PeopleFluent Learning

Instructor Guide

Release 24.04

Contents

About Instructor Features

Instructor-oriented management of courses, participants, and the knowledge center are available from three Teach page tabs, accessed from the Teach menu.

From the Teach page instructors can manage:

- Active courses

  This tab lists sessions with an Active or Invitation Only status to which the you are assigned as an Instructor.

- Archived courses

  This tab lists the Closed sessions for which you are configured as an instructor. When course sessions are over and their status is updated to Closed, they are moved from the Active Courses tab to the Archive tab.

- Session administration

  This tab lists all the learning modules to which you have read-only or unrestricted access. You can review and enroll participants in sessions from this tab.

You can filter each tab to more easily manage courses and sessions.

To access instructor-oriented features in the Teach page, your system role must have read-only access to the *Instructor* feature in System Roles (Review Features > Review Features).

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About Active Courses

The Active Courses tab lists your course sessions with an Active or Invitation Only event status. You can filter the list or search for courses by title, ID and description. You can also customize the session information shown in the list by selecting which columns to show and hide. Once you have selected the columns you want to show, you can save the selection as a preset.

Course sessions are listed in a table with the following columns by default:

- Module Title (ID)

- Session Title

- Session Status

- Start Date

- End Date

- Seats Registered

- Remaining/Total Seats

For Classroom, Virtual Classroom, and Workshop/Seminar type sessions, you can click the calendar icon in the Module Title (ID) column to see class schedule information.

The Seats Registered column contains an Enrollment Limits indicator. A red icon means the session has reached its maximum enrollment limit. Green means it has not.

Depending on your role access permissions, you can enroll learners in sessions, review participants, and update their attendance records, transcript statuses and grades.

For each session in the Active Courses tab, you can select the following actions from the action menu (subject to your role access permissions):

- Review Participants

- Launch Knowledge Center

- Launch Module Properties

- Launch Session Properties

- Manage Language Bundles

- View Course Details

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About Archived Sessions

This tab lists the inactive sessions for which you are configured as an instructor. When course sessions are over and their status is updated to *Closed*, they are moved from the Active Courses tab to the Archive tab.

For each course in the Archive tab, you can select the following actions from the action menu (subject to your role access permissions):

- Review Participants

- Launch Knowledge Center

- Launch Module Properties

- Launch Session Properties

- Manage Language Bundles

- View Course Details

- Export Pending Requests

- Export Withdrawals

- Export Completions

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About Session Administration

This tab lists all the learning module sessions to which you have read-only or unrestricted access. You can review and enroll participants in sessions from this tab.

For each session in the Session Administration tab, you can select the following actions from the action menu (subject to your role access permissions):

- Review Participants

- Launch Knowledge Center

- Launch Module Properties

- Launch Session Properties

- Manage Language Bundles

- View Course Details

- Upload/Download/Delete Attendance Sheet

- Export Pending Requests

- Export Withdrawals

- Export Completions

- Manage Reference Resources

You can also update the status of one or more sessions in bulk.

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Filter the Session List

You can search for courses by title, ID and description. You can also filter the list by:

- Catalog

- Venue

- Region

- Module language

- Session language

- Start date after

- Start date before

To filter the session list, your system user role must have read-only access to the *Instructor* feature in System Roles (Review Features > Review Features).

To filter the Session list

1. Go to **Home > Teach** and select the Teach page tab you want to filter. The Teach page opens at the selected tab.
2. To search for courses by title, ID or description, enter some or all of the title, ID or description in the Module Title/ID/Description field and press ENTER.
3. To filter the list on one or more criteria, click **Show Advanced Filters**. The filters are shown.
4. Enter or select the required filters and click **Filter**.
5. To display the list with no filtering, click **Reset** and then **Filter**.

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About Active Courses

Customize the Session List Columns

Customize the Session List Columns

You can customize the session information shown in all three tabs in the Teach page by selecting which columns to show and hide in the list. Once you have selected the columns you want to show, you can save the selection as a preset. The selected columns are applied to the Active Courses, Archive, and Session Administration tabs.

To customize the columns in the session list

1. Go to **Home > Teach** and select the Teach page tab you want to customize. The Teach page opens at the selected tab.
2. To use a saved column preset, select it from the Columns drop-down list in the table header. The session list is updated to show the columns selected in the preset.
3. To manually specify the columns to show, click **Customize** in the Columns drop-down list. The Customize Columns dialog opens.
4. To update a saved preset, select it from the Presets drop-down list.
5. To add or remove columns, click the column names in the Invisible Columns box and Visible Columns box respectively.
6. To save the column selection, click **Save As Preset**.
7. To apply the column selection without saving them as a preset, click **Apply**.

To delete a saved preset

1. Select **Manage** from the Columns drop-down list or in the Customize Columns dialog. The Manage Presets dialog opens.
2. Select **Delete** from the action menu of the preset you want to delete. Alternatively, select the check boxes for multiple presets and then select **Delete** from the Bulk Action drop-down list.

Additional Information

About Active Courses

About Archived Sessions

About Session Administration

Manage Reference Resources

You can provide online resources for course participants and instructors. These resources can be:

- A link (URL) to a file maintained outside of the LMS

- A file uploaded to the LMS Repository

- A link to open embedded content from an external site (for example, the embed link from a YouTube video), which opens in a pop-up.

Reference resources can be accessed via the Knowledge Center for the course.

You can upload resources, preview them and remove them from courses (without deleting them from the file repository).

To manage reference resources for a session, your system role must have the *Allow session level reference resource upload from Teach* permission in System Roles (Data Access Control > Role General Permissions).

To manage reference resources

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Filter the sessions list, if required.
3. Select **Manage Reference Resources** from a session's action menu. The Reference Resources page opens.
4. To add a reference resource:
   a. Click **+ Add New Reference**. The Add New Reference dialog opens.
   b. Enter a URL or click the browse button to select a file from the repository.
   c. Enter a description.
   d. Select whether learners and instructors can access the resource from the Knowledge Center.
   e. Select the reference type.
   f. Click **Add**. The resource is added to the page.
5. To preview a resource, click its name or select **Preview** from its action menu.
6. To delete a resource, select **Delete** from its action menu.

Additional Information

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About the Knowledge Center

Upload an Attendance Sheet

If you have printed an attendance sheet and updated it outside of the LMS, you can upload it in any of the Teach page session lists.

If an existing attendance sheet has already been uploaded, you can only download or delete it. To upload an updated attendance sheet, you must delete the existing one first.

To upload an attendance sheet

1. Go to **Home > Teach** and select the Teach page tab for the session you want to upload an attendance sheet for. The Teach page opens at the selected tab.
2. Filter the list of course sessions, if required.
3. Select **Upload Attendance Sheet** from the session's action menu. The Attendance Sheet Uploader dialog opens.
4. Click **Choose a file** to browse for the attendance sheet to upload.
5. Click **Upload**. The attendance sheet is uploaded.

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Mark Attendance for a Scheduled Class

About Reviewing Participants

About Reviewing Participants

You can review a session's participants for sessions to which you have read-only or unrestricted access.

Figure: Review Participants page, filtered on transcript status

In the Review Participants page you can:

- Filter the participants list

- Customize the participants list

- Export the participants list to a CSV file

- Print certificates

- Print an attendance sheet

Depending on organization settings, role access, and permissions, for participants in the list you can:

- Enroll them in a session

- Update the attendance sheet

- Update their review record, for example:

    • Update Credits
    • Change Overall Status (also available as a bulk action)
    • Set a Performance Grade
    • Set a Pre-assessment Score

- •• Set a Post-assessment Score
- •• Set an Assessment Score

- Grant additional attempts

- Update additional enrollment information

- View a Participant's Transcript Details and Exams

- Update their learning status

You can change the status and mark attendance for multiple participants in bulk, via the Bulk Action drop-down list.

To review session participants, select **Review Participants** from a session's action menu in one of the Teach page tabs.

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Customize the Participant List Columns

You can customize the participant information shown in the Review Participants page by selecting which columns to show and hide in the list. Once you have selected the columns you want to show, you can save the selection as a preset.

To customize the columns in the participant list

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Select **Review Participants** from a session's action menu.
3. To use a saved column preset, select it from the Columns drop-down list in the table header. The participant list is updated to show the columns selected in the preset.
4. To manually specify the columns to show, click **Customize** in the Columns drop-down list. The Customize Columns dialog opens.
5. To update a saved preset, select it from the Presets drop-down list.
6. To add or remove columns, click the column names in the Invisible Columns box and Visible Columns box respectively.
7. To save the column selection, click **Save As Preset**.
8. To apply the columns in the Review Participants page without saving them as a preset, click **Apply**.

To delete a saved preset

1. Select **Manage** from the Columns drop-down list or in the Customize Columns dialog. The Manage Presets dialog opens.
2. Select **Delete** from the action menu of the preset you want to delete. Alternatively, select the check boxes for multiple presets and then select **Delete** from the Bulk Action drop-down list.

Additional Information

About Reviewing Participants

Export the Participants List

You can export a filtered or unfiltered participants list from the Review Participants page to a comma-separated values (CSV) file for recording outside of the LMS. The exported CSV file contains all the columns selected for the Review Participants page, which you can customize.

To export the participant list

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Select **Review Participants** from a session's action menu.
3. Customize the participant list, if required.
4. Click **Export to CSV**. The CSV file is downloaded to your browser's configured download folder.

Additional Information

Customize the Participant List Columns

About Reviewing Participants

Enroll Users

You can enroll learners in a course session from the Review Participants page. You cannot enroll learners into archived courses.

To enroll learners, your system role must have unrestricted access to the *Enroll Participant from Teach Review* feature in System Roles (Review Features > Review Features).

To enroll learners in a session

1. Go to **Home > Teach > Session Administration** or **Home > Teach > Active Sessions**. The Teach page opens.
2. Select **Review Participants** from the action menu of the session you want to enroll learners in. The Review Participants page opens.
3. Click **+ Enroll Users**. The Enroll Users dialog opens.
4. Click the **+** icon. The Selector page opens in a new window.
5. Select the learners to enroll in the session and click **OK**. The selected learners are added to the Participant(s) box in the Enroll Users dialog.
6. Select or clear the check boxes for suppressing automatic emails and ignoring schedule conflicts, as required.
7. Enter a cost center name to be charged, if required.
8. Optionally, select the deadline date for completing the session.
9. Optionally, select a start date restriction so that learners cannot launch the course before that date.
10. Optionally, and where applicable, select the language for course delivery, or allow the participant to select the language on launch.
11. Click **Enroll**. The enrollment processing status is shown for each participant.

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Export the Participants List

Update a Participant's Review Record

You can update the information in participants' review records to reflect changes in their enrollment. Before you update a participant's review record, you may need to customize the columns shown in the participant list to show all the information you want to update. For example, to update a participant's overall status, the Overall Status Change column must be included in the participant list. You can also change the overall status and mark attendance for multiple participants, using the Bulk Actions drop-down list.

The type of enrollment information in the participant list is divided into different types:

- General (for example, completion date, overall status, assessment score)

- Additional Enrollment Information, including module attributes (for example, personal details and course requirements)

- User Attributes

- Transcript Attributes

To update a participant's review record

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Select **Review Participants** from a session's action menu.
3. Filter the list of participants, if required.
4. Enter or select the information to update. To change the overall status for multiple participants, select their check boxes and then select **Change Overall Status** from the Bulk Actions drop-down list.
5. Click **Submit**.

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About Marking Attendance

Attendance sheets can be produced for use during the training sessions in a variety of formats. You can download them from the Review Participants page.

If you print them and mark them manually, they can be scanned and uploaded back into the LMS.

If an existing attendance sheet has already been uploaded, you can only download or delete it. To upload an updated attendance sheet, you must delete the existing one first.

You can download, delete and upload attendance sheets via the action menu in the sessions list in the Active Courses or Session Administration tabs.

You can mark attendance for participants in bulk via the Bulk Action menu on the Review Participants page for a particular session. For sessions that involve a number of classes over a period of time, you can mark attendance for each class, with the option to de-select any participants that did not attend.

To mark attendance, go to **Home > Teach > Active Sessions** or **Home > Teach > Session Administration** and click the module title of the class you want to mark attendance for.

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About Reviewing Participants

Mark Attendance for a Scheduled Class

Print an Attendance Sheet

Upload an Attendance Sheet

Mark Attendance for a Scheduled Class

For sessions that involve a number of classes over a period of time, you can mark attendance for some or all participants.

To mark attendance for a scheduled class

1. Go to **Home > Teach > Active Sessions** or **Home > Teach > Session Administration**. The Teach page opens.
2. Filter the list of courses, if required.
3. Click the module title of the session you want to mark attendance for. The Review Participants page opens.
4. At the bottom of the page select the session date of the class you want to mark attendance for and click **Go**. The session's participants are listed.
5. Select the check boxes of the participants you want to mark as attended, or click the link to select the check boxes for all participants in the list.
6. Click **Submit**. The attendance sheet for the class is updated.

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Upload an Attendance Sheet

About Reviewing Participants

Grant Additional Attempts

For courses that use the *Resource* launch interface, the Launch Properties for the course can specify the number of attempts the learner is allowed to launch the course to achieve a passing score and complete the course. You can grant participants additional attempts at any time in the Review Participants page.

You cannot grant additional attempts if:

- The number of course attempts allowed is already set to unlimited in Catalog Editor.

- The transcript Overall Status is Completed, Waiver/Exempt, Passed, Finished Using, Cancelled, or Failed.

- You enter an invalid *Number to be granted* value.

To grant additional attempts

1. Go to **Home > Teach > Active Sessions** or **Home > Teach > Session Administration** and click the module title of course to review its participants. The Review Participants page opens.

2. If the Attempts Taken column is not included in the sessions list, select **Customize** from the Columns drop-down list to add it.

3. Click the Attempts Taken value for the participant. The Grant Additional Attempts dialog opens.

4. Enter the number of attempts to grant the participant (in addition to any they may have remaining).

5. Enter a reason for granting the additional attempts.

6. Click **Submit**. The Attempts taken value is updated with the number of attempts remaining.

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About Reviewing Participants

View a Participant's Transcript Details

You can view a participant's transcript details from the Review Participants page. In the Transcript Details page you can also update some of the same enrollment information you can in the Review Participants page. With the access permissions described below, you can also view a participant's transcript history and review their exams related to the session.

To view a participant's transcript details, your system role must have at least read-only access to the *Detailed Review by Instructor* feature in System Roles (Review Features > Review Features), and *Third-Party Transcript Viewing Permission* configured for the learning module (Catalog Editor > Define Module Security). To update transcript details, your system role must have unrestricted access.

To view a participant's transcript history, your system role must have read-only access to the *Review Transcript History* feature in System Roles (Review Features > Review Submenu Features)

To review a participant's exams, your system role must have read-only or unrestricted reviewer permission for the exam (Exam Editor > Details tab).

To view a participant's transcript details

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Select **Review Participants** from a session's action menu.
3. Filter the list of participants, if required.
4. Click a participant's name. Their transcript details page opens in a new window.
5. Update the enrollment details and attributes, if required.
6. Click an exam name to open the Exam Review page for the exam attempt, if required.
7. Click **Save** to save any changes you made.

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About Reviewing a Participant's Exams

About Reviewing Participants

About Reviewing a Participant's Exams

If you have reviewer permissions configured for an exam, you can review participants' exam attempts. Reviewer permissions are configured per exam. Generated instances of an exam template inherit the template's reviewer permissions.

The exams assigned to a course that the participant has taken are listed in the *Exam Attempts and Results* section of the participant's transcript. Clicking the exam title opens the Exam Review page in a new window. The Exam Review page provides the following summary information:

- Exam properties

- Results broken down by section

- Questions

- Points awarded for each question

From the Exam Review page you can:

- Drill down to an exam summary for the participant

- Change the exam status to *Passed*, *Failed,* or *For Retake*

- View the participant's responses to each question

- Leave a remedial training comment

- Download a printer-friendly PDF of the questions and the participant's responses

- Download a printer-friendly PDF record of the exam pass or failure

If you change the participant's exam status, you must also provide a comment.

To change the exam status of a participant's exam attempt and enter remedial training comments when reviewing learners' transcripts, your system role must have the *Allow Exam Remedial Training Comments* Data Access Role permission.

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About Reviewing Participants

Print Certificates

You can print certificates for participants in the session under review. By default, certificates can be printed for participants with an Overall Status set to Completed status. However, enabling "Allow Print Certificate on or before Session End Date" for the user role will allow this function at any time, regardless of the Overall Status. When you print certificates for multiple users from the Review Participants page, they are saved in a single PDF file, which is saved to your browser's configured download folder.

> ⓘ Your organization may have configured transcript sub-statuses to allow for different types of course completion. For example, the Completed status may have sub-statuses such as *Completed with Merit* or *Completed with Distinction*.

To print certificates for one or more participants

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Select **Review Participants** from a session's action menu.
3. Filter the list of participants, if required.
4. Ensure the participants who have completed the course have an Overall Status set to Completed (or one of its sub-statuses, if applicable).

> ⓘ This step is not necessary if "Allow Print Certificate on or before Session End Date" is enabled for the user role.

5. Click **Print Certificate**. The PDF is saved to your browser's configured downloads folder.

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Update a Participant's Review Record

About Reviewing Participants

Print an Attendance Sheet

When you print attendance sheets from the Review Participants page, they are downloaded to your browser's configured downloads folder. There are several different attendance sheets you can download, which vary in the information they include. All attendance sheets include the course or session details and participants' names.

You can download the following attendance sheets:

- R210 - Attendance Sheet

   This attendance sheet is generated as a PDF file and downloaded.

- R210B - Attendance Sheet

   This attendance sheet includes the total number of participants for the course. It downloads a spreadsheet in XLS format for viewing or editing in Microsoft Excel or other applications that can import XLS files.

- R210C - Attendance Sheet (PDF)

   You can use this option to generate a single attendance sheet for session with no dates, a daily sheet for session with dates spanning the period that are working days, and one sheet for each class schedule if the session has multiple schedules.

- R210D - Standardized Attendance Sheet (PDF)

   This report lists all the participants enrolled in the specified course session(s) in a standardized format. Company logos can be incorporated by replacing the following files in the nd/fresco/images/logos directory: ReportR210DLogoTop.png and ReportR210DLogoBottom.png.

- R210E - Simple Attendance Sheet (PDF)

   This report, a simple form of report R210D, lists all the participants enrolled in the specified course session(s) in a standardized format. It is run as a batch report, which you can download as soon as it has been generated or at any time from **Report Manager > Batch Report**. Company logos can be incorporated by replacing the following files in the nd/fresco/images/logos directory: ReportR210DLogoTop.png and ReportR210DLogoBottom.png

The attendance sheets are also available as Learning reports in the Report Manager.

To print an attendance sheet

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.

2. Select **Review Participants** from a session's action menu.

3. Filter the list of participants, if required.

4. Click **Print Attendance Sheet** and select the attendance sheet you want from the list. The attendance sheet is downloaded to your browser's configured downloads folder.

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Print Certificates

About Reviewing Participants

About the Knowledge Center

Course administrators can enable and configure the Knowledge Center for each course. The Knowledge Center provides learners with information about the courses they are enrolled in, and enables them to communicate and share files with course instructors. Instructors can use the Knowledge Center to access instructor resources, communicate with learners via email and forums, and upload files to share with learners, such as reviewed homework.

Depending on how the Knowledge Center has been configured, instructors can:

- Access reference resources for the course

- Upload and download files in the File Share area

- Access peer comments

- Contact group members

- Contact instructors

- Moderate the forum

To use the Knowledge Center, your system role must have unrestricted access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features).

To open the Knowledge Center, select **Launch Knowledge Center** from a session's action menu in any of the Teach page tabs.

Additional Information

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Share Files

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Contact Group Members

Contact Instructors

About Moderating Forums

Open or Download Reference Resources

Course administrators can provide online resources for course participants and instructors. These resources can be:

- A link (URL) to a file maintained outside of the LMS

- A file uploaded to the LMS Repository

- A link to open embedded content from an external site (for example, the embed link from a YouTube video), which opens in a pop-up

Resources can be made available to:

- Learners and instructors

- Instructors only

To open or download resources, your system role must have at least read-only access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features).

To open or download resources

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Filter the sessions list, if required.
3. Select **Launch Knowledge Center** from a session's action menu. The Knowledge Center opens.
4. Click **Reference Resources**.
5. To open or download a resource, click its filename.

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About the Knowledge Center

Share Files

Learners and instructors can share files in the File Share area of the Knowledge Center. There are three types of file you can upload:

- File Share Area

  This is open to both instructors and learners to share files with the course instructors and enrolled leaners.

- Submitted Homework

  This file share type allows learners to upload files for specific instructors.

- Marked/Reviewed Homework

  Instructors can upload homework files they have reviewed, making them available only to the learners that submitted them.

To share files with learners, your system role must have at least read-only access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features).

> ⓘ The File Share Area must be enabled in both System Configuration and for the learning module (in the Catalog Editor > Module Properties).

To share files with learners

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Filter the sessions list, if required.
3. Select **Launch Knowledge Center** from a session's action menu. The Knowledge Center opens.
4. Click **File Share Area**. Files that have been uploaded, which are available to you, are shown in the three File Share lists.
5. To download a file, click its filename.
6. To upload a file:
   a. Select the file type from the File Type drop-down list.
   b. For marked/reviewed homework, select the participant to share the file with.
   c. Click **Choose a File** and select the file to upload.
   d. Optionally, add a brief description of the file.
   e. Click **Upload**. The file is uploaded to the File Share Area or Marked/Reviewed Homework section.

Additional Information

About the Knowledge Center

Review Peer Comments

For courses that have enabled ratings and peer reviews in their module properties, you can view the ratings and comments left by course participants in the Knowledge Center. You can up-vote or down-vote comments to show whether you thought they were useful or not. Unlike a forum, you cannot directly reply to specific comments, but you can communicate with participants via Contact Group Members to address any issues raised in the Peer Review comments.

To review ratings and peer comments, your system role must have at least read-only access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features).

To review ratings and peer comments

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Filter the sessions list, if required.
3. Select **Launch Knowledge Center** from a session's action menu. The Knowledge Center opens.
4. Click **Peer Comments**. The ratings and comments are listed with the number of people who found each comment useful or not.
5. Click **Yes** or **No** for each comment to up-vote or down-vote the usefulness of the comment.

Additional Information

About the Knowledge Center

Contact Group Members

In the Knowledge Center you can:

- Send an email to all members of the group (that is, all participants for the session)

- Send an email to an individual participant

- View participants' profiles

To contact group members, your system role must have at least read-only access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features).

To contact group members

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Filter the sessions list, if required.
3. Select **Launch Knowledge Center** from a session's action menu. The Knowledge Center opens.
4. Click **Contact Group Members**. The session participants are listed.
5. To send an email to all participants, click **Send Mail to all Members**. An email form opens in the new window.
6. To send an email to an individual, click **Send Mail** under their name. An email form opens in the new window.
7. To view an individual's profile, click **View Profile** under their name. Their profile summary opens in a new window.

Additional Information

About the Knowledge Center

Contact Instructors

In the Contact Instructors area of the Knowledge Center you can:

- Send an email to all instructors assigned to the session

- Send an email to an individual instructor

- View instructors' profiles

To contact instructors, your system role must have at least read-only access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features).

To contact instructors

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Filter the sessions list, if required.
3. Select **Launch Knowledge Center** from a session's action menu. The Knowledge Center opens.
4. Click **Contact Instructors**. The instructors assigned to the session are listed.
5. To send an email to all instructors, click **Send Mail to all Instructors**. An email form opens in the new window.
6. To send an email to an individual instructor, click **Send Mail** under their name. An email form opens in the new window.
7. To view an instructor's profile, click **View Profile** under their name. Their profile summary opens in a new window.

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About the Knowledge Center

About Moderating Forums

Discussion forums provide an online venue for learners and instructors to discuss courses, and to ask and answer questions. For instance, learners can ask questions in a forum related to a particular topic and learn from each other's responses. Instructors can monitor forums as a moderator, intervening if required.

For courses that have forums enabled in their module properties, you can view, create and delete topics in any forums in the category assigned to the course. Depending on your system role access permissions, you may also edit forums, update their access permissions, and delete them.

For more information about creating discussion forums, see the PeopleFluent Learning System Administration Guide.

To access forums from the Knowledge Center, your system role must have at least read-only access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features), and unrestricted access to the Forum feature (Learner-oriented Features > Communicate Features).

To edit, delete and set permissions for forums, your system role must have unrestricted access to the *Discussion Forums* feature in System Roles (Mange Features > Community Manager Features).

To create and delete forums, and delete others' forum topics and replies, you system role must have the *Allow Forum Moderation* permission in System Roles (Data Access Control > Role General Permissions).

You can access course-specific forums from the course's Knowledge Center.

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View and Reply to Forum Topic Posts

You can view forum topics and their posts from the Knowledge Center for courses that have forums enabled in their module properties. You can view and reply to posts and subscribe to forums to receive a daily email with updates, such as new posts.

To access forums from the Knowledge Center, your system role must have at least read-only access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features), and unrestricted access to the Forum feature (Learner-oriented Features > Communicate Features).

To view and reply to forum topic posts

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Filter the sessions list, if required.
3. Select **Launch Knowledge Center** from a session's action menu. The Knowledge Center opens.
4. Click **Forum**. The forum category assigned to the course is listed.
5. Click the forum category title. The forum category opens in a new window and lists the forums assigned to it.
6. Click the name of the forum you want to view. The forum topics are listed in order of recency: topics with the most recently added posts are shown first.
7. Click a topic name to view its post and any replies.
8. To reply to a topic post or one or its replies, click **Reply** under it.

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Create a New Forum Topic

Forum topics are used to discuss a particular issue or subject. Learners can create a new topic to ask a question related to a course, for example. You can create new topics in a forum for courses that have forums enabled in their module properties.

To access forums from the Knowledge Center, your system role must have at least read-only access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features), and unrestricted access to the Forum feature (Learner-oriented Features > Communicate Features).

To create a new forum topic posts

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Filter the sessions list, if required.
3. Select **Launch Knowledge Center** from a session's action menu. The Knowledge Center opens.
4. Click **Forum**. The forum category assigned to the course is listed.
5. Click the forum category title. The forum category opens in a new window and lists the forums assigned to it.
6. Click the name of the forum you want to create a new topic in. The forum topics are listed in order of recency: topics with the most recently added posts are shown first.
7. Click **+ New Topic**. The New Topic dialog opens.
8. Enter the topic title and the message, and then click **Submit**. The topic is added to the top of the topic list in the forum.

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Delete a Forum Topic or Reply

You can delete your own topics and replies, while forum moderators can also delete topics and individual replies posted by others.

To access forums from the Knowledge Center, your system role must have at least read-only access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features), and unrestricted access to the Forum feature (Learner-oriented Features > Communicate Features).

To delete others' forum topics and replies, your system role must have the *Allow Forum Moderation* permission in System Roles (Data Access Control > Role General Permissions).

To delete a forum topic or reply

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.

2. Filter the sessions list, if required.

3. Select **Launch Knowledge Center** from a session's action menu. The Knowledge Center opens.

4. Click **Forum**. The forum category assigned to the course is listed.

5. Click the forum category title. The forum category opens in a new window and lists the forums assigned to it.

6. Click the name of the forum to see its topics. The forum topics are listed in order of recency: topics with the most recently added posts are shown first.

7. To delete a topic and all of its replies, select **Delete** from the topic's action menu. You are asked to confirm the deletion.

8. To delete individual replies in a topic, click the topic name. The original topic post and its replies are shown.

9. Select **Delete** from the action menu of the reply to delete. You are asked to confirm the deletion.

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Edit a Forum from the Knowledge Center

You can edit forums from the Knowledge Center to update its name, description and type. You can update the forum type to one of the following:

- View only

  A unidirectional forum where only the forum moderator can create topics and write posts. Learners can only read them.

- Reply only

  A forum where learners can only reply to a topic but not start a new one. New topics can only be started by the forum moderator.

- Reply and create topic

  A forum where learners can reply to existing topics and start new topics.

To access forums from the Knowledge Center, your system role must have at least read-only access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features), and unrestricted access to the Forum feature (Learner-oriented Features > Communicate Features).

To edit forums, your system role must have the *Allow Forum Moderation* permission in System Roles (Data Access Control > Role General Permissions). You must also have unrestricted access permission for the forum you want to edit.

To edit a forum

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Filter the sessions list, if required.
3. Select **Launch Knowledge Center** from a session's action menu. The Knowledge Center opens.
4. Click **Forum**. The forum category assigned to the course is listed.
5. Click the forum category title. The forum category opens and lists the forums assigned to it.
6. Select **Edit** from a forum's action menu. The Edit Forum dialog opens.
7. Update the name, description and type as required and then click **Save**.

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Update Forum Permissions

You can update forum access permissions to specify which users can view or create posts in them.

To access forums from the Knowledge Center, your system role must have at least read-only access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features), and unrestricted access to the Forum feature (Learner-oriented Features > Communicate Features).

To update forum permissions, your system role must have the *Allow Forum Moderation* permission in System Roles (Data Access Control > Role General Permissions). You must also have unrestricted access permission for the forum you want to update permissions on.

To update a forum's access permissions

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Filter the sessions list, if required.
3. Select **Launch Knowledge Center** from a session's action menu. The Knowledge Center opens.
4. Click **Forum**. The forum category assigned to the course is listed.
5. Click the forum category title. The forum category opens in a new window and lists the forums assigned to it.
6. Select **Permissions** from a forum's action menu. The Permission Selector opens in a new window.
7. Select the users for read-only and unrestricted access as required, and then click **Save**.

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Delete a Forum from the Knowledge Center

As a forum moderator, you can delete forums from the Knowledge Center. When you delete a forum all of its topics and replies are deleted. If you want to preserve the topics and replies in a forum, but do not want other users to see them, you can update its permissions to restrict access.

To access forums from the Knowledge Center, your system role must have at least read-only access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features), and unrestricted access to the Forum feature (Learner-oriented Features > Communicate Features).

To delete forums, your system role must have the *Allow Forum Moderation* permission in System Roles (Data Access Control > Role General Permissions). You must also have unrestricted access permission for the forum you want to delete.

To delete a forum

1. Go to **Home > Teach** and select a Teach page tab. The Teach page opens at the selected tab.
2. Filter the sessions list, if required.
3. Select **Launch Knowledge Center** from a session's action menu. The Knowledge Center opens.
4. Click **Forum**. The forum category assigned to the course is listed.
5. Click the forum category title. The forum category opens in a new window and lists the forums assigned to it.
6. Select **Delete** from a forum's action menu. You are asked to confirm the deletion.

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Permissions

Access to objects in the LMS is controlled by permissions, which you configure in the standard Permission Selector.
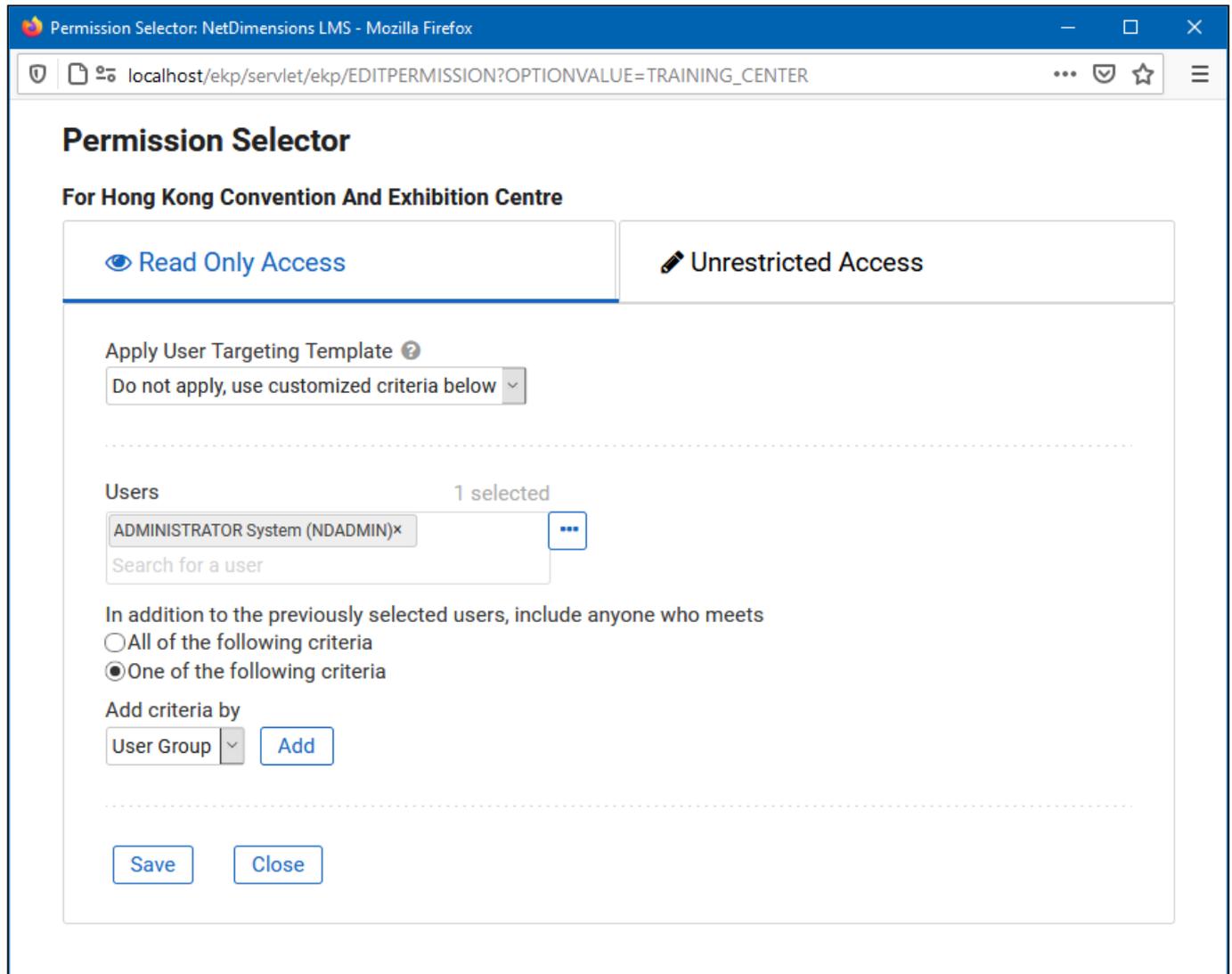

Figure: Permission Selector for Read Only Access to a Training Center

You can provide users with read-only or unrestricted access to many of the objects configured in the LMS, such as course catalogs, individual sessions, training centers and email templates, to name only a few. Read-only access allows user to view the object while unrestricted access allows users to view and modify it.

Selecting Users

There are several ways to select the users you want to configure access for:

- User targeting templates

- Selecting one or more specific users

- Selection criteria based on user group, organization or role

- Selection criteria based on organization attributes (for Auto-enroll and Job Profile Auto-assign permissions only)

User targeting templates are pre-defined selections of users. If you specify a user targeting template, you cannot select individual users or use other selection criteria.

You can combine one or more individually selected users with one or more user groups, organizations and roles.

Because organizations can have a hierarchical structure, you can select organizations to include and those to exclude. This enables you to select a parent organization but exclude one or more of its child organizations.

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Select Users for Permissions

About User Targeting Templates

User Selector

You select users to include in permissions or other user targeting features in the User Selector. To select users, you search for them with the optional search criteria and then select from the results those users you want to include.
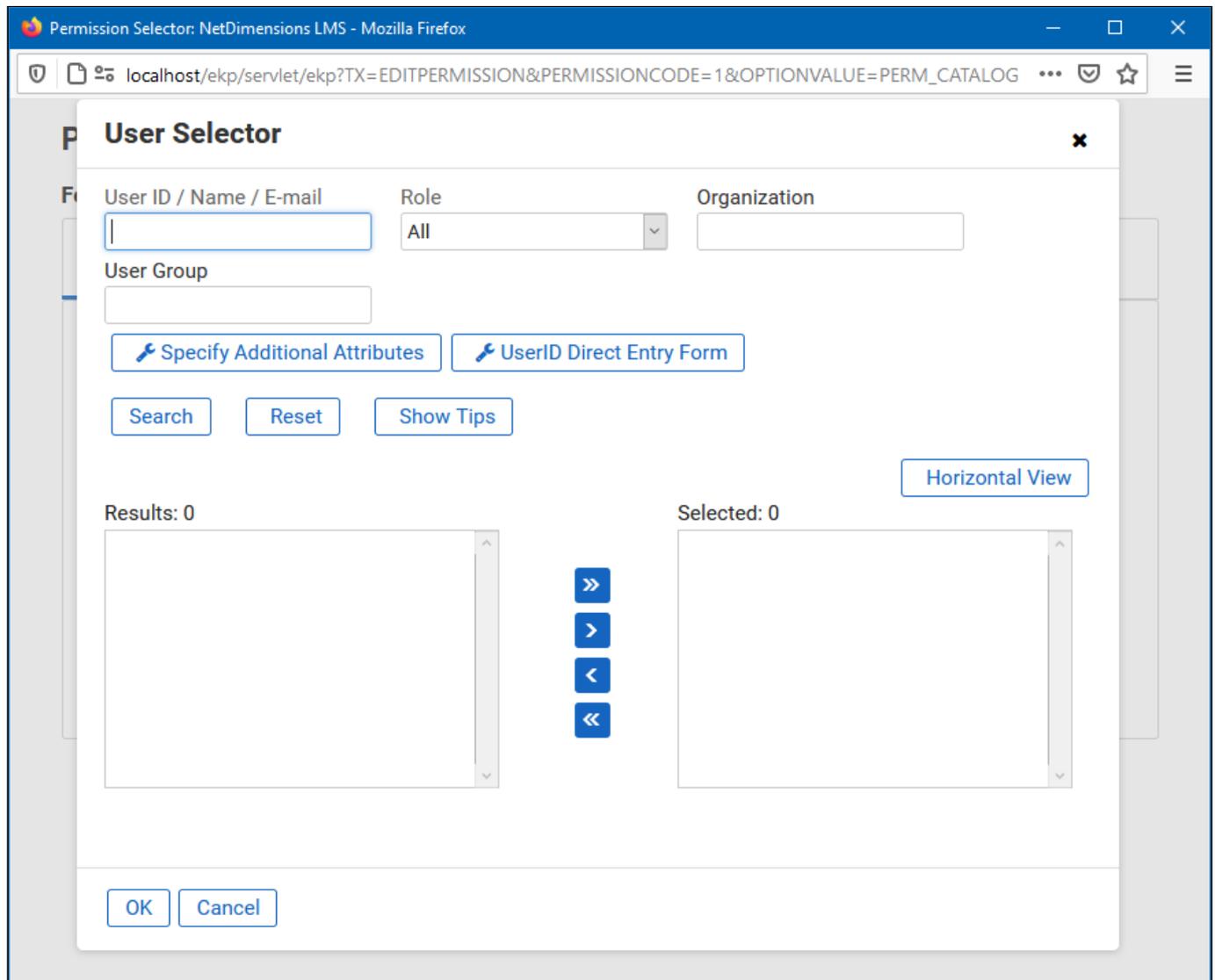

Figure: User Selector Accessed from the Permission Selector

The User Selector is available from various administration pages in the LMS where you can select users to target, including the Permission Selector and User Targeting Template Manager.

To select one or more users to include in the selection

1. Click the browse icon next to the Users field. The User Selector page opens on top of the page you called it from. Any users already selected in the Users field are included in the Selected box in the User Selector.

2. Enter or select criteria to filter the search for users (you can use advanced search syntax in the User ID / Name / E-mail field).

3. Optionally, click **Specify Additional Attributes** to search for users with specific profile criteria, including any User Attribute values. If you specify additional attributes, ensure their criteria do not contradict any in the User ID / Name / E-mail, Role, Organization or User Group fields above.

4. Optionally, click **User ID Direct Entry Form** to enter one or more User IDs, either directly or copied and pasted in from a plain text file or spreadsheet. The User ID Cut and Paste Direct Entry Form page opens in a new window and includes instructions for how to enter a list of User IDs.

5. Click **Search** to list all users meeting your search criteria.

6. To select individual users from the Results box, `Ctrl`+click to select separated individual users or `Shift`+click to select a contiguous block of users and then click the right-facing chevron icon to move them over to the Selected box.

7. To select all of the users in the Results box, just click the right-facing double chevron icon to move them over to the Selected box.

8. Click **OK** to confirm your selection and close the User Selector.

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Permissions

About User Targeting Templates

About User Targeting Templates

User targeting templates enable you to specify the criteria for selecting users and then use the template to select users, such as when setting permissions for viewing courses in the Catalog Browser or search results. When you create a user targeting template your selection criteria are saved in the template so that you don't have to keep specifying the same criteria for different features in the LMS.

Administrators can use user targeting templates to select users in the following user selectors:

- Permission Selector

- Appraisal Target Audience Selector

- Activate a System Language

- Create Token Package

- Terms of Use Manager

To manage user targeting templates, your user role must have unrestricted access to the *User Targeting Template Manager* feature in System Roles (Manage Features > User Manager Features).

To manage user targeting templates, go to **Manage Center > Users > User Targeting Template Manager**.

Set Access Permissions for a Template

When you create a user targeting template only your user account has access to it, and therefore only you can use it to select users. To allow other LMS users to access a template, you must give them read-only permission in the Permission Selector. To allow other LMS users to edit a template, you must give them unrestricted permission.

Editing and Deleting Templates

The Edit and Delete actions are available from the action menu only if you have unrestricted permission for the template.

User Targeting Template Support in Data Loaders

You can specify a user targeting template in the following data loaders:

- Role Access Data Loader

- Question Data Loader

- Equivalency Rule Data Loader

ⓘ   Note that to use a template in a data loader, the person uploading the CSV data file must have at least Read Only permission for the template.

Using a User Targeting Template as a Search Filter

When the *Enable User Targeting Template Search Filter* System Configuration setting is enabled, an advanced search filter is added to some pages (for example, Learning Modules) that enable you to search for all objects of the given type that use a given User Targeting Template for either read or write permissions.

Additional Information

Create a User Targeting Template

User Targeting Templates in Data Loaders

Permissions

Create a User Targeting Template

Administrators can use user targeting templates to select users according to specific criteria for various LMS features that target a defined set of users. To use user targeting templates, your user account's system role must have the required User Targeting Template Manager access control setting.

When selecting users to include in a template, you can combine one or more individually selected users with one or more user groups, organizations and roles.

> ⓘ   Because organizations can have a hierarchical structure, you can select organizations to include and those to exclude. This enables you to select a parent organization but exclude one or more of its child organizations.

To create a user targeting template

1. Go to **Manage Center > Users > User Targeting Template Manager**. The User Targeting Template Manager lists any user targeting templates that you have Read Only or Unrestricted access permission for.

2. Click **+ Create Template**. A new blank user targeting template opens.

3. Enter a unique code and a short, descriptive name for the template.

4. In the User Targeting Template settings box, select the users to include in the targeting template.

5. To select users in the Users box, start typing a user's ID or name and select a user from the auto-complete list, or click the **browse** icon to open the User Selector.

6. To select users from user groups, organizations and roles, select the criteria from the drop-down list and click **Add**. A selection box appears.

7. Click inside the selection box or on its title to select the user groups, roles or organizations to select the users from.

8. Click **Save**. The template is added to the list on the User Targeting Templates page.

9. To configure the access permissions for a template, select **Permissions** from its action menu.

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User Targeting Templates in Data Loaders

When you specify a user targeting template in a data loader, you can choose whether subsequent changes to the user targeting template will be applied to the LMS object that uses it to select users (for example, System Roles). If not, the user targeting template criteria are copied to the LMS object and any subsequent changes to the user targeting template are not applied.

The following table describes the data loader fields you use to specify how the user targeting template will be applied to the LMS object.

Table: User Targeting Template Fields in Data Loaders

Field	Description
Read Permissions Template	Enter the code of the template to use for read permissions.
Write Permissions Template	Enter the code of the template to use for write permissions.
Target Audience Template	Enter the code of the template to use for target audience.
AssignReadTemplate	Enter L to link to the user targeting template as the permission targeting criteria. Subsequent changes to the template will be applied to the targeting criteria.

Enter C to completely copy and replace the permission settings on this object using the current configured settings from the user targeting template. Subsequent changes to the template are not applied to the targeting criteria. |
| AssignWriteTemplate | Enter L to link to the user targeting template as the permission targeting criteria. Subsequent changes to the template will be applied to the targeting criteria.

Enter C to completely copy and replace the permission settings on this object using the current configured settings from the user targeting template. Subsequent changes to the template are not applied to the targeting criteria. |

| AssignTargetAudienceTemplate | Enter L to link to the user targeting template as the target audience criteria. Subsequent changes to the template will be applied to the targeting criteria.

Enter C to completely copy and replace the target audience settings on this object using the current configured settings from the user targeting template. Subsequent changes to the template are not applied to the targeting criteria. |
|---|---|

ⓘ   For the Equivalency Rule Data Loader the Target Audience will be set to specified user targeting template even if the *Apply Target Audience to All Organizations* data loader option has been enabled.

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About User Targeting Templates

Create a User Targeting Template

About Language Bundles

A language bundle is a collection of localizable and translatable fields and language-specific contents in a given language that can be added to an object in the LMS (for example, a course, catalog, or news article). Different LMS objects can have their own set of localizable fields. All localizable objects have a primary language, which is the default language used. You can manage the language bundles for each object independently.

For more information about multi-language support for the LMS, please refer to the *EN600 Multi-language Content Support* Implementation Guide.

Action Menu
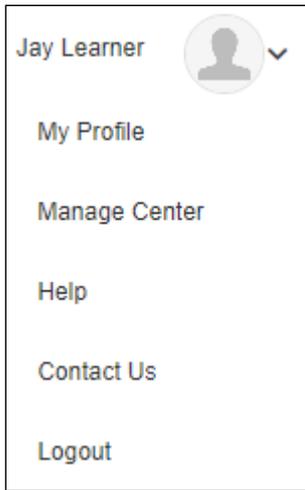
Action Menu Icon
(legacy UI)

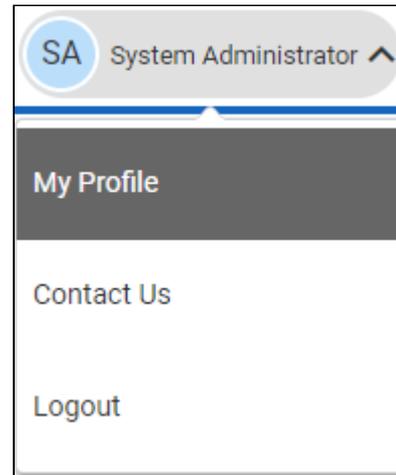Action Menu Icon
(Responsive UI)

The action menu is a drop-down list from which you can select an action (for example, create or delete an object).

The LMS presents many objects in lists, for both learners and administrators, including learning modules, classroom resources, user accounts, and enrollment requests. Each item in the list has an action menu.

Avatar Menu

*Avatar Menu Icon
(legacy UI)*

*Avatar Menu Icon
(Responsive UI)*

Figure: Comparison of Avatar Menus

The Avatar menu is a drop-down list from which users can select an action (for example, log out, access their profile).

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