Recruit, Develop, Perform, Reward

NetDimensions LMS 15.1

Learning Objects

An overview of Learning Object Administration in NetDimensions LMS 15.1

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Legal Notices

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Introduction

Courses are modeled in the LMS using Learning Objects, also known as Modules or Learning Modules. The LMS supports the following learning object types:

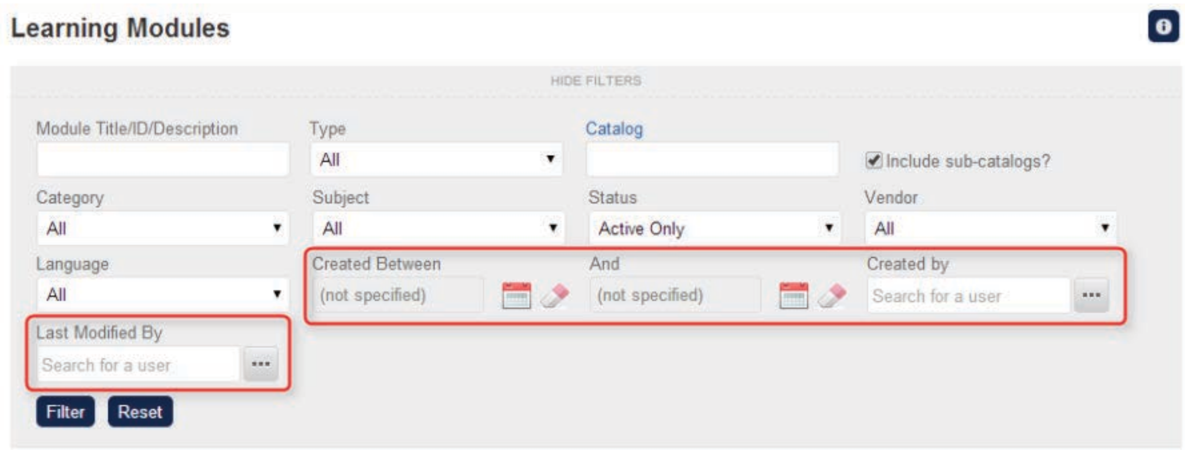
Learning Type	Description
Book	Library book materials for reference and review
CD ROM	Library CD materials for reference and review
Classroom	A classroom offering with multiple sessions and locations
Coaching	Displays reference materials and associated exams in sequential order in the main tab of the Knowledge Center
External Certification	A launchable AICC-compliant test that may be associated with a specific certification as the requirement test
External Course	A course offered external to this on-line system, but for which administrator's want to track registration and course time, location and availability
Just-in-time Learning	Quick to learn material available via a hyperlink on another system (or on the web)
Program	A collection of learning modules, while being a learning object itself
Self Training (Paper and Video)	Used to set up self training courses instead of SCORM or AICC for self training qualifications
Special Interest Group	Used to separate a specific group of courses from online learning type
Online	A typical on-line learning module launchable over the internet/intranet
On the Job Training	Enhanced for clients who would like to supervise the performance of users after they've completed the on the job training
Video materials for reference and review	Video materials for reference and review
Virtual Classroom	An integrated link to scheduled virtual classroom session (typically from a HorizonLive VC server)
Virtual Classroom (Archived)	A recorded virtual classroom sessions that may be accessed for direct playback
Workshop/Seminar	Represents workshop sessions that might be hands-on type session or labs
Task	lightweight learning objects. It is suitable to track on-the-job "snippets" of training.

Manage Learning Modules

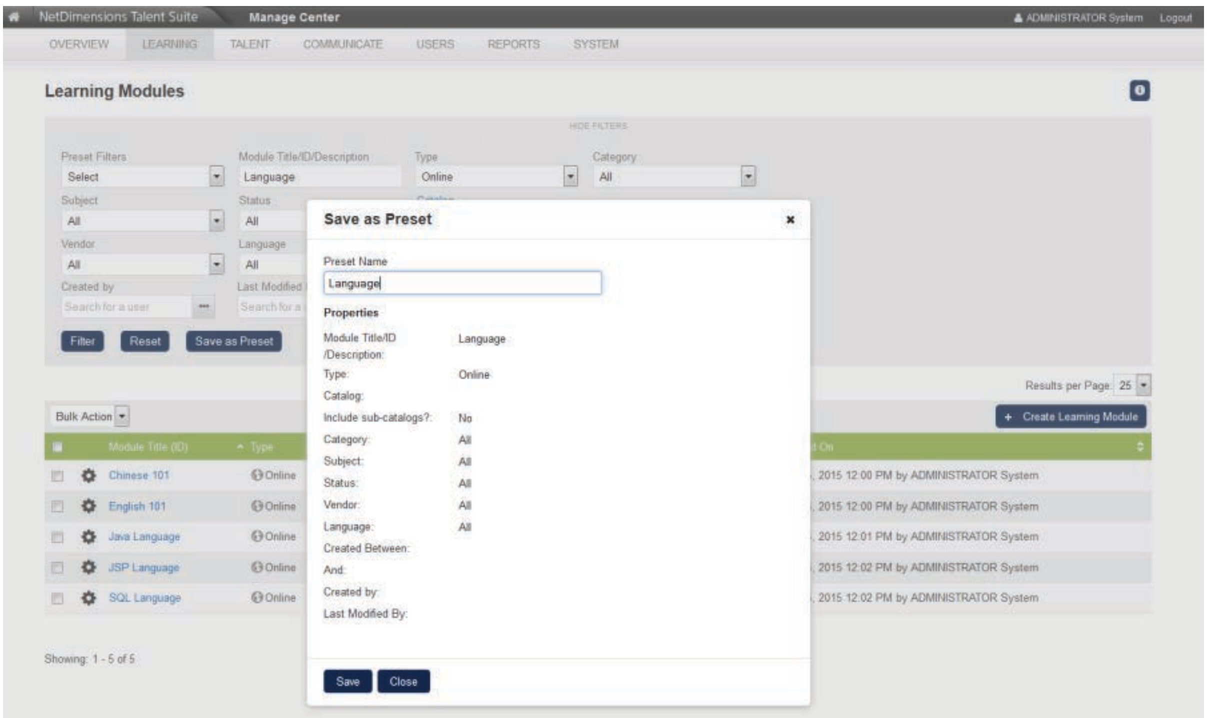
Learning Objects are managed at **Manage Center > Learning > Catalog General Settings > Learning Modules**

Learning Modules Filters

You can filter for learning modules based on the following criteria:



For filters that will be used repeatedly, you can save the filter as a Preset and load quickly under Preset Filters:



You can also use the following syntax to perform more advanced searches:

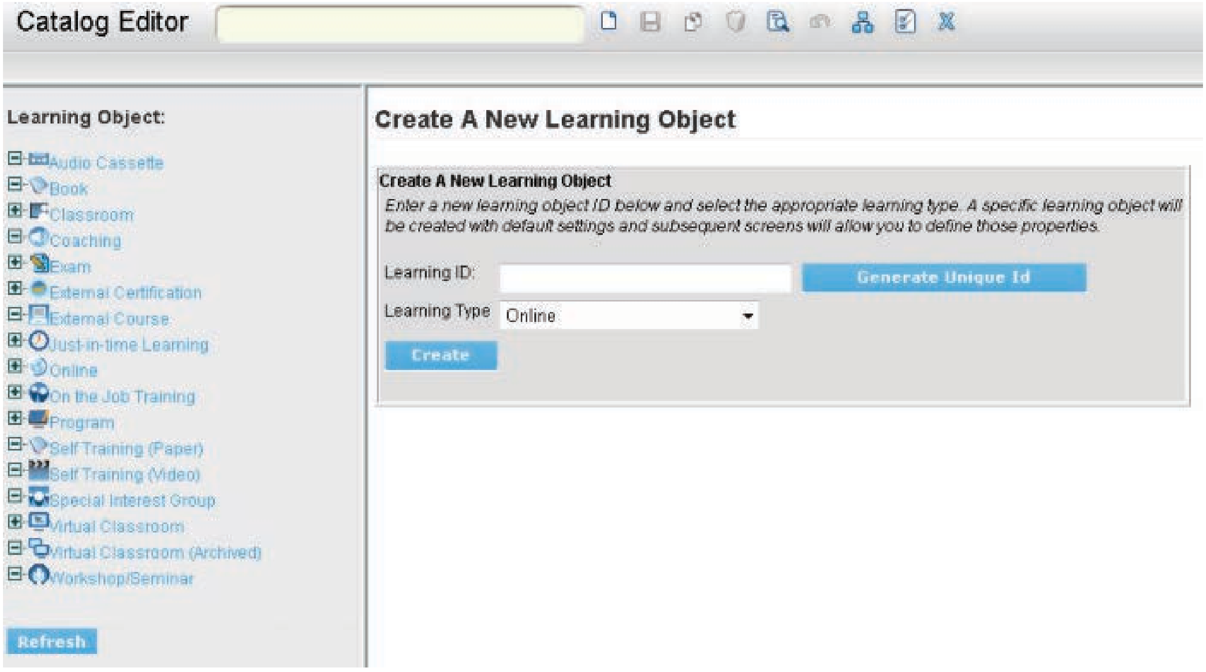
Operator Example	Finds learning objects containing?
online Training	Any modules matching **"online"** or **"training"** (case insensitive)

"Online Training"	Any modules matching **"Online Training"** exactly, in a single field (excluding case-sensitivity)
Online -Training	Any modules matching **"Online"** but not **"Training"**
Online +Training	Any modules matching **"Training"**, modules that also match **"Online"** will rank higher in the results
(Online OR Training) AND course	Any modules matching **"course"** and either **"Online"** or **"Training"** (parentheses can be used as grouping)
"Online Training"~2	Any modules matching **"Online Training"** within 2 words, in a single field
com*r	Any modules with properties starting with **"com"** and ending with **"r"**, where the asterisk (*) is a wildcard for any number of characters e.g. **"comr"**, **"computer"**
te?t	Any modules with properties starting with **"te"** and ending with **"t"**, where the question mark (?) is a wildcard for a single character e.g. **"test"**, **"text"**
description:http\:\/\/xyz.com	Any modules with description containing **" http://xyz.com "** where **"\"** is the escape character and should be inserted before any reserved characters like **"/"**. Examples of other field specific search terms: • title:java • objective:introduction • id:MOD001 • referenceno:REF123 • vendorDesc:*Solution • audience:(begin* OR mid*) • price:HKD*

- You can define the fields to search for (the last example). The fields supported in Catalog Search include ***title*** , ***description*** , ***objective*** , ***id*** and ***reference number*** . Please take care to spell the names of these fields correctly. If they are misspelled, no result will be returned.
- ***id*** is default to be searched with wildcard.
- You can boost the importance of a specific search term by using ^5 (or other positive values). By default, the boosting factor is 1 for all terms. If you would like to suppress a term, don't use negative values; use a value between 0 and 1 (for example, 0.2).
- The search results presented are sorted according to the scores, with the most relevant learning modules ranked first.
- If you enter "classroom" (without quotes) as the search term and there are catalog entries containing the text "classroom", "classroom1" and "classroom2" respectively, only the entry containing the text "classroom" will be returned. If you would like the results to include all three learning modules, use "classroom*" (without quotes) as the search term.

Creating Learning Objects

When you create a new Learning Object, you can enter a Learning ID or use the "Generate Unique ID" function. The function generates sequential IDs based on the format defined in "Course ID Generator Format" System Configuration. It follows the standard DecimalFormat convention for allowed values, thus enabling the format to have standard prefixes, a variable number of digits, etc.

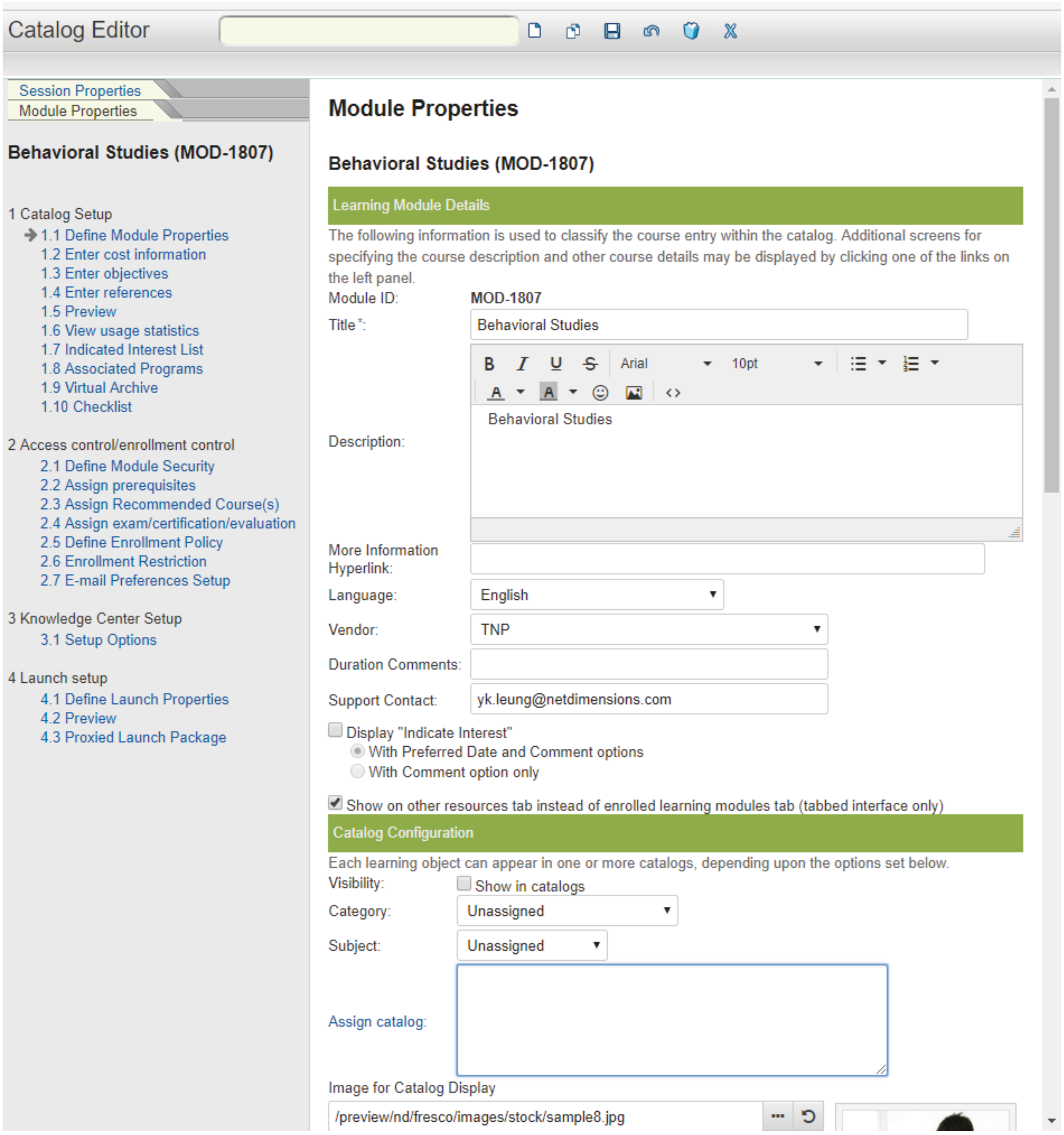

Catalog Editor
Learning Object:
Audio Cassette
Book
Classroom
Coaching
Exam
External Certification
External Course
Just-in-time Learning
Online
On the Job Training
Program
Self Training (Paper)
Self Training (Video)
Special Interest Group
Virtual Classroom
Virtual Classroom (Archived)
Workshop/Seminar
Refresh
Create A New Learning Object
Create A New Learning Object
Enter a new learning object ID below and select the appropriate learning type. A specific learning object will be created with default settings and subsequent screens will allow you to define those properties.
Learning ID:
Generate Unique Id
Learning Type
Online
Create

Module Properties

Learning Module Details

Each learning object has the following basic properties:

Property	Description	Remark
Title	Title of the Module	-
Description	Description of the Module	-
More Information Hyperlink	Links related to the Module	-
Language	Language of the Module	-
Vendor	Vendor of the Module	-
Duration Comments	Comments regarding the length of the Module	-
Support Contact	Contact person for the Module. This information can be found at the Support Contact Information in the module's description page.	This field length can be up to 255 characters, supporting HTML tags, or direct links to write emails, etc.
Display "Indicate Interest"	Whether to conduct survey for the Module.	Two options are available: • With Preferred Date and Comment options • With Comment option only
Show on other resources tab instead of enrolled learning modules tab (tabbed interface only)	Whether to include this Tab (instead of the Enrolled Learning Modules tab) on the Home Pages to target any learning module (but not programs) that learners can enroll in.	This is typically for modules that function as reference resources, rather than as activities or tasks that the learner are expected to complete.



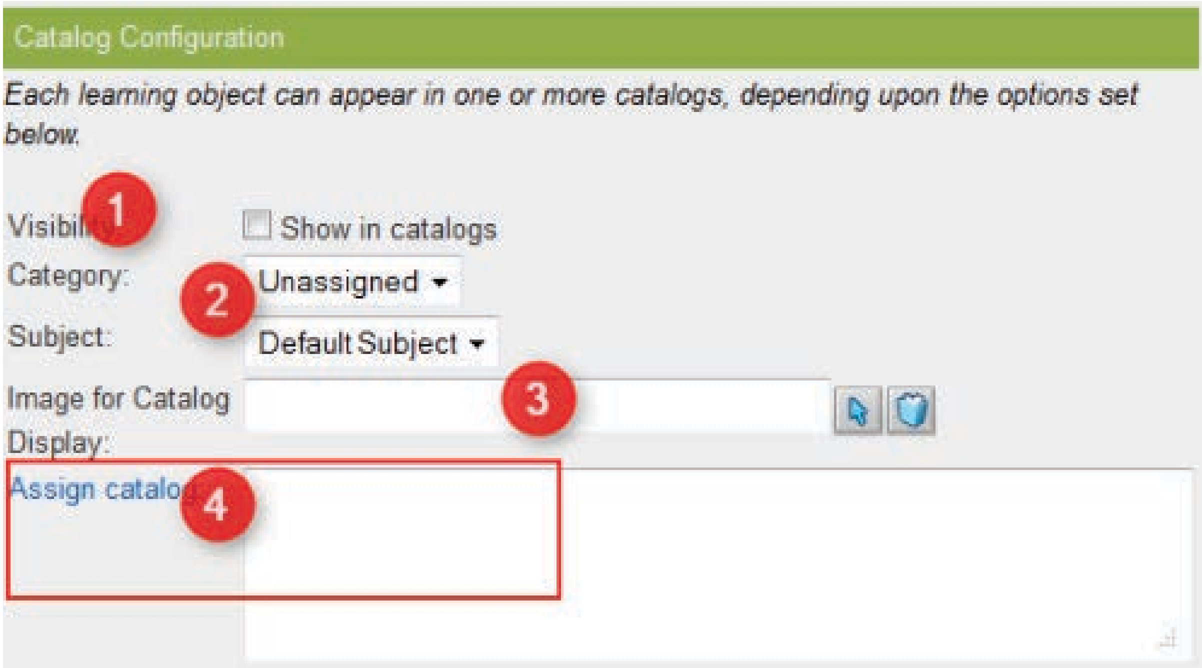
Audio Cassette-, Book-, CD- and Video Specific Properties

- Speaker/Author:
- Create Learning Objects
- Publisher/Institute
- Location:
- Reference No

Just-In-Time Specific Properties

- Speaker/Author
- Publisher/Institute

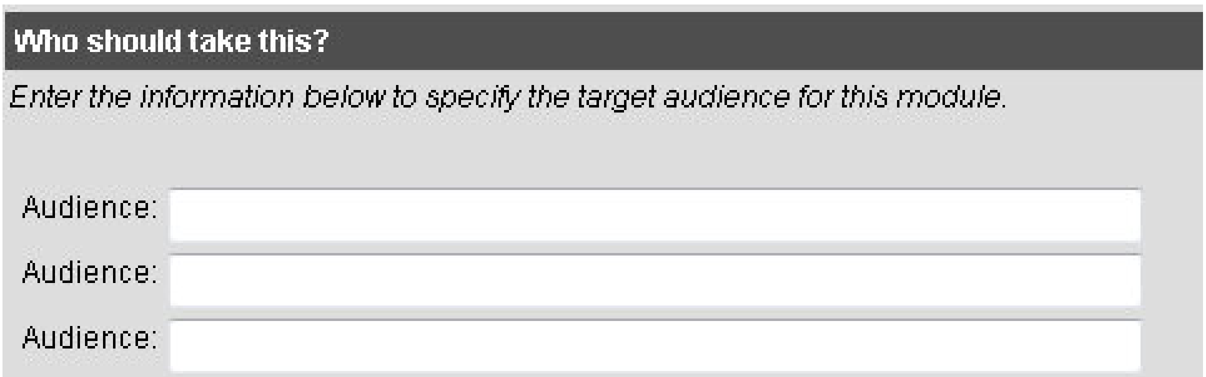
Catalog Configuration



1. To display this course in the **Search Catalog**, click on the box by the Show in Catalog field.
2. Select the **Category** and **Subject** by clicking on the drop-down menu.
3. Assign an image for catalog display. Click the **Selector** button to display the **Repository Manager** in the new window.
   Note: Images must be 150 x 150 pixels in size. Blank spaces of images smaller than 150x150 pixels need to be filled out.
4. Click **Assign Catalog** to assign catalog.

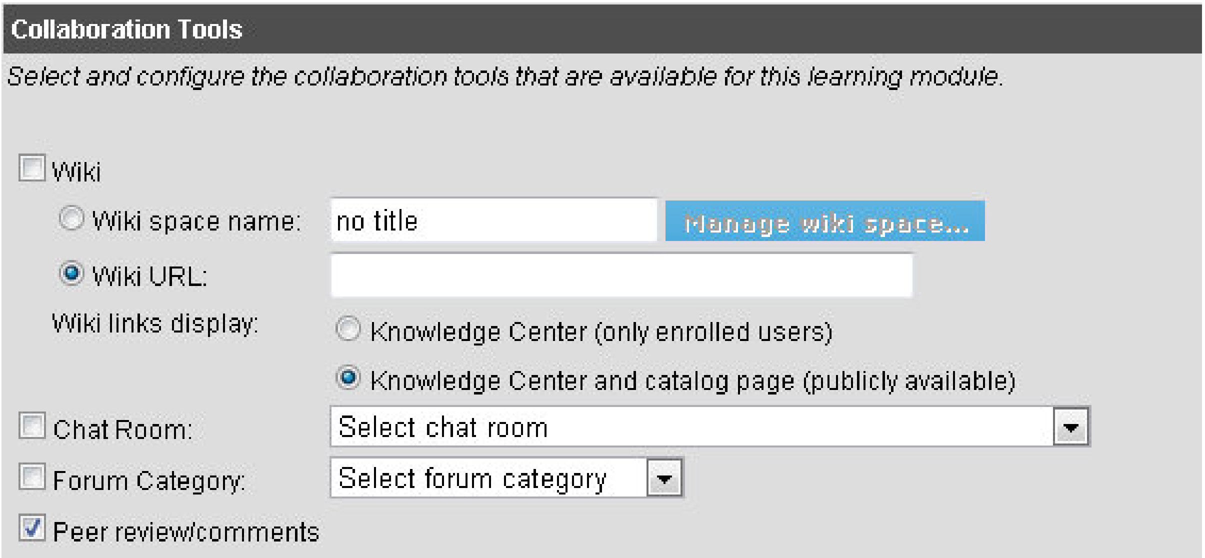
Audience

Enter the target audience(s) in the Audience field. Upon clicking the audience field, new audience field will be added.



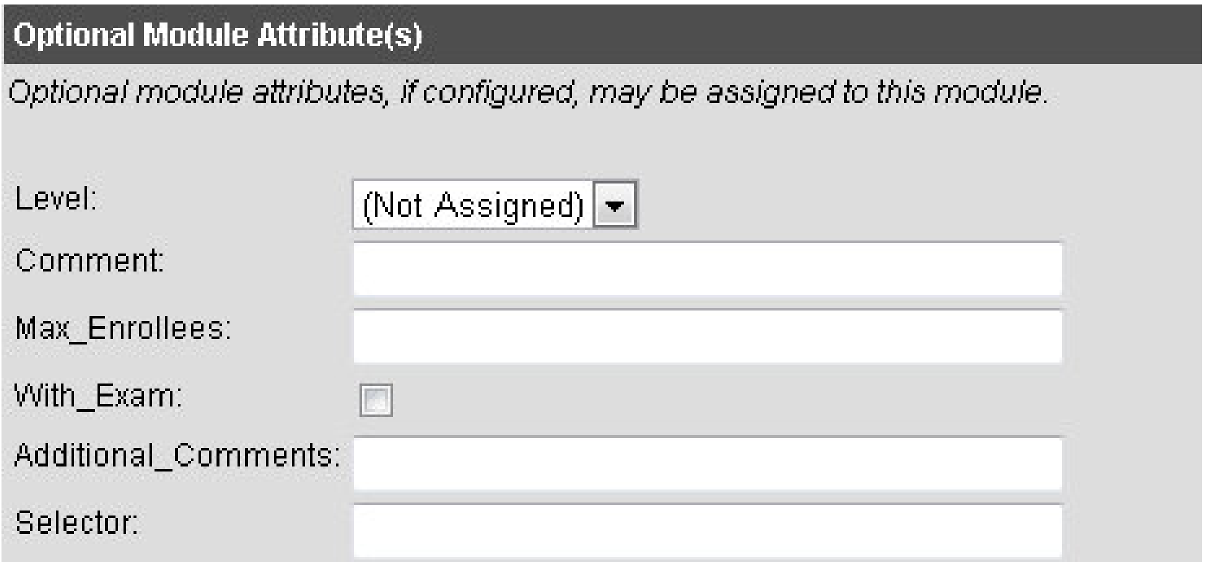
Collaboration Tools

1. Specify the **Wiki Space Name** or the **Wiki URL**.
2. Select the associated **Chat Room**.
3. Select the associated **Forum**.
4. To allow participants to comment on the course, click the **Peer Review/Comments** box.



Optional Module Attributes

If optional module attributes have been configured, you can enter values for the attributes:

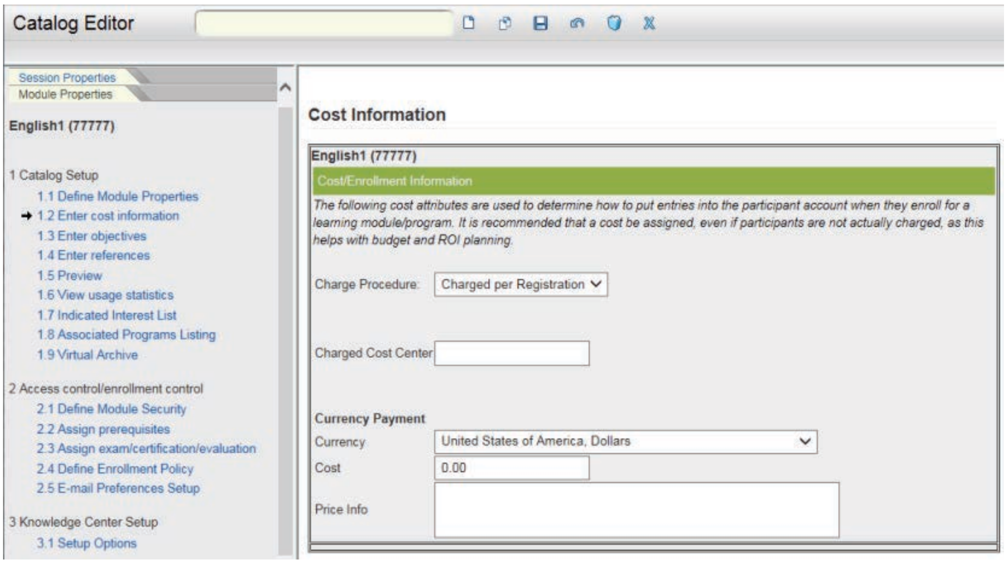


Enter Cost Information

To define Cost Information in the Catalog Editor, click on **Enter Cost Information** in the Catalog Editor.

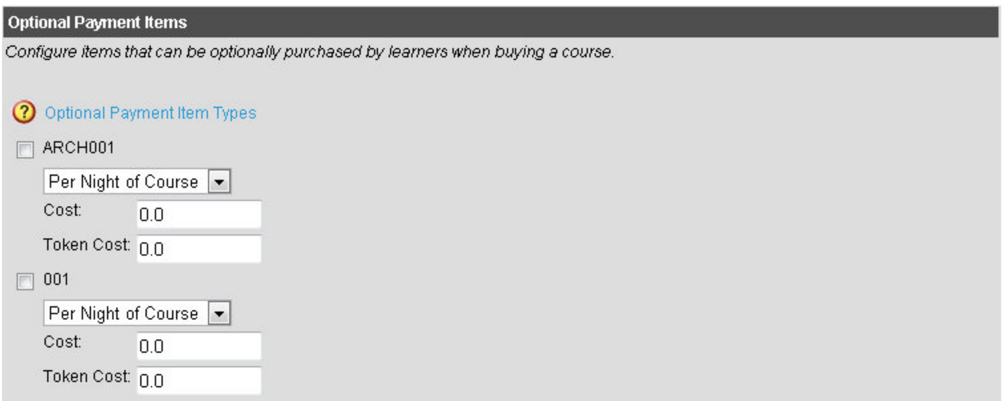
- The *Cost Information* screen appears. Enter details for the categories:
  - Cost/Enrollment Information
  - Optional Payment Items

In the Cost/Enrollment Information:



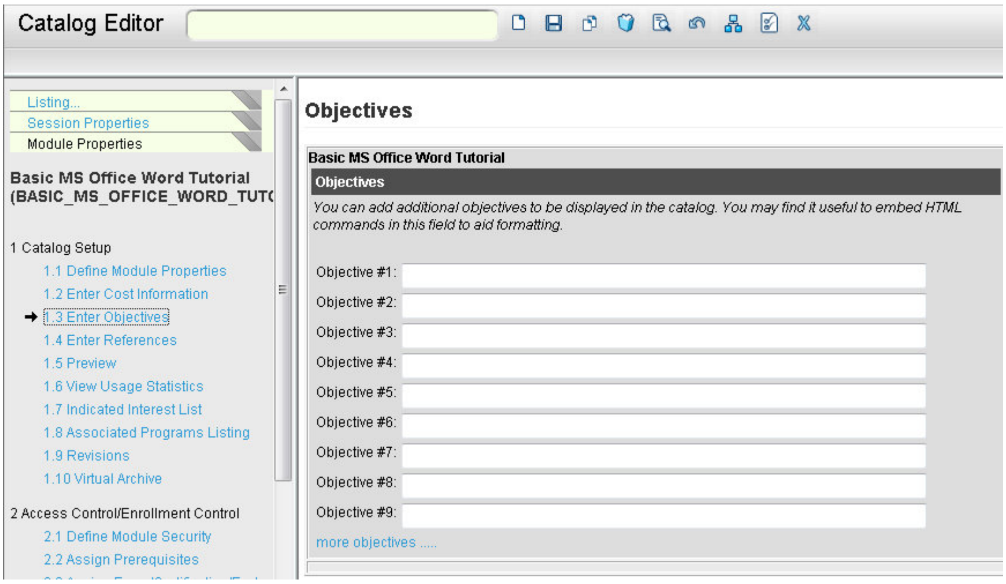
1. Select the Charge Procedure.
2. Enter Charge Cost Center. The Charge Cost Center field is used in case the costs should not be charged towards the employee's cost center. This field is available for both Module and Session Cost Information. Once specified in these settings, the cost center defined in the User Editor is overruled. Note: The Cost Center specified in Session Cost Information overrides the Cost Center specified in Module Cost Information.
3. Select the Currency. Note: You can set the default currency in System Configurations
4. Enter the amount in the Cost field.
5. Enter the pricing details in the Price Info field.
6. If token is use for payment, specify the cost in tokens and the price information
7. In the Optional Payment Items:

   - Select the type of payment.
   - Enter cost.
   - Enter token cost
   - Click the Save icon.



Enter Objectives

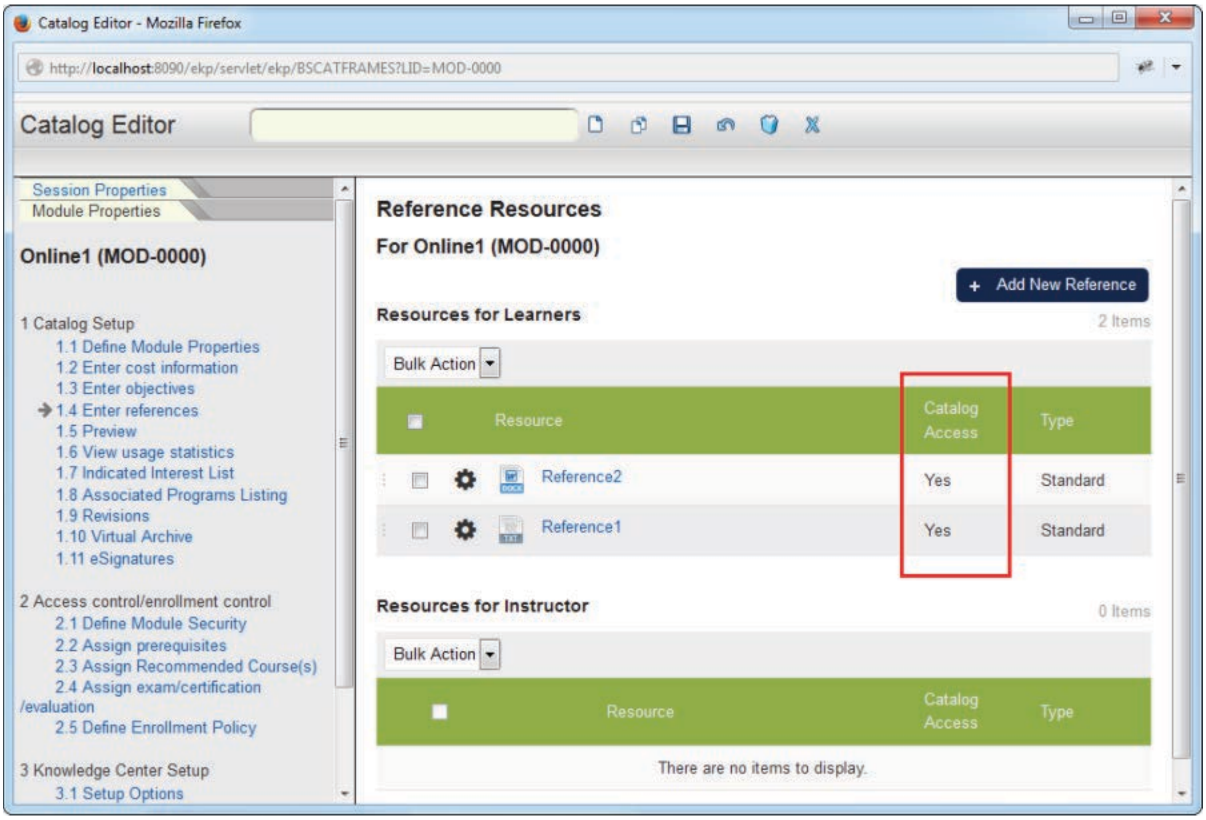
To specify objectives, click on **Enter Objectives** in the Catalog Editor. The *Objectives* screen appears.



- Specify the details in the Objective #1, Objective #2, Objective #3 , etc. fields
- Should you need more space to specify new additional objectives click the **more objectives** hyperlink. A new set of blank objective fields appears.
- Click the **Save** icon.

Enter References

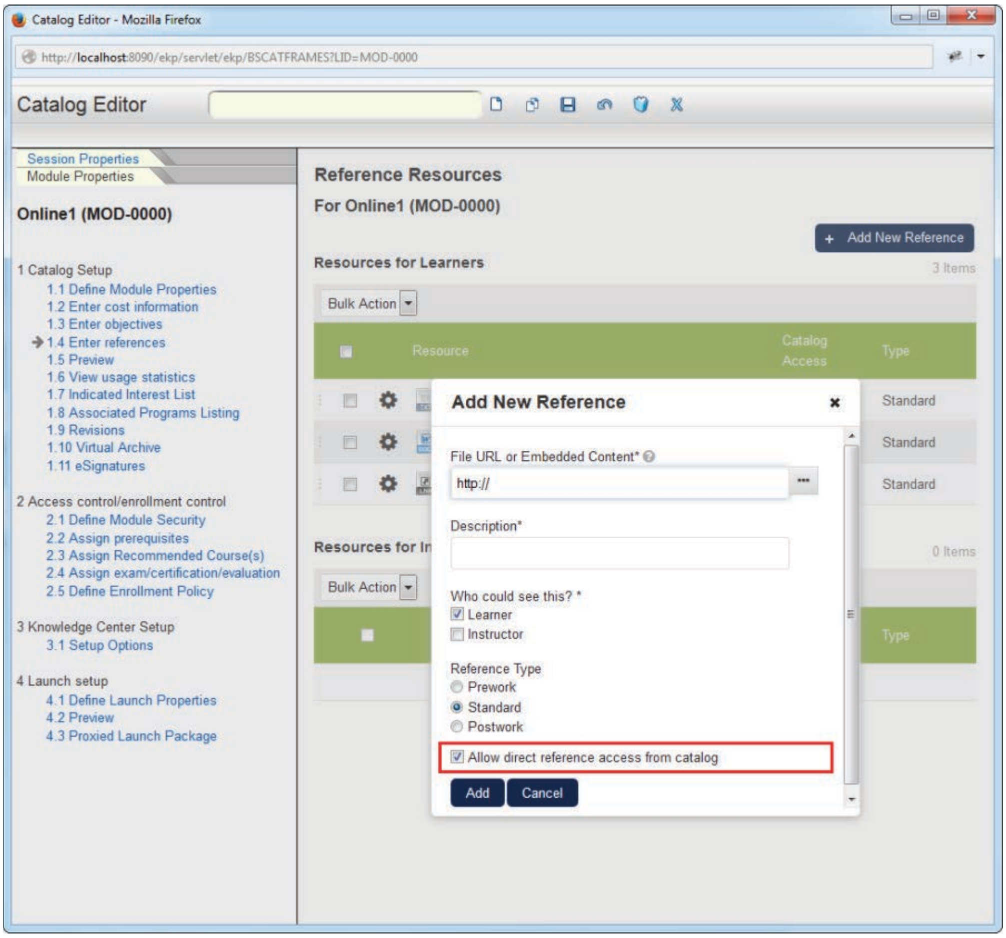
1. To enter reference resources, click **Enter References** on the left. Click + **Add New Reference**



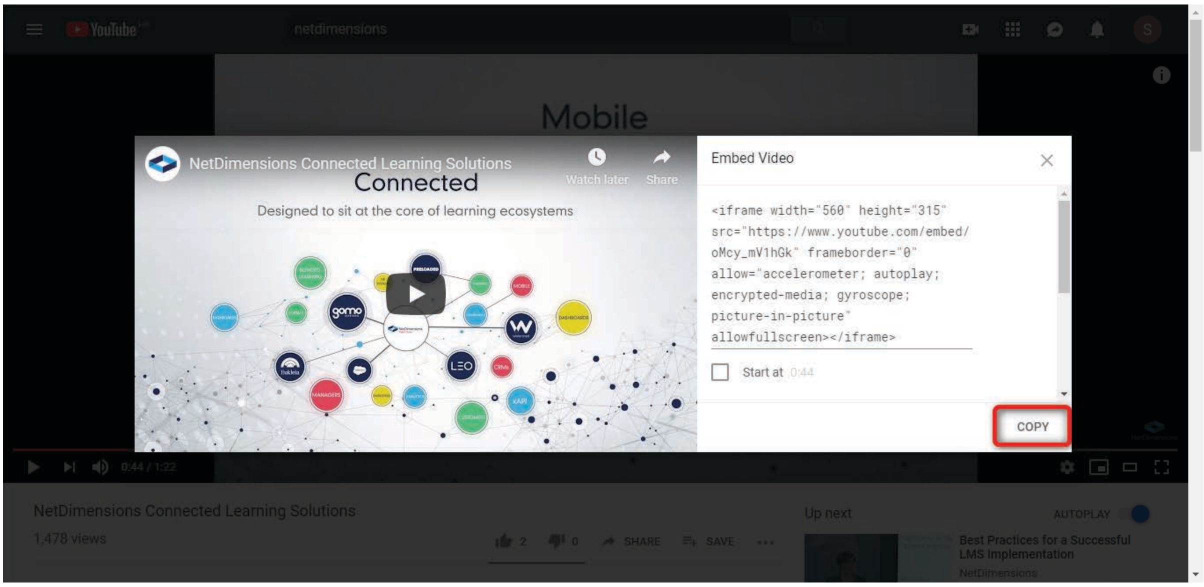
2. Fills in the necessary information in the overlay. The "Allow direct reference access from catalog" setting specifies whether that particular reference can be directly accessed from the catalog. Catalog Access of the Reference can also be enabled / disabled under the cog next to that reference resource.

3. The Reference can be:

- File URL
- File uploaded in the file repository
- Embedded Content (resource will be presented in an overlay)



If embedded content is to be used as reference materials, paste the embed code which usually can be copied from some source such as below

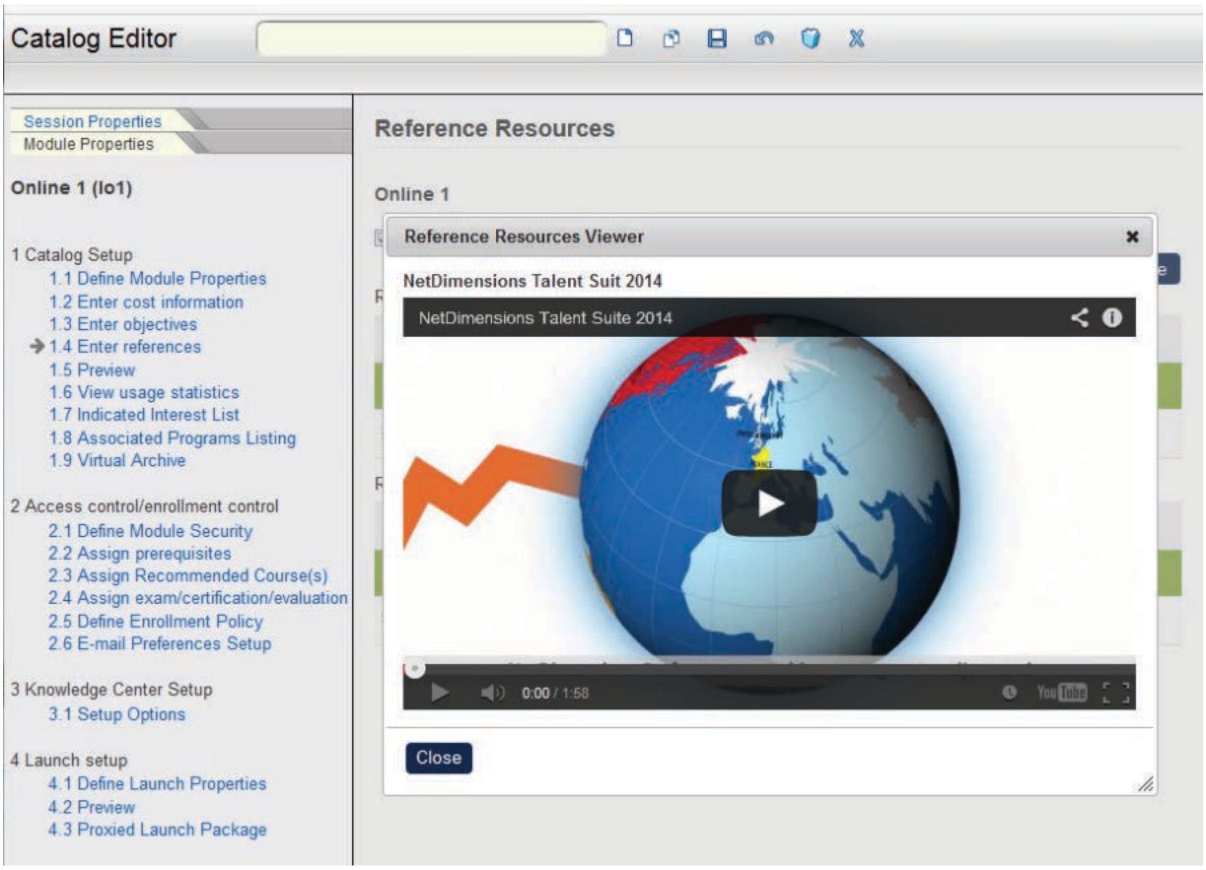


4. To preview the resource, either click the resource link or mouse over the cog icon next to the item and select "Preview". Embedded content can be previewed as a popup overlay; other resource file type will be shown in a new window.

5. To delete the resource, either use cog > delete to delete one item or select any check-boxes to do a bulk delete.

Learners can access reference resources at:

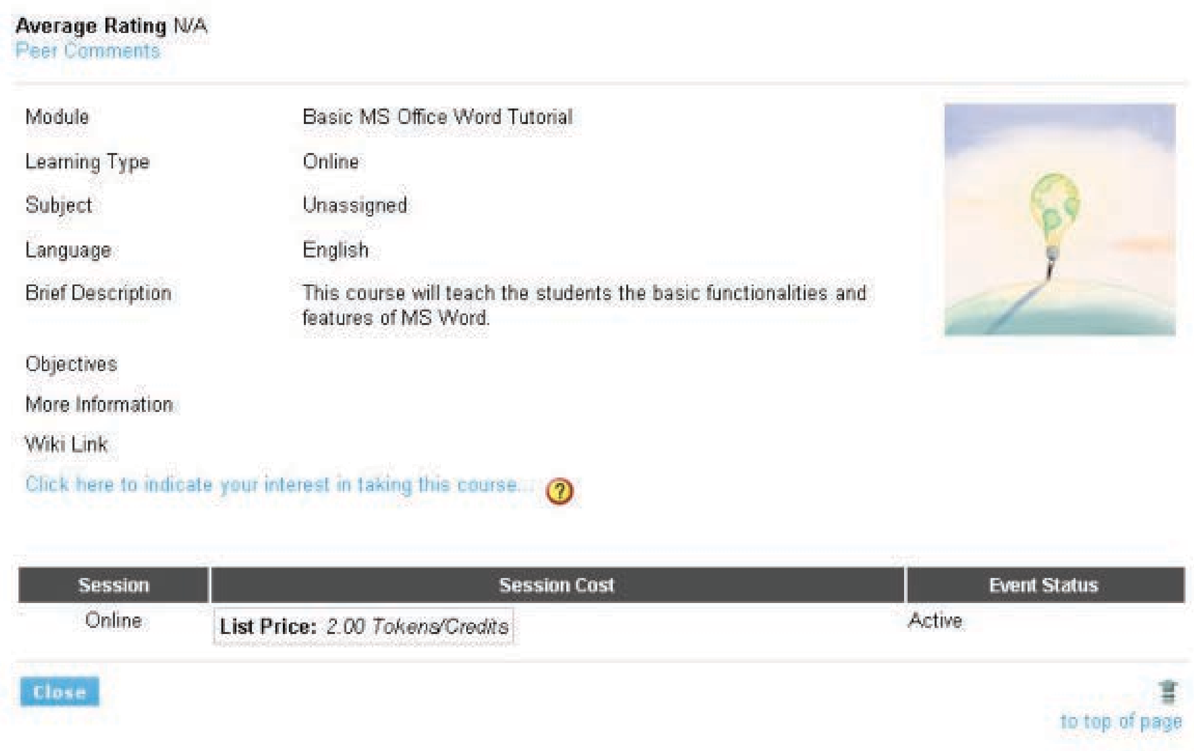
- Knowledge Center (Reference Resources Tab, Overview Tab, and under Active and Completed Modules)
- Records/Transcripts Detail
- Catalog Detail
- Task Approval
- Universal Search - Reference Resources
- Catalog Editor > 1.4 Enter references



Viewing embedded content on an overlay

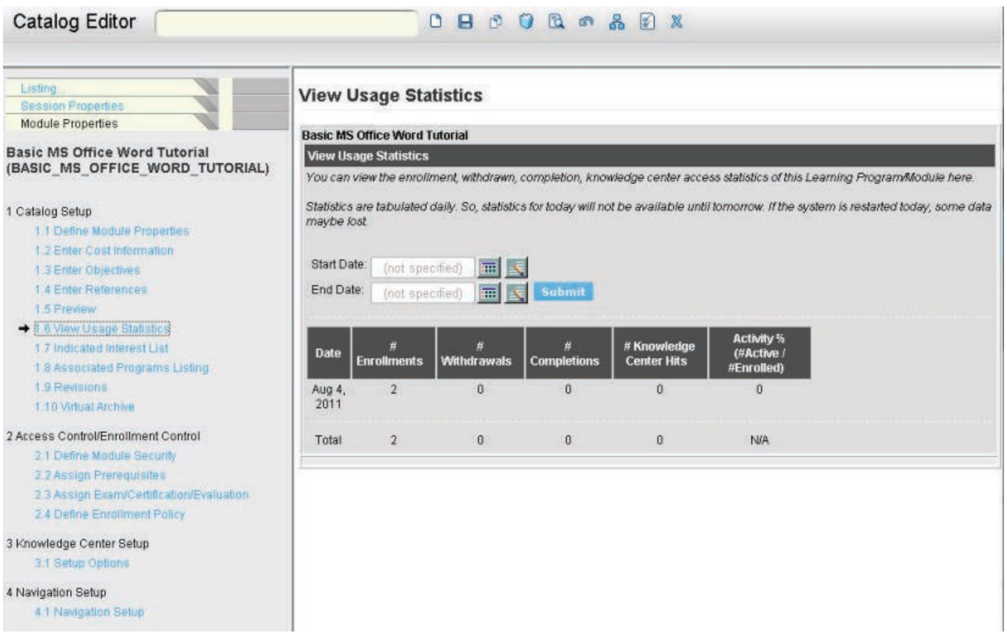
Preview

To preview the catalog entry, click the **Preview** in the Catalog Editor. The-learning object's catalog entry appears in a separate window.



Usage Statistics

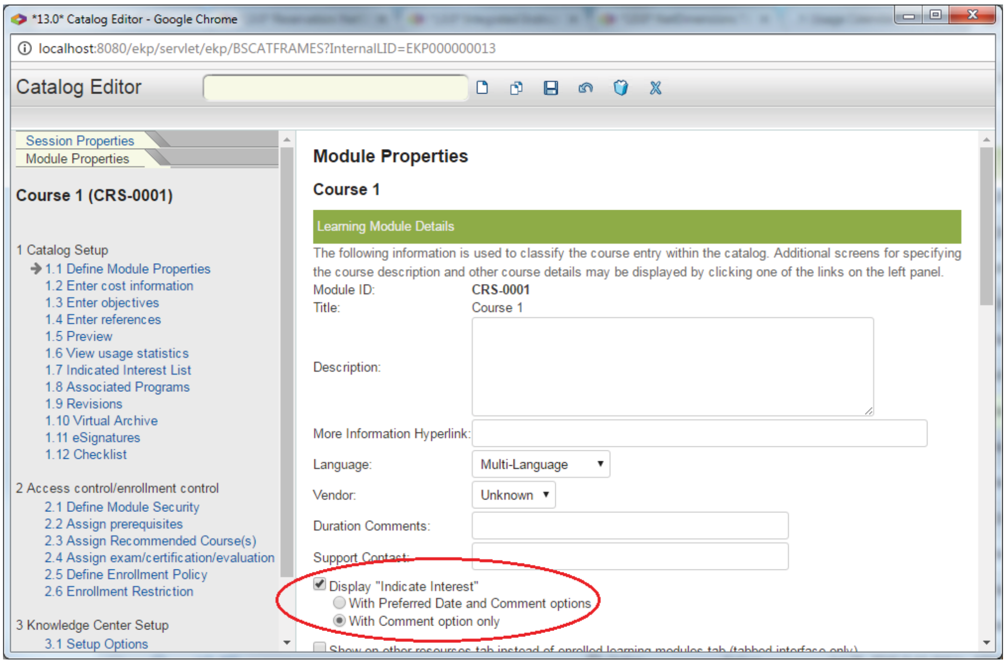
To view usage statistics click on **View Usage Statistics** in the Catalog Editor. The *View Usage Statistics* screen appears.



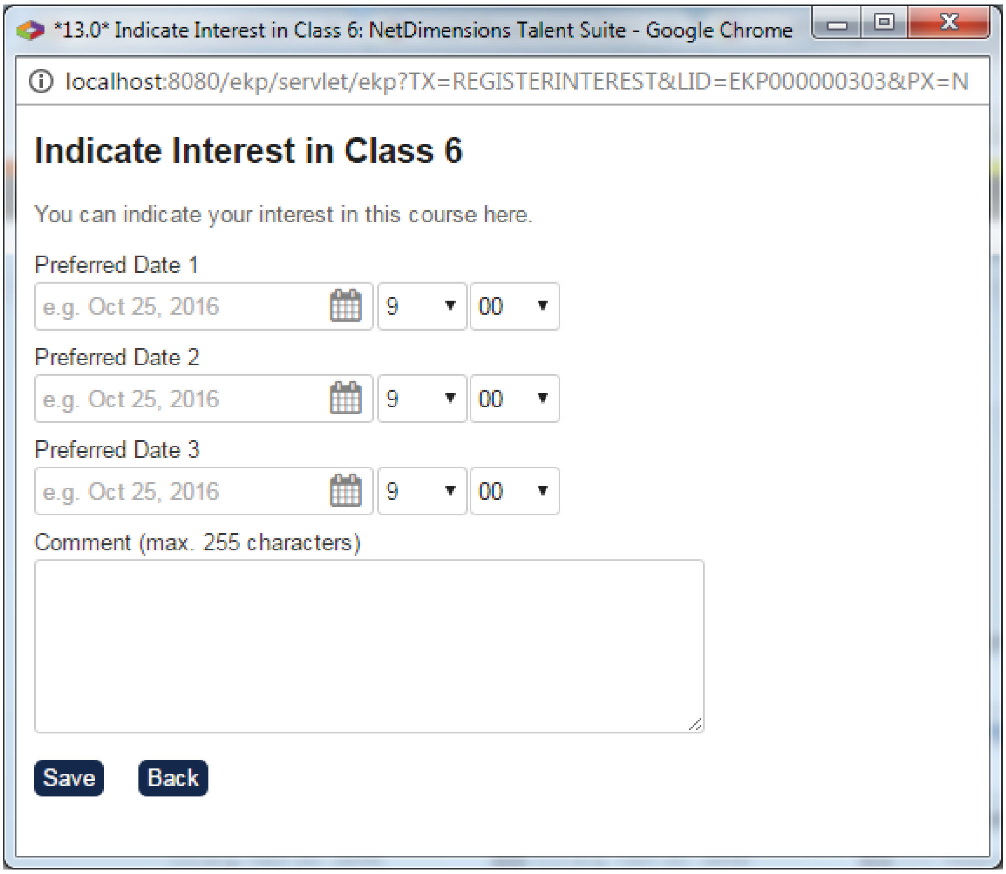
From here you may view the # of Enrollments, # of Withdrawals, # of Completions, # of Knowledge Center Hits, and the Activity %.

Indicated Interest List

To allow learners to indicate their interest for a given course via the course catalog page, enable the *Display "Indicate Interest"* checkbox:

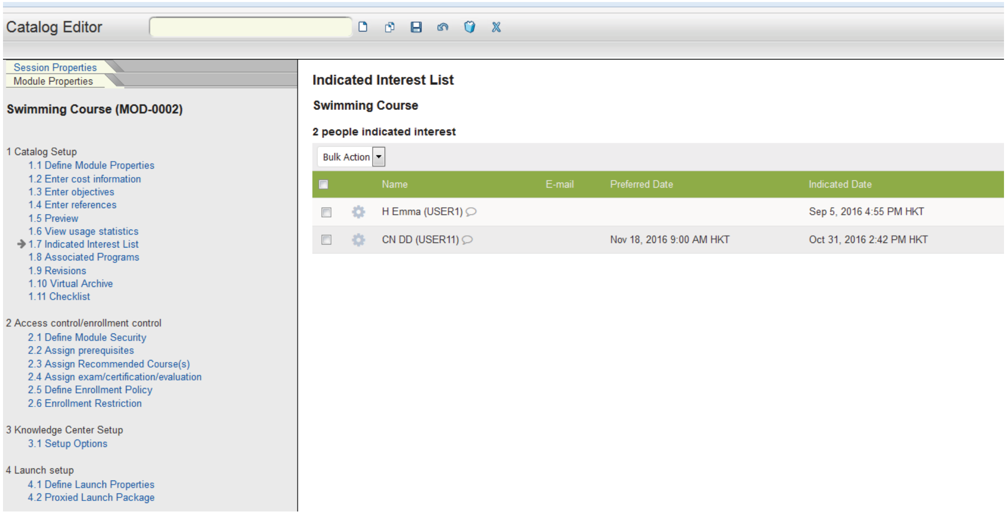


If the "*With Preferred Date and Comment options*" radio button is selected, the Indicate Interest page for a course will show the Preferred Date options:



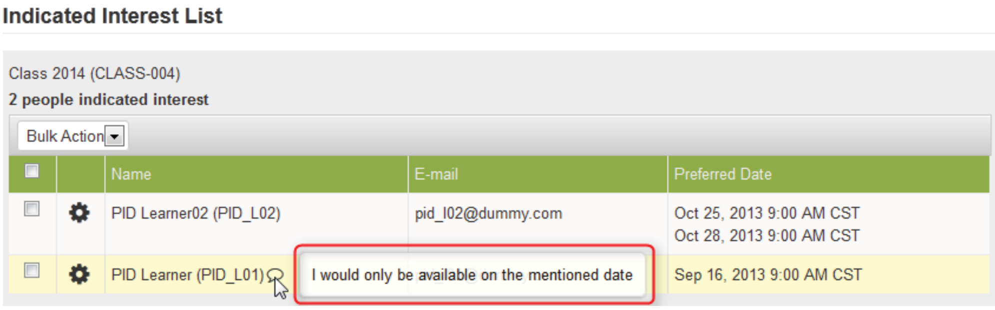
If *With Comment option only* is selected, the preferred date fields will not be presented to the learner.

To view a list of users who have indicated interest in taking a course click on **Indicated Interest List**:



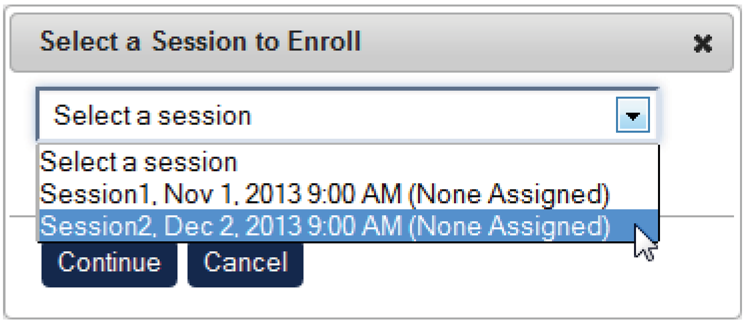
From here, administrators can

- View learner name with email, preferred dates, and when each learner indicated interest
- View the comment provided by each learner (via mouseover)



- E-mail learners (individual or in bulk)

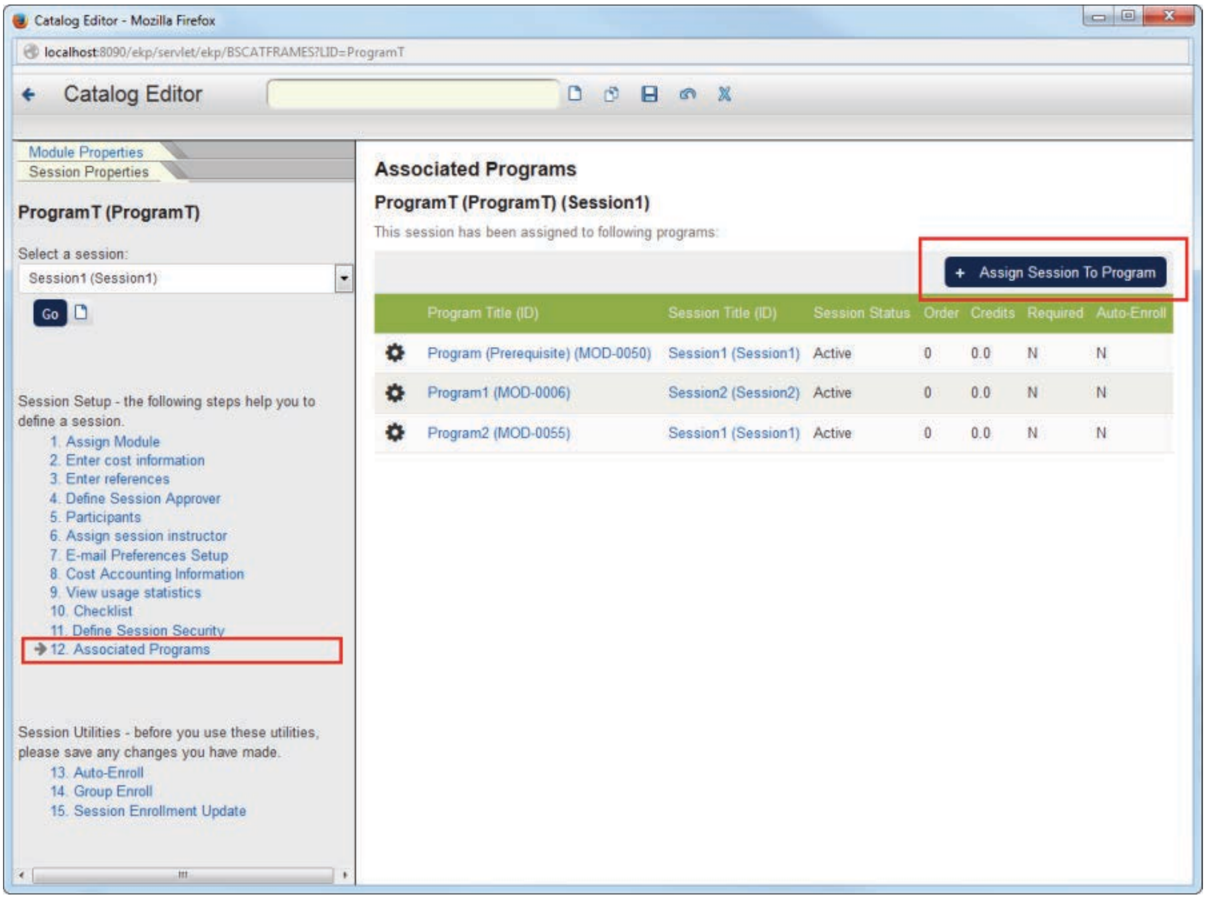
- Enroll learners onto a session (individual or in bulk)



- Remove learners from the list (individual or in bulk). Upon successful enrollment, learner will be automatically removed from the indicated interest list (regardless of assignment, if multiple assignments is enabled).

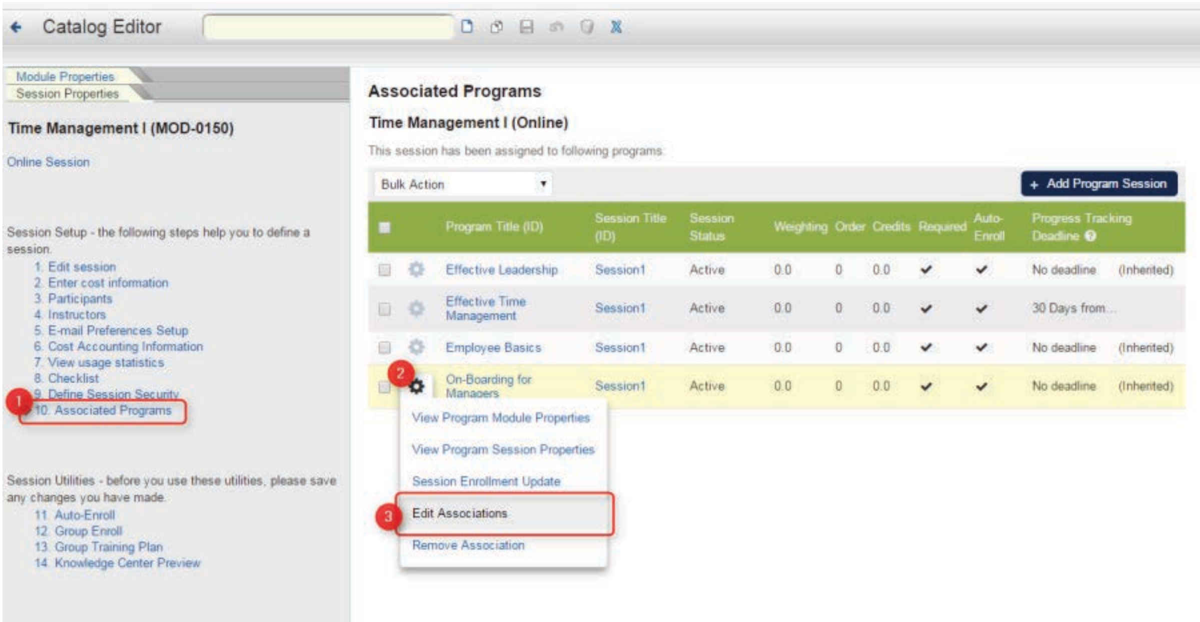
Associated Programs

Associated Programs lists the program sessions that have this module/session assigned, along with the program module settings:

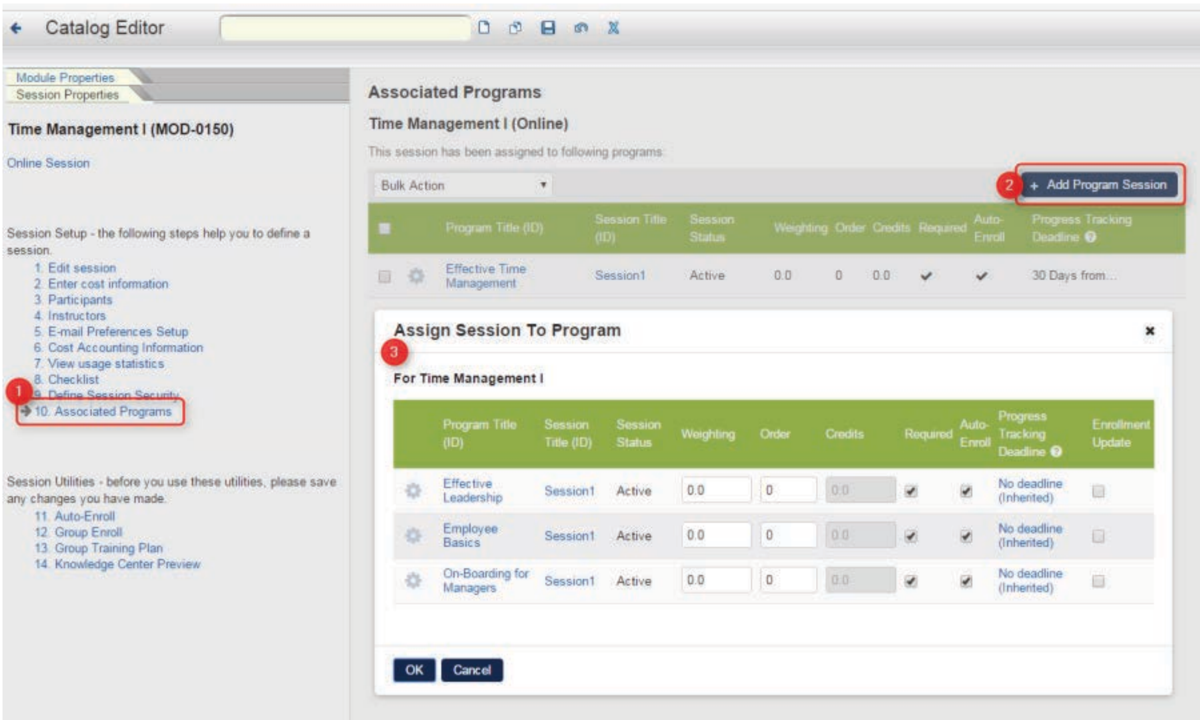


For each associated program session, you can

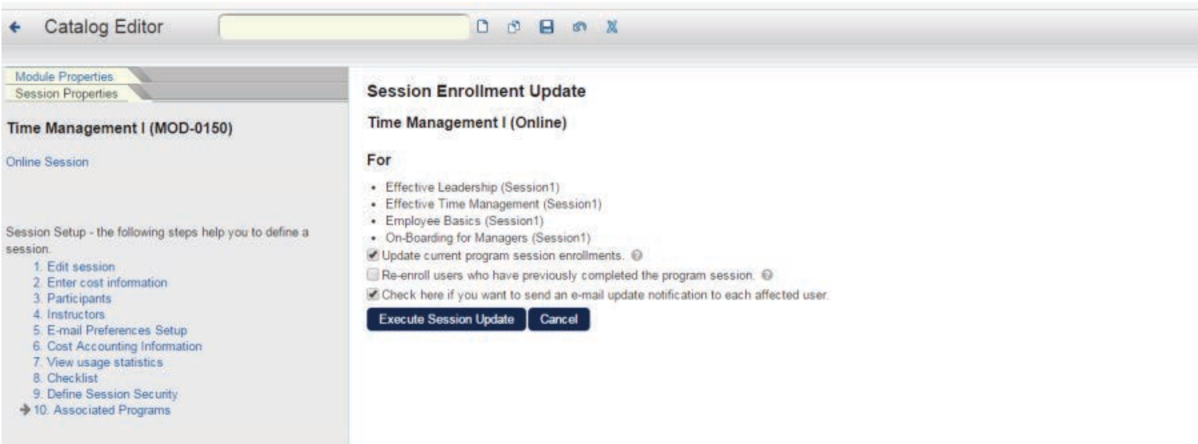
- View Program Module Properties
- View Program Session Properties
- Session Enrollment Update (also available as bulk action)
- Edit Association (also available as bulk action)
- Remove Association



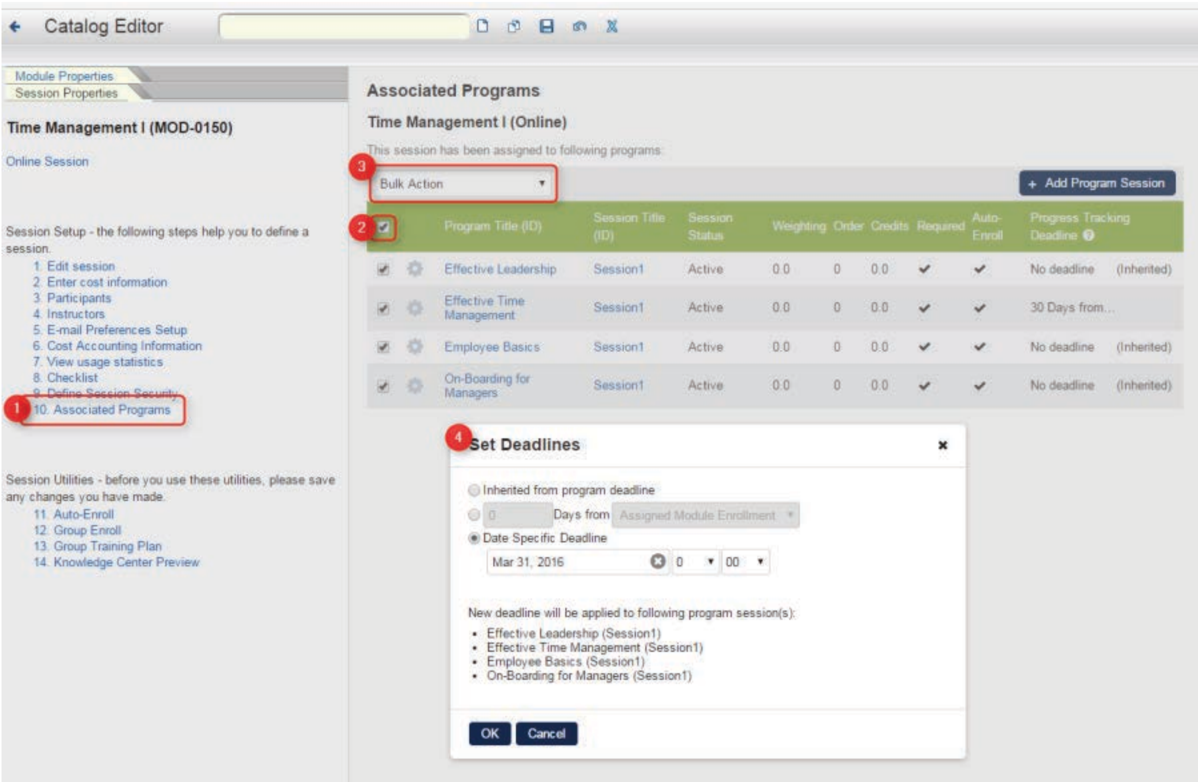
At the session level, "+ Add to Program Session" allows you to assign the session to one or more program sessions, including specifying program module settings like "Required" and "Auto-Enroll":



When performing Program Session Enrollment Update, you will be prompted for the update settings before a Session Enrollment Update is executed for the selected Program Sessions. This flow can also be initiated by enabling the "Enrollment Update" checkbox for the appropriate program sessions when adding, editing, or removing associations.



To apply the same deadline settings across multiple Associated Programs, there is a "Set Deadlines" bulk action:



A similar screen is available in Session Properties listing associated programs for the respective session.

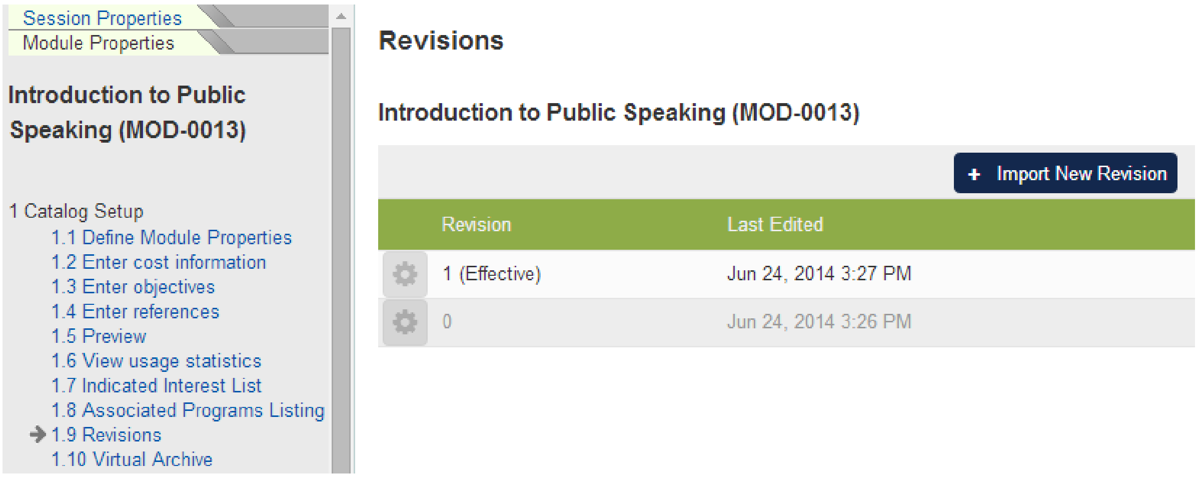
Revisions

New revisions of courses can now be directly imported from the Catalog Editor. The following learning types supports versioning:

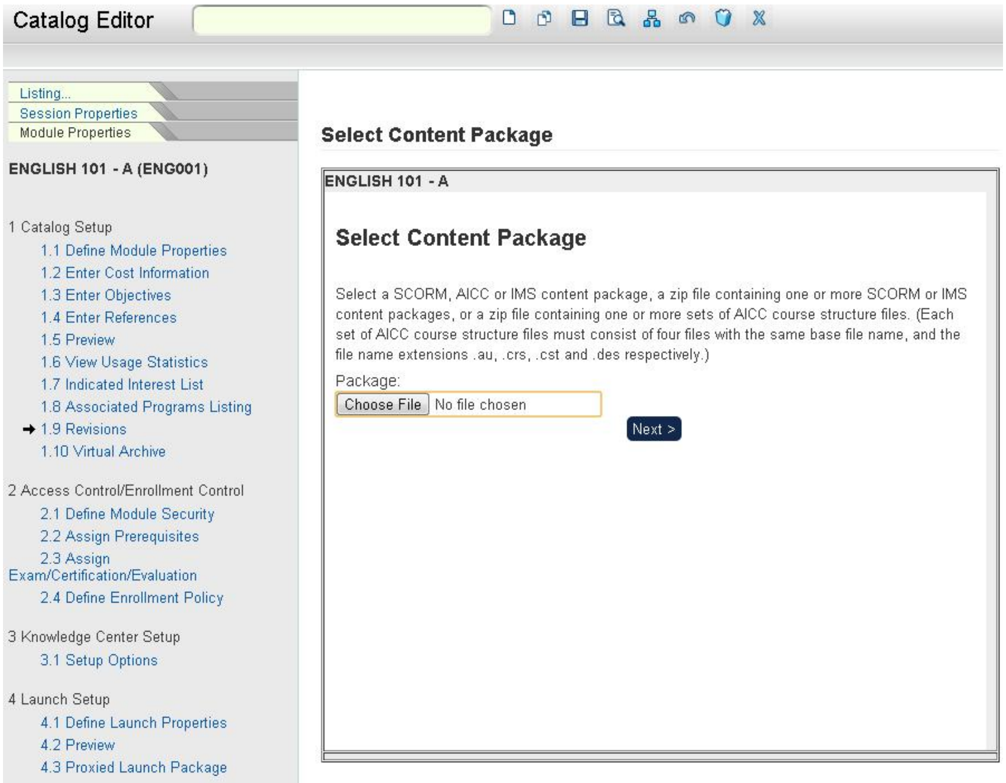
- Coaching
- Exam
- Online
- On the Job Training
- Self Training (Paper)
- Self Training (Video)
- Special Interest Group
- Task

- Virtual Classroom (Archived)

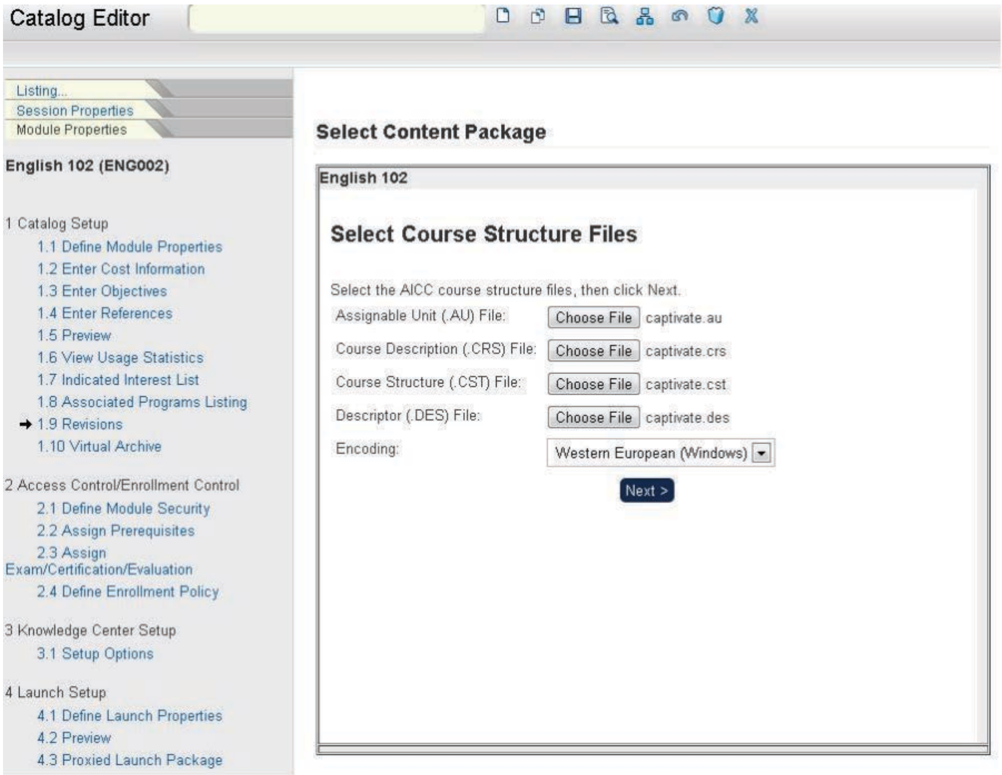
This can be achieved by navigating to the Revisions page of a course on the Catalog Editor, and then clicking Import New Revision.



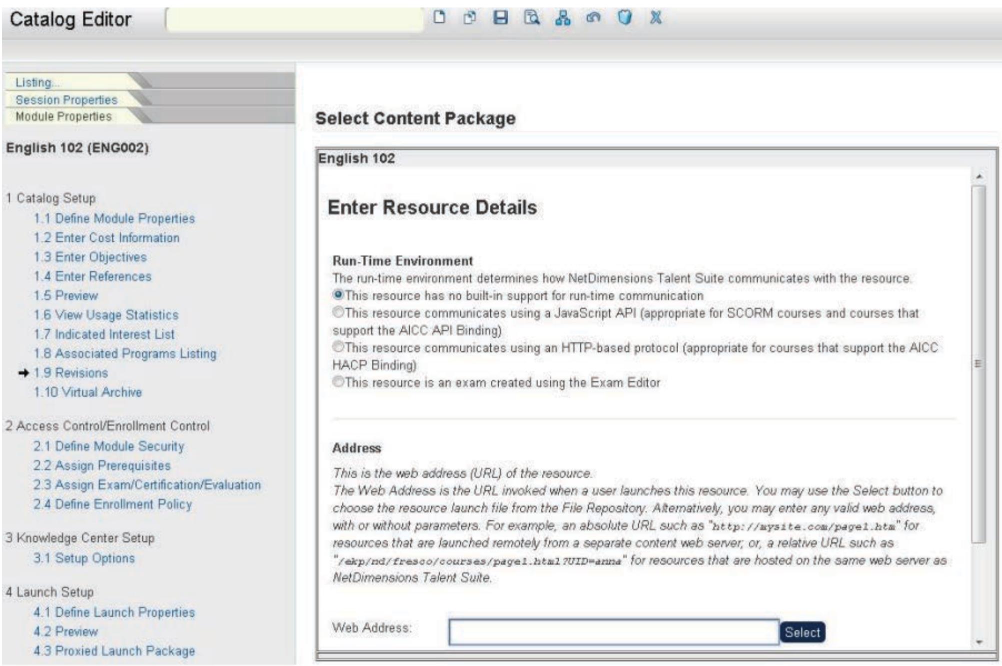
Each file format requires different parameters: For importing Content Package:



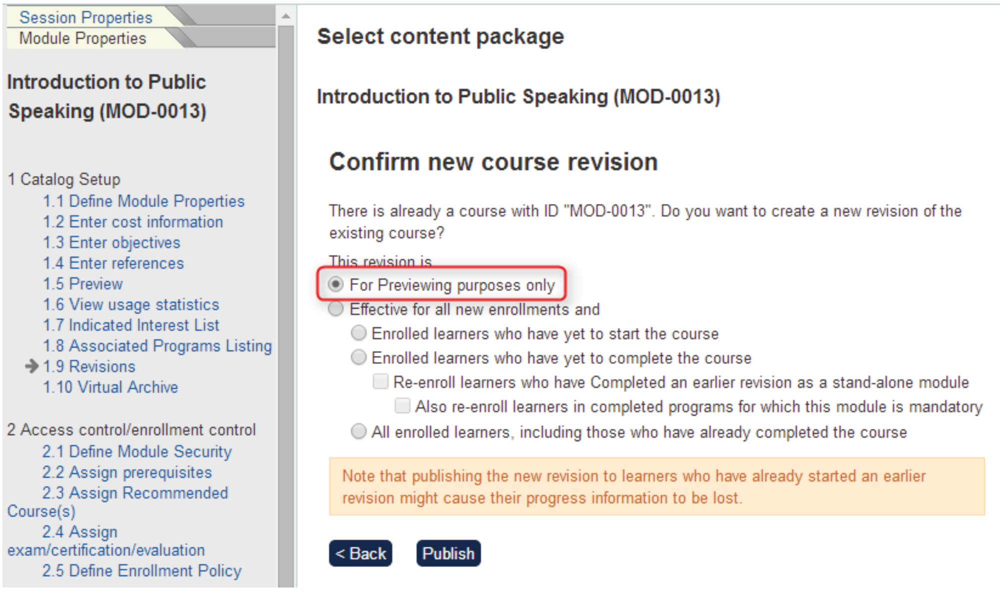
For importing AICC Course Structure



For importing Resources

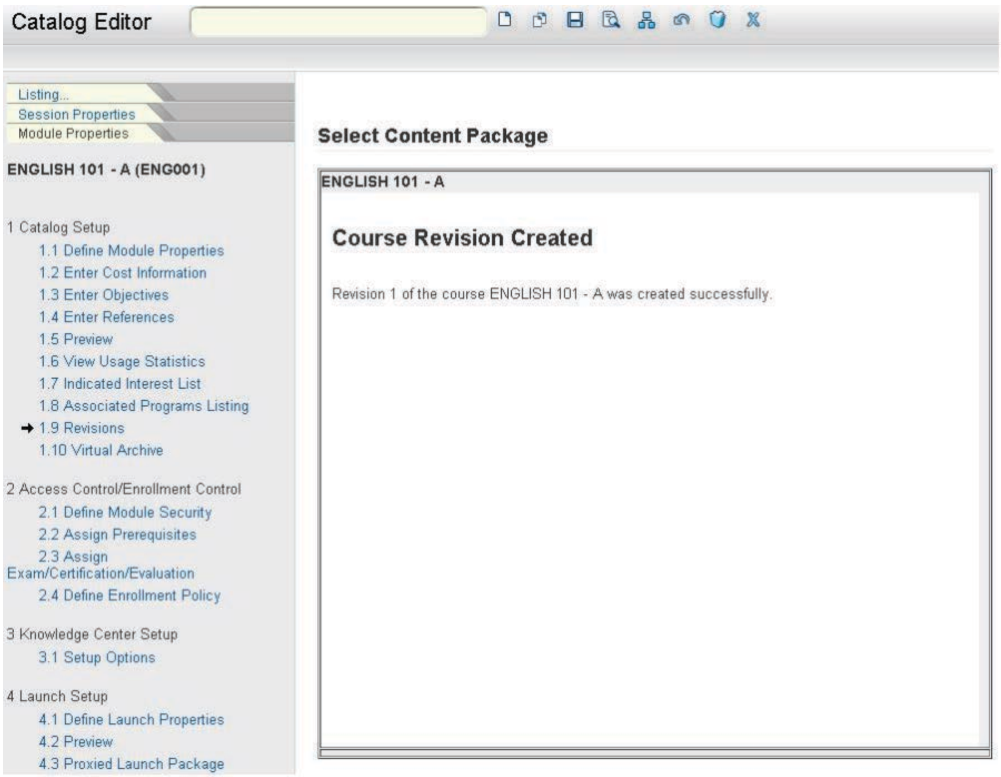


Once the required parameters are inputted, click the **Next** button. The screen refreshes and displays the *Confirm New Course* Revision screen.



When the "**Also re-enroll learners in completed programs for which this module is mandatory**" option is selected, the LMS will scan through the system to find all users who have completed a previous revision of course. If the completion is linked to a program, the system will look for the immediate active program containing the revised module to execute session enrollment update or the topmost level completed program to execute re-enrollment.

If a user has completed two different programs which both contain the revised module, two re-enrollments will be done. Therefore with this option, any user who completed the revised module before can take the latest revision and preserving the program-module relationship. Confirm the new course revision and then click **Publish**. A message is displayed confirming the revision of the course has been created successfully.

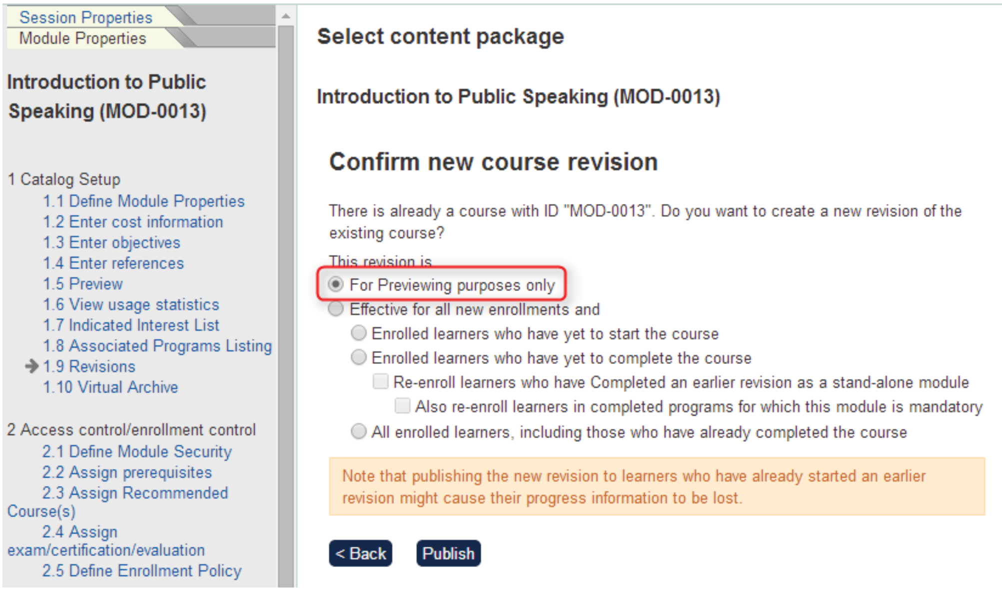


Note: All revisions made will be displayed on the *Revisions* page.

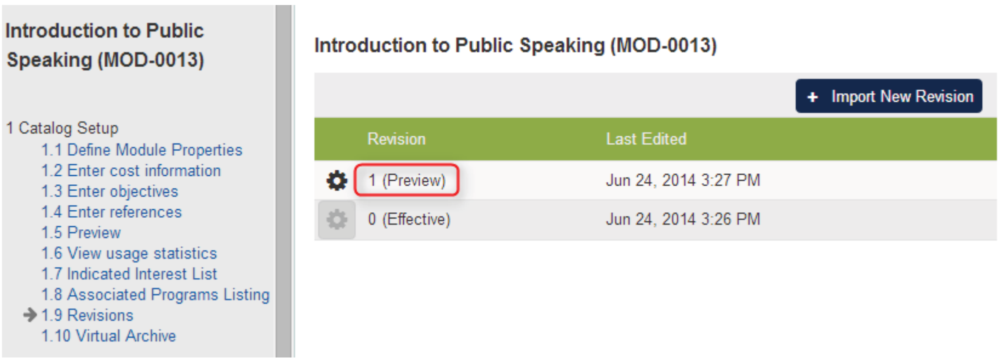
Preview Revisions

(available for Performance, Learning, and e-Learning only)

You can preview revisions to test them before rolling out to learners. To import a revision for previewing, select the first publish option:

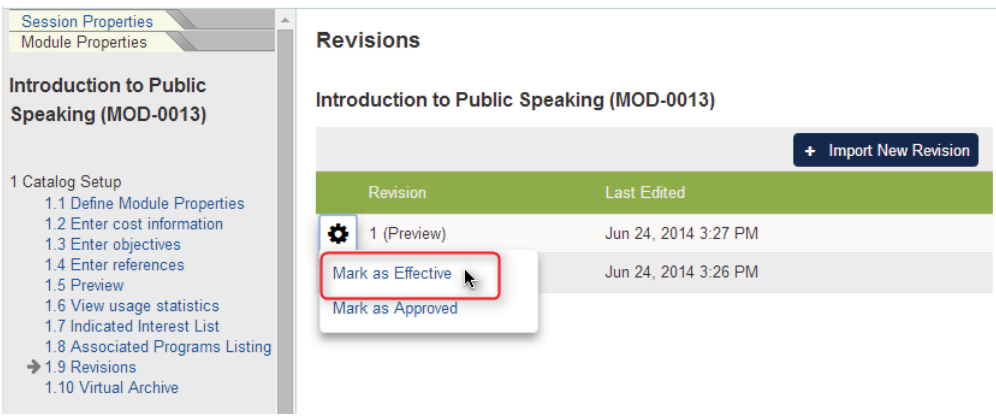


Once a "Preview" revision is created, Course Administrators are able to preview this by clicking on the " *Preview*" link in the Catalog Editor. A preview revision cannot be enrolled into by learners, it is only available for preview by Course Administrators.

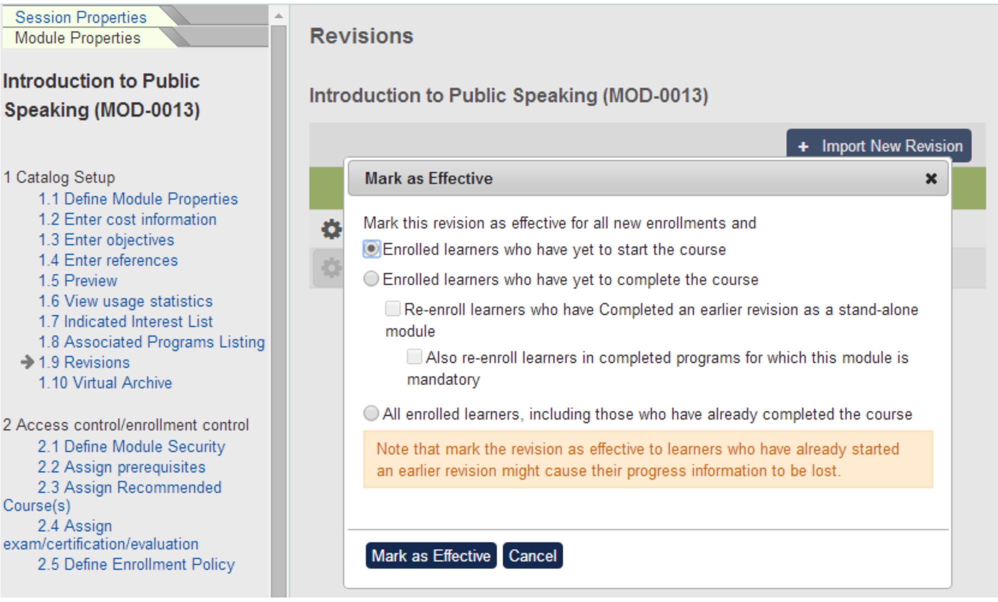


If "For Preview Purposes only" is selected, a new "Preview" revision is created. Note that revision zero is still the effective revision.

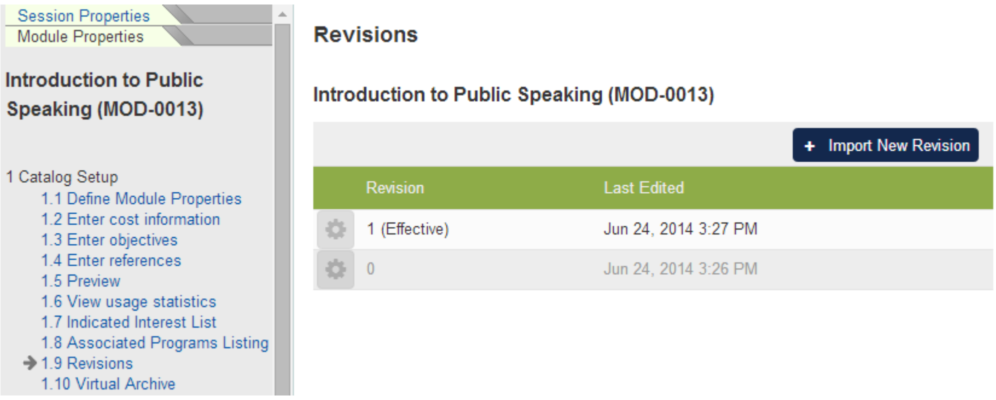
When a "Preview" revision is ready, it can be "Marked as Effective" to allow for enrollments by learners:



When Course Administrators are done with previewing, the revision can be "Mark as Effective" or "Mark *as Approved"*



Existing import options are available when marking a revision as effective.



The new revision (revision 1) will now become the effective revision (overriding revision zero)

Notes about Preview/Effective Revision:

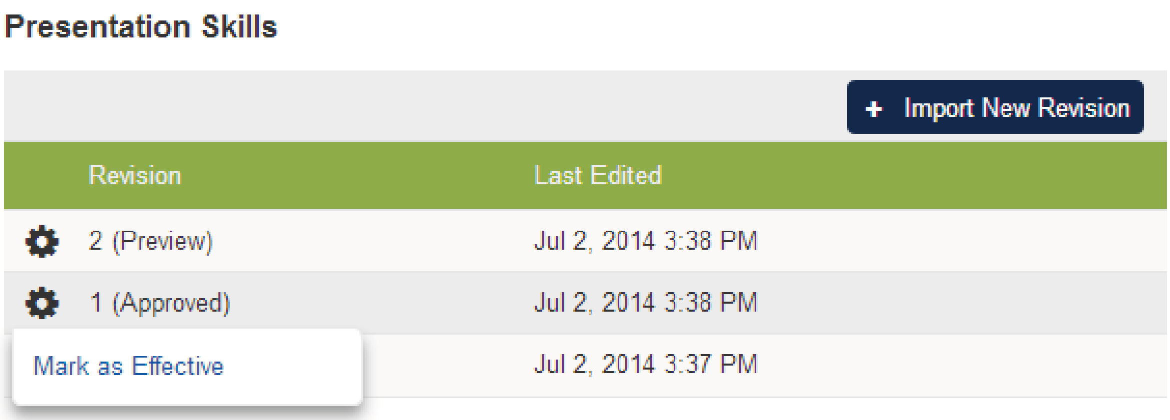
- When a new course is imported, Revision 0 (zero) is always the effective revision
- There is no limit to the number of preview revisions you are allowed to create. However, only 1 Effective revision is allowed at a time, meaning that making a new revision as effective will void the effectiveness of a previous effective revision and removing any Preview references for any older revisions than the newest Effective revision. The revision state is indicated in brackets, nullifying previous revision states will remove the revision state in brackets and be in gray. Therefore, a Preview revision state can only appear after the Effective revision.
- Please note that the highest revision number no longer has to be the effective revision.
- Existing functionality that refers to "Latest" course revision will now refer to "Effective" revision only. This includes Enrollments by Learners, Share/Credit Enrollment Option for Programs, Compliance Analysis, and Competency Calculations. Since a newer effective revision will void the effectiveness of the older one thus this would still trigger the necessary revocation logic if the condition has no longer been met.
- mEKP "Allow download" will only download effective and earlier revisions

Approved Revisions

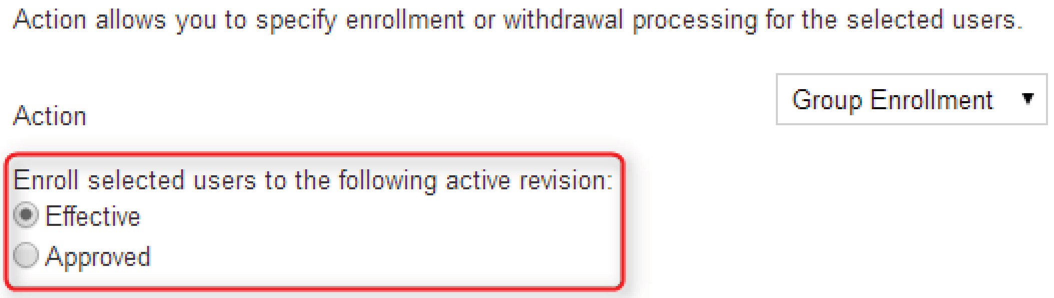
This intermediate revision state allows organizations to push users to get a head start with enrolling into the most up-to-date content even though this update has not been deemed as effective yet in fulfilling various other requirements. This mainly caters for highly productive environments where employees have to get a head start on the latest training materials before the training is made official. For courses that don't require this much complexity in rolling out training materials, simply stick to importing the content as Effective revision which behaves like before. If the content changes markedly then the material should be regarded as a separate course thus a new course should be created instead of replacing it with a newer revision.

Only Course Administrators can enroll learners into approved revision from **Catalog Editor > Group Enroll**. Although this revision type is not publicly available to learners, transcript details about this revision would still be available in Current Learning Modules, Records/Transcripts or other areas. Users can't be self-enrolled or be assigned with a course on approved revision, an administrator has to manually Group Enroll users to take the approved revision or there's some automated carry-forward enrollment logic to do so.

Approved revision can only be after Effective revision, while Preview revision can only be after Approved revision.



Approved revision can only be "Mark as Effective".

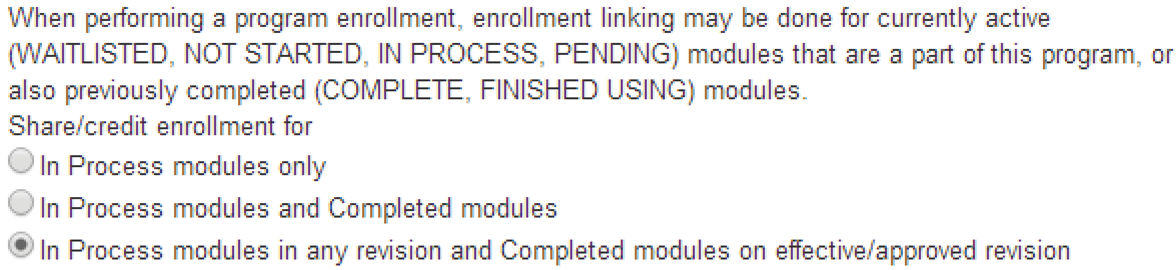


In Group Enroll, Course Administrators can choose approved / effective revision for the learners;

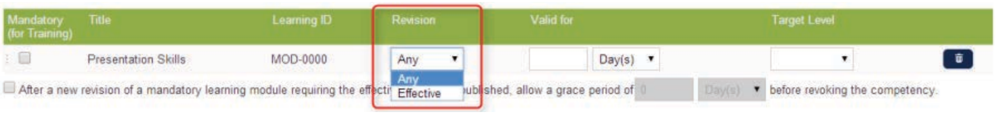
learning types not supporting revision will not have this selection, and if there is no approved revision, "Approved" option will be disabled.

With this new revision type, the latest revision is not necessarily the effective revision, some changes are made in these areas:

- Enrollment linking option "Share/credit enrollment for "in process" modules in any revision and "completed" modules on latest revision" prior to version 10.1 is changed to "In Process modules in any revision and Completed modules on effective/approved revision" in Program's enrollment policy, which means that if there are completed transcripts on both effective and approved revisions, latest of these will be sharing credits with the program module transcript.
- Learning requirement in Competency Editor will have the revision requirement changed from "Any / Latest" prior to version 10.1 to "Any / Effective", where "Any" means any transcript on approved / effective revision while "Effective" means only transcript on effective revision.



Enrollment linking options are updated according to the introduction of new revision types



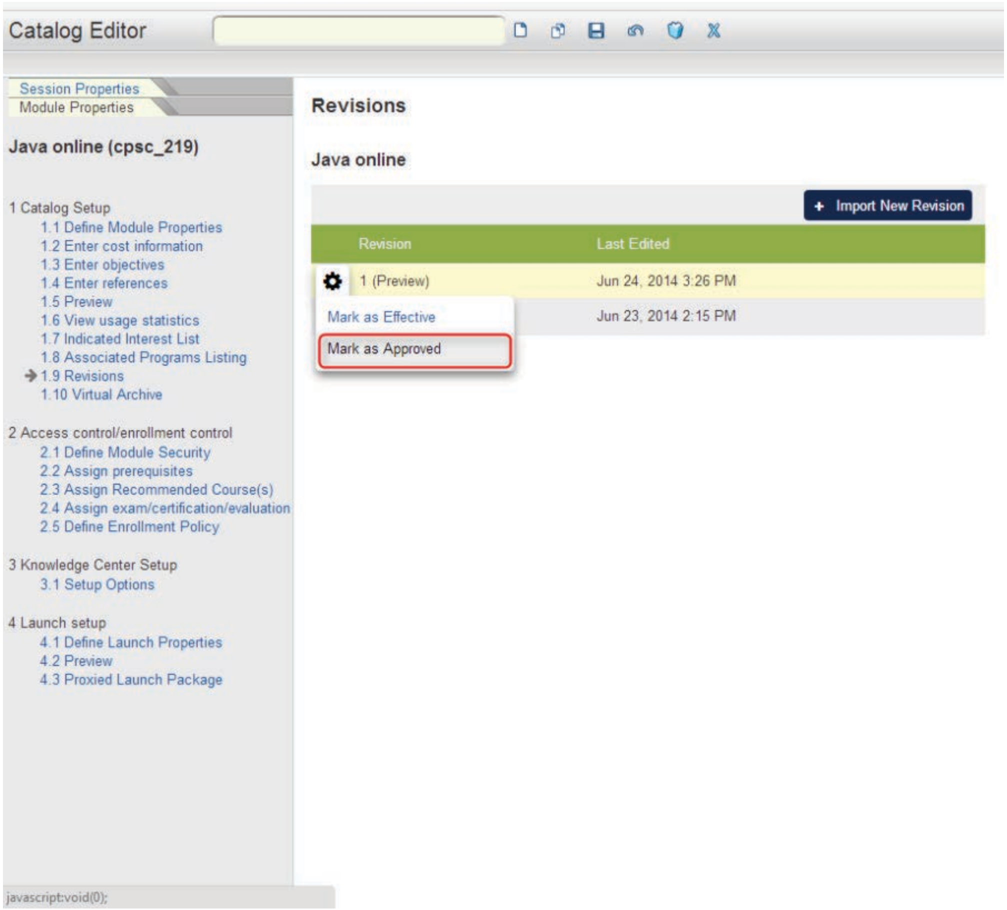
In Competency Editor, learning requirement would now consider Any or Effective revision.

Notes about adding the Intermediate Approved Revision to the mix:

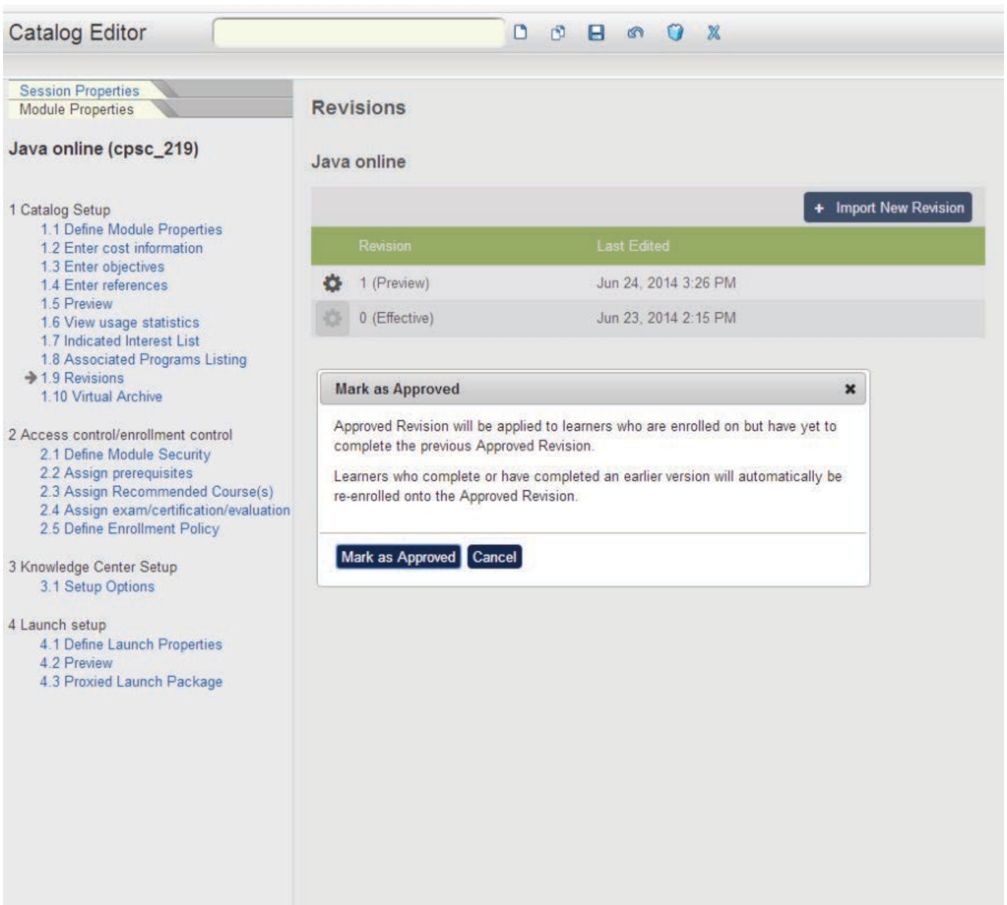
- Just like Effective revision, only 1 Approved revision is allowed at a given time.
- Implicitly, you can rank Effective revision as the highest state followed by Approved revision then Preview revision. Marking/Importing an Effective revision can nullify the states of any previous Effective revision, Approved revision and/or Preview revision(s) so Approved or Preview revision can appear only after an Effective revision but not before. The same can be applied for Approved revision. Marking/Importing an Approved revision can nullify the states of any previous Approved revision and/or Preview revision(s) so Preview revision can appear only after an Approved revision but not before.

When a revision is marked as approved, a popup window will notify the Administrator that automatic re-enrollments will occur under the following conditions:

- A revision is marked as Approved and learners have yet completed an earlier Approved revision (this acts as an auto carry-forward before the newest Approved revision nullifies any previous Approved revision).
- A learner completed a revision and there is an Approved revision to be taken (the auto get ahead logic for those who have completed in the past)
- A learner who will complete any revision and there is an Approved revision to be taken (the auto get ahead logic for those who will complete an earlier revision)



Click on 'Mark as Approved'



A popup window will appear notifying user the actions that are involved.

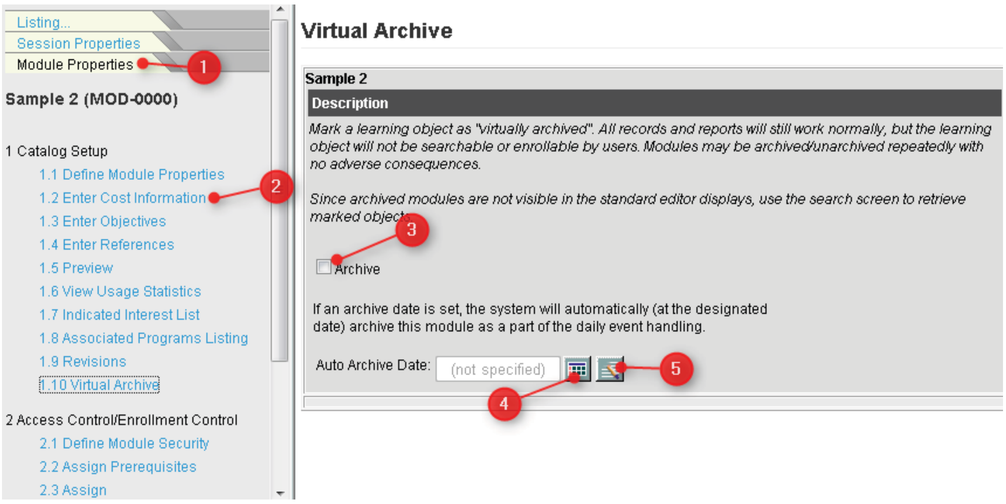
Please note that when an approved revision is marked as effective, learners who have completed the approved and now effective revision will not be re-enrolled again.

Virtual Archive

When a Learning Module is archived in the LMS, it means that the module is no longer visible and learners can no longer enroll on the learning module.

Although archived modules are no longer considered as active, still, it works normally and it can be searched using the Catalog Search Page wherein there's an option that filters all archived modules.

To archive a learning module, proceed to learning module properties:

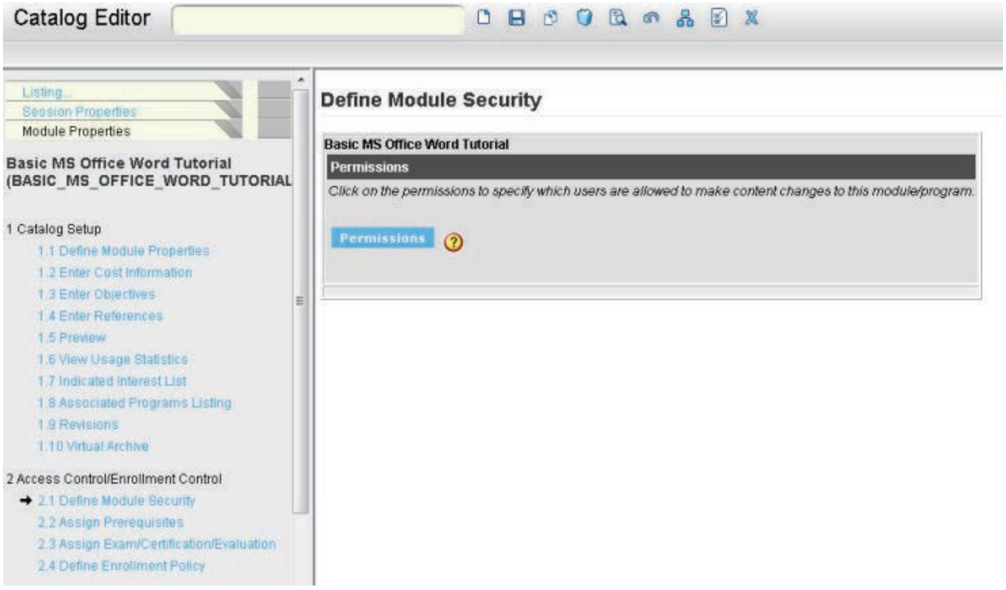


1. Click the Module Properties tab.
2. Select the Enter Cost Information link.
3. To archive the selected module, tick the Archive box.
4. A module can be archived automatically by setting the archived date. Click the Calendar button to select the date on when to execute the archive process.
5. Use this button to remove the date specified in the Auto Archive Date.

Click the **Save** icon in the Catalog Editor Tool Bar to save the changes.

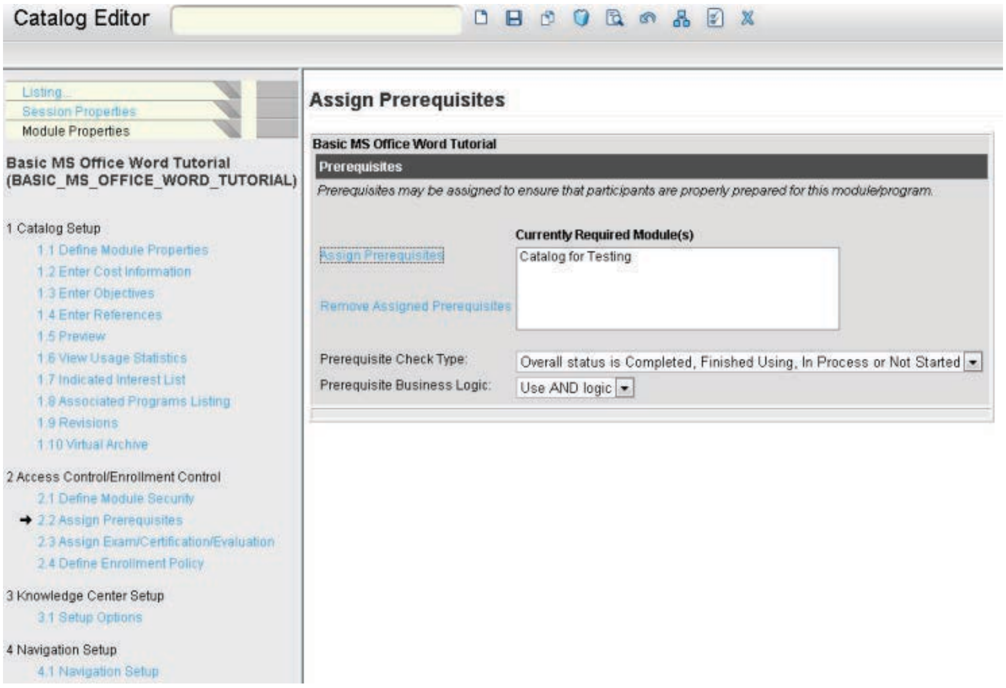
Module Security

To specify the individuals assigned to control who is allowed to make content changes related to a learning module, i.e. the Owners: Click on **Define Module Security** in the Catalog Editor. The *Defin e Module Security* screen appears.



To define owners by role, click on **Permissions** under the Permission category to launch the permissions selector.

Assigning Prerequisites



1. To assign prerequisites, click on **Assign Prerequisites** in the Catalog Editor.

2. Click on the **Assign Prerequisites** hyperlink. The *Selector* screen appears.

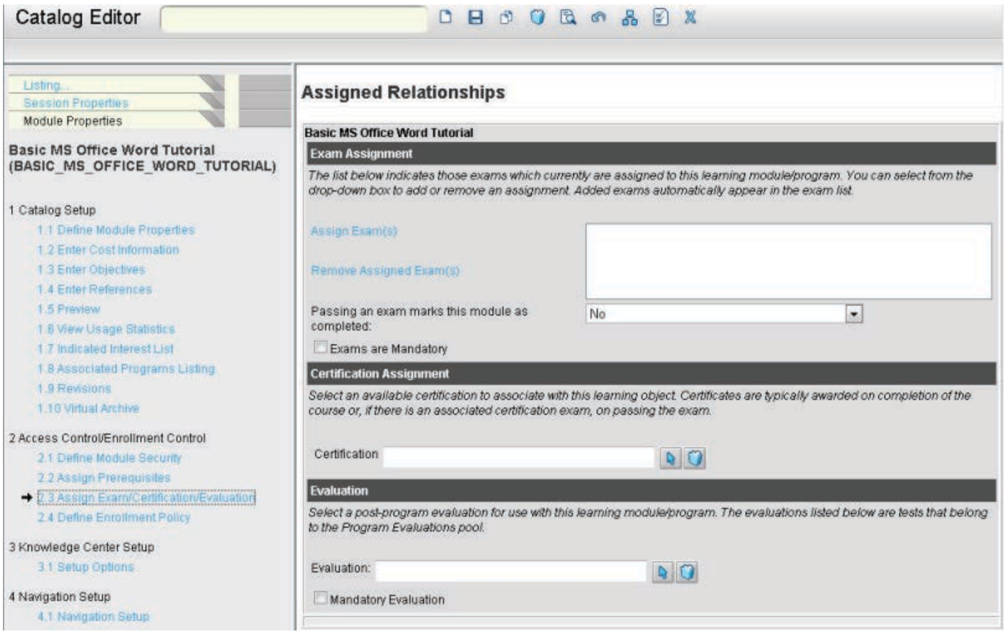
3. Select from the **Available Choices** field.

4. Click the **Down** arrow. Your selection will appear in the **Selections** field.
5 Click **OK**. Your selection appears in the *Assign Prerequisites* screen.

6. Define the **Prerequisite Check Type** by choosing from the drop-down menu.
7. Define the **Prerequisite Business Logic** by choosing from the drop-down menu.
8. Click the **Save** icon

Assign Exams, Certifications, Evaluations

Click **Assign Exam/Certification/ Evaluation** in the Catalog Editor:



1. Specify the associated exam, click on the **Assign Exam(s)** hyperlink.
2. To remove an exam, click on the exam and then click the **Remove Assigned Exam(s)** hyperlink .
3. To specify mandatory testing, tick the **Exams are Mandatory** box.
4. Select the associated certification by clicking the **Select** icon by the Certification field.
5. Select the associated evaluation by clicking the **Select** icon by the Evaluation field.
6. To specify mandatory evaluations, tick the box in the **Mandatory Evaluation** field.
7. Click the **Save** icon.

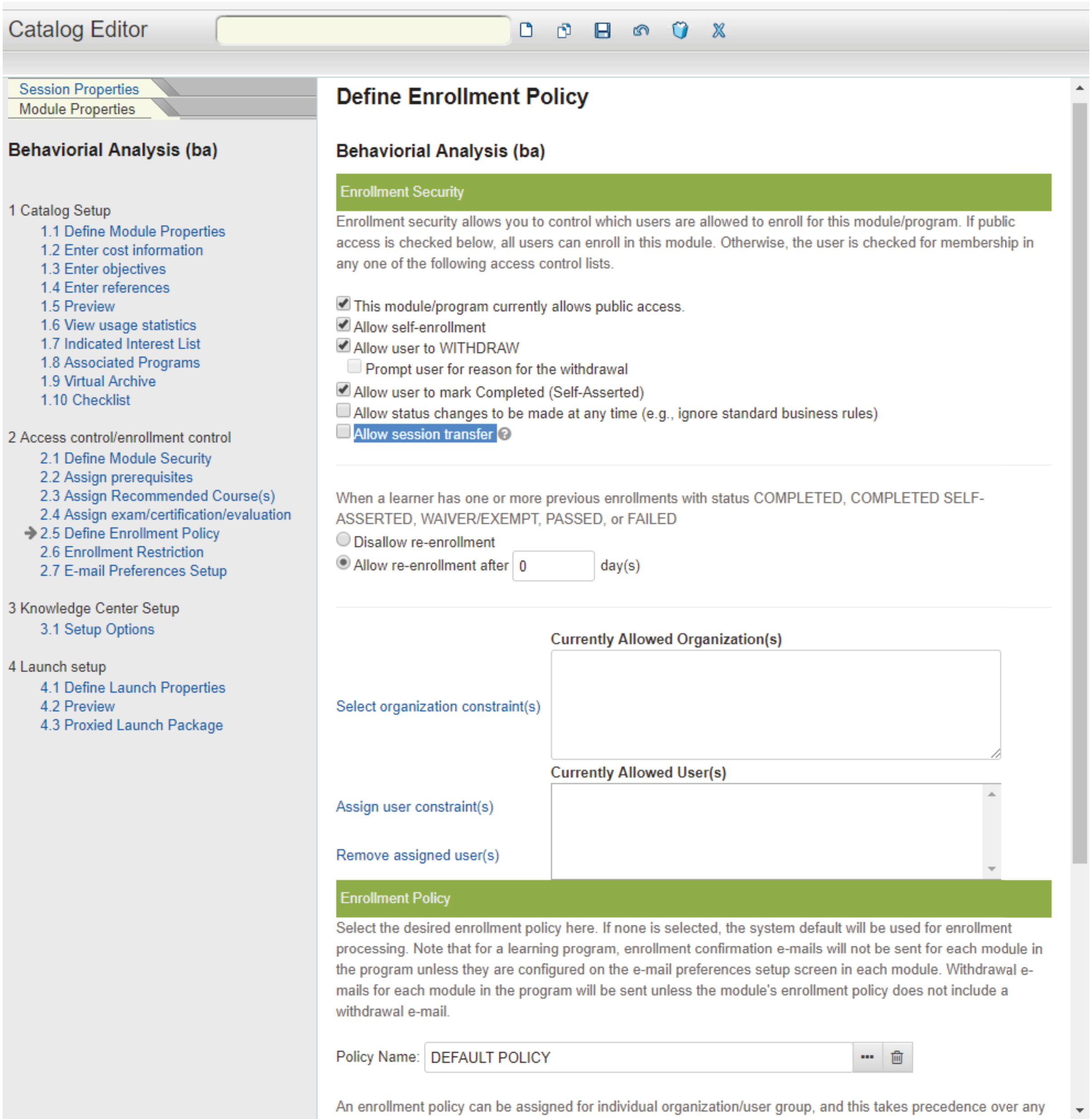
Enrollment Policy

To define the enrollment policies to be associated with a particular course, click **Define Enrollment Policy** in the Catalog Editor. The *Define Enrollment Policy* screen appears with the following settings:

Property	Description
This module/program currently allows public access.	Whether public users are allowed to access this learning object.
Allow self-enrollment	Whether users will be allowed to enrol in the Module themselves.
Allow user to WITHDRAW	Whether users will be allowed to withdraw to their enrollments.
Prompt user for reason for the withdrawal	Whether users will be asked for the reason for the withdrawal, if **Allow user to WITHDRAW** above is checked.
Allow user to mark Completed (Self-Asserted)	Whether users will be allowed to mark their enrollments as completed.
Allow status changes to be made at any time (e.g., ignore standard business rules)	Whether users will be allowed to make changes to their enrollments.

Allow session transfer	When enabled, allows Learner transfer onto an alternative session by Reviewer or the Participants themselves. A "Session Transfer" button will appear against the transcript if:
	• The transcript status is "Not Started", "In Process", or "Session Selection Needed"
	• There are alternative sessions satisfying **ALL** of the following:
	  ◦ Status of "Active", "Invitation only", or "Prompt user to select session"
	  ◦ Start Date that is in the future or not specified
	  ◦ Current date within the Enrollment Period
	  ◦ The number of participants < the maximum
	A reviewer with the "**Session Transfer**" and "**Review Records/Transcript**" Access Controls can also carry out Session Transfers regardless of this setting.

Disallow re-enrolment	Whether to disallow re-enrolment.
Allow re-enrollment after day(s)	Whether to allow re-enrolment. This field is used to specify the history expiration window, i.e. the number of days after which the student may re-enroll. For example, if the value is set to "30" then a student taken this course more than 30 days ago will need to re-take this course.
Select organization constraints	Click to select the organizations that are allowed access to this module.
Assign user constraint(s)	Click to select the participants that are allowed access to this module.
Remove assigned user(s)	Click to remove the selected user.
Policy Name	Click the **Select** icon to specify an associated enrollment policy. Click the **Delete** icon to remove a policy.
Organization / User Group	Specify whether another enrollment policy can be assigned to individual **Organization** / **User Group** to take precedence over any configured policy for the course. Then select the **Organization** / **User Group** and the **Policy Name**. Click **Add organization** / **User Group Policy** to add a new input row if required.
Allow a configured organization enrollment policy to take precedence over this course policy	Whether to let a configured organization enrollment policy take precedence over the policy of the course.
Apply Enrollment Policy when transferring from a "Prompt User to Select Session" session	Whether to apply the Enrollment Policy if the learners are transferred from a "Prompt User to Select Session" session.
Allow reopen	Whether to allow users to reopen this module once it has been completed.



Organization-level Enrollment Policies

(available for Performance and Learning only)

Organization-level Enrollment Policies enables approval workflow to be determined by a user's organization rather than requiring all organizations to use the same course-specific enrollment policy. Traditionally, enrollment policies have been assigned to a course, and all users who self-enroll in that course have the same enrollment policy. With this feature, an enrollment policy can be assigned at the organization unit level and optionally marked in the course as taking precedence over the course policy.

Setup Step One

The first configuration action required is to define a policy to all organization units that need an org-based approach to approval workflow. Users typically have a hierarchy of org units, and the system will traverse the hierarchy from the BOTTOM to the top, using the first org encountered as the users candidate org policy. For example, if a user is in org "Sales and Marketing/Sales/London" and "Sales and Marketing" has policy "A" configured and Sales has policy "B" configured, the system will consider policy "B" to be the applicable org policy for users in this org unit.

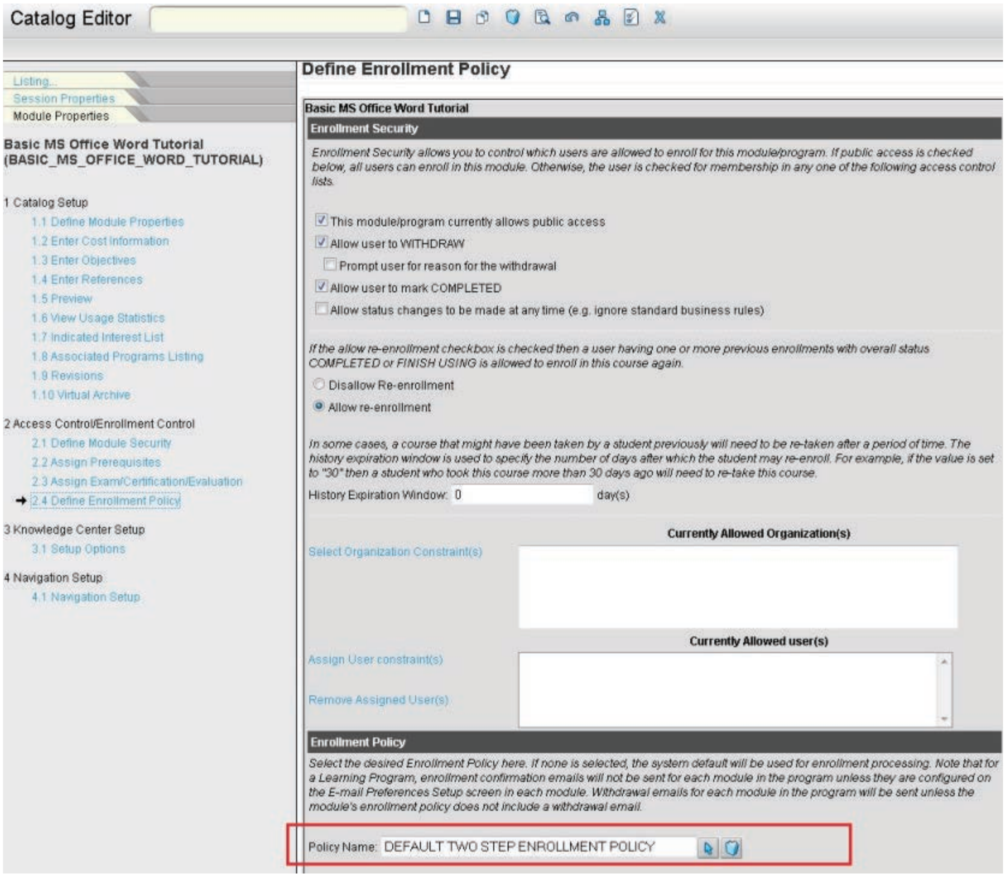
Now, the fact that a user has an applicable org-level policy does NOT mean that it will be used. This is where Setup Step Two comes into play.

Setup Step Two

When a user attempts to enroll in a course, the system will determine if approvals are required based on the policy configured for the course (in Catalog Editor). There is now an additional checkbox on the Catalog Editor enrollment policy screen that allows an administrator to specify whether a user's org policy should take precedence over the course policy. So, at enrollment time this information is checked to determine which policy to use.

There are several important guidelines regarding the business logic of org enrollment policy processing:

1. The course must have a specific approval policy configured. The "DEFAULT POLICY" will not invoke approval processing as most courses are by default configured with this policy so as NOT to require approval processing.
2. If the user does not have an Organization policy configured or if the Organization policy is "DEFAULT POLICY" (i.e. the policy with the internal ID of **DEFAULT**), the course policy will be used during enrollment processing.



Examples

The following example of a user org hierarchy should help in understanding the business logic that is applied when traversing the org structure from the bottom-up for each user. Assume the org configuration is:

```
Level 1 - NetDimensions, Policy A
Level 2 - Sales, Policy B
Level 3 - Marketing, Policy DEFAULT POLICY
Level 4 - Hong Kong, No policy configured
```

When determining the effective org policy for a specific user, the system treats DEFAULT POLICY the same as "no policy" and will ignore it and continue its scan. Thus, a user at each level would be assigned org policies as follows:

```
User at Level 1: Policy A
User at Level 2: Policy B
User at Level 3: Policy B (DEFAULT POLICY is ignored)
User at Level 4: Policy B (DEFAULT POLICY is ignored)
```

For the following enrollment examples, assume that the effective user Org Policy, Course Enrollment Policy, and Org Precedence Indicator are set as specified in each example. Also, assume that the DEFAULT POLICY is still configured as shipped, with no approval steps.

Enrollment Case 1
User: Policy: B
Course: Policy X
Org Precedence Indicator: True
Result: Policy B is used
Reason: B takes precedence over X

Enrollment Case 2
User: Policy: B
Course: Policy: DEFAULT POLICY
Org Precedence Indicator: True
Result: No approval processing is done, and the user is enrolled directly in the course. Reason: The course does not require approval processing when configured with DEFAULT POLICY.

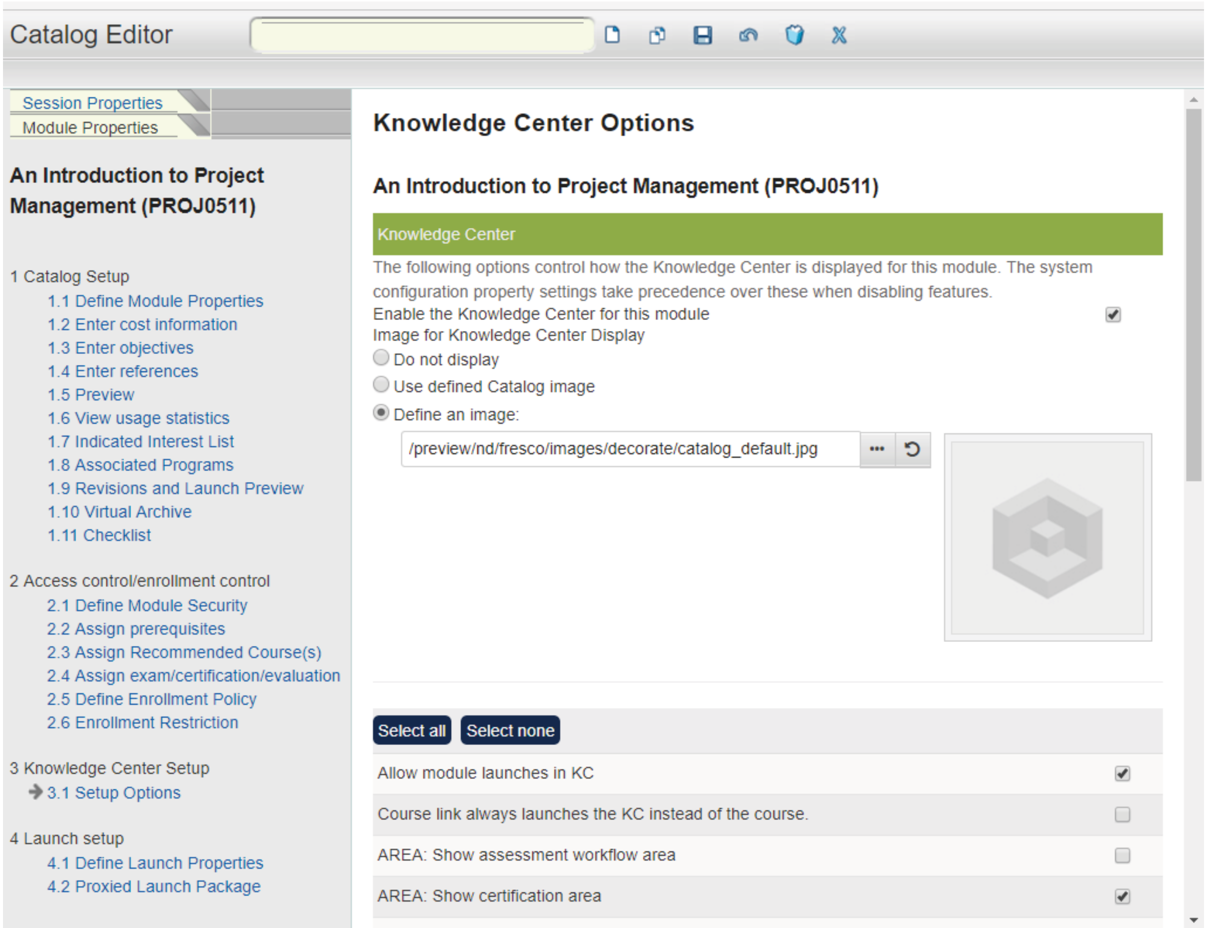
Enrollment Case 3
User: Policy: B
Course: Policy: A
Org Precedence Indicator: False
Result: Policy A is used
Reason: Org policies have no effect for a course in which the precedence flag is unchecked.

Enrollment Case4
User: Policy: (none configured)
Course: Policy: A
Org Precedence Indicator: True
Result: Policy A is used
Reason: Because there is no org policy configured, the course policy is used. This is the case for all existing policy handling (before using Org Policies), and represents the most common approval logic case.

Enrollment Case 5
User: Policy: DEFAULT POLICY (some explicitly configured the DEFAULT POLICY for the org unit instead of leaving it blank).
Course: Policy: A
Org Precedence Indicator:True
Result: Policy A is used
Reason: The DEFAULT POLICY is treated the same as "no policy".

Knowledge Center Setup Options

To define Knowledge Center, click **3.1 Setup Options** under **3 Knowledge Center Setup** in **Catalog Editor** and check "Enable the Knowledge Center for this module" to enable the Knowledge Center:

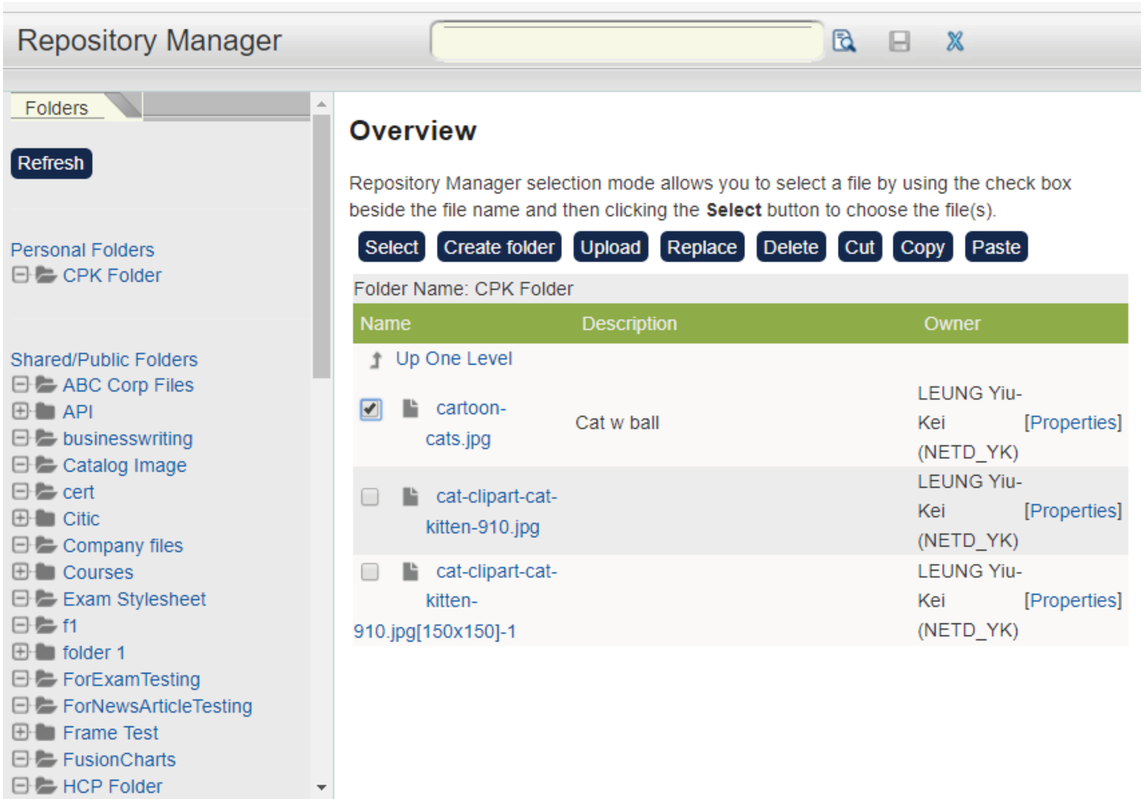


Under **Image for Knowledge Center Display**, there are three radio buttons (only one option can be selected) to determine whether to display a picture in the Knowledge Center:

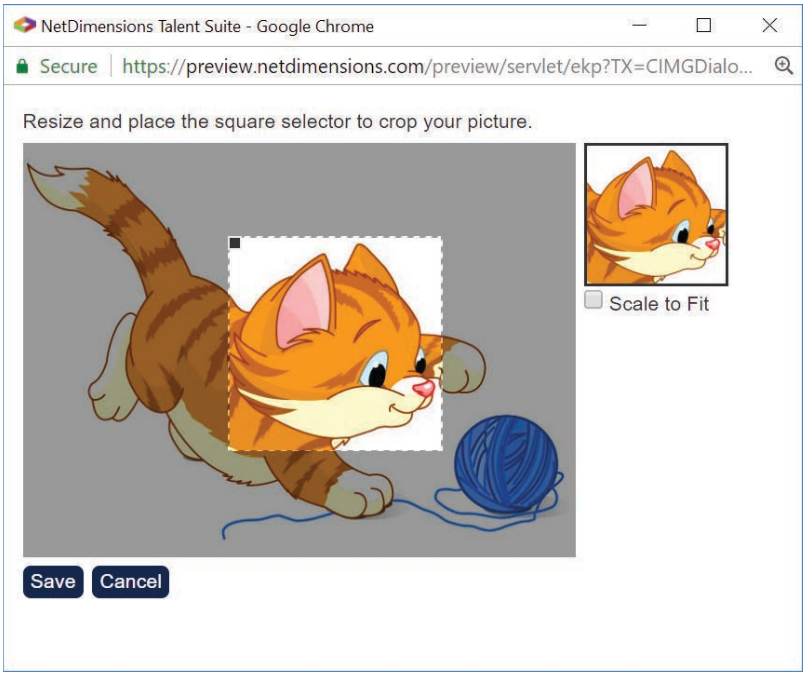
- Do not display - No image will be displayed for the KC. Once selected, the image preview on the right will be hidden.
- Use defined Catalog image - Use the Module's Image for Catalog Display defined in **1.1 Define Module Properties** under **1 Catalog Setup**. The Image will be displayed on the right as a preview.
- Define an image - Select an image file to be displayed for the KC from the **Repository Manager**.

If defining an image:

1. Press to bring out the Repository Manager in a separate window.
2. Click the folder, and then check the desired image. To preview it, click the file name directly.



3. Press **Select**. A new image editing window will be displayed. As the Image must be 150 x 150 pixels in size (system default), either check **Scale to Fit** to reduce the whole image to this size, or crop the image by dragging the mouse. The result of edting can be previewed on the right. Press **Save** to finish editing.



4. The final image will be shown on the right in the Catalog Editor.

There are a list of settings to further configure the Knowledge Center:

Setting	Description

Allow module launches in KC	Whether course modules can be launched from the KC.
Course link always launches the KC instead of the course.	If enabled, the course will be displayed with a "**Launch** " button on the Current Learning Modules page and Enrollments (Current Learning Format) widget instead of the "**Knowledge Center**" link. Clicking **Launch** will open the Knowledge Center.
AREA: Show assessment workflow area	# Whether to enable the Assessment Workflow Area.
AREA: Show certification area	# Whether to enable the Certification Area.
AREA: Show chat area	# Whether to enable the Chat Area.
AREA: Show contact list area	# Whether to enable the Contact List Area.
AREA: Show course summary area	# Whether to enable the Course Summary Area.
AREA: Show evaluation area	# Whether to enable the Evaluation Area.
AREA: Show forum area	# Whether to enable the Forum Area.
AREA: Show instructor list area	# Whether to enable the Instructor List Area.
AREA: Show news area	# Whether to enable the News Area.
AREA: Show notepad area	# Whether to enable the Notepad Area.
AREA: Show peer comments area	# Whether to enable the Peer Comments Area.
AREA: Show references area	# Whether to enable the References Area.
AREA: Show status change area	# Whether to enable the Status Change Area.
AREA: Show exam area	# Whether to enable the Exam Area.
AREA: Show About Me for the instructor	Whether to enable the the link to the "About Me" information for each instructor in the Instructor Area.
AREA: Show reference share area for instructors	# Whether to enable the File Share Area for Instructors.
AREA: Show file share area	# Whether to enable the File Share Area.
AREA: Show homework drop box	# Wheter to enable the Homework Drop Box.
AREA: Show marked/reviewed homework	# Whether to enable the the Homework Retrieval Area.
AREA: Show transcript area	# Whether to enable the Transcript Area.
AREA: Show quick evaluation area	# Whether to enable the Quick Evaluation Area.
AREA: Show Module Attributes	# Whether to enable the Module Attributes.

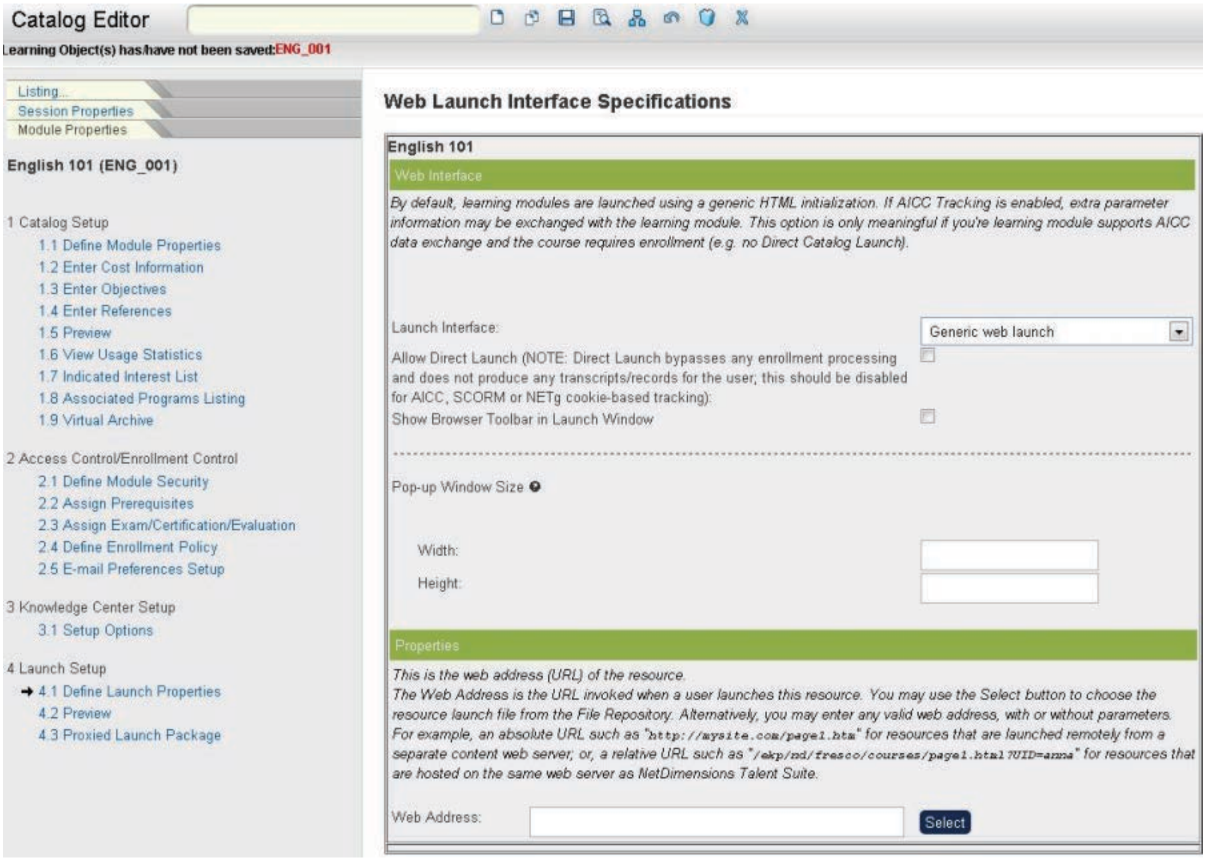
For Program Module, sort sub-modules by (Pull-down List)	**Required/Elective**: the sub-modules will be displayed in 2 separate sections (Required Modules and Elective Modules) **Defined Order**: the sub-modules will be displayed in one section. The order is the one which has been defined in the session properties. This is the default setting to define how the sub-modules of a Program displays in the KC. It can be changed later on a module-by-module basis in the catalog editor.

Note:

- # Set these options in the **Knowledge Center**, or on a module-by-module basis in the **Catalog Editor**. If not set, they are disabled for ALL modules.

Define Launch Properties

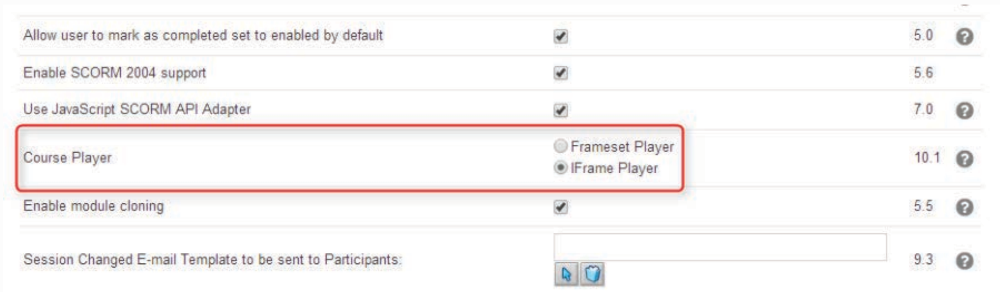
To configure how the learning module is launched and tracked, go to **Define Launch Properties** in the Catalog Editor.



1. Select the appropriate Launch Interface
2. Configure the size (height and width) of the Course Launch window (if not specified, the default settings defined in System Configuration will be used)

Course Player
Use of HTML4 framesets in course players can cause rendering problems for some courses.

The problem does not appear when using iframes. You can choose to use Framesets or iFrames via the "Course Player" system configuration:



Generic Web Launch

1. Select **Generic web launch** in the Launch Interface field.
2. If applicable, enable the **Allow Direct Launch** setting to allow users to launch the course directly
3. Enter Web Address i.e. the page invoked when the participant starts this learning module**.** This address, as long as it is a valid http address, can be entered with or without parameters. For example: nd/fresco/courses/page1.html?UID=anna.
4. Click the **Save** icon.

NETg cookie-based Tracking

Select the **NETg cookie-based tracking** option in the Launch Interface field. Additional options will be appended to the bottom of the *WEB Launch Interface Specifications* screen.

- Ensure that the direct launch function is disabled (i.e. The box by the Allow Direct Launch field is NOT checked.)
- To select the Launch URL, i.e. the page invoked when the participant starts this learning module, enter a valid http address in the Web Address field. (As long as it is a valid http address, it can be entered with or without parameters. For example: /nd/ fresco/courses/page1.html?UID=anna.)
- Choose whether you want to set the passing score by URL parameters. Click the **Yes**.
- Specify the location of the script file, click on the appropriate option.
- Click the **Save** icon.

AICC Assignable Unit

If you specify the AICC Assignable Unit option. AICC Tracking will be enabled and extra parameter information can be exchanged with the-learning module

- Select AICC Assignable Unit in the Launch Interface field. By making this selection, extra parameter information may be exchanged with the learning module. This option is only meaningful if your learning module supports AICC data exchange and the course requires enrollment (e.g. it cannot be launched directly from the catalog). The direct launch function is disabled.
- To select the Launch URL, i.e. the page invoked when the participant starts this learning module, enter a valid http address in the Web Address field. (As long as it is a valid http address, it can be entered with or without parameters. For example: /nd/ fresco/courses/page1.html?UID=anna.)
- For SkillSoft Business Skills Simulations only, tick the box to accumulate the time a learner spends in the module.
- Scroll down to specify the Optional Data.
- Click the **Save** icon.

SkillSoft Properties

To specify SkillSoft properties, select the **SkillSoft Net Download** option in the Launch Interface field.

- Click the box by the **Allow Direct Launch** field to allow users to launch the course directly.
- To select the Launch URL, i.e. the page invoked when the participant starts this learning module, enter a valid http address (with or without parameters) in the Web Address field. For example, the relative URL "/nts/nd/fresco/courses/page1.html?UID=anna" (where "nts" is the application name as installed on your server), or an absolute URL such as "http://mysite.com/page1.htm".
- Click the **Save** icon.

E-mail Launcher

To specify Email Launcher properties, select the **E-mail Launcher** option in the Launch Interface field.

- Click the box by the **Allow Direct Launch** field to allow users to launch the course directly.
- To select the Launch URL, i.e. the page invoked when the participant starts this learning module, enter a valid http address (with or without parameters) in the Web Address field.
- For example, the relative URL "/nts/nd/fresco/courses/page1.html?UID=anna" (where "nts" is the application name as installed on your server), or an absolute URL such as "http://mysite.com/page1.htm".
- Under the Properties section, select the E-mail Message Name.
- If you want the subject and the message to in the read only mode, tick the box after the text "Subject/Message read only for learner.
- Click the **Save** icon.

getAbstract Proxied Authentication

To specify getAbstract Proxied Authentication properties,

- Select the **getAbstractProxied Authentication** option in the Launch Interface field.
- Click the box by the **Allow Direct Launch** field to allow users to launch the course directly.
- To select the Launch URL, i.e. the page invoked when the participant starts this learning module, enter a valid http address (with or without parameters) in the Web Address field.
- For example, the relative URL "/nts/nd/fresco/courses/page1.html?UID=anna" (where "nts" is the application name as installed on your server), or an absolute URL such as "http://mysite.com/page1.htm".
- Enter the "U" value.
- Click the **Save** icon.

GlobalEnglish

To specify GlobalEnglish properties:

- Select the **GlobalEnglish** option in the Launch Interface field.
- Click the box by the **Allow Direct Launch** field to allow users to launch the course directly.
- To select the Launch URL, i.e. the page invoked when the participant starts this learning module, enter a valid http address (with or without parameters) in the Web Address field.
- For example, the relative URL "/nts/nd/fresco/courses/page1.html?UID=anna" (where "nts" is the application name as installed on your server), or an absolute URL such as "http://mysite.com/page1.htm".
- Enter the Keycode.
- Click the **Save** icon.

NetgLearning Proxied Authenctication

To specify NetgLearning Proxied Authentication properties:

- Select the **NetgLearning Proxied Authentication** option in the Launch Interface fiel
- Click the box by the **Allow Direct Launch** field to allow users to launch the course directly.
- To select the Launch URL, i.e. the page invoked when the participant starts this learning module, enter a valid http address (with or without parameters) in the Web Address field.
- For example, the relative URL "/nts/nd/fresco/courses/page1.html?UID=anna" (where "nts" is the

application name as installed on your server), or an absolute URL such as "http://mysite.com/page1.htm".
- Enter the Public Key and Private Key and then select the Destination.
- Click the **Save** icon.

Resource

To specify Resource properties:

- Select the **Resource** option in the Launch Interface field.
- Click the box by the **Allow Direct Launch** field to allow users to launch the course directly.
- To select the Launch URL, i.e. the page invoked when the participant starts this learning module, enter a valid http address (with or without parameters) in the Web Address field.
- For example, the relative URL "/nts/nd/fresco/courses/page1.html?UID=anna" (where "nts" is the application name as installed on your server), or an absolute URL such as "http://mysite.com/page1.htm".
- Under the Optional Properties enter the parameters, launch data, mastery score, maximum time allowed.
- You can also allow download by ticking the "Allow download" tick box.
- Click the **Save** icon.

Safari MD5Login Authentication

To specify Safari MD5Login Authentication properties:

- Select the **Safari MD5Login Authentication** option in the Launch Interface field.
- Click the box by the **Allow Direct Launch** field to allow users to launch the course directly.
- To select the Launch URL, i.e. the page invoked when the participant starts this learning module, enter a valid http address (with or without parameters) in the Web Address field.
- For example, the relative URL "/nts/nd/fresco/courses/page1.html?UID=anna" (where "nts" is the application name as installed on your server), or an absolute URL such as "http://mysite.com/page1.htm".
- Under the Safari properties, provide the Safara Host URL, UI Code, Target Page, Target Page Param, Partner Code, and Dummy Email Domain (optional).
- Click the **Save** icon.

Time Tracking HTML

To specify Time Tracking HTML properties:

- Select the **Time Tracking HTML** option in the Launch Interface field.
- Click the box by the **Allow Direct Launch** field to allow users to launch the course directly.
- To select the Launch URL, i.e. the page invoked when the participant starts this learning module, enter a valid http address (with or without parameters) in the Web Address field.
- For example, the relative URL "/nts/nd/fresco/courses/page1.html?UID=anna" (where "nts" is the application name as installed on your server), or an absolute URL such as "http://mysite.com/page1.htm".
- Click the **Save** icon.

Course Attempts

You can specify course attempts for courses. This determines the number of attempts a learner can have to achieve a passing score and complete the course. To configure, set the following:

1. ***Attempts Allowed Option***
   This option determines the maximum number of attempts a learner may have to complete the course. Possible values are 1-10 and *unlimited*, the default being unlimited. For a given learner's enrollment, the number of attempts allowed will be number set at the time of enrollment. This number may be reset for the learner upon publishing new revisions or by explicitly granting

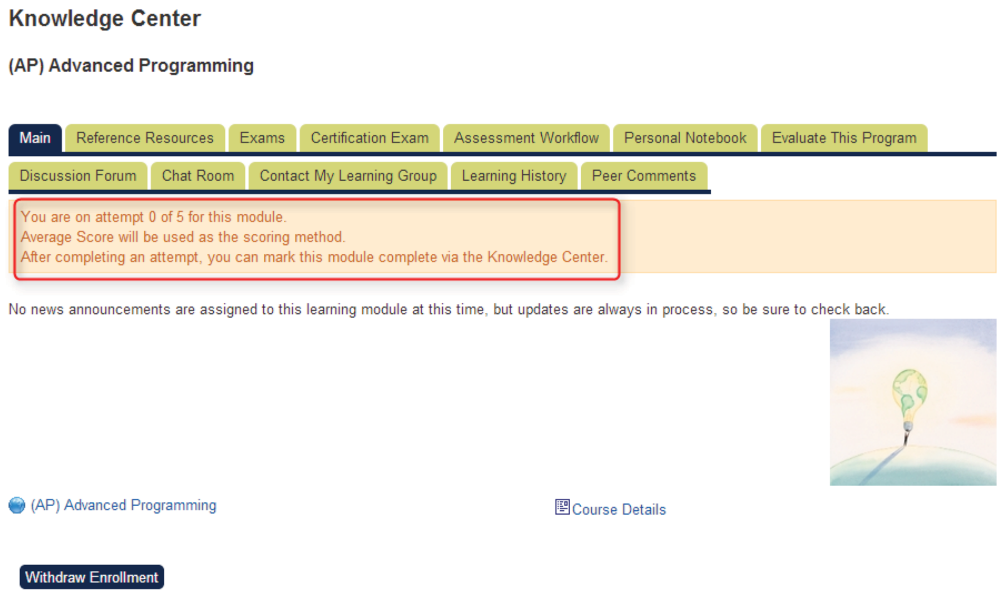
additional attempts. After exhausting the number of attempts, the learner's transcript status will be set to COMPLETED if there has been any successful attempt(s); it will be set to FAILED, otherwise. No more attempts will be consumed after a transcript is reopened.

2. ***Course Scoring Method***
   This option defines different ways of calculating the resulting score when there are multiple attempts. It has four possible values: Highest Score (default value), Average Score, First Score, and Last Score. Similar to the Attempts Allowed Option, the scoring method is captured for a transcript during enrollment and may only be reset upon publishing new revisions. While the resulting score will be displayed on a transcript, it will not affect the overall status of the transcript. As the name suggests, the course scoring method applies to a course, not an exam. The resulting score will be different for an exam score.
3. ***Course Completion* Method**
   This option allows a user to decide whether or not to consume all the maximum number of attempts for the course. This way, a learner can try to better a previously successful attempt. You can set the course to complete "Automatically on first successful attempt" or "Manually by the learner". Automatic completion is the default. It means that the course will be marked as completed automatically once a successful attempt is made. Manual completion means that the learner must manually mark the course as completed (if all attempts are not consumed). Similar to the *Attempts Allowed Option*, the course completion method will be captured for a transcript during enrollment and may only be reset upon publishing new revisions.

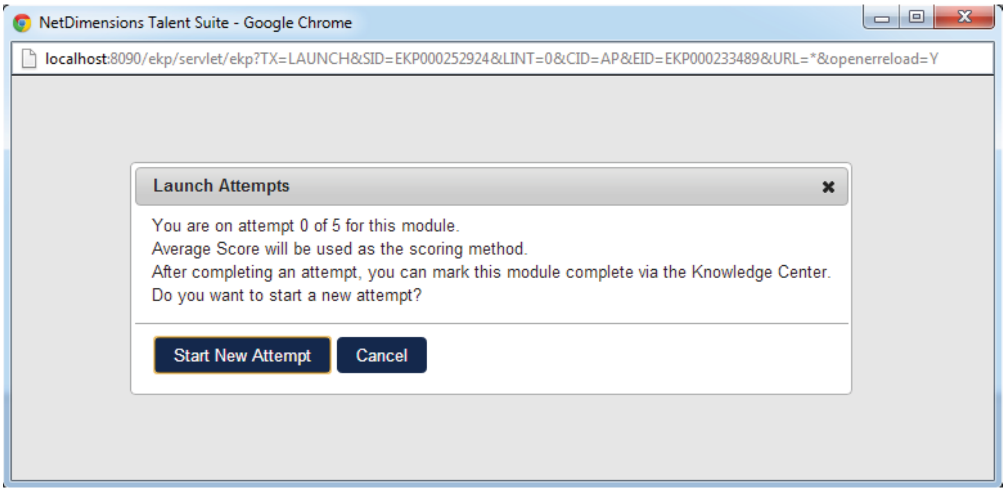
There are various places where attempt information will be displayed to a learner as the learner takes the course:

- The *Current Learning Modules* page shows the number of consumed attempts out of the maximum attempts for the learner.

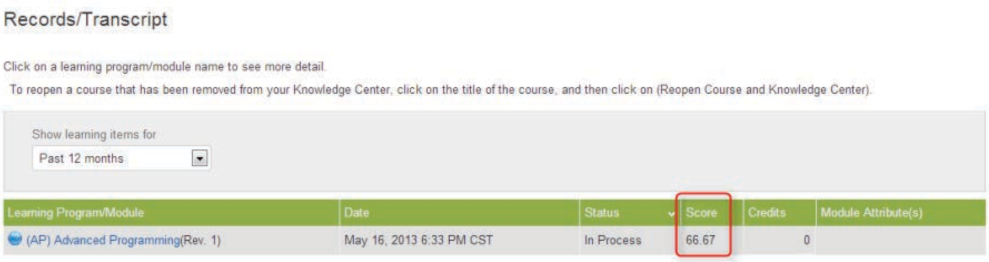
- When the learner goes to the Knowledge Center, the configurations regarding *Attempts Allowed*, *Scoring Method* and *Completion Method* will be detailed.



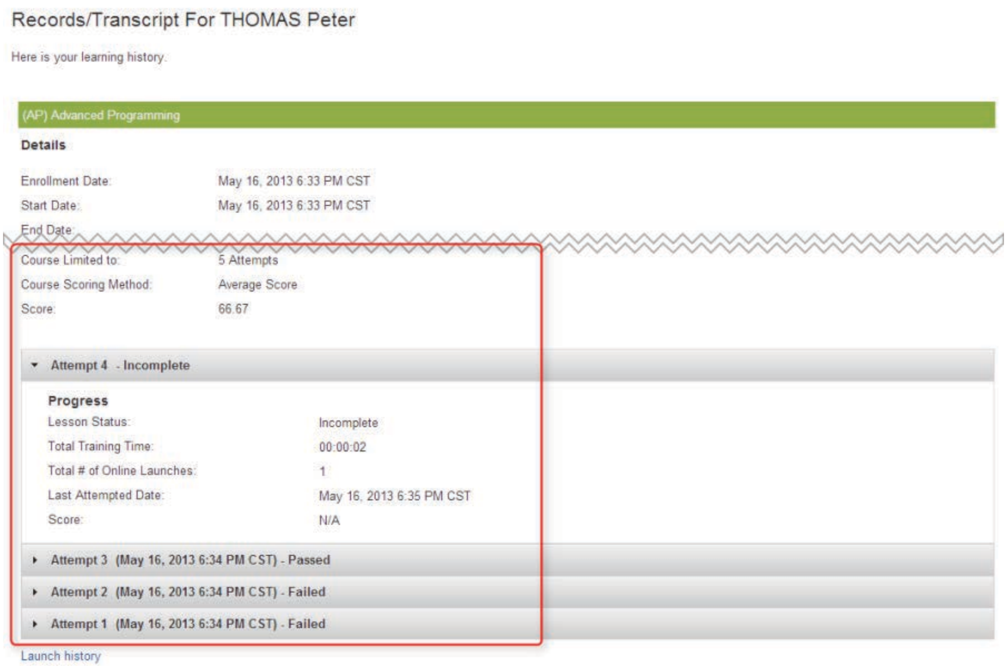
- Before launching the course, an alert popup box will be prompted to the learner, displaying information regarding *Attempts Allowed*, *Scoring Method* and *Completion Method:*



- After the learner completes an attempt, the resulting score will be displayed in the *Records/Transcript* list.

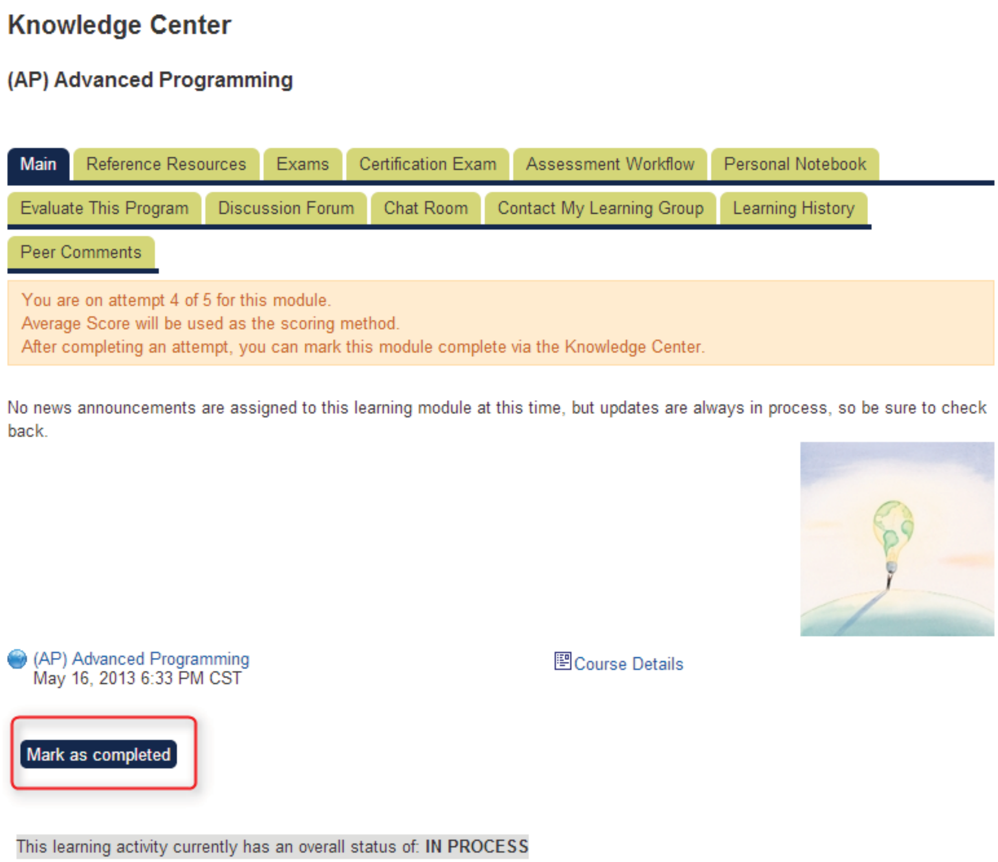


Additional interactions may also be shown per attempt if the learner takes a multi-sco course, depending on "Level of Visible Transcript Detail for Learners" system configuration. To continue recording learner progress after reopening a course, the administrator may enable the system configuration option, "Record progress after reopening a course".



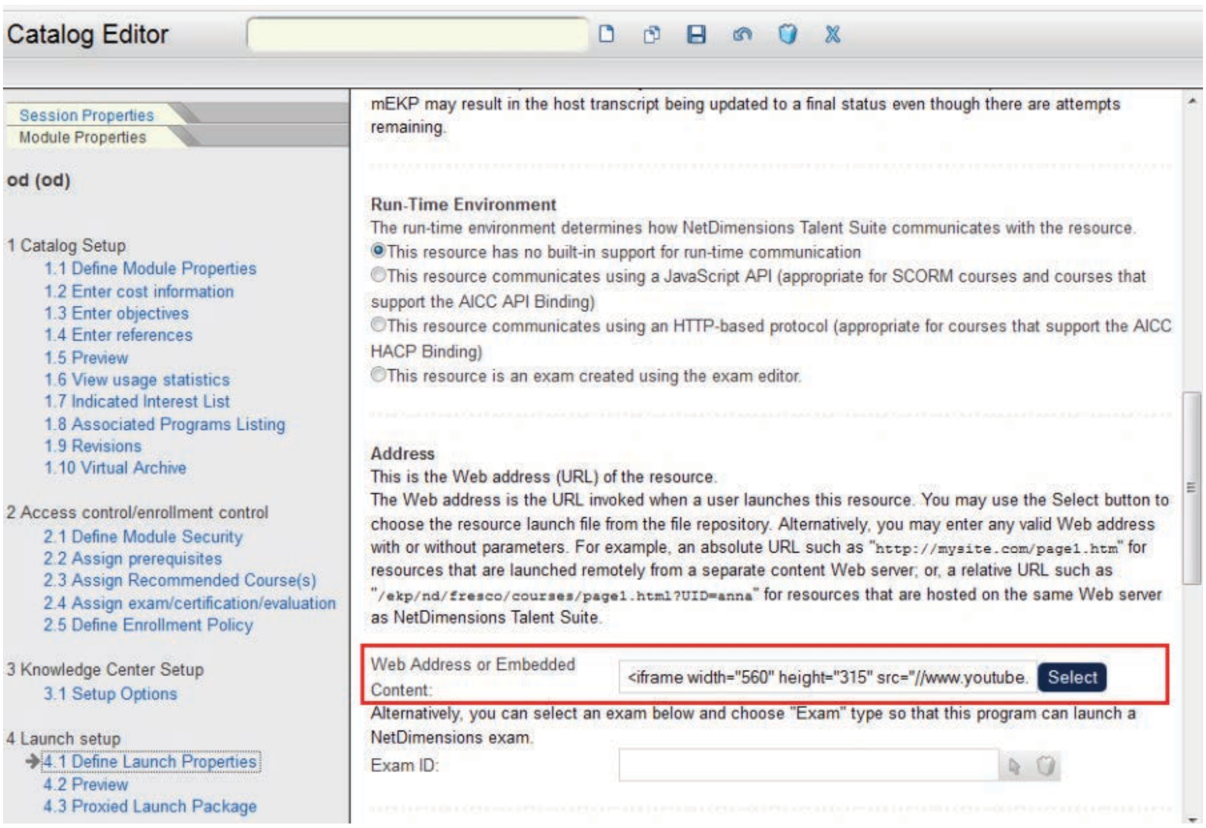
Transcript details for all attempts

If the manual completion method is used, the learner must manually *Mark As Completed* to complete the course after making a successful attempt.

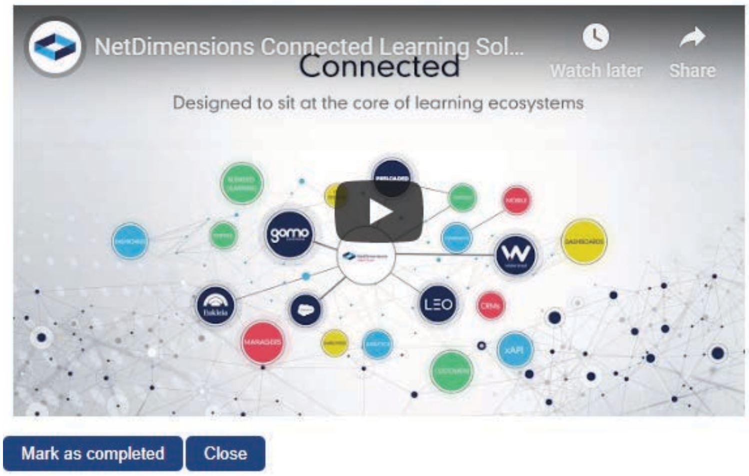


Embedded Content

Where supported, you can enter embedded content instead of a URL at "Web Address or Embedded Content":



For learners, the launcher will display the embedded content in the top frame with a "Mark As Completed" button in the bottom frame:

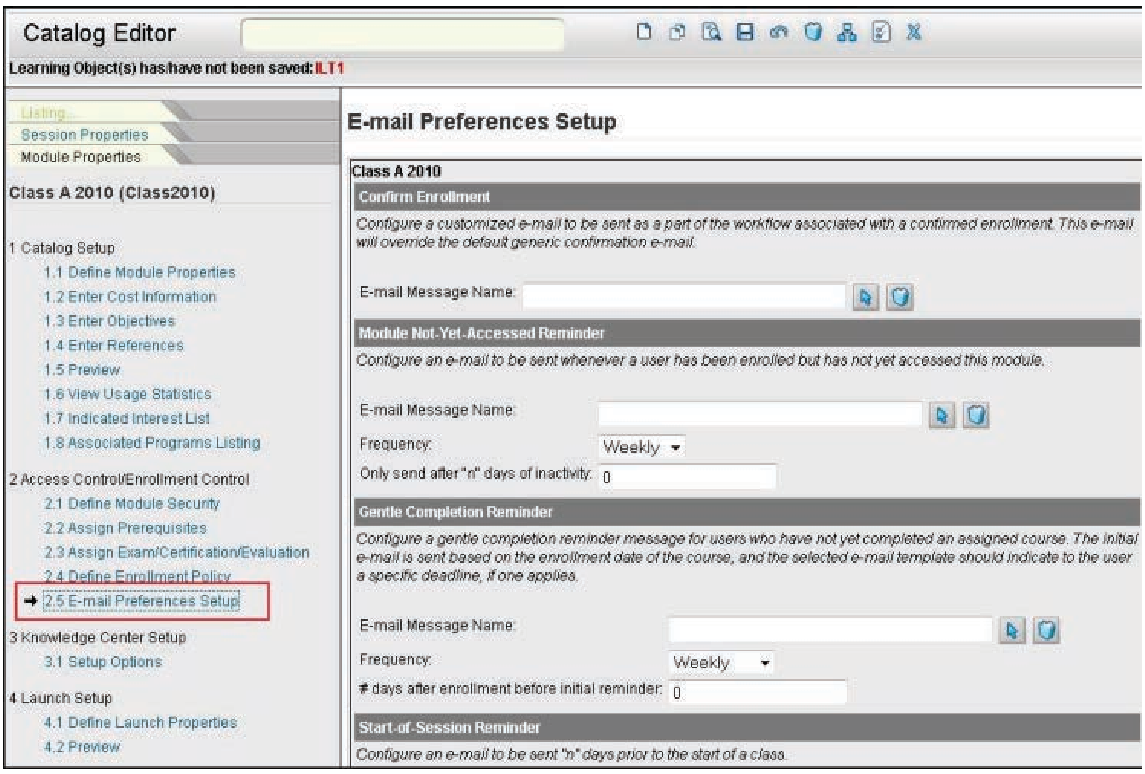


E-mail Preferences Setup

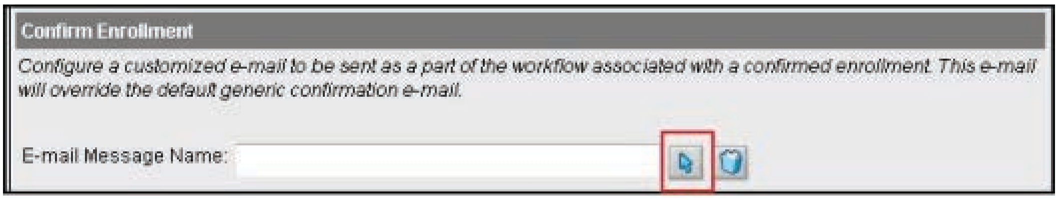
Selecting Email Templates

To define which messages are to be sent upon the triggering of certain events: (e.g. enrollment confirmation),

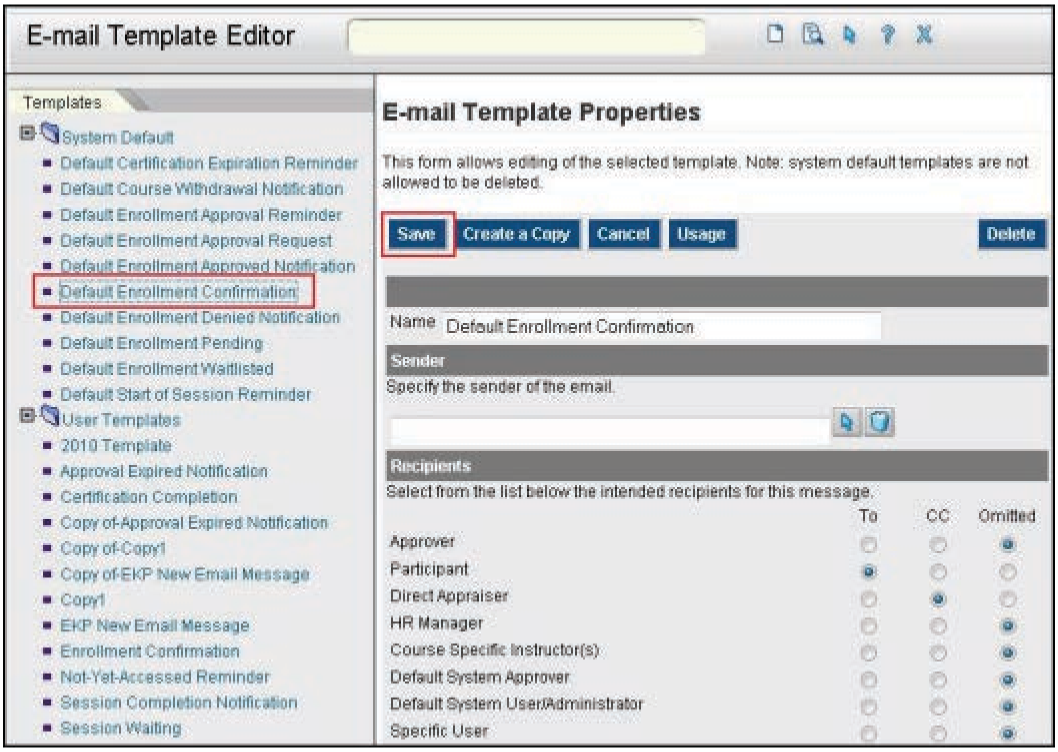
1. Go to E-mail Preferences Setup:



2. Click the Select icon by the Email Message Name field e.g.



3. Navigate to an appropriate e-mail template:



4. Make and save adjustments if necessary
5. Click arrow in the action panel to select the template

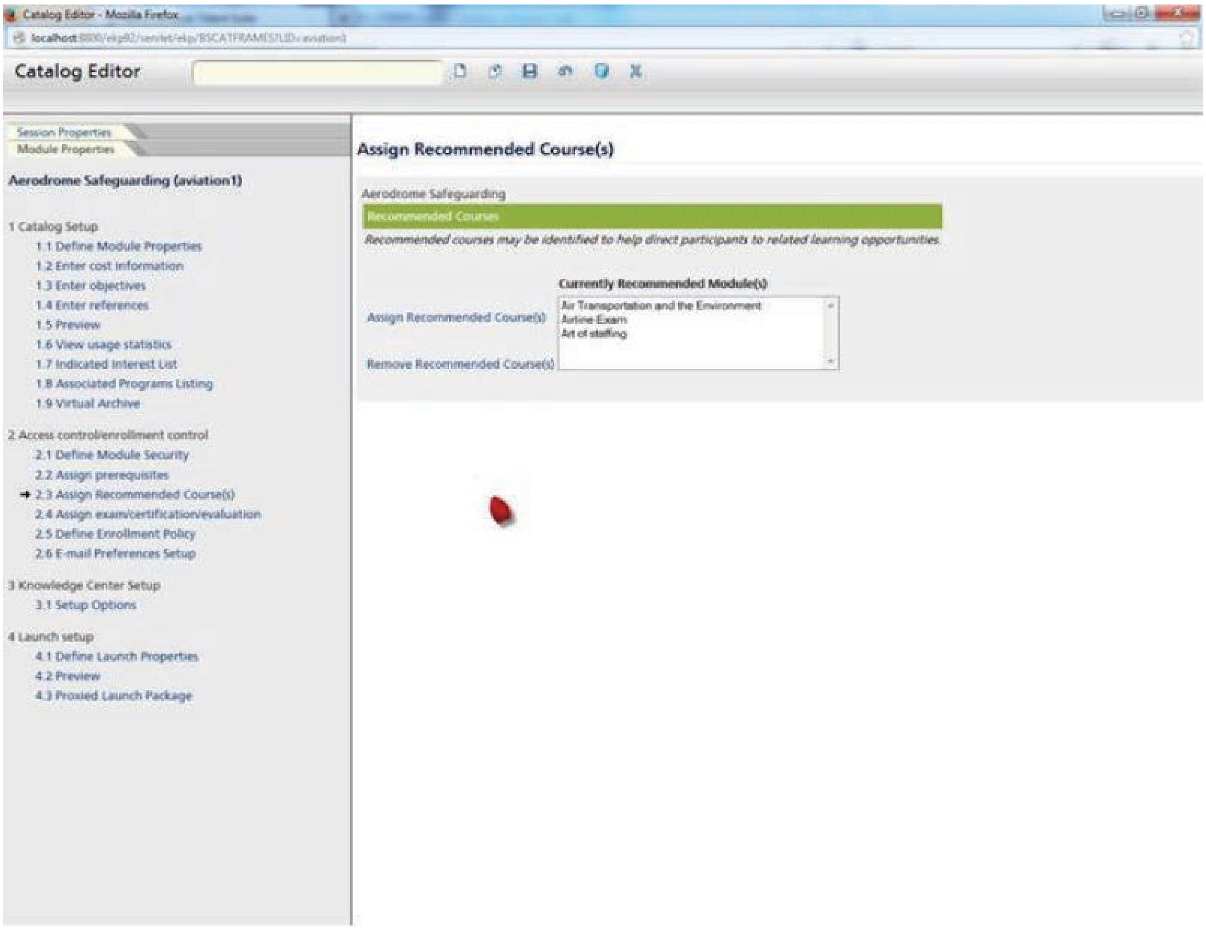
You can configure the following notifications to be sent automatically:

	Notification	Remarks
1	Enrollment Confirmation	
2	Module not yet accessed reminder	The options for reminder frequency are: Once, Daily, Weekly, Every 2 weeks and Monthly. You can specify when the notification should be sent in terms of the number of days of inactivity.
3	Gentle completion reminder	The options for reminder frequency are: Once, Daily, Weekly, Every 2 weeks and Monthly. You can specify when the notification should be first sent as the number of days after enrollment.
4	Start of Session reminder	You can specify when the notification should be sent as the number of days before session start date.

5	Post session reminder	Course specific instructors, default system approver, default system user/administrator, specific user and external e-mail only as supported recipients. Notification will be sent only when there are users with open transcripts in the session.
6	Escalation of Completion reminder	
7	Session Completion Notification	

Recommended Courses

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



Course Withdrawals

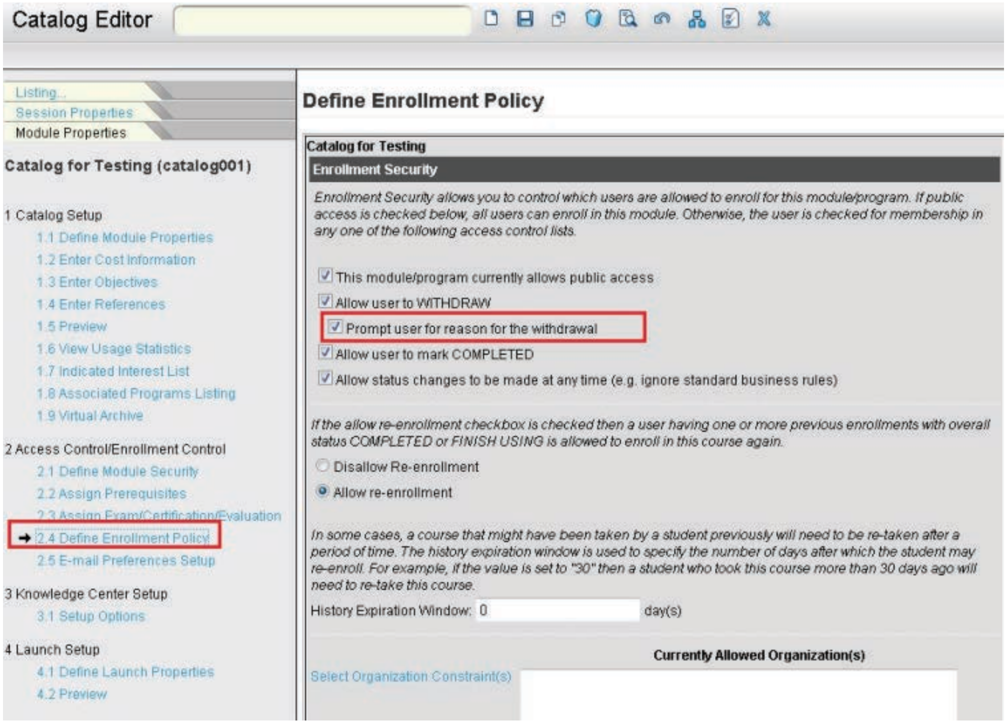
Configuring a Course for Withdrawal

(available for Performance and Learning only)

Sometimes, if a course is costly and an enrolled learner suddenly decides to withdraw from the course, it may be useful for the organizer to know the reason for the withdrawal. This new function is designed to allow such a reason to be captured during the withdrawal process. It is possible to capture the withdrawal reason for the case when the learner is already enrolled and also when the enrollment is awaiting approval.

To enable a course for withdrawal:

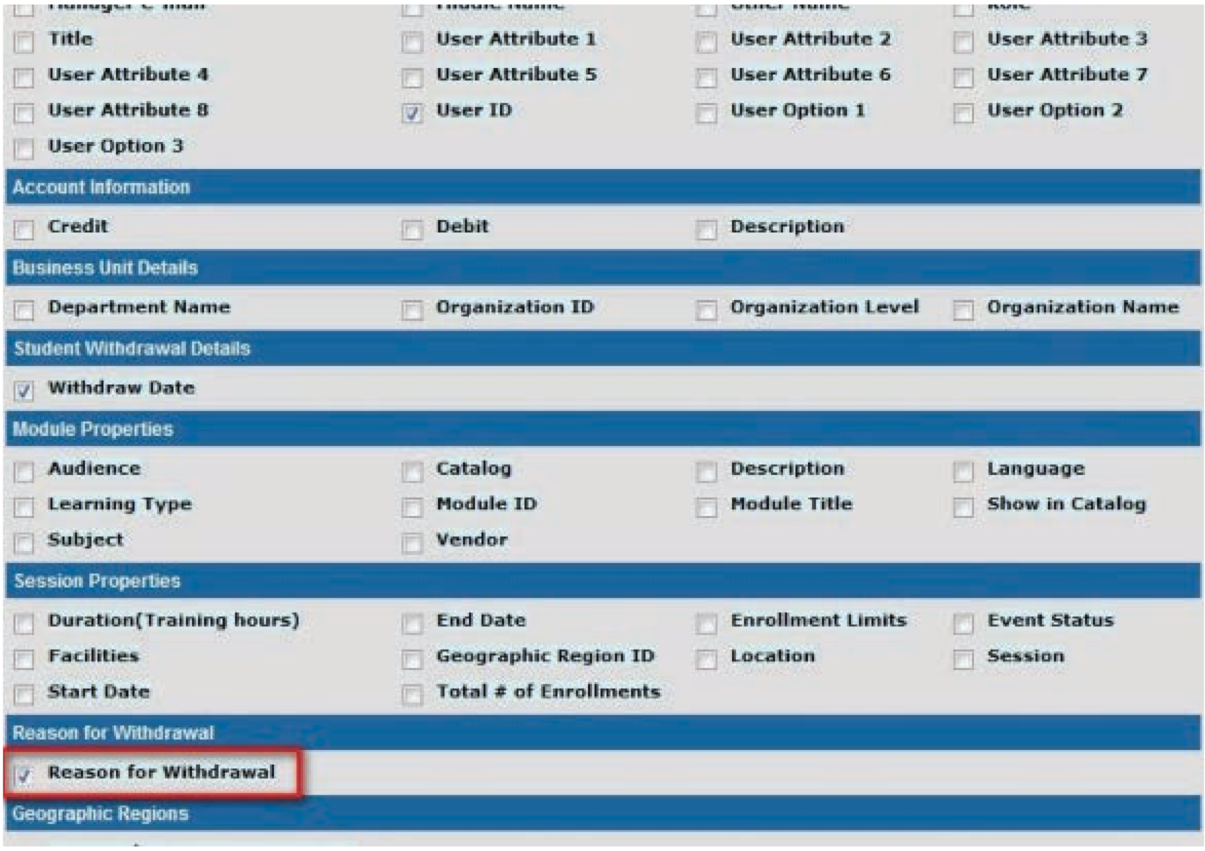
1. Access **Manage Center > Learning > Catalog General Settings > Learning Modules**.
2. Select a Learning Object.
3. Under the Module Properties tab, click **Define Enrollment Policy**.
4. Enable Allow user to WITHDRAW and optionally enable the Prompt user for reason for withdrawal checkboxes.



Withdrawal Reason
As the withdrawal reason is recorded against a learner's transcript record, it is important that in System Configuration, the option "Retain transcript records for student withdrawals" is enabled if this functionality is to be used.

Withdrawal Records

You can report on withdrawals via the Report Wizard Withdrawn User Details report type.



How withdrawals affect learner records will depend on the following system configurations:

1. Record all withdrawals (except withdrawals performed using the group withdrawal function)
2. Retain transcript records for user withdrawals or withdrawal equivalents.

Users who are "waitlisted" or "pending approval" do NOT have a withdrawal record created, as they are not yet considered enrolled.

The overall withdrawal logic is the same no matter where it is invoked, including user withdrawals via the KnowledgeCenter, and administrator status changes in the Catalog Editor Participants tab.

The one exception is the Group Withdrawal function with the Override indicator set. This Catalog Editor function is intended to remove all traces of an enrollment, and so will not record the individual withdraw records for each user when the override flag is checked.

Withdrawing From Programs

For the modules contained in the Learning Program:

1. If the module is completed or finished using, then its status will not change.
2. If the enrollment is shared, then status will also not change.
3. If the module is a Learning Object, and it is incomplete, then it is set as finished using.
4. For other cases, the module is withdrawn.

For the Learning Program:

1. If the Learning Program is completed or finished using, then its status will not change.
2. Otherwise, the Learning Program's status is set to withdrawn.

Learner Withdrawal

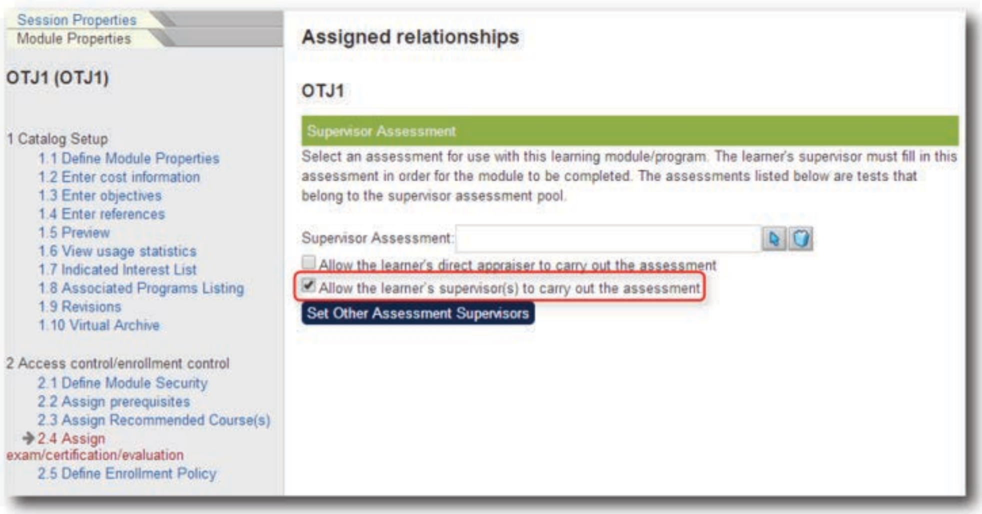
When a learner withdraws from an enrollment, they will be prompted to confirm and depending on configurations may

- Need to enter a Reason for Withdrawal
- See a withdrawal refund amount

On-the-Job-Training

(available for Performance and Learning)

The On-the-Job Training (OJT) learning type is designed to allow supervisors to assess the performance of users after they've completed some on-the- job training. The 'assign exam/certification/evaluation' screen allows you to assign 'supervisor assessment' type exams, intended to be completed by the supervisor. The learner cannot complete the course himself but depends on the assessment exam taken by the supervisor.



In addition to the assessment, you must specify who is eligible to complete the assessment:

- Enable "Allow the learner's direct appraiser to carry out the assessment" if the learner's direct appraiser is eligible
- Enable "Allow the learner's supervisor(s) to carry out the assessment" if supervisors are eligible

- "Set Other Assessment Supervisors" if you want to specify other parties

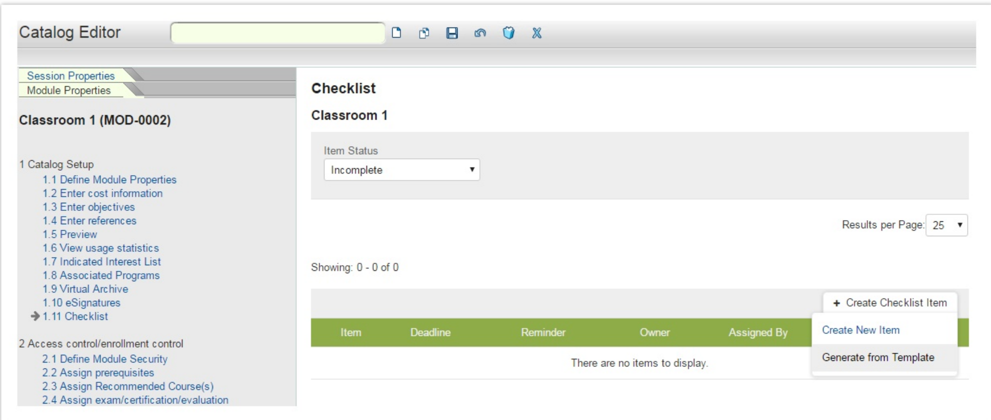
This option is also available in other places:

- In Catalog Editor, Session Properties > Participants, the course admin can use this new setting on a particular transcript.
- In Catalog Editor, Session Properties > Group Enroll, the course admin can use this new setting for one time during Group Enroll.
- In Workplace > Review, when reviewer click on "Assign learning module" from the gear icon on a reviewee record and assigning On-The-Job Training module.
- "enrollUser" api.

Course Checklists

Configuring Checklist Items

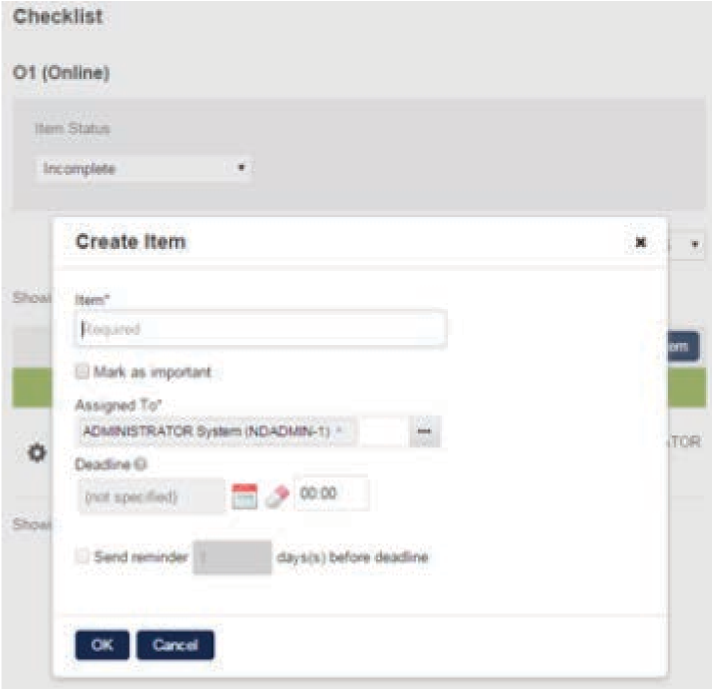
You can configure checklists to track preparatory tasks such as booking a venue for the class, plane tickets and hotels for participants. To configure checklists, go to Catalog Editor > Module Properties > Checklist. A similar interface is available under Session Properties, to configure checklist items specific to the session. You can choose to create your own checklist item or generate items from predefined templates:



Creating New Item

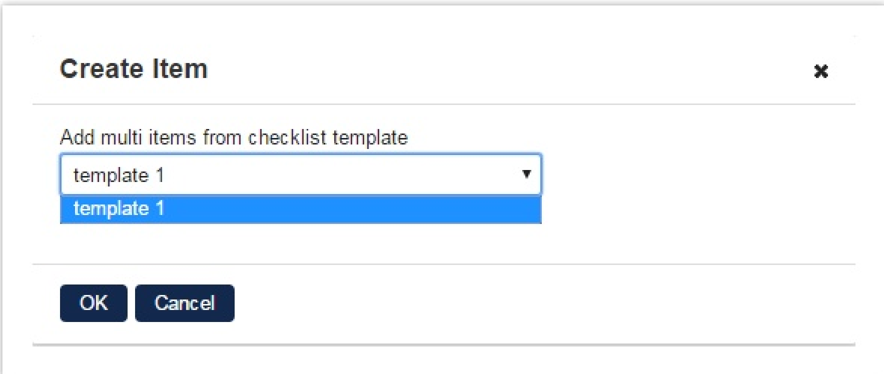
To add a new checklist item

1. Click "Create New Item"
2. Enter the item name, person to which the item is assigned to, the deadline to complete, importance, and an optional expiry reminder.



Generating From Template

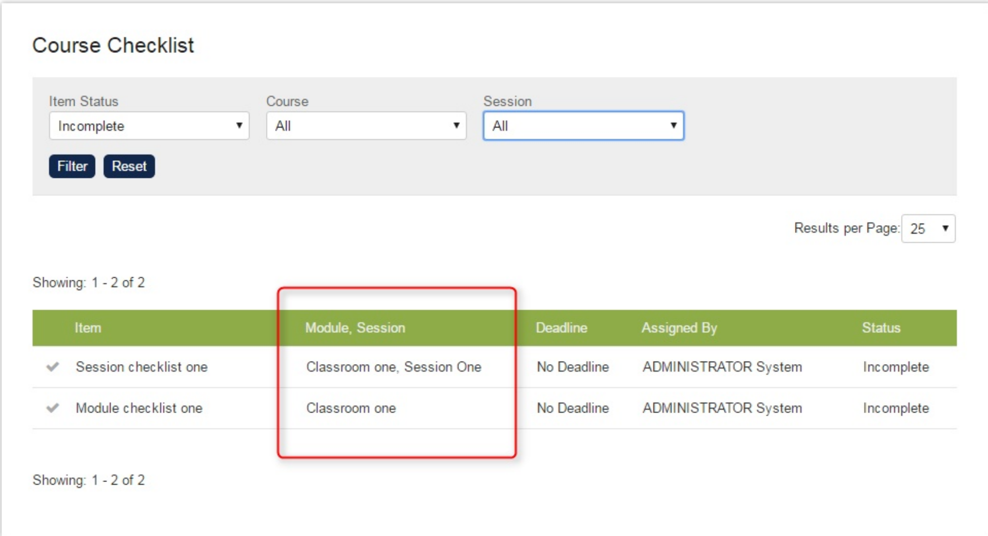
In **Catalog Editor > Checklist**, if you generate items from template, you will be presented with a list of templates to choose from:



You can edit the checklist item details, mark as in/complete, or delete the checklist item through the gear button.

Reviewing Checklist Items

You can view all checklist items assigned to you under **Workspace > Course Checklist:**



Role access is required in order for the user to see this menu and it can be configured under **Manage Center > Users > Roles > Role Access Control**.

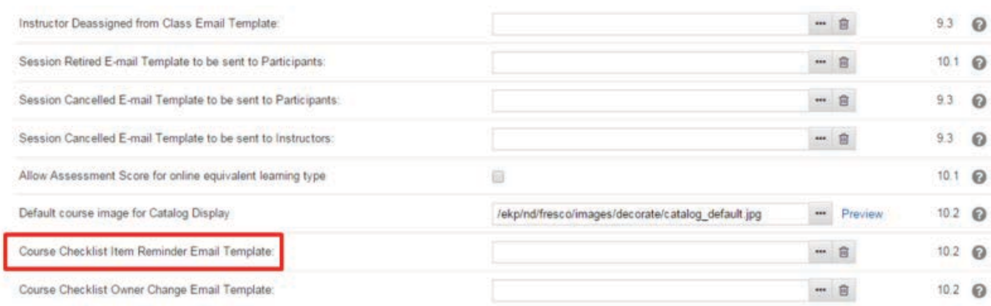
- No access: Course Checklist will be hidden from the Workspace menu.
- Read-only: Course Checklist will be available under the Workspace menu, but the content is only readable.
- Unrestricted: Course Checklist will be available under the Workspace menu, and user can also mark items as complete.

To mark a checklist item as complete, tick off the box on the first column of the table. After marking it as complete, the checklist item will be deactivated and crossed out. An Administrator can also see that this item has been marked complete in the Catalog Editor with the relevant meta data information. An item that is complete can be reactivated for followup if required .

For a **module** checklist item, only the module title is shown; for **session** checklist, both module and session title (or session code if session title absent) will appear.

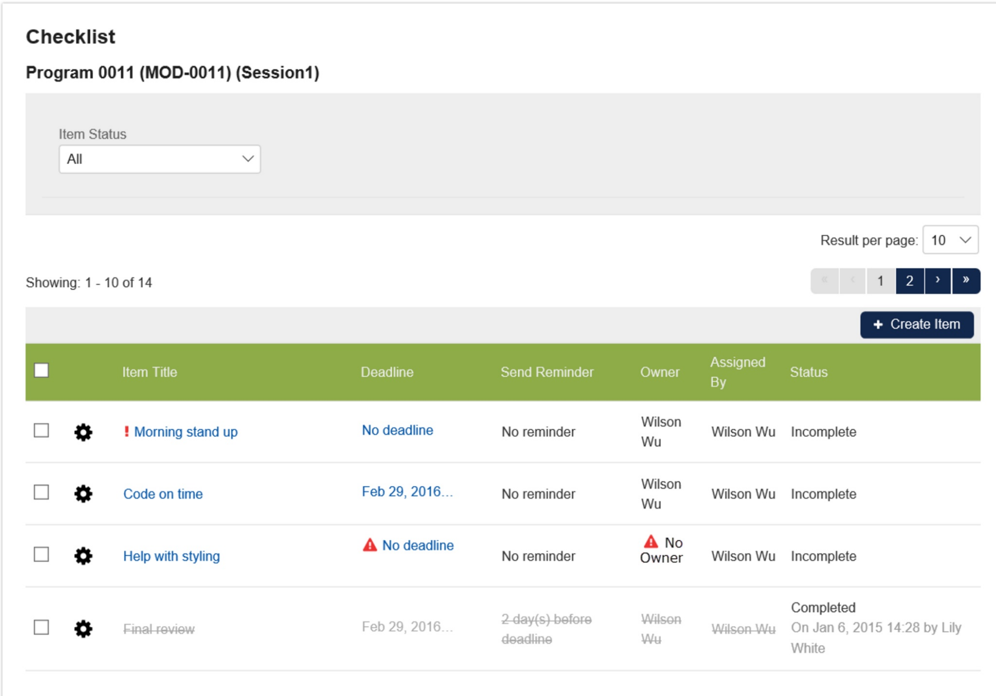
Assigning Checklist Item Owner

Course Administrators can assign an individual as owner of a checklist item. To delegate to another user, select the user in the "*Assigned To*" field and save the checklist item. Ownership can change as long as the item is still active.



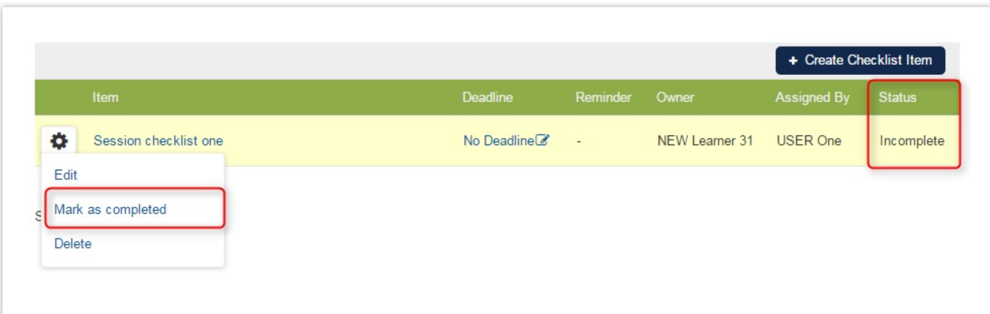
The selected user will receive an email on the checklist item ownership change. To select the email template, go to **Manage Center > System > General Settings > System Configuration > Catalog** an d choose one to be used as the course checklist owner change email.

The notification email of the course checklist ownership updates in real-time whenever there's a change made. There is no delayed background task for sending the email.

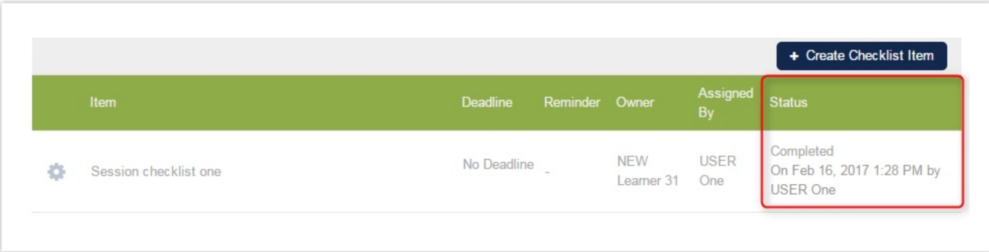


Option to mark a checklist item as completed in Catalog Editor

Aside from Checklist Item Owners being able to mark items as *Completed,* Course Administrators can also do this via the Catalog Editor regardless if they are the assigned owner or not. Provided that the Administrator has Module or Session write permissions, they will see an option **"Mark as completed"** / **"Mark as incomplete"** under the gear icon in the module or session level checklist page.

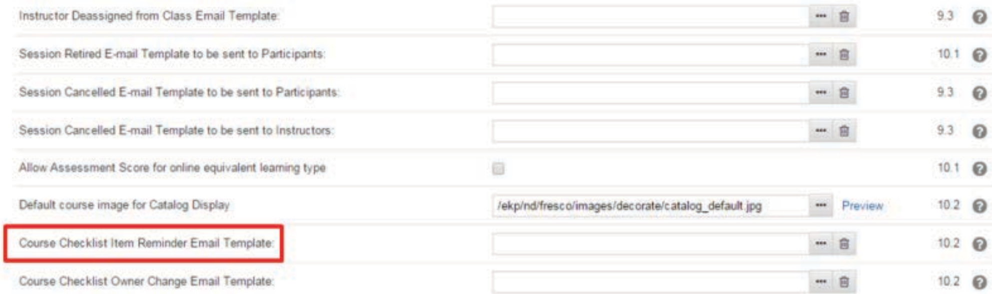


A new status column is added to checklist table. For completed items, the date and the user who completed this will also be shown in the status column.

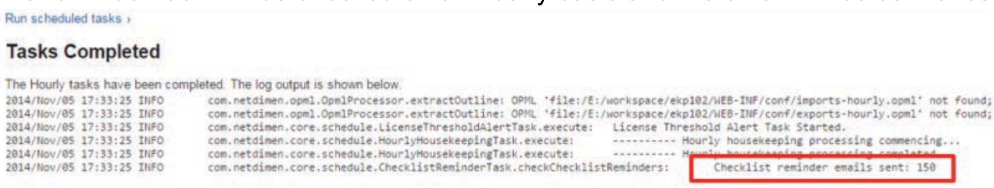


Checklist Item Reminder Notification

If the checklist item has a deadline and the reminder option is on, the system will send an email to the owner. To select the email template, go to **Manage Center > System > General Settings > System Configuration > Catalog** and choose an email template to be used as the course checklist item reminder email.

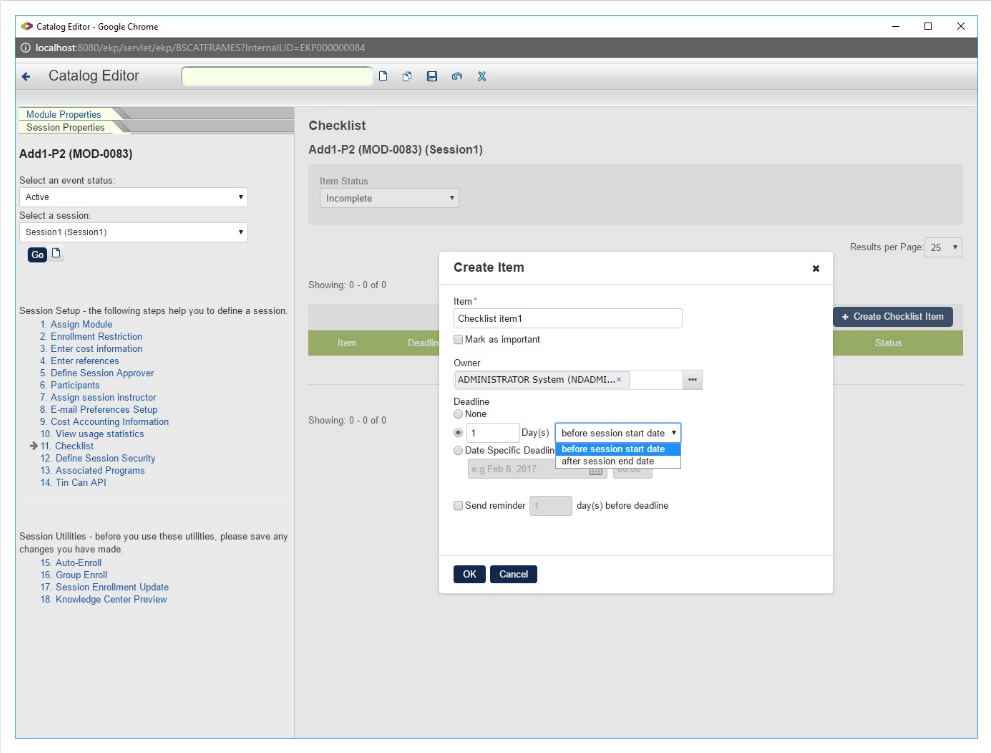


The reminder task will be checked on an hourly basis and the email will be sent once for the reminder.



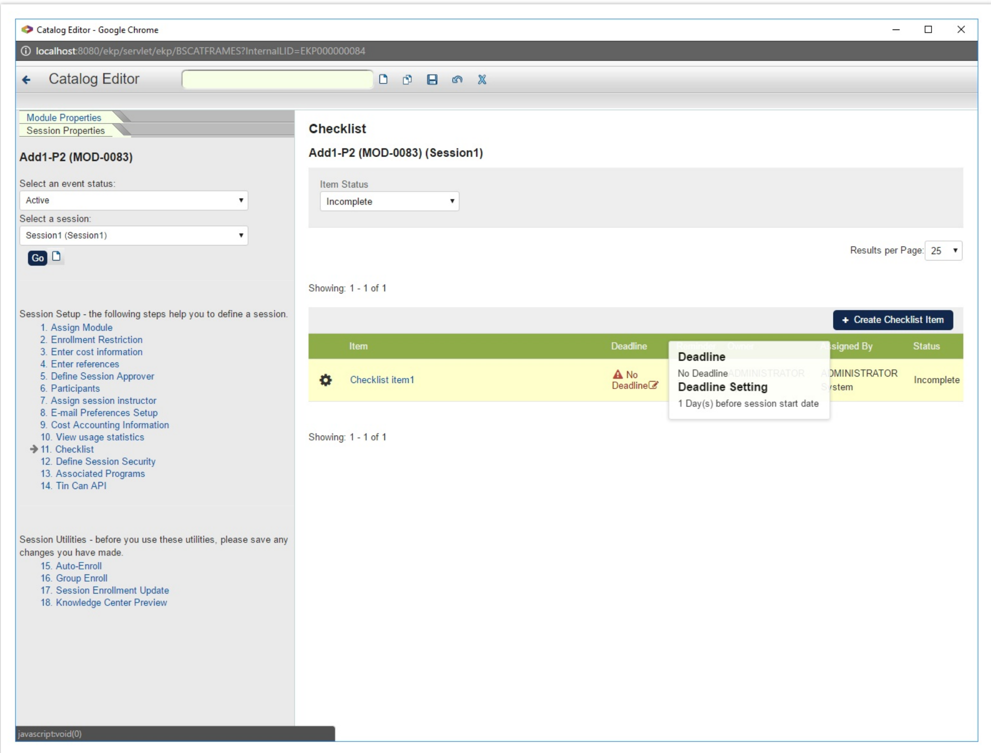
Relative Deadlines for Checklist Items

To provide more flexibility to set the deadline beside a fixed date, users can configure the deadline of the checklist item (relative to the session start date /end date) when creating this at Session level. Note that for online learning modules, this option would only be available when the system configuration ***"In catalog editor, show start date and end date fields for online modules"*** is enabled.

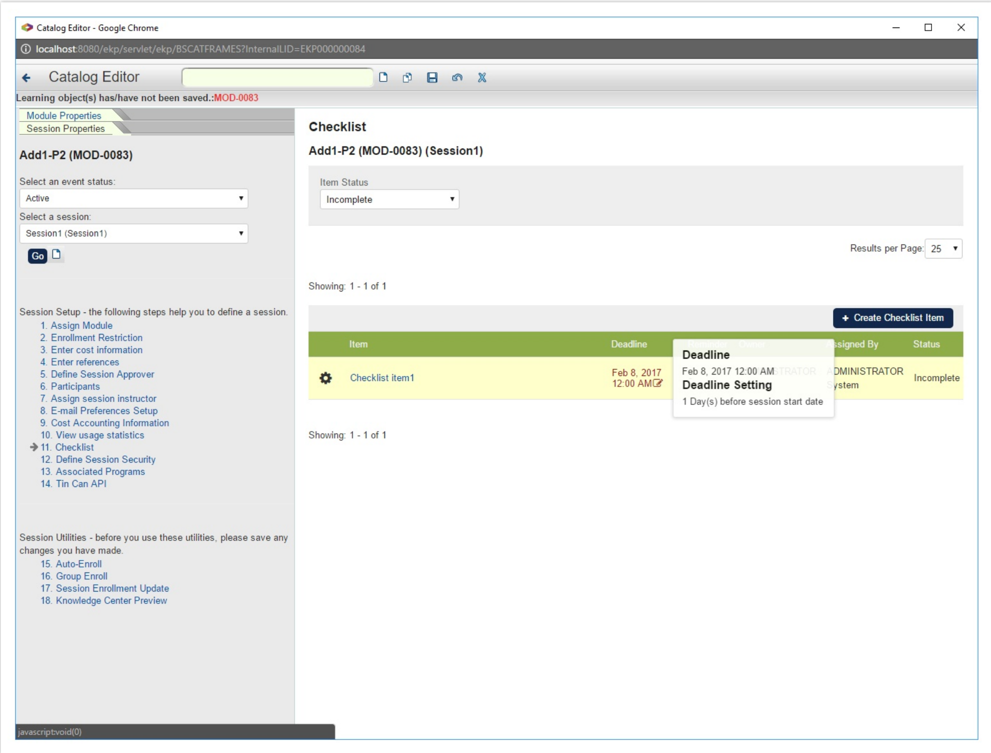


Display of deadline information in the checklist table

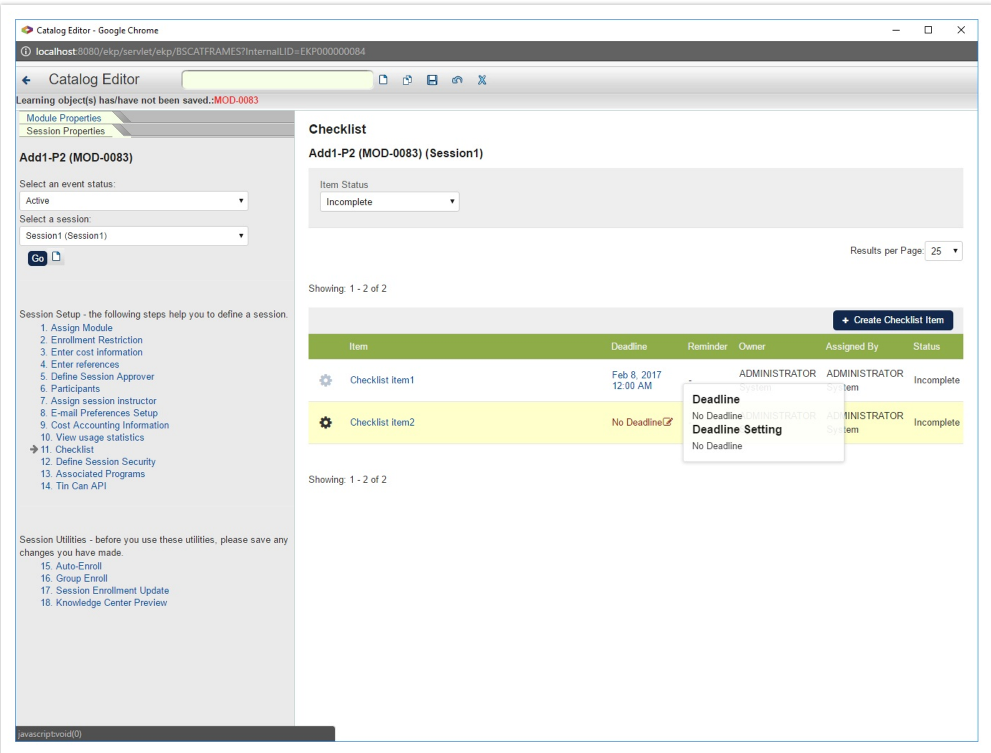
When the session start date/end date *has not yet been set*, a **"No deadline"** entry is displayed but with a red triangle alert icon would be seen under the Deadline Column. Upon mousing over, more information about the deadline settings is displayed.



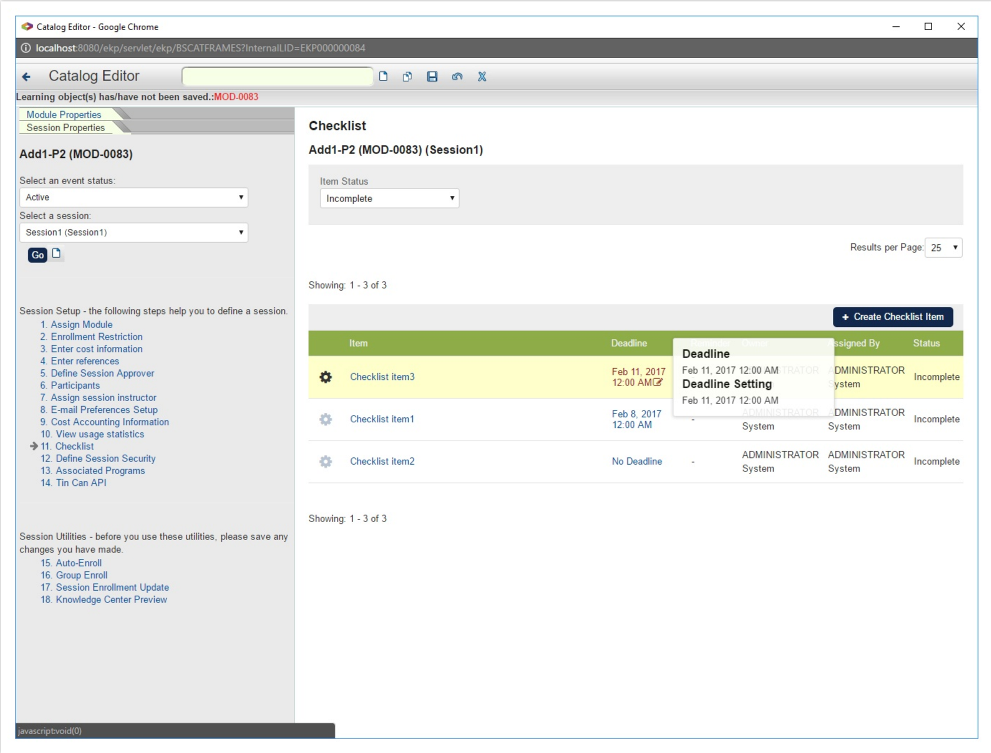
If the session start date/end date *is set*, the deadline will be calculated and displayed under the "Deadline" column. Upon mouse over, more information about the deadline settings is displayed.



If no deadline is selected, a **"No Deadline"** entry will be shown under the Deadline column.

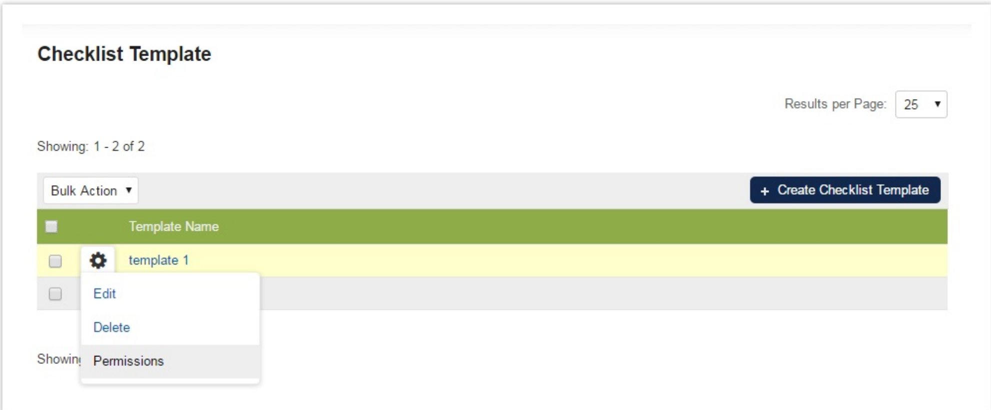


If a specific deadline is set, it will appear under the Deadline column as well.



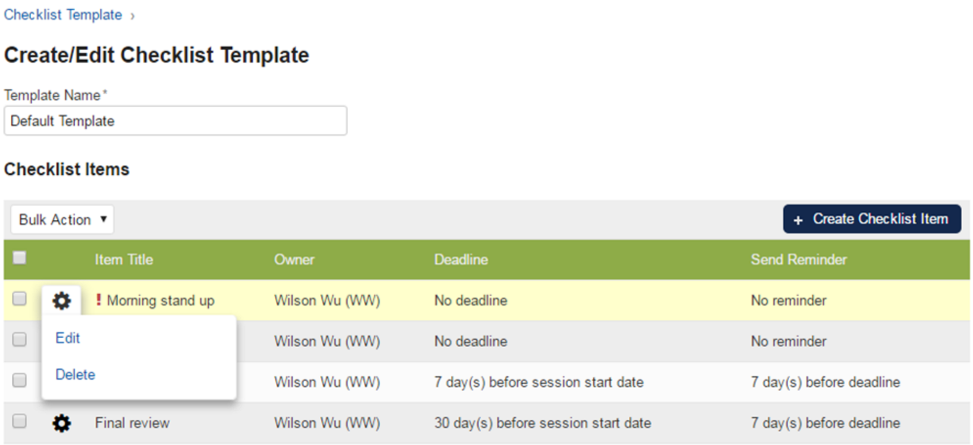
Checklist Templates

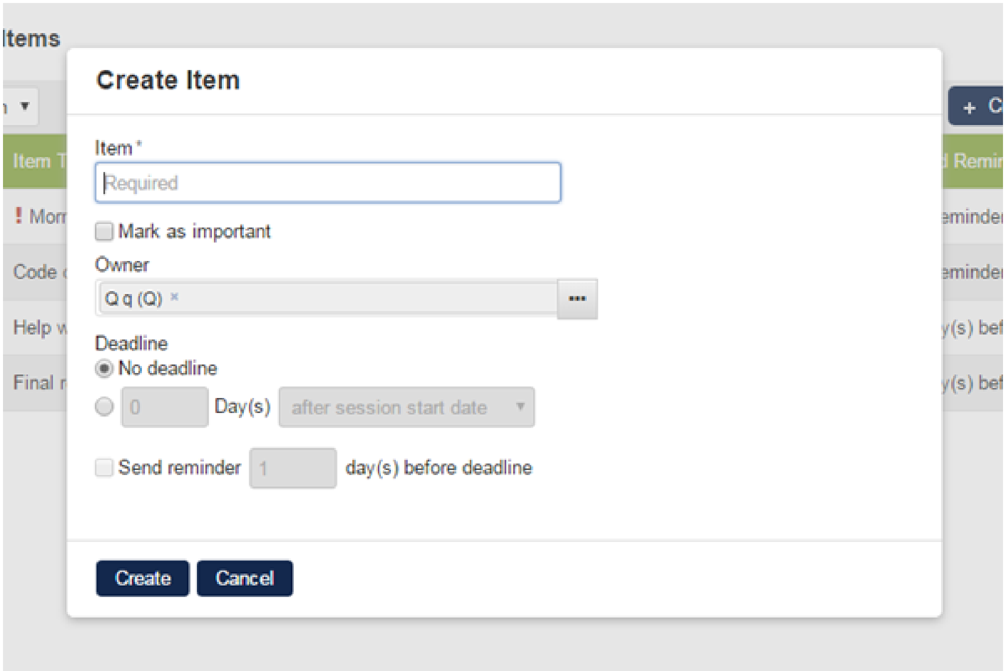
You can create checklist templates for checklist items that need to be created often. Checklist Templates are managed at Manage > Checklist Templates. Here you can View/Edit, Delete, or set Template Permissions:



Creating Checklist Template Item

You can create or edit the checklist template as shown below:



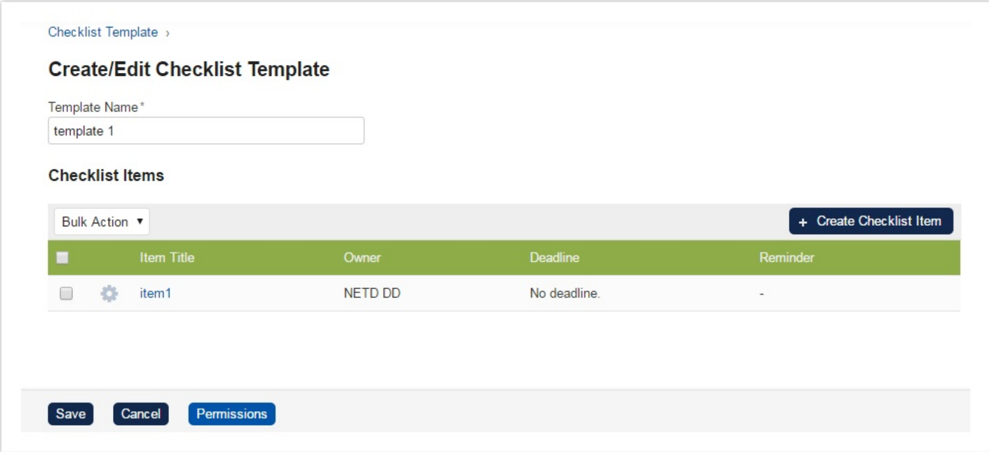


Permissions for Checklist Templates

Standard Read and Write Permissions are available for checklist templates. Permission on checklist templates controls whether Administrators can:

- see and update the checklist template itself, in the Manage Checklist Template page.
- see and use the checklist template in the Catalog Editor > Checklist page.

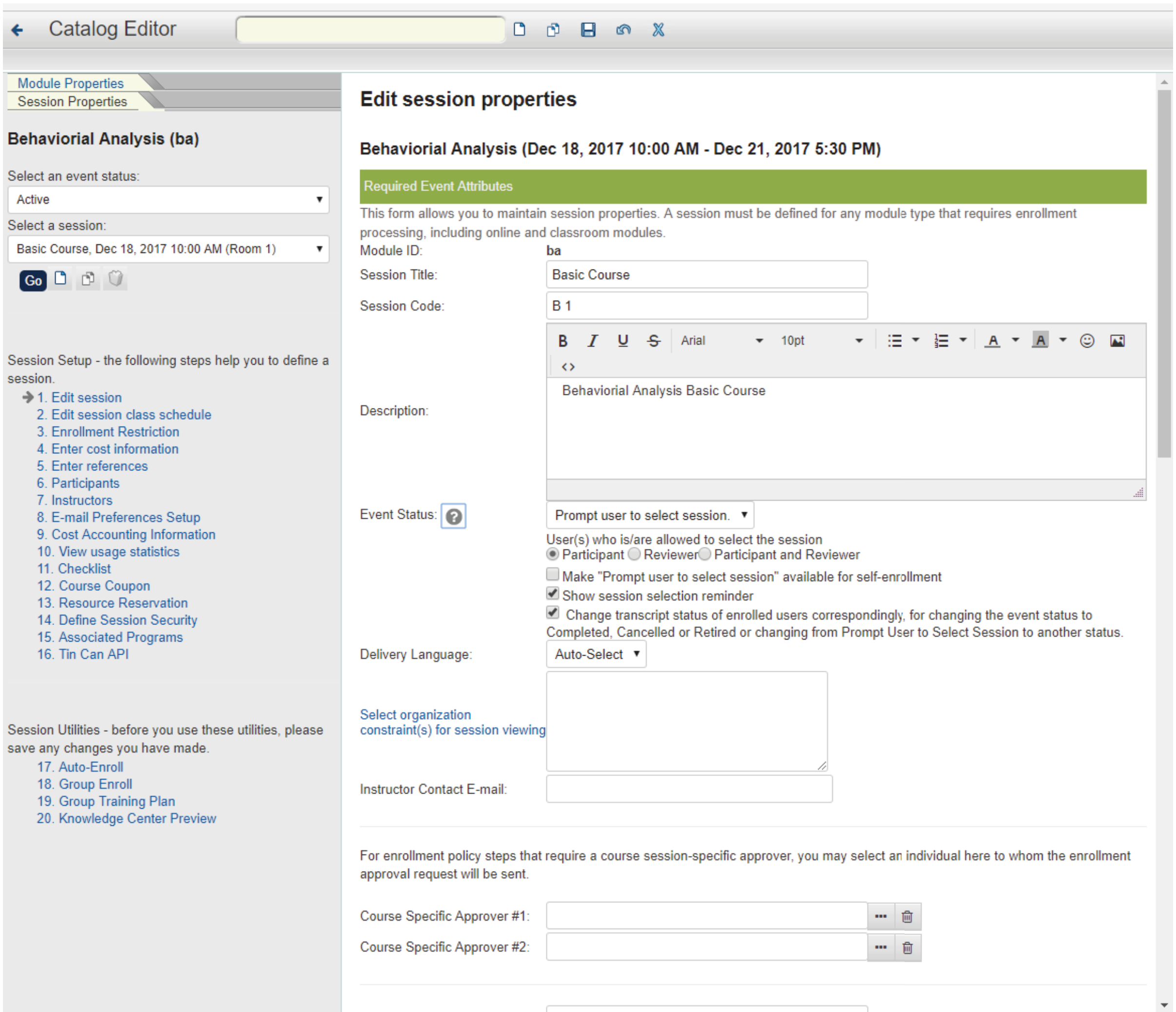
The Permissions Selector is accessible both as a drop down feature under the gear icon and as an option in the Checklist Template detail page.


Checklist Template ›
Create/Edit Checklist Template
Template Name*
template 1
Checklist Items
Bulk Action
+ Create Checklist Item
Item Title
Owner
Deadline
Reminder
item1
NETD DD
No deadline.
-
Save
Cancel
Permissions

Session Properties

Defining Session Properties

To configure, go to **Session Properties** in the Catalog Editor. To add a new session, click the **Add Session** icon.



Required Event Attributes

The properties will vary depending on the learning type.

Session Property	Description
Session Title	The title of the session
Session Code	The code of the session
Description	A description that will appear in the catalog and available as an email template parameter

Event Status	• Active - The session is available for enrollment • Pending - Typically used when preparing a session and not available for enrollment • Completed - The session has taken place and ended • Closed - The session is not available for enrollment • Cancelled- The session was scheduled but has since been cancelled • Invitation Only - Users may not directly enroll in this session and must be added by an administrator • Prompt User to Select Session - The session is used as a "placeholder" for assigning a course to Users. After it has been assigned, Learners or Reviewers can select an ACTIVE session • Retired - This course has been retired and any currently enrolled online session will no longer be launchable • Ended - This session is not available for self-enrollment. Classroom training sessions can be configured to automatically switch to this status once their end date has passed
User(s) who is/are allowed to select the session	• Participant • Reviewer • Participant and Reviewer
Make "Prompt user to select session" available for self-enrollment	Once enabled, a "placeholder" session will be available for enrollment by the Learners themselves or via Reviewers. The session will also be shown in the catalog for self-enrollment.
Show session selection reminder	Once checked, the System will show a session selection reminder to the participant at each login.
Change transcript status of enrolled users correspondingly, for changing the event status to Completed, Cancelled or Retired or changing from Prompt User to Select Session to another status	Update the status on the transcripts of the enrolled users according to the changes in event status
Delivery Language	An activated System Language or Auto Select
Select organization constraint(s)	• No organizations configured for the organization constraints makes the session visible to all organizations. • Organization constraints apply only to module sessions and not program sessions therefore it is possible for users who are not members of the specified organizations to enroll onto the restricted session if it is part of a program.
Instructor Contact Email	The instructor's contact email address
Course Specific Approver #1/#2	For enrollment policy steps that require a course session-specific approver, you may select an individual here to whom the enrollment approval request will be sent.
Comments	Any comments about the session
Enrollment Limits	• **Min**: The minimum value of enrollment. • **Max**: **Fixed** - The fixed maximum value of enrollment / **Based on facility size/capacity -** The maximum value based on the capacity of the facility.

Reserve seats for learner enrollments pending approval	If checked, Learners with a Pending Approval status will be reserved a seat at the time of enrollment as long as the limits have not been reached according to the "first come, first served" logic. The **Default Reserve seats for learner enrollments pending approval** Setting under System Configuration > General determines whether this option will be set as the default.
Total Enrollment #	Total number of current enrollments
Cannot withdraw within	Specify the number of days before the starting date of the session that an enrollee(s) can withdraw his/her enrollment.
Waitlist Handling	• Automatic Upgrade • Manual (Administrator) Upgrade • Waitlist all learners • No waitlist If System Configuration > General > Clean-up waitlist automatically is enabled, the waitlist will be automatically cleaned up once the enrollment period is over or the session has started. And the System will set the Overall Status of waitlisted users to Dropped from Waitlist. The "**Dropped from Waitlist Notification**" can be configured in Catalog Editor > Module Properties > Access control/enrollment control > E-mail Preferences Setup. The notification will be sent to the Learners who have been dropped from the waitlist either automatically or manually.
Dropped from waitlist handling: Transfer users dropped from waitlist to the following session	If enabled, the users with a "Dropped from Waitlist" status will be automatically transferred to the selected session from the drop-down menu during manual or automatic waitlist clean-up tasks. Note : The selected session has to be of the **Active**, **Pending**, **Invitation Only**, or **Prompt User to Select Session** status**.**
Credits	Specify the credits for the session.
Institution	Specify an institution that provides the training
Enrollment Begin Date and Enrollment Deadline	Specify the start and end time of the enrollment period.
Due date of Homework	Specify the due date for homework.

Module Completion Deadlines

Session Property	Description
On enrollment, calculate deadline as follows:	• **No deadline, these will be set manually per learner if necessary**. • (Value) **Days from Enrollment. (0 implies unlimited)** - Specify the number of days from the enrollment allowed to complete the module. • **Date Specific Deadline** - Specify the module completion deadline. **Note:** new deadline settings must be explicitly applied to the selected learners in order for the new deadline to be reflected in their transcripts.

Once the deadline against a transcript has passed	• Do nothing, the deadline was just for reference • Set transcript to DEADLINE EXPIRED and block learner from launching the course • Block learner from launching other courses until they complete this course
View Participant Deadlines	View the list of participant's status and deadlines. Participant deadlines are calculated on enrollment thus changing the deadline alone will not affect the deadlines for existing course participants. A change in the course completion deadlines can be applied to learner transcripts with the following statuses: • Waitlisted • Not Started • In Process • Pending Approval

Collaboration Tools

Session Property	Description
Forum	Link a **Forum Category** or **Single Forum** to the session so that the Learners and Instructors can access the session level forum / category through Knowledge Center.

Additional Session Attributes

Assign values to any configured session attributes.

Workflow Assignments

Session Property	Description
Select a workflow template.	Assign a workflow template to the session.
Disable workflow assignment for this session.	If checked, all workflow will be ignored for the enrollment of this session. When a user enrolls in the course, the System will look for the correct workflow for the enrollment and assign the exam/evaluation in the workflow to the user. It will be accessible to Learners from Exam/Evaluation area in the Knowledge Center.

Facility Capacity for Enrollment Limits

(available for Performance and Learning only)

Certain learning types, e.g. Classroom, allow class sessions to be set-up, with each class session located at a physical location (or facility).

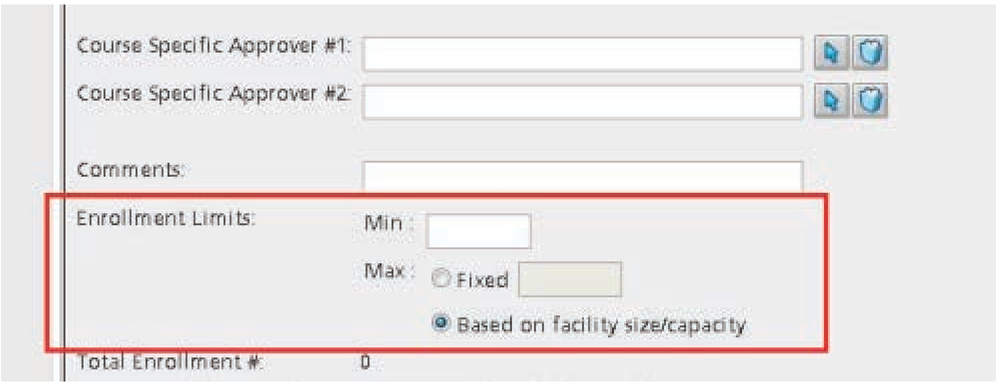
Currently the LMS allows a session to have either no seat limit or a limit with a fixed value. This limit has no relation to the number of seats available at the session's facility.

In the situation where a facility begins to host more than one classroom course at the same time, it becomes useful to take the location's seat capacity into account when determining the maximum enrollment limit because different groups of learners need to share the same set of seats. Moreover, a course withdrawal for one course could trigger the auto-enrollment of a wait-listed learner in a different course.

This enhancement is designed to deal with this complex situation.

For a session of a course that can have a physical location associated with it, the Enrollment Maximum Limit can now take one of two values:

1. Fixed - this offers the previous fixed limit behaviour; setting it to zero or leaving it blank means there is no maximum limit.
2. Based on facility size/capacity - this is a new option that uses the associated class facility's maximum number of seats as the maximum limit. The enrollment limit also takes into consideration other enrollments that might have taken place for some other courses using the same facility at the same time. For brevity, we can refer to the session as having a "dynamic" enrollment limit. If a facility's maximum number of seats is set to zero, this is interpreted as not having any limit.



Seats Remaining Calculation Logic

Suppose a course session is using the dynamic enrollment limit and all its separate classes are held at one facility. If there are other sessions sharing the same facility at the same time, the seats remaining for this session can be described by the following formula:

```
remaining seats = facility capacity - max { total no. of enrollments in a
particular period of all the sessions' class schedules }
```

However, if the course session's classes are held in different facilities, then the calculation becomes:

```
remaining seats = min {
facility capacity - max { total no. of enrollments in a particular period
of the sessions' class schedules }
} of all facilities involved in the session
```

Scenario A

Facility F1 has only 3 seats.
Sessions S1, S2 and S3 have classes all located at F1 on the same day, with their schedules overlapping. Suppose that each session has 1 learner enrolled.

The following diagrams show the classes' start and end times and how they overlap.

Example 1:
S1 (10:00-11:30) ------------------------
S2 (09:00-11:00) ------------------------
S3 (10:45-12:00) ------------------------

In this example, since there is a period in time when all 3 classes are in the same facility, all 3 seats in the facility have effectively been used up and no more enrollment can be accepted for any of the 3 sessions.

Example 2:
S1 (10:00-11:30) ------------------------
S2 (09:00-11:00) ------------------------
S3 (11:15-12:30) ----------------------

In this example, at any point in time, there is at most 2 learners in the facility, therefore, the number of seats which remain available for enrollment is 1.

Scenario B

Let's consider the more complicated scenario where one session has 2 classes held at different facilities.
Facility F1 has 3 seats. Facility F2 also has 3 seats.
Sessions S1, S2 and S3 each has a class located at F1 on Day 1, with their schedules overlapping.
Suppose that each session has 1 learner enrolled.
Session S1 has an additional class located at F2 on Day 2.
The following diagrams show the classes' start and end times and how they overlap.
Example 1:
At facility F1 on Day 1,
S1 (10:00-11:30) ------------------------
S2 (09:00-11:00) ------------------------
S3 (11:15-12:30) -----------------------
At facility F2 on Day 2,
S1 (10:00-11:30) ------------------------
In order to work out the number of seats remaining for enrollment for session S1, we need to consider the seats remaining for each of its classes and take the minimum value. For the class held at F1, the seats remaining is 1 (as explained in Scenario A's second example); for the class held at F2, the seats remaining is 2. Therefore the seats remaining for enrollment for session S1 is 1.

Scenario C

Facility F1 has 3 seats.
Sessions S1, S2 and S3 have classes located at F1 on Day 1, with their schedules overlapping.
Suppose each session has 1 learner enrolled.
In addition, S1 has another class located at F1 on Day 2, same as for another session S4 which has 2 learners enrolled.
At facility F1 on Day 1,
S1 (10:00-11:30) ------------------------
S2 (09:00-11:00) ------------------------
S3 (11:15-12:30) -----------------------
At facility F1 on Day 2,
S1 (10:00-11:30) ----------------------
S4 (09:00-11:00) =========================
In this example, since no more enrollment is possible for S1 on Day 2, it is not possible to enroll

another learner for S1 even though a seat is available on Day 1.
Note that the timezone set at the session level is taken into consideration when working out class schedule overlap. It must be ensured that this is set appropriately for the facility in question.

Consequences

This enhancement affects the following places:

1. The available number of seats for enrollment, as displayed in NetDimensions Performance application or retrieved via the API.
2. The enrollment process
3. Wait-list handling: in the example provided in Scenario C, if wait-listing is enabled with automatic upgrade, and one of the enrolled learners decides to withdraw from session S4, then it is possible for a wait-listed learner of either S1 or S4 to become enrolled. The order of the upgrade depends on who joined the wait-list first.

Wait-list Upgrade

Here is a more complicated scenario involving wait-list upgrade.
Facility F1 has 5 seats.
Session SA has a fixed enrollment limit of 2 while session SB has a dynamic enrollment limit.
Their classes are both located at F1 at the same time and both sessions have the wait-list option set to "Automatic Upgrade&quot". Suppose 2 learners are enrolled in session SA and 3 learners are enrolled in session SB. Further enrollment attempts will result in learners being wait-listed.
The following examples show how the order in which learners are wait-listed can affect the auto-upgrade result.

Example 1:
Learner B attempts to enroll onto session SB and is wait-listed.
Learner A attempts to enroll onto session SA and is wait-listed.
Now if a learner withdraws from session SA, both learners A and B will be upgraded and become enrolled onto sessions SA and SB respectively. This is because the upgrade logic considers all wait-listed users in both sessions SA and SB since they are located at F1:
As learner B is wait-listed before learner A, he is considered first with session SB's dynamic enrollment limit in mind. A spare seat at the facility F1 means learner B can become enrolled.
Now learner A is considered using the fixed enrollment limit of 2. After the withdrawal, there is only 1 learner in session SA so learner A is upgraded.

Example 2:
Learner A attempts to enroll onto session SA and is wait-listed.
Learner B attempts to enroll onto session SB and is wait-listed.
In this situation, if a learner withdraws from session SA, only learner A is upgraded:
As learner A is wait-listed before learner B, he is considered first with session SA's fixed enrollment limit in mind. After the withdrawal, there is only 1 learner in session SA so learner A is upgraded.
Now learner B is considered using the dynamic enrollment limit in mind. After the enrollment of learner A, the facility is full again so learner B remains wait-listed.
However, if instead, a learner withdraws from session SB, only learner B is upgraded:
As learner A is wait-listed before learner B, he is considered first with session SA's fixed enrollment limit in mind. As there are still 2 learners in session SA, learner A remains wait-listed.
Now learner B is considered using the dynamic enrollment limit in mind. A spare seat at the facility F1 means learner B can become enrolled.

Assumptions and Limitations

1. A course session's classes should not overlap in time.
2. When summing up the total number of enrollments at a particular time, we take the number from

each session separately, so if the same user is enrolled onto both sessions, s/he will be counted twice. In practice, a user should not be able to attend 2 sessions at the same time, even if they are at the same facility.

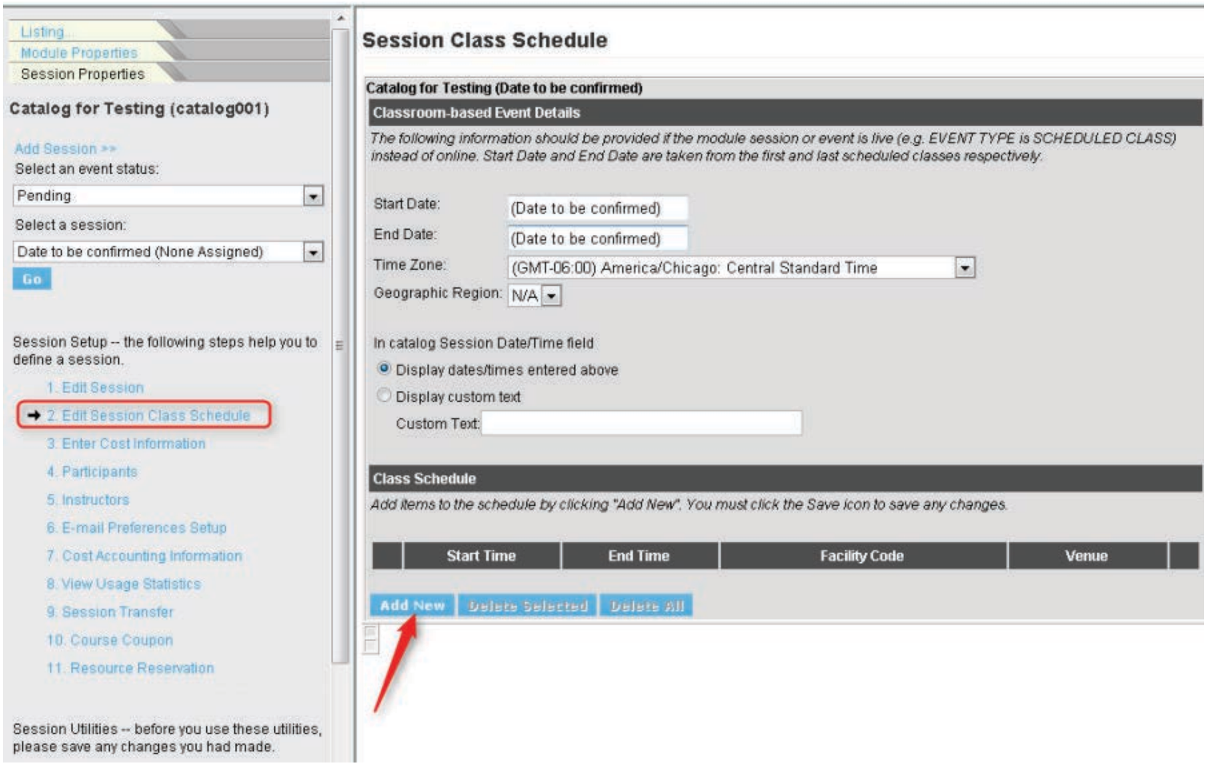
3. Wait-list upgrade is not automatically invoked after the maximum number of seats for a facility is increased. It is expected that this value will not frequently change.

Configuring a Class Schedule

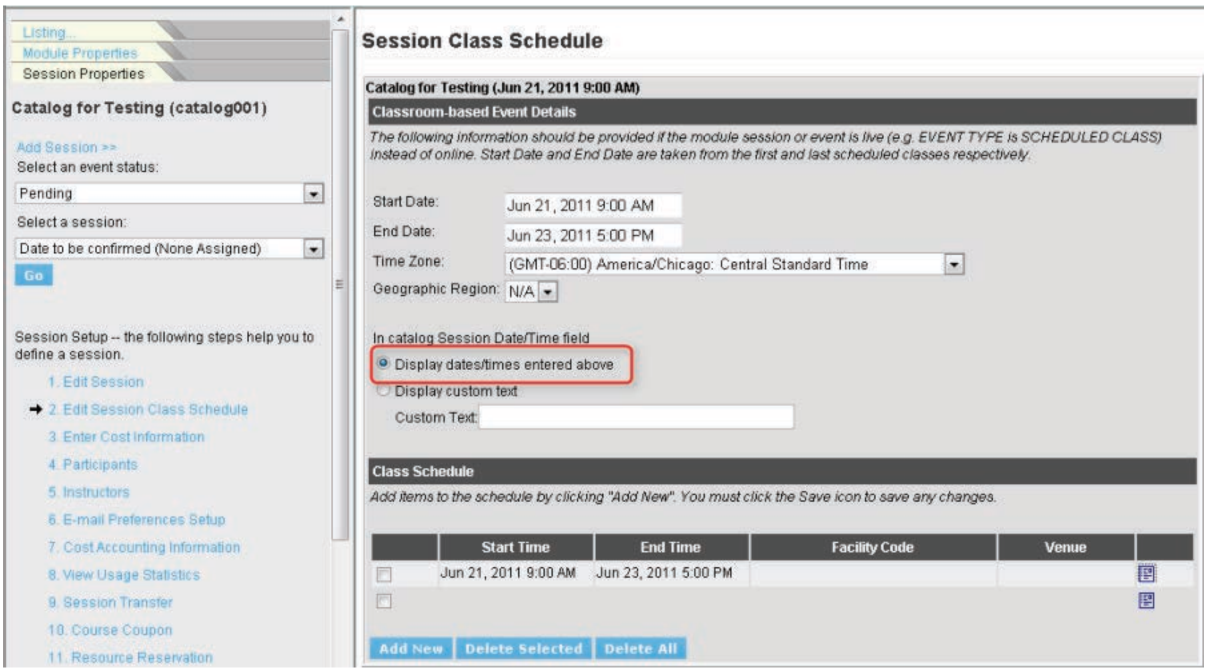
(available for Performance and Learning only)

Adding a Class

To add a class for learning types that support class scheduled, click on **Edit Session Class Schedule** i n the Session Properties. Then click the **Add New** button to launch the class scheduler.



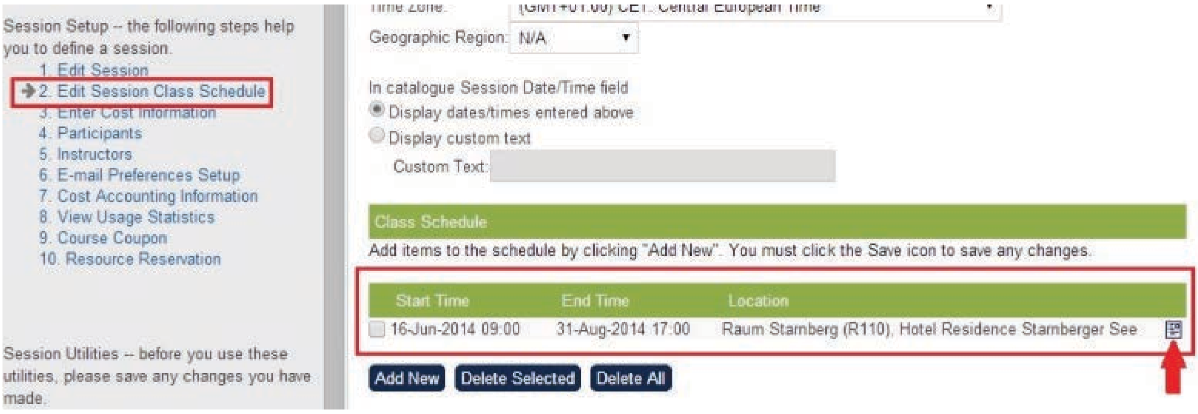
Once the new session class schedule has been defined, you will return to *Session Class Schedule* pag e with new session class added on the class schedule.



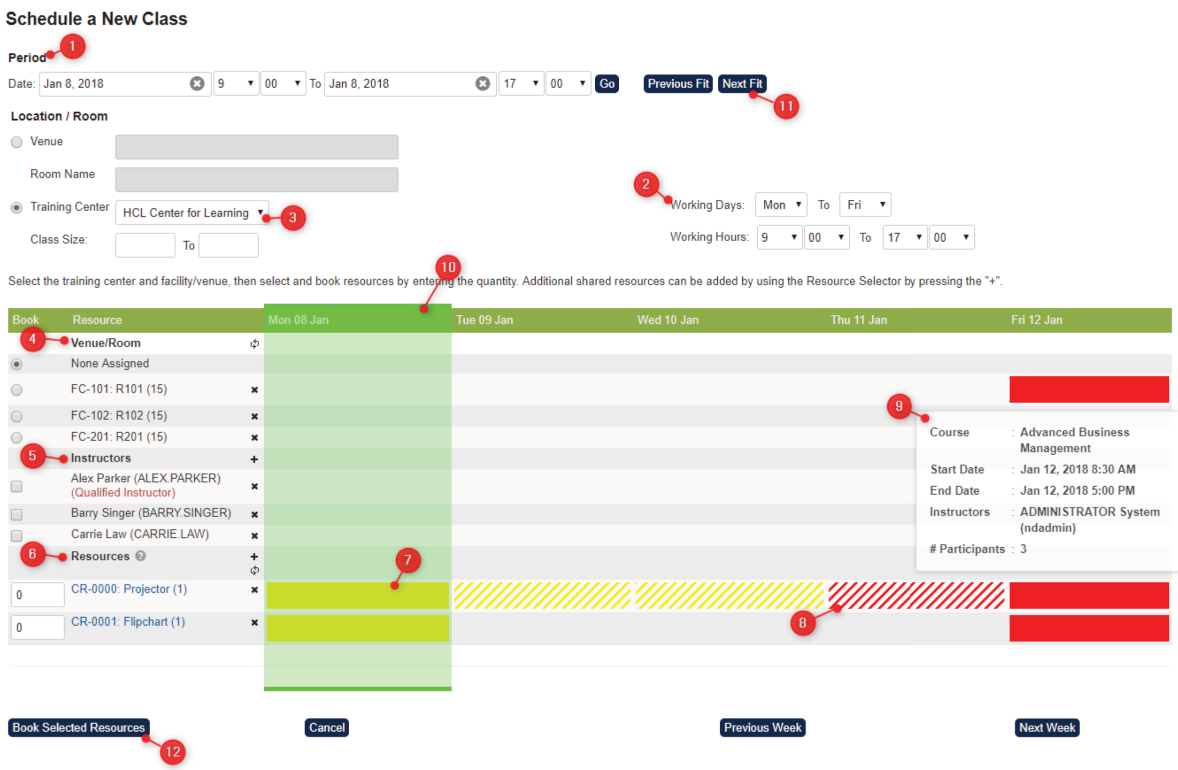
Click the **Save** icon to finish.

Editing a Class

To edit an already existing class, click  next to the desired class.



Using the Class Scheduler



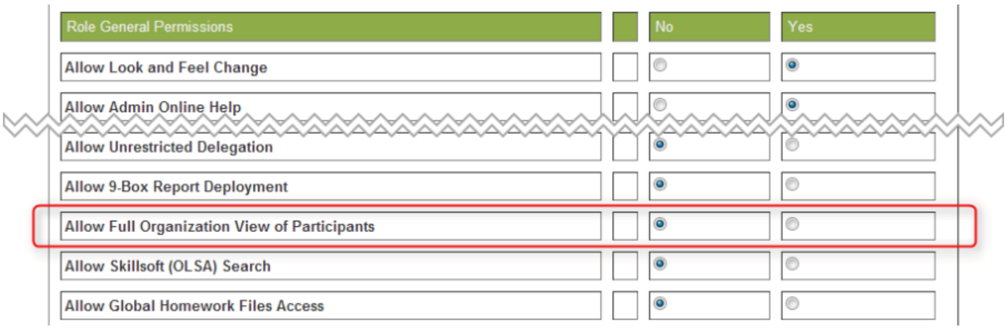
To set up a session class for a course:

1. Input the preferred Date range for the class under **Period**. The timezone of the dates will be the one set at the session level. Click "**Go**" and the calendar view will switch to the week containing the start date. Although a class can span multiple days, it is recommended to split it into a number of day sessions. So each session can start and end on the same day, and that multiple sessions can be held on multiple days.
2. By default, the calendar view goes from Monday to Friday, and the horizontal span of a day's column represents the period from 9:00 am to 5:00 pm. This view can be changed by using the "**Working Days**" and "**Working Hours**" selectors.

3. By checking **Training Center** and selecting the Centers from the pull-down, the associated facilities and resources are listed in the Calendar.
4. Check the desired venue for the current class.
5. Instructors set at the session level are default who will be automatically displayed on the list. Instructor(s) can be added to the Calendar by clicking **+** next to **Instructors**. A selector will then appear for selecting Instructors. Once returning to the Interface, check the desired Instructor(s). Any bookings for the instructors will be indicated by the horizontal bars.
6. The quantity of the resource located at the Training Center (including both booked and unbooked) will be shown. Entering the quantity of the resource to be booked for the current class in the boxes.
7. The calendar events for Facilities, Instructors, and Class Resources will be displayed in the calendar. A horizontal bar indicates that the resources have already been booked during that particular time period: <u>Yellow</u> - The booking belongs to the current course session; <u>Red</u> - The booking belongs to some other course session.
8. Hatched blocks indicate the Class Resource is unavailable due to pre or post-event processing.
9. Mouseover the coloured blocks to see additional information about the event
10. A green vertical highlight means that all selected resources are available for the preferred date range, while a red one indicates there is a conflict with an existing booking.
11. When there are conflicts, the "Previous Fit" and "Next Fit" buttons can be clicked to let the LMS identify the previous / next available time slot (in half-hour increments) during which all required resources are free. This functionality will take into consideration the values set at **Worki ng Days** and **Working Hours** so that the suggested date and time will not fall outside any related persons' working hours.
12. Press **Book Selected Resources** to close the Class Resource Planning Interface Window. Finally, save the class booking inside Catalog Editor.

Participant Management

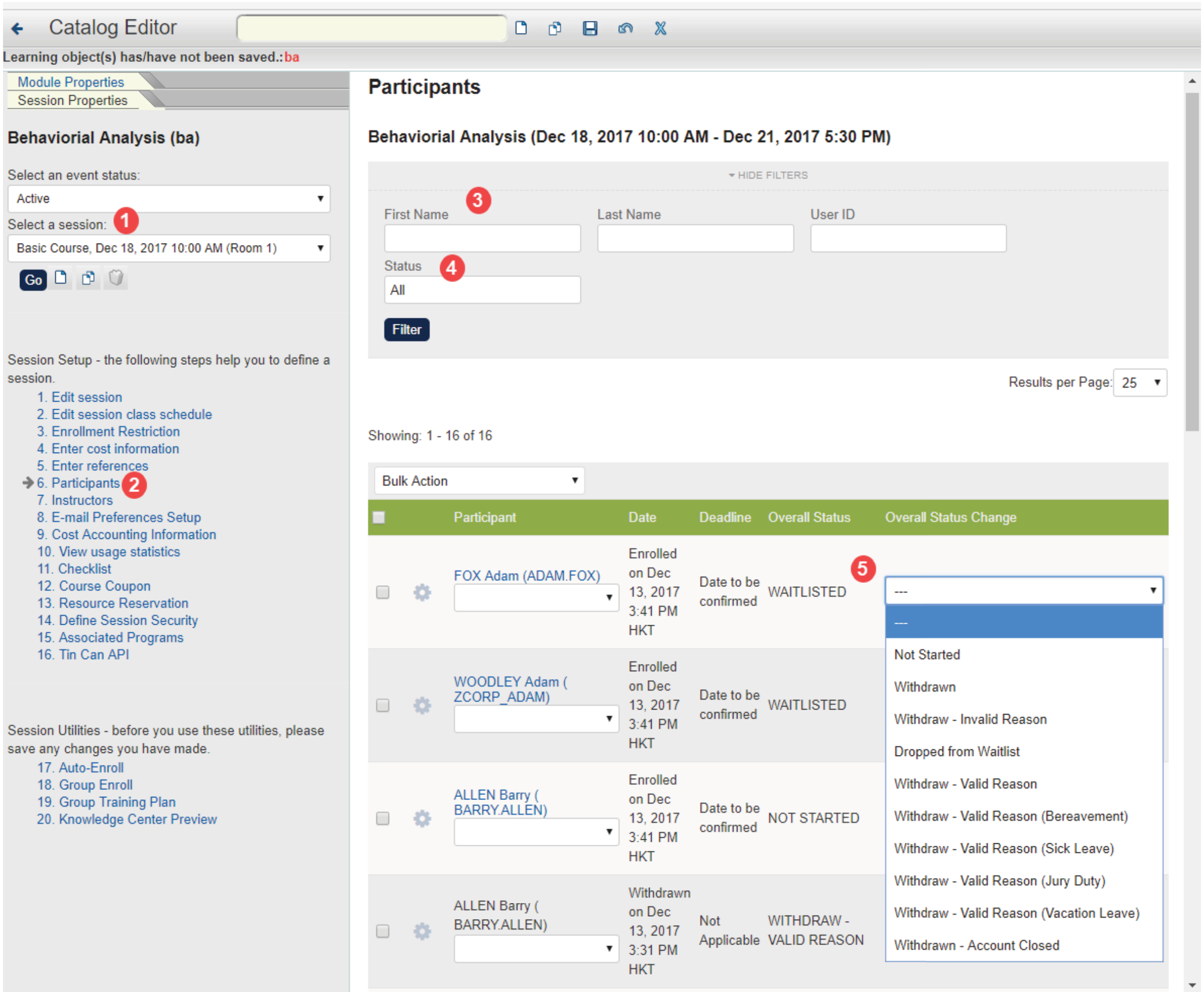
To see a list of learners enrolled on the session, go to Catalog Editor > Session Properties > Participants List. This list is filtered according to user visibility and may not show all learners enrolled on the session. To override any user visibility filtering and see the full list of learners, you will need the "Allow Full Organization View of Participants" role access control enabled:



Changing the Overall Status of the Participant

In Catalog Editor > Participants, you can change Participant Overall Statuses for the session. You will need write permission to the module or session and unrestricted access to Catalog Editor - Session Management. To set overall status for participants:

1. Select the session on which the learners are enrolled
2. Click **Participants**
3. If there are many participants, filter by learner **First Name**, **Last Name** or **User ID**
4. You can also filter by current **Status**
5. Set the Overall Status Change statuses as necessary
6. Click **Save** to apply



The table below shows the allowed status transitions:

Pre-statuses		Current Status		Post-Statuses
Completed's Pre-statues		**Waiver/Exempt**		**Completed**'s Post-statues
Withdraw's Pre-statuses, **Withdraw** and **Withdraw - Invalid Reason**	➡	**Withdraw - Valid Reason**	➡	**Withdraw - Invalid Reason**
Withdraw's Pre-statuses, **Withdraw** and **Withdraw - Valid Reason**		**Withdraw - Invalid Reason**		**Withdraw - Valid Reason**
In Process		**Excused**		-
Waitlisted		**Dropped from Waitlist**		-

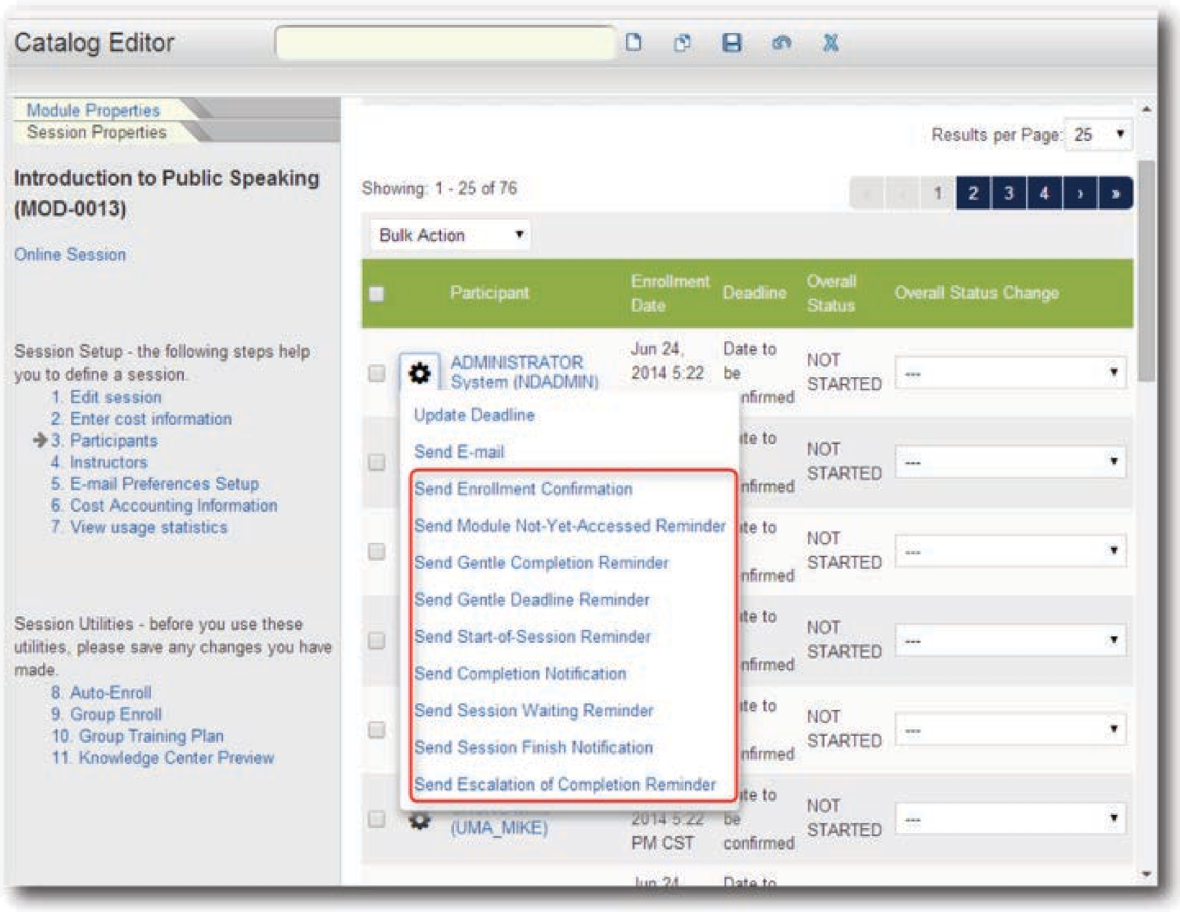
The list of Transcript Statuses that you see under **Filter** and **Overall Status Change** will also depend on Permissions.

When making transcript status changes at **Participants List**, the learner's eligibility for competencies and certifications may be affected resulting in new awards or revocation. As a result, there are some limitations to what transcripts can be changed:

- Only the latest transcript of a user can be changed from a completed to an incomplete status.
- If the transcript contributes to one or more programs for the learner, all program transcripts must be set to incomplete before the sub-module transcript can be changed from completed to incomplete.

Sending E-mails

You can send e-mails to selected participants at Catalog Editor Participants List:

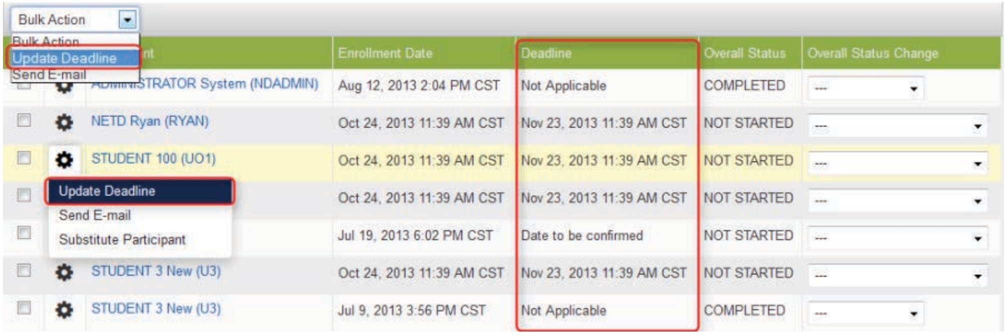


In addition to composing an e-mail from scratch, you can, depending on configurations, send one of the following automated e-mails on demand:

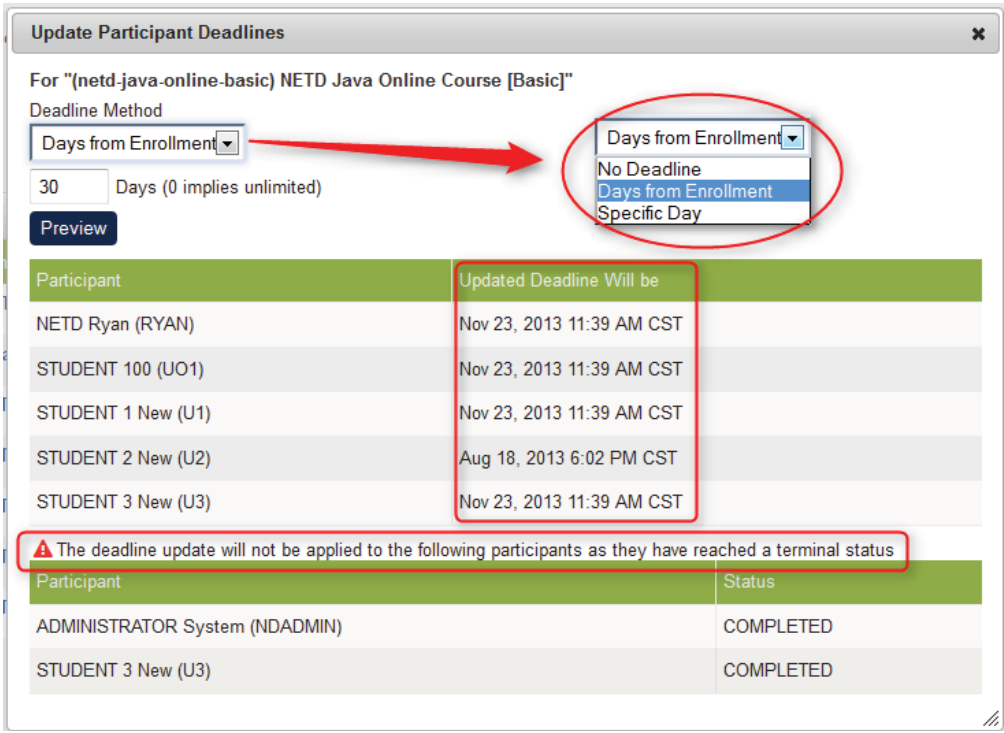
1. Enrollment Confirmation
2. Module Not-Yet-Accessed Reminder
3. Gentle Completion Reminder
4. Gentle Deadline Reminder
5. Start-of-Session Reminder
6. Completion Notification
7. Session Waiting Reminder
8. Session Finish Notification
9. Escalation of Completion Reminder

Participant Deadlines

You can manage deadlines participants in Catalog Editor > Session Properties > Participants List:



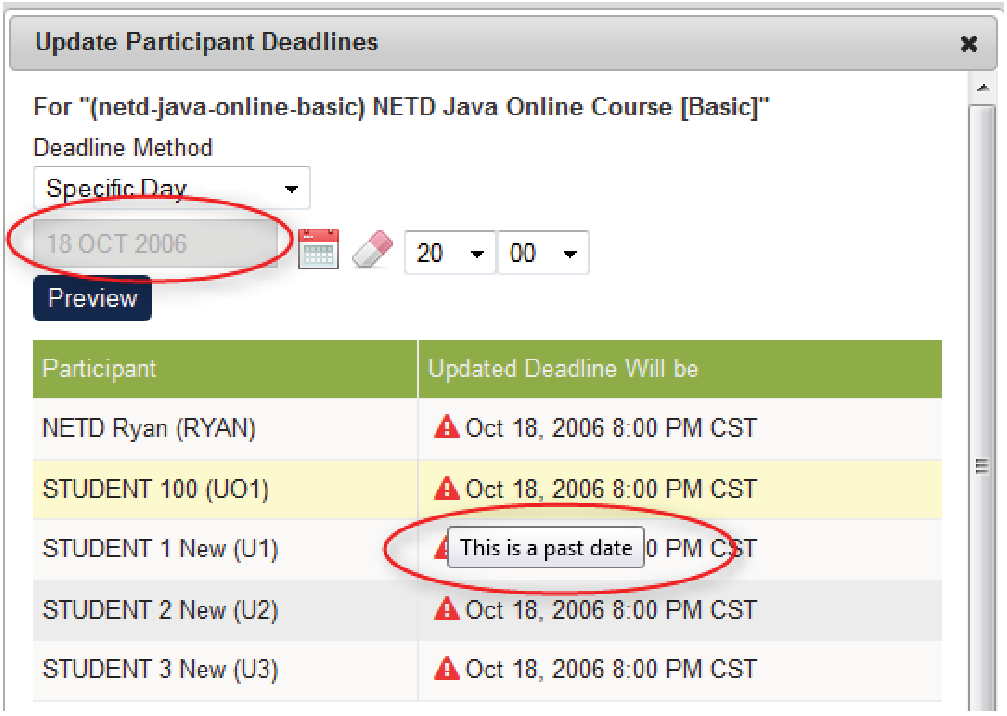
Deadline" column in the Participant list indicates the deadlines of the course for the participants. Administrators can update deadline through "Bulk Action" for a batch of participants or from the pop-up menu in gear icon for a single participant



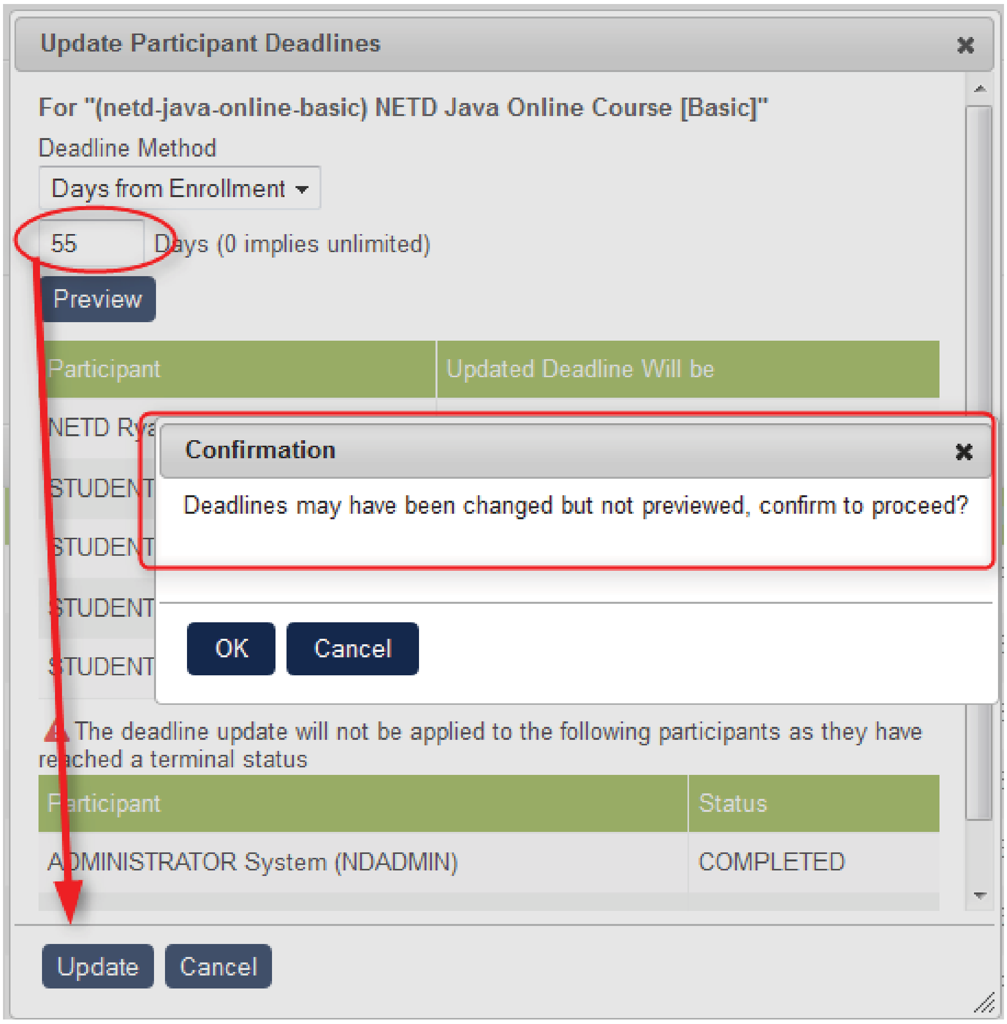
Upon clicking "*Update Deadline"*, preview dialog pops up

In the pop up preview dialog, only records with transcript status "Waitlisted", "Not Started", "In Process" and "Pending Approval" can be updated for participant deadline; these records are displayed in the first table, other records that cannot be updated will be displayed in the second table with a warning title.

By default, the preview results in the "Update Deadline Will be" columns are calculated according to the deadline setting in "Session Properties", the results will be re-calculated after clicking the "Preview" button. - Catalog administrators can choose from "No Deadline", "Days from Enrollment" and "Specific Day" and preview the participant's deadline.



If the Administrators set a day that will yield a calculated result earlier than now, a warning icon will be shown in the "Updated Deadline Will be" cell; a mouseover of the icon will result in a message pop up that reads "This is a past date".

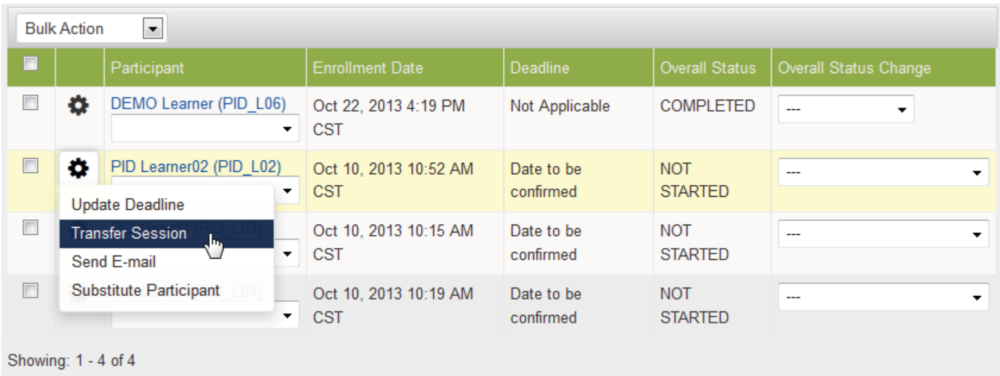


If the Administrators click "Update" without previewing the deadline results, a warning message will pop up asking for confirmation.

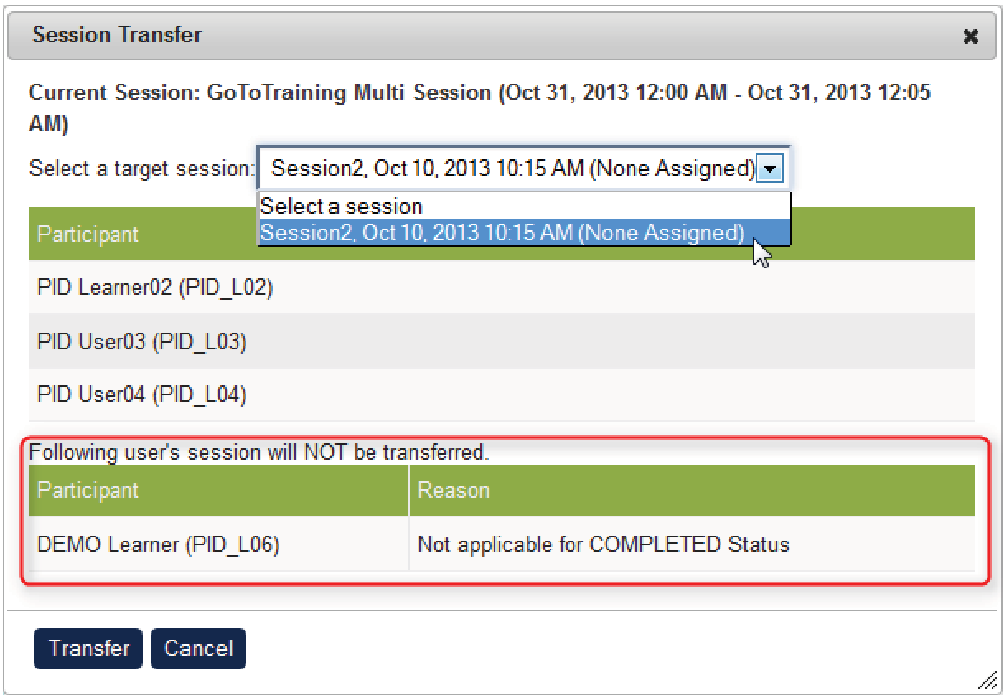
Session Transfer

(available for Performance and Learning only)

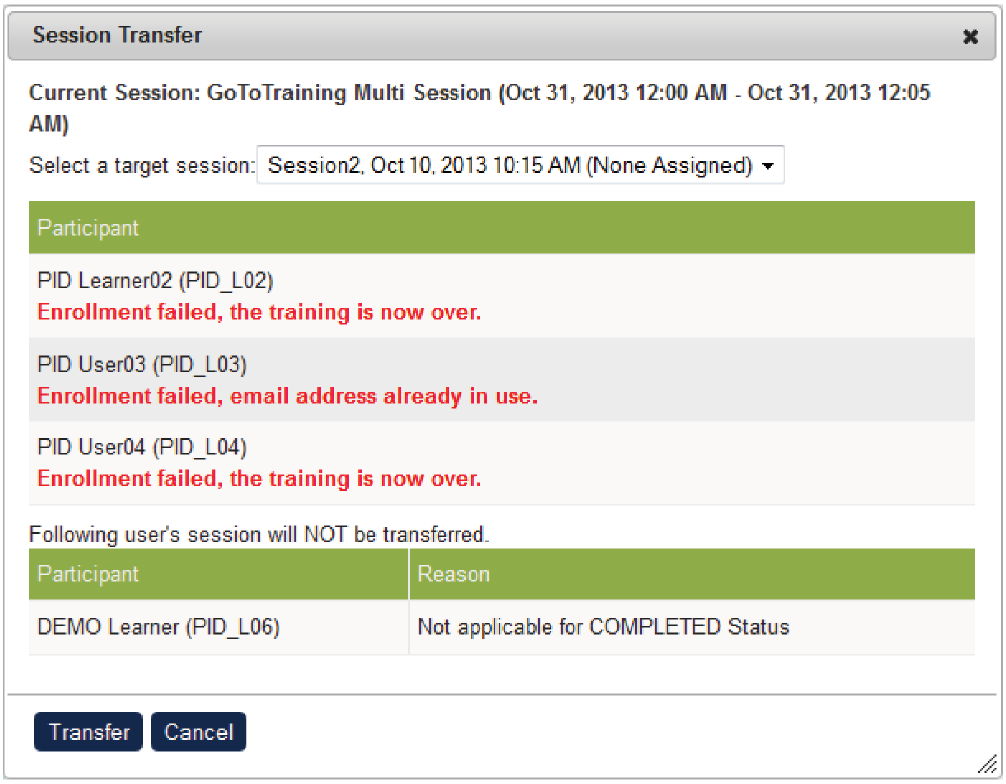
This feature allows the user to transfer a participant to another session. Only users who have not yet completed the session are eligible to transfer to another session. The session transfer feature has been integrated into the Participants List in Catalog Editor. Catalog administrators can transfer learners from one session to another from the Participants List. Session Transfer is available under the gear icon of each participant transcript



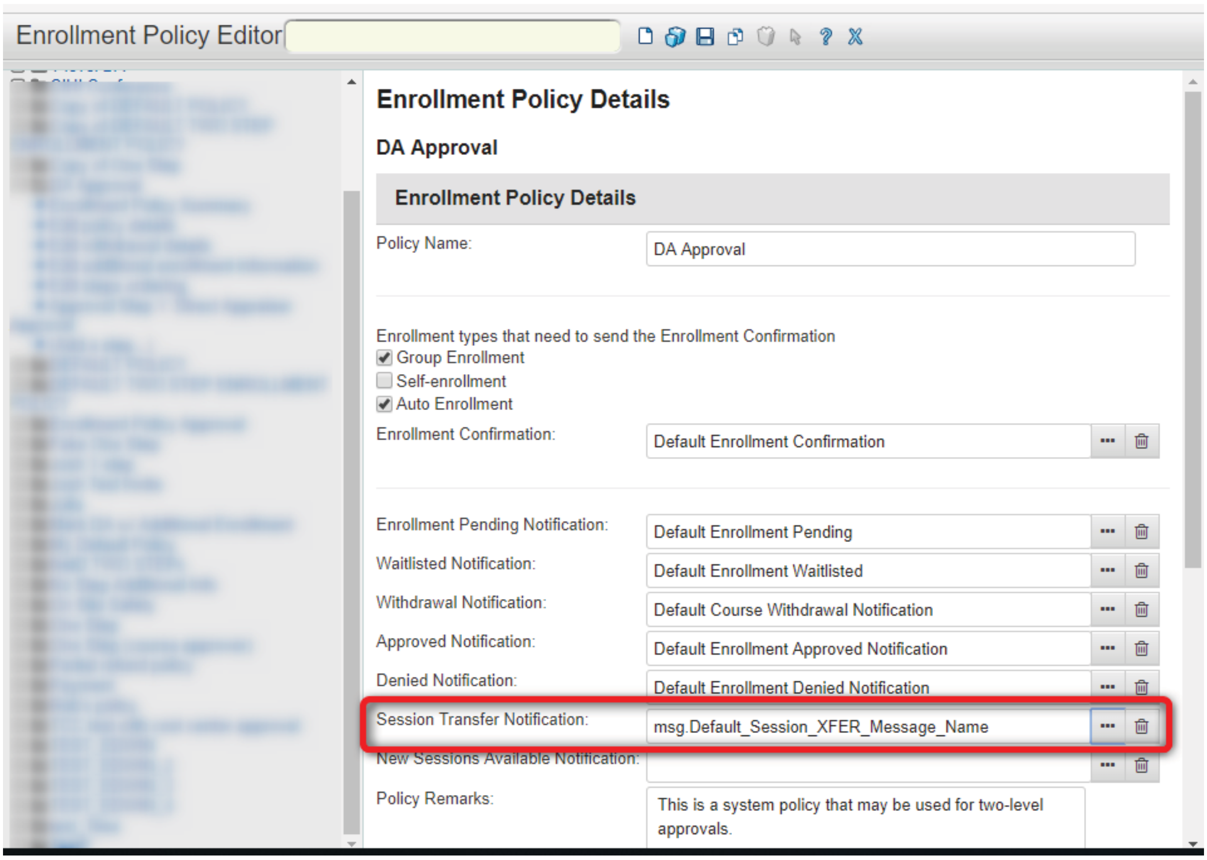
Session Transfer dialog for Catalog administrator to select target session to transfer participants (participants who could not be transferred would have further reason shown)



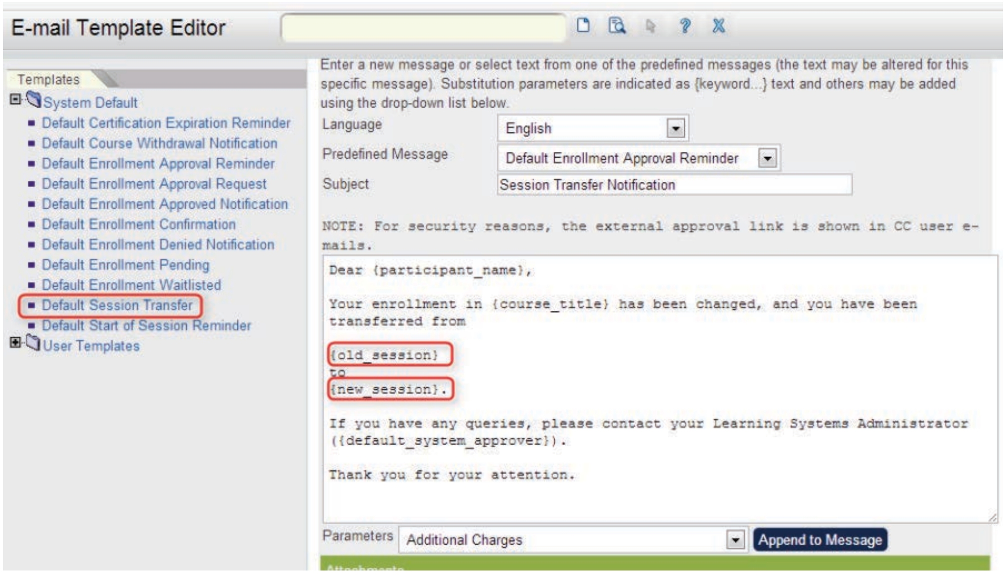
Session Transfer failed with reason shown next to the failed participants



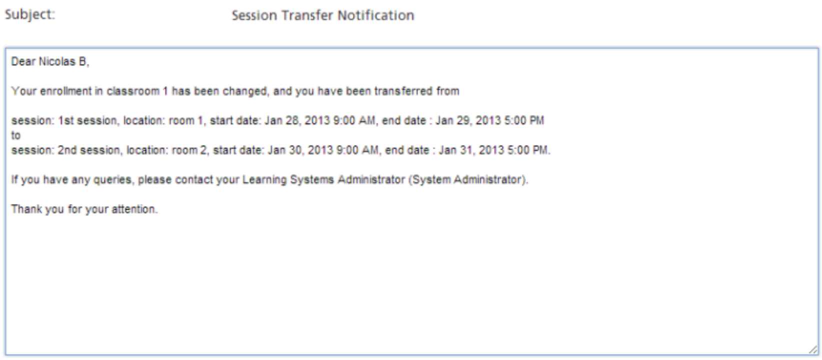
When a learner is transferred from one session to another, s/he will receive a session transfer notification. This notification can be configured in the 'Enrollment Policy Editor'.



A default 'Session Transfer Notification' template is provided and can be configured in the 'E-mail Template Editor'



You can specify the **old_session** which contains session information of the old session and the **new_session** which contains session information of the new session. A sample notification will look as follows:

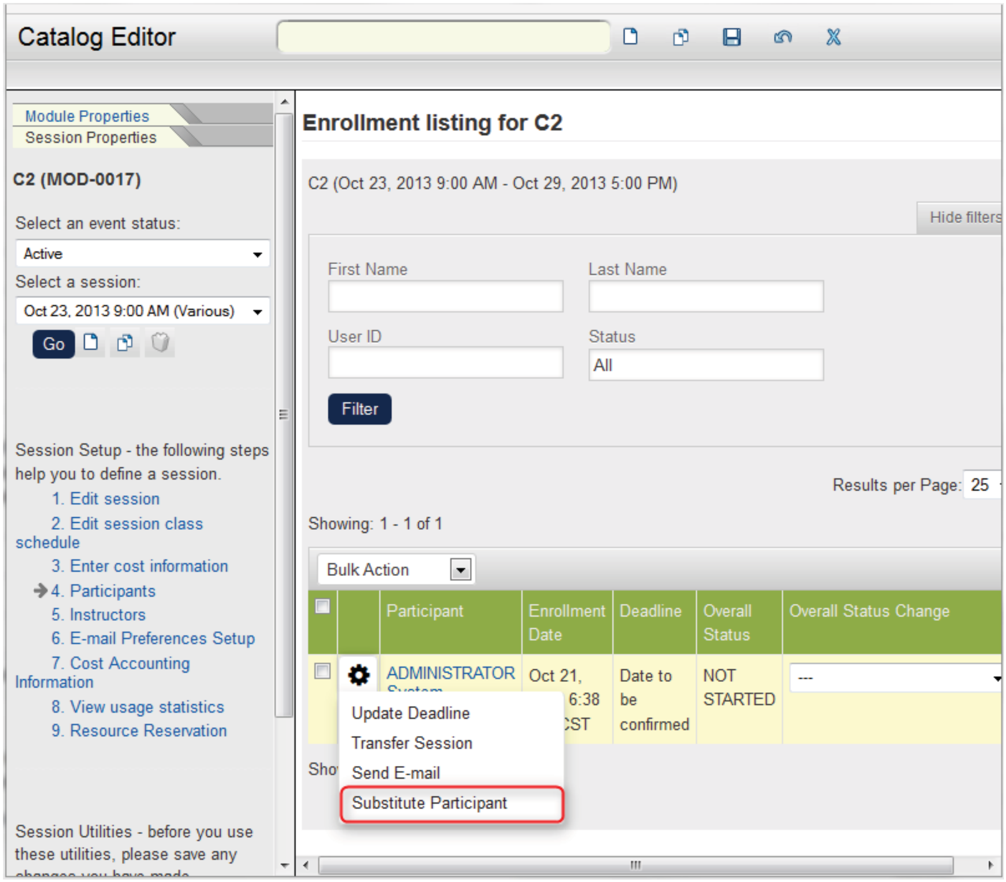


Enrollment Substitution at Catalog Editor Participants List

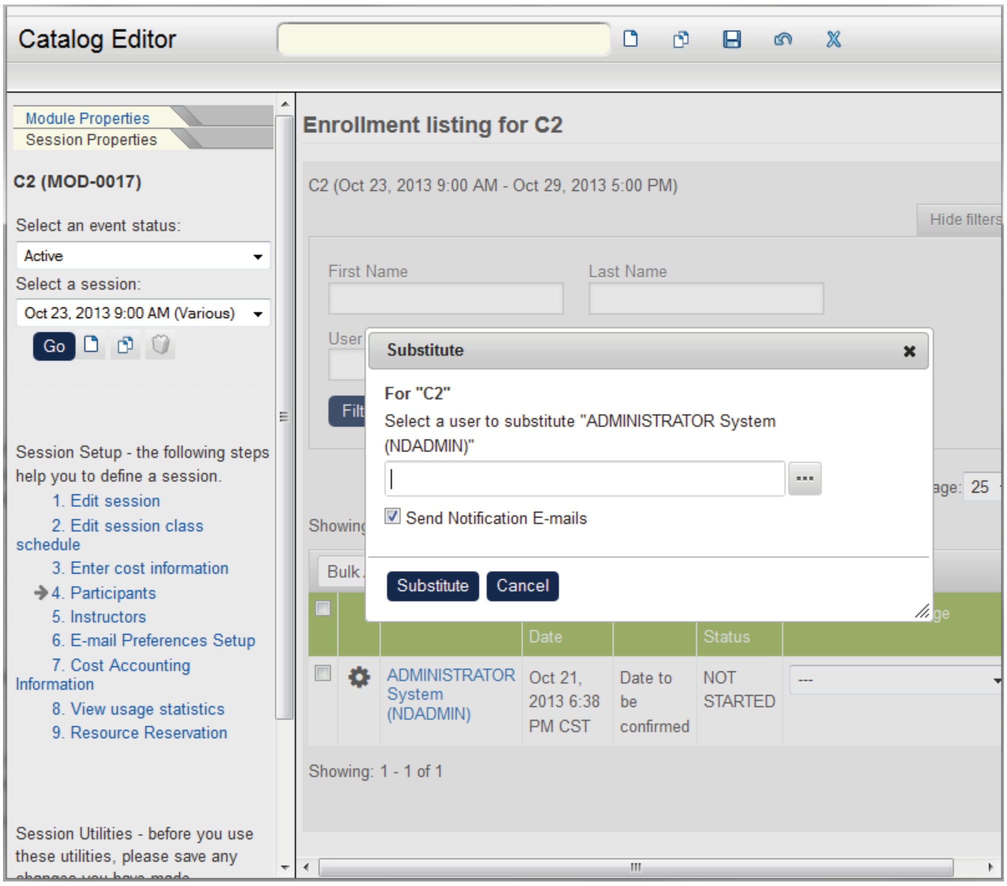
(available for Performance and Learning only)

Enrollment substitution can be triggered from the gear icon next to the participant name. The following conditions must be satisfied in order to perform substitution:

- Enrollment Substitution in system configuration is enabled
- The Learning Object is not a Program
- The overall status of the selected participant is Not Started or In Process
- The session hasn't started yet



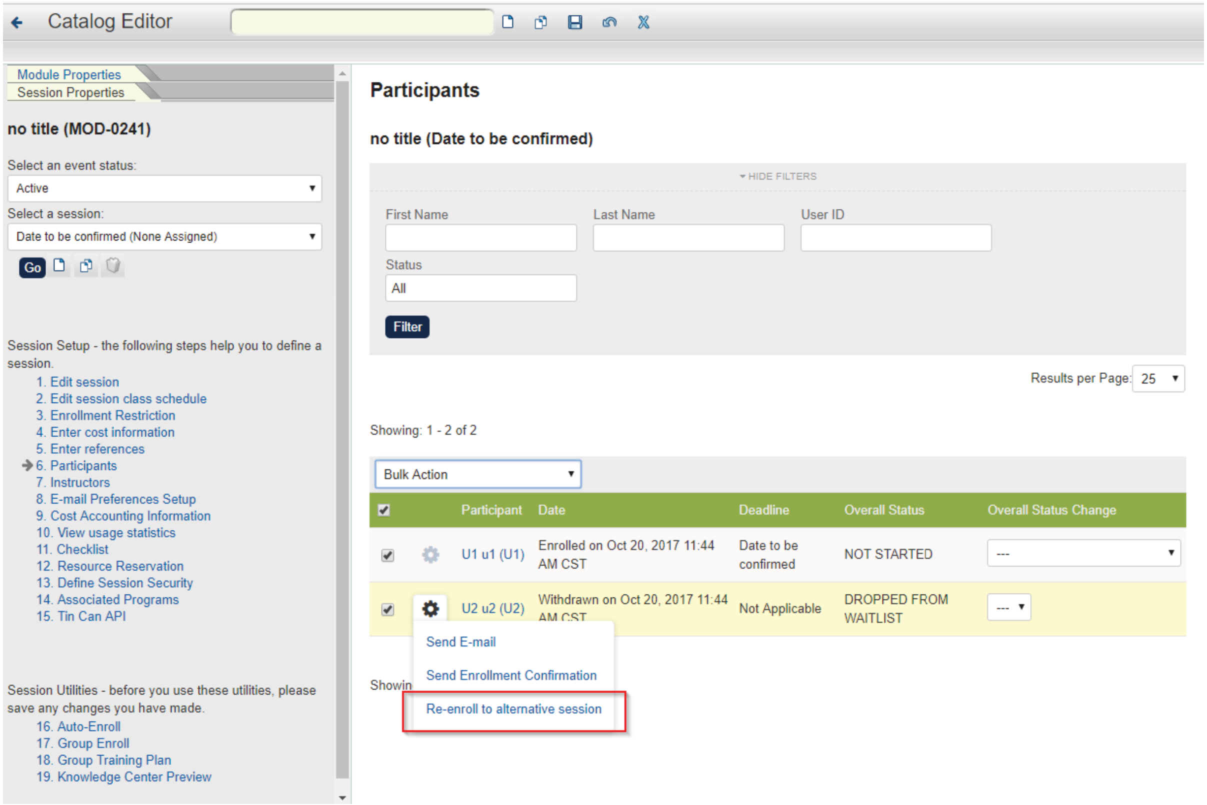
The Substitute Participant button in the Participant list



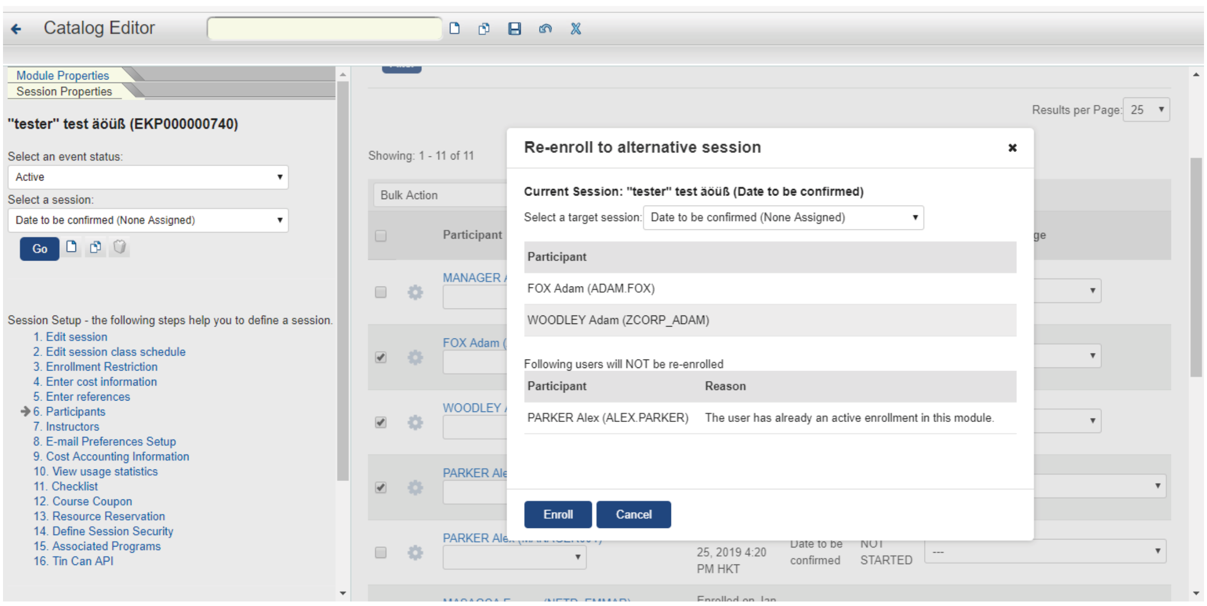
After clicking on Substitute Participant, a dialog is shown that permits selecting a target participant

Re-enrolling to Alternative Sessions

Learners can reach a terminal enrollment status that does not merit credit e.g. Dropped from Waitlist, Failed, No Show. Where the course is mandatory, administrators often need to re-enroll such learners onto an alternative session. This can be done individually or in bulk at Catalog Editor > Session Properties > Participants:



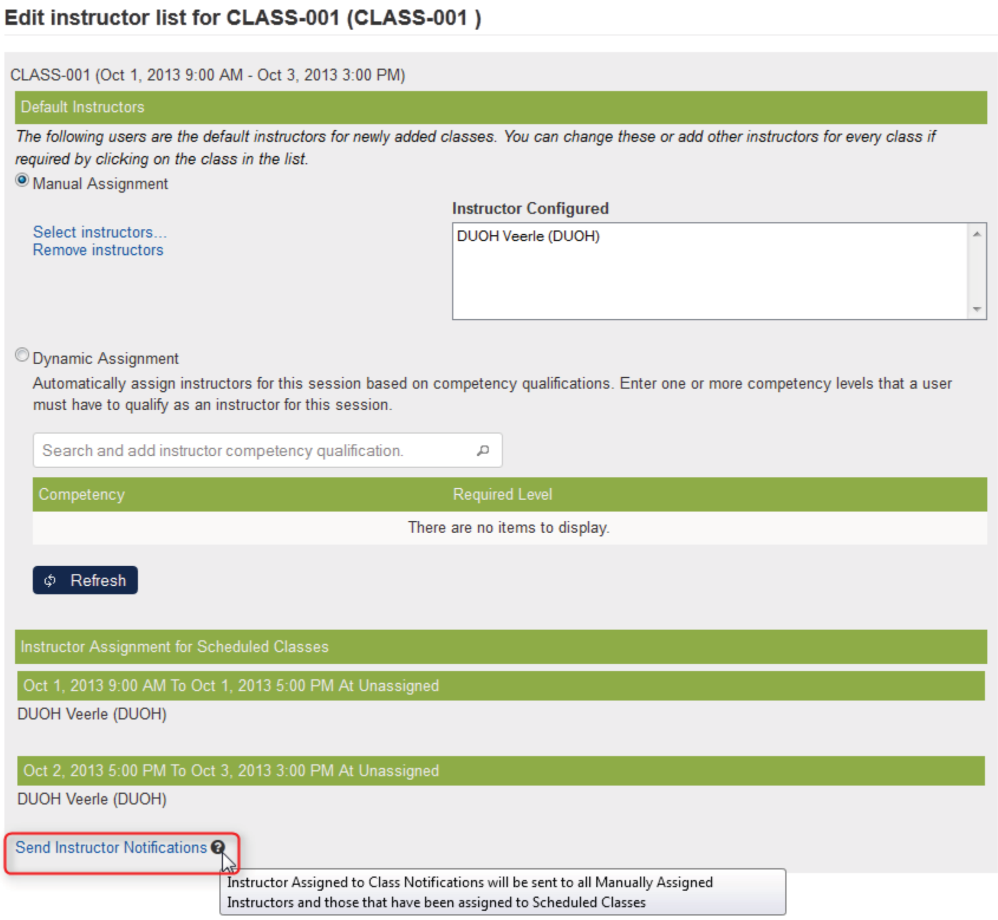
This action is only available for learners who do not already have an active transcript for the same module in their records. When multiple learners are selected, an overlay box will show both the Learners available to be re-enrolled and those unavailable:



After selecting the target session and clicking **Enroll**, the administrator will be brought to the **Group Enrollment** screen for the target session, with all picked participants pre-filled in the **Select participant(s)** box. Continue as you would when executing a group enrollment.

Assigning Instructors

To designate an instructor, select the classroom session to which you wish to assign this instructor. Click on **Instructors** in the Catalog Editor. The *Edit Instructor List* screen appears.



1. Specify the instructors to be assigned to this session by clicking the **Select Instructor(s)** hyperlink.
2. Specify your choice in the **Selector** screen that appears.
3. To remove selected instructors, select the individual instructor and then click the **Remove instructor(s)** hyperlink.
4. Click the **Save** icon.

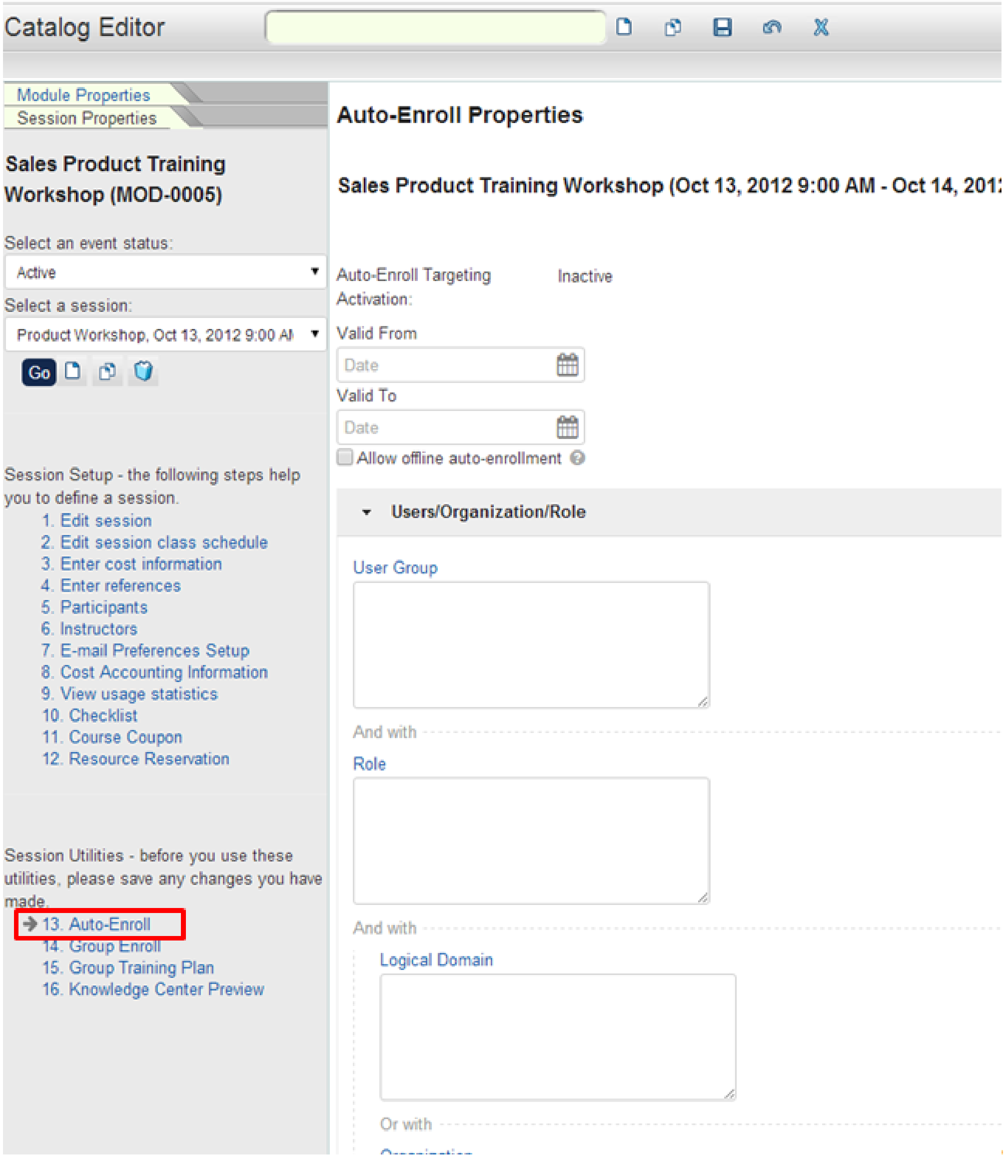
You can send an e-mail to assigned instructors using the "Send Instructor Notification" function.

Auto Enrollment

You can enable auto-enrollment for a course at Catalog Editor > Session Properties > Auto-Enroll. You can specify selection criteria to identify learners who should be automatically enrolled onto the session in the form of:

1. User Groups
2. Roles
3. Logical Domains or Organizations
4. User Attributes / Extensions
5. Job Profiles
6. Join Date

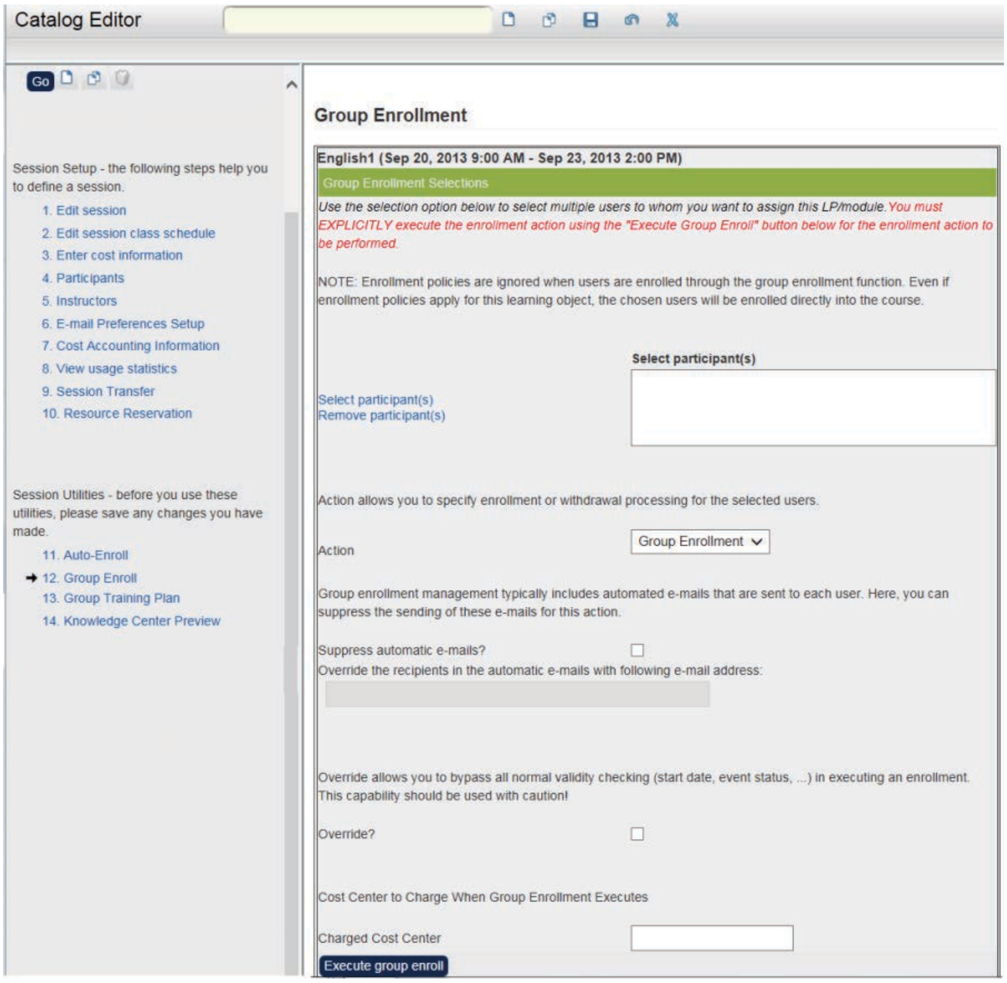
7. Job Title
8. Language
9. Location
10. Direct Appraiser
11. HR Manager
12. Manager
13. Cost Center
14. Employee Number
15. Competency



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

Group Enrollment

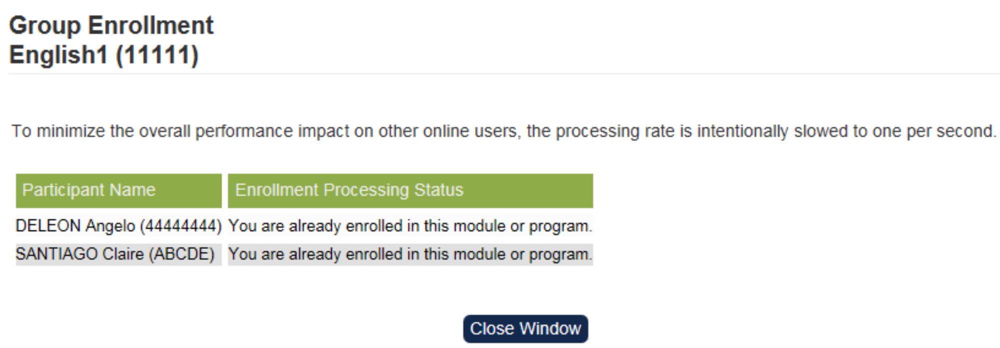
To specify the Group Enrollment properties, click on **Group Enroll** in the Catalog Editor.



From here you may:

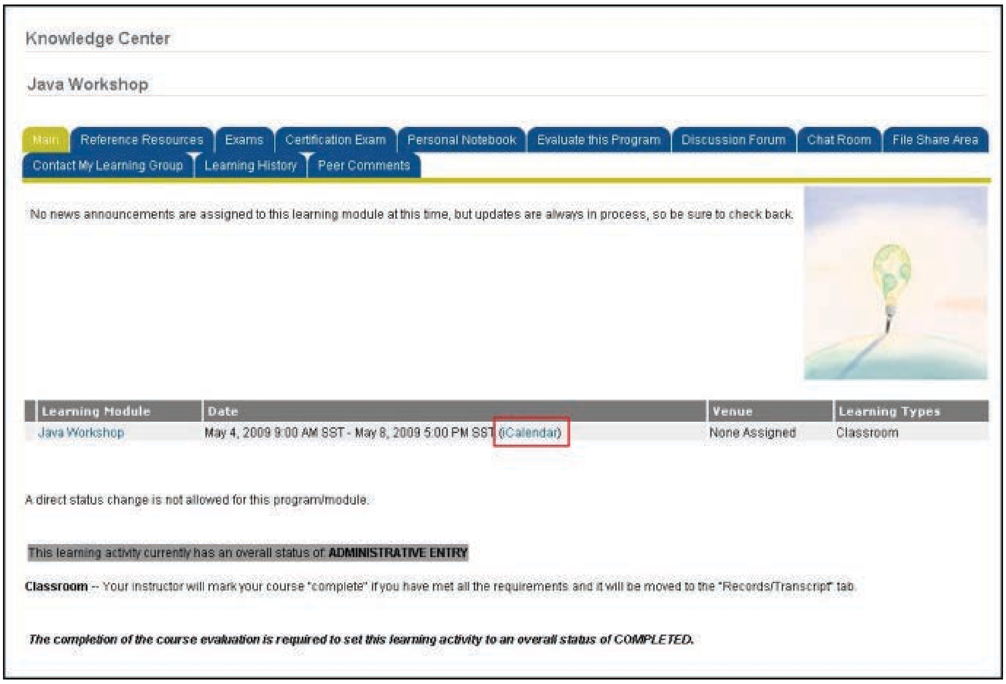
1. Select users you want to include in the group enrollment
2. Select **Group Enrollment** option in the Action in the drop down button (or Group Withdrawal)
3. Suppress automatic enrollment email to users
4. Override all normal validity checking
5. Change Cost Center

Executing the group enroll will kick off the process and the results will be displayed in a separate window:



It is assumed that the administrator is aware of enrollment restrictions and enrollment policy checks are bypassed during group enrollment.

iCalendar links are listed in the Knowledge Center. These behave in the same way as the links which appear in the Catalog Description page for a course, allowing iCalendar files to be downloaded.

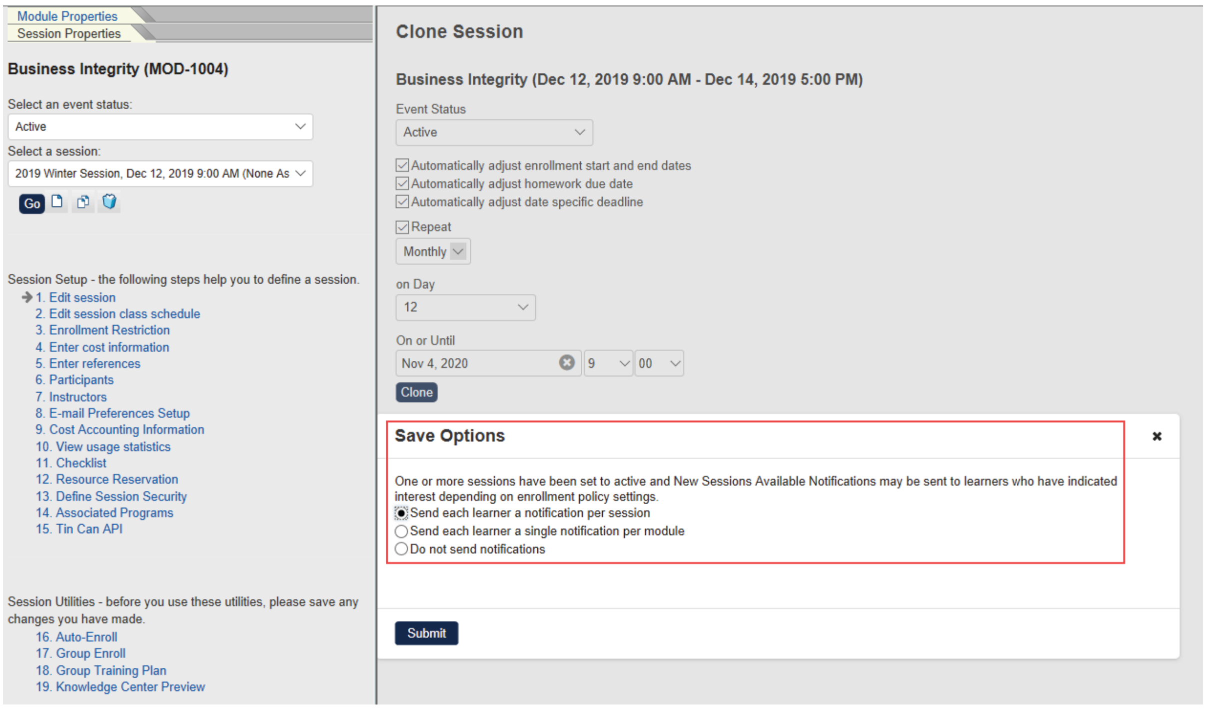


Email Notifications

New Sessions Available Notification

On making new sessions available, you can opt to send a New Sessions Available Notification to learners who have indicated interest in the course. A "Save Options" dialog with “New Sessions Available Notifications” will be displayed when you:

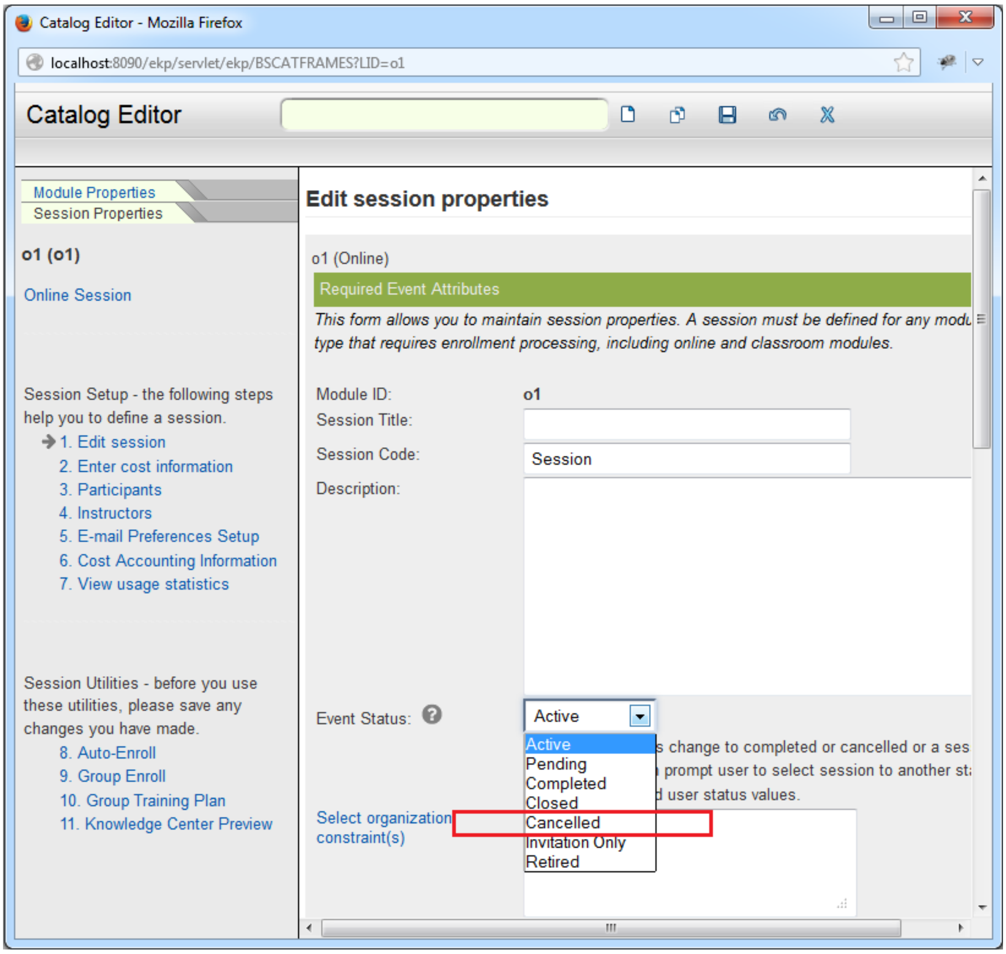
1. Create a new session, clone an existing session, or change an inactive session to active
2. and the start date of that session is in the future
3. and there are learners who have indicated interest in the course



The e-mail template to be used is determined by the "New Sessions Available Notification" in the Enrollment Policy Editor.

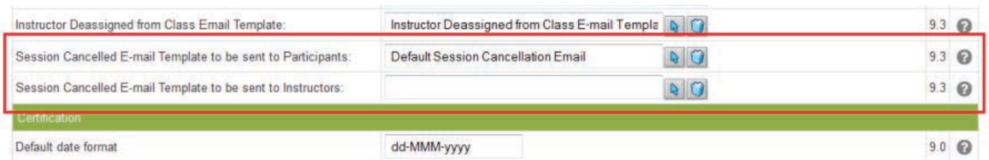
Session Cancellation Email

Active students of a learning object will be notified by email with subject "Notification of Course Cancellation" when a session is cancelled. Participants and instructors of a course session can both be notified with the right system configuration setting. An email template allows the content of the notification to be customized.

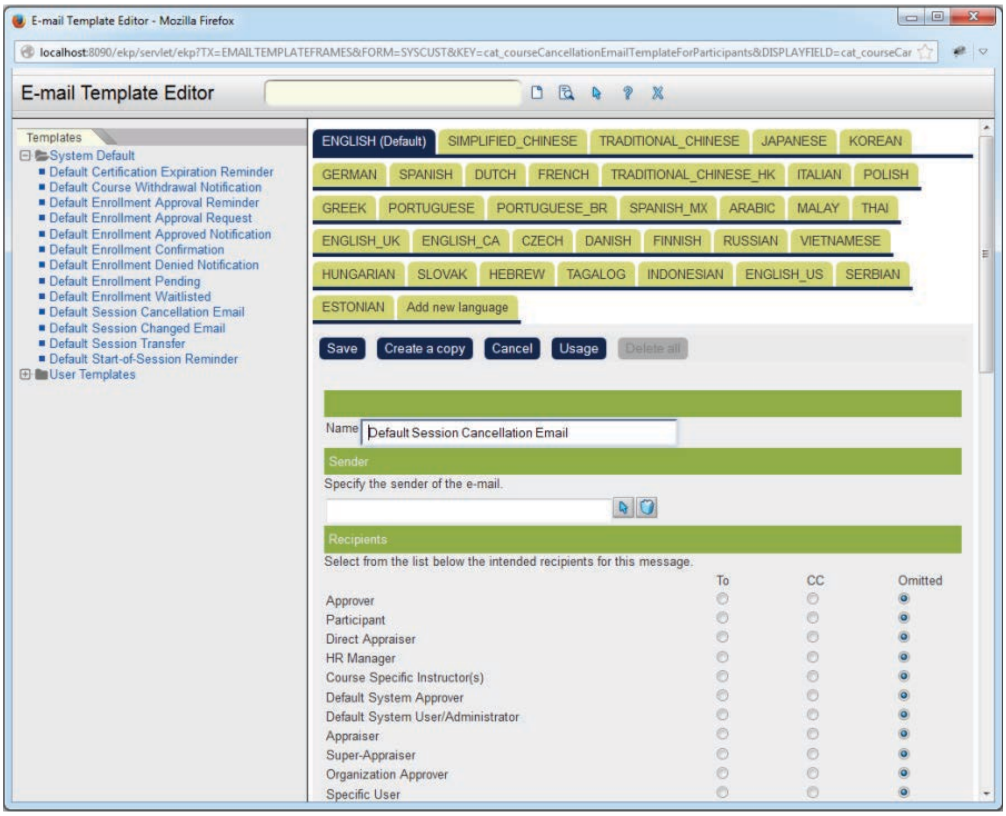


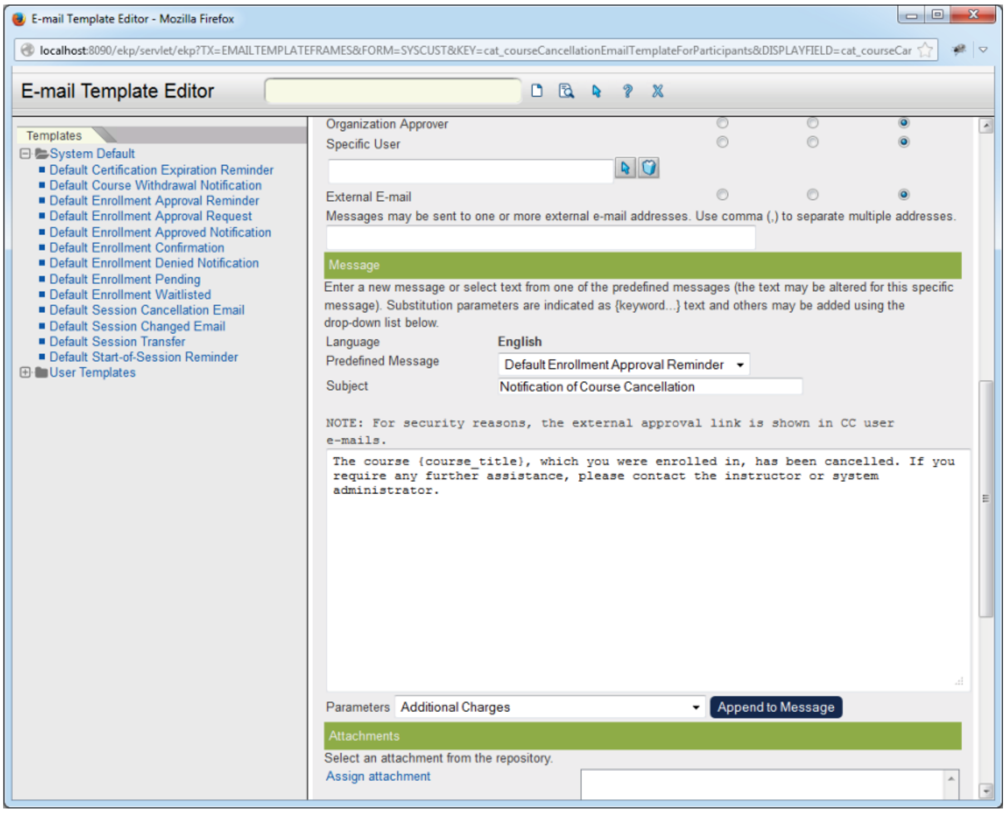
Two related configuration settings are located the System Configuration page under the Catalog section

- Session Cancelled E-mail Template to be sent to Participants
- Session Cancelled E-mail Template to be sent to Instructors



The "Session Cancelled E-mail Template to be sent to Participants" configuration will default to a value of "Default Session Cancellation Email" on migration. The "Session Cancelled E-mail Template to be sent to Instructors", being a new feature, will not have any default value. The email subject of the Default Session Cancellation Email is "Notification of Course Cancellation". The email body has exactly the same text as the previous notification upon migration, with different languages available. Users can modify the subject and the body of the email to any other content.





Given appropriate configuration of the "Session Cancelled E-mail Template to be sent to Instructors", instructors of course sessions will be notified when they are cancelled. Participants and Instructors are hard coded as recipients in the "Session Cancelled E-mail Template to be sent to Participants" and "Session Cancelled E-mail Template to be sent to Instructors" templates. Individual emails will be sent in both cases.

Retired Session Notification Email

"Session Retired E-mail Template to be sent to Participants" system configuration controls sending of notifications to learners when a session status is changed to retired. Only learners who are currently enrolled in the course will be sent the notification.

Session Changed Notification

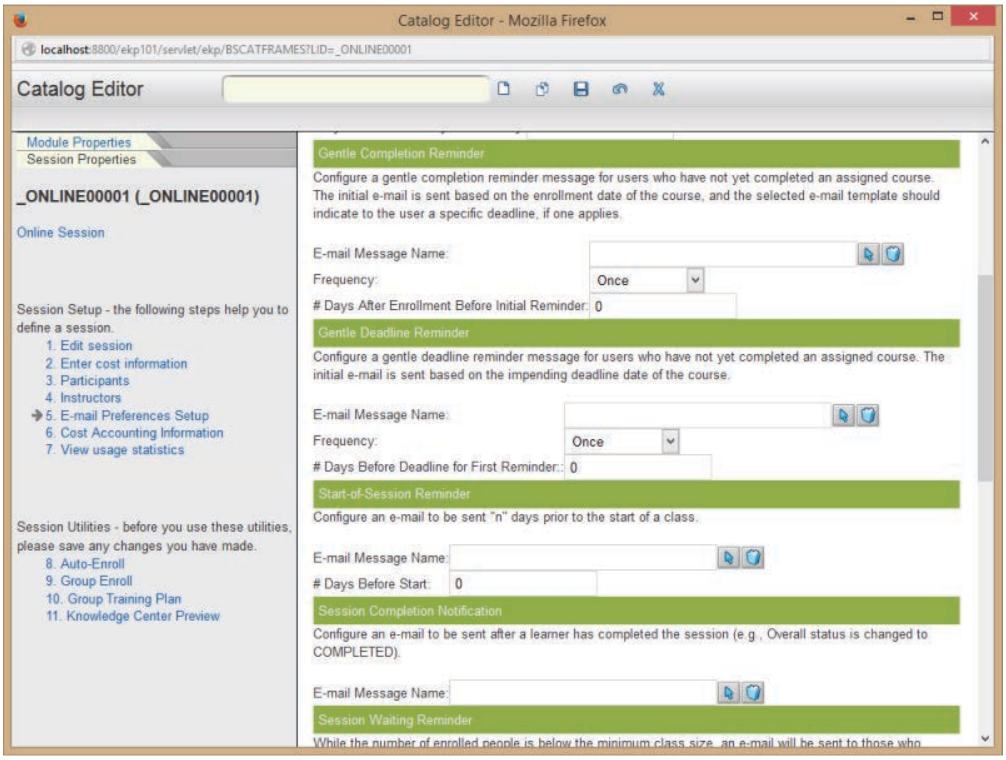
In the System Configuration page, there are two features that pertain to notifications when there are session changes:

- Session Changed E-mail Template to be sent to Participants' E-mail Template Configuration
- Session Changed E-mail Template to be sent to Instructors' E-mail Template Configuration

A default email template, **Default Session Changed Email**, is automatically assigned to the "*Session Changed E-mail Template to be sent to Participants"* E-mail Template Configuration. You may customize the template as necessary.

Gentle Deadline Reminder

The Gentle Deadline Reminder is similar to the Gentle Completion Reminder but is triggered by the deadline date. Enrollments that do not have a deadline date are not processed during this event handling.



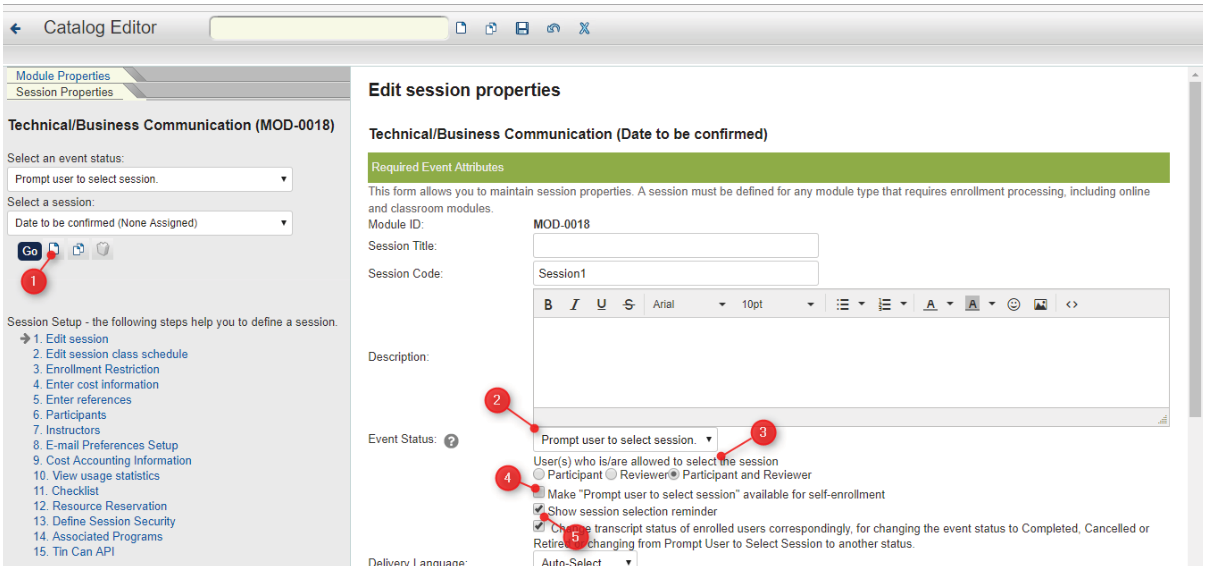
Session Waiting Reminder

When the number of enrolled people is below the Minimum Enrollment Limit set in the Session Properties, the Session Waiting Reminder will be sent to those who register explaining that more enrollments are required before the course is confirmed. Once the minimum class size is reached, the enrolled users will be sent a confirmation e-mail. If the minimum class size is not reached by the enrollment deadline, the class will be cancelled, and the enrolled users will receive a cancellation notification.

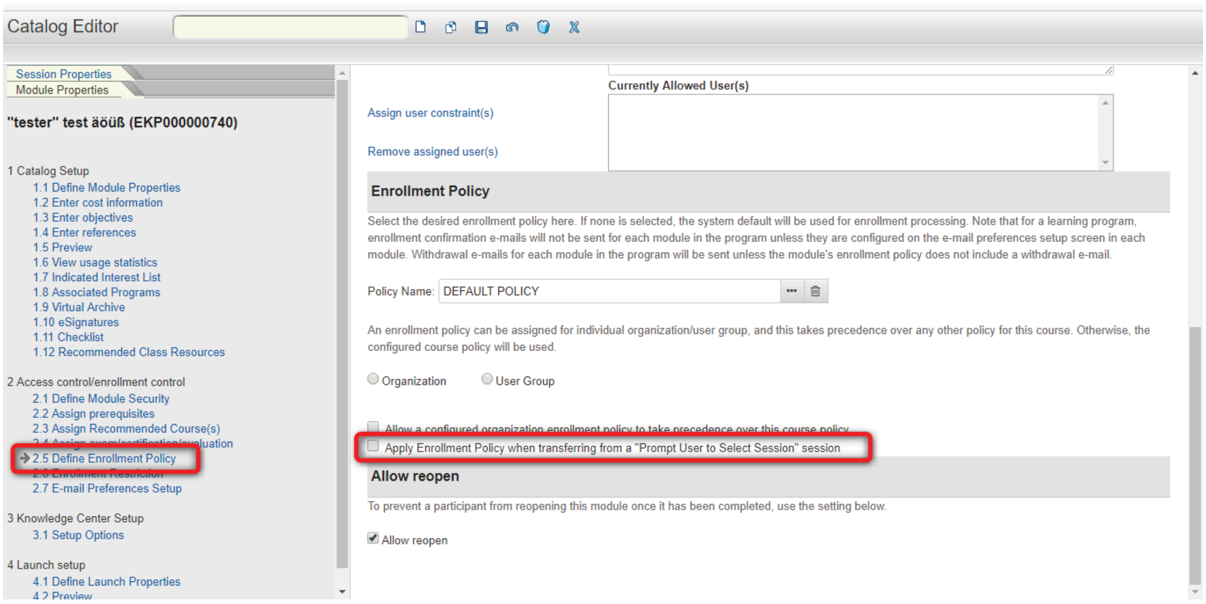
Prompt User to Select Session

The "Prompt User to Select Session" status is used to enroll learners onto a course and deferring the session selection until later. To set up:

1. Create a session
2. Set the Event Status to "Prompt user to select session"
3. Specify who should select the session - Participant, Reviewer, or Either
4. Enable "Make "Prompt user to select session" available for self-enrollment" if the session is enrollable for learners/reviewers via the Catalog
5. Enable "Show session selection reminder" if learners should be reminded to select a session via Login Notification



Approval can be applied when learners select an active session from a "Prompt user to select session" session by enabling "Apply Enrollment Policy when transferring from a 'Prompt User to Select Session' session" in **Module Properties > Define Enrollment Policy.** This option is only available for Classroom, Virtual Classroom and Workshop/Seminar learning types.



For "Prompt user to Select Session" sessions that are a part of a program, the learner will be re-enrolled onto the session if the following criteria has been met:

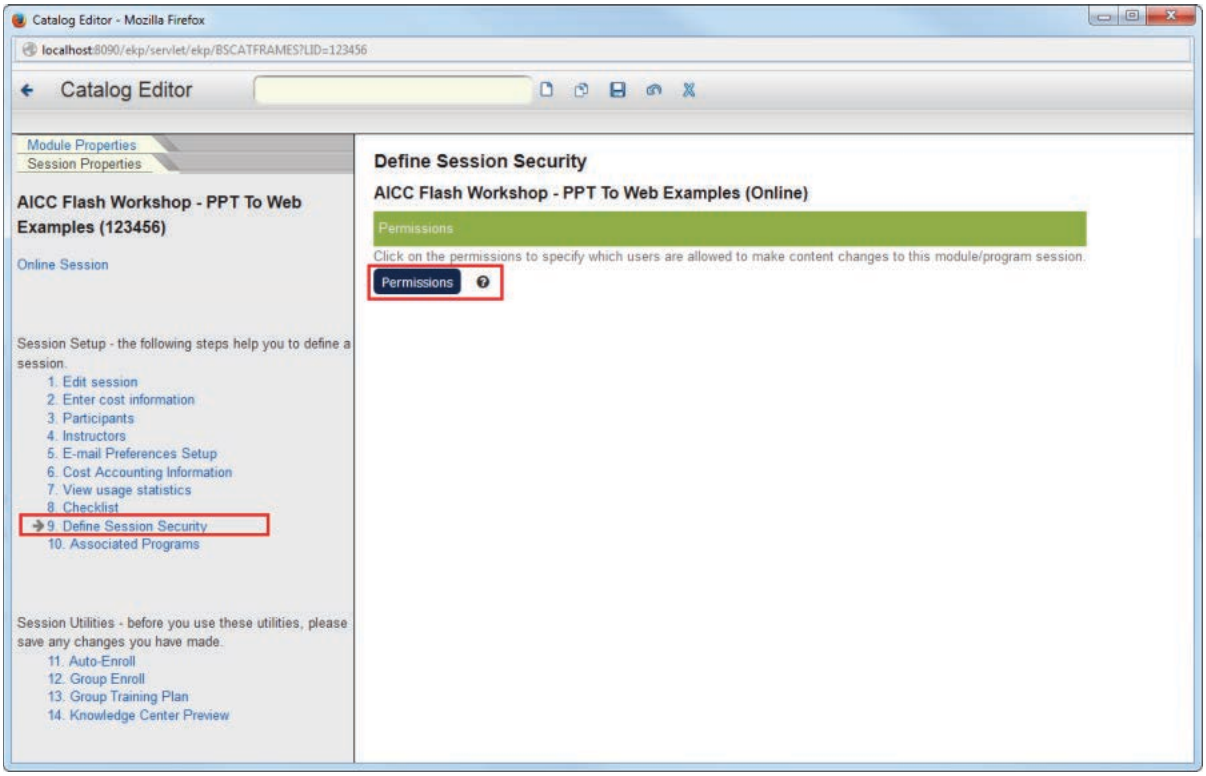
1. The approval request expires or is denied

2. The approval request resulted from a session transfer
3. The program sub-module is configured as "Auto";

Should the automated re-enrollment fail, the Enroll button will appear in the Knowledge Center as usual for manual re-enrollment.

Permissions on Administrating Sessions

Sessions of the same Module could be managed by completely different regional areas. To cater for this scenario, you can define session level security so that access can be targeted to different groups for administrating different sessions of the same module.



These are the key points on the new Session permissions:

- Module level permissions are inherited by default
- The resultant permission access is based on both the module and the session permission settings
- Cloning a course session will clone the session permissions as well

Please refer to the table for how Module Level Permissions can affect Session Level Permissions:

	Permission Setting	Resultant Access	Permission Setting	Resultant Access	Permission Setting	Resultant Access
Module Security	No Access	No Access	Read Only	Read Only	Unrestricted	Unrestricted
Session 1 Security	No Access	No Access	No Access	Read Only	No Access	Unrestricted
Session 2 Security	Read Only	Read Only	Read Only	Read Only	Read Only	Unrestricted

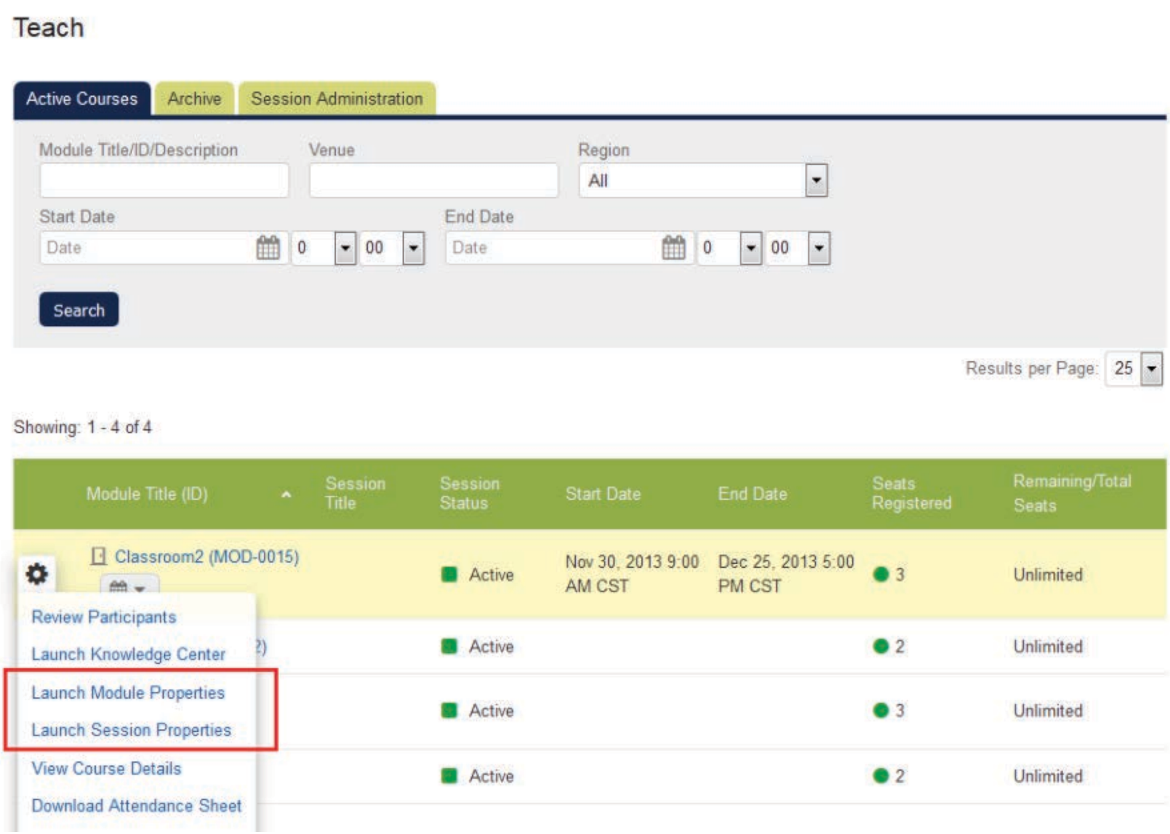
Session 3 Security	Unrestricted	Unrestricted	Unrestricted	Unrestricted	Unrestricted	Unrestricted

The one key point to take away from this illustration is that if the greater access has been granted at the module level say "Write" access but at the session level only "Read" access has been granted then the user would still have "Write" access on the session.

Session Permissions have been applied to the following areas:

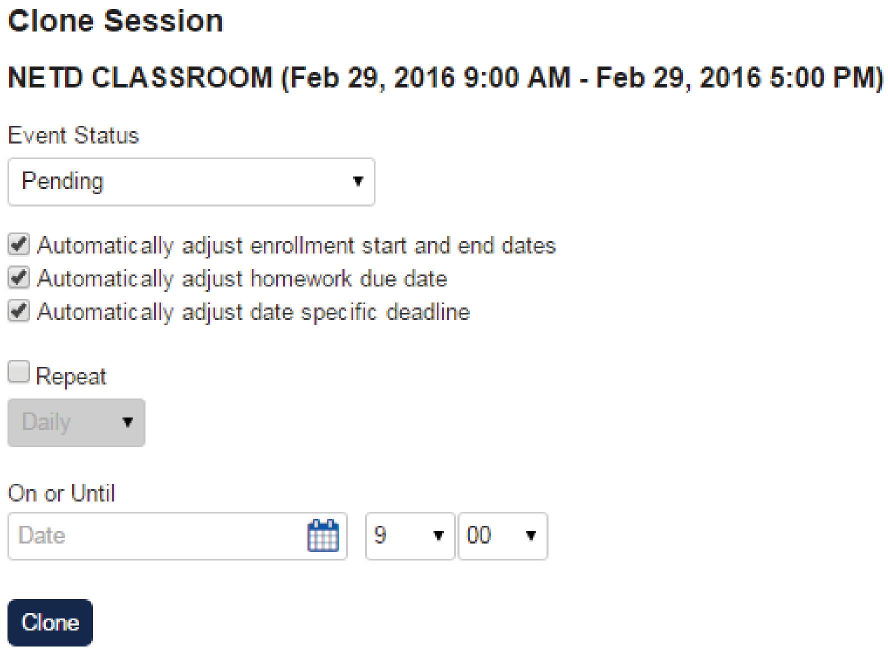
- Catalog Editor
- Data Loaders
- APIs
- Module/Session Selectors
- Reports/Wizard
- Group Enroll
- Teach Review
- Checklist Item Management
- Auto Exception Management
- Question Pool Editor, etc.

For administrators who have not been granted access to the Module, the Session Properties will be accessible from the Teach area:

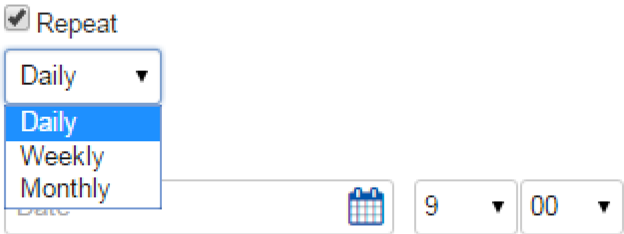


Cloning Sessions

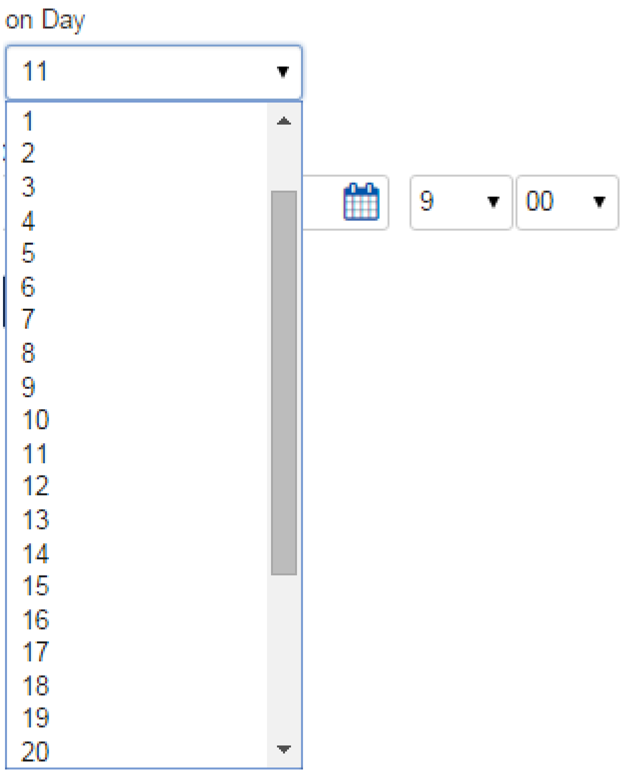
Open a multi-session learning module with the Catalog Editor, select a session and click the Clone button:



When the check box "Repeat" is selected, the administrator can select a "recurring pattern".



When the "Monthly" option is selected, it will show a new "on Day" drop down. The values available are: 1 to 28, "last day of month -2" , "last day of month -1" and "last day of month".



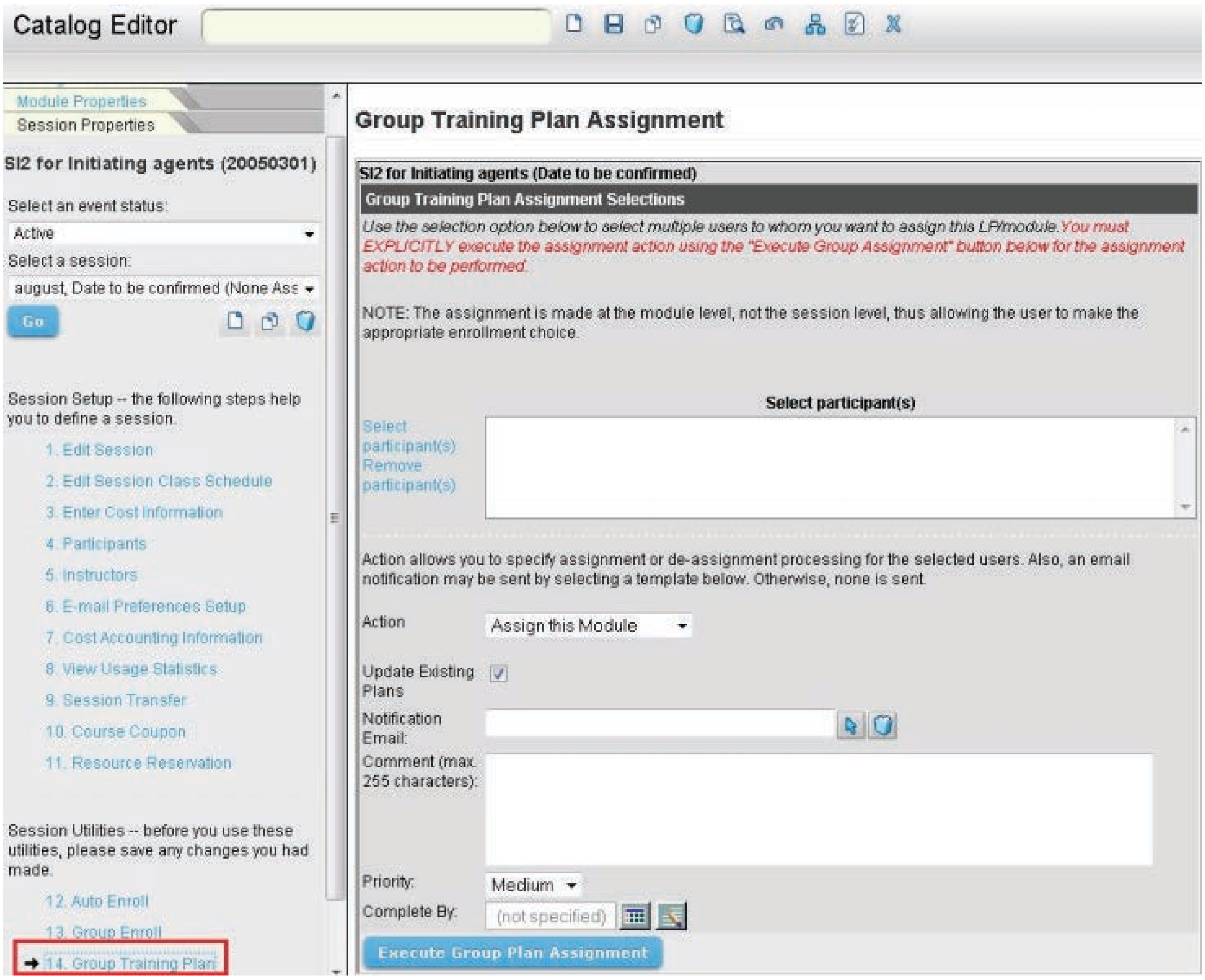
The default value will be the day of month for the start date of the current session cloning from:

- If the current day is 29, the default will be "last day of month -2"
- If the current day is 30, the default will be "last day of month -1"
- If the current day is 31, the default will be "last day of month"

Training Plan Group Assignment

(available for Performance, Learning, and e-Learning only)

This function allows administrators to push out Training Plan assignments to large groups of people at one time. A number of properties are included with this action to enable control over email, priorities, due dates, etc. Assign group training plans at **Catalog Editor** > **Session Properties** > **Group Training Plan:**



You can

- Select participants and groups as described in Enroll Multiple Individual Users.
- Assign or remove the assignment of the module from the selected participants.
- Notify the participants of the changes by selecting from one of the email templates. If you have any additional comment, you may enter it in the comment text box.
- Specify the priority and expected completion dates of the module.

You must explicitly click Execute Group Plan Assignment for the plan to take effect.

The participant can view the plan under the Career Development > Training Plan and in their Learning Path.

The Task Learning Type

The Task learning type is a lightweight learning object suitable for tracking on-the-job "snippets" of training. e.g. Training for Machine Operation consisting of the following tasks

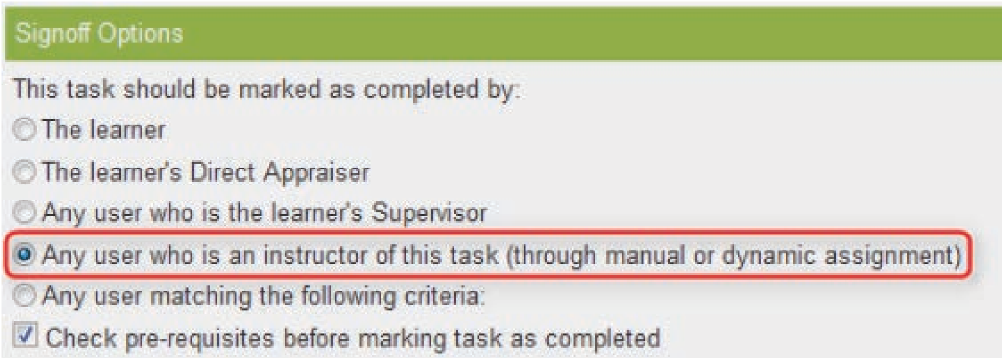
1. Read the machine operation manual
2. Observe demonstration given by a certified trainer
3. Duty manager confirmation for skills acquired

It is similar to the online learning type in terms of configuration but

- mandatory to fill in description field
- does not have cost settings
- has a sign-off section to define the approvers who may confirm the completion of a user's task
- has a task completion reminder that allows a user to remind the approvers to take action on the enrolled task

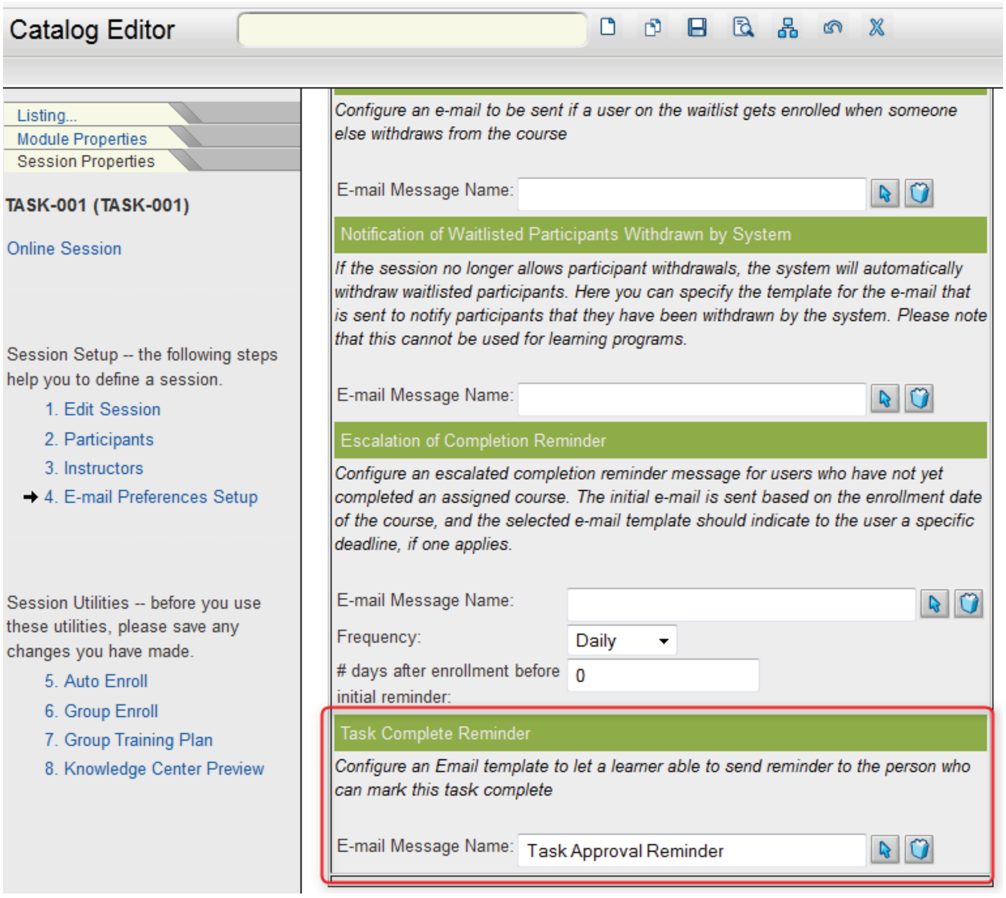
Signoff Options

You can configure who is considered eligible to approve the task using Signoff Options:



Task Complete Reminder

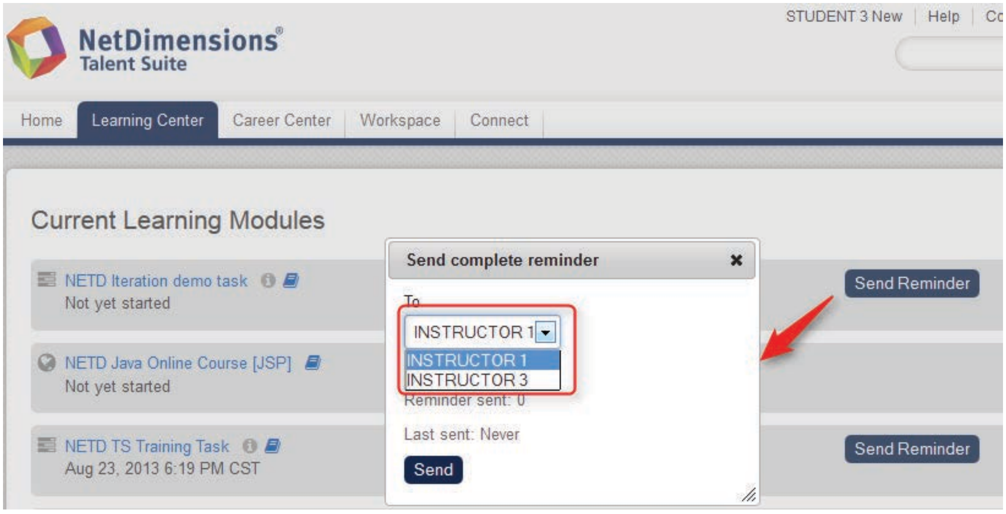
You can configure the e-mail template of the reminder from Catalog Editor.



Learner Task Actions

Based on the sign-off configuration of the Task, a user will have the option to "Mark As Completed" a Task if the sign-off option is set to "Learner". Otherwise, the option "Send Reminder" will be displayed.

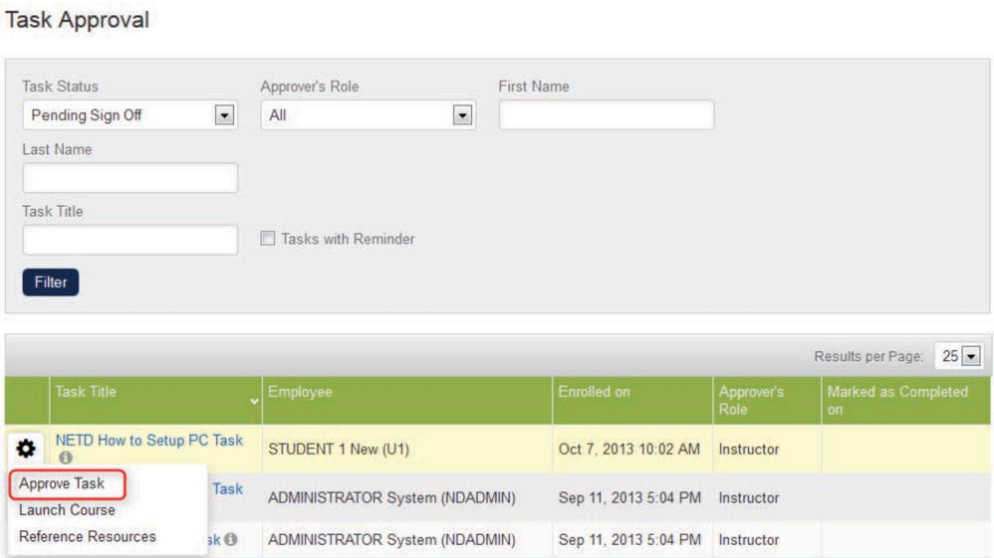
If "Send Reminder" is selected, the user can send email to the approver to remind him/her to sign-off the Task.



Learners can go to "Learning Center -> Current Learning Modules" to send reminders to instructors for task sign off

Task Approval

Approvers can sign off tasks at **Workspace > Task Approval:**



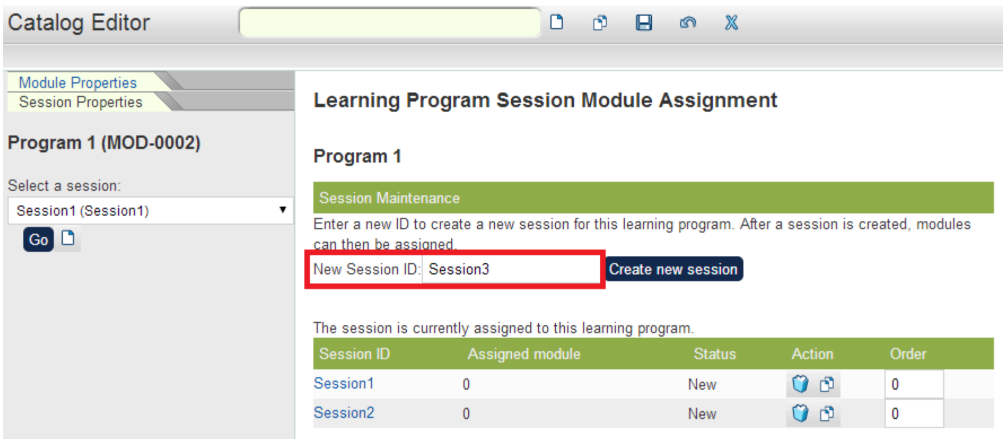
Page is Role Access Controlled using "Task Approval" under Review Submenu Features.

Learning Programs

(available for Performance and Learning only)

Program Session IDs

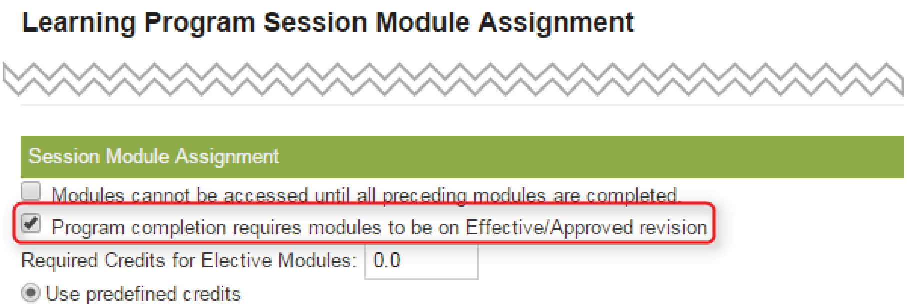
Program Session IDs are generated automatically based on the system configuration "Session Code Generator Format".



Inside Catalog Editor which currently has the Session ID "Session3" automatically generated.

Effective/Approved revision for Program Completion

The "Program completion requires modules to be on Effective/Approved revision" chekbox is available under the "Session Module Assignment" section Catalog Editor > Session Properties



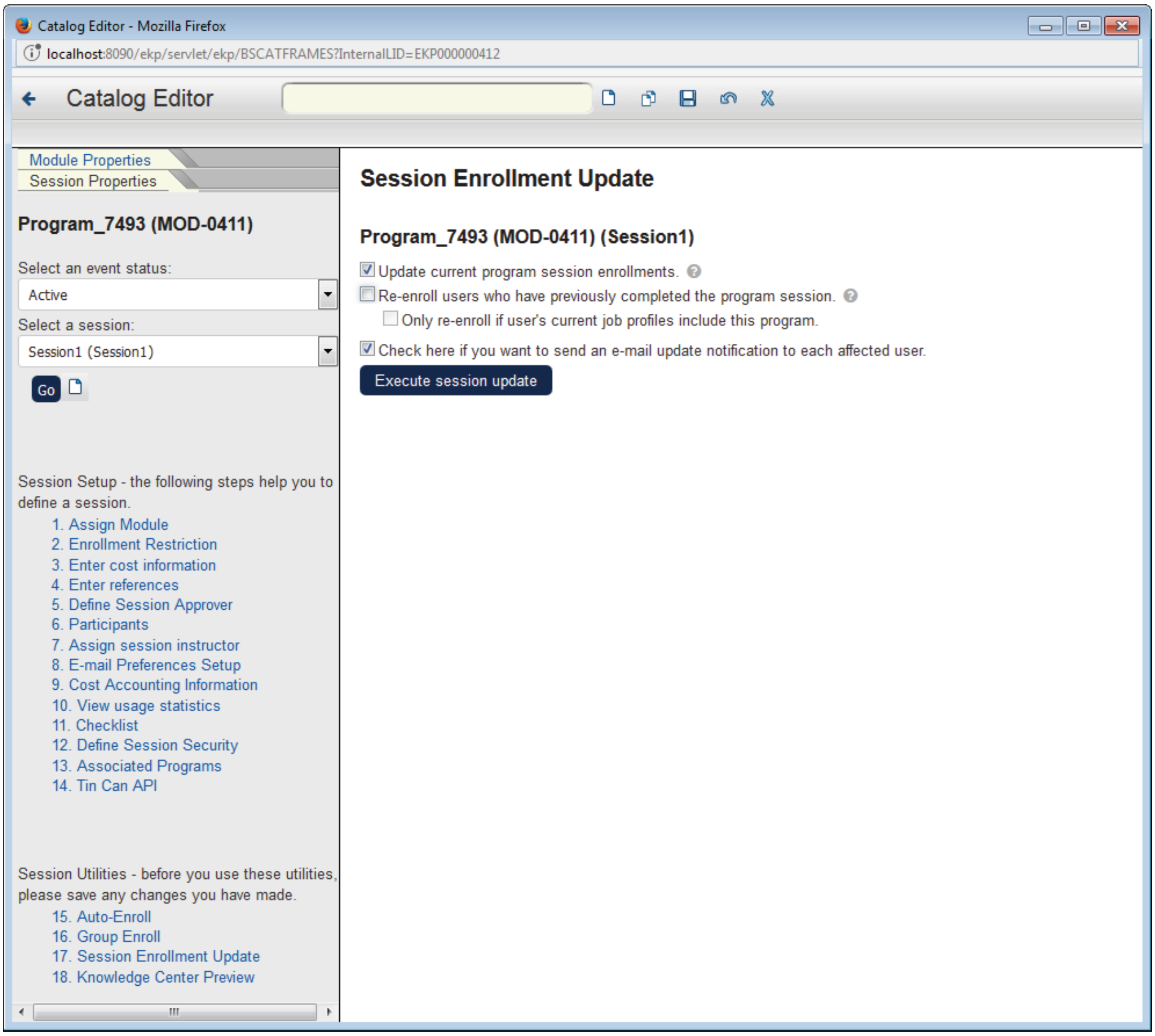
When the option is checked, revisions of sub-modules (if applicable) will be checked for on program completion. Learners can enroll onto the newly published effective/approved version which can be now found in the Knowledge Center if they have not met this requirement.

Session Enrollment Update

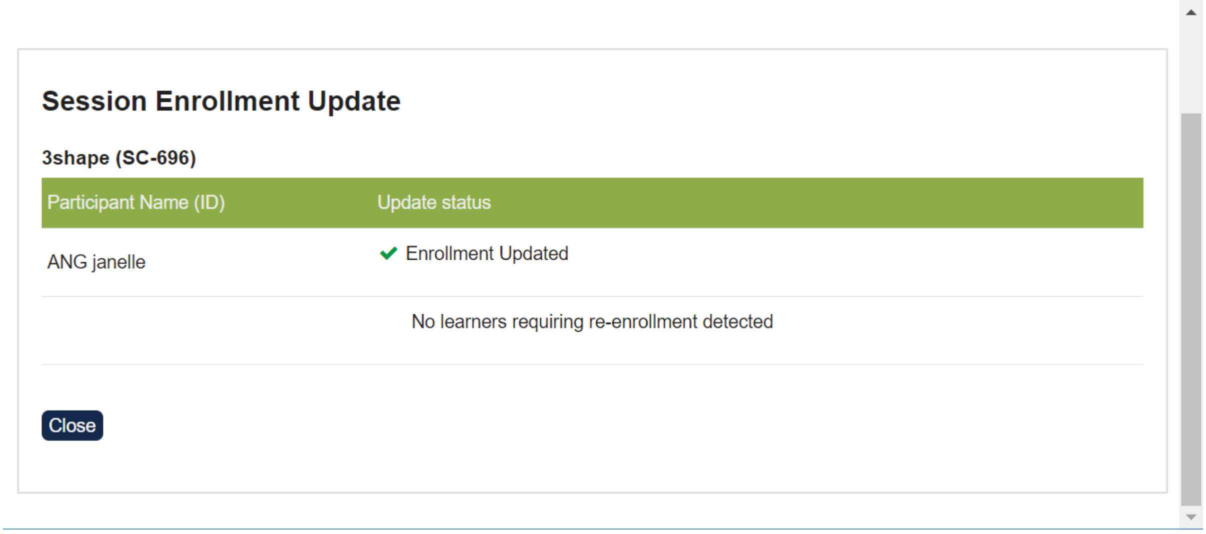
When the structure of a Program Session changes, it is sometimes necessary to explicitly update enrollments to reflect the new structure. This is done using the Session Enrollment Update function under **Catalog Editor > Session Properties > Session Enrollment Update**. The following options are available:

Option	Description

Update current program session enrollments	Only modifies the users enrolled in the current program session. For example, if a new module is added, this update will enroll currently enrolled learners onto the new module as part of the program. Users who have already completed the program are not affected.
Re-enroll users who have previously completed the program session	Re-enrolls users who have previously completed the session. Users who complete the session hereafter are not affected.
Only re-enroll if user's current job profiles include this program.	If checked, only the Users who have at least one current job profile assignment that involves this program will be re-enrolled.
Check here if you want to send an e-mail update notification to each affected user	Send an email update notification to the enrollees.



Click **Execute Session Update** to confirm the update. A message will be displayed informing the user(s) that the session has been changed, and the list of affected user(s) will be listed.

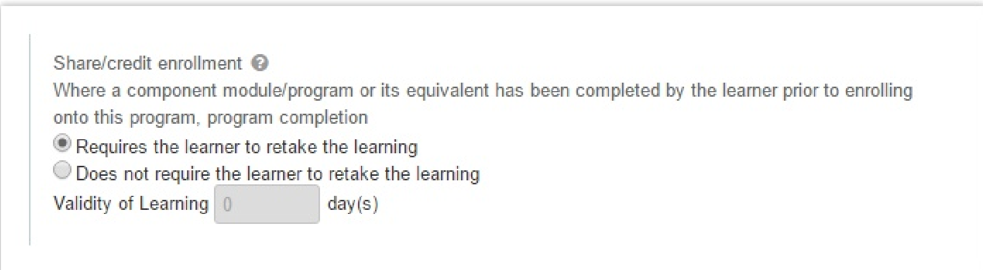


Automatic Program Completion

To have programs complete automatically when the learner has fulfilled the learning requirements, turn the "Enable Automatic Completion of Learning Programs" System Configuration on. When turned off, instructors and/or course administrators will be responsible for setting programs to complete manually for learners.

Share/Credit Enrollment

Where a component module/program (or its equivalent) has been completed by the learner prior to enrolling onto the program, you can specify whether or not the learner is expected to retake the learning using the "**Share/credit enrollment**" setting:



In composite programs, whether or not a sub-program must be retaken will depend on the settings of the immediate parent program. To illustrate, let's consider a simple scenario:

Program	Sub-Modules/Programs	Share/credit Enrollment Setting
Program 1	Module 1, Module 2	Requires the learner to retake the learning
Program 2	Program 1, Module 3	Does not require the learner to retake the learning

1. Learner enrolls on Program 1 and completes Modules 1 and 2 to complete Program 1
2. Learner enrolls on Program 2, which does not require the learner to retake any completed learning therefore he only needs to complete Module 3 to complete Program 2
3. Learner re-enrolls onto Program 1, which requires the learner to retake completed learning, so, even though he has completed Module 1 and 2 before, he needs to complete them again

Composite Program Management

Assigning Programs to a Composite Program

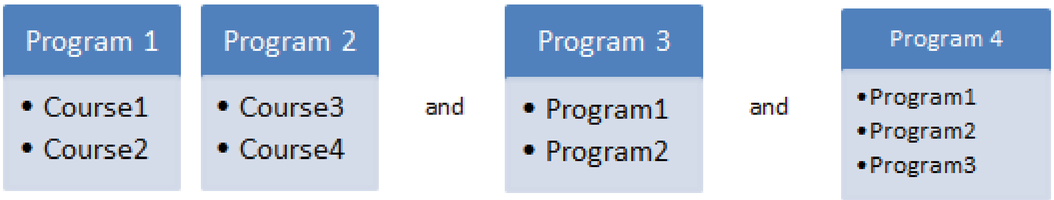
Apart from assigning modules/program(s) to a learning program, selecting a program session is also made possible. This means that once a program is assigned, appropriate session can be selected from the given selection. Although there are restrictions to the programs that can be made available for selection as follow:

- **Only programs with active sessions are displayed**

A program with session status equals to pending, completed, closed, cancelled, investigation only, or retired will not be displayed in the assigned learning module selector.

- **Programs containing the current program cannot be selected (cyclical dependency is not allowed)**

A user cannot assign a program if it is already a part of the program. Given the example below:



With these program settings, the user cannot assign the following scenarios:

- Program 4 to be part of Programs 1, 2, and 3
- Program 3 to be part of Programs 1 and 3

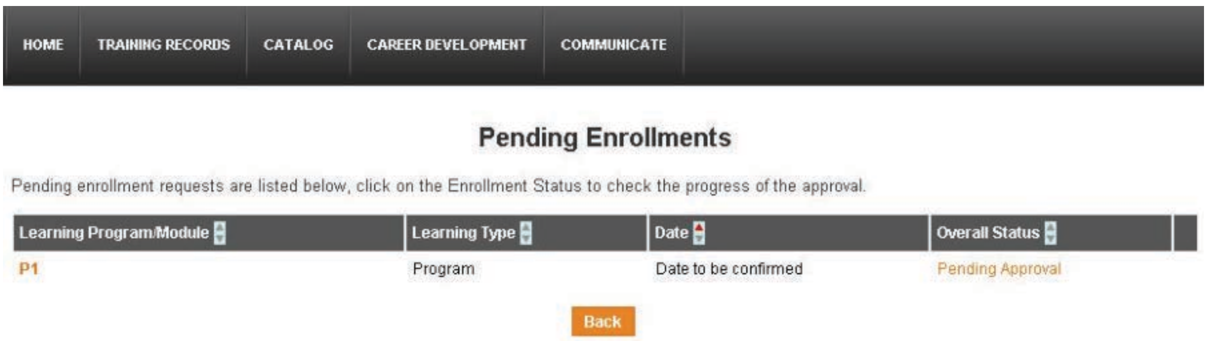
- **Current program cannot be selected**

A user cannot assign a program that is currently selected.

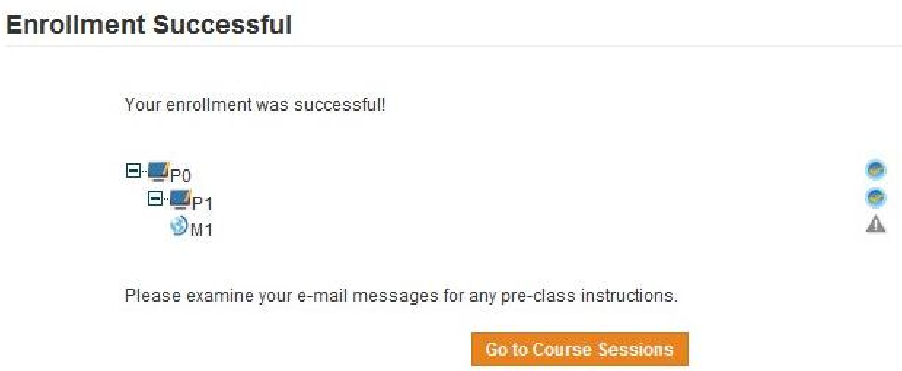
Approving Composite Program

Enrolling to composite program overrides the status of its children, existing program modules and sub-programs in pending approval status will be changed to not started by a composite program enrollment.

Given the example scenario, a composite program P0 contains P1 and P1 contains M1. P1 requires approval. Once the user enrolled to P1, the enrollment for P1 will be in pending approval status.



Whereas, if the user enrol to P0 which does not require an approval, P1(pending for approval) status will be superseded by the P0 status which will make the user enrollment to P0, P1, and M1 successful.

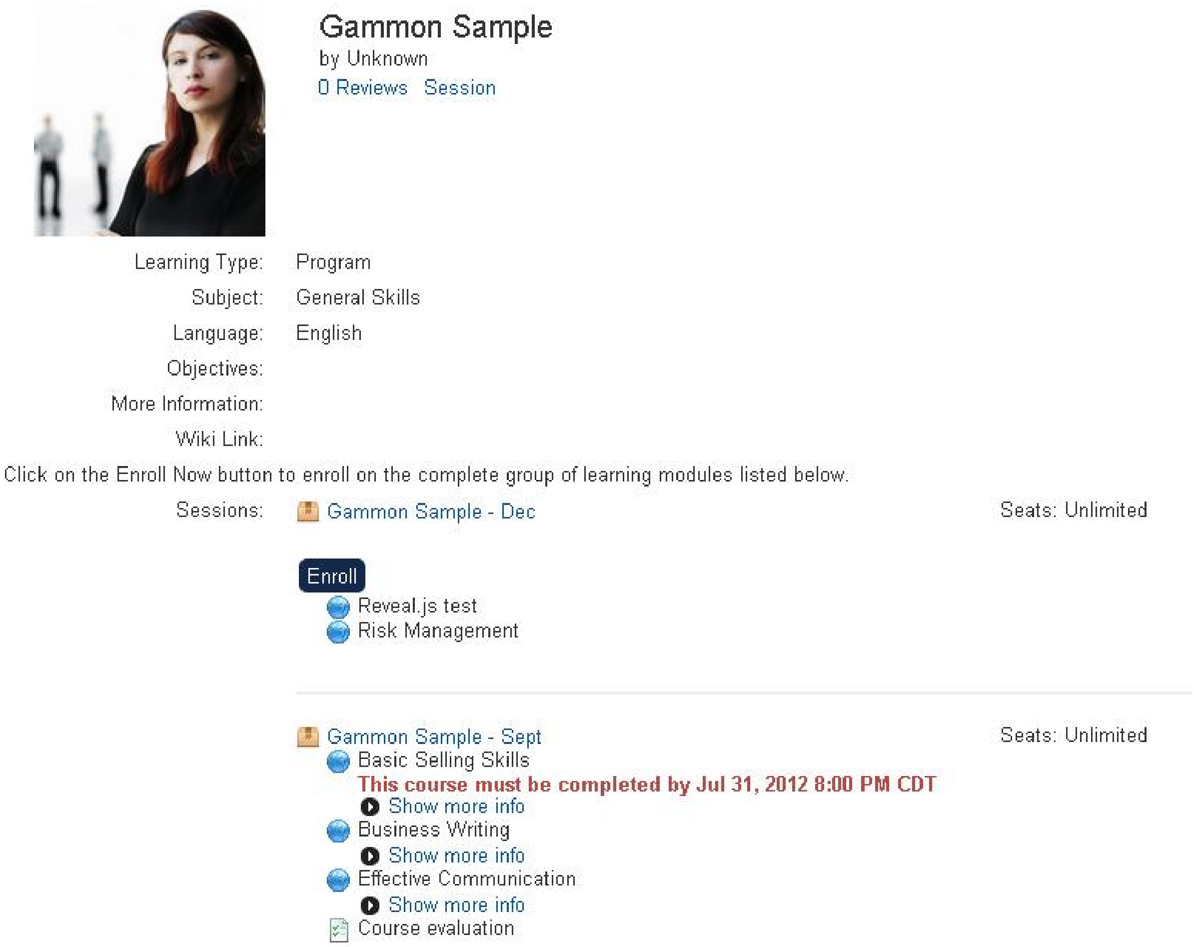


Enrolling Onto Composite Programs

Enrolling onto a composite program would would put the enrollee under the child program sessions that is configured for automatic enrollment.

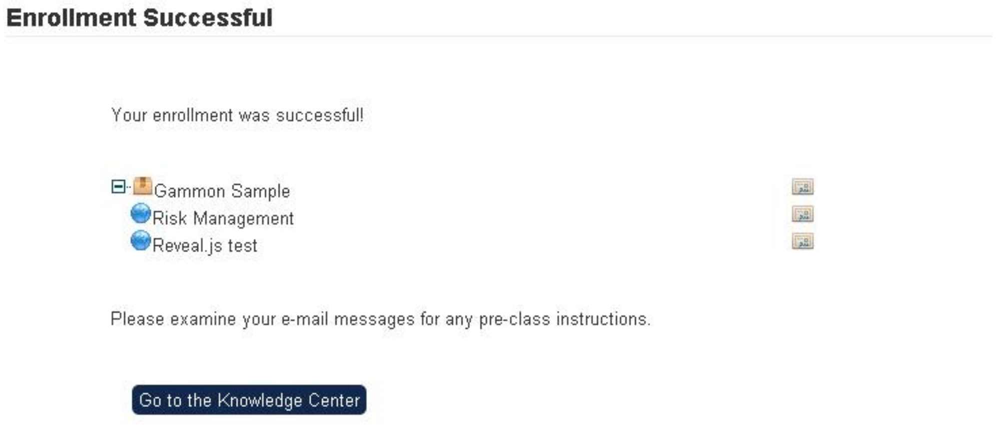
To self-enroll:

- Learners must navigate to a program's catalog page through the catalog browse or search functions.



- Clicking on the program titles will expand or collapse contents of the program and clicking on one of the Enroll buttons will enroll the user onto the adjacent program session.
  - If the top-most program has an enrollment policy that involves approval, the normal

approval flow will apply.
- If no approval is required, the learner is enrolled immediately.



- The enrollment status message for a given course can be seen by hovering the mouse over the adjacent status icon. In addition to existing enrollment processing rules, enrollment onto a composite program may fail for one of the following reasons:
  - The composite program involves one or more programs in which the learner is already enrolled onto a different session
  - The composite program has been configured in such a way that the system is unable to calculate a cost

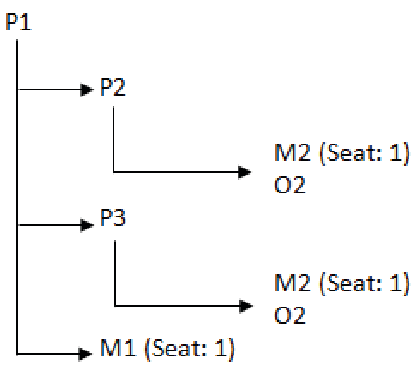
Accessing Composite Programs after Enrollment

Learner/Reviewers can access composite program records by expanding or drilling down into the top level program at:

- (Review) Current Learning Modules
- (Review) Records/Transcript
- (Review) Learning Path
- Knowledge Center

Waitlist Handling in Composite Programs

Enrollment to composite program will be put into waiting list if any of the learning module in the composite program tree is full. Enrollment will only be triggered when someone withdraws from the full learning module. Given the example a composite program hierarchy with P1 as the top-level program which contains two sub-programs P2 and P3, and a class module M1. Both P2 and P3 contain one classroom module and one online module. All classroom modules have a seat limit of 1, and there is no seat limit for all online modules. The composite program tree structure looks like the following:



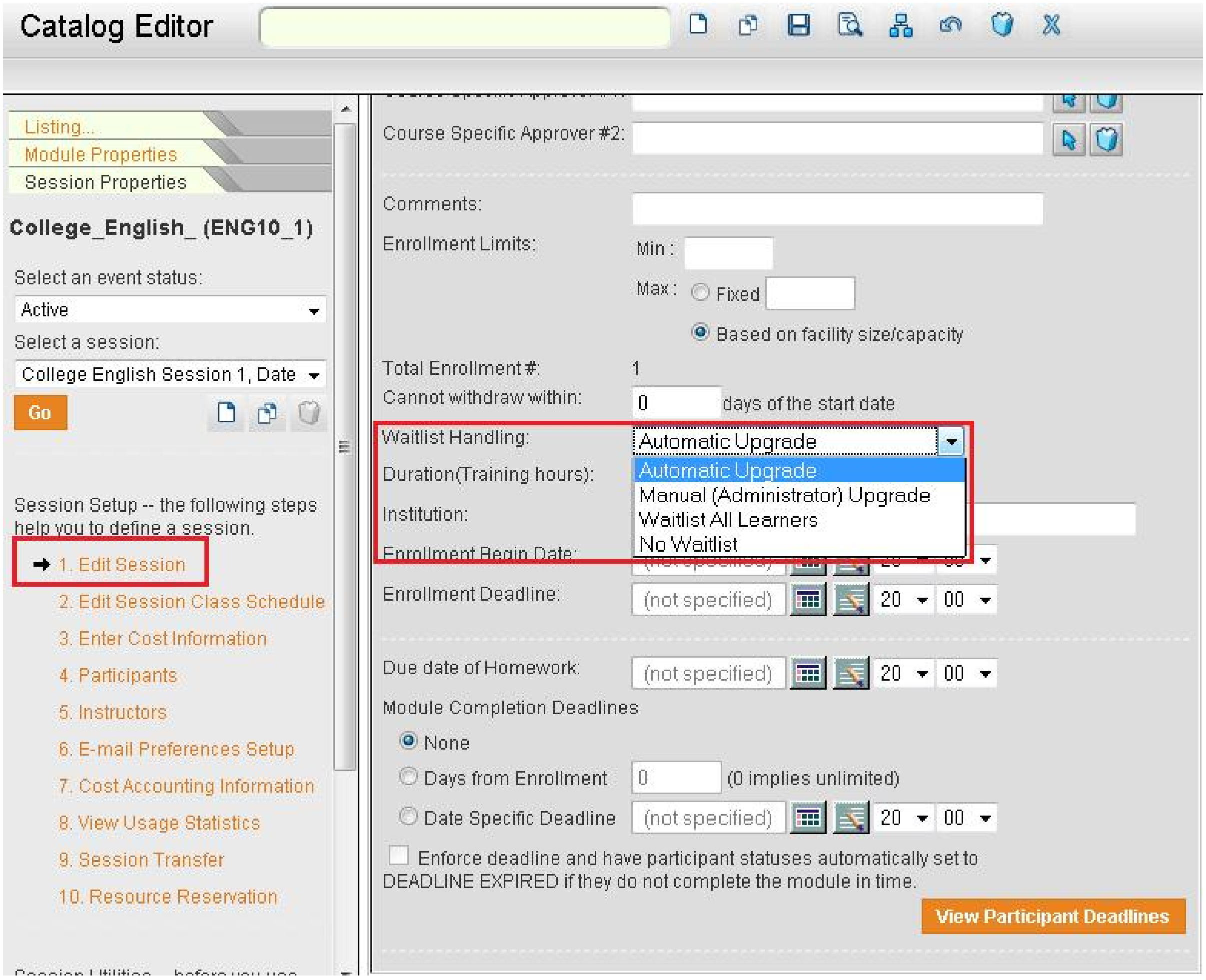
If a learner1 enrols into P1, the enrolment will be successful. However this will make M1, M2, and M3 to become full, which will cause every single item in the tree to become full as well. If a new learner2 enrol to P1, learner to will be put to the waiting list. Same thing happens when learner3 and learner4 enrol to P1, they will be put to the waiting list.
If learner1 decided to withdraw from P1, learner2 will triggered first and be enrolled successfully

Note: the waitlist enrolment triggering is based on the chronological enrolment order from all of the waitlisted enrolments within the composite program tree.

A trigger does not guarantee a successful enrollment. It just tries to enroll a waitlist enrollment. All involved waitlist enrollments will be triggered based on their chronological enrollment order. Waitlist enrollments will only be triggered if the waitlist is set to automatic upgrade.

To set waitlist to automatic upgrade:

1. On the **Session Properties** of the selected program/module, select **Edit Session.**
2. Click the **Save** icon to save the changes.

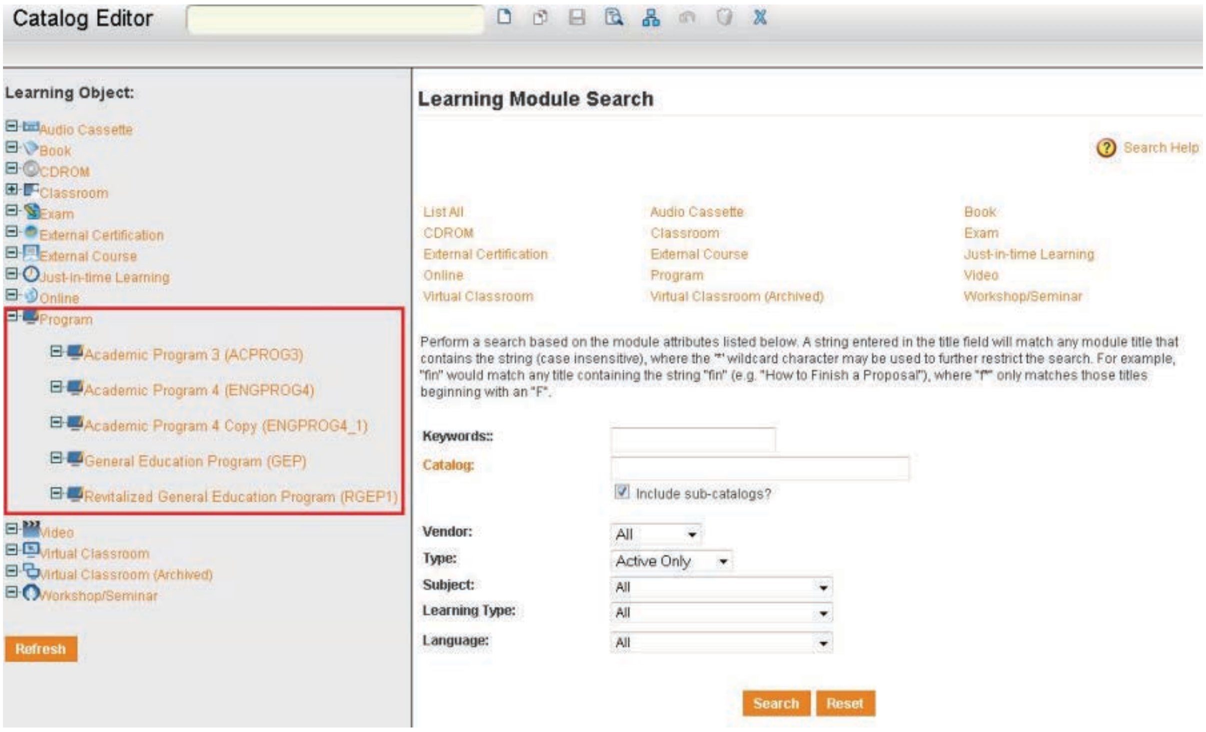


Deleting Programs

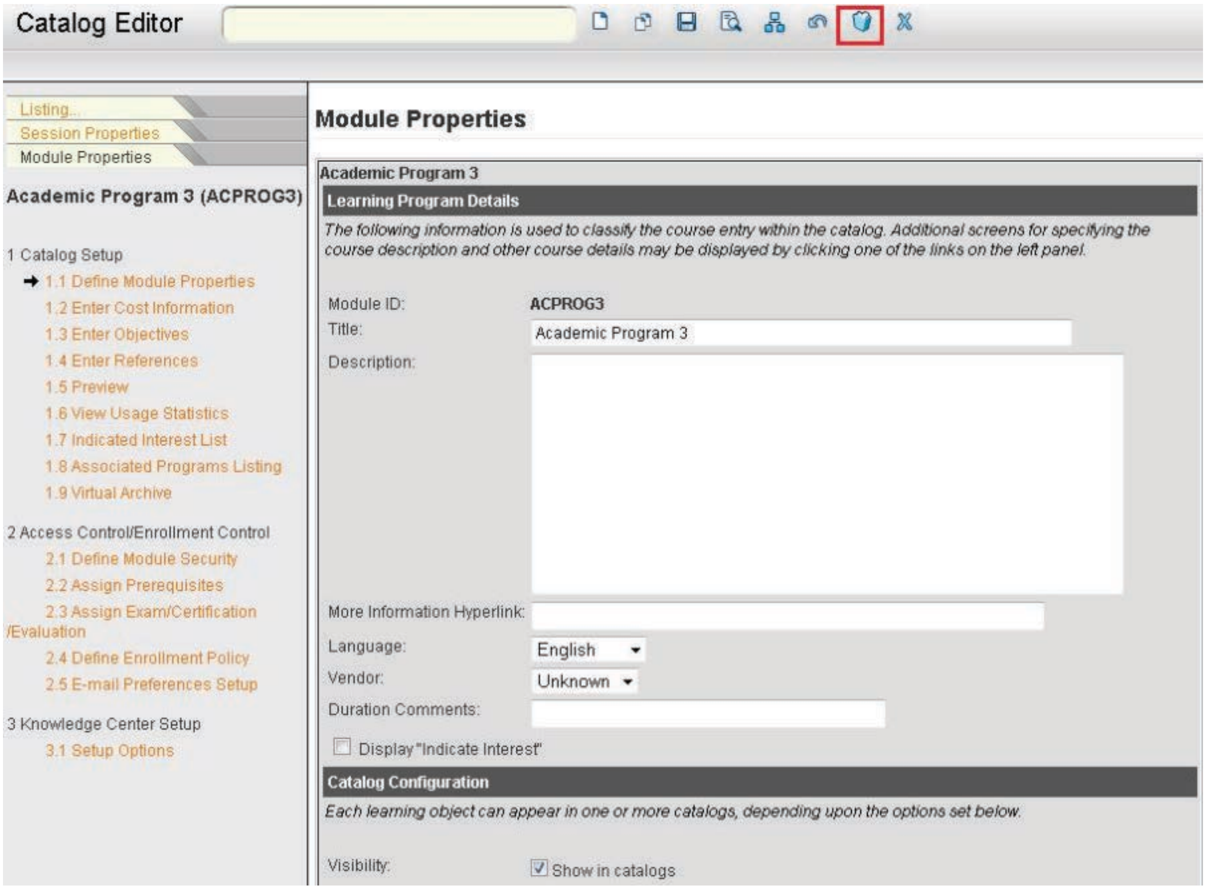
Deleting a program will permanently remove:

- the Program from the LMS
- the relationships between the program and its direct children
- the relationships between the program and its parent programs
- all the transcripts for the program (including descendant transcripts)

To delete a learning or a composite program, select the program you want to remove in the **Catalog Editor** page:



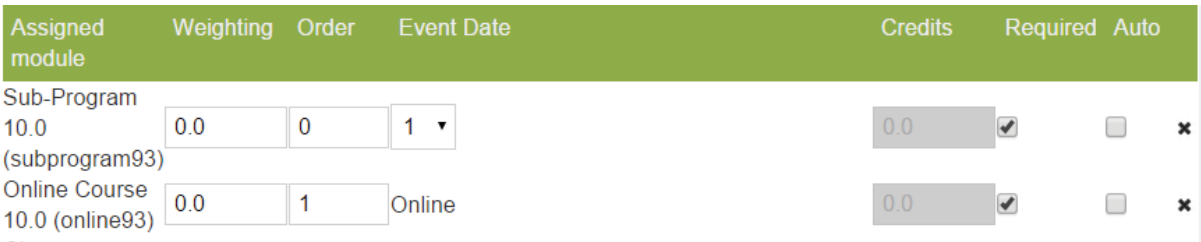
The module properties of the selected program will be displayed. Click the **Delete** icon from the toolbar.



Learning enrolled on outside program automatically credited

There are scenarios that a program module is not enrolled along with the program enrollment, the linkage and credit between the program and its modules were done at the point of the program enrollment, thus these are not automatically updated for enrollments which happened before or after the program. Such scenarios could possible arise:

1.With the Auto checkbox made configurable for mandatory program modules, sometimes a mandatory program module is not enrolled along with the program enrollment.



2.If the program module transcript was inserted via the CSV loader.

3.If a classroom has multiple sessions, the user has completed another session of the class which is different from the session assigned to the program session.

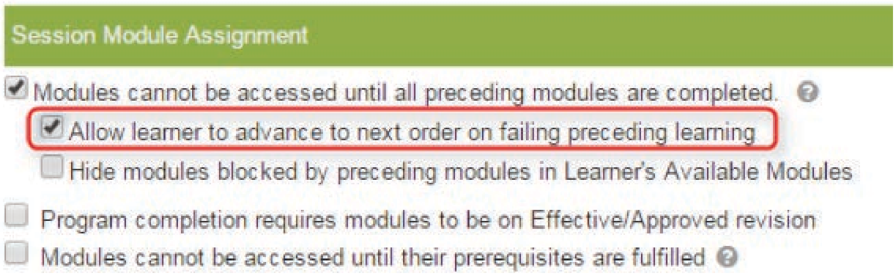
4.When a program sub-module (or sub-program) is enrolled outside of an incomplete program, the learning should be automatically linked to the program and credited for:

- Learning enrolled upon after program enrollment should be linked/credited for
- Learning enrolled upon before program enrollment should be linked/credited for
- Learning entered via loader (TURBO is not supported) should also be linked/credited for
- Any learning session (except sub-program) should be linked/credited for

Only program enrollments whose status are either "NOT STARTED" or "IN PROCESS" are benefited by this feature.

Enforcing Program Module Order

If there is an order that you would like learners to complete the modules in, check the "Modules cannot be accessed until all preceding modules are completed" checkbox under **Session Properties > Assign Module**:



You can specify the order using the **Order** column. Modules with the same value for Order will be grouped together and learners will be able to take any module within the group as long as all preceding modules are complete.

Advance to the Next Program Module on Failing

In order to provide more flexibility in the sequence of taking courses within the program, there are times that failing a module should not deter a user from taking the next one especially if they are scheduled training with time concerns. The LMS can accommodate learners to continue with next program module after failing a module.

If "Allow learner to advance to next order on failing preceding learning" is checked, failure of a preceding module can allow the enrolled learner to advance to the next module in order. Similarly, failing the equivalent substitute of the target program module can also let the learner advance to the next one.

If a program does not require retake the learning, and a learner has failed the same program module before the program enrollment outside, the learner has to pass/fail the module again after the program enrollment within the program context, in order to take the next one in order.

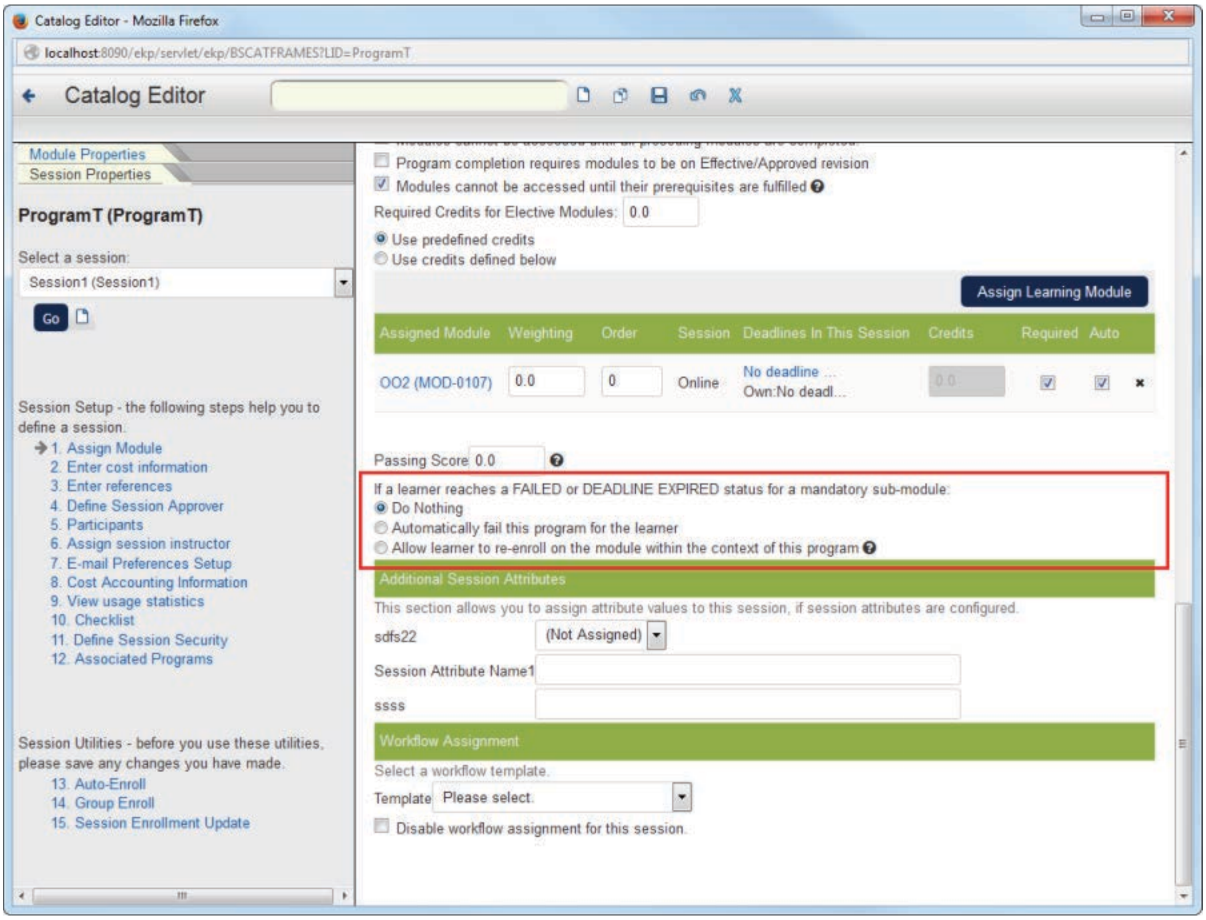
Show Current Program Modules Only

Some programs can contain tens of modules and are intended to take years to complete. Learners may be daunted or distracted by seeing the vast amount of learning involved in such programs. To release program modules progressively rather than all at once, use the "*Hide modules blocked by preceding modules in Learner's Available Modules*" under the enforce ordering option in Program Session Properties.

When checked, the not-yet-enrolled and inaccessible modules (modules that are blocked due to ordering) are hidden in the following areas:

- Knowledge Centre - Available Modules
- Learning Path Display
- Appraisal Learning Path Display
- Career Development Center Learning Path Display
- Training Plan (when shown as a part of Learning Path)
- API (userJobProfilePath)
- API (LearningPath)

Failed and Deadline Expired Program Modules Handling



When a learner fails or does not complete sub-modules in time, depending on the nature of the program, the program itself should fail, or it may be something more manual, or they may need to retake the learning whilst keeping a record of the previous failed/expired transcript.

The following three options are added to the Catalog Editor > Assign Modules for Programs:
If a learner reaches a FAILED or DEADLINE EXPIRED status for a mandatory sub-module

- Do nothing
- Automatically fail this program for the learner
- Allow learner to re-enroll on the modules within the context of this program

Note: Enrollment Checks like approvals, prerequisites, wait listing, etc. may still apply.

These options are also available at the System Configuration setup page for configuring the default values:

Default Failed and Deadline Expired Program Modules Handling

- (•) Do Nothing
- ( ) Automatically fail this program for the learner
- ( ) Allow learner to re-enroll on the module within the context of this program

11.2

Configuration Option Description

Option

Default Failed and Deadline Expired Program Modules Handling

Description

The default setting for failed and deadline expired program modules handling when creating new programs.

Special Notes

These are some key points on the new program options:

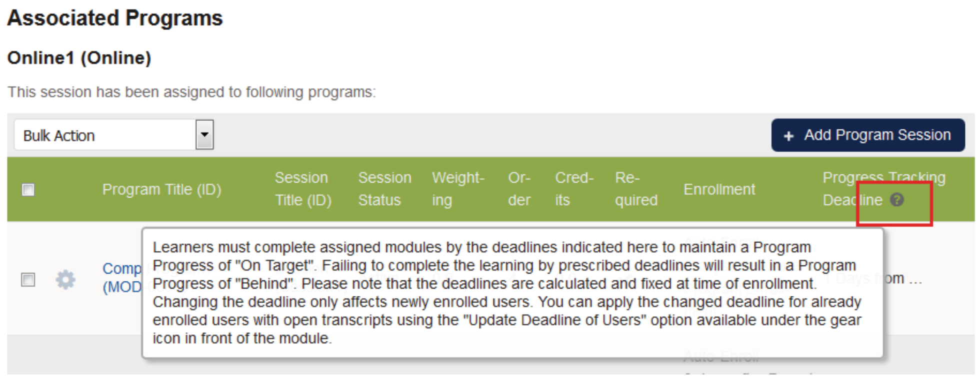
1.The System Configuration option "Trigger to Fail Top Program if Any Child-Level Required Component Fails" is being phased out and this option has been made configurable at the program level with one of the above options. For upgrade, the migrated program option value will depend on the existing System Configuration value for existing programs.

2.Since this has now become a program setting, unlike previously where if a program sub-module fails, the failure could roll up all the way to the very top parent program in a composite program structure, the failure roll-up now takes into consideration of the immediate parent program setting which may terminate in midst of the composite program hierarchy.

3. If Option 3 is selected, in the Knowledge Center, the failed/expired modules will be listed as Available Modules for re-enrollment. The "Auto-linking", as part of the program curriculum, will work even if the learner re-enrolls the module outside

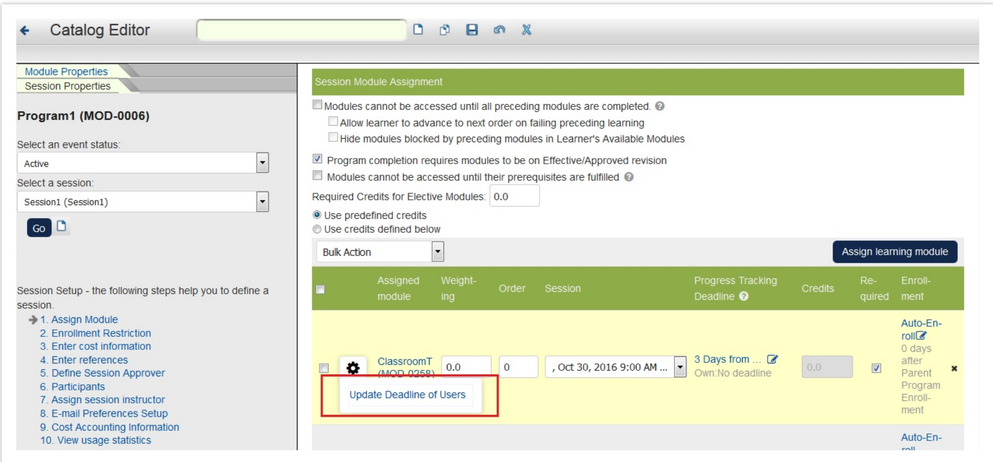
Progress Tracking Deadline

You can assign module completion deadlines in the context of a given program enrollment:

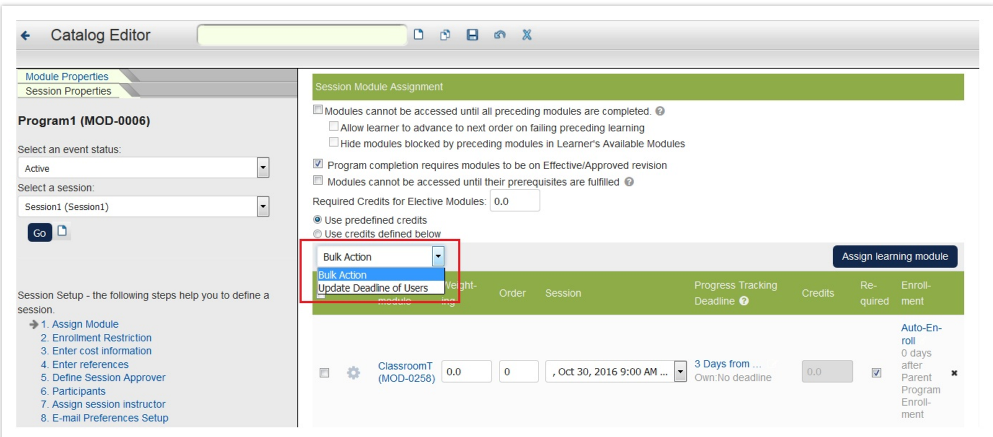


Updating Deadlines at program level

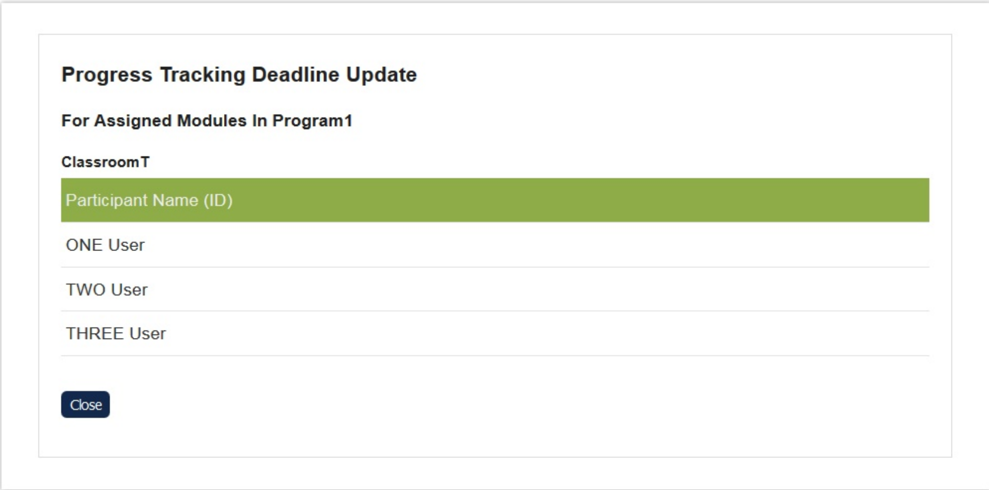
At Program level, this can be accessed through Catalog Editor > Session Properties > Session Module Assignment > Assigned module. Click on the gear icon and select "Update Deadline of Users".



This function is also available as a bulk action.



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

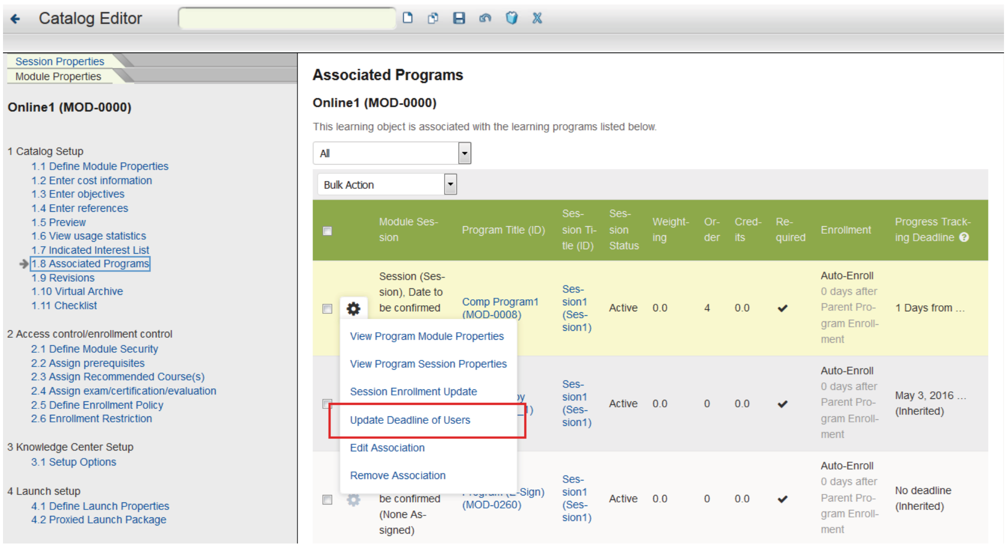


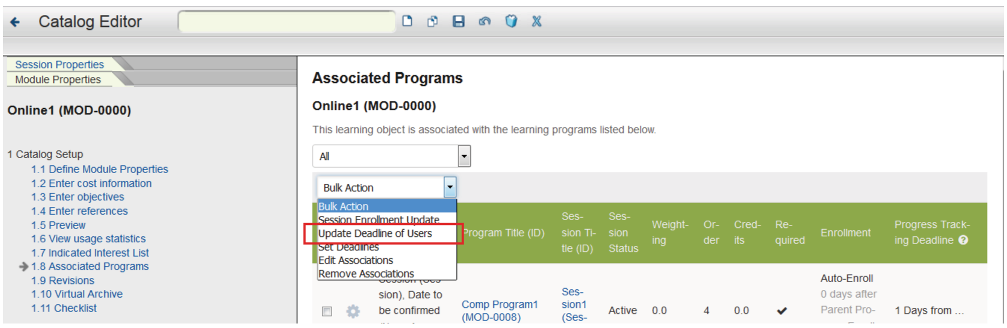
Updating Deadlines At module level

At module level, this can be accessed via:

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

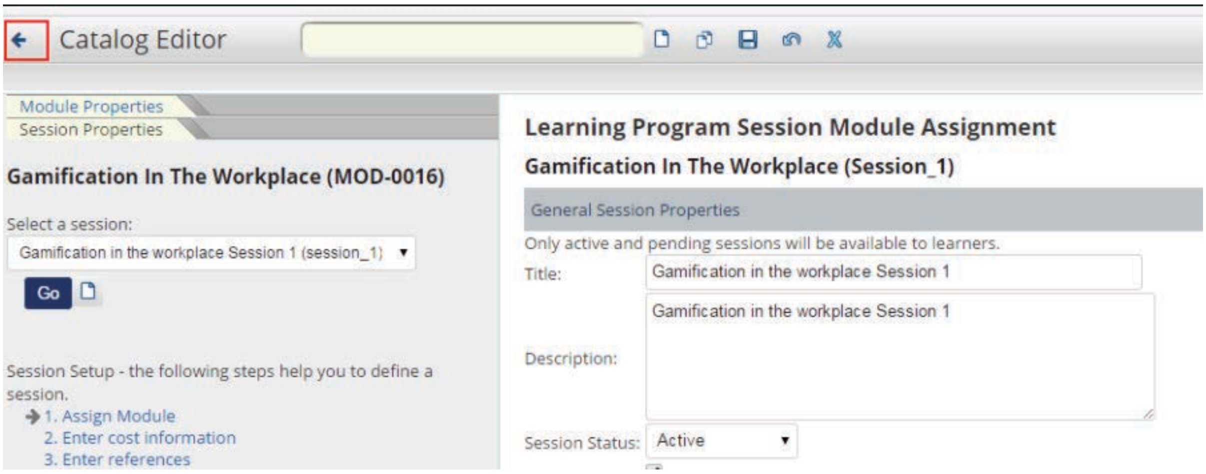
The " ***Update Deadline of Users*** " option can be accessed in the gear icon in both locations. The progress indicator and the pop-up screen showing status updates are available in this level as well.



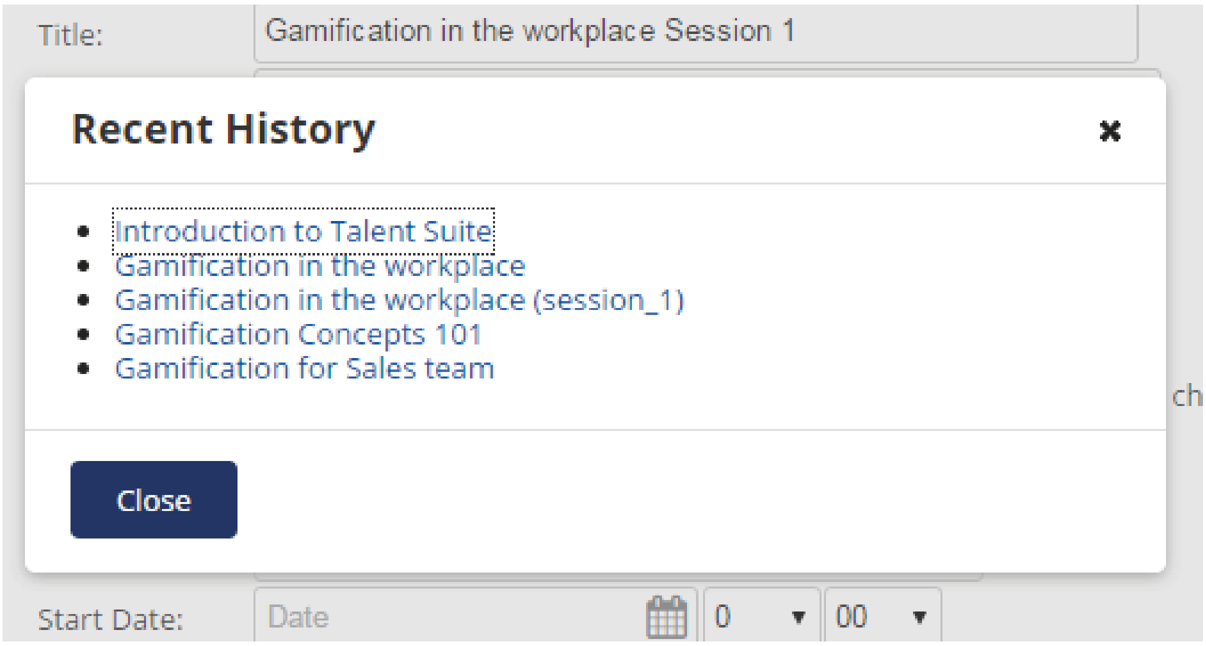


Recent History at Catalog Editor

Inside the Catalog Editor, you can view recent history as bookmark links. These bookmarks are only stored for a particular user session starting from the point of logging in. To bring up the history list, you would need to have browsed some modules/programs first in order to store some navigation history after which an arrow icon would appear in the top left corner:

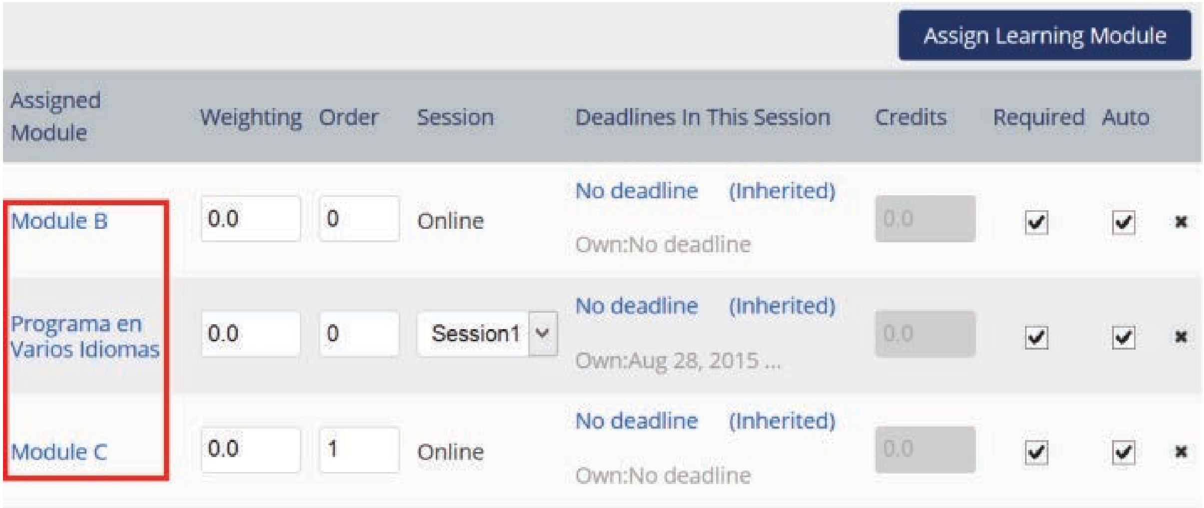


Clicking on the "arrow" icon launches a dialogue that lists all the visited Module and Session properties pages since log in:



You can click on any link on the "history" list to quickly go to that particular course in the Catalog Editor.

Another nice usability improvement would be to be able to quickly go to the module if it's assigned to a program session. A sub-module quick link has been added to the program assigned module list.


Assign Learning Module
Assigned Module
Weighting
Order
Session
Deadlines In This Session
Credits
Required
Auto
Module B
0.0
0
Online
No deadline (Inherited)
Own:No deadline
0.0
Programa en Varios Idiomas
0.0
0
Session1
No deadline (Inherited)
Own:Aug 28, 2015 ...
0.0
Module C
0.0
1
Online
No deadline (Inherited)
Own:No deadline
0.0

Importing Courseware

This section of the guide describes how to import courses into the LMS. When you import courses into the LMS you can record and track enrollments, learner progress, assessment scores and other administrative data according to each course's data model and communications standards.

Courses are usually collected into content aggregation packages. These are zip files containing all of the files that make up a course. When you import a course package, it is validated according to its data model and communications standard, and then stored on your learning content server.

You can import individual courses on an ad hoc basis, or bulk import multiple courses at once by compressing them into a single zip file. With the Course CSV Loader you can also update the learning modules created from imported course packages.

To facilitate communication between NetDimensions LMS and other administration and analytics platforms, the LMS supports the following data model and communications standards:

- SCORM
- xAPI (also known as Experience API or Tin Can API)
- cmi5
- AICC

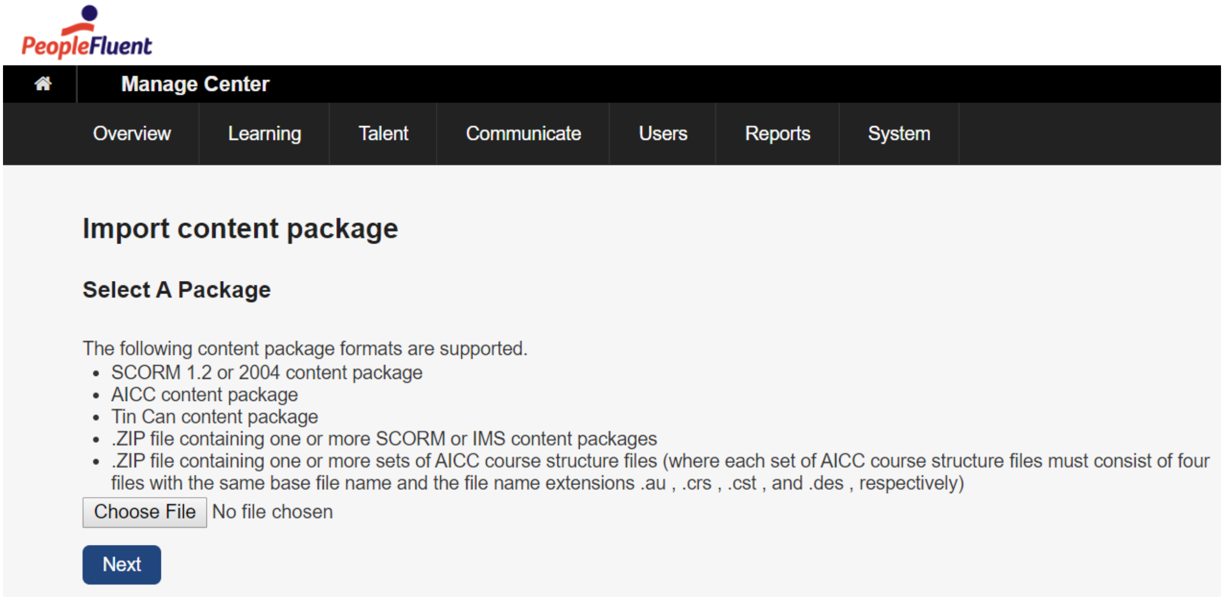
You will need to know which standard your courses use.

For newly imported courses NetDimensions LMS provides the option to use the Rustici Engine to track learners, using the standards listed above. For more information about Rustici Engine, and each standard, see the Rustici Software website.

> **Note**
> If your courseware is authored in a Package Exchange Notification Services (PENS) compliant tool, such as gomo authoring, you can publish courses directly into NetDimensions LMS. Before you import and configure courseware, it is good practice to set up and configure the catalogs that you want to assign courses to when you import them. (For more information about catalogs, see the Catalog Administration Guide.)

Importing New Course Packages

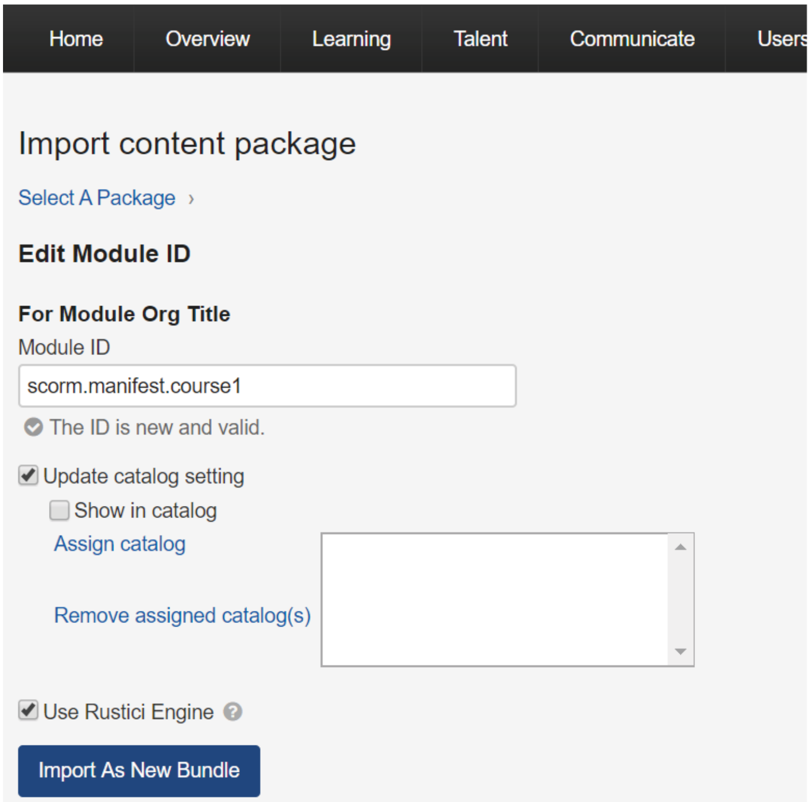
To import course packages, go to **Manage Center > Learning > Import > Import content package**.



On this page you can import individual course packages or multiple course packages by combining them into a single zip file.

You can import SCORM, xAPI, cmi5 and AICC based courses.

Click **Choose File** to select the content package to import, and then click **Next**.



Module ID

For SCORM compliant packages, the Module ID that the LMS will use to identify the course defaults to the <manifest> element's **identifier** attribute in the manifest file (used to identify SCORM packages). You can change the Module ID to fit your organization's naming conventions. Module IDs cannot contain spaces.

Update catalog setting

To assign the imported course to one or more catalogs, select the **Update catalog setting** check box, and then click the **Assign catalog** link to select the catalog(s).

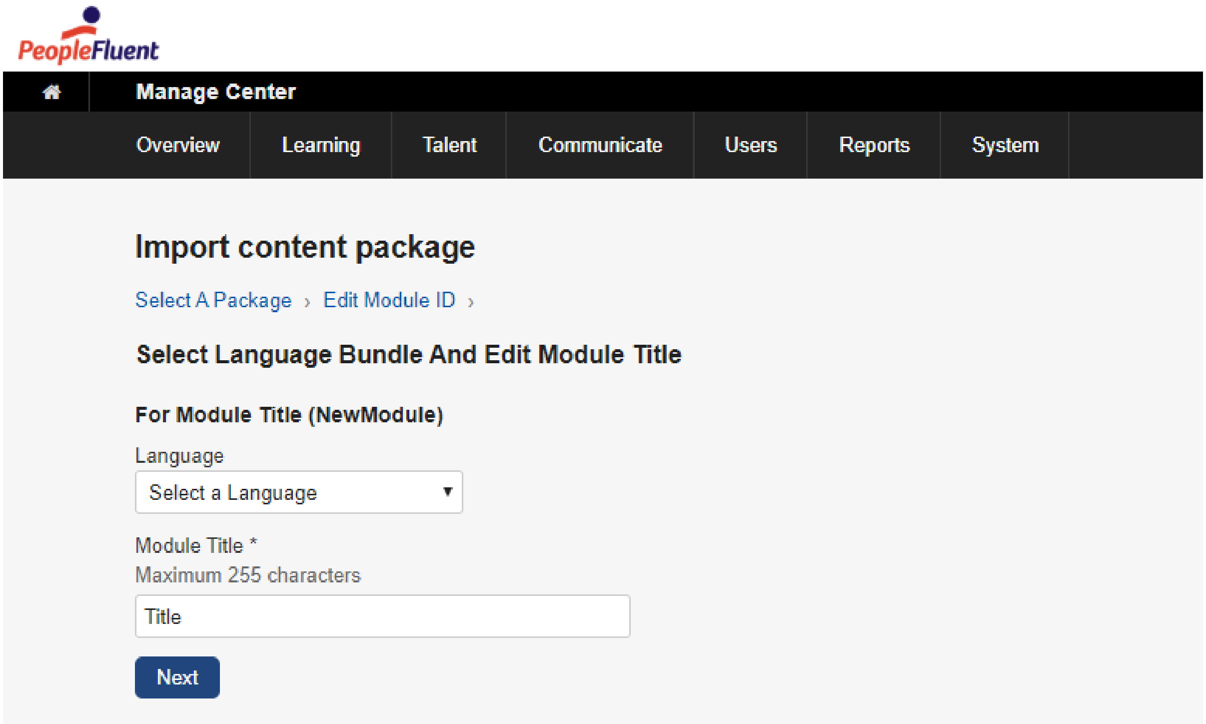
To remove the course from its assigned catalog(s), click the **Remove assigned catalog(s)** link.

To show the course to learners when they search or browse catalogs, select the **Show in catalog** chec k box. If you leave this check box unselected, the course will not be shown to learners.

Use Rustici Engine

Depending on your specific NetDimensions LMS implementation, and if Rustici Engine is enabled, this check box may be selected by default. When this check box is selected, imported SCORM courses are registered in the Rustici Engine to track learner activity. To use the previous NetDimensions LMS SCORM engine, clear this checkbox.

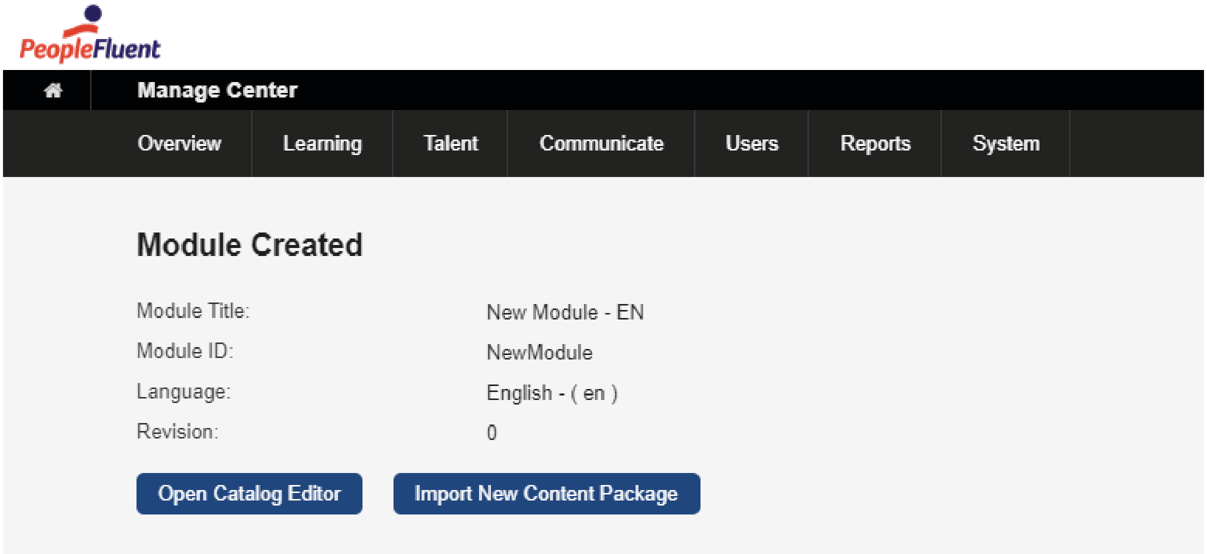
Select a language and edit the module title



Select the course language from the drop-down list.

The module title defaults to the <title> element of the first <organization> element in the course content package manifest file. You can change it, if required.

Click **Next**. The **Module Created** page then summarises the course information you entered on the previous pages.



After a successful import, you can configure the course as a learning module in the Catalog Editor, or you can import another course content package.

For more information about configuring learning modules, see Module Properties.

Importing Multiple Courses

You can import multiple new course packages at once by compressing them into a single zip file. As each courseware package is a zip file containing the files comprising the course, you are packaging multiple zip files into a single zip file.

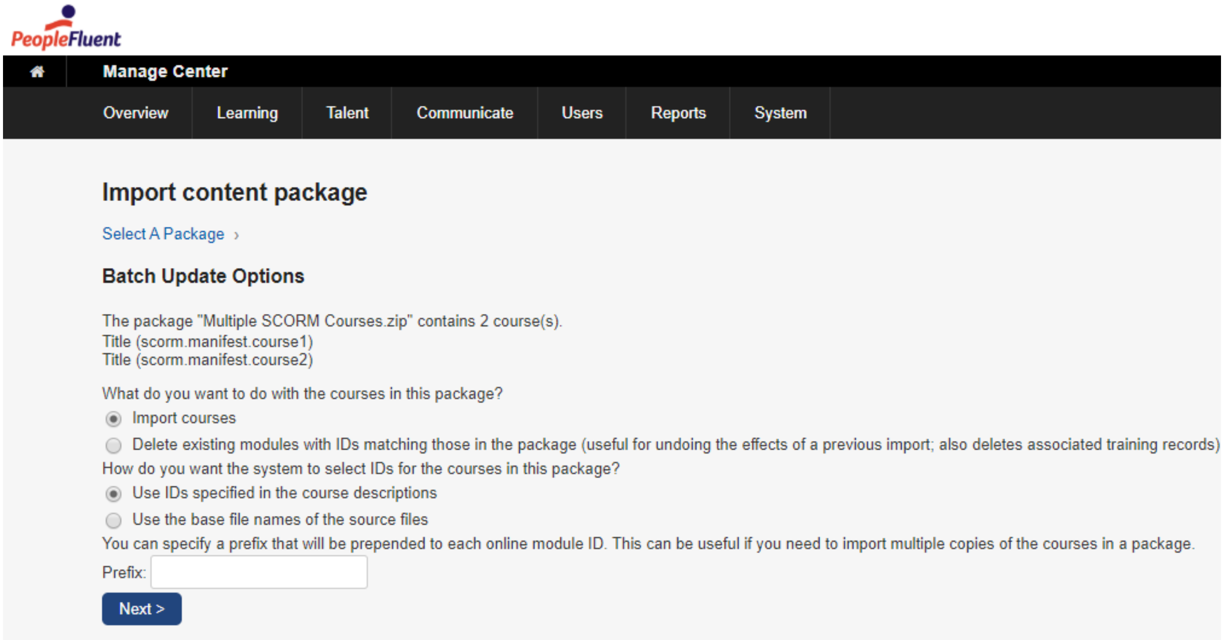
> **Note**
> You cannot upload new versions of existing courses by combining them into a single zip file. The batch upload process will fail.

To create a single zip file containing your courseware packages:

1. In Windows Explorer or MacOS Finder, select all of the courseware packages you want to include in the import.
2. In Windows, right-click the highlighted files and select **Send to > Compressed (zipped) folder** from the popup menu.
3. In MacOS, right-click (or ctrl-click) the highlighted files and select **Compress** from the shortcut menu.

To import the multiple course zip file into the LMS, go to **Manage Center > Learning > Import > Import content package**.

Click **Choose File** to select the aggregated content packages zip file to import, and then click **Next**. The course packages present in the zip file are summarised in the Batch Update Options page.



The course Title values are copied from the <manifest> element's **identifier** attribute in each package's manifest file.

Import Options

To import the course packages, leave the **Import courses** option selected.

You can, however, use this Import content package feature to delete LMS learning modules with Module IDs matching the **Title** (that is, manifest identifier) in each course content package.

> **Warning**
> Deleting previously imported learning modules also deletes any associated training records and may affect payment reporting.

Module ID Options

Leave the option **Use IDs specified in the course descriptions** selected to set the learning module IDs to the Title (manifest identifier) of the corresponding course content package.

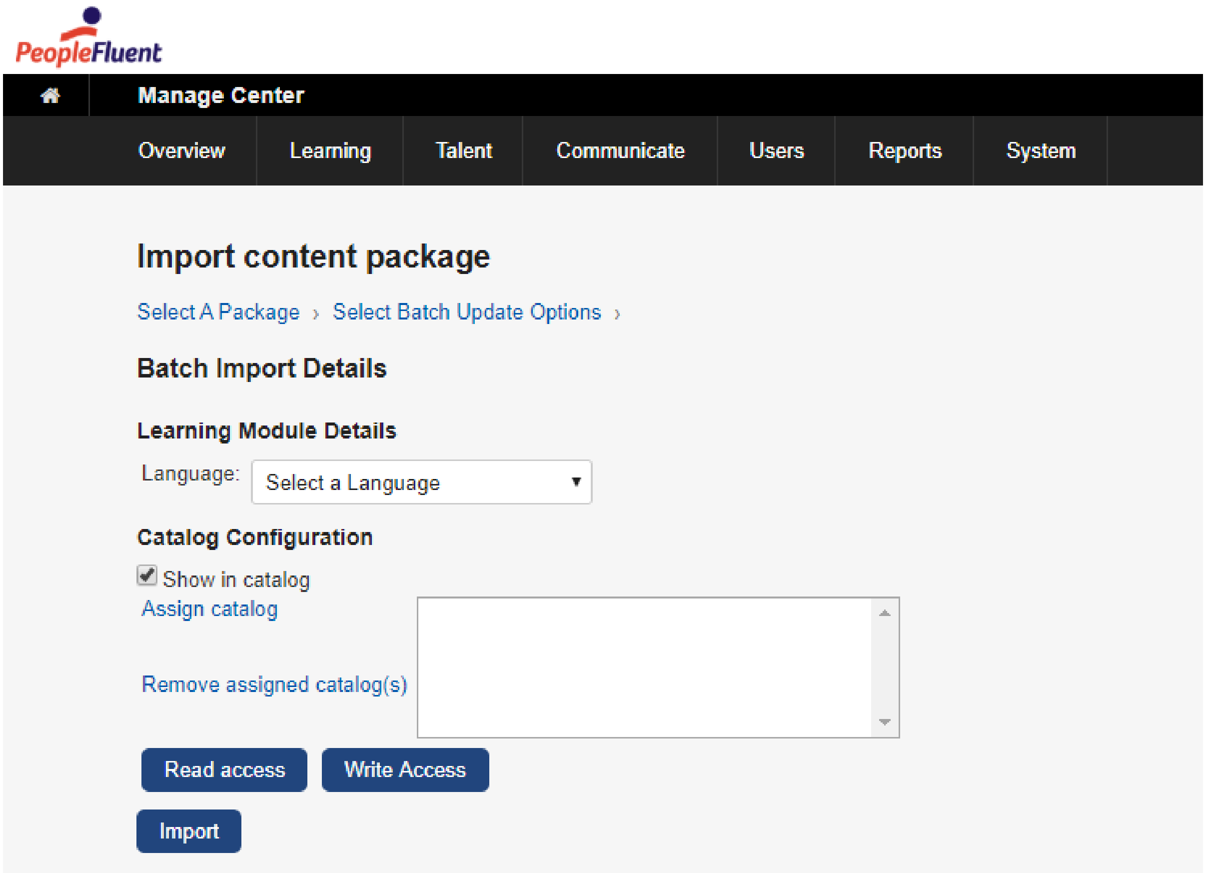
Select **Use the base file names of the source files** to set the imported courses learning module IDs to the file names of the content packages in the zip file.

> **Note**
> If you want to set module IDs to the file names of the content packages, the course content package file names cannot contain spaces.

You can, optionally, enter a **prefix** for the learning module IDs created from the imported content packages. Note that if you use the Import course package feature to delete courses that were previously imported with a prefix, you will need to enter the prefix to identify them for deletion.

Click **Next** to select the course language and catalog assignment(s).

Language and Catalog Options



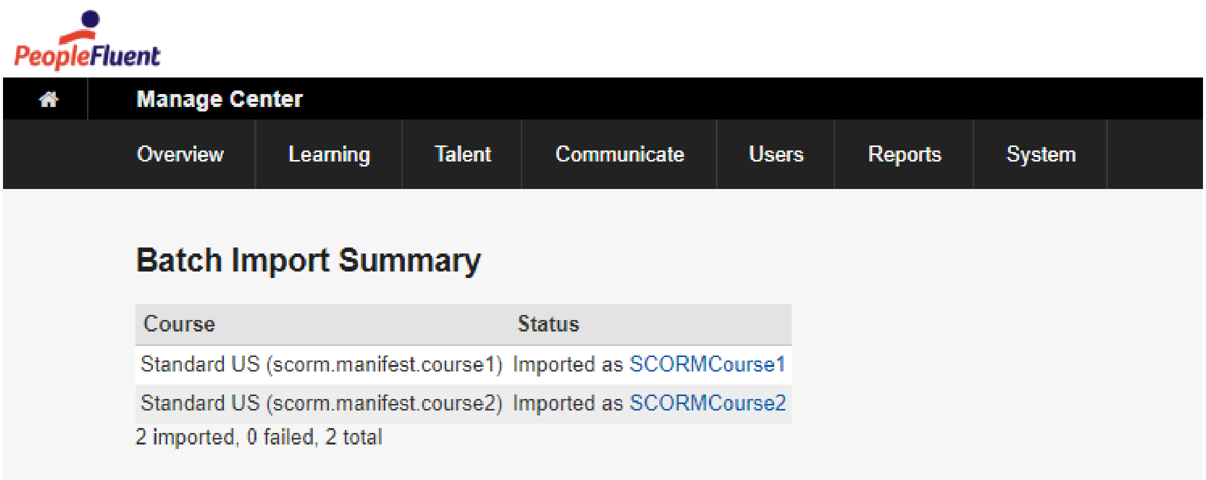
Select the language for the course modules from the drop-down list. If you are importing a package containing more than one course, you select the primary language from the drop-down list. For more information about multi-language configuration in the LMS, see EN600 NetDimensions LMS Multi-Language Content Support.

To show the course to learners when they search or browse catalogs, check the **Show in catalog** chec k box. If you leave this check box unselected, the course will not be shown to learners.

To assign the imported courses to one or more catalogs, click the **Assign catalog** link and select the catalog(s).

To remove the course from its assigned catalog(s), click the **Remove assigned catalog(s)** link.

Click the **Import** button to import the courses. When the import process has completed, the Batch Import Summary page lists the courses and their import status.



The Course column shows, for each course, the module title, taken from the <title> element of the first

<organization> element in the manifest file, and the unique manifest identifier.

The Status column shows, for each course, whether the course was imported successfully or not, and the module ID, which is derived from either the manifest identifier or the content package file name, depending on the module ID option you choose for import.

To edit a learning module in the Catalog Editor, click the module ID link in the Status column.

For more information about configuring learning modules, see Module Properties.

If any course packages fail to import, go to **System > Status and Logs > System Log**. The system log provides information that may help you, or PeopleFluent Customer Services, to resolve the issue. To locate errors related to batch imports, search the log for the module ID or 'com.netdimen.appl.course.update.BatchUpdater'.

Updating an existing course

You can import course revisions from the Catalog Editor Module Properties, or via the Import Content Package wizard.

To import course revisions in the Catalog Editor:

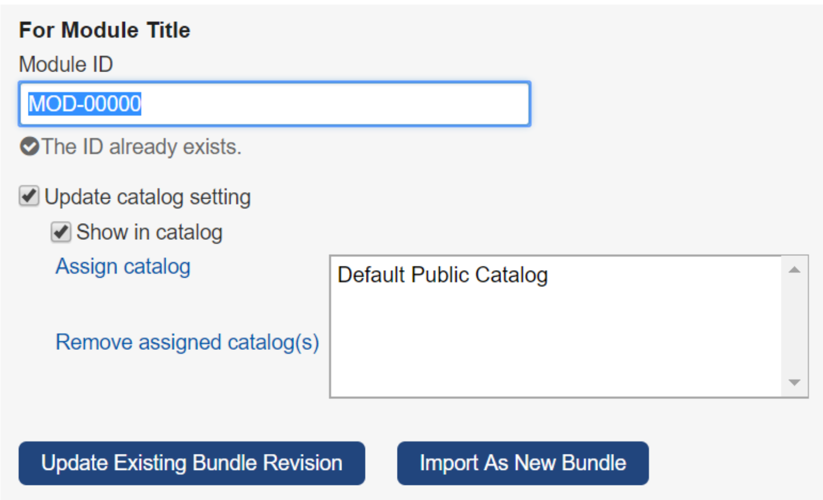
1. Go to **Manage Center > Learning > Learning Modules** and select the module to update. The module opens in the Catalog Editor.
2. Select Revisions and Launch Preview to import the course revision. The Import content package wizard opens within the Catalog Editor.

To open the Import content package wizard directly, go to **Manage Center > Learning > Import > Import content package**.

While the import process is the same, the import pages differ slightly in appearance. The examples shown in this document are those accessed via the Import content package menu item.

For more information about importing course revisions in the Catalog Editor (for both SCORM and AICC packages), see Revisions.

In the Select a Package page, click **Choose File** to select the content package to import, and then click **Next**.



To update an existing course, you must ensure the Module ID matches the existing course. This might be the default value imported from the manifest file, or it might be an ID specified by your organization.

The LMS automatically detects whether a Module ID matches an existing course.

Update catalog setting

To assign the imported course revision to one or more catalogs, check the **Update catalog setting** che ck box, and then click the **Assign catalog** link to select the catalog(s).

To remove the course from its assigned catalog(s), click the **Remove assigned catalog(s)** link.

To show the course to learners when they search or browse catalogs, check the **Show in catalog** chec k box. If you leave this check box unselected, the course will not be shown to learners.

Course Revision Language Options

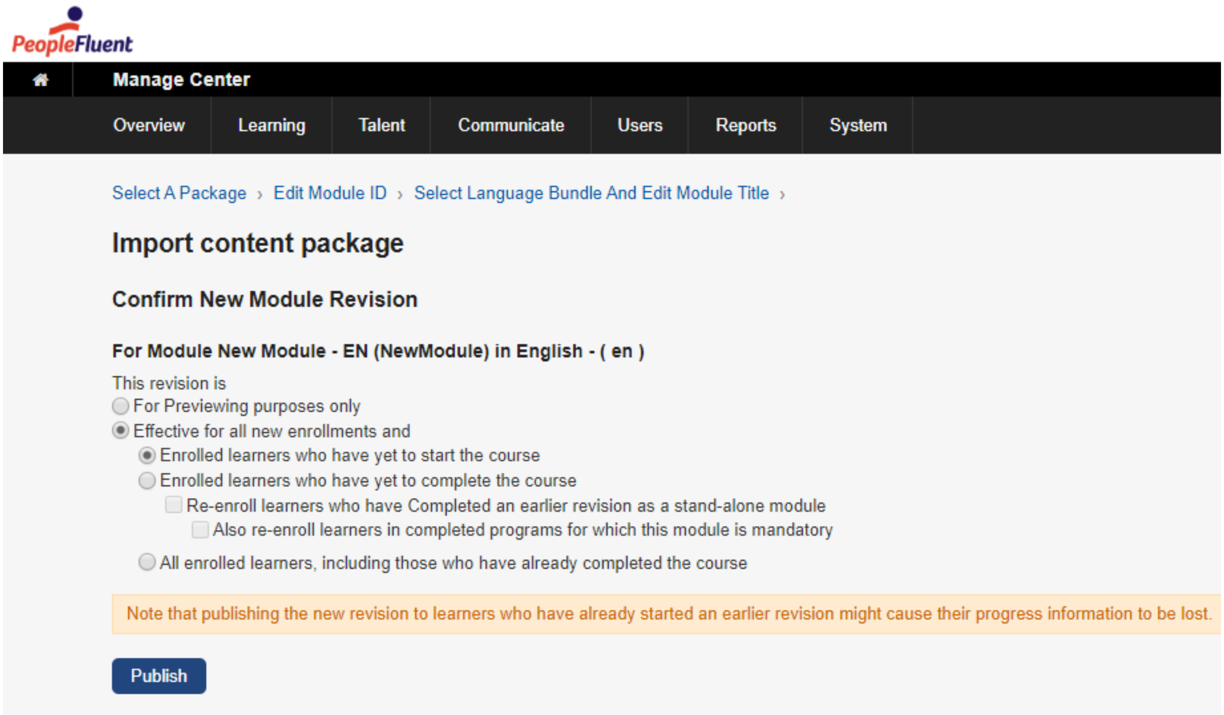
When you import course packages you select the language of the course you are creating or updating:

- If you're updating an existing course and the new version is the same language, click **Update Existing Bundle Revision**.
- If you're updating an existing course with a new version in a different language, click **Import As New Bundle**.

Select the language of the course you are updating from the Language drop-down list.

Change the module title, if required, and click **Next**.

Confirm New Module Revision



The default options for new module revisions are to make it available to learners who have not yet been enrolled and to learners who have been enrolled but have not yet started it.

For more information about the revision options, see Revisions.

Note
While not recommended for regulated environments, you can enable course administrators to publish new revisions to learners whose status in earlier revisions is 'Completed'. Learners reopening the completed course will launch the effective revision but it will still be marked as completed.

The option – **All enrolled learners, including those who have already completed the**

course – is provided only when it is enabled in System Configuration. To enable this option, go to **Manage Center > System > System Configuration** and select the check box labelled **Allo w administrators to publish new revisions to learners whose status in earlier revisions is Completed**.

Click the **Publish** button to update the learning module with the new revision.

Importing AICC Course Structures

You can import a single AICC-conformant course by uploading its four constituent files. You can also import one or more AICC courses by uploading them in a zip file.

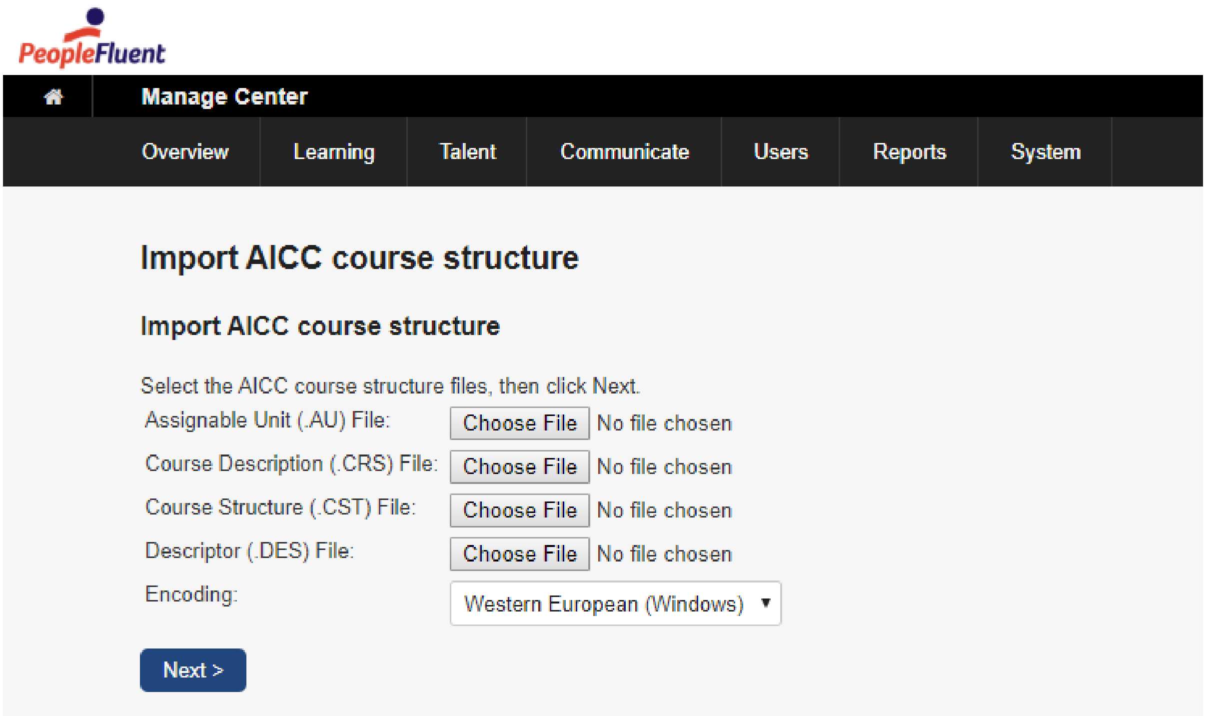
For each AICC course you want to import, ensure you have the following files:

- An assignable unit (.AU) file
- A course (.CRS) file
- A course structure (.CST) file
- A descriptor (.DES) file

The process for importing multiple AICC courses at once is the same as for SCORM courses. However, when you zip an AICC course for inclusion in a batch import, the four AICC files must have the same filename. Some tools and vendors provide extra files, but the LMS does not need them.

For instructions, see Importing Multiple Courses.

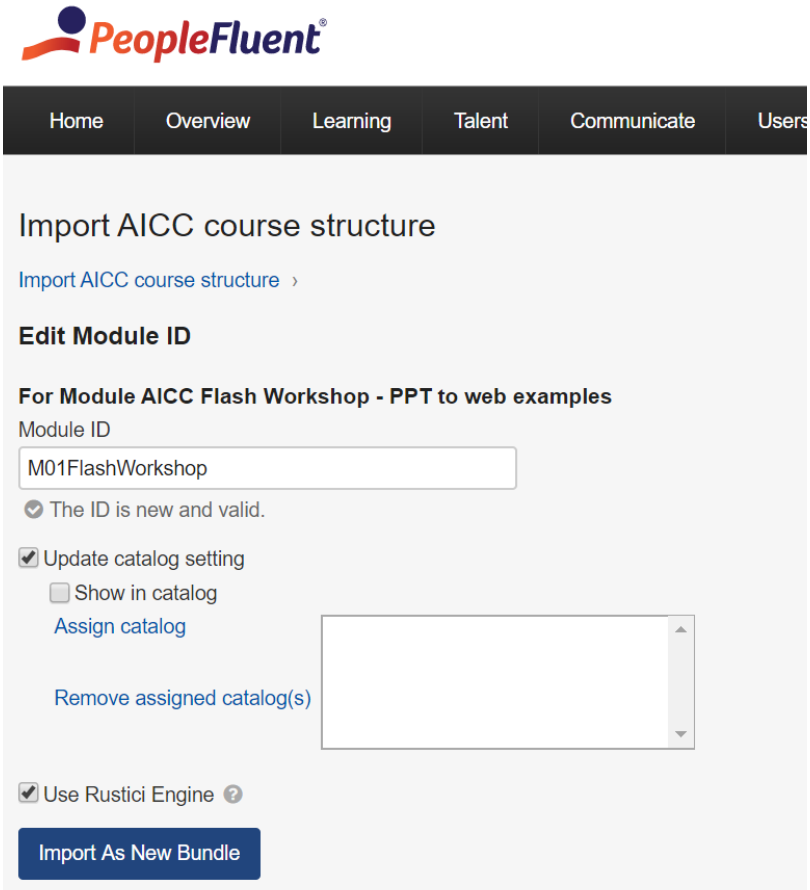
To import an individual AICC course, go to **Manage Center > Learning > Import > Import AICC course structure**.



Choose each AICC file and then select the appropriate character encoding from the Encoding drop-down list and then click **Next**.

Note
The AICC file character encoding depends on the tool used to author the courseware. If you do not know which character encoding to use, select the most likely based on the course language and geographic region. The next page shows the course title, which may include unexpected characters if the encoding is incorrect.

Edit Module ID and Catalog Options



To show the course to learners when they search or browse catalogs, check the **Show in catalog** chec k box. If you leave this check box unselected, the course will not be shown to learners.

To assign the imported courses to one or more catalogs, click the **Assign catalog** link and select the catalog(s).

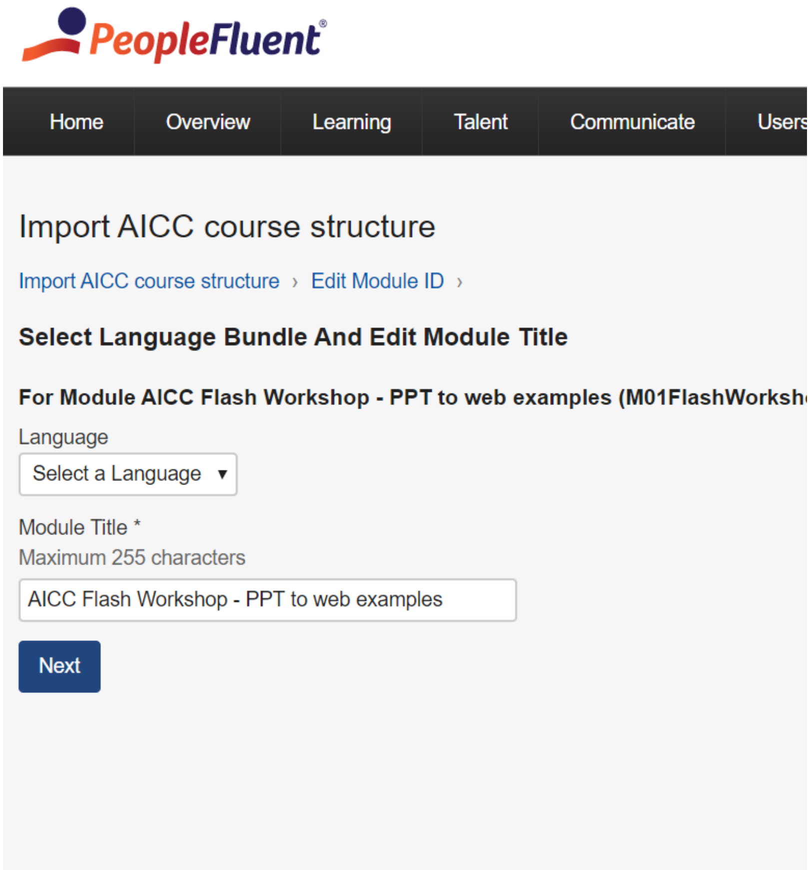
To remove the course from its assigned catalog(s), click the **Remove assigned catalog(s)** link.

Click the **Import As New Bundle** button to import a new AICC course structure.

If you are updating an existing AICC course structure, see Updating an existing course.

> **Note**
> The **Use Rustici Engine** option does not apply to AICC course structure import, and this check box may or may not be selected by default depending on your LMS configuration. Only imported SCORM courses can be registered in the Rustici Engine to track learner activity.

Language and Module Title Options



Select the language from the Language drop-down list.

Change the module title, if required, and click **Next** to complete the import process.

Configuring AICC Course Modules

After importing an AICC course you can configure it in the Catalog Editor as you would any other learning module.

If the learning module supports AICC data exchange and requires enrollment, you can select **AICC Assignable Unit** from the Launch interface drop-down list to enter AICC-specific options for data exchange with the learning module.

For more information about defining the launch properties for AICC courses, see Define Launch Properties.

Importing Courses with the Course CSV Loader

You can add, update and delete learning objects in bulk at module, session and class level via the Course CSV Loader. For more information, please refer to EN145 Data Import / Export.