



NetDimensions LMS

15.1

User Administration

An overview of User Administration features in
PeopleFluent Learning NetDimensions LMS Version 15.1

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Introduction

This guide focuses on the functions under "Users" in the Manage Area. The functions include:

- User Editor functions to search for users, change organizations or create new users
- Logically Deleted Users
- User Attribute Configuration
- CSV Data Loaders
- Switching User
- User ID migration to move a user's records from one User ID to another
- Role Management
- Groups and Organization Management
- Setting Permissions

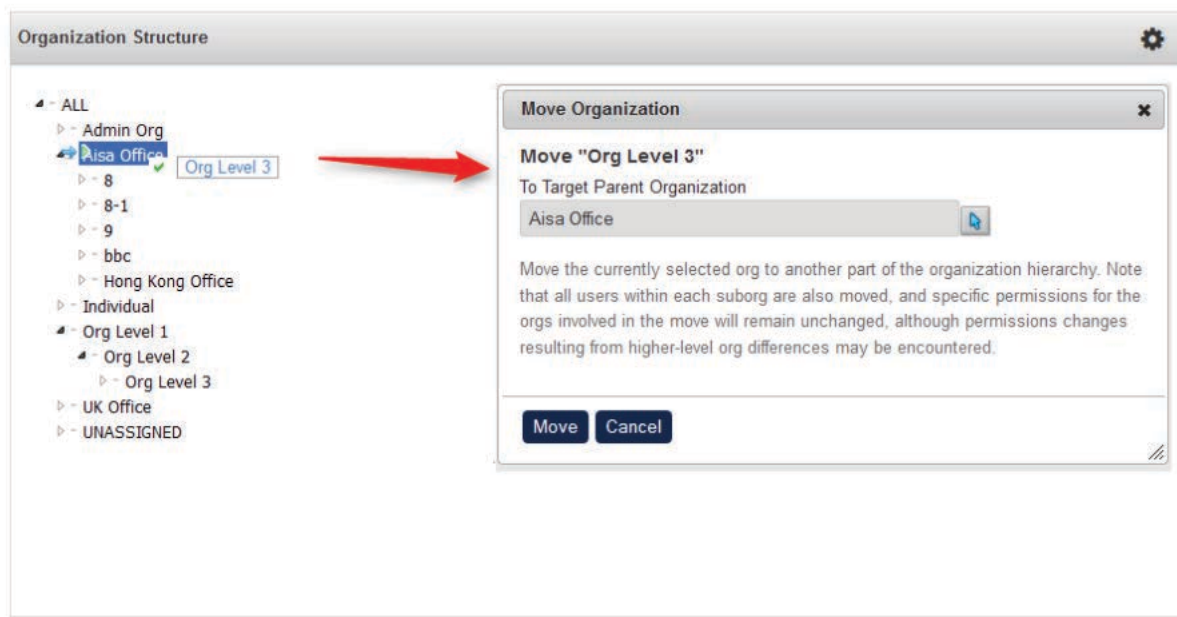
Organization Maintenance

"Organization Maintenance" is available under Manage Center > Users > Group and Organisation. Right-clicking on an organization node reveals a context menu allowing Add, Edit, Move, and Delete actions:

The screenshot displays the 'Organization Maintenance' interface in the PeopleFluent system. The top navigation bar includes 'Manage Center' and tabs for Overview, Learning, Talent, Communicate, Users, Reports, and System. The 'Users' tab is selected. The main header is 'Organization Maintenance'. Below the header are filter fields for Organization Name, Organization Level, ORG Location, Type of ORG, and Org Structure. A 'Filter' button is present. The main content area shows a tree view of organization levels. A right-click context menu is open over the '_Lv-6-10-1' node, showing options: 'Add Organization as Child', 'Edit', 'Move', and 'Delete'. The bottom section contains 'Tips and Tools' with instructions on dragging and dropping nodes and using the right-click menu.

You can also drag and drop nodes to move organizations:

Organization Maintenance



Editing Organizations

You can set the organization properties when adding or editing an Organization:

The screenshot shows the 'Edit Organization' page for 'UK Office' in the NetDimensions Talent Suite Manage Center. The page is divided into several sections:

- General Properties:**
 - Logical Domain: Global Default
 - Organization Code*: ukDomainOrg
 - Organization Name*: UK Office
- Organization Member Permissions:**
 - Allow members to edit:**
 - ☒ Manager Name
 - ☒ Manager E-mail
 - ☒ Cost Center
 - ☒ Location Code
 - ☐ Enable external competency management (The competency management system must have been configured)
 - When reviewing transcripts of a learner in this organization:**
 - ☒ Inherit the following parent settings:
 - Reviewers in general should see Details, Overall Progress, Individual SCO Progress, and Course Interactions
 - The Direct Appraiser of the learner should see Details, Overall Progress, Individual SCO Progress, and Course Interactions
 - ☐ Reviewers in general should see: Completion Status Only
 - The Direct Appraiser of the learner should see: Completion Status Only
 - Note: Course Instructors are always granted access to Details, Progress, and Course Interactions when reviewing transcripts
- Enrollment & Payment**
- Report Distribution**
- Member Management & Notification Settings**
- Home Page Customization**
- Meta Data**

At the bottom of the form are 'Save' and 'Cancel' buttons.

Logout URL at Organization Level

Different organizations can access the LMS from different login pages. Users of certain organizations can be brought to a particular login page when they log out. This is configured using the Logout URL:

PeopleFluent

Manage Center

HO Sara Logout

Overview Learning Talent Communicate Users Reports System

Organization Maintenance >

Edit Organization "10.2 Level 1"

- General Properties
- Organization Member Permissions
- eSignature
- Enrollment & Payment
- Report Distribution
- Member Management & Notification Settings
- Home Page Customization

Approver

ADAMS Cat (ZCORP_CAT) ×

New User Welcome E-mail
Select

New Password E-mail
Select

Feedback Address (E-mail or URL):

Logout URL (leave blank for default):
http://www.netdimensions.com

If not configured, the default will follow parent organisation's setting.

Organization Attributes

To manage Organization Attributes, go to **Manager Center > Users > Group and Organization > Organization Attributes**.

You can create one of the following types of attribute:

- Free text
- Text area
- Drop-down
- Numeric
- Checkbox
- Date

Attribute Code	Type	Name	Locale Formatted Label	Display areas
2014Budget	Numeric	2014 Planned Cost per Organization	2014 Planned Cost per Organization	
attr_without_owner	Free Text	attribute without owner	attribute without owner	
GERMAN	Checkbox	Is German Council Regulated	Is German Council Regulated	
Prod12	Drop-down	ORG Location	ORG Location	User Search Criteria Organization Maintenance Search Organization Selector
p2	Drop-down	ORG Location	ORG Location	
DIM	Drop-down	Org Structure	Org Structure	User Search Criteria Organization Maintenance Search Organization Selector
LEVEL	Drop-down	Organization Level	Organization Level	Organization Maintenance Search Organization Selector

Assigning Attribute Values to Organizations

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

Organization Attribute Filters

At the Individual Organization Attributes setup page, you can specify if the attribute should be available as a filter using the "Display areas" configuration:

Manage Center HO Sana Logout

Overview Learning Talent Communicate Users Reports System

Organization Attributes

Edit Organization Attribute for 2014Budget

Details

Attribute Code*
2014Budget

Name
2014 Planned Cost per Organization

Type
Numeric

Display Areas Settings

Display areas

- ☐ User Search Criteria
- ☐ Organization Maintenance Search
- ☒ Organization Selector

Save Cancel Delete

Enabling "Organization Maintenance" as display area option, for example, makes the attribute available as a filter on the Organization Maintenance page:

Organization Maintenance

HIDE FILTERS

Organization Name

Organization Attribute Name1

Filter Reset

Summary View Show In Flat View Print

- ALL
- Individual
- NETD IT
- OrgGroup1
- OrgGroup2
- OrgGroup3
- Test
- UNASSIGNED

The Organization Selector

There are two Organization Selector Formats available in System Configuration: Tree Format or Flat Format. The Flat Format displays the matching organizations as a list:

Organization Selection

▼ Hide filters

Organization Name

Organization Level

Warwick Dealership

ORG Location

Type of ORG

ORG Structure

Results per Page: ▼

Showing: 1 - 2 of 2

<input type="checkbox"/>	Organization Name(Code)	Organization Level	Warwick Dealership	ORG Location	Type of ORG	Org Structure
<input type="checkbox"/>	ALL/NetDimensions(NetD)					
<input type="checkbox"/>	ALL/NetDimensions/Product Management/NetDimensions - North America(PM_Americas)					

Showing: 1 - 2 of 2

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

Organization Selection

▼ Hide filters

Organization Name

Type of ORG

Organization Level
(No Selection) ▼

ORG Structure
(No Selection) ▼

Warwick Dealership

ORG Location
(No Selection) ▼

Filter

Reset

☐

ALL

☐

10.2 Level 1

☒

_Lv-6

☒

_Lv-7

☐

Asia Pacific

☐

Client services

☐

Demo

☐

Designer Candidate

☐

Direct Appraisers

☐

E-Sig Test

☐

Esign_sample

☐

Esign_sample_2

☐

[REDACTED]

☐

[REDACTED]

☐

[REDACTED]

☐

[REDACTED]

☐

[REDACTED]

☐

[REDACTED]

OK

Cancel

Role Access Control

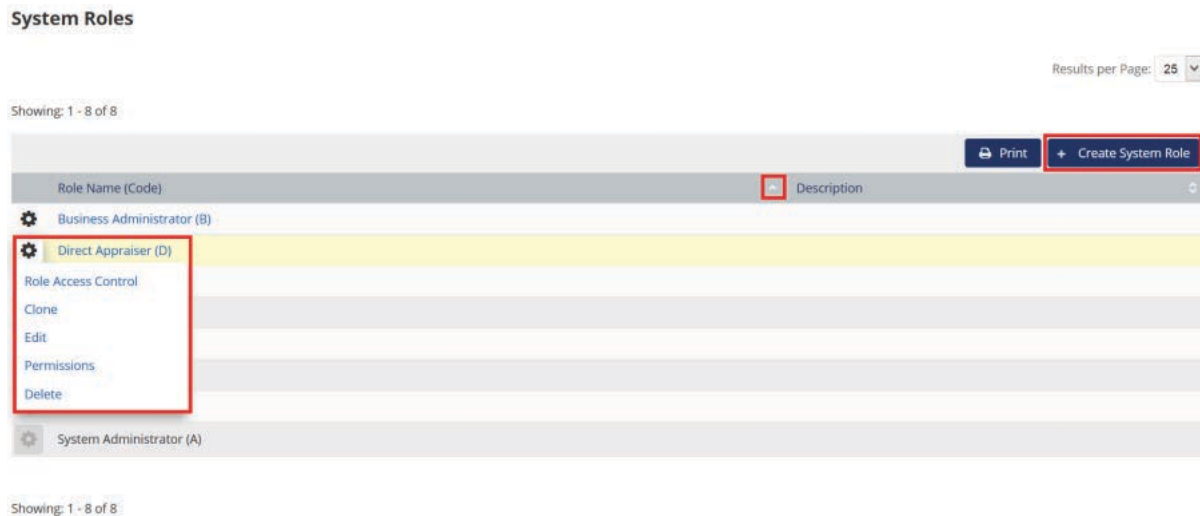
The proper configuration of role access rights should be done in the context of an overall organizational security policy. As part of this policy, organizations determine which roles need to be defined, the areas to which each role is allowed access and the type of access allowed.

The LMS allows three types of access to functional areas:

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

Manage System Roles Screen

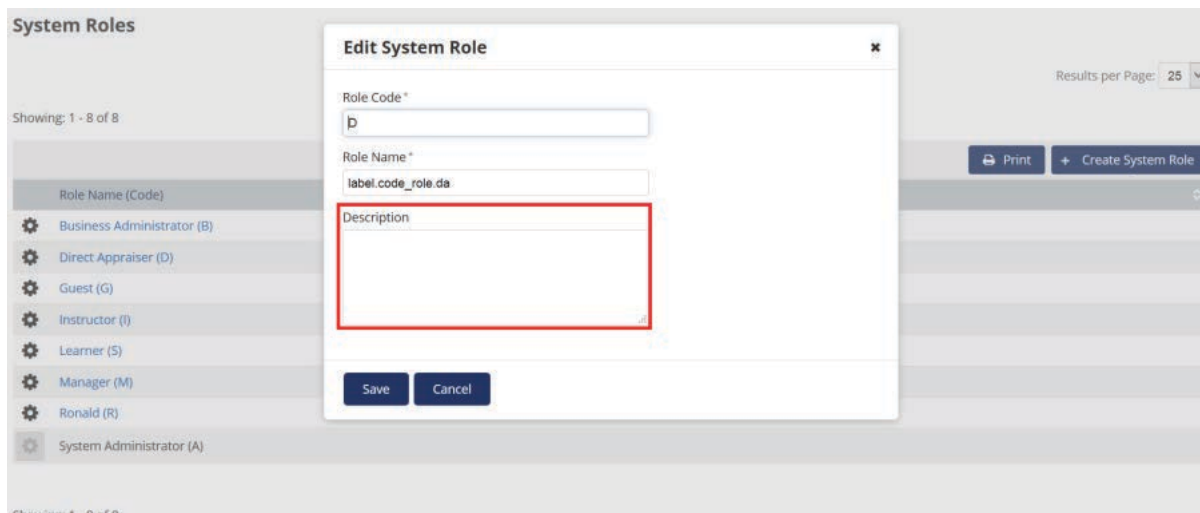
Each user is at least tagged with a role on the system. On a global system, there could be roles set up that are region-specific. System Roles are managed from Manage > USERS > ROLES > System Roles:



From here you can do the following per role:

1. Configure role access control
2. Clone the role
3. Edit the role
4. Configure permissions
5. Delete the role

For the creation, editing and cloning actions, a dialog pops up to ask for the role code, role name and description:



Configuring Role Access Control

There are presently five licensing options for the LMS, each with a subset of features that you can enable/disable per system role:

1. Performance
2. Exams
3. Learning
4. E-Learning

5. E-Learning Plus

The following features are categorized into:

1. Learning Oriented Features
2. Review Features
3. Manage Features
4. Data Access Control

For each role, you can configure which features the role may access and if it should be Read-only or Unrestricted access. Some functions or pages may be grouped together as a single feature.

Navigation menus are configured separately. For example, if a user role has access to Review Enrollments but Review Enrollments is not in the navigation menu, the user role will not be able to see Review Enrollments in the menu but would be able to access it directly using the Review Enrollments URL.

Learner Oriented Features

Learn Features

Access control for role: System Administrator

Role Name: System Administrator

The settings below indicate the access control in effect for this role for each of the listed functions. Several of the features listed below (e.g., Course Properties) actually consist of multiple screens, so the access control setting applied here is in effect for all of the related transactions.

Learner-Oriented Features		No access	Read only	Unrestricted
Learn Features	Learn Menu	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Explore Features	Current Learning Modules	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Communicate Features	My Enrollment Requests	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Personalization Features	Records/Transcript	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Other Menus	External Training Records	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Review Features	Activity Log	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Manage Features	Printer-Friendly Exam Transcripts	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Data Access Control	Certifications	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Knowledge Center	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Career Development Center1	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Competencies	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Job Profiles	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
	Development Goals	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>





Update access control settings Print

You can specify access rights to:

Learn Menu / Current Learning Modules	If you specify <i>No Access</i> for this option the role will not have access to the Learn screen, the Learn button will not appear and the Current Learning Modules hyperlink will not appear in the Home page.
My Enrollment Request	By specifying <i>No Access</i> for this option, the role will not be able to access the My Enrollment Request under the Learning Center.
Records/Transcript	If you specify <i>No Access</i> for this option, the role will not have access to transcript records and the Records/Transcript icon will not appear in the screen.
Printer-Friendly Test Transcripts	If you specify <i>No Access</i> for this option, the role will not have access to printerfriendly exam transcripts.
Certifications	If you specify <i>No Access</i> for this option the role will not be unable to review the certificates he/she has attained and the Certificates Achieved icon will not appear in the screen.
Knowledge Center	By specifying <i>No Access</i> for this option, the role will not be able to access the Knowledge Center from the Home page.
Career Development Center	By specifying <i>No Access</i> for this option, the role will not be able to access the Career Development Center.
Competencies	By specifying <i>No Access</i> for this option, the role will not be able to access the competencies under the Career Development Center.
Job Profiles	By specifying <i>No Access</i> for this option, the role will not be able to access the Job Profiles under the Career Development Center.
Goals	By specifying <i>No Access</i> for this option, the role will not be able to access the My Performance Goal under the Career Center.
Overall Status	Read Access enables the Overall Status menu item (non-tabbed skins) or tab (tabbed skins). Unrestricted permits users to make appropriate changes to their status for enrolled modules.
Skills	If you specify <i>No Access</i> for this option, the role will be unable to review his/her results of the skills tests he/she had taken and the Skills Tests Results icon will not appear in the screen.
Training Plan	By specifying <i>No Access</i> for this option, the role will not be able to view his/her training plan and the Training Plan icon will not appear in the screen.
Training Gap Analysis	By specifying <i>No Access</i> for this option, the role will not be able to access the My Trainign Gap Analysis under the Career Center.
Accounts	By specifying <i>No Access</i> for this option, the role will not be able to review his/her Account Status and the Accounts icon will not appear in the screen.
Payment History	By specifying <i>No Access</i> for this option, the role will not be able to view the payment history.
Personal Calendar	By specifying <i>No Access</i> for this option, the role will not be able to view his/her Personal Calendar and the Personal Calendar icon will not appear in the screen nor on the Home Page.

Personal Notebook	By specifying <i>No Access</i> for this option, the role will not be able to view his/her Personal Notebook. In non-tabbed skins, the Personal Notebook item will not appear in the Learn menu.
Peer Comments	By specifying <i>No Access</i> for this option, the role will not be able to view or enter comments regarding a course in the Peer Comments screen from the Home page.
Performance Appraisal	By specifying <i>No Access</i> for this option, the role will not be able to access the Performance Review function in the Career Development Center.
Learning Path	By specifying <i>No Access</i> for this option, the role will not be able to access the Learning Path function.
My Files	By specifying <i>No Access</i> for this option, the role will not be able to access the My Files function.


Explore Features

Explore Features	No access	Read only	Unrestricted
Catalog Menu	<input type="radio"/>		<input type="radio"/>
Catalog Browser	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Allow Session Enrollment	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
News Search	<input type="radio"/>		<input type="radio"/>
Skills Assessments	<input type="radio"/>		<input type="radio"/>
Know Your Colleagues	<input type="radio"/>		<input type="radio"/>

You can specify access rights to:

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

Communicate Features

Communicate Features	No access	Read only	Unrestricted
Communicate Menu	<input type="radio"/>		<input type="radio"/>
Forum	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Mail	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Message Board	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Chat	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Mass E-mail Sender	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

You can specify access rights to:

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

Personalization Features

Personalization Features	No access	Read only	Unrestricted
Preferences Menu	<input type="radio"/>		<input type="radio"/>
User Preferences	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Address Change	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Profile Summary	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Employment Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Contact Details	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Resumé	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Education	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Work History	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Language Skills	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
User Attribute Extension	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Relocation Interests	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Password Change	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
My Orgs	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Terms of Use	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

You can specify access rights to:

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

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

Other Menus

Other Menus	No access	Read only	Unrestricted
News Menu	<input type="radio"/>		<input type="radio"/>
Wiki	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

You can specify access rights to:

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

Review Features

Review Features covers access to actions performed on individuals other than yourself, that is, people you manage or supervise to some extent. Who you can see in the system is determined by [User Visibility](#).

Review Features - Access Rights

Review Features

Review Features	No access	Read only	Unrestricted
Review Menu	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Organization Review	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Overall Status	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Instructor	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Detailed Review by Instructor	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Enroll Participant From Teach Review	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Report Manager	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Dashboard	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Direct Appraiser Review	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Appraisal Search	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Group Review	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Task Approval	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Enrollment Approval	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Withdrawal Approval	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Ext. Training Approval	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Certification Approval	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Supervisor Assessment	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Enrollment Wizard	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Review Enrollment	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

You can specify access rights to:

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

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

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

You can specify access rights to:

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

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

Manage Features

Manage Menu

Manage Features	No access	Read only	Unrestricted
Manage Menu	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
News Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Repository Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
mEKP Administration	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Appraisal Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Terms of Use Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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

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

You can specify access rights to:

Manage Menu	<p>If you specify No Access for this option the role will not have access to the Manage screen (and the Manage button will not appear) nor would the role be able to access:</p> <ol style="list-style-type: none"> 1. Catalog Manager 2. User Manager 3. Test Manager 4. Community Manager 5. News Manager 6. Skills Manager 7. Report Manager 8. Object Installation Manager 9. Systems Administration Manager <p>or their associated functions from the Manage screen (though the role could, for example, access the screens if he/she knew the relevant URL)</p>
News Manager	<p>If you specify No Access for this option, the role will not have access to the News Manager screen and the News Manager icon will not appear in the screen. The role would not be able to access News Manager functions (from the News Manager screen) such as creating, editing, deleting or viewing an article in the library or the addition, deletion or modification of news categories.</p>

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

Compliance Analytics	No access	Read only	Unrestricted
Compliance Analytics	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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

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

You can specify access rights to:

Catalog Manager	If you specify <i>No Access</i> for this option the role will not have access to the Catalog Manager screen
Catalog Editor - Module Management	If you specify <i>No Access</i> for this option the role will not have access to Catalog Editor - Module Management
Catalog Editor - Session Management	If you specify <i>No Access</i> for this option the role will not have access to Catalog Editor - Session Management
Catalog Configuration	This controls access to the catalog structure (creating new catalogs & organizing the structure of catalogs)
Catalog Structure	This controls access to catalog configuration settings (e.g. subjects and vendors)

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

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

Exam Manager Features

Exam Manager Features	No access	Read only	Unrestricted
Exam and Question Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Exam Utilities	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Exams	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Questions	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Exam Configuration	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Data Loader	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Exam Review	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Allow the user to modify the exam after the end date.	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Exam Generator	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Exam Participants Review	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Automatic Exemption Policies	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Question Attributes	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

You can specify access rights to:

Exam Manager	If you specify <i>No Access</i> for this option the role will not have access to the Exam Manager screen.
Exam Utilities	If you specify <i>No Access</i> for this option the role will not have access to the Exam Utilities screen, and the Exam Utilities menu item will not appear in the Manage menu.
Exam Template Editor	If you specify <i>No Access</i> for this option the role will not have access to the Exam Template Editor tab under the Exam Manager menu.

Question Editor	If you specify <i>No Access</i> for this option, the role will not have access to the Question Editor and the Question Editor icon will not appear in the Exam Manager screen. If you specify <i>Read Only</i> access the role will not be able to create nor edit questions.
Exam Configuration	If you specify <i>No Access</i> for this option, the role will not have access to the Exam Configuration screen and the Exam Configuration icon will not appear in the Exam Manager screen. If you specify <i>Read Only</i> access, the role will be able to access the Test Configuration but will not be able to add, update or delete: <ul style="list-style-type: none"> o Test Pools o Test Display Styles o Question Pools.
Data Loader	If you specify <i>No Access</i> for this option, the role will not have access to the Question Data Loader in the Exam Utilities screen. If you specify <i>Read Only</i> access the role will not be able to use the QTI Importer or CSV Loader.
Exam Review	If you specify <i>No Access</i> for this option, the role will not have access to the Question Review screen.
Allow the user to modify the exam after the end date.	If you specify <i>No Access</i> for this option, the role will not have access to the Exam Generator screen in the Exam Manager screen. If you specify <i>Read Only</i> access the role will not be able to generate exams
Exam Generator	If you specify <i>No Access</i> for this option, the role will not allow you to generate an instance of an exam and wrap it with an online course.
Exam Participants Review	If the permission is „ <i>No Access</i> “, the new menu item will not be shown at the top of the Exam Template Editor to allow the role view the list of participants of the exam as well as delete some of the exam records to reset the number of attempts for participants. If the permission is „ <i>Read Only</i> “, the user will be able to view the list of exam participants but will not be able to delete any exam attempts. If the permission is „ <i>Unrestricted</i> “, the user will be able to view the list of exam participants as well as deleting participants' exam attempts.

User Manager Features

User Manager Features	No access	Read only	Unrestricted
User Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Users	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Role Permissions	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
User ID Change	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
User Attributes Configuration	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
User Data Loader	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
User Profile Data Loader	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
User Groups	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
User Group Data Loader	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Organization Data Loader	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Bulk Role Update	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Role Access Data Loader	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Report Manager	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
User Targeting Template Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

You can specify access rights to:

User Manager	If you specify <i>No Access</i> for this option the role will not have access to the User Manager screen
User Editor	If you specify <i>No Access</i> for this option, the role will not have access to the User Editor and the User icon will not appear in the User Manager screen. If you specify <i>Read Only</i> access the role will be unable to create or edit user accounts. If this role will be involved in uploading accounts through the CSV data loader, the role should be allowed <i>Unrestricted</i> access for this function.
Role Permissions	If you specify <i>No Access</i> for this option, the role will not have access to the Role List Configuration or Role Access Control screens and the respective icons will not appear in the User Manager screen. If you specify <i>Read Only</i> access the role will be unable to edit role permission and the role will be unable to add, update or delete new role definitions.
User Attributes Configuration	If you specify <i>No Access</i> for this option, the role will not have access to the User Attribute Maintenance screen and the User Attribute Configuration icon will not appear in the User Manager screen. If you specify <i>Read Only</i> access the role will be unable to create or edit user attribute entries.
User Data Loader	If you specify <i>No Access</i> for this option, the role will not have access to the User Data Loader screen and the User Data Loader menu item will not appear in the User Manager menu. If you specify <i>Read Only</i> access the role will be unable to upload CSV files.

User Groups	If you specify <i>No Access</i> for this option, the role will not have access to the User Manage Features Groups screen and the User Groups menu item will not appear in the User Manager menu. If you specify <i>Read Only</i> , access the role will be able view the list of user groups and their memberships. They will not be able to view the permissions of a user group.
User Group Data Loader	If you specify <i>No Access</i> for this option, the role will not have access to the User Group Data Loader screen and the User Group Data Loader menu item will not appear in the User Manager menu. If you specify <i>Read Only</i> access the role will be unable to upload CSV files.
Bulk Role Update	If you specify <i>No Access</i> for this option, the role will not have access to the Bulk Role Update screen and the Bulk Role Update menu item will not appear in the User Manager menu.

Community Manager Features

Community Manager Features	No access	Read only	Unrestricted
Community Manager	<input type="radio"/>		<input type="radio"/>
Discussion Forum Categories	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Discussion Forums	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Chat	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
Message Board	<input type="radio"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

You can specify access rights to:

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

Report Categories

Report Categories	No access	Read only	Unrestricted
Report Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Report Wizard	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Organization Reports	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Exam/Survey Reports	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
System Reports	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Course Reports	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Compliance Reports	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Certification Reports	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Published Customizer Reports	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Report Scheduler	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

You can specify access rights to:

Report Manager	If you specify <i>No Access</i> for this option the role will not have access to the Report Manager screen.
Report Wizard	The Report Wizard allows users (with access rights) to create custom reports. If you specify <i>No Access</i> for this option, the role will not have access to the Report Wizard screen and the Report Wizard icon will not appear in the Report Manager screen. If you specify Read Only access the role will be unable to make any changes or additions in these screens.
Organization Reports	If you specify <i>No Access</i> for this option, the role will not have access to the Standard Reports screen for Organization Reports and the Organization Reports icon will not appear in the Report Manager screen. Course Reports If you specify <i>No Access</i> for this option, the role will not have access to the Standard Reports screen for Learning Reports and the Learning Reports icon will not appear in the Report Manager screen.
Course Reports	If you specify <i>No Access</i> for this option, the role will not have access to course reports screen and the Course Reports will not appear in the Report Manager screen.
Compliance Reports	If you specify <i>No Access</i> for this option, the role will not have access to the Compliance Reports screen Compliance Reports icon will not appear in the Report Manager screen.
Certification Reports	If you specify <i>No Access</i> for this option, the role will not have access to the Certification Reports screen and the Certification Reports icon will not appear in the Report Manager screen.
Exam/Survey Reports	If you specify <i>No Access</i> for this option, the role will not have access to the Standard Reports screen for Test/ Question reports and the Test/ Manage Features Question Reports icon will not appear in the Report Manager screen.

System Reports	If you specify <i>No Access</i> for this option, the role will not have access to the Standard Reports screen for System Activity reports and the System Reports icon will not appear in the Report Manager screen.
Published Customizer Reports	If you specify <i>No Access</i> for this option, the role will not have access to the Published Customizer Reports screen and the Published Customizer Reports icon will not appear in the Report Manager screen.
Report Scheduler	If you specify <i>No Access</i> for this option, the role will not have access to the Scheduled Reports screen and the Scheduled Reports icon will not appear in the Report Manager screen.

Competency Manager Features

Competency Manager Features	No access	Read only	Unrestricted
Competency Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Competency Assessment Templates	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Competency Library	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Competency Group Editor	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Profile Auto-Assign Console	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Skills Assessment	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Competency Data Loader	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Competency Models	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Proficiency Levels	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Job Profiles	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Job Profile Data Loader	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Active Assessments	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
User Search	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Competency Module Expiry Data Loader	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Ad-hoc Competency Assessment Data Loader	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

You can specify access rights to:

Competency Manager	<p>If you specify <i>No Access</i> for this option the role will not have access to the Competency Manager screen.</p> <ul style="list-style-type: none"> If Read Only is specified, only the Proficiency Level and User Search tab is available. If Unrestricted is specified all features with read only and unrestricted features of Competency Manager will be available.
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Competency Assessment Templates	If you specify <i>No Access</i> for this option the role will not have access to the Competency Manager screen.
Competency Library	If you specify <i>No Access</i> for this option the role will not have access to the Competency Library.
Competency Group Editor	If you specify <i>No Access</i> for this option the role will not have access to the Competency Group Editor screen.
Profile Auto-Assign Console	If you specify <i>No Access</i> for this option the role will not have access to the Competency Manager screen.
Skills Assessment	If you specify <i>No Access</i> for this option, the role will not have access to the Skills screen and the Skills icon will not appear in the Skills Manager screen. If you specify Read Only access the role will be able to access the Skill Details and the Recommendations for Competency Learning screens but will not be able to make any changes or additions in these screens.
Competency Data Loader	If you specify <i>No Access</i> for this option, the role will not have access to the Competency Data Loader screen and the Competency Data Loader icon will not appear in the Skills Manager screen. If you specify Read Only access the role will be able to access the Competency Data Loader screen but will be unable to make any deletions, changes or additions.
Competency Models	If you specify <i>No Access</i> for this option the role will not have access to the Competency Manager screen.
Proficiency Models	If you specify <i>No Access</i> for this option the role will not have access to the Competency Manager screen.
Job Profiles	If you specify <i>No Access</i> for this option the role will not have access to the Competency Manager screen.
Active Assessment	If you specify <i>No Access</i> for this option the role will not have access to the Active Assessment function.

System Administration

System Administration	No access	Read only	Unrestricted
System Administration	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Page Statistics	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Transaction Statistics	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Connection Statistics	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Cache Statistics	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
User Sessions	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Access Violations	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Screen Layout Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
System Configuration	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Broadcast Messenger	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Database Object Statistics	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Switch User	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Home Page Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Content Server Configuration	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Login Reminder	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Background Task Monitor	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
System Language Activation	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
HTML Widgets	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

You can specify access rights to:

System Administration	If you specify <i>No Access</i> for this option the role will not have access to the System Administration Manager screen.
Page Statistics	If you specify <i>No Access</i> for this option, the role will not have access to the System Activity Statistics screen and the System Activity Statistics icon will not appear in the System Administration Manager screen. TX Statistics If you specify <i>No Access</i> for this option, the role will not have access to the Transaction Statistics screen and the Transaction Statistics icon will not appear in the System Activity Statistics screen.
Transaction Statistics	If you specify <i>No Access</i> for this option the role will not have access to the transaction statistics.
Connection Statistics	If you specify <i>No Access</i> for this option, the role will not have access to the Connection Statistics and Connection Status Listing screens. The Connection Statistics icon will not appear in the System Activity Statistics screen. If you specify Read Only access, you will be unable to reset Connection Pool statistics.

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

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

Payment Manager

Payment Manager	No access	Read only	Unrestricted
Payment Plans and Optional Payment Items	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Cost Accounting	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Payment History	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Token Packages	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Organization Token Accounts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Token Account Data Loader	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

You can specify access rights to:

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

Data Access Control

Highest Visible Organization Level

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

Basics of Organization Level Limits

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

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

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

Role General Permissions

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

You can specify access rights to:

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

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

Allow Review Appraisee All User Appraisal	This allows the role for the appraisee to review all user appraisals.
Show biographies and activities of other users in the same learning group	This role allows the user to display the biographies and activities of their users that belong to the same learning group.
Allow Token Package Purchase	Should be set to "Yes" in order to allow a role to buy tokens.
Allow Assessment Deployment	This allows the role to access the assessment deployment features.
Allow Full Organization View of Participants	<p>This overrides the usual user visibility in the Report Wizard for the following report types:</p> <ul style="list-style-type: none"> • Courseware Information • Exam Results • Learning Program Detail • Withdrawn User Details
Allow Content Package, AICC Course Structure, Resource and Web Catalogue's import	This allows the role to import content package, AICC Course Structure, Resources and Web Catalogs
Privilege Level	<p>Privilege Levels allow you to specify the relative hierarchy among different user roles with 0 being the lowest setting and 9 being the highest except for System Administrators who have a privilege level setting of 10 by default. These numbers are themselves arbitrary within NetDimensions Performance, and are only meaningful in relation to each other. These privilege levels work in conjunction with other access rights.</p> <p>A user can make role assignment changes to users (e.g. in the User Editor) with lower privilege levels but cannot make role changes to another user whose privilege level exceeds his own. This is intended to prevent local administrators who have access to the User Editor from bumping up their role assignment (or someone who reports to them) to gain new system privileges that they should not have.</p> <p>For instance, a user can create users whose privilege levels are lower than his/her own or change the role of another user (again, whose privilege level is below the first users) but the new privilege level must be lower than the first user's own privilege level.</p> <p>This option is useful for setting up hierarchies of roles where, say Privilege Level 1 is a typical user, Privilege Level 5 is a Local Administrator and 10 is the Global Administrator.</p>

Allow Additional Roles

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

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

Allow User IDs to be changed	<input type="checkbox"/>	9.2	?
Allow additional roles	<input checked="" type="checkbox"/>	10.0	?
Allow Editing of External Authentication User Account	<input checked="" type="checkbox"/>	4.6	?

Configuration Option Description

Option

Allow additional roles

Description

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

Special Notes

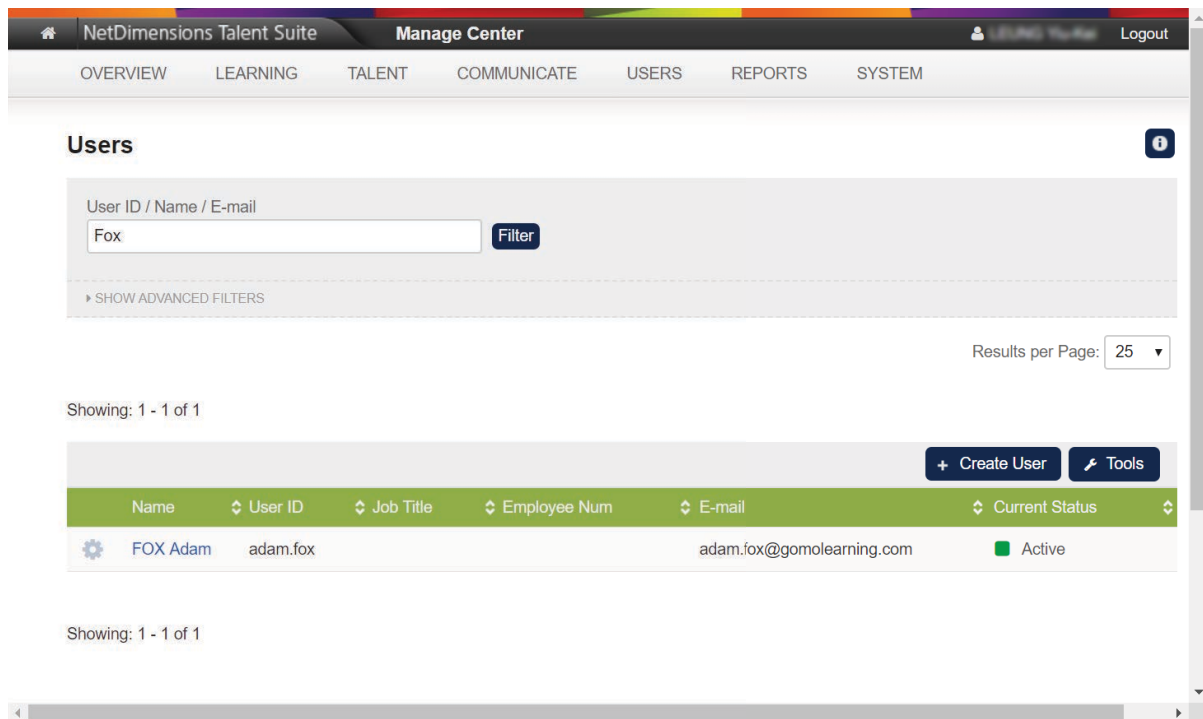
This new feature applies to User Data Loader and Report R109 as well. The column of the additional roles will be ignored if the option is disabled. And only primary roles will be considered in this case.

Note:

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

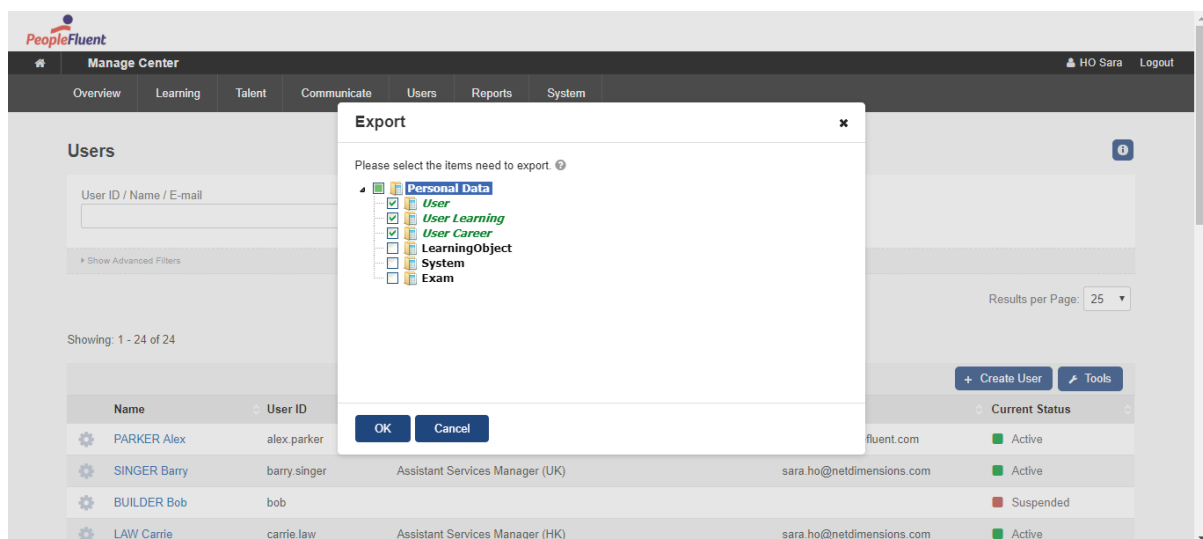
Manage Users

User Accounts are managed at USER MANAGER > Users:



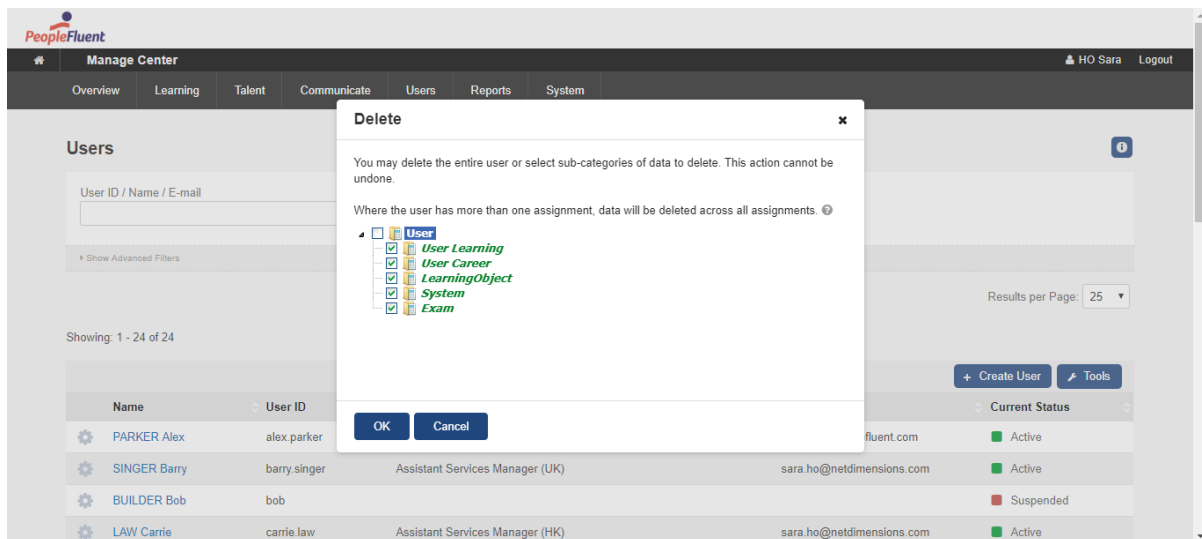
Exporting Personal Data

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



Deleting Personal Data by Category

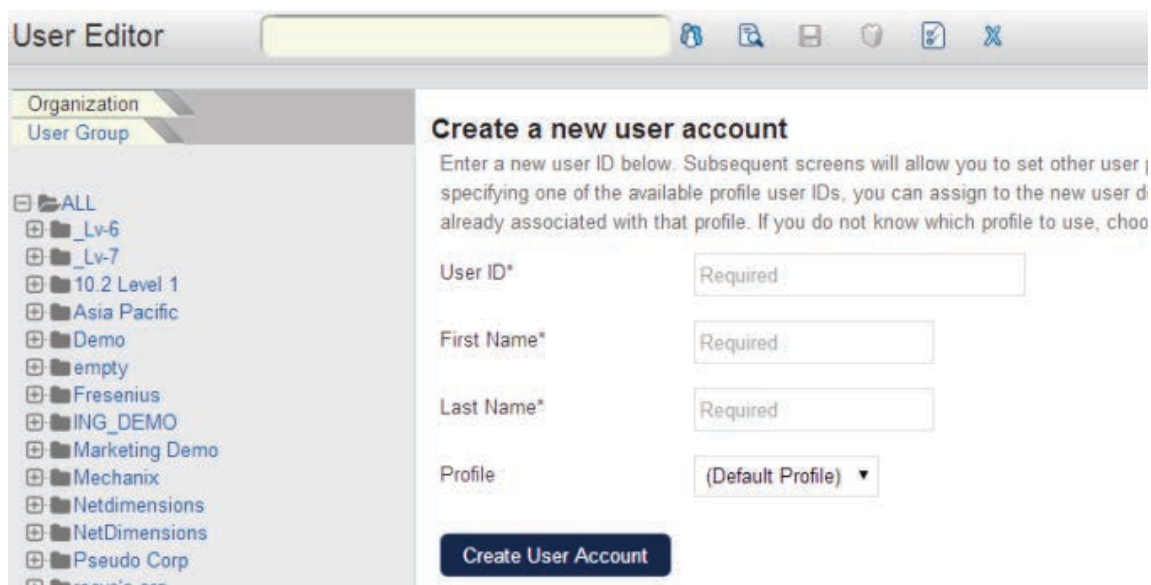
Administrators can opt to delete only the records within the selected categories of a user's personal data by clicking "Delete User Data". All categories will be checked by default.



Creating a New User Account

To create a new user account:

1. Go to **Manage Center > USERS > USER MANAGER > Users**, then click **+ Create Users**
2. Enter the **User ID**, First and Last Name, and **Password** and select the relevant profile.
Note: the User ID must be lowercase.
3. Click **Create User Account**.



4. You will be redirected to the Profile tab of the newly created user where you can edit their user properties.

Editing User Accounts

Click on a User from the Manage Users listing. The *User Properties* screen appears. From here, you can now start editing the user details. The User Properties is divided into sub sections, namely:

- Personal Information

- Employee Status
- Connects
- Assignment Details
- Contact Information
- User Attributes
- Exchange Server
- Template Setting

Personal Information

The screenshot shows the 'User Editor' window with the 'Personal Information' tab selected. The user is 'MANAGER Academy' with ID 'academy_manager' and status 'Active'. The form fields are as follows:

Field	Value
User ID	academy_manager
First Name *	Academy
Middle Name	
Last Name *	Manager
Other Name	
Gender	Unspecified
Title	
Date of Birth	e.g Jul 10, 2019
Password	*****

Below the Personal Information section, the 'Employee Status' section is visible:

Field	Value
Current Status	Active
Use External Authentication	No
Employee Num	

Employee Status

The screenshot shows the 'User Editor' window with the 'Employee Status' tab selected. The user is 'MANAGER Academy' with ID 'academy_manager' and status 'Active'. The form fields are as follows:


Field	Value
Current Status	Active
Use External Authentication	No
Employee Num	
Expiration Date	e.g Jul 10, 2019
Language	English

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

Connects

Mail Forwarding

You can configure all mail messages to be forwarded to someone instead of the user him/herself. There will be five options for the choice of the target recipient:

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

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

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

Case 1 – If User B does not have an e-mail, the e-mail will be lost.

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

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

Original Recipient: May Brown

Forwarded to: John Smith

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

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

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

Assignment Details

User Editor

Organization

- ALL
- _Lv-6
- _Lv-7
- 10.2 Level 1
- Asia Pacific
- Client services
- Demo
- Designer Candidate
- Direct Appraisers
- E-Sig Test
- Esign_sample
- Esign_sample_2

Assignment Details

Job Title:

Join Date:

Logical Domain:

Organization:

Primary Role:

Additional Roles: [+ Add Additional Role](#)

Direct Appraiser (DA):

Super-Appraiser:

Location:

Department ID:

Department Name:

HR Manager Name:

HR Manager E-mail:

Manager Name:

Manager E-mail:

Cost Center:

Cost Center Name:

Skin:

Time Zone:

Minimize Use of Pop-ups:

First Screen:

Content Server:

User Attributes

User Editor

Organization

- ALL
- Finance
- UNASSIGNED

User Attributes

User Attribute 1: [Edit](#)

User Attribute 2: [Edit](#)

User Attribute 3: [Edit](#)

User Attribute 4: [Edit](#)

User Attribute 5: [Edit](#)

User Attribute 6: [Edit](#)

User Attribute 7:

User Attribute 8:

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

Template Setting

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

The screenshot shows the 'User Editor' window. On the left is a sidebar with 'Organization' and 'User Group' tabs, and a list of user groups: 'ALL', 'Finance', and 'UNASSIGNED'. A 'Refresh' button is at the bottom of the sidebar. The main area has a 'Template Setting' section with a checkbox labeled 'This user is a profile.' and a text box below it stating 'A profile is a template from which other users can be created.'

Setting the User's Environment

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

The screenshot shows the 'User Editor' window with the 'Environment' tab selected. The tab bar includes 'Details', 'Contact Info', 'Environment' (highlighted with a red box), 'Change Organization', 'User Groups', 'Supervises', 'Status', and 'Records/Transcript'. Below the tabs, the 'User Details' section is visible, showing fields for 'Skin Selection' (NTS-83), 'Language' (English), 'Time Zone' ((GMT+08:00) Etc/GMT-8: GMT+08:00), 'Minimize Use Of Pop-ups' (No), and 'First Screen' (Home). A checkbox at the bottom is labeled 'Always enable competency management for this participant (effective only if a competency management system has been configured)'.

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

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

- If you have an external competency management system connected to the Talent Suite, you need to activate the checkbox.

Group Review / Appraisal List

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

Logically Deleting Users

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

The screenshot shows the 'User Editor' window for a user named 'MITCH Ronaldo' (ronaldom). The user is currently 'Active'. The interface includes a sidebar with a tree view of organizations and a main panel with tabs for Profile, User Groups, Supervises, Status, and Records/Transcript. The 'Profile' tab is selected, showing 'PERSONAL INFORMATION' and 'EMPLOYEE STATUS' sections. In the 'EMPLOYEE STATUS' section, the 'Current Status' dropdown menu is open, showing options: Active, Suspended, Account Closed, Logically Deleted (highlighted), Self-Registration User Pend for Approval, Locked, User Account/Records Migrated, and License Violation. Other fields include User ID, First Name, Middle Name, Last Name, Other Name, Gender, Title, Date of Birth, Password, and E-mail.

The "Logically Deleted" status can also be set for users in bulk using the User Data Loader. User

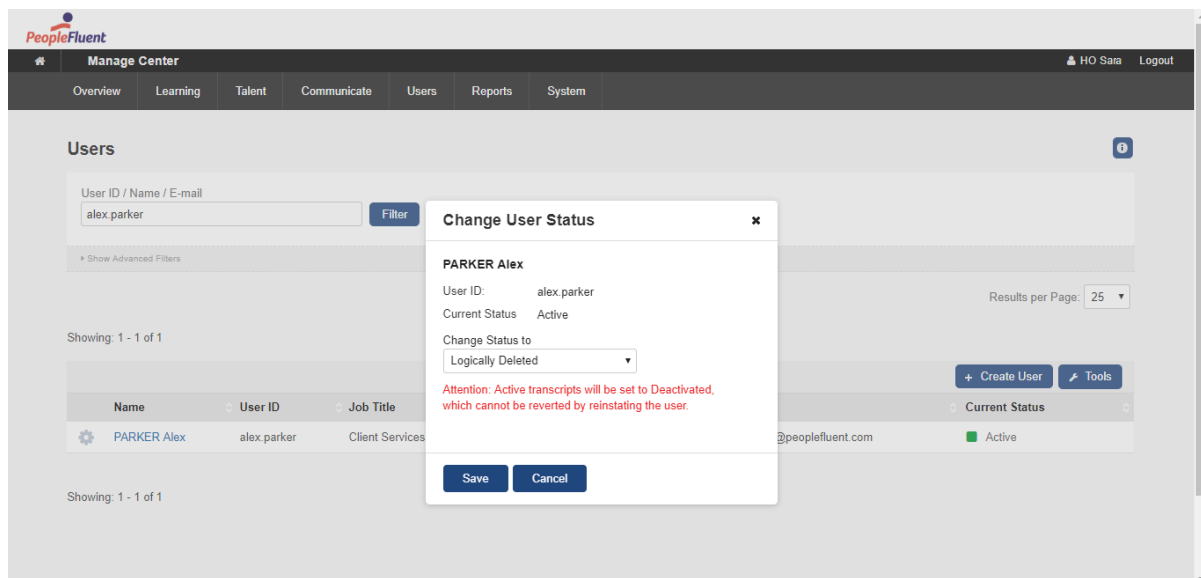
accounts in this status will not be reported on or selectable via the User Interface. As part of the GDPR compliance, administrators may set User Accounts to this status in the following scenarios:

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

To comply with GDPR, logically deleted users are not "processed" and will therefore not appear in any screens or reports in the LMS with the exception of the Manage > Users > Logically Deleted Users page.

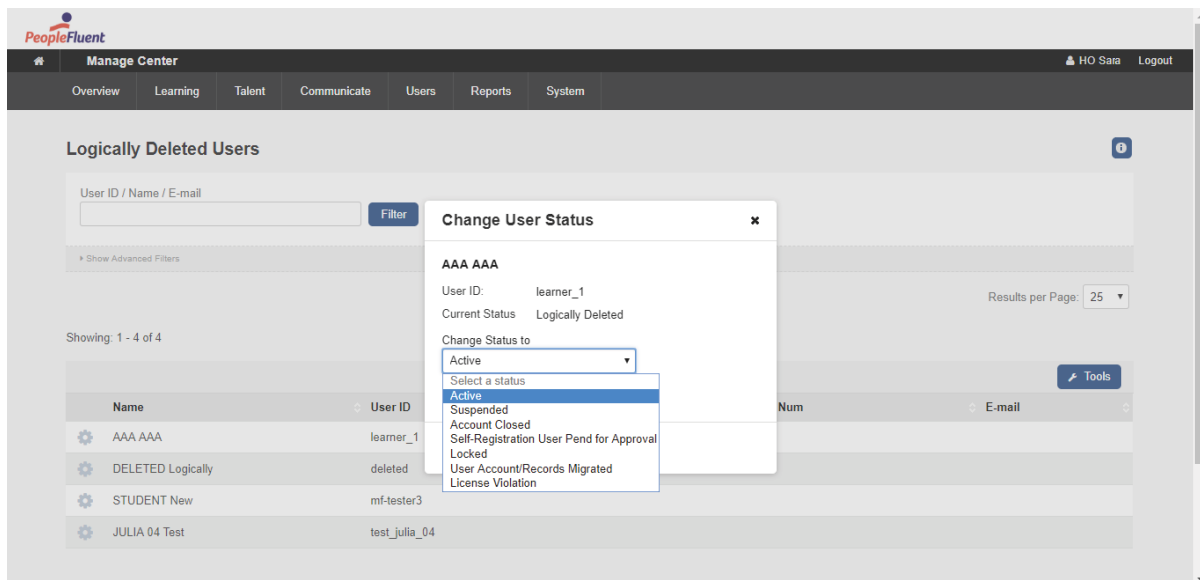
Transcript Deactivation

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



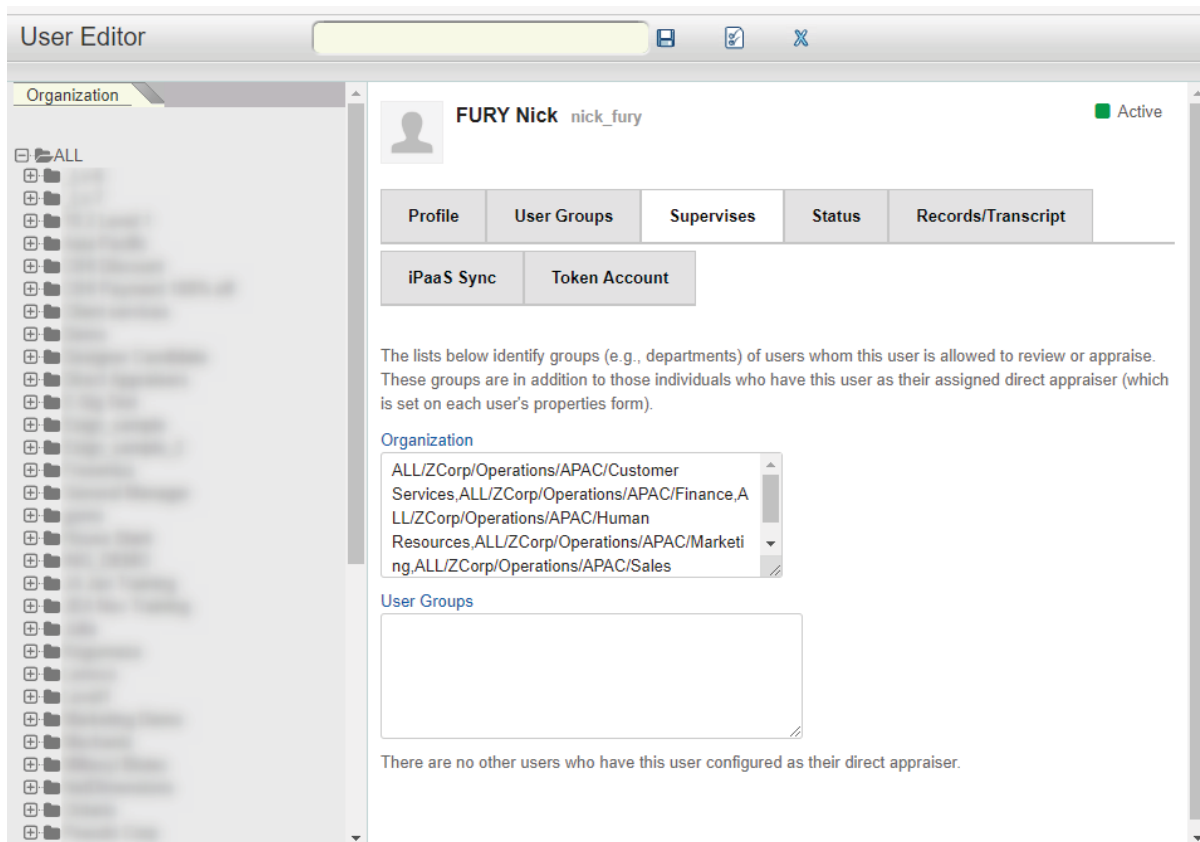
Reinstating Logically Deleted Users

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



Defining Supervision Rights

To specify who the user supervises, go to the Supervises tab. Select the organization or user group whom the user you selected will be allowed to review or appraise. Managers can further expand those organizations in order to select their child organizations. A logged in user can select the child organizations of supervised organizations when using Organization Selector.



User Visibility

Users can be viewed throughout the system. The set of users that are visible to any given user is determined by the following filtering rules:

1. System Administrators can see everyone
2. Non-system administrators can see
 - a. themselves
 - b. their direct appraisees
 - c. the members of their supervised groups
 - d. the users under their supervised or visible organizations (including sub-organizations)

Unless these users are outside the visible area of their logical domain

Logically Deleted Users

[Logically deleted users](#) are not visible in the system except at Manage Center > Users > User Management > Logically Deleted Users, which is open to roles with unrestricted access to "Logically Deleted Users".

Report Wizard Reports

The person generating a report in the Report Wizard is only able to view records of users that are visible to them. The filtering has been applied to the following report types:

- Appraisal Competency
- Appraisal Dimension
- Appraisal Free Text
- Appraisal Single Choice
- Certification History
- Exam Results (Direct)
- Job Profile
- Performance Goals
- Training History
- Training History (External)
- User Appraisal
- User Competency
- User Information

"Allow Full Organization View of Participants" Role Access Control

The "Allow Full Organization View of Participants" role access can override the usual user visibility in the Report Wizard where data related to participant information on a course for which reporter has the permission access, this applies for report types below.

- Courseware Information
- Exam Results
- Learning Program Detail
- Withdrawn User Details

It is also applied in LMS screens where course participants are listed e.g. Catalog Editor Participants.

Transcript Detail Visibility

A role access control "Display Details, Progress, and Course Interactions when Reviewing Learner Transcript Detail" is available which controls the reviewer's view of the transcript detail for reviewees. By default, only the Administrator role has this access enabled.

An Administrator can grant differing access to the transcript detail of reviewees to reviewers, direct appraisers, and instructors under the Organization Maintenance. Similar to the '**Level of Visible Transcript**

t Detail for learners' option in System Configuration, the levels of transcript detail visible that can be set are:

1. Completion Status Only
2. Details and Overall Progress
3. Details, Overall Progress, and Individual SCO Progress
4. Details, Overall Progress, Individual SCO Progress, and Course Interactions

For those with visibility level set to "**Completion Status Only**", the transcript detail page will not be accessible from the Records/Transcript page.

For those with visibility level set to "**Details, Overall Progress**" or above, they will have access to the transcript details page and accordingly be able to view more transcript detail. When the option selected is "**Details, Overall Progress, Individual SCO Progress, and Course Interactions**", they will have full access to all information on the transcript details page.

If a reviewer can view full transcript details, they can also open the detail transcript page by clicking the title links. In the Active/Archive Course areas of the Teach menu, full transcript detail is always displayed except when a transcript is in "*Pending Approval*" or "*Waitlisted*" status in User Review. The level of transcript detail available under the Administrative Access area is controlled by the same rule as the CDC.

Instructors are usually able to see full transcript details, however in some highly regulated countries, even Instructors aren't allowed to have access to transcript details like question responses and scores. In cases like this, the LMS has a feature to control the level of transcript details Instructors can view, which is configurable at the organization level. This setting complements the other two options that applies to the direct appraiser or to reviewers in general.

▼ **Organization Member Permissions**

Allow members to edit

- ☒ Manager Name
- ☒ Manager E-mail
- ☒ Cost Center
- ☒ Location Code
- ☐ Enable external competency management (The competency management system must have been configured)

When reviewing transcripts of a learner in this organization:

☐ Inherit the following parent settings:

Reviewers in general should see Details, Overall Progress, Individual SCO Progress, and Course Interactions
 The Direct Appraiser of the learner should see Details, Overall Progress, Individual SCO Progress, and Course Interactions
 An Instructor of the course should see Details, Overall Progress, Individual SCO Progress, and Course Interactions

☒ Reviewers in general should see Completion Status Only

The Direct Appraiser of the learner should see Completion Status Only

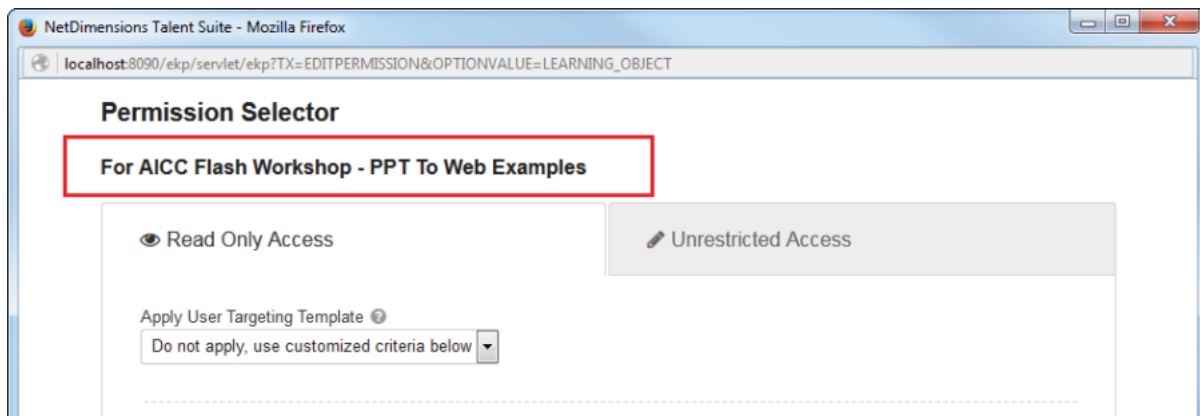
An Instructor of the course should see Completion Status Only

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

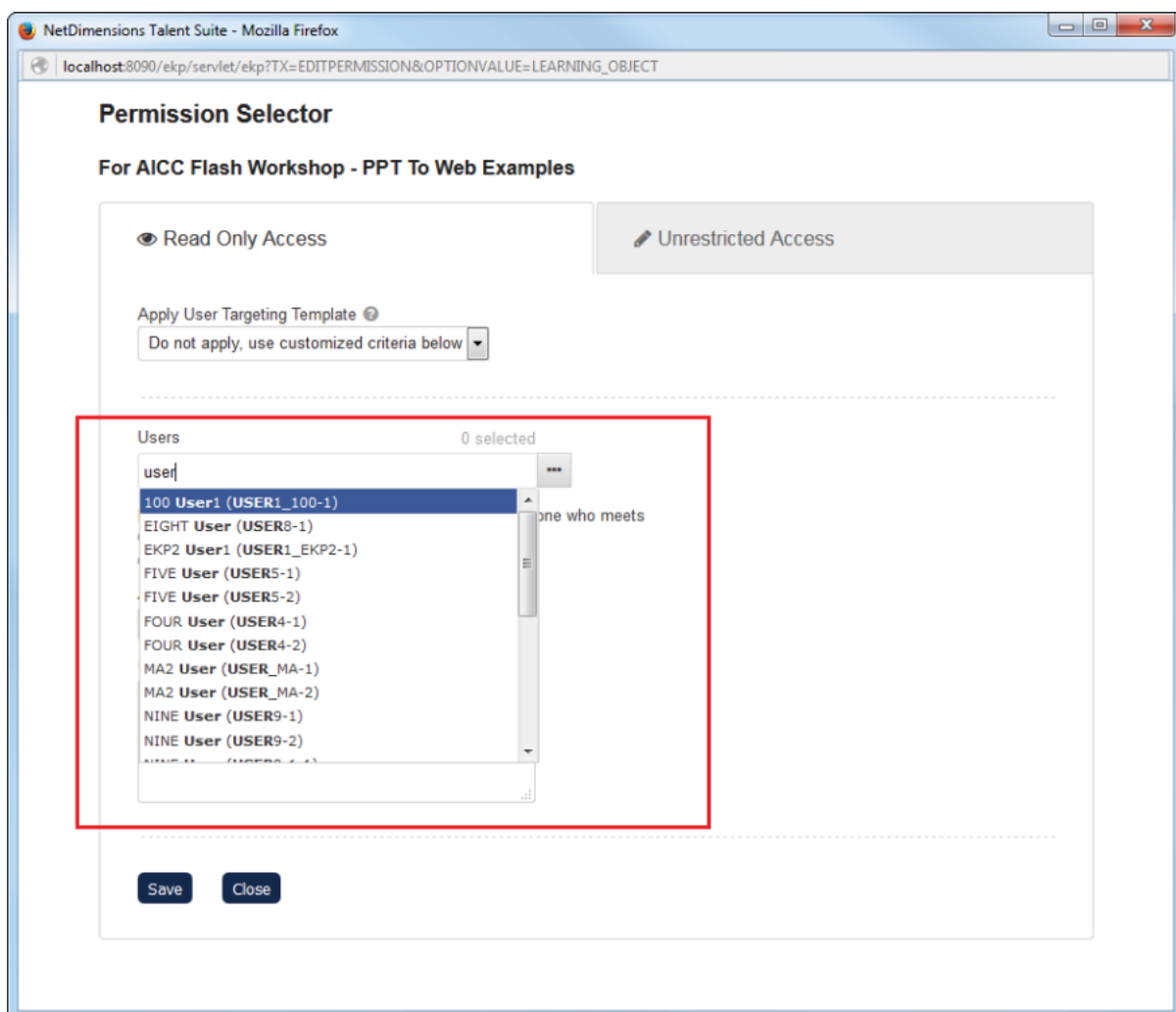
Standard Permission Selector

Access to objects are controlled using permissions and permissions are configured using the Permissions Selector.

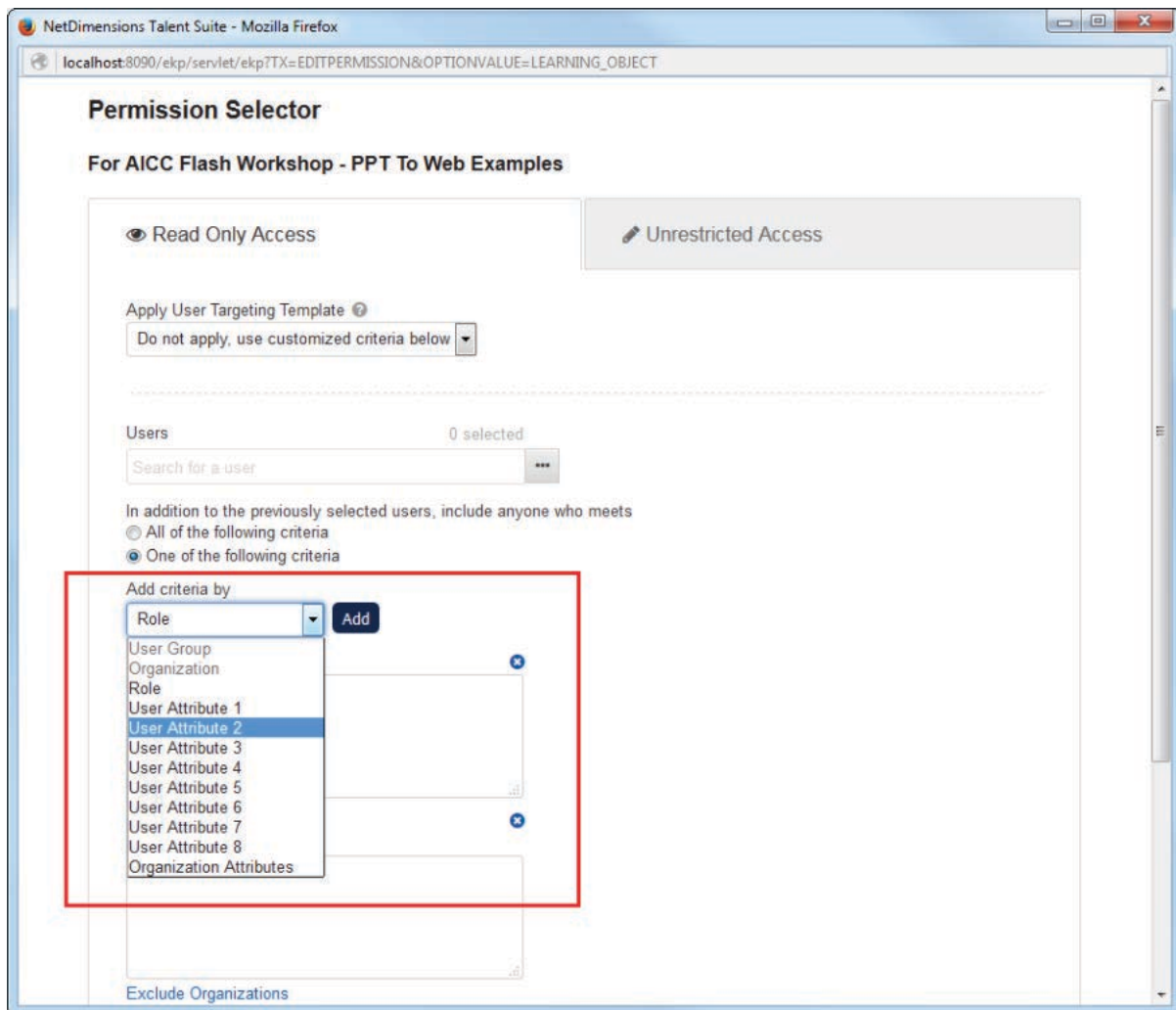
The target object name where the permission is being edited on is displayed on the Selector.



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



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



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

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

Permission Selector

Use the links below to select the users, user groups, organizations, and roles that can access this object.

Read Only Access **Unrestricted Access**

Users

MOLINA Alon (ALON)

In addition to the previously selected users, view permissions will be granted to anyone who meets
☐ All of the following criteria
☒ One of the following criteria
Add criteria selector:

User Group

Go

Organization

✕

Include Organizations

Belgium, England, France, Netherland

Exclude Organizations

Germany

Save

Close

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

Organization Attribute Criteria for Permission/Targeting

Administrators may select users based on organization attributes for:

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

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

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Permission Selector

Use the links below to select the users, user groups, organizations, and roles that can access this object.

Read Only Access

Unrestricted Access

Add criteria selector:

Organization Attributes Go

Organization Attributes ✕

Permissions will be granted to anyone whose direct organization has attributes matching all of the following selected criteria

☒ 'Organization Type' has any of the following values

☒ IT

☐ Sales

☐ 'Location' contains

☒ 'Head Count' is between and

☐ 'Aims and Objectives' contains

☒ 'Open Saturday' is checked

Save

Close

User Targeting Templates

You may use User Targeting Templates where the same set of users will be targeted across multiple objects.

Setting Up a Targeting Template

To manage User Targeting Templates, go to **Manage Center > Users > Group and Organization > User Targeting Template Manager**. Within the template, define criteria to target a set of users:

OVERVIEW

LEARNING

TALENT

COMMUNICATE

USERS

REPORTS

SYSTEM

User Targeting Template Manager

GENERAL PROPERTIES

Code* ?

Required

Name:* ?

Required

USER TARGETING TEMPLATE SETTINGS

Use the links below to select the users, user groups, organizations, and roles that can access this object.

Users

In addition to the previously selected users, view permissions will be granted to anyone who meets

☐ All of the following criteria

☒ One of the following criteria

Add criteria selector:

User Group

Go

Save

Cancel

Linking Permissions and Target Audiences to Templates

In the Permission or Target Audience Selector, you can opt to select a user targeting template instead of defining criteria explicitly:

Permission Selector

For CIs

Read Only Access

Unrestricted Access

Apply User Targeting Template ?

T1

Do not apply, use customized criteria below

Apply Template

T1

T2

T3

Search for a user

In addition to the previously selected users, include anyone who meets

☐ All of the following criteria

☒ One of the following criteria

Add criteria by

User Group

Add

Save

Close

While a template is selected, any existing criteria selections will be grayed out and cannot be applied. Once object permissions are linked to a template, any subsequent changes to the template will also affect the target audience or permission of the said object.

Besides the standard Permission Selector, the User Targeting Template is supported at Appraisal Target Audience, Activate a System language, and Create Token Package.

User Targeting Template Support in Data Loaders

User targeting templates is supported in the Role Access Data Loader, Question Data Loader, and Equivalency Rule Data Loader. In order to use a template in the Data Loader, the person performing the upload needs to have at least Read permission on the template. For data loaders, you have the option to:

1. Link the user targeting template to the object such that subsequent changes to the template will affect the object
2. Copy the user targeting template settings to the object such that subsequent changes to the template will not affect the object

The following data loader fields allow you to customize object access using data loaders:

Field	Description
Read Permissions Template	The code of the template to use for read permissions
Write Permissions Template	The code of the template to use for write permissions
Target Audience Template	The code of the template to use for target audience

AssignReadTemplate	"L" to link to the user targeting template as the permission targeting criteria "C" to completely copy and replace the permission settings on this object using the current configured settings from the user targeting template
AssignWriteTemplate	"L" to link to the user targeting template as the permission targeting criteria "C" to completely copy and replace the permission settings on this object using the current configured settings from the user targeting template
AssignTargetAudienceTemplate	"L" to link to the user targeting template as the target audience criteria "C" to completely copy and replace the target audience settings on this object using the current configured settings from the user targeting template

Equivalency Rule Data Loader

Target Audience will be set to specified User Targeting Template even if the "Apply Target Audience to All Organizations" loader option has been enabled.

User Targeting Template as Search Filter

When the "Enable User Targeting Template Search Filter" System Configuration is enabled, a filter is added to search screens to allow you to search for all objects of the given type that use a given User Targeting Template for either read or write permissions. This can be seen on the following screens:

1. Learning Modules
2. Teach Session Administration
3. Email Templates
4. Job Profile Catalogs

Terms of Use

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

Terms of Use have the following status:

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

Terms of Use Manager

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

- **Title**
- **Status** (Pending or Published)

- **Acceptance** -The number of users that have accepted each Terms of Use. The Acceptance Details can be viewed by clicking the number directly.
- **Date Created**

NetDimensions Talent Suite Manage Center

OVERVIEW LEARNING TALENT COMMUNICATE USERS REPORTS SYSTEM

Terms of Use Manager

Results per Page: 10

Showing: 1 - 8 of 8

+ Create Terms of Use

Title	Status	Acceptance	Date Created
Test	Published	78	May 5, 2014 11:45 AM
View	Published	1	Jun 19, 2014 7:41 PM
Clone	Published	1	Jul 17, 2014 9:34 PM
Permissions	Published	1	Jan 16, 2015 12:44 PM
Target Audience	Published	1	Jan 16, 2015 12:50 PM
Test Julia	Published	4	Apr 17, 2017 4:49 AM
TS Terms of Use	Published	6	Jul 19, 2017 5:13 PM
GOT Terms of Use ("Terms")	Published	0	Jan 25, 2018 2:57 PM

Showing: 1 - 8 of 8

NetDimensions

<https://preview.netdimensions.com/preview/servlet/ekp/termsofuselistbrowser#!>

For each Terms of Use, you can:

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

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

Creating New Terms of Use

1. Click **+ Create Terms of Use**.
2. Enter a Title, the Terms of Use Text, and the Agree Checkbox Label.
5. Click **Save**.

NetDimensions Talent Suite **Manage Center** Logout

OVERVIEW LEARNING TALENT COMMUNICATE USERS REPORTS SYSTEM

Terms of Use Manager >

Create Terms of Use

Title* ?
GOT Terms of Use ("Terms")

Text* ?

B I U S Arial 10pt [List Icons] [Link Icon] [Image Icon] [Code Icon]

Last updated: 1 February 2018

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

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

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

Termination

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

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

Links To Other Web Sites

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

Save **Save and Publish**

Targeting Terms of Use

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

1. Click **Target Audience** under the drop down of the desired Terms of Use in **Terms of Use Manager**, or the **Target Audience** Button on the **View / Edit Terms of Use** Page.
2. In **Target Audience** Selector, enter the user criteria.
3. Click **Save**.

Publishing Terms of Use

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

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

Viewing Terms of Use

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

Terms of Use Manager >

View Terms of Use

Title: TS Terms of Use

Text:

Terms of Use ("Terms")

Last updated: 1 July 2017

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

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

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

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

Links To Other Web Sites

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

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

Changes

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

Contact Us

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

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

Date Created: Jul 19, 2017 5:13 PM

Status: Published

Acceptance: Accepted: 6, Target Audience: 6 [View Details >](#)

[Permissions](#) [Target Audience](#) [Clone](#)

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

Viewing the Acceptance Details

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

NetDimensions Talent Suite **Manage Center** Logout

OVERVIEW LEARNING TALENT COMMUNICATE USERS REPORTS SYSTEM

[Terms of Use Manager](#) > [TS Terms of Use](#) >

Acceptance Details

Accepted: 6, Target Audience: 7 Results per Page: 10

Showing: 1 - 7 of 7

Target Audience Name	Acceptance Status	Accepted Date
CASEY Tim (CPK1)	Accepted	Jul 24, 2017 4:51 PM HKT
K CP (CPK)	Accepted	Jul 20, 2017 11:56 AM HKT
LEUNG [REDACTED] (NETD_ [REDACTED])	Accepted	Jul 20, 2017 9:45 AM HKT
[REDACTED] Robert (NETD_ROB)	Accepted	Jul 19, 2017 5:42 PM HKT
STRUCTOR IN (INSTRUCTOR123)	Accepted	Oct 12, 2017 1:46 AM HKT
[REDACTED] Morris (NETD_MORRIS)	Accepted	Nov 18, 2017 12:14 AM HKT
VISIBLE1 Level2 (LEVEL2VISIBLE1)	Not Yet Accepted	Not Available

Showing: 1 - 7 of 7

NetDimensions

Checking Acceptance Per User

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

The screenshot shows the 'User Editor' window for user 'K CP cpk'. The left sidebar lists various organizations, including 'ALL', 'Lv-6', 'Lv-7', '10.2 Level 1', 'Asia Pacific', 'CIHI Discount', 'CIHI Payment 100% off', 'Client services', 'Demo', 'Designer Candidate', 'Direct Appraisers', 'E-Sig Test', 'Esign_sample', 'Esign_sample_2', 'Fresenius', 'House Stark', 'ING_DEMO', 'JA Jan Training', 'JEA Nov Training', 'Julia', 'Lenovo', 'Level1', 'Marketing Demo', 'Mechanix', 'NetDimensions', 'Ontario', 'Pseudo Corp', 'reeve's org', 'Russia', 'Sales', 'Service team', 'solo', 'temp', 'Test-NetD', 'The Courseware Company', 'UNASSIGNED', 'Winterfell', and 'ZCorp'. A 'Refresh' button is at the bottom of the sidebar.

The main content area shows the user's profile and statistics. The user is 'K CP cpk' and is 'Active'. The tabs include 'Profile', 'User Groups', 'Supervises', 'Status', 'Records/Transcript', and 'Token Account'. The 'Status' tab is selected.

Meta Data

Created by:	LEUNG Yiu-Kei (netd_yk)
Date User ID Created:	Jul 7, 2017 3:29 PM HKT
Last Updated By:	LEUNG Yiu-Kei (netd_yk)
Last Updated:	Jan 22, 2018 2:31 PM HKT

User Statistics

General user session-related statistics. Note that the total and average session times only include sessions where the user logged out properly.

Last Log-In:	Jan 25, 2018 11:26 AM HKT
Last PW Change:	Jul 11, 2017 9:56 AM HKT
Last Auto-Enroll Scan:	Jan 25, 2018 11:26 AM HKT
New User Welcome E-mail:	Jul 7, 2017 4:14 PM HKT
Last Offline Auto-Enroll Scan:	Unknown
Logins:	88
Logouts:	108
Total Elapsed Log-In Time:	149:18:22
Average Time per Session:	01:22:56
Messages Pending:	0

Terms of Use

Title	Agreed Date
TS Terms of Use	Jul 20, 2017 11:56 AM

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

Access Control

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

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

User Attributes

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

- **User Attributes as Manage > Users Filters**

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

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

[User Attribute Configuration >](#)
Create/Edit Entries For "User Attribute 2"

Code * ⓘ
0

Name * ⓘ
Unassigned

Display areas

☐ User Search Criteria

Save

Cancel

[User Attribute Extension >](#)
Create/Edit Entries For "UserExtension1"

Attribute Label *
UserExtension1

Code * ⓘ
1

Name ⓘ
test1

Permissions...

2

test2

Permissions...

Display areas

☒ User Search Criteria

Permissions...

Save

Cancel

Delete

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

Users

HIDE FILTERS

First Name: Last Name: User ID: Assignment ID:

Logical Domain: Organization: Job Title: Employee Number:

E-mail: Role: Status: User Group:

User Attribute 1: User Attribute 8: UserExtension1: Org_DropDown:

Code1: ORG_FreeText: ORG_Numeric: ORG_TextArea:

☐ Checkbox ☐ ORG_Checkbox ORG_Date:

☒ Exact Match Name ☒ Exact Match User ID ☒ Exact Match Reference Code

Results per Page: 25

Showing: 1 - 25 of 25

Name	User ID	Assignment ID	Job Title	Employee Number	E-mail	Current Status
100 User1	user1_100	user1_100-1				Active
ADMINISTRATOR System	ndadmin	ndadmin-1	ndadmin_n	ndadmin@netdimensions.com		Active

- **Organization Attributes as Manage > Users Filters**

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

[Organization Attributes >](#)

Edit Organization Attribute For ORG_Checkbox

Attribute Code *

ORG_Checkbox

Name ?

ORG_Checkbox

Type

Checkbox

Display areas

☒ User Search Criteria

☐ Organization Maintenance

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

Users

HIDE FILTERS

First Name: Last Name: User ID: Assignment ID:

Logical Domain: Organization: Job Title: Employee Number:

E-mail: Role: Status: User Group:

User Attribute 1: User Attribute 8: UserExtension1: Org_DropDown:

Code1: ORG_FreeText: ORG_Numeric: ORG_TextArea:

☐ Checkbox ☐ ORG_Checkbox ORG_Date:

☒ Exact Match Name ☒ Exact Match User ID ☒ Exact Match Reference Code

Results per Page:

Showing: 1 - 25 of 25

Name	User ID	Assignment ID	Job Title	Employee Number	E-mail	Current Status
100 User1	user1_100	user1_100-1				Active
ADMINISTRATOR System	ndadmin	ndadmin-1		ndadmin_n	ndadmin@netdimensions.com	Active

Permissions on User Attribute Extension Values

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

Read Permission

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

Unrestricted Permission

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

User Attribute Extension >

Create/Edit Entries for "user attr ext 1"

Code*	Name*	Permissions...
user attr ext 1 value 1	user attr ext 1 value 1 displayName	<input type="button" value="Permissions..."/>
user attr ext 1 value 2	user attr ext 1 value 2 displayName	<input type="button" value="Permissions..."/>
user attr ext 1 value 4	user attr ext 1 value 4 displayName	<input type="button" value="Permissions..."/>
user attr ext 1 value 4 mod	user attr ext 1 value 4 displayName	<input type="button" value="Permissions..."/>
user attr ext 1 value 6		<input type="button" value="Permissions..."/>

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

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

User Data Loader

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

User Groups

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

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

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

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

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

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

NetDimensions Talent Suite Manage Center YEUNG Kiu-Nei Logout

OVERVIEW LEARNING TALENT COMMUNICATE USERS REPORTS SYSTEM

User Groups

User Group Name: User Group Description:

Created from: To: Updated from: To:

☒ Show only the groups I created

Filter **Reset**

Results per Page: 25

Showing: 1 - 1 of 1

Print **+ Create User Group**

User Group Name	User Group Description	Created by	Creation Date	Last Updated By	Last Updated
Lannisters	The Lannister Family	CASEY Tim (netd_yk)	Aug 21, 2017 5:33 PM HKT		

Showing: 1 - 1 of 1

NetDimensions

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

Creating User Groups

When creating a User Group, you can specify:

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

The screenshot shows the 'New User Group' form in the NetDimensions Talent Suite Manage Center. The form includes a header with navigation tabs (OVERVIEW, LEARNING, TALENT, COMMUNICATE, USERS, REPORTS, SYSTEM) and a user profile (YEUNG Kiu-Nei, Logout). The form fields are: 'User Group Name*' (text input), 'User Group Description' (text area), and 'Logical Domain' (dropdown menu set to 'Global Default'). Below these fields is a list of five criteria with expandable arrows: 'Users/Organization/Role', 'Employment Information', 'Job Profiles & Competencies', 'User Attributes', and 'Organization Attributes'. At the bottom of the form are 'Save' and 'Print' buttons. The NetDimensions logo is visible in the footer.

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

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

Users/Organization/Role

▼ Users/Organization/Role

User

0 selected

...

Role

Organization

☐ Selected organizations only
 ☒ Selected and their suborganizations

Employment Information

Criteria	Description
(User Account) Status	Status of the User Accounts
Employee Num *	Employee ID Numbers
Date of Birth After	With Dates of Birth after this date
Date of Birth Before	With Dates of Birth before this date
Language	Language used
Job Title *	Job Title
Join Date After	With Join Dates after this date
Join Date Before	With Join Dates before this date
Direct Appraiser	Direct Appraiser
Super Appraiser	Super Appraiser
Expiration Date After	With Expiration Dates after this date
Expiration Date Before	With Expiration Dates before this date
HR Manager Name	Name of the HR Manager
Manager Name	Name of the Manager
Location Code *	Location Code
Department ID *	ID of the Department
Department Name	Name of the Department

Employment Country	Country where the employment is located
City	City
Province/State	Province / State
Country	Country
Cost Center Name	Name of the Cost Center
Cost Center *	Cost Center
Note: * Multiple input values are allowed that need to be separated by ";".	

► Users/Organization/Role

▼ Employment Information

Status <input type="text"/>	Employee Num* <input type="text"/>	Date of Birth After e.g Aug 21, 2017	Date of Birth Before e.g Aug 21, 2017
Language All ▼	Job Title* <input type="text"/>	Join Date After e.g Aug 21, 2017	Join Date Before e.g Aug 21, 2017
Direct Appraiser <input type="text" value="Search for a user"/>	Super Appraiser <input type="text" value="Search for a user"/>	Expiration Date After e.g Aug 21, 2017	Expiration Date Before e.g Aug 21, 2017
HR Manager Name <input type="text"/>	Manager Name <input type="text"/>	Location Code* <input type="text"/>	Department ID* <input type="text"/>
Department Name <input type="text"/>	Employment Country <input type="text" value="▼"/>	City <input type="text"/>	Province/State <input type="text"/>
Country <input type="text" value="▼"/>	Cost Center Name <input type="text"/>	Cost Center* <input type="text"/>	

Note: Fields marked by * may have multiple values delimited by ";"

► Job Profiles & Competencies

► User Attributes

► Organization Attributes

Job Profiles & Competencies

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

▼ Job Profiles & Competencies

Job Profile

Competencies

Users should meet Any ▼ of the following Competency criteria:

Selected Competencies:

Name	From Proficiency Level	To Proficiency Level	
Programming	1 - Poor ▼	3 - Good ▼	

User Attributes

▼ User Attributes

Edit Attribute 1 Targets

Edit Attribute 8 Targets

Loyalty

Select ▼

Remarks

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

Organization Attributes

The Administrators can select organizational attributes as targets, meaning the Users belonging to an organizational level that has one of these attributes are to be evaluated as members in that User

Group.

This can be done in the User Group editor, under the Organization Attributes section.

User Groups >

Edit user group

User Group Name

Original Domain

▶ User Attributes

▼ Organization Attributes

☐ 'Attribute 1' contains

☐ 'Attribute 2' contains

☐ 'Attribute 3' contains

Editing User Groups

1. Go to **Manage Center > USERS > GROUP AND ORGANIZATION > User Groups**.
2. The *User Groups* page appears. Click the User Group you want to modify.

User Groups

The list below indicates user groups available to you.

Search text:

☒ Show only the groups I created

User Group Name	Created by	Creation Date	Last Updated By	Last Updated
California	MOLINA Alon (alon)	Sep 14, 2013 1:48 PM GMT+08:00		

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

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

Edit user group

User Group Name
Test UG 001

Logical Domain
Marketing Demo

Usage in Course Auto-Enroll: 0

Created by: SAPLALA Katrina (netd_katrina)

Creation Date: Jun 18, 2015 4:04 AM CDT

Last Updated By: (not specified)

Last Updated: (not specified)

- Users/Organization/Role
- Employment Information
- Job Profiles & Competencies
- User Attributes
- Organization Attributes

Save **Permissions...** **Delete**

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

Deleting User Groups

1. Go to **Manage Center > USERS > GROUP AND ORGANIZATION > User Groups**.
2. The *User Group* page appears. Click the user group you want to remove

User Groups

The list below indicates user groups available to you.

Search Text

☐ Show Only The Groups I Created

Filter

+ Create New User Group...

Group Name	Created By	Creation Date	Last Updated By	Last Updated
Sales	MOLINA Alon (netdalon)	Jan 16, 2013 3:09 PM GMT+08:00		

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

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

Edit user group

User Group Name:

Logical Domain:

Usage in Course Auto-Enroll:

Created by: SAPLALA Katrina (netd_katrina)

Creation Date: Jun 18, 2015 4:04 AM CDT

Last Updated By: (not specified)

Last Updated: (not specified)

- Users/Organization/Role
- Employment Information
- Job Profiles & Competencies
- User Attributes
- Organization Attributes

Save **Permissions...** **Delete**

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

User Group Permissions

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

1. Go to **Manage Center > USERS > GROUP AND ORGANIZATION > User Groups**.
2. The *User Group* page appears. Click the user group whom the permission will be set.

User Groups

The list below indicates user groups available to you.

Search Text:

☒ Show Only The Groups I Created

Filter

+ Create New User Group...

Group Name	Created By	Creation Date	Last Updated By	Last Updated
Sales	MOLINA Alon (netdalon)	Jan 16, 2013 3:09 PM GMT+08:00		

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

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

Edit user group

User Group Name
Test UG 001

Logical Domain
Marketing Demo ▼

Usage in Course Auto-Enroll: 0

Created by: SAPLALA Katrina (netd_katrina)

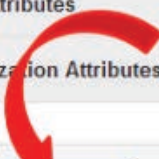
Creation Date: Jun 18, 2015 4:04 AM CDT

Last Updated By: (not specified)

Last Updated: (not specified)

- Users/Organization/Role
- Employment Information
- Job Profiles & Competencies
- User Attributes
- Organization Attributes

Save **Permissions...** **Delete**



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

Permission Selector

Use the links below to select the users, user groups, organizations, and roles that can access this object.

Read Only Access **Unrestricted Access**

Users

SAPLALA Katrina (NETD_KATRINA)

In addition to the previously selected users, view permissions will be granted to anyone who meets

☐ All of the following criteria

☒ One of the following criteria

Add criteria selector:

User Group ▼ **Go**

Save **Close**

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

b. Write Access

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

Permission Selector

Use the links below to select the users, user groups, organizations, and roles that can access this object.

Read Only Access Unrestricted Access

Users

SAPLALA Katrina (NETD_KATRINA)

In addition to the previously selected users, view permissions will be granted to anyone who meets

☐ All of the following criteria

☒ One of the following criteria

Add criteria selector:

User Group Go

Save Close

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

Selector

User ID First Name Last Name

Role Organization User Group

All

Specify Additional Attributes UserID Direct Entry Form

Search Reset

Results: 0

Selected: 1

SAPLALA Katrina (NETD_KATRINA)

Horizontal View

OK Cancel

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

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

Permission Selector

Use the links below to select the users, user groups, organizations, and roles that can access this object

Read Only Access Unrestricted Access

Users

SAPLALA Katrina (NETD_KATRINA)

In addition to the previously selected users, view permissions will be granted to anyone who meets

☐ All of the following criteria

☒ One of the following criteria

Add criteria selector:

User Group Go

Save Close

- **All of the following criteria**

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

- **One of the following criteria**

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

- **Add criteria selector**

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

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

Organization Attribute Criteria in User Selector

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

Selector

User ID	First Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Role	Organization	User Group
<input type="text" value="All"/>	<input type="text"/>	<input type="text"/>
Assignment ID		
<input type="text"/>		

 Hide additional attributes
  UserID Direct Entry Form

▸ Employment Information

▸ Job Profiles & Competencies

▸ User Attributes

▼ Organization Attributes

☐ 'Attribute 1' contains

☐ 'Attribute 2' contains

☐ 'Attribute 3' contains

Multiple Value Entry for Employment Information Selection Criteria

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

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

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

The screenshot shows the NetDimensions Talent Suite web application in a browser window. The address bar displays the URL: `localhost:8800/ekp102/servlet/ekp?TX=EDITUSERGROUP&GROUPID=EKP0000076028&MYGROL`. The page title is "NetDimensions Talent Suite".

Under the "Organization" section, there are two radio buttons: "Selected organizations only" and "Selected and their suborganizations". Below them is a text box containing "ALL/NetDimensions".

The "Employment Information" section contains the following fields:

- Job Title*: Accountant;Administrator
- Employee Number*: [Empty]
- Location Code*: [Empty]
- Department ID*: [Empty]
- Department Name: [Empty]
- Cost Center*: 123;456;789
- Cost Center Name: [Empty]
- Language: All (dropdown menu)
- Join Date Start: (not specified)
- Join Date End: (not specified)
- Direct Appraiser: Search for a user
- HR Manager Name: [Empty]
- Manager Name: [Empty]

A note states: "Note: Fields marked by * may have multiple values delimited by ','".

Below the Employment Information section are two expandable sections: "Job Profiles & Competencies" and "User Attributes".

At the bottom of the form are three buttons: "Save", "Permissions...", and "Delete".

Assignment Code Available in Report Wizard

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



Select the columns you wish to include in your report.

Expand All

▶ User Statistics

▶ Employment Information

▼ User Properties

☐ Assignment Code

☐ Cost Center

☐ Cost Center Name

☐ Creation Date

☐ Expiration Date

☐ First Name

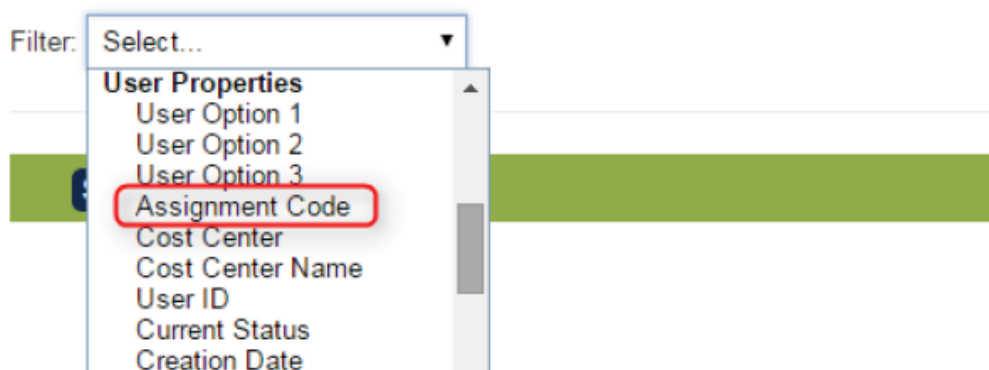
☐ Gender

☐ HR Manager E-mail

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



Select the criteria by which your records will be returned.



Aggregate Training Across Assignments in Report Wizard

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

▼ User Groups

☐ ID
☐ User Group Name

▼ External Training Records

☐ Additional Comments
☐ Duration Unit
☐ Score

☐ Assignment Learning
☐ End Date
☐ Start Date

☐ Duration
☐ Grade
☐ Status

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

Properties Columns Grouping Order Filters Summary

Save Undo

Select the criteria by which your records will be returned.

Filter:

Columns	Operators	Values	
External Training Records-Assignment Learning	Equals	Yes	<div>Delete</div> <div>Edit</div>

Save Undo

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

Date Run: Oct 30, 2014 5:50 PM CST

Time Zone: China Standard Time

User Properties-User ID	External Training Records-Start Date	External Training Records-Status	External Training Records-Assignment Learning
ndadmin	Oct 29, 2014 12:00 AM	Completed	Yes

Close

Back

Print

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

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

User ID Migration

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

The screenshot shows the 'User ID Migration' page in the NetDimensions Talent Suite. The top navigation bar includes 'Manage Center' and 'Logout'. Below the navigation bar, the 'USERS' tab is selected. The main content area is titled 'User ID Migration' and contains the following elements:

- A description: 'Select a source and a target user ID to migrate records. All of the source user's current records (but not preferences and basic properties) are added to the target ID records and all source records and ID removed.'
- Input fields for 'Source User ID:' and 'Target User ID:'.
- A checkbox labeled 'Migrate ownership records only:' which is currently unchecked.
- A section titled 'After migration:' with three radio button options:
 - ☒ Leave the source user account unchanged.
 - ☐ Delete the source user account
 - ☐ Change the status of the source user account to migrated
- An 'Execute' button.

The Function has the following settings:

Property	Description
Source User ID	The source user account that records should be migrated FROM
Target User ID	The target user account that records should be migrated TO

Migrate ownership records only	<p>If checked, only the ownership of the following records will be migrated:</p> <ul style="list-style-type: none"> • Exams • Bookmarked reports (Dashboard), Standard reports, and Report wizard reports • Repository files • User groups • Scheduled tasks and reports <p>If unchecked, the migration will transfer records from the source account to the target account. These records exclude Preferences and Basic Properties and include:</p> <ul style="list-style-type: none"> • Notebooks • Withdrawal reasons • Forum posts • Exam, Article, and Bulletin ownerships • Bookmarked reports (Dashboard), Standard reports, Report wizard reports, and Received scheduled reports • Homework files (uploaded and received), Batch report files, Repository files, and Uploaded files • Surveys • Instructor comments • Exam attempts • Accounting, Payment, and Approval records • Training records (including CMI data and SCORM global objectives) • Messages received/sent • Supervisions • Instructors • Certifications • Training plan • External mail messages • Email templates • External training • Custom attributes • Competency awards and assignments • Scheduled tasks • Optional payment items • Associated organizations • Organization memberships • User appraisals (as appraiser/appraisee) • User groups (ownership and membership) • Instructor assignments • Job profiles • Course contact lists
After migration:	<p>One of the options below:</p> <ul style="list-style-type: none"> • Leave the source user account unchanged. • Delete the source user account • Change the status of the source user account to migrated

Click **Execute** to perform the migration.