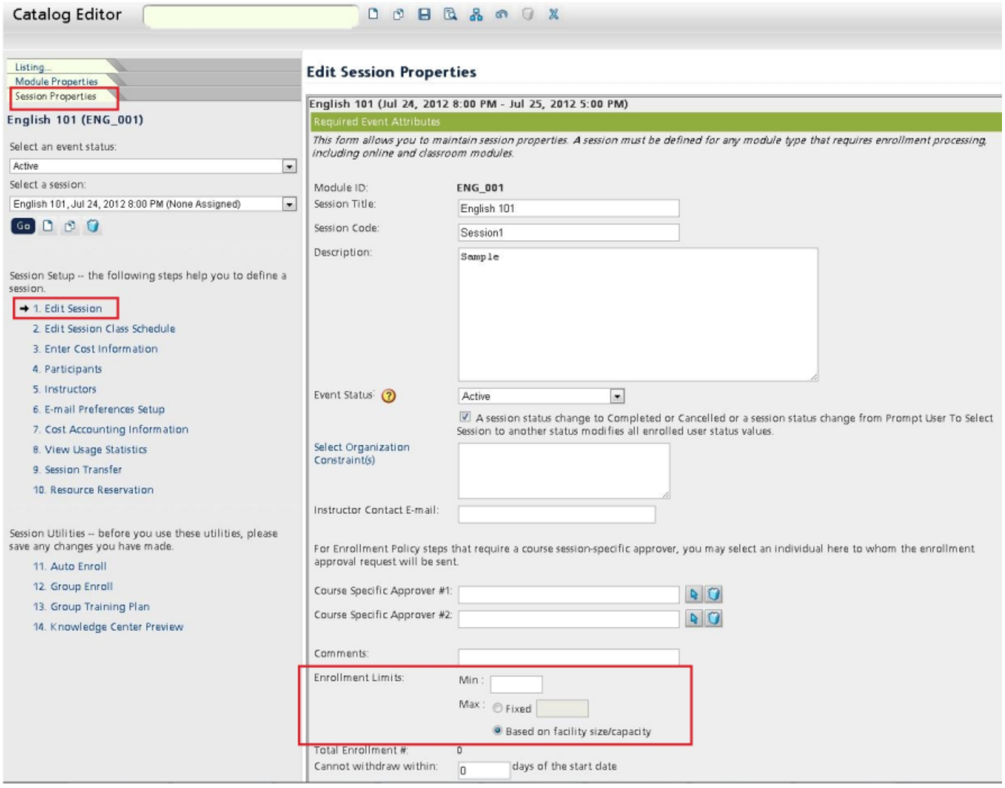


1. No organizations configured for the organization constraints makes the session visible to all organizations.
2. Organization constraints apply only to module sessions and not program sessions therefore it is possible for users who are not members of the specified organizations to enroll onto the restricted session if it is part of a program.

1. Minimum Course Size Usage

(applies to NetDimensions Performance NetDimensions Learning)

To improve usability and reduce confusion, the session enrollment minimum limit field has been moved from the E-mail Preferences Setup page to the Edit Session Properties screen within the Catalog Editor.



The "Session waiting reminder" notification email, which depends on the minimum class size setting, will now use the above setting.

Enrollment Maximum Limit

(applies to NetDimensions Performance NetDimensions Learning)

Allow Enrollment Limit to be Based on Facility Room Size

Certain learning types, e.g. Classroom, allow class sessions to be set-up, with each class session located at a physical location (or facility).
Currently NetDimensions Performance application allows a session to have either no seat limit or a limit with a fixed value. This limit has no relation to the number of seats available at the session's facility.

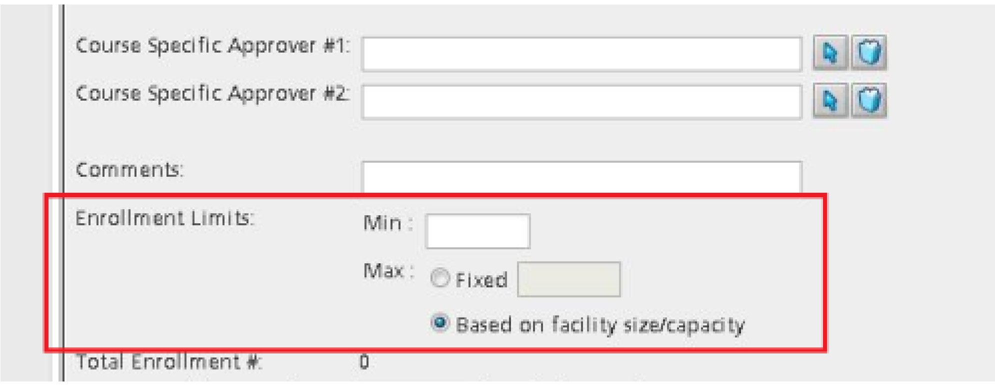
In the situation where a facility begins to host more than one classroom course at the same time, it becomes useful to take the location's seat capacity into account when determining the maximum enrollment limit because different groups of learners need to share the same set of seats. Moreover, a course withdrawal for one course could trigger the auto-enrollment of a wait-listed learner in a different course.

This enhancement is designed to deal with this complex situation.

Setting

For a session of a course that can have a physical location associated with it, the Enrollment Maximum Limit can now take one of two values:

1. Fixed - this offers the previous fixed limit behaviour; setting it to zero or leaving it blank means there is no maximum limit.
2. Based on facility size/capacity - this is a new option that uses the associated class facility's maximum number of seats as the maximum limit. The enrollment limit also takes into consideration other enrollments that might have taken place for some other courses using the same facility at the same time. For brevity, we can refer to the session as having a "dynamic" enrollment limit. If a facility's maximum number of seats is set to zero, this is interpreted as not having any limit.



Seats Remaining Calculation Logic

Suppose a course session is using the dynamic enrollment limit and all its separate classes are held at one facility. If there are other sessions sharing the same facility at the same time, the seats remaining for this session can be described by the following formula:

```
remaining seats = facility capacity - max { total no. of enrollments in a
particular period of all the sessions' class schedules }
```

However, if the course session's classes are held in different facilities, then the calculation becomes:

```
remaining seats = min {
facility capacity - max { total no. of enrollments in a particular period
of the sessions' class schedules }
} of all facilities involved in the session
```

Scenario A

Facility F1 has only 3 seats.
Sessions S1, S2 and S3 have classes all located at F1 on the same day, with their schedules overlapping. Suppose that each session has 1 learner enrolled.

The following diagrams show the classes' start and end times and how they overlap.

Example 1:
S1 (10:00-11:30) -------------------------
S2 (09:00-11:00) -------------------------
S3 (10:45-12:00) -------------------------

In this example, since there is a period in time when all 3 classes are in the same facility, all 3 seats in the facility have effectively been used up and no more enrollment can be accepted for any of the 3 sessions.

Example 2:
S1 (10:00-11:30) -------------------------
S2 (09:00-11:00) -------------------------
S3 (11:15-12:30) -----------------------

In this example, at any point in time, there is at most 2 learners in the facility, therefore, the number of seats which remain available for enrollment is 1.

Scenario B

Let's consider the more complicated scenario where one session has 2 classes held at different facilities.
Facility F1 has 3 seats. Facility F2 also has 3 seats.
Sessions S1, S2 and S3 each has a class located at F1 on Day 1, with their schedules overlapping.
Suppose that each session has 1 learner enrolled.
Session S1 has an additional class located at F2 on Day 2.
The following diagrams show the classes' start and end times and how they overlap.
Example 1:
At facility F1 on Day 1,
S1 (10:00-11:30) -------------------------
S2 (09:00-11:00) -------------------------
S3 (11:15-12:30) ------------------------

At facility F2 on Day 2,
S1 (10:00-11:30) -------------------------
In order to work out the number of seats remaining for enrollment for session S1, we need to consider the seats remaining for each of its classes and take the minimum value. For the class held at F1, the seats remaining is 1 (as explained in Scenario A's second example); for the class held at F2, the seats remaining is 2. Therefore the seats remaining for enrollment for session S1 is 1.

Scenario C

Facility F1 has 3 seats.
Sessions S1, S2 and S3 have classes located at F1 on Day 1, with their schedules overlapping.
Suppose each session has 1 learner enrolled.
In addition, S1 has another class located at F1 on Day 2, same as for another session S4 which has 2 learners enrolled.
At facility F1 on Day 1,
S1 (10:00-11:30) -------------------------
S2 (09:00-11:00) -------------------------
S3 (11:15-12:30) ------------------------
At facility F1 on Day 2,
S1 (10:00-11:30) -----------------------
S4 (09:00-11:00) =========================
In this example, since no more enrollment is possible for S1 on Day 2, it is not possible to enroll another learner for S1 even though a seat is available on Day 1.
Note that the timezone set at the session level is taken into consideration when working out class schedule overlap. It must be ensured that this is set appropriately for the facility in question.

Consequences

This enhancement affects the following places:

1. The available number of seats for enrollment, as displayed in NetDimensions Performance application or retrieved via the API.
2. The enrollment process
3. Wait-list handling: in the example provided in Scenario C, if wait-listing is enabled with automatic upgrade, and one of the enrolled learners decides to withdraw from session S4, then it is possible for a wait-listed learner of either S1 or S4 to become enrolled. The order of the upgrade depends on who joined the wait-list first.

Wait-list Upgrade

Here is a more complicated scenario involving wait-list upgrade.
Facility F1 has 5 seats.
Session SA has a fixed enrollment limit of 2 while session SB has a dynamic enrollment limit.
Their classes are both located at F1 at the same time and both sessions have the wait-list option set to "Automatic Upgrade&quot". Suppose 2 learners are enrolled in session SA and 3 learners are enrolled in session SB. Further enrollment attempts will result in learners being wait-listed.
The following examples show how the order in which learners are wait-listed can affect the auto-upgrade result.

Example 1:
Learner B attempts to enroll onto session SB and is wait-listed.
Learner A attempts to enroll onto session SA and is wait-listed.
Now if a learner withdraws from session SA, both learners A and B will be upgraded and become enrolled onto sessions SA and SB respectively. This is because the upgrade logic considers all wait-listed users in both sessions SA and SB since they are located at F1:

As learner B is wait-listed before learner A, he is considered first with session SB's dynamic enrollment limit in mind. A spare seat at the facility F1 means learner B can become enrolled.
Now learner A is considered using the fixed enrollment limit of 2. After the withdrawal, there is only 1 learner in session SA so learner A is upgraded.

Example 2:
Learner A attempts to enroll onto session SA and is wait-listed.
Learner B attempts to enroll onto session SB and is wait-listed.
In this situation, if a learner withdraws from session SA, only learner A is upgraded:
As learner A is wait-listed before learner B, he is considered first with session SA's fixed enrollment limit in mind. After the withdrawal, there is only 1 learner in session SA so learner A is upgraded.
Now learner B is considered using the dynamic enrollment limit in mind. After the enrollment of learner A, the facility is full again so learner B remains wait-listed.
However, if instead, a learner withdraws from session SB, only learner B is upgraded:
As learner A is wait-listed before learner B, he is considered first with session SA's fixed enrollment limit in mind. As there are still 2 learners in session SA, learner A remains wait-listed.
Now learner B is considered using the dynamic enrollment limit in mind. A spare seat at the facility F1 means learner B can become enrolled.

Assumptions and Limitations

a. A course session's classes should not overlap in time.
b. A user should not enroll onto 2 sessions with clashing schedules. When summing up the total number of enrollments at a particular time, we take the number from each session separately, so it will count double on seat usage if the same user is enrolled onto 2 sessions with clashing schedules. In practice, a user should not be able to attend 2 sessions at the same time, even if they are at the same facility.
c. Wait-list upgrade is not automatically invoked after the maximum number of seats for a facility is increased. It is expected that this value will not frequently change.

Technical Issues

For the modules contained in the Learning Program:

1. If the module is completed or finished using, then its status will not change.
2. If the enrollment is shared, then status will also not change.
3. If the module is a Learning Object, and it is incomplete, then it is set as finished using.
4. For other cases, the module is withdrawn.

For the Learning Program:

1. If the Learning Program is completed or finished using, then its status will not change.
2. Otherwise, the Learning Program's status is set to withdrawn.

Enrollment Withdrawal Handling

Withdrawal Record Logic

The default behavior when a user withdraws from an enrolled course is to record an entry in the table "withdrawnUsers" table and to remove all standard records related to the enrollment itself. Several important points about this logic include the following:

1. The withdrawal record is for the object in which the user was directly enrolled. This means:

   1. Individual module sessions in which the user was directly enrolled;
   2. The Learning Program (but not the individual modules within the program);

Users who are "waitlisted" or "pending approval" do NOT have a withdrawal record created, as they are not yet considered enrolled.

2. The overall withdrawal logic is the same no matter where it is invoked, including user withdrawals via the KnowledgeCenter, and administrator status changes in the Catalog Editor Participants tab.

The one exception is the Group Withdrawal function with the Override indicator set. This Catalog Editor function is intended to remove all traces of an enrollment, and so will not record the individual withdraw records for each user when the override flag is checked.

3. A new System Configuration option entitled "Record All LP Module Withdrawals" has been added to recent releases of NetDimensions 4.6 and later in which we now allow administrators to change the above business logic so that the following happens:

All modules within a Learning Program also have withdrawal records recorded. The default, as mentioned above, is to only record the LP withdrawal and not the individual LP module withdrawals.

Bulk Enrollment and Enrollment Policies

Is the enrollment policy enforced when a bulk enrollment is made?

No. As only a person with Administrator privileges is able to make bulk enrollments, and it is assumed that Administrator are aware of enrollment restrictions, enrollment policy checks are bypassed during the processing of bulk enrollments.

Certification Manager

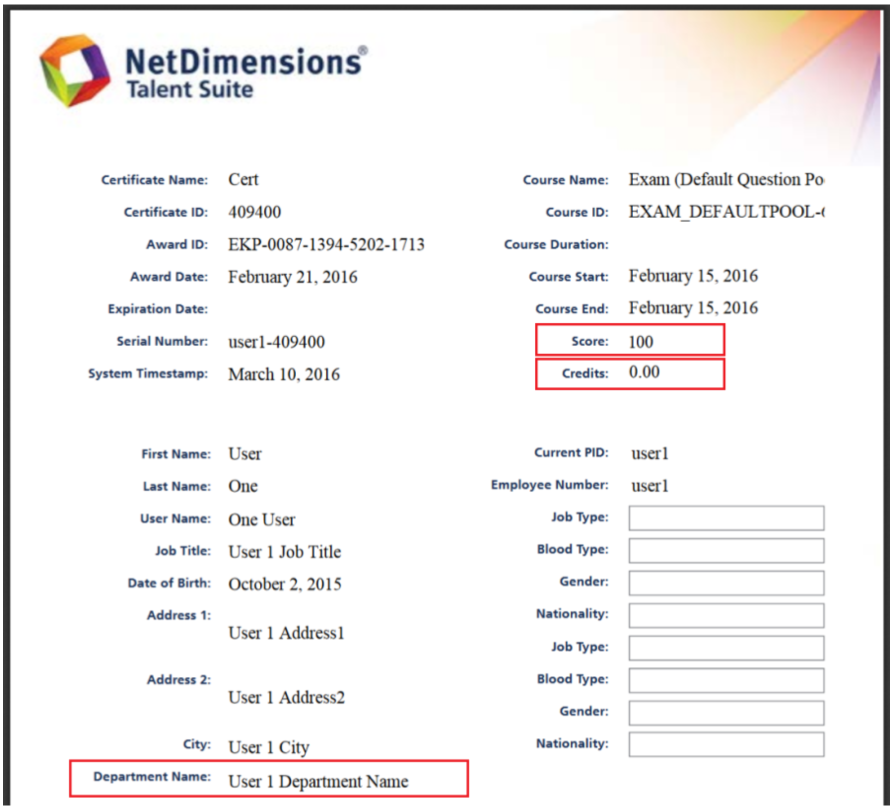
Certification award information, including the pdf file, is captured at the time of award. This information can be used to populate Certificate PDF fields using the following keys:

Object	Field	Key
Certificate	Certificate ID	CertificateId
Certificate	Certification Code	CertificateCode
Certificate	Certification Name	CertificateName
Certificate	Award ID	AwardId
Certificate	Award Date	AwardDate
Certificate	Expiration Date	ExpirationDate
Certificate	Serial Number	SerialNumber
Certificate	System Timestamp	SystemTimestamp
Course	Course ID	CourseId
Course	Course Name	CourseName
Course	Duration Comments	CourseDuration
Course	Course start date	CourseStart
Course	Course end date	CourseEnd
Course	Objectives	Objective1,...,ObjectiveX
Course	Module Description	ModuleDescription
Course	Session Title	SessionTitle
Course	Facility Code	FacilityCode
Course	All Module Attributes	AllModuleAttrs
Course	Performance Grade	PerformanceGrade
Course	Score	FinalScore
Course	Credits	TrainingCredits
Learner	User Name	UserName

Learner	User Name (First Name then Last Name)	UserFirstLastName
Learner	First Name	UserFirstName
Learner	Last Name	UserLastName
Learner	User ID	CurrentPid
Learner	Employee Number	EmployeeNumber
Learner	Job Title	JobTitle
Learner	User Attributes	UserAttr1,...,UserAttr8
Learner	Date of Birth	DateOfBirth
Learner	Address 1	Address1
Learner	Address 2	Address2
Learner	City	City
Learner	Department Name	DepartmentName
Instructor	Instructor Name	Instructor1Name,...,InstructorXName
Instructor	Instructor Job Title	Instructor1JobTitle,...,InstructorXJobTitle
Instructor	Instructor Department Name	Instructor1DepartmentName,...,InstructorXDepartmentName
Instructor's Direct Appraiser	Instructor's Direct Appraiser Name	Instructor1DaName,...,InstructorXDaName
Instructor's Direct Appraiser	Instructor's Direct Appraiser Job Title	Instructor1DaJobTitle,...,InstructorXDaJobTitle
Instructor's Direct Appraiser	Instructor's Direct Appraiser Department Name	Instructor1DaDepartmentName,...,InstructorXDaDepartmentName
Task Approver	Approver Name	ApproverName

Individual Dynamic Attributes can also be used to populate the Certificate PDF Fields by using the following keys:

1. For module attributes, "ModuleAttr-AC" where "AC" should be replaced by the respective attribute's code
2. For User Attributes, "UserAttr-UA" where "UA" should be replaced by the respective attribute's name



NetDimensions® Talent Suite

Certificate Name:	Cert	Course Name:	Exam (Default Question Po
Certificate ID:	409400	Course ID:	EXAM_DEFAULTPOOL-(
Award ID:	EKP-0087-1394-5202-1713	Course Duration:	
Award Date:	February 21, 2016	Course Start:	February 15, 2016
Expiration Date:		Course End:	February 15, 2016
Serial Number:	user1-409400	Score:	100
System Timestamp:	March 10, 2016	Credits:	0.00
First Name:	User	Current PID:	user1
Last Name:	One	Employee Number:	user1
User Name:	One User	Job Type:	
Job Title:	User 1 Job Title	Blood Type:	
Date of Birth:	October 2, 2015	Gender:	
Address 1:	User 1 Address1	Nationality:	
		Job Type:	
Address 2:	User 1 Address2	Blood Type:	
		Gender:	
City:	User 1 City	Nationality:	
Department Name:	User 1 Department Name		

Change URL Link

If all Enrollment Approval Request emails generated by the Talent Suite have the wrong URL link in the email:
The link for approval within the email is set in the ekp.properties file and is initially configured to begin with "http://localhost:8080/nts/servlet/nts". This can be changed as follows:

1. Open the ekp.properties file (found under "WEBINF/conf folder") in a text editor.
2. Search for the key word "system.baseurl".
3. Update the value from "http://localhost:8080/nts/servlet/nts" to the correct URL with your server name.
4. Save the file and then restart the Talent Suite.