PeopleFluent

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NetDimensions LMS 15.1

Catalog Administration

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

www.peoplefluent.com/products/learning

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Introduction

Catalog and courseware administration involves setting up and managing training catalogs which learners can browse or search for courses to enroll in. There are two types of catalog: those native to NetDimensions LMS, and web catalogs for integration with third-party suppliers such as Skillsoft.

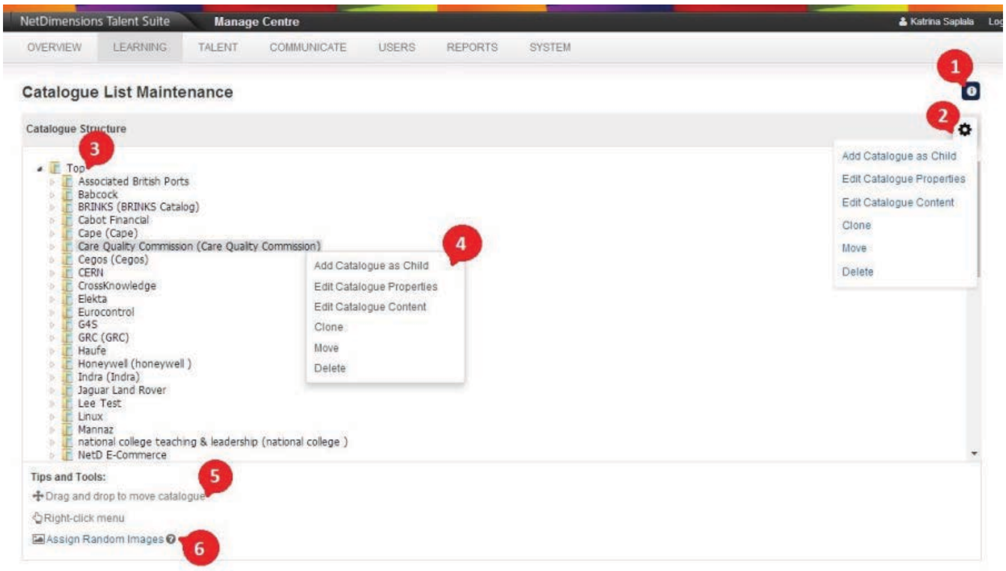
Catalogs

Catalogs are used to organize learning content. For example, you can set up catalogs to group related courses, or to separate content for different groups of users.

Catalogs have permissions to determine who can see them, enabling users to browse training content available to them.

Catalog Creation and Maintenance

To manage catalogs, go to the Manage Center and select **Learning > Catalog General Settings > Catalog List Maintenance**.



From here you can:

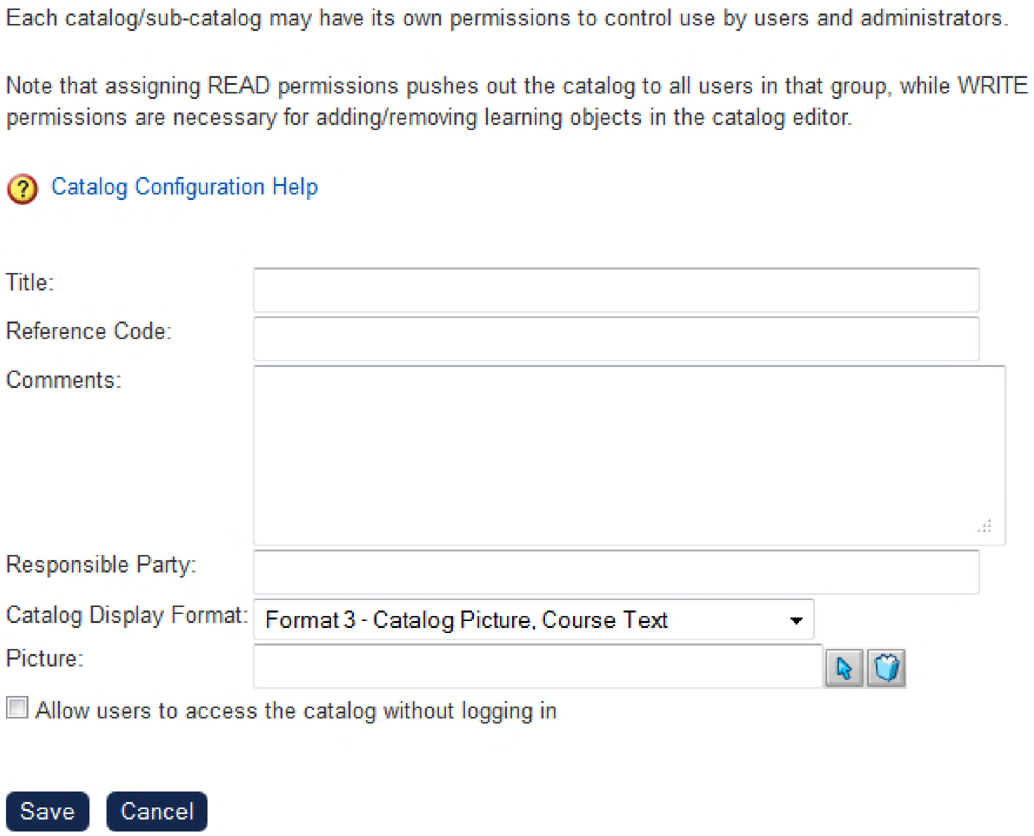
1. Access guidelines for using structured catalogs via the information icon
2. Perform actions (applicable to the currently selected catalog) via an action menu
3. See the catalog structure, expanding and collapsing as necessary
4. Access the context menu per catalog via right click
5. Drag and drop catalogs to reorganize them
6. Randomly assign library stock images to catalogs and courses with no pictures

Catalogs can contain sub-catalogs, which are themselves catalogs that can contain content and have other member sub-catalogs. You can arrange the catalog hierarchy to organize the content and also to restrict access to catalogs to specific user groups.

Configuring Catalogs

1. Select the catalog to edit or where the new child catalog will be added and either click the **Actio n Menu** or the **Context Menu**
    a. To add a new catalog, select **Add Catalog as Child**.
    b. To edit a catalog, select Edit Catalog Properties.

2. Enter the catalog properties.
3. To assign an image to the catalog, either enter a URL manually or select an image from the repository by clicking the Select icon. The recommended size for catalog images is 300 pixels by 300 pixels, other sizes will be scaled to this size.
4. Save.


Each catalog/sub-catalog may have its own permissions to control use by users and administrators.

Note that assigning READ permissions pushes out the catalog to all users in that group, while WRITE permissions are necessary for adding/removing learning objects in the catalog editor.

Catalog Configuration Help

Title:

Reference Code:

Comments:

Responsible Party:

Catalog Display Format: Format 3 - Catalog Picture, Course Text

Picture:

Allow users to access the catalog without logging in

Save Cancel

Catalog Display Format

The LMS offers six different layout combinations for the catalog contents:

- **Format 1 - Catalog Picture, Course Picture:** Catalogs and learning modules are displayed using the assigned images
- **Format 2 - Catalog Text, Course Picture:** Catalogs are presented as a list, learning modules are displayed using the assigned images
- **Format 3 - Catalog Picture, Course Text:** Catalogs are displayed using the assigned images; learning modules are presented as a list.
- **Format 4 - Catalog Text, Course Text:** Catalogs and learning modules are presented as lists.
- **Format 5 (Dynamic) - Catalog Picture, Course Picture:** Catalogs and learning modules are presented using the assigned pictures.
- **Format 6 – Catalog/Course Picture over Text:** Catalog/course picture are displayed over text.

Each catalog has a "display format" setting that controls how the catalog is presented to the user. You can mix and match the display settings for different catalogs/sub-catalogs within the same hierarchy.

The "top" catalog is where it all begins, but for user navigation, selecting a catalog at a higher level than others will NOT show all courses in the underlying sub-catalogs. Only the immediate sub-catalogs and direct courses are typically shown to the users. As a "best practice" for visually stimulating navigation, it is recommended that FORMAT3 be used at the TOP level (large pictures are shown for the catalogs) and FORMAT1 or FORMAT2 (pictures are shown for the courses) for the individual catalogs. A key objective for administrators is to require as few settings as possible. To support this, an "Inherit Permissions" indicator is provided to allow sub-catalogs to be visible to the same users as their parent catalog.

Catalog Permissions

Each catalog may have explicitly set permissions (configured using the PERMISSIONS button). The inherited permissions and the explicit permissions added together determine who can see a specific sub-catalog. Even if inherited permissions are not used, anyone who can see a specific sub-catalog is also granted READ rights to the direct parent hierarchy. Otherwise, a user could not navigate down to the sub-catalog they have explicit permission to use.

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

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

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

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

Controlling Access for Unauthenticated Users

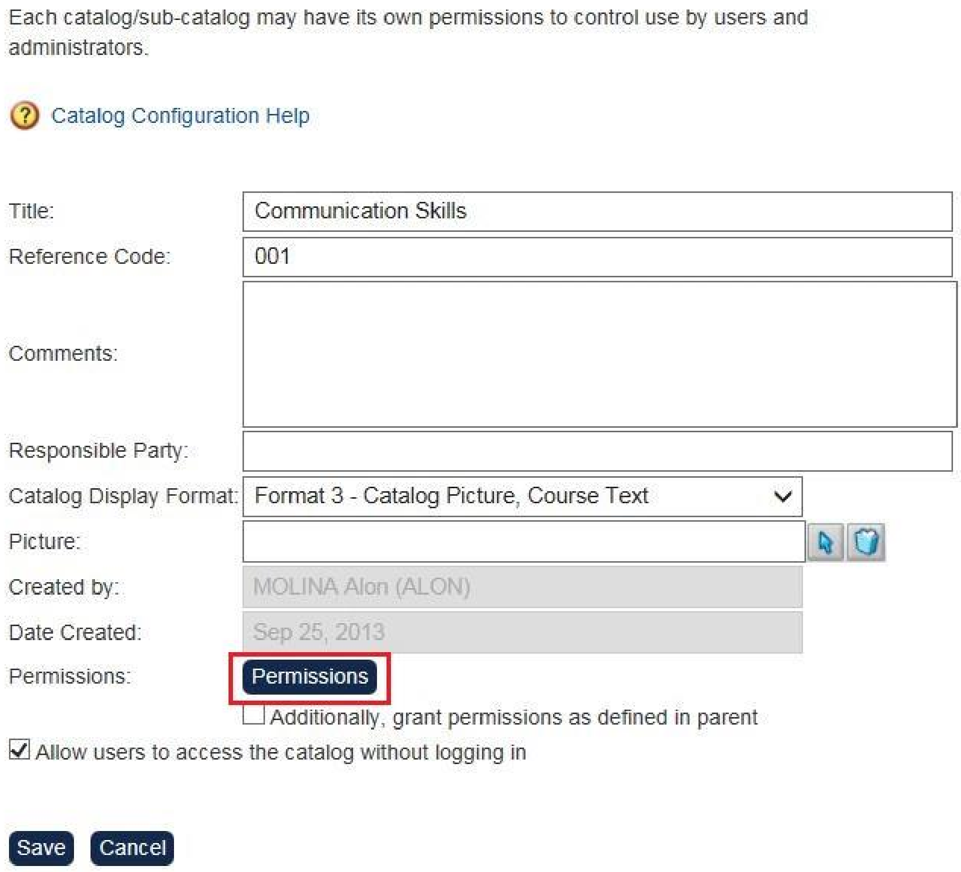
In some cases, you might want to allow users access to catalogs without requiring them to log in. To support this, an "Allow users to access the catalog without logging in" indicator is provided to allow catalogs to be viewable by them. This setting is independent from the permission setting mentioned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

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

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

To assign user permission at the root catalog level:

1. Go to **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.
2. Select the catalog where the permission will be set.
3. Either click the **Action Menu** or the **Context Menu** then select **Edit Catalog Properties**.

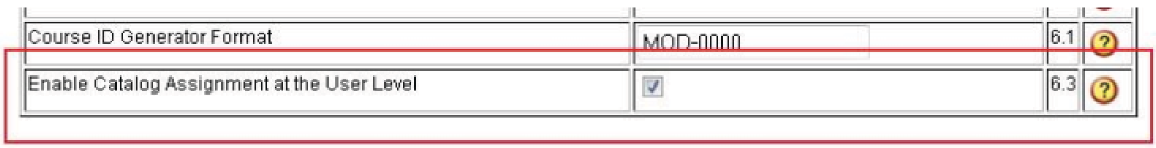


4. Click **Permission** to launch the Permissions Selector
5. There two types of access you can give to a user, namely:
    - **Read Only Access**. Having READ permission means a user can see a Catalog but not perform any action
    - **Unrestricted Write Access**. Having Unrestricted Write Access permission means user can also update/delete a Category

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

Disable the Catalog Assignment in User Editor

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



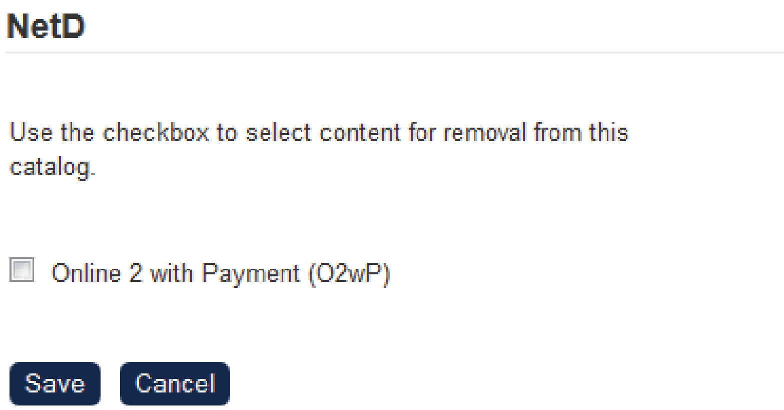
On a fresh install of the LMS, the option "Enable Catalog Assignment at the User Level" is disabled by default. When upgrading from an earlier version, if no existing catalog assignment data exists at the user level, then the configuration option will be automatically disabled, otherwise it will be enabled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

When enabled, the *Environment* tab in the User Editor will include a section that allows you to assign specific course catalogs to the user.

Updating Catalog Content

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

1. Go to **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.
2. Select the catalog you want to update.
3. Either click the **Action Menu** or the **Context Menu** then select **Edit Catalog Properties**.
4. Use the checkbox to select which content will be removed from the catalog

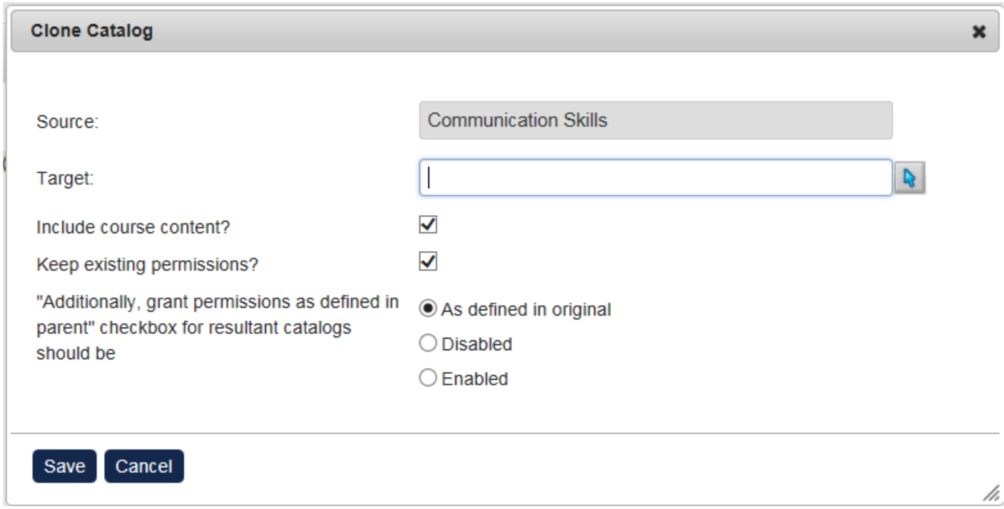


5. Click **Save** to Update.

Cloning Catalogs

To clone a catalog

1. Go to **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.
2. Select the catalog you want to clone.
3. Either click the **Action Menu** or the **Context Menu** then select **Clone**.
4. Click the Target link to select the catalog to which you want to move or clone the source catalog to. You can also specify course content and permissions handling.



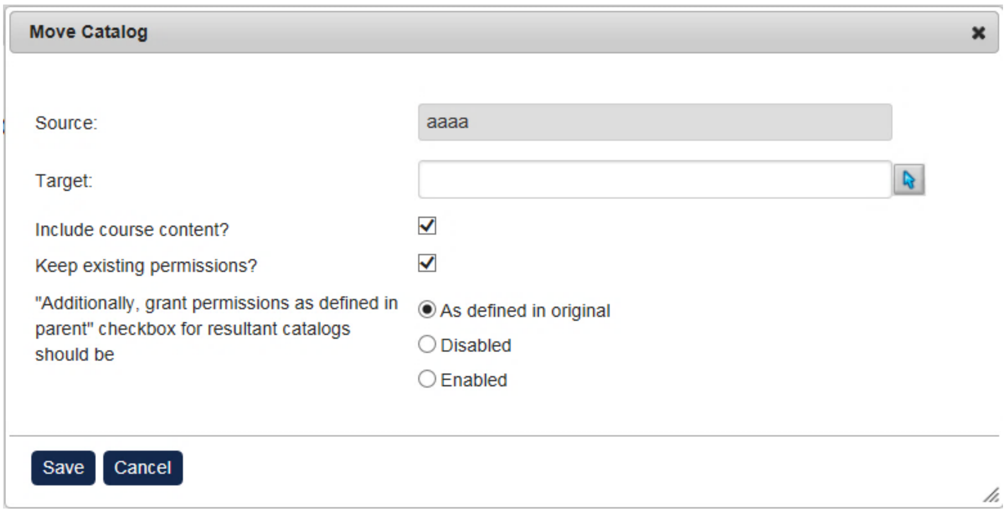
5. Click **Save** to Update.

Deleting Catalogs

1. Go to **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.
2. In the *Catalog List Maintenance* screen, select the catalog you want to remove.
3. You either click the **Action Menu** or the **Context Menu** then select **Delete**.
4. Confirm to delete

Moving Catalogs

1. Go to **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.
2. Select the catalog you want to move
3. Click the **Action Menu** or the **Context Menu** then select **Move** or simply drag the catalog and drop it to the desired location.
4. Click the **Target** link to select the catalog to which you want to move or clone the source catalog to. You can also specify course content and permissions handling.



5. Click **Save**.

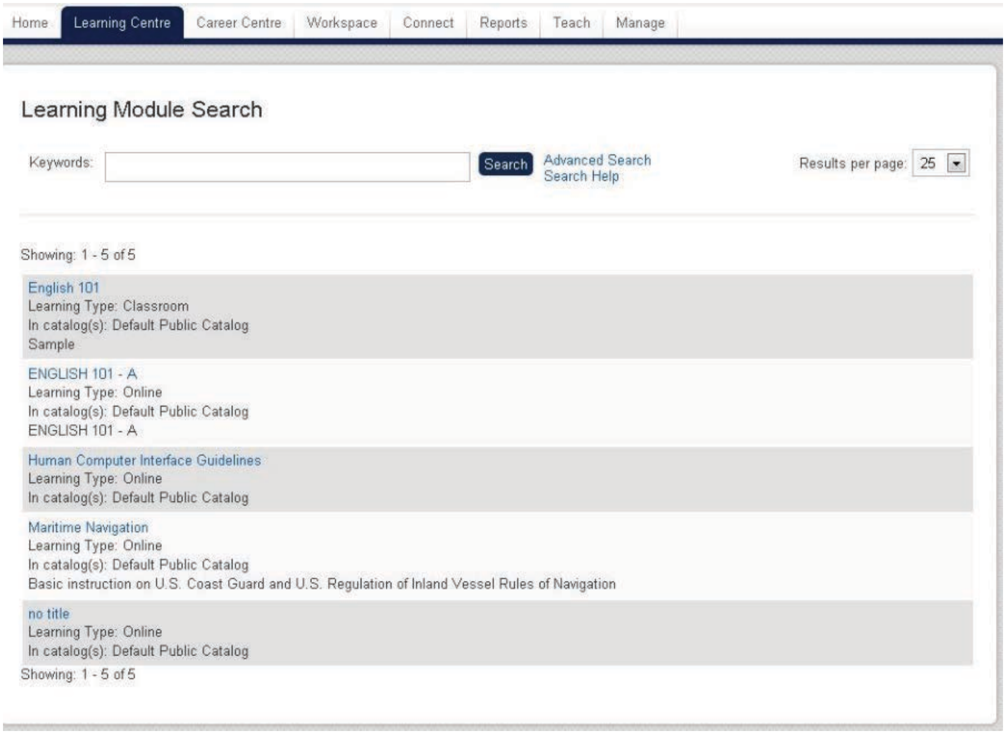
Catalog Search Configuration

You can configure catalog search results to display in a format that fits your organization's preference. For sites that primarily have a classroom based offering, you may want to enable the session level results display. For sites that primarily host online courses, you may want to allow users to directly enroll from the search results.

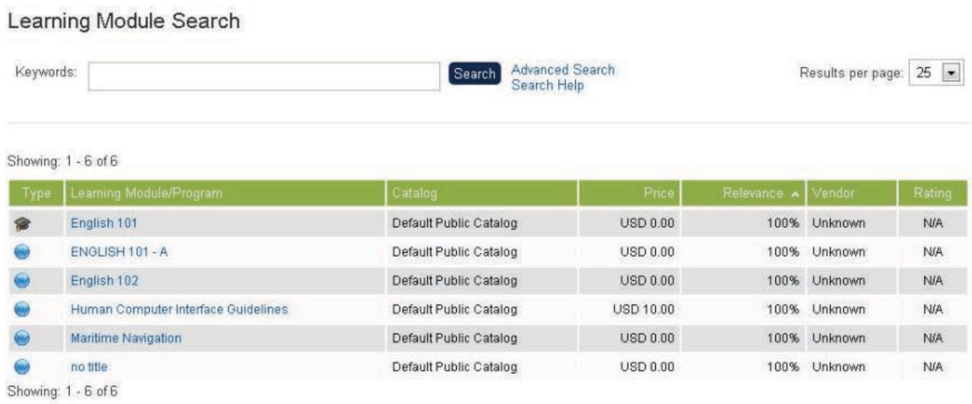
Catalog Search Result Formats

Configure catalog search results display using the "Search Result Format" System Configuration. You can choose from:

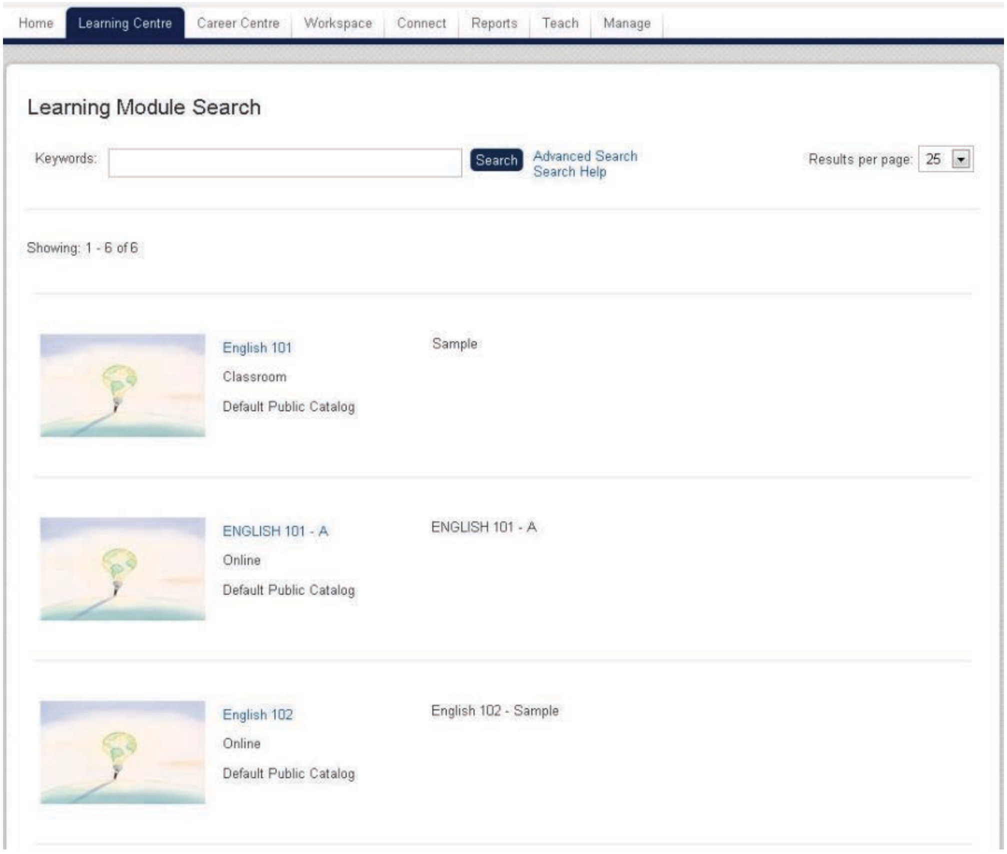
- Learning Module/Program Name, Learning Type, Catalog and Brief Description format



- Learning Type, Learning Module/Program Name, Catalog, Price, Relevance, Vendor and Rating format (with this search result format, you can sort the list according to column)



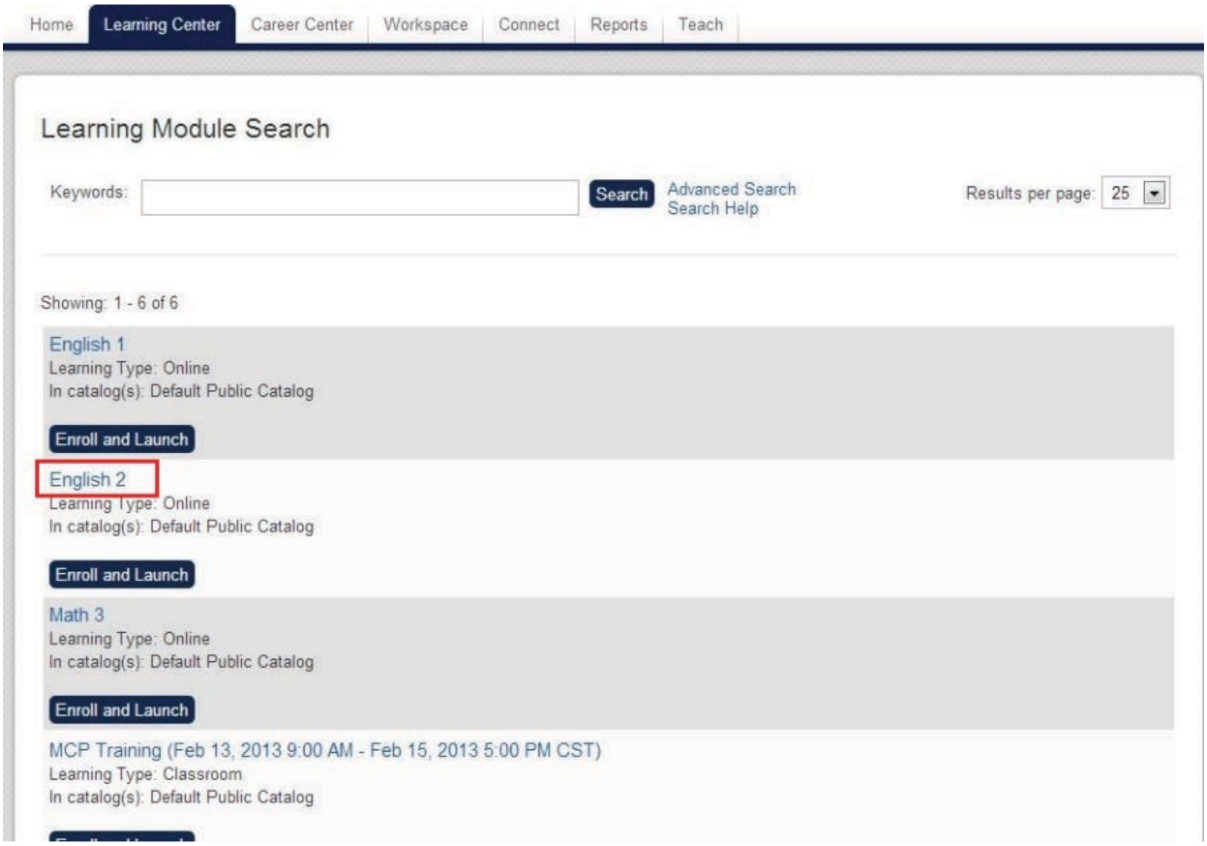
- Module Image, Learning Module/Program Name, Learning Type, Catalog, Duration and Brief Description format



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

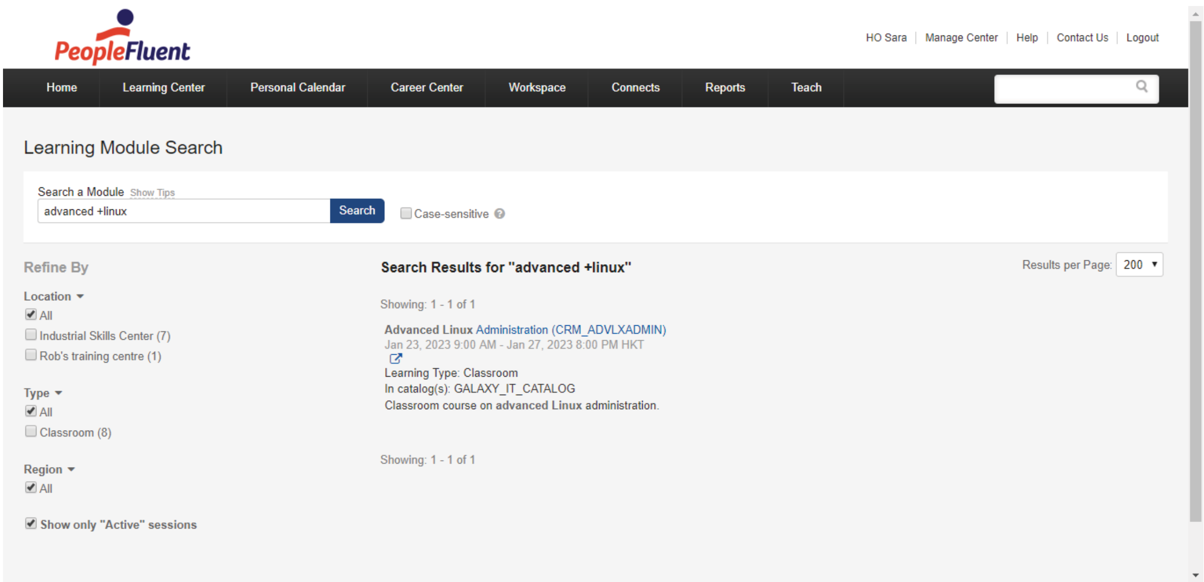
Directly Enroll from Search Result

To allow learners to directly enroll to a learning module from the catalog search result though an "Enroll and Launch" button, enable the "Directly enroll and launch modules from catalog search result" system configuration.



Session-level Catalog Search Results Display

By default, the catalog search produces a learning object oriented result list. For organizations that are heavily classroom-session oriented (such as training sales companies), an alternate search screen and result list is available.



This option is biased towards classrooms and allows search based on location and lists the individual sessions that meet the search criteria. The resulting course information page also only lists just the single session that the user may click on from the search result list. The keyword search is still learning-object oriented, hence the indexed portion of searching applies to module level properties only, with the drop-down filters then used to determine which sessions to show.

Enabled this view using the **Enable Session-level Catalog Search Results** system configuration.

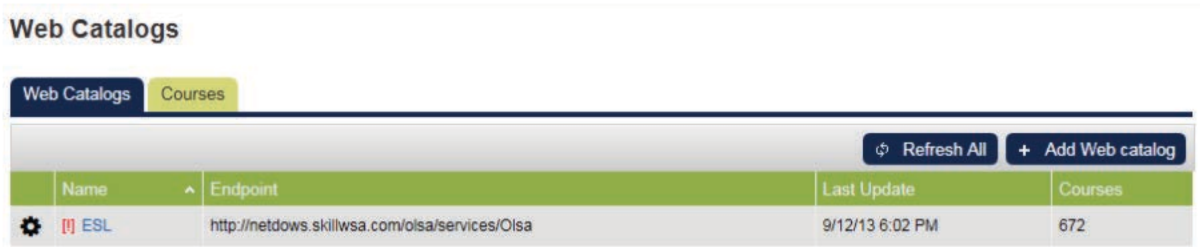
Web Catalogs

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

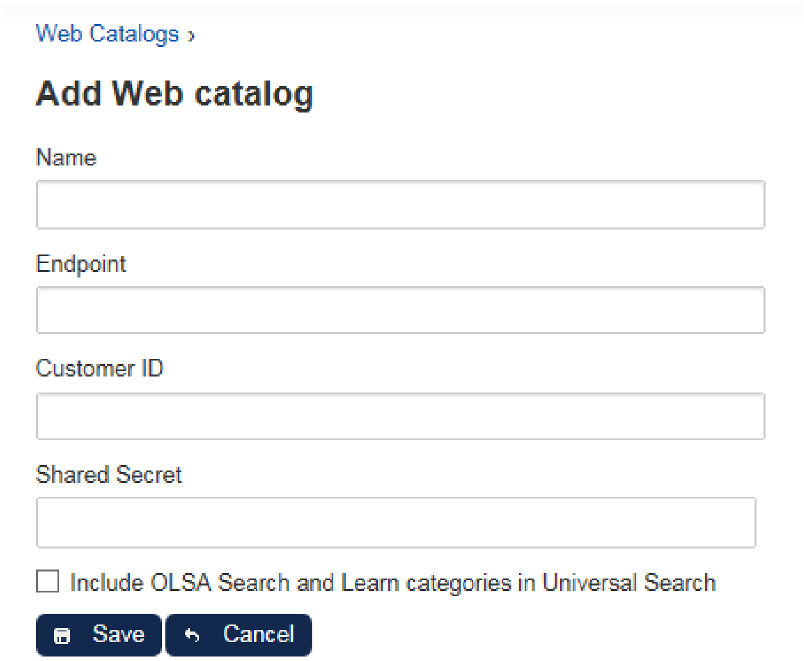
The Web Catalog feature is created for clients that uses SkillSoft's learning contents that are located directly on skillsoft servers. The course and catalog information on skill soft server must be imported into the LMS. Generally the number of courses the clients subscribe to are in the order of thousands and its not practical to import course data manually. SkillSoft uses a service framework called OLSA (open learning services architecture) to share the catalog/ course information present on their servers with the LMS. This integration of the LMS with SkillSoft based on OLSA is called Web Catalogs in the LMS.

Creating Web Catalog

- Proceed to **Manage Center** > **LEARNING** > **CATALOG GENERAL SETTINGS** > **Web Catalogs**
- This opens *Web Catalog* tab screen.



- Click the Add Web Catalog. The *Add Web Catalog* tab screen appears.

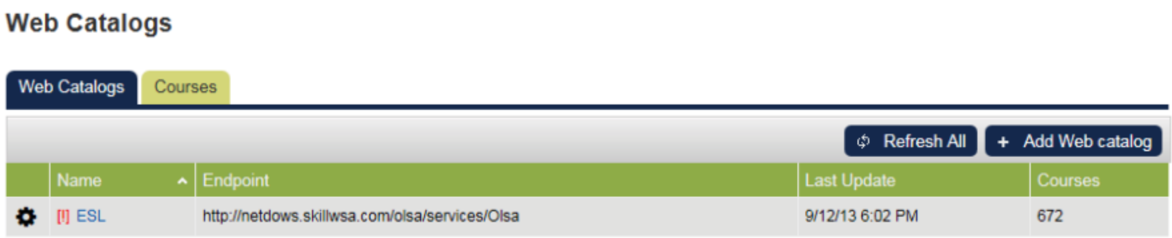


The following fields are required to create a web catalog configuration.

- name
- endpoint - url to the server from where the information is to be pulled
- customer id - sort of user name
- shared key - sort of password

- a checkbox option to include various kinds of course information in standard searches

Click **Save** to keep the record. The newly created web catalog will be display on the list.



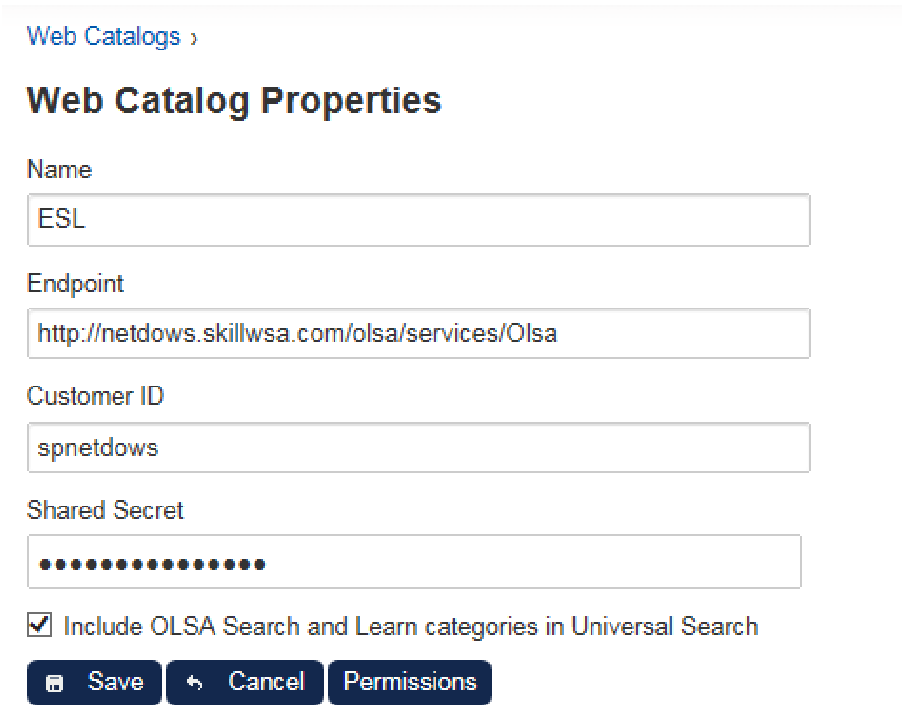
Note: Once all the correct settings are provided, Admin has to "Refresh All" so that the system gets the catalog info from the endpoint. Once the Refresh is done you can see the imported course/catalog details from the course tab.

Also once the import is over, you will notice that all the imported course and catalog information can also be accessed from catalog editor as if they were locally imported. And from there on, you can set other properties and manage them just like other LMS courses.

Editing Web Catalog

Click the configuration icon of the catalog you want to update.

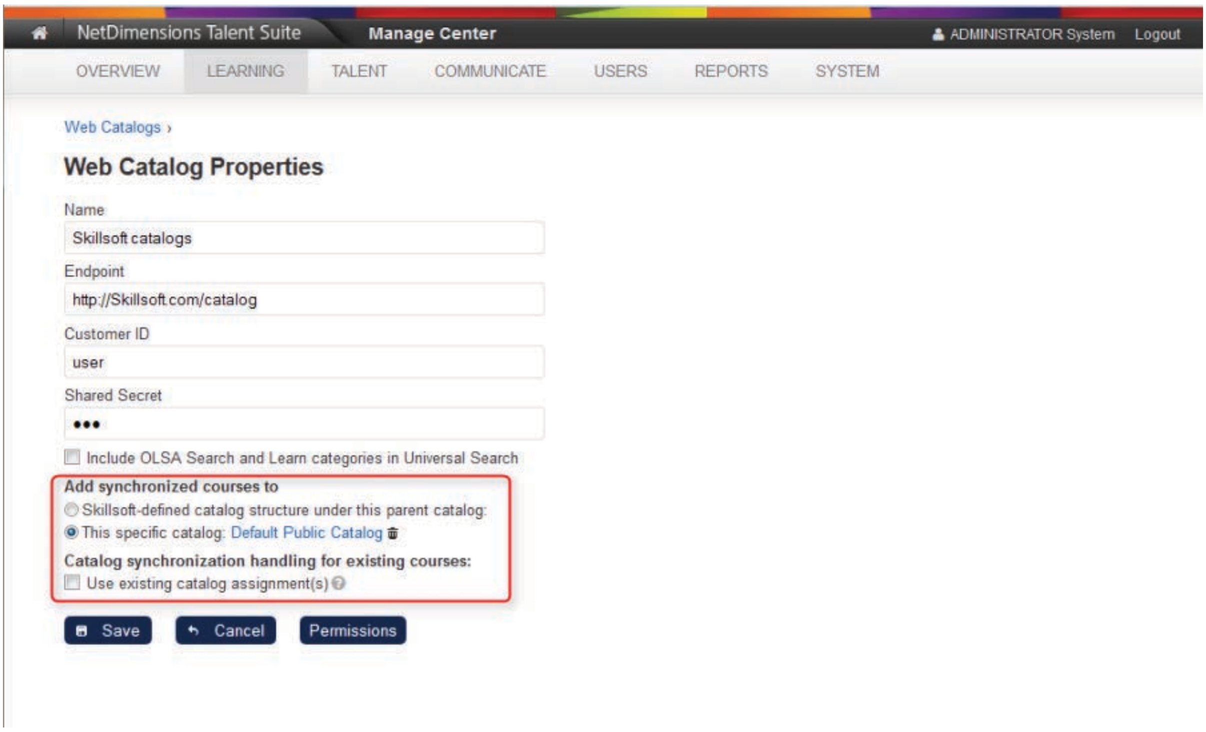
This opens *Web Catalog Editing* screen.



Modify the web catalog properties and then click **Save** to keep the updates.

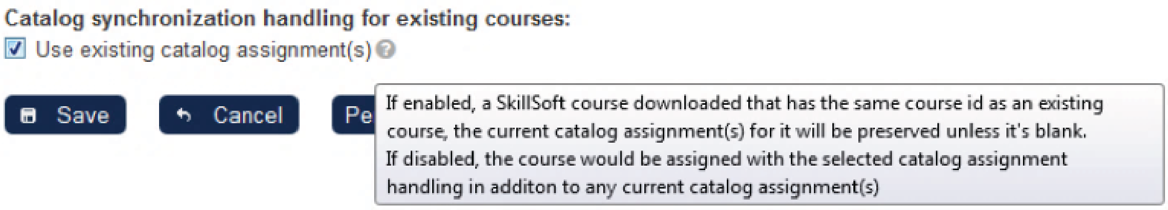
OLSA - Catalog Synchronization Integration

The synchronization of the SkillSoft library catalog structure via OLSA allows for setting up the catalog synchronization handling properties on the Web Catalog Properties edit page. The setting "Add synchronized courses to" controls how catalog assignments should be handled for newly downloaded courses from Skillsoft. If the first option has been selected, the downloaded courses will be put in the Skillsoft defined catalog hierarchy, and this structure will be created under a selected catalog acting as the parent. If second option has been selected, the downloaded courses will be put directly under the selected catalog which is how it was like before this feature was introduced.



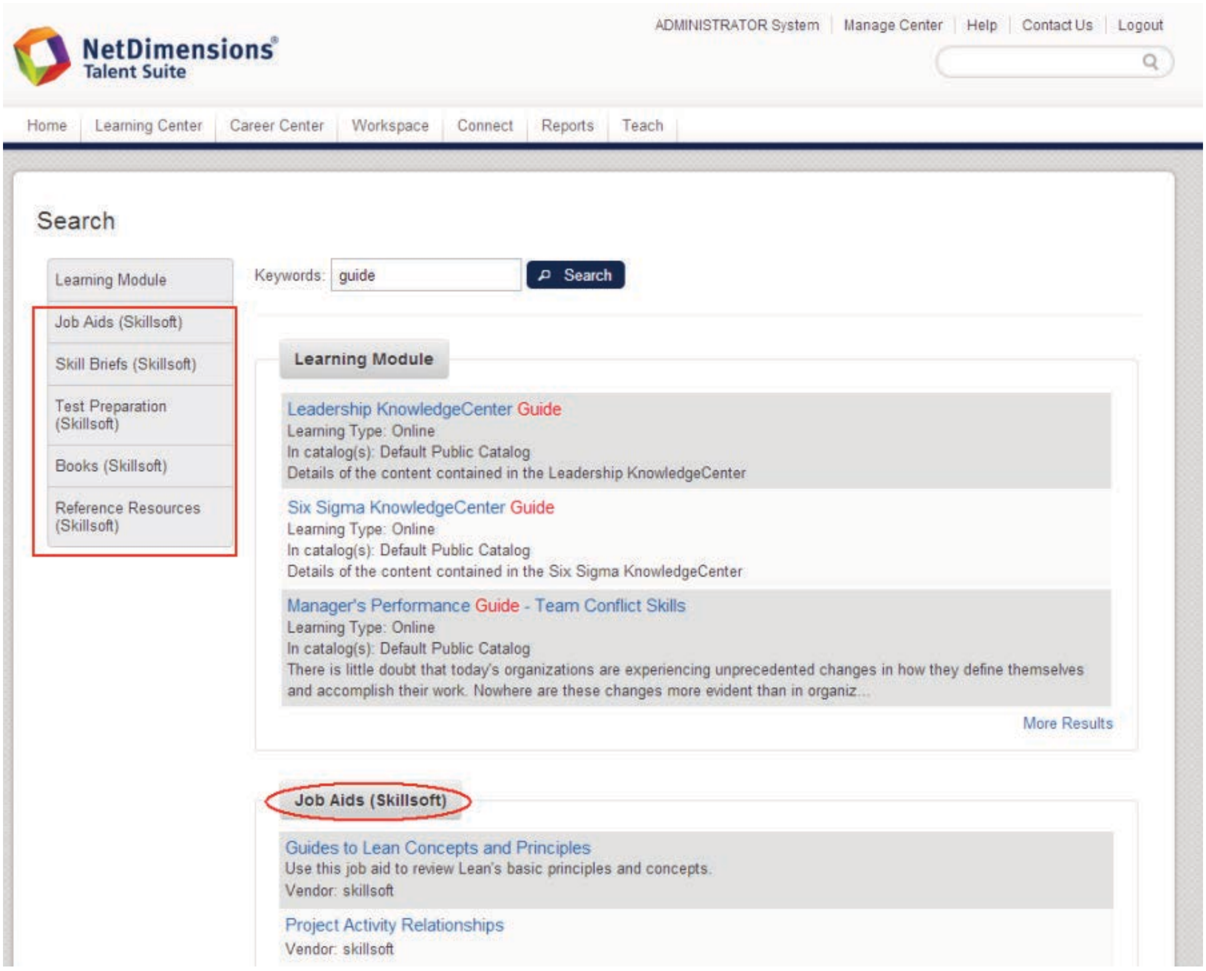
The setting "Catalog synchronization handling for existing courses:" controls how catalog assignments should be handled for SkillSoft courses downloaded that already exist on the LMS, for example, a course update being rolled out.

- If this option is enabled, a Skillsoft course downloaded that has the same course id as an existing course, the current catalog assignment(s) for it will be preserved unless it's blank.
- If this option is disabled, the courses would be assigned with the selected catalog assignment handling (configured above) in addition to any current catalog assignment(s).



Skillsoft Resources in Search Results

The LMS Search can integrate with OLSA's 'Assets Integration Service' to return Skillsoft resources categorized into Job Aids, Skill Briefs, Mentoring, Test Preparation, Books and Reference Resources.

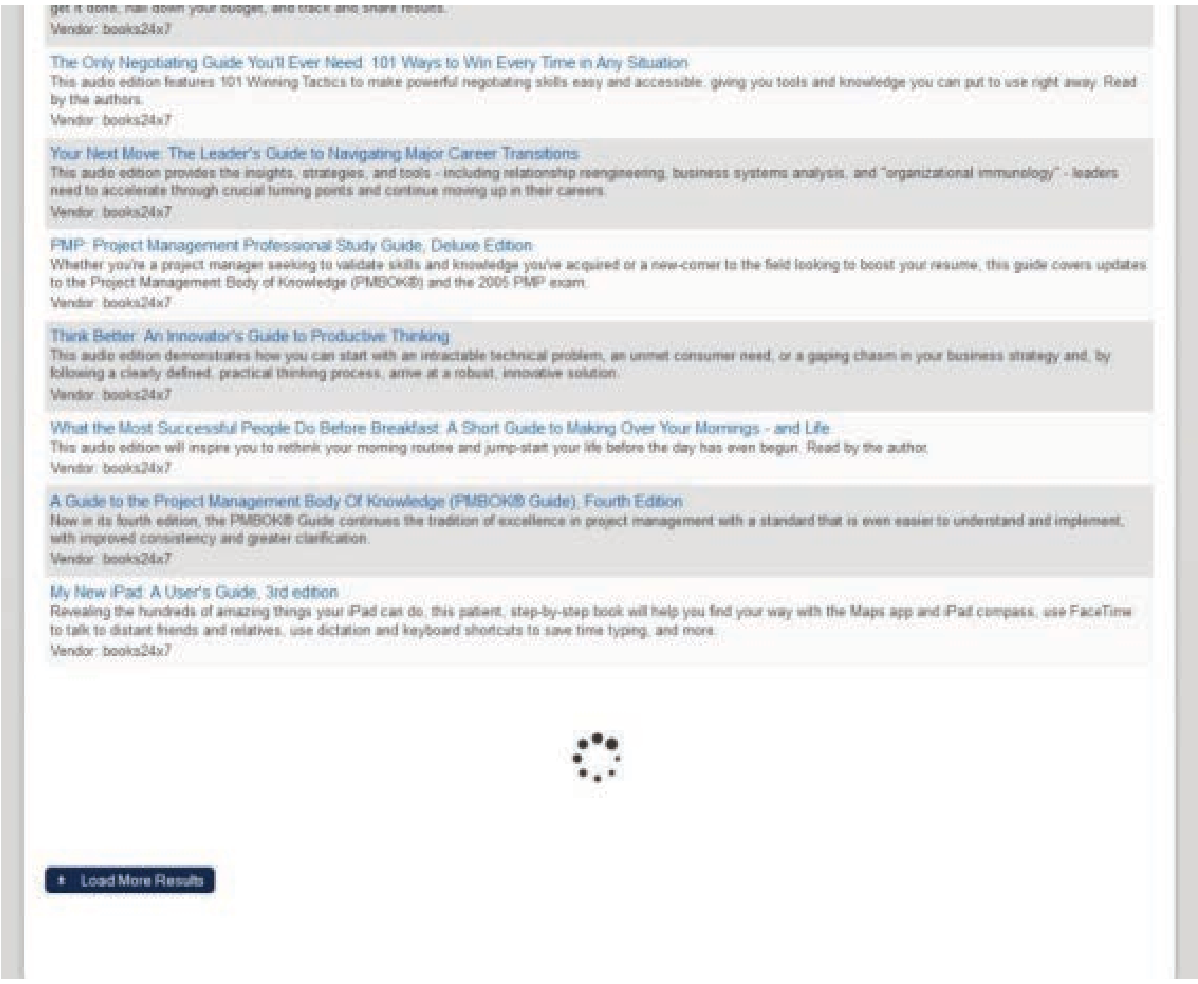


To enable, setup a web catalog account in **Manage Center > Learning > Web Catalogs** and enable **"Include OLSA Search and Learn categories in Universal Search"**:

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

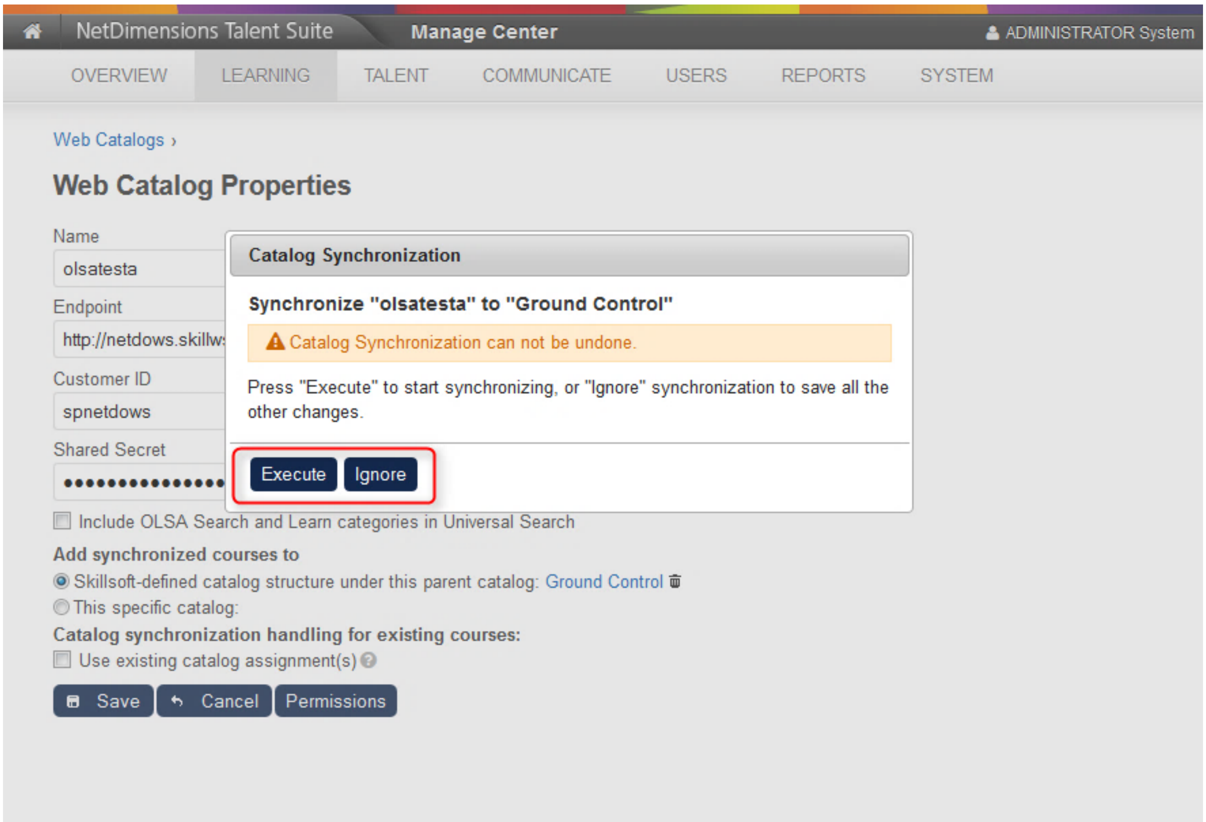
In addition to the learning types in the LMS, search will also return external types from Skillsoft if so configured. If there are more results than what is configured for the integrated search results page, a "more results" link will be displayed below the initially listed results for a particular item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

Clicking on the "More Results" link will bring the user to the search result page for the selected category with the first 10 results displayed. If there are more than 10 results, a "Load More Results" link will be displayed. Clicking the button will search for the next 10 results from Skillsoft. If there are less than 10 results from a search request, the "Load More Results" button will not be displayed.



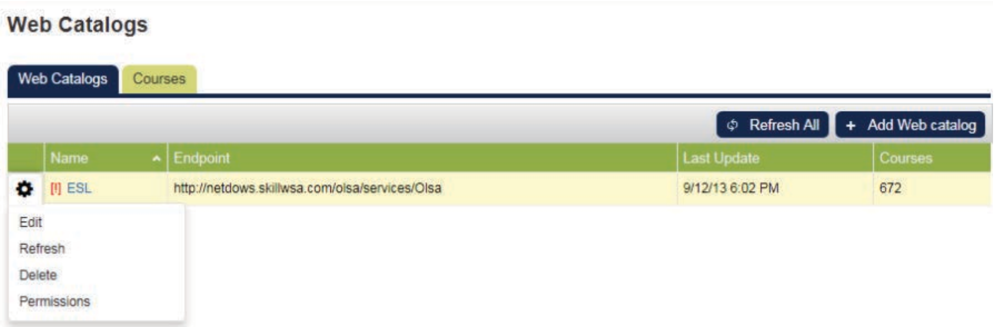
OLSA - Full Catalog Update

Upon upgrade, the second synchronization option will be selected as the default. In order to mirror the catalog assignments of imported courses to the SkillSoft hierarchy, the administrator may toggle to use the first synchronization option and then save. Upon saving, a dialog will be shown that asks if the administrator wants to execute a full catalog update since existing SkillSoft courses wouldn't carry the SkillSoft catalog assignments. The administrator can click Execute to kick off the full catalog update or elect to click Ignore and the catalog update will not happen because a full update could potentially take quite long to complete. A full catalog update will add the Skillsoft-defined catalog structure under a selected parent catalog, if it does not exist, then assign the imported courses to the relevant catalogs.

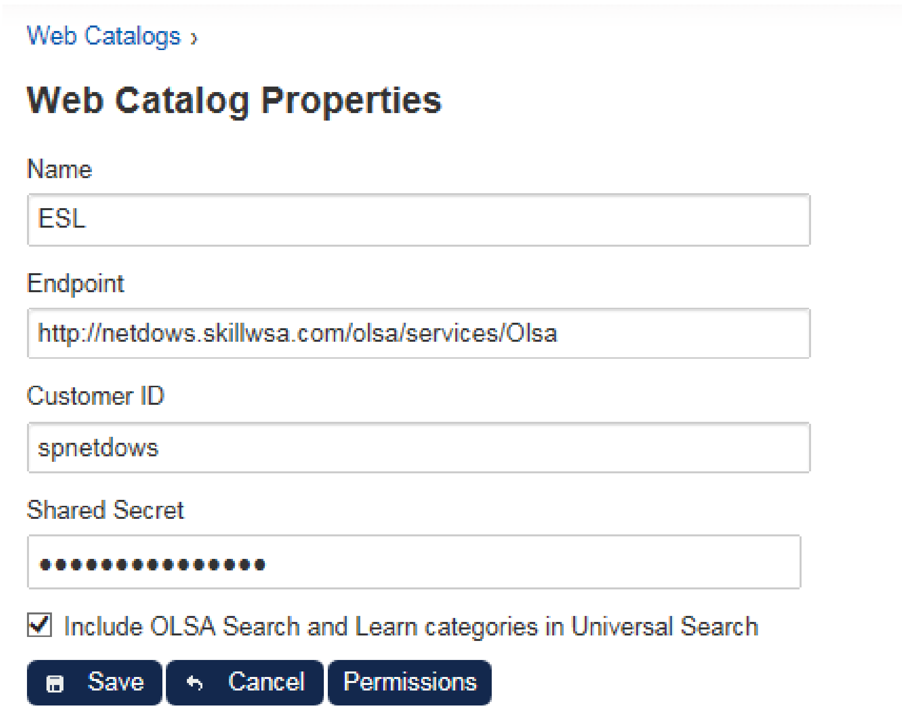


Setting the Permission of the Web Catalog

To set permission you can either click the Permission button in the **Gear** icon:



Or insider the Web Catalog Properties.



Set the permission properties:

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

- Read Only Access.
- Unrestricted Write Access
- A user with no permission to a Web Catalog will not be able to see a specific web catalog in the Web Catalog tab or its related courses in the Courses tab.
- A user with read permission will be able to see a specific web catalog in the Web Catalog tab and its related courses in the Courses tab, but not be able to edit the catalog and its courses.
- A user with write permission will be able to refresh a specific web catalog, edit and delete it.

Standard Course Attribute Configuration

When setting up courses in the LMS, you will want to assign properties for identification and classification. The LMS provides some drop down attributes as standard:

- Category
- Subject
- Language
- Geographic Region
- Vendor

You can configure each attribute to specify what drop down values can be offered.

Categories

Categories are managed at Learning > Catalog Configuration > Categories.

To add a category:

1. Click Create Category
2. Enter the new name of the category and Save

To edit a category:

1. Select Edit Category under the context menu for the category you want to edit
2. Modify the name and save

To set category permissions

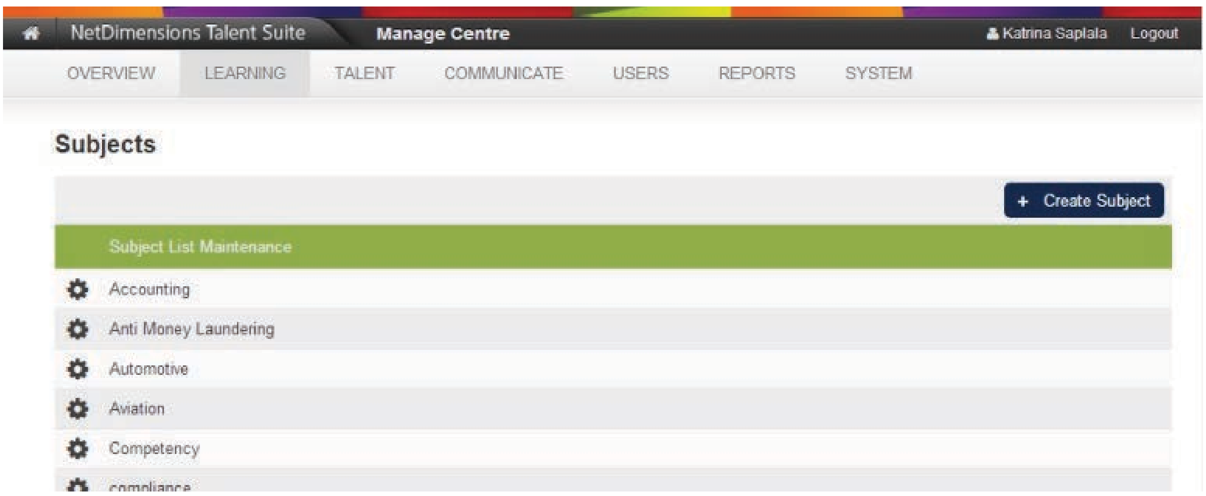
1. Select Permissions under the context menu for the category in question
2. Set permissions criteria and save

There two types of access you can give to users, namely;

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

Subjects

To maintain subjects, go to **Manage Center > Learning > Catalog Configuration > Subject.**



To add a new subject:

1. Click the Create Subject button
2. Enter the subject name and Save

To update a subject:

1. Click Edit Subject in the context menu of the subject to update
2. Update the subject name and save

To delete a subject:

1. Click Delete Subject in the context menu of the subject to delete
2. Confirm to delete

To set subject permissions:

1. Click Permissions in the context menu of the subject in question
2. Set permissions criteria and save

There two types of access you can give to users, namely:

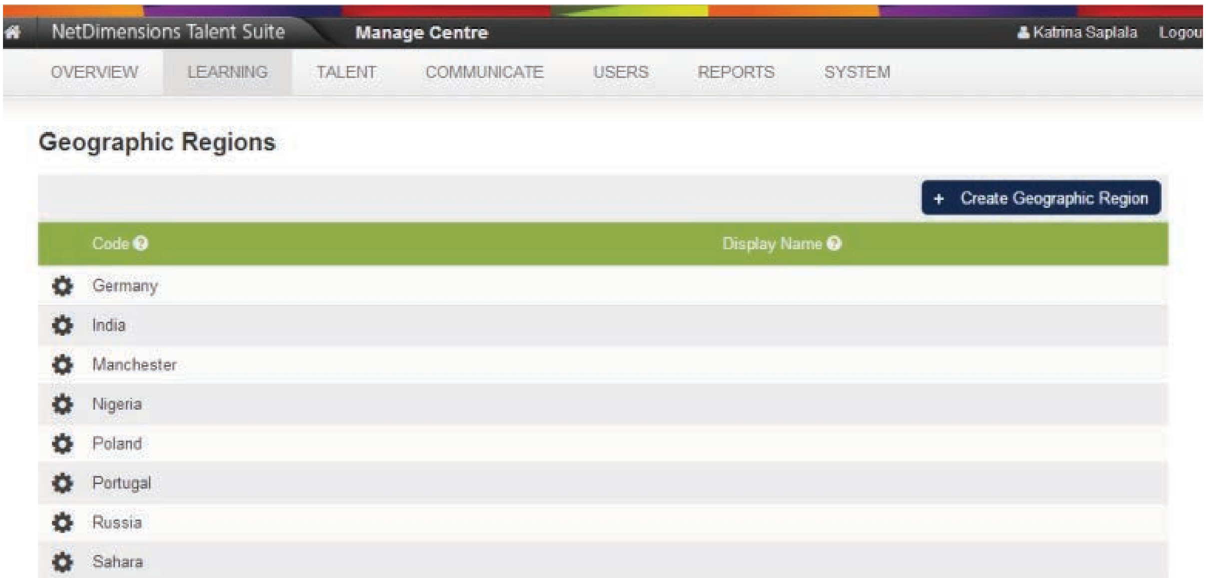
- ***Read Only Access.*** - Having READ permission means a user can:
    - see a Subject but not perform any action
    - use a Subject as search criteria in Learning Module Management
    - assign a Subject to a Learning Module in Catalog Editor and Course CSV Loader.
- ***Unrestricted Write Access.-***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

Languages

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

Geographic Regions

Geographic Regions are used to categorize class locations and thereby provide learners with the ability to scan course schedules in region-specific calendars. Geographic Regions are maintained at **Manage Center > Learning > Catalog Configuration > Geographic Regions**.



To add a new Geographic Region:

1. Click the Create Geographic Region button
2. Enter Geographic Region Code and the Display Name

3. Save

To edit a Geographic Region:

1. Click Edit Geographic Region in the context menu of the region you wish to edit
2. Make changes and save

To remove a Geographic Region:

1. Click Delete Geographic Region in the context menu of the region you wish to delete
2. Confirm to delete

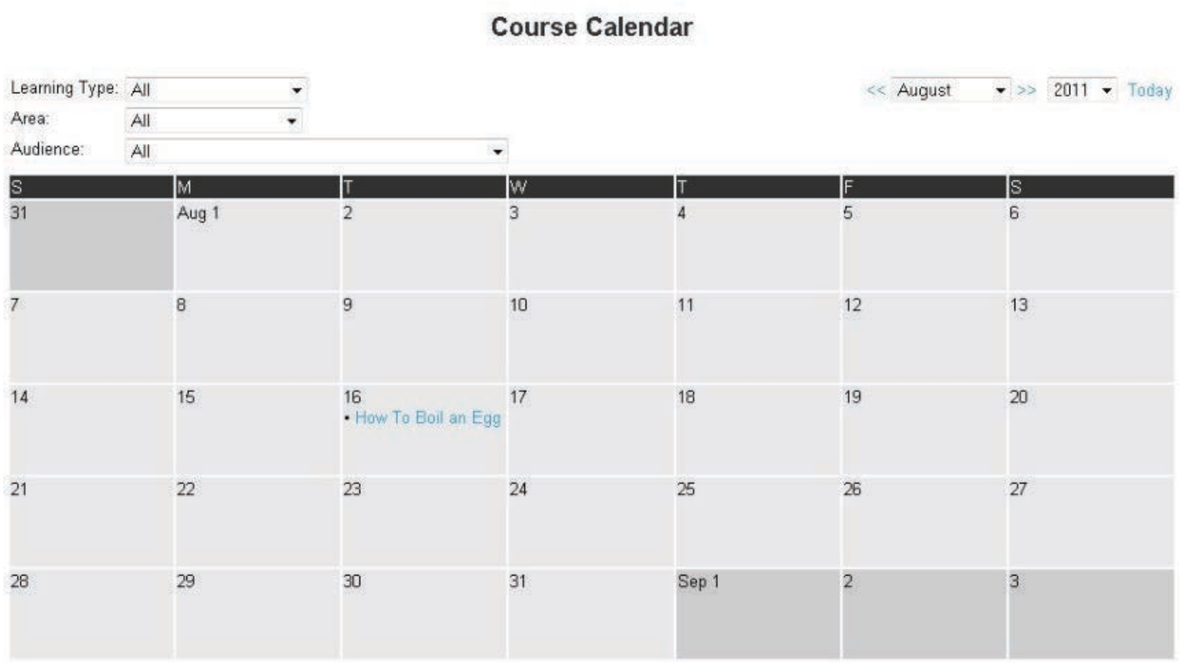
To set permissions on a Geographic Region:

1. Click Permissions in the context menu of the region in question
2. Set permissions criteria and save

User actions will be restricted by privileges granted on Geographic Region

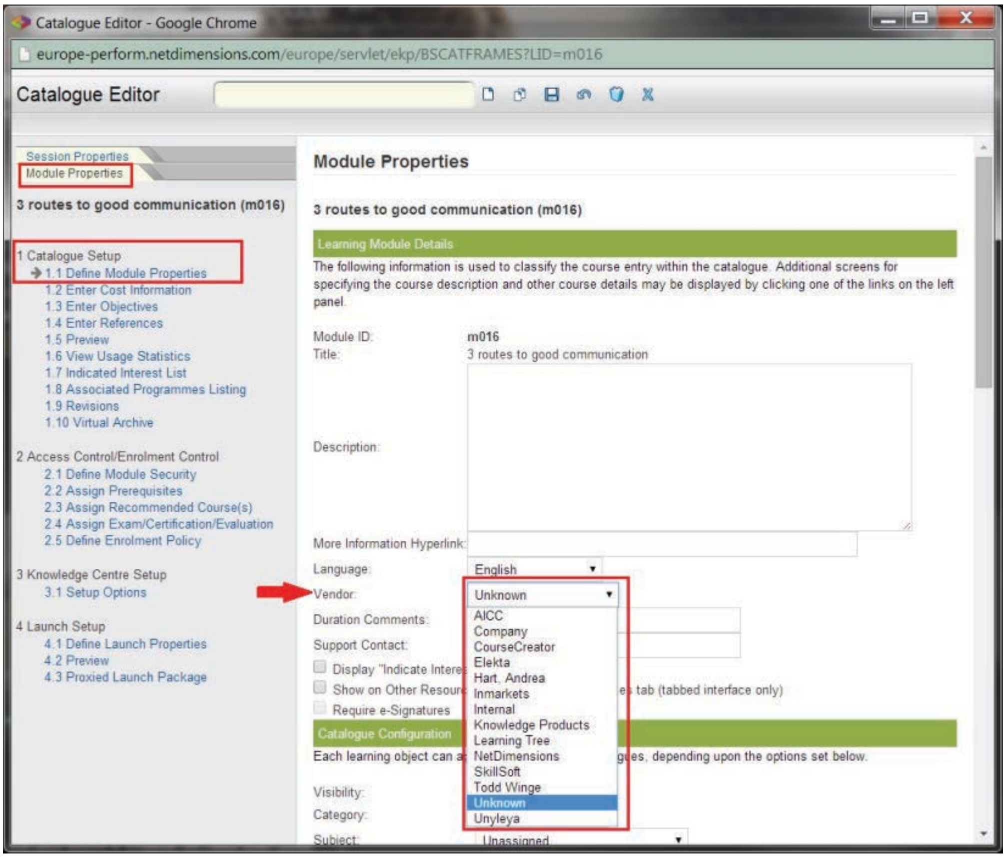
- ***Read Permission***
  - View the Geographic Region in Catalog Configuration > Geographic Regions
  - Use the Region in the following area:
    - Teach > Administrative Access
    - Catalog Editor
    - Course CSV Loader
    - Course Calendar
- ***Unrestricted Permission***
  - Edit or delete the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

Geographic regions may be used by learners to filter courses:

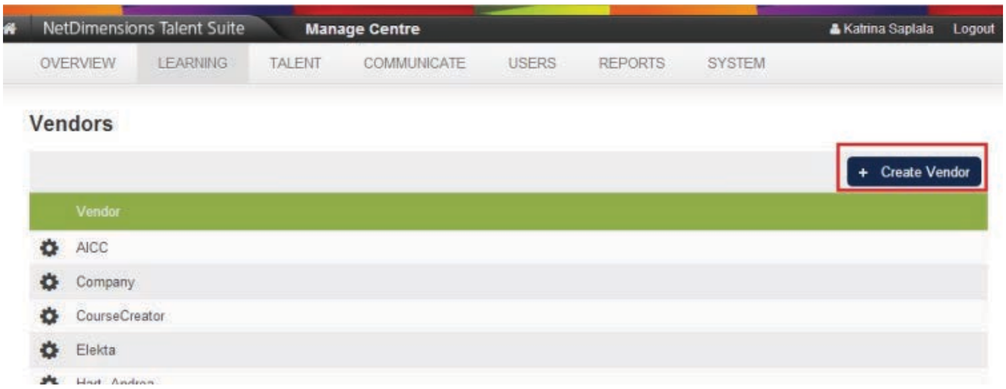


Vendors

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



To maintain a vendor list click Manage Center > Learning > Catalog Configuration > Vendors



To add a new vendor entry:

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

To edit a vendor entry:

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

To remove a vendor entry:

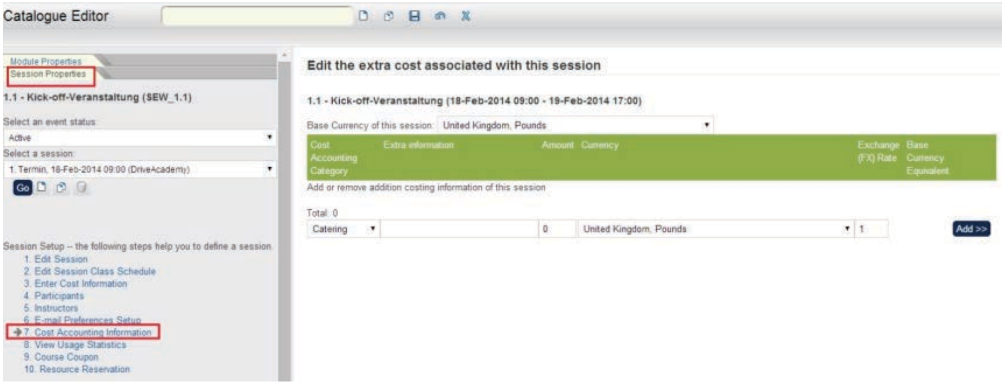
1. Select the desired Vendor from the drop down list by the Vendor field.
2. Click Delete Selection. A confirmation dialog box appears.
3. Click OK. The application returns an acknowledgement.

4. Click Back to Maintenance Form.

Cost Accounting Categories

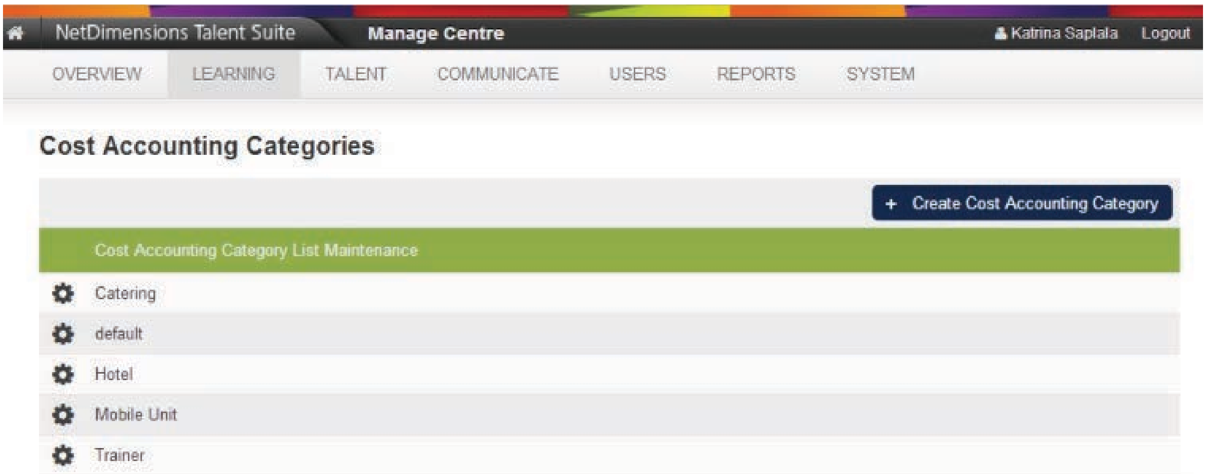
(available for Performance, Learning and e-Learning only)

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



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

To maintain cost accounting categories, go to **Manage Center > Learning > Payment Manager > Cost Accounting Categories**.



To add new Cost Accounting categories:

1. Click the **Create Cost Accounting Category** button
2. Enter the category name and save

To edit a Cost Accounting Category:

1. Click Edit Cost Accounting Category in the context menu of the category you wish to edit
2. Make your changes accordingly and save

To remove a Cost Accounting Category:

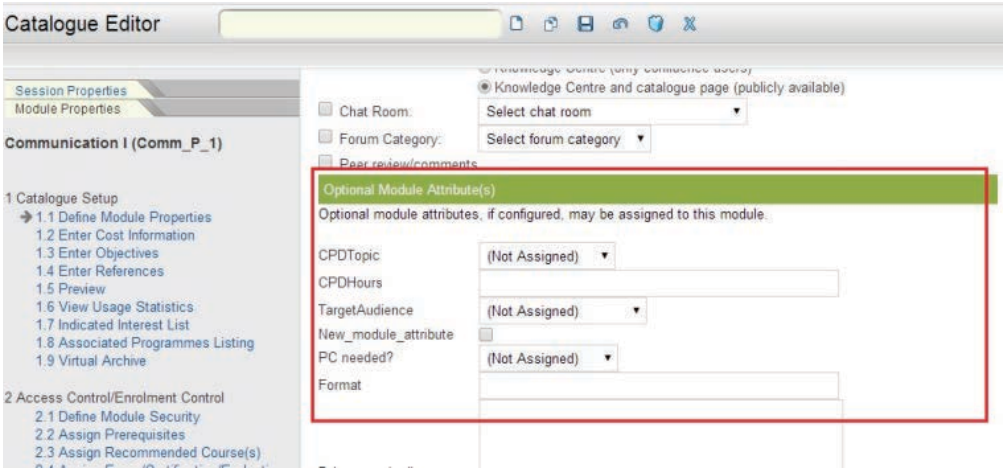
1. Click Delete Cost Accounting Category in the context menu of the category you wish to delete
2. Confirm to delete

Custom Attribute Configuration

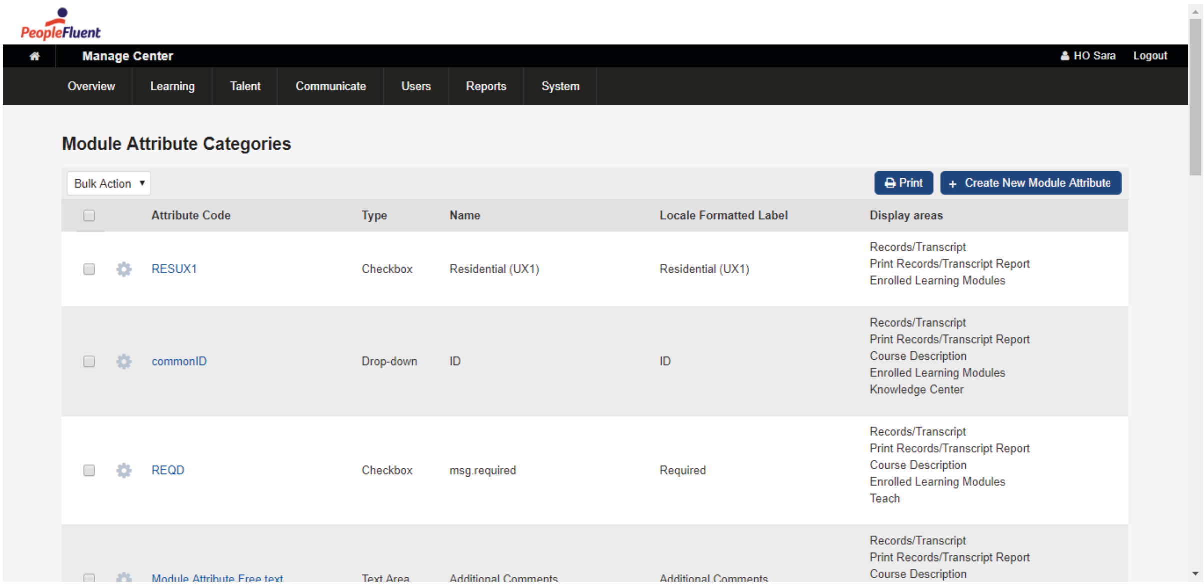
In addition to the standard attributes, you can configure any number of custom attributes to further classify your courses and records.

Module Attributes

You configure custom attributes and assign values in the Optional Module Attribute(s) section of the Catalog Editor:



To maintain a list of Custom Module Attributes, go to **Manage Center > Learning > Catalog Configuration > Module Attribute Categories**:

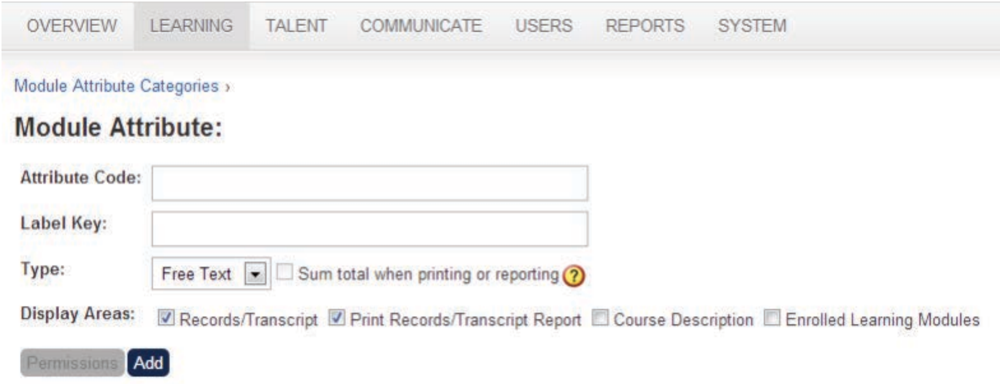


A module attribute can be one of four particular data types:

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

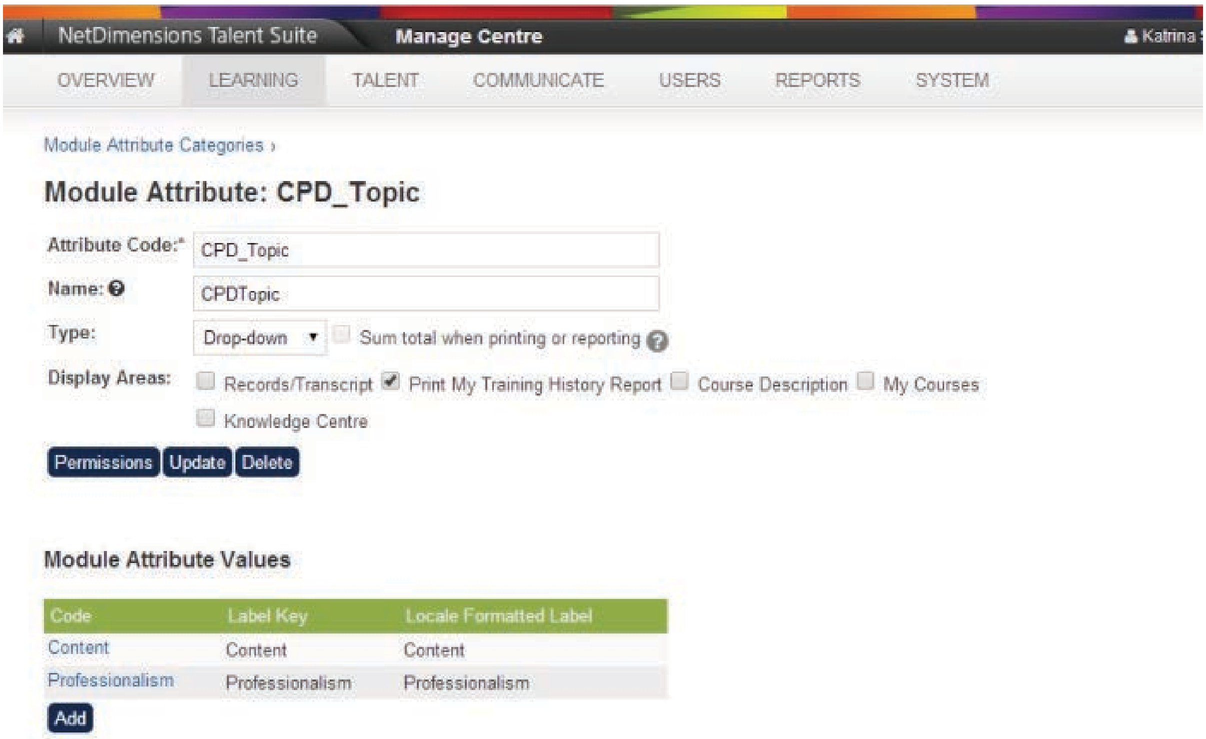
Adding Module Attributes

To add a New Module Attribute, click Create a New Module Attribute then fill in the attribute details:



Updating Extra Module Attributes

To edit an Extra Attribute entry, click on the gear icon of the attribute you wish to modify, then click Edit. Make the necessary modifications on the Module Attributes screen:



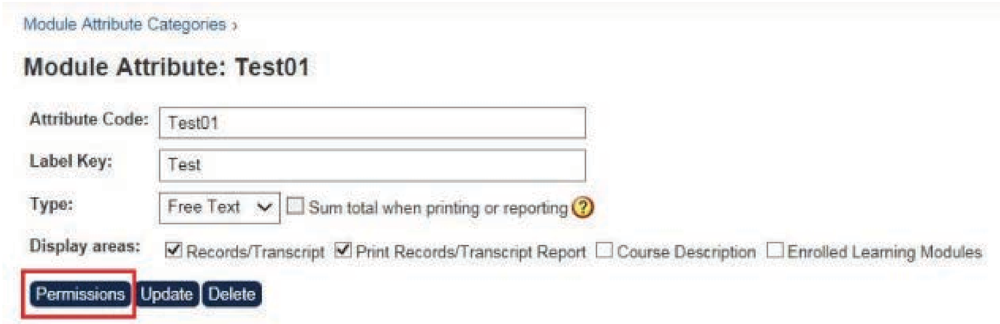
Deleting Extra Module Attributes

To remove extra modules attribute:

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

Setting Module Attributes Permissions

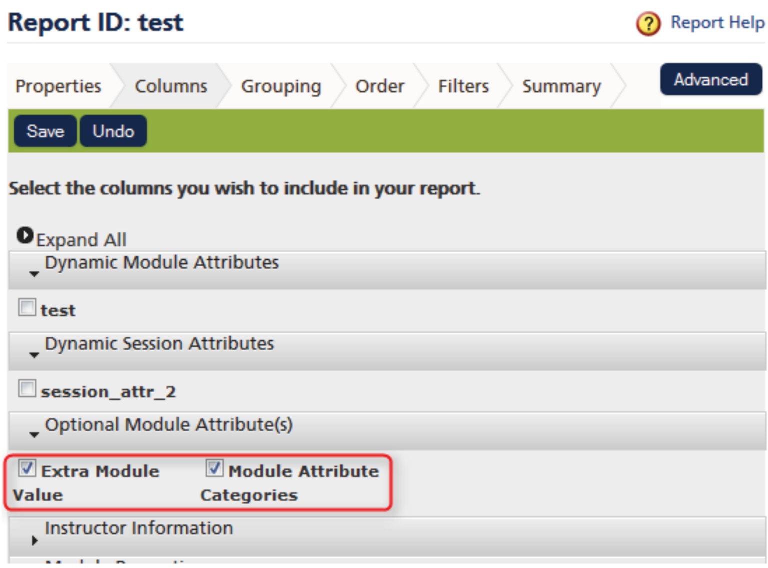
1. From the list, select the attribute you where you want to set the permission. It is also accessible from the edit screen:



2. Configure Permissions using the permissions selector
3. Permissions on module attributes are extended to report wizard. Users have to have read or write permission to the module attributes in order to view them in report wizard.

Report Wizard Support

Permissions on module attributes are extended to report wizard. Users have to have read or write permission to the module attributes in order to view them in report wizard. Module Value and Module Attribute Categories also reference module permissions. When these two options are checked, the report will include the module attributes that the user has access to in these two columns.

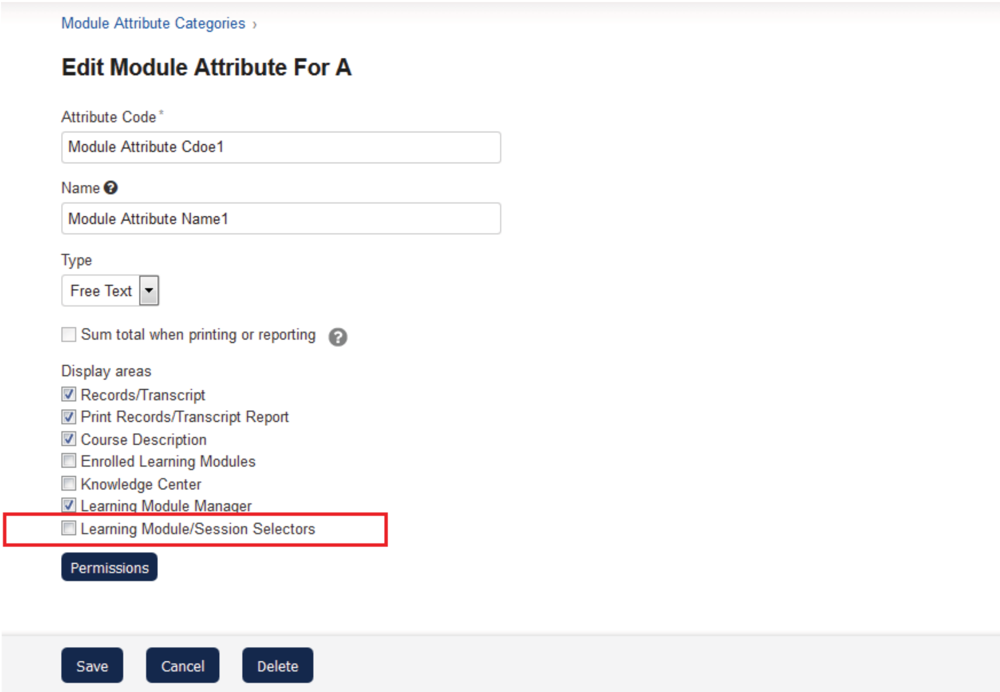


Searching by Module Attributes

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

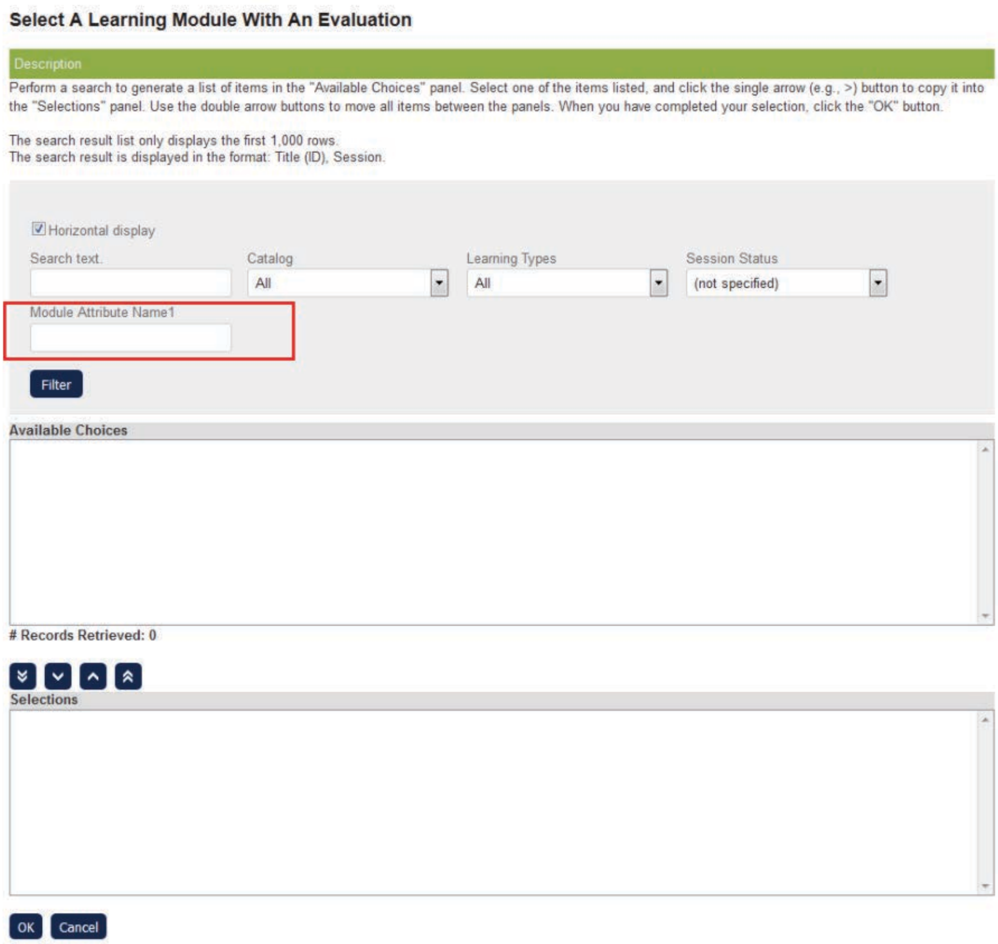
1.Module Attributes as Module / Session Selector Parameters

On each attribute configuration, it's optional to enable the attribute as a search filter on any available search screen. The "Learning Module Selector" and "Learning Module/Session Selectors" search areas have been added as display area options. By checking the "Learning Module/Session Selectors" Display areas option, this module attribute will appear on the Module, Module Session and Program Session selectors which allow searching with this filter:



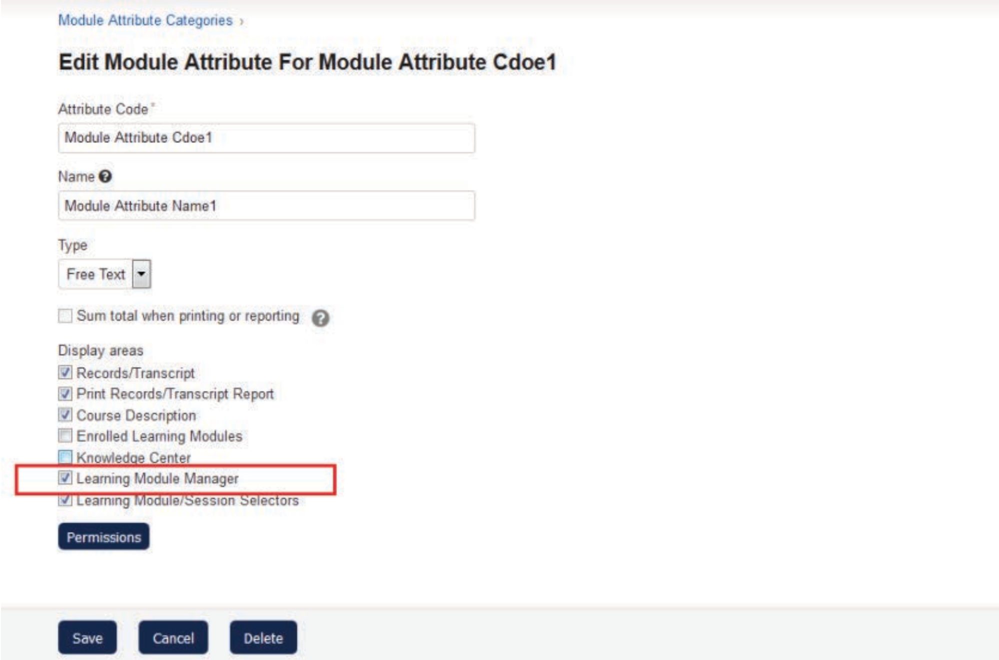
2.Module Attributes as Selector Filters

If configured, the module attribute will be available as a filter in module and session selectors:

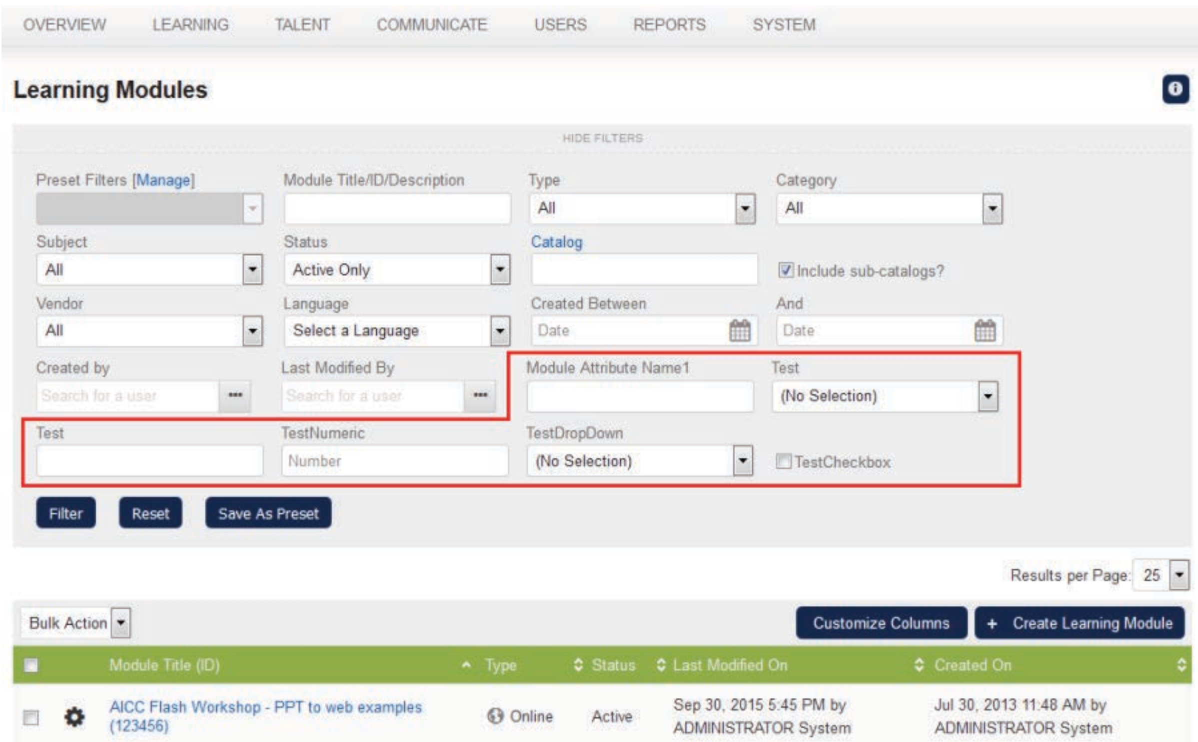


3.Module Attributes as Manage > Learning Modules Filters

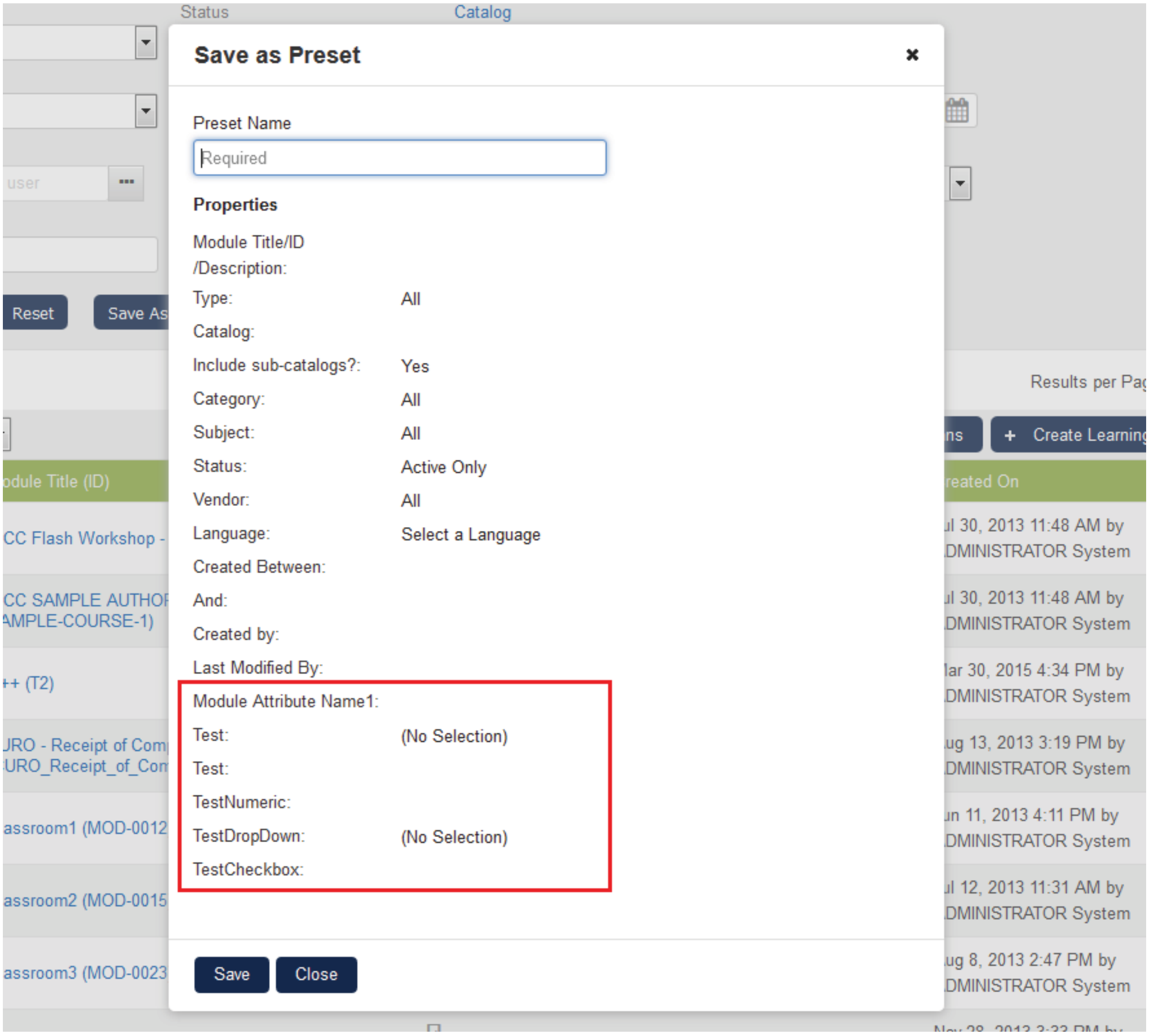
At the attribute level, you can enable "Learning Modules Manager" display area:



Once enabled, module attribute filters will appear on the Manage Learning Modules search:

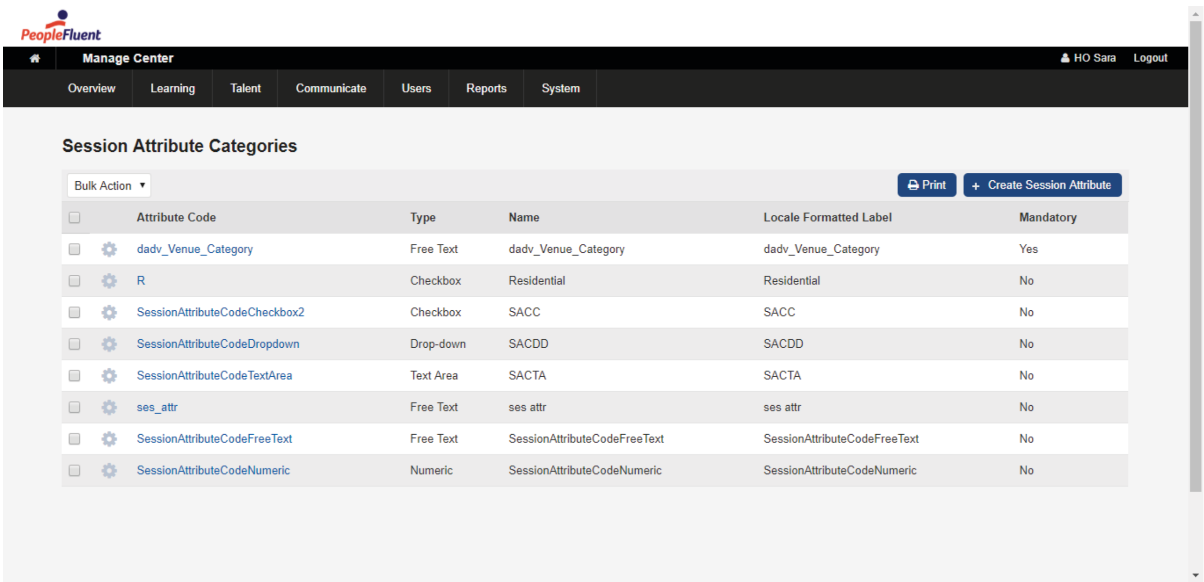


Selected module attribute filter values can also be saved as part of a preset filter for reuse.



Session Attributes

To maintain Session Attributes, go to **Manage Center > Learning > Catalog Configuration > Session Attribute Categories**

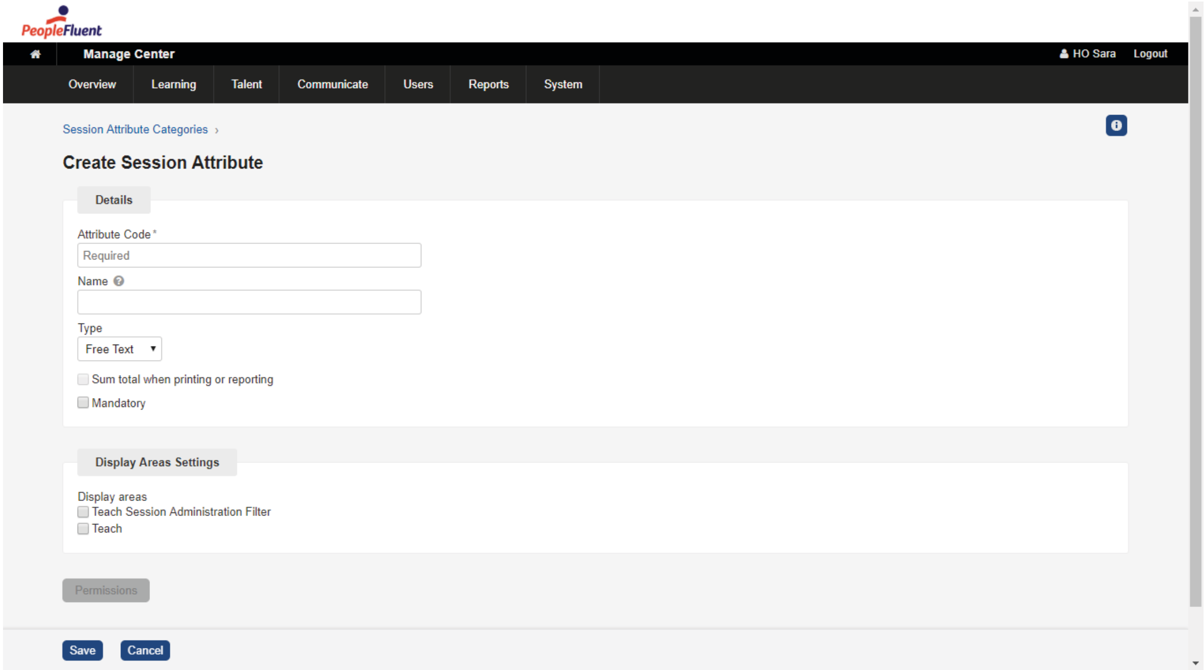


A session attribute can be one of the following types:

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

Adding Session Attributes

To add a new Session Attribute click **Create Session Attribute** and provide the attribute properties:



Updating Session Attributes

To edit a session attribute, click on the desired attribute in the *Session Attribute Category* screen and update the attribute properties.

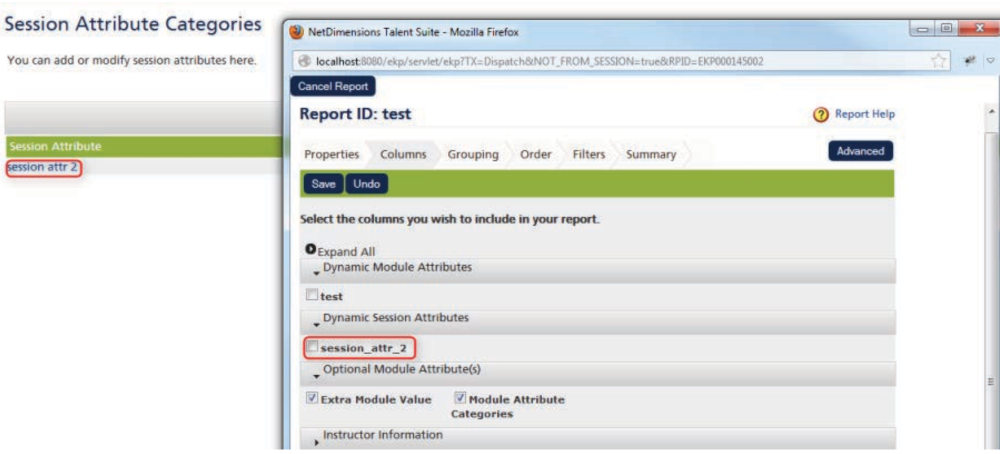
Deleting Session Attributes

To remove a session attribute:

1. Click on the desired attribute in the *Session Attribute Category* screen.
2. Click **Delete**.

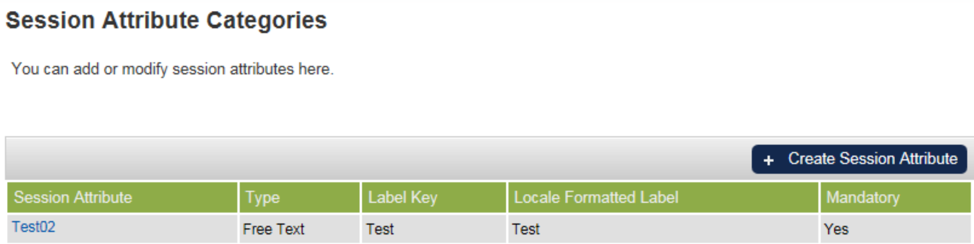
Setting Session Attributes Permissions

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

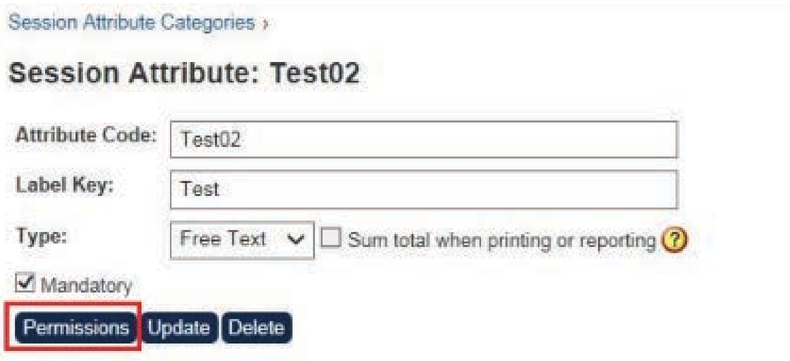


A user must have read/write permission to a Session attribute in order to select it in report wizard

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



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

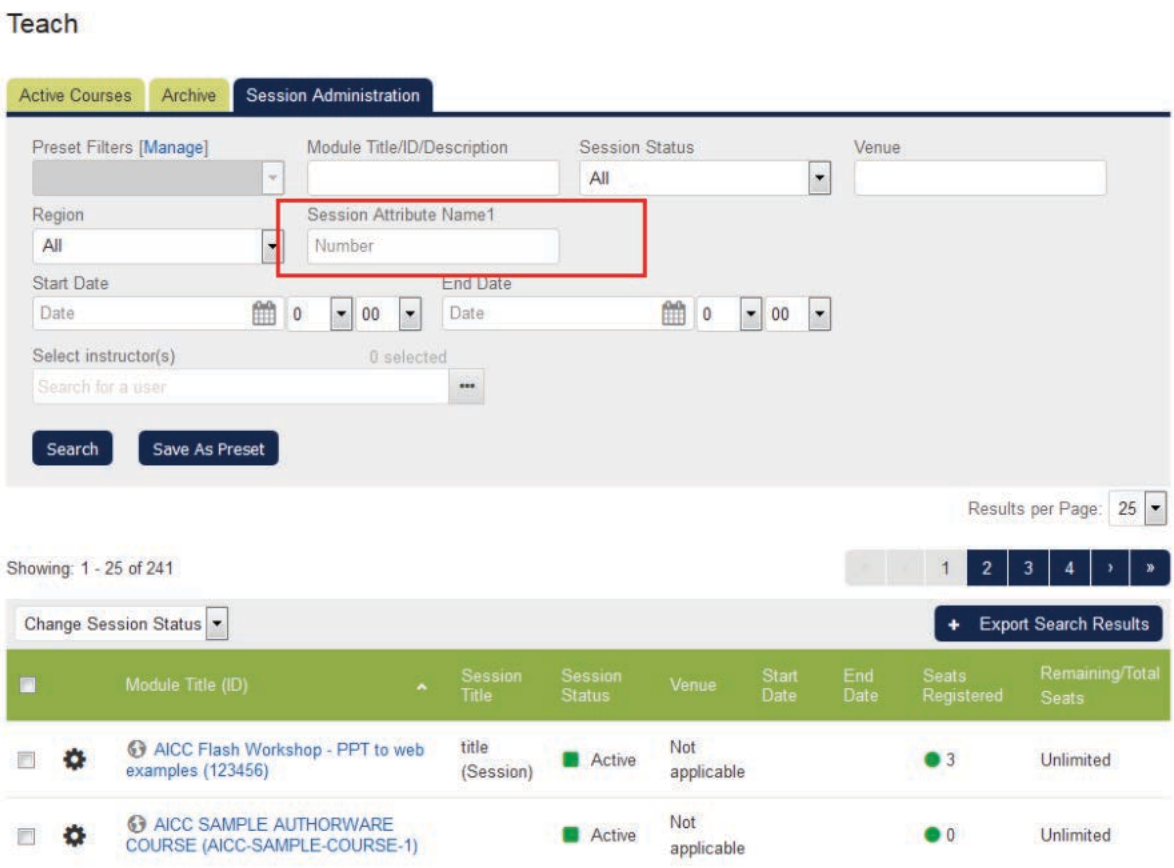


3.Apply Permissions using *Permission Selector*

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

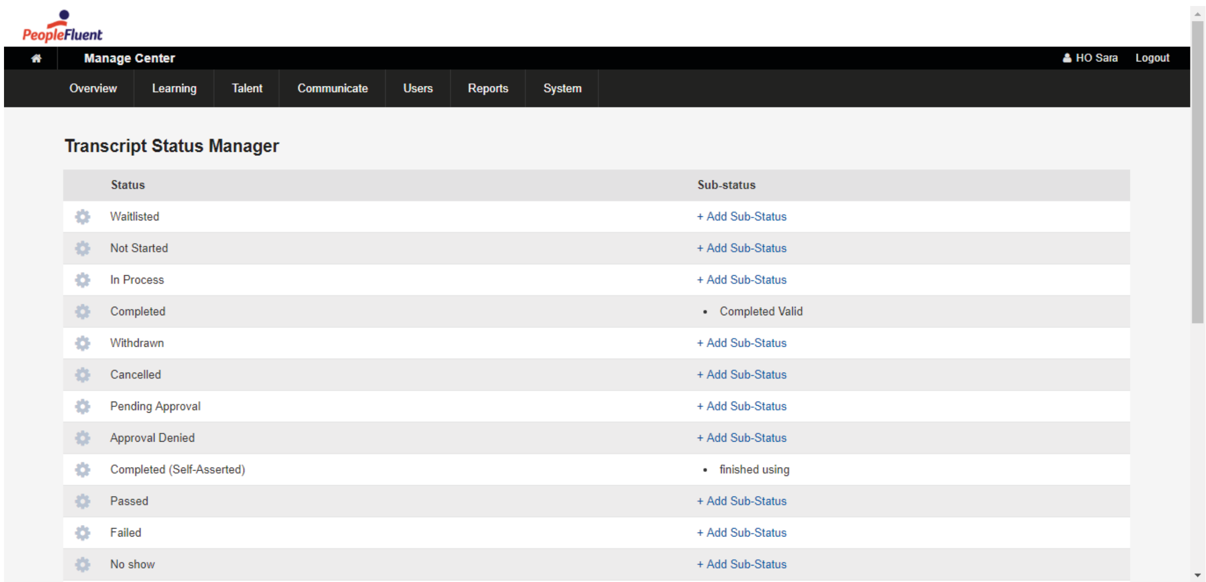
Display Areas

Use display areas configuration to control where the attribute should appear. For example, enabling "Te ach Session Administration" will cause the session attribute to appear on the Teach > Session Administration page as a filter for session search by this attribute:



Transcript Status Manager

Manage Center > Learning > Catalog Configuration > Transcript Status Manager lists all available transcript statuses:



Permissions Per Transcript Status

You can set permissions per transcript status:

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

You can access the permissions selector by clicking on "permissions" in the context menu of the status in Transcript Status Manager.

The status permissions will be reflected in the following locations:

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

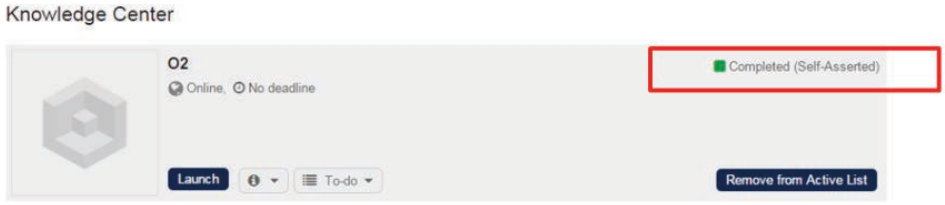
Transcript Statuses

The state of a learner's enrollment on a particular session can be one of a number of statuses:

	Status	Active	Creditable
1	Not Started	Yes	
2	In Process	Yes	
3	Waitlisted	No	
4	Dropped from Waitlist	No	
5	Withdrawn	No	
6	Withdraw - Valid Reason	No	
7	Withdraw - Invalid Reason	No	
8	Withdrawn - Account Closed	No	
9	Completed	No	Yes
10	Completed (Self-Asserted)	No	Yes
11	Cancelled	No	
12	Pending Approval	Yes	
13	Approval Denied	No	
14	Passed	No	
15	Failed	No	
16	No show	No	
17	Deactivated	No	
18	Deadline Expired	No	
19	Session Selection Needed	Yes	
20	Waiver/Exempt	No	Yes
21	Excused	No	

Completed (Self-Asserted)

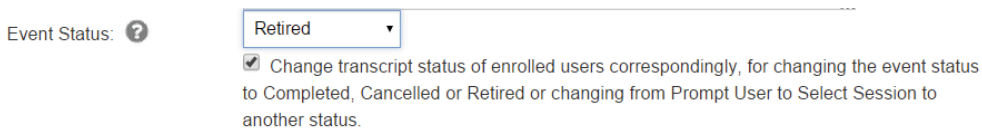
"Completed (Self-Asserted)" is a distinguished form of completion, one that is self-asserted by the learner. Its status change can only be invoked by the learner (eg. when marking non-trackable content as complete or just simply clicking the "Completed" button in the Knowledge Center before the track-able content being recognized as complete by the courseware). "Completed (Self-Asserted) will contribute to certificate award and competency acquisition.



Deactivated

The "Deactivated" status caters for closing out an active enrollment. "Deactivated" is a terminal status but it will not contribute to certificate or competency acquisition. It is available as an administrative action, including the participants section in Catalog Editor, Enrollment Wizard, Teach Review Participants, status change on authorized payment in Payment History, CSV loader and API. On automatic program completion roll-up, if any elective sub-module(s) are incomplete or have been completed through equivalent learning, the transcript will be set to "Deactivated".

When retiring a course session, changing transcript status of enrolled users sets their transcripts to "Deactivated":



Transcript Sub-Statuses

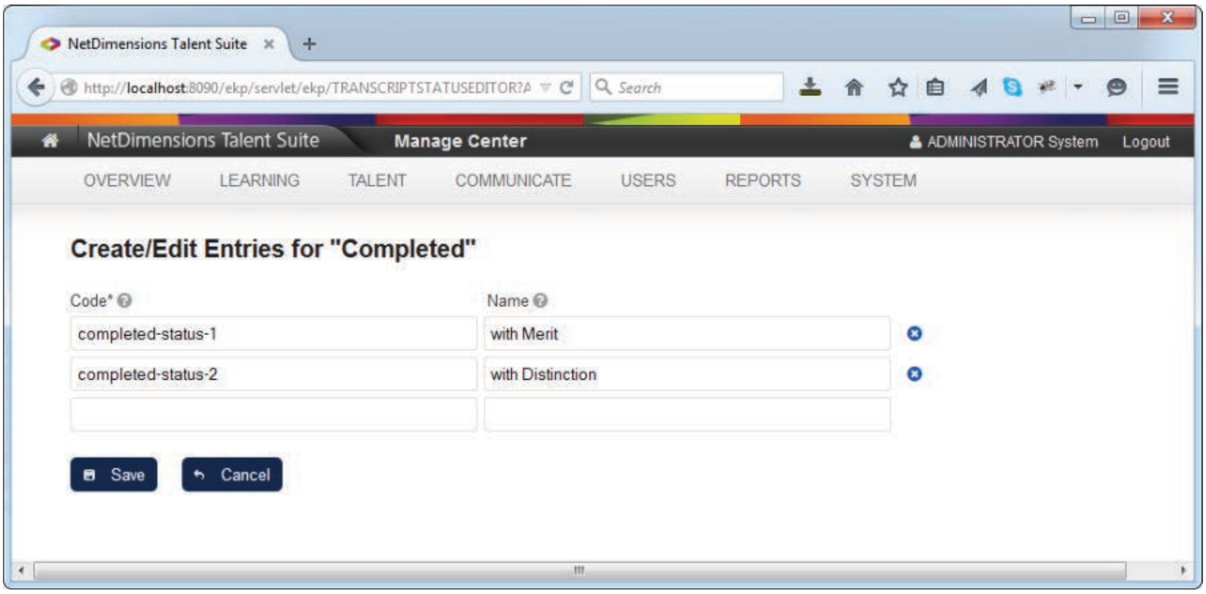
You can create sub-statuses to sub-categorize each Transcript Status. For example,

- "Completed" could be further classified as "with Merit" or "with Distinction"
- "Waiver/Exempt" could be "Equivalent Qualification" or "Experience Waiver"
- "Excused" could be "Illness/Injury" or "Bereavement" or "Jury Service"

These can be customized, captured, and reported in the system.

To configure sub-statuses:

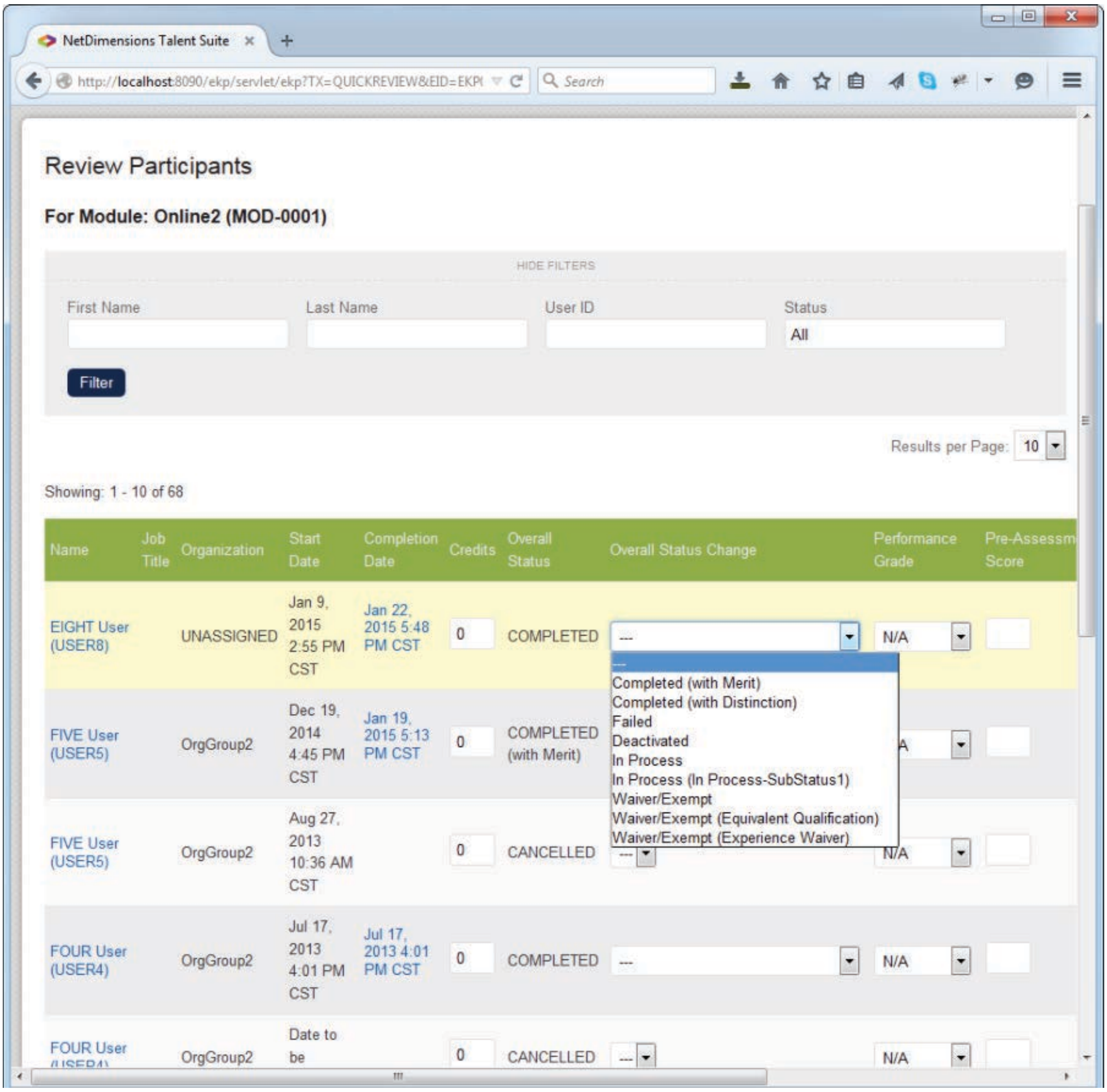
1. Click on "+ Add Sub-Status" link
2. Enter the sub-status code, the name is optional. The code should be unique across different statuses. And the name field is a meaningful label for the sub-status.



A screen capture of the Transcript Sub-Status edit page

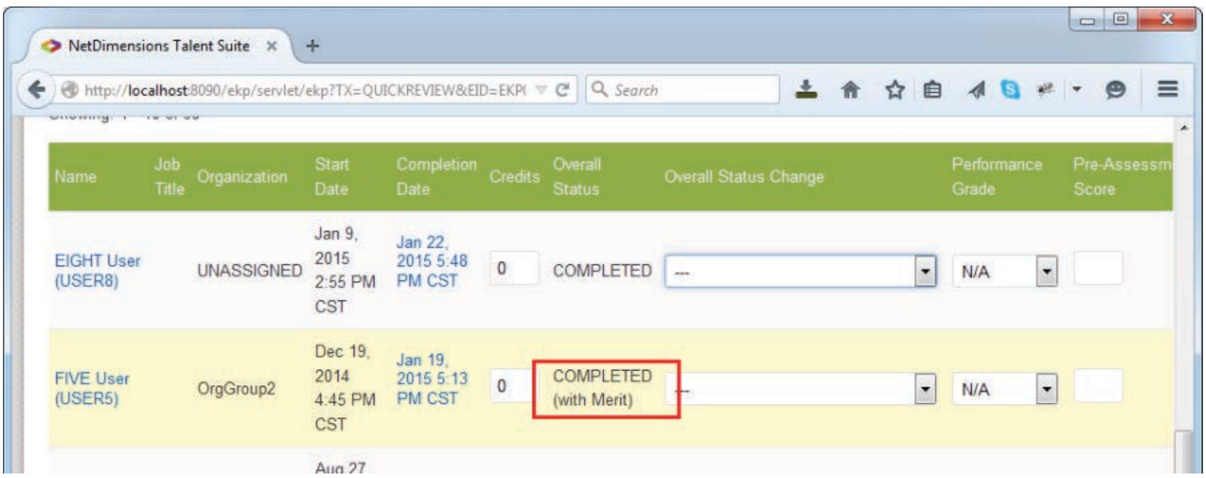
Once configured, the sub-statuses will be available for you to apply when setting learner transcript statuses.

Transcript Sub-status on Teach Review Participants Page



Overall Status Change at Teach Review Participant page

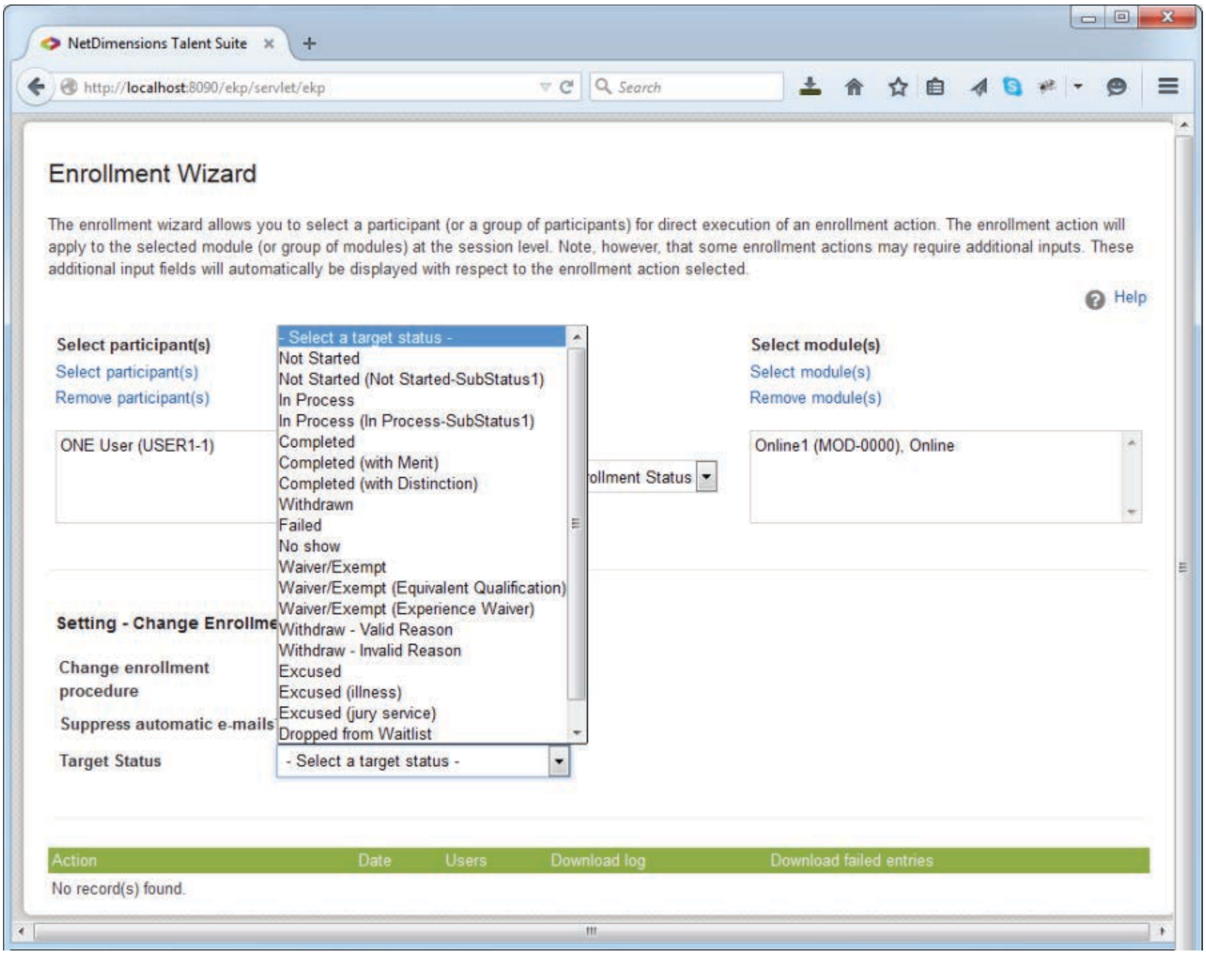
On the Overall Status Change column, a drop-down menu of all available status with sub-statuses based on permissions is displayed with the format of "Overall Status (Sub-status)". For example, There can be three options for the Completed Status, which are "Completed", "Completed (with Merit)" and "Complete (with Distinction)". After the overall status change is updated, the Overall Status column will reflect the corresponding status with the sub-status details if applicable.



Overall Status column show status with sub-status detail

Transcript Sub-Statuses at Enrollment Wizard

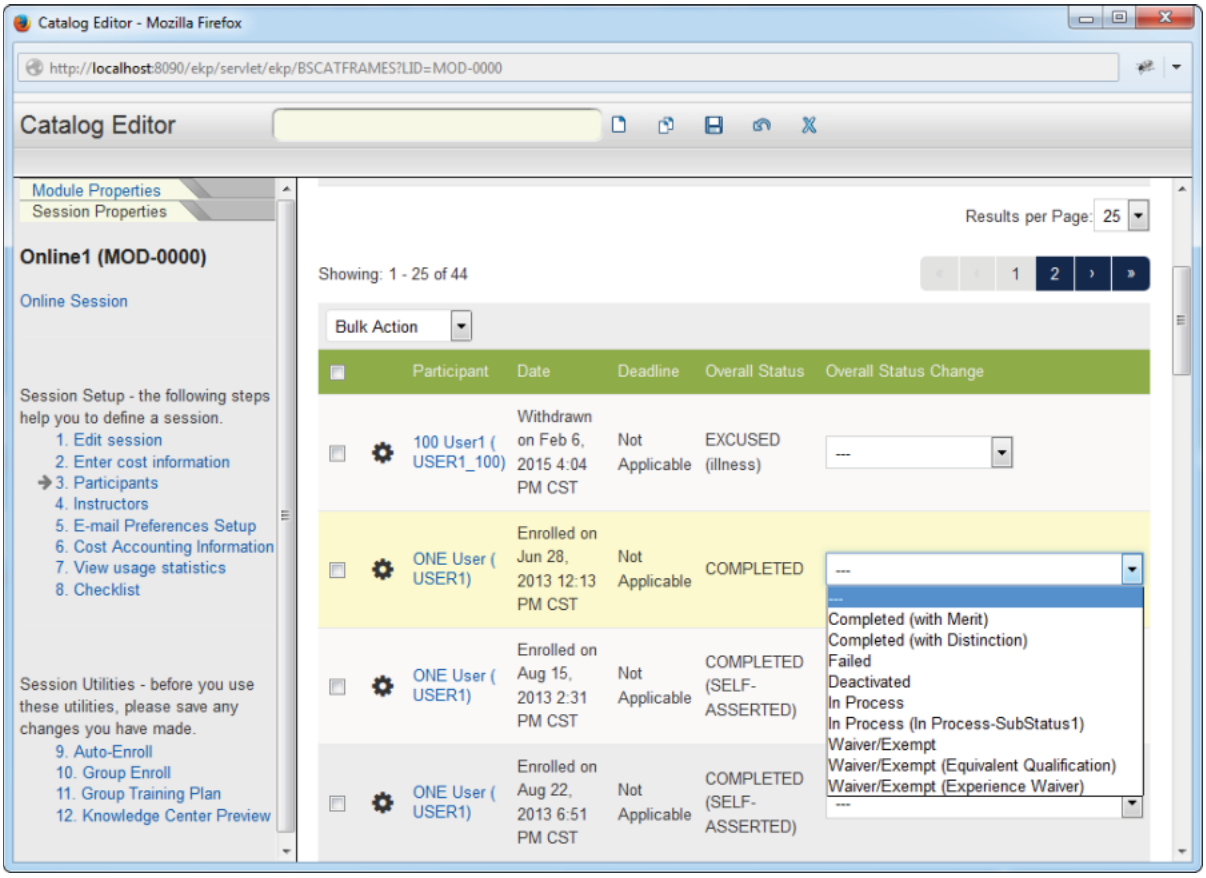
Transcript sub-statuses can also be applied at Enrollment Wizard when using the "Change Enrollment Status" function:



Target status drop-down menu list with transcript sub-status options

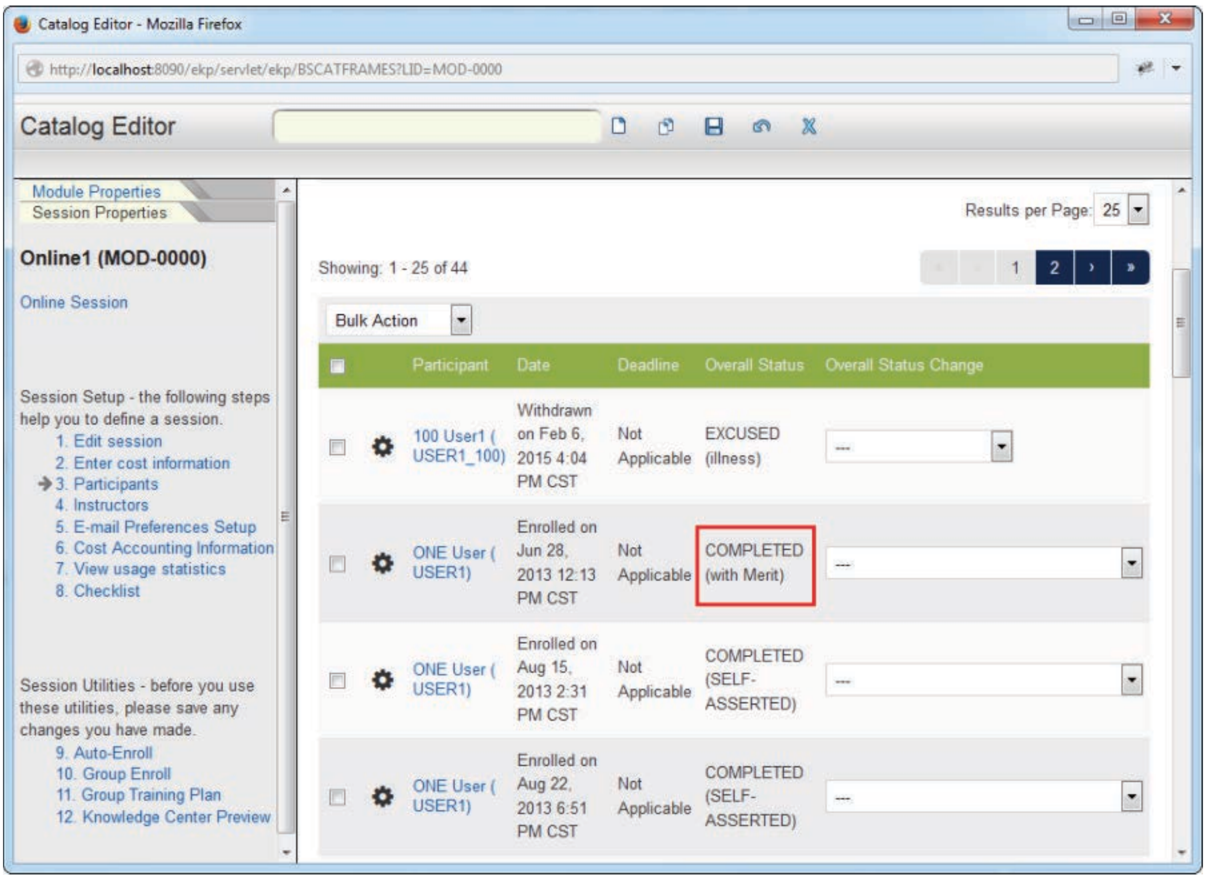
Transcript Sub-Statuses at Catalog Editor

Transcript sub-status selection is also available via the Catalog Editor -> Session Properties -> Participants:



Transcript Status drop-down list with sub-statuses at Catalog Editor

After saving the sub-status selection, the new overall status with sub-status will be shown at the Overall Status column on the records table if applicable:

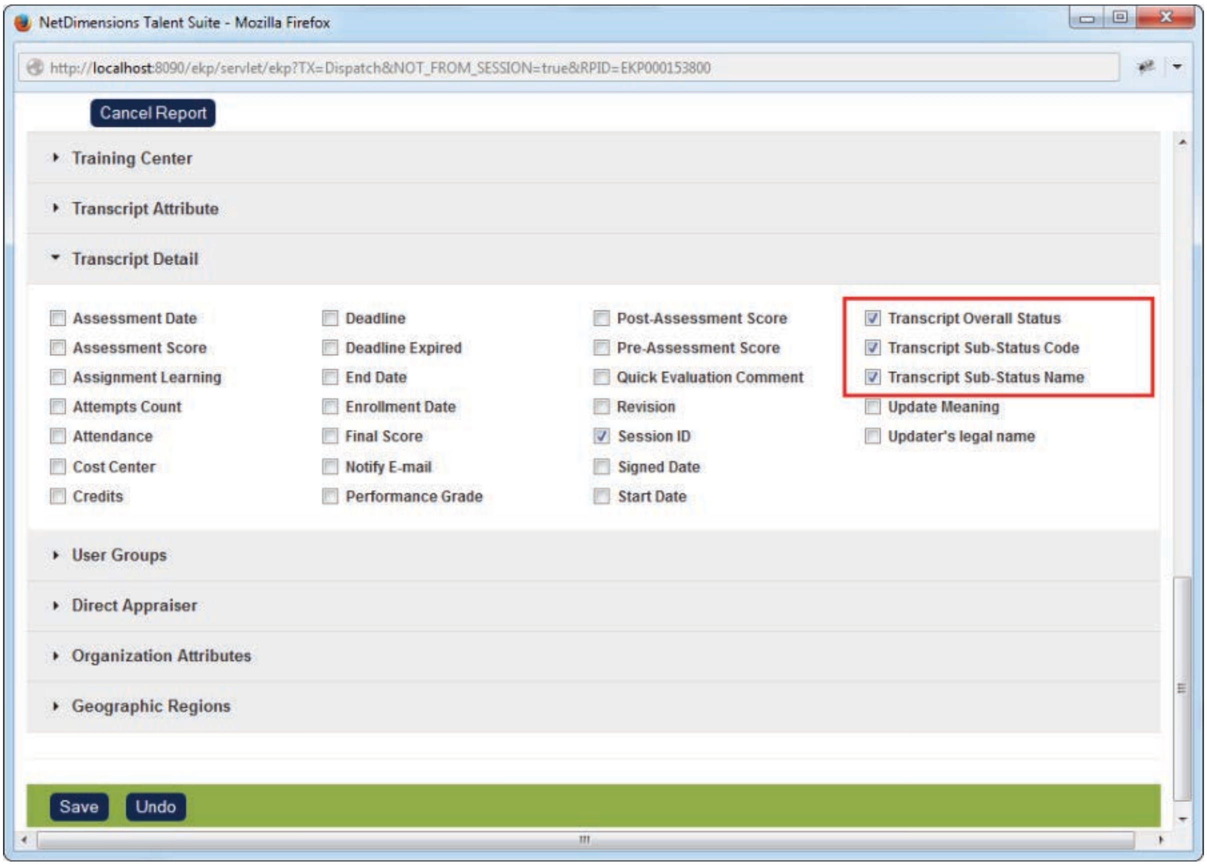


Overall Status column with sub-status info at Participant table

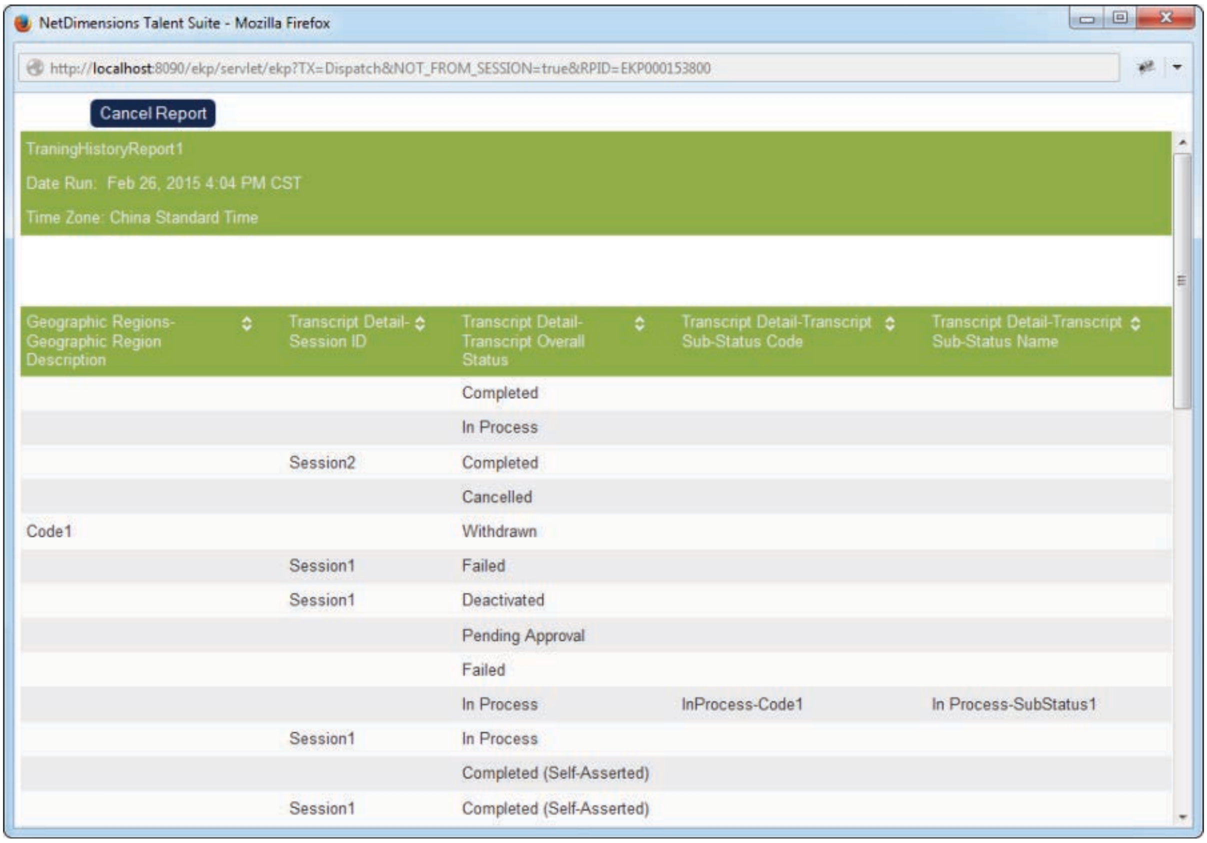
Transcript Sub-Statuses in Report Wizard

On top of viewing the sub-status information in the various places on the interface, the additional information can be reported via the Report Wizard. There are currently three relevant columns showing sub-status details:

- ***Transcript Overall Status:*** The Status along with any sub-status information of the learner's transcript
- ***Transcript Sub-Status Code:*** The Code of the Transcript Sub-Status that has been assigned to the learner's transcript
- ***Transcript Sub-Status Name:*** The Name of the Transcript Sub-Status that has been assigned to the learner's transcript



Transcript Status related column options at Transcript Detail tab on Report Wizard



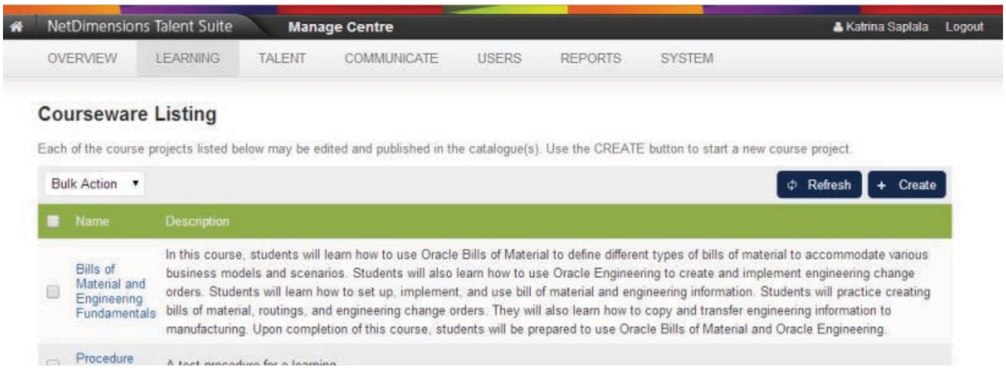
Geographic Regions-Geographic Region Description	Transcript Detail-Session ID	Transcript Detail-Transcript Overall Status	Transcript Detail-Transcript Sub-Status Code	Transcript Detail-Transcript Sub-Status Name
		Completed		
		In Process		
	Session2	Completed		
		Cancelled		
Code1		Withdrawn		
	Session1	Failed		
	Session1	Deactivated		
		Pending Approval		
		Failed		
		In Process	InProcess-Code1	In Process-SubStatus1
	Session1	In Process		
		Completed (Self-Asserted)		
	Session1	Completed (Self-Asserted)		

Transcript Status related columns display on a generated report

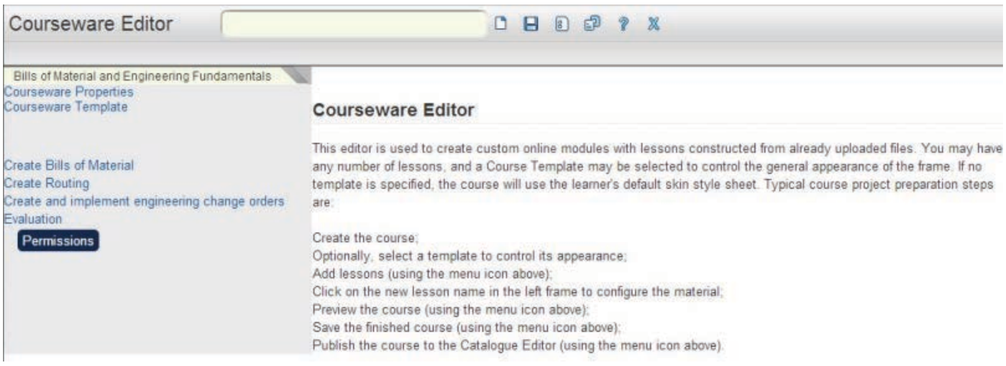
Courseware Editor

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

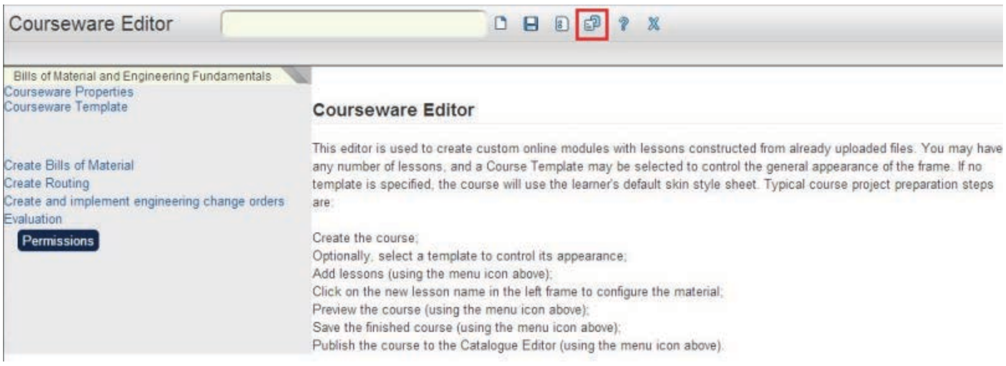
1. Create a new Courseware project or open an existing Courseware project in Courseware Editor. Click **Manage Center > Learning > Courseware Manager > Courseware Listing**.



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



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



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

Class Resource Manager

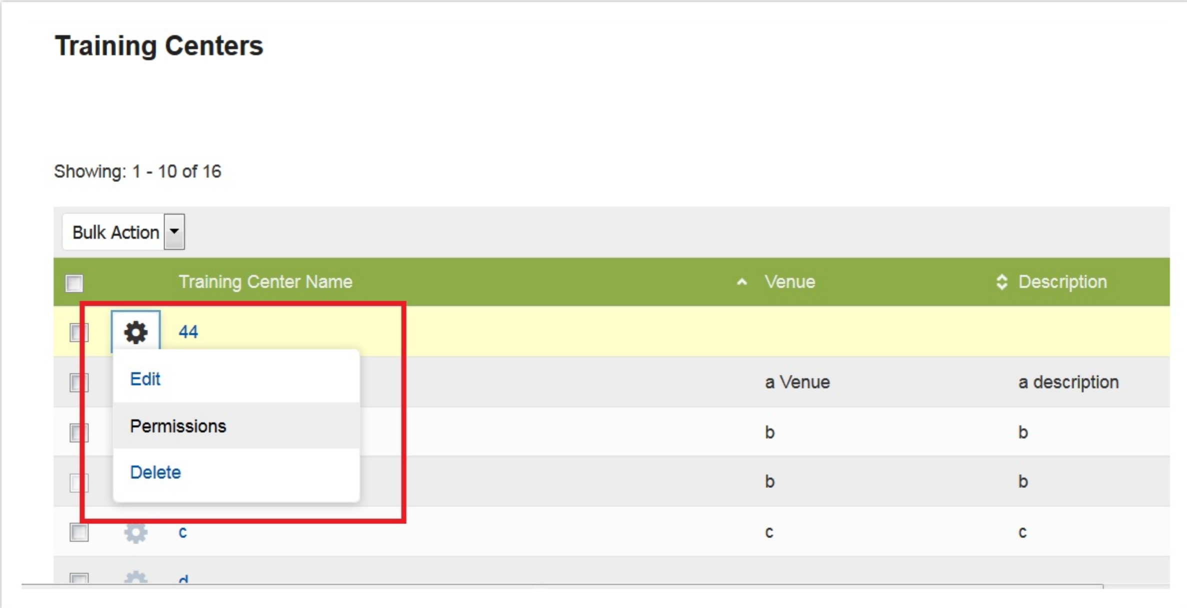
(available for Performance and Learning only)

The LMS offers a comprehensive class resource management section that allows booking of rooms, instructors, and material such as projectors, whiteboards, notepads and the like. This is accessible under Manage Center > LEARNING > CLASS RESOURCE MANAGER.

Training Centers

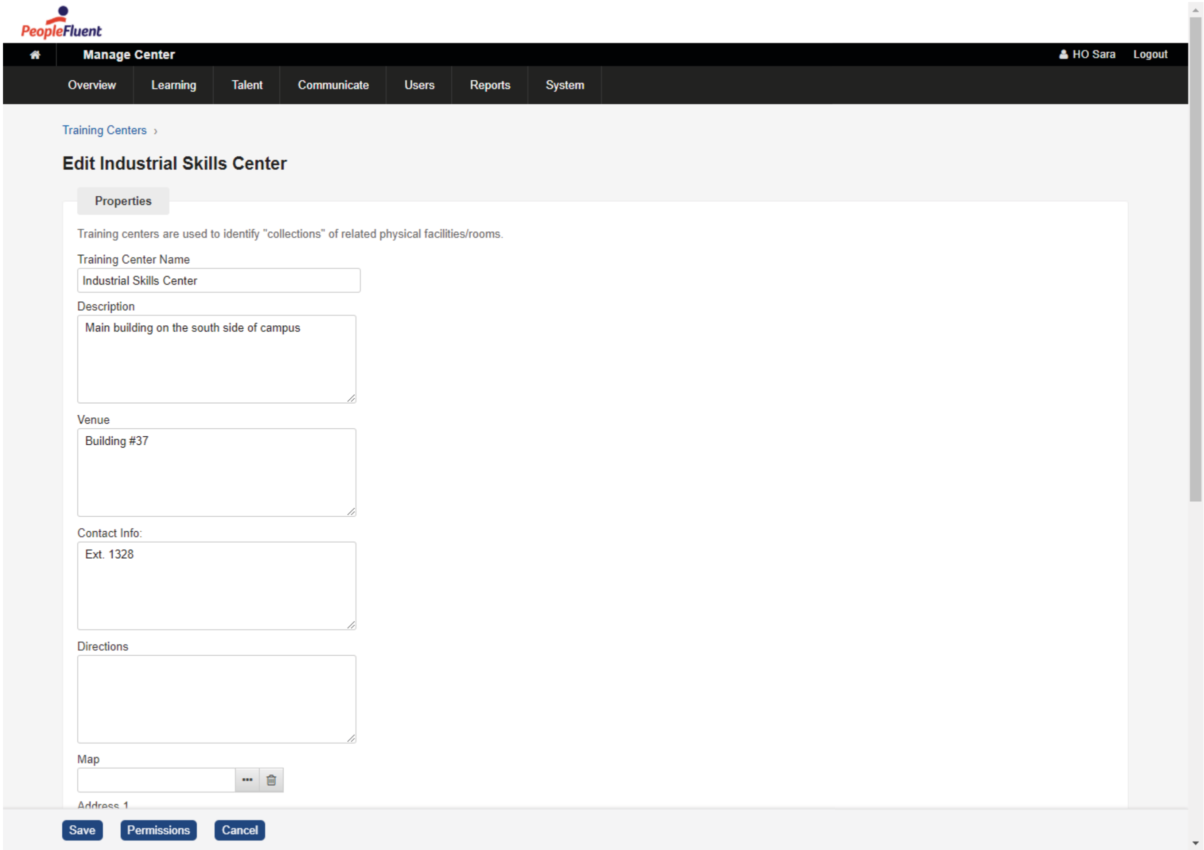
The Training Centers section can be found at Manage Center > LEARNING > CLASS RESOURCE MANAGER > Training Centers. Here, administrators are presented with a list of all Training Centers in the system with options to:

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



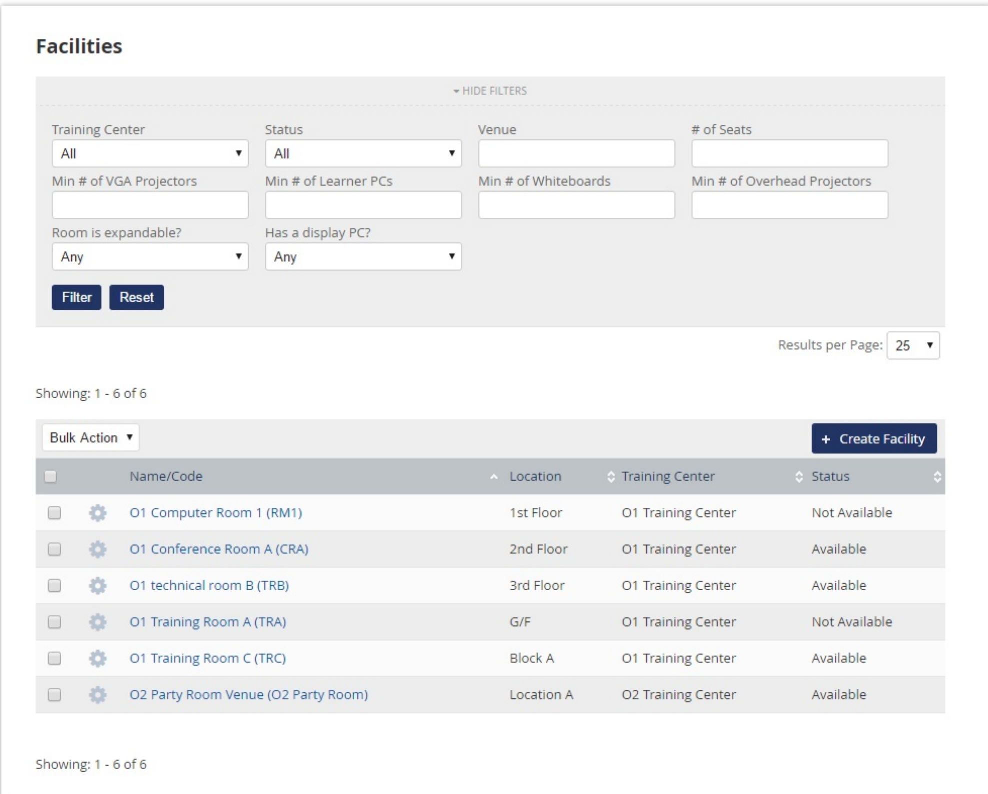
Training Centers have the following properties:

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



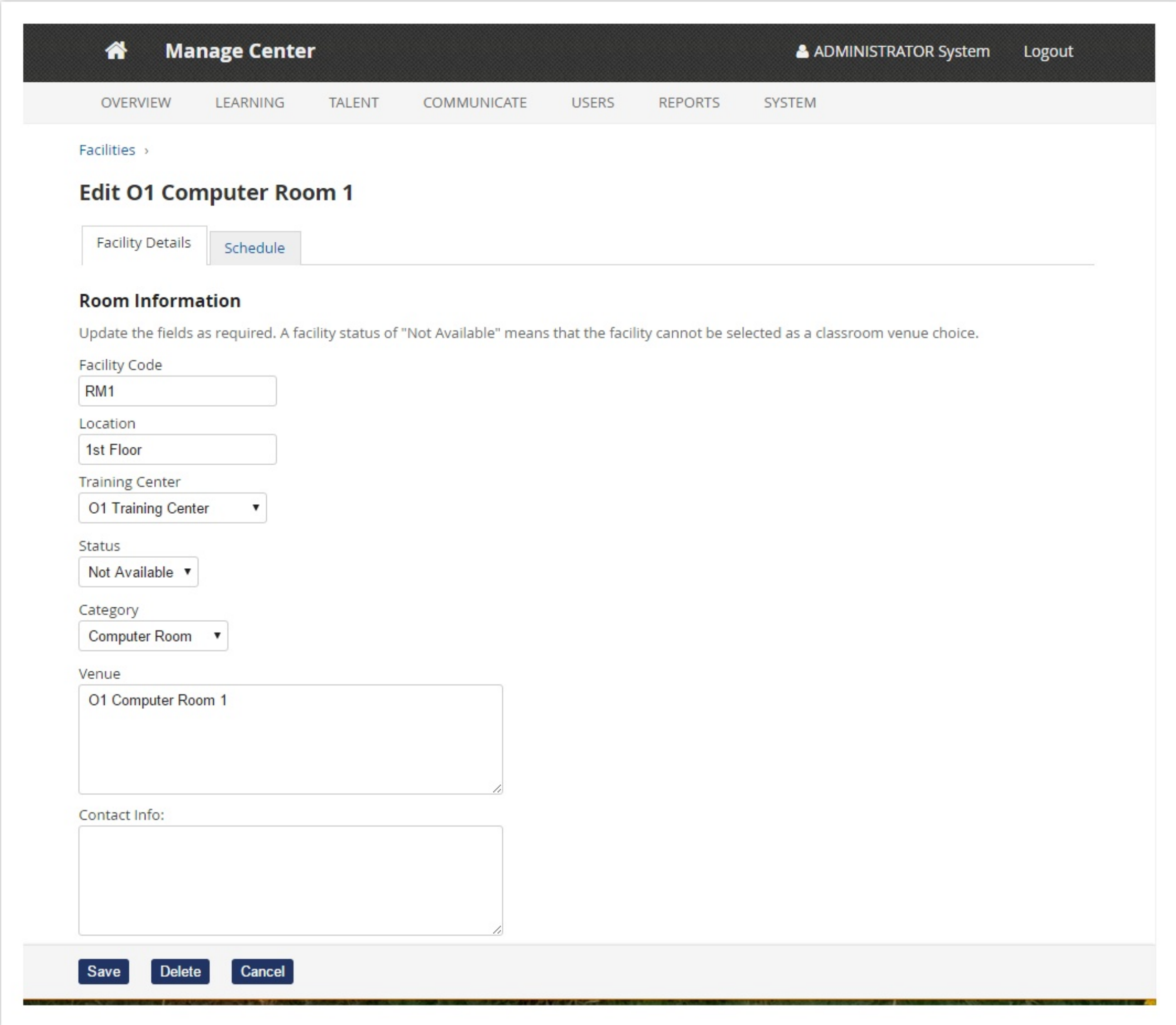
Facilities

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



Depending on access control and permissions, you can:

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



Facilities have the following properties:

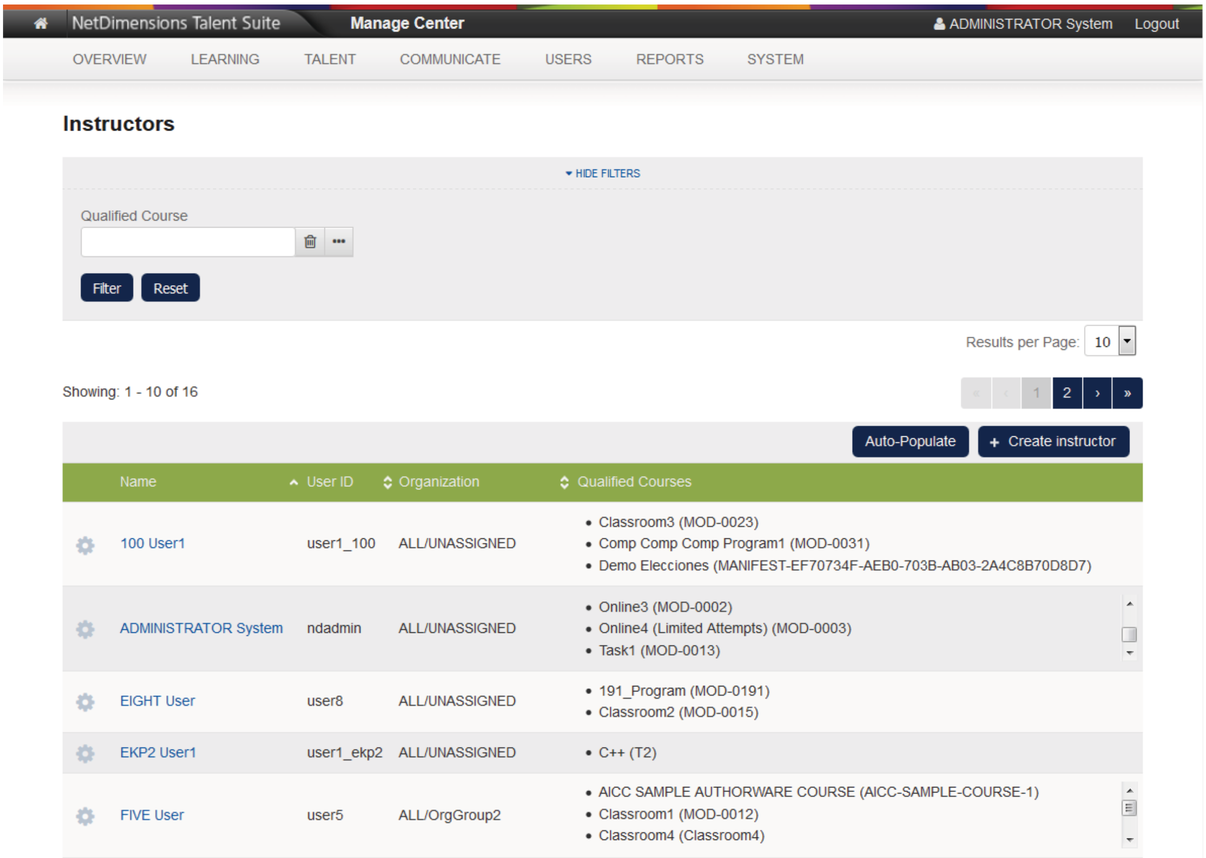
1. Facility Code
2. Location
3. Training Center
4. Status
5. Category
6. Venue
7. Contact Info
8. Directions
9. Map
10. Expandable
11. Moveable Seating
12. Has a display PC?
13. Video Conferencing
14. Minimum # of Seats
15. Maximum # of Seats
16. # of VGA Projectors
17. # of Monitors
18. # of Overhead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

21. # of Interactive Whiteboards

Instructors

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

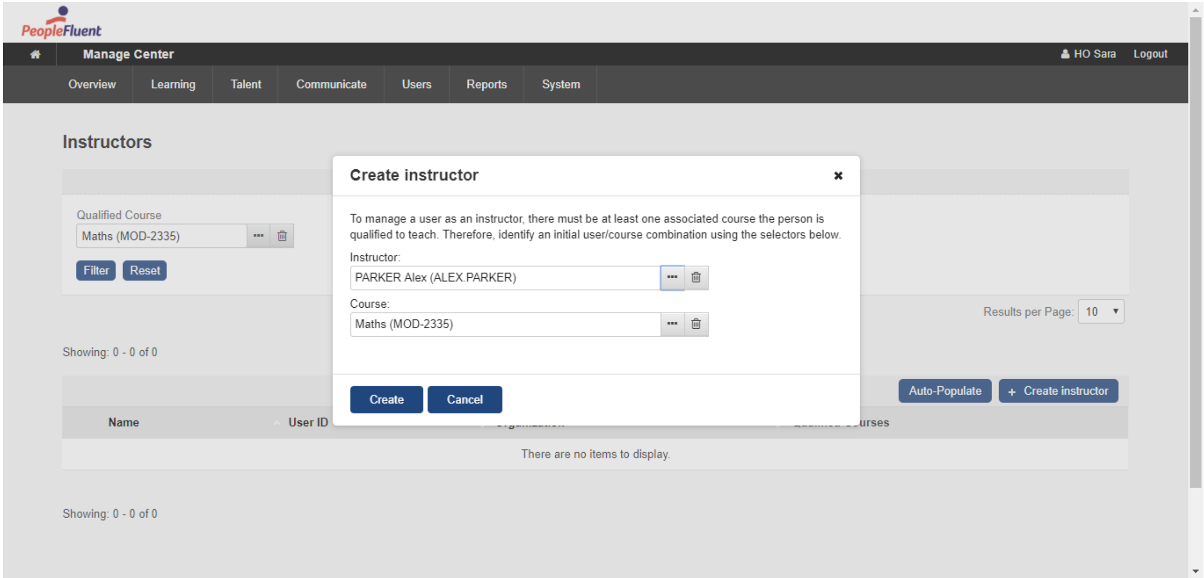
1. Create an Instructor
2. Auto-Populate Instructors
3. View an Instructor's Profile
4. Edit an Instructor's Qualified Courses
5. View an Instructor's Schedule



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

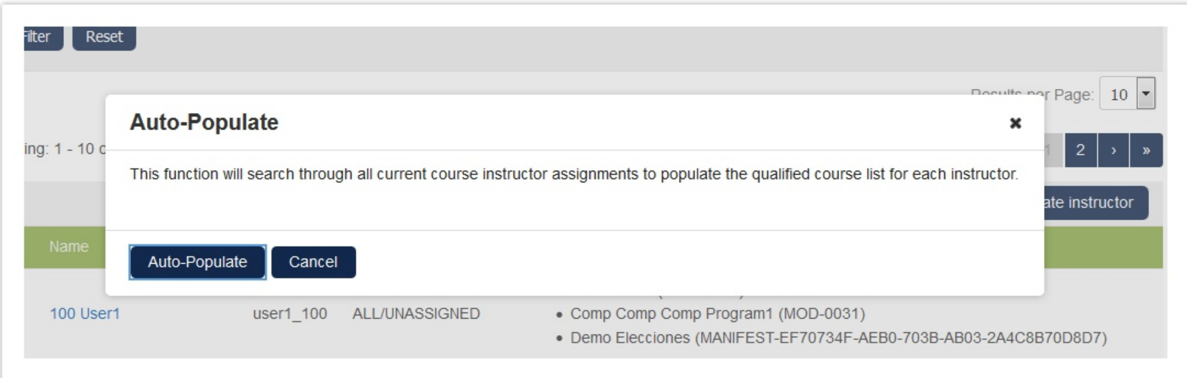
Creating An Instructor

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

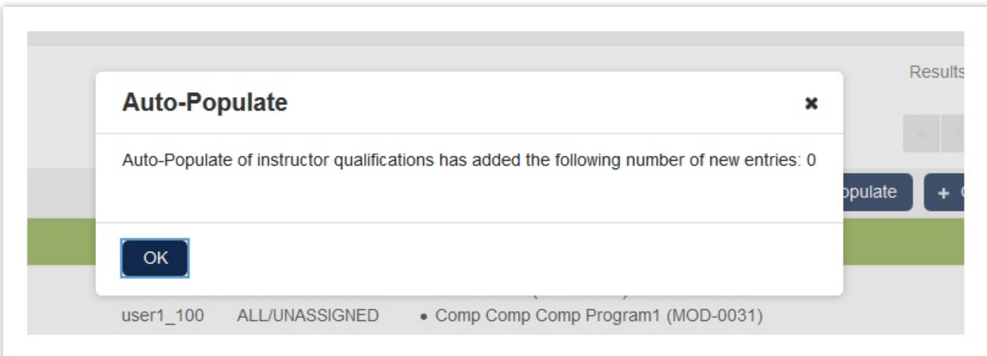


Auto-Populating Qualified Instructors

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

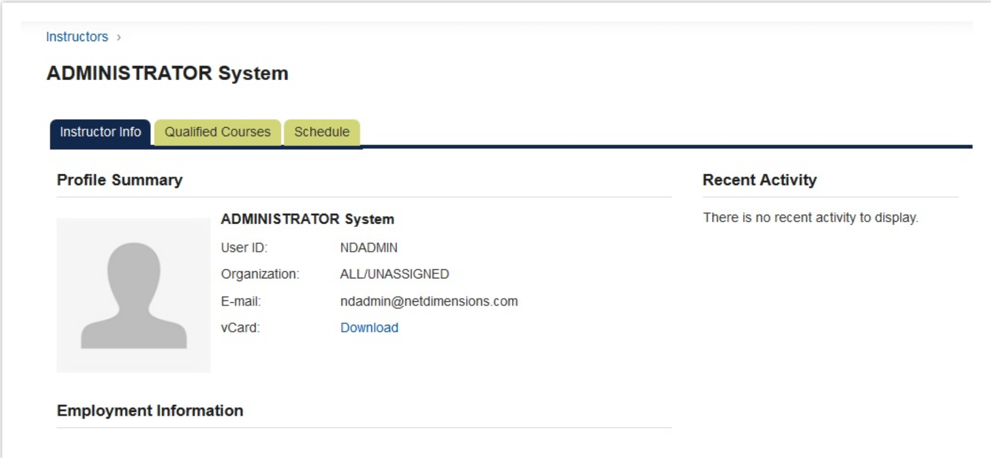


Another dialogue box will appear indicating if there are any new entries from that search.



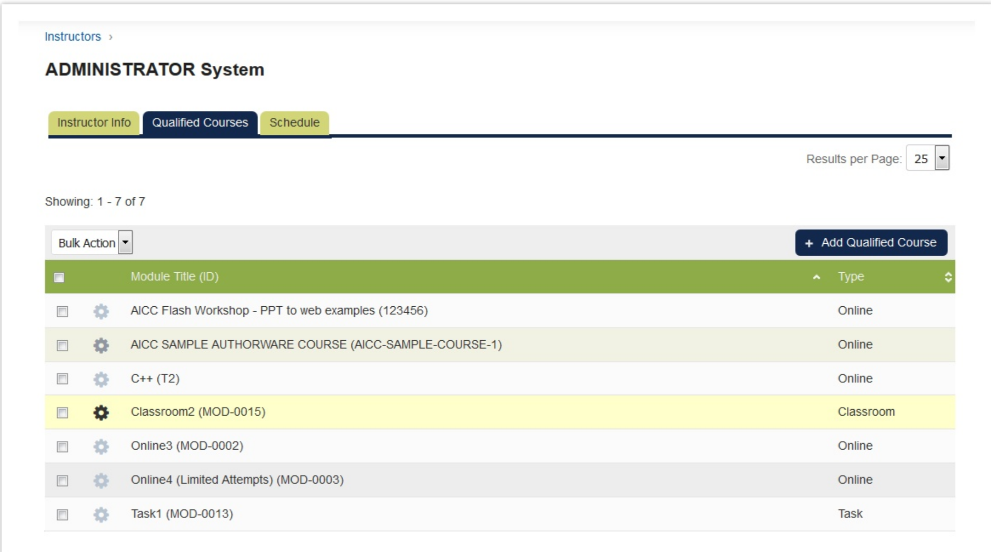
Viewing Instructor Profiles

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



Editing an Instructor's Qualified Courses

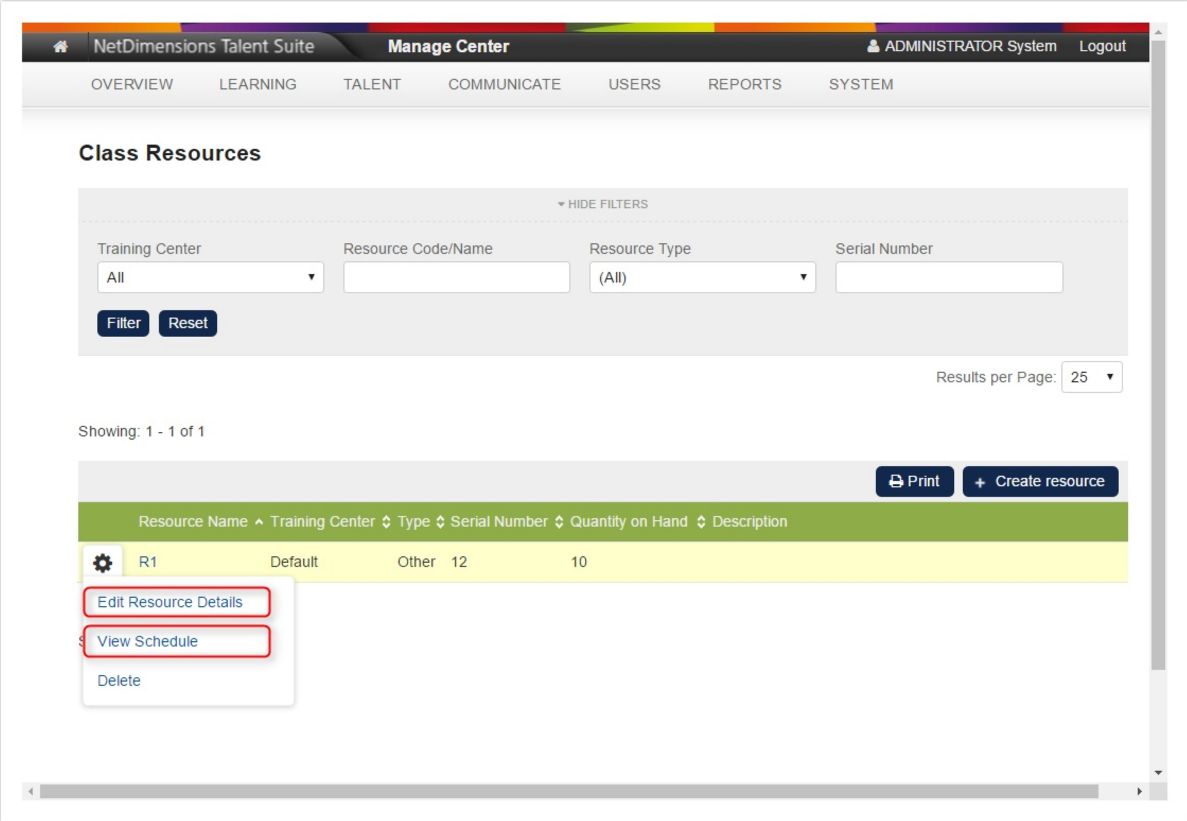
Clicking the "Qualified Courses" tab brings up the page for all courses listed for that Instructor. If there is any need to do further editing for each of those courses, it can be done here.



Resources

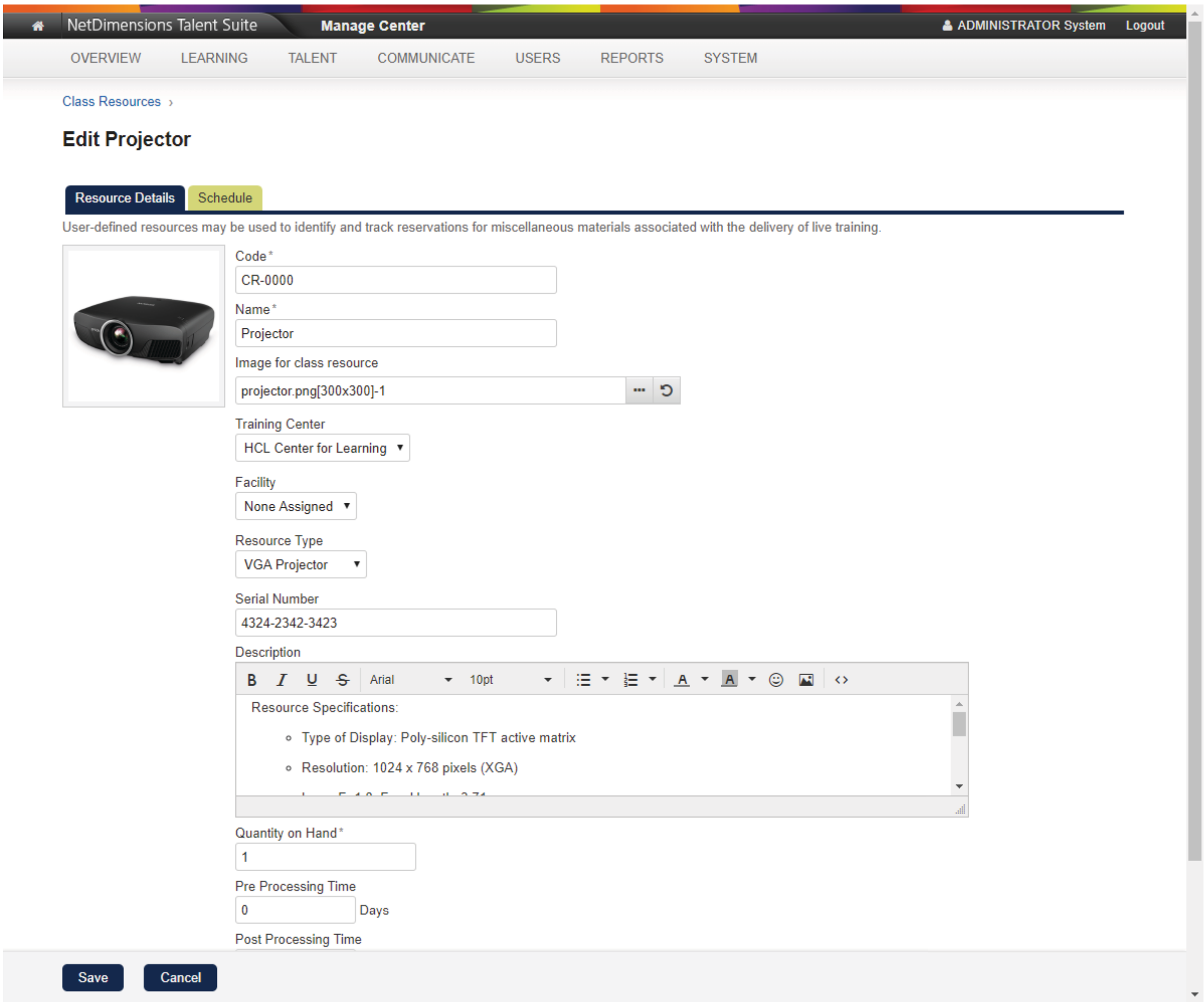
In addition to the standard resources listed on the facilities screen, you can add your own as needed. T hese are managed at Manage Center > LEARNING > CLASS RESOURCE MANAGER > Class Resources, where you can:

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



Class Resources have the following properties:

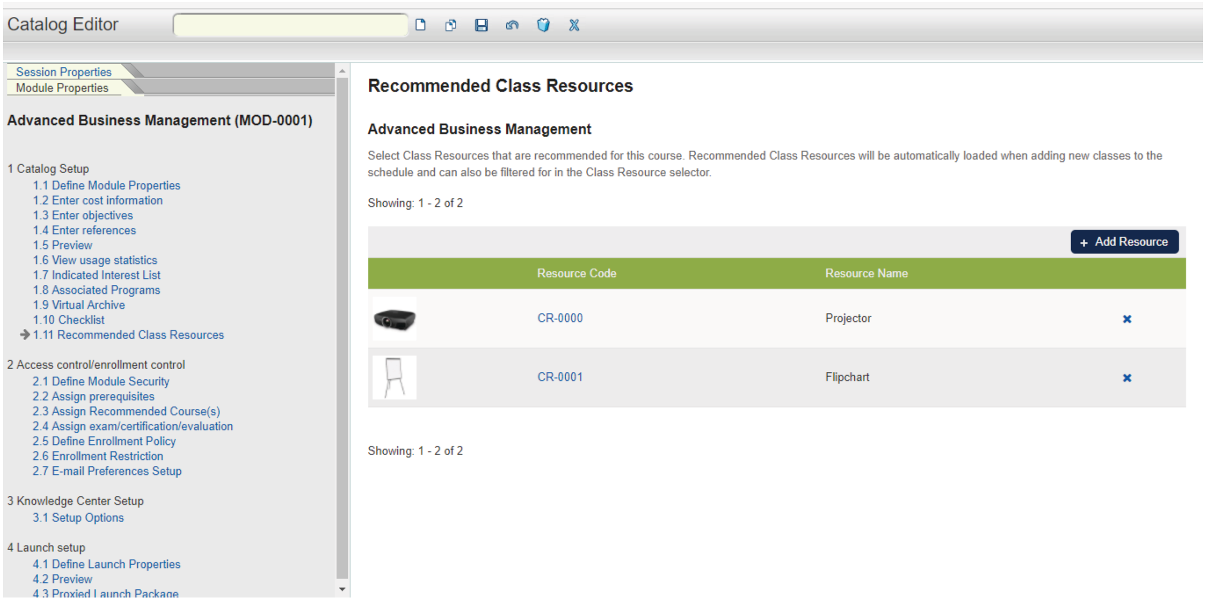
1. Code (Unique Identifier)
2. Name
3. Image
4. Training Center
5. Facility
6. Resource Type
7. Serial Number
8. Description
9. Quantity on Hand
10. Pre Processing Time
11. Post Processing Time



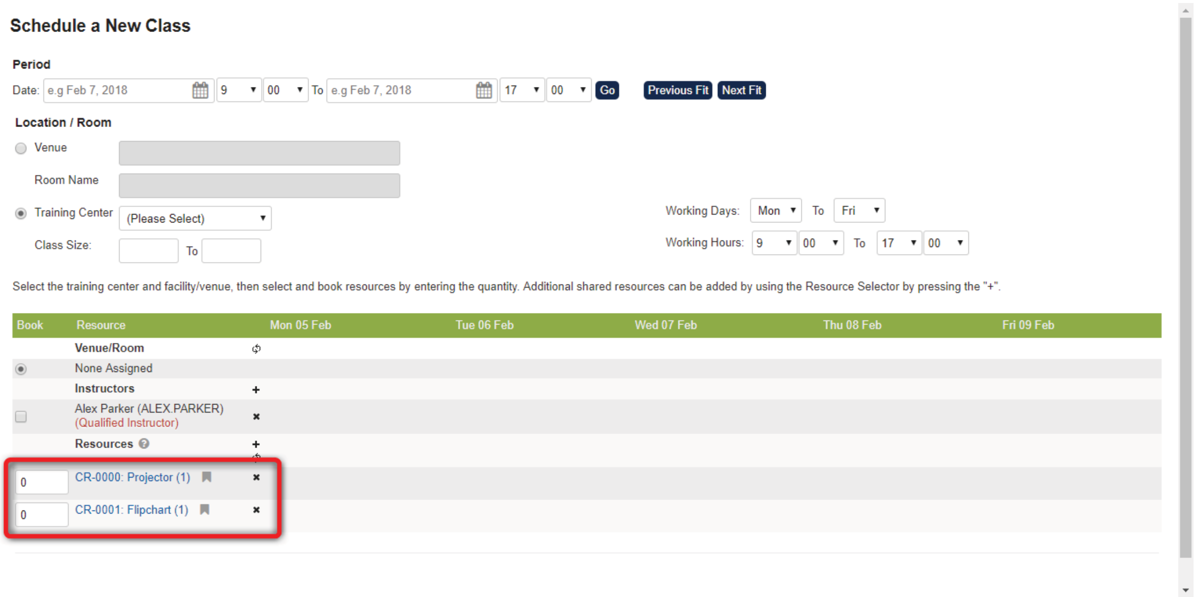
Recommended Class Resources

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

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



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

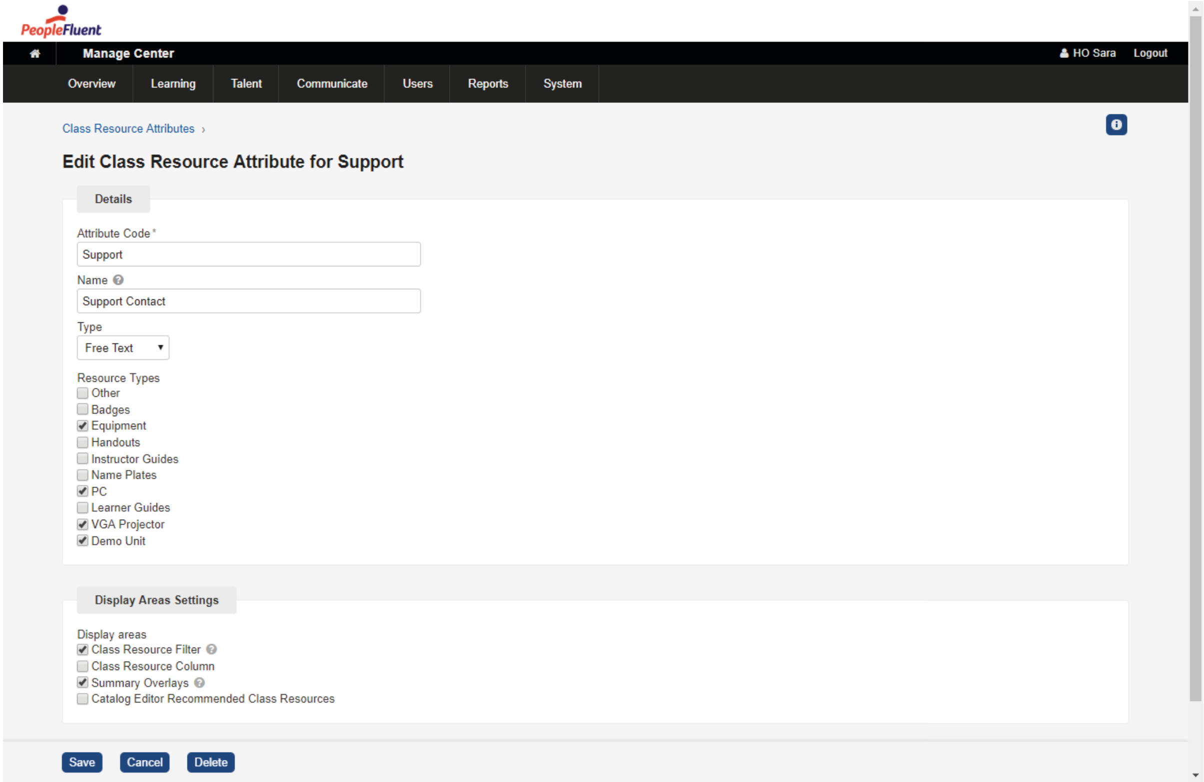


The Recommended Resources for a given course are also retrievable in the Resource selector (e.g. at the Resource Planner).

Class Resource Attributes

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

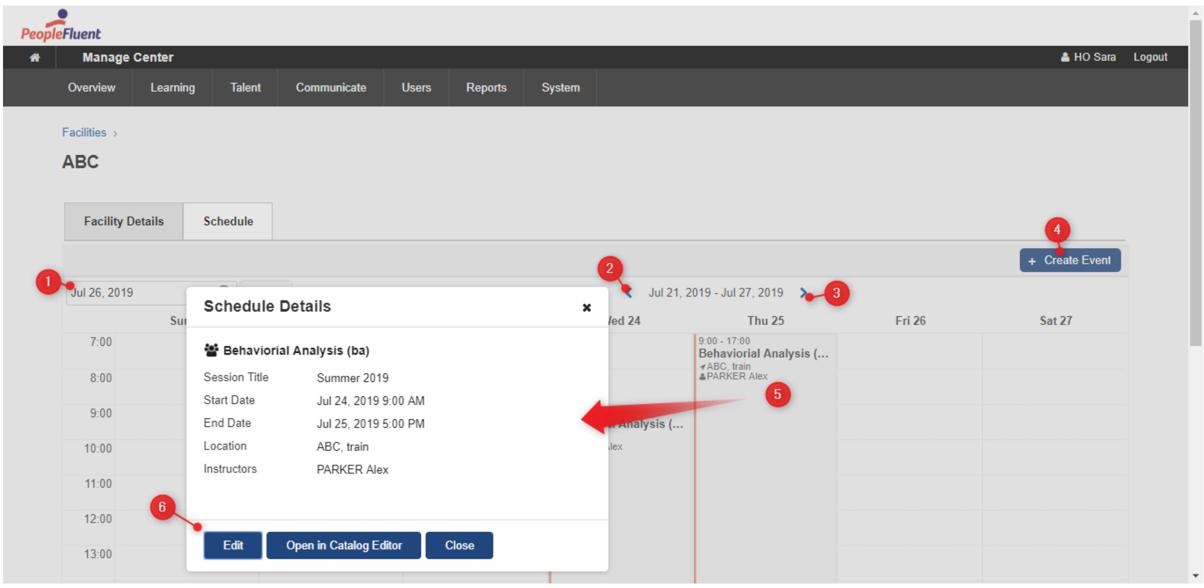
1. A Unique Code
2. A Name
3. The type (Free Text, Text Area, Drop Down, Numeric, Checkbox, Date, or File Selector)
4. Resource Types to which the attribute applies
5. Display Areas in which the attribute should appear



Facility, Instructor, and Resource Schedules

Viewing Schedules

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



From here, the Administrators can

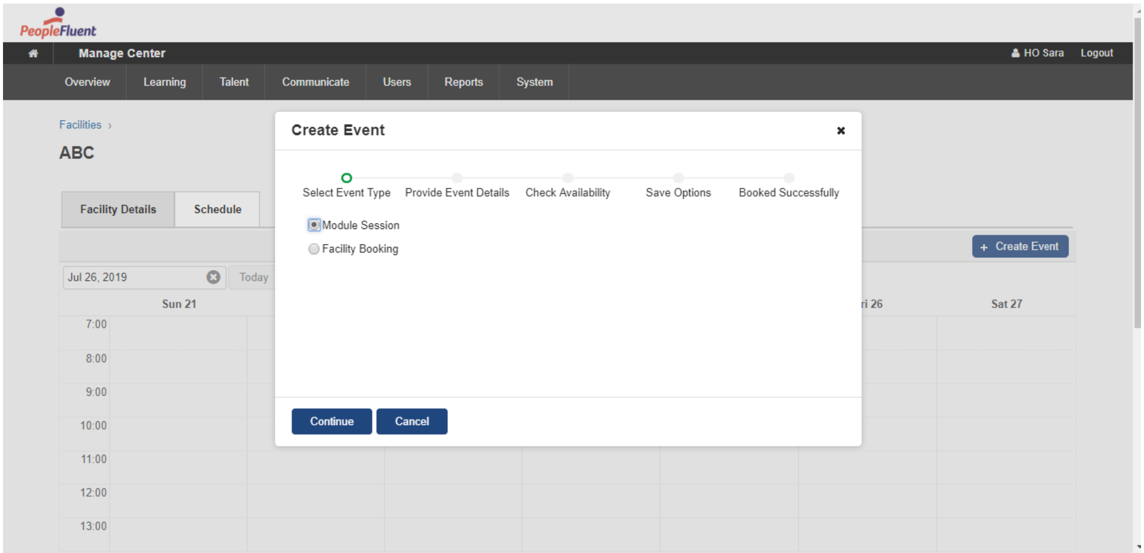
1. Jump to bookings in a specific week from the calendar
2. View bookings in the previous week
3. View bookings in the following week
4. Create an event

5. Click on an event chip to see further details in an overlay window
6. Depending on access controls, permissions, and object types
    a. Open the event in Catalog Editor
    b. Edit (and Delete) the event

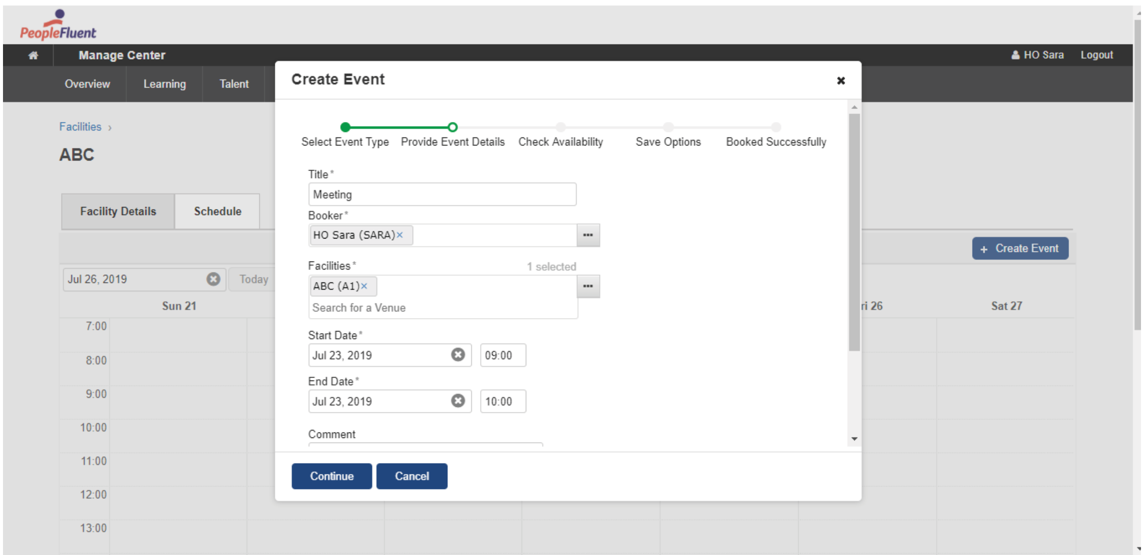
Creating Events

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

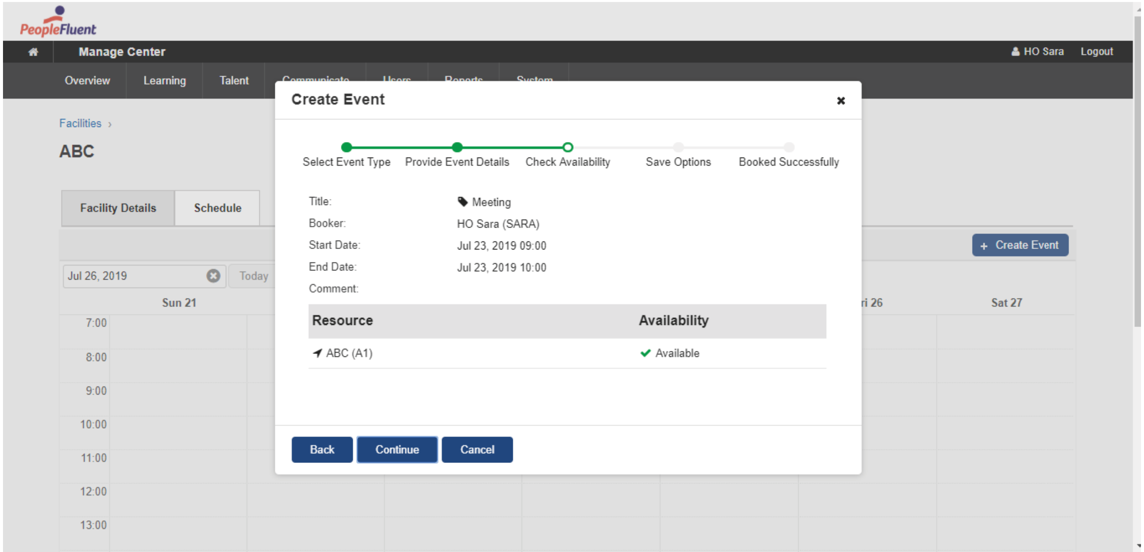
1. Click **Create Event** or the cell corresponding to the desired start time.
2. Select "Facility Booking" Event Type:



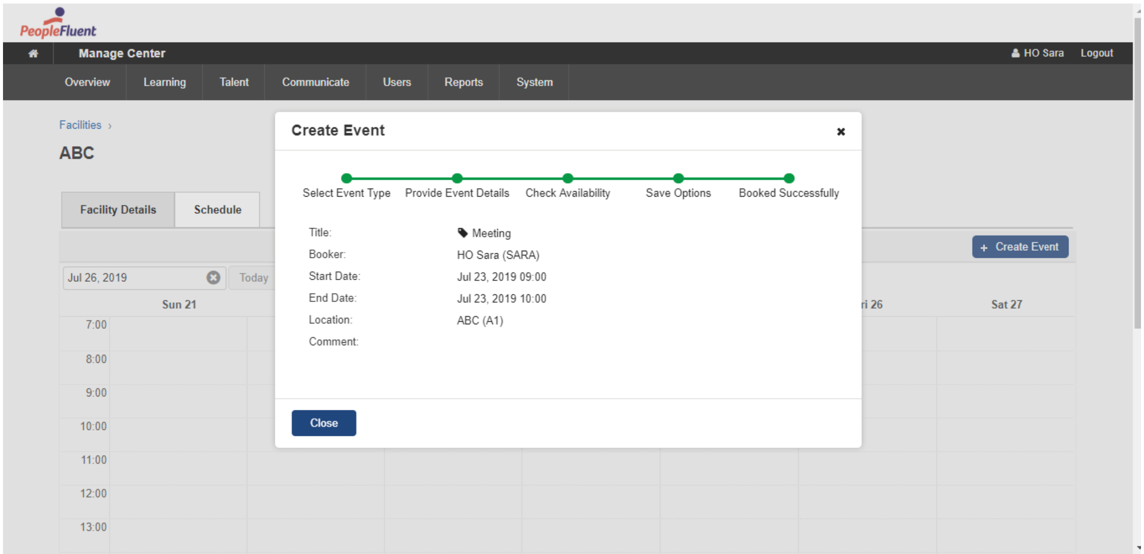
3. Provide the "Facility Booking" Event Details.



4. Check Availability and Confirm



5. View Event Summary.



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

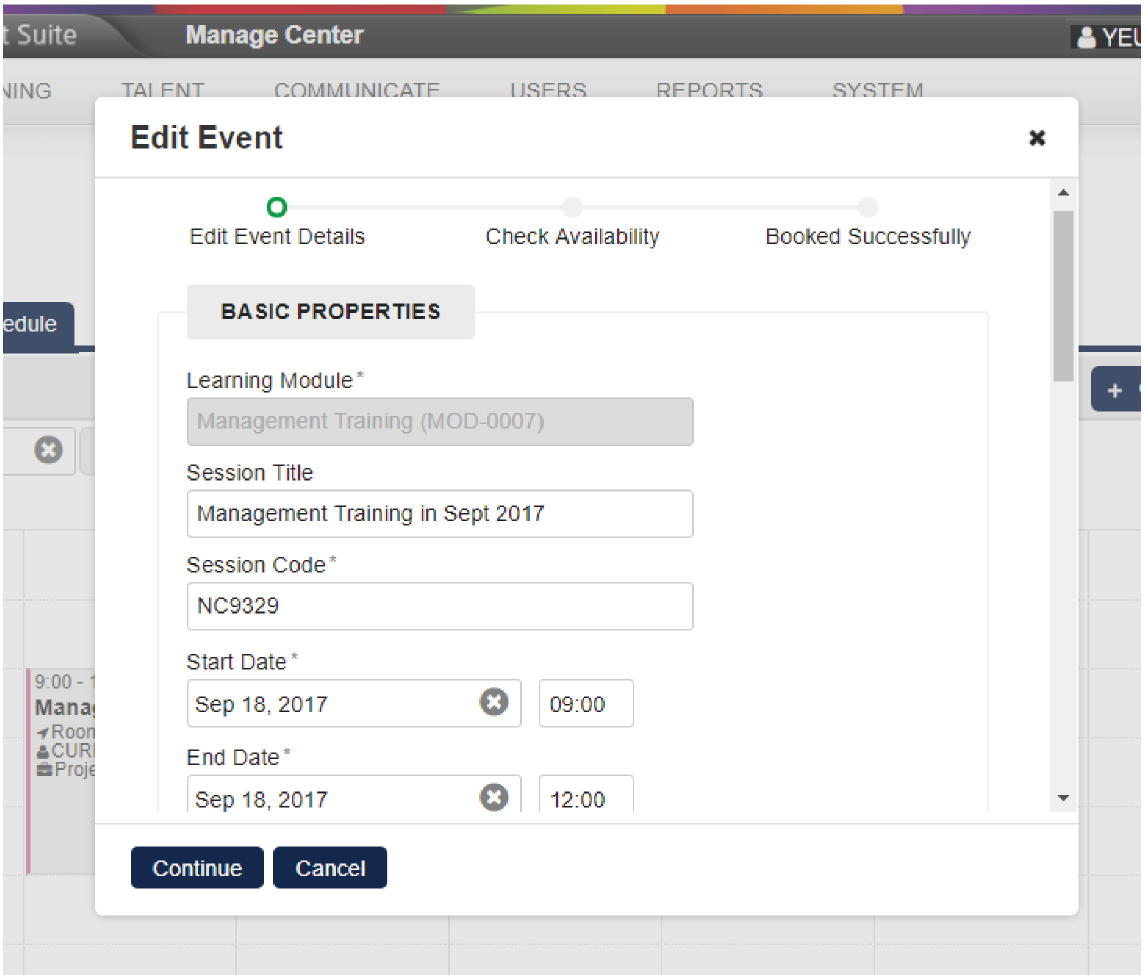
Editing Events

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

Direct Editing of Events

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

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

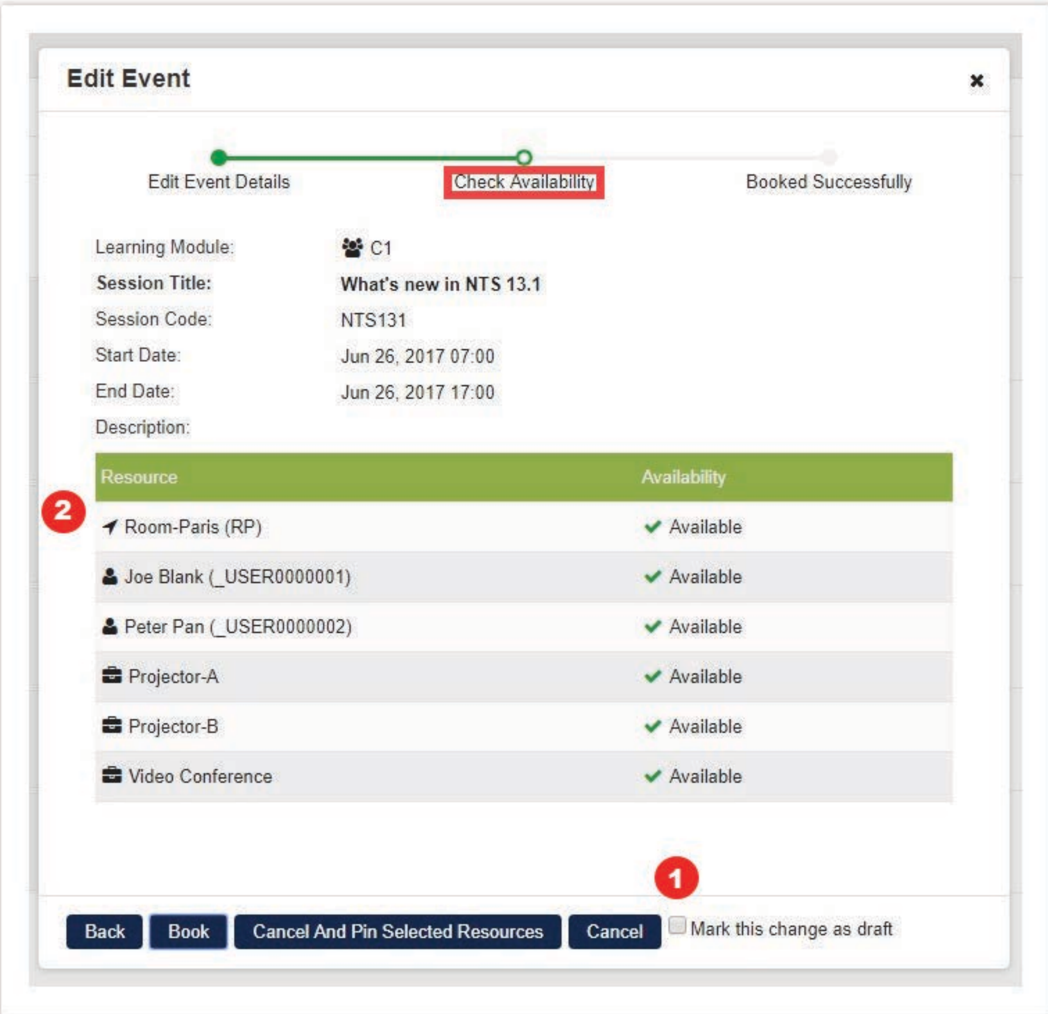


Similar direct editing flows are available for **Instructors** and **Facilities**.

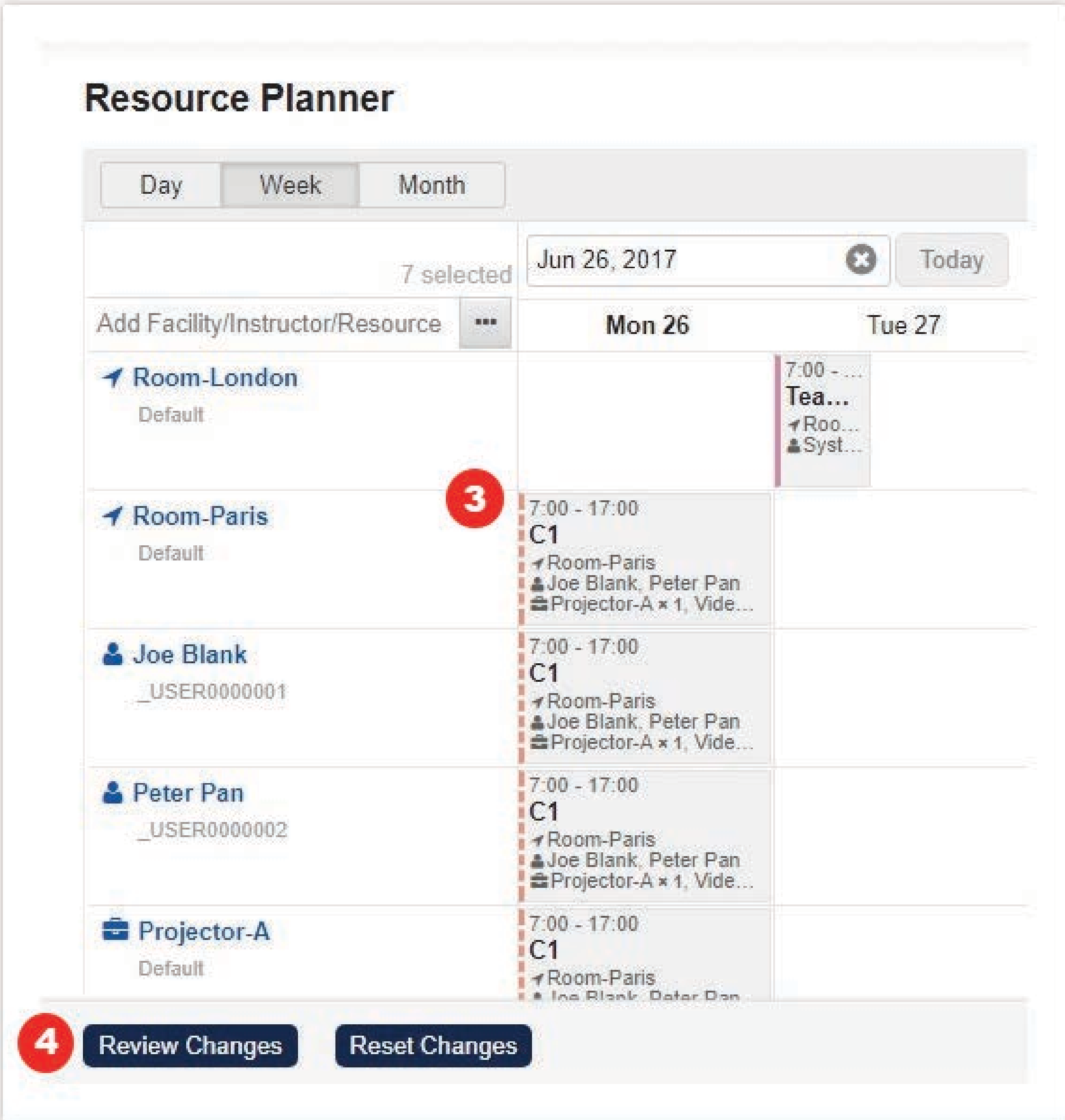
Drafting Changes for Module Sessions

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

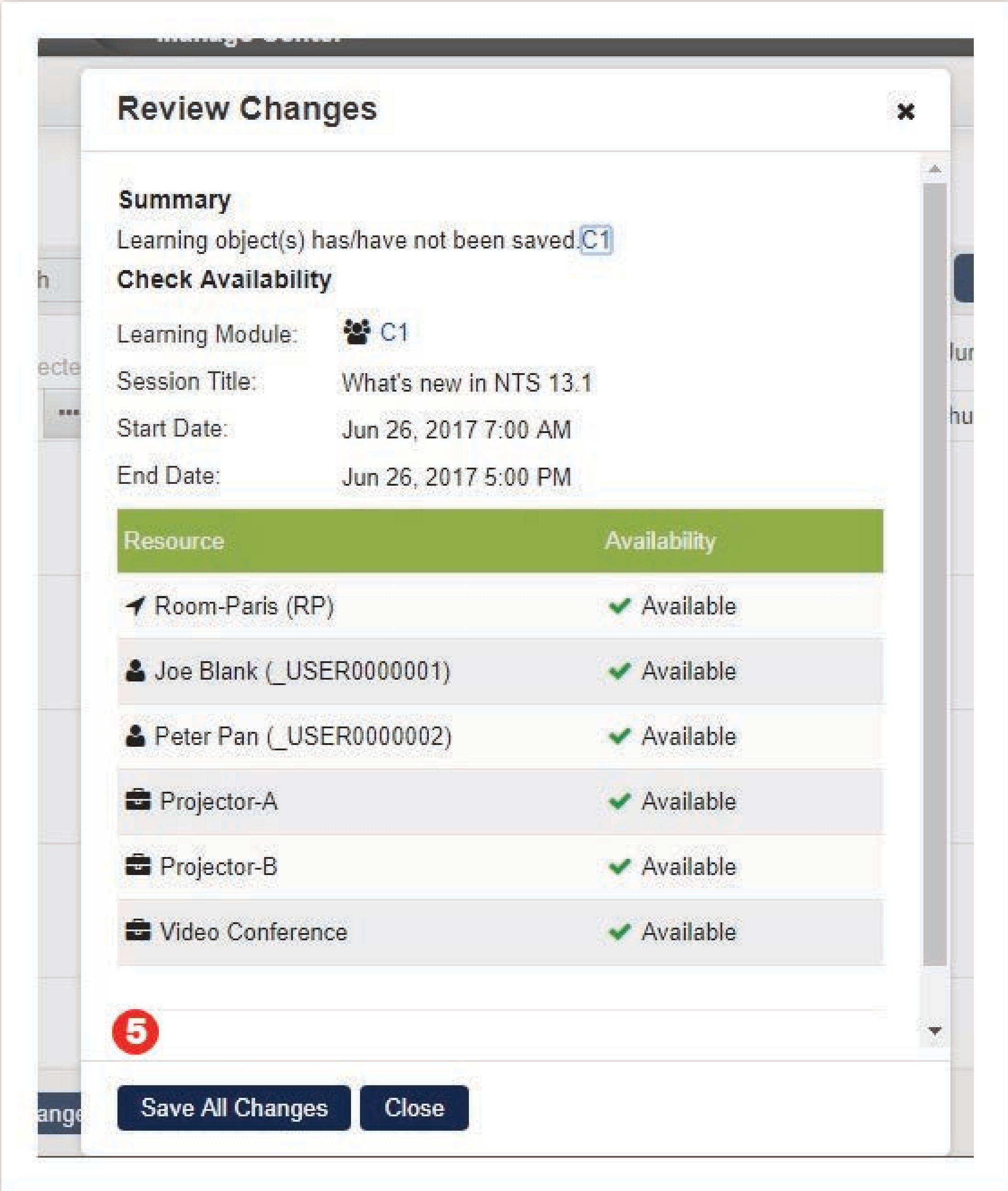
1. When editing Module Session events during the *Check Availability* step, invoke the "Draft Mode" by
    a. Making a change in the Catalog Editor without saving, OR
    b. Checking "**Mark this change as draft**" before clicking **Book**:



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



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



6. To save the drafted changes, either click **Save All Changes** in the **Review Changes** dialog, or **Save in Catalog Editor** by individual learning objects.
7. Draft changes will be discarded when the Administrator:

   - Clicks **Reset Changes** on the action bar;
   - Clicks **Reset in Catalog Editor** (by individual learning objects);
   - Logs out; or when the current login session expires.

Drag and Drop Editing of Events

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

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

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

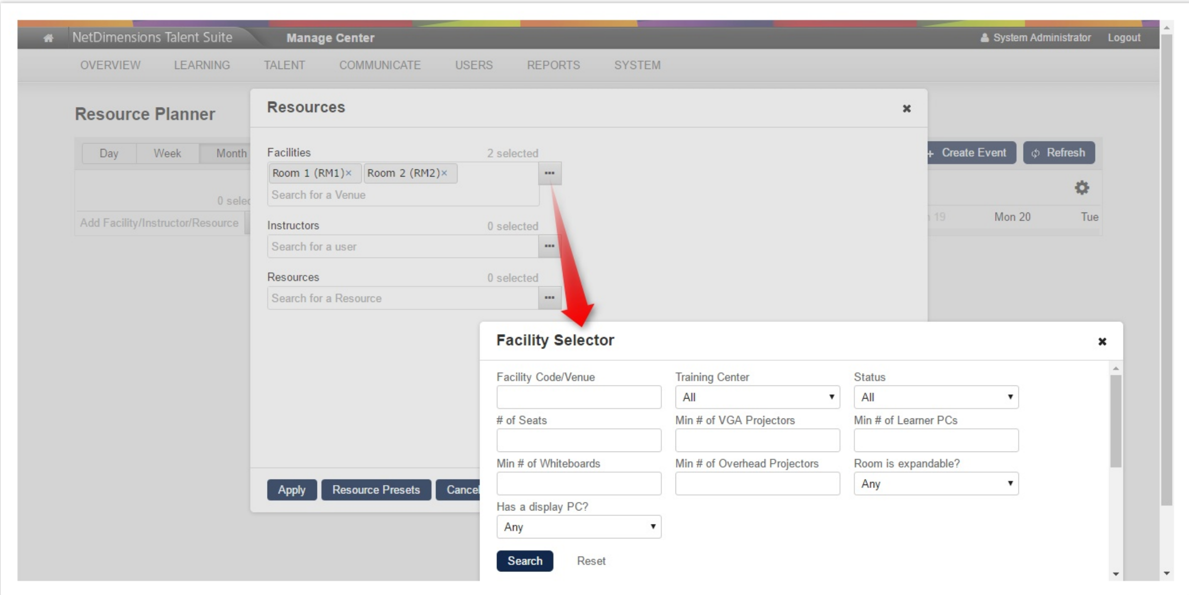
The System will then ask for confirmation. Drag and drop the event again for further change(s) if necessary.

Resource Planner

This feature allows you to get an overview of facility and resource schedules as well as instructors.

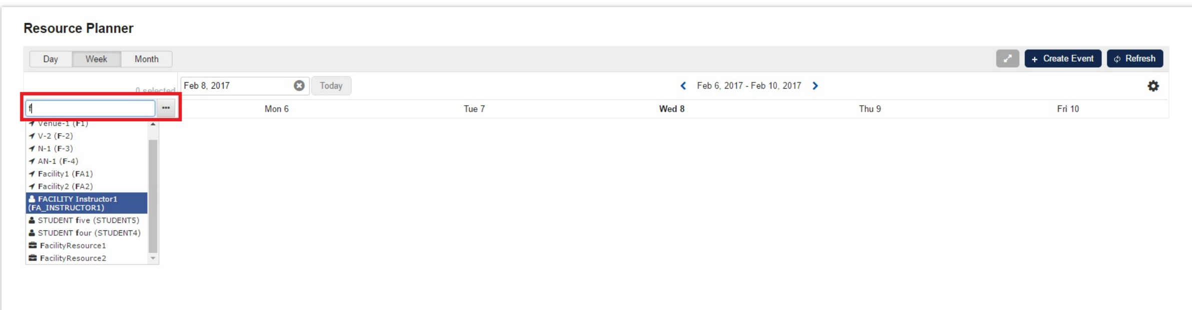
Selecting Resources at Resource Planner

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



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

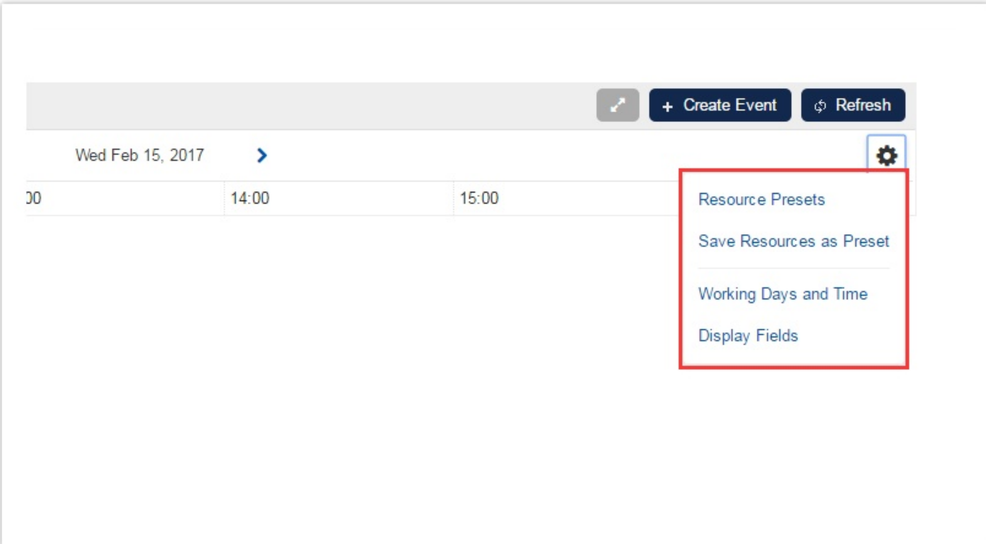
Once the schedules have been loaded in the planner, you can add to the list of resources by typing directly into the quick selector at the top left-hand corner of the Planner:



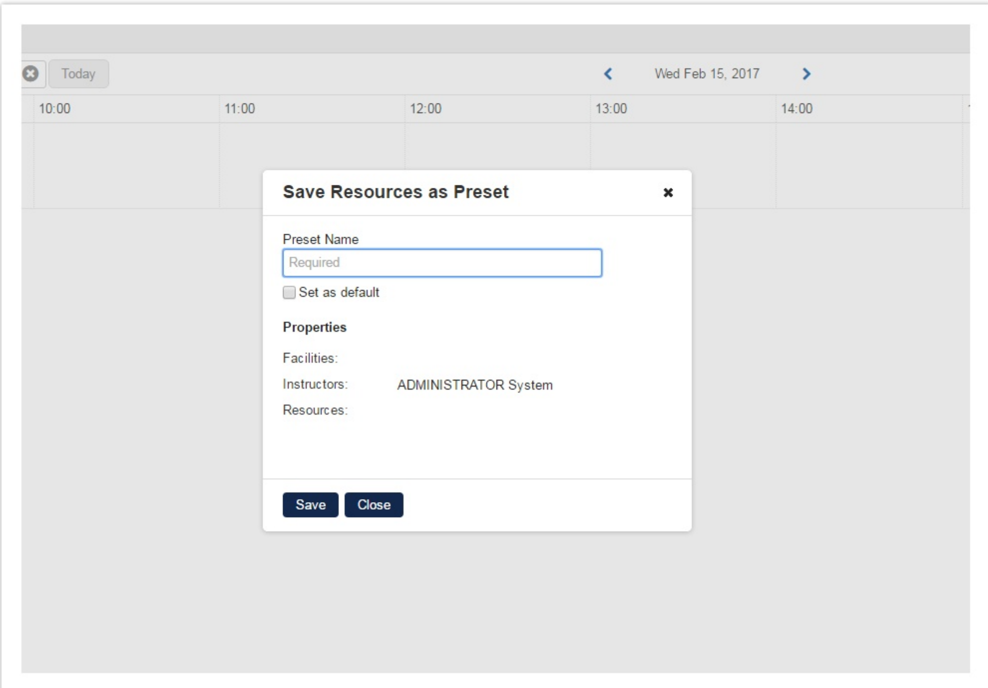
The Resource Selection dialog and Advanced Selectors are accessible via the "..." button next to the quick selector:

Resource Planner Presets

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



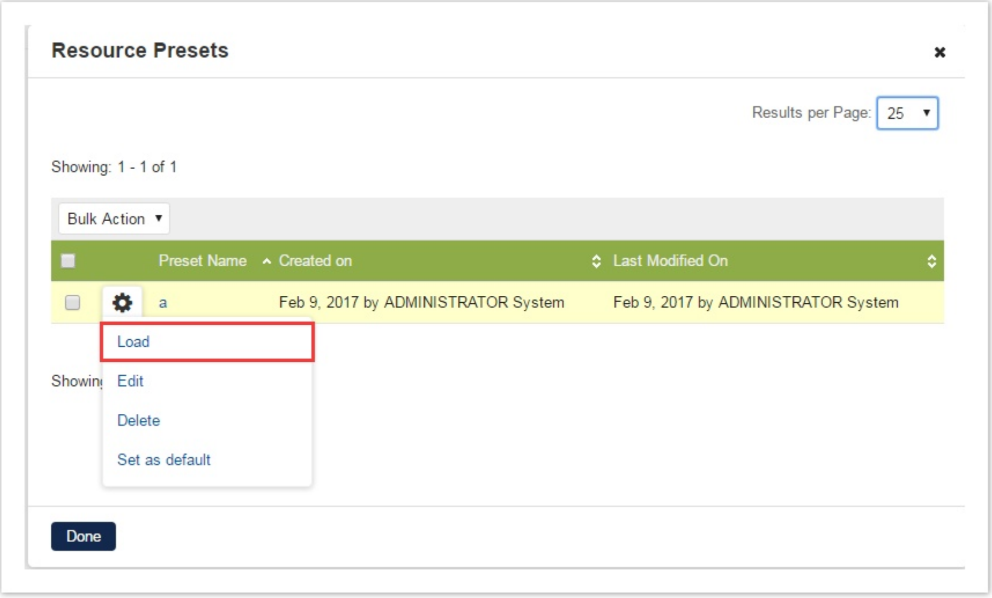
You will then be prompted for the Preset Name and if applicable, set the Preset as the default - if enabled, this Preset will load automatically on the first visit to the Planner in a given login session.



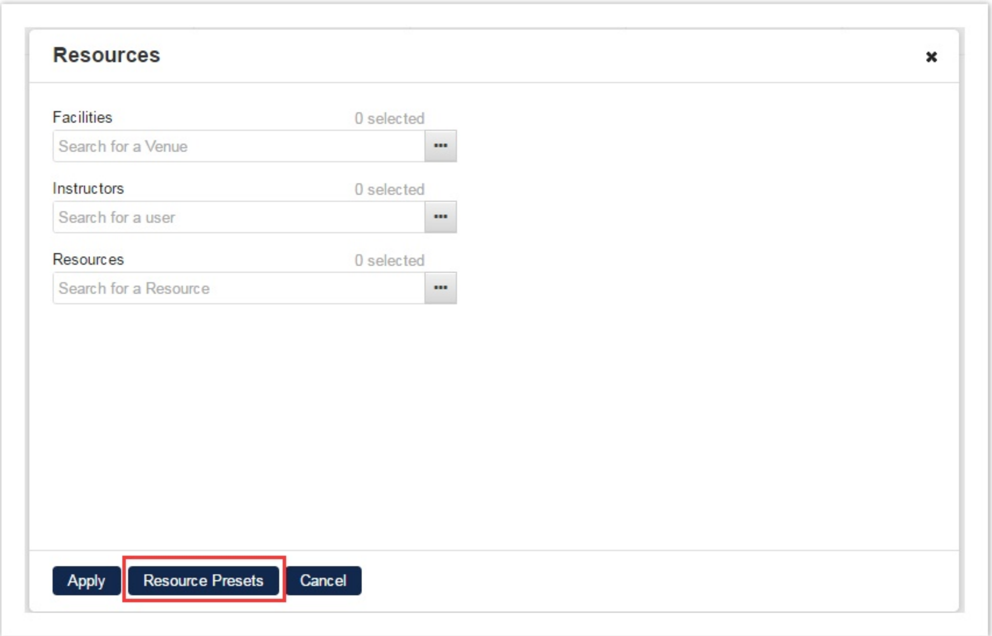
Clicking "Resource Presets" will launch a dialog listing all Presets and from here you can

1. Load the Preset Resources into the Planner

2. Edit a Preset Name
3. Delete Presets
4. Change the default Preset



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

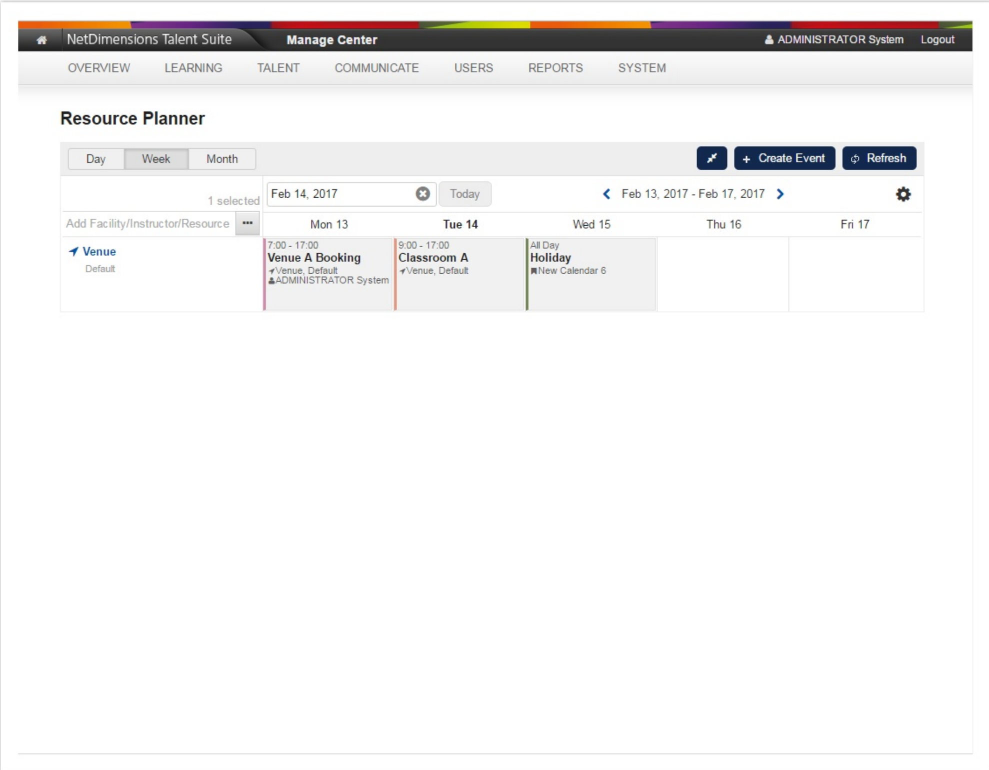


Facility, Instructor, and Resource Schedules at Resource Planner

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

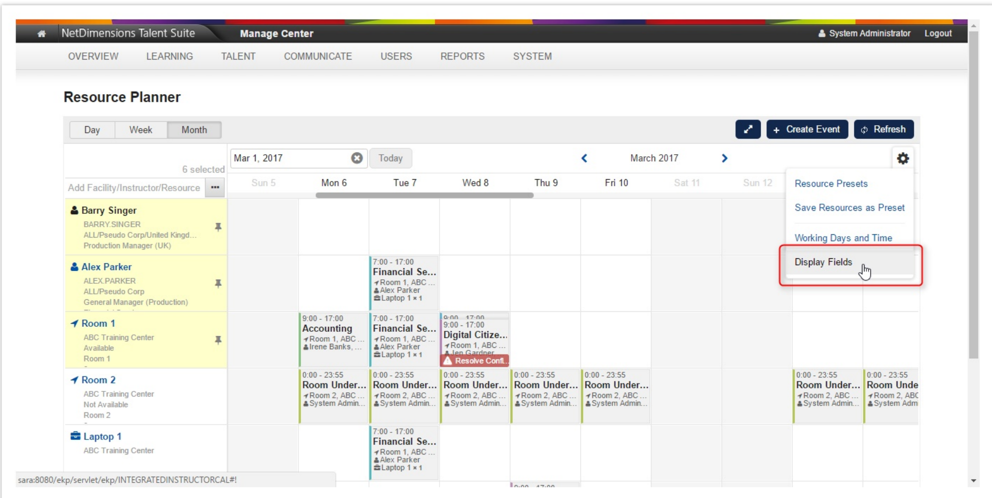
Event blocks will appear when:

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

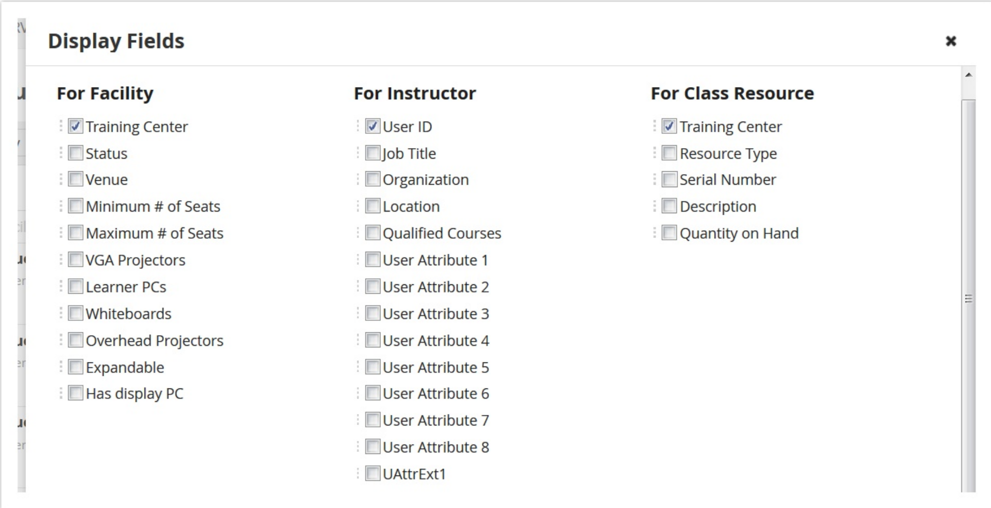


Resource Display Fields at Resource Planner

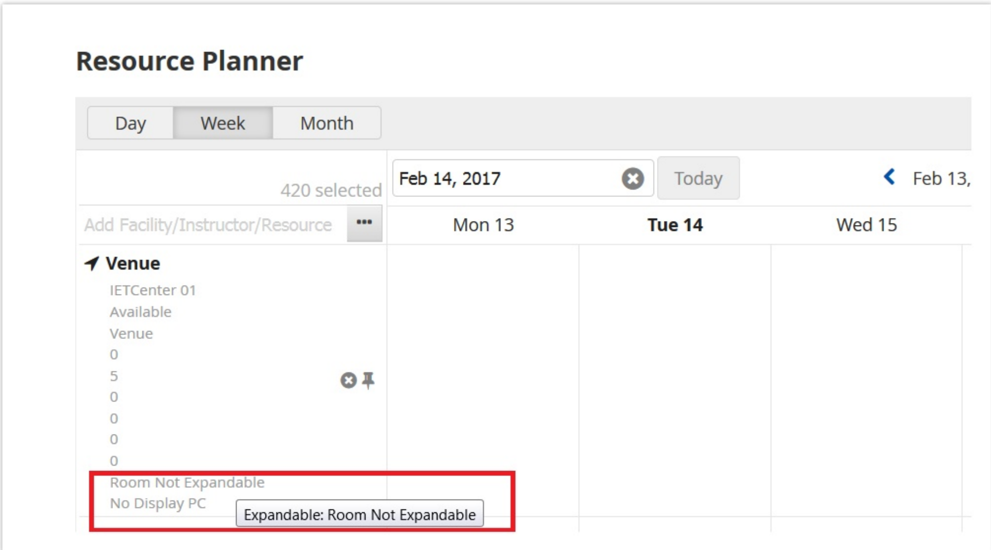
In addition to an Instructor's Name, there may be other properties that will assist in Resource Planning. The same is true for Facilities and Class Resources. These properties can be configured for display via "Display Fields":



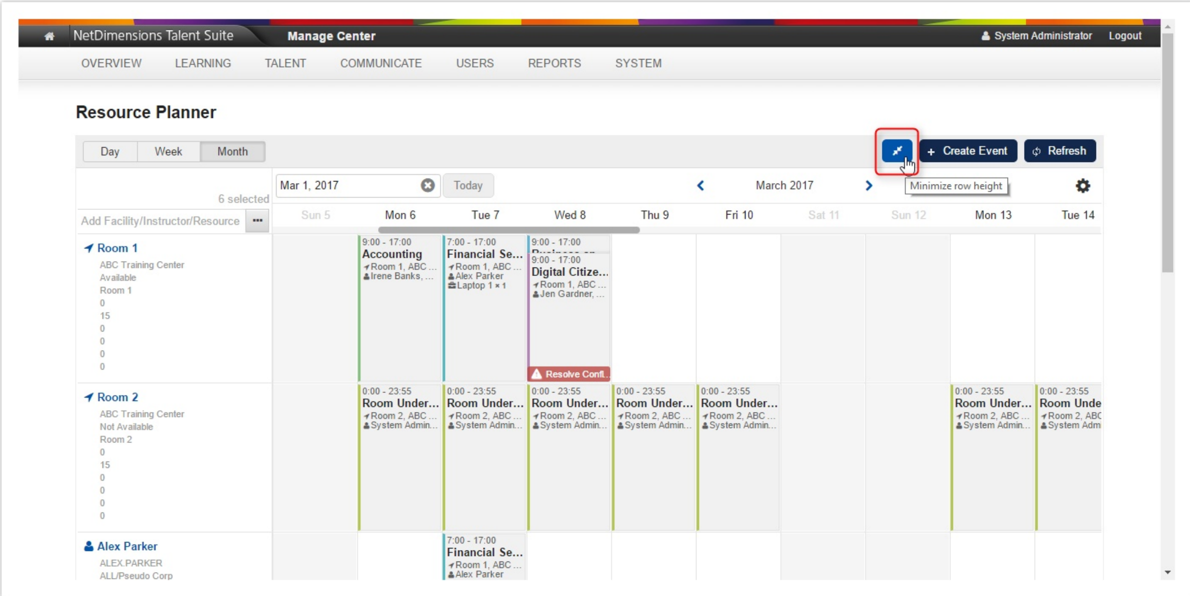
Here you can toggle the display of a wide selection of properties and also specify the display order by dragging and dropping the field:



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



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

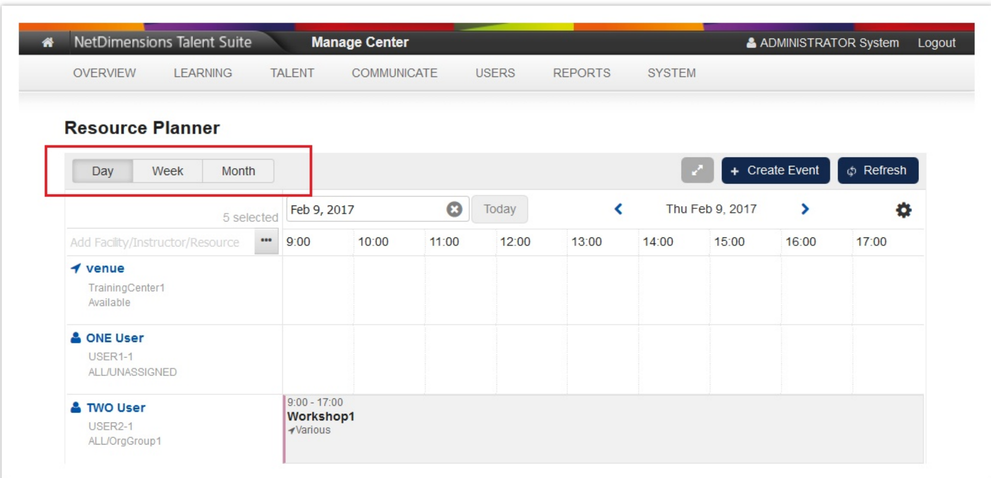


Configured Display Fields (and Working Days and Time) will be stored even after logging out.

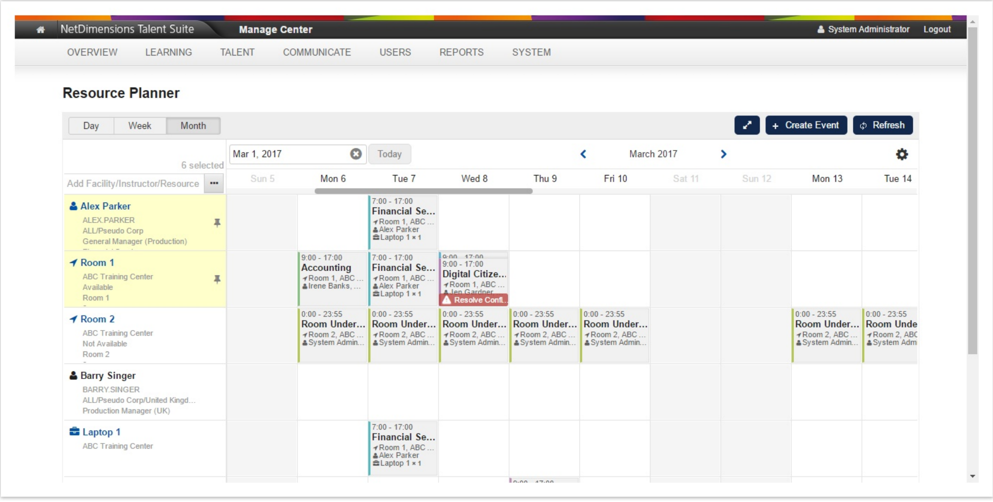
If more information is required for a resource, depending on permissions, clicking a resource (Facilities / Instructors / Resources) name will open the full Class Resource Manager "Edit" page of the respective resource a new tab.

Day, Week, and Month Views at Resource Planner

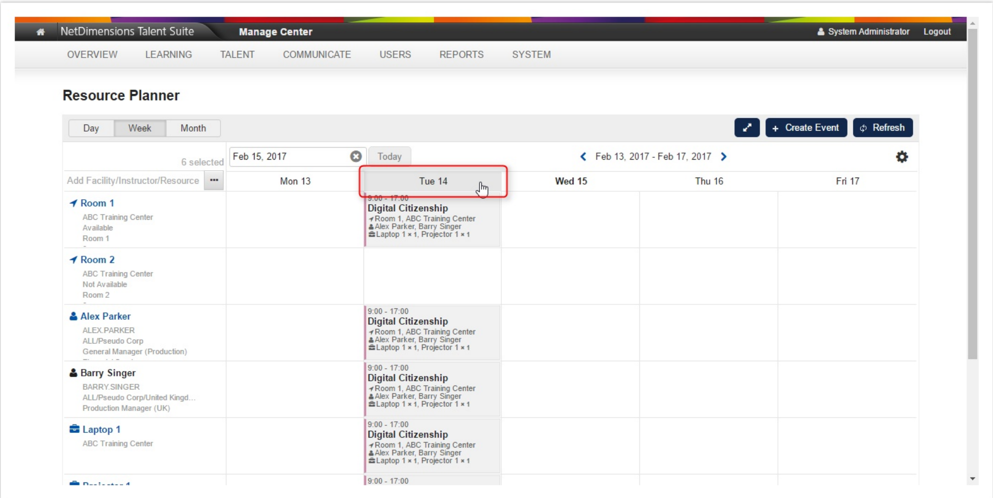
Depending on the task at hand, it may be better to view the hours of a particular day along the x-axis rather than the days of the week or month. This feature allows users to switch between Day/Week/Month views by the view setting shown at the top left-hand corner of the Resource Planner page:



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

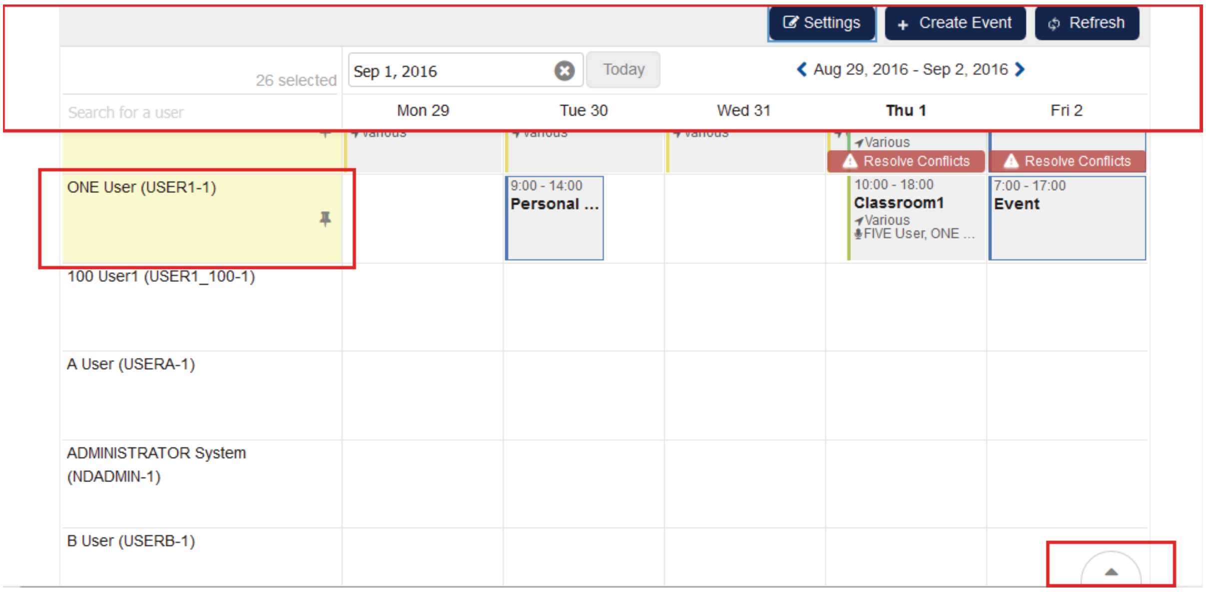


Users can jump directly into the day view for a specific date by clicking on the date header in Week or Month view:



Back to Top Viewing

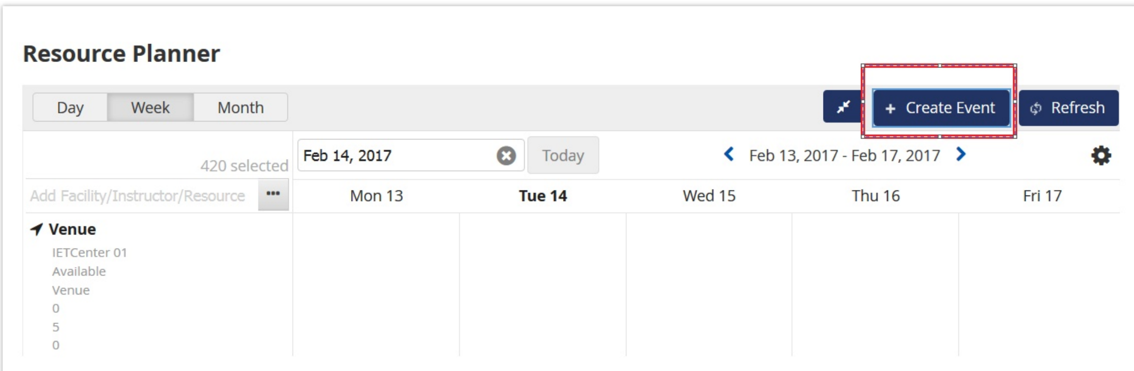
The date and action area stays on the top of the calendar as the Users scroll vertically. This is to prevent losing sight of the day and date when scrolling down a long instructor list. To get back to the top/pinned instructors, click the "Back to Top" function at the bottom right-hand corner of the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



Creating Events

There are three ways to start the Create Event flow:

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



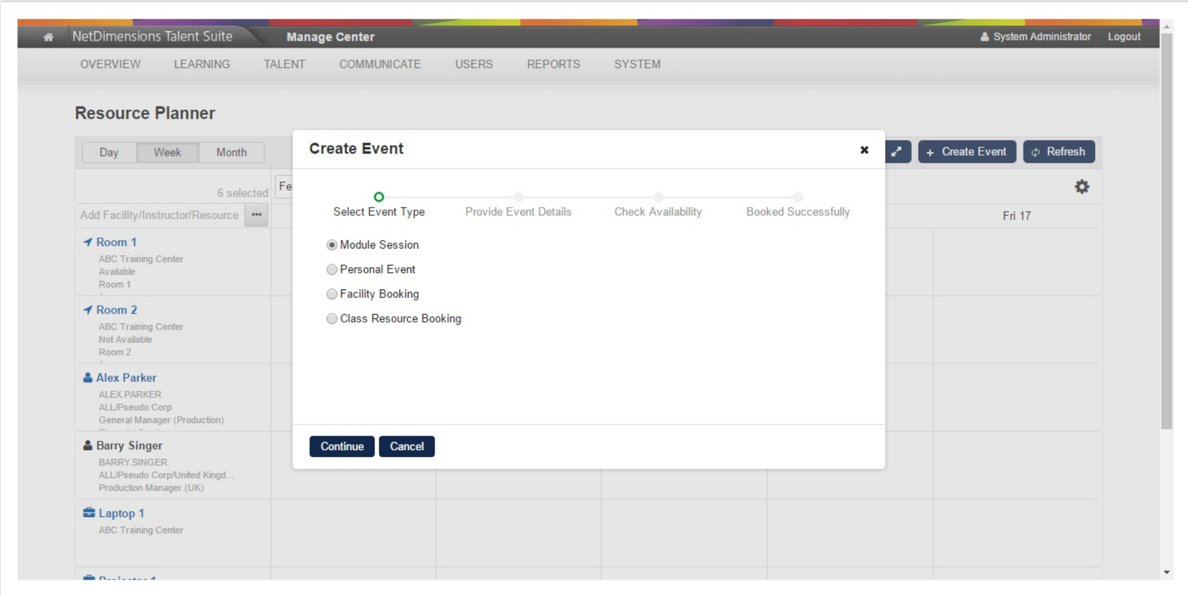
2. To create an event for an individual resource in the planner, navigate to the event date and click on the cell corresponding to the desired resource and start date/time.
3. To create an event for several resources in the planner, perform **Pin to top** for the desired resources, and click on the cell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

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

Step 1: Select Event Type

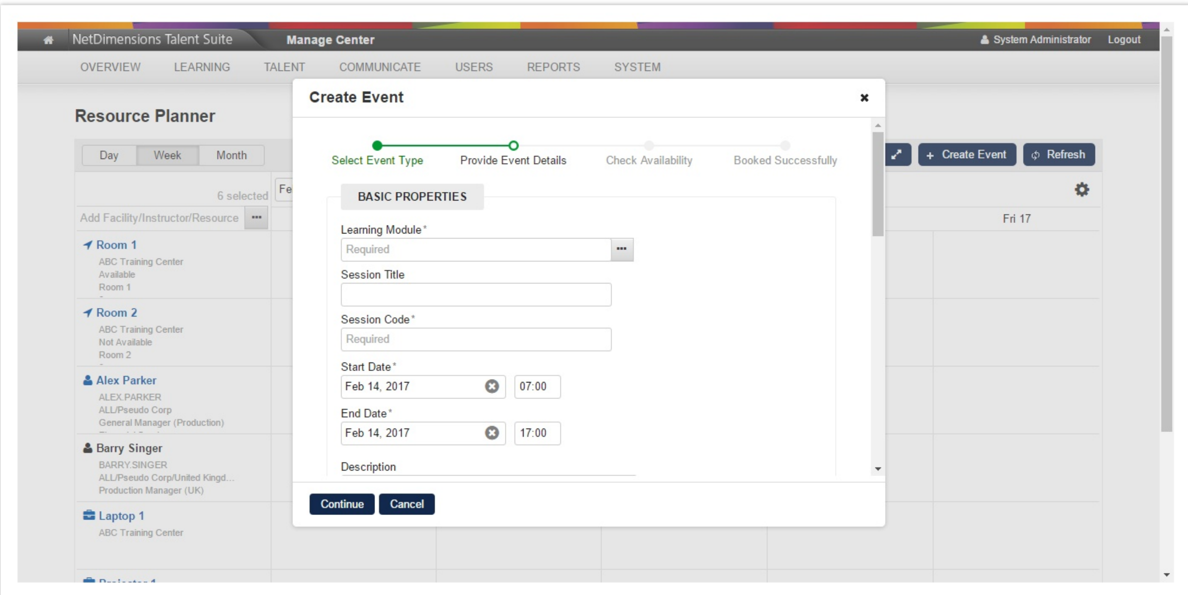
You can select from the following event types:

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



Step 2: Provide Event Details

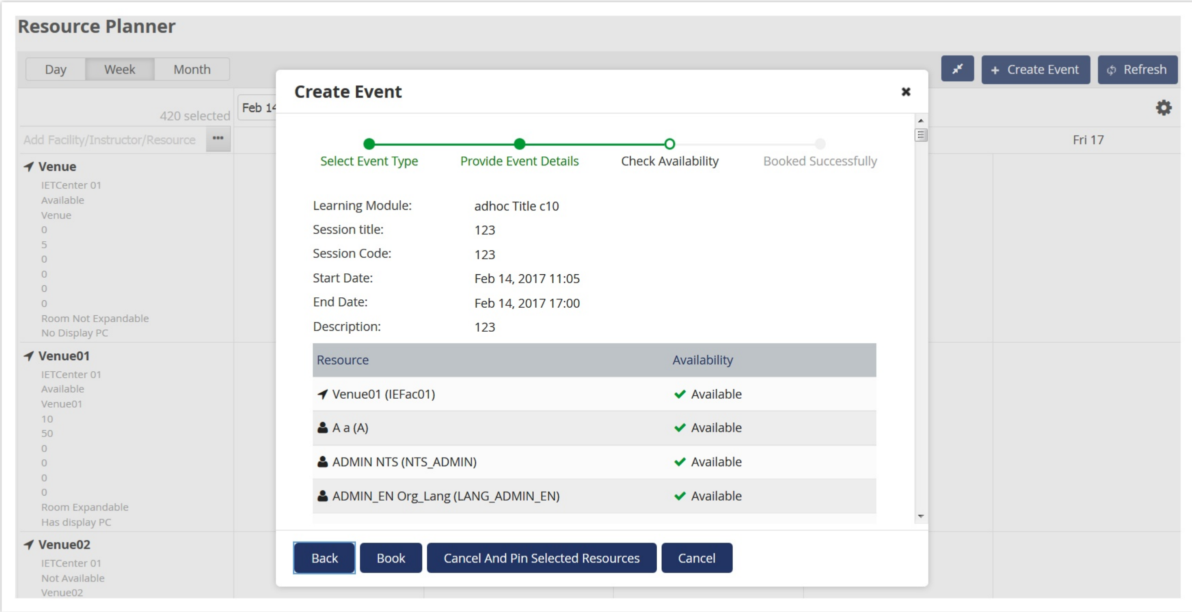
A different Event Details form will be presented depending on the event type selected in the previous step. Date/Time and Selected Resources may already be pre-populated depending on how you started the Create Event flow and the selected event type.



Step 3: Check Availability

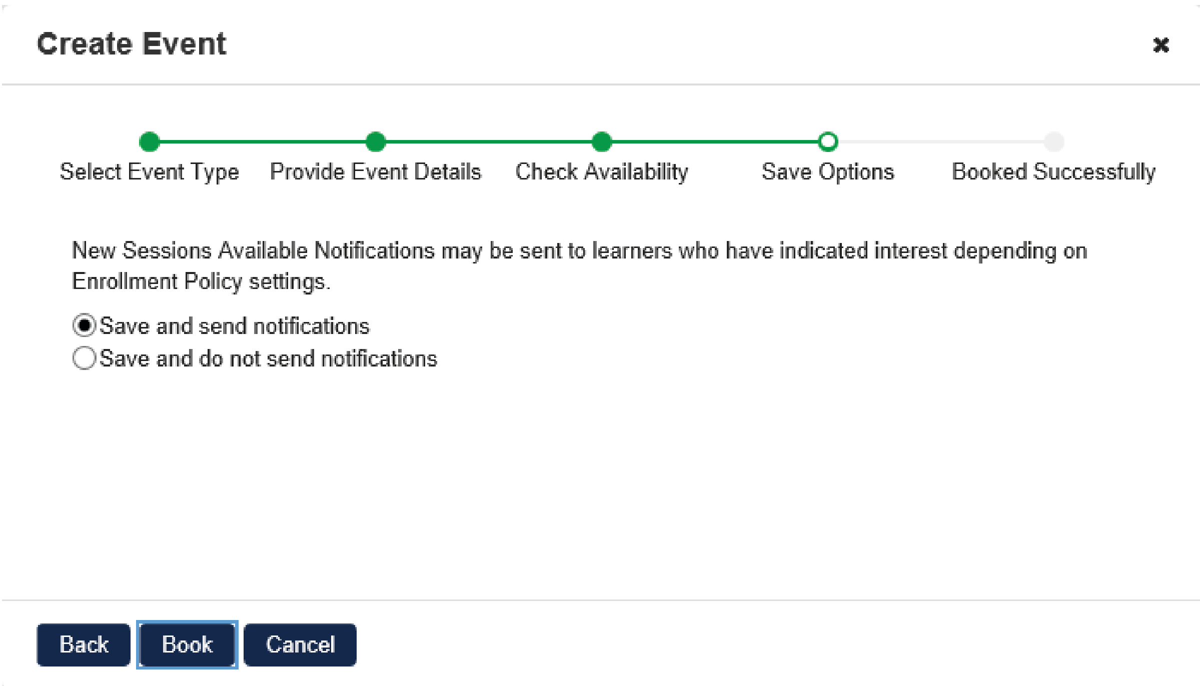
The results of the availability check will be displayed and the administrator will have the option to

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



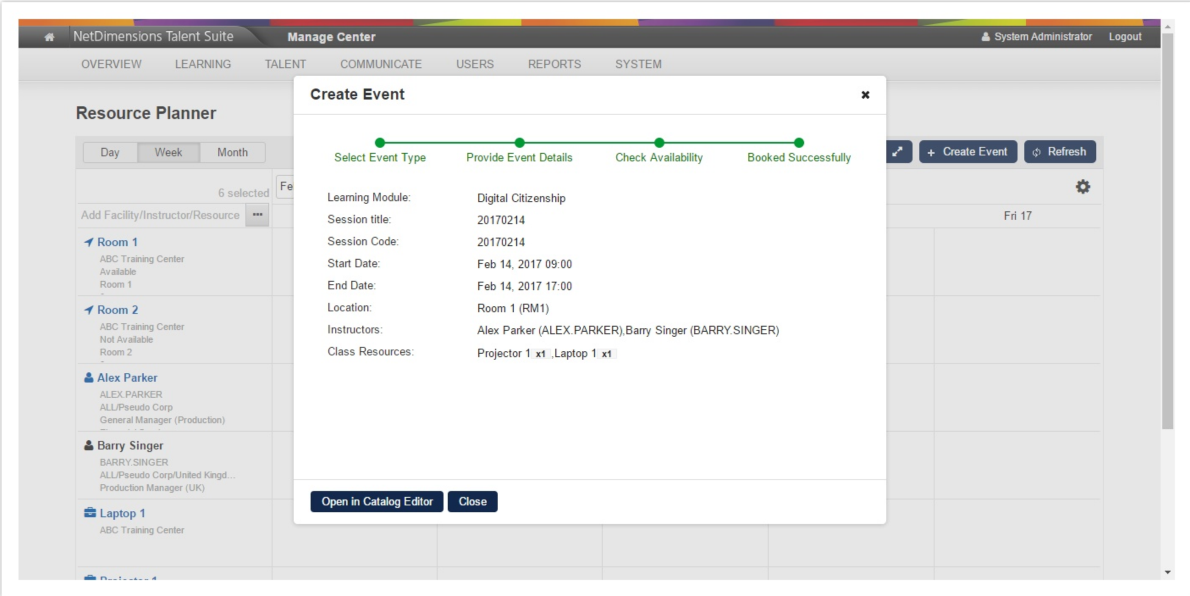
Step 4: Save Options

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



Step 5: Booked Successfully

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

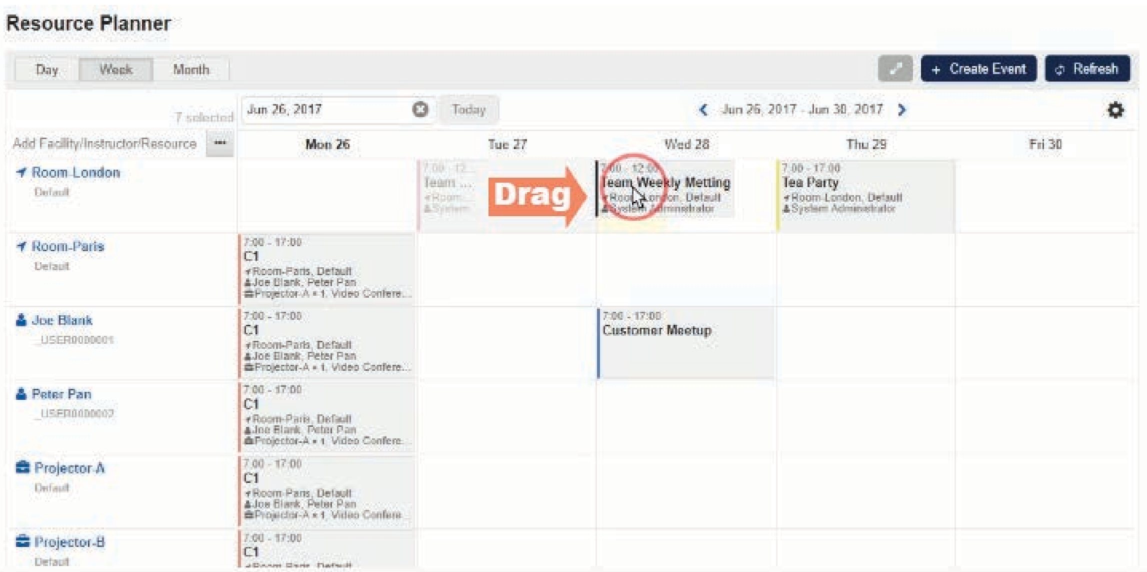


Drag and Drop Editing

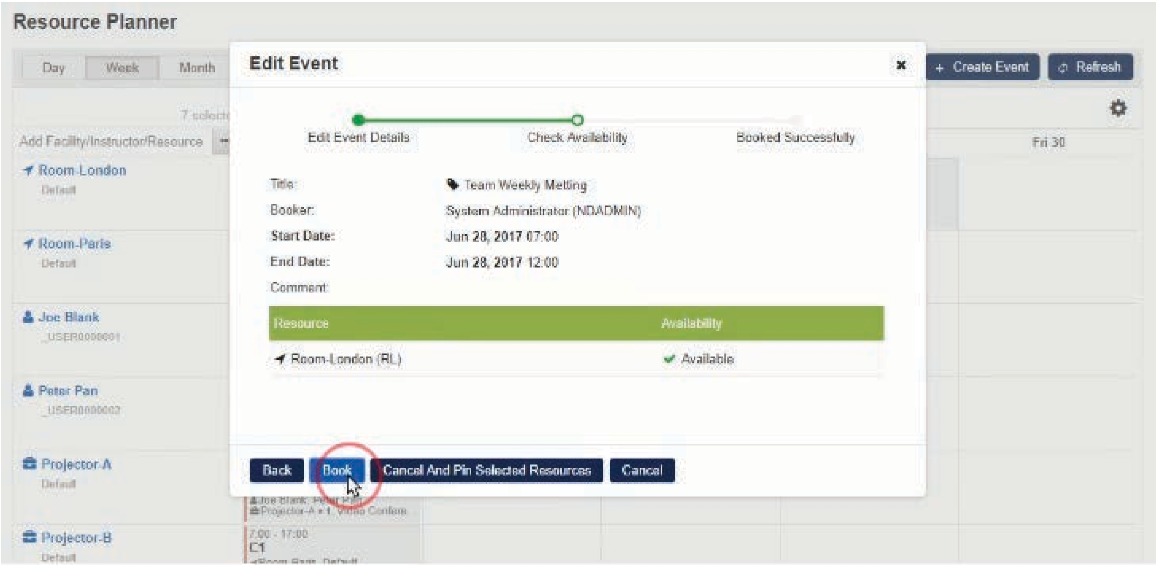
Administrators can drag-and-drop editable event chips to update the schedule directly. (However, Holidays, enrollments, resource reservation, and read-only events **cannot** be edited in this way.)

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

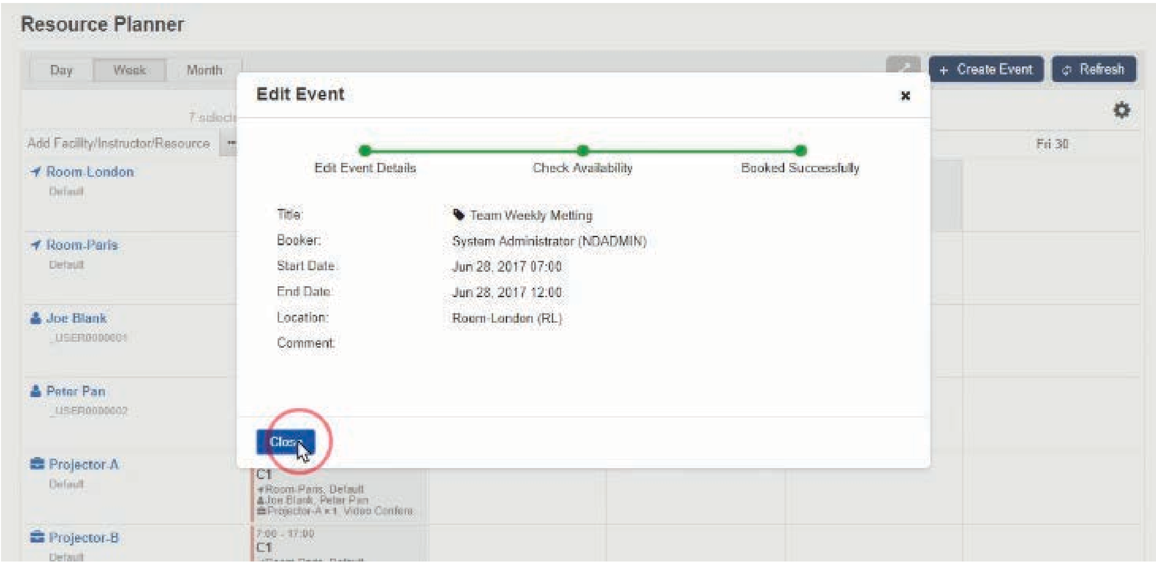
1. Drag the whole chip to the same time slot of another day.



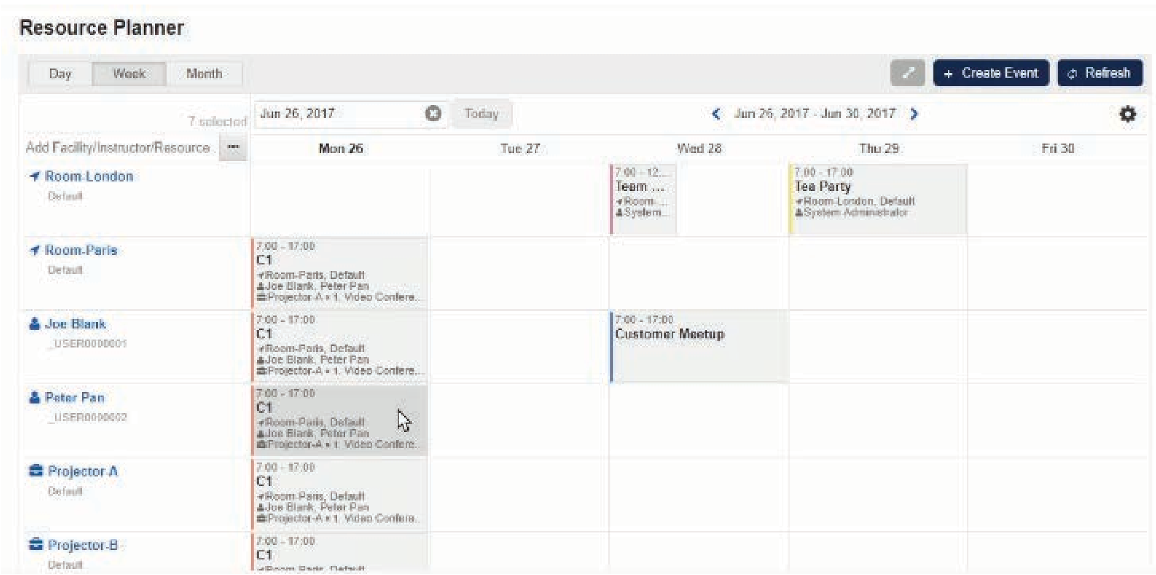
2. The System will ask for confirmation - Press **Book!** to accept the new time.



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

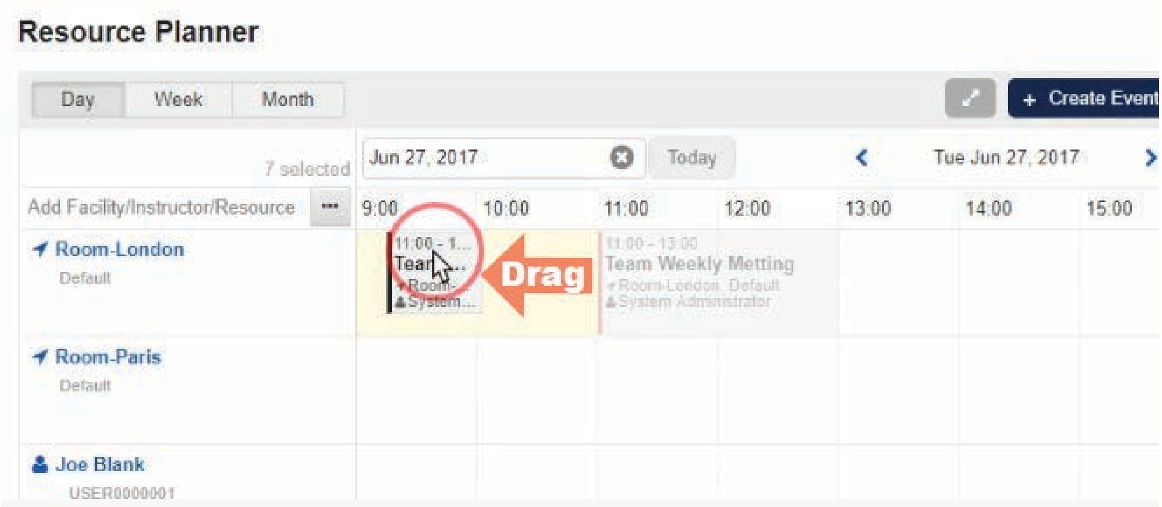


4. The Event has been moved to the new time slot.

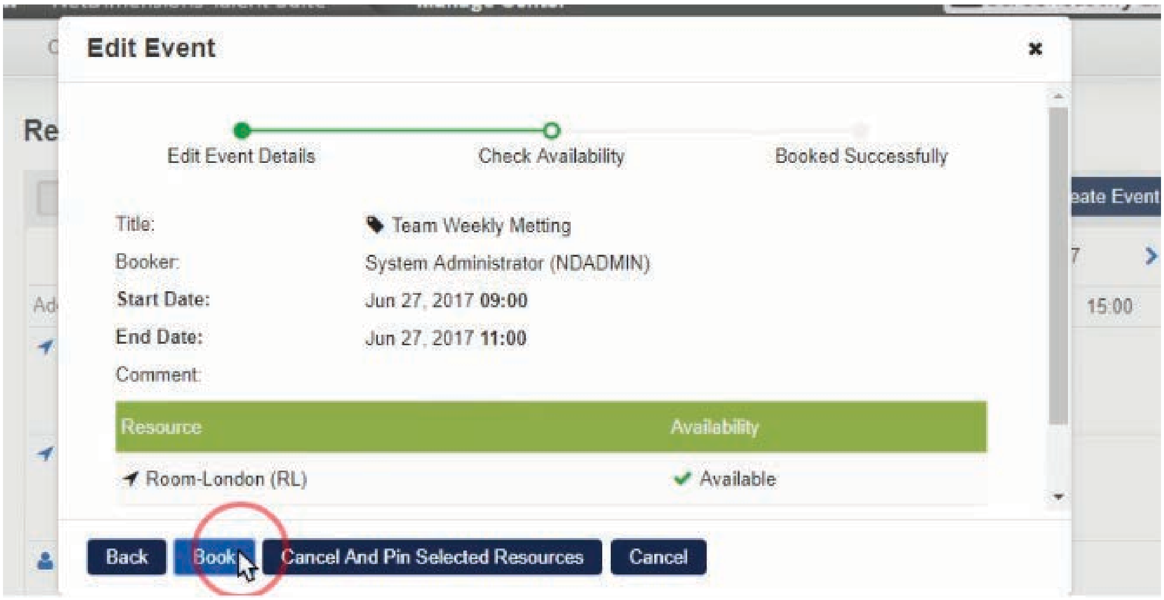


- In the Day view, event chips can be dragged to update the start and / or end time(s) of an event, and *they can be resized to update the duration of an event.

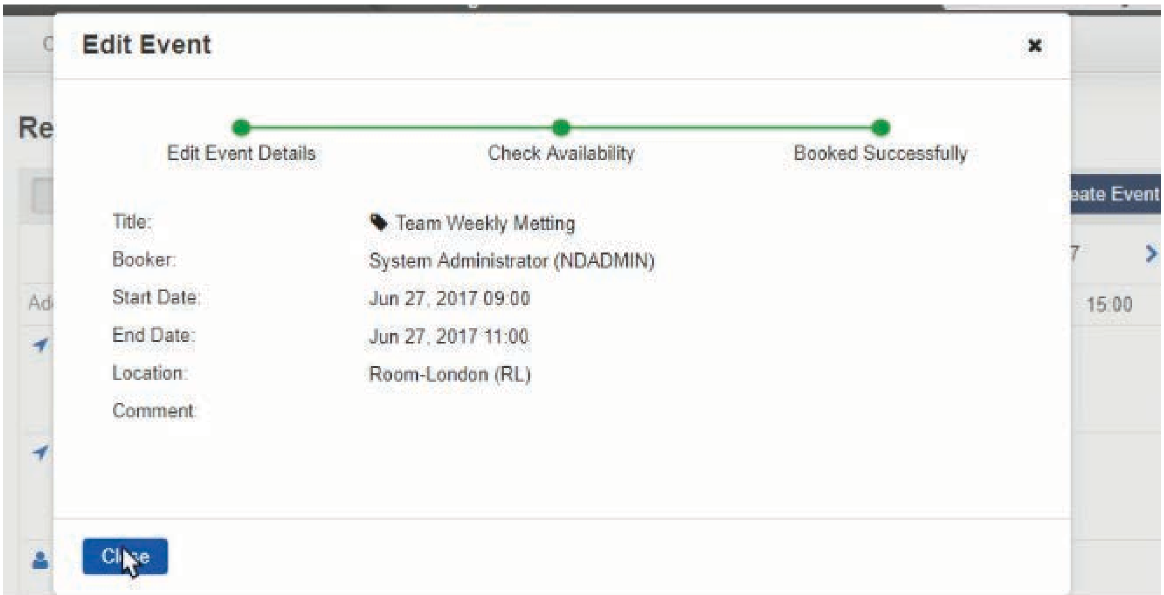
1. Drag the start timeline to the new position.



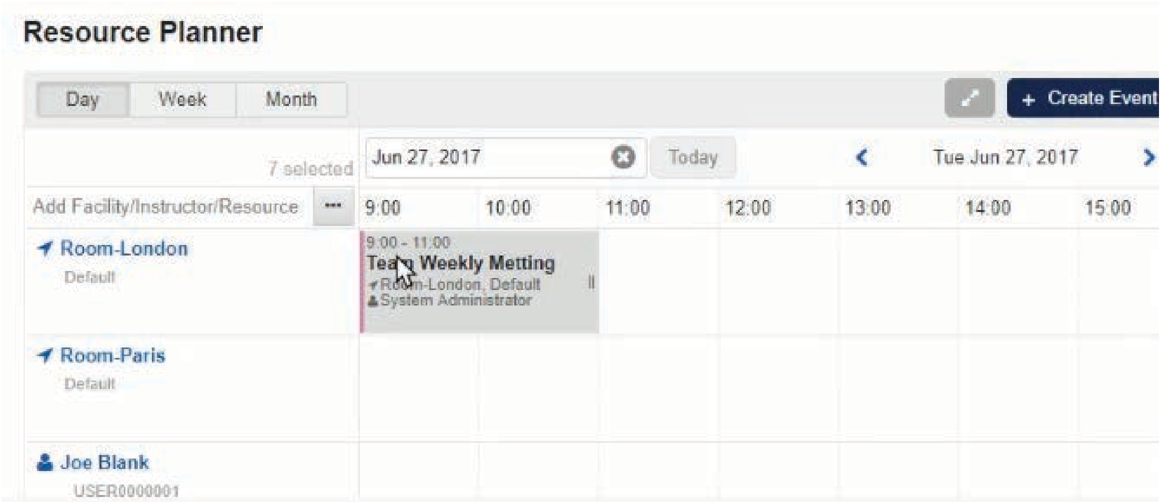
2. The System will ask for confirmation - Press **Book!** to accept the new start time. The end time will be updated accordingly too.



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



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

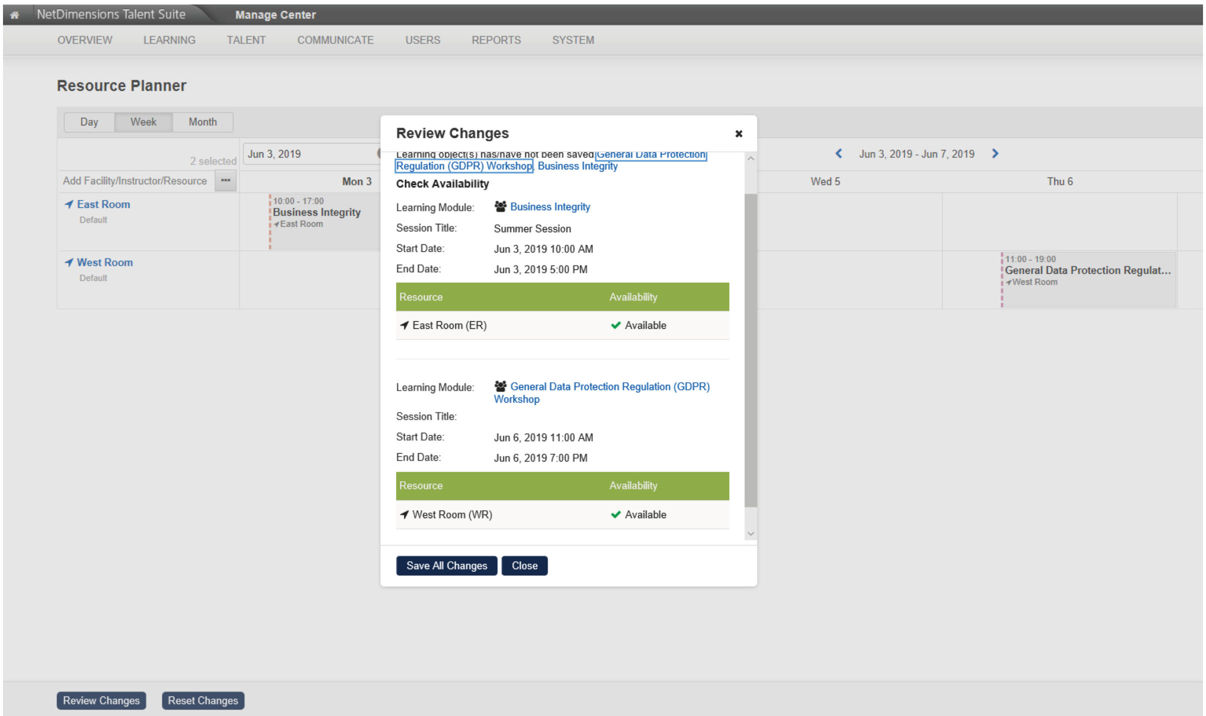


***Note:**

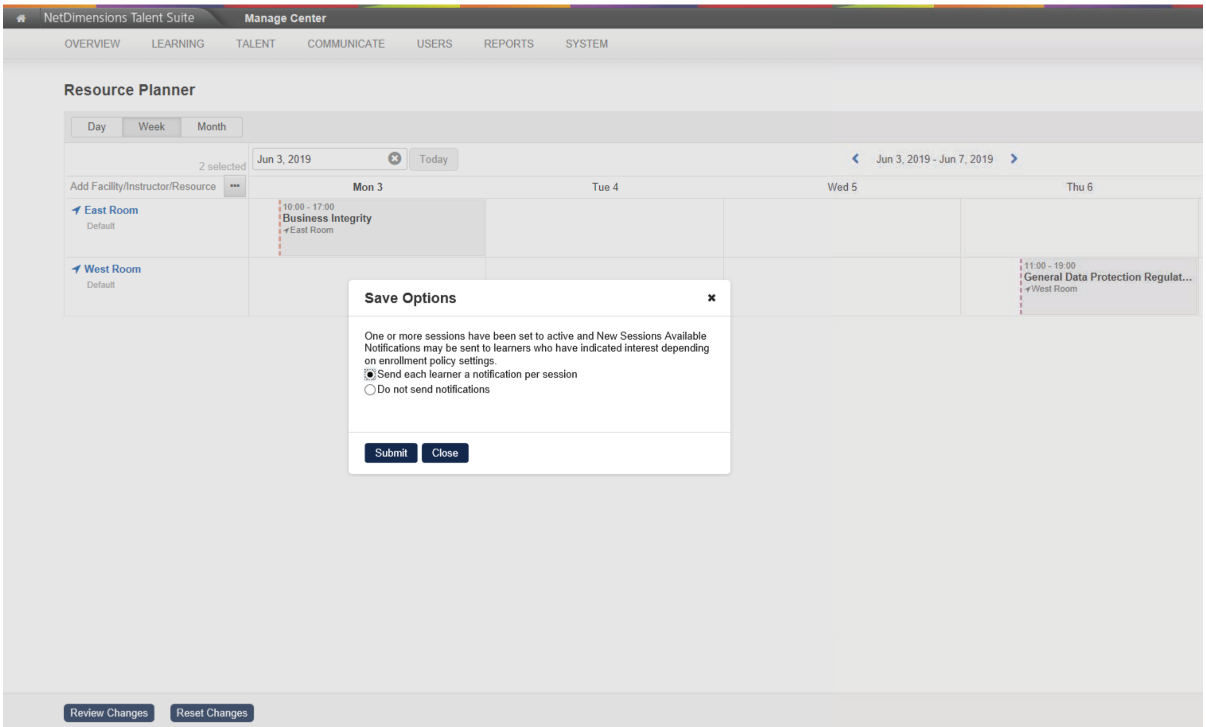
The end time can also be changed by drag-and-drop in the same way. The duration of the event can be resized by dragging and dropping the end-time without altering the start time.

Marking Changes as Draft

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

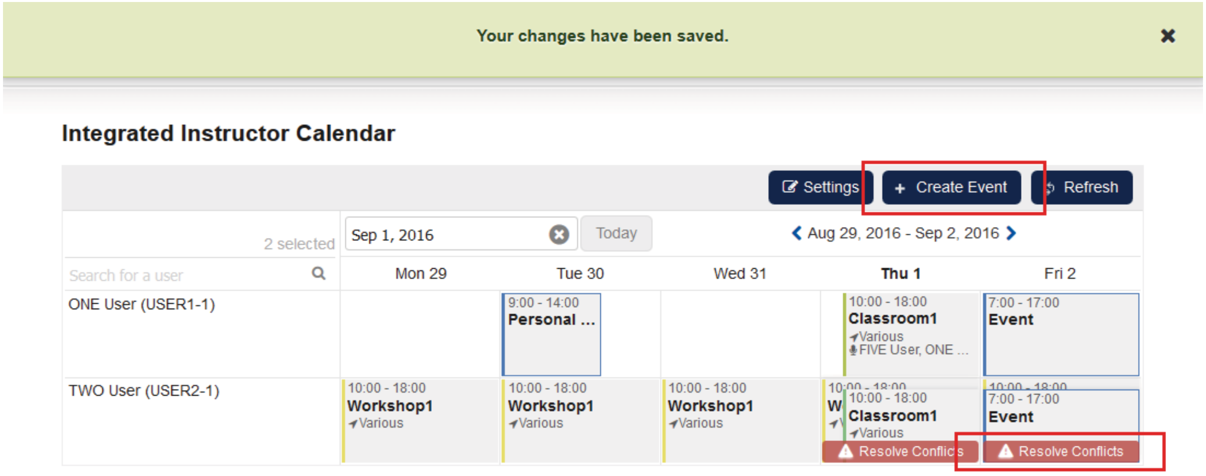


After clicking "Save All Changes", a "Save Options" dialog will be displayed if there are eligible sessions with future start dates and learners having interest in the course. You can choose whether to send New Sessions Available Notifications:

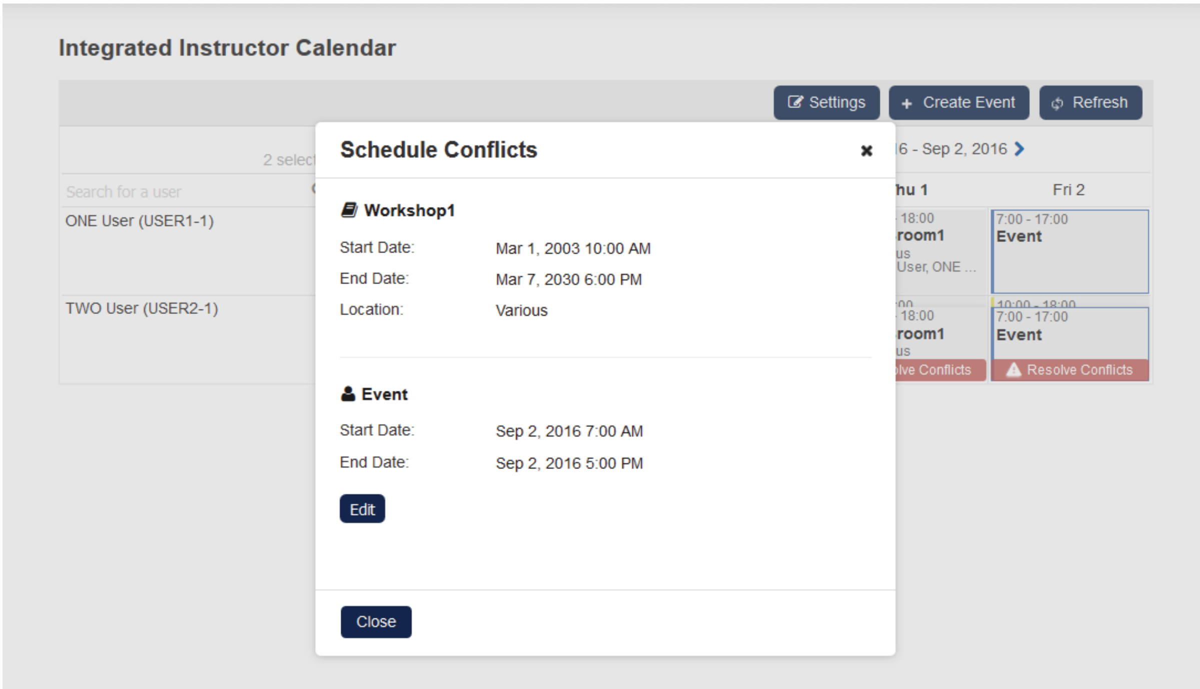


Conflict Resolution

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



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

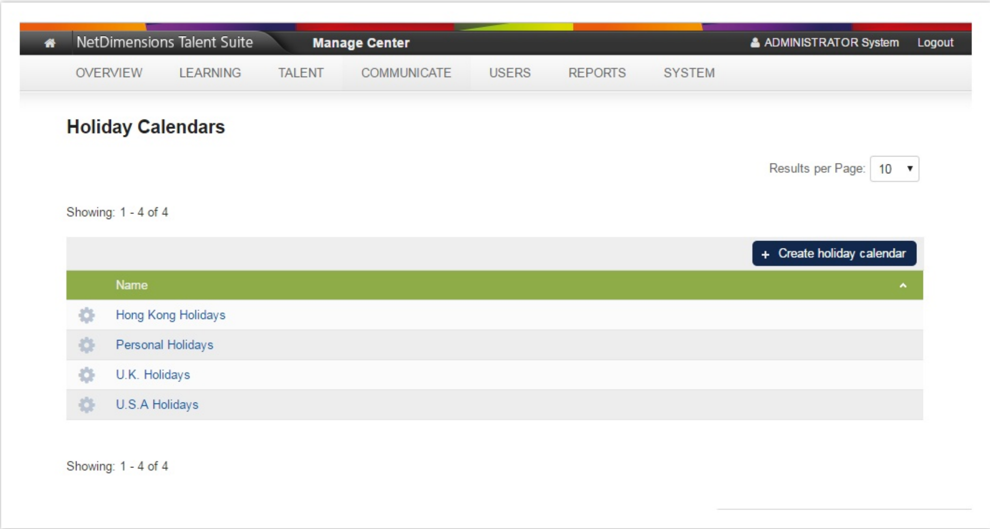


Holiday Calendars

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

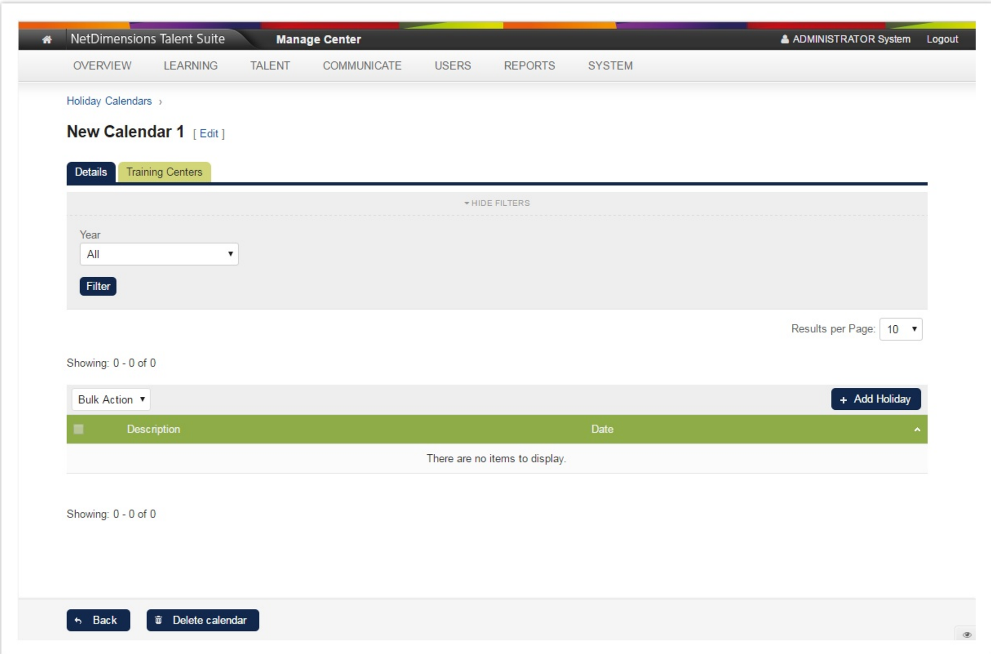
Holiday Calendars Listing

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



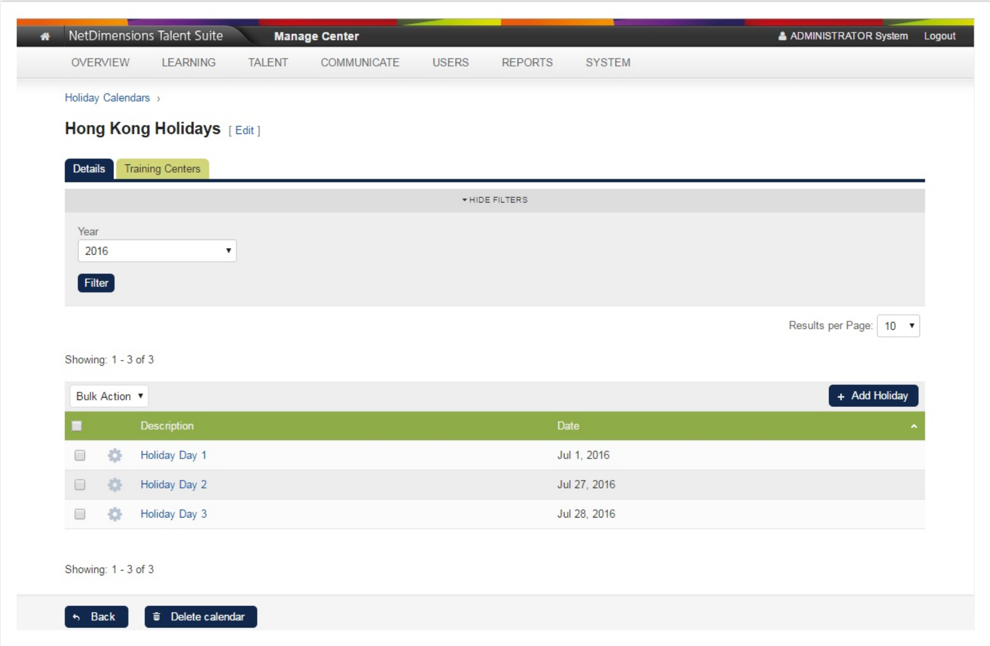
Creating a New Holiday Calendar

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

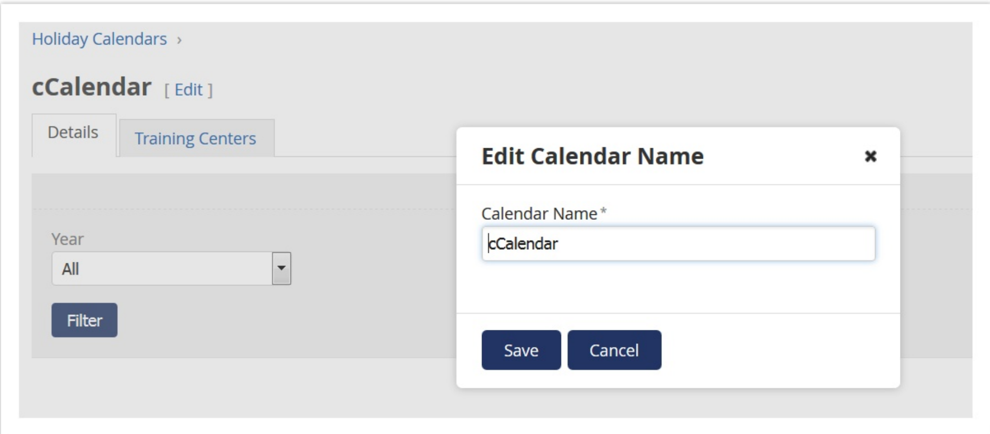


Editing Calendars

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



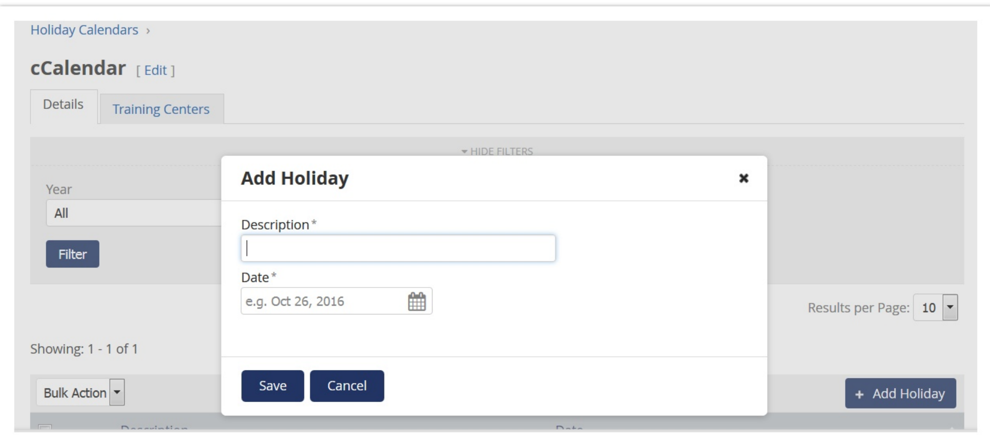
By clicking on the "Edit" next to the Calendar Heading, users can edit the Calendar name:



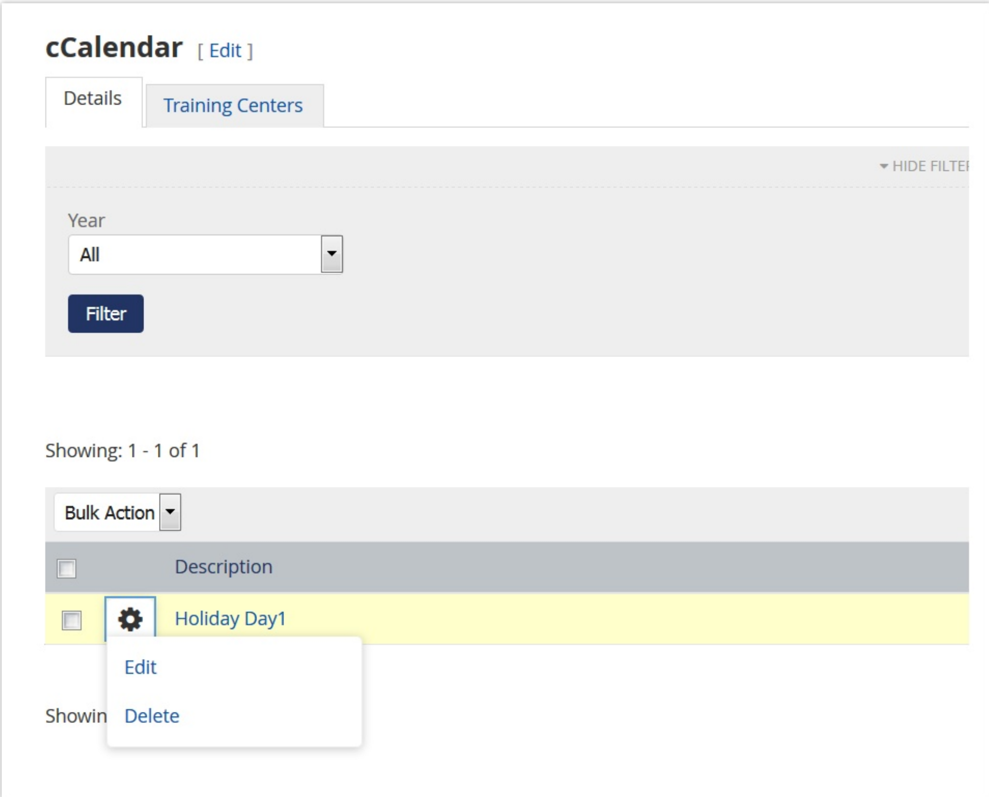
Clicking the "Delete" button; a dialog will be prompted to confirm the deletion.

Adding Holidays

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

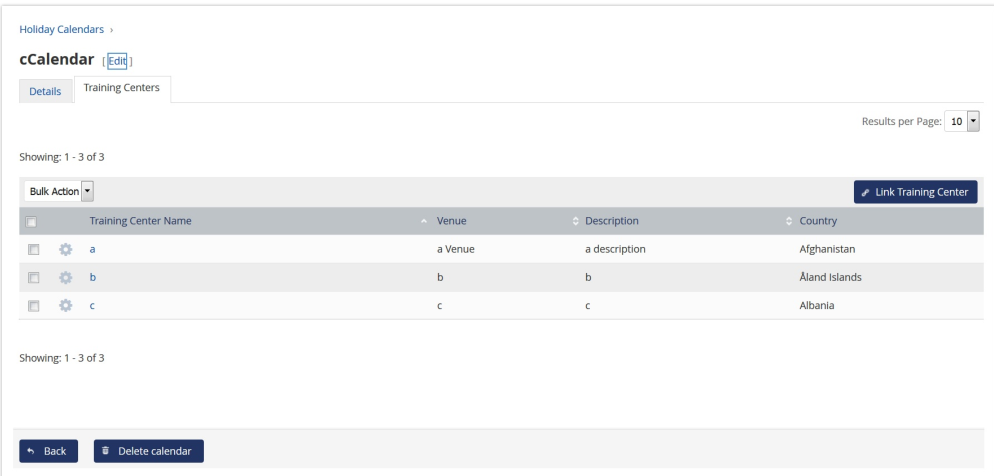


Each Holiday can be edited or deleted:

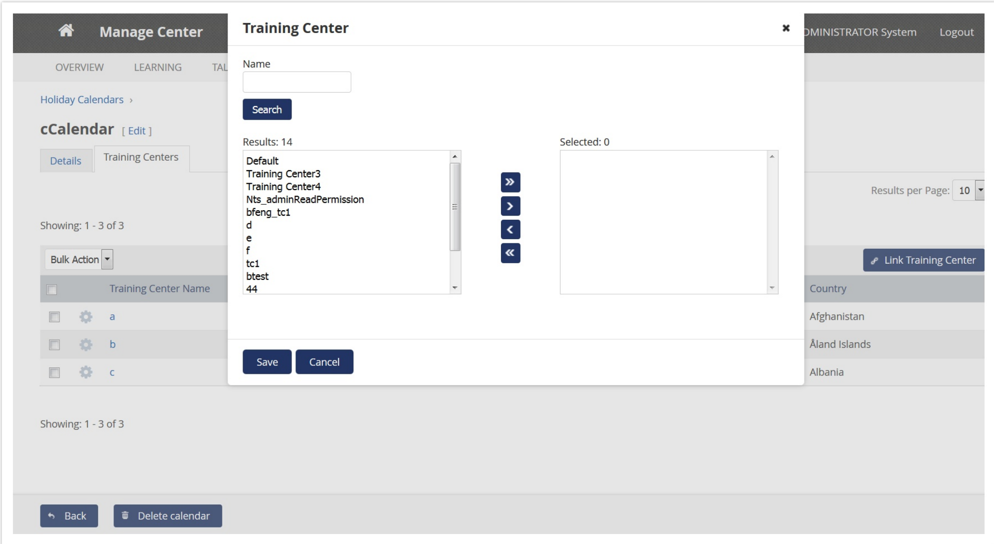


Linking Training Centers

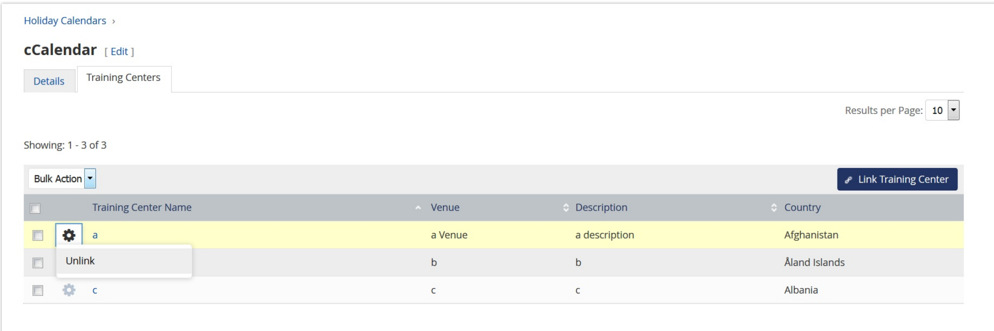
The training centers to which the Calendar has been linked are listed under the Training Centers tab:



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



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

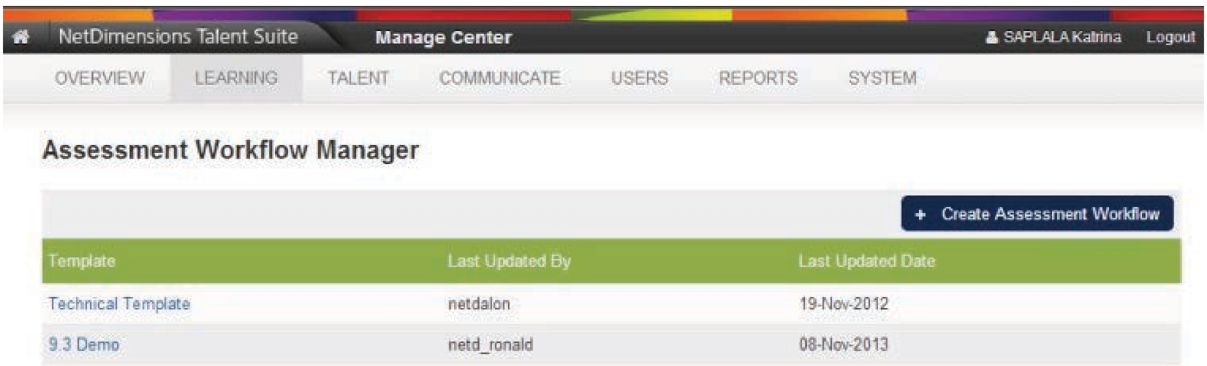


Assessment Workflow

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

Assessment workflow templates consist of a list of pre/post evaluations/exams, for courses.

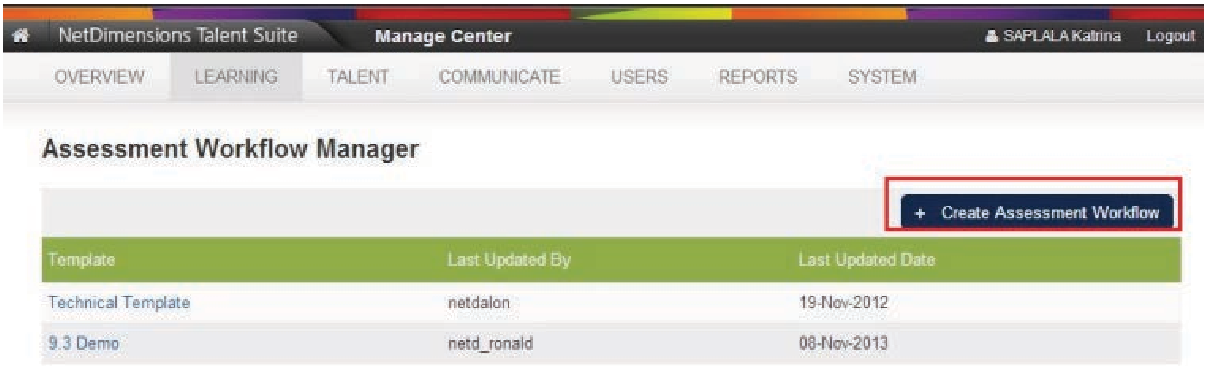
To create and manage the assessment workflow template proceed to **Manage Center > Learning > Catalog General Settings > Assessment Worflow Manager**. This opens the *Assessment Workflow Manager*



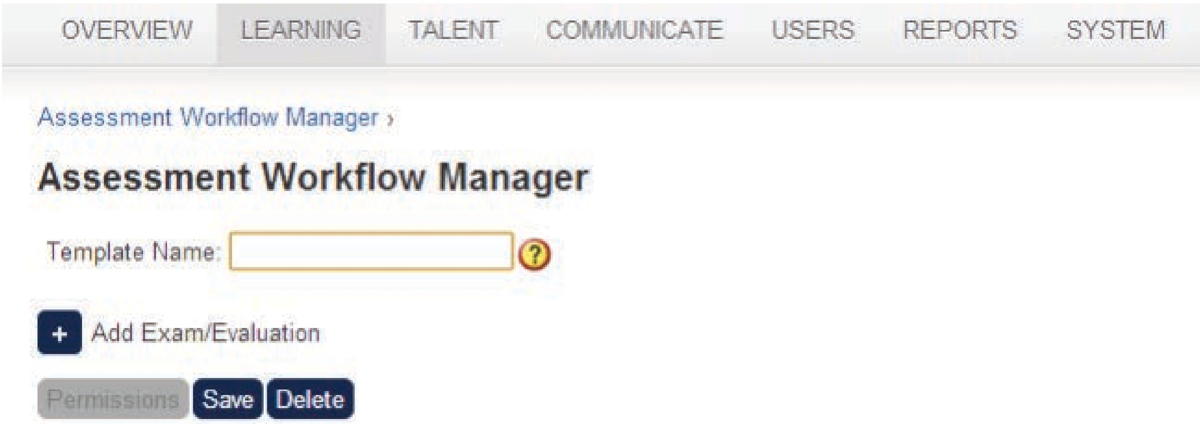
Creating a New Assessment Workflow

To create an assessment workflow:

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



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

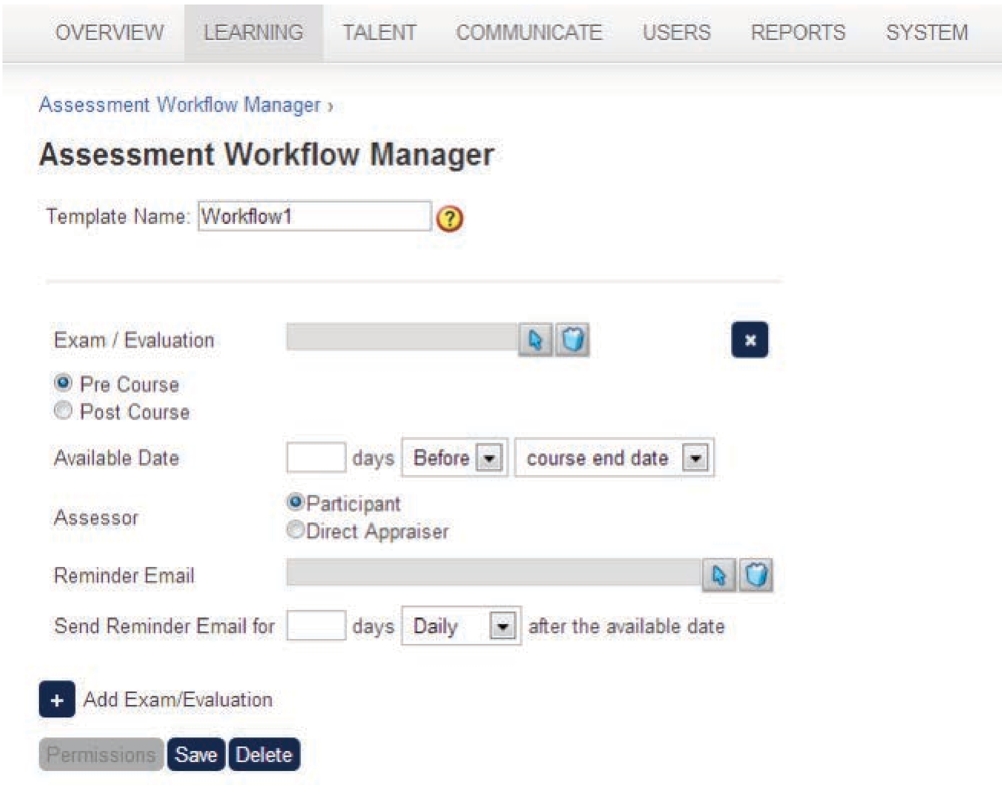


3.Click the **Save** button to save the new template. Once saved, the **Permission** button will be enabled.

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

The assessment workflow details appears:

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



Enter the following parameters

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

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

Template Setting

There will be 3 main places for configuring workflow template:

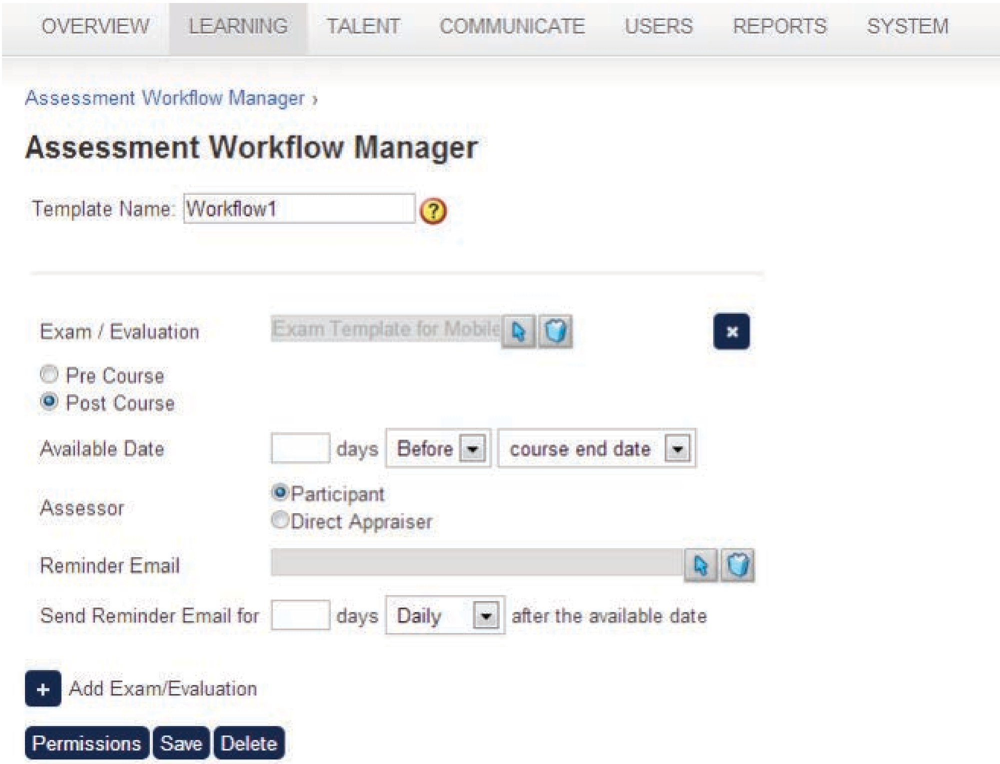
1. System-wide default template
2. Organization default template
3. Session defined template

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

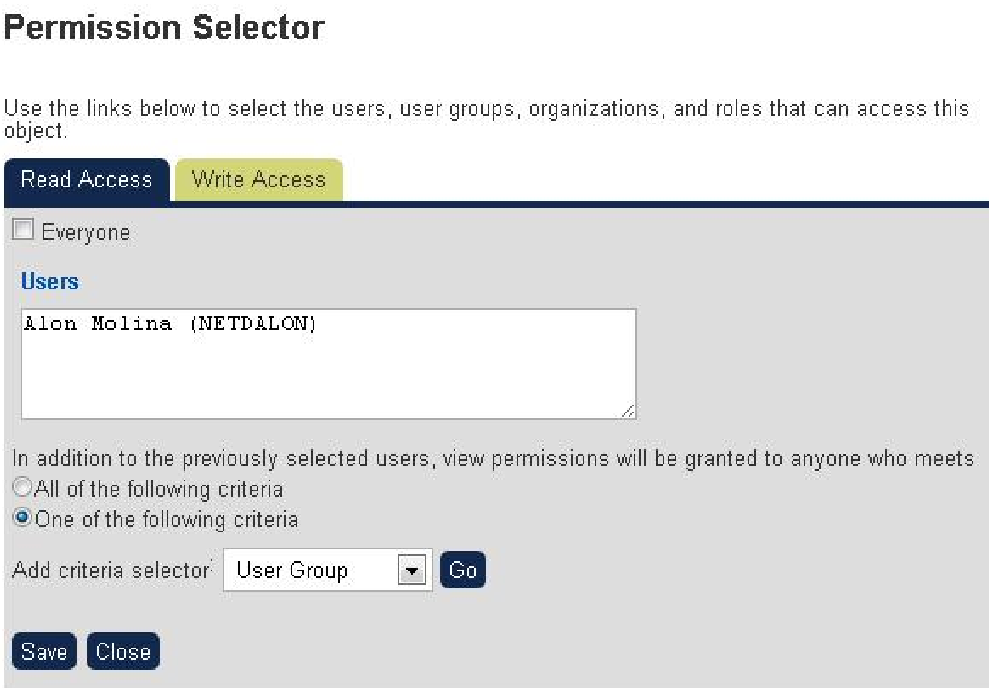
Setting Permission to Assessment Workflow

To set permission to assessment workflow:

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



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



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

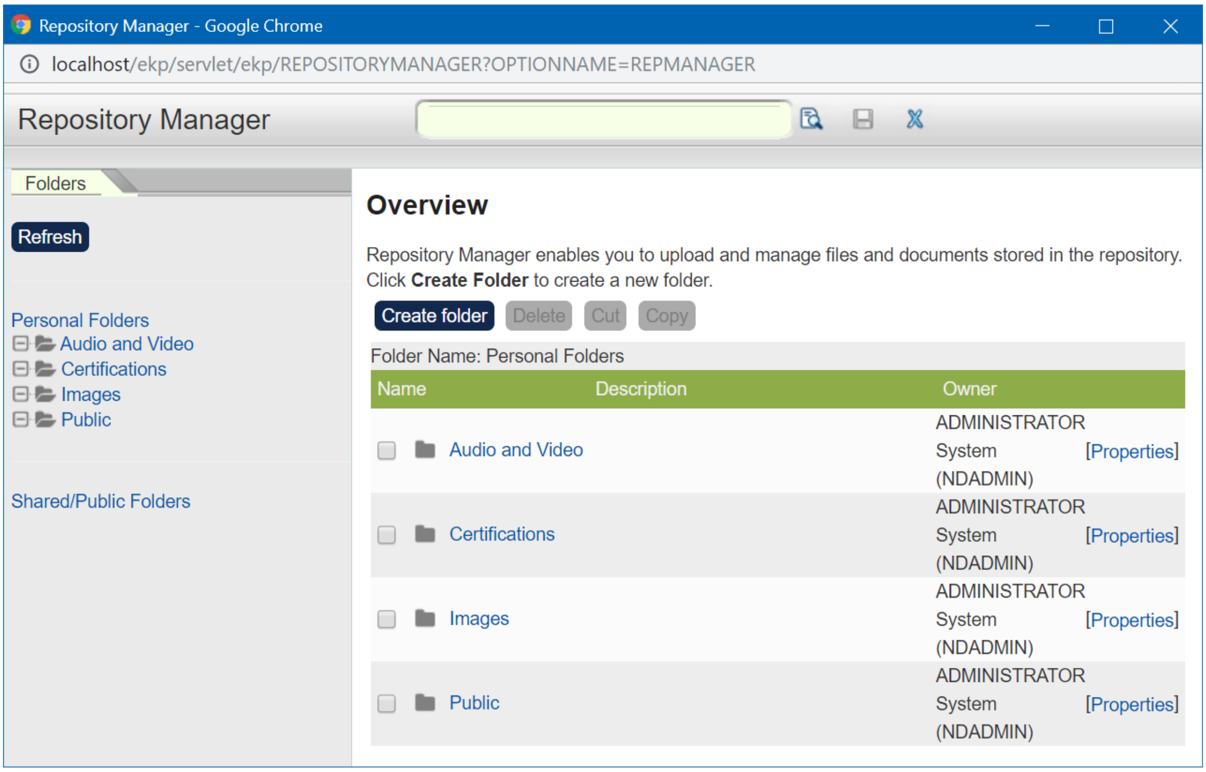
Repository Manager

You can upload and manage files for courses in the Repository Manager. Specifically, you can:

- Create folders and manage their properties and access permissions
- Delete folders and their contents

- Upload files and manage their properties and access permissions
- Delete files
- Move or copy files between folders

To open the Repository Manager, go to **Manage Center > Learning > Repository > Repository Manager**. The Repository Manager opens in a separate window.



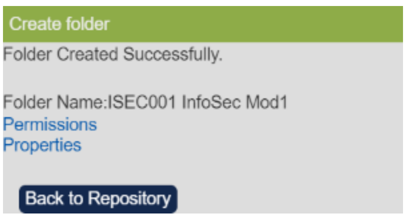
The Repository Manager segregates folders under your control (Personal Folders) from those that were created by other users and have shared access permissions (Shared/Public Folders).

Creating Folders

You can create folders to organize files for your courses and provide access to the appropriate users.

To create a new folder:

1. Click **Create Folder** and enter a name and brief description for the folder in the Create Folder form.
2. Click **Create**. A confirmation dialog summarizes the folder credentials (shown below).



You can:

- Click the Permissions link to configure access permissions for the folder and its contents.
- Click the Properties link to update the folder name or description, or to disable permission inheritance for subfolders.
- Click the Back to Repository button to return to the folder/file list.

When you return to the folder list you may need to click **Refresh** to see the new folder in the

Folders tab.

Configuring Folder Access Permissions

To configure access permissions for a folder and, by default, its contents:

1. Select the Personal Folders link in the Folders tab and click the **Properties** link for the folder in the folder/file list to open the folder's properties page.
2. Click the **Permissions...** button. The Permissions Selector page opens in a new window.

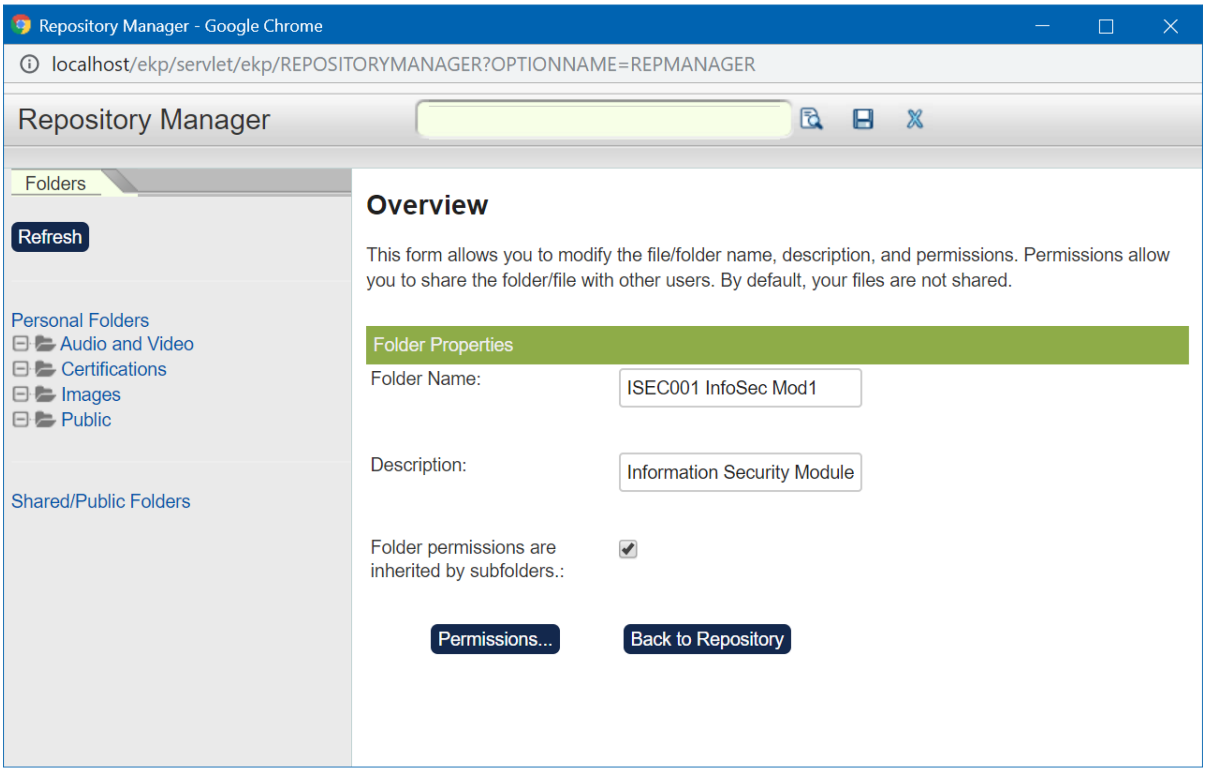
   (From the Create folder confirmation page, you can click the **Permissions** link to open the Permission Selector page directly.)

For guidance on configuring permissions to enable users to access objects in the LMS, see Standard Permission Selector in the User Administration Guide.

Updating Folder Properties

You can update a folder's name, description and permissions inheritance for its subfolders.

To update a folder's properties, click the **Properties** link for the folder in the folder list. (From the Create folder confirmation page, you can click the **Properties** link to open the folder properties page directly.)



By default a new folder's access permissions are inherited by its subfolders. You can clear the checkbox to remove this permissions inheritance in order to configure different access permissions for any subfolders.

Deleting Folders

When you delete a folder from the repository, its subfolders and files are also deleted.

To delete a folder from the repository:

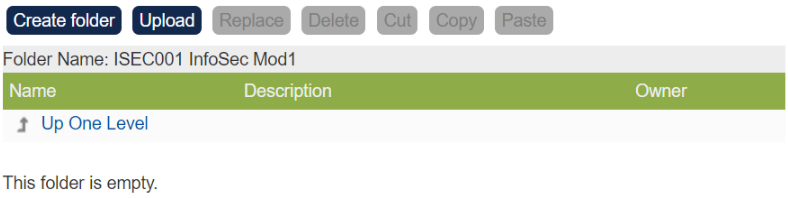
1. Click the parent folder (for example, Personal Folders) in the Folders tab to list the folders.
2. Tick the box for the folder you want to delete in the folder list and click the **Delete** button. You are asked to confirm the deletion.

Uploading Files

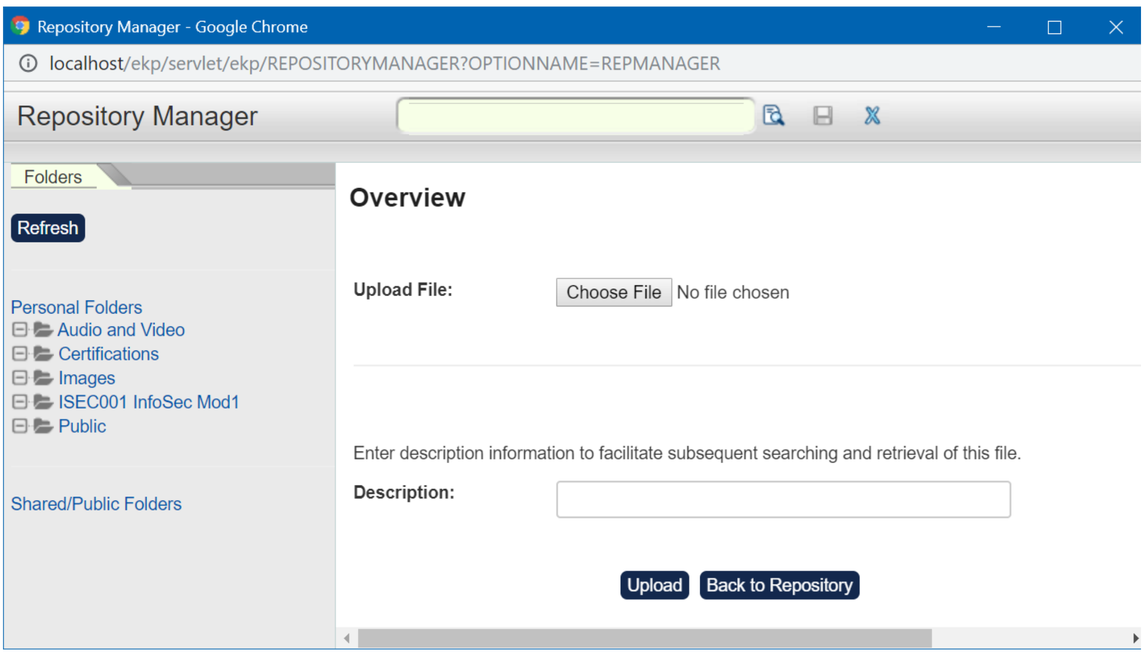
You can select only individual files to upload to the repository. To upload multiple files, compress them to a zip file to upload. You can zip and upload a folder containing multipe files and subfolders, and the folder hierarchy will be preserved in the repository.

To upload a file into a folder:

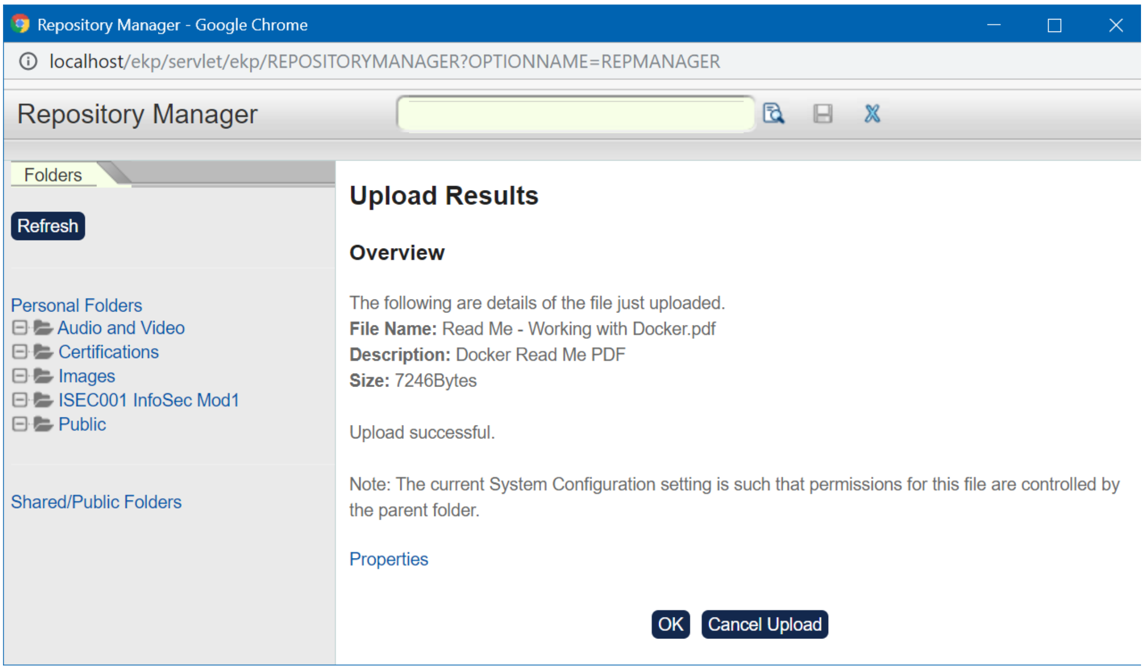
1. Select from the Folders tab the folder (or subfolder) you want to upload the file to and click **Uplo ad**.



The file selection page opens (shown below).



2. Choose the file to upload and enter a brief description, then click **Upload**. When the file has uploaded, the Upload Results page summarizes the file (shown below).



3. Click **OK** to complete the upload, or you can cancel the upload.
4. If you are uploading a zip file, click the **Unzip** button. When you unzip a compressed file the Repository Manager creates a subfolder with the same name as the zip file and then copies the individual files into it. Both the zip file and the new subfolder and unzipped files are uploaded to the repository.

Configuring File Access Permissions

To configure file access permissions:

1. Select the Personal Folders link in the Folders tab and click the **Properties** link for the file in the folder/file list to open the file properties page.
2. Click the **Permissions...** button.

For guidance on configuring permissions to enable users to access objects in the LMS, see Standard Permission Selector in the User Administration Guide.

Deleting or Replacing Files

To delete one or more files from the repository, tick the boxes of the files you want to delete and click **D elete**. You are asked to confirm the deletion.

You can replace a file with a new file to keep the same URL, which is useful if you there are links to the original file from elsewhere in the LMS. Replacing a file means those links will point to the new replacement file.

To replace a file:

1. Select the folder containing the file and in the file list tick the box of the file you want to replace.

2. Click the **Replace** button above the file list. The file upload page opens.
3. Choose the file to upload, which will replace the existing file, and click the **Upload** button. The Upload Results page summarises the replacement file details.
4. Set the properties and permissions for the replacement file. (For guidance on configuring permissions, see Standard Permission Selector in the User Administration Guide.)
5. Click **OK** to complete the upload.

> **Note**
> You cannot directly replace a file with a file from another folder in the repository because the replacement file must be uploaded. You can, however, download the replacement file from its original folder (by clicking its name in the file list), and then upload it when you replace the unwanted file.

Moving and Copying Files Between Folders

You can copy files to duplicate them, or cut and paste them to move them from one folder to another in the repository.

To copy, cut and paste files:

1. Select the folder containing the file(s) and in the file list tick the box of the file(s) you want to copy or move.
2. Click **Copy** or **Cut**.
3. Select the destination folder or subfolder to copy or move the file(s) to, and click **Paste**. The file(s) are copied or moved to the destination folder.

E-mail

You may send individual e-mails on an ad-hoc basis or on an event-triggered basis using a predefined email template. Email messages may also be sent in bulk. The E-mail Template Editor allows you to create e-mail message templates that both incorporate a predefined message and specify to whom the message is to be sent when an event occurs. For example, a message may be sent upon a participant's successful enrollment in a course both to the participant and his immediate manager.

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

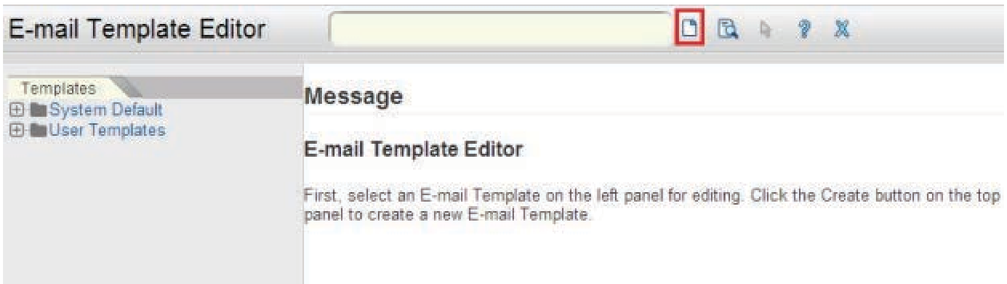
Accessing the E-mail Template Editor

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

Creating E-mail Templates

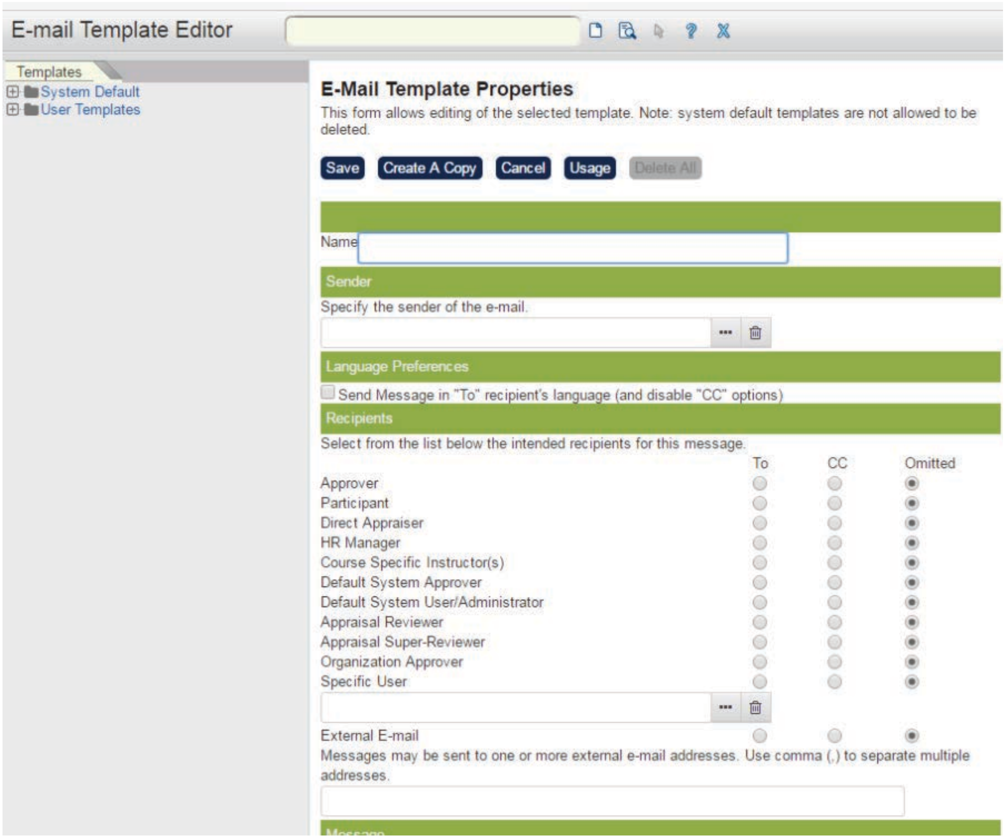
To create a new e-mail template from the *E-mail Template Editor*:

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



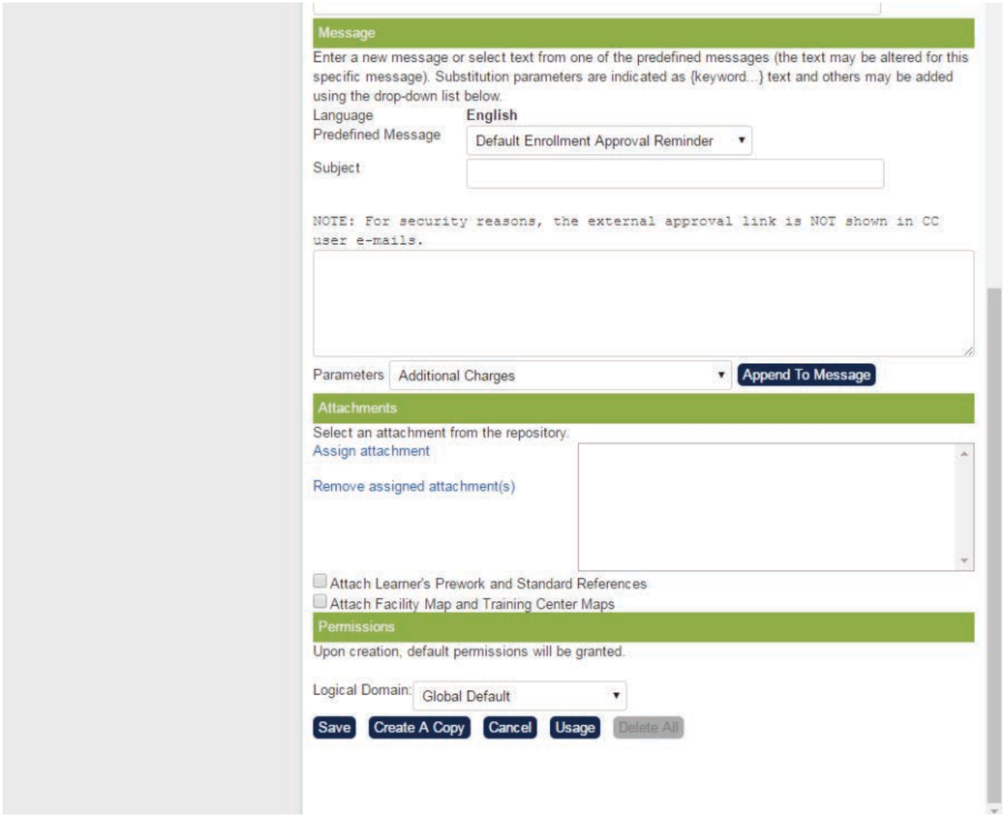
2. The *E-mail Template Properties* screen allows you to enter the following parameters:

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



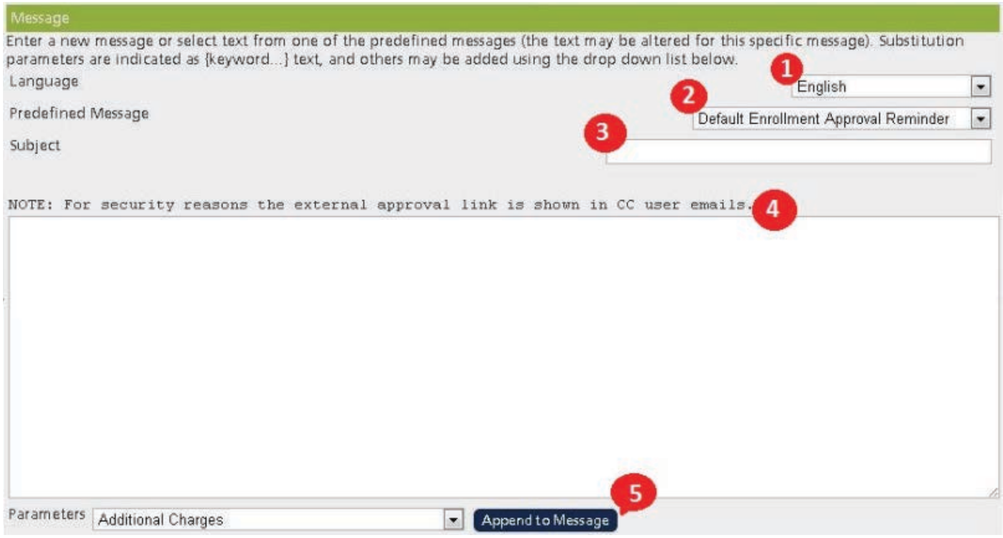
Top half of the Email template

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



Bottom half of the email template

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



	In creating a message:
1	**Language:** You can select the language to be used in sending the message. **Note:** Users can change their language preferences in Settings and if a matching language has been configured for a template, they will receive the e-mail in their preferred language.
2	**Predefined Message:** Alternatively, you can select a pre-defined message from the drop down list appearing by the Predefined Message field. However, these predefined messages were intended for course-specific functions and not designed as general-purpose messages. If you select a pre-defined message, the message will appear in the message section. You may edit this message.
3	**Subject:** Enter the subject of your email on the subject entry field.
4	**Message Box:** The message box allows you to enter the content of your email message or edit the selected predefined messages.
5	**Append Parameters to Message:** E-mail Template Editor allows dynamic parameters to be embedded in the e-mail template, e.g. {course_title} for the course title. There are other parameters that can be embedded in the e-mail template (please see the list on the table below):

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

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

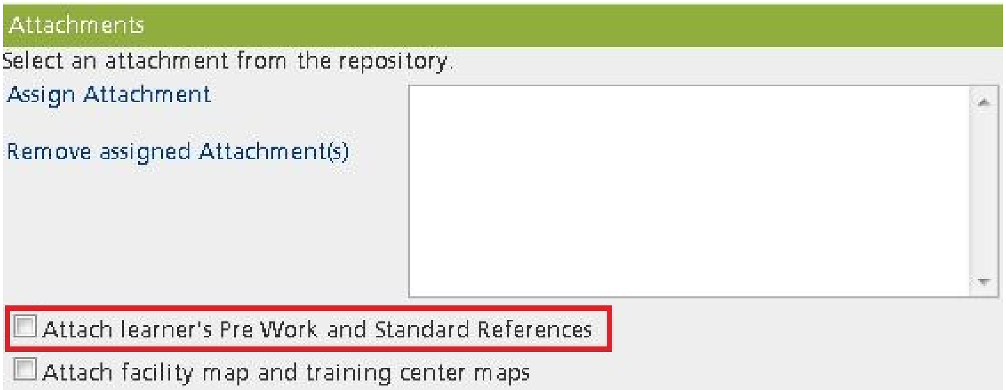
To automatically enter the specific parameters into this message (e.g. the name of the participant):

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

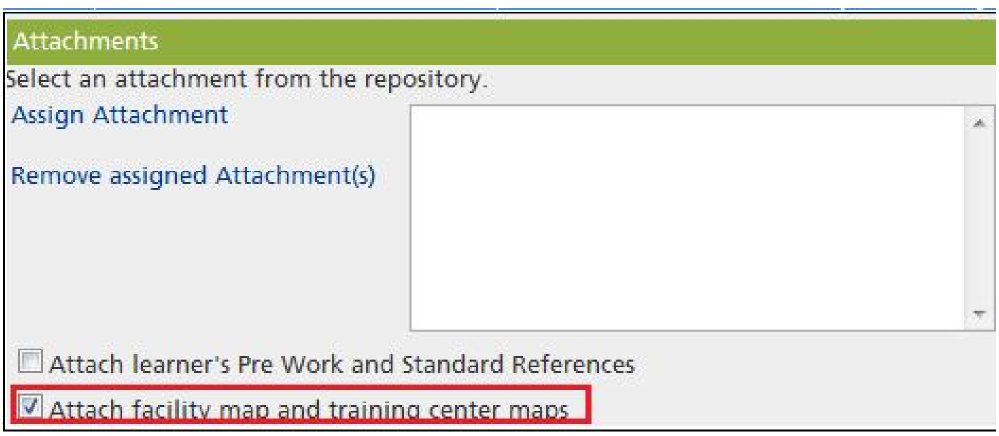
Note: You need not specify parameters for a bulk message.

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

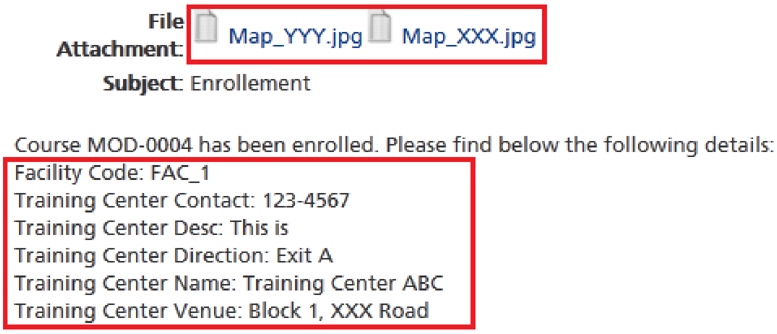
a. Click the Assign Attachment hyperlink. The Repository Manager screen appears in a separate window.
b. Select the desired file(s).
c. To remove an attachment, click on the file and click the Remove assigned Attachment(s) hyperlink.
d. **Attaching Learner's Pre Work and Standard Prefences :** Files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



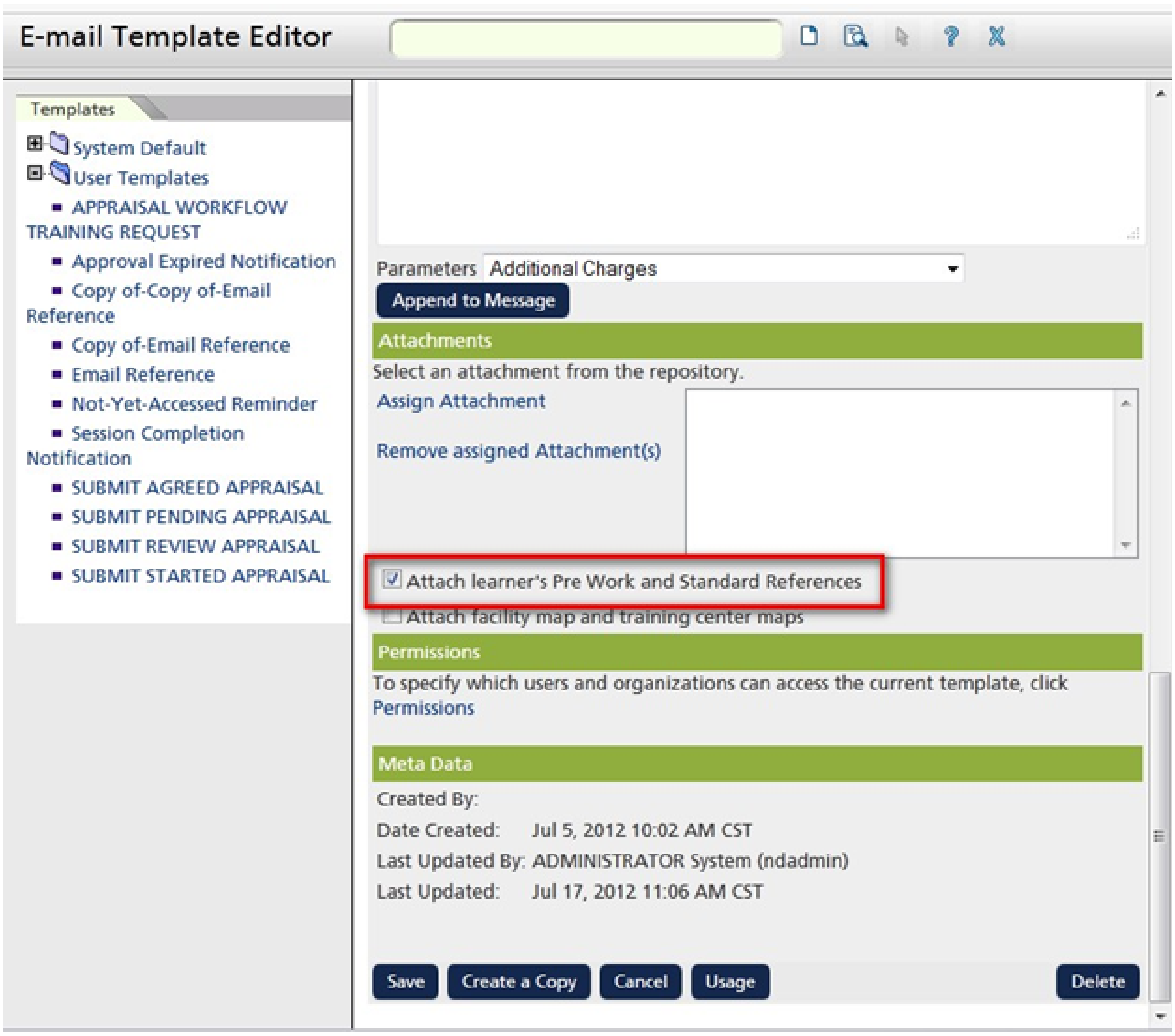
Attaching Facility Map and Training Center Maps: To attach the facility map and training center maps as to the email template, tick the box beside the "Attach Facility Map and Training Center Maps".



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



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

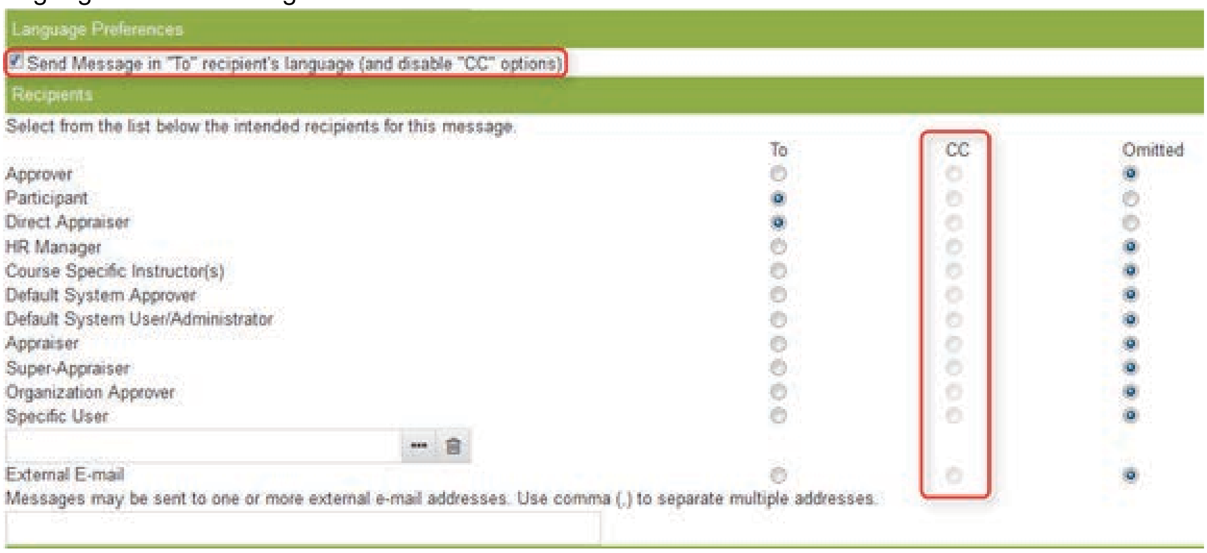


Email Templates Sent in Recipient's Language

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

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

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



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

Add NewAssignmentID Column to Users CSV Format

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

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

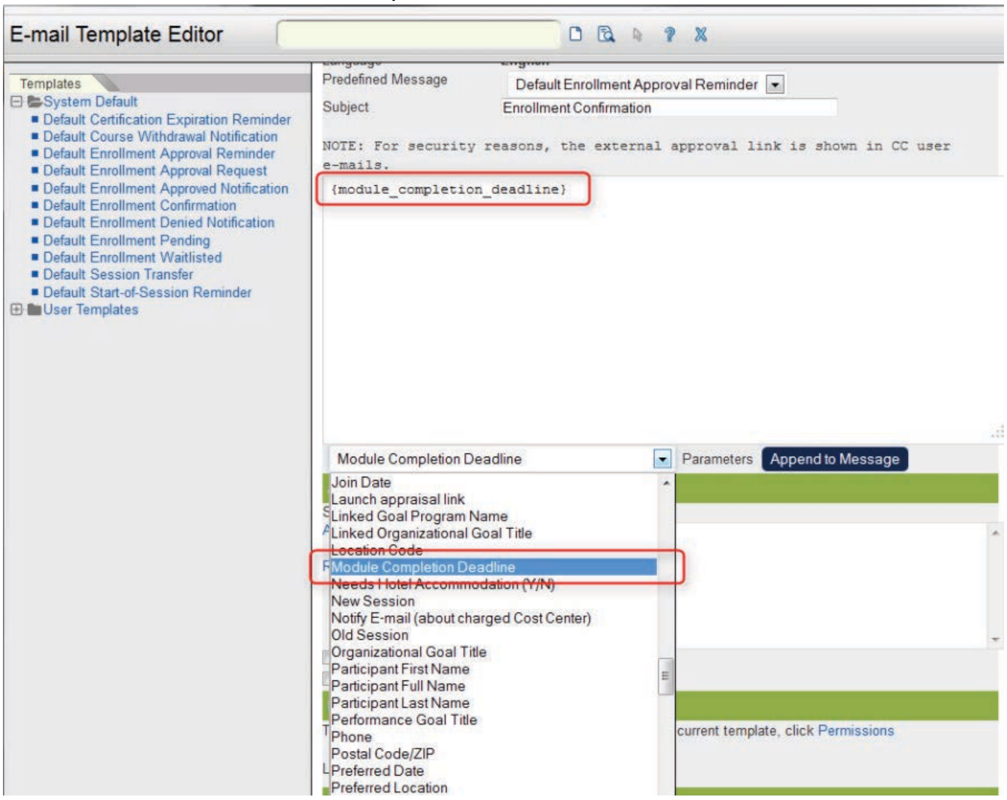
When adding a new assignment, if both AssignmentID and NewAssignmentID are specified, this NewAssignmentID value will take precedence; when updating an existing assignment, use this NewAssignmentID to update to a new ID if the specified AssignmentID does exist.

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

E-mail Template Parameters

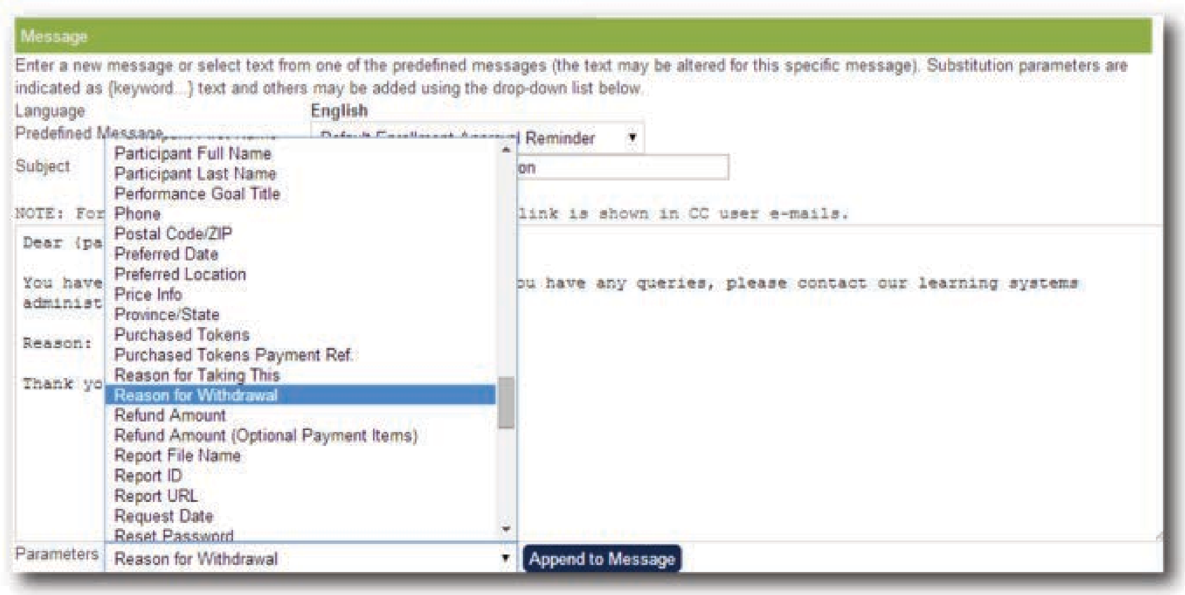
Module Deadline as E-mail Template Parameter

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

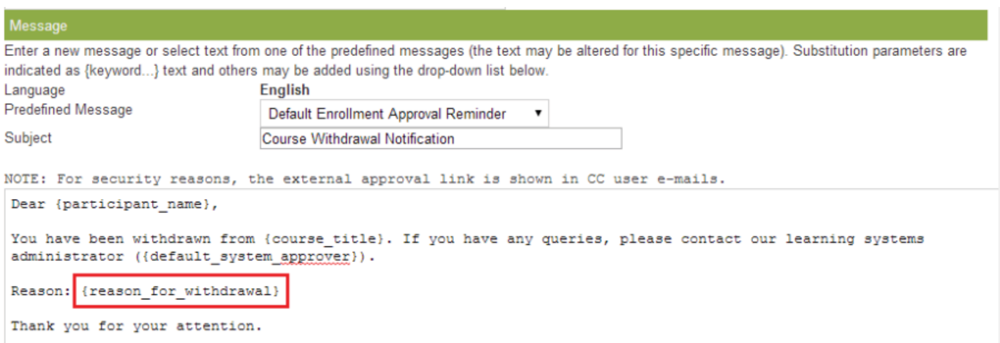


Withdrawal Reason as Email Template Parameter

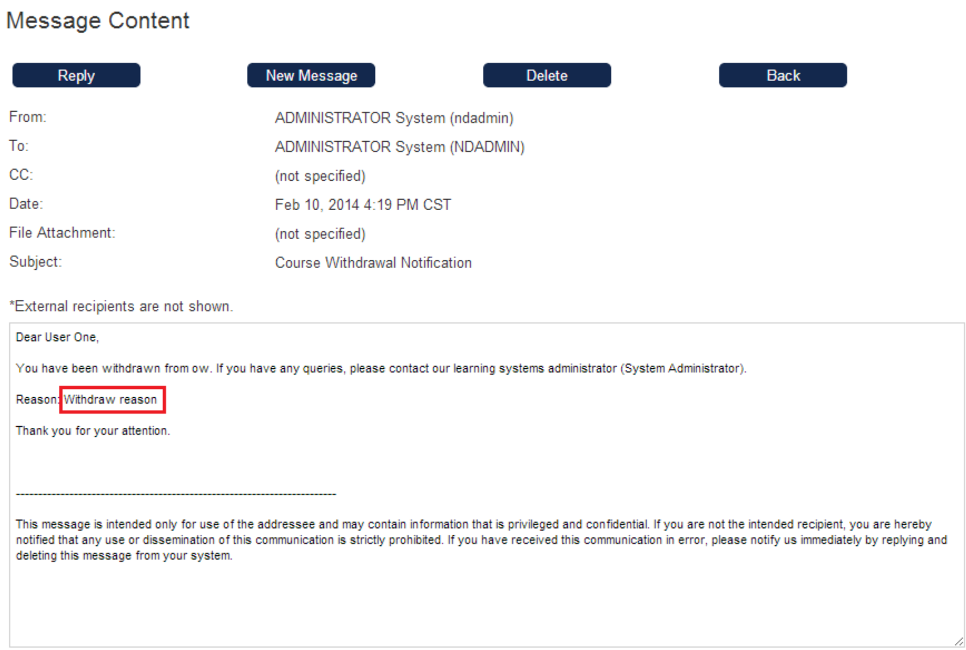
Users can now configure courses to require a reason for withdrawal. The related template parameter "Reason for Withdrawal" is now available in the system.



Reason for Withdrawal parameter on email template editor



Adding the Reason for Withdrawal parameter on an email template



A sample email content having the Reason for Withdrawal

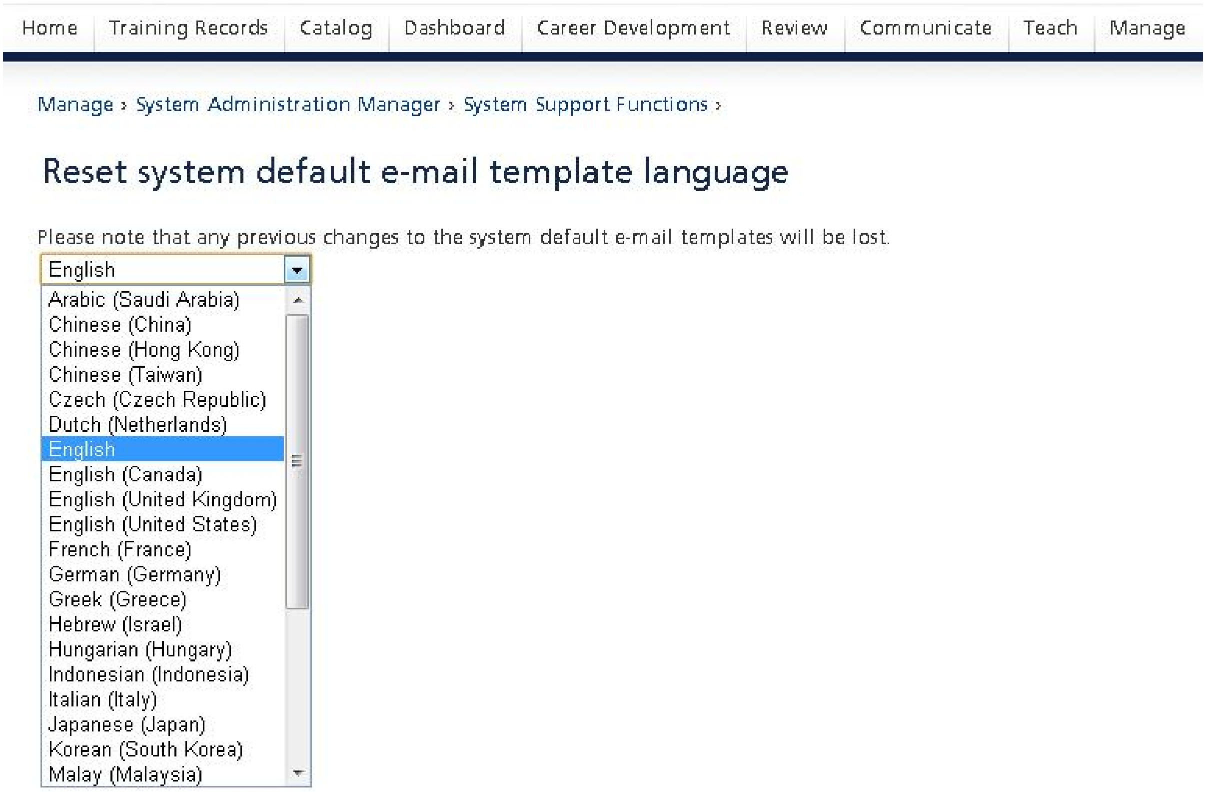
Languages for Email Templates

Changing the Default Language for E-mail Templates

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

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

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



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

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

Adding Other Languages to an E-mail Template

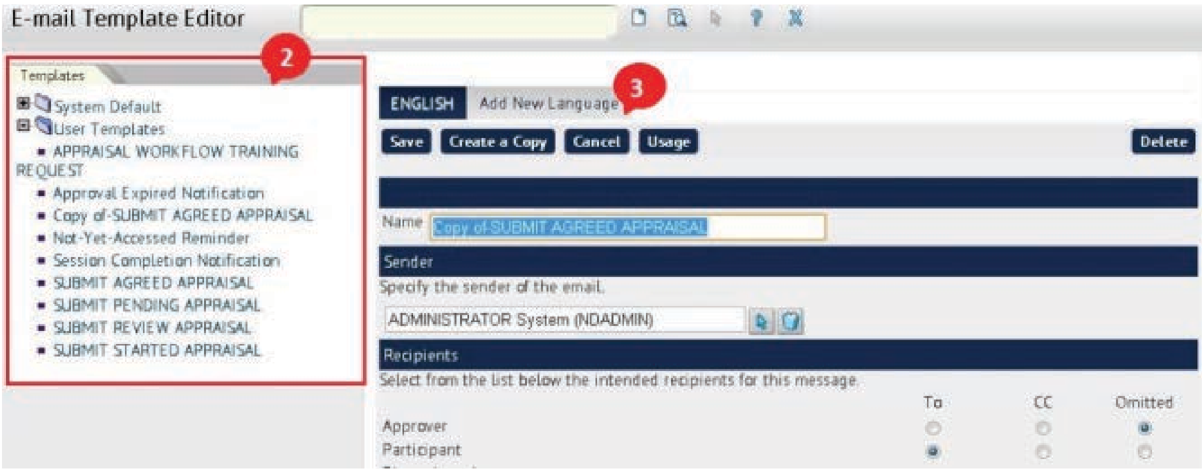
This feature allows the user to add other language to an email template editor. By adding other language to an email template allows the user to send email messages to other language.

To do this:

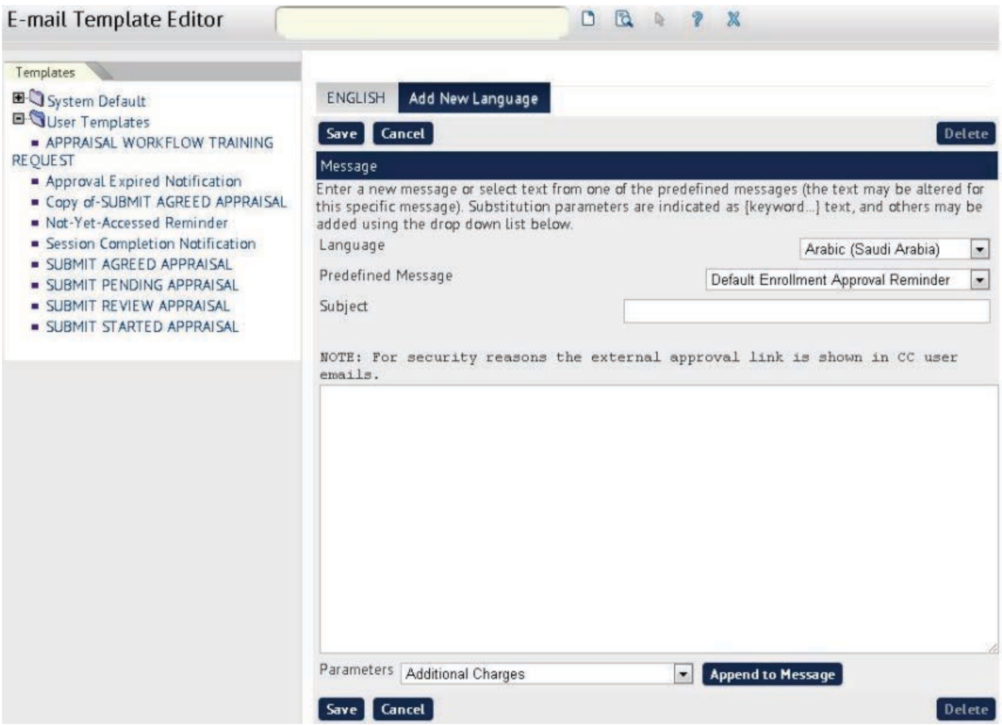
1.Proceed to email template editor by going **Manage Center > Communicate > Email Manager > Email Template Editor**.

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

3.Click the Add New Language.



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



5.Select the Predefined Message.

6.Enter the Subject

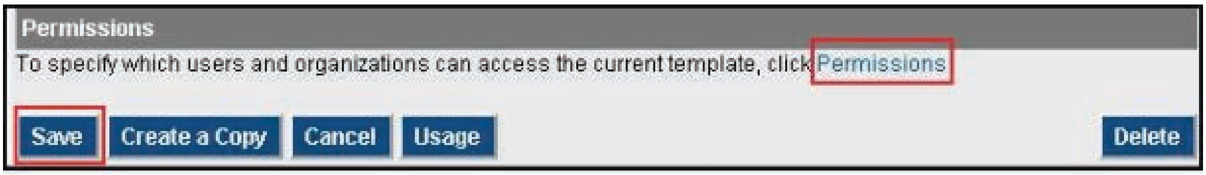
7.Click the **Save** button to keep the changes.

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

Specifying Access Rights

You may also specify read/write access:

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



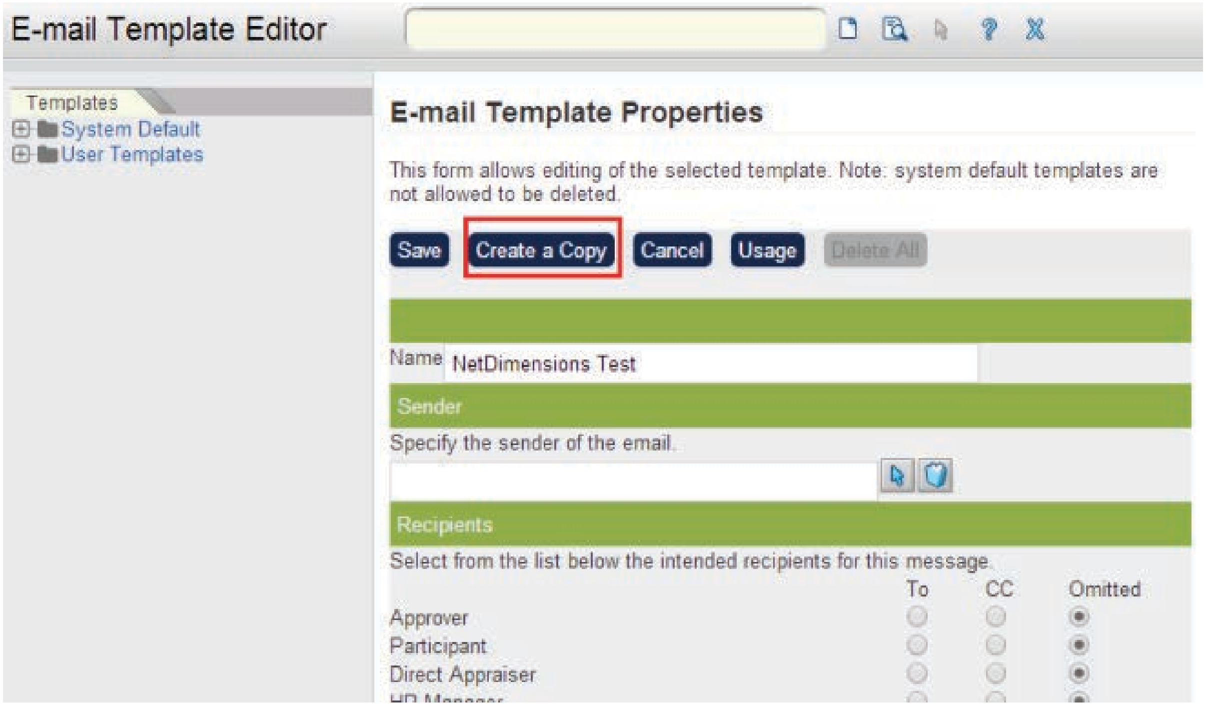
2.Choose the persons with read/write access rights in the Permissions Selector screen that appears.

3.Click **Save**.

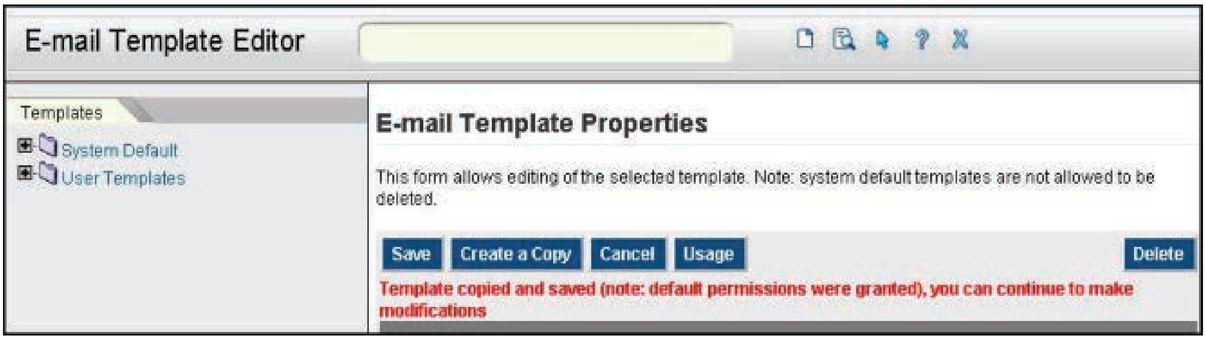
Duplication of E-Mail Templates

To make a copy of the template:

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



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

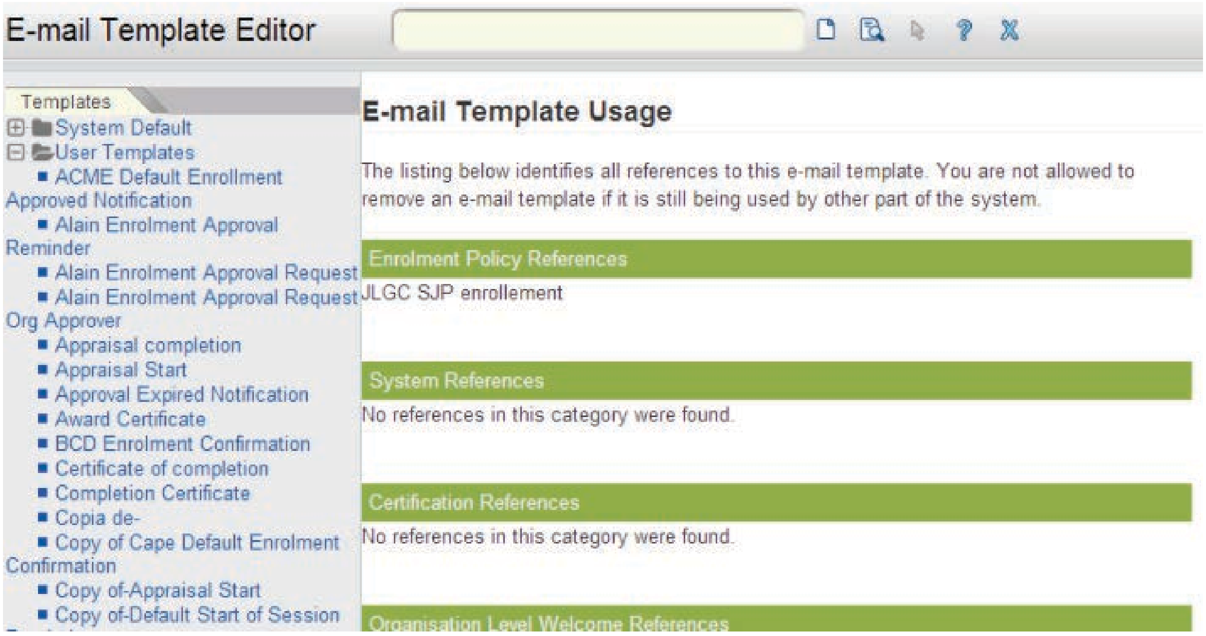


3.Close the *Email Template Editor* screen by clicking the **Close** icon.

Deleting E-mail Templates

To delete an existing e-mail template:

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



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

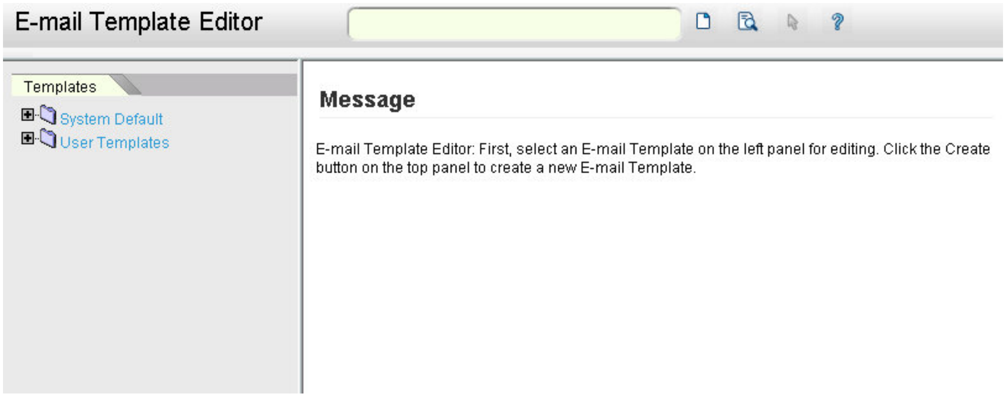
4.If you have determined that template is not being used in any enrollment policy or that its deletion will not result in adverse consequences, click **Delete**. A confirmation dialog box appears.

5.Confirm to delete

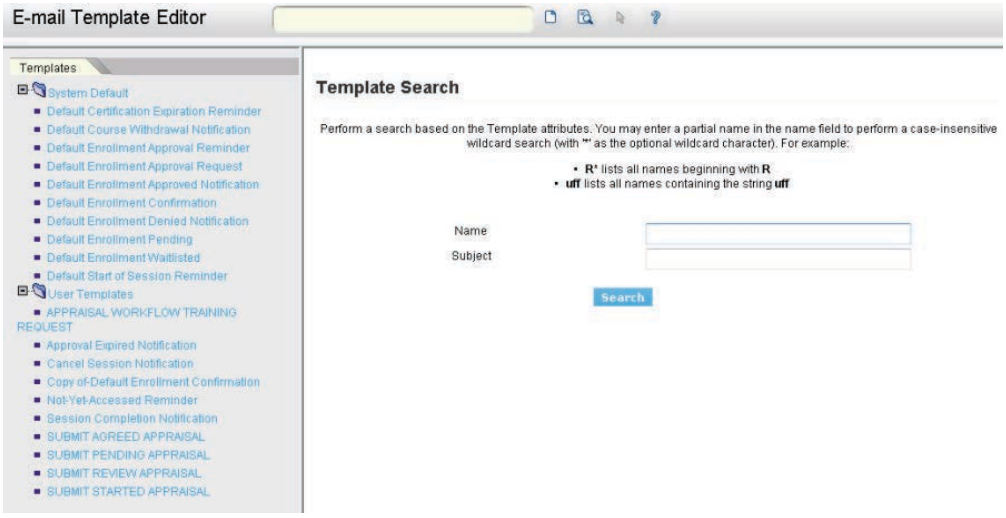
Searching for E-mail Templates

To search for an existing e-mail template:

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

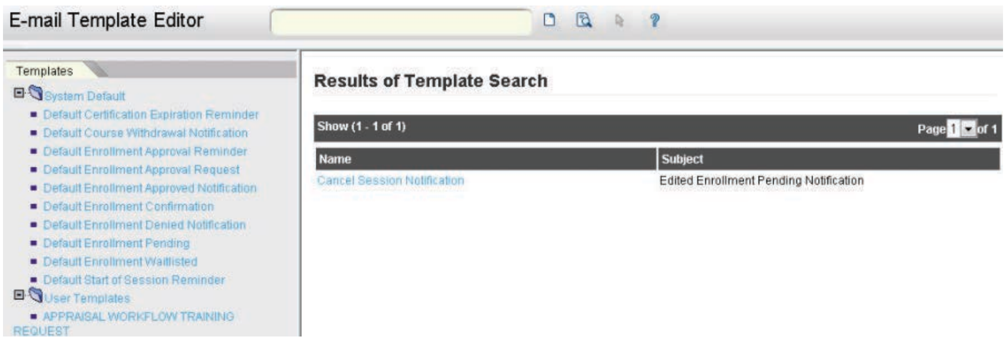


2.The *Template Search* screen appears.



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

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



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

Sending Bulk E-mail Messages

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

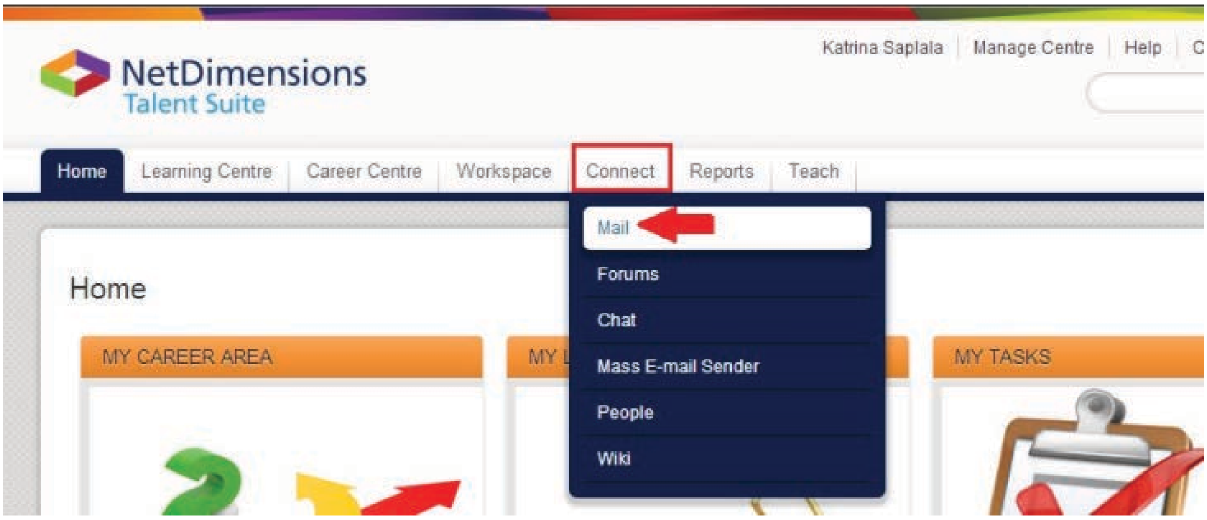
A mass or bulk e-mail message can be sent either from the Catalog Editor or from the Mass e-mail functions in Communicate.
Choosing between the two options:

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

Sending Bulk E-mail from the Communicate Page

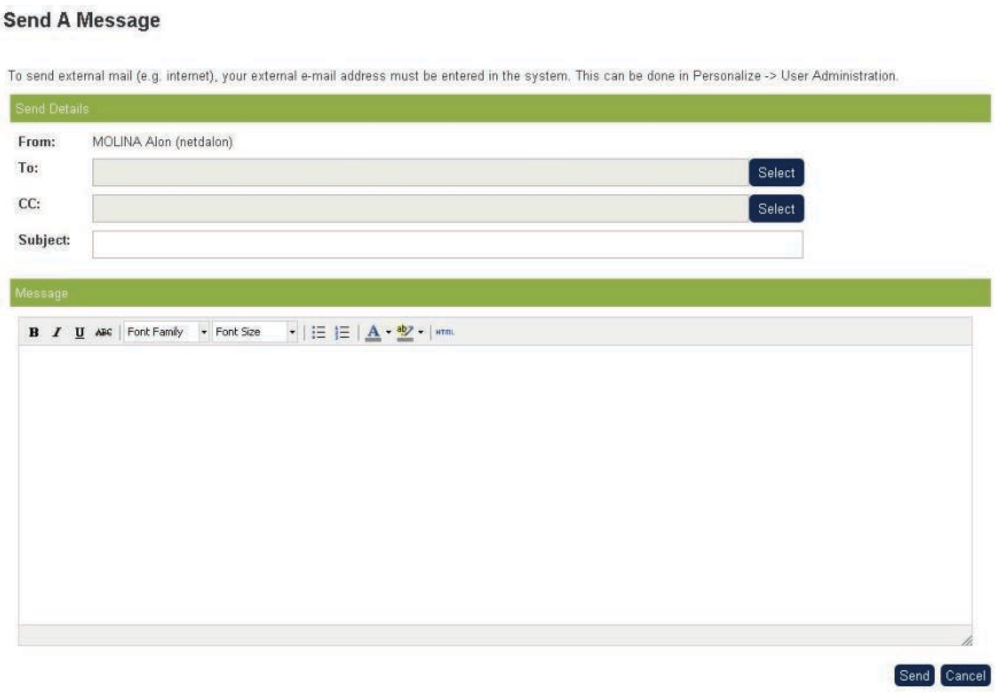
To send a bulk (or mass) e-mail from the Communicate Page:

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



2.Click the **Create**.

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



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

5.Enter your message under the Message section.

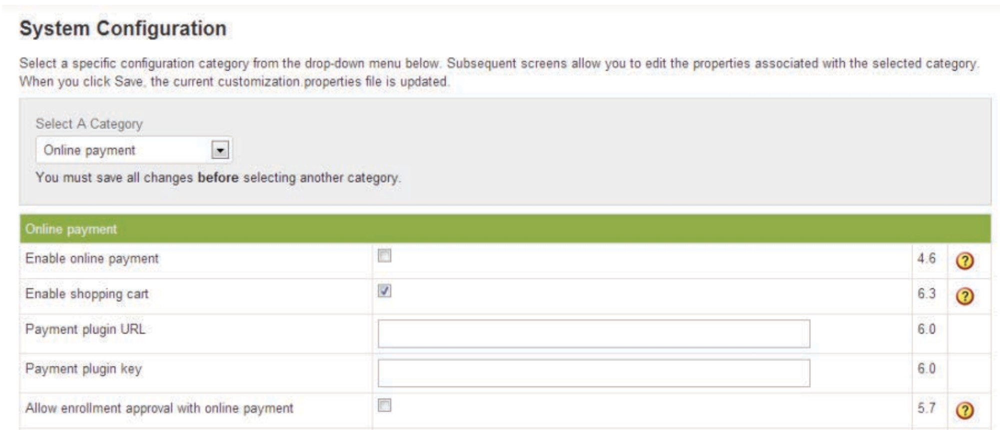
6.Click the **Send** button.

Welcome Email

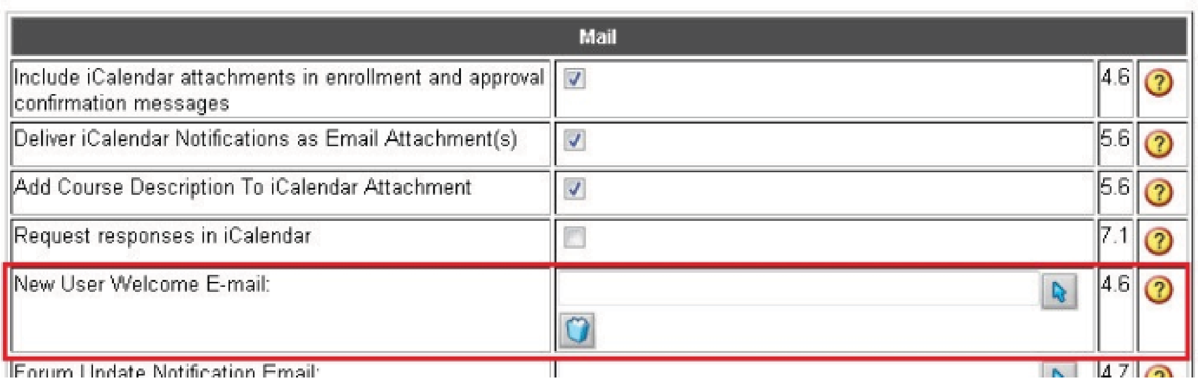
Configuring the New User Welcome Message

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

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



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



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

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

Enhanced Welcome Email Handling

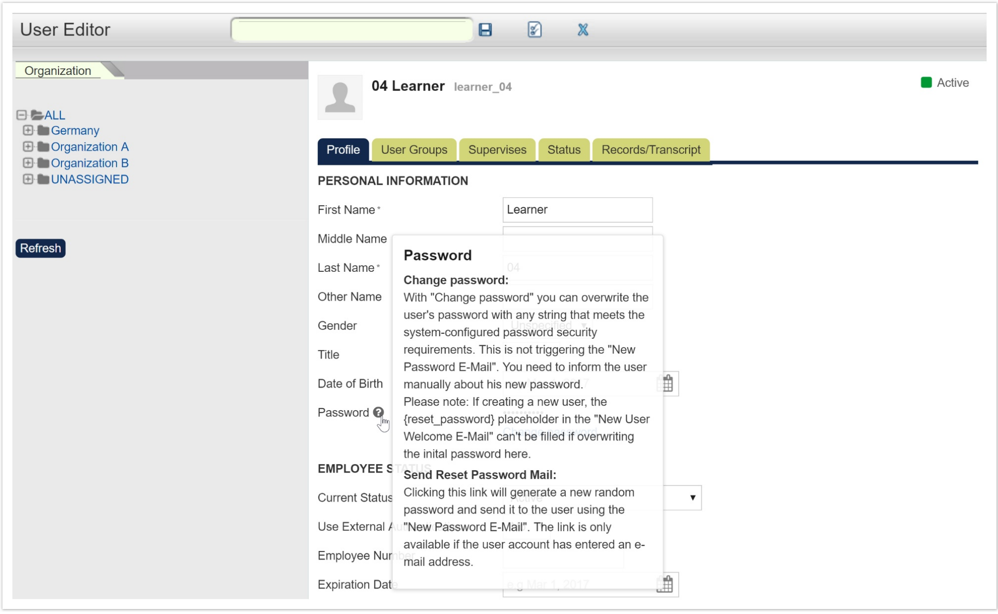
Previously, the Welcome Email was based on users added in the last 24 hours - this made it problematic to send a welcome email to users who were loaded in advance of being ready to use the system, or who had missing email information in the initial load. In some cases these users may have been added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

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

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

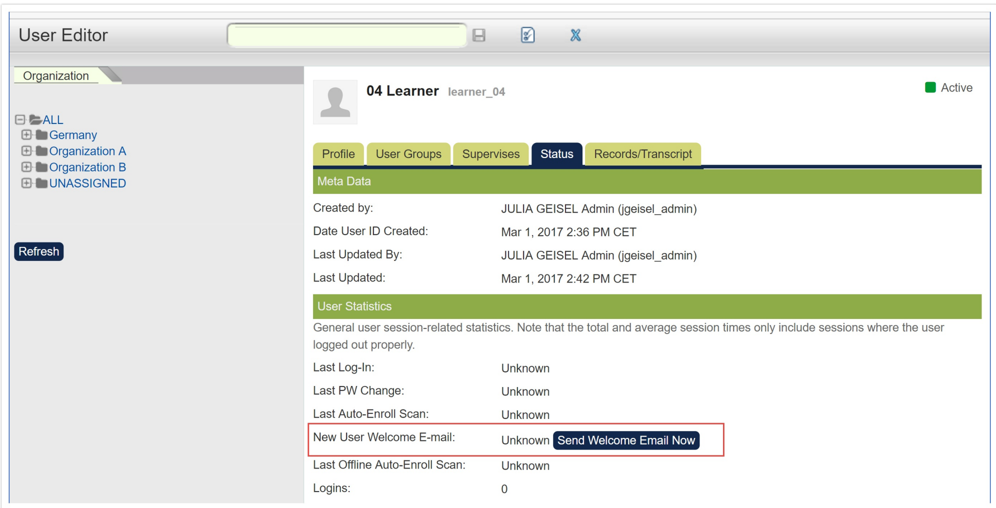
Help Text for Password

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

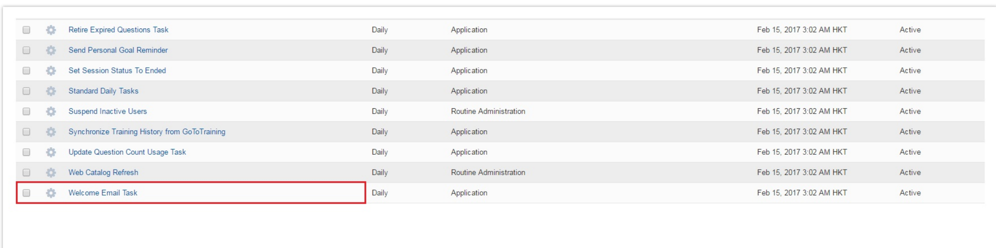


Immediately send out the New User Welcome E-Mail

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



Or manually run the Welcome Email Task.



Sending mail to the internal mail box

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

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

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

Enrollment Policies

(available for Performance and Learning only)

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

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

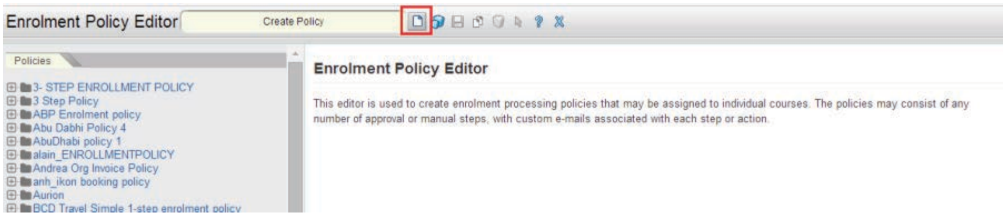
You can create as many enrollment policies as you need with any number of steps. The Enrollment Policy Editor can be accessed from the module properties of a learning object or directly from the Catalog Manager screen.

Adding Enrollment Policies

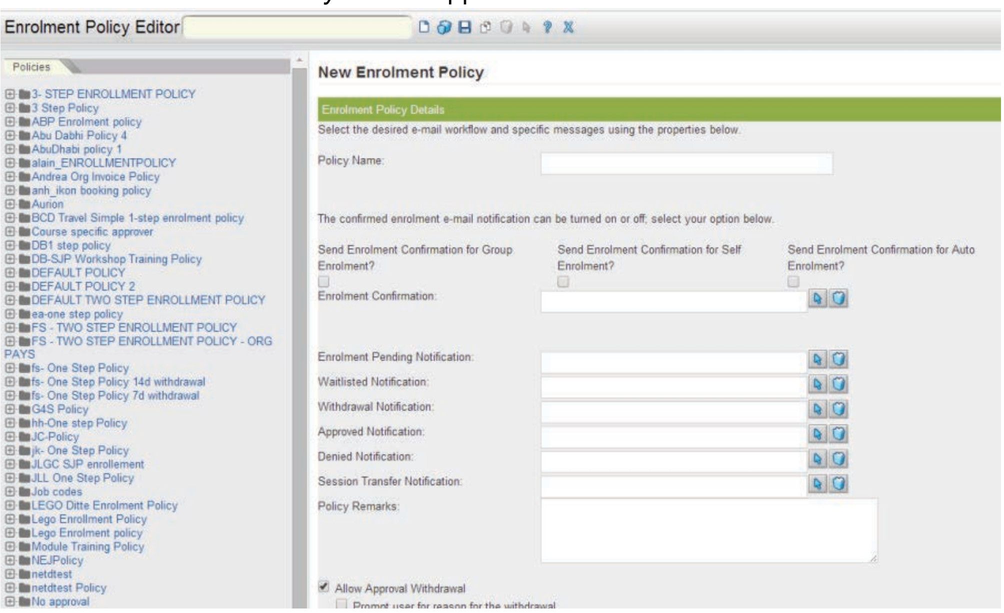
To create enrollment policies:

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

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



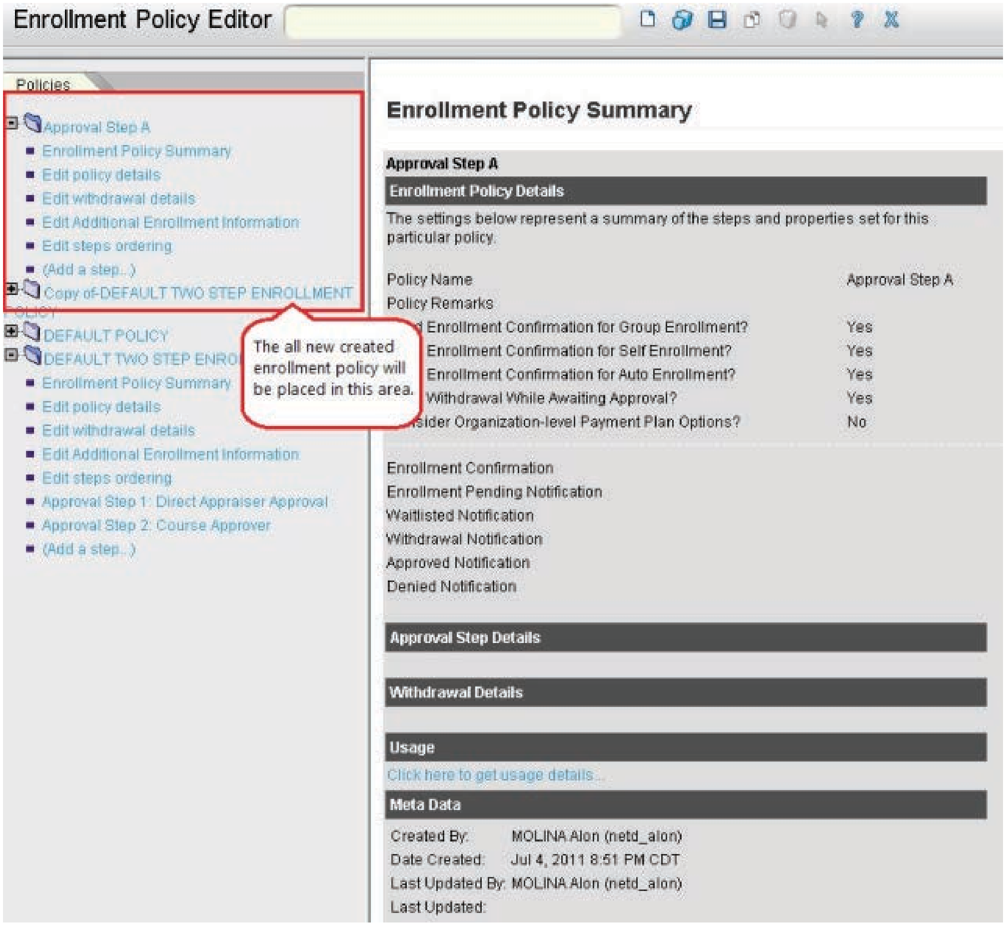
3.The *New Enrollment Policy* screen appears.



4.Fill in the details.

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

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



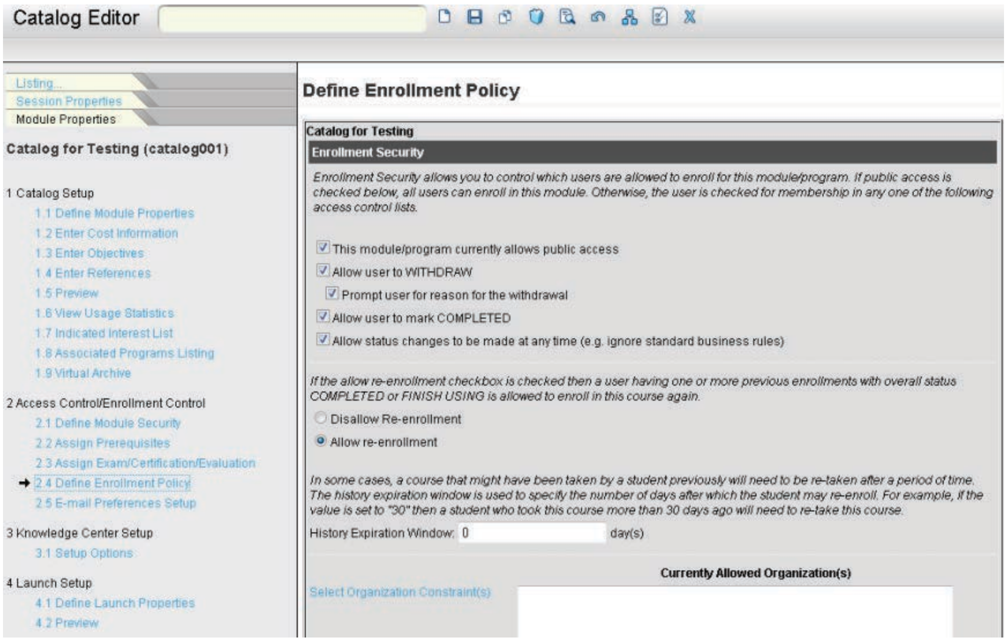
Associate Enrollment Policies with a Learning Module

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

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

2.Choose a Learning Module.

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



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

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

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

6.Specify whether users will be allowed to mark COMPLETED

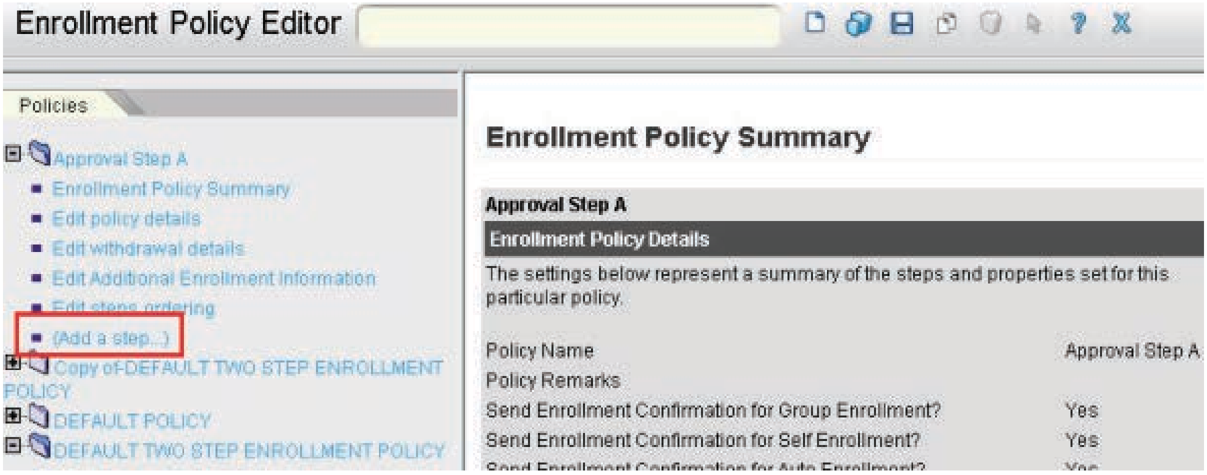
7.Specify whether users will be allowed to make changes to their enrollments, click on the box in the Allow status changes to be made at any time field.

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

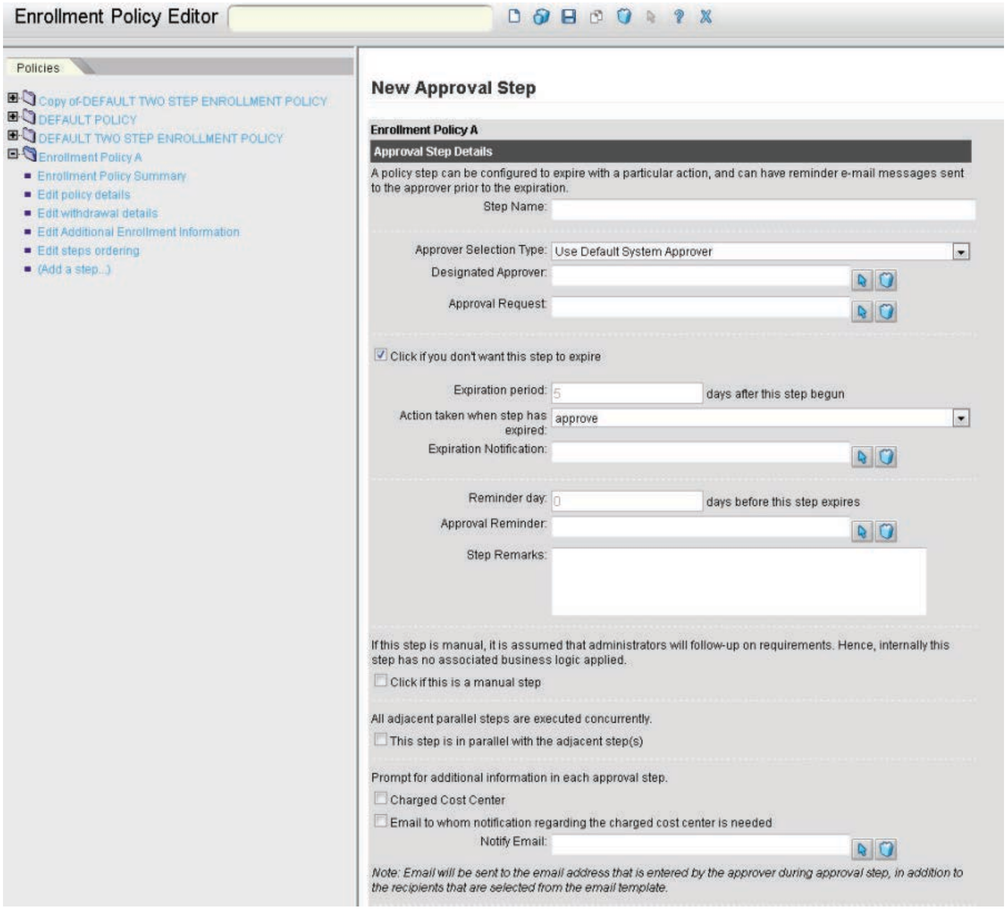
Specify Policy Steps

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

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



2.The *Approval Step Details* screen appears.

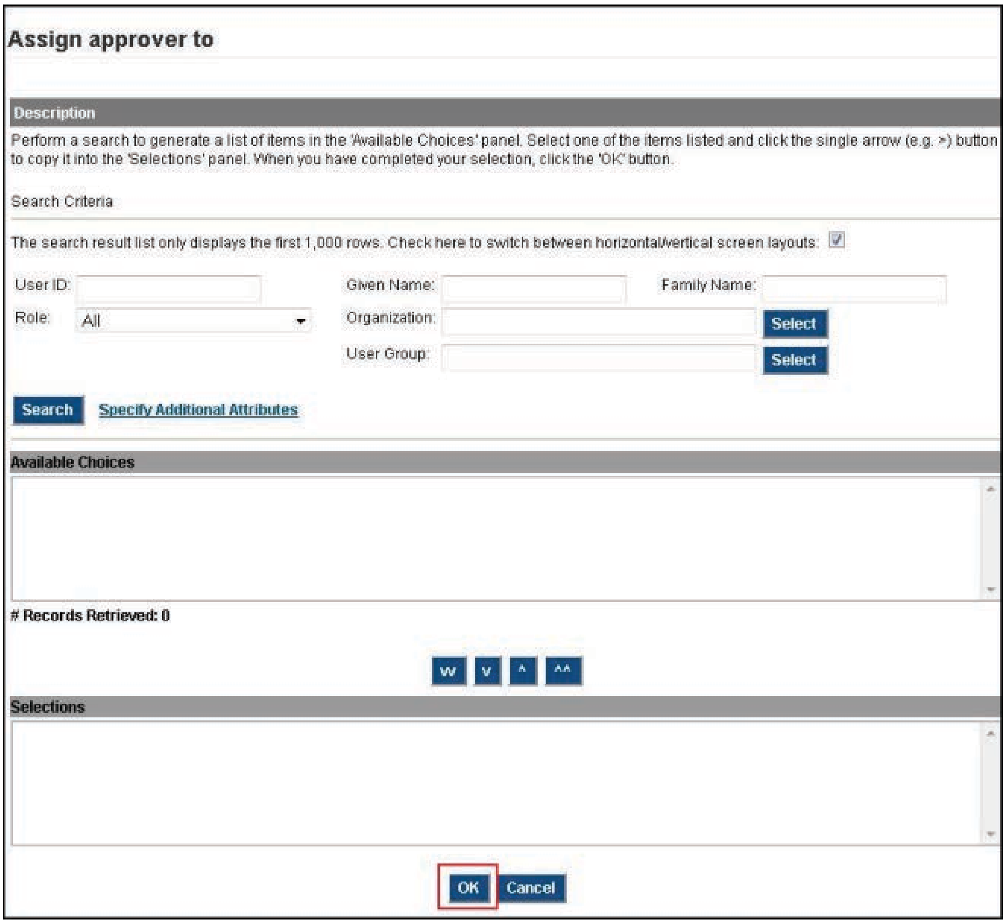


3.Specify the designation in the Step Name field.

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

5.Select the Designated Approver.

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



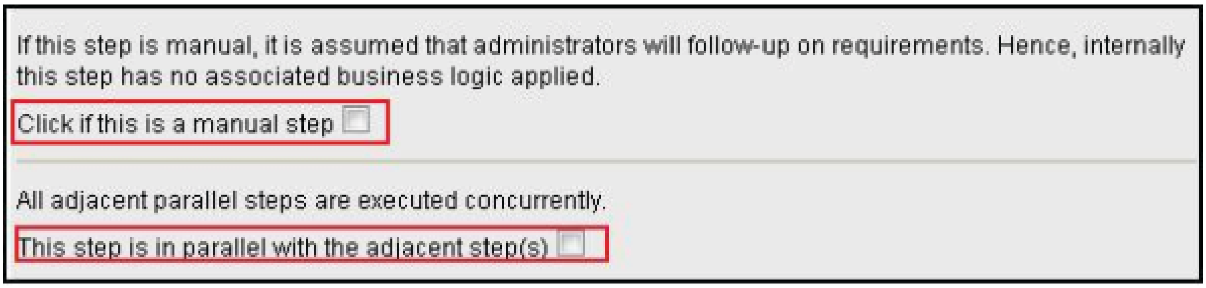
7.Make your selection from the Available Choices field.

8.Click **OK**.

1. ### Step Expiration and Reminder Messages

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

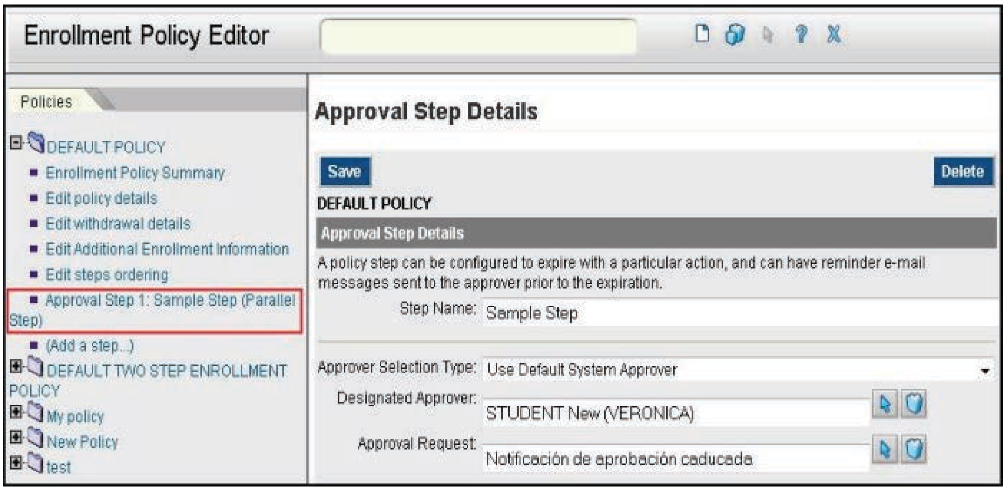
1. ### Manual Step



1. Should you prefer not to have any business logic applied to this step and have administrators follow up on requirements manually, scroll down and click on the **Click if this is a manual step**

box.

2. If you want to run this step in parallel with other steps, check the box by the **This step is in parallel with the adjacent step(s)** box.
3. Click **Save**. The new step appears in the Policies column in the left navigation pane.



4.From here, proceed to:

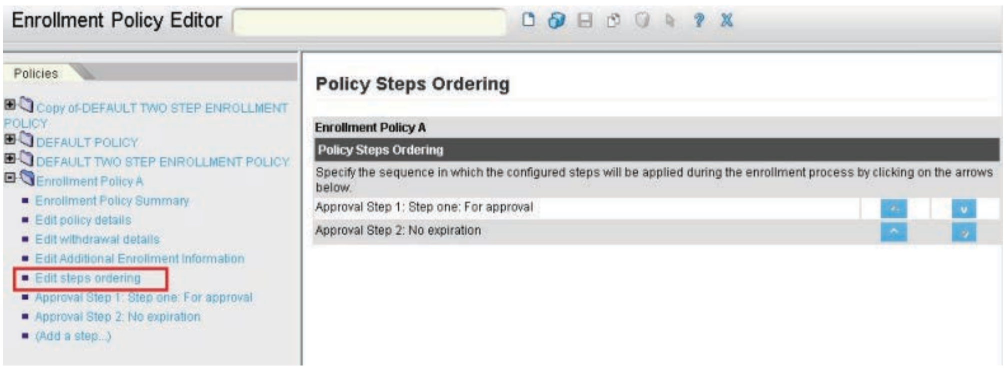
1. Add additional steps
2. Edit the order of the steps

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

Editing the Order of the Steps

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

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



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

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

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

Deleting Steps

To delete a step:

1.Click on the desired step in the Policies column.

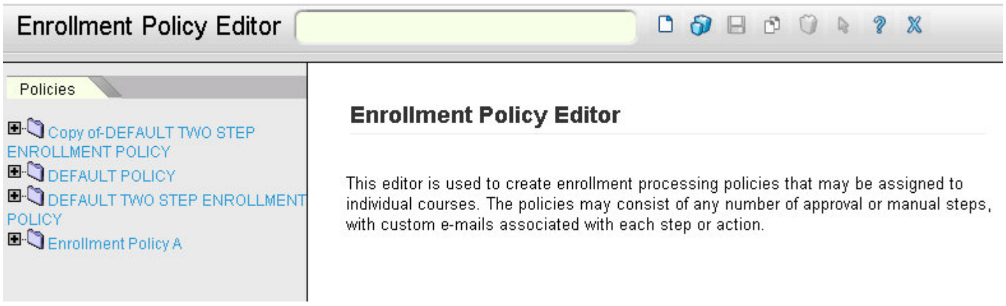
2.Click **Delete** in the lower right corner of the page.

3.Confirm delete

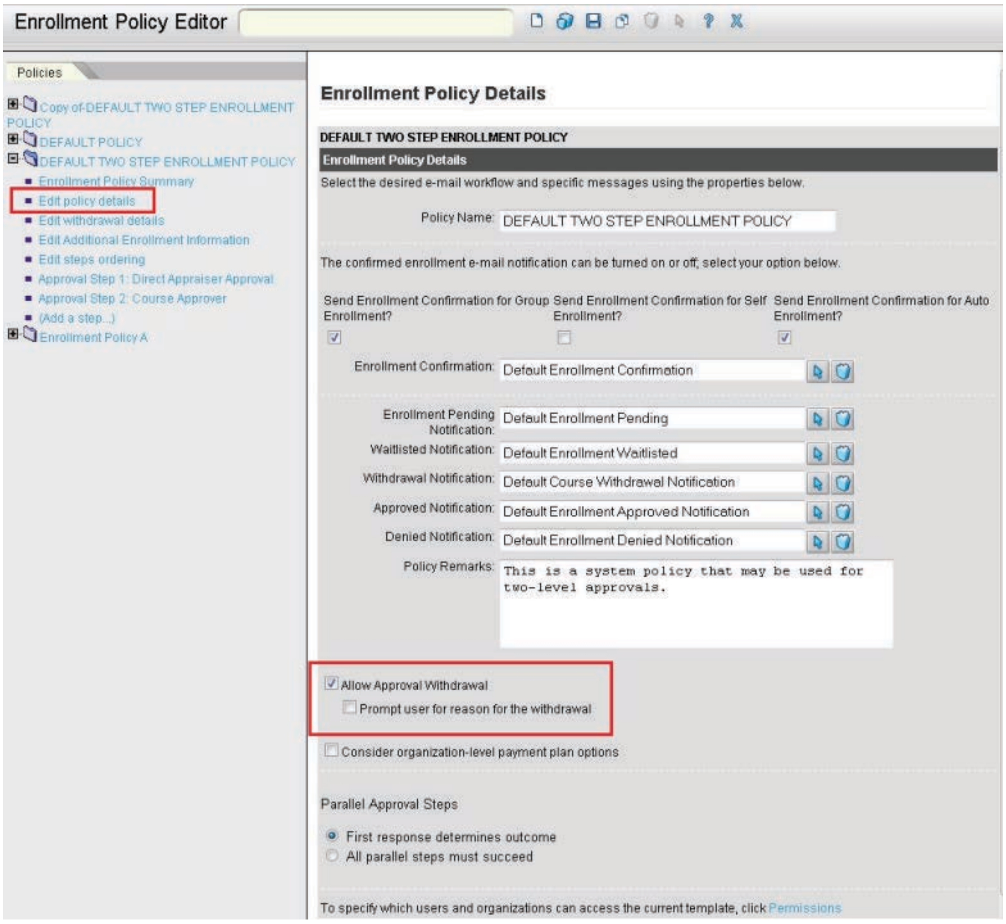
Withdrawal

You can configure for a learner to be prompted for a withdrawal reason when withdrawing from an enrollment awaiting approval.

1. Click **Manage Center > Learning > Enrollment Settings > Enrollment Policy Editor**. The Enrollment Policy Editor page appears.



2. Choose a folder under the Policies tab and click Edit policy details. The Enrollment Policy Details page appears.

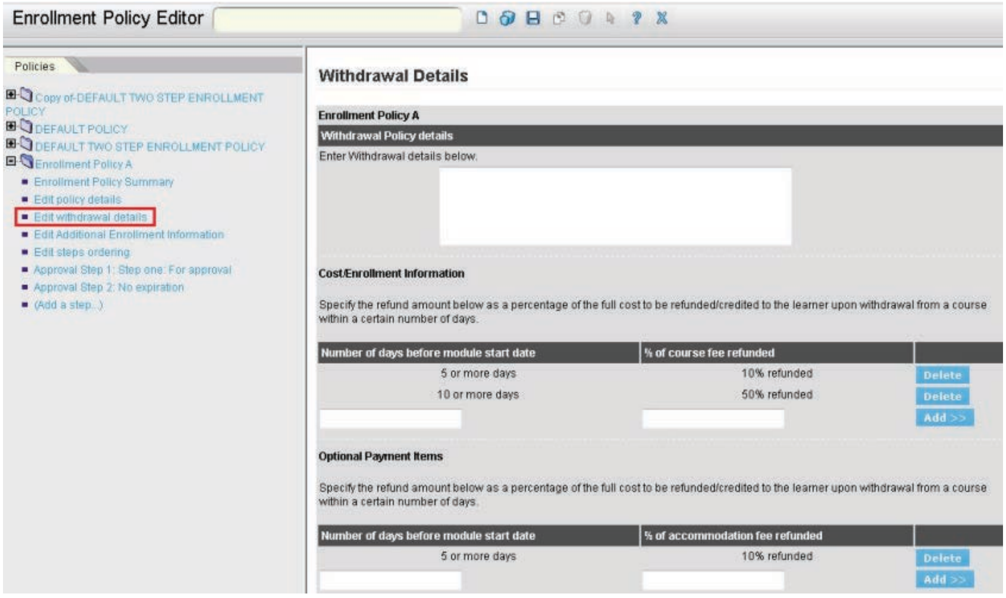


3. Check the **Prompt user for reason for the withdrawal** box.
4. Click **Save**.

Withdrawal Penalties

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

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

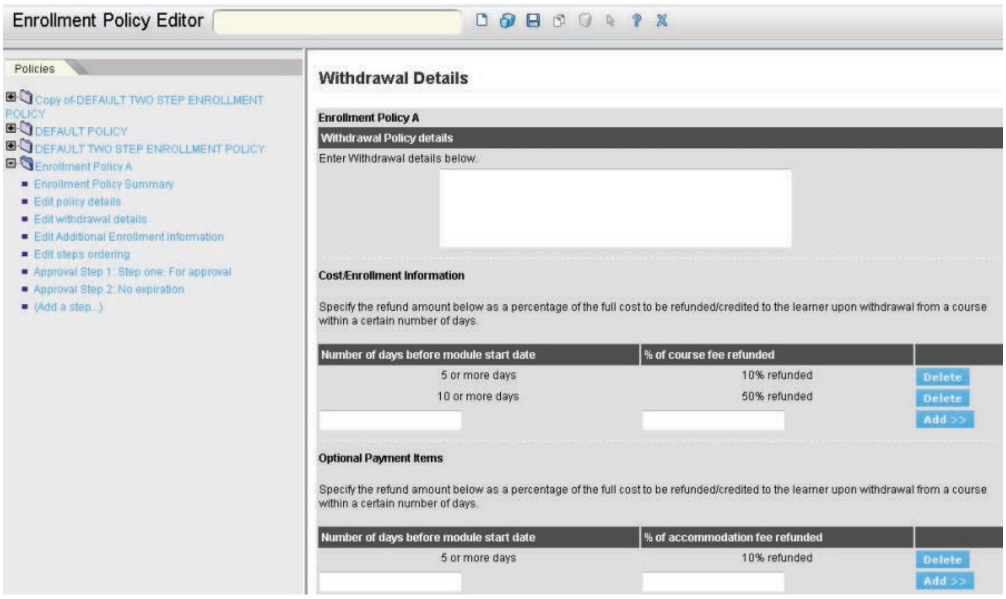


2.Enter the necessary details in the Enter Withdrawal details below field.

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

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

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

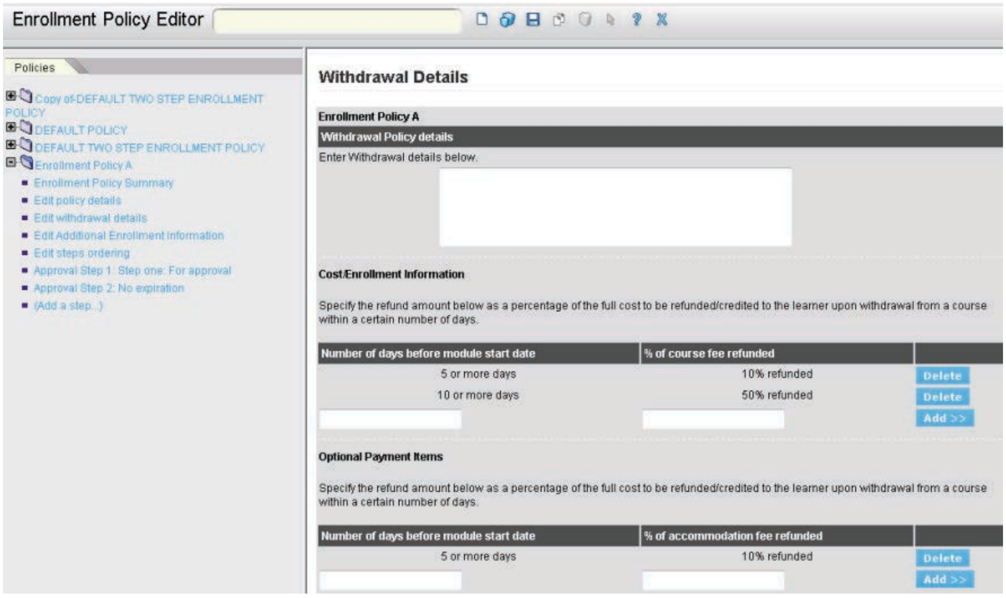


To add additional details, repeat steps 2, 3 and 4.

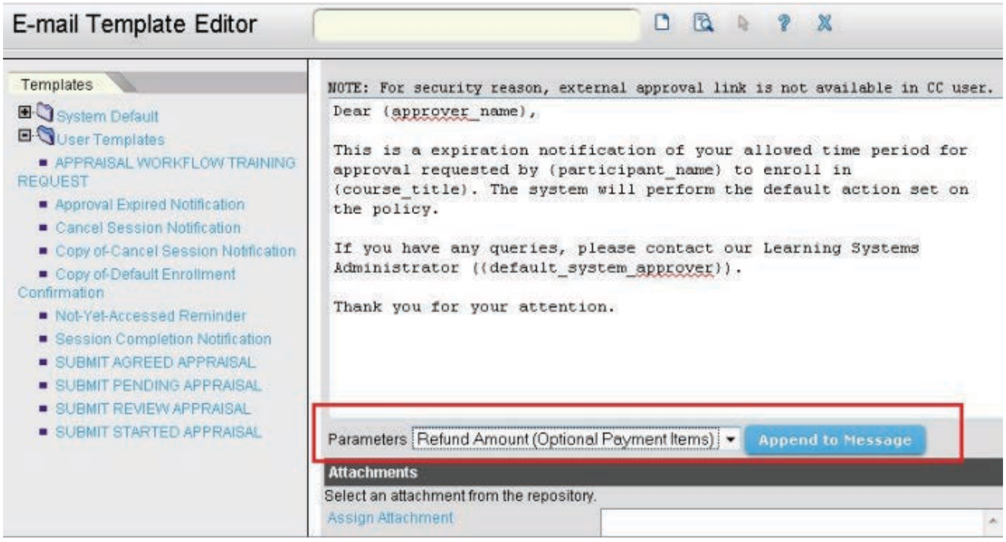
Withdrawal Policy for Optional Payment Items

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

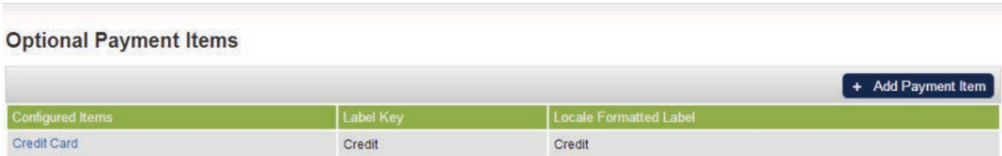
Withdrawal details for Cost/Enrollment and Optional Payment Items are separately defined. Items should be defined for Withdrawal Details on Optional Payment Items.



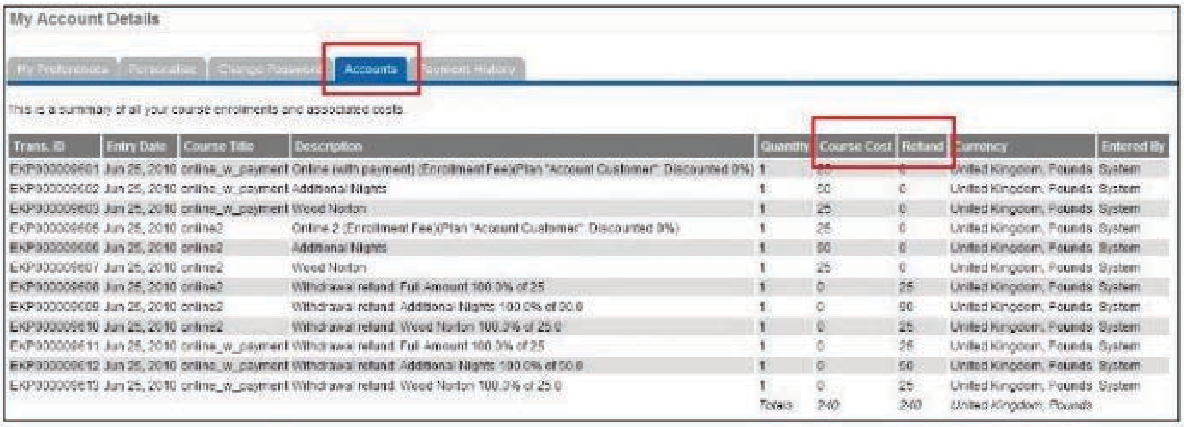
The parameter for the email template "**Refund Amount (Optional Payment Items)**" is available in *Em ail Template Editor*.



In Manage Center > Learning > Payment Manager > Optional Payment Items, you can add optional payment items for the courses.



Under the **Accounts** tab of **My Account Details**, Refund and Course Cost columns of the Optional Payment Items are also included.



Delete a Withdrawal Detail

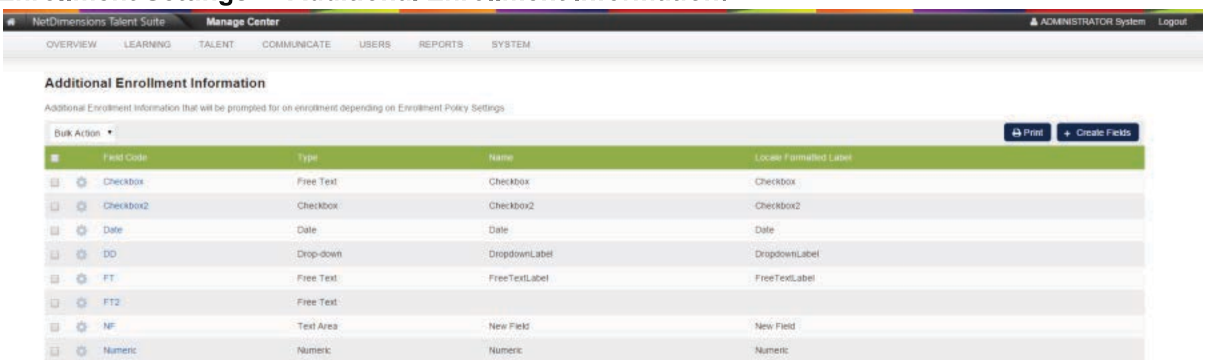
To delete a withdrawal detail, click the **Delete** button by the line item you wish to remove.

Configurable Additional Enrollment Information

It is common that on requesting for a course enrollment, additional information is to be requested from the user, for example, information required to make a reservation that relates to taking this course. The required additional information can come in various input formats. The current available fields are limited for usage in certain situations, flexibility can be further extended to accommodate capturing information of different input types thus introducing customized fields. Similar to other attribute types, an Additional Enrollment Information field supports the same set of data types to be presented to user to input the additional information at enrollment time.

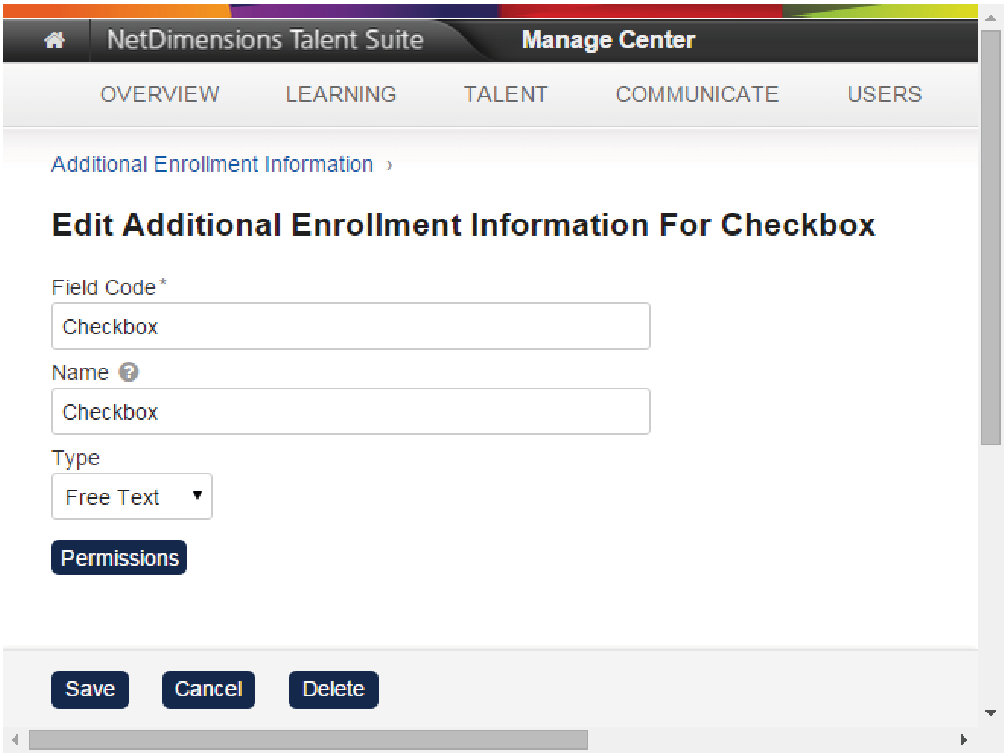
Configuration

A custom Additional Enrollment Information field can be set up by an Administrator via **Learning -> Enrollment Settings -> Additional Enrollment Information**.



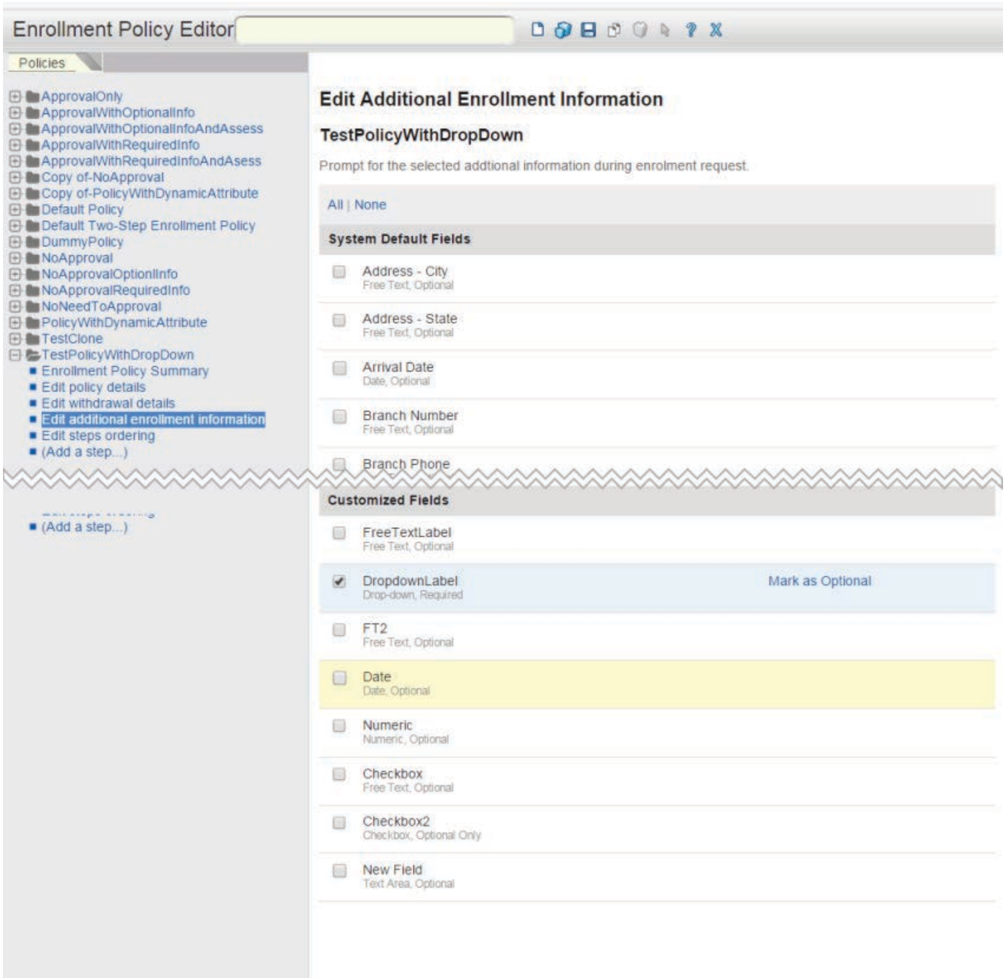
The following are the configurable properties of a custom Additional Enrollment Information field:

1. ***Field Code*** – A unique identifier
2. ***Name*** – The display name of the attribute. Language properties can be used here to display the attribute name in different languages.
3. ***Type*** – The format of the attribute. (Available types: Free Text, Date, Drop-down, Numeric, Checkbox)



Enrollment Policy Editor

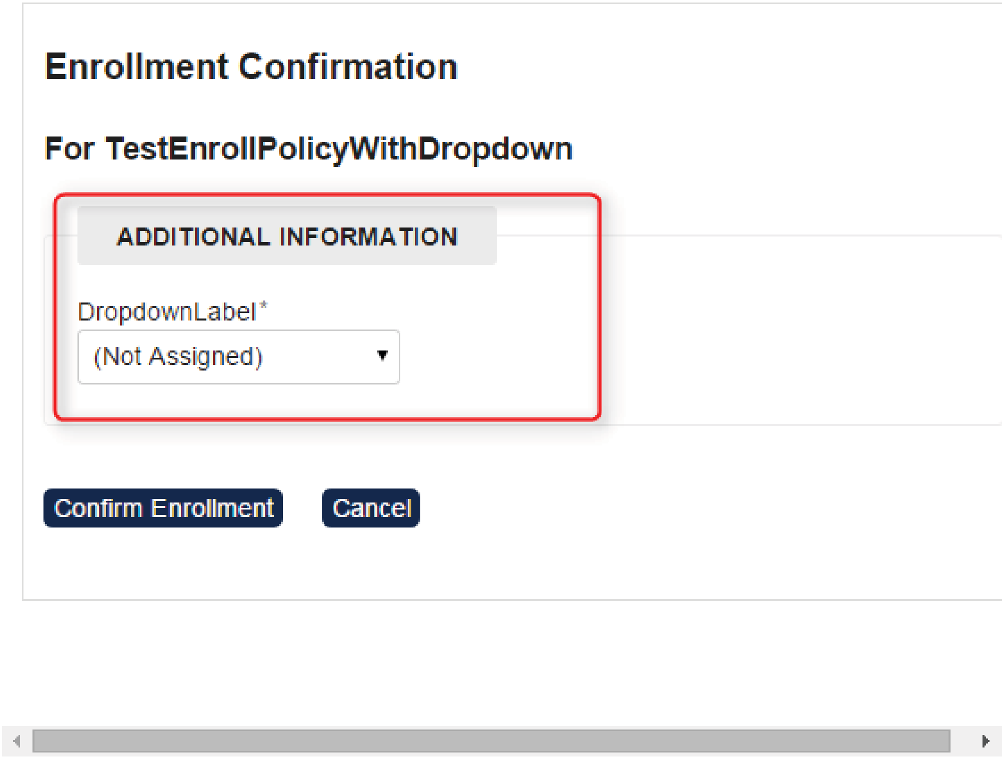
Configured Additional Enrollment Information fields will show up in the "***Edit additional enrollment information***" section in the enrollment policy. Note that the list is separated into two sections, one for displaying the previously supported fields as "System Default Fields" and another section showing the newly customized fields configured.



By selecting the checkbox beside the Additional Enrollment Information field, the selected Additional Enrollment Information field will be a required field to be filled in on enrollment. By default, an Additional Enrollment Information field is set to be optional, It can be toggled to be as required by selecting the "Mark as Required" action.

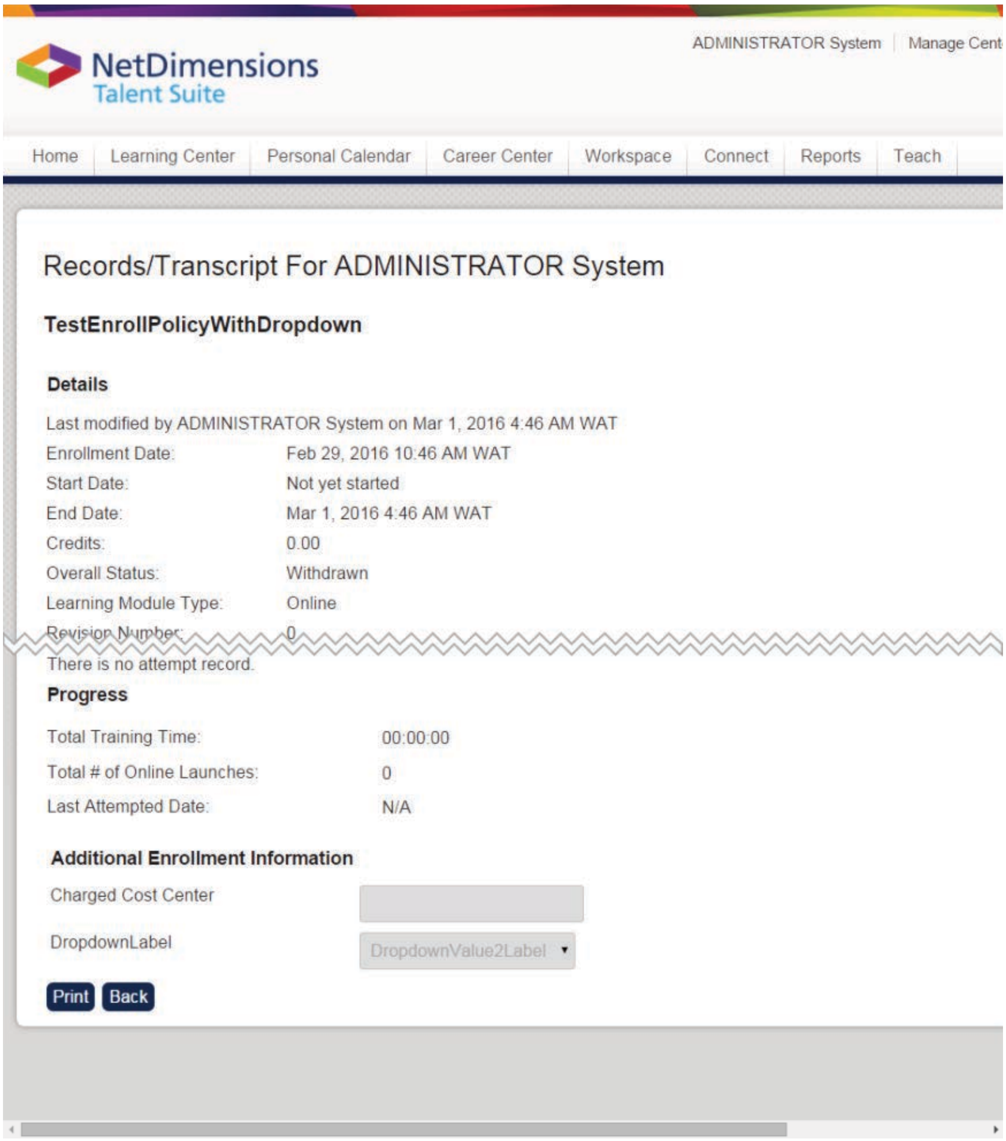
Enrollment

When a learner confirms the enrollment of the course, the configured Additional Enrollment Information fields will be presented for learner to enter.



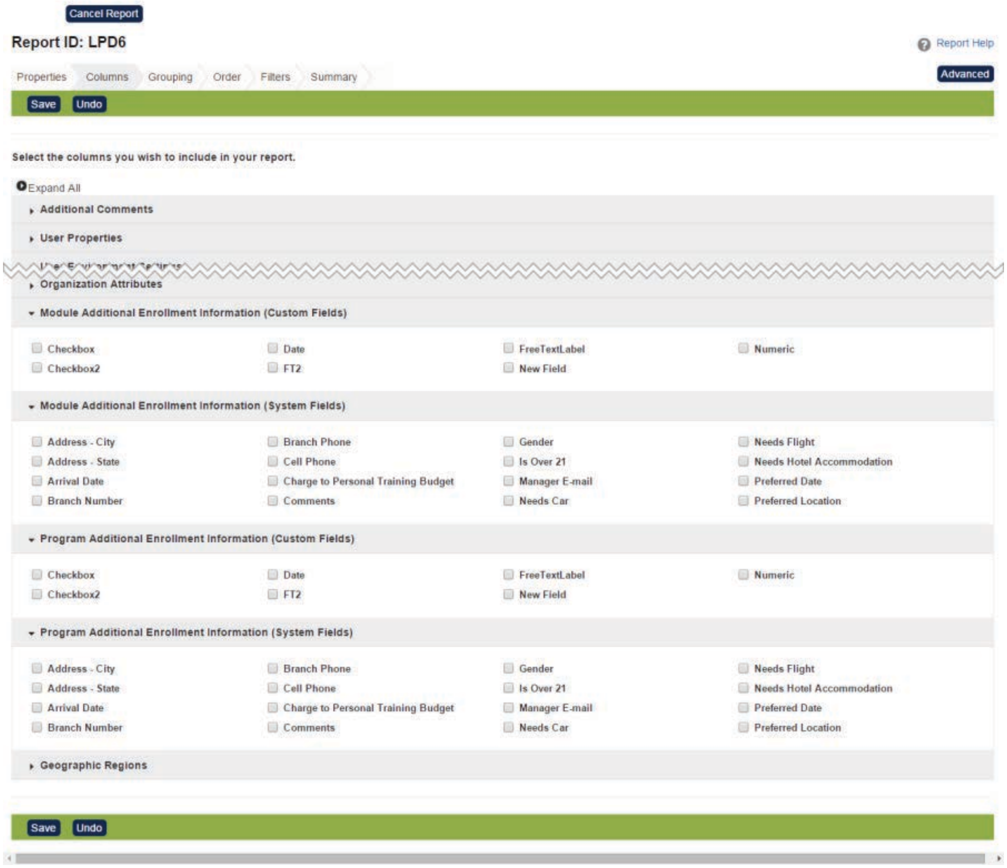
Transcript Details

The Additional Enrollment Information will be available for display in the bottom part of the transcript details if the System Configuration setting "Show additional enrollment information in records/transcript." is enabled.



Reporting on Additional Enrollment Information

Similar to other types of attribute fields, the Additional Enrollment Information fields are dynamically made available for selection to be reported in the Report Wizard. Note that because of the way different field types and different learning object types associated to a transcript record are stored, they are grouped into the 4 separate sections for selection as shown in the table below.



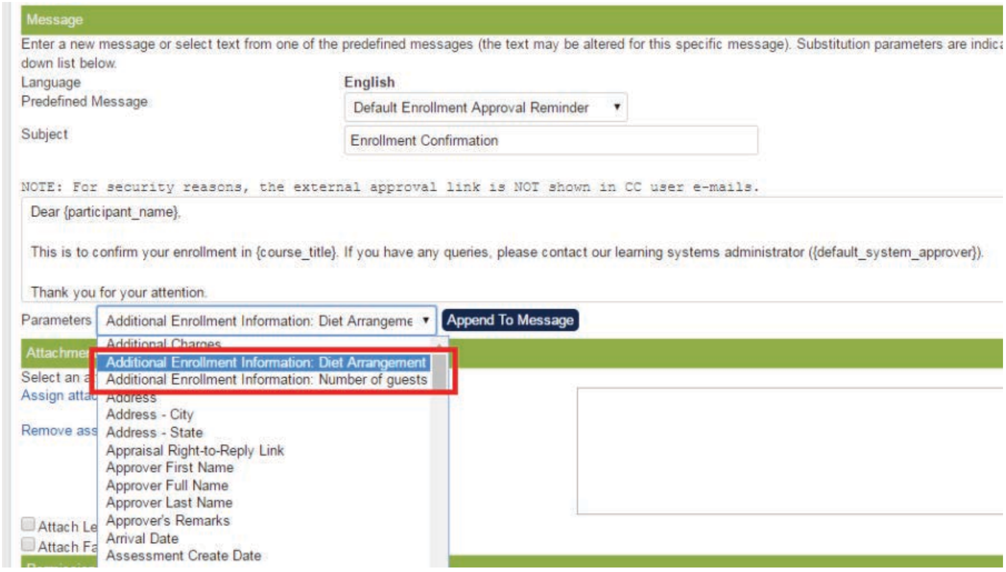
The table below lists the availability of each Additional Enrollment Information column group for the relevant report types:

Column Group	Available Report Type
Module Additional Enrollment information (Custom Fields)	1. Training History 2. Learning Program Detail
Module Additional Enrollment information (System Fields)	1. Training History 2. Learning Program Detail
Program Additional Enrollment information (System Fields)	1. Learning Program Detail
Program Additional Enrollment information (System Fields)	1. Learning Program Detail

Additional Enrollment Information as E-mail Parameters

Since Additional Enrollment Information fields are available, it would be useful to include the information entered by the user on registration in email notifications like the enrollment request email. Therefore, for both System Default and Customized ones, are made available as e-mail parameters, to allow e-mail templates to include the additional enrollment information where applicable. The existing System Default ones are included in the parameter selection list while the Customized ones are dynamically generated as well.

Customized Additional Enrollment Information attributes will be available in the parameters list with the prefix "***Additional Enrollment Information:*** ".



Below are the ***System Default Additional Enrollment Information Fields*** which are now available as E-mail parameters.

1. Address - City
2. Address - State
3. Arrival Date
4. Branch Number
5. Branch Phone
6. Cell Phone
7. Charge to personal training budget (Y/N)
8. Comments
9. Gender
10. Is Over 21
11. Manager E-mail
12. Needs Car
13. Needs Flight
14. Needs Hotel Accommodation (Y/N)
15. Preferred Date
16. Preferred Location

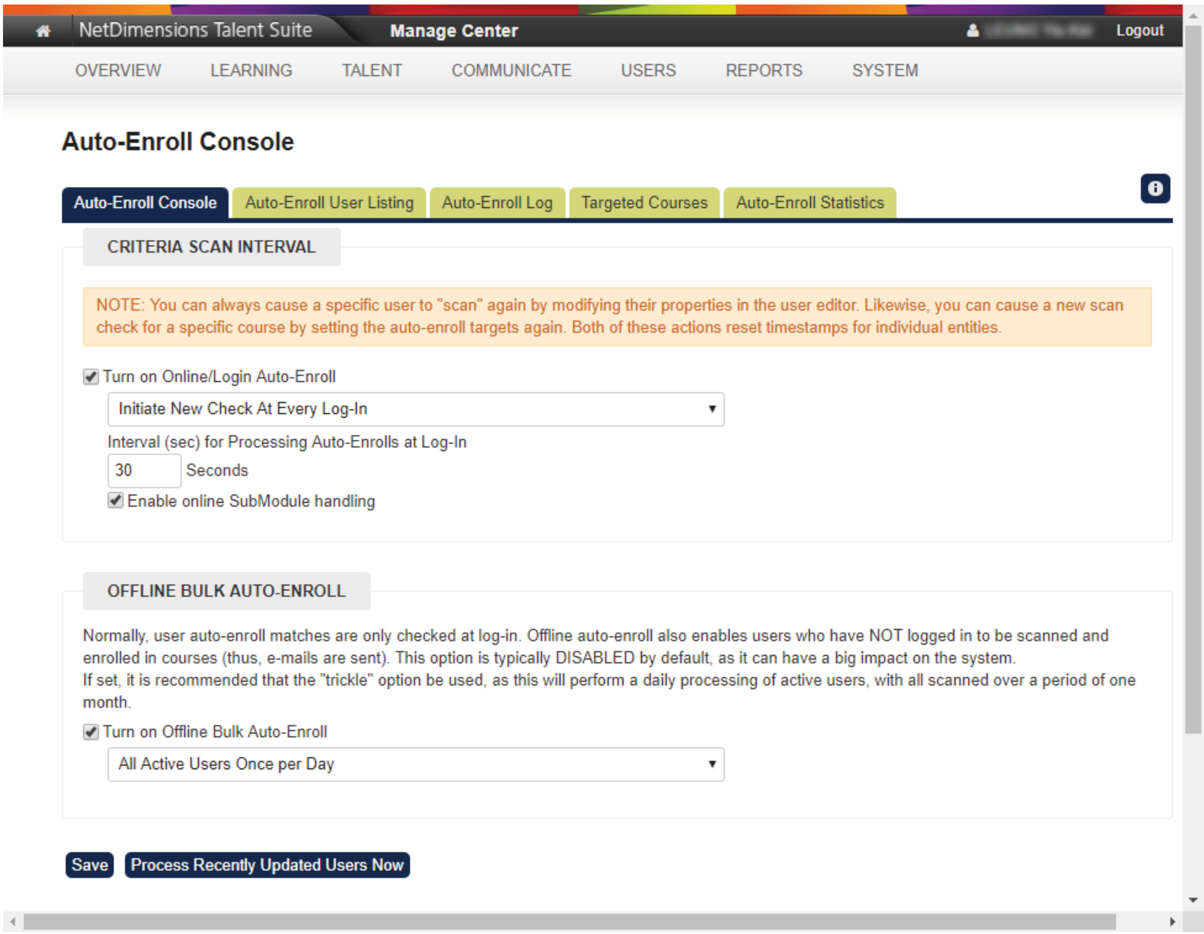
Additional Enrollment Information at Teach Participants

The Review Participants list via Teach gives an overview of the session being looked at that can assist with course administration. When looking at the enrollments of a particular session, it's helpful to see the additional enrollment information of the enrollment but this was only accessible if you click into the individual transcripts making it difficult to identify at a glance, for example, how many participants are vegetarian. Additional Enrollment Information fields can be added to the Review Participants table list as display columns for selection. They include both the System fields and Custom fields.

Auto-Enroll

Auto Enroll Console

Auto-Enroll refers to the mechanism by which learners are automatically enrolled onto certain training according to a set of criteria. The mechanism consists of periodic scans that will compare learners against auto-enroll criteria configured for courses, automatically enrolling them when they are a match. The Auto-Enroll Console allows you to adjust scan settings. To access, go to Manage Center > Learning > Enrollment Settings > Auto-Enroll Console.



Auto-enroll Console Tab

Turn on Online/Login Auto-Enroll

Enable to turn on online auto-enroll scanning. You can further specify when the scans should be conducted:

- Initiate New Check Only When Individual Module Criteria Or User Attributes Change
- Initiate New Check For Every Targeted Course At Every Login
- Initiate New Check For Every Targeted Course Each Week
- Initiate New Check For Every Targeted Course Each Month

Note: Changing this option will impact the "criteria check needed" timestamp of every course. You can always cause a specific user to "scan" again by modifying their properties in the user editor. Likewise, you can cause a new scan check for a specific course by setting the auto-enroll targets again. Both of these actions reset timestamps for individual entities.

Enable "**Enable online SubModule handling**" to also scan for auto-enrollments onto sub-modules as part of currently enrolled programs. If not enabled, this process will still run as part of the "Auto Enroll Offline Sub-module Scan" daily task (unless offline auto-enrollment is deactivated).

Turn on Offline Bulk Auto-Enroll

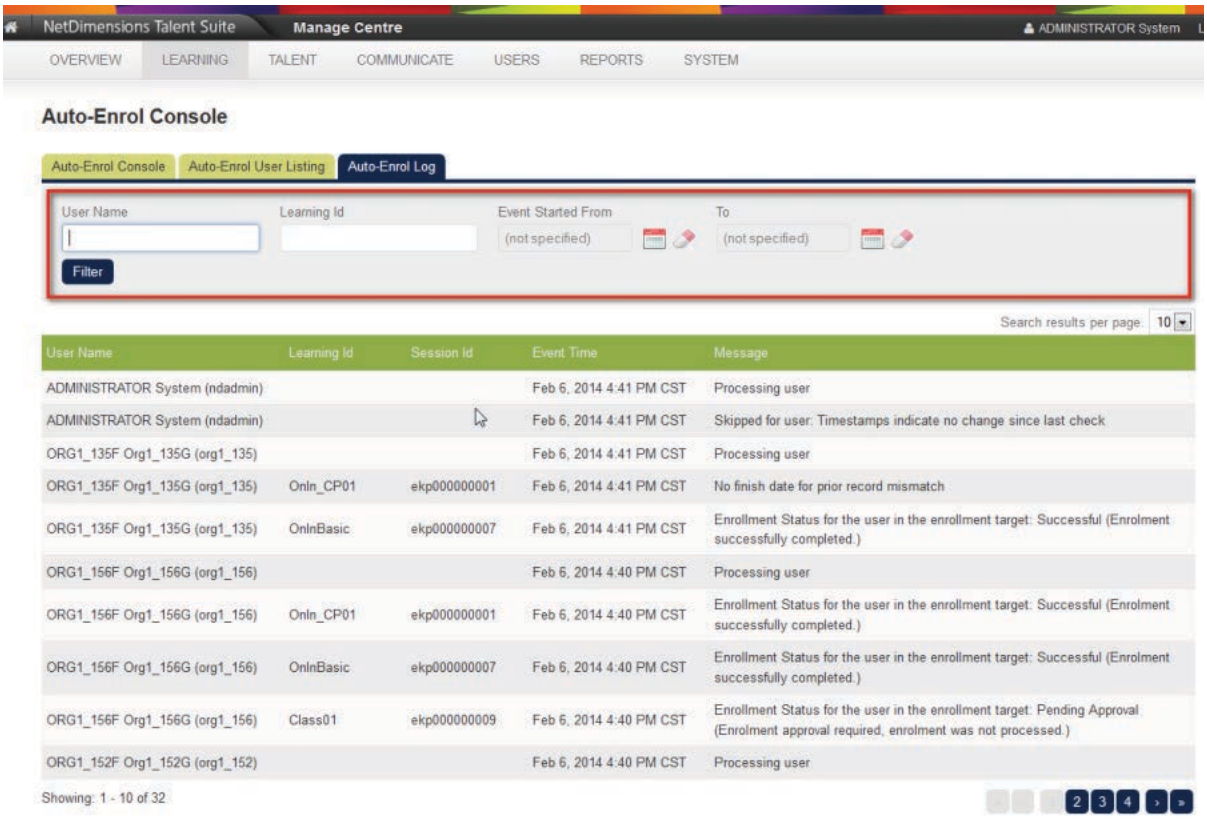
Offline auto-enroll will enable users who have NOT logged in to be scanned and enrolled in courses. Yo u can select one option from the following:

Option	Description

Daily Incremental	Process all active users which have been created or updated in the past 24 hours daily
Trickle Auto-enroll All Active Users Over One Month Period (Recommended)	Process roughly 1/30 of the active users in the next batch daily, wit h all scanned over a period of one month.
All Active Users Once per Day	Process all active users daily
All Active Users Once per Week	Process all active users weekly
All Active Users Once per Month	Process all active users monthly

Auto-Enroll Log Tab

The auto-enroll log page allows administrative users to view the log. You can filter the logged entries by User Name, Learning ID, Event Started From or to.

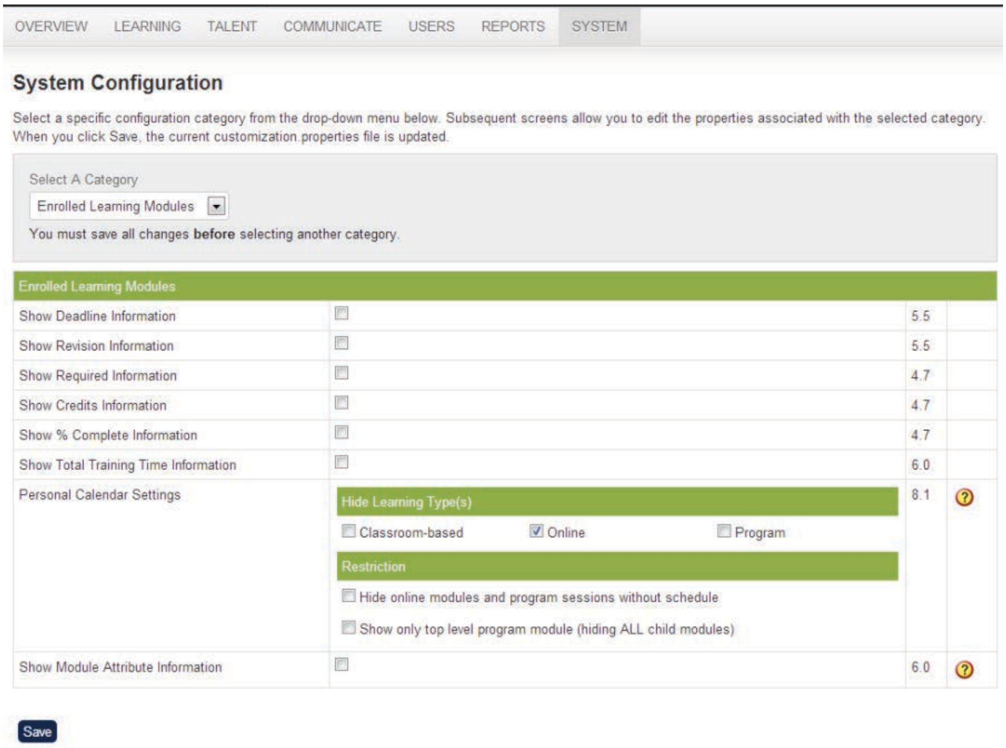


Note: Log entries older than 30 days will be purged by the system automatically.

Prerequisites in Auto-Enroll

Automatic enrollment rules can be configured to establish paths of learning such that all prerequisites must be satisfied before auto enroll rules take effect. To do so:

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



2.In the Select a category field, select 'General' from the drop down list.

3.Disable the Ignore prerequisites for automatic enrollments property.