



NetDimensions LMS

15.1

Learning Objects

An overview of Learning Object Administration in
NetDimensions LMS 15.1

Document Information

Document ID: EN15108

Document Title: NetDimensions LMS 15.1 - Learning Objects

Document Version: 1.0

Document Date: January 2020

This document may be revised from time to time.

Legal Notices

This document has been created for authorized licensees and subscribers of the software products and associated services of PeopleFluent. It contains the confidential and proprietary information of PeopleFluent and may be used solely in accordance with the agreement governing the use of the applicable software products and services. This document or any part thereof may not be reproduced, translated or retransmitted in any form without the written permission of PeopleFluent. The information in this document is subject to change without notice.

PeopleFluent disclaims all liability for the unauthorized use of the information contained in this document and makes no representations or warranties with respect to its accuracy or completeness. PeopleFluent disclaims all implied warranties including the implied warranties of merchantability and fitness for a particular purpose. PeopleFluent does not guarantee that its products or services or any sample content contained in its products and services will cause or enable Customer to comply with laws applicable to Customer. Users are responsible for compliance with all laws, rules, regulations, ordinances and codes in connection with the use of the applicable software products, including, without limitation, labor and employment laws in relevant jurisdictions. The PeopleFluent products and sample content should not be construed as legal advice.

Without limiting the generality of the foregoing, PeopleFluent may link to third-party web sites. Such third party links are for demonstration purposes only, and PeopleFluent makes no representations or warranties as to the functioning of such links or the accuracy or appropriateness of the content located on such third party sites. You are responsible for reviewing all content, including links to third-party web sites and any content that you elect to use, for accuracy and appropriateness, and compliance with applicable law.

Microsoft, Windows, and Internet Explorer are trademarks or registered trademarks of Microsoft Corporation in the United States and/or other countries. Oracle is registered trademarks of Oracle International Corporation. Adobe and Acrobat are registered trademarks of Adobe Systems Incorporated. All other names are used for identification purposes only and are trademarks or registered trademarks of their respective owners.

Website: peoplefluent.com

Copyright © 2020, PeopleFluent. All rights reserved.

Table of Contents

1. Introduction	5
2. Manage Learning Modules	6
3. Module Properties	9
3.1 Learning Module Details	9
3.2 Catalog Configuration	11
3.3 Audience	11
3.4 Collaboration Tools	12
3.5 Optional Module Attributes	12
3.6 Enter Cost Information	13
3.7 Enter Objectives	14
3.8 Enter References	14
3.9 Preview	17
3.10 Usage Statistics	18
3.11 Indicated Interest List	18
3.12 Associated Programs	21
3.13 Revisions	23
3.14 Virtual Archive	32
3.15 Module Security	32
3.16 Assigning Prerequisites	33
3.17 Assign Exams, Certifications, Evaluations	33
3.18 Enrollment Policy	34
3.19 Knowledge Center Setup Options	38
3.20 Define Launch Properties	42
3.21 E-mail Preferences Setup	49
3.22 Recommended Courses	51
3.23 Course Withdrawals	51
3.24 On-the-Job-Training	54
3.25 Course Checklists	55
4. Session Properties	65
4.1 Defining Session Properties	65
4.1.1 Facility Capacity for Enrollment Limits	69
4.2 Configuring a Class Schedule	73
4.3 Participant Management	76
4.3.1 Changing the Overall Status of the Participant	76
4.3.2 Sending E-mails	77
4.3.3 Participant Deadlines	78
4.3.4 Session Transfer	81
4.3.5 Enrollment Substitution at Catalog Editor Participants List	83

4.3.6 Re-enrolling to Alternative Sessions	84
4.4 Assigning Instructors	86
4.5 Auto Enrollment	86
4.6 Group Enrollment	87
4.7 Email Notifications	89
4.8 Prompt User to Select Session	92
4.9 Permissions on Adminstrating Sessions	94
4.10 Cloning Sessions	95
4.11 Training Plan Group Assignment	97
5. The Task Learning Type	99
6. Learning Programs	102
6.1 Enforcing Program Module Order	110
6.2 Failed and Deadline Expired Program Modules Handling	111
6.3 Progress Tracking Deadline	112
7. Recent History at Catalog Editor	115
8. Importing Courseware	117

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:\Vxyz.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: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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.

Catalog Editor

Session Properties
Module Properties

Behavioral Studies (MOD-1807)

1 Catalog Setup

→ 1.1 Define Module Properties
1.2 Enter cost information
1.3 Enter objectives
1.4 Enter references
1.5 Preview
1.6 View usage statistics
1.7 Indicated Interest List
1.8 Associated Programs
1.9 Virtual Archive
1.10 Checklist

2 Access control/enrollment control

2.1 Define Module Security
2.2 Assign prerequisites
2.3 Assign Recommended Course(s)
2.4 Assign exam/certification/evaluation
2.5 Define Enrollment Policy
2.6 Enrollment Restriction
2.7 E-mail Preferences Setup

3 Knowledge Center Setup

3.1 Setup Options

4 Launch setup

4.1 Define Launch Properties
4.2 Preview
4.3 Proxied Launch Package

Module Properties

Behavioral Studies (MOD-1807)

Learning Module Details

The following information is used to classify the course entry within the catalog. Additional screens for specifying the course description and other course details may be displayed by clicking one of the links on the left panel.

Module ID: MOD-1807

Title *: Behavioral Studies

Description:

Behavioral Studies

More Information Hyperlink:

Language: English

Vendor: TNP

Duration Comments:

Support Contact: yk.leung@netdimensions.com

☐ Display "Indicate Interest"

☒ With Preferred Date and Comment options
☐ With Comment option only

☒ Show on other resources tab instead of enrolled learning modules tab (tabbed interface only)

Catalog Configuration

Each learning object can appear in one or more catalogs, depending upon the options set below.

Visibility: ☐ Show in catalogs

Category: Unassigned

Subject: Unassigned

Assign catalog:

Image for Catalog Display

/preview/nd/fresco/images/stock/sample8.jpg

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

The screenshot shows the 'Catalog Configuration' form. At the top, a green header bar contains the title 'Catalog Configuration'. Below it, a paragraph states: 'Each learning object can appear in one or more catalogs, depending upon the options set below.' The form fields are as follows: 'Visibility' with a checkbox 'Show in catalogs' (callout 1); 'Category:' with a dropdown menu 'Unassigned' (callout 2); 'Subject:' with a dropdown menu 'Default Subject' (callout 2); 'Image for Catalog Display:' with a text input field and two buttons (callout 3); and 'Assign catalog' with a large text area (callout 4).

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.

The screenshot shows the 'Who should take this?' section of the form. It has a dark header bar with the title 'Who should take this?'. Below it, a paragraph states: 'Enter the information below to specify the target audience for this module.' There are three 'Audience:' labels followed by empty text input fields.

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.

Collaboration Tools

Select and configure the collaboration tools that are available for this learning module.

☐ Wiki

☐ Wiki space name: no title [Manage wiki space...](#)

☒ Wiki URL:

Wiki links display: ☐ Knowledge Center (only enrolled users)
☒ Knowledge Center and catalog page (publicly available)

☐ Chat Room:

☐ Forum Category:

☒ Peer review/comments

Optional Module Attributes

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

Optional Module Attribute(s)

Optional module attributes, if configured, may be assigned to this module.

Level:

Comment:

Max_Enrollees:

With_Exam:

☐

Additional_Comments:

Selector:

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:

The screenshot shows the 'Catalog Editor' window with the 'Cost Information' tab selected. The left sidebar lists navigation options under 'English1 (77777)', with '1.2 Enter cost information' highlighted. The main content area is titled 'Cost Information' and contains a sub-section 'Cost/Enrollment Information'. Below this, there is explanatory text: 'The following cost attributes are used to determine how to put entries into the participant account when they enroll for a learning module/program. It is recommended that a cost be assigned, even if participants are not actually charged, as this helps with budget and ROI planning.' The form includes the following fields: 'Charge Procedure' (a dropdown menu set to 'Charged per Registration'), 'Charged Cost Center' (an empty text box), 'Currency Payment' (a dropdown menu set to 'United States of America, Dollars'), 'Cost' (a text box containing '0.00'), and 'Price Info' (a large empty text box).

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.

The screenshot shows the 'Optional Payment Items' screen. At the top, there is a header 'Optional Payment Items' and a sub-header 'Configure items that can be optionally purchased by learners when buying a course.' Below this, there is a section titled 'Optional Payment Item Types' with a question mark icon. There are two items listed, each with a checkbox, a dropdown menu, and two text boxes for 'Cost' and 'Token Cost'. The first item is 'ARCH001' with a dropdown menu set to 'Per Night of Course', a 'Cost' field containing '0.0', and a 'Token Cost' field containing '0.0'. The second item is '001' with a dropdown menu set to 'Per Night of Course', a 'Cost' field containing '0.0', and a 'Token Cost' field containing '0.0'.

Enter Objectives

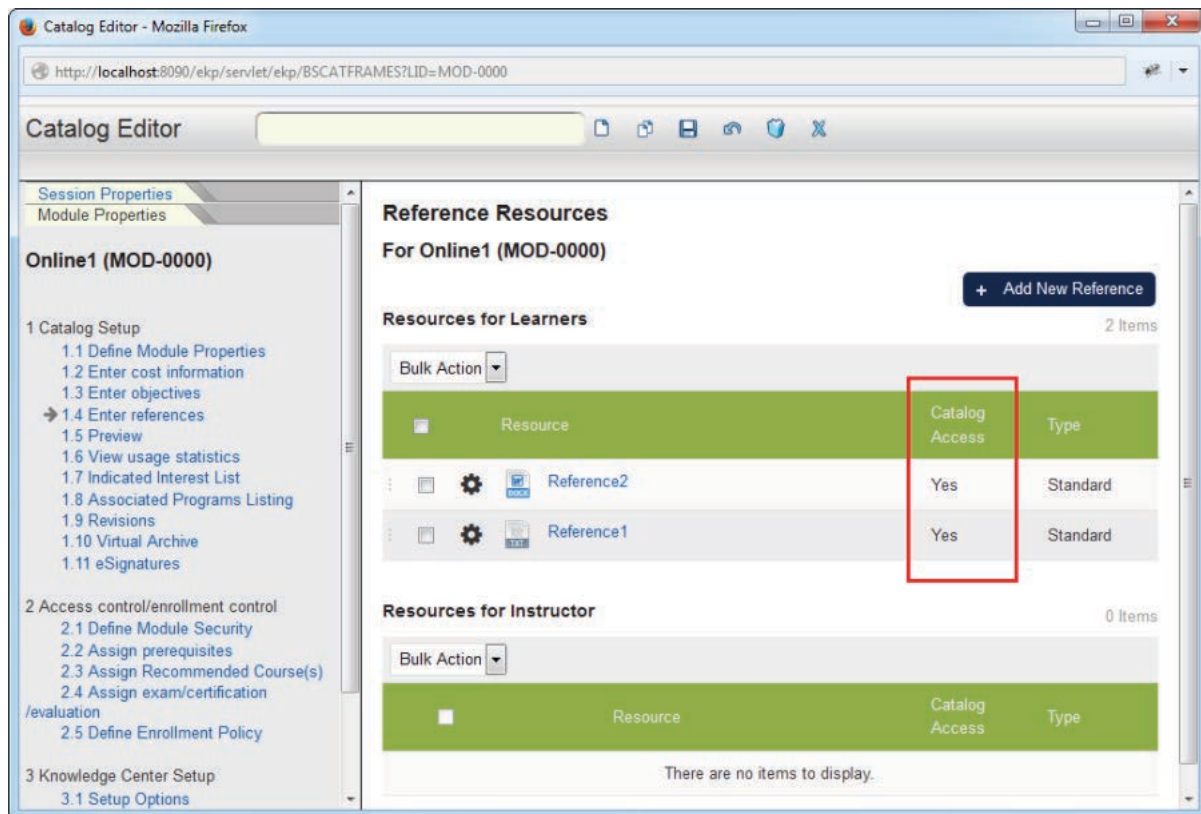
To specify objectives, click on **Enter Objectives** in the Catalog Editor. The *Objectives* screen appears.

The screenshot shows the 'Catalog Editor' window. On the left is a sidebar with a tree view. Under 'Basic MS Office Word Tutorial (BASIC_MS_OFFICE_WORD_TUTORIAL)', the '1.3 Enter Objectives' item is selected and highlighted. The main area on the right is titled 'Objectives' and contains a text area with the instruction: 'You can add additional objectives to be displayed in the catalog. You may find it useful to embed HTML commands in this field to aid formatting.' Below this are nine text input fields labeled 'Objective #1:' through 'Objective #9:'. At the bottom of these fields is a link that says 'more objectives'. The top of the window has a title bar with standard icons for file operations.

- 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

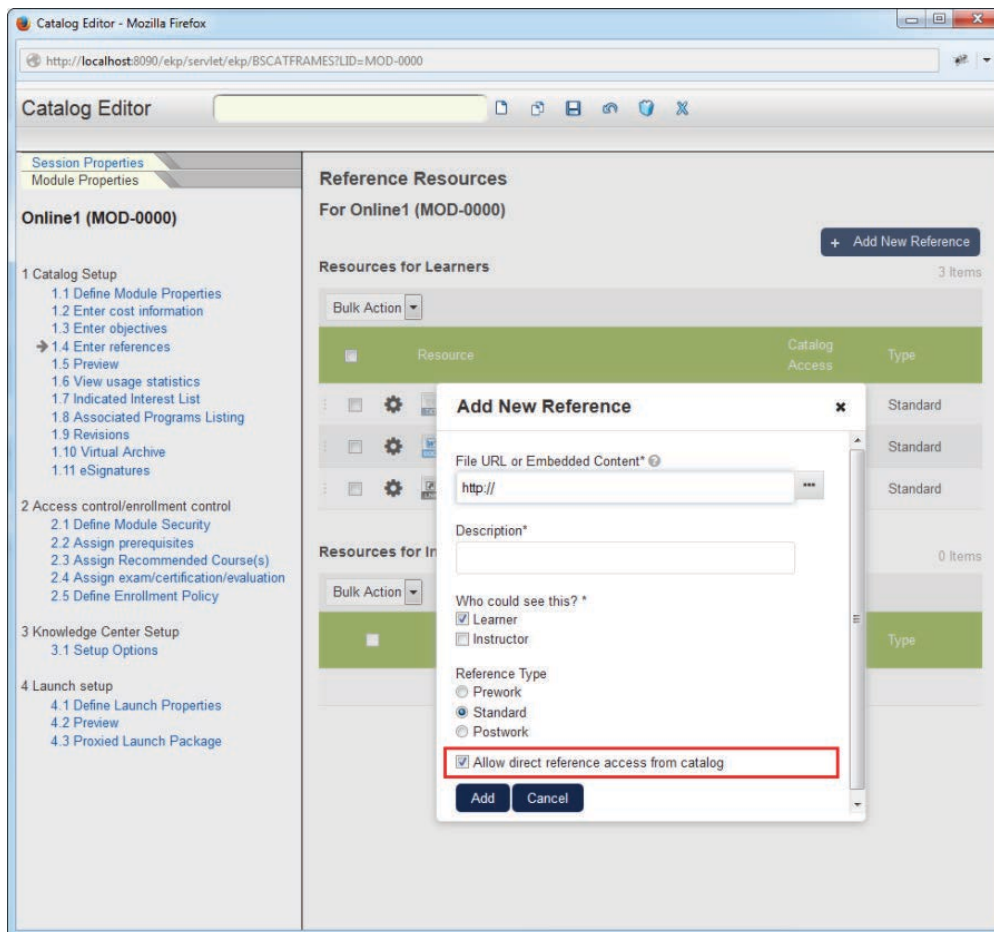
1. To enter reference resources, click **Enter References** on the left. Click + **Add New Reference**



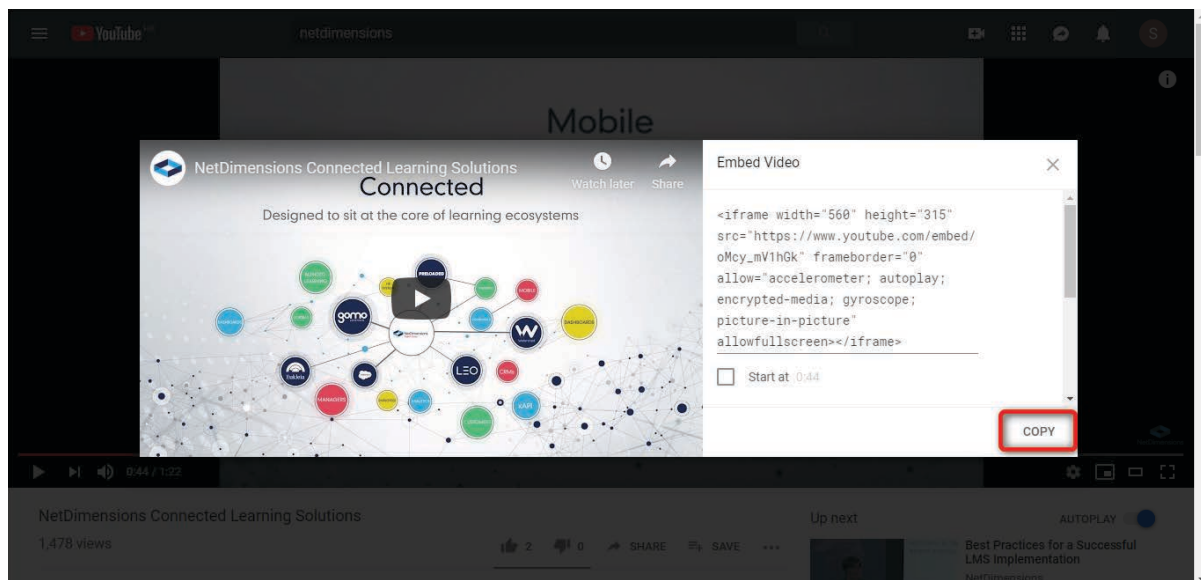
2. Fills in the necessary information in the overlay. The "Allow direct reference access from catalog" setting specifies whether that particular reference can be directly accessed from the catalog. Catalog Access of the Reference can also be enabled / disabled under the cog next to that reference resource.

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

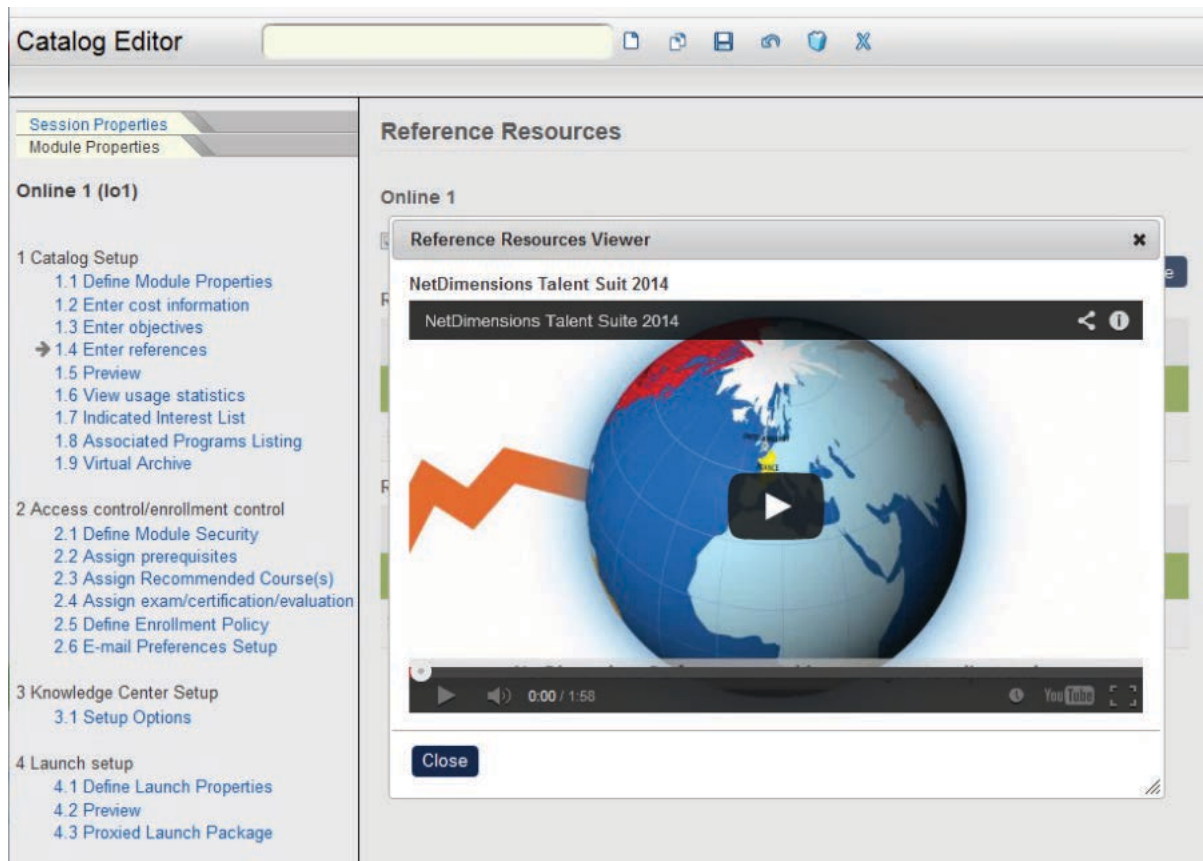


4. To preview the resource, either click the resource link or mouse over the cog icon next to the item and select "Preview". Embedded content can be previewed as a popup overlay; other resource file type will be shown in a new window.

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.

Average Rating N/A
[Peer Comments](#)

Module	Basic MS Office Word Tutorial	
Learning Type	Online	
Subject	Unassigned	
Language	English	
Brief Description	This course will teach the students the basic functionalities and features of MS Word.	
Objectives		
More Information		
Wiki Link		
Click here to indicate your interest in taking this course... 		

Session	Session Cost	Event Status
Online	List Price: 2.00 Tokens/Credits	Active

[Close](#) [to top of page](#)

Usage Statistics

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

Catalog Editor

Listing
 Session Properties
 Module Properties

Basic MS Office Word Tutorial
 (BASIC_MS_OFFICE_WORD_TUTORIAL)

1 Catalog Setup

- 1.1 Define Module Properties
- 1.2 Enter Cost Information
- 1.3 Enter Objectives
- 1.4 Enter References
- 1.5 Preview
- 1.6 View Usage Statistics**
- 1.7 Indicated Interest List
- 1.8 Associated Programs Listing
- 1.9 Revisions
- 1.10 Virtual Archive

2 Access Control/Enrollment Control

- 2.1 Define Module Security
- 2.2 Assign Prerequisites
- 2.3 Assign Exam/Certification/Evaluation
- 2.4 Define Enrollment Policy

3 Knowledge Center Setup

- 3.1 Setup Options

4 Navigation Setup

- 4.1 Navigation Setup



View Usage Statistics



Basic MS Office Word Tutorial

View Usage Statistics

You can view the enrollment, withdrawn, completion, knowledge center access statistics of this Learning Program/Module here.

Statistics are tabulated daily. So, statistics for today will not be available until tomorrow. If the system is restarted today, some data maybe lost.

Start Date: (not specified)  

End Date: (not specified)   [Submit](#)

Date	# Enrollments	# Withdrawals	# Completions	# Knowledge Center Hits	Activity % (#Active / #Enrolled)
Aug 4, 2011	2	0	0	0	0
Total	2	0	0	0	N/A

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:

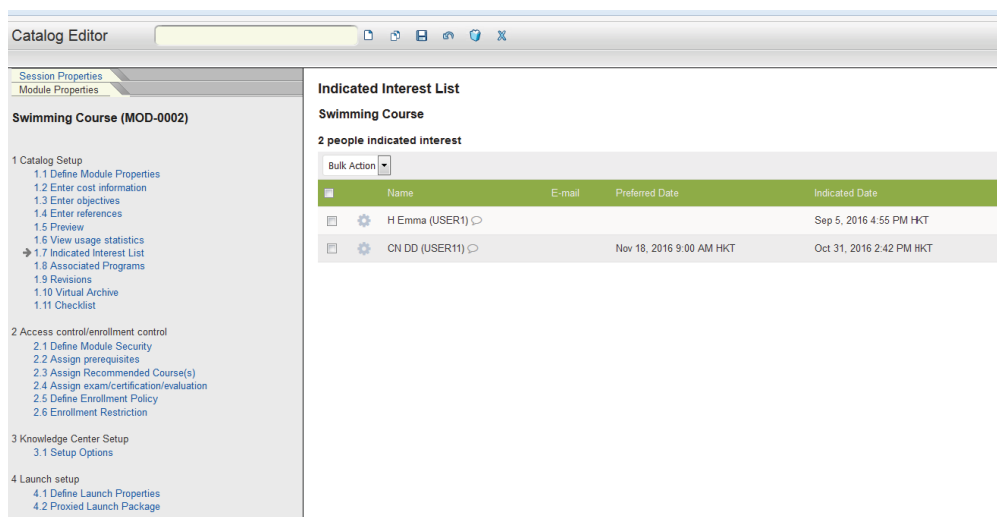
The screenshot shows the 'Catalog Editor' window with the 'Module Properties' tab selected. Under 'Course 1', the 'Learning Module Details' section is expanded. The 'Display "Indicate Interest"' checkbox is checked and circled in red. Below it, the 'With Preferred Date and Comment options' radio button is selected. The 'With Comment option only' radio button is also visible but not selected.

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:

The screenshot shows the 'Indicate Interest in Class 6' page. It features three 'Preferred Date' fields, each with a date picker and a time selector. Below these is a 'Comment (max. 255 characters)' text area. At the bottom are 'Save' and 'Back' buttons.

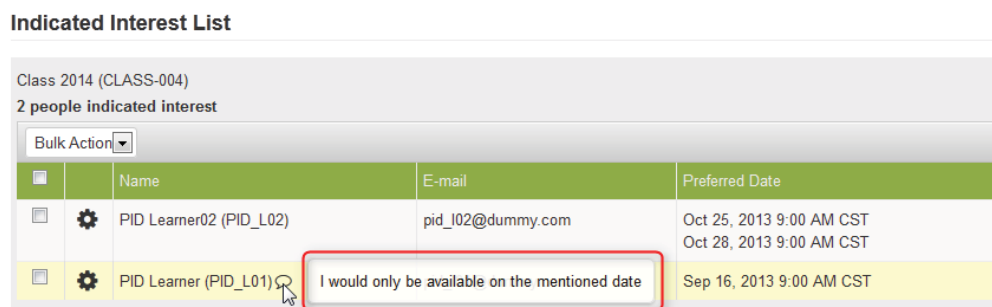
If *With Comment option only* is selected, the preferred date fields will not be presented to the learner.

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

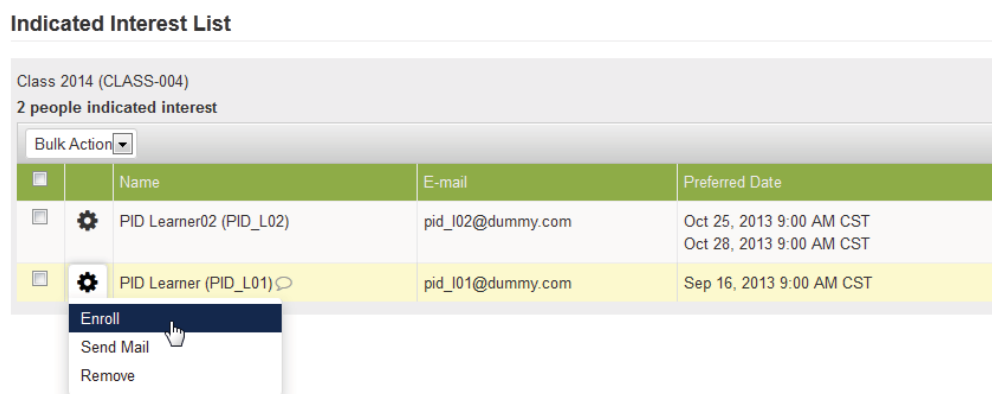


From here, administrators can

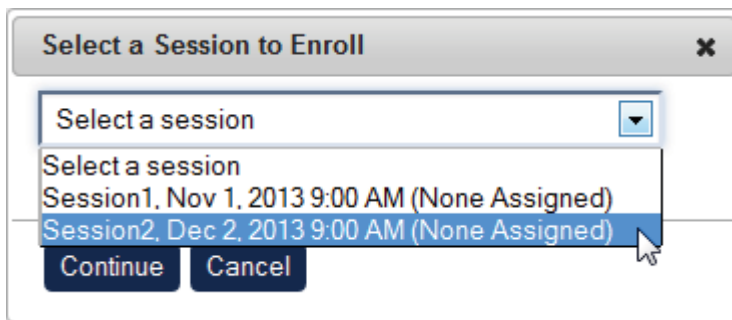
- View learner name with email, preferred dates, and when each learner indicated interest
- View the comment provided by each learner (via mouseover)



- E-mail learners (individual or in bulk)



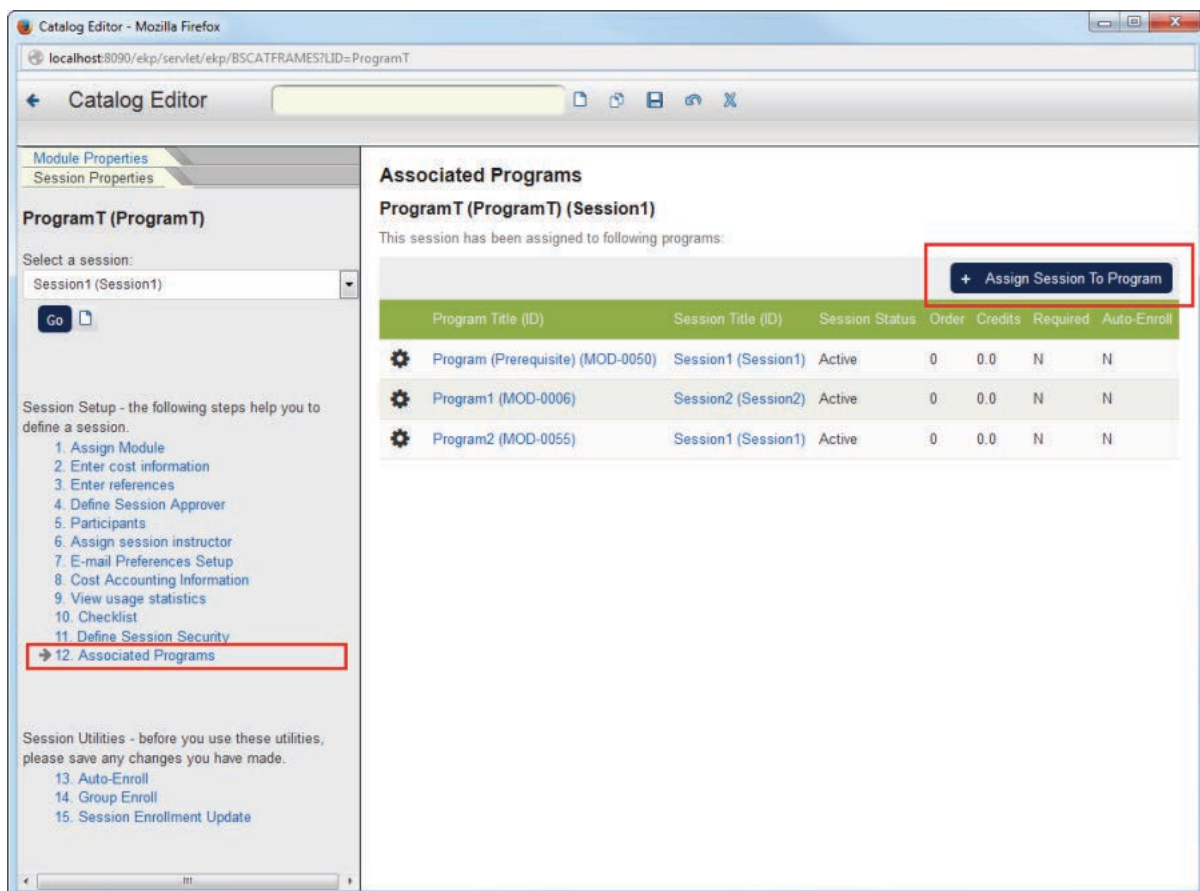
- Enroll learners onto a session (individual or in bulk)



- 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).

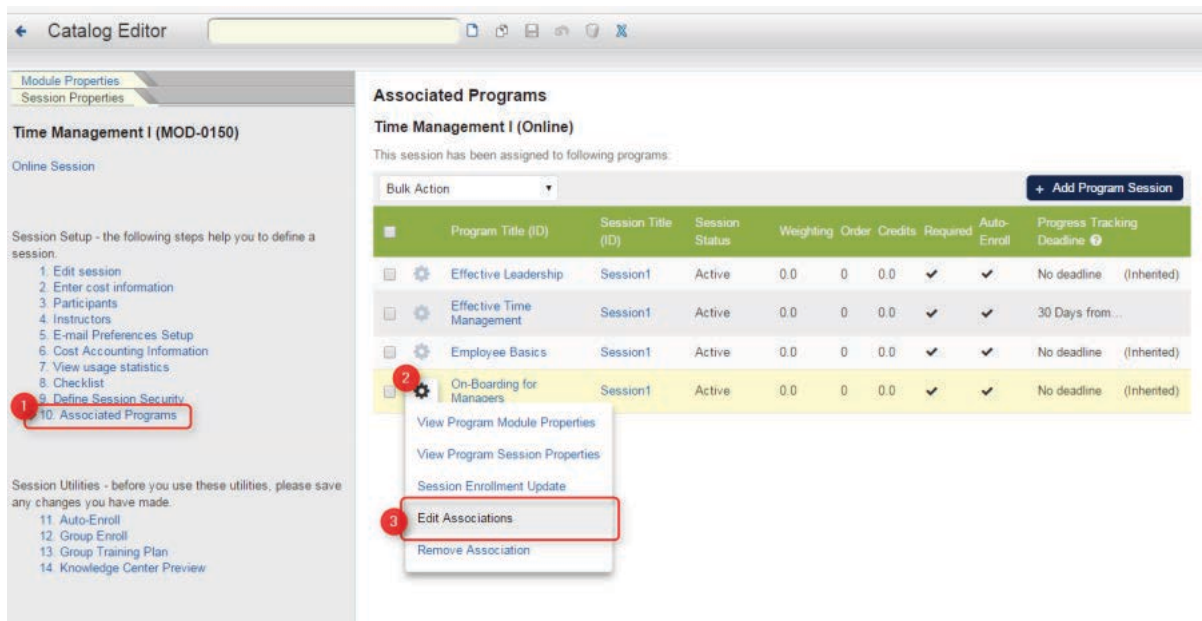
Associated Programs

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

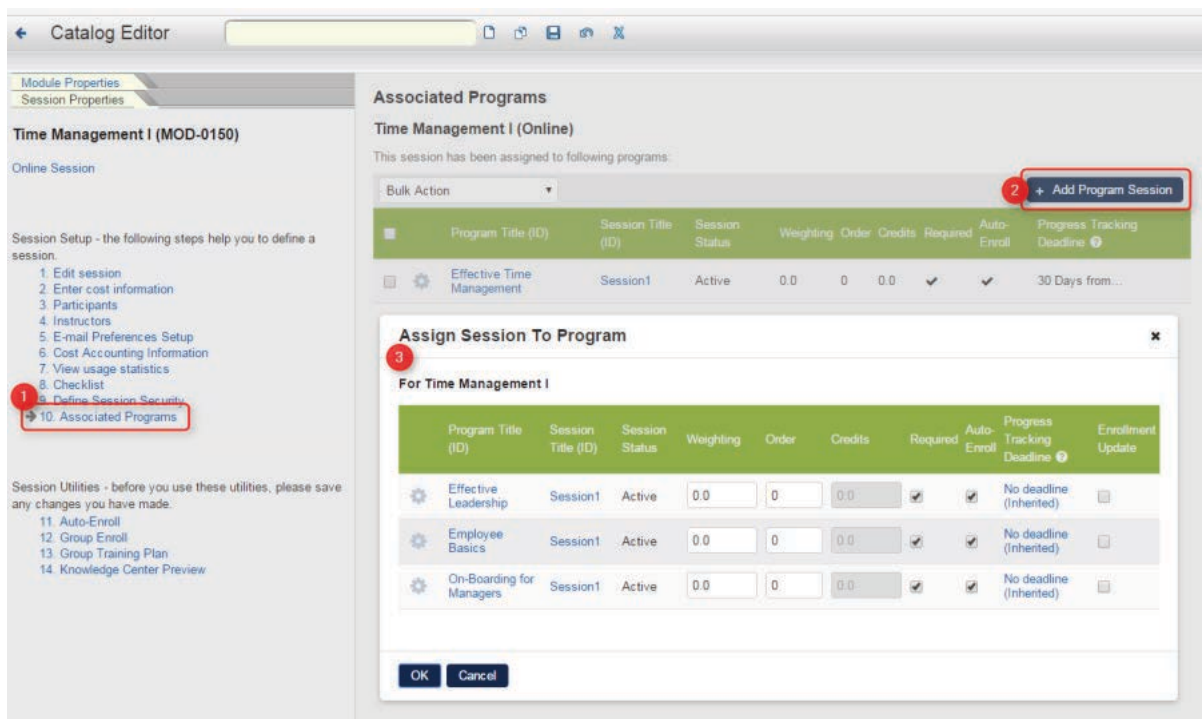


For each associated program session, you can

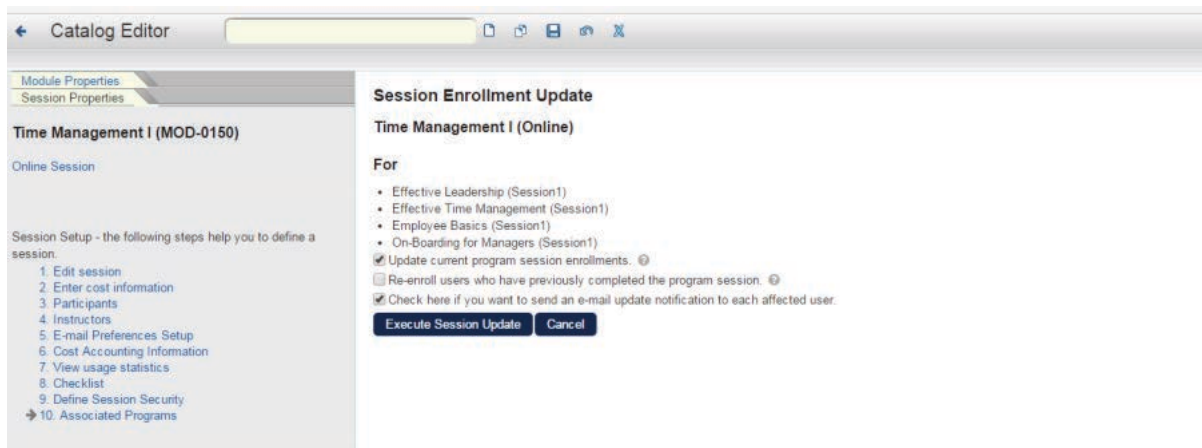
- View Program Module Properties
- View Program Session Properties
- Session Enrollment Update (also available as bulk action)
- Edit Association (also available as bulk action)
- Remove Association



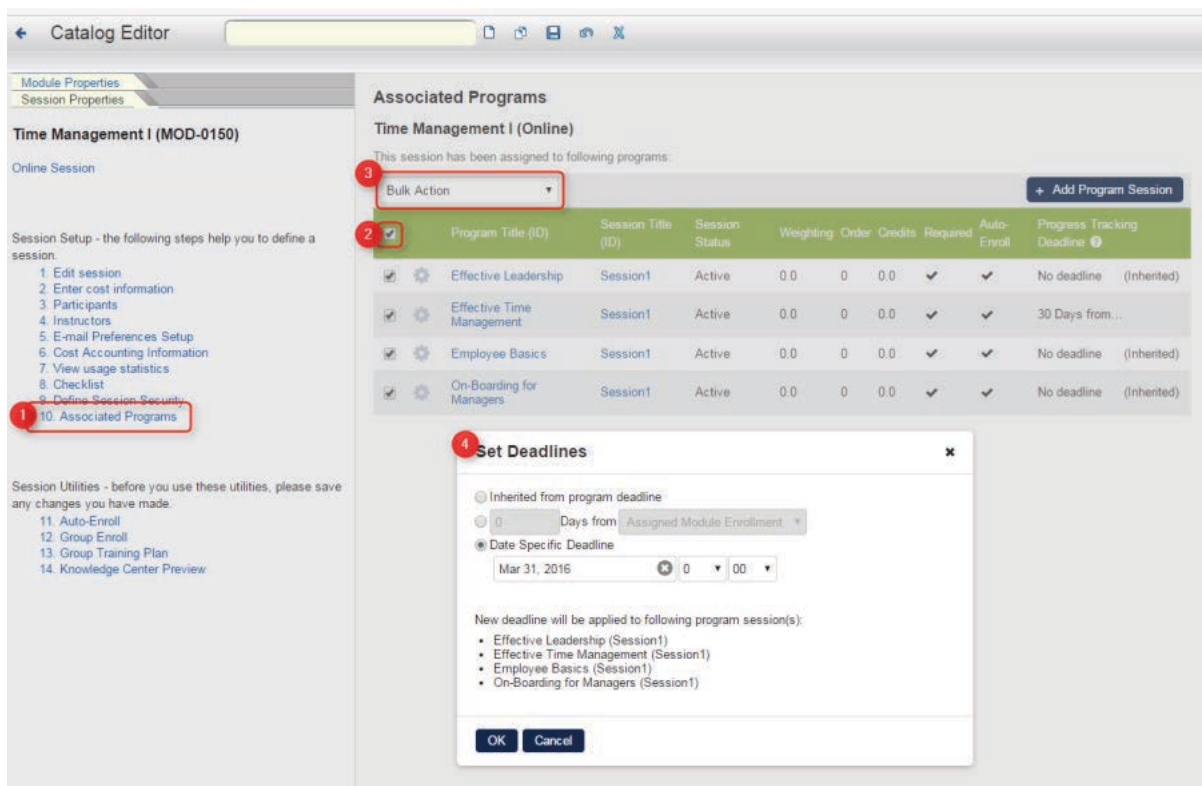
At the session level, "+ Add to Program Session" allows you to assign the session to one or more program sessions, including specifying program module settings like "Required" and "Auto-Enroll":



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.

The screenshot shows the 'Revisions' page in the Catalog Editor. On the left, a sidebar lists navigation options under 'Session Properties' and 'Module Properties'. The main content area is titled 'Introduction to Public Speaking (MOD-0013)' and features a '+ Import New Revision' button. Below this is a table with two columns: 'Revision' and 'Last Edited'.

Revision	Last Edited
1 (Effective)	Jun 24, 2014 3:27 PM
0	Jun 24, 2014 3:26 PM

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

The screenshot shows the 'Select Content Package' dialog box in the Catalog Editor. The dialog box is titled 'Select Content Package' and contains instructions: 'Select a SCORM, AICC or IMS content package, a zip file containing one or more SCORM or IMS content packages, or a zip file containing one or more sets of AICC course structure files. (Each set of AICC course structure files must consist of four files with the same base file name, and the file name extensions .au, .crs, .cst and .des respectively.)'. Below the instructions, there is a 'Package:' label and a file selection area with a 'Choose File' button and 'No file chosen' text. A 'Next >' button is also present.

For importing AICC Course Structure

Catalog Editor

Listing...
Session Properties
Module Properties

English 102 (ENG002)

1 Catalog Setup
 1.1 Define Module Properties
 1.2 Enter Cost Information
 1.3 Enter Objectives
 1.4 Enter References
 1.5 Preview
 1.6 View Usage Statistics
 1.7 Indicated Interest List
 1.8 Associated Programs Listing
 → 1.9 Revisions
 1.10 Virtual Archive

2 Access Control/Enrollment Control
 2.1 Define Module Security
 2.2 Assign Prerequisites
 2.3 Assign Exam/Certification/Evaluation
 2.4 Define Enrollment Policy

3 Knowledge Center Setup
 3.1 Setup Options

4 Launch Setup
 4.1 Define Launch Properties
 4.2 Preview
 4.3 Proxied Launch Package

Select Content Package

English 102

Select Course Structure Files

Select the AICC course structure files, then click Next.

Assignable Unit (AU) File: captivate.au

Course Description (CRS) File: captivate.crs

Course Structure (CST) File: captivate.cst

Descriptor (DES) File: captivate.des

Encoding:

For importing Resources

Catalog Editor

Listing...
Session Properties
Module Properties

English 102 (ENG002)

1 Catalog Setup
 1.1 Define Module Properties
 1.2 Enter Cost Information
 1.3 Enter Objectives
 1.4 Enter References
 1.5 Preview
 1.6 View Usage Statistics
 1.7 Indicated Interest List
 1.8 Associated Programs Listing
 → 1.9 Revisions
 1.10 Virtual Archive

2 Access Control/Enrollment Control
 2.1 Define Module Security
 2.2 Assign Prerequisites
 2.3 Assign Exam/Certification/Evaluation
 2.4 Define Enrollment Policy

3 Knowledge Center Setup
 3.1 Setup Options

4 Launch Setup
 4.1 Define Launch Properties
 4.2 Preview
 4.3 Proxied Launch Package

Select Content Package

English 102

Enter Resource Details

Run-Time Environment
 The run-time environment determines how NetDimensions Talent Suite communicates with the resource.

☒ This resource has no built-in support for run-time communication

☐ This resource communicates using a JavaScript API (appropriate for SCORM courses and courses that support the AICC API Binding)

☐ This resource communicates using an HTTP-based protocol (appropriate for courses that support the AICC HACP Binding)

☐ This resource is an exam created using the Exam Editor

Address
 This is the web address (URL) of the resource.
 The Web Address is the URL invoked when a user launches this resource. You may use the Select button to choose the resource launch file from the File Repository. Alternatively, you may enter any valid web address, with or without parameters. For example, an absolute URL such as "http://mysite.com/page1.htm" for resources that are launched remotely from a separate content web server, or, a relative URL such as "/exp/nd/fresco/courses/page1.htm?UID=anna" for resources that are hosted on the same web server as NetDimensions Talent Suite.

Web Address:

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

Select content package

Introduction to Public Speaking (MOD-0013)

Confirm new course revision

There is already a course with ID "MOD-0013". Do you want to create a new revision of the existing course?

This revision is

- ☒ For Previewing purposes only
- ☐ Effective for all new enrollments and
 - ☐ Enrolled learners who have yet to start the course
 - ☐ Enrolled learners who have yet to complete the course
 - ☐ Re-enroll learners who have Completed an earlier revision as a stand-alone module
 - ☐ Also re-enroll learners in completed programs for which this module is mandatory
 - ☐ All enrolled learners, including those who have already completed the course

Note that publishing the new revision to learners who have already started an earlier revision might cause their progress information to be lost.

[< Back](#) [Publish](#)

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.

Catalog Editor

Select Content Package

ENGLISH 101 - A

Course Revision Created

Revision 1 of the course ENGLISH 101 - A was 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:

Select content package

Introduction to Public Speaking (MOD-0013)

Confirm new course revision

There is already a course with ID "MOD-0013". Do you want to create a new revision of the existing course?

This revision is

☒ For Previewing purposes only

☐ Effective for all new enrollments and

- ☐ Enrolled learners who have yet to start the course
- ☐ Enrolled learners who have yet to complete the course
 - ☐ Re-enroll learners who have Completed an earlier revision as a stand-alone module
 - ☐ Also re-enroll learners in completed programs for which this module is mandatory
- ☐ All enrolled learners, including those who have already completed the course

Note that publishing the new revision to learners who have already started an earlier revision might cause their progress information to be lost.

[< Back](#) [Publish](#)

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.

Introduction to Public Speaking (MOD-0013)

[+ Import New Revision](#)

Revision	Last Edited
1 (Preview)	Jun 24, 2014 3:27 PM
0 (Effective)	Jun 24, 2014 3:26 PM

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:

Revisions

Introduction to Public Speaking (MOD-0013)

[+ Import New Revision](#)

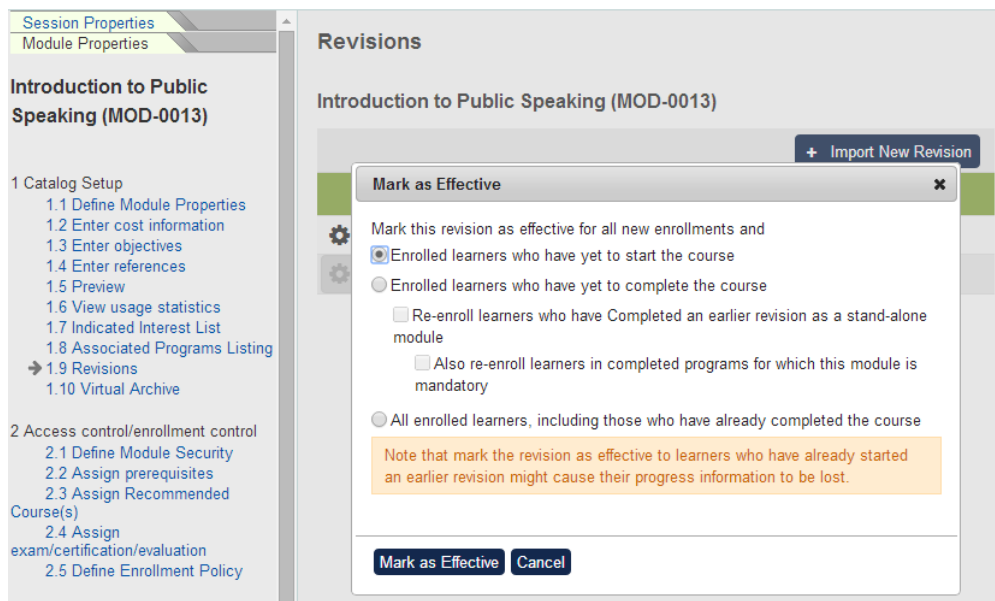
Revision	Last Edited
1 (Preview)	Jun 24, 2014 3:27 PM
0 (Effective)	Jun 24, 2014 3:26 PM

Mark as Effective

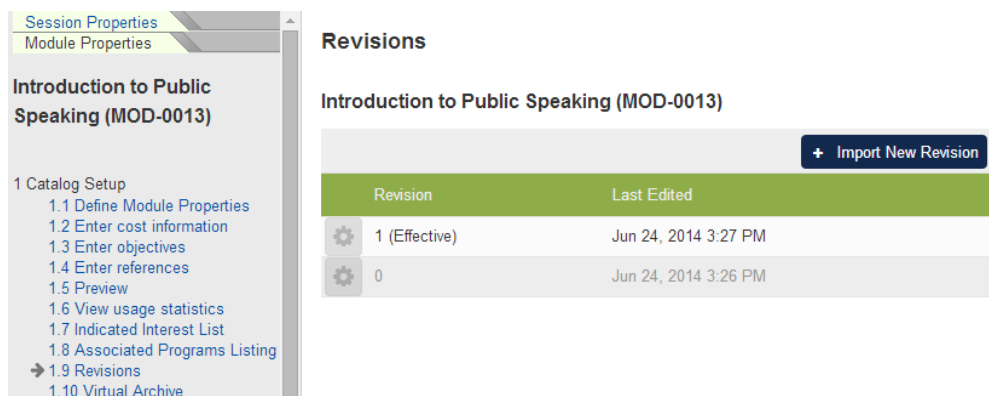
Mark as Approved

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.

Presentation Skills

Revision		Last Edited
 2 (Preview)		Jul 2, 2014 3:38 PM
 1 (Approved)		Jul 2, 2014 3:38 PM
 0 (Effective)		Jul 2, 2014 3:37 PM

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

Presentation Skills

Revision		Last Edited
 2 (Preview)		Jul 2, 2014 3:38 PM
 1 (Approved)		Jul 2, 2014 3:38 PM
Mark as Effective		Jul 2, 2014 3:37 PM

Approved revision can only be "Mark as Effective".

Action allows you to specify enrollment or withdrawal processing for the selected users.

Action

Group Enrollment ▼

Enroll selected users to the following active revision:

- ☒ Effective
- ☐ Approved

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.

When performing a program enrollment, enrollment linking may be done for currently active (WAITLISTED, NOT STARTED, IN PROCESS, PENDING) modules that are a part of this program, or also previously completed (COMPLETE, FINISHED USING) modules.

Share/credit enrollment for

- ☐ In Process modules only
- ☐ In Process modules and Completed modules
- ☒ In Process modules in any revision and Completed modules on effective/approved revision

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

Mandatory (for Training)	Title	Learning ID	Revision	Valid for	Target Level
<input type="checkbox"/>	Presentation Skills	MOD-0000	Any Any Effective	<input type="text"/> Day(s)	<input type="text"/>

☐ After a new revision of a mandatory learning module requiring the effective revision is published, allow a grace period of Day(s) before revoking the competency.

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)

Catalog Editor

Session Properties
Module Properties

Java online (cpsec_219)

1 Catalog Setup

- 1.1 Define Module Properties
- 1.2 Enter cost information
- 1.3 Enter objectives
- 1.4 Enter references
- 1.5 Preview
- 1.6 View usage statistics
- 1.7 Indicated Interest List
- 1.8 Associated Programs Listing
- 1.9 Revisions
- 1.10 Virtual Archive

2 Access control/enrollment control

- 2.1 Define Module Security
- 2.2 Assign prerequisites
- 2.3 Assign Recommended Course(s)
- 2.4 Assign exam/certification/evaluation
- 2.5 Define Enrollment Policy

3 Knowledge Center Setup

- 3.1 Setup Options

4 Launch setup

- 4.1 Define Launch Properties
- 4.2 Preview
- 4.3 Proxied Launch Package

javascript:void(0);

Revisions

Java online

+ Import New Revision

Revision	Last Edited
1 (Preview)	Jun 24, 2014 3:26 PM
0 (Effective)	Jun 23, 2014 2:15 PM

Mark as Effective

Mark as Approved

Click on 'Mark as Approved'

Catalog Editor

Session Properties
Module Properties

Java online (cpsec_219)

1 Catalog Setup

- 1.1 Define Module Properties
- 1.2 Enter cost information
- 1.3 Enter objectives
- 1.4 Enter references
- 1.5 Preview
- 1.6 View usage statistics
- 1.7 Indicated Interest List
- 1.8 Associated Programs Listing
- 1.9 Revisions
- 1.10 Virtual Archive

2 Access control/enrollment control

- 2.1 Define Module Security
- 2.2 Assign prerequisites
- 2.3 Assign Recommended Course(s)
- 2.4 Assign exam/certification/evaluation
- 2.5 Define Enrollment Policy

3 Knowledge Center Setup

- 3.1 Setup Options

4 Launch setup

- 4.1 Define Launch Properties
- 4.2 Preview
- 4.3 Proxied Launch Package

Revisions

Java online

+ Import New Revision

Revision	Last Edited
1 (Preview)	Jun 24, 2014 3:26 PM
0 (Effective)	Jun 23, 2014 2:15 PM

Mark as Approved

Approved Revision will be applied to learners who are enrolled on but have yet to complete the previous Approved Revision.

Learners who complete or have completed an earlier version will automatically be re-enrolled onto the Approved Revision.

Mark as Approved Cancel

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

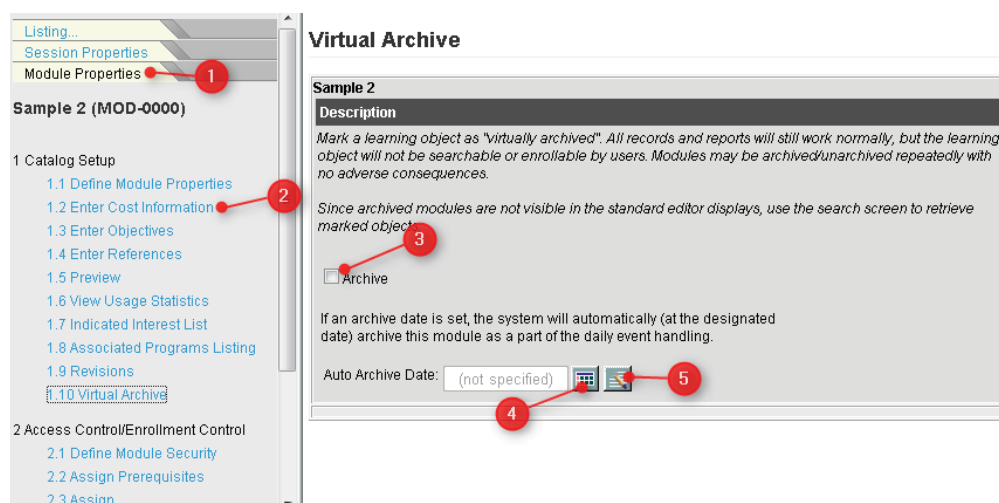
Please note that when an approved revision is marked as effective, learners who have completed the approved and now effective revision will not be re-enrolled again.

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:

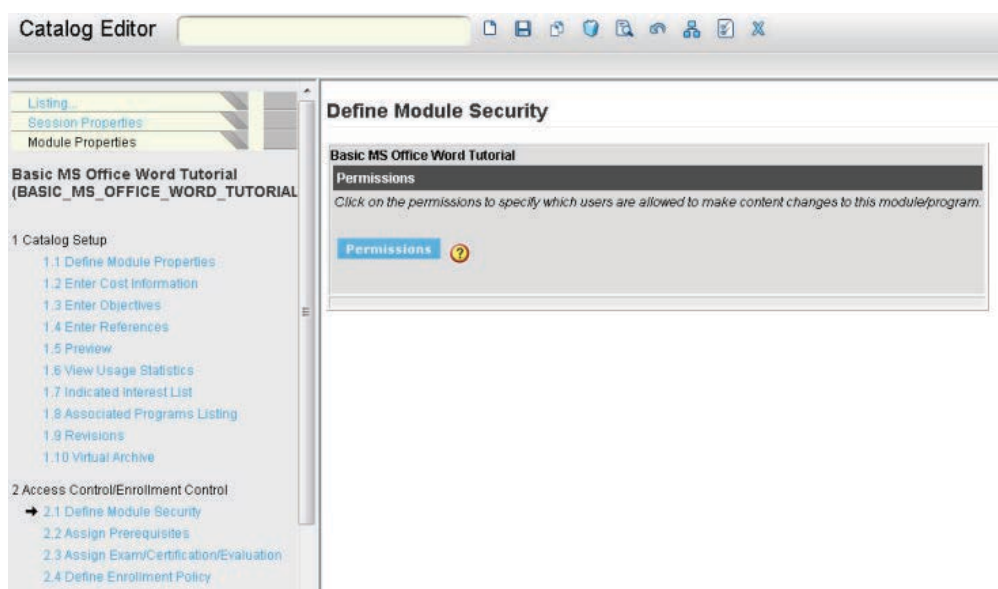


1. Click the Module Properties tab.
2. Select the Enter Cost Information link.
3. To archive the selected module, tick the Archive box.
4. A module can be archived automatically by setting the archived date. Click the Calendar button to select the date on when to execute the archive process.
5. Use this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

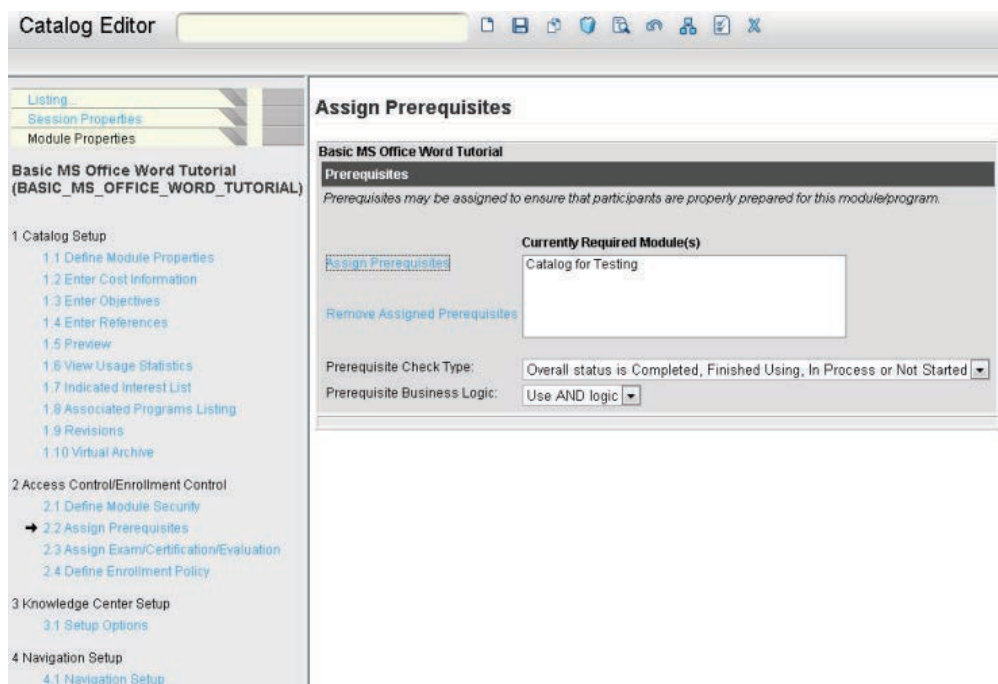
Module Security

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 *Define 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:

Catalog Editor

Listing...
Session Properties
Module Properties

Basic MS Office Word Tutorial (BASIC_MS_OFFICE_WORD_TUTORIAL)

1 Catalog Setup

- 1.1 Define Module Properties
- 1.2 Enter Cost Information
- 1.3 Enter Objectives
- 1.4 Enter References
- 1.5 Preview
- 1.6 View Usage Statistics
- 1.7 Indicated Interest List
- 1.8 Associated Programs Listing
- 1.9 Revisions
- 1.10 Virtual Archive

2 Access Control/Enrollment Control

- 2.1 Define Module Security
- 2.2 Assign Prerequisites
- 2.3 Assign Exam/Certification/Evaluation
- 2.4 Define Enrollment Policy

3 Knowledge Center Setup

- 3.1 Setup Options

4 Navigation Setup

- 4.1 Navigation Setup

Assigned Relationships

Basic MS Office Word Tutorial

Exam Assignment

The list below indicates those exams which currently are assigned to this learning module/program. You can select from the drop-down box to add or remove an assignment. Added exams automatically appear in the exam list.

Assign Exam(s)

Remove Assigned Exam(s)

Passing an exam marks this module as completed: No

☐ Exams are Mandatory

Certification Assignment

Select an available certification to associate with this learning object. Certificates are typically awarded on completion of the course or, if there is an associated certification exam, on passing the exam.

Certification

Evaluation

Select a post-program evaluation for use with this learning module/program. The evaluations listed below are tests that belong to the Program Evaluations pool.

Evaluation:

☐ Mandatory Evaluation

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	<p>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:</p> <ul style="list-style-type: none"> • The transcript status is "Not Started", "In Process", or "Session Selection Needed" • There are alternative sessions satisfying ALL of the following: <ul style="list-style-type: none"> • 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 <p>A reviewer with the "Session Transfer" and "Review Records/Transcript" Access Controls can also carry out Session Transfers regardless of this setting.</p>
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	<p>Specify whether another enrollment policy can be assigned to individual Organization / User Group to take precedence over any configured policy for the course.</p> <p>Then select the Organization / User Group and the Policy Name. Click Add organization / User Group Policy to add a new input row if required.</p>
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.

Catalog Editor

Session Properties
Module Properties

Behavioral Analysis (ba)

1 Catalog Setup

- 1.1 Define Module Properties
- 1.2 Enter cost information
- 1.3 Enter objectives
- 1.4 Enter references
- 1.5 Preview
- 1.6 View usage statistics
- 1.7 Indicated Interest List
- 1.8 Associated Programs
- 1.9 Virtual Archive
- 1.10 Checklist

2 Access control/enrollment control

- 2.1 Define Module Security
- 2.2 Assign prerequisites
- 2.3 Assign Recommended Course(s)
- 2.4 Assign exam/certification/evaluation
- 2.5 Define Enrollment Policy
- 2.6 Enrollment Restriction
- 2.7 E-mail Preferences Setup

3 Knowledge Center Setup

- 3.1 Setup Options

4 Launch setup

- 4.1 Define Launch Properties
- 4.2 Preview
- 4.3 Proxied Launch Package

Define Enrollment Policy

Behavioral Analysis (ba)

Enrollment Security

Enrollment security allows you to control which users are allowed to enroll for this module/program. If public access is checked below, all users can enroll in this module. Otherwise, the user is checked for membership in any one of the following access control lists.

- ☒ This module/program currently allows public access.
- ☒ Allow self-enrollment
- ☒ Allow user to WITHDRAW
 - ☐ Prompt user for reason for the withdrawal
- ☒ Allow user to mark Completed (Self-Asserted)
- ☐ Allow status changes to be made at any time (e.g., ignore standard business rules)
- ☐ Allow session transfer ?

When a learner has one or more previous enrollments with status COMPLETED, COMPLETED SELF-ASSERTED, WAIVER/EXEMPT, PASSED, or FAILED

- ☐ Disallow re-enrollment
- ☒ Allow re-enrollment after day(s)

Currently Allowed Organization(s)

Select organization constraint(s)

Currently Allowed User(s)

Assign user constraint(s)

Remove assigned user(s)

Enrollment Policy

Select the desired enrollment policy here. If none is selected, the system default will be used for enrollment processing. Note that for a learning program, enrollment confirmation e-mails will not be sent for each module in the program unless they are configured on the e-mail preferences setup screen in each module. Withdrawal e-mails for each module in the program will be sent unless the module's enrollment policy does not include a withdrawal e-mail.

Policy Name: ...

An enrollment policy can be assigned for individual organization/user group, and this takes precedence over any

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.

Catalog Editor

Define Enrollment Policy

Basic MS Office Word Tutorial

Enrollment Security

Enrollment Security allows you to control which users are allowed to enroll for this module/program. If public access is checked below, all users can enroll in this module. Otherwise, the user is checked for membership in any one of the following access control lists.

☒ This module/program currently allows public access

☒ Allow user to WITHDRAW

☐ Prompt user for reason for the withdrawal

☒ Allow user to mark COMPLETED

☐ Allow status changes to be made at any time (e.g. ignore standard business rules)

If the allow re-enrollment checkbox is checked then a user having one or more previous enrollments with overall status COMPLETED or FINISH USING is allowed to enroll in this course again.

☐ Disallow Re-enrollment

☒ Allow re-enrollment

In some cases, a course that might have been taken by a student previously will need to be re-taken after a period of time. The history expiration window is used to specify the number of days after which the student may re-enroll. For example, if the value is set to "30" then a student who took this course more than 30 days ago will need to re-take this course.

History Expiration Window: 0 day(s)

Select Organization Constraint(s)

Currently Allowed Organization(s)

Assign User constraint(s)

Currently Allowed user(s)

Remove Assigned User(s)

Enrollment Policy

Select the desired Enrollment Policy here. If none is selected, the system default will be used for enrollment processing. Note that for a Learning Program, enrollment confirmation emails will not be sent for each module in the program unless they are configured on the E-mail Preferences Setup screen in each module. Withdrawal emails for each module in the program will be sent unless the module's enrollment policy does not include a withdrawal email.

Policy Name: **DEFAULT TWO STEP ENROLLMENT POLICY**

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

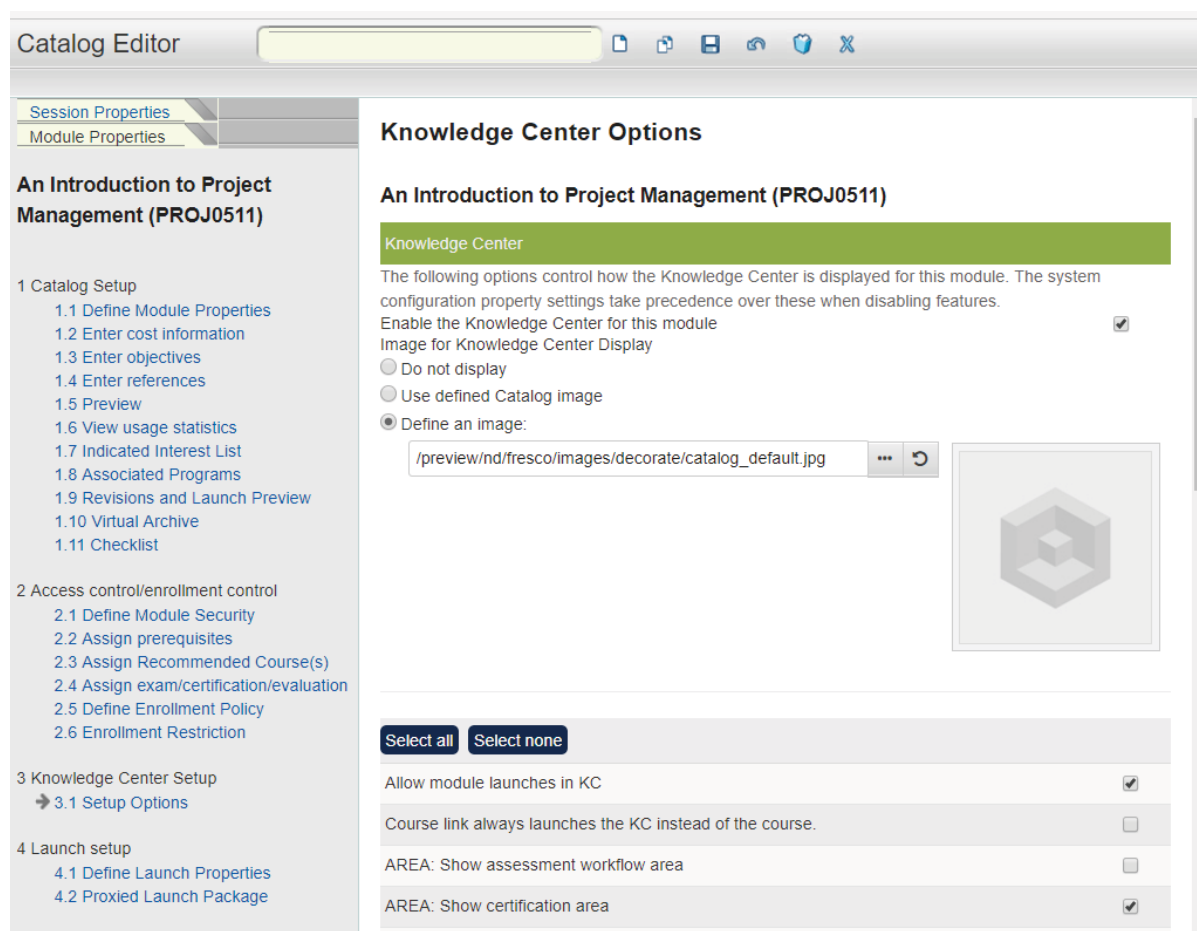
User: Policy: (none configured)
Course: Policy: A
Org Precedence Indicator: True
Result: Policy A is used
Reason: Because there is no org policy configured, the course policy is used. This is the case for all existing policy handling (before using Org Policies), and represents the most common approval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

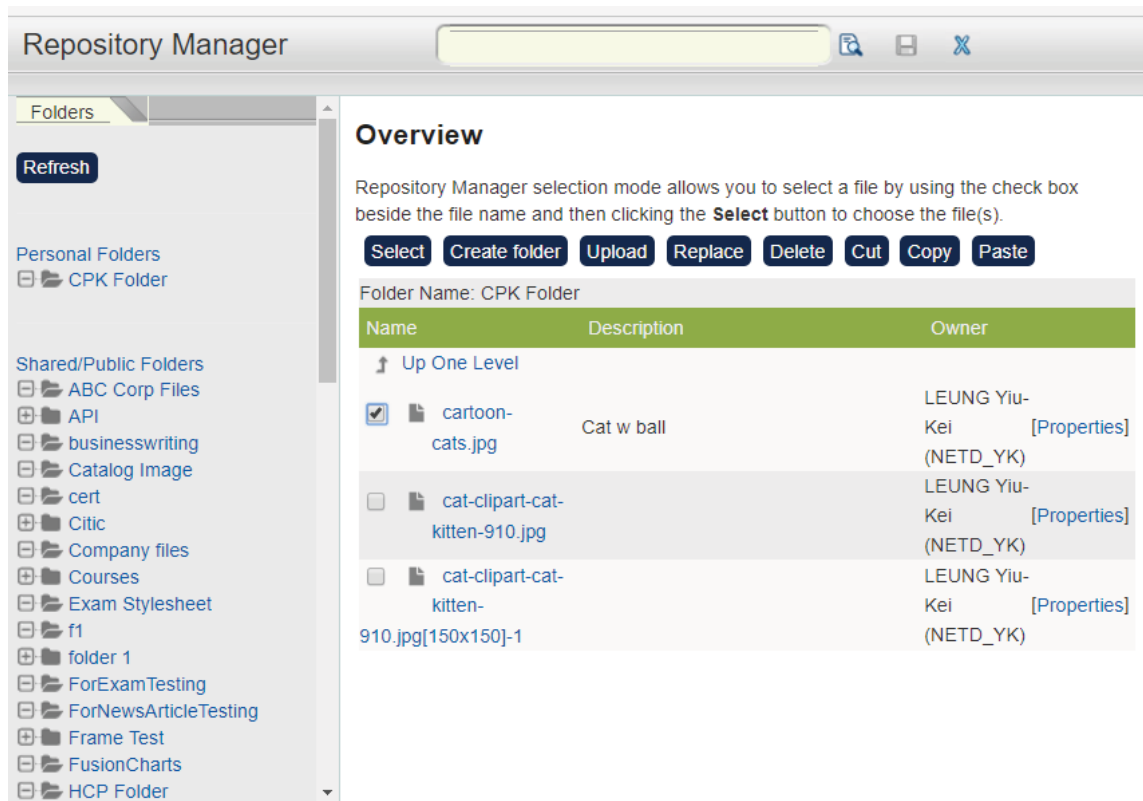


Under **Image for Knowledge Center Display**, there are three radio buttons (only one option can be selected) to determine whether to display a picture in the Knowledge Center:

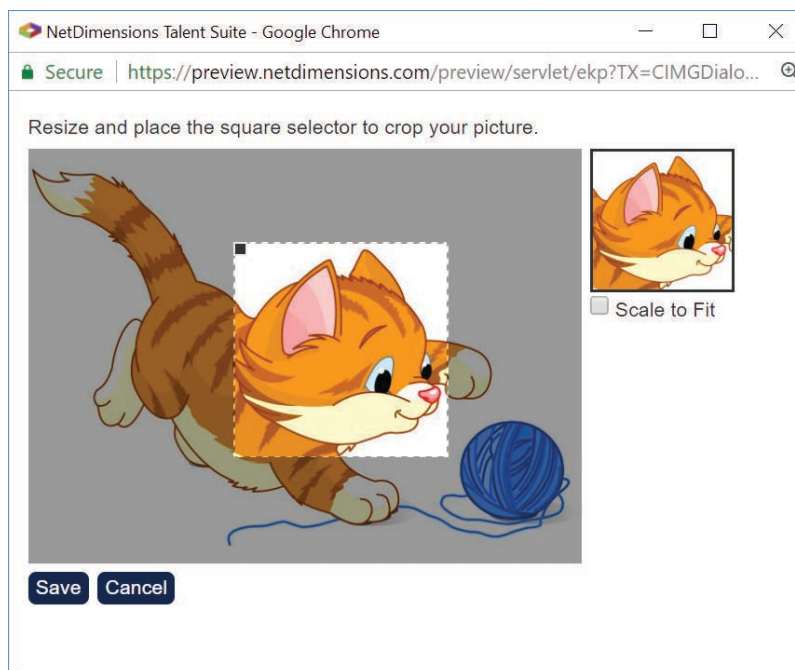
- Do not display - No image will be displayed for the KC. Once selected, the image preview on the right will be hidden.
- Use defined Catalog image - Use the Module's Image for Catalog Display defined in **1.1 Define Module Properties** under **1 Catalog Setup**. The Image will be displayed on the right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



- 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 editing can be previewed on the right. Press **Save** to finish editing.



- 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.

Catalog Editor

Learning Object(s) has/have not been saved:ENG_001

Web Launch Interface Specifications

English 101

Web Interface

By default, learning modules are launched using a generic HTML initialization. If AICC Tracking is enabled, extra parameter information may be exchanged with the learning module. This option is only meaningful if your learning module supports AICC data exchange and the course requires enrollment (e.g. no Direct Catalog Launch).

Launch Interface: Generic web launch

Allow Direct Launch (NOTE: Direct Launch bypasses any enrollment processing and does not produce any transcripts/records for the user; this should be disabled for AICC, SCORM or NETg cookie-based tracking): ☐

Show Browser Toolbar in Launch Window ☐

Pop-up Window Size

Width:

Height:

Properties

This is the web address (URL) of the resource.

The Web Address is the URL invoked when a user launches this resource. You may use the Select button to choose the resource launch file from the File Repository. Alternatively, you may enter any valid web address, with or without parameters. For example, an absolute URL such as "http://mysite.com/page1.htm" for resources that are launched remotely from a separate content web server; or, a relative URL such as "/ekp/nd/tresco/courses/page1.html?UID=anna" for resources that are hosted on the same web server as NetDimensions Talent Suite.

Web Address: Select

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:

Allow user to mark as completed set to enabled by default	<input checked="" type="checkbox"/>	5.0 ?
Enable SCORM 2004 support	<input checked="" type="checkbox"/>	5.6
Use JavaScript SCORM API Adapter	<input checked="" type="checkbox"/>	7.0 ?
Course Player:	<input type="radio"/> Frameset Player <input checked="" type="radio"/> IFrame Player	10.1 ?
Enable module cloning	<input checked="" type="checkbox"/>	5.5 ?
Session Changed E-mail Template to be sent to Participants:	<input type="text"/>	9.3 ?

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 Authentication

To specify NetgLearning Proxied Authentication properties:

- Select the **NetgLearning Proxied 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 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 Safari 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.

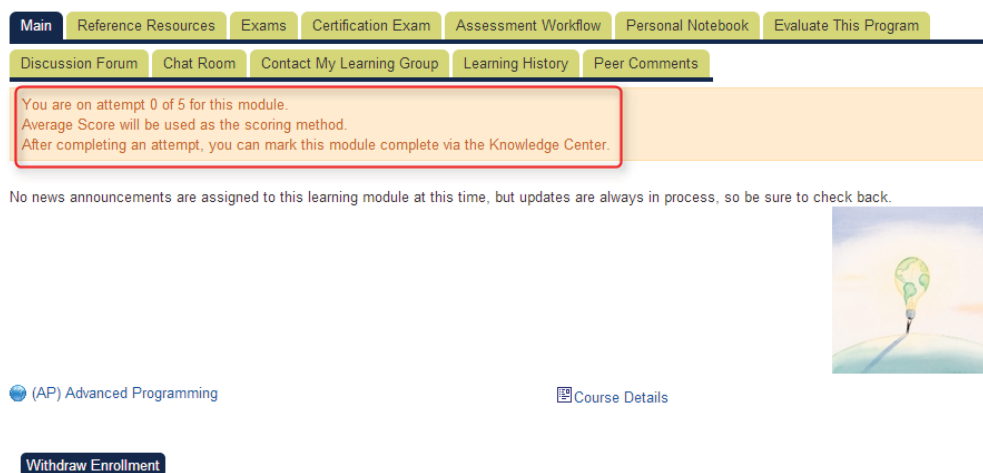
Current Learning Modules



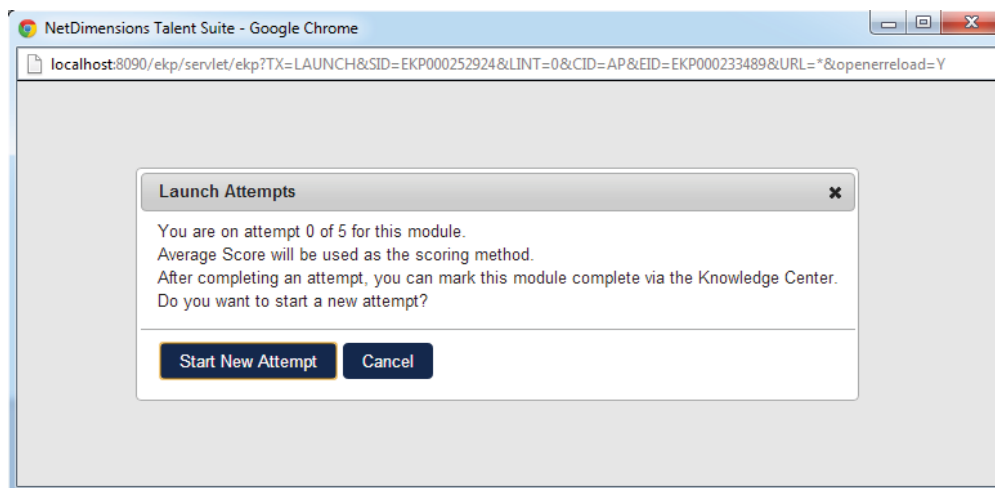
- When the learner goes to the Knowledge Center, the configurations regarding *Attempts Allowed*, *Scoring Method* and *Completion Method* will be detailed.

Knowledge Center

(AP) Advanced Programming



- 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.

Records/Transcript

Click on a learning program/module name to see more detail.

To reopen a course that has been removed from your Knowledge Center, click on the title of the course, and then click on (Reopen Course and Knowledge Center).

Show learning items for

Learning Program/Module	Date	Status	Score	Credits	Module Attribute(s)
(AP) Advanced Programming(Rev. 1)	May 16, 2013 6:33 PM CST	In Process	66.67	0	

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".

Records/Transcript For THOMAS Peter

Here is your learning history:

(AP) Advanced Programming

Details

Enrollment Date: May 16, 2013 6:33 PM CST
 Start Date: May 16, 2013 6:33 PM CST
 End Date:

Course Limited to: 5 Attempts
 Course Scoring Method: Average Score
 Score: 66.67

▼ Attempt 4 - Incomplete

Progress

Lesson Status: Incomplete
 Total Training Time: 00:00:02
 Total # of Online Launches: 1
 Last Attempted Date: May 16, 2013 6:35 PM CST
 Score: N/A

► Attempt 3 (May 16, 2013 6:34 PM CST) - Passed
 ► Attempt 2 (May 16, 2013 6:34 PM CST) - Failed
 ► Attempt 1 (May 16, 2013 6:34 PM CST) - Failed

Launch history

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.

Knowledge Center

(AP) Advanced Programming

[Main](#)
[Reference Resources](#)
[Exams](#)
[Certification Exam](#)
[Assessment Workflow](#)
[Personal Notebook](#)

[Evaluate This Program](#)
[Discussion Forum](#)
[Chat Room](#)
[Contact My Learning Group](#)
[Learning History](#)

[Peer Comments](#)

You are on attempt 4 of 5 for this module.
 Average Score will be used as the scoring method.
 After completing an attempt, you can mark this module complete via the Knowledge Center.

No news announcements are assigned to this learning module at this time, but updates are always in process, so be sure to check back.



(AP) Advanced Programming
 May 16, 2013 6:33 PM CST

Course Details

Mark as completed

This learning activity currently has an overall status of: **IN PROCESS**

Embedded Content

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

Catalog Editor

[Session Properties](#)
[Module Properties](#)

od (od)

1 Catalog Setup

- 1.1 Define Module Properties
- 1.2 Enter cost information
- 1.3 Enter objectives
- 1.4 Enter references
- 1.5 Preview
- 1.6 View usage statistics
- 1.7 Indicated Interest List
- 1.8 Associated Programs Listing
- 1.9 Revisions
- 1.10 Virtual Archive

2 Access control/enrollment control

- 2.1 Define Module Security
- 2.2 Assign prerequisites
- 2.3 Assign Recommended Course(s)
- 2.4 Assign exam/certification/evaluation
- 2.5 Define Enrollment Policy

3 Knowledge Center Setup

- 3.1 Setup Options

4 Launch setup

- 4.1 Define Launch Properties
- 4.2 Preview
- 4.3 Proxied Launch Package

mEKP may result in the host transcript being updated to a final status even though there are attempts remaining.

Run-Time Environment

The run-time environment determines how NetDimensions Talent Suite communicates with the resource.

- ☒ This resource has no built-in support for run-time communication
- ☐ This resource communicates using a JavaScript API (appropriate for SCORM courses and courses that support the AICC API Binding)
- ☐ This resource communicates using an HTTP-based protocol (appropriate for courses that support the AICC HACP Binding)
- ☐ This resource is an exam created using the exam editor.

Address

This is the Web address (URL) of the resource.

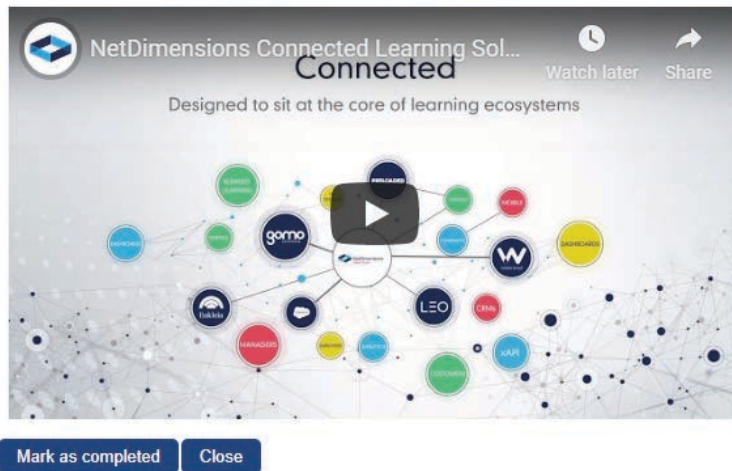
The Web address is the URL invoked when a user launches this resource. You may use the Select button to choose the resource launch file from the file repository. Alternatively, you may enter any valid Web address with or without parameters. For example, an absolute URL such as "http://mysite.com/page1.htm" for resources that are launched remotely from a separate content Web server, or a relative URL such as "/exp/nd/fresco/courses/page1.html?UID=anna" for resources that are hosted on the same Web server as NetDimensions Talent Suite.

Web Address or Embedded Content: [Select](#)

Alternatively, you can select an exam below and choose "Exam" type so that this program can launch a NetDimensions exam.

Exam ID:

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

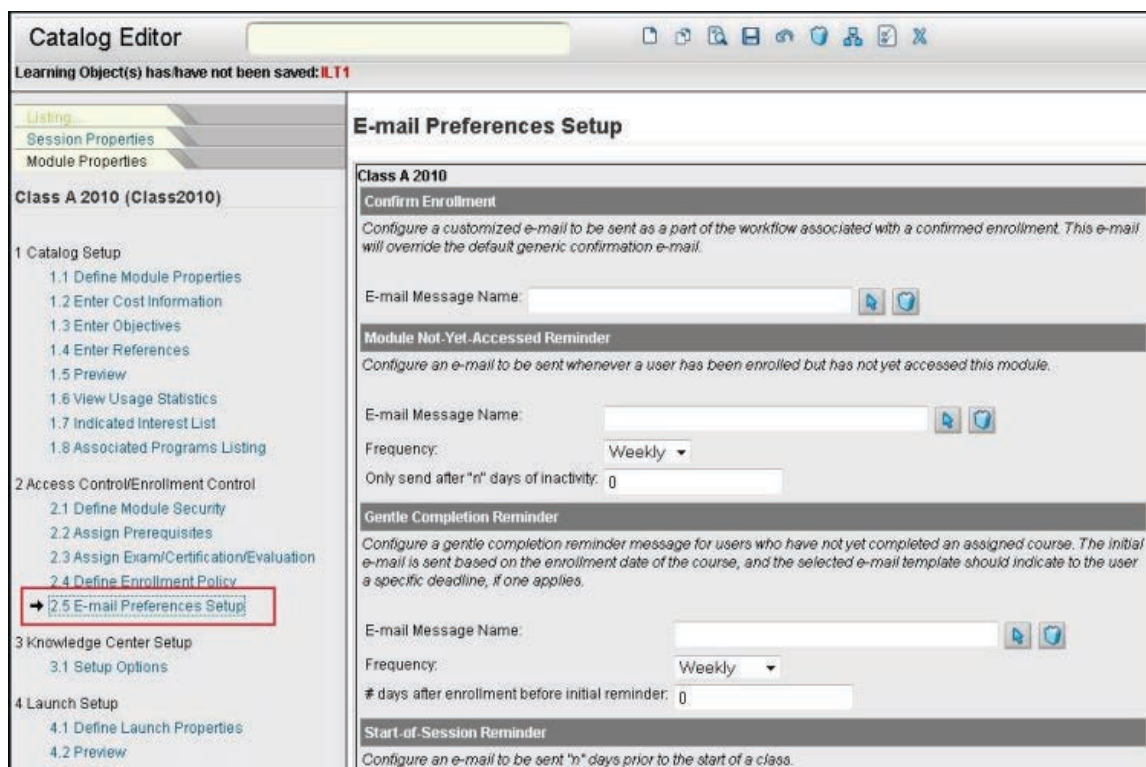


E-mail Preferences Setup

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.

Confirm Enrollment

Configure a customized e-mail to be sent as a part of the workflow associated with a confirmed enrollment. This e-mail will override the default generic confirmation e-mail.

E-mail Message Name:  

3. Navigate to an appropriate e-mail template:

E-mail Template Editor

Templates

- System Default
 - Default Certification Expiration Reminder
 - Default Course Withdrawal Notification
 - Default Enrollment Approval Reminder
 - Default Enrollment Approval Request
 - Default Enrollment Approved Notification
 - Default Enrollment Confirmation**
 - Default Enrollment Denied Notification
 - Default Enrollment Pending
 - Default Enrollment Waitlisted
 - Default Start of Session Reminder
- User Templates
 - 2010 Template
 - Approval Expired Notification
 - Certification Completion
 - Copy of Approval Expired Notification
 - Copy of Copy1
 - Copy of EKP New Email Message
 - Copy1
 - EKP New Email Message
 - Enrollment Confirmation
 - Not-Yet-Accessed Reminder
 - Session Completion Notification
 - Session Waiting



E-mail Template Properties

This form allows editing of the selected template. Note: system default templates are not allowed to be deleted.

Save **Create a Copy** **Cancel** **Usage** **Delete**

Name: Default Enrollment Confirmation

Sender
Specify the sender of the email.

Recipients
Select from the list below the intended recipients for this message.

	To	CC	Omitted
Approver	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Participant	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Direct Appraiser	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
HR Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Course Specific Instructor(s)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Default System Approver	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Default System User/Administrator	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Specific User	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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

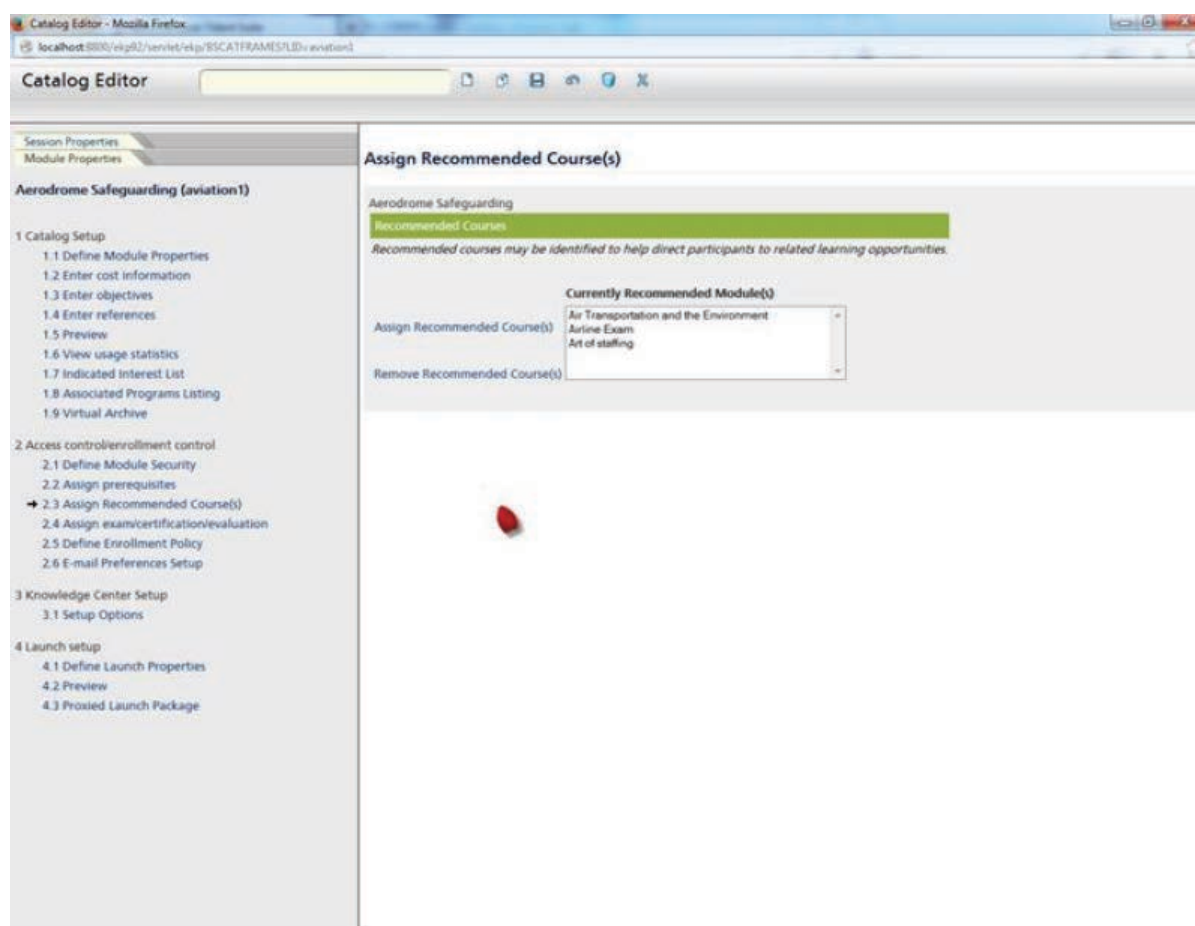
You can configure the following notifications to be sent automatically:

	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

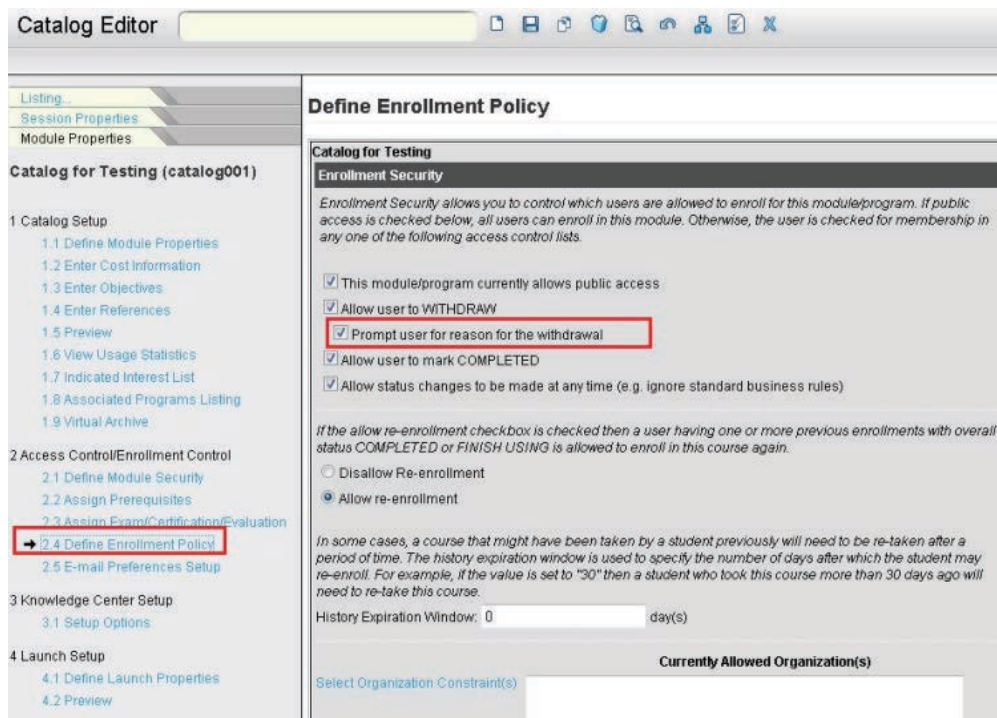
Configuring a Course for Withdrawal

(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.

<input type="checkbox"/> Manager's Email	<input type="checkbox"/> Module Name	<input type="checkbox"/> User Name	<input type="checkbox"/> Role
<input type="checkbox"/> Title	<input type="checkbox"/> User Attribute 1	<input type="checkbox"/> User Attribute 2	<input type="checkbox"/> User Attribute 3
<input type="checkbox"/> User Attribute 4	<input type="checkbox"/> User Attribute 5	<input type="checkbox"/> User Attribute 6	<input type="checkbox"/> User Attribute 7
<input type="checkbox"/> User Attribute 8	<input checked="" type="checkbox"/> User ID	<input type="checkbox"/> User Option 1	<input type="checkbox"/> User Option 2
<input type="checkbox"/> User Option 3			
Account Information			
<input type="checkbox"/> Credit	<input type="checkbox"/> Debit	<input type="checkbox"/> Description	
Business Unit Details			
<input type="checkbox"/> Department Name	<input type="checkbox"/> Organization ID	<input type="checkbox"/> Organization Level	<input type="checkbox"/> Organization Name
Student Withdrawal Details			
<input checked="" type="checkbox"/> Withdraw Date			
Module Properties			
<input type="checkbox"/> Audience	<input type="checkbox"/> Catalog	<input type="checkbox"/> Description	<input type="checkbox"/> Language
<input type="checkbox"/> Learning Type	<input type="checkbox"/> Module ID	<input type="checkbox"/> Module Title	<input type="checkbox"/> Show in Catalog
<input type="checkbox"/> Subject	<input type="checkbox"/> Vendor		
Session Properties			
<input type="checkbox"/> Duration(Training hours)	<input type="checkbox"/> End Date	<input type="checkbox"/> Enrollment Limits	<input type="checkbox"/> Event Status
<input type="checkbox"/> Facilities	<input type="checkbox"/> Geographic Region ID	<input type="checkbox"/> Location	<input type="checkbox"/> Session
<input type="checkbox"/> Start Date	<input type="checkbox"/> Total # of Enrollments		
Reason for Withdrawal			
<input checked="" type="checkbox"/> Reason for Withdrawal			
Geographic Regions			

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.

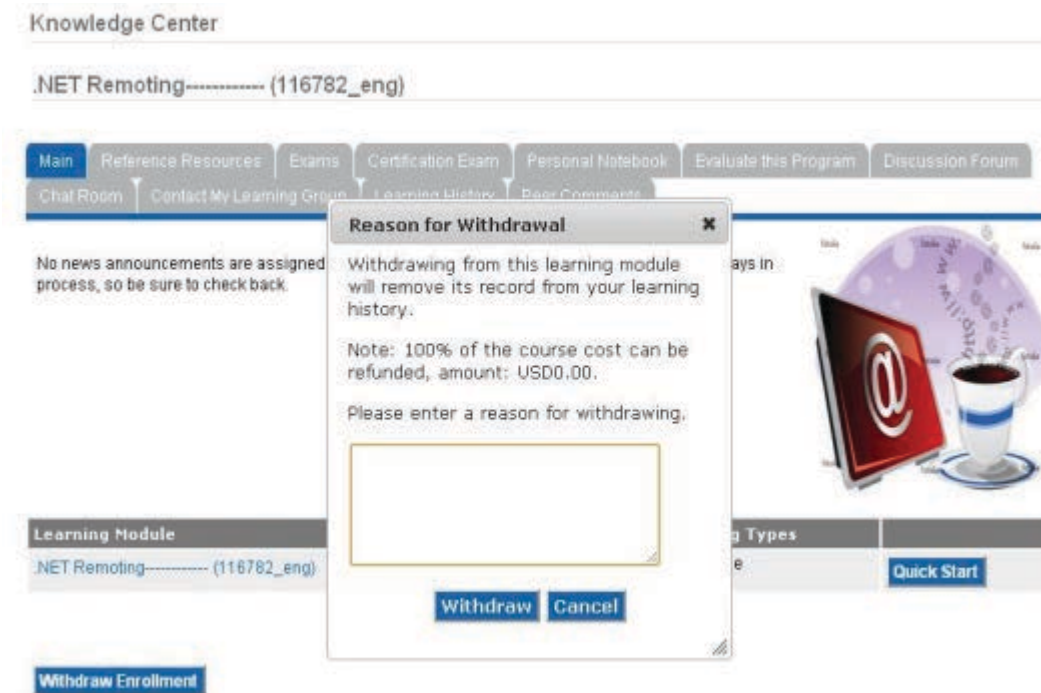
For the Learning Program:

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

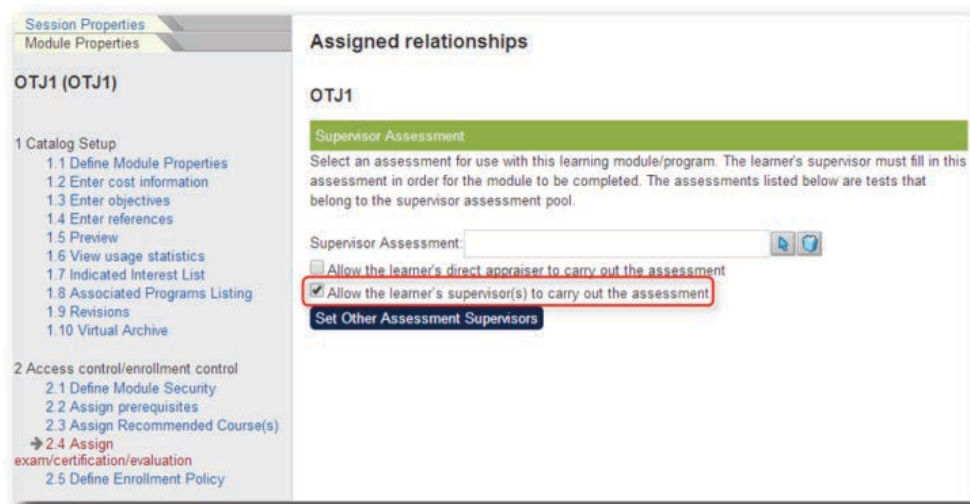
- Need to enter a Reason for Withdrawal
- See a withdrawal refund amount



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

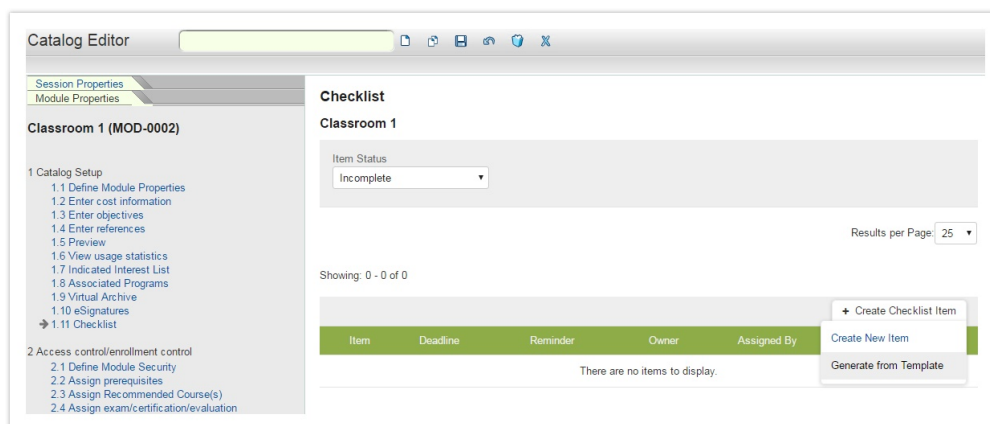
This option is also available in other places:

- 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.

The screenshot shows a 'Checklist' window with a sub-header 'O1 (Online)'. Below it, 'Item Status' is set to 'Incomplete'. A 'Create Item' dialog box is open in the foreground. The dialog has a title bar with a close button. Inside, there is a text field for 'Item*' containing the word 'Required'. Below this is a checkbox for 'Mark as important'. The 'Assigned To*' field shows 'ADMINISTRATOR System (NDADMIN-1)' with a dropdown arrow. The 'Deadline' field is set to '(not specified)' with a calendar icon and a time field set to '00:00'. There is also a checkbox for 'Send reminder' followed by a field for 'days(s) before deadline'. At the bottom are 'OK' and 'Cancel' buttons.

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:

This screenshot shows the 'Create Item' dialog box with the 'Add multi items from checklist template' dropdown menu open. The dropdown list shows 'template 1' selected and highlighted in blue. Below the dropdown are 'OK' and 'Cancel' buttons.

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**:

Course Checklist

Item Status: Course: Session:

Results per Page:

Showing: 1 - 2 of 2

Item	Module, Session	Deadline	Assigned By	Status
<input checked="" type="checkbox"/> Session checklist one	Classroom one, Session One	No Deadline	ADMINISTRATOR System	Incomplete
<input checked="" type="checkbox"/> Module checklist one	Classroom one	No Deadline	ADMINISTRATOR System	Incomplete

Showing: 1 - 2 of 2

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.

Showing: 1 - 3 of 3

Item	Module Title	Session Title	Deadline	Assigned By
<input checked="" type="checkbox"/> Book classroom	O1		Nov 6, 2014 4:30 PM	ADMINISTRATOR System

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.

Instructor Deassigned from Class Email Template: 9.3 ?

Session Retired E-mail Template to be sent to Participants: 10.1 ?

Session Cancelled E-mail Template to be sent to Participants: 9.3 ?

Session Cancelled E-mail Template to be sent to Instructors: 9.3 ?

Allow Assessment Score for online equivalent learning type: ☐ 10.1 ?

Default course image for Catalog Display: 10.2 ?

Course Checklist Item Reminder Email Template: 10.2 ?

Course Checklist Owner Change Email Template: 10.2 ?

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** and choose one to be used as the course checklist owner change email.

Run scheduled tasks >

Tasks Completed

The Hourly tasks have been completed. The log output is shown below.

```

2014/Nov/05 17:33:25 INFO com.netdimen.opml.OpmProcessor.extractOutline: OPM 'file:/E:/workspace/ekp102/WEB-INF/conf/imports-hourly.opml' not found;
2014/Nov/05 17:33:25 INFO com.netdimen.opml.OpmProcessor.extractOutline: OPM 'file:/E:/workspace/ekp102/WEB-INF/conf/exports-hourly.opml' not found;
2014/Nov/05 17:33:25 INFO com.netdimen.core.schedule.LicenseThresholdAlertTask.execute: License Threshold Alert Task Started.
2014/Nov/05 17:33:25 INFO com.netdimen.core.schedule.HourlyHousekeepingTask.execute: ----- Hourly housekeeping processing commencing...
2014/Nov/05 17:33:25 INFO com.netdimen.core.schedule.ChecklistReminderTask.checkChecklistReminders: Checklist reminder emails sent: 150
  
```

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.

Checklist

Program 0011 (MOD-0011) (Session1)

Item Status
All

Result per page: 10

Showing: 1 - 10 of 14

+ Create Item

	Item Title	Deadline	Send Reminder	Owner	Assigned By	Status
<input type="checkbox"/>	Morning stand up	No deadline	No reminder	Wilson Wu	Wilson Wu	Incomplete
<input type="checkbox"/>	Code on time	Feb 29, 2016...	No reminder	Wilson Wu	Wilson Wu	Incomplete
<input type="checkbox"/>	Help with styling	No deadline	No reminder	No Owner	Wilson Wu	Incomplete
<input type="checkbox"/>	Final review	Feb 29, 2016...	2-day(s)-before deadline	Wilson Wu	Wilson Wu	Completed On Jan 6, 2015 14:28 by Lily White

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.

+ Create Checklist Item

Item	Deadline	Reminder	Owner	Assigned By	Status
Session checklist one	No Deadline	-	NEW Learner 31	USER One	Incomplete

Edit

Mark as completed

Delete

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.

						+ Create Checklist Item
Item	Deadline	Reminder	Owner	Assigned By	Status	
Session checklist one	No Deadline	-	NEW Learner 31	USER One	Completed On Feb 16, 2017 1:28 PM by USER One	

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.

Instructor Deassigned from Class Email Template:	<input type="text"/>		9.3	
Session Retired E-mail Template to be sent to Participants:	<input type="text"/>		10.1	
Session Cancelled E-mail Template to be sent to Participants:	<input type="text"/>		9.3	
Session Cancelled E-mail Template to be sent to Instructors:	<input type="text"/>		9.3	
Allow Assessment Score for online equivalent learning type	<input type="checkbox"/>		10.1	
Default course image for Catalog Display	<input type="text" value="/ekp/nd/fresco/images/decorate/catalog_default.jpg"/>	Preview	10.2	
Course Checklist Item Reminder Email Template:	<input type="text"/>		10.2	
Course Checklist Owner Change Email Template:	<input type="text"/>		10.2	

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

[Run scheduled tasks](#)

Tasks Completed

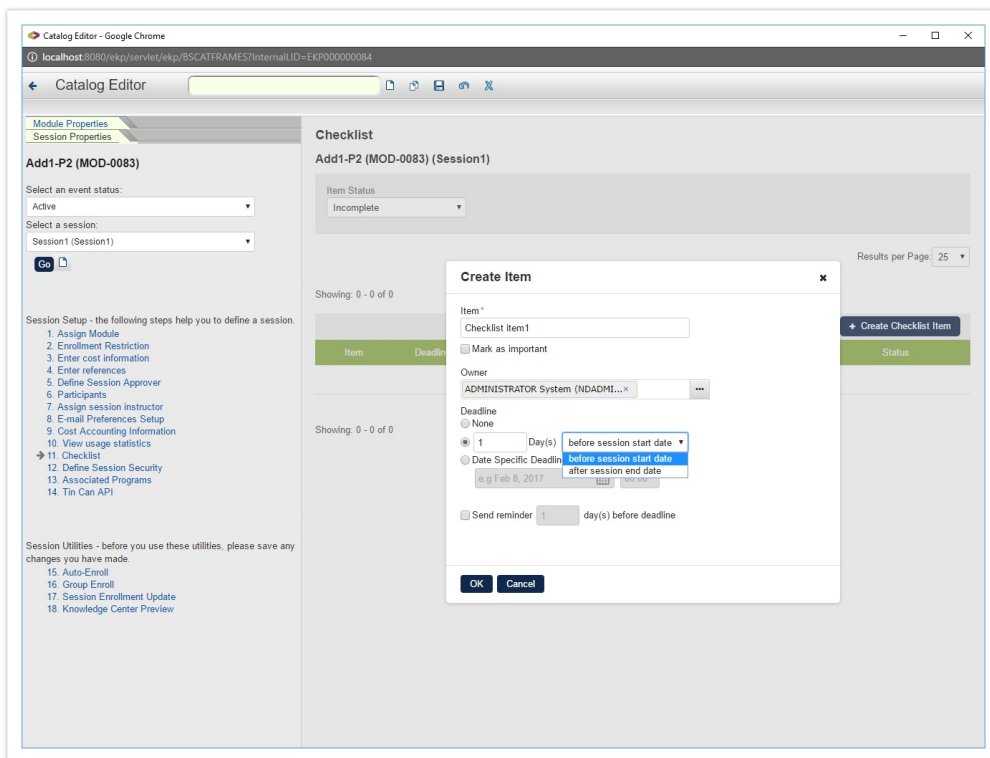
The Hourly tasks have been completed. The log output is shown below:

```

2014/Nov/05 17:33:25 INFO com.netdimen.opml.OpmProcessor.extractOutline: OPM 'file://E:/workspace/ekp102/WEB-INF/conf/imports-hourly.opml' not found;
2014/Nov/05 17:33:25 INFO com.netdimen.opml.OpmProcessor.extractOutline: OPM 'file://E:/workspace/ekp102/WEB-INF/conf/exports-hourly.opml' not found;
2014/Nov/05 17:33:25 INFO com.netdimen.core.schedule.LicenseThresholdAlertTask.execute: License Threshold Alert Task Started.
2014/Nov/05 17:33:25 INFO com.netdimen.core.schedule.HourlyHousekeepingTask.execute: ----- Hourly housekeeping processing commencing...
2014/Nov/05 17:33:25 INFO com.netdimen.core.schedule.HourlyHousekeepingTask.execute: ----- Hourly housekeeping processing completed.
2014/Nov/05 17:33:25 INFO com.netdimen.core.schedule.ChecklistReminderTask.checkChecklistReminders: Checklist reminder emails sent: 150
  
```

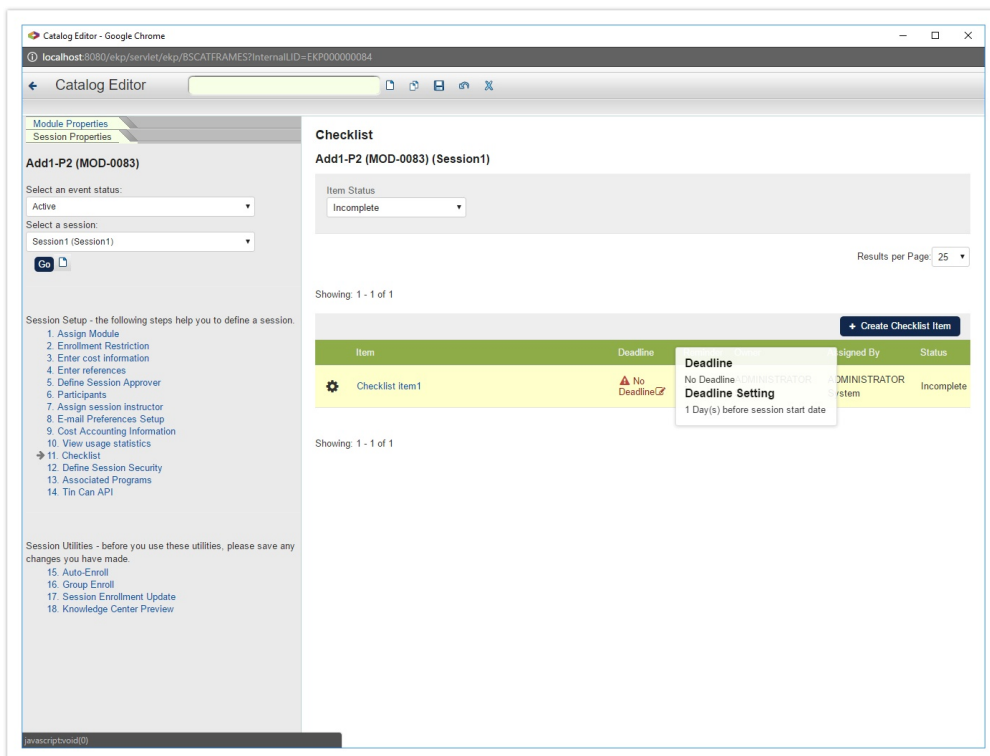
Relative Deadlines for Checklist Items

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.

Catalog Editor - Google Chrome

localhost:8080/ekp/servelet/ekp/BSCATFRAME?InternalID=EKPD000000084

Catalog Editor

Learning object(s) has/have not been saved.:MOD-0083

Session Properties

Add1-P2 (MOD-0083)

Select an event status:
Active

Select a session:
Session1 (Session1)

Session Setup - the following steps help you to define a session.

1. Assign Module
2. Enrollment Restriction
3. Enter cost information
4. Enter references
5. Define Session Approver
6. Participants
7. Assign session instructor
8. E-mail Preferences Setup
9. Cost Accounting Information
10. View usage statistics
11. Checklist
12. Define Session Security
13. Associated Programs
14. Tin Can API

Session Utilities - before you use these utilities, please save any changes you have made.

15. Auto-Enroll
16. Group Enroll
17. Session Enrollment Update
18. Knowledge Center Preview

Checklist

Add1-P2 (MOD-0083) (Session1)

Item Status: Incomplete

Results per Page: 25

Showing: 1 - 1 of 1

Create Checklist Item

Item	Deadline	Assigned By	Status
Checklist item1	Feb 8, 2017 12:00 AM	ADMINISTRATOR	Incomplete

Showing: 1 - 1 of 1

Deadline Setting
Feb 8, 2017 12:00 AM
1 Day(s) before session start date

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

Catalog Editor - Google Chrome

localhost:8080/ekp/servelet/ekp/BSCATFRAME?InternalID=EKPD000000084

Catalog Editor

Learning object(s) has/have not been saved.:MOD-0083

Session Properties

Add1-P2 (MOD-0083)

Select an event status:
Active

Select a session:
Session1 (Session1)

Session Setup - the following steps help you to define a session.

1. Assign Module
2. Enrollment Restriction
3. Enter cost information
4. Enter references
5. Define Session Approver
6. Participants
7. Assign session instructor
8. E-mail Preferences Setup
9. Cost Accounting Information
10. View usage statistics
11. Checklist
12. Define Session Security
13. Associated Programs
14. Tin Can API

Session Utilities - before you use these utilities, please save any changes you have made.

15. Auto-Enroll
16. Group Enroll
17. Session Enrollment Update
18. Knowledge Center Preview

Checklist

Add1-P2 (MOD-0083) (Session1)

Item Status: Incomplete

Results per Page: 25

Showing: 1 - 2 of 2

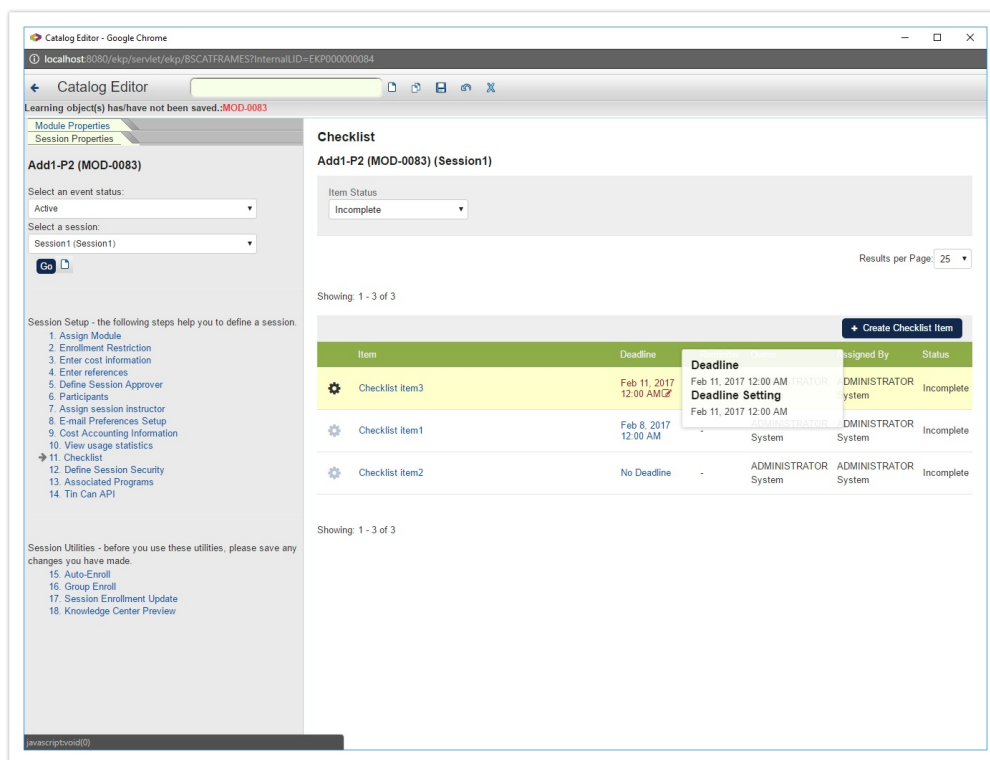
Create Checklist Item

Item	Deadline	Assigned By	Status
Checklist item1	Feb 8, 2017 12:00 AM	ADMINISTRATOR	Incomplete
Checklist item2	No Deadline	ADMINISTRATOR	Incomplete

Showing: 1 - 2 of 2

Deadline Setting
No Deadline

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:

[Checklist Template](#) >

Create/Edit Checklist Template

Template Name *
Default Template

Checklist Items

Bulk Action ▾ + Create Checklist Item

<input type="checkbox"/>	Item Title	Owner	Deadline	Send Reminder
<input type="checkbox"/>	! Morning stand up	Wilson Wu (WW)	No deadline	No reminder
<input type="checkbox"/>	Edit	Wilson Wu (WW)	No deadline	No reminder
<input type="checkbox"/>	Delete	Wilson Wu (WW)	7 day(s) before session start date	7 day(s) before deadline
<input type="checkbox"/>	Final review	Wilson Wu (WW)	30 day(s) before session start date	7 day(s) before deadline

Create Item

Item *
Required

☐ Mark as important

Owner
Q q (Q) x ...

Deadline
☒ No deadline
☐ 0 Day(s) after session start date ▾

☐ Send reminder 1 day(s) before deadline

Create Cancel

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 *

Checklist Items

Bulk Action ▾

+ Create Checklist Item

	Item Title	Owner	Deadline	Reminder
<input type="checkbox"/>	 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.

Catalog Editor

Module Properties
Session Properties

Behavioral Analysis (ba)

Select an event status:
Active

Select a session:
Basic Course, Dec 18, 2017 10:00 AM (Room 1)

Go

Session Setup - the following steps help you to define a session.

1. Edit session
2. Edit session class schedule
3. Enrollment Restriction
4. Enter cost information
5. Enter references
6. Participants
7. Instructors
8. E-mail Preferences Setup
9. Cost Accounting Information
10. View usage statistics
11. Checklist
12. Course Coupon
13. Resource Reservation
14. Define Session Security
15. Associated Programs
16. Tin Can API

Session Utilities - before you use these utilities, please save any changes you have made.

17. Auto-Enroll
18. Group Enroll
19. Group Training Plan
20. Knowledge Center Preview

Edit session properties

Behavioral Analysis (Dec 18, 2017 10:00 AM - Dec 21, 2017 5:30 PM)

Required Event Attributes

This form allows you to maintain session properties. A session must be defined for any module type that requires enrollment processing, including online and classroom modules.

Module ID: ba

Session Title: Basic Course

Session Code: B 1

Description: Behavioral Analysis Basic Course

Event Status: Prompt user to select session.

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

☒ Show session selection reminder

☒ 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.

Delivery Language: Auto-Select

Select organization constraint(s) for session viewing

Instructor Contact E-mail:

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.

Course Specific Approver #1:

Course Specific Approver #2:

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	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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)	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • 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	<p>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.</p> <p>The Default Reserve seats for learner enrollments pending approval Setting under System Configuration > General determines whether this option will be set as the default.</p>
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	<ul style="list-style-type: none"> • Automatic Upgrade • Manual (Administrator) Upgrade • Waitlist all learners • No waitlist <p>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.</p>
Dropped from waitlist handling: Transfer users dropped from waitlist to the following session	<p>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.</p> <p>Note : The selected session has to be of the Active, Pending, Invitation Only, or Prompt User to Select Session status.</p>
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:	<ul style="list-style-type: none"> • 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. <p>Note: new deadline settings must be explicitly applied to the selected learners in order for the new deadline to be reflected in their transcripts.</p>

Once the deadline against a transcript has passed	<ul style="list-style-type: none"> • 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	<p>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:</p> <ul style="list-style-type: none"> • 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.

Course Specific Approver #1:

Course Specific Approver #2:

Comments:

Enrollment Limits:

Min:

Max: ☐ Fixed

☒ Based on facility size/capacity

Total Enrollment #: 0

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:

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

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

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

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". 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** in the Session Properties. Then click the **Add New** button to launch the class scheduler.

Session Class Schedule

Catalog for Testing (catalog001)

Classroom-based Event Details

The following information should be provided if the module session or event is live (e.g. EVENT TYPE is SCHEDULED CLASS) instead of online. Start Date and End Date are taken from the first and last scheduled classes respectively.

Start Date: (Date to be confirmed)
 End Date: (Date to be confirmed)
 Time Zone: (GMT-06:00) America/Chicago: Central Standard Time
 Geographic Region: N/A

In catalog Session Date/Time field
☒ Display dates/times entered above
☐ Display custom text
 Custom Text:

Class Schedule

Add items to the schedule by clicking "Add New". You must click the Save icon to save any changes.

	Start Time	End Time	Facility Code	Venue
<input type="button" value="Add New"/>				
<input type="button" value="Delete Selected"/>				
<input type="button" value="Delete All"/>				

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

Session Class Schedule

Catalog for Testing (Jun 21, 2011 9:00 AM)

Classroom-based Event Details

The following information should be provided if the module session or event is live (e.g. EVENT TYPE is SCHEDULED CLASS) instead of online. Start Date and End Date are taken from the first and last scheduled classes respectively.

Start Date: Jun 21, 2011 9:00 AM
 End Date: Jun 23, 2011 5:00 PM
 Time Zone: (GMT-06:00) America/Chicago: Central Standard Time
 Geographic Region: N/A

In catalog Session Date/Time field
☒ Display dates/times entered above
☐ Display custom text
 Custom Text:

Class Schedule

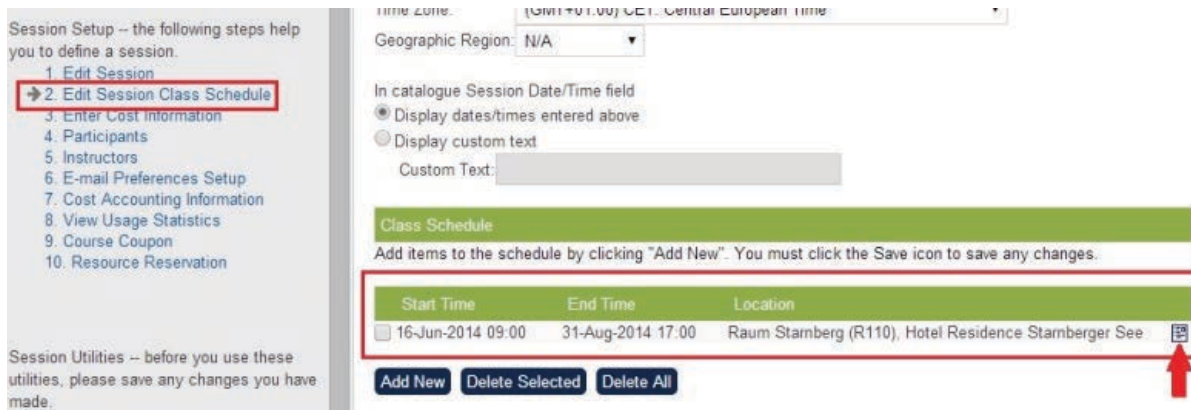
Add items to the schedule by clicking "Add New". You must click the Save icon to save any changes.

	Start Time	End Time	Facility Code	Venue
<input type="checkbox"/>	Jun 21, 2011 9:00 AM	Jun 23, 2011 5:00 PM		
<input type="checkbox"/>				

Click the **Save** icon to finish.

Editing a Class

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



Session Setup -- the following steps help you to define a session.

1. Edit Session
2. Edit Session Class Schedule
3. Enter Cost Information
4. Participants
5. Instructors
6. E-mail Preferences Setup
7. Cost Accounting Information
8. View Usage Statistics
9. Course Coupon
10. Resource Reservation

Session Utilities -- before you use these utilities, please save any changes you have made.

Time Zone: [GMT+01:00] CET - Central European Time

Geographic Region: N/A

In catalogue Session Date/Time field


☒ Display dates/times entered above

☐ Display custom text

Custom Text:

Class Schedule

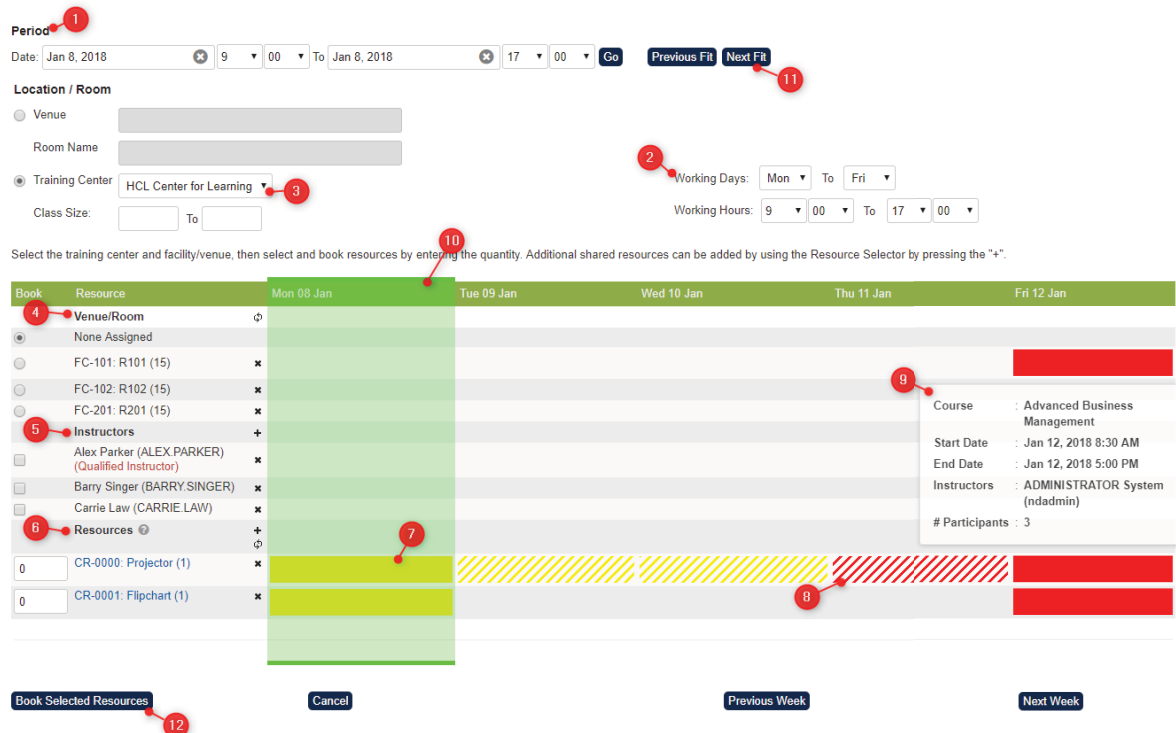
Add items to the schedule by clicking "Add New". You must click the Save icon to save any changes.

Start Time	End Time	Location	
<input type="checkbox"/> 16-Jun-2014 09:00	31-Aug-2014 17:00	Raum Starnberg (R110), Hotel Residence Starnberger See	

Add New **Delete Selected** **Delete All**

Using the Class Scheduler

Schedule a New Class



Period 1

Date: Jan 8, 2018 9:00 To Jan 8, 2018 17:00 **Go** **Previous Fit** **Next Fit** 11

Location / Room

☐ Venue

Room Name

☒ Training Center HCL Center for Learning 3

Class Size: To

Working Days: Mon To Fri 2

Working Hours: 9:00 To 17:00

Select the training center and facility/venue, then select and book resources by entering the quantity. Additional shared resources can be added by using the Resource Selector by pressing the "+".

Book	Resource	Mon 08 Jan	Tue 09 Jan	Wed 10 Jan	Thu 11 Jan	Fri 12 Jan
4	Venue/Room					
<input checked="" type="radio"/>	None Assigned					
<input type="radio"/>	FC-101: R101 (15)	x				
<input type="radio"/>	FC-102: R102 (15)	x				
<input type="radio"/>	FC-201: R201 (15)	x				
5	Instructors					
<input type="checkbox"/>	Alex Parker (ALEX PARKER) (Qualified Instructor)	x				
<input type="checkbox"/>	Barry Singer (BARRY SINGER)	x				
<input type="checkbox"/>	Carrie Law (CARRIE LAW)	x				
6	Resources					
0	CR-0000: Projector (1)	x				
0	CR-0001: Flipchart (1)	x				

Book Selected Resources 12 **Cancel** **Previous Week** **Next Week**

Course: Advanced Business Management

Start Date: Jan 12, 2018 8:30 AM

End Date: Jan 12, 2018 5:00 PM

Instructors: ADMINISTRATOR System (ndadmin)

Participants: 3

To set up a session class for a course:

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

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

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:

Role General Permissions		No	Yes
Allow Look and Feel Change	<input type="checkbox"/>	<input type="radio"/>	<input checked="" type="radio"/>
Allow Admin Online Help	<input type="checkbox"/>	<input type="radio"/>	<input checked="" type="radio"/>
Allow Unrestricted Delegation	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>
Allow 9-Box Report Deployment	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>
Allow Full Organization View of Participants	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>
Allow Skillsoft (OLSA) Search	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>
Allow Global Homework Files Access	<input type="checkbox"/>	<input checked="" type="radio"/>	<input type="radio"/>

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

Catalog Editor

Learning object(s) has/have not been saved.:ba

Module Properties
Session Properties

Behavioral Analysis (ba)

Select an event status:
Active

Select a session: 1
Basic Course, Dec 18, 2017 10:00 AM (Room 1)

Go

Session Setup - the following steps help you to define a session.

1. Edit session
2. Edit session class schedule
3. Enrollment Restriction
4. Enter cost information
5. Enter references
6. **Participants** 2
7. Instructors
8. E-mail Preferences Setup
9. Cost Accounting Information
10. View usage statistics
11. Checklist
12. Course Coupon
13. Resource Reservation
14. Define Session Security
15. Associated Programs
16. Tin Can API

Session Utilities - before you use these utilities, please save any changes you have made.

17. Auto-Enroll
18. Group Enroll
19. Group Training Plan
20. Knowledge Center Preview

Participants

Behavioral Analysis (Dec 18, 2017 10:00 AM - Dec 21, 2017 5:30 PM)

HIDE FILTERS

First Name 3 Last Name User ID

Status 4
All

Filter

Results per Page: 25

Showing: 1 - 16 of 16

Bulk Action

Participant	Date	Deadline	Overall Status	Overall Status Change
FOX Adam (ADAM.FOX)	Enrolled on Dec 13, 2017 3:41 PM HKT	Date to be confirmed	WAITLISTED	5
WOODLEY Adam (ZCORP_ADAM)	Enrolled on Dec 13, 2017 3:41 PM HKT	Date to be confirmed	WAITLISTED	
ALLEN Barry (BARRY.ALLEN)	Enrolled on Dec 13, 2017 3:41 PM HKT	Date to be confirmed	NOT STARTED	
ALLEN Barry (BARRY.ALLEN)	Withdrawn on Dec 13, 2017 3:31 PM HKT	Not Applicable	WITHDRAW - VALID REASON	

Not Started
Withdrawn
Withdraw - Invalid Reason
Dropped from Waitlist
Withdraw - Valid Reason
Withdraw - Valid Reason (Bereavement)
Withdraw - Valid Reason (Sick Leave)
Withdraw - Valid Reason (Jury Duty)
Withdraw - Valid Reason (Vacation Leave)
Withdrawn - Account Closed

The table below shows the allowed status transitions:

Pre-statuses		Current Status		Post-Statuses
Completed's Pre-statuses		Waiver/Exempt		Completed's Post-statuses
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		-

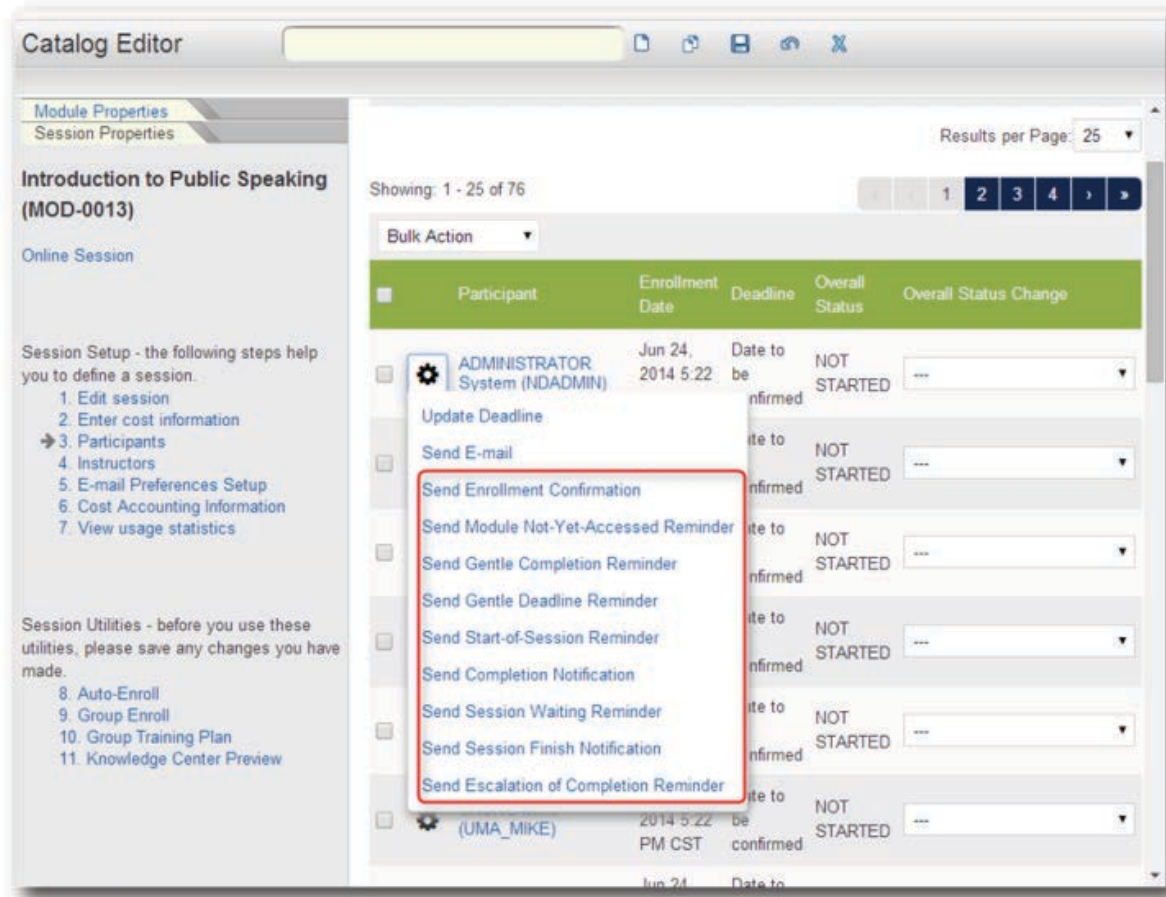
The list of **Transcript Statuses** that you see under **Filter** and **Overall Status Change** will also depend on **Permissions**.

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:

Bulk Action	Participant	Enrollment Date	Deadline	Overall Status	Overall Status Change
Bulk Action Update Deadline Send E-mail	ADMINISTRATOR System (NDADMIN)	Aug 12, 2013 2:04 PM CST	Not Applicable	COMPLETED	---
<input type="checkbox"/>	NETD Ryan (RYAN)	Oct 24, 2013 11:39 AM CST	Nov 23, 2013 11:39 AM CST	NOT STARTED	---
<input type="checkbox"/>	STUDENT 100 (UO1)	Oct 24, 2013 11:39 AM CST	Nov 23, 2013 11:39 AM CST	NOT STARTED	---
<input type="checkbox"/>	Update Deadline Send E-mail Substitute Participant	Oct 24, 2013 11:39 AM CST	Nov 23, 2013 11:39 AM CST	NOT STARTED	---
<input type="checkbox"/>	STUDENT 3 New (U3)	Jul 19, 2013 6:02 PM CST	Date to be confirmed	NOT STARTED	---
<input type="checkbox"/>	STUDENT 3 New (U3)	Oct 24, 2013 11:39 AM CST	Nov 23, 2013 11:39 AM CST	NOT STARTED	---
<input type="checkbox"/>	STUDENT 3 New (U3)	Jul 9, 2013 3:56 PM CST	Not Applicable	COMPLETED	---

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

Update Participant Deadlines

For "(netd-java-online-basic) NETD Java Online Course [Basic]"

Deadline Method
Days from Enrollment
30 Days (0 implies unlimited)
Preview

Days from Enrollment
No Deadline
Days from Enrollment
Specific Day

Participant	Updated Deadline Will be
NETD Ryan (RYAN)	Nov 23, 2013 11:39 AM CST
STUDENT 100 (UO1)	Nov 23, 2013 11:39 AM CST
STUDENT 1 New (U1)	Nov 23, 2013 11:39 AM CST
STUDENT 2 New (U2)	Aug 18, 2013 6:02 PM CST
STUDENT 3 New (U3)	Nov 23, 2013 11:39 AM CST

⚠ The deadline update will not be applied to the following participants as they have reached a terminal status

Participant	Status
ADMINISTRATOR System (NDADMIN)	COMPLETED
STUDENT 3 New (U3)	COMPLETED

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.

Update Participant Deadlines

For "(netd-java-online-basic) NETD Java Online Course [Basic]"

Deadline Method
Specific Day

18 OCT 2006

20 00

Preview

Participant	Updated Deadline Will be
NETD Ryan (RYAN)	⚠ Oct 18, 2006 8:00 PM CST
STUDENT 100 (U01)	⚠ Oct 18, 2006 8:00 PM CST
STUDENT 1 New (U1)	⚠ This is a past date 0 PM CST
STUDENT 2 New (U2)	⚠ Oct 18, 2006 8:00 PM CST
STUDENT 3 New (U3)	⚠ Oct 18, 2006 8:00 PM CST

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".

Update Participant Deadlines

For "(netd-java-online-basic) NETD Java Online Course [Basic]"

Deadline Method
Days from Enrollment

55 Days (0 implies unlimited)

Preview

Participant	Updated Deadline Will be
NETD Ryan (RYAN)	
STUDENT 100 (U01)	
STUDENT 1 New (U1)	
STUDENT 2 New (U2)	
STUDENT 3 New (U3)	

Confirmation

Deadlines may have been changed but not previewed, confirm to proceed?

OK Cancel

⚠ The deadline update will not be applied to the following participants as they have reached a terminal status

Participant	Status
ADMINISTRATOR System (NDADMIN)	COMPLETED

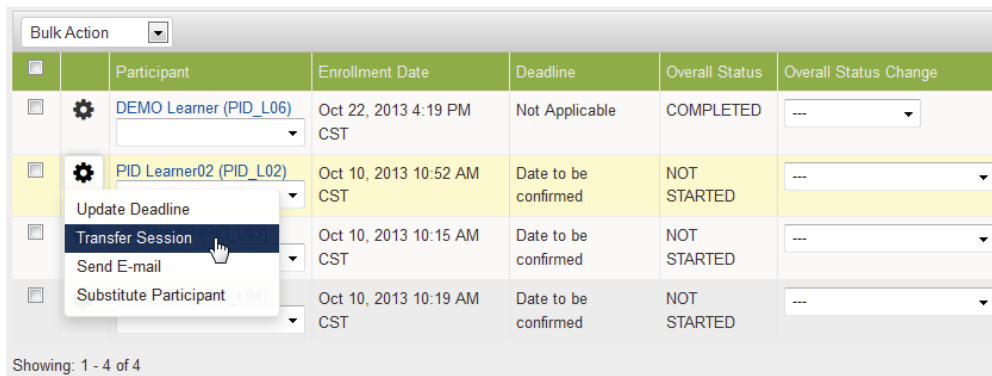
Update Cancel

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)

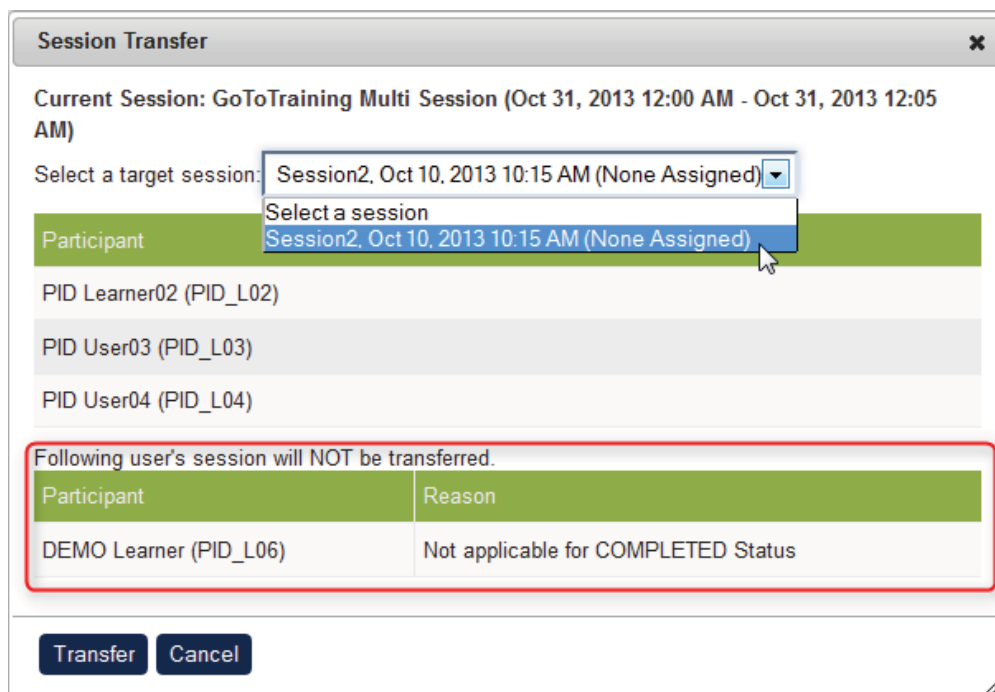
This feature allows the user to transfer a participant to another session. Only users who have not yet completed the session are eligible to transfer to another session. The session transfer feature has been integrated into the Participants List in Catalog Editor. Catalog administrators can transfer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



The screenshot shows a table with columns: Bulk Action, Participant, Enrollment Date, Deadline, Overall Status, and Overall Status Change. A context menu is open for the participant 'PID Learner02 (PID_L02)', showing options: Update Deadline, Transfer Session (highlighted), Send E-mail, and Substitute Participant (L04). Below the table, it says 'Showing: 1 - 4 of 4'.

Bulk Action	Participant	Enrollment Date	Deadline	Overall Status	Overall Status Change
	DEMO Learner (PID_L06)	Oct 22, 2013 4:19 PM CST	Not Applicable	COMPLETED	---
	PID Learner02 (PID_L02)	Oct 10, 2013 10:52 AM CST	Date to be confirmed	NOT STARTED	---
		Oct 10, 2013 10:15 AM CST	Date to be confirmed	NOT STARTED	---
		Oct 10, 2013 10:19 AM CST	Date to be confirmed	NOT STARTED	---

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



The dialog box titled 'Session Transfer' shows the current session: 'GoToTraining Multi Session (Oct 31, 2013 12:00 AM - Oct 31, 2013 12:05 AM)'. It prompts to 'Select a target session:' with a dropdown menu showing 'Session2, Oct 10, 2013 10:15 AM (None Assigned)'. Below, a list of participants is shown: 'PID Learner02 (PID_L02)', 'PID User03 (PID_L03)', and 'PID User04 (PID_L04)'. A red box highlights a message: 'Following user's session will NOT be transferred.' followed by a table:

Participant	Reason
DEMO Learner (PID_L06)	Not applicable for COMPLETED Status

At the bottom are 'Transfer' and 'Cancel' buttons.

Session Transfer failed with reason shown next to the failed participants

Session Transfer

Current Session: GoToTraining Multi Session (Oct 31, 2013 12:00 AM - Oct 31, 2013 12:05 AM)

Select a target session: Session2, Oct 10, 2013 10:15 AM (None Assigned)

Participant

PID Learner02 (PID_L02)
Enrollment failed, the training is now over.

PID User03 (PID_L03)
Enrollment failed, email address already in use.

PID User04 (PID_L04)
Enrollment failed, the training is now over.

Following user's session will NOT be transferred.

Participant	Reason
DEMO Learner (PID_L06)	Not applicable for COMPLETED Status

Transfer

Cancel

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'.

Enrollment Policy Editor

Enrollment Policy Details

DA Approval

Enrollment Policy Details

Policy Name: DA Approval

Enrollment types that need to send the Enrollment Confirmation

☒ Group Enrollment

☐ Self-enrollment

☒ Auto Enrollment

Enrollment Confirmation: Default Enrollment Confirmation

Enrollment Pending Notification: Default Enrollment Pending

Waitlisted Notification: Default Enrollment Waitlisted

Withdrawal Notification: Default Course Withdrawal Notification

Approved Notification: Default Enrollment Approved Notification

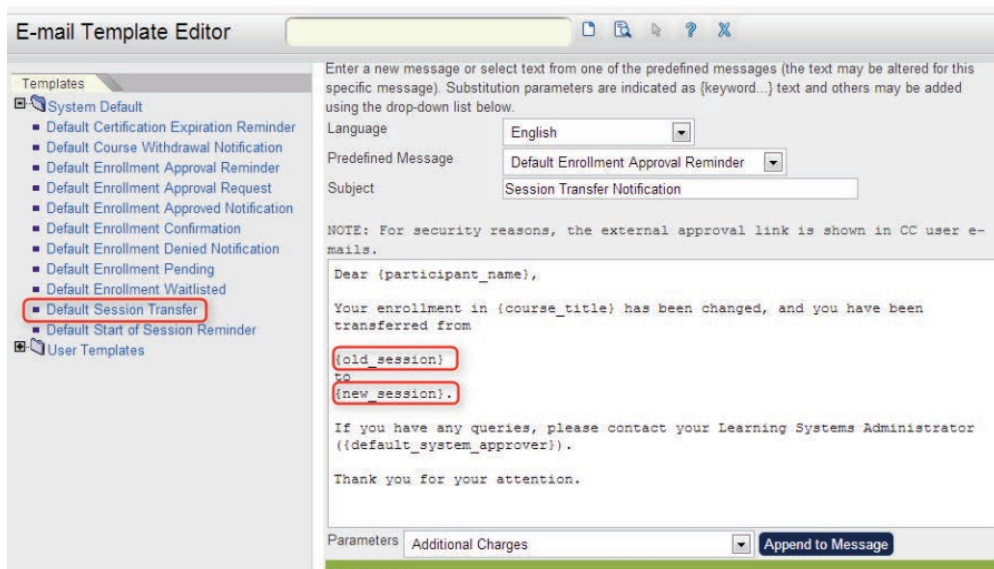
Denied Notification: Default Enrollment Denied Notification

Session Transfer Notification: msg.Default_Session_XFER_Message_Name

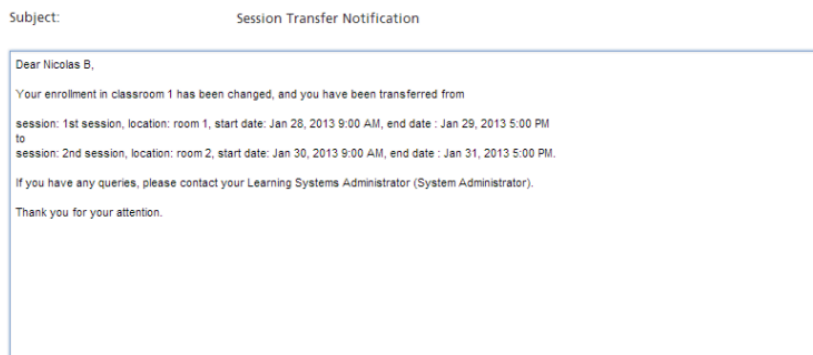
New Sessions Available Notification:

Policy Remarks: This is a system policy that may be used for two-level approvals.

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

Catalog Editor

Enrollment listing for C2

C2 (Oct 23, 2013 9:00 AM - Oct 29, 2013 5:00 PM)

Select an event status: **Active**

Select a session: **Oct 23, 2013 9:00 AM (Various)**

Go [Icons]

Session Setup - the following steps help you to define a session.

1. Edit session
2. Edit session class schedule
3. Enter cost information
- 4. Participants
5. Instructors
6. E-mail Preferences Setup
7. Cost Accounting Information
8. View usage statistics
9. Resource Reservation

Session Utilities - before you use these utilities, please save any changes you have made.

First Name: [Text Box] Last Name: [Text Box]

User ID: [Text Box] Status: **All**

Filter

Results per Page: 25

Showing: 1 - 1 of 1

Bulk Action: [Dropdown]

	Participant	Enrollment Date	Deadline	Overall Status	Overall Status Change
<input type="checkbox"/>	ADMINISTRATOR System	Oct 21, 2013 6:38 PM CST	Date to be confirmed	NOT STARTED	---

Context menu options: Update Deadline, Transfer Session, Send E-mail, **Substitute Participant**

The Substitute Participant button in the Participant list

Catalog Editor

Enrollment listing for C2

C2 (Oct 23, 2013 9:00 AM - Oct 29, 2013 5:00 PM)

Select an event status: **Active**

Select a session: **Oct 23, 2013 9:00 AM (Various)**

Go [Icons]

Session Setup - the following steps help you to define a session.

1. Edit session
2. Edit session class schedule
3. Enter cost information
- 4. Participants
5. Instructors
6. E-mail Preferences Setup
7. Cost Accounting Information
8. View usage statistics
9. Resource Reservation

Session Utilities - before you use these utilities, please save any changes you have made.

First Name: [Text Box] Last Name: [Text Box]

User ID: [Text Box] Status: **All**

Filter

Results per Page: 25

Showing: 1 - 1 of 1

Bulk Action: [Dropdown]

	Participant	Date	Status
<input type="checkbox"/>	ADMINISTRATOR System (NDADMIN)	Oct 21, 2013 6:38 PM CST	NOT STARTED

Showing: 1 - 1 of 1

Substitute dialog box:

For "C2"

Select a user to substitute "ADMINISTRATOR System (NDADMIN)"

[Text Input Field] [More Options Icon]

☒ Send Notification E-mails

Substitute **Cancel**

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:

Catalog Editor

Module Properties
Session Properties

no title (MOD-0241)

Select an event status:
Active

Select a session:
Date to be confirmed (None Assigned)

Go

Session Setup - the following steps help you to define a session.

1. Edit session
2. Edit session class schedule
3. Enrollment Restriction
4. Enter cost information
5. Enter references
6. **Participants**
7. Instructors
8. E-mail Preferences Setup
9. Cost Accounting Information
10. View usage statistics
11. Checklist
12. Resource Reservation
13. Define Session Security
14. Associated Programs
15. Tin Can API

Session Utilities - before you use these utilities, please save any changes you have made.

16. Auto-Enroll
17. Group Enroll
18. Group Training Plan
19. Knowledge Center Preview

Participants

no title (Date to be confirmed)

HIDE FILTERS

First Name Last Name User ID

Status
All

Filter

Results per Page: 25

Showing: 1 - 2 of 2

Bulk Action

Participant	Date	Deadline	Overall Status	Overall Status Change
<input checked="" type="checkbox"/> U1 u1 (U1)	Enrolled on Oct 20, 2017 11:44 AM CST	Date to be confirmed	NOT STARTED	---
<input checked="" type="checkbox"/> U2 u2 (U2)	Withdrawn on Oct 20, 2017 11:44 AM CST	Not Applicable	DROPPED FROM WAITLIST	---

Send E-mail

Send Enrollment Confirmation

Re-enroll to alternative session

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:

Catalog Editor

Module Properties
Session Properties

"tester" test äöüß (EKP000000740)

Select an event status:
Active

Select a session:
Date to be confirmed (None Assigned)

Go

Session Setup - the following steps help you to define a session.

1. Edit session
2. Edit session class schedule
3. Enrollment Restriction
4. Enter cost information
5. Enter references
6. **Participants**
7. Instructors
8. E-mail Preferences Setup
9. Cost Accounting Information
10. View usage statistics
11. Checklist
12. Course Coupon
13. Resource Reservation
14. Define Session Security
15. Associated Programs
16. Tin Can API

Showing: 1 - 11 of 11

Bulk Action

Participant

MANAGER /

FOX Adam (ADAM FOX)

WOODLEY Adam (ZCORP_ADAM)

Following users will NOT be re-enrolled

Participant	Reason
PARKER Alex (ALEX.PARKER)	The user has already an active enrollment in this module.

Enroll Cancel

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.

Edit instructor list for CLASS-001 (CLASS-001)

CLASS-001 (Oct 1, 2013 9:00 AM - Oct 3, 2013 3:00 PM)

Default Instructors

The following users are the default instructors for newly added classes. You can change these or add other instructors for every class if required by clicking on the class in the list.

☒ Manual Assignment

Select instructors...
Remove instructors

Instructor Configured

DUOH Veerle (DUOH)

☐ Dynamic Assignment

Automatically assign instructors for this session based on competency qualifications. Enter one or more competency levels that a user must have to qualify as an instructor for this session.


Search and add instructor competency qualification.

Competency	Required Level
There are no items to display.	

Instructor Assignment for Scheduled Classes

Oct 1, 2013 9:00 AM To Oct 1, 2013 5:00 PM At Unassigned
DUOH Veerle (DUOH)

Oct 2, 2013 5:00 PM To Oct 3, 2013 3:00 PM At Unassigned
DUOH Veerle (DUOH)

[Send Instructor Notifications](#) 

Instructor Assigned to Class Notifications will be sent to all Manually Assigned Instructors and those that have been assigned to Scheduled Classes

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

The screenshot shows the 'Catalog Editor' window. On the left, the 'Session Properties' tab is active, displaying 'Sales Product Training Workshop (MOD-0005)'. Below this, there are dropdowns for 'Select an event status:' (set to 'Active') and 'Select a session:' (set to 'Product Workshop, Oct 13, 2012 9:00 AM'). A 'Go' button and several icons are present. A list of steps for session setup is shown, with '13. Auto-Enroll' highlighted in a red box. Below this list, a note about session utilities is visible. The main area on the right is titled 'Auto-Enroll Properties' and shows the event title 'Sales Product Training Workshop (Oct 13, 2012 9:00 AM - Oct 14, 2012)'. It includes fields for 'Auto-Enroll Targeting' (set to 'Inactive'), 'Activation', 'Valid From' (with a date picker), 'Valid To' (with a date picker), and a checkbox for 'Allow offline auto-enrollment'. Below these are three sections for defining user groups: 'Users/Organization/Role', 'User Group', 'Role', and 'Logical Domain', each with a text input area and a 'And with' label.

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.

Catalog Editor

Group Enrollment

English1 (Sep 20, 2013 9:00 AM - Sep 23, 2013 2:00 PM)

Group Enrollment Selections

Use the selection option below to select multiple users to whom you want to assign this LP/module. You must **EXPLICITLY** execute the enrollment action using the "Execute Group Enroll" button below for the enrollment action to be performed.

NOTE: Enrollment policies are ignored when users are enrolled through the group enrollment function. Even if enrollment policies apply for this learning object, the chosen users will be enrolled directly into the course.

Select participant(s)

Select participant(s)
Remove participant(s)

Action allows you to specify enrollment or withdrawal processing for the selected users.

Action: Group Enrollment

Group enrollment management typically includes automated e-mails that are sent to each user. Here, you can suppress the sending of these e-mails for this action.

Suppress automatic e-mails? ☐

Override the recipients in the automatic e-mails with following e-mail address:

Override allows you to bypass all normal validity checking (start date, event status, ...) in executing an enrollment. This capability should be used with caution!

Override? ☐

Cost Center to Charge When Group Enrollment Executes

Charged Cost Center

Execute group enroll

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:

Group Enrollment English1 (11111)

To minimize the overall performance impact on other online users, the processing rate is intentionally slowed to one per second.

Participant Name	Enrollment Processing Status
DELEON Angelo (44444444)	You are already enrolled in this module or program.
SANTIAGO Claire (ABCDE)	You are already enrolled in this module or program.

Close 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.

Knowledge Center

Java Workshop

[Main](#)
[Reference Resources](#)
[Exams](#)
[Certification Exam](#)
[Personal Notebook](#)
[Evaluate this Program](#)
[Discussion Forum](#)
[Chat Room](#)
[File Share Area](#)

[Contact My Learning Group](#)
[Learning History](#)
[Peer Comments](#)

No news announcements are assigned to this learning module at this time, but updates are always in process, so be sure to check back.



Learning Module	Date	Venue	Learning Types
Java Workshop	May 4, 2009 9:00 AM SST - May 8, 2009 5:00 PM SST (Calendar)	None Assigned	Classroom

A direct status change is not allowed for this program/module.

This learning activity currently has an overall status of **ADMINISTRATIVE ENTRY**

Classroom -- Your instructor will mark your course "complete" if you have met all the requirements and it will be moved to the "Records/Transcript" tab.

The completion of the course evaluation is required to set this learning activity to an overall status of COMPLETED.

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

Module Properties

Session Properties

Business Integrity (MOD-1004)

Select an event status:

Active

Select a session:

2019 Winter Session, Dec 12, 2019 9:00 AM (None As)

Go

Session Setup - the following steps help you to define a session.

[1. Edit session](#)
[2. Edit session class schedule](#)
[3. Enrollment Restriction](#)
[4. Enter cost information](#)
[5. Enter references](#)
[6. Participants](#)
[7. Instructors](#)
[8. E-mail Preferences Setup](#)
[9. Cost Accounting Information](#)
[10. View usage statistics](#)
[11. Checklist](#)
[12. Resource Reservation](#)
[13. Define Session Security](#)
[14. Associated Programs](#)
[15. Tin Can API](#)

Session Utilities - before you use these utilities, please save any changes you have made.

[16. Auto-Enroll](#)
[17. Group Enroll](#)
[18. Group Training Plan](#)
[19. Knowledge Center Preview](#)

Clone Session

Business Integrity (Dec 12, 2019 9:00 AM - Dec 14, 2019 5:00 PM)

Event Status

Active

☒ Automatically adjust enrollment start and end dates
☒ Automatically adjust homework due date
☒ Automatically adjust date specific deadline

☒ Repeat
 Monthly

on Day

12

On or Until

Nov 4, 2020 9:00

Clone

Save Options

One or more sessions have been set to active and New Sessions Available Notifications may be sent to learners who have indicated interest depending on enrollment policy settings.

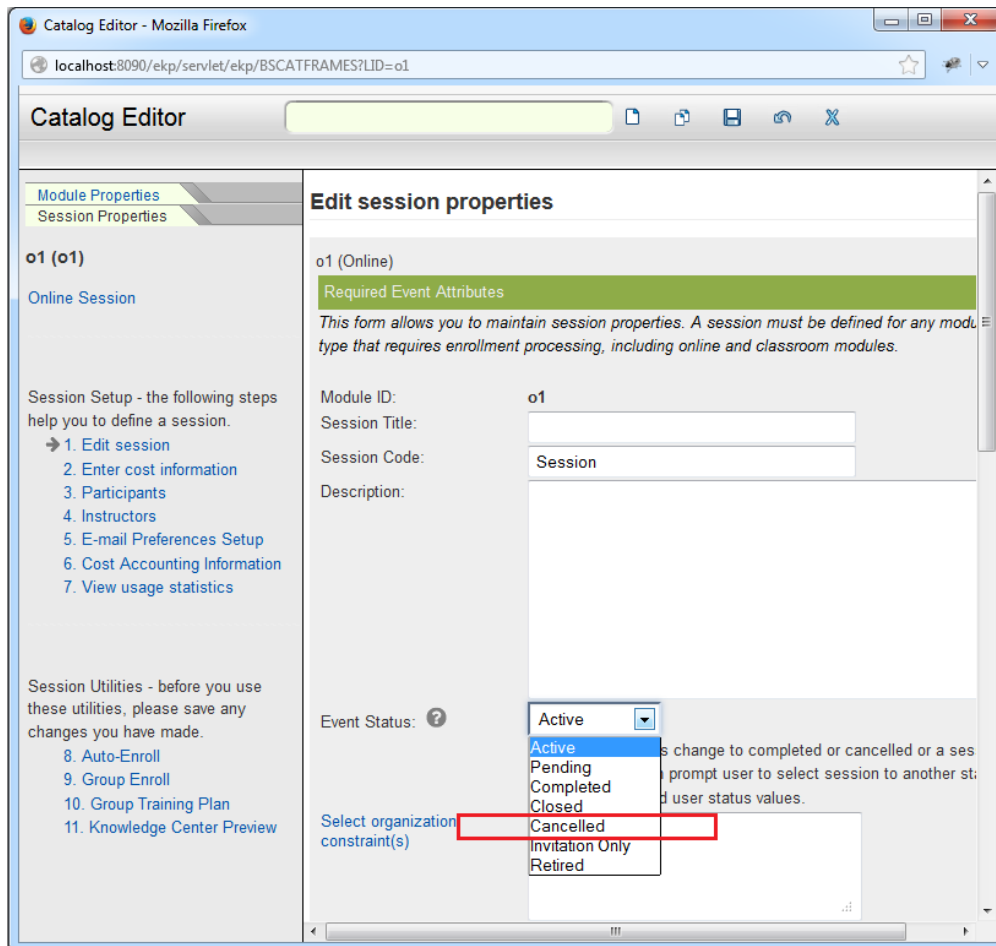
☒ Send each learner a notification per session
☐ Send each learner a single notification per module
☐ Do not send notifications

Submit

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

Instructor Deassigned from Class Email Template:	Instructor Deassigned from Class E-mail Template	9.3
Session Cancelled E-mail Template to be sent to Participants:	Default Session Cancellation Email	9.3
Session Cancelled E-mail Template to be sent to Instructors:		9.3
Certification		
Default date format	dd-MMM-yyyy	9.0

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.

E-mail Template Editor

Templates

- System Default
 - Default Certification Expiration Reminder
 - Default Course Withdrawal Notification
 - Default Enrollment Approval Reminder
 - Default Enrollment Approval Request
 - Default Enrollment Approved Notification
 - Default Enrollment Confirmation
 - Default Enrollment Denied Notification
 - Default Enrollment Pending
 - Default Enrollment Waitlisted
 - Default Session Cancellation Email
 - Default Session Changed Email
 - Default Session Transfer
 - Default Start-of-Session Reminder
- User Templates

ENGLISH (Default) SIMPLIFIED_CHINESE TRADITIONAL_CHINESE JAPANESE KOREAN
 GERMAN SPANISH DUTCH FRENCH TRADITIONAL_CHINESE_HK ITALIAN POLISH
 GREEK PORTUGUESE PORTUGUESE_BR SPANISH_MX ARABIC MALAY THAI
 ENGLISH_UK ENGLISH_CA CZECH DANISH FINNISH RUSSIAN VIETNAMESE
 HUNGARIAN SLOVAK HEBREW TAGALOG INDONESIAN ENGLISH_US SERBIAN
 ESTONIAN Add new language

Save Create a copy Cancel Usage Delete all

Name: Default Session Cancellation Email

Sender: Specify the sender of the e-mail.

Recipients: Select from the list below the intended recipients for this message.

	To	CC	Omitted
Approver	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Participant	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Direct Appraiser	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
HR Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Course Specific Instructor(s)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Default System Approver	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Default System User/Administrator	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Appraiser	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Super-Appraiser	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Organization Approver	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Specific User	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

E-mail Template Editor

Organization Approver ☐ ☐ ☒

Specific User ☐ ☐ ☒

External E-mail: Messages may be sent to one or more external e-mail addresses. Use comma (,) to separate multiple addresses.

Message: Enter a new message or select text from one of the predefined messages (the text may be altered for this specific message). Substitution parameters are indicated as {keyword...} text and others may be added using the drop-down list below.

Language: English

Predefined Message: Default Enrollment Approval Reminder

Subject: Notification of Course Cancellation

NOTE: For security reasons, the external approval link is shown in CC user e-mails.

The course (course title), which you were enrolled in, has been cancelled. If you require any further assistance, please contact the instructor or system administrator.

Parameters: Additional Charges Append to Message

Attachments: Select an attachment from the repository. Assign attachment

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:

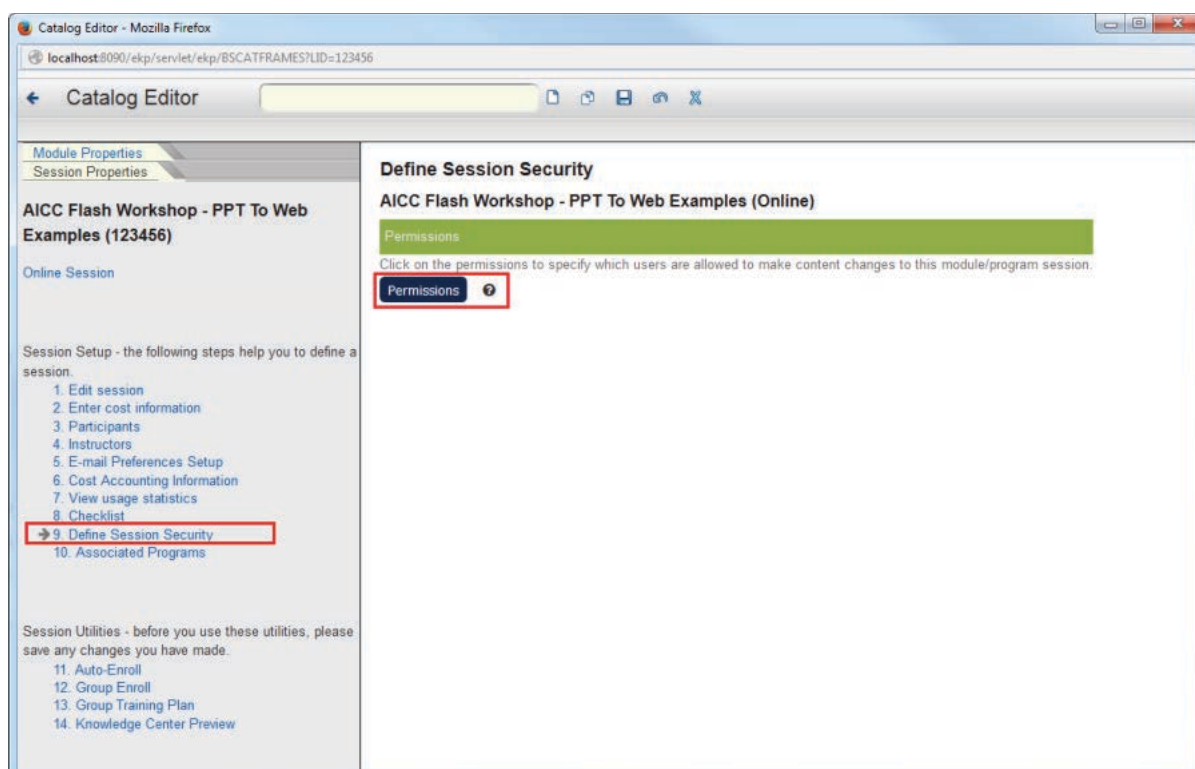
1. The approval request expires or is denied

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:

Teach

Active Courses Archive Session Administration

Module Title/ID/Description Venue Region

Start Date End Date

Date 0 00 Date 0 00

Search

Results per Page: 25

Showing: 1 - 4 of 4

Module Title (ID)	Session Title	Session Status	Start Date	End Date	Seats Registered	Remaining/Total Seats
Classroom2 (MOD-0015)		Active	Nov 30, 2013 9:00 AM CST	Dec 25, 2013 5:00 PM CST	3	Unlimited
		Active			2	Unlimited
		Active			3	Unlimited
		Active			2	Unlimited

[Review Participants](#)
[Launch Knowledge Center](#)
[Launch Module Properties](#)
[Launch Session Properties](#)
[View Course Details](#)
[Download Attendance Sheet](#)

Cloning Sessions

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

Clone Session

NETD CLASSROOM (Feb 29, 2016 9:00 AM - Feb 29, 2016 5:00 PM)

Event Status

Pending ▼

- ☒ Automatically adjust enrollment start and end dates
- ☒ Automatically adjust homework due date
- ☒ Automatically adjust date specific deadline

☐ Repeat

Daily ▼

On or Until

Date



9 ▼

00 ▼

Clone

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

☒ Repeat

Daily ▼

Daily

Weekly

Monthly

Date



9 ▼

00 ▼

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".

on Day

11 ▼

1

2

3

4

5

6

7

8

9

10

11

12

13

14

15

16

17

18

19

20



9 ▼

00 ▼

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**:

The screenshot shows the 'Catalog Editor' application window. On the left, the 'Session Properties' sidebar is visible, with '14. Group Training Plan' selected. The main content area is titled 'Group Training Plan Assignment'. It includes a section for 'SI2 for Initiating agents (Date to be confirmed)' with a 'Group Training Plan Assignment Selections' box. Below this is a 'Select participant(s)' field. The 'Action' dropdown is set to 'Assign this Module'. There is a checkbox for 'Update Existing Plans' which is checked. A 'Notification Email' field is present, along with a 'Comment (max. 255 characters)' text area. The 'Priority' dropdown is set to 'Medium', and the 'Complete By' field is '(not specified)'. At the bottom, there is a blue button labeled 'Execute Group Plan Assignment'.

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.

Priority: Medium ▾

Complete By: (not specified)  

Execute Group Plan Assignment

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

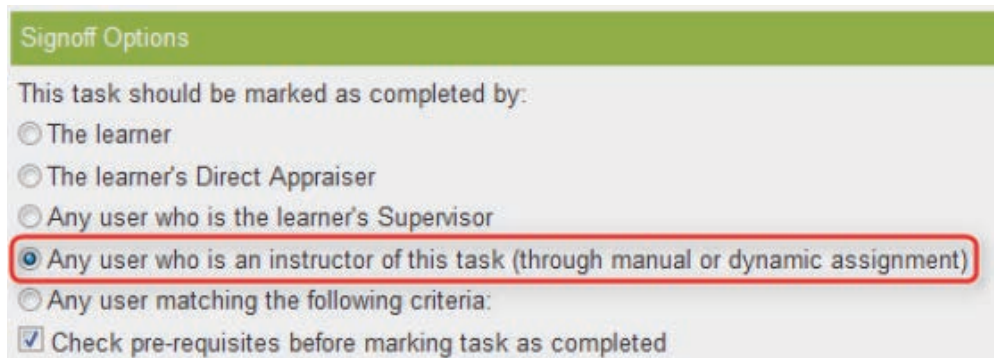
1. Read the machine operation manual
2. Observe demonstration given by a certified trainer
3. Duty manager confirmation for skills acquired

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:



Signoff Options

This task should be marked as completed by:

- ☐ The learner
- ☐ The learner's Direct Appraiser
- ☐ Any user who is the learner's Supervisor
- ☒ Any user who is an instructor of this task (through manual or dynamic assignment)
- ☐ Any user matching the following criteria:

☒ Check pre-requisites before marking task as completed

Task Complete Reminder

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

Catalog Editor

Listing...
Module Properties
Session Properties

TASK-001 (TASK-001)

Online Session

Session Setup -- the following steps help you to define a session.

1. Edit Session
2. Participants
3. Instructors
- 4. E-mail Preferences Setup

Session Utilities -- before you use these utilities, please save any changes you have made.

5. Auto Enroll
6. Group Enroll
7. Group Training Plan
8. Knowledge Center Preview

Configure an e-mail to be sent if a user on the waitlist gets enrolled when someone else withdraws from the course

E-mail Message Name:

Notification of Waitlisted Participants Withdrawn by System

If the session no longer allows participant withdrawals, the system will automatically withdraw waitlisted participants. Here you can specify the template for the e-mail that is sent to notify participants that they have been withdrawn by the system. Please note that this cannot be used for learning programs.

E-mail Message Name:

Escalation of Completion Reminder

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

E-mail Message Name:

Frequency:

days after enrollment before initial reminder:

Task Complete Reminder

Configure an Email template to let a learner able to send reminder to the person who can mark this task complete

E-mail Message Name:

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.

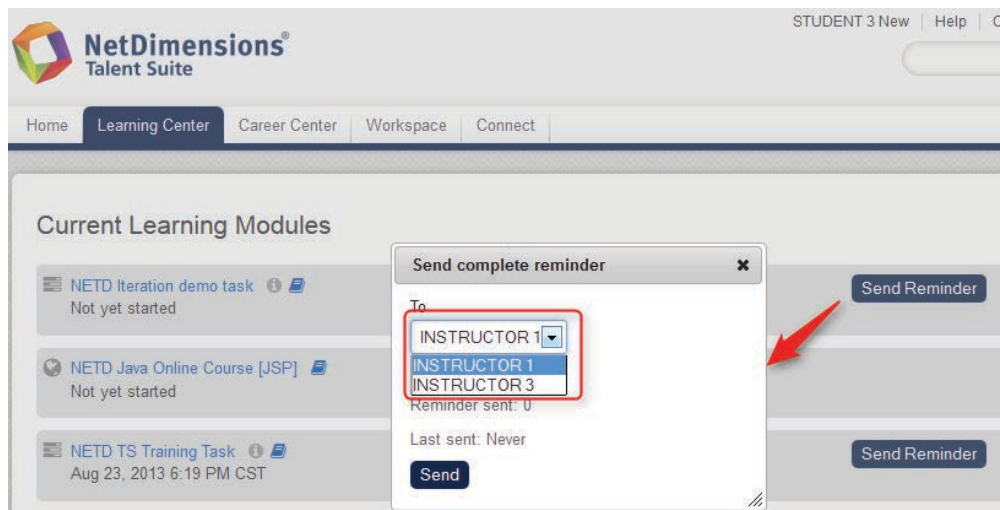
Current Learning Modules

Refresh your current course list showing on this page.

[Back](#)

TASK-002 (TASK-002) Not yet started 0 credits	0% Total time: 00:00:00 Send Reminder
TASK-001 (TASK-001) Not yet started 0 credits	0% Total time: 00:00:00 Mark As Completed

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**:

Task Approval

Task Status: Pending Sign Off | Approver's Role: All | First Name: | Last Name: | Task Title: | ☐ Tasks with Reminder | Filter

Results per Page: 25

Task Title	Employee	Enrolled on	Approver's Role	Marked as Completed on
NETD How to Setup PC Task	STUDENT 1 New (U1)	Oct 7, 2013 10:02 AM	Instructor	
Task	ADMINISTRATOR System (NDADMIN)	Sep 11, 2013 5:04 PM	Instructor	
Task	ADMINISTRATOR System (NDADMIN)	Sep 11, 2013 5:04 PM	Instructor	

Approve Task
Launch Course
Reference Resources

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".

Catalog Editor

Learning Program Session Module Assignment

Program 1

Session Maintenance

Enter a new ID to create a new session for this learning program. After a session is created, modules can then be assigned.

New Session ID: **Create new session**

The session is currently assigned to this learning program.

Session ID	Assigned module	Status	Action	Order
Session1	0	New		0
Session2	0	New		0

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" checkbox is available under the "Session Module Assignment" section Catalog Editor > Session Properties

Learning Program Session Module Assignment

Session Module Assignment

☐ Modules cannot be accessed until all preceding modules are completed

☒ Program completion requires modules to be on Effective/Approved revision

Required Credits for Elective Modules:

☒ Use predefined credits

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.

Catalog Editor - Mozilla Firefox

localhost:8090/ekp/servlet/ekp/BSCATFRAMES?InternalLID=EKP000000412

← Catalog Editor

Module Properties
Session Properties

Program_7493 (MOD-0411)

Select an event status:
Active

Select a session:
Session1 (Session1)

Go

Session Setup - the following steps help you to define a session.

1. Assign Module
2. Enrollment Restriction
3. Enter cost information
4. Enter references
5. Define Session Approver
6. Participants
7. Assign session instructor
8. E-mail Preferences Setup
9. Cost Accounting Information
10. View usage statistics
11. Checklist
12. Define Session Security
13. Associated Programs
14. Tin Can API

Session Utilities - before you use these utilities, please save any changes you have made.

15. Auto-Enroll
16. Group Enroll
17. Session Enrollment Update
18. Knowledge Center Preview

Session Enrollment Update

Program_7493 (MOD-0411) (Session1)

☒ Update current program session enrollments. ?

☐ Re-enroll users who have previously completed the program session. ?

☐ Only re-enroll if user's current job profiles include this program.

☒ Check here if you want to send an e-mail update notification to each affected user.

Execute session update

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.

Session Enrollment Update

3shape (SC-696)

Participant Name (ID)	Update status
ANG janelle	✓ Enrollment Updated

No learners requiring re-enrollment detected

Close

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:

Share/credit enrollment ⓘ

Where a component module/program or its equivalent has been completed by the learner prior to enrolling onto this program, program completion

☒ Requires the learner to retake the learning
☐ Does not require the learner to retake the learning

Validity of Learning day(s)

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

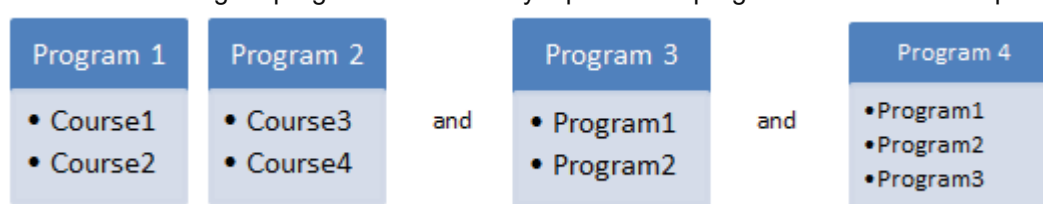
Apart from assigning modules/program(s) to a learning program, selecting a program session is also made possible. This means that once a program is assigned, appropriate session can be selected from the given selection. Although there are restrictions to the programs that can be made available for selection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

[HOME](#)
[TRAINING RECORDS](#)
[CATALOG](#)
[CAREER DEVELOPMENT](#)
[COMMUNICATE](#)

Pending Enrollments

Pending enrollment requests are listed below, click on the Enrollment Status to check the progress of the approval.

Learning Program/Module	Learning Type	Date	Overall Status
P1	Program	Date to be confirmed	Pending Approval

[Back](#)

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.

Enrollment Successful

Your enrollment was successful!



Please examine your e-mail messages for any pre-class instructions.

[Go to Course Sessions](#)

Enrolling Onto Composite Programs

Enrolling onto a composite program 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.



Gammon Sample

by Unknown

[0 Reviews](#) [Session](#)

Learning Type: Program
Subject: General Skills
Language: English
Objectives:
More Information:
Wiki Link:

Click on the Enroll Now button to enroll on the complete group of learning modules listed below.

Sessions: [Gammon Sample - Dec](#)

Seats: Unlimited

Enroll

- [Reveal.js test](#)
- [Risk Management](#)

[Gammon Sample - Sept](#)

Seats: Unlimited

[Basic Selling Skills](#)

This course must be completed by Jul 31, 2012 8:00 PM CDT

[Show more info](#)

[Business Writing](#)

[Show more info](#)

[Effective Communication](#)

[Show more info](#)

[Course evaluation](#)

- 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.

Enrollment Successful

Your enrollment was successful!

 Gammon Sample
 Risk Management
 Reveal.js test



Please examine your e-mail messages for any pre-class instructions.

[Go to the Knowledge Center](#)

- 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

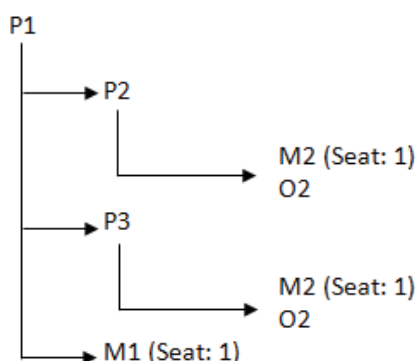
Accessing Composite Programs after Enrollment

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 enrolls 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, learner2 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 be 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.

Catalog Editor

Listing...
Module Properties
Session Properties

College_English_ (ENG10_1)

Select an event status:
Active

Select a session:
College English Session 1, Date

Go

Session Setup -- the following steps help you to define a session.

→ 1. Edit Session

2. Edit Session Class Schedule

3. Enter Cost Information

4. Participants

5. Instructors

6. E-mail Preferences Setup

7. Cost Accounting Information

8. View Usage Statistics

9. Session Transfer

10. Resource Reservation

Course Specific Approver #2:

Comments:

Enrollment Limits: Min: Max: ☐ Fixed ☒ Based on facility size/capacity

Total Enrollment #: 1

Cannot withdraw within: 0 days of the start date

Waitlist Handling: Automatic Upgrade

Duration(Training hours): Automatic Upgrade

Institution: Manual (Administrator) Upgrade

Enrollment Begin Date: Waitlist All Learners

Enrollment Deadline: (not specified) 20 00

Due date of Homework: (not specified) 20 00

Module Completion Deadlines

☒ None

☐ Days from Enrollment 0 (0 implies unlimited)

☐ Date Specific Deadline (not specified) 20 00

☐ Enforce deadline and have participant statuses automatically set to DEADLINE EXPIRED if they do not complete the module in time.

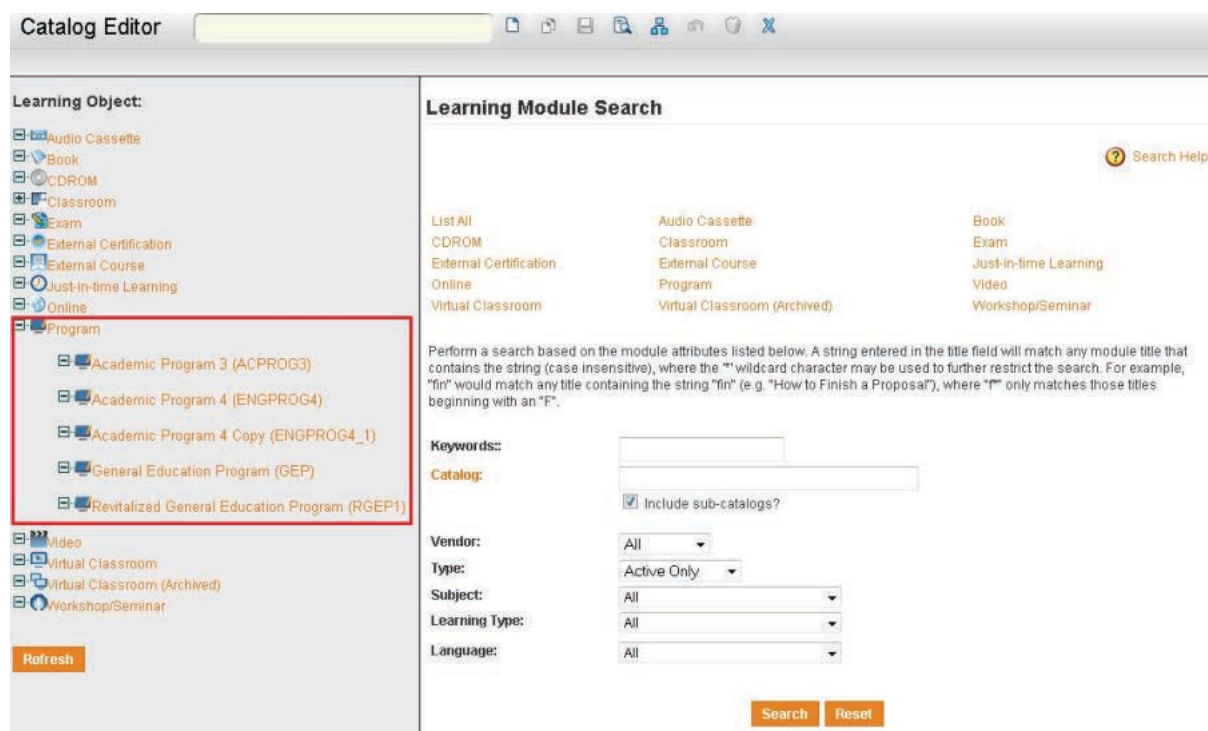
View Participant Deadlines

Deleting Programs

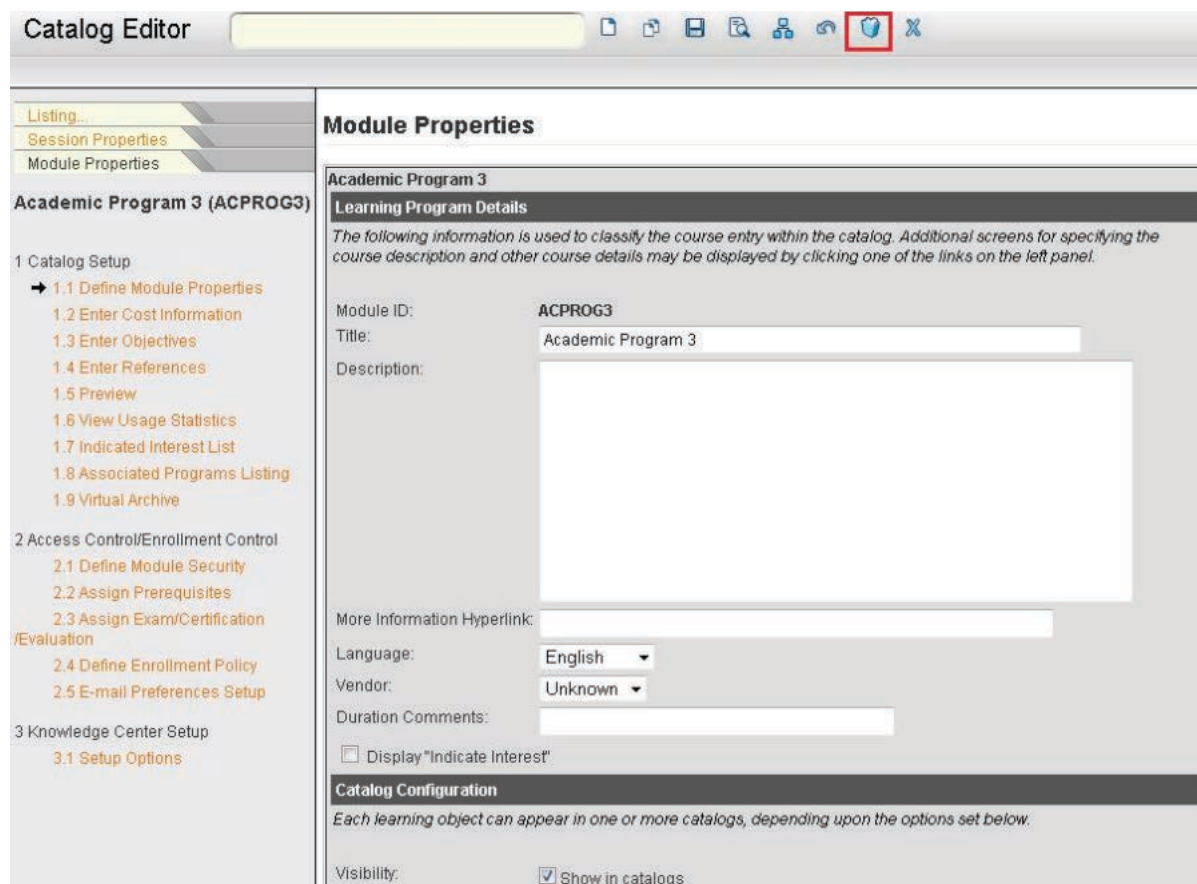
Deleting a program will permanently remove:

- 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.

Assigned module	Weighting	Order	Event Date	Credits	Required	Auto
Sub-Program 10.0 (subprogram93)	0.0	0	1 ▾	0.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Online Course 10.0 (online93)	0.0	1	Online	0.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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**:

Session Module Assignment

☒ Modules cannot be accessed until all preceding modules are completed. ?

☒ Allow learner to advance to next order on failing preceding learning

☐ Hide modules blocked by preceding modules in Learner's Available Modules

☐ Program completion requires modules to be on Effective/Approved revision

☐ Modules cannot be accessed until their prerequisites are fulfilled ?

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

The screenshot shows the 'Catalog Editor' interface in Mozilla Firefox. The left sidebar contains a list of steps for session setup, with '1. Assign Module' highlighted. The main area displays 'Session Properties' for 'ProgramT (ProgramT)'. A dropdown menu shows 'Session1 (Session1)'. Below this is a table of assigned modules:

Assigned Module	Weighting	Order	Session	Deadlines In This Session	Credits	Required	Auto
002 (MOD-0107)	0.0	0	Online	No deadline ... Own: No deadl...	0.0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Below the table, the 'Passing Score' is set to 0.0. A red box highlights the following section:

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 module within the context of this program

Below this is the 'Additional Session Attributes' section, which includes a dropdown for 'sdfs22' (set to 'Not Assigned') and a text input for 'Session Attribute Name1' (containing 'ssss'). At the bottom, there is a 'Workflow Assignment' section with a dropdown for 'Template' (set to 'Please select.') and a checkbox for 'Disable workflow assignment for this session'.

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:

Associated Programs

Online1 (Online)

This session has been assigned to following programs:

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.

Progress Tracking Deadline Update

For Assigned Modules In Program1

ClassroomT

Participant Name (ID)

ONE User

TWO User

THREE User

Close

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**

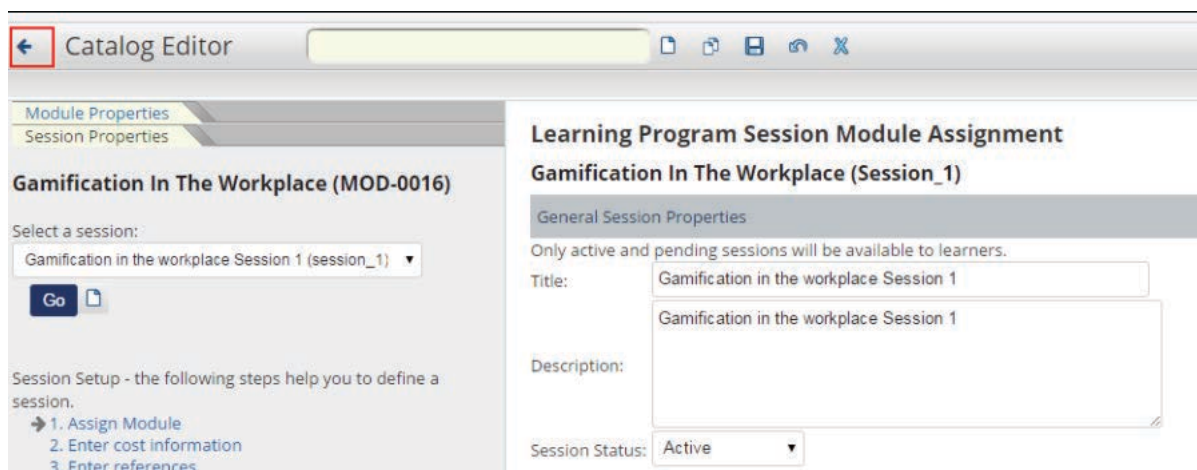
The " **Update Deadline of Users** " option can be accessed in the gear icon in both locations. The progress indicator and the pop-up screen showing status updates are available in this level as well.

The first screenshot shows the 'Catalog Editor' interface with the 'Module Properties' tab selected. The 'Associated Programs' section for 'Online1 (MOD-0000)' is displayed. A table lists associated programs with columns: Module Session, Program Title (ID), Session Title (ID), Session Status, Weighting, Order, Credits, Required, Enrollment, and Progress Tracking Deadline. A gear icon is visible next to the first row. A context menu is open, showing options: View Program Module Properties, View Program Session Properties, Session Enrollment Update, **Update Deadline of Users** (highlighted with a red box), Edit Association, and Remove Association.

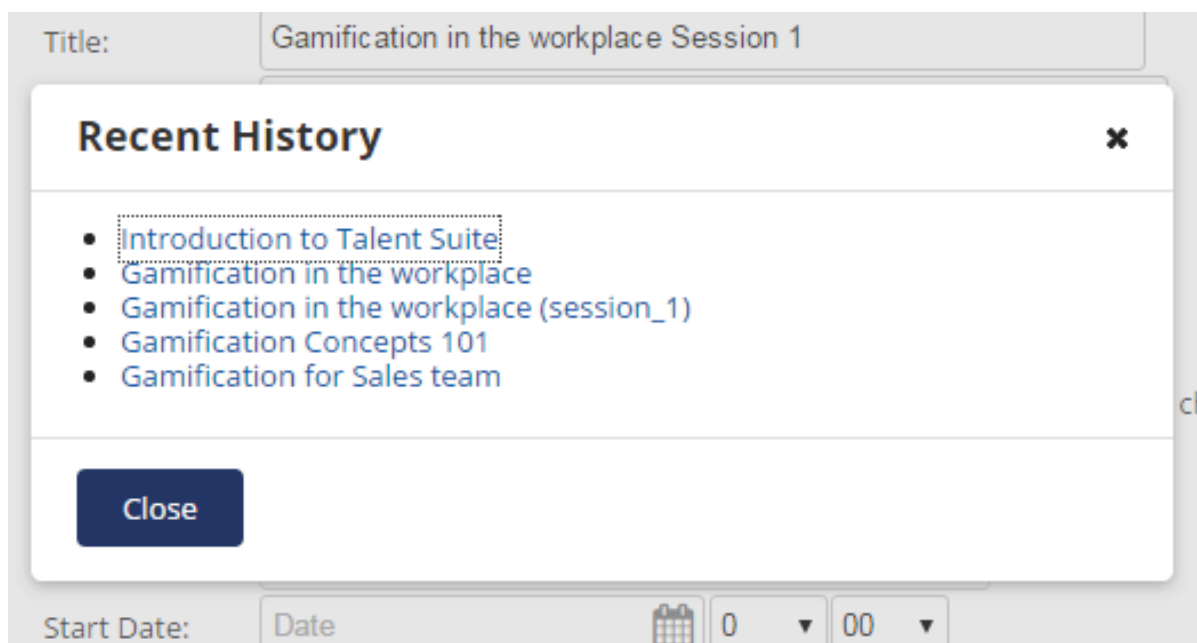
The second screenshot shows the same interface, but the 'Bulk Action' dropdown menu is open, showing options: Bulk Action, Session Enrollment Update, **Update Deadline of Users** (highlighted with a red box), Recourses, Edit Associations, and Remove Associations.

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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Programa en Varios Idiomas	0.0	0	Session1	No deadline (Inherited) Own:Aug 28, 2015 ...	0.0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Module C	0.0	1	Online	No deadline (Inherited) Own:No deadline	0.0	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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**.




Manage Center

[Overview](#)
[Learning](#)
[Talent](#)
[Communicate](#)
[Users](#)
[Reports](#)
[System](#)

Import content package

Select A Package

The following content package formats are supported.

- SCORM 1.2 or 2004 content package
- AICC content package
- Tin Can content package
- .ZIP file containing one or more SCORM or IMS content packages
- .ZIP file containing one or more sets of AICC course structure files (where each set of AICC course structure files must consist of four files with the same base file name and the file name extensions .au , .crs , .cst , and .des , respectively)

No file chosen

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**.

[Home](#)
[Overview](#)
[Learning](#)
[Talent](#)
[Communicate](#)
[Users](#)

Import content package

[Select A Package](#) ›

Edit Module ID

For Module Org Title

Module ID

✓ The ID is new and valid.

☒ Update catalog setting

☐ Show in catalog

[Assign catalog](#)

[Remove assigned catalog\(s\)](#)

☒ Use Rustici Engine ?

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).

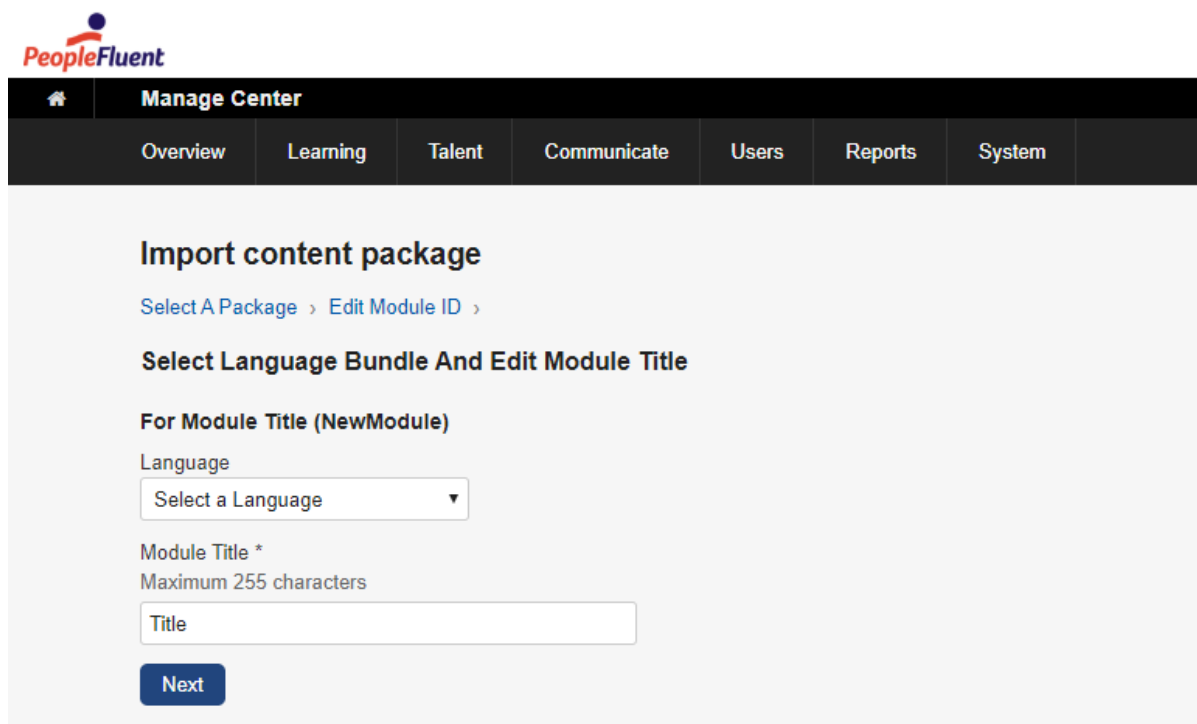
To remove the course from its assigned catalog(s), click the **Remove assigned catalog(s)** link.

To show the course to learners when they search or browse catalogs, select the **Show in catalog** check 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.

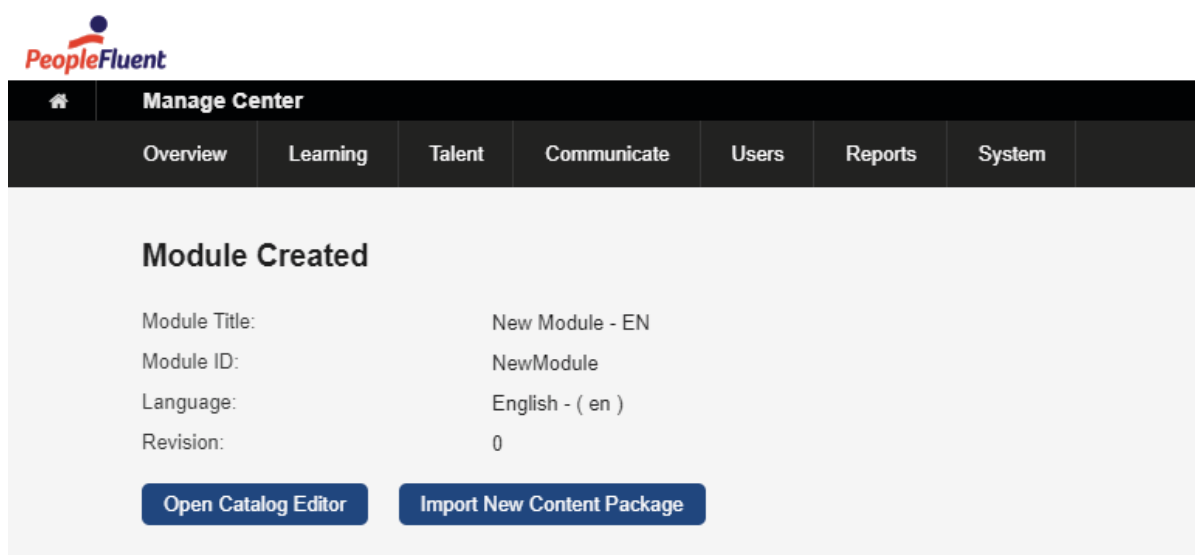
Select a language and edit the module title



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.

Import content package

[Select A Package >](#)

Batch Update Options

The package "Multiple SCORM Courses.zip" contains 2 course(s).
 Title (scorm.manifest.course1)
 Title (scorm.manifest.course2)

What do you want to do with the courses in this package?

☒ Import courses

☐ Delete existing modules with IDs matching those in the package (useful for undoing the effects of a previous import; also deletes associated training records)

How do you want the system to select IDs for the courses in this package?

☒ Use IDs specified in the course descriptions

☐ Use the base file names of the source files

You can specify a prefix that will be prepended to each online module ID. This can be useful if you need to import multiple copies of the courses in a package.

Prefix:

[Next >](#)

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




Manage Center

[Overview](#)
[Learning](#)
[Talent](#)
[Communicate](#)
[Users](#)
[Reports](#)
[System](#)

Import content package

[Select A Package](#) > [Select Batch Update Options](#) >

Batch Import Details

Learning Module Details

Language:

Catalog Configuration

☒ Show in catalog
[Assign catalog](#)

[Remove assigned catalog\(s\)](#)


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** checkbox. If you leave this checkbox 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.




Manage Center

[Overview](#)
[Learning](#)
[Talent](#)
[Communicate](#)
[Users](#)
[Reports](#)
[System](#)

Batch Import Summary

Course	Status
Standard US (scorm.manifest.course1)	Imported as SCORMCourse1
Standard US (scorm.manifest.course2)	Imported as SCORMCourse2
2 imported, 0 failed, 2 total	

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**.

For Module Title

Module ID

☒ The ID already exists.

☒ Update catalog setting

☒ Show in catalog

[Assign catalog](#)

[Remove assigned catalog\(s\)](#)

Default Public Catalog

[Update Existing Bundle Revision](#) [Import As New Bundle](#)

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** checkbox, 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** checkbox. If you leave this checkbox unselected, the course will not be shown to learners.

Course Revision Language Options

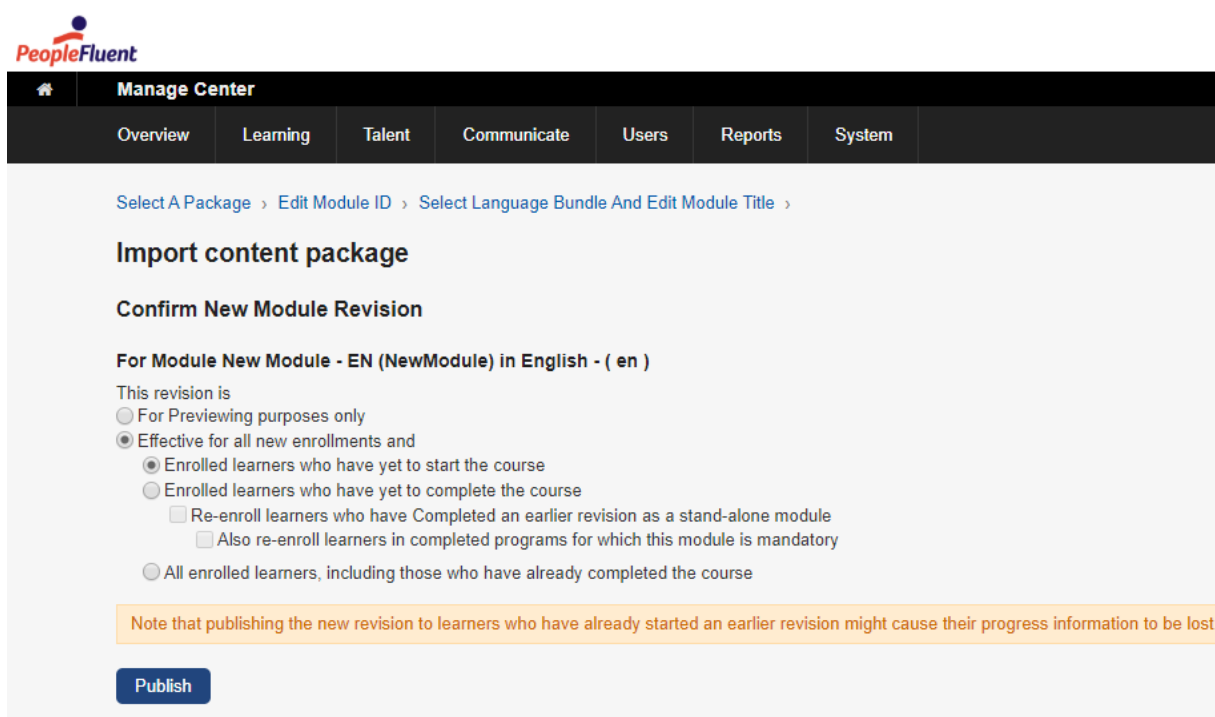
When you import course packages you select the language of the course you are creating or updating:

- 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 screenshot shows the PeopleFluent Manage Center interface. The top navigation bar includes links for Overview, Learning, Talent, Communicate, Users, Reports, and System. The main content area is titled 'Import content package' and 'Confirm New Module Revision'. It displays the module name 'For Module New Module - EN (NewModule) in English - (en)'. Below this, there are radio button options for the revision's scope: 'For Previewing purposes only', 'Effective for all new enrollments and' (selected), and 'All enrolled learners, including those who have already completed the course'. Under the selected option, there are checkboxes for 'Enrolled learners who have yet to start the course' (selected), 'Enrolled learners who have yet to complete the course', and 'Re-enroll learners who have Completed an earlier revision as a stand-alone module' (unchecked). A note at the bottom states: 'Note that publishing the new revision to learners who have already started an earlier revision might cause their progress information to be lost.' A 'Publish' button is located at the bottom left.

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 **Allow 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**.



Manage Center

Overview Learning Talent Communicate Users Reports System

Import AICC course structure

Import AICC course structure

Select the AICC course structure files, then click Next.

Assignable Unit (.AU) File: No file chosen

Course Description (.CRS) File: No file chosen

Course Structure (.CST) File: No file chosen

Descriptor (.DES) File: No file chosen

Encoding:

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



[Home](#) [Overview](#) [Learning](#) [Talent](#) [Communicate](#) [Users](#)

Import AICC course structure

[Import AICC course structure](#) >

Edit Module ID

For Module AICC Flash Workshop - PPT to web examples

Module ID

☒ The ID is new and valid.

☒ Update catalog setting

☐ Show in catalog

[Assign catalog](#)

[Remove assigned catalog\(s\)](#)

☒ Use Rustici Engine ?

[Import As New Bundle](#)

To show the course to learners when they search or browse catalogs, check the **Show in catalog** checkbox. If you leave this checkbox 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 checkbox 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



[Home](#) [Overview](#) [Learning](#) [Talent](#) [Communicate](#) [Users](#)

Import AICC course structure

[Import AICC course structure](#) > [Edit Module ID](#) >

Select Language Bundle And Edit Module Title

For Module AICC Flash Workshop - PPT to web examples (M01FlashWorksh

Language

Select a Language ▾

Module Title *

Maximum 255 characters

AICC Flash Workshop - PPT to web examples

Next

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](#).