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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

Document Information

Document ID: EN15010 Document Title: NetDimensions LMS 15.1 - Catalog Administration Document Version: 1.0 Document Date: January 2020

This document may be revised from time to time.

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Website: www.peoplefluent.com

Email: support@peoplefluent.com

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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.

⑦ Catalog Configuration Help

Title:			
Reference Code:			٦
Comments:			
			.41
Responsible Party:			
Catalog Display Format:	Format 3 - Catalog Picture, Course Text	•	
Picture:		k 💟	
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.

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

② Catalog Configuration Help

Title:	Communication Skills	
Reference Code:	001	
Comments:		
Responsible Party:		
Catalog Display Format:	Format 3 - Catalog Picture, Course Text 🗸	
Picture:		0
Created by:	MOLINA Alon (ALON)	
Date Created:	Sep 25, 2013	
Permissions:	Permissions	
	Additionally, grant permissions as defined in parent	

Allow users to access the catalog without logging in

Save Cancel

- 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.

1		
Course ID Generator Format	MOD-0000	6.1 🧑
Enable Catalog Assignment at the User Level		6.3 🥝
2		

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

Use the checkbox to select content for removal from this catalog.	
Online 2 with Payment (O2wP)	
Save Cancel	

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.

Clone Catalog		:
Source:	Communication Skills	
Target:		Q
Include course content?	\checkmark	
Keep existing permissions?	\checkmark	
"Additionally, grant permissions as defined in	As defined in original	
parent" checkbox for resultant catalogs should be	ODisabled	
	O Enabled	

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.

Move Catalog		×
Source:	aaaa	
Target:		
Include course content?		
Keep existing permissions?	\checkmark	
"Additionally, grant permissions as defined in	As defined in original	
should be	Obisabled	
	○ Enabled	
Save		
		1.

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

3		
Keywords:	Search Advanced Search Search Help	Results per page: 25
Showing: 1 - 5 of 5		
English 101 Learning Type: Classroom In catalog(s): Default Public Catalog Sample		
ENGLISH 101 - A Learning Type: Online In catalog(s): Default Public Catalog ENGLISH 101 - A		
Human Computer Interface Guidelines Learning Type: Online In catalog(s): Default Public Catalog		
Maritime Navigation Learning Type: Online In catalog(s): Default Public Catalog Basic instruction on U.S. Coast Guard and U.S. R	egulation of Inland Vessel Rules of Navigation	
and Alafa		

• 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)

Learning Module Search

Keywo	rds:	Search Advance Search H	d Search Help	ł	Results per pa	ge: 25 💌
Showing	: 1 - 6 of 6					
Туре	Learning Module/Program	Catalog	Price	Relevance 🔺	Vendor	Rating
-	English 101	Default Public Catalog	USD 0.00	100%	Unknown	N/A
0	ENGLISH 101 - A	Default Public Catalog	USD 0.00	100%	Unknown	N/A
0	English 102	Default Public Catalog	USD 0.00	100%	Unknown	N/A
0	Human Computer Interface Guidelines	Default Public Catalog	USD 10.00	100%	Unknown	N/A
0	Maritime Navigation	Default Public Catalog	USD 0.00	100%	Unknown	N/A
0	no title	Default Public Catalog	USD 0.00	100%	Unknown	N/A
-	1 5 15					

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

	e Search	Search Advanced Search	Results per page: 25
owing: 1 - 6 of 6		Search Help	
		Samala	
	English 101 Classroom	Gampie	
2	Default Public Catalog		
	ENGLISH 101 - A	ENGLISH 101 - A	
0	Online		
1	Default Public Catalog		
	English 102	English 102 - Sample	
	Outing		

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

(eywords:		Search	Advanced Search Search Help	Result	s per page: 25 [
howing: 1	6 of 6			-	Deter
Type	Learning Module/Program		Pho	Vendor	Rating
8	English 101		USD 0.01) Unknown	N/A
9	ENGLISH 101 - A		USD 0.00) Unknown	N/A
0	English 102		USD 0.00) Unknown	N/A
	Concerning and the second s		USD 10.0	Unknown	N/A
	Human Computer Interface Guidelines				
9	Human Computer Interface Guidelines Maritime Navigation		USD 0.00	Unknown	N/A

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.

carring would be dealer		
Keywords:	Search Advanced S Search Help	earch Results per page: 25 💌
howing: 1 - 6 of 6		
English 1 Learning Type: Online Learning(a): Default Dublic Catalog		
Enroll and Launch		
English 2		
Learning Type. Online		
Learning Type: Online In catalog(s): Default Public Catalog Enroll and Launch		
Learning Type: Online In catalog(s): Default Public Catalog Enroll and Launch Math 3 Learning Type: Online In catalog(s): Default Public Catalog		

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.

Peop	leFluent							HO Sara Manage Cent	er Help Contact Us	Logout
Home	Learning Center	Personal Calendar	Career Center	Workspace	Connects	Reports	Teach			Q
Learning N	Module Search									
Search a Moo advanced +I	dule Show Tips	Searc	h Case-sensitiv	e 🕜						
Refine By			Search Results	for "advanced	+linux"				Results per Page:	200 •
Location All All Industrial Ski Rob's training Type All Classroom (8 Region All All	lls Center (7) g centre (1) ;)		Showing: 1 - 1 of 1 Advanced Linux A Jan 23, 2023 9:00 / C Learning Type: Clas In catalog(s): GALA Classroom course of Showing: 1 - 1 of 1	dministration (CRM, M - Jan 27, 2023 8 isroom XY_IT_CATALOG in advanced Linux	ADVLXADMIN) 00 PM HKT administration.					
Show only "	Active" sessions									

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.

```
Web Catalogs
```

We	b Catalogs	Cours	ses		
				¢ Refresh All +	Add Web catalog
	Name		Endpoint	Last Update	Courses
٥	[!] ESL		http://netdows.skillwsa.com/olsa/services/Olsa	9/12/13 6:02 PM	672

• Click the Add Web Catalog. The Add Web Catalog tab screen appears.

Web Catalogs >

Add Web catalog

Name
Endpoint
Customer ID
Shared Secret
□ Include OLSA Search and Learn categories in Universal Search
🖬 Save 🕻 🕤 Cancel

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.

Web Catalogs

Wel	Catalogs Cour	ses		
			ф Refresh All 🕇 + 🗸	Add Web catalog
	Name 🔺	Endpoint	Last Update	Courses
٥	[I] ESL	http://netdows.skillwsa.com/olsa/services/Olsa	9/12/13 6:02 PM	672

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.

Ne	b Catalo	ogs			
We	b Catalogs	Cours	ses		
				Ø Refresh All	+ Add Web catalog
	Name		Endpoint	Last Update	Courses
٥	[I] ESL		http://netdows.skillwsa.com/olsa/services/Olsa	9/12/13 6:02 PM	672
Edit Ref Del	t iresh ete missions				

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.

Web Catalogs Courses Image: Course state of the state o

This opens Web Catalog Editing screen.

W/al		tal	0.00	
vvei	u Ca	ιa	ogs	>
			_	

Web Catalog Properties

Name
ESL
Endpoint
http://netdows.skillwsa.com/olsa/services/Olsa
Customer ID
spnetdows
Shared Secret
•••••
Include OLSA Search and Learn categories in Universal Search
🖬 Save 🕻 😽 Cancel Permissions

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.

OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
OTLITTETT		17 1000111	Common and	UULITO	THE OTHER	UTUTE.	
Web Catalogs >							
Web Catal	og Propertie	es					
Name							
Skillsoft catalog	js						
Endpoint							
http://Skillsoft.co	om/catalog						
Customer ID							
user							
Shared Secret							
Include OLSA	Search and Learn	categories in l	Jniversal Search				
Add synchroniz	ed courses to	A. 150 Date:					
Skillsoft-define	d catalog structure	e under this par	ent catalog:				
Catalog synchro	onization handlin	a for existing	courses:				
Use existing	catalog assignmen	t(s) 😡					
		Desertation					
B Save	5 Cancel	Permissions					

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).

Catalog synchronization handling for existing courses: Use existing catalog assignment(s)

Pe



If 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 disabled, the course would be assigned with the selected catalog assignment handling in additon 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.

NetDimens	ions	1
Talent Suite		
he Learning Center	Career Center Workspace Connect Reports Teach	
earch		
caron		
Learning Module	Keywords: guide P Search	
Job Aids (Skillsoft)		
Skill Briefs (Skillsoft)	Learning Module	
Test Preparation (Skillsoft)	Leadership KnowledgeCenter Guide	
Books (Skillsoft)	In catalog(s): Default Public Catalog Details of the content contained in the Leadership KnowledgeCenter	
Reference Resources (Skillsoft)	Six Sigma KnowledgeCenter Guide	
	In catalog(s): Default Public Catalog Details of the content contained in the Six Sigma KnowledgeCenter	
	Manager's Performance Guide - Team Conflict Skills	
	Learning Type: Online In catalog(s): Default Public Catalog	
	There is little doubt that today's organizations are experiencing unprecedented changes in how and accomplish their work. Nowhere are these changes more evident than in organiz.	/ they define themselves
	e a a	More Results
	Job Aids (Skillsoft)	
	Guides to Lean Concepts and Principles	
	Use this job aid to review Lean's basic principles and concepts. Vendor: skillsoft	
	Project Activity Relationships	

To enable, setup a web catalog account in **Manage Center > Learning > Web Catalogs** and enable "I **nclude 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.

NetDimension	s Talent Suite	Man	age Center			📤 ADMINIS	TRATOR Syste
OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
Web Catalogs >							
Web Catalog	Properties	6					
Name	Catalan Cu						
olsatesta	Catalog Sy	nenronizatio	1				
Endpoint	Synchroni	ze "olsatest	a" to "Ground Cont	rol"			
http://netdows.skill	w: 🛕 Catalog	g Synchroniza	tion can not be undone.				
Customer ID	Press "Ever	ute" to start s	vnchronizing or "lanor	" synchronizat	ion to save all the		
spnetdows	other change	es.	ynenionizing, or ignore	s synchronizat	ion to save an the		
Shared Secret						_	
•••••	Execute	Ignore					
Include OLSA Se	earch and Learn o	ategories in U	niversal Search				
Add synchronized	courses to						
Skillsoft-defined c	atalog structure (under this pare	nt catalog: Ground Cor	ntrol 💼			
Ihis specific cata	log: ration handling	for ovisting	CUITE OF				
Use existing cata	alog assignment(s) 🔞	.001365.				
-							
B Save to C	ancel Permis	sions					

Setting the Permission of the Web Catalog

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

Web Catalogs

We	b Catalogs	Cour	ses		
				Ø Refresh All	+ Add Web catalog
	Name		Endpoint	Last Update	Courses
٥	[I] ESL		http://netdows.skillwsa.com/olsa/services/Olsa	9/12/13 6:02 PM	672
Edit Refr Dele Perr	t resh ete missions				

Or insider the Web Catalog Properties.

Web Catalogs >

Web Catalog Properties

Name
ESL
Endpoint
http://netdows.skillwsa.com/olsa/services/Olsa
Customer ID
spnetdows
Shared Secret
•••••
✓ Include OLSA Search and Learn categories in Universal Search
🖬 Save 🗖 🕤 Cancel Permissions

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.

Categories

			+ Create Category
٥	Communication		
Edit	t Category	ју	
Del Per	ete Category missions		

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.

Net	tDimensio	ns Talent Suite	Mar	age Centre				🛔 Katrina Sapiala 🛛 Lo
OVE	RVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
Sub	jects							
								+ Create Subject
		st Maintenance						
٥	Accountin	9						
٥	Anti Mone	y Laundering						
٥	Automotiv	0						
•	Aviation							
•	Competen	icy						
*	complianc	P						

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**.

			-						
Ne	tDimensior	ns Talent Suite	Man	age Centre				👗 Katrina Saplala	Logo
OVI	ERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM		
Geo	ographie	c Regions							
								+ Create Geographic Region	
	Code 3						ime 🕖		
0	Germany								
•	India								
•	Manchest	er							
•	Nigeria								
•	Poland								
•	Portugal								
Ф	Russia								
•	Sahara								

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:

Learning Type:	All	*			<< Aug	ust 🔹 >> 2011 👻 Today	
Area: Audience:	All						
S	M	Т	w	T	F	S	
31	Aug 1	2	3	4	5	6	
7	8	9	10	11	12	13	
14	15	16 • How To Boil an Egg	17	18	19	20	
21	22	23	24	25	26	27	
28	29	30	31	Sep 1	2	3	

Course Calendar

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.

Catalogue Editor - Google Chrome	and the second se	3 A	
europe-perform.netdimensions.com/	europe/servlet/ekp/BSCA	TFRAMES?LID=m016	
Catalogue Editor		0080	0 X
Session Properties Module Properties	Module Propertie	s	
3 routes to good communication (m016)	3 routes to good com	munication (m016)	
	Learning Module Details		
Catalogue Setup 11 Define Module Properties 12 Enter Cost Information 1.3 Enter Objectives 1.4 Enter References 1.5 Preview 1.6 View Usage Statistics 1.7 Indicated Interest List 1.8 Associated Programmes Listing 1.9 Revisions 1.10 Virtual Archive	The following information i specifying the course des panel Module ID: Title:	s used to classify the cou cription and other course o m016 3 routes to good commu	rse entry within the catalogue. Additional screens for details may be displayed by clicking one of the links on the left unication
Access Control/Enrolment Control 2.1 Define Module Security 2.2 Assign Prerequisites 2.3 Assign Recommended Course(s) 2.4 Assign Exam/Certification/Evaluation 2.5 Define Enrolment Policy	Description:	k	
Knowledge Centre Setup 3.1 Setup Options	Language Vendor	English • Unknown	1
4 Launch Setup 4.1 Define Launch Properties 4.2 Preview 4.3 Proxied Launch Package	Duration Comments: Support Contact: Display "Indicate Inter Show on Other Resou Require e-Signatures Catalogue Configuration Each learning object can a Visibility:	AICC Company CourseCreator Elekta Hart, Andrea Internal Knowledge Products Learning Tree NetDimensions SkillSoft Todd Winge	es tab (tabbed interface only) gres, depending upon the options set below.
	Category:	Unyleya	
	Subject:	Unassigned	

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

Ne	tDimensio	ons Talent Suite	Man	age Centre				🛔 Katrina Saplala	Logout
ov	ERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM		
Ver	ndors								
	Vendor							+ Create Vi	endor
0	AICC								
•	Company								
•	CourseCr	eator							
•	Elekta								
*	Had And	100							

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.

Catalogue Editor)	0 0 8 0 X				
Module Properties Bession Properties 1.1 - Kick-off-Veranstaltung (SEW_1.1) Select an event status	-	Edit the	extra cost associated	with this se 014 09:00 - 19-F	ssion =eb-2014 17:00)		
Active		Dase Curren	Cy of this session. Conted King	Contraster Date			
Select a session:		Accounting				(E)0 Rate Cutte	and a second
1. Termin, 18-Feb-2014 09:00 (DriveAcademy)	•	Category					alert.
60 D 0 0		Add or remov	ve addition costing information of	this session	United Kingdom, Pounds	. 1	Add >>
Session Satup - the following steps help you to define 1 Edit Session Class Schedule 3 Eriter Cast Information 4 Participants 5 Instructors 6 E-mail Publicances Satup 9 Course Courson 8 View Usage Statistics 9 Course Courson 10 Resource Reservation	a session.						

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**.

Ne	etDimensio	ons Talent Suite	Man	age Centre				🛔 Katrina Saplala	Logout
ov	/ERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM		
Co	st Acco	unting Cate	gories						
							+ Creat	e Cost Accounting Cate	egory
			st Maintenanc						
•	Catering								
0	default								
•	Hotel								
•	Mobile Un	iit							
0	Trainer								

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:

Catalogue Editor			X			
Session Properties Module Properties Communication I (Comm_P_1)	Chat Room:					
1 Catalogue Setup ◆ 1.1 Define Module Properties 1.2 Enter Cost Information 1.3 Enter Objectives 1.4 Enter References 1.5 Preview 1.6 View Usage Statistics 1.7 Indicated Interest List 1.8 Associated Programmes Listing 1.9 Virtual Archive 2 Access Control/Enrolment Control	Optional Module Attribut Optional module attribut CPDTopic CPDHours TargetAudience New_module_attribute PC needed? Format	te(s) es. if configured, may be assigned if (Not Assigned) • (Not Assigned) • (Not Assigned) •	to this module.			
2.1 Define Module Security 2.2 Assign Prerequisites 2.3 Assign Recommended Course(s)						

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

Manage	e Ce	enter							🛔 HO Sara 🛛 L
Overview		Learning	Talent	Communicate	Users	Reports	System		
Module	At	tribute C	ategorie	es					
Bulk Action	n •								Print + Create New Module Attribute
		Attribute Co	ode	T	уре	Name		Locale Formatted Label	Display areas
• •	8	RESUX1		с	heckbox	Residential (UX	1)	Residential (UX1)	Records/Transcript Print Records/Transcript Report Enrolled Learning Modules
•	*	commonID		D	rop-down	ID		ID	Records/Transcript Print Records/Transcript Report Course Description Enrolled Learning Modules Knowledge Center
• •	>	REQD		с	heckbox	msg.required		Required	Records/Transcript Print Records/Transcript Report Course Description Enrolled Learning Modules Teach
									Records/Transcript Print Records/Transcript Report

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:

OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM
Module Attribute	Categories >					
Module Att	tribute:					
Attribute Code:	2					
Label Key:						
Туре:	Free Text [🔹 🗌 Sum t	otal when printing or	reporting 🕜		
Display Areas:	Records/	Transcript 🗵	Print Records/Trans	script Report	Course Des	cription 🔲 Enrolled Learning Modules
Permissions	Add					

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:

Module Attribute C	ategories >
Module Attr	ibute: Test01
Attribute Code:	Test01
Label Key:	Test
Туре:	Free Text V Sum total when printing or reporting
Display areas:	Records/Transcript Print Records/Transcript Report Course Description Enrolled Learning Modules
Permissions U	bdate Delete

- 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.

Report ID: test	? Report Help
Properties Columns Grouping Order Filters Summary	Advanced
Save Undo	
Select the columns you wish to include in your report.	
Expand All Dynamic Module Attributes	
test Dynamic Session Attributes	
session_attr_2	
Optional Module Attribute(s)	
Extra Module Module Attribute Value Categories	
Instructor Information	

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:

Module Attribute Categories >

Module Attribute Cdoe1	
Name 😧	
Module Attribute Name1	
Туре	
Free Text	
Sum total when printing or reporting	
Display areas	
Records/Transcript	
Print Records/Transcript Report	
Course Description	
Enrolled Learning Modules	
Knowledge Center	
Learning Module Manager	
Learning Module/Session Selectors	
Permissions	
Permissions	
Permissions	

2.Module Attributes as Selector Filters

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

orm a search to generate a	list of items in the "Available	e Choices" pane	el. Select one of the item	is listed, and	click the single arrow (e	e.g., >) button to copy
search result list only displa	aug the first 1 000 source	we all items bet	ween the panels, when	you have con	inpiered your selection, t	LICK THE OK DUILDH.
search result is displayed in	n the format: Title (ID), Sess	sion.				
Horizontal display						
learch text.	Catalog		Learning Types	_	Session Status	
	All	•	All		(not specified)	
odule Attribute Name1						
Filter						
lable Choices						
lable Choices						
lable Choices						
lable Choices						
lable Choices						
lable Choices						
lable Choices						
lable Choices						
lable Choices						
lable Choices						
ilable Choices						
lable Choices						
lable Choices						
lable Choices cords Retrieved: 0 cords Retrieved: 0						
lable Choices cords Retrieved: 0						
lable Choices						
lable Choices						
lable Choices						
lable Choices						
lable Choices cords Retrieved: 0 v A R						
lable Choices						

3.Module Attributes as Manage > Learning Modules Filters

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

Attribute Code*			
Module Attribute Cdoe	1		
Name 😧			
Module Attribute Name	1		
Туре			
Free Text -			
Sum total when print	ing or reporting		
Display areas			
Records/Transcript			
Print Records/Transo	ript Report		
Course Description			
Enrolled Learning Mo	dules		
Knowledge Center	1.0.0	-	
Learning Module Mar	nager		
Learning Module/Sea	sion Selectors	12	
Permissions			

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

HDE FILTERS Preset Filters [Manage] Module Title/ID/Description Type Category I I All Image Subject Status Catalog All Image Catalog All Image Image Vendor Language Created Between All Select a Language Date Created by Last Modified By Search for a user Image Created by Last Modified By Search for a user Image Test TestNumeric Number (No Selection) Filter Reset Sove As Preset					
Preset Filters [Manage] Module Title/ID/Description Type Category All All Subject Status Catalog All Ølnclude sub-catalogs? All Ølate Search for a user Test TestCheckbox Filter Reset Save As Preset		HIDE	FILTERS		
All	anage] Module	ule Title/ID/Description Type	Ca	ategory	_
ubject Status Catalog All Active Only Created Between And Language Created Between And All Select a Language Date Date reated by Last Modified By Module Attribute Name1 Test Search for a USer Control Search for a USer Control (No Selection) Control		All	• A	411	
All Ali Active Only Created Between And Date Date Date Date Date Date Created by Last Modified By Module Attribute Name1 Test Constant of a user Constant of	Status	us Catalog			
andor Language Created Between And All Select a Language Created Between And Date Date Module Attribute Name1 Test isarch for a user Control (No Selection) C	Active	ive Only		Include sub-catalogs?	
All Select a Language Last Modified By Last Modified By Module Attribute Name1 Test (No Selection) Search for a user TestDropDown Number (No Selection) TestCheckbox Ret Reset Save As Preset Re	Languag	uage Created E	Between An	1d	6
eated by Last Modified By Module Attribute Name1 Test earch for a user st TestNumeric TestDropDown Number (No Selection) Filter Reset Sove As Preset	Select	ect a Language		Jate	3
earch fot a user Search for a user (No Selection) st TestNumeric TestDropDown Number (No Selection) Filter Reset Save As Preset	Last Mo	Modified By Module A	ttribute Name1 Tes	st	-
st TestNumeric TestDropDown Number (No Selection) TestCheckbox	search	ch for a user	(1)	to Selection)	1
Number (No Selection) Filter Reset Save As Preset	TestNum	lumeric TestDropE	Jown		
Filter Reset Save As Preset	Number	iber (No Sele	iction)	TestCheckbox	
Re	set Save As Preset				
Re					
					Results per Page:
k Action Customize Columns + Cr				Customize Columns	+ Create Learning Mo
Module Title (ID) A Type Created On					

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

	Status	Catalog		_
•	Save as Preset		х	:
•	Preset Name			
	Required		J	
user	Properties			
	Module Title/ID /Description:			
Reset Save As	Туре:	All		
	Catalog:			
	Include sub-catalogs?:	Yes		Results ner Pa
	Category:	All		itesuits per l'a
	Subject:	All		ns 📘 🕂 Create Learnin
odule Title (ID)	Status:	Active Only		reated On
	Vendor:	All		
CC Flash Workshop -	Language:	Select a Language		JI 30, 2013 11:48 AM by
	Created Between:			DMINISTRATOR System
CC SAMPLE AUTHOR	And:			ul 30, 2013 11:48 AM by
AMPLE-COURSE-1)	Created by:			DMINISTRATOR System
++ (T2)	Last Modified By:		_	lar 30, 2015 4:34 PM by
(12)	Module Attribute Name1:			DMINISTRATOR System
JRO - Receipt of Com	Test:	(No Selection)		ug 13, 2013 3:19 PM by
URO_Receipt_of_Con	Test:			DMINISTRATOR System
	TestNumeric:			in 11 2013 4:11 PM by
assroom1 (MOD-0012	TestDropDown:	(No Selection)		DMINISTRATOR System
	TestCheckbox:			1 10, 0012 11,21 AM b.
assroom2 (MOD-0015			-	DMINISTRATOR System
assroom3 (MOD-0023	Save Close			ug 8, 2013 2:47 PM by DMINISTRATOR System
		П		Nov 20 2012 2-22 DM by

Session Attributes

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

Overview	Learning Talent Communicate	Users Rep	orts System		
Session	Attribute Categories				
Bulk Actio	n 🔻			🕀 Print	+ Create Session Attribute
	Attribute Code	Туре	Name	Locale Formatted Label	Mandatory
•	dadv_Venue_Category	Free Text	dadv_Venue_Category	dadv_Venue_Category	Yes
•	R	Checkbox	Residential	Residential	No
•	SessionAttributeCodeCheckbox2	Checkbox	SACC	SACC	No
•	SessionAttributeCodeDropdown	Drop-down	SACDD	SACDD	No
•	SessionAttributeCodeTextArea	Text Area	SACTA	SACTA	No
•	ses_attr	Free Text	ses attr	ses attr	No
•	SessionAttributeCodeFreeText	Free Text	SessionAttributeCodeFreeText	SessionAttributeCodeFreeText	No
•	SessionAttributeCodeNumeric	Numeric	SessionAttributeCodeNumeric	SessionAttributeCodeNumeric	No

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:

							0
Session Attrik	oute Categories	>					U
Create S	ession At	tribute					
Details							
Attribute C	ode*						
Required							
Name 🔞							
Type							
Fiee lex	•						
Sum tot	al when printing	or reporting					
	ory						
Displa	y Areas Setting	s					
Display ar	eas						
Teach	ession Administ	rauon Filter					

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.

Session Attribute Categories	S NetDimensions Talent Suite - Mozilla Firefox		
You can add or modify session attributes here.	localhost:8080/ekp/servlet/ekp?TX=Dispatch&NOT_FROM_SESSION=true&RPID=EKP000145002		☆ * >
	Cancel Report Report ID: test	(2) Report Help	
Session Attribute session attr 2	Properties Columns Grouping Order Filters Summary Save Undo	Advanced	
	Select the columns you wish to include in your report. Dexpand All Dynamic Module Attributes		
	Dynamic Session Attributes		
	Sessing_atr_2 Optional Module Attribute(s) Extra Module Value		1 H
	Instructor Information		

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.

Session	Attribute	Categories
---------	-----------	------------

You can add or modify session attributes here.

			+	Create Session Attribute
Session Attribute	Туре	Label Key	Locale Formatted Label	Mandatory
Test02	Free Text	Test	Test	Yes

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

Session Att	ribute: Test02
Attribute Code:	Test02
Label Key:	Test
Туре:	Free Text V Sum total when printing or reporting ?
Mandatory	

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:

Teach

	ers [Manage] Mod	ule Title/ID/De	escription	Session 3	Status		Venue		
	*			All		-			
Region	Ses	sion Attribute	Name1						
IIA	Nur	mber							
Start Date			End Date						
Date	0	• 00 •	Date		0	• 00 •			
Select ins	tructor(s)	0 selecte	d						
	r a user								
Search	Save As Preset								
-									
								Result	s per Page: 25
	05-4-044							Result	s per Page: 25
owing: 1 - 2	25 of 241							Result:	s per Page: 25
owing: 1 - 2 Change Se	25 of 241 ssion Status 💌							Result: 1 2 + Expo	s per Page: 25 3 4 →
owing: 1 - ; Dhange Se	25 of 241 ssion Status 💌 Module Title (ID)	*	Session Title	Session Status	Venue	Start Date	End Date	Results 1 2 + Expo Seats Registered	s per Page: 25 3 4 → rt Search Results Remaining/Tot Seats
owing: 1 - : Change Se	25 of 241 ssion Status Module Title (ID) AICC Flash Workshop - F examples (123456)	PPT to web	Session Title title (Session)	Session Status	Venue Not applicable	Start Date	End Date	Result: 1 2 + Expo Seats Registered • 3	s per Page: 25 3 4 → 1 rt Search Results Remaining/Tot Seats Unlimited

Transcript Status Manager

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

Manage	e Center							O Sara L
Overview	Learning	Talent	Communicate	Users	Reports	System		
Transcri	ipt Status N	lanager						
Sta	tus						Sub-status	
🔅 Wai	itlisted						+ Add Sub-Status	
🔅 Not	Started						+ Add Sub-Status	
🔅 🛛 In P	Process						+ Add Sub-Status	
🔅 Cor	mpleted						Completed Valid	
🔅 Wit	hdrawn						+ Add Sub-Status	
🔅 Car	ncelled						+ Add Sub-Status	
🔅 Per	nding Approval						+ Add Sub-Status	
🔅 Арр	proval Denied						+ Add Sub-Status	
🔅 Cor	mpleted (Self-Ass	erted)					finished using	
🔅 Pas	ssed						+ Add Sub-Status	
🚓 Eail	led						+ Add Sub-Status	

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.

O2 Online, O No deadline	Completed (Self-Asserted)
Launch 🛛 🔹 🗮 Todo 🕶	Remove from Active List

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":

Event Status: 🔞	Retired •
	Change transcript status of enrolled users correspondingly, for changing the event status
	to Completed, Cancelled or Retired or changing from Prompt User to Select Session to
	another status.

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.
| NetDimensions Talent Suite × + | | | | |
|--|--------------------------------|---------------|----------------------|-----|
| The second secon | p/TRANSCRIPTSTATUSEDITOR?A 🤟 😋 | 🔍 Search 🛃 | 合合自 4 9 * * 9 | 9 |
| NetDimensions Talent Suite | Manage Center | | ADMINISTRATOR System | Log |
| OVERVIEW LEARNING | TALENT COMMUNICATE | USERS REPORTS | SYSTEM | |
| Code* Completed-status-1 | Name 🕲 with Merit | | 0 | |
| completed-status-1 | with Merit | | 0 | |
| completed-status-2 | with Distinctio | n | 0 | |
| | | | | |
| 🖶 Save 🕈 Cancel | | | | |
| | | | | |
| | | | | - |

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

NetDimensions	Talent Suite 🗙 🔪	+														
http://localho	st.8090/ekp/servlet/	ekp?TX=QUI	CKREVIEW&EI	D=EKPI 🦄	C Q Search		÷	A	☆	Ô	4	0	**	•	9	
Review Par	rticipants															
or Module: C	Online2 (MOD-	0001)														
					HIDE FILTERS											
First Name		Last Na	me		User ID			Sta	tus							
_								AI								
Filter																
											Res	sults	per F	age:	10	-
Showing: 1 - 10 of	f 68															
214																
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Name Titl	Organization UNASSIGNED	Start Date Jan 9, 2015	Completion Date Jan 22, 2015 5:48	Credits 0	Overall Status COMPLETED	Overall Status Cha	ange			; -	Perfor Grade	mano	e •	Pre-	Asse re	9
Name Titl EIGHT User (USER8)	D Organization	Jan 9, 2015 2:55 PM CST	Completion Date Jan 22, 2015 5:48 PM CST	Credits 0	Overall Status COMPLETED	Overall Status Cha	ange Aerit)			•	Perfor Grade N/A	mano	•	Pre- Scol	Asse re	S
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Name Titl EIGHT User (USER8) FIVE User (USER5) FIVE User (USER5) FOUR User (USER4) FOUR User	Organization UNASSIGNED OrgGroup2 OrgGroup2 OrgGroup2	Start Date Jan 9, 2015 2:55 PM CST Dec 19, 2014 4:45 PM CST Aug 27, 2013 10:36 AM CST Juli 17, 2013 4:01 PM CST Date to	Completion Date Jan 22, 2015 5:48 PM CST Jan 19, 2015 5:13 PM CST Jul 17, 2013 4:01 PM CST	Credits 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	COMPLETED COMPLETED (with Merit) CANCELLED	Overall Status Cha Completed (with M Completed (with M Completed (with D Failed Deactivated In Process In Process (In Pro Waiver/Exempt (E Waiver/Exempt (E 	Aerit) Distinc cess- quival	tion) SubSl ence V	tatus1 ualific Vaiver) ation)	N/A			Pre-Scot	Asser	15

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.

http://loc	alhost	8090/ekp/servlet/	ekp?TX=QU	ICKREVIEW&EII	D=EKPI ♥	C Q Search		*	A	☆	ê	1	8	*	- 9	
Name	Job Title	Organization	Start Date	Completion Date	Credits	Overall Status	Overall Status Cl	hange				Perfor Grade	manc	e	Pre-As Score	sess
EIGHT User (USER8)		UNASSIGNED	Jan 9, 2015 2:55 PM CST	Jan 22, 2015 5:48 PM CST	0	COMPLETED			_		•	N/A		•		
FIVE User (USER5)		OrgGroup2	Dec 19, 2014 4:45 PM CST	Jan 19, 2015 5:13 PM CST	0	COMPLETED (with Merit)]-				•	N/A		•		

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:

http://localhost:8090/ekp/ser	vlet/ekp		∀ C'	Q. Search		*	Â	☆	Ê	4 6	* *	• Ø	
Enrollment Wizard The enrollment wizard allows yo apply to the selected module (or ddditional input fields will autom	u to select a participa group of modules) at atically be displayed v	int (or a group of the session lew with respect to t	f particip el. Note he enrol	ants) for direct (, however, that s Iment action sel	execution of ome enrolln ected.	an en nent ac	rollmer	nt act may r	ion. Th equire	e enroll additior	ment a nal inpu	ction will uts. These	e
Select participant(s) Select participant(s) Remove participant(s)	- Select a target stat Not Started Not Started (Not Stat In Process In Process (In Proces	us - ted-SubStatus1)		Selec Selec Remo	ct mod t mod	lule(s) ule(s) dule(s)				0	- th
ONE User (USER1-1)	Completed Completed (with Mer Completed (with Dist Withdrawn Failed No show Waiver/Exempt Waiver/Exempt (Equ	it) inction) ivalent Qualificat	E iion)	ollment Status	Onlir	ne1 (M	OD-00	00), C	Online				4 F
Setting - Change Enrollme Change enrollment procedure	Waiver/Exempt (Exp Withdraw - Valid Rea Withdraw - Invalid Re Excused Excused (illness)	erience Waiver) Ison Pason											
Suppress automatic e-mails	Excused (jury service Dropped from Waitlis	e) it	-										
Target Status	- Select a target sta	itus -	•										
	Data		Down	and lon	De	woloo	d failer	d ontri					

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:

Catalog Editor - Mozilla Firefox									
http://localhost:8090/ekp/servlet/ekp/	BSCATFR	AMES?	LID=MOD-0000						*
Catalog Editor					0 0	8 %	()		
Module Properties Session Properties								Results per Page	25 💌
Online1 (MOD-0000)	Show	ing: 1	- 25 of 44					1 2) »
Online Session	Bul	k Acti	on 💌					44 AA	
Session Setup - the following steps help you to define a session. 1. Edit session 2. Enter cost information 3. Participants		¢	100 User1 (USER1_100)	Withdrawn on Feb 6, 2015 4:04 PM CST	Not Applicable	EXCUSED (illness)		•	
4. Instructors 5. E-mail Preferences Setup 6. Cost Accounting Information 7. View usage statistics 8. Checklist		¢	ONE User (USER1)	Enrolled on Jun 28, 2013 12:13 PM CST	Not Applicable	COMPLETED (with Merit)			•
Session Utilities - before you use hese utilities, please save any hanges you have made		¢	ONE User (USER1)	Enrolled on Aug 15, 2013 2:31 PM CST	Not Applicable	COMPLETED (SELF- ASSERTED)	-		•
9. Auto-Enroll 10. Group Enroll 11. Group Training Plan 12. Knowledge Center Preview		•	ONE User (USER1)	Enrolled on Aug 22, 2013 6:51 PM CST	Not Applicable	COMPLETED (SELF- ASSERTED)			•

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

http://localbort/2000/aks/cond-t/	alm2TV-Dispatch&NOT EDOM STOCION	-true 8:0010_EV0000152000	
http://iocainoscoupu/ekp/serviet/	ekp: TA=DispatchoorU_PROM_36331014	=IIIEOXAPID=EKP000133000	
Cancel Report			
Training Center			
Transcript Attribute			
 Transcript Detail 			
Assessment Date	Deadline	Post-Assessment Score	Transcript Overall Status
Assessment Score	Deadline Expired	Pre-Assessment Score	Transcript Sub-Status Code
Assignment Learning	End Date	Quick Evaluation Comment	Transcript Sub-Status Name
Attempts Count	Enrollment Date	Revision	Update Meaning
Attendance	Final Score	Session ID	🔲 Updater's legal name
Cost Center	Notify E-mail	Signed Date	
Credits	Performance Grade	Start Date	
User Groups			
Direct Appraiser			
Organization Attributes			
Geographic Regions			
Save Undo			

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

NetDimensions Talent Sui	te - Mozil	lla Firefox					x
http://localhost:8090/ek	p/servlet/	ekp?TX=Dispatch&NOT_FF	ROM_SESSION=true&RPID=E	KP000	0153800		
Cancel Report							
TraningHistoryReport 1							-
Date Run: Feb 26, 2015							
Time Zone: China Standa							
							ш
Geographic Regions- Geographic Region Description	٥	Transcript Detail- ≎ Session ID	Transcript Detail- Transcript Overall Status	٥	Transcript Detail-Transcript \$\$\$ \$\$\$ \$	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-Assert	ted)			
		Session1	Completed (Self-Assert	ted)			-

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.

Ne	tDimensions 1	alent Suite	Mana	ge Centre				🛔 Katrina Sapla	ila Logout
ov	ERVIEW	EARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM		
Col	of the course pr	_isting	elow may be er	lited and published in th	ie catalogue(s)	Use the CREATE	E button to start a ne	ew course project.	
Bu	Ik Action 🔻							¢ Refresh + Cre	ate
0	Bills of Material and Engineering Fundamentals	In this course business more orders. Stude bills of materi manufacturing	, students will lels and scena nts will learn h al, routings, ar g. Upon comple	learn how to use Oracle rios. Students will also ow to set up, implemen d engineering change o stion of this course, stud	Bills of Materi learn how to us t, and use bill o rders. They will dents will be pr	al to define differen e Oracle Enginee of material and eng I also learn how to epared to use Ora	nt types of bills of m ring to create and in jineering information copy and transfer e cle Bills of Material	aterial to accommodate varior nplement engineering change . Students will practice creati engineering information to and Oracle Engineering.	ng
-	Procedure	A tost proceed	uro for o loami	0.0					

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.

Courseware Editor	C B B 🗊 ? X
Bills of Material and Engineering Fundamentals Courseware Properties Courseware Template	Courseware Editor
Create Bills of Material Create Routing Create and implement engineering change orders Evaluation	This editor is used to create custom online modules with lessons constructed from already uploaded files. You may have any number of lessons, and a Course Template may be selected to control the general appearance of the frame. If no template is specified, the course will use the learner's default skin style sheet. Typical course project preparation steps are
Permissions	Create the course; Optionally, select a template to control its appearance; Add lessons (using the menu icon above); Click on the new lesson name in the left frame to configure the material; Preview the course (using the menu icon above); Save the finished course (using the menu icon above);

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		
Showing: 1 - 10 of 16		
Bulk Action 💌		
Training Center Name	∧ Venue	Description
L 🗘 44		
Edit	a Venue	a description
Permissions	b	b
Delete	b	b
C	c	с

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

Overview Learning	Talent Commun	icate Users	Reports	System		
fraining Centers >						
- Edit Industrial Ski	lls Center					
Luit industrial Ski	lis center					
Properties						
Training centers are used	to identify "collections" of r	elated physical facilit	ties/rooms.			
Training Center Name						
Industrial Skills Center						
Description						
Main building on the so	th side of campus					
		1.				
Venue						
building #31						
		1				
Contact Info:						
Ext. 1328						
		1				
Directions						
Map		11				

Facilities

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

			✓ HIDE FILTERS			
Trair	ning Center	Status	Venue	# c	of Seats	
All	1	▼ All	•			
Min	# of VGA Projectors	Min # of Learner PCs	Min # of Whiteb	ooards Min	n # of Overhead Projectors	
Roor	m is expandable?	Has a display PC?				
An	ıy	▼ Any	•			
					Results per Page	e: 25 🔻
howin Bulk	ng:1-6of6 Action ▼				Results per Page + Create	e: 25 🔹
howin Bulk	ng: 1 - 6 of 6 Action Name/Code		 Location 	Training Center	Results per Page + Create r	e: 25 •
howin Bulk	ng: 1 - 6 of 6 Action • Name/Code	Room 1 (RM1)	▲ Location 1st Floor	Training Center 01 Training Ce	Results per Page + Create rr	e: 25 • • Facility
Bulk	Action Action Action Action Anne/Code O1 Computer F O1 Conference	Room 1 (RM1) Room A (CRA)	 Location 1st Floor 2nd Floor 	Training Center 01 Training Center 01 Training Center	Results per Page + Create rr	e Facility
Bulk	ng: 1 - 6 of 6 Action Name/Code O1 Computer f O1 Conference O1 technical ro	Room 1 (RM1) : Room A (CRA) :om B (TRB)	 Location 1st Floor 2nd Floor 3rd Floor 	 Training Center O1 Training Ce O1 Training Ce O1 Training Ce 	Results per Page + Create err Status enter Not Available enter Available	e Facility
howin Bulk	ng: 1 - 6 of 6 Action V Name/Code O1 Computer F O1 Conference O1 technical ro O1 technical ro	Room 1 (RM1) Room A (CRA) Horm B (TRB) om A (TRA)	 Location 1st Floor 2nd Floor 3rd Floor G/F 	 Training Cente O1 Training Ce 	Results per Page + Create err	E Facility
Bulk	Action Name/Code O1 Computer F O1 Conference O1 technical ro O1 Training Ro O1 Training Ro	Room 1 (RM1) Room A (CRA) Iom B (TRB) om A (TRA) om C (TRC)	Location 1st Floor 2nd Floor 3rd Floor G/F Block A	 Training Center O1 Training Center 	Results per Page + Create er	e Facility

Depending on access control and permissions, you can:

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

OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
Facilities >							
Edit 01 Cor	nputer Ro	om 1					
Facility Details	Schedule						
Room Inform	ation						
Update the fields	as required. A fa	cility status of	"Not Available" means	that the facil	ity cannot be sel	ected as a classroom venue choice.	
Facility Code							
RM1							
Location							
1st Floor							
Training Center							
O1 Training Cent	er 🔻						
Status							
Not Available V							
Category							
Computer Room	•						
Venue							
O1 Computer Ro	om 1						
			4				
Contact Info:							

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

ñ	NetDi	imensions Talent Suite	Man	age Center					n Logout
	OVER	VIEW LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM		
	Instr	uctors							
					✓ HIDE FILT	TERS			
	Quali	fied Course							
			i •••						
	Filte	er Reset							
								Results per Page: 10	•
	Showing	j: 1 - 10 of 16						« < 1 2 >	»
								Auto-Populate + Create instructo	or
		Name	 User ID 	Organization	Qualifi	ied Courses			
		100 Uport	upper1 100		• Cla	assroom3 (MOD-0	023) Program1 (MOD 00	24)	
	\$	100 USET	user1_100	ALL/UNASSIGNED	• Co	mo Elecciones (M	ANIFEST-EF70734	F-AEB0-703B-AB03-2A4C8B70D8D7)	
					• On	line3 (MOD-0002))		*
	÷.	ADMINISTRATOR System	ndadmin	ALL/UNASSIGNED	• On • Tas	<pre>iline4 (Limited Atte sk1 (MOD-0013)</pre>	empts) (MOD-0003))	-
		EIGHT User	user8		• 191	1_Program (MOD-	-0191)		
	*	EIGHT USEI	usero	ALL/UNASSIGNED	• Cla	assroom2 (MOD-0	015)		
	\$	EKP2 User1	user1_ekp2	ALL/UNASSIGNED	• C+	+ (T2)			
		FIVE User	user5	ALL/OrgGroup2	• AlC	CC SAMPLE AUTH	ORWARE COURS	E (AICC-SAMPLE-COURSE-1)	* II
	246		43010	, and orgonoup2	• Cla	assroom4 (Classro	pom4)		-

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:

Overview Learning	Talent Commu	icate Users	Reports Syste	em			
Instructors							
		Create instru	ctor			×	
Qualified Course Maths (MOD-2335) Filter Reset Showing: 0 - 0 of 0		To manage a user a qualified to teach. T Instructor: PARKER Alex (ALI Course: Maths (MOD-2335	is an instructor, there m herefore, identify an init EX PARKER))	ust be at least one association association association and the second s	iated course the person is on using the selectors below B	и.	Results per Page: 10 🔻
Name	User ID	Create	Cancel			Auto-Populate	+ Create instructor
			There are	e no items to display.			

Auto-Populating Qualified Instructors

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

	Auto-Populate ×	Page. 10
1 - 10 c	This function will search through all current course instructor assignments to populate the qualified course list for each instructor.	ate instructo
Name	Auto-Populate Cancel	

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

Auto-Populate		×
Auto-Populate of instructor qualifi	ications has added the following number of new en	ntries: 0
		þ
		- 1

Viewing Instructor Profiles

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

Instructor Info	Qualified Courses Sch	edule	
Profile Sum	mary		Recent Activity
	ADMINISTRAT	TOR System	There is no recent activity to display.
	User ID:	NDADMIN	
	Organization:	ALL/UNASSIGNED	
	E-mail:	ndadmin@netdimensions.com	
	vCard:	Download	

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.

	INIS	TRATOR System	
Inst			
insu	fuctor in	uu uuaineu courses scriedule	Results per Page: 25
Showi	ng: 1 - 1	7 of 7	
Bulk	Action	•	+ Add Qualified Course
		Module Title (ID)	л Туре
	÷.	AICC Flash Workshop - PPT to web examples (123456)	Online
	φ	AICC SAMPLE AUTHORWARE COURSE (AICC-SAMPLE-COURSE-1)	Online
	φ	C++ (T2)	Online
	ф	Classroom2 (MOD-0015)	Classroom
	•	Online3 (MOD-0002)	Online
	0	Online4 (Limited Attempts) (MOD-0003)	Online

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

01/501/15111		TALENT		1105.05	DEDODTO	OVOTEN	
OVERVIEW	LEARNING	IALENI	COMMUNICATE	USERS	REPORTS	SYSTEM	
Class Reso	ources						
			*	IDE FILTERS			
Training Cente	r	Resource Co	ode/Name	Resource Type	2	Serial Number	
All	•			(All)		•	
Filter Res	et						
						Resu	Its per Page: 25
						Resu	Its per Page: 25
Showing: 1 - 1 of	1					Resu	Its per Page: 25
Showing: 1 - 1 of	1					Resu B Print	Its per Page: 25
Showing: 1 - 1 of Resourc	1 e Name 🔺 Training	j Center ≎ Type	e \$ Serial Number \$	Quantity on Hand	Description	Resu B Print	tts per Page: 25 + Create resource
Showing: 1 - 1 of Resourc	1 e Name × Training Default	ן Center ≎ Туре Othe	≥ \$ Serial Number \$ er 12	Quantity on Hand	Description	Resu e Print	Its per Page: 25
Showing: 1 - 1 of Resource R1 Edit Resource	1 e Name × Training Default Details	ן Center ≎ Турк Othe	e \$ Serial Number ≎ er 12	Quantity on Hand	Description	Resu	Its per Page: 25
Showing: 1 - 1 of Resource R1 Edit Resource	1 e Name × Training Default Details	g Center ≎ Type Othe	e \$ Serial Number \$ er 12	Quantity on Hand	Description	Resu	Its per Page: 25
Showing: 1 - 1 of Resource R1 Edit Resource View Schedule Delete	1 e Name × Training Default Details	j Center ≎ Type Othe	e \$ Serial Number ≎ / er 12	Quantity on Hand	Description	Resu	Its per Page: 25 + Create resource
Showing: 1 - 1 of Resource R1 Edit Resource View Schedule Delete	1 e Name Training Default	ן Center ≎ Typα Othα	e \$ Serial Number \$ er 12	Quantity on Hand	Cescription	Resu	Its per Page: 25

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

OVERVIEW I	LEARNING TALENT COMMUNICATE USERS REPORTS SYSTEM	
Class Dessures		
Class Resources >		
Edit Projecto	r	
Resource Details	Schedule	
User-defined resourc	es may be used to identify and track reservations for miscellaneous materials associated with the delivery of live training.	
	Code*	
** Stary		
-	Projector	
	Image for class resource	
	projector png(300x300)-1	
	HCL Center for Learning	
	None Assigned	
	Resource Type	
	VGA Projector	
	Serial Number	
	4324-2342-3423	
	Resource Specifications:	A
	 Type of Display: Poly-silicon TFT active matrix 	
	 Resolution: 1024 x 768 pixels (XGA) 	_
	Quantity on Hand *	
	1	
	Pre Processing Time	
	0 Days	

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:

Catalog Editor	0 0	8 @ Ŵ X		
Session Properties Module Properties	Recommend	led Class Resources		
Advanced Business Management (MOD-0001)	Advanced Bus	iness Management		
1 Catalog Setup 1.1 Define Module Properties 1.2 Enter cost information 1.3 Enter objectives	Select Class Resou schedule and can a Showing: 1 - 2 of 2	rces that are recommended for this course. Rec Iso be filtered for in the Class Resource selector	ommended Class Resources will be automatically loaded w	hen adding new classes to the
1.4 Enter references 1.5 Preview				+ Add Resource
1.6 View usage statistics 1.7 Indicated Interest List		Resource Code	Resource Name	
 1.9 Vitual Archive 1.10 Checklist 1.11 Recommended Class Resources 		CR-0000	Projector	×
2 Access control/enroliment control 2.1 Define Module Security 2.2 Assign prerequisites	R	CR-0001	Flipchart	×
2.3 Assign Recommended Course(s) 2.4 Assign exam/certification/evaluation 2.5 Define Enrollment Policy 2.6 Enrollment Restriction 2.7 E-mail Preferences Setup	Showing: 1 - 2 of 2			
3 Knowledge Center Setup 3.1 Setup Options				
4 Launch setup 4.1 Define Launch Properties 4.2 Preview 4.3 Provied Launch Package				

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

Period	Sched	ule a New Class					
ate: n = 0 + 0, 2018 m = 0 + 0, n = 0, e = Feb 7, 2018 m = 10 + 0, e = 0,	eriod						
Cection / Room Venue Room Name Training Center Please Select) To Working Days: Mon • To Fri • Working Days: Mon • To • Working Case </th <th>ate: e.g</th> <th>g Feb 7, 2018 🛗 9</th> <th>▼ 00 ▼ To e.g Feb 7, 2018</th> <th>17 ▼ 00 ▼</th> <th>Go Previous Fit Next Fit</th> <th></th> <th></th>	ate: e.g	g Feb 7, 2018 🛗 9	▼ 00 ▼ To e.g Feb 7, 2018	17 ▼ 00 ▼	Go Previous Fit Next Fit		
None Room Name Training Center (Please Select) To To Working Days: Mon • To Fri • Working Days: Mon • To Tri • Working Days: Mon • To To To Working Days: Mon • To To To Working Days: Mon • To To To Working Days: Mon • To To To To Working Days: Mon • To To To To Working Days: Mon • To To To None Assigned Instructors Alex Parker (ALEX PARKER) Kesources • CR-0000: Projector (1) CR-0000: Flipchart (1)	ocatio	n / Room					
Room Name Intaining Center (Please Select) Class Size: To Working Hours: Image: Too Image: T) Venu	e					
working Center (Please Select) Class Size: To To None Center and facility/venue, then select and book resources by entering the quantity. Additional shared resources can be added by using the Resource Selector by pressing the "+". Resource Mon 05 Feb Tue 06 Feb Working Center Venue/Room \$ None Assigned Instructors + Alex Parker (ALEX PARKER) Resources © + 0 CR-0001: Flipchart (1) *	Roon	n Name					
Class Size: To Working Hours: Image: To Working Hours: Image: To Image: To Working Hours: Image: To Image: To Working Hours: Working Hours: Working Hours: Working Hours: <	Traini	ing Center (Please Select)	T		Working Days: Mon	▼ To Fri ▼	
elect the training center and facility/venue, then select and book resources by entering the quantity. Additional shared resources can be added by using the Resource Selector by pressing the "+". Sook Resource Mon 05 Feb Tue 06 Feb Wed 07 Feb Thu 08 Feb Fri 09 Feb Venue/Room Venue/Room Venue/Room Venue/Room Cencedian Cenc	Class	Size:			Working Hours: 9	• 00 • To 17 • 00 •	
Resource Mon 05 Fab Tue 06 Fab Wed 07 Feb Thu 08 Fab Fri 09 Fab Venue/Room \$ None Assigned -		10					
None Assigned • Instructors • Alex Praker (ALEX PARKER) • CR-0001: Flipchart (1) •							
Venue/Room \$ None Assigned * Instructors * Case Parker (ALEX PARKER) (Qualified Instructor) * Resources Image: CR-0000: Projector (1) The state of th	elect the	e training center and facility/venue, t	then select and book resources by ente	ring the quantity. Additional sh	nared resources can be added by using	the Resource Selector by pressing t	he "+".
None Assigned Instructors + Alex Parker (ALEX PARKER) (Qualified Instructor) * Resources + CR-0000: Projector (1) * CR-0001: Flipchart (1) *	elect the look	e training center and facility/venue, t	then select and book resources by ente Mon 05 Feb	ring the quantity. Additional sh Tue 06 Feb	nared resources can be added by using Wed 07 Feb	the Resource Selector by pressing t	he "+". Fri 09 Feb
Instructors Alex Parker (ALEX PARKER) (Qualified Instructor) Resources CR-0000: Projector (1) X CR-0001: Flipchart (1)	elect the look	e training center and facility/venue, i Resource Venue/Room	then select and book resources by ente Mon 05 Feb φ	ring the quantity. Additional sh Tue 06 Feb	nared resources can be added by using Wed 07 Feb	the Resource Selector by pressing t	he "+". Fri 09 Feb
Alex Parter (ALEX PARCER) x Resources ● + CR-0000: Projector (1) ■ x CR-0001: Flipchart (1) ■ x	elect the look	training center and facility/venue, t Resource Venue/Room None Assigned	then select and book resources by ente Mon 05 Feb φ	ring the quantity. Additional sh Tue 06 Feb	nared resources can be added by using Wed 07 Feb	the Resource Selector by pressing t	he "+". Fri 09 Feb
Resources + CR-0000: Projector (1) + CR-0001: Flipchart (1) +	elect the look	training center and facility/venue, t Resource Venue/Room None Assigned Instructors	then select and book resources by ente Mon 05 Feb Φ	ring the quantity. Additional sh Tue 06 Feb	nared resources can be added by using Wed 07 Feb	the Resource Selector by pressing t	he "+". Fri09 Feb
0 CR-0000: Projector (1) × 0 CR-0001: Flipchart (1) ×	elect the Book	training center and facility/venue, t Resource Venue/Room None Assigned Instructors Alex Parker (ALEX.PARKER) (Qualified Instructor)	then select and book resources by ente Mon 05 Feb Φ +	ring the quantity. Additional sh Tue 06 Feb	tared resources can be added by using	y the Resource Selector by pressing t	he "+". Fri 09 Føb
0 CR-0001: Flipchart (1)	elect the Book	training center and facility/venue, t Resource Venue/Room None Assigned Instructors Alex Parker (ALEX.PARKER) (Qualified Instructor) Resources @	then select and book resources by ente Mon 05 Feb Φ + ×	ring the quantity. Additional sh Tue 06 Feb	tared resources can be added by using	y the Resource Selector by pressing t	he "+". Fri 09 Føb
	Book	training center and facility/venue, t Resource Venue/Room None Assigned Instructors Alex Parker (ALEX PARKER) (Qualified Instructor) Resources © CR-0000: Projector (1)	then select and book resources by ente Mon 05 Feb φ + × * ×	ring the quantity. Additional sh	vared resources can be added by using	y the Resource Selector by pressing t	he "+". Fri 09 Feb
	Select the Book	training center and facility/venue, t Resource Venue/Room None Assigned Instructors Alex Parker (ALEX PARKER) (Qualified Instructor) Resources @ CR-0000: Projector (1) CR-0001: Flipchart (1) CR-0011: Flipchart (1) CR-001: Flipc	then select and book resources by ente Mon 05 Feb Φ + × * × × × ×	ring the quantity. Additional sh Tue 06 Feb	lared resources can be added by using	y the Resource Selector by pressing t	he "+". Fri 09 Feb
	elect the Book	training center and facility/venue, t Resource Venue/Room None Assigned Instructors Alex Parker (ALEX PARKER) (Qualified Instructor) Resources @ CR-0000: Projector (1) CR-0001: Flipchart (1)	then select and book resources by ente Φ + × * × × ×	ring the quantity. Additional sh	lared resources can be added by using	the Resource Selector by pressing t	he "+". Fri 09 Feb

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

Overview	Learning	Talent	Communicate	Users	Reports	System				
Class Resour	ce Attributes >									0
Edit Clas	s Resourc	e Attrib	ute for Supp	ort						
Details										
Attribute C	ode*									
Support										
Name 🔞										
Support C	ontact									
Туре										
Free Text	•									
Resource	Types									
Other										
 Badges Equipm 	ent									
Handou	ls									
Instruct	r Guides									
Name P	lates									
Learner	Guides									
VGA Pr	ojector									
🗹 Demo U	nit									
Display	Areas Settings									
Display are	as									
Class R	esource Filter 🔞									
Class R	esource Column									
Catalog	Editor Recomme	nded Class I	Resources							

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:

	arning Talent	Communicate	Lieare Danorte	System				
Overview Lea	arriing raient	Communicate	Users Reports	System				
Facilities >								
ABC								
AB0								
Facility Details	Schedule							4
								+ Create Event
Jul 26, 2019	Schedule D	Details		×	V Jul 21, 2	019 - Jul 27, 2019		
	Sui				/ed 24	Thu 25	Fri 26	Sat 27
						9:00 - 17:00		
7:00	🖀 Behavioria	l Analysis (ba)				Behaviorial Analysis (
7:00 8:00	Session Title	I Analysis (ba) Summer 2019				Behaviorial Analysis (* ABC, train * PARKER Alex		
7:00	Session Title Start Date	I Analysis (ba) Summer 2019 Jul 24, 2019 9:01	D AM			Behaviorial Analysis (ABC, train PARKER Alex 5		
7:00 8:00 9:00	Session Title Start Date End Date	I Analysis (ba) Summer 2019 Jul 24, 2019 9:0 Jul 25, 2019 5:0	0 AM 0 PM	4	Analysis (Behaviorial Analysis (TABC, train APARKER Alex 5		
7:00 8:00 9:00 10:00	Behaviorial Session Title Start Date End Date Location	I Analysis (ba) Summer 2019 Jul 24, 2019 9:01 Jul 25, 2019 5:01 ABC, train	0 AM 0 PM	4	analysis (Jex	Behaviorial Analysis (7ABC, train #PARKER Alex 5		
7:00 8:00 9:00 10:00	Location Instructors	I Analysis (ba) Summer 2019 Jul 24, 2019 9:00 Jul 25, 2019 5:00 ABC, train PARKER Alex	d AM D PM	4	analysis (Behaviorial Analysis (7480; train APARKER Alex 5		
7:00 8:00 9:00 10:00 11:00	Location	I Analysis (ba) Summer 2019 Jul 24, 2019 9:01 Jul 25, 2019 5:01 ABC, train PARKER Alex	0 AM 0 PM	4	lex	Behaviorial Analysis (480; tran APARKER Alex 5		

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:

People	e Fluent										
#	Manage Ce	enter								🛔 HO Sara	Logout
	Overview	Learning	Talent	Communicate	Users Reports	System					
	Facilities >			Create Even	t			×			
	ABC			0							
	Facility Deta	ails Sche	dule	Select Event Typ	pe Provide Event Details	Check Availability	Save Options	Booked Successfully			
				Module Ses	sion					+ Create Event	
	Jul 26, 2019	6	Today	Pacinty Book	ang					+ Office Even	
		Sun 21							ri 26	Sat 27	
	7:00										
	8:00										
	9:00								-		
	10:00			Continue	Cancel						
	11:00										
	12:00										
	13:00										

3. Provide the "Facility Booking" Event Details.

Manage Center			🛔 HO Sara
Overview Learn	ing Talent	Create Event ×	
Facilities >			
ABC		Select Event Type Provide Event Details Check Availability Save Options Booked Successfully	
		Title *	
Facility Details	Schedule	Booker*	
		HO Sara (SARA)×	+ Create Event
Jul 26, 2019	😮 Today	Facilities * 1 selected ABC (A1) × •••	
S	un 21	Search for a Venue ri 26	Sat 27
7:00		Start Date *	
8:00		Jul 23, 2019 09:00	
9:00		End Date* Jul 23, 2019 (3) 10:00	
10:00		Comment	
11:00			
12:00		Continue Cancel	
12.00			

4. Check Availability and Confirm

PeopleFluent					
# Manage Center				📥 HO Sara	Logout
Overview Learning Talent	Communicato Usors Doports Sustam				
Facilities >	Create Event	*			
Facility Details Schedule	Select Event Type Provide Event Details Check Availability Title: Booker: HO Sara (SARA) Start Date: Jul 23, 2019 09:00	Save Options Booked Successfully		+ Create Event	
Jul 26, 2019 😮 Toda	End Date: Jul 23, 2019 10:00				
Sun 21	Comment:		ri 26	Sat 27	
7:00	Resource	Availability			
8:00	✓ ABC (A1)	✓ Available			
9:00					
10:00					
11:00	Back Continue Cancel				
12:00					
13:00					

5. View Event Summary.

manage Genter									
Overview Learni	ing Tal	ent	Communicate Us	ers Reports	System				
Facilities >			Create Event				×		
ABC									
Facility Details	Schedu	le	Select Event Type	Provide Event Details	Check Availability	Save Options	Booked Successfully		
			Title: Booker:	♥ Meeting HO Sara (9 SARA)				+ Create Event
Jul 26, 2019	8	Today	Start Date:	Jul 23, 201	19 09:00				
Su	ın 21		End Date:	Jul 23, 201	19 10:00			ri 26	Sat 27
7:00			Location:	ABC (A1)					
8:00									
9:00								_	
10:00			Close						
11:00									
12:00									

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.

t Suite		Man	age Center							🔺 YE
NING	TAL	FNT	COMMUNICA	TF	USERS	RFF	PORTS	SYSTEM		
	Ed	lit Ev	ent						×	
		Edit	O Event Details	С	heck Availab	ility	Boo	oked Successf	ully	•
edule		B		ES						
		Lear	ning Module*							I +
		Mar	nagement Training	(MOD-0	007)					_
		Sess	ion Title							
		Mar	nagement Training	in Sept :	2017					
		Sess	ion Code*							
		NC	9329							
		Start	Date*							
9:00 - 1 Mana		Sep	18, 2017	8	09:00					
ARoor		End	Date*							
		Sep	18, 2017	6	12:00					-
		continue								

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:

Edit Event Detail	s Check Availabilit	Booked Successfully
Learning Module:	📽 C1	
Session Title:	What's new in NTS 13.1	
Session Code:	NTS131	
Start Date:	Jun 26, 2017 07:00	
End Date:	Jun 26, 2017 17:00	
Description:		
Resource		Availability
◀ Room-Paris (RP)		🗸 Available
🌢 Joe Blank (_USER0	000001)	🖌 Available
🎍 Peter Pan (_USER0	000002)	✓ Available
Projector-A		🖌 Available
Projector-B		✓ Available
Video Conference		✓ Available
		1
		1

- 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:

Day W	eek	Mont	h			
		7 sel	ected	Jun 26, 2017	C	Toda
Add Facility/Instru	uctor/Res	ource		Mon 26	1	Tue 27
✓ Room-Londo Default	n				7:00 Tea ∢Roo ≜Syst	
✓ Room-Paris Default			3	7:00 - 17:00 C1 ≄Room-Paris ∎Joe Blank, Peter Pan ≅Projector-A × 1, Vide		
Soe Blank				7:00 - 17:00 C1 ≄ Room-Paris ▲ Joe Blank, Peter Pan ✿ Projector-A × 1, Vide		
Peter Pan _USER0000002				7:00 - 17:00 C1 ✔Room-Paris ▲Joe Blank, Peter Pan ✿Projector-A × 1, Vide		
Projector-A Default				7:00 - 17:00 C1 ≁Room-Paris		

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:

Resource Planner	Resources			×		
Day Week Month	Facilities	2 selected		+ C	reate Event 🛛 💩 R	Refresh
	Room 1 (RM1)× Room 2 (RM2)×					
0 seler	Search for a Venue					\$
Add Facility/Instructor/Resource	Instructors	0 selected			Mon 20	Tue
	Search for a user					
	Posourcos	0 estected				
	Search for a Resource	• Selected				
		Facility Selector				×
		Facility Code/Venue	Training Center	Status		
			All	All	•	
		# of Seats	Min # of VGA Projectors	Min # of Learner PC	s	
		Min # of Whiteboards	Min # of Overhead Projectors	Room is expandable	02	
				Any	•	
	Apply Resource Presets Cance	Has a display PC?				

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:

					+ Create Event Ø Refre
0 selected Feb 8	0 selected Feb 8, 2017 💿 Today		Feb 6, 2017 - Feb 10, 2017 >		
	Mon 6	Tue 7	Wed 8	Thu 9	Fri 10
Venue-1 (F1)					
V-2 (F-2)					
N-1 (F-3)					
AN-1 (F-4)					
Facility1 (FA1)					
Facility2 (FA2)					
FACILITY Instructor1					
A_INSTRUCTOR1)					
and the second sec					
STUDENT five (STUDENTS)					
STUDENT five (STUDENTS) STUDENT four (STUDENT4)					
STUDENT five (STUDENTS) STUDENT four (STUDENT4) FacilityResource1					

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

Resource Planner					
Day Week Month					+ Create Event Ø Refresh
0 selected Feb 8, 2	2017 😮 Today		Feb 6, 2017 - Feb 10	l, 2017 🔉	0
Add Facility/Instructor/Resource	Mon 6	Tue 7	Wed 8	Thu 9	Fri 10

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:

Wed Feb 1	5, 2017 >		•
	14:00	15:00	Resource Presets
			Save Resources as Preset
			Working Days and Time
			Display Fields

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.

10:00	11:00	12:00	13:00		14:00	
	Save	e Resources as Preset		×		
	Prese	t Name				
	Requ	ired				
	Set	as default				
	Prope	erties				
	Facilit	ies:				
	Instru	ctors: ADMINISTRATOR	System			
	Resou	irces:				
	Sav	e Close				
				_		

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

			Resu	ılts per Page: 25 ▼
Showing	: 1 - 1 of 1			
Bulk A	Action 🔻			
-	Preset Name	 Created on 	Last Modified On	\$
	🔅 a	Feb 9, 2017 by ADMINIST	RATOR System Feb 9, 2017 by ADMINIS	TRATOR System
	Load			
Showin	Edit			
	Delete			
	Set as default			

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

Facilities 0 selected Search for a Venue ••• Instructors 0 selected Search for a user ••• Resources 0 selected Search for a Resource •••		
Search for a Venue ••• Instructors 0 selected Search for a user ••• Resources 0 selected Search for a Resource •••	0 selected	
Instructors 0 selected Search for a user ••• Resources 0 selected Search for a Resource •••		
Search for a user ••• Resources 0 selected Search for a Resource •••	0 selected	
Resources 0 selected Search for a Resource •••		
Search for a Resource	0 selected	
		0 selected 0 selected 0 selected 0 selected ••• 0 selected •••

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.
- There is a holiday associated with the Training Center to which the Facilities / Instructors / Resources belongs.

Event ϕ Refresh
•
Fri 17

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":

OVERVIEW LEARNING	TALENT O	OMMUNICATE	USERS	REPORTS	SYSTEM				
Resource Planner									
Day Week Month]								Create Event
6 selecte	Mar 1, 2017	0	Today			< March	2017	>	•
Add Facility/Instructor/Resource		Mon 6	Tue 7	Wed 8	Thu 9	Fri 10	Sat 11		Resource Presets
& Barry Singer									Save Resources as Preset
ALL/Pseudo Corp/United Kingd Production Manager (UK)	r.								Working Days and Time
Alex Parker ALEX.PARKER ALL/Pseudo Corp General Manager (Production)	L		7:00 - 17:00 Financial Se #Room 1, ABC Alex Parker Elaptop 1 × 1						Display Fields
✓ Room 1 ABC Training Center Available Room 1	L	9:00 - 17:00 Accounting ⊀Room 1, ABC ≜Irene Banks,	7:00 - 17:00 Financial Se ✓ Room 1, ABC ▲ Alex Parker ■ Laptop 1 × 1	9:00 - 17:00 Digital Citize * Room 1, ABC len Gaudeer Resolve Confl.					
✓ Room 2 ABC Training Center Not Available Room 2		0:00 - 23:55 Room Under # Room 2, ABC System Admin	0:00 - 23:55 Room Under * Room 2, ABC * System Admin	0:00 - 23:55 Room Under	0:00 - 23:55 Room Under ≁Room 2, ABC ≜System Admin	0:00 - 23:55 Room Under Room 2, ABC System Admin			0:00 - 23:55 Room Under # Room 2, ABC # Room 2, ABC # Room 2, ABC # System Admin
ABC Training Center			7:00 - 17:00 Financial Se						

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

For Facility	For Instructor	For Class Resource	
🛛 🔽 Training Center	🛛 User ID	🖾 Training Center	
Status	Job Title	Resource Type	
Venue	Organization	Serial Number	
Minimum # of Seats	Location	Description	
Maximum # of Seats	Qualified Courses	Quantity on Hand	
VGA Projectors	User Attribute 1		
Elearner PCs	User Attribute 2		
Whiteboards	User Attribute 3		
Overhead Projectors	User Attribute 4		
Expandable	User Attribute 5		
🔲 Has display PC	User Attribute 6		
	User Attribute 7		
	User Attribute 8		
	UAttrExt1		

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

Day Week	Month			
	420 selected	eb 14, 2017	Today	Feb 1.
Add Facility/Instructor/	Resource •••	Mon 13	Tue 14	Wed 15
Venue IETCenter 01 Available Venue 0 5 0 0 0 0	© #			

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:

						OTOTEM					
Resource Planner											
Day Week Mo	onth	Mar 1, 2017	0	Today			< March	2017	Minimi	Create Event	¢ Refresh
Add Facility/Instructor/Resource	ce ····	Sun 5	Mon 6	Tue 7	Wed 8	Thu 9	Fri 10	Sat 11	Sun 12	Mon 13	Tue 14
✓ Room 1 ABC Training Center Available Room 1 0 15 0 0 0 0 0			9:00 - 17:00 Accounting	7:00 - 17:00 Financial Se	9:00 - 17:00 9:00 - 17:00 Digital Citize #Room 1, ABC Jen Gardner,						
Room 2 ABC Training Center Not Available Room 2 0 15 0 0 0 0			0:00 - 23:55 Room Under ⊀Room 2, ABC & System Admin	0:00 - 23:55 Room Under	0:00 - 23:55 Room Under	0:00 - 23:55 Room Under ≁Room 2, ABC ▲System Admin	0:00 - 23:55 Room Under # Room 2, ABC & System Admin			0:00 - 23:55 Room Under #Room 2, ABC & System Admin	0:00 - 23:55 Room Unde #Room 2, AB System Adm

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:

OVERVIEW LEARNING TA	LENT	COMMUNI	CATE	USERS	REPORTS	SYSTEM	1		
Resource Planner	_								
Day Week Month							+ Cre	ate Event	
5 selected	Feb 9, 201	17	8	Today	<	Thu	Feb 9, 2017	>	\$
Add Facility/Instructor/Resource	9:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00
✓ venue TrainingCenter1 Available									
Sone User									
USER1-1 ALL/UNASSIGNED									
LISER2-1	9:00 - 17:00 Workshop Various	o1							

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

OVERVIEW LEARNING	TA	LENT CO	OMMUNICATE	USERS	REPORTS	SYSTEM					
Resource Planner											
Day Week Mont	h									Create Event	
6 sel	ected	Mar 1, 2017	0	Today			< March	2017	>		٥
Add Facility/Instructor/Resource			Mon 6	Tue 7	Wed 8	Thu 9	Fri 10	Sat 11		Mon 13	Tue 14
Alex Parker ALEX PARKER ALLPseudo Corp General Manager (Production)	*			7:00 - 17:00 Financial Se ∢Room 1, ABC Alex Parker ⇔Laptop 1 × 1							
✓ Room 1 ABC Training Center Available Room 1	Ŧ		9:00 - 17:00 Accounting ≁Room 1, ABC ≜Irene Banks,	7:00 - 17:00 Financial Se ∢Room 1, ABC &Alex Parker	9:00 - 17:00 9:00 - 17:00 Digital Citize * Room 1, ABC A lep Gardner Resolve Confl						
ABC Training Center Nof Available Room 2			0:00 - 23:55 Room Under # Room 2, ABC # System Admin	0:00 - 23:55 Room Under 4 Room 2, ABC 4 System Admin	0:00 - 23:55 Room Under	0:00 - 23:55 Room Under # Room 2, ABC System Admin	0:00 - 23:55 Room Under ∢Room 2, ABC &System Admin			0:00 - 23:55 Room Under ≁ Room 2, ABC ▲ System Admin	0:00 - 23:55 Room Under ≁Room 2, AB0 ≜ System Adm
Barry Singer BARRY.SINGER ALL/Pseudo Corp/United Kingd Production Manager (UK)											
BC Training Center				7:00 - 17:00 Financial Se # Room 1, ABC # Alex Parker							

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

OVERVIEW LEARNING TALENT COMMUNICATE	USERS REPORTS S	SYSTEM		
Resource Planner				
Day Week Month				Create Event
6 selected Feb 15, 2017	Today	Feb 13, 20	17 - Feb 17, 2017 🔉	0
Add Facility/Instructor/Resource Mon 13	Tue 14 Jhm	Wed 15	Thu 16	Fri 17
Room 1 Alge Crating Center Available Room 1	9.00 - 17:00 Digital Citizenship ⊀ Room 1, ABC Training Center Alex Parker, Barry Singer ≇Laptop 1 × 1, Projector 1 × 1			
Room 2 ABC Training Center Not Available Room 2				
Alex Parker ALEX PARKER ALL/Paeudo Corp General Manager (Production)	9:00 - 17:00 Digital Citizenship «Room 1, ABC Training Center Adex Parker, Barry Singer &Laptop 1 × 1, Projector 1 × 1			
Barry Singer BARRYSINGER ALLPPeedo CorpUnited Kingd Production Manager (UK)	9:00 - 17:00 Digital Citizenship «Room 1, ABC Training Center Alex: Parker, Barry Singer &Laptop 1 × 1, Projector 1 × 1			
Laptop 1 ABC Training Center	9:00 - 17:00 Digital Citizenship			

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.

				🕼 Set	tings 📔 🕇 Create E	o Refresh
	26 selected	Sep 1, 2016	Today	< AI	ug 29, 2016 - Sep 2, 2	016 🗲
	Search for a user	Mon 29	Tue 30	Wed 31	Thu 1	Fri 2
_	T	y valious	y vanous	y valious	✓Various A Resolve Conflicts	A Resolve Conflicts
	ONE User (USER1-1)		9:00 - 14:00 Personal		10:00 - 18:00 Classroom1 ≁Various ∳FIVE User, ONE	7:00 - 17:00 Event
	100 User1 (USER1_100-1)	-				
	A User (USERA-1)					
	ADMINISTRATOR System (NDADMIN-1)					
	B User (USERB-1)					

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"

Resource Planner				💉 🕇 + Create E	vent 🖗 Refre
420 selected	Feb 14, 2017	Today	Feb 13	, 2017 - Feb 17, 2017 💙	·
Add Facility/Instructor/Resource	Mon 13	Tue 14	Wed 15	Thu 16	Fri 17
Venue IETCenter 01 Available Venue 0 5 0					

- 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

		System Administrator
OVERVIEW LEARNING TALE	NI COMMUNICATE USERS REPORTS SYSTEM	
Resource Planner		
Day Week Month	Create Event ×	🖌 🕂 Create Event 👳 Refresh
6 selected	0	0
Add Facility/Instructor/Resource	Select Event Type Provide Event Details Check Availability Booked Successfully	Fri 17
Room 1 ABC Training Center Available Room 1	Module Session Personal Event Event Eaclifux Booking	
✓ Room 2 ABC Training Center Not Available Room 2	Class Resource Booking	
Alex Parker ALEX PARKER ALL/Pseudo Corp General Manager (Production)		
& Barry Singer BARRY SINGER ALL/Pseudo Corp/United Kingd Production Manager (UK)	Continue Cancel	
ELaptop 1 ABC Training Center		

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.

OVERVIEW LEARNING TALENT	COMMUNICATE USERS REPORTS SYSTEM	
Resource Planner	Create Event ×	
Day Week Month	Select Event Type Provide Event Details Check Availability Booked Successfully	+ Create Event
6 selected Fe	BASIC PROPERTIES	0
Add Facility/Instructor/Resource	Learning Medule *	Fri 17
✓ Room 1	Required	
ABC Training Center Available Room 1	Session Title	
✓ Room 2	Session Code*	
ABC Training Center Not Available	Required	
Room 2	Start Date*	
ALEX.PARKER	Feb 14, 2017 O7:00	
ALL/Pseudo Corp General Manager (Production)	End Date*	
& Barry Singer	Peb 14, 2017	
BARRY.SINGER ALL/Pseudo Corp/United Kingd Production Manager (UK)	Description	
a Laptop 1	Continue Cancel	
ABC Training Center		

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

Resource Planner						
Day Week Month	Create Event				×	+ Create Event
Add Facility/Instructor/Resource ••	Select Event Type Learning Module: Session title: Session Code: Start Date: End Date:	Provide Event Details adhoc Title c10 123 123 Feb 14, 2017 11:05 Feb 14, 2017 17:00	O Check Availability	Booked Successfully		Fri 17
No Display PC Venue01	Resource	125	Availability			
Available Venue01	✔ Venue01 (IEFac01)		✓ Available			
10 50	📥 A a (A)		✓ Available			
0	ADMIN NTS (NTS_A	DMIN)	✓ Available			
0 0 Room Expandable Has display PC	ADMIN_EN Org_Lar	ng (LANG_ADMIN_EN)	✓ Available		÷	
✓ Venue02 IETCenter 01 Not Available Venue02	Back Book	Cancel And Pin Selected Re	sources Cancel			

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.

reate Event				
	Provide Event Details	Chack Availability	Sava Ontions	Bookod Successful
Select Event Type	Flovide Event Details	Check Availability	Save Options	Dooked Succession
New Sessions Ava Enrollment Policy	ailable Notifications may b settings.	be sent to learners who	have indicated inter	est depending on
Save and send	notifications			
⊖Save and do no	t send notifications			
Back Book	Cancel			

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.

OVERVIEW LEARNING TALE	NT COMMUNICATE	USERS REPORTS	SYSTEM		
Resource Planner	Create Event			×	
Day Week Month	Select Event Type	Provide Event Details	Check Availability	Booked Successfully	✓ [*] + Create Event
6 selected Fe	Learning Module:	Digital Citizenship			0
Add Facility/Instructor/Resource	Session title:	20170214			Fri 17
ABC Training Center Available Room 1 ADC Training Center Not Available Room 2 ALEX Parker ALEX PARKER ALLPaeudo Corp General Manager (Production)	Start Date: Start Date: End Date: Location: Instructors: Class Resources:	Feb 14, 2017 09:00 Feb 14, 2017 17:00 Room 1 (RM1) Alex Parker (ALEX PAR Projector 1 xt ,Laptop	RKER),Barry Singer (BARF	Y.SINGER)	
& Barry Singer BARRY SINGER ALL/Pseudo Corp/United Kingd Production Manager (UK)	Onon in Catalon Editor	Class			
BC Training Center		Cluse			

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.

Resource Plann	ner					
Day Week	Month				🖉 + Cr	eate Event 🖉 🕫 Refresh
	7 selected	Jun 26, 2017	O Today	< Jun 2	6, 2017 - Jun 30, 2017 🔉	0
Add Facility/Instructor/F	Resource	Mon 26	Tue 27	Wed 28	Thu 29	Fri 30
✓ Room-London Default			Feam FRom Drag	Root Activity Metting Root Activity, Detault	7.00 - 17.00 Tea Party +Room-London, Default &System Administrator	
 Room-Paris Default 		7:00 - 17:00 C1 ⊀Room-Parts, Default 4Joe Blank, Peter Pan ⇔Projector A × 1. Video Confere.				
Joe Blank		7:00 - 17:00 C1 +Room-Paris, Default Joe Blank, Peter Pan Frojector-A + 1. Video Confere		7.06 - 17:00 Customer Meetup		
Peter Pan USER000007		7.00 - 17:00 C1 *Room-Paris, Default Joe Blank, Poter Pan @Projector-A + 1 Video Confere.				
Projector A Default		7.00 - 17:00 C1 *Room-Pans, Default Alos Blank, Peter Pan Brogector-A +1 Video Confere				
Projector-B		7.00 - 17:00 C1				

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

Resource Plan	ner						
Day Week	Month	Edit Event			×	+ Create Event	¢ Refresh
	7 solocte	-					¢
Add Facility/Instructor/	Resource	Edit Event Details	Check Availability	Booked Successfully		1	Fri 30
✓ Room London Default		Title: Booker:	 Team Weekly Metting System Administrator (NDADMIN) 				
✓ Room-Paris Default		End Date: Comment	Jun 28, 2017 12:00				
Joe Blank		Resource		Availability			
		◀ Room-London (RL)		🛩 Available			
Peter Pan _USER000002							
Projector A Definit		Back Book Cancel	And Pin Selected Resources Cano	lat.			
Projector-B		7.00 - 17:00					

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

T all a Transat			+ Cre	ate Event 🖉 🕫 Refrest
Edit Event			×	4
		-		Fri 30
Edit Event Details	Check Availability	Booked Successfully		
Title	Team Weekly Metting			
Booker:	System Administrator (NDADMIN)			
Start Date	Jun 28, 2017 07:00			
End Date	Jun 28, 2017 12:00			
Location:	Room-London (RL)			
Comment:				
\bigcirc				
≮Room Paris, Default ≜Jon Black, Peter Pan ≜Projector-A × 1, Video Confere				
7:00 - 17:00				
	Edit Event Details Title Booker: Start Date End Date Location: Comment:	Edit Event Details Check Availability Title Team Weekky Metting Booker: System Administrator (NDADMIN) Start Date Jun 28, 2017 07:00 End Date Jun 28, 2017 12:00 Location: Roem-Landon (RL) Comment	Edit Event Details Check Availability Booked Successfully Tiffe • Team Weekly Metting Booker: System Administrator (NDADMIN) Start Date Jun 28, 2017 07:00 End Date Jun 28, 2017 12:00 Location: Roem-London (RL) Comment	Eck Event Details Check Availability Booked Successfully Tife Team Weekly Metting Booker: Systam Administrator (NDADMIN) Start Date Jun 28, 2017 07:00 End Date Jun 28, 2017 12:00 Location: Roem-Londen (RL) Comment:

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

Resource Planner						
Day Week M	onth				2 + Cr	eate Event 🛛 🗢 Refrest
7	bottolica	Jun 26, 2017	Today	لا ک	un 26, 2017 - Jun 30, 2017 👂	4
Add Facility/Instructor/Resource		Mon 26	Tue 27	Wed 28	Thu 29	Fri 30
✓ Room London Default				7.00 - 12 Team #Room #System	7.00 - 17.00 Tea Party #RoomLondon, Default &System Administrator	
✓ Room-Paris Detaut		7.00 - 17:00 C1 *Room-Parts; Detault 4.Joe Blank, Peter Pan #Projector A × 1, Video Confere.				
Joe Blank		7.00 - 17:00 C1 +/Room-Paris, Default #Joe Blank, Peter Pan #Projector-A + 1, Video Contere		7:00 - 17:00 Customer Meetup		
Peter Pan USER0000002		7.60 - 17.60 C1 +Room-Paris, Default Jos Elark, Peter Pan Projector-A + 1 Video Confere				
Cofnull		7.00 - 17.00 C1 #Room-Paris, Default A Joe Blank, Peter Pan #Projector-A × 1 Video Confere				
Projector-B Default		7.00 - 17:00 C1 «Docum Dante Thefault				

• 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.

Resource Planner

Day	Week	Mont	h							- E	Create Event
		7 sel	ected	Jun 27, 201	7	O	Today		<	Tue Jun 27, 2	017 >
Add Facility	/Instructor/R	esource	•••	9:00	10:00	11:00		12:00	13:00	14.00	15:00
✓ Room-L Default	ondon			11:00 - 1. Tear Boom- ▲ System.	Drac	tt.00 - Team ∉Room ≜Syste	13-00 Weekly N-Londor m-Admir	y Metting 1. Default histrator			
✓ Room-F Default	Paris										
Joe Bla	nk 000001										

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

C	Edit Event			×	
le		0	n Destadour		
	Edit Event Details	Check Availab	iity Booked Succ	esstully	
	Title:	Team Weekly Metting			eate E
	Booker:	System Administrator (NDAI	OMIN)		7
d	Start Date:	Jun 27, 2017 09:00			15:0
1	End Date:	Jun 27, 2017 11:00			
	Comment:				
-	Resource		Availability		-
	✓ Room-London (RL)		🖌 Available		
ŀ					
5	Back Book Cancel	And Pin Selected Resources	Cancel		

3. The new start time and end time will be displayed. Press **Close** to proceed.
| C | Edit Event | | | × | | |
|----|--------------------|--------------------------------|---------------------|---|--------|-------|
| Re | Edit Event Details | Check Availability | Booked Successfully | | | |
| | Title | Team Weekly Metting | | | eate E | Event |
| | Booker: | System Administrator (NDADMIN) | | | 7 | > |
| Ad | Start Date: | Jun 27, 2017 09:00 | | | 15.0 | 00 |
| 1 | End Date: | Jun 27, 2017 11:00 | | | 1000 | |
| | Location | Room-London (RL) | | | | |
| | Comment: | | | | | |
| - | | | | | | |
| | | | | | | |
| | | | | | | |
| 4 | Clige | | | | | |

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

Resource	Planne	er											
Day	Week	Month	1									Create Ev	ent
		7 sel	ected	Jun 27,	2017		8	Today		<	Tue Jun 27,	2017	>
Add Facility/Ins	structor/Re	source		9:00	10:00	1	1:00		12:00	13:00	14:00	15:00	ĺ.
✓ Room-Lone Default	don			9.00 - 11.0 Tea We *Room-Lo	0 eekly Metting ondon, Default Administrator	I							
✓ Room-Pari Default	5												
Joe Blank	001												

*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.

Day Week Month		Review Chan	ges		×		
2 selected	Jun 3, 2019	Learning object(s) r	as/nave not been saved	eneral Data Protection	^	🔇 Jun 3, 2019 - Jun	7, 2019 >
Add Facility/Instructor/Resource	Mon 3	Check Availabilit	y			Wed 5	Thu 6
✓ East Room	10:00 - 17:00 Business Integrity	Learning Module:	Business Integrity				
Detault	✓East Room	Session Title:	Summer Session				
✓ West Doom		Start Date:	Jun 3, 2019 10:00 AM				11:00 - 19:00
Default		End Date:	Jun 3, 2019 5:00 PM				General Data Protection Regu West Room
		Resource		Availability			
		≠ East Room (ER)	✓ Available			
		Learning Module: Session Title: Start Date:	Seneral Data Protect Workshop Jun 6, 2019 11:00 AM	tion Regulation (GDPR)			
		End Date:	Jun 6, 2019 7:00 PM				
		Resource		Availability			
		◀ West Room (WF	२)	✓ Available			
					~		
		Save All Change	s Close				

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

NetDimensions Talent Suite	Manage Center			
OVERVIEW LEARNING TA	ALENT COMMUNICATE USERS REF	PORTS SYSTEM		
Resource Planner				
Day Week Month				
2 selected	Jun 3, 2019 😮 Today		K Jun 3, 2019 -	Jun 7, 2019 💙
Add Facility/Instructor/Resource	Mon 3	Tue 4	Wed 5	Thu 6
✓ East Room Default	10:00 - 17:00 Business Integrity ≁East Room			
✓ West Room Default	Save Options	×		11:00 - 19:00 General Data Protection Regulat + West Room
	Notifications may be sent to les on enrolliment policy settings. i Send each learner a notifications Do not send notifications Submit Close	arners who have indicated interest depending		
Review Changes Reset Changes	3			

Conflict Resolution

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

			Your changes have be	en saved.			3
Integrated Instru	uctor Cale	endar					
				C	Settings + Create I	Event 5 Refresh	
	2 selected	Sep 1, 2016	Today		Aug 29, 2016 - Sep 2, 2	2016 🕽	
Search for a user	Q	Mon 29	Tue 30	Wed 31	Thu 1	Fri 2	
ONE User (USER1-1)			9:00 - 14:00 Personal		10:00 - 18:00 Classroom1 ≁Various ∳ FIVE User, ONE	7:00 - 17:00 Event	
TWO User (USER2-1)		10:00 - 18:00 Workshop1 ≁Various	10:00 - 18:00 Workshop1 ≁Various	10:00 - 18:00 Workshop1 ≁Various	10:00 - 18:00 W Classroom1 •Various	10:00 - 18:00 7:00 - 17:00 Event A Resolve Conflicts	

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

			C Settings	+ Create E	vent 🖉 💠 Refresh
2 selec	Schedule C	Conflicts	×	6 - Sep 2, 20)16 🕽
Search for a user	_			hu 1	Fri 2
ONE User (USER1-1)	Workshop1			18:00	7:00 - 17:00
	Start Date:	Mar 1, 2003 10:00 AM		us	Event
	End Date:	Mar 7, 2030 6:00 PM		User, ONE	
TWO User (USER2-1)	Location:	Various		18:00 room1	10:00 - 18:00 7:00 - 17:00 Event
				olve Conflicts	A Resolve Conflicts
	🛔 Event				
	Start Date:	Sep 2, 2016 7:00 AM			
	End Date:	Sep 2, 2016 5:00 PM			
	Edit				

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:

Holio	day Cal	endars			
					Results per Page: 10 V
Showin	o: 1 - 4 of /	1			
GHOWIN	9.1.401-				
					+ Create holiday calendar
	Name				(^
Ф	Hong Kor	ng Holidays			
•	Personal	Holidays			
O	U.K. Holi	days			
÷.	U.S.A Ho	lidays			

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:

New Calendar 1 [Edit]				
Details Training Centers		≠ HIDE	FILTERS		
Year	•				
Filter					
					Results per Page: 10 🔻
Showing: 0 - 0 of 0					
Bulk Action 🔻					+ Add Holiday
Description				Date	^
		There are no i	items to display.		
Showing: 0 - 0 of 0					

Editing Calendars

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

			CTOTELIN	
Holiday Calendars >				
Hong Kong Holidays [E	Edit]			
Details Training Centers				
		HIDE FILTERS		
Year				
2016 •				
Filter				
				Results per Page: 10
				rosans por ruger 10
Showing: 1 - 3 of 3				
Bulk Action 🔻				+ Add Holiday
Description			Date	~
Holiday Day 1			Jul 1, 2016	
🔲 🔅 Holiday Day 2			Jul 27, 2016	
Holiday Day 3			Jul 28, 2016	

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

	Edit Calendar Name	×
	Calendar Name*	
Year All	cCalendar	
All		

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:

Details	Training Centers		
		➡ HIDE FILTERS	
Year		Add Holiday	×
All		Description*	
Filter		1	
		Date* e.g. Oct 26, 2016	Results per Page: 10

Each Holiday can be edited or deleted:

Details	Training Centers			
				▼ HIDE FIL
Year All		•		
Filter				
Showing: 1	- 1 of 1			
Showing: 1 Bulk Actio	- 1 of 1			
Showing: 1 Bulk Actio	- 1 of 1			
Showing: 1 Bulk Actio	- 1 of 1 Description Holiday Day1			

Linking Training Centers

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

Holiday Calendars >			
Details Training Centers			
			Results per Page: 10 -
Showing: 1 - 3 of 3			
Bulk Action -			
Training Center Name	 Venue 	Description	Country
🔲 🔅 a	a Venue	a description	Afghanistan
🗖 🔅 b	b	b	Åland Islands
🗖 🗘 с	c	c	Albania
Showing: 1 - 3 of 3			
 ▶ Back 			

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

Details Training Centers Default Training Centers Training Centers Showing: 1 - 3 of 3 P Buk Action • • • •	Holiday Calendars > CCalendar [Edit]	Search	Selected: 0		
Bulk Action Image: Constraint of Constrain	Details Training Centers Showing: 1 - 3 of 3	Default	» > <	*	Results per Page:
Afghanistan b Save Cancel	Bulk Action Training Center Name	f tc1 btest 44 ~	«	-	Link Training Cere Country
b Mand Islands b c Abanla	🛄 🚯 a				Afghanistan
Save Cancel Albania	🖾 🏟 b				Åland Islands
	🔲 🧔 c	Save Cancel			Albania

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

Calendar (Edit)			
Details Training Centers			
			Results per Page: 10
owing: 1 - 3 of 3			
Bulk Action 💌			
Bulk Action 🔽	 Venue 	Description	 Link Training Center Country
Bulk Action Training Center Name a	▲ Venue a Venue	 Description a description 	 Link Training Center Country Afghanistan
Bulk Action Training Center Name To a Unlink	 Venue a Venue b 	 Description a description b 	Link Training Center Country Aghanistan Aand Islands

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.

#	NetDimensio	ns Talent Suite	Man	age Center			A A A A A A A A A A A A A A A A A A A	🛔 SAPLALA Katrina	Logout
	OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM		
	Assessmei	nt Workflow	Manage	r			+ 0	reate Assessment Work	flow
	Template			Last Updated By		Las	st Updated Date		
	Technical Templ	ate		netdalon		19-	Nov-2012		
	9.3 Demo			netd_ronald		08-	Nov-2013		

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

OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM
Assessment Wo	orkflow Manager	>				
Assessme	nt Workfl	ow Mana	ager			
Template Name	c 📃		0			
+ Add Exam/	Evaluation					
Permissions	Save Delete					

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.

OVERVIEW	LEARNING	TALENT	COMMU	NICATE	USERS	REPORTS	SYSTEM
Assessment Wo	rkflow Manager	>					
Assessme	nt Workfl	ow Man	ager				
Template Name	Workflow1		0				
Exam / Evaluat	ion		C	2		×	
 Pre Course Post Course 	1						
Available Date		days Be	efore 💌 c	ourse end	date 💌		
Assessor	@P ©D	articipant irect Apprais	er				
Reminder Ema	il				4	0	
Send Reminder	r Email for	days Da	aily 💌 a	ifter the av	ailable date		
+ Add Exam/B	Evaluation						
Permissions S	ave Delete						

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.

OVERVIEW	LEARNING	TALENT	COMN	IUNICATE	USERS	REPORTS	SYSTEM
Assessment Wo	orkflow Manage	r					
Assessme	nt Workf	low Man	ager				
Template Name	Workflow1		0				
Exam / Evalua	tion Ex	am Template	for Mobile	Q ()		×	
 Pre Course Post Course 	e						
Available Date		days B	efore 💌	course end	date 💌		
Assessor	© F	^D articipant Direct Apprais	ser				
Reminder Ema	il 📃				R		
Send Reminde	r Email for	days D	aily 💌	after the av	ailable date		
	Evaluation						
+ Auu Examin	Evaluation						
Permissions S	ave Delete						

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

Permission Selector

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

Read Access	Write Access	
Everyone		
Users		
Alon Molina	(NETDALON)	
In addition to the OAII of the follow One of the follow	previously selected users, view permissions will be granted to anyone who meet ving criteria owing criteria	s
Add criteria seled	ctor [:] User Group 💽 Go	
Save Close		

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 Mana ger**. The Repository Manager opens in a separate window.

🦻 Repository Manager - Google Chrome									×
localhost/ekp/servlet/ekp/REPOSI	TORYMANAGER?OPT	IONNAME=REPMANAGER							
Repository Manager			B.	8	*				
Folders Refresh	Overview Repository Manager	enables you to upload and	manage fil	es and	docume	nts stored i	in the	reposi	itory.
Personal Folders Audio and Video Certifications Images Public Shared/Public Folders	Create folder	elete Cut Copy			0				
	Audio and	l Video			AD Sys (NE	vner MINISTRA ⁻ stem DADMIN)	TOR [F	Proper	ties]
	📄 🖿 Certificati	ons			AD Sys (NE	MINISTRA stem DADMIN)	TOR [F	Proper	ties]
	🔲 🖿 Images				AD Sys (NE	MINISTRA ⁻ stem DADMIN)	TOR [f	Proper	ties]
	📄 🖿 Public				AD Sys (NE	MINISTRA ⁻ stem DADMIN)	tor [f	Proper	ties]

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.)

🦻 Repository Manager - Google Chrome		- 🗆 X
Iocalhost/ekp/servlet/ekp/REPOSIT	ORYMANAGER?OPTIONNAM	IE=REPMANAGER
Repository Manager		
Folders Refresh	Overview This form allows you to modif you to share the folder/file wit	y the file/folder name, description, and permissions. Permissions allow th other users. By default, your files are not shared.
Personal Folders Audio and Video Certifications Mages Public	Folder Properties Folder Name:	ISEC001 InfoSec Mod1
Shared/Public Folders	Description:	Information Security Module
	Folder permissions are inherited by subfolders.:	
	Permissions	Back to Repository

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**.



This folder is empty.

The file selection page opens (shown below).

🦻 Repository Manager - Google Chrome			—	\times
localhost/ekp/servlet/ekp/REPOSIT	ORYMANAGER?OPTIONNAN	IE=REPMANAGER		
Repository Manager			8	
Folders	Overview			
Personal Folders Audio and Video Certifications Images ISEC001 InfoSec Mod1 Public	Upload File:	Choose File No file chosen		
	Enter description informatior	to facilitate subsequent searching and	retrieval of this file.	
Shared/Public Folders	Description:			
	4	Upload Back to Repository		

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.

Create folder Upload	Replace Delete Cut	Copy Paste							
Folder Name: ISEC001 InfoSec Mod1									
Name	Description	Owner							
1 Up One Level									
💽 🖺 Read Me -		ADMINISTRATOR							
Working with	Docker Read Me PDF	System [Propert	ies]						
Docker.pdf		(NDADMIN)							

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.

E-mail Template Ed	tor 🖸 🖪 🕨 🤋 🕱
Templates ⊕ System Default ⊕ User Templates	Message E-mail Template Editor First, select an E-mail Template on the left panel for editing. Click the Create button on the top panel to create a new E-mail Template.

- 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.
 - 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.

	То	CC	Omitted
Approver	0	0	۲
Participant	O	0	۲
Direct Appraiser	0	0	۲
HR Manager	O	0	۲
Course Specific Instructor(s)	0	0	۲
Default System Approver	O	0	۲
Default System User/Administrator	0	0	۲
Appraiser	O	0	۲
Super-Appraiser	O	0	۲
Organization Approver	O	0	۲
Specific User	O	0	۲
External E-mail	0	0	0

using the drop-down lis Language	t below. English		
Predefined Message	Default Enrollment Approval Re	minder •	
Subject			
NOTE: For securit user e-mails.	ty reasons, the external a	approval link is NOT	shown
Parameters Additiona	I Charges	 Append To Me 	ssage
Attachments			
Select an attachment f	rom the repository.		
Assign attacriment	03 5.55		
Remove assigned attac	chment(s)		
Attach Learner's Pre	work and Standard References		
Attach Learner's Pre	work and Standard References and Training Center Maps		
Attach Learner's Pre	work and Standard References and Training Center Maps		
Attach Learner's Pre Attach Facility Map Permissions Upon creation, default	work and Standard References and Training Center Maps permissions will be granted.		
Attach Learner's Pre Attach Facility Map Permissions Upon creation, default Logical Domain: Globa	work and Standard References and Training Center Maps permissions will be granted. al Default		

Bottom half of the email template

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

Enter a new i parameters a	message or select text from one of the predefined messag re indicated as {keyword} text, and others may be adde	es (the text may be altered for this s d using the drop down list below.	pecific message). Substitution	n
Language		0	English	•
Predefined N	Aessage .	Default E	Enrollment Approval Reminder	-
Subject		9		
NOTE: For	security reasons the external approval link	is shown in CC user emails.	4	
		5		
Parameters	Additional Charges 💽 💽	pend to Message		

	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".

Attachments	
Select an attachment from the repository.	
Assign Attachment	*
Remove assigned Attachment(s)	
	~
Attach learner's Pre Work and Standard References	
Attach facility map and training center maps	

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".

elect an attachment from the repository.	
Assign Attachment	A
Remove assigned Attachment(s)	

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.

File Attachment:	Map_YYY.jpg Map_XXX.jpg
Subject:	Enrollement

Course MOD-0004 has been enrolled. Please find below the following details:

Facility Code: FAC_1
Training Center Contact: 123-4567
Training Center Desc: This is
Training Center Direction: Exit A
Training Center Name: Training Center ABC
Training Center Venue: Block 1, XXX Road

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".

E-mail Template Editor	
Templates System Default System Default System Default System Default System Default System Default Approval Expired Notification Copy of-Copy of-Email Reference Copy of-Email Reference Copy of-Email Reference Email Reference Not-Yet-Accessed Reminder Session Completion Notification SUBMIT AGREED APPRAISAL SUBMIT PENDING APPRAISAL SUBMIT REVIEW APPRAISAL SUBMIT STARTED APPRAISAL SUBMIT STARTED APPRAISAL	Parameters Additional Charges Append to Message Attachments Select an attachment from the repository. Assign Attachment Remove assigned Attachment(s) Attach learner's Pre Work and Standard References Attach facility map and training center maps Permissions Meta Data Created By: Date Created: Jul 5, 2012 10:02 AM CST Last Updated: Jul 17, 2012 11:06 AM CST Save Create a Copy Cancel Usage Delete

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.

Settings			
User Preferences	Orgs My Profile Change pa	escont Acco	ota Terra d'Use
Admittada			
Skin Selection	1/15-43		The skin selectors at the left determine the scinen layout, tackground, colors, and rotated user interface characteristics.
Language	English	•	Language for the Menu Messages and Labels
Time Zone	(GMT+08.00) Asia/Shar	glai Ova 💽	The time game used to display dates and times relative to your location. Please choose the SDADARD game, as buylight sample time will be accounted for automatically to those time games that make use of this surcept.

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.

To	CC	Omitted
0	0	0
	0	0
	0	0
0	-0	0
0	0	
0	0	
0	0	
0	0	
0	0	0
0	0	
0	0	
0	0	0
.) to separate multiple addresses		
	To O O O O O O O O O O O O O O O O O O O	To CC O O O O O O O O O O O O O O O O O O

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 None be changed to

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.

E-mail Template Editor	0 (
Templates Default Certification Expiration Reminder Default Certification Expiration Reminder Default Enrollment Approval Reminder Default Enrollment Approved Request Default Enrollment Confirmation Default Enrollment Confirmation Default Enrollment Pending Default Enrollment Waitlisted Default Start-of-Session Reminder User Templates	Predefined Message Default Enroll Subject Enrollment Con NOTE: For security reasons, the e e-mails. {module_completion_deadline}	ment Approval Reminder 💌 firmation external approval link is shown in CC user
	Module Completion Deadline Join Date Launch appraisal link SLinked Goal Program Name Alinked Organizational Goal Title	Parameters Append to Message
	Flocation Gode FModule Completion Deadline Needs Hotel Accommodation (Y/N) New Session Notify E-mail (about charged Cost Center) Old Session Organizational Goal Title Participant First Name Participant Last Name Performance Goal Title Thone Postal Code/ZIP Preferred Date Preferred Location	E current template, click Permissions

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.

Message			
Enter a new Indicated as Language Predefined N Subject NOTE: For Dear (pa You have administ Reason:	message or select text from one of the predefined m (keyword _) text and others may be added using the English Message,	ess: dro	ages (the text may be altered for this specific message). Substitution parameters are p-down list below. I Reminder • on link is shown in CC user e-mails. pu have any queries, please contact our learning systems
	Reason for Withol away Refund Amount Refund Amount (Optional Payment Items) Report File Name Report URL Request Date Reset Password	Ţ	
Parameters	Reason for Withdrawal		Append to Message

Reason for Withdrawal parameter on email template editor

Message			
Enter a new message or select text from	one of the predefined messages (the text may be altered for this specific message). Substitution parameters are		
indicated as {keyword} text and others	may be added using the drop-down list below.		
Language	English		
Predefined Message	Default Enrollment Approval Reminder		
Subject	Course Withdrawal Notification		
NOTE: For security reasons, th	he external approval link is shown in CC user e-mails.		
<pre>Dear {participant_name},</pre>			
You have been withdrawn from	{course_title}. If you have any queries, please contact our learning systems		
administrator ({default_system_approver})).			
Reason: {reason_for_withdrawal}			
Thank you for your attention.			

Adding the Reason for Withdrawal parameter on an email template

Message Content			
Reply	New Message	Delete	Back
From:	ADMINISTRATOR Sys	tem (ndadmin)	
To:	ADMINISTRATOR Sys	tem (NDADMIN)	
CC:	(not specified)		
Date:	Feb 10, 2014 4:19 PM	CST	
File Attachment:	(not specified)		
Subject:	Course Withdrawal Not	tification	
*External recipients are not shown.			
Dear User One,			
You have been withdrawn from ow. If y	ou have any queries, please contac	ct our learning systems administrator (System	Administrator).
Reason: Withdraw reason			
Thank you for your attention.			
This message is intended only for use or notified that any use or dissemination of deleting this message from your system.	the addressee and may contain in this communication is strictly prohib	formation that is privileged and confidential. If y ited. If you have received this communication i	ou are not the intended recipient, you are hereby n error, please notify us immediately by replying and

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.

Home	Training Records	Catalog	Dashboard	Career Development	Review	Communicate	Teach	Manage
Mana	ge > System Adminis	tration Ma	nager > Systen	n Support Functions >				
Res	et system de	efault e	e-mail te	mplate langua	age			

Please note that any previous changes to the system default e-mail templates will be lost.



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

Home Training Records Catalog Dashboard Career Development Review Communicate Teach Manage

Manage > System Administration Manager > System Support Functions >

Reset system default e-mail template language

The system default email template has reset to language English

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.

E-mail Template Editor	0 6 9	X		
Templates 2				
System Default	ENGLISH Add New Language			
APPRAISAL WORKFLOW TRAINING REQUEST Approval Expired Notification	Save Create a Copy Cancel Usage			Delete
Copy of SUBMIT AGREED APPRAISAL	Name Copy of SUBMIT AGREED APPRAISAL			_
 Not-ret-Accessed Reminder Session Completion Notification 	Sender			
 SUBMIT AGREED APPRAISAL SUBMIT PENDING APPRAISAL SUBMIT REVIEW APPRAISAL SUBMIT STARTED APPRAISAL 	Specify the sender of the email.			
	ADMINISTRATOR System (NDADMIN)			
	Recipients			
	Select from the list below the intended recipients for thi	s message.		Omitted
	Approver	0	0	a
	Participant		0	0

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

E-mail Template Editor		4 ? X
Templates		
System Default	ENGLISH Add New Language	
User Templates APPRAISAL WORKFLOW TRAINING	Save Cancel	Delete
REQUEST	Message	
Copy of-SUBMIT AGREED APPRAISAL Not-Yet-Accessed Reminder	Enter a new message or select text from one of the this specific message). Substitution parameters are added using the drop down list below.	Predefined messages (the text may be altered for e indicated as [keyword] text, and others may be
 Session Completion Notification SUBMIT ACREED APPRAISAL 	Language	Arabic (Saudi Arabia)
SUBMIT PENDING APPRAISAL	Predefined Message	Default Enrollment Approval Reminder
SUBMIT REVIEW APPRAISAL SUBMIT STARTED APPRAISAL	Subject	
	NOTE: For security reasons the externa emails.	approval link is shown in CC user
	Additional Charges	Append to Message
	Save	Delete

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.

Permiss	ions		1
To specif	ly which users and	organizations can access the current template, click Permissions	
Save	Create a Copy	Cancel Usage	Delete

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**.

E-mail Template Editor		2 X
Templates System Default User Templates	E-mail Template Properties This form allows editing of the selected template. Note: system de not allowed to be deleted. Save Create a Copy Cancel Usage Delete All	fault templates are
	Name NetDimensions Test	
	Sender	
	Specify the sender of the email.	
	Recipients	
	Select from the list below the intended recipients for this message	Sec. Sec. 1
	Approver O Participant O Direct Appraiser O	CC Omitted

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

E-mail Template Editor	
Templates System Default User Templates	E-mail Template Properties This form allows editing of the selected template. Note: system default templates are not allowed to be deleted. Save Create a Copy Cancel Usage Delete Template copied and saved (note: default permissions were granted), you can continue to make modifications

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.

E-mail Template Editor	
Templates System Default User Templates ACME Default Enrollment Approved Notification Alain Enrolment Approval Reminder Alain Enrolment Approval Reque Alain Enrolment Approval Reque Org Approver	E-mail Template Usage The listing below identifies all references to this e-mail template. You are not allowed to remove an e-mail template if it is still being used by other part of the system. Enrolment Policy References ULGC SJP enrollement
 Appraisal Start Approval Expired Notification 	System References
Award Certificate BCD Enrolment Confirmation Certificate of completion	No references in this category were found.
Completion Certificate Conja de	Certification References
Copy of Cape Default Enrolment Confirmation Copy of Appraisal Start	No references in this category were found.
Copy of-Default Start of Session	Organisation Level Welcome References

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.

E-mail Template Editor			8 8	L.
Templates	ENGLISH (Default) Add New Lange	uage	_	
ACME Default Enrollment Approved Notification Alain Enrolment Approval		Delete All		
Reminder Alain Enrolment Approval Request	Name ACME Default Enrollment Approv	ved Notification		
Alain Enrolment Approval Request	Sender			
Appraisal completion Appraisal Start	Specify the sender of the email.	4 0	1	
Award Certificate	Recipients			
 BCD Enrolment Confirmation Certificate of completion 	Select from the list below the intended r	recipients for this mess	age.	
Completion Certificate Copia de-	Approver	To ()	CC O	Omitted
Copy of Cape Default Enrolment Confirmation	Participant Direct Appraiser	0		•
 Copy of-Appraisal Start Copy of-Default Start of Session 	HR Manager Course Specific Instructor(s)	0	0	

5.Confirm to delete

Searching for E-mail Templates

To search for an existing e-mail template:

1.Click on the Search icon.

Templates B-C System Default Message	
E-mail Template Editor: First, select an E-mail Temp button on the top panel to create a new E-mail Temp	plate on the left panel for editing. Click the Create late.

2. The Template Search screen appears.

E-mail Template Editor					
Perpulates System Default Default Certification Expiration Reminder Default Course Withdrawal Notification Default Enrollment Approval Request Default Enrollment Approval Request Default Enrollment Approval Recepted Default Enrollment Pending Default Enrollment Valitated Default Enrollment Valitated Default Enrollment Notification Default Enrollment Notification Cogr of Default Enrollment Confirmation Not Yet/Accessed Reminder Session Completion Notification SUBMIT Recepted Reminder SUBMIT APRECA PPRAISAL SUBMIT TENDING APPRAISAL SUBMIT TENDING SUBMIT TENDING APPRAISAL SUBMIT TENDING SUBMIT SUBMIT SUBMIT SUBMIT SUBMIT SUBMIT SUBMIT SUBMIT SUBMIT SUB	Template Search Perform a search based on the Template attributes. You may enter a partial name in the name field to perform a case-insensitive wildcard search (with " as the optional wildcard character). For example:				

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.

E-mail Template Editor	٥	B ?
Templates	Results of Template Search	
 Default Certification Expiration Reminder Default Course Withdrawal Notification 	Show (1 - 1 of 1)	Page 1 💌 of 1
Default Enrollment Approval Reminder	Name	Subject
Default Enrollment Approval Neduest Default Enrollment Approval Neditication Default Enrollment Confirmation Default Enrollment Denied Notification Default Enrollment Vending Default Enrollment Vending Default Enrollment Vending Default Start of Session Reminder Default Start of Session Reminder Default Start of Session Reminder Default Europhases AppravBaL WORKFLOW TRAINING REQUEST	Cancel Session Notification	Edited Enrollment Pending Notification

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.



Mail Box

Bu	k Action	¢ Refresh (+ Create
	Subject	From
	Task Approval Reminder(Feb 5, 2013)	SANTOS Vina (empno005)
	MTask Approval Reminder(Feb 5, 2013)	SANTOS Vina (empno005)
	Enrollment Approval Request(Jan 28, 2013)	ADMINISTRATOR System (ndadmin)
	Enrollment Approval Request(Jan 28, 2013)	ADMINISTRATOR System (ndadmin)
	Enrollment Approval Request(Jan 28, 2013)	ADMINISTRATOR System (ndadmin)
	Enrollment Approval Request(Jan 28, 2013)	ADMINISTRATOR System (ndadmin)
MEnrollment Approval Request(Jan 28, 2013) ADMINISTRATOR S		ADMINISTRATOR System (ndadmin)
	ADMINISTRATOR System (ndadmin)	
Enrollment Confirmation(Jan 25, 2013) ADMINISTRATOR System (nda		ADMINISTRATOR System (ndadmin)

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

Send A Message

send ext	ternal mail (e.g. internet), your external e-mail address must be entered in the system. This can be done in Personalize -> User Administration.	
nd Detai	ails	
rom:	MOLINA Alon (netdalon)	
):	Select	
2:	Select	
ıbject:		
00000		
เธลบูย		
11	U ABC Font Family • Font Size • 1 Ξ 1 Ξ A • 1 → wm.	

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.

Select a specific configuration category from the drop When you click Save, the current customization prop	p-down menu below. Subsequent screens allow you to edit the prop perties file is updated.	erties associated with the s	selected cat	egor
viter you click Save, the current customization prop	lerites life is upuated.			
Select A Category				
Online payment				
You must save all changes before selecting anoth	her category			
······································				
Smille payment				
Enable online payment			4.6	0
name payment nable online payment Enable shopping cart			4.6	0
Enable online payment			4.6	2
Enable online payment Enable shopping cart Payment plugin URL			4.6 6.3 6.0	0
Enable online payment Enable shopping cart Payment plugin URL			4.6 6.3 6.0	0
Enable online payment Enable shopping cart Payment plugin URL Payment plugin key			4.6 6.3 6.0 6.0	0

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

Mait				
Include iCalendar attachments in enrollment and approval confirmation messages		4.6	0	
Deliver iCalendar Notifications as Email Attachment(s)		5.6	0	
Add Course Description To iCalendar Attachment		5.6	0	
Request responses in iCalendar		7.1	?	
New User Welcome E-mail:	•	4.6	0	
Forum Undate Notification Email:	N	47		

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 *{re set_password}* placeholder in the New User Welcome E-Mail. Note that the *{reset_password}* placehold er 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.

User Editor)8	x
Organization	04 Learner learner	_04 Active
Drganization A	Profile User Groups Supe	ervises Status Records/Transcript
Organization B UNASSIGNED	Meta Data	
	Created by:	JULIA GEISEL Admin (jgeisel_admin)
	Date User ID Created:	Mar 1, 2017 2:36 PM CET
Refresh	Last Updated By:	JULIA GEISEL Admin (jgeisel_admin)
	Last Updated:	Mar 1, 2017 2:42 PM CET
	User Statistics	
	General user session-related stati logged out properly.	stics. Note that the total and average session times only include sessions where the user
	Last Log-In:	Unknown
	Last PW Change:	Unknown
	Last Auto-Enroll Scan:	Unknown
	New User Welcome E-mail:	Unknown Send Welcome Email Now
	Last Offline Auto-Enroll Scan:	Unknown
	Logins:	0

Or manually run the Welcome Email Task.

-	~	Notice Expired Questions Task	Daily	Abbusanter	Feb 15, 2017 3.02 AM INCT	Active
	0	Send Personal Goal Reminder	Daily	Application	Feb 15, 2017 3:02 AM HKT	Active
	0	Set Session Status To Ended	Daily	Application	Feb 15, 2017 3:02 AM HKT	Active
	۰.	Standard Daily Tasks	Daily	Application	Feb 15, 2017 3:02 AM HKT	Active
	o.	Suspend Inactive Users	Daily	Routine Administration	Feb 15, 2017 3:02 AM HKT	Active
	Q.	Synchronize Training History from GoToTraining	Daily	Application	Feb 15, 2017 3:02 AM HKT	Active
	ø.	Update Question Count Usage Task	Daily	Application	Feb 15, 2017 3:02 AM HKT	Active
8	۰.	Web Catalog Refresh	Daily	Routine Administration	Feb 15, 2017 3:02 AM HKT	Active
	0	Welcome Email Task	Daily	Application	Feb 15, 2017 3:02 AM HKT	Active
_						

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.

Enrolment Policy Editor	00000	? X	
Policies	New Enrolment Policy		
Wasser Step EnROLLMENT POLICY Wasser Endoment policy WASP Enrolment policy Wasser Enrolment Policy	Enrofment Policy Details Select the desired e-mail workflow and sper Policy Name:	cific messages using the properties below.	
BEO Travel Simple 1-step enrolment policy Course specific approver Does specific approver DeS-SIP Workshop Training Policy DEFAULT POLICY DEFAULT POLICY DEFAULT TWO STEP ENROLLIMENT POLICY DEFAULT NO STEP ENROLLIMENT POLICY DEFAULT STEP ENROLLIMENT POLICY	The confirmed enrolment e-mail notification Send Enrolment Confirmation for Group Enrolment? Enrolment Confirmation:	can be turned on or off, select your option belo Send Enrolment Confirmation for Self Enrolment?	w. Send Enrolment Confirmation for Auto Enrolment?
HTO STEP EINROLLIMELT POLICY - ORG PAYS Sone Step Policy Ifs- One Step Policy 144 withdrawal Gas Policy Ifs- One Step Policy 144 withdrawal Ifs-One Step Policy Job Policy	Enrolment Pending Notification: Waitlisted Notification: Withdrawal Notification: Approved Notification: Denied Notification: Session Transfer Notification:		
ILESO Ditte Enrolment Policy ILego Enrolment Policy ImModule Training Policy ImModule Training Policy Immediatest Immediatest Immediatest Immediatest Immediatest Immediatest Immediatest	Policy Remarks:	noval	Å
- 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.

Listing Session Properties	Define Enrollment Policy	
Module Properties	Catalog for Testing	
Catalog for Testing (catalog001)	Enrollment Security	
	Envolvment Security allows you to control	which users are allowed to appell for this modula/moreney. If public access is
Catalog Setup	checked below, all users can enroll in this	mich users are anowed to enroll for his modulerprogram. It public access is module. Otherwise, the user is checked for membership in any one of the followin
1 1 Define Module Properties	access control lists.	
1.2 Enter Cost Information	100	
1.3 Enter Objectives	This module/program currently allows	public access
1.4 Enter References	Allow user to WITHDRAW	
1.5 Preview	Prompt user for reason for the withd	rawal
1.6 View Usage Statistics	Allow user to mark COMPLETED	
1.7 Indicated Interest List	Allow status changes to be made at a	nutime (e e impore standard business rules)
1.8 Associated Programs Listing	Anow status changes to be made at a	ny unite (e.g. ignore standard odsiness i dies)
1.9 Virtual Archive	If the allow re-apprilment checkbox is che	that then a user baking one or more neurious encolments with overall status
Assess Castral/Enrollment Castral	COMPLETED or FINISH USING is allowed	to enroll in this course again.
24 Define Medula Control	O Disallow Re-enrollment	174
2.1 Denne moudle becony	Allow re-enrollment	
2.2 Assign Freequisites 2.3 Accian Exam(Cartification(Evaluation	Contraction of the contraction o	
	In some cases, a course that might have t	een taken by a student previously will need to be re-taken after a period of time.
2.5 E-mail Preferences Setup	The history expiration window is used to sp value is set to "30" then a student who tool	ecily the number of days after which the student may re-enroli. For example, if the this course more than 30 days ago will need to re-take this course.
Knowledge Center Setup	History Expiration Window: 0	daw(s)
3.1 Setup Options		
		Currently Allowed Organization(s)
Launch Setup	Select Organization Constraint(s)	
4.1 Define Launch Properties		

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.

Catalog Editor	Save	
----------------	------	--

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.

Enrollment Policy Editor	00800	8 9 X	
Policies 🔪			
🖬 🕄 Approval Step A	Enrollment Policy Summary		
Enrollment Policy Summary	Approval Step A		
Edit withdrawal details	Enrollment Policy Details		
Edit Additional Enrollment Information Edit steps ordering	The settings below represent a summary of the steps and p particular policy.	roperties set for this	
(Add a step) Copy of DEFAULT TWO STEP ENROLLMENT	Policy Name Policy Remarks	Approval Step A	
	Send Enrollment Confirmation for Group Enrollment?	Yes	
DEFAULT TWO STEP ENDOL I MENT POLICY	Send Enrollment Confirmation for Self Enrollment?	Yes	
ADDITION OF THE PRINCIPALITY OF THE	Cond Enrollmont Confirmation for Auto Enrollmont?	Vac	

2. The Approval Step Details screen appears.

Policies	New Approval Step			
DEFAULT POLICY	incollement Delice (
DEFAULT TWO STEP ENROLLMENT POLICY	Annowal Step Details			
Crioliment Policy A Enroliment Policy Aurmany Edit policy defails Edit policy defails Edit Additional Enrollment Information	Apolicy step can be configured to o the approver prior to the expirat Step Name:	expire with a particular action, and can have remind ion.	ler e-mail messag	as sent
Edit steps ordering	Approver Selection Type:	Use Default System Approver		
 (Add a step) 	Designated Approver:		8 0	
	Approval Request		09	
	Click if you don't want this step) to expire		
	Expiration period:	5 days after this step be	gun	
	Action taken when step has	approve		
	expired. Expiration Notification:		80	
	Reminder day	0 days before this step e	expires	
	Approval Reminder.		0 9	
	Step Remarks:			
j	f this step is manual, it is assum step has no associated business	ed that administrators will follow-up on requirement logic applied.	s. Hence, internally	this
	Click if this is a manual step			
,	All adjacent parallel steps are exe	cuted concurrently.		
	This step is in parallel with the	e adjacent step(s)		
i	Prompt for additional information	in each approval step.		
	Charged Cost Center			
	Email to whom notification reg Notify Email:	arding the charged cost center is needed	N	
	Note: Email will be sent to the em he recipients that are selected fir	all address that is entered by the approver during a on the email template.	oproval step, in add	tition to

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.

Assig	n approvei	r to			
Descrip	tion				
Perform to copy if	a search to gene t into the 'Selectio	erate a list of items in ons' panel. When you	the 'Available Choices' panel. 8 have completed your selection	elect one of the items listed and click the single click the 'OK' button.	arrow (e.g. >) butto
Search (Criteria				
The sea	rch result list only	y displays the first 1,0	00 rows. Check here to switch	between horizontal/vertical screen layouts: 🗵	
User ID	1		Given Name:	Family Name:	
Role:	All	•	Organization:	Select	
			User Group:	Select	
# Record	ds Retrieved: 0				
Soloctio	ne				
Jerecuu	113				
			ОК Сал	cel	

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

If this step is manual, it is assumed that administrators will follow-up on requirements. Hence, internally this step has no associated business logic applied.

Click if this is a manual step 🔲

All adjacent parallel steps are executed concurrently.

This step is in parallel with the adjacent step(s) 🔲

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.

Enrollment Policy Editor	(D & + ? X
Policies	Approval Step D	etails
DEFAULT POLICY Enrollment Policy Summary Edit policy details Edit vithdrawol details	Save DEFAULT POLICY	Delete
Edit Additional Enrollment Information Edit steps ordering	Approval Step Details A policy step can be confi messages sent to the ap	gured to expire with a particular action, and can have reminder e-mail prover prior to the expiration.
 Approval Step 1: Sample Step (Parallel Step) 	Step Name:	Sample Step
(Add a step) DEFAULT TWO STEP ENROLLMENT POLICY	Approver Selection Type:	Use Default System Approver
B-C My policy B-C New Policy B-C test	Approval Request:	STUDENT New (VERONICA)

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.

E-mail Template Editor	Select	C & . ? X
		UY.

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.

Enrollment Policy Editor	00000
Policies	Policy Steps Ordering
POLICY	Enrollment Policy A
DEFAULT POLICY	Policy Steps Ordering
OFFAULT TWO STEP ENROLLMENT POLICY Genoliment Policy A Enrollment Policy Summary	Specify the sequence in which the configured steps will be applied during the enrollment process by clicking on the arrows below. Approval Step 1: Step one: For approval
Edit policy details Edit policy details Edit withdrawal details Edit Additional Enrollment Information Edit steps ordering Approval Step 1: Step one: For approval	Approval Step 2: No expiration
 Add a step) 	

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.

Policies	Envolument Policy D	otalla	
Copy of DEFAULT TWO STEP ENROLLMENT	Enrollment Policy D	etalis	
DEFAULT POLICY	DEFAULT TWO STEP ENROLLM	IENT POLICY	
DEFAULT TWO STEP ENROLLMENT POLICY	Enrollment Policy Details		
Enrollment Policy Summary Edit policy details	Select the desired e-mail workfl	ow and specific messages using the properties	below.
Edit withdrawal details Edit Additional Enrollment Information	Policy Name:	DEFAULT TWO STEP ENROLLMENT POL	ICY
Edit Steps ordering Approval Step 1: Direct Appraiser Approval	The confirmed enrollment e-ma	il notification can be turned on or off; select your o	option below.
 Approval Step 2: Course Approver (Add a step) 	Send Enrollment Confirmation Enrollment?	for Group Send Enrollment Confirmation for Self Enrollment?	Send Enrollment Confirmation for Aut Enrollment?
B C Enrollment Policy A		6	
	Enrollment Confirmation:	Default Enrollment Confirmation	04
	Enrollment Pending	Default Enrollment Pending	0 4
	Waitlisted Notification:	Default Enrollment Waitlisted	0 4
	Withdrawal Notification:	Default Course Withdrawal Notification	R 0
	Approved Notification:	Default Enrollment Approved Notification	
	Denied Notification:	Default Enrollment Denied Notification	0 4
	Policy Remarks:	This is a system policy that may two-level approvals.	be used for
	Allow Approval Withdrawal		
	Prompt user for reason f	or the withdrawal	
	Consider organization-level	payment plan options	
	Parallel Approval Steps		
	First response determines	s outcome	
	All parallel steps must su	cceed	
	To specify which users and org	anizations can access the current template click	Permissions

- 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.

	09800	4 7 X	
Policies 🔪	Withdrawal Details		
Copy of DEFAULT TWO STEP ENROLLMENT	Pricial and potana		
	Enrollment Policy A		
CODEFAULT TWO STEP ENROLLMENT POLICY	Withdrawal Policy details		
Encollment Policy A	Enter Withdrawal details below.		
 Enrollment Policy Summary 			
Edit policy details Edit with drawel details			
Edit Additional Enrollment Information			
 Edit steps ordering 			
 Approval Step 1: Step one: For approval 	Cost/Enrollment Information		
 (Add a step) 	Specify the refund amount below as a percentage of the	full cost to be refunded/credited to the learner upon w	ithdrawal from a course
(Add a step.)	Specify the refund amount below as a percentage of the within a certain number of days.	full cost to be refunded/credited to the learner upon w	ithdrawal from a course
 (Add a step) 	Specify the refund amount below as a percentage of the within a certain number of days. Number of days before module start date	full cost to be refunded/credited to the learner upon w	ithdrawal from a course
 (Add a step.) 	Specify the refund amount below as a percentage of the within a certain number of days. Number of days before module start date 5 or more days	full cost to be refunded/credited to the learner upon w % of course fee refunded 10% refunded	ithdrawal from a course Delete
 (Add a step.) 	Specify the refund amount below as a percentage of the within a certain number of days. Number of days before module start date 5 or more days 10 or more days	full cost to be refunded/credited to the learner upon w % of course fee refunded 10% refunded 50% refunded	ithdrawal from a cours Delete Delete
• (Add a step)	Specify the refund amount below as a percentage of the within a certain number of days. Number of days before module start date 5 or more days 10 or more days	full cost to be refunded/credited to the learner upon w % of course fee refunded 10% refunded 50% refunded	Athdrawal from a course Delete Delete Add>>
• (Add a step)	Specify the refund amount below as a percentage of the within a certain number of days. Number of days before module start date 5 or more days 10 or more days Optional Payment Nems	full cost to be refunded/credited to the learner upon w 6 of course fee refunded 10% refunded 50% refunded	Athdrawal from a cours Delete Delete Add >>
• (Add a step)	Specify the refund amount below as a percentage of the within a certain number of days. Number of days before module start date 5 or more days 10 or more days Optional Payment Nems Specify the refund amount below as a percentage of the within a certain number of days.	full cost to be refunded/credited to the learner upon w % of course fee refunded 10% refunded 50% refunded full cost to be refunded/credited to the learner upon w	Athdrawal from a course Delete Add >>
 (Add a step) 	Specify the refund amount below as a percentage of the within a certain number of days. Number of days before module start date 5 or more days 10 or more days Optional Payment Nems Specify the refund amount below as a percentage of the within a certain number of days. Number of days before module start date	full cost to be refunded/credited to the learner upon w % of course fee refunded 10% refunded 50% refunded full cost to be refunded/credited to the learner upon w % of accommodation fee refunded	Athdrawal from a course Delete Deleta Add >>
(Add a step.)	Specify the refund amount below as a percentage of the within a certain number of days. Number of days before module start date 5 or more days 10 or more days Optional Payment Items Specify the refund amount below as a percentage of the within a certain number of days. Number of days before module start date 5 or more days	full cost to be refunded/credited to the learner upon w % of course fee refunded 10% refunded 50% refunded full cost to be refunded/credited to the learner upon w % of accommodation fee refunded 10% refunded	Athdrawal from a course Delete Add >> Athdrawal from a course Delete

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.

Enrollment Policy Editor	00800	1 4 7 X	
Policies Copy of DEFAULT TWO STEP ENROLLMENT POLICY Copy of DEFAULT Copy of DEfault	Withdrawal Details Enrollment Policy A Withdrawal Policy details Enter Withdrawal details below. CostEnrollment Information Specify the refund amount below as a percentage of th within a certain number of days.	ne full cost to be refunded/credited to the learner upon w	ithdrawal from a course
	Number of days before module start date	% of course fee refunded	
	5 or more days	10% refunded	Delete
	10 or more days	50% refunded	Delete
			<< bba
	Optional Payment Items Specify the refund amount below as a percentage of th within a certain number of days.	ne full cost to be refunded/credited to the learner upon w	ithdrawal from a course
	Number of days before module start date	% of accommodation fee refunded	
	5 or more days	10% refunded	Delete
			Add >>

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.

Enrollment Policy Editor	0080	4 ? X	
Policies	Mithdrawal Details		
Copy of DEFAULT TWO STEP ENROLLMENT	Printing and Decision		
POLICY	Enrollment Policy A		
DEFAULT TWO STEP ENROLIMENT POLICY	Withdrawal Policy details		
CEnrollment Policy A	Enter Withdrawal details below.		
 Enrollment Policy Summary 			
Edit policy details			
Edit withdrawal details Edit Additional Enrolment Information			
 Edit steps ordering 			
 Approval Step 1 Step one: For approval 	Cost/Enrollment Information		
Approval Step 2: No expiration	Coold, the refund amount below as a parameters of th	a full each to be refunded/availted to the leavest upon us	Hedrowial frame a source.
 (voo a step) 	within a certain number of days.	e ion cost to be reiondedictedited to the reamer opon w	unurawai ironn a course
	Number of data before module start date	It of course fee refunded	
	5 or more days	10% refunded	
		To be fording of	Charles and and
	TO OF HORE DAYS	5U% retunded	Delete
	to or more days	50% refunded	Delete
	To or more days	50% refunded	Delete Delete Add >>
	Optional Payment Items	50% retunded	Delete Delete Add >>
	Optional Payment items	5U% retunded	Delete Delete Add >>
	Optional Payment items Specify the refund amount below as a percentage of the within a certain number of days.	50% retunded	Delete Delete Add >>
	Optional Payment Items Specify the refund amount below as a percentage of the within a certain number of days.	50% returned	Delete Delete Add >>
	Optional Payment Rems Specify the refund amount below as a percentage of the within a certain number of days. Number of days before module start date	50% retunded a full cost to be refunded/credited to the learner upon w % of accommodation fee refunded	Delete Delete Arid >>
	Optional Payment Items Specify the refund amount below as a percentage of the within a certain number of days. Number of days before module start date 5 or more days	50% refunded e full cost to be refunded/credited to the learner upon w % of accommodation fee refunded 10% refunded	Delete Delete Add >>

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

E-mail Template Editor	
Templates System Default Approval Expired Notification Cancel Session Notification Copy of-Cancel Session Notification Copy of-Default Enrollment Confirmation Not-Yet-Accessed Reminder System Completion Notification SUBMIT AGREED APPRAISAL SUBMIT PENDING APPRAISAL	NOTE: For security reason, external approval link is not available in CC user. Dear (approver_name), This is a expiration notification of your allowed time period for approval requested by (participant_name) to enroll in (course title). The system will perform the default action set on the policy. If you have any queries, please contact our Learning Systems Administrator ((default_system_approver)). Thank you for your attention.
SUBMIT REVIEW APPRAISAL SUBMIT STARTED APPRAISAL	Parameters Refund Amount (Optional Payment Items)) Append to Message Attachments Select an attachment from the repository. Assign Attachment Assign Attachment

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

Optional Payment Items							
			+ Add Payment Item				
Configured Items	Label Key	Locale Formatted Label					
Credit Card	Credit	Credit					

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

My Accou	unt Details	And the second sec					
Ply Restore	nota [*] Fersicalise) Charge	Tosseers Accounts Sayments Hidsay	_				_
This is a sum	imary of all your course enroimer	Is and associated roals	-	Concession of the	-		The second second
Trans. co	Entry Date Course Title	Description	COMPANY	Loarse cost	Retand	urrency	Entered By
EXPANSION	ton Junizo, zono crime_w_pays	sent online room payment) controlment reactions account costituter. Discourced and	1	20	6	Light Kreden, Founds	Schen
EKPagagooge	509 km 25 2010 online w nast	sent Wood Maday	-	26	in the	Unded Kingdom, Fidanda	System
ExPaddoce	505 Jun 25 2010 online2	Online 2 (Enrollment Feel/Ptan 'Account Customer' Discourted 3%)	1	26	0	United Kinodom, Pounds	System
EKP0000000	006 Jun 25, 2010 online2	Additional Nights	1	00	0	United Kinodom, Founds	Bystem
EKP0000096	507 Jun 25, 2010 online2	Wood Norton	1	25	0	United Kingdom, Pounds	System
EKP0000096	508 Jun 25, 2010 criline2	Withdrawai retund: Full Amount 100 0% of 25	1	0	25	United Kingdom, Founds	System
EKP9000096	509 Jun 25, 2010 online2	Withdrawai rotund: Additional Nights 100 0% of 90.0	1	0	90	United Kingdom, Pounds	System
EKP0000096	510 Jun 25, 2010 online2	Withdrawal reland, Wood Norton 100,0% of 25.0	1	0	26	United Kingdom, Pounds	S/stem
EKP0000096	511 Jun 25, 2010 online_w_pays	rent Withdrawai retund. Full Amount 100 3% of 25	1	0	25	United Kingdom, Founds	System
EKP0000006	12 Jun 25, 2010 online_w_paye	tent Withdrawai refund: Additional Nights 190 0% of 50.0	1	0	50	United Kingdom, Founds	B/stom
EKP0000066	513 Jun 25, 2010 online_w_payt	nent Withdrawal reland. Wood Norton 100.0% of 25.0	1	0	26	United Kingdom, Pounds	System
Bunnaves			Totals	240	240	United Kingdom, Pounds	

Delete a Withdrawal Detail

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

Configurable Additional Enrollment Information

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

Configuration

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

etDim	ensio	ns Talent Suite Mar	nage Center			ADMINISTRATOR System Logo
OVE	RVIEW	LEARNING TALE	NT COMMUNICATE USERS	REPORTS SYSTEM		
Add	litio	nal Enrollment Inform	mation			
Addit	onai E	moliment information that will be	prompted for on enrollment depending on Enr	ultment Policy Settings		
Bu	K Actio	n •				+ Create Fields
•		Field Code	Туре	Name	Locase Formalled Label	
ш.	ò.	Checkbox	Free Text	Checkbox	Checkbox	
0	0	Checkbox2	Checkbox	Checkbox2	Checkbox2	
	0	Date	Date	Date	Date	
13	0	DD	Drop-down	DropdownLabel	DropdownLabel	
	ò	(FT)	Free Text	FreeTextLabel	FreeTextLabel	
0	0	FT2	Free Text			
	ō.	NF	Test Area	New Field	New Field	
	ö	Numeric	Numeric	Numeric	Numeric	

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

- 1. Field Code A unique identifier
- 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)

ñ	NetDimensio	ons Talent Suite	Mana	ige Center	
	OVERVIEW	LEARNING	TALENT	COMMUNICATE	USERS
Add	litional Enrollmen	t Information →			
Ed	lit Addition	al Enrollme	nt Informa	ation For Check	box
Fiel	d Code*				
Ch	eckbox				
Nan	ne 🔞				
Ch	eckbox				
тур	e				
Fre	ee Text 🔹				
Pe	rmissions				
80	Cancel	Delete			

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.

Enrollment Confirmation

For TestEnrollPolicyWithDropdown

ADDITIONAL INFO	RMATION		
DropdownLabel* (Not Assigned)	T		
	_		
Confirm Enrollment	Cancel		

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.

ome Learning Cen	ter Personal Calenda	ar Career Center	Workspace	Connect	Reports	Teach
Records/Tran	script For ADM	INISTRATOF	R System			
TestEnrollPolicy	WithDropdown					
Details						
Last modified by ADM	INISTRATOR System of	n Mar 1, 2016 4:46 A	AM WAT			
Enrollment Date:	Feb 29, 2016 1	0:46 AM WAT				
Start Date:	Not yet started					
End Date:	Mar 1, 2016 4:	46 AM WAT				
Credits:	0.00					
Overall Status:	Withdrawn					
Learning Module Type	e: Online					
Revision Number: There is no attempt re	ecord.	~~~~~~	~~~~~	~~~~~	~~~~	~~~~~
Progress						
Total Training Time:	00	:00:00				
Total # of Online Laur	nches: 0					
Last Attempted Date:	N/	A				
Additional Enrollm	nent Information					
Charged Cost Center						
DropdownLabel	Dro	pdownValue2Label	•			

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.

oerties Columns Grouping	Order Filters Summary		Adv
ave Undo			
t the columns you wish to inc	lude in your report.		
kpand All			
Additional Comments			
User Properties			
Level and the second second	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Organization Attributes	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Module Additional Enrollmen	t Information (Custom Fields)		
Checkbox	Date	FreeTextLabel	Numeric
Checkbox2	E FT2	New Field	
Module Additional Enrollmen	t Information (System Fields)		
Address - City	Branch Phone	Gender	Needs Flight
Address - State	Cell Phone	Is Over 21	Needs Hotel Accommodation
Arrival Date	Charge to Personal Training Budget	Manager E-mail	Preferred Date
Branch Number	Comments	Needs Car	Preferred Location
Program Additional Enrollme	nt Information (Custom Fields)		
Checkbox	Date Date	FreeTextLabel	Numeric
Checkbox2	FT2	New Field	
Program Additional Enrollme	nt Information (System Fields)		
Address - City	Branch Phone	Gender	Needs Flight
Address - State	Cell Phone	Is Over 21	Needs Hotel Accommodation
Arrival Date	Charge to Personal Training Budget	Manager E-mail	Preferred Date
Branch Number	Comments	Needs Car	Preferred Location
Geographic Regions			

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)	 Training History Learning Program Detail
Module Additional Enrollment information (System Fields)	 Training History 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:* ".

Enter a new down list be	message or select text from one	of the predefined messages (the text may be altered for this s	pecific message). Substitution parameters are indic
Language		English	
Predefined N	Message	Default Enrollment Approval Reminder	
Subject		Enrollment Confirmation	
NOTE: For	security reasons, the e	xternal approval link is NOT shown in CC user	e-mails.
Dear (parti	cipant name)		
Door (port	orbeint_namoj.		
This is to a	aufine courses the entire factors	title) If you have any subside planes contact and learning and	terre administrates (Idefault sustans annes ad)
This is to c	contirm your enrollment in (course	_title}. If you have any queries, please contact our learning sys	stems administrator ((derauit_system_approver)).
Thank you	for your attention		
and the second se	for your attention.		
Parameters	Additional Enrollment Informatio	n: Diet Arrangeme Append To Message	
Parameters	Additional Enrollment Informatio	n: Diet Arrangeme Append To Message	
Parameters Attachmer	Additional Enrollment Informatio Additional Charges Additional Enrollment Informatio	n: Diet Arrangeme Append To Message Diet Arrangement	
Parameters Attachmer Select an a	Additional Enrollment Informatio Additional Charges Additional Enrollment Informatio Additional Enrollment Informatio	n: Diet Arrangeme Append To Message Diet Arrangement N: Number of guests	
Parameters Attachmer Select an a Assign attac	Additional Enrollment Informatio Additional Enrollment Informatio Additional Enrollment Informatio Additional Enrollment Informatio Address	m: Diet Arrangeme Append To Message Diet Arrangement m: Number of guests	
Parameters Attachmer Select an a Assign attac	Additional Enrollment Informatio Additional Enrollment Informatio Additional Enrollment Informatio Address Address Address - City	In: Diet Arrangeme Append To Message Diet Arrangement In: Number of guests	
Parameters Attachmer Select an a Assign attac Remove ass	Additional Enrollment Informatio Additional Charges Additional Enrollment Informatio Additional Enrollment Informatio Address Address - City Address - State	m: Diet Arrangeme Append To Message Diet Arrangement Mumber of guests	
Parameters Attachmer Select an a Assign attac Remove ass	Additional Enrollment Informatio Additional Charges Additional Enrollment Informatio Additional Enrollment Informatio Address - City Address - City Address - State Appraisal Right-to-Reply Link	In: Diet Arrangeme Append To Message In: Diet Arrangement In: Number of guests	
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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.

OVERVI	EW	LEARNING	TALENT	COMMUNICATE	USERS	REPORTS	SYSTEM	
Auto-E	inroll C	Console						
Auto-Enr	oll Consol	e Auto-Enro	ll User Listing	Auto-Enroll Log	Targeted Courses	Auto-Enroll	Statistics	
CRI	teria sc	AN INTERVAL						
NOTE check	E: You can	always cause a cific course by s	a specific user setting the auto	to "scan" again by mo -enroll targets again. I	difying their propert 3oth of these action	ies in the user e is reset timestar	ditor. Likewise, yo nps for individual e	u can cause a new scar entities.
Turn	on Online	/Login Auto-En	oll					
Ini	tiate New	Check At Every	Log-In		,	,		
Inte	rval (sec) f	for Processing A	Auto-Enrolls at	Log-In				
30	See	conds						
1	nable onli	ne SubModule I	handling					
OFF	LINE BUI	KAUTO-ENR	DLL					
Normal enrolled If set, it month.	ly, user au l in course is recomm	to-enroll matches (thus, e-mails nended that the	es are only che are sent). This "trickle" option	ecked at log-in. Offline s option is typically DIS be used, as this will p	auto-enroll also en SABLED by default, perform a daily proc	ables users who , as it can have a essing of active	have NOT logged a big impact on the users, with all sca	d in to be scanned and e system. Inned over a period of o
🕑 Turn	on Offline	Bulk Auto-Enro	bll					
All	Active Us	ers Once per D	ay			,		
Save F	Process Re	ecently Updated	Users Now					

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.

NetDimensions Talent Suite Manage Centre							
OVERVIEW LEARNING	TALENT COM	IMUNICATE US	ERS REPORTS SY	STEM			
Auto-Enrol Console		_					
Auto-Enrol Console Auto-Enrol	Learning Id	Enrol Log	vent Started From not specified)	To (not specified)			
User Name	Learning Id	Session Id	Event Time	Search results per page 10 Message			
ADMINISTRATOR System (ndadmir	1)		Feb 6, 2014 4:41 PM CST	Processing user			
ADMINISTRATOR System (ndadmir	1)	G	Feb 6, 2014 4:41 PM CST	Skipped for user. Timestamps indicate no change since last check			
ORG1_135F Org1_135G (org1_135)	_135G (org1_135)		Feb 6, 2014 4:41 PM CST	Processing user			
ORG1_135F Org1_135G (org1_135)	OnIn_CP01	ekp000000001	Feb 6, 2014 4:41 PM CST	No finish date for prior record mismatch			
ORG1_135F Org1_135G (org1_135)) OnInBasic	ekp000000007	Feb 6, 2014 4:41 PM CST	Enrollment Status for the user in the enrollment target: Successful (Enrolment successfully completed.)			
ORG1_156F Org1_156G (org1_156)	j		Feb 6, 2014 4:40 PM CST	Processing user			
ORG1_156F Org1_156G (org1_156)	Onln_CP01	ekp000000001	Feb 6, 2014 4:40 PM CST	Enrollment Status for the user in the enrollment target: Successful (Enrolment successfully completed.)			
ORG1_156F Org1_156G (org1_156)) OnInBasic	ekp000000007	Feb 6, 2014 4:40 PM CST	Enrollment Status for the user in the enrollment target: Successful (Enrolme successfully completed.)			
ORG1_156F Org1_156G (org1_156)	Class01	ekp000000009	Feb 6, 2014 4:40 PM CST	Enrollment Status for the user in the enrollment target: Pending Approval (Enrolment approval required, enrolment was not processed.)			
ORG1_152F Org1_152G (org1_152)			Feb 6, 2014 4:40 PM CST	Processing user			
Showing: 1 - 10 of 32							

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.

		i orro oronali			
System Configuration					
Select a specific configuration category from When you click Save, the current customizat	the drop-down menu below. Subsequion properties file is updated.	ent screens allow you to edit	the properties associated with	i the selected ca	ategor
Select A Category					
Enrolled Learning Modules					
You must save all changes before selection	ng another category.				
Provident Landston Mark Land					
Enrolled Learning Modules				5.5	
Show Revision Information				5.5	
Show Required Information				4.7	
Show Credits Information			4.7		
Show % Complete Information		4.7			
Show Total Training Time Information		6.0			
Personal Calendar Settings	Hide Learning Type(s)	8.1	?		
	Classroom-based	Online	Program		
	Restriction				
	Hide online modules and				
	Show only top level prog				

Save

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

3.Disable the Ignore prerequisites for automatic enrollments property.

