PeopleFluent Learning

Course and Catalog Administration

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Contents

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Course & Catalog Administration

Course and catalog administration in the PeopleFluent Learning Management System (LMS) involves overseeing and managing the lifecycle of courses and the organization of educational content within the platform. These activities are crucial for ensuring that the learning environment is structured, accessible, and effective for both instructors and learners.

Specifically, course and catalog tasks include:

- Creating and managing learning modules, sessions and programs.
- Creating and managing catalogs to organize the courses.
- Configuring properties, such as vendors, enrollment policies and custom attributes, that can be assigned to courses.
- Configuring class resources, such as calendars, instructors and training facilities, that can be assigned to courses.
- Configuring course payment options.
- Importing course content.
- Managing course participants as a course administrator.

Learning Modules, Sessions and Programs

Learning Modules

Learning modules serve as containers for your organization's courses. Learning modules are characterized by the information set in their properties. Some properties are common across all types of learning modules, while others are unique to specific learning types. For instance, classroom learning types allow configuration of a location or training center, which isn't required for other types like online or virtual.

Learning modules can be created and managed individually from the Learning Modules page or imported in bulk through a data loader.

Create and Manage Learning Modules

Import Courses via the Data Loader

Migrate a Module ID (Learning Object ID)

Learning Module Sessions

Learning module sessions represent individual instances of a learning module, capturing unique session information such as dates, venues, instructors, and participants. Sessions inherit certain properties from the learning module, which can be overridden at the session level. Sessions are also used to assign learning modules to programs.

Create and Manage Learning Module Sessions

Learning Programs

Learning programs group together related learning modules into a learning curriculum. Learning programs are set up similarly to learning modules, the distinction being that they are assigned the **Program** learning type.

Create and Manage Learning Programs

Import Learning Programs via the Data Loader

Create and Manage Learning Modules

Learning modules serve as containers for your organization's courses. Learning modules are characterized by the information set in their properties. Some properties are common across all types of learning modules, while others are unique to specific learning types. For instance, classroom learning types allow configuration of a location or training center, which isn't required for other types like online or virtual.

In this topic, we focus on creating and managing learning modules individually in the Catalog General Settings. For information about bulk importing course data, please see Importing Courses via the Data Loader.

To create and configure learning modules, your user role must have the required access to LMS features associated with course administration.

Create a New Learning Module

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules**.
2. Click +**Create Learning Module**.
3. In the **Learning ID** field, enter a unique ID for the module or click the **Generate unique ID** button to allow the system to generate the ID. **Note**: The format of the system-generated ID is managed by the **Course ID Generaro Format** System Configuration setting.
4. In the **Learning Type** field, select an option from the drop-down list. See Information about Learning Types for details about the available learning types.
5. Click **Create**. The new module opens in the Catalog Editor.

Clone an Existing Learning Module

Some properties of modules or sessions are not cloned. Checklist items and enrollment restriction properties at the module level are not cloned. Similarly, the due date of homework, session attribute values, auto-enroll rules, and auto-enroll equivalency rules at the session level are not cloned.

When you clone a learning module, you can choose to clone all revisions or just the latest revision.

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules**.
2. Locate the learning module you want to clone and open it.
3. Click the clone button at the top-right of the screen.

4. In the **New Learning ID** field, enter a new unique ID for the module or leave it as the default value, which appends _*n* to the original module ID (where *n* increases by one each time the module is cloned).
5. In the **Clone Revisions** field, select the appropriate option to clone all revisions or only the latest revision.
6. Click **Clone**. The new module opens in the Catalog Editor, where you can configure its module and session properties.

Set the Learning Module Properties

Once you have created a learning module, you can configure its properties. Select an option below for details about the property fields in each section.

Learning Module Properties - Catalog Set Up

Learning Module Properties - Access/Enrollment

Learning Module Properties - Knowledge Center Set Up

Learning Module Properties - Launch Setup

Delete or Archive a Learning Module

Existing learning modules can be deleted or archived.

Deleting vs. Archiving a Learning Module

- When you delete a learning module, it's removed from the course catalog and won't appear in search results. Deleted learning modules can't be restored.
- Archiving a module removes it from the catalog but keeps it listed as archived in the learning modules. Archived modules are labeled as virtually archived. You can archive learning modules instantly or set a specific date for automatic archiving by the system. They can be be restored and duplicated to create new learning modules.

Archived and deleted modules remain accessible to participants currently enrolled in them. Deleting or archiving a module does not impact the training records of learners who have completed it.

Delete a Learning Module

This topic explains how to delete learning modules in the Catalog Editor. They can also be deleted using the Course CSV Loader. Please see Import Courses via the Data Loader for additional information.

1. Go to **Manage Center > Learning > Catalog Maintenance > Learning Modules**.

2. Take one of the following actions:

    - To delete one or more learning modules from the list, click the checkbox(es) associated with the appropriate modules. In the **Bulk Action** drop-down field, select **Delete**.

    - Click a Module Title to open the module and use the **Delete** button to delete it.

3. Confirm the delete action when prompted.

Archive a Learning Module

To archive a module, you user role must have unrestricted access to the *Catalog Manager* and *Catalog Editor - Module Management* features in System Roles (Manage Features > Catalog Manager Features).

1. Go to **Manage Center > Learning > Catalog Maintenance > Learning Modules**.
2. Locate the appropriate learning module and click the Module Title. The module opens in the Catalog Editor.
3. Click **Virtual Archive** in the Module Properties tab. The Virtual Archive page opens.

    - To archive the module with immediate effect, select the **Archive** check box and click the **Save** icon.

    - To archive the module on a specific date, select a date in the **Auto-Archive Date** calendar picker and then click the **Save** icon.

4. Click **Save**.

To reinstate an archived learning module, return to the **Virtual Archive** screen and clear the **Archive** check box.

Learning Module Properties - Catalog Set Up

Module properties for catalog setup categorize the course in the catalog, with many of the properties appearing in the Course Details page and Knowledge Center. Required properties differ based on learning type, with only relevant properties available for configuration in a learning module.

Define Module Properties

Applicable Learning Types: *All Learning Types*

The Define Module Properties page is where you configure the primary properties for the learning module.

To configure module properties for catalog setup

1. When you open a learning module, it opens with the **Define Module Properties** page active.
2. Configure the properties as required. The page sections are described below. For detailed information about each of the configuration fields on this page, please see Module Properties Field Reference.
    - **Learning Module Details** - The information in this section is used to classify the course entry within the catalog.
    - **Catalog Configuration** - In this section, you can assign modules to one or more catalogs.
    - Who should take this? - In this section, you can specify the target audience for the module.
    - Collaboration Tools - In this section, you can select and configure the collaboration tools that are available to learners for the course.
    - Optional Module Attribute(s) - If any optional module attributes are configured, they can be assigned in this section.
3. Click **Save**.

Manage Cost Information

Applicable Learning Types: *Audiocassette, CD ROM, Classroom, Coaching, Exam, Just-in-Time Learning, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Special Interest Group, Virtual Classroom, Virtual Classroom (Archive) Workshop/Seminar*

Course costs can be charged in a specific currency or to organization token accounts.

To assist in budgeting and planning tasks, PeopleFluent recommends assigning a cost to the course, regardless of whether participants incur charges. In such instances, you would opt for "Charged per Registration" under the Charge Procedure property and input the cost for each participant attending the course.

To configure cost information

1. Click **Enter cost information**.
2. Enter the cost information properties. For additional details about the cost fields, please see Cost Information Field Reference.
3. Click **Save**.

Manage Objectives

Applicable Learning Types: *Audiocassette, CD ROM, Classroom, Coaching, Exam, Just-in-Time Learning, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Special Interest Group, Virtual Classroom, Virtual Classroom (Archive) Workshop/Seminar*

You can include a list of course objectives with the learning module. Objectives are displayed as a bulleted list on the Course Details screen.

In addition to plain text, you can include HTML tags to format the text. For example:

- Enclose text in `<strong> </strong>` tags to make it **bold**.
- Enclose text in `<em> </em>` tags to make it *italic*.
- Split a single objective bullet point into two or more lines by including the `<br>` tag to end a line of text.
- Enclose text in `<span style="`*`style definition`*`"> </span>` to use CSS to style text in an objective. For example, to highlight the word *management* with a yellow background, you would enter the objective as: `Train the <span style="background:yellow;">management</span> in the use of...`

To create objectives for a learning module:

1. Click **Enter objectives**. The Objectives page opens.
2. Enter the objectives in the provided fields. Initially, you can enter up to 9 objectives. If you want to add more, click the **More Objectives** link at the bottom of the list.
3. Clive **Save**.

Enter References

Applicable Learning Types: *Audiocassette, Book, CD ROM, Classroom, Coaching, Exam, External Course, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Special Interest Group, Task, Virtual Classroom, Virtual Classroom (Archive) Workshop/ Seminar*

The LMS allows you to provide online resources for both course participants and instructors. These resources may include URLs linking to files outside the LMS, files uploaded to the LMS Repository, or links to embedded content from external sites, such as YouTube, which open in pop-ups. Users can access these resources from the Course Details page, the Knowledge Center, and via Resource search.

To add a reference resource to a learning module

1. Click **Enter references**. The **Reference Resources** page opens.
2. Click **Add New Reference**. The Add New Reference modal pop-up opens.
    - To include a file from the Repository, click the Browse icon to open the Repository Manager, where you can select the file.
    - To include a file or embedded content from outside of the LMS, enter the URL.
3. Click the checkbox for **Learner**, **Instructor** or both to determine who can view the resource.
4. Select the Reference Type.
5. Select the check box if you want to include a link to the resource in the catalog, which allows people to download it without having to enroll in the course first.
6. Click **Add** to create the reference to the resource in the LMS.
7. Click **Save**.

Preview

Applicable Learning Types: *Audiocassette, Classroom, Coaching, Exam, External Course, Just-in-Time Learning, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Special Interest Group, Task, Video, Virtual Classroom, Workshop/Seminar*

As you create and configure a learning module and module sessions, you can preview the how the information will appear on the Course Details screen. Simply click on the Preview page to do so.

View Usage Statistics

Applicable Learning Types: *Audiocassette, Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Special Interest Group, Virtual Classroom, Workshop/Seminar*

Access enrollment, withdrawal, completion, and knowledge center usage statistics for the learning program/module via the View Usage Statistics page. These statistics are updated daily, excluding current day activity. Utilize the date fields to filter statistics based on your preferred time frame.

Indicated Interest List

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Special Interest Group, Virtual Classroom, Workshop/Seminar*

The Indicated Interest List displays learners who have expressed interest in enrolling in the course on the Course Details page. Within this list, you can enroll users in the course, send them emails, and remove them from the Indicated Interest list as needed.

To perform an action from the Indicated Interest List:

1. Click Indicated Interest List.
2. Select the checkbox(es) for one or more of the users in the list.
3. In the **Bulk Action** drop-down field, select the appropriate action.
4. Configure the action as appropriate. If you choose to enroll the selected users, you will select a session and then enroll them as a group in that session on the **Group Enrollment** page. When learners are successfully enrolled, the are automatically removed from the Indicated Interest List.

Associated Programs

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Special Interest Group, Task, Virtual Classroom, Workshop/Seminar*

If the learning module is linked with one or more learning programs, you can view these programs on the Associated Programs page. Here, you have various options for managing the learning module-program association.

1. Click **Associated Programs**.
2. Associated programs display in a list. Click Program Title (ID) to open the learning program. Click Session Title (ID) to open the learning program session.

3. To perform a bulk action on one or more of the associated programs, click the appropriate checkbox and select an option from the Bulk Action menu. Options include:

    - **Session Enrollment Update** - If there are changes in a program session's structure, updating enrollments may be required. The Session Enrollment Update reruns enrollment processing, allowing you to update enrollments for current participants, re-enroll those who completed the session, and notify affected learners via email.
    - **Update Deadlines of Users** - This option lets you set a new deadline for participants already enrolled in a linked program. To stay On Target in their program progress, participants must meet module deadlines as outlined on the Learning Program Session Module Assignment page. Deadlines are set upon enrollment, so adjusting them in session properties applies only to learners who enroll after the change.
    - **Set Deadline** - This option allows you to set a deadline for participants already enrolled in an associated program.
    - **Edit Associations** - This option enables you to adjust the weighting, order, and credits of one or more modules for the associated program session. Additionally, you can specify if they are required and initiate an enrollment update.
    - **Remove Associations** - When you remove an association with a single associated program, you can run an enrollment update.

Revisions and Launch Preview

Applicable Learning Types: *Coaching, Exam, Online, On-the-Job Training, Self-Training (Paper), Self-Training (Video), Special Interest Group, Task*

To import a course revision in the Catalog Editor

1. Click **Revisions and Launch Preview** in the Module Properties tab. The Revisions and Launch Preview page lists the revisions for the module.
2. Select the type of import from the +Import New Revision drop-down list. Each type of import requires different parameters.
3. In the Confirm New Module Revision page select who to make the new revision available to. The default options for new module revisions are to make it available to learners who have not yet been enrolled and to learners who have been enrolled but have not yet started it.
4. Click **Publish**. A message is displayed confirming the course revision has been created.
5. To Preview the new course revision, click **Preview**.

Virtual Archive

Applicable Learning Types: *Audiocassette, Book, CD ROM, Classroom, Exam, External Course, Just-in-Time Learning, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Special Interest Group, Task, Video, Workshop/Seminar*

Please see Configure and Manage Learning Modules for additional information about archived learning modules.

eSignatures

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Special Interest Group, Task, Virtual Classroom, Workshop/Seminar*

You have the option to require eSignatures for different actions and activities associated with the learning module. You can inherit the organization-level settings for each eSignature option or individually enable/disable them at the module level.

1. Click **eSignatures**.
2. On the eSignatures screen, click the **Require eSignatures** checkbox.
3. By default, all of the eSignature options are configured to inherit the organization-level settings. You can change the setting for a specific eSignature option by making a selection from the associated drop-down field. **Note**: Mouse over the help icon to get information and special notes about each of the eSignature options.
4. Click **Save**.

Checklist

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Special Interest Group, Task, Virtual Classroom, Workshop/Seminar*

Checklists can be generated for learning modules to monitor preparatory tasks like arranging venue bookings for classroom training, and securing plane tickets and accommodations for participants. These checklists can be created either by adding checklist items directly within the learning module or by utilizing pre-configured templates.

> For information about creating and managing Checklist Templates, please see Create a Checklist Template.

To manage the learning module checklist:

1. Click **Checklist**. **Note**: If there are previously created checklist items that are incomplete, they are displayed by default. You can update which items are displayed by making a selection from the **Item Status** field.

2. Use one of the following methods to configure the learning module's checklist.

    - **Create Checklist Items Directly on the Screen**

        a. Click **+ Create Checklist Item** and select **Create New Item**.
        b. Enter a descriptive name for the item.
        c. Click the Mark as Important checkbox to emphasize the importance of the item.
        d. By default, the creator of the checklist item will be listed as the owner. Use the Browse button to select a different user. Click the **X** to remove a user from the **Owner** field.
        e. To set a deadline for a module checklist item to be completed, select a date from the **Deadline** date picker field.
        f. To send a reminder email to the item owner a specified number of days before the deadline, select the **Send reminder** check box.
        g. Click OK.
        h. Repeat these steps for each checklist item. To delete an item, click on the Action Menu icon and select **Delete**.
        i. Click **Save**.

    - **Generate a Checklist from a Template**

        a. Click **+ Create Checklist Item** and select **Generate from Template**.
        b. Select a template from the options in the drop-down field.
        c. Click **OK**. Items from the template are added to the checklist. The items can be edited by clicking on the item's Action Menu icon and selection **Edit**. To delete an item, click on the Action Menu icon and select **Delete**.
        d. Click **Save**.

Marking Checklist Items Complete

To manually mark a checklist item as complete, click on the Action Menu icon and choose the "Mark as Completed" option.

Recommended Class Resources

Applicable Learning Types: *Classroom, Workshop/Seminar*

You can recommend resources needed for a classroom-based or workshop/seminar learning modules. For example, a classroom-based course might require a projector or flip chart. Recommended class resources will be automatically loaded when new classes are added to the class schedule for a session of the course.

Class resources are created using the Class Resource Manager and are then selectable in learning module set up. This topic focuses on assigning resources to the learning module. For information about creating class resources, please see Class Resources.

To add a recommended class resource

1. Click **Recommended Class Resources**.
2. To add one or more resources, click **+ Add Resource**.
3. Search for resources using multiple criteria, including class resource attributes. A list of matching resources displays in the field on the left.

> For information about managing the available class resources, please see Create and Manage Class Resources

4. To select one or more resources from the search results, select them and then click the right arrow to move them to the field on the right.
5. When you have selected the class resources, click **OK**.
6. Click Save.

Learning Module Properties - Knowledge Center Set Up

The Knowledge Center offers learners information about their enrolled courses and provides access to various LMS features like course launch, withdrawal, reference materials, forums, course notepad, file sharing, and instructor communication. Instructors can utilize it for accessing resources, communicating via email and forums, and sharing reviewed homework files with learners. Knowledge Center settings are initially set universally in System Configuration. Course administrators can further customize Knowledge Center settings for individual modules in the Catalog Editor, overriding System Configuration settings.

To configure the Knowledge Center

1. Click **Setup Options**.
2. The Knowledge Center may or may not be enabled by default for learning modules in the System Configuration settings. If it is not enabled, you can check the box to enable the it for the learning module.
3. Select one of the options to specify whether an image is shown in the Knowledge Center. To use an image different from the catalog image, select **Define an image** and click the Browse icon to select an image from the Repository Manager.
4. Select the check boxes to change the default settings to specify which features are shown in the Knowledge Center. For additional information about each of the options, please see Knowledge Center Settings.
5. Click the **Save** icon.

Learning Module Properties - Access/Enrollment

Define Module Security

Applicable Learning Types: *Audiocassette, Book, CD ROM, Classroom, Coaching, Exam, External Certification, External Course, Just-in-Time Learning, Online, On-the-Job Training, Program, Self-Training (Paper), Self Training (Video), Special Interest Group, Task, Video, Virtual Classroom, Virtual Classroom (Archived), Workshop/Seminar*

You can set access permissions for learning modules, specifying who can view (Read-Only Access) and who can edit (Unrestricted Access). Typically, instructors and learners have read-only access. Instructors need this to administer their sessions. If granted in Module Properties, they'll have this access for all sessions; otherwise, it must be granted for each session. Learners require read-only access to enroll in a module.

To configure the permissions for a learning module

1. Click **Define Module Security** in the Module Properties tab.
2. Click **Permissions**.
3. On the **Read Only Access** tab, locate and select the read only users (learners and instructors).
4. On the **Unrestricted Access** tab, locate and select users who will have access to edit the module.
5. Click Save.

Assign Prerequisites

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Special Interest Group, Task, Virtual Classroom, Virtual Classroom (Archived), Workshop/Seminar*

Setting prerequisites for learning modules ensures participants are adequately prepared for a course. You can designate both primary and secondary prerequisite courses, specifying how to check if they're met. Additionally, you can choose to require at least one prerequisite or that all prerequisites are met.

To assign prerequisites to a module

1. Click **Assign Prerequisites**.
2. Click the **Assign prerequisites** link. The **Currently Required Module(s)** page opens in a new window.
3. Enter a search term to search for the prerequisite module or select a catalog and learning type to help refine the search results.
4. Click **Filter**. The learning modules matching your search criteria are listed in the **Available Choices** box.

5. Select one or more modules in the list and click the down-facing chevron to add them to the **Selections** box.
6. Repeat steps 4 to 6 to search for other learning modules, if required. To remove a module, select it in the Selections box and click the up-facing chevron.
7. Click **OK** to return to the Assign Prerequisites page.
8. Select the prerequisite check type from the drop-down list. It will be applied to all of modules in the Currently Required Module(s) list.
9. If you assigned more than one prerequisite learning module, select from the Prerequisite Business Logic drop-down list whether the check type condition must be met by all prerequisites (**Use AND logic**) or just one (**Use OR logic**).
10. Click **Save**.
11. To assign a secondary set of prerequisites repeat steps 2 to 10 above.

Assign Related Courses

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self Training (Video), Special Interest Group, Task, Virtual Classroom, Virtual Classroom (Archived), Workshop/Seminar*

Related courses can be suggested to learners to enhance their learning experience alongside a module. These courses are displayed in the Course Details page. Clicking on a related course's name directs users to its own Course Details page, where they can enroll or request enrollment. Unlike prerequisites, recommended courses are optional.

To assign a relate course to a learning module

1. Click **Assign Recommended Course(s)**.
2. Click the **Assign Recommended Course(s)** link.
3. Locate the appropriate courses using the search.
4. To add one or more courses to the list of recommended courses, select each course in the Available Choices box and click the single chevron to move them to the Selections box.
5. Repeat steps 4 to 5 to find other courses as required.
6. Click **OK**.
7. To remove courses from the Currently Added Modules box, select them and click the **Remove Recommended Course(s)** link.
8. Click **Save**.

Assign Supervisor Assessment

Applicable Learning Types: *On-the-Job Training*

Course administrators can assign one or more supervisors and a supervisor assessment exam type for On-the-Job (OTJ) learning types. In such instances, the supervisor must complete the associated supervisor assessment exam for the participant to finish the course. Configured in the learning module, this means that all participants in the course must undergo assessment as defined in the module.

> ⓘ You also have the ability to configure supervisor assessment in Group Enroll in Session Properties. Please see for Learning Module Session Properties for additional information.

To assign a supervisor assessment to an OTJ learning module

1. Click **Assign Supervisor Assessment**.
2. Click the Browse icon in the **Supervisor Assessment** field.
3. Available supervisor assessments display in the **Available Choices** box.
4. Filter the list if necessary.
5. Select the appropriate assessment and click the down arrow to move them to the **Selections** box.
6. Click **OK**.
7. Select who can carry out the assessment. The learner's direct appraiser is selected by default. You can also select the user's direct supervisor (as configured in the user profile).
8. Select one or more check boxes to specify who can carry out the supervisor assessment. Options include the learner's direct appraiser, direct supervisor (as configured in the user's profile) or you can assign one or more specific LMS users to perform the assessment. To do this, click the Select link and select the user.
9. Optionally, select the supervisor assessment delivery language from the drop-down list.
10. Click **Save**.

Assign Exam/Certification/Evaluation

Applicable Learning Types: *Classroom, Coaching, Exam, Online, Program, Self-Training (Paper), Self Training (Video), Special Interest Group, Task, Virtual Classroom, Virtual Classroom (Archived), Workshop/Seminar*

Learning modules can be assigned a certification, an evaluation and one or more exams.

To assign exams, certifications and evaluations to a learning module:

1. Click **Assign exam/certification/evaluation**.
2. Configure the options as described below:

    - **Exams** - Learning modules can have multiple exams, each with configurable rules—like mandatory or optional status—and options for automatic module completion upon passing all exams. Additionally, you can select the exam language if available in multiple languages. Exams can be accessed by participants from both the Learning Center and the Knowledge Center Course Details.

a. To assign one or more exams, click the **+** icon. A selector page opens in which you can search for and select exams.
b. If you want to make it mandatory to pass **all** of the selected exams in order for the participant to complete the module, select the **Mandatory** check box.
c. Select whether passing the exams automatically completes the module for the participant.
d. For exams available in more than one language, select from the Delivery Language drop-down list how the delivery language is determined.

- **Certification** - You have the option to select a certification to link with the learning module. Certificates are usually granted upon course completion or, if applicable, upon passing an associated certification exam.

a. Click the Browse icon in the Certification field. A selector page opens in which you can search for and select a certification.
b. To remove the certification, click the **delete** icon. The certification name is removed from the Certification field.

- **Evaluation** - Evaluations, a type of exam, can be selected and linked with the learning module. You can designate whether participants must complete them.

a. Click the Browse icon in the Evaluation field. A selector page opens in which you can search for and select an evaluation.
b. To remove the evaluation, click the **delete** icon. The evaluation name is removed from the Evaluation field.

Define Enrollment Policy

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self Training (Video), Special Interest Group, Task, Virtual Classroom, Virtual Classroom (Archived), Workshop/Seminar*

Enrollment Security controls user enrollment permissions, while Enrollment Policy dictates the enrollment processing flow. These settings are managed on the Define Enrollment Policy page of the learning module. Additionally, you can configure whether users can re-open a module after completing it.

> For detailed information about the properties in each section, see Learning Module Enrollment Policy Properties.

To define an enrollment policy for a learning module

1. Click **Define Enrollment Policy**.
2. In the **Enrollment Security** section, configure access to the course and other actions participants can take relating to enrollment. Select any organization or user constraints as required.
3. In the **Enrollment Policy** section, you can configure which enrollment policy to assign to the learning module.

    - The Default Policy is automatically assigned to new courses. It enables self-enrollment without approval, allowing learners to enroll instantly. To select a different policy, click the Browse icon to open the Enrollment Policy Editor. Note: Approval-based organization-level enrollment policies don't override the Default Policy if it's assigned to a learning module.
    - To assign a distinct enrollment policy for a particular organization's members, choose the Organization Group option. Select the organization by clicking the Browse icon in the Organization field, and choose the policy by clicking the Browse icon in the Policy Name field. Click the Add organization button to configure additional organizations. To prioritize the organization-level policy over the course policy, check the **Allow a configured organization enrollment policy to take precedence over this course policy** checkbox.

> For information about managing the available enrollment policies, please see Create and Manage Enrollment Policies.

- To assign a distinct enrollment policy for a specific organization's members, select the Organization Group option. Then, choose the organization and policy by clicking the Browse icon in the respective fields. You can establish additional organization/ policy associations by clicking the Add organization policy button. Check the box "Allow a configured organization enrollment policy to take precedence over this course policy" to prioritize the organization-level policy over the course policy.
- To choose an alternate enrollment policy for a user group, choose the User option. Then, select the user group and policy by clicking the Browse icon in the respective fields. Additional user group/policy associations can be created by clicking the Add organization policy button.

- Click the checkbox to apply the Enrollment Policy when learners choose an active session or are moved from a "Prompt User to Select Session" session.

4. In the "Allow reopen" section, mark the checkbox to permit learners to revisit and download resources from the course after completion. Note: Learners reopening a module do not earn extra credit for completing the course again.
5. Click **Save**.

Enrollment Restriction

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self Training (Video), Special Interest Group, Task, Virtual Classroom, Virtual Classroom (Archived), Workshop/Seminar*

Enrollment restrictions enable you to restrict course enrollments within a set date range based on organization and/or job profile. Multiple rules can be configured targeting specific organizations and job profiles, allowing varying enrollment limits per organization.

If enrollment is requested outside the configured date range for the module, the restriction is not enforced.

For learning modules with one or more sessions, enrollment restrictions defined at the module level are applied to its sessions by default. For each session, you can choose to have no restrictions, keep the module level restrictions, or define different restrictions. For additional information about configuring sessions, please see Create and Manage Learning Module Sessions.

To configure an enrollment restriction for a learning module

1. Click **Enrollment Restriction**.
2. When you created to module, the **Restriction Process** field was set to Unrestricted by default. Select **Use Module Restriction** from the **Restriction Process** drop-down list.
3. To set the date range, click the calendar icon in the **Start Date** field to select the start date then click the calendar icon in the **End Date** field to select the end date.
4. In the Rule(s) section, select the organizations affected by the enrollment restriction. At least one organization must be chosen. Click "Select Organization(s)" to open the Organization Selection page in a new window. Select the relevant organizations and click "OK" to add them to the list. To remove an organization, simply deselect it from the list.
5. In the **Limit per Organization(s)** field enter the number of enrollments allowed for the selected organizations.
6. To select the job profiles to which the restriction will apply, click **Select Job Profile(s)** field label and select one or more job profiles in the Selector page.

7. Click the **Save** icon.

Email Preferences Setup

Applicable Learning Types: *Classroom, Virtual Classroom, Workshop/Seminar*

Emails can be triggered when certain events related to classroom or virtual classroom courses occur, and sent to various LMS users like participants, instructors, and managers. System Default email templates are available to specify content, recipients, and frequency. Additionally, custom email templates can be selected and configured at the module level.

> Email preferences set at the module level are automatically applied to its sessions by default. These preferences can be modified within each session, with session-level configurations taking precedence over module-level settings. If no preferences are configured for a session, the module's settings are utilized.

To configure the email preferences for each course-related event for a learning module

1. Click **Email Preferences Setup**.
2. Configure the event emails as necessary. For additional information about each of the events and their configuration options, please see Email Preferences.
   - To select or edit the email template click the Browse button. Locate and open the appropriate template. Review the template and make any updates that will apply to the module only. Alternatively, you can create a new email template.
   - Enter or select any additional configuration options available for each event email.
3. Click the Browse icon for each event to which you would like to assign a custom template. The Email Template Editor opens in a new window.

Learning Module Properties - Launch Setup

Launch properties determine the launch method and tracking of online course delivery. Various properties correspond to each launch interface type, enabling entry of required and optional properties upon selection of a launch interface.

Define Launch Properties

Applicable Learning Types: *Classroom, Coaching, Exam, External Certification, Just-in-Time Learning, Online, On-the-Job Training, Self-Training (Paper), Self-Training (Video), Special Interest Group, Task, Virtual Classroom, Virtual Classroom (Archived), Workshop/Seminar*

To define launch properties, your user role must have unrestricted access to the Catalog Manager and Catalog Editor—Module Management features in System Roles (Manage Features > Catalog Manager features).

To define the launch properties

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules**.
2. Locate the appropriate learning module and open it.
3. Click **Define Launch Properties** in the Module Properties tab.
4. Select the appropriate launch interface from the drop-down list. For additional information about the available launch interface properties, please see Launch Interface Properties.
5. Optionally, enter the height and width of the course launch window. If you leave them blank, the default settings defined in System Configuration are used.
6. Enter the launch settings for the selected launch interface.
7. Select the IE compatibility mode from the drop-down list.
8. Click Save.

Create and Manage Learning Module Sessions

Learning Module Sessions represent individual instances of a learning module, capturing unique session information such as **dates, venues, instructors, and participants. Sessions inherit certain properties from the learning module, which can be overridden at the session level.** Sessions are also used to assign learning modules to programs.

For learning types requiring enrollment processing, at least one session must be defined, excluding Just-in-Time modules. An active session is automatically generated upon learning module creation, except for classroom-based modules and programs. Multiple sessions can be scheduled simultaneously, provided there are no resource conflicts.

Sessions inherit properties from the learning module, allowing reuse without reconfiguration. Overriding inherited values is possible at the session level. Session-level configurations take precedence.

In this topic, we focus on creating learning module sessions individually from the Learning Modules screen. For information about bulk importing course data, please see Import Courses via the Data Loader.

To create and configure learning module sessions, your user role must have the required access to LMS features associated with course administration.

Create a New Learning Module Session

To create a session:

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules**.
2. Locate the appropriate learning module and click the Module Title.
3. Click **Session Properties**.
4. Click the **Add Session icon** in the Session Properties tab. The Edit Session Properties page opens for the new session with the Session Code is pre-populated.
5. Click **Save**.

Clone an Existing Learning Module Session

You can clone a session once or multiple times to schedule regular recurrences. The LMS automatically generates and sets dates for sessions to repeat daily, weekly, or monthly. This feature is handy for modules such as new starter induction courses that are held monthly. For recurring sessions, you can set the session status and adjust enrollment windows, homework, and completion deadlines automatically. For instance, for monthly recurring sessions, these dates can advance by one month with each recurrence to align with each session.

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules**.
2. Locate the appropriate learning module and click the Module Title.

3. Click **Session Properties**.
4. Select the appropriate session and click **Go** to open it.
5. Click **Clone** in the Session Properties tab. The Clone Session page opens in the Catalog Editor.
6. Select the Session Status for the cloned session or repeated sessions.

> If you do not want cloned sessions to appear in the Course Calendar or Course Details immediately, select the *Pending* Session Status.

6. To create regularly repeating sessions, click the **Repeat** check box and select the recurrence frequency from the drop-down list.
7. Select or clear the check boxes for automatic date adjustment as required.
8. Select or enter a date and time up to which recurring sessions will be created.
9. Click **Clone**. The Catalog Editor returns to the session properties for the original (cloned) session.
10. To edit a newly created session, select it from the drop-down list in the Session Properties tab. You may need to select its session status to see it in the list.

Set the Session Properties and Utilities

Once you have created a session, you can set the properties and Utilities.

Learning Module Session Properties

Learning Module Session Utilities

Learning Module Session Properties

Edit Session

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Self-Training (Paper), Self-Training (Video), Task, Virtual Classroom, Workshop/Seminar*

To edit the main session properties

1. Click **Edit session**.
2. Configure the module session as appropriate. For detailed information about configuration fields, please see Session Properties.
3. Click **Save**.

Session Module Assignment

Applicable Learning Types: *Program*

When setting up learning programs (i.e., learning modules designated as Program learning type), you'll assign the session modules on the Session Module Assignment page.

To configure module properties for catalog setup

1. Click **Assign Module** in Session Setup.
2. Configure the module assignment as appropriate. For detailed information about configuration field, please see Session Module Assignment Field Reference.
3. Click **Save**.

Edit Session Class Schedule

Applicable Learning Types: *Classroom, Virtual Classroom, Workshop/Seminar*

The schedule of classes for the session is configured on the **Edit session class schedule** page. The page provides a planner that can guide you to available venues, resources and instructors for the section classes.

To manage class schedules

1. Click **Edit session class schedule**. The Classroom-Based Event Details display at the top of the page. The **Start Date** and **End Date** fields will be populated automatically as you add classes to the session. If there are multiple classes in the session these dates will reflect the date of the first class and the date of the last class.
2. Scroll to the Class Schedule section and lick **Add new**.

3. At the top of the page you can select the class dates, location, class size, etc. As you configure these fields, the planner (located below the fields) updates to display the selections.

> Although you can configure a single class to span several days, it is recommended that classes start and end on the same day, and that you create separate class schedules for different days.

4. Enter the start and end dates and times for the class.
5. Click **Go**. The planner automatically shifts to the week containing the start date. If the necessary resources aren't available for the chosen date, you can click "Previous Fit" or "Next Fit" to find the nearest date before or after the preferred date, respectively, when the resources are available.
6. In the **Location/Room** Section configure the location of the class.
   - To book a class in a venue not linked to a configured training center, choose "Venue." Then, input the venue name and room name (if applicable).
   - To schedule a class in a configured training center, select "Training Center" and choose an option from the drop-down list.
7. Optionally input the minimum and maximum class size for a training center. Training centers with capacities outside of this range will be excluded from the list of selectable venues. Note: The minimum and maximum class sizes for venues are defined in the Facilities section for the training center.
8. Choose your options in the planner. Note: A horizontal bar in the planner signifies a booked venue or resource during a specific time slot. A yellow bar indicates a booking for the current course session, while a red bar indicates a booking for another course session. Further details about the booking are revealed when hovering over the horizontal bar.
   - **Venue/Room** - Venues associated with the chosen training center are listed here. Click on the corresponding radio button to assign a venue.
   - **Instructors** - If instructors have been previously added on the session's Instructor page, they will automatically appear here. You can also select additional instructors. Click the + icon to open the Select Instructors window. Find and choose the relevant instructors. This step simply adds them to the list. To assign instructors to the class, check the box next to their name(s).
   - **Resources** - Here, you'll find resources linked to the training center. Simply indicate the quantity of each resource you need for the class.

9. Click **Book Selected Resources**. When you close the "Schedule a New Class" window, you'll be directed back to the "Session Class Schedule" page, where the newly scheduled class will appear in the Class Schedule list.
10. Repeat these steps to create additional classes for the session.
11. The Start Date and End Date fields in the Classroom-Based Event Details section now show the class dates. To adjust the time zone, choose an option from the Time Zone field. For specifying the class schedule's geographic region, select an option from the Geographic Region field.
12. By default, the session will continue to be visible in the catalog and to instructors even after its end date. To change the default, click the box labeled "Automatically update event status to Ended when End Date day is reached."
13. Click **Save**.

Enrollment Restriction

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Task, Virtual Classroom, Workshop/ Seminar*

Enrollment restrictions enable you to restrict course enrollments within a set date range based on organization and/or job profile. Multiple rules can be configured targeting specific organizations and job profiles, allowing varying enrollment limits per organization.

If enrollment is requested outside the configured date range for the module, the restriction is not enforced.

By default, enrollment restrictions defined at the module level are applied to its sessions. For each session, you can choose to have no restrictions, keep the module-level restrictions, or define different restrictions.

To configure an enrollment restriction for a session

1. Click **Enrollment Restriction**.
2. Select **Use Session Restriction** from the Restriction Process drop-down list.
3. To set the date range, click the calendar icon in the **Start Date** field to select the start date then click the calendar icon in the **End Date** field to select the end date.
4. In the Rule(s) section, select the organizations affected by the enrollment restriction. At least one organization must be chosen. Click "Select Organization(s)" to open the Organization Selection page in a new window. Select the relevant organizations and click "OK" to add them to the list. To remove an organization, simply deselect it from the list.

5. In the **Limit per Organization(s)** field enter the number of enrollments allowed for the selected organizations.
6. To select the job profiles to which the restriction will apply, click **Select Job Profile(s)** field label and select one or more job profiles in the Selector page.
7. Click the **Save** icon.

Enter Cost Information

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Virtual Classroom, Workshop/Seminar*

Cost information can be configured on the session level. This will override any module-level cost information. Course costs can be charged in a specific currency or to organization token accounts.

> To help with budgeting and planning activities, PeopleFluent recommends assigning a cost to the course, even if participants are not charged. In this case you select **Charged per Registration** for the *Charge Procedure* property and enter the cost to the company, per participant, to run the course.

To configure cost information on the session level

1. Click **Enter cost information**.
2. By default, the session is configured to use the module settings. To configure cost information specifically for the session, select one of the options from the **Charge Procedure** field.
3. Configure the cost information as appropriate. For detailed information about each configuration field, please see Cost Information Field Reference.
4. Click **Save**.

Enter References

Applicable Learning Types: *Classroom, Program, Virtual Classroom, Workshop/Seminar*

The LMS enables you to offer online resources to course participants and instructors. These resources can be links to external files or embedded content like YouTube videos, accessible from various pages including the Course Details, Knowledge Center, and Resource search. References set at the module level aren't automatically applied to sessions, but you can set them up at the session level.

To add references to a module session

1. Click **Enter references**. The **Reference Resources** page opens.

2. Click **Add New Reference**. The Add New Reference modal pop-up opens.
    - To include a file from the Repository, click the Browse icon to open the Repository Manager, where you can select the file.
    - To include a file or embedded content from outside of the LMS, enter the URL.
3. Click the checkbox for **Learner**, **Instructor** or both to determine who can view the resource.
4. Select the Reference Type.
5. Select the check box if you want to include a link to the resource in the catalog, which allows people to download it without having to enroll in the course first.
6. Click **Add** to create the reference to the resource in the LMS.
7. Click **Save**.

Define Session Approver

Applicable Learning Types: *Program*

If a program session requires enrollment approval, administrators can choose up to two individuals to approve enrollments. These selected individuals will receive approval request emails when learners seek enrollment in the program session.

To select up session approvers:

1. Click **Define Session Approver**. The Learning Program Session Approver page opens.
2. Click the **browse** icon to select a session approver. The Select Approver selector page opens in a new window.
3. Select the session approver for the program session. (For more information about selector pages, see the User Selector.)
4. Repeat steps 5 and 6 for a second approver, if required.
5. Click Save.

Participants

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Task, Virtual Classroom, Workshop/ Seminar*

You can access a list of users enrolled in the session on the Participants page. From this page, you can manage participants by performing the following actions:

- Change their overall status for the session
- Update their deadline to complete the course session

- Transfer them to another session
- Send them an email
- Substitute another participant for their enrollment
- Re-enroll them in an alternative session

For On-the-Job learning types, you have the option to designate supervisors. These supervisors can then complete the supervisor assessment exam for the assigned participants, a prerequisite for marking the session as Completed.

To view the list of participants enrolled in a session

1. Click **Participants**.
2. If necessary, use the filter options to filter the list of participants.

To manage the participants in the list

1. For a single participant, select an action from the action menu or select a new overall status from the drop-down list.
2. For multiple participants, check their boxes to select them and select an action from the Bulk Action drop-down list.
3. Click Save.

Instructors

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Task, Virtual Classroom, Workshop/ Seminar*

On the Instructors page, you can set default instructors for the session, which are automatically applied when creating a new class schedule. You can override these defaults during schedule configuration. You have the option to manually select instructors or utilize automatic assignment based on competency qualifications.

> Before designating users as instructors for classroom or virtual classroom sessions, it's recommended to ensure they have a role granting access to relevant LMS features typically associated with the Instructor role.

To assign instructors to class schedules

1. Click **Instructors**.
2. Take one or both of the following actions:
    - Manually assign instructors:

a. Click **Manual Assignment** if it is not already selected, and then click **Select instructors**. The Select Instructors window opens.
b. Select the instructors and click **OK**. (For more information, see User Selector.
c. To remove instructors from the list, select them in the Instructor Configured box and click **Remove instructors**.

- Automatically assign instructors based on their competencies:
  1. Click **Dynamic Assignment.** Begin typing the name of a competency in the text box. As you type, matching competencies are listed so you can select one.
  2. Select a competency from the auto-suggest list.
  3. In the **Required Level** field, select a competency level. This is optional.
  4. Click **Refresh**. Any users who have the required competency are listed under the Current Instructor List heading.

7. Click **Save**.

Configure Email Preferences for a Session

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Task, Virtual Classroom, Workshop/ Seminar*

Email notifications can be triggered for events in classroom or virtual classroom courses, sent to various LMS users such as participants, instructors, and managers. The LMS offers System Default email templates to specify content, recipients, and frequency. Custom email templates can be chosen and configured at the module level. Session-level preferences override module-level settings. If no session preferences are set, module preferences are applied.

To configure the email preferences for each session-related event

1. Click **Email Preferences Setup**.
2. Configure the event emails as necessary. For additional information about each of the events and their configuration options, please see Email Preferences.

   - To select or edit the email template click the Browse button. Locate and open the appropriate template. Review the template and make any updates that will apply to the module only. Alternatively, you can create a new email template.
   - Enter or select any additional configuration options available for each event email.

3. Click the Browse icon for each event to which you would like to assign a custom template. The Email Template Editor opens in a new window.

Cost Accounting Information

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Virtual Classroom, Workshop/Seminar*

You can input extra costs related to the session on the Cost Accounting Information page. These additional costs could cover expenses specific to conducting a course in a particular location, for instance.

To add additional cost accounting information for a session

1. Click **Cost Accounting Information**.
2. To streamline the process of adding multiple items for this session, choose the base currency from the drop-down menu. This selection serves as the default currency for all added items, eliminating the need to specify the currency each time.
3. Configure the first item:
    - **Cost Accounting Category** - Select an option from the drop-down list. Note: Payment Manager handles the management of cost accounting categories. If no categories have been created, you'll need to apply the default category.
    - **Extra Information** - Enter a description for the item. This field is optional, but it is recommended that you enter a value if you are using the default category.
    - **Amount** - Enter an amount for the item.
    - **Currency** - If necessary, select a different currency for the category.
    - **Exchange (FX) Rate** - If you selected a different currency, enter the exchange rate between the base currency and the selected currency.
4. To include additional items, click **Add >>** and repeat the steps above.

View Usage Statistics

Applicable Learning Styles: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Virtual Classroom, Workshop/Seminar*

Access enrollment, withdrawal, completion, and knowledge center usage statistics for the learning program/module via the View Usage Statistics page. Statistics are updated daily, excluding activity from the current day. Use the date fields to filter statistics by specific dates.

Configure Session Checklist Items

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Task, Virtual Classroom, Workshop/Seminar*

You can create checklists for module sessions to monitor preparatory tasks like reserving venues for classroom training, and arranging plane tickets and hotels for participants. These checklists can be created either by generating checklist items within the learning module or by utilizing pre-configured templates.

For information about creating and managing checklist templates, please see Create a Checklist Template.

For greater flexibility in setting deadlines beyond fixed dates, you can adjust the deadline for a session checklist item relative to the session's start or end date. To access this option for online learning modules, ensure that the system configuration setting "In catalog editor, show start date and end date fields for online modules" is enabled.

To create a checklist item

1. Click **Checklist**. **Note**: If there are previously created checklist items that are incomplete, they are displayed by default. You can update which items are displayed by making a selection from the **Item Status** field.
2. Use one of the following methods to configure the learning module's checklist.

   - **Create Checklist Items Directly on the Screen**

     a. Click **+ Create Checklist Item** and select **Create New Item**.
     b. Enter a descriptive name for the item.
     c. Click the Mark as Important checkbox to emphasize the importance of the item.
     d. By default, the creator of the checklist item will be listed as the owner. Use the Browse button to select a different user. Click the **X** to remove a user from the **Owner** field.
     e. To set a deadline for a module checklist item to be completed, select a date from the **Deadline** date picker field.
     f. To send a reminder email to the item owner a specified number of days before the deadline, select the **Send reminder** check box.
     g. Click OK.
     h. Repeat these steps for each checklist item. To delete an item, click on the Action Menu icon and select **Delete**.

i. Click **Save**.

- **Generate a Checklist from a Template**

  a. Click **+ Create Checklist Item** and select **Generate from Template**.
  b. Select a template from the options in the drop-down field.
  c. Click **OK**. Items from the template are added to the checklist. The items can be edited by clicking on the item's Action Menu icon and selection **Edit**. To delete an item, click on the Action Menu icon and select **Delete**.
  d. Click **Save**.

Marking Checklist Items Complete

To manually mark a checklist item as complete, click on the Action Menu icon and choose the "Mark as Completed" option.

Course Coupon

Course Coupons offer learners an alternative enrollment method for specific courses, without having to access them through the catalog. As the course owner, you can create a batch of course coupons for a particular session and allocate them to a reseller (LMS users). The reseller then disseminates the coupon ID to learners via email or other channels. Learners can use this coupon ID on the Course Coupon Enrollment page to enroll directly in the session. Each coupon batch is assigned to a single reseller, and you have the flexibility to generate multiple coupon batches for different resellers.

Course coupon enrollment is available for Learning and eLearning LMS licenses only.

> If you are issuing coupons, ensure that the Course Distribution Notification is configured in the Email Preferences at the module or session level.

To generate a course coupon set

1. Click **Course Coupon**.
2. Configure the first set of coupons:

   - Enter the number of coupons for the coupon set.
   - Enter a value in the **Coupon Prefix** field. **Hint**: If you plan to distribute coupon sets to multiple resellers, you might use the prefix field to identify each one.
   - In the **Number of Random Segments** enter the number of random segments.
   - To assign the reseller, click the Browse button for the **Assign reseller** field and select the user.

- Click the calendar icon for the **Assign expiry date** field to select an expiration date for the coupon.

3. Click **Add more coupon(s)** to add the coupon set to the list and reset the configuration fields to add another coupon set.
4. Repeat the steps above to add a new coupon set.
5. Click the **Save** icon.
6. To edit an existing coupon, click on the Coupon ID. Coupons that have been distributed cannot be deleted.

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Virtual Classroom, Workshop/Seminar*

Reserve a Classroom Resource

Applicable Learning Types: *Classroom, Workshop/Seminar*

You can reserve classroom resources while you configure classroom session. Resources might include any materials needed by the instructor and participants for the training session. You can also view and update your resource reservations in the Resource Planner, and create new resource bookings if required. Reserving a resource for a session stops it from being booked for another session taking place at the same time.

To resource a resource

1. Click **Resource Reservation**.
2. Enter the resource reservation details and click **Add** to add the reservation to the session. Repeat this step for all of the resources you want to reserve for the session.
3. Click Save.

Define Session Security

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Task, Virtual Classroom, Workshop/ Seminar*

Course administrators can set access permissions for a session to specify who can view or modify it. However, you must consider the permissions configured for the learning module. To enable course instructors to manage a particular learning session via the Session Administration page, grant them read-only access to the session. Granting instructors read-only access to the learning module allows them to oversee all sessions within it, eliminating the need for individual session permissions.

For additional information about security options, please see About Session Security.

To configure the permissions for a session

1. Click **Define Session Security**.
2. Click **Permissions**. The Permissions Selector opens.
3. Select the instructors to give read-only access to.
4. Click Save.

Configure Associated Programs

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Task, Virtual Classroom, Workshop/ Seminar*

Course administrators have visibility into program sessions that incorporate the learning module currently being edited in the Catalog Editor. When editing a session, you can allocate it to one or multiple program sessions, adjusting program module settings such as Required and Auto-Enroll. Simply click "+ Add to Program Session" to assign the session to a program session.

To configure associated programs

1. Click **Associated Programs** in the Module Properties tab. The Associated Programs page opens.
2. Select an action from the action menu. The following actions are available:
    - View the program module properties
    - View the program session properties
    - Run a session enrollment update (also available as a bulk action)
    - Update the deadline for participants
    - Edit the association (also available as bulk action)
    - Remove the association

4. Click the **Save** icon to save your changes.

Session Enrollment Update

When modifying a program session's structure, it may be necessary to manually update enrollments to align with the changes. The Session Enrollment Update feature re-runs enrollment processing for the session. Options include:

- Updating enrollments for current participants
- Re-enrolling learners who completed the session previously
- Sending email notifications to affected learners

Progress Tracking Deadline Update

Participants must meet module completion deadlines specified on the Learning Program Session Module Assignment page to maintain On Target progress. Deadlines are fixed at enrollment; changes affect new enrollees only.

- To adjust deadlines for enrolled participants in a program, choose "Update Deadline of Users" from the session's action menu.
- For multiple associated programs, select the programs and choose "Update Deadline of Users" from the Bulk Action menu.

Edit the Association

You have the option to adjust the weighting, order, and credits for one or more modules associated with the program session. Additionally, you can specify its requirement status and initiate an enrollment update.

Remove the Association

When you remove an association with a single associated program, you can run an enrollment update.

Tin Can API

Applicable Learning Types: *Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Task, Virtual Classroom, Workshop/Seminar*

You can set Tin Can (xAPI) activity parameters for the session to filter API Statements based on a specified Activity ID. This filters Statements where the object's objectType is "Activity" or is absent, and the object's ID matches the supplied activity parameter.

For detailed Tin Can API (xAPI) specifications, kindly refer to the Tin Can / xAPI Implementation Guide available through your PeopleFluent representative or by requesting it via the PeopleFluent Support portal: https://support.peoplefluent.com.

Learning Module Session Utilities

Session utilities allow you to set up and execute enrollment processing, as well as preview the Knowledge Center following modifications to the session properties.

Access the Module Session

1. Go to **Manage Center > Learning > Learning Modules**.
2. Locate the appropriate learning module and click the Module Title. The module opens in the Catalog Editor.
3. Click **Session Properties**.
4. Select the appropriate session and click **Go**.

Configure Auto-Enrollment Properties

Course administrators can set the criteria to automatically enroll learners in the session.

When learners are automatically enrolled in a course, payment requests are bypassed, therefore the course is offered for no charge.

To configure the auto-enroll selection criteria

1. Access the appropriate session and click **Auto-Enroll** in the **Session** Properties tab.
2. Select the Valid From and Valid To dates to specify when auto-enrollment can happen.
3. Select the check boxes to allow offline auto-enrollment and to ignore schedule conflicts, if required.
4. Expand the criteria headings (for example, Users/Organization/Role) to select the criteria used to determine which learners are auto-enrolled.
5. Click Set Auto-Enroll Targets. The auto-enrollment settings are saved.
6. To check which users are targeted by the criteria, click Test Auto-Enroll. The Test Auto-Enroll page opens.
7. Select whether test against the first 500 candidate users or all users.
8. Click Test Auto-Enroll. A list of users matching the auto-enrollment criteria is shown.
9. To update the selection criteria, click Auto-Enroll in the Session tab to return to the Auto-Enroll Properties page.
10. To delete the auto-enrollment criteria for a session, click Deactivate. All selection criteria are cleared.

Group Enroll or Withdraw Learners

Course administrators have the option to enroll learners in a course session individually or group them based on roles, organizations, user groups, and user attributes. Group enrollment disregards the enrollment policy set for the learning module and allows bypassing enrollment restrictions on the session.

> When you group enroll learners any payment requests are bypassed, therefore the course is offered for no charge.

Similarly, you can remove learners from an enrollment by using the same criteria for selecting users in group enrollment.

1. Access the appropriate session and click **Group Enroll** in the **Session** Properties tab.
2. Click the **Select participant(s)** link to select the learners to enroll in the session. The User Selector page opens in a new window.
3. Select the learners to include in the group enroll and click **OK** to return to close the User Selector. The learners selected for group enrollment are listed in the *Select participant(s)* box.
4. To group enroll the selected learners, ensure *Group Enrollment* is selected in the Action drop-down list. To group withdraw the selected learners from an enrollment, select **Group Withdraw** from the Action drop-down list.
5. To suppress automatic emails that would normally be sent when the selected learners are enrolled in a session, select the **Suppress automatic emails** check box.
6. To bypass enrollment restrictions and checks for valid enrollment during the group enrollment, select the **Override?** check box.
7. To run prerequisite checks configured for the learning module on the selected learners before enrolling them, select the **Perform prerequisite checks?** check box. Learners who fail to meet the prerequisites are not enrolled.
8. To exclude learners from the group enrollment if it conflicts with another course they are enrolled in, clear the **Ignore Schedule Conflict** check box.
9. Enter the charged cost center, if required for the session.
10. Click **Execute group enroll** to start the group enrollment process. The Group Enrollment status page opens in a new window and lists the learners who were selected for group enrollment and their enrollment status (whether successful or not).

Assign Learners to a Group Training Plan

Course administrators can assign the selected learning module to the training plans for a group learners at once. They can also remove the learning module assignment from the selected learners' training plans.

Upon executing the group training plan assignment, the course appears in the learners' training plans and Career Center. However, learners are not automatically enrolled in the course or its sessions through this process. They can access the Course Details from either the Training Plan or Career Center and enroll accordingly.

To assign learners to a group training plan

1. Access the appropriate session and click Group Training Plan in the **Session** Properties tab.
2. Click the **Select participant(s)** link.
3. Select the learners and click **OK**. The learners selected are listed in the *Select participant(s)* box.
4. To remove the learning module from the selected learners' training plan, select **De-assign this module** from the Action drop-down list. Otherwise, leave it as **Assign this module**.
5. When reassigning a learning module to a learner, the assignment details are automatically updated. To keep previous assignment details like the requested completion deadline, ensure to clear the "Update existing plans" checkbox.
6. To notify the selected learners via email about the addition of the learning module to their training plan, click on the browse icon to choose a suitable notification email template.
7. Optionally, enter a comment that will be visible in the learners' training plans.
8. Choose a priority from the drop-down menu to indicate the importance of the course. This priority will be displayed in the learners' training plans.
9. Optionally, choose a date by which the learners should complete the course. This deadline will be displayed in the learners' training plans.
10. Click **Execute group plan assignment**.

Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Task, Virtual Classroom, Workshop/Seminar

Knowledge Center Preview

Classroom, Coaching, Exam, Online, On-the-Job Training, Program, Self-Training (Paper), Self-Training (Video), Task, Virtual Classroom, Workshop/Seminar

Create and Manage Learning Programs

Learning programs group together related learning modules into a learning curriculum. Learning programs are set up similarly to learning modules, the distinction being that they are assigned the **Program** learning type.

Specifically, learning programs can be configured to do the following:

- Allow or disallow learners to advance to the next module on failing the preceding one - Session Module Assignment/Modules cannot be accessed until all preceding modules are complete/Allow learner to advance to next order on failing preceding learning.
- Hide or show modules blocked by preceding modules - Session Module Assignment/ Modules cannot be accessed until all preceding modules are complete/Hide modules blocked by preceding modules in Learner's Available Modules.
- Configure auto-enrollment and due dates per module (Auto-enroll, Module Completion Deadlines)
- Allow or disallow learners to re-enroll in a failed or expired module - Session Module Assignment/If a learner reaches a FAILED or DEADLINE Expired status for a sub-module.
- Enable access to the Progress Tracker for the program. Module Properties/Enable Progress Tracker

Programs can be set as self-enrollable, allowing administrators to enroll learners individually or in groups. Like learning modules, programs comprise multiple sessions. Learning modules are assigned to each program session, and learners enrolled in a program are automatically enrolled in all its sessions. Sessions can be configured to be completed in specific order or allowed to be completed in any order.

> You have the ability to create composite programs, which are program modules that contain other programs. For additional information, please see Composite Programs.

In this topic, we focus on creating learning programs individually from the Learning Modules screen. For information about bulk importing course data, please see Import Learning Programs via the Data Loader.

> To create and configure learning module sessions, your user role must have the required access to LMS features associated with course administration.

Create a Learning Program

Learning programs are created in the same way as learning modules. Follow the instructions in Create a Learning Module to create the learning program. making sure to select **Program** as the learning type.

Configure and Manage the Learning Program Properties

Learning programs and learning modules have most of their properties in common. Additional information about setting up and managing the properties can be found in the following topics:

- Learning Module Properties - Catalog Set Up
- Learning Module Properties - Access/Enrollment
- Learning Module Properties - Knowledge Center

Create a Learning Program Session

Program sessions are created in the same way as learning module sessions. Follow the instructions in Create a Learning Module Session to create a session.

Configure and Manage the Learning Program Session Properties

Learning programs sessions share most of the same properties with learning module sessions. The primary distinction is that, for learning programs, you will assign learning modules to the session.

Please see Session Module Assignment Field Reference for information about the module assignment fields.

General information about setting up sessions can be found in the following topics:

- Learning Module Session Properties
- Learning Module Session Utilities

Composite Programs

Composite programs are program learning modules that contain other programs. You create composite programs by assigning one or more programs to a program module (in addition to any other learning modules required).

The following restrictions apply when assigning programs to another program:

- Only programs with an active session can be assigned. Programs that do not have at least one session with an *Active* status are not available when assigning learning modules to a program.
- Programs containing the current program cannot be selected (cyclical dependency is not allowed).
- A program cannot be assigned to itself.

Enrollment Approval for Composite Programs

Enrollment approval for composite programs is determined by the parent program. For example, program *P0* contains another program *P1.* If *P0* does not require approval for enrollment, but *P1* does, a learner can enroll in *P0*—and therefore also *P1* and its constituent modules—without approval.

If composite module *P0* requires enrollment approval but its constituent program, *P1*, does not, learners can still enroll in program *P1* without approval.

Enrollment into a composite program can fail if:

- The composite program includes one or more programs in which the learner is already enrolled in a different session.
- The composite program has been configured in such a way that the LMS is unable to calculate a cost.

Waitlist Handling in Composite Programs

Enrollment in a composite program will be put into waiting list if any of the learning modules assigned to the composite program tree are full. Enrollment will only be triggered when someone withdraws from the composite program. Waitlist enrollment processing is based on the chronological order in which learners' enrollments are waitlisted, and is triggered automatically only if the Waitlist Handling property for the program session is set to *Automatic Upgrade*. Otherwise an administrator may handle waitlist enrollments.

Share/credit Enrollment in Composite Programs

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

In composite programs, whether or not a sub-program must be retaken will depend on the settings of the immediate parent program.

Program	Sub-module or program	Share/credit Enrollment Setting
Program 1	Module 1, Module 2	Requires the learner to retake the learning.
Program 2	Program 1, Module 3	Does not require the learner to retake the learning.

For example:

1. Learner enrolls in Program 1 and completes Modules 1 and 2 to complete Program 1.
2. Learner then enrolls in Program 2, which does not require the learner to retake any completed courses, therefore they only need to complete Module 3 to complete Program 2.
3. Learner re-enrolls in Program 1, which requires the learner to retake completed courses, so even though they have completed Module 1 and 2 before, they must complete them again.

Import Courses via the Data Loader

Learning modules can be added, updated and deleted in bulk at module, session and class level via the Course CSV Loader. The Course CSV Loader imports a comma—or semicolon—separated values (CSV) file containing a heading row and any number of data rows. Additional headers and data can be included for custom module and session attributes.

An extract of the first five fields in a Course CSV file as it would appear in a text editor

```
Action,ModuleID,ModuleLearningType,ModuleTitle,ModuleDescription


A,MOD-0123,O,Ethics in the Workplace,"The course is about the application of
moral principles, standards of behavior, or set of values regarding proper
conduct in the workplace as individuals and in a group setting. It teaches
the learners to distinguish between right and wrong in the workplace."
```

Not every heading requires values for importing a Course CSV file, although specific fields must contain values based on the action and type of learning module.

To **add** a new learning module, the following fields in your course template CSV file must have values:

- Action
- ModuleID
- ModuleLearningType

The fields that must be populated with values to **update** or **delete** an existing learning module, session or class are as follows:

- To update or delete a specific class, the ModuleID, SessionID, and the ClassStart and ClassEnd dates must be specified.
- To update or delete a specific session, only the ModuleID and SessionID need to be specified.
- To update or delete a learning module, only the ModuleID is required.

Preparing CSV Files for Import

To prepare a Course CSV file for import, you have two options:

- Download a template CSV file from the Course CSV Loader page and fill in the necessary fields. This template includes any custom module and session attributes. The CSV template available for download from the Course CSV Loader page encompasses any custom module and session attributes.
- Run report R246 or R247 to export one or more courses to a CSV file and update the field values.

If you experience issues importing a CSV file into the LMS, note that Microsoft Excel might apply additional formatting to the file upon opening. To avoid this, consider editing CSV files in a text editor instead. Ensure the data adheres to the required formatting specified in the corresponding CSV Formatting Help.

For detailed information about formatting data for the Course CSV Loader, please see Course CSV Loader Field Reference.

⚠ The values for text area fields, such as ModuleDescription, must be enclosed in double quotation marks (" ") so that they can include punctuation. Do not include commas or semi-colons in other fields as they could be interpreted as a field delimiter (depending on your choice of delimiter at import).

Import Courses with the CSV Loader

These instructions assume that you have a prepared import file ready for use. To add, update or delete courses in the LMS via the Course CSV Data Loader:

1. Go to **Manage Center > Learning > Import > Course CSV Loader**.
2. Click **+ Import CSV file**.
3. Click **Choose File** to select the CSV file to upload.
4. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.
5. Choose the delimiter used to separate fields in your CSV file. It can be either a comma or a semicolon.
6. Click the checkbox if you wish to send notification emails to instructors who are either assigned to or de-assigned from sessions, as per the configuration in the imported CSV file.
7. Choose whether to send learners notification emails, either per session or per module, indicating the availability of new sessions they have expressed interest in within the

course. The sending of notifications is subject to the enrollment policy assigned to the learning module.

8. Click **Preview**. The contents of the CSV file are shown in the Data Loader page.
9. Click **Upload** to import the CSV file. The Summary Report displays the count of records that were successfully imported from the file as well as those that failed.

Import Learning Programs via the Data Loader

Learning programs can be added, updated and deleted in bulk at module, session and class level via the Course CSV Loader. The Course CSV Loader imports a comma—or semicolon—separated values (CSV) file containing a heading row and any number of data rows. Additional headers and data can be included for custom module and session attributes.

An extract of the first four fields in a Program CSV file as it would appear in a text editor

```
Action,ProgramID,ProgramTitle,ProgramDescription


A,PRG-0123,O,Onboarding,"This program is for new starters and takes
you through a number of different courses."
```

You do not need to add values for every heading to import a Program CSV file, but certain fields must have values, depending on the action.

Programs are added, updated and deleted according to the following rules, applied to each row (record) in the CSV file.

Table: Effects of A, U and D actions

Action Value	Effects
A (add)	• If the ProgramID does not exist in the LMS, a new program is created. • If the SessionID does not exist in the LMS, a new session is added (SessionTitle must be specified). Assigned modules are also added based on the ProgramID or SessionID (to be specified in assigned program and event date). • If the SessionID already exists in the LMS, a new assigned module is added based on the ProgramID or SessionID (to be specified in assigned program and event date). • If the SessionID already exists in the LMS and assigned module is already added, the record is not processed.

U (update)	• If the ProgramID does not exist in the LMS, the update is not processed. • If the ProgramID and SessionID do not exist in the LMS, the program module fields are updated. • If the SessionID exists in the LMS, program session fields are updated. If assigned module information exists, the assigned module is updated (even added, if the CourseID is not already assigned).
D (delete)	• If the ProgramID is entered, the program module is removed from the LMS. • If ProgramID and SessionID are entered and not the assigned module CourseID and SessionID, the session is removed from the program. • If ProgramID and SessionID is entered with the assigned module, the assigned module is removed from the session (not the session from the program).

Preparing CSV Files for Import

Two prepare a Program CSV file for import, you have two options:

- Download a template CSV file from the Program CSV Loader page and fill in the necessary fields. This template includes any custom module and session attributes. The CSV template available for download from the Course CSV Loader page encompasses any custom module and session attributes.
- Run report R246 or R247 to export one or more courses to a CSV file and update the field values.

If you experience issues importing a CSV file into the LMS, note that Microsoft Excel might apply additional formatting to the file upon opening. To avoid this, consider editing CSV files in a text editor instead. Ensure the data adheres to the required formatting specified in the corresponding CSV Formatting Help.

For detailed information about formatting data for the Course CSV Loader, please see Program CSV Loader Field Reference.

The values for text area fields, such as ProgramDescription, must be enclosed in double quotation marks (" ") so that they can include punctuation. Do not include commas or semi-colons in other fields as they could be interpreted as a field delimiter (depending on your choice of delimiter at import).

Import Programs with the CSV Loader

These instructions assume that you have a prepared import file ready for use. To add, update or delete courses in the LMS via the Program CSV Data Loader

1. Go to **Manage Center > Learning > Import > Program CSV Loader**.
2. Click **+ Import CSV file**.
3. Click **Choose File** to select the CSV file to upload.
4. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.
5. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.
6. Click the checkbox if you wish to send notification emails to instructors who are either assigned to or de-assigned from sessions, as per the configuration in the imported CSV file.
7. Choose whether to send learners notification emails, either per session or per module, when new sessions become available and they have indicated interest in the course. Notifications are sent subject to the enrollment policy assigned to the learning module.
8. Click **Preview**. The contents of the CSV file are shown in the Data Loader page.
9. Click **Upload** to import the CSV file. The Summary Report displays the count of records that were successfully imported from the file as well as those that failed.

Migrate a Module ID (Learning Object ID)

Migrating the Learning Object ID changes the learning object ID (display ID).

To migrate Learning Object IDs, you user role must have unrestricted access to the Migrate Learning Object ID features in System Roles (Manage Center > Users > System Roles).

To migrate a Learning Object ID

1. Go to **Manage > Learning > Catalog General Settings > Migrate Learning Object ID**.
2. Enter the existing learning object ID.
3. Enter a new unique ID for the learning object. The ID can only contain letters, digits, and the characters "-", "_", ".", "@" and "\". It must not contain spaces. The IDs have a maximum of 85 characters.
4. Click **Execute**. The process may take several minutes to execute, depending on the number of records.

Course Catalogs

Courses can be organized into catalogs and sub-catalogs, allowing them to be grouped by related content. Like folders in a computer's file system, you can create a hierarchical structure. For example, you could have a catalog for accountancy training with sub-catalogs to group courses for each level of certification. Alternatively, you could set up a catalog structure to suit the type of enrollment allowed by courses (i.e. self-enrollable, requires approval, supervisor must enroll, etc.).

Learners can browse and/or search catalogs to locate courses in the Catalog Browser. You can make a catalog accessible to all learners or grant only specific learners access by configuring permissions for a catalog.

There are two types of catalog: those native to the LMS, and Web Catalogs. Currently, PeopleFluent Learning supports Web Catalog integration with Skillsoft and LinkedIn Learning. Please note that Web Catalogs are available in the Learning and eLearning licenses only. For additional information, please contact your PeopleFluent representative.

Course catalogs are created and managed in **Catalog List Maintenance** and assigned to catalogs on the Learning Module level.

Create and Manage LMS Course Catalogs

Assign or Unassign Courses to Catalogs via the Data Loader

Create New Catalogs via the Data Loader

Configure a Skillsoft Web Catalog

Configure a LinkedIn Learning Web Catalog

Create and Manage LMS Course Catalogs

In Catalog List Maintenance, you can create, organize and configure the course catalogs by adding folders and sub-folders to represent catalogs and sub-catalogs. The page contains a default "Top" catalog. A catalog added directly under the "Top" catalog is considered a first-level catalog. Catalogs added below first-level catalogs are considered sub-level catalogs.

In the example below, **Bookkeeping and Payroll** indicates the first-level catalog while **Bookkeeping Courses** and **Payroll Courses** represent the sub-catalogs.

To add and configure course catalogs, your user role must have unrestricted access to the Catalog Manager Features in System Roles (Manage Features > Catalog Manager Features).

Add a Catalog

To add a catalog

1. Go to **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.
2. Browse to the appropriate catalog and right-click it, or right-click Top to add a first-level catalog.
3. Select Add Catalog as a Child.
4. The **Add Catalog as Child** page opens, where you can configure the new catalog properties. For detailed information about the catalog property fields, please see Catalog Properties Field Reference.
5. Click Save.

Clone a Catalog

You can make an exact copy of a catalog using the Clone feature. For example, you may want to make a copy of a catalog to update its courses for a new year. You can clone the current catalog and update the course sessions and schedules.

When you clone a catalog, be sure to manage permissions while you are configuring the new catalog so that it is not visible to users before you are ready.

To clone a catalog

1. Go to **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.
2. Browse to the catalog you would like to clone.
3. Right-click and select **Clone**.
4. Click the **To Target Catalog:** field browse button and select the catalog in which to place the new catalog. If you are creating a first-level catalog, be sure to place it in the "Top" catalog.
5. The **Include course content?** field is selected by default. This will copy the original content to the new catalog. Clear the checkbox if you don't want the content included.
6. The **Keep existing permissions?** field is selected by default. This will copy the original permissions to the new catalog. Clear the checkbox if you don't want the permissions copied.
7. The **Additionally, grant permissions as defined it parent** field determines if a sub-catalog will inherit the parent permissions. Choose an option for the new catalog:

   - **As defined in original** - will automatically set the field to the value in the cloned catalog.
   - **Disabled** - disables the field.
   - **Enabled** - enables the field.

6. Click **Save**.

Set or Edit the Catalog Permissions

Once you have saved a new catalog you can set the access permissions. Users can have read-only or unrestricted access to the catalog.

To configure catalog permissions

1. Go to **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.
2. Browse to locate the catalog you would like to edit. Right-click and select **Edit Catalog Properties**.
3. Click the Permissions button.
4. Set the permissions as required.

Edit Catalog Properties

To edit a catalog's properties:

1. Go to **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.
2. Browse to locate the catalog you would like to edit. Right-click and select **Edit Catalog Properties**.

Edit Catalog Content

Although courses are assigned to a catalog at the Learning Module level, catalog administrators can remove them from a catalog in Catalog List Maintenance.

To edit a catalog's content

1. Go to **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.
2. Browse to locate the catalog you would like to edit. Right-click and select **Edit Catalog Content**.
3. Select the check boxes of the courses you want to remove from the catalog.
4. Click **Save**. The course is removed from the catalog and the window closes.

Move a Catalog

You can move a catalog from its parent catalog to another in the catalog structure, thus moving where it is shown in the Catalog Browser.

To move a catalog

1. Go to **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.
2. Browse to locate the catalog you would like to move. Right-click and select **Move**.
3. Click the **To Target Catalog:** field browse button and select the catalog to which to move the catalog. If you moving the catalog to be a first-level, be sure to place it in the "Top" catalog.
4. The **Include course content?** field is selected by default. This will move the original content to along with the catalog. Clear the checkbox if you don't want the content moved.
5. The **Keep existing permissions?** field is selected by default. This will move the original permissions along with the catalog. Clear the checkbox if you don't want the permissions moved.

6. The **Additionally, grant permissions as defined it parent** field determines if a sub-catalog will inherit the parent permissions. Choose an option:

    - **As defined in original** - will automatically set the field to the value to the value in the new parent.
    - **Disabled** - disables the field.
    - **Enabled** - enables the field.

6. Click **Save**.

Delete a Catalog

When you delete a catalog, courses that were assigned to it in the Catalog Editor are no longer assigned to it.

To delete a catalog

1. Go to **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.
2. Browse to locate the catalog you would like to delete. Right-click and select **Delete**.
3. Confirm the deletion.

Assign Random Images to LMS Catalogs

You can assign library stock images randomly to catalogs and courses that have no images assigned to them. The library images are supplied with the LMS. This can be useful for testing, demos and quickly populating large collections of courses and catalogs. Items with images already assigned are not affected.

To assign library pictures randomly

1. Go to **Manage Center > Learning > Catalog General Settings > Catalog List Maintenance**.
2. Scroll to the bottom of the page and click **Assign Random Images**. You are asked to confirm this action. The number of items assigned an image is shown briefly at the top of the page.

Assign or Unassign Courses to Catalogs via the Data Loader

Courses can be assigned in bulk using the Catalog Assignment CSV Loader.

Create the CSV Import File

To create the CSV import file:

1. Go to **Manage Center > Learning > Import > Catalog Assigment CSV Loader**.
2. Download the CSV file template.

Prepare the File for Import

Once you have created the CSV import file, you prepare it for import by entering the necessary values in the fields. Catalog Assignment CSV files have the following delimited fields, which are all required when assigning courses to catalogs via the import.

- Action
- CourseID
- Catalog Name

Enter one course ID and one catalog name per row. To assign a course to a catalog, set the Action column to Add. To unassign a course from a catalog, set the Action to Delete. In the Catalog Name field, you must specify the full hierarchy down to the sub-catalog level to which you are assigning the course. Each level is separated by a forward slash (/). For example, WorldCorp/EMEA/Sales.

Note that CSV files are likely to be opened by Microsoft Excel if it is installed on your system. If you encounter any problems with importing a CSV file into the LMS, it could be caused by Microsoft Excel applying extra formatting to the file. Alternatively, you can edit CSV files in a text editor instead of Microsoft Excel. The data should conform to the formatting required by the template as specified in the corresponding CSV Formatting Help.

If the values for text area fields include punctuation, these fields must be enclosed in double quotation marks (" "). Do not include commas or semicolons in other fields as they could be interpreted as a field delimiter (depending on your choice of delimiter at import).

Administrators can assign courses in the LMS to existing or new catalogs in bulk via the Catalog Assignment CSV Loader, or just create one or more catalogs without assigning courses to them. You can also remove courses from catalogs by setting the Action to *Delete*.

Action and Catalog Name are always required. CourseID is required when you want to assign a course to a catalog, or remove it from a catalog.

Import Catalog Assignments

To import catalog assignments

1. Go to **Manage Center > Learning > Import > Catalog Assigment CSV Loader**.
2. Click **+ Import CSV file**.
3. Click **Choose File** to select the CSV file to upload.
4. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.
5. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.
6. Select the catalog display format from the drop-down list. The selected format will be applied to each catalog specified in the CSV file.
7. If your CSV file contains new catalogs, select the **Create any new catalogs found in the CSV file** check box.
8. Click **Preview**. The contents of the CSV file are shown in the Data Loader page so that you can review the data before importing the file.
9. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
10. If any records failed to import, you can go back to the Catalog Assignment CSV Loader page and click the **CSV Error Report** link for the failed import. The error report downloads to your desktop as a copy of the imported file that includes the error message.

Create New Catalogs via the Data Loader

Course catalogs can be added or deleted in bulk via the Catalog Assignment CSV Loader.

Create the Import File

To create the CSV import file:

1. Go to **Manage Center > Learning > Import > Catalog Assigment CSV Loader**.
2. Download the CSV file template.

Prepare the File for Import

Once you have created the CSV import file, you prepare it for import by entering the necessary values in the fields. Catalog Assignment CSV files have the following delimited fields. When adding or deleting catalogs, only the Action and Catalog Name fields are required.

- Action
- CourseID
- Catalog Name

Enter one Catalog Name per row. Set the Action field to Add. In the Catalog Name field, you must specify the full hierarchy down to the sub-catalog level to which you are assigning the course. Each level is separated by a forward slash (/). For example, WorldCorp/EMEA/Sales.

Note that CSV files are likely to be opened by Microsoft Excel if it is installed on your system. If you encounter any problems with importing a CSV file into the LMS, it could be caused by Microsoft Excel applying extra formatting to the file. Alternatively, you can edit CSV files in a text editor instead of Microsoft Excel. The data should conform to the formatting required by the template as specified in the corresponding CSV Formatting Help.

If the values for text area fields include punctuation, these fields must be enclosed in double quotation marks (" "). Do not include commas or semicolons in other fields as they could be interpreted as a field delimiter (depending on your choice of delimiter at import).

Import New Catalogs

To import new catalogs

1. Go to **Manage Center > Learning > Import > Catalog Assigment CSV Loader**.
2. Click **+ Import CSV file**.
3. Click **Choose File** to select the CSV file to upload.

4. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.
5. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.
6. Select the catalog display format from the drop-down list. The selected format will be applied to each catalog specified in the CSV file.
7. Select the **Create any new catalogs found in the CSV file** check box.
8. Click **Preview**. The contents of the CSV file are shown in the Data Loader page so that you can review the data before importing the file.
9. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
10. If any records failed to import, you can go back to the Catalog Assignment CSV Loader page and click the **CSV Error Report** link for the failed import. The error report downloads to your desktop as a copy of the imported file that includes the error message.

Configure a Skillsoft Web Catalog

In order to offer Skillsoft training through the LMS, the content must be imported. Generally, Skillsoft clients subscribe to thousands of courses, so it is not practical to import course data manually. Instead, Skillsoft uses a service framework called Open Learning Services Architecture (OLSA) to share he catalog and course information with the LMS.

Web catalogs are synchronized with the third-party catalogs to ensure that they are always up-to-date. You can allow the content to be included in the Catalog Search results. Like regular LMS catalogs, Web Catalogs have access permissions to specify who can view them and edit them.

Please note that Web Catalogs are available in the Learning and eLearning licenses only. For additional information, please contact your PeopleFluent representative.

Prerequisite: You will need the Skillsoft URL, Customer ID and Shared Secret in order to perform this task. Have this information handy.

To import learning content into web catalogs, your user role must have unrestricted access to the Content Package, AICC Course Structure, Resource, Web Catalogs and PENS Import feature in System Roles (Manage Features > Catalog Manager Features).

Add a Skillsoft Web Catalog

To add a Skillsoft Web Catalog

1. Go to **Manage Center > Learning > Catalog General Settings > Web Catalogs**.
2. Click **+ Add Skillsoft Web catalog**.
3. In the **Name** field, enter the name for the Skillsoft catalog. This is the name learners will see in the Catalog Browser and Catalog Search results.
4. In the **Endpoint** field, enter the URL of the Skillsoft server providing the catalog information.
5. In the **Customer ID** field, enter your Skillsoft customer ID.
6. In the **Shared Secret** field, enter the shared secret provided by Skillsoft for your organization's account.
7. Select the **Include OLSA Search and Learn categories in Universal Search** check box if you want to include additional Skillsoft course information in standard searches.

8. Configure where newly downloaded courses will be saved after synchronization with Skillsoft:

    - **The Skillsoft-defined catalog hierarchy to be placed under this parent catalog** - choose this option assign downloaded courses to the Skillsoft-defined catalog structure and locate it under a specific parent catalog in the LMS. Click **Select catalog** to select the parent catalog.
    - **This specific catalog** - choose this option to assign the downloaded courses to a specific parent catalog in the LMS, disregarding the catalog structure specified by Skillsoft. Click **Select catalog** to choose the appropriate catalog.

9. The *Catalog synchronization handling for existing courses* options specify how course updates for existing Skillsoft courses are assigned to catalogs in the LMS. Select one of the following options:

    - **Preserve existing catalog assignments** - Skillsoft courses downloaded with the same course ID as an existing course are assigned to the same catalog they are currently or previously assigned to in the LMS.
    - **Add the catalog assignment defined above to existing assignments** - Downloaded courses are assigned to LMS catalogs using the catalog assignment handling configured above for new courses, *in addition to any current catalog assignments*. This option preserves existing catalog assignments *and* assigns the downloaded courses to catalogs using the option specified for assigning new courses.

9. Click **Save**. The new Web Catalog is added to the Web Catalogs page.

Set Permissions for the Skillsoft Catalog

To set permissions for the Skillsoft catalog:

1. Go to **Manage Center > Learning > Catalog General Settings > Web Catalogs and** locate the appropriate catalog.
2. Click on the action menu and select **Permissions**.
3. Configure the permissions as required.

Refresh a Catalog

Refreshing a Web Catalog keeps the courses registered in the LMS synchronized with courses hosted by the third-party course suppliers. For Skillsoft, the catalogs are updated according to their synchronization settings.

When the catalog update is complete, the Last Update column on the Web Catalogs list page is refreshed to reflect the date.

To refresh a Skillsoft catalog

1. Go to **Manage Center > Learning > Catalog General Settings > Web Catalogs and** locate the appropriate catalog.
2. Click the action menu and select **Refresh**. Alternatively, click **Refresh All** at the top of the screen to refresh all of the Web Catalogs.

Delete a Catalog

When you delete a Web Catalog, you can choose to delete all courses and training records associated with it.

To delete a Skillsoft catalog

1. Go to **Manage Center > Learning > Catalog General Settings > Web Catalogs and** locate the appropriate catalog.
2. Click the action menu and select **Delete**.
3. Select the check box if you also want to delete all courses and training records associated with the catalog.
4. Click **OK**.

Configure a LinkedIn Learning Web Catalog

To provide LinkedIn Learning course information the LMS, the course information is integrated via the LinkedIn Learning API. This allows learners to search for and launch courses from the API.

If your organization offers training courses provided by LinkedIn Learning, course administrators can integrate LinkedIn Learning course information with LMS catalogs via the LinkedIn Learning API, so learners can search for and launch courses from the LMS.

Web catalogs are synchronized with the third-party catalogs to ensure that they are always up-to-date. You can allow the content to be included in the Catalog Search results. Like regular LMS catalogs, Web Catalogs have access permissions to specify who can view them and edit them.

Prerequisite: You will need the LinkedIn Client ID, Content Connector Prefix and Secret in order to perform his task. Please have this information handy.

> To import learning content into web catalogs, your user role must have unrestricted access to the Content Package, AICC Course Structure, Resource, Web Catalogs and PENS Import feature in System Roles (Manage Features > Catalog Manager Features).

Add a LinkedIn Learning Web Catalog

To add a LinkedIn Learning Web Catalog

1. Go to **Manage Center > Learning > Catalog General Settings > Web Catalogs**.
2. Click **+ Add LinkedIn Web catalog**.
3. In the **Name** field, enter the name for the LinkedIn Learning catalog. This is the name learners will see in the Catalog Browser and Catalog Search results.
4. In the **LinkedIn Client ID** field, enter the ID provided by LinkedIn.
5. In the **LinkedIn Content Connector Prefix** field enter the connector prefix.
6. In the **LinkedIn** Client Secret field enter the client secret.
7. Click **Save**.

Set Permissions for the LinkedIn Learning Catalog

To set permissions for the LinkedIn Learning catalog:

1. Go to **Manage Center > Learning > Catalog General Settings > Web Catalogs and** locate the appropriate catalog.
2. Click on the action menu and select **Permissions**.

3. Configure the permissions as required.

Refresh a Catalog

Refreshing a Web Catalog keeps the courses registered in the LMS synchronized with courses hosted by the third-party course suppliers.

When the catalog update is complete, the Last Update column on the Web Catalogs list page is refreshed to reflect the date.

To refresh a Web Catalog

1. Go to **Manage Center > Learning > Catalog General Settings > Web Catalogs and** locate the appropriate catalog.
2. Click the action menu and select **Refresh**. Alternatively, click **Refresh All** at the top of the screen to refresh all of the Web Catalogs.

Delete a Catalog

When you delete a Web Catalog, you can choose to delete all courses and training records associated with it.

To delete a Web Catalog

1. Go to **Manage Center > Learning > Catalog General Settings > Web Catalogs and** locate the appropriate catalog.
2. Click the action menu and select **Delete**.
3. Select the check box if you also want to delete all courses and training records associated with the Web Catalog.
4. Click **OK** to delete the Web Catalog.

Course Properties

When creating a learning module or learning module session, there are several properties that can be configured to help define course content and behavior. In many cases, these properties are created and managed directly in the module or session. However, there are many properties that are created in other areas of catalog configuration and then selected within the module or session.

Checklist Templates

Checklist templates are containers for one or more checklist items that you can apply to any number of learning modules or sessions.

Create a Checklist Template

Categories

Categories allow you to group courses by a defined list of categories. This is used primarily to aid catalog administration. Administrators can filter the list of learning modules by category in the Learning Modules page. Learners cannot search the course catalog for courses by category.

Create and Manage Course Categories

Subjects

Subjects group related course topics to help learners search for courses about particular subjects. Users can filter catalog search results by subject and course administrators can use subject to filter the list of learning modules on the Learning Modules page.

Create and Manage Course Subjects

Geographic Regions

Geographic Regions categorize classroom session locations. In the legacy user interface (UI) learners can filter the Course Calendar by region to find courses near them. Learners who have the new UI enabled in their profile see the responsive Course Calendar, which they can filter by timezone rather than region.

Create and Manage Geographic Regions

Vendors

You can create Vendors to identify the companies who produce the training courses available from the LMS. Course administrators can filter the list of learning modules by vendor in the Learning Modules page. Learners can filter Catalog Search results by vendor in the legacy (non-responsive) user interface.

Create and Manage Vendors

Module Custom Attribute Categories

You can create module custom attribute categories to help categorize and organize courses. For example, if you are offering a course that requires PPE, you could create one attribute that specifies that PPE is required and another specify what PPE items are required. **Module custom attribute categories** can be used for both learning modules and learning module sessions.

Create and Manage Module Custom Attribute Categories

Session Custom Attribute Categories

You can create session-level custom attribute categories. These are similar to module custom attribute categories, but can only be used on the session level.

Create and Manage Session Custom Attribute Categories

Virtual Classroom Accounts

When setting up a learning module with the Virtual Class room learning type (live webinar or video conference) a Virtual Classroom Account can be assigned by the course administrator. Virtual Classroom Accounts can use out-of-the-box generic types such as GoTo Meeting, WebEx Meeting and Microsoft Teams. They can also integrate with the virtual software such as Adobe Connect, Vitero and non-meeting account types for WebEx and GoTo Meeting.

Create and Manage Virtual Classroom Accounts

Transcript Attribute Categories

You can create custom transcript attribute categories to include in learners' transcript details for courses they have enrolled in.

Create and Manage Transcript Attribute Categories

Transcript Statuses

A learner's transcript status indicates the current status of their enrollment in a course session (for example, *Not Started*, *In Progress*, and *Completed*). The LMS comes with a set of default transcript statuses that cannot be edited. You cannot create new transcript statuses but you can create sub-statuses, to provide extra detail for the default statuses.

Manage Transcript Statuses

Enrollment Policies

Enrollment policies determine the enrollment process for learners, including withdrawal procedures, required information, and notification templates. You can establish approval-based enrollment policies for courses needing manager approval.

Create and Manage Enrollment Policies

Manage Auto-Enrollment

Assessment Workflow Templates

Assessment workflow templates consist of one or more pre- or post-course assessments that can be assigned to participants, instructors or direct appraisers. These templates are created in the Assessment Workflow Manager and accessed by learners and instructors in the Knowledge Center. Direct appraisers access assessments from the Supervisor Assessments page.

Create and Manage Assessment Workflow Templates

Create a Checklist Template

Checklist templates are containers for one or more checklist items that you can apply to any number of learning modules or sessions. This saves time as you can create common checklist items once and apply them multiple times instead of having to re-create them each time. Course administrators can create a checklist template.

To create a checklist template

1. Go to **Manage Center > Learning > General Catalog Settings > Checklist Template**.
2. Click **+ Create Checklist Template** or, to edit an existing template, click the template name in the list.
3. Enter a descriptive name for the template in the Template Name field.
4. Click **+ Create Checklist Item** to add an item to the template. The Create Item dialog opens. You can add any number of checklist items, configuring them one at a time.
5. Configure the checklist item fields.
6. Repeat steps 4 and 5 until you have added all of the required checklists items to the template.
7. To edit a checklist item in the template, select **Edit** from its action menu.
8. To delete a checklist item from the template, select **Delete** from its action menu. When you delete a template the checklists created from that template are not deleted from the modules or sessions they have been added to.
9. Click **Permissions** to configure the read-only and unrestricted access to the template. Read-only permission allows LMS users to view the template and use it to generate checklists in the Catalog Editor. Unrestricted permission allows users to edit the template checklist items in addition to using templates in the Catalog Editor.
10. Click **Save** to save the template. Course administrators can now generate checklist items from the template.

Create and Manage Course Categories

The Categories feature allows you to group courses by a defined list of categories. This is used primarily to aid catalog administration. Administrators can filter the list of learning modules by category in the Learning Modules page. Learners cannot search the course catalog for courses by category.

Create a Category

To create a category

1. Go to **Manage Center > Learning > Catalog Configuration > Categories**.
2. Click **+ Create Category**.
3. Enter a name for the new category and click **Save**.

Set the Category Permissions

Once you have saved a category, you can assign permissions.

To set the category permissions

1. Go to **Manage Center > Learning > Catalog Configuration > Categories**.
2. Locate the appropriate category.
3. Click the action menu and select **Permissions**.
4. Set the permissions as required.

    - Users with **read-only** permissions can see a category, use it as search criteria in the Learning Modules page and assign it to a learning module.
    - Users with **unrestricted access** to a category can update or delete it, and also update the permissions.

Edit a Category

You can edit a category's name. When you do so, the change of name is reflected in the Catalog Search results filters, in the Learning Modules page *Category* filter, and in the Catalog Editor for all learning modules it is assigned to.

To edit a category

1. Go to **Manage Center > Learning > Catalog Configuration > Categories**.
2. Locate the appropriate category.
3. Click the action menu and select **Edit**.
4. Enter a new name for the category.
5. Click **Save**.

Delete a Category

Categories can be deleted only if they are not in use in a learning module.

To delete a category

1. Go to **Manage Center > Learning > Catalog Configuration > Categories**.
2. Locate the appropriate category.
3. Click the action menu and select **Delete**.
4. Click **OK**. If the category is being used in a learning module, you will get a message that it cannot be deleted.

Create and Manage Course Subjects

Subjects group related course topics to help learners search for courses about particular subjects. Users can filter catalog search results by subject and course administrators can use subject to filter the list of learning modules on the Learning Modules page.

Create a Subject

To create a subject

1. Go to **Manage Center > Learning > Catalog Configuration > Subjects**.
2. Click **+ Create Subject**.
3. Enter a name for the new subject.
4. Click **Save**.

Set the Subject Permissions

Once you have saved a subject, you can assign permissions

To set the subject permissions

1. Go to **Manage Center > Learning > Catalog Configuration > Subjects**.
2. Locate the appropriate subject.
3. Click the action menu and select **Permissions**.
4. Set the permissions as required.

    - Users with **read-only** permissions can filter catalog search results by subject, use a subject as search criteria and assign a subject to a learning module.
    - Users with **unrestricted access** to a subject can update or delete it, and also update the permissions.

Edit a Subject

You can edit a subject's name. When you do so, the change of name is reflected in the Catalog Search results filters, in the Learning Modules page *Subject* filter, and in the Catalog Editor for all learning modules it is assigned to.

To edit a subject

1. Go to **Manage Center > Learning > Catalog Configuration > Subjects**.
2. Locate the appropriate subject.
3. Click the action menu and select **Edit Subject**.
4. Enter a new name for the subject.
5. Click **Save**.

Delete a Subject

Subjects can be deleted only if they are not being used by a learning module.

To delete a subject

1. Go to **Manage Center > Learning > Catalog Configuration > Subjects**.
2. Locate the appropriate subject.
3. Click the action menu and select **Delete Subject**.
4. Click **OK**. If the subject is being used in a learning module, you will get a message that it cannot be deleted.

Create and Manage Geographic Regions

Geographic Regions categorize classroom session locations. In the legacy user interface (UI) learners can filter the Course Calendar by region to find courses near them. Learners who have the new UI enabled in their profile see the responsive Course Calendar, which they can filter by timezone rather than region.

Create a Geographic Region

To create a geographic region

1. Go to **Manage Center > Learning > Catalog Configuration > Geographic Regions**.
2. Click **+ Create Geographic Region**.
3. Enter a unique code for the region. This field is mandatory.
4. Enter a descriptive name for the region.
5. Click **Save**.

Set the Geographic Region Permissions

Once you have saved a geographic regions, you can assign permissions

To set the geographic region permissions

1. Go to **Manage Center > Learning > Catalog Configuration > Geographic Regions.**
2. Locate the appropriate subject.
3. Click the action menu and select **Permissions**.
4. Set the permissions as required.

   - Users with **read-only** permissions can filter the legacy UI Course Calendar by the geographic region, filter the list of sessions in the Session Administration tab and assign it to a classroom session in the Catalog Editor and Course CSV loader.
   - Users with **unrestricted access** to a geographic region can update or delete it, and also update the permissions.

Edit a Geographic Region

When you edit a geographic region you can change its code or display name.

To edit a geographic region

1. Go to **Manage Center > Learning > Catalog Configuration > Geographic Regions**.
2. Locate the appropriate Geographic Region.
3. Click the action menu and select **Edit Geographic Region**.
4. Update the Code or Display Name as required.

5. Click **Save**.

Delete a Geographic Region

To delete a geographic region

1. Go to **Manage Center > Learning > Catalog Configuration > Geographic Regions**.
2. Locate the appropriate Geographic Region.
3. Click the action menu and select **Delete Geographic Region**.
4. Click **OK**.

Create and Manage Vendors

You can create Vendors to identify the companies who produce the training courses available from the LMS. Course administrators can filter the list of learning modules by vendor in the Learning Modules page. Learners can filter Catalog Search results by vendor in the legacy (non-responsive) user interface.

> To create, edit and delete vendors, your user account must have a system role with unrestricted access to the *Catalog Configuration* feature in System Roles (Catalog Manager Features > Catalog Configuration).

Create a Vendor

To create a vendor

1. Go to **Manage Center > Learning > Catalog Configuration > Vendors**.
2. Click **+ Create Vendor**.
3. Enter the vendor's name.
4. Optionally, click the **browse** icon to select the vendor's logo from the Repository Manager.
5. Select the check box if you want to include the vendor's name and logo (if selected) on the Course Details page.
6. Click **Save**.

Edit a Vendor

When you edit a vendor you can change its name, logo and specify if the Vendor will show on the Course Details page.

To edit a vendor

1. Go to **Manage Center > Learning > Catalog Configuration > Vendors**.
2. Locate the appropriate vendor.
3. Click the action menu and select **Edit Vendor**.
4. Make the required updates.
5. Click **Save**.

Delete a Vendor

To delete a vendor

1. Go to **Manage Center > Learning > Catalog Configuration > Vendors**.
2. Locate the appropriate vendor.

3. Click the action menu and select **Delete Vendor**.
4. Click **OK**.

Create and Manage Module Custom Attribute Categories

Organizations can create their own custom attribute categories to help categorize and organize courses. For example, if you are offering a course that requires PPE, you could create one attribute that specifies that PPE is required and another specify what PPE items are required. Module custom attribute categories can be used for both learning modules and learning module sessions.

To configure module attributes, your user role must have unrestricted access to the *Catalog Configuration* feature in System Roles (Catalog Manager Features > Catalog Configuration).

Create a Module Attribute

To create a module attribute

1. Go to **Manage Center > Learning > Catalog Configuration > Module Attribute Categories**.
2. Click **+ Create New Module Attribute**.
3. In the **Attribute Code** field, enter a unique code for the attribute.
4. In the **Name** field, enter a descriptive name for the attribute. For multi-language systems you can enter the label key that will be used to look up the localized name in the user's preferred language.
5. In the **Type** field, select the type of data represented by the attribute. Module attributes can be any of the following data types, which determine what type of values can be assigned to them:
    - Free text (a single line of text up to 255 characters)
    - Text area (multiple lines of text)
    - Drop-down (select the value from a list). **Note**: You will need to save the attribute before you can add values to the drop-down list.
    - Numeric (In PeopleFluent Learning versions up to and including 21.04, fractional numbers less than *1* must start with a zero; for example, 0.75, not .75).
    - Check box
    - Date (a calendar tool to select a date)
6. If you selected **Numeric** in step 5, select the check box if you want to show the sum of the values when printing or reporting the attribute.

7. In the **Display Areas Settings** section, select the areas where you want the attribute to be available.
8. Click **Save**. The attribute is added to the list in the Module Attributes page.
9. If you selected **Drop-down** in step 5, configure drop-down values.
   a. Scroll down the page and locate the **Module Attribute Values** section
   b. Click **Add New Option**.
   c. Configure the value.
   d. Repeat steps a-c to include additional values.
   e. Click **Save**.
10. Click the **Permissions** button to set the access permissions for the module attribute.

Set the Module Attribute Permissions

Once you have saved a module attribute, you can assign permissions.

To set the module attribute permissions

1. Go to **Manage Center > Learning > Catalog Configuration > Categories**.
2. Locate the appropriate module attribute.
3. Click the action menu and select **Permissions**.
4. Set the permissions as required.

Edit a Module Attribute

You can edit a module attribute to change it's code and display name, change the areas it can be used in the LMS or add/edit/remove available options in drop-down lists.

To edit a module attribute

1. Go to **Manage Center > Learning > Catalog Configuration > Module Attribute Categories**.
2. Locate the appropriate module attribute category.
3. Click the action menu and select **Edit**.
4. Make the updates as necessary.
5. Click **Save**.

Allowed Transitions Between Dynamic Attribute Types

Transition	Effect on objects that have assigned a value to the attribute

From Drop-Down to Free Text	The drop-down attribute value on the object will be changed to the drop-down value code as free text. The possible dynamic attribute values configured for the former drop-down dynamic attribute will be deleted.
From Free Text to Drop-Down	Existing free text values on objects will be used to generate a set of possible dynamic attribute values for the new drop-down dynamic attribute.
From Free Text to Text Area	Existing free text values on objects will be moved to the text area.
From Free Text to Numeric	All free text values on objects will be checked to make sure they are either blank or numeric values before the change is allowed to take place.
From Numeric to Free Text	The numeric values on objects will become free text.
From Text Area to Free Text	Existing text area values on objects will be moved to the free text.

Delete a Module Attribute

To delete a module attribute

1. Go to **Manage Center > Learning > Catalog Configuration > Module Attribute Categories**.
2. Locate the appropriate module attribute category.
3. Click the action menu and select **Delete**.
4. Click **OK**.

Create and Manage Session Custom Attribute Categories

Organizations can create their own session custom attribute categories to help categorize and organize courses. For example, if you are offering a course that requires PPE, you could create one attribute that specifies that PPE is required and another specify what PPE items are required. Session custom attribute categories can only be used on the session level.

> To configure session attributes, your user role must have unrestricted access to the *Catalog Configuration* feature in System roles (Catalog Manager Features > Catalog Configuration).

Create a Session Attribute

To create a session attribute

1. Go to **Manage Center > Learning > Catalog Configuration > Session Attribute Categories**.
2. Click **+ Create New Session Attribute**.
3. In the **Attribute Code** field, enter a unique code for the attribute.
4. In the **Name** field, enter a descriptive name for the attribute. For multi-language systems you can enter the label key that will be used to look up the localized name in the user's preferred language.
5. In the **Type** field, select the type of data represented by the attribute. Session attributes can be any of the following data types, which determine what type of values can be assigned to them:
    - Free text (a single line of text up to 255 characters)
    - Text area (multiple lines of text)
    - Drop-down (select the value from a list). **Note**: You will need to save the attribute before you can add values to the drop-down list.
    - Numeric (In PeopleFluent Learning versions up to and including 21.04, fractional numbers less than *1* must start with a zero; for example, 0.75, not .75).
    - Check box
    - Date (a calendar tool to select a date)
6. If you selected **Numeric** in step 5, select the check box if you want to show the sum of the values when printing or reporting the attribute.
7. In the **Display Areas Settings** section, select the areas where you want the attribute to be available.

8. Click **Save**. The attribute is added to the list in the Session Attribute Categories page.
9. If you selected **Drop-down** in step 5, configure drop-down values.
    a. Scroll down the page and locate the **Session Attribute Values** section
    b. Click **Add New Option**.
    c. Configure the value.
    d. Repeat steps a-c to include additional values.
    e. Click **Save**.
10. Click the **Permissions** button to set the access permissions for the module attribute.

Set the Session Attribute Permissions

Once you have saved a session attribute, you can assign permissions.

To set the session attribute permissions

1. Go to **Manage Center > Learning > Catalog Configuration > Session Attribute Categories.**
2. Locate the appropriate session attribute.
3. Click the action menu and select **Permissions**.
4. Set the permissions as required.

Edit a Session Attribute

You can edit a module attribute to change it's code and display name, change the areas it can be used in the LMS or add/edit/remove available options in drop-down lists.

To edit a module attribute

1. Go to **Manage Center > Learning > Catalog Configuration > Session Attribute Categories.**
2. Locate the appropriate attribute.
3. Click on the action menu and select **Edit**.
4. Make the updates as necessary
5. Click **Save**.

Allowed Transitions Between Dynamic Attribute Types

Transition	Effect on objects that have assigned a value to the attribute

From Drop-Down to Free Text	The drop-down attribute value on the object will be changed to the drop-down value code as free text. The possible dynamic attribute values configured for the former drop-down dynamic attribute will be deleted.
From Free Text to Drop-Down	Existing free text values on objects will be used to generate a set of possible dynamic attribute values for the new drop-down dynamic attribute.
From Free Text to Text Area	Existing free text values on objects will be moved to the text area.
From Free Text to Numeric	All free text values on objects will be checked to make sure they are either blank or numeric values before the change is allowed to take place.
From Numeric to Free Text	The numeric values on objects will become free text.
From Text Area to Free Text	Existing text area values on objects will be moved to the free text.

Delete a Session Attribute

To delete a session attribute

1. Go to **Manage Center > Learning > Catalog Configuration > Session Attribute Categories.**
2. Locate the appropriate attribute.
3. Click on the action menu and select **Delete**.
4. Click **OK**.

Create and Manage Virtual Classroom Accounts

When setting up a learning module with the Virtual Class room learning type (live webinar or video conference) a Virtual Classroom Account can be assigned by the course administrator. Virtual Classroom Accounts can use out-of-the-box generic types such as GoTo Meeting, WebEx Meeting and Microsoft Teams. They can also integrate with the virtual software such as Adobe Connect, Vitero and non-meeting account types for WebEx and GoTo Meeting.

You must have unrestricted access to the *Catalog Manager* feature in System Roles (Manage Features > Catalog Manager Features) in order to configure an account to use virtual classroom based courses.

Prerequisite: Each Virtual Classroom Type will require specific connection information such as URL, username, password, etc. Have the connection information for the type you are creating handy.

Create a Virtual Classroom Account

To configure a virtual classroom account

1. Go to **Manage Center > Learning > Catalog General Settings > Virtual Classroom Account Setup**.
2. Click **+ Create New**.
3. Select the **Virtual Classroom Type** from the drop-down list. The properties required for that type of account are shown.
4. Enter or select the settings for the Virtual Classroom Type you selected. They generally include account and authentication details, which are provided by the vendor.
5. Click **Save**.

Set the Permissions for a Virtual Classroom Account

Once a Virtual Classroom Account has been saved, you can its permissions.

1. Go to **Manage Center > Learning > Catalog General Settings > Virtual Classroom Account Setup**.
2. Locate the appropriate account and click on the name to edit it.
3. Click the **Permissions button.**
4. Set the read-only and unrestricted permissions as appropriate.

Delete a Virtual Classroom Account

1. Go to **Manage Center > Learning > Catalog General Settings > Virtual Classroom Account Setup**.
2. Locate the appropriate Virtual Classroom Account.
3. Click on the action menu and select **Delete**.
4. Click **OK**.

Create and Manage Transcript Attribute Categories

Course administrators can create custom transcript attributes to include in learners' transcript details for courses they have enrolled in. have. These can be included in the transcript details for learners' assigned courses.

You can assign values to transcript attributes in the Transcript Details page for learning modules and in the Group Enrollment page in the Catalog Editor. When learners are group enrolled in a course, the values assigned in the Group Enrollment page are saved to the learners' transcripts. The values can be changed in the Transcript Details page.

> To configure transcript attributes, your user role must have unrestricted access to the *Catalog Configuration* feature in System Roles (Catalog Manager Features > Catalog Configuration).

Create a Transcript Attribute Category

To create a transcript attribute

1. Go to **Manage Center > Learning > Catalog Configuration > Transcript Attribute Categories**.
2. Click **+ Create New Transcript Attribute**.
3. In the **Attribute Code** field, enter a unique code for the attribute.
4. In the **Name** field, enter a descriptive name for the attribute. For multi-language systems you can enter the label key that will be used to look up the localized name in the user's preferred language.
5. In the **Type** field, select the type of data represented by the attribute. Transcript attributes can be any of the following data types, which determine what type of values can be assigned to them:

   - Free text (a single line of text up to 255 characters)
   - Text area (multiple lines of text)
   - Drop-down (select the value from a list). **Note**: You will need to save the attribute before you can add values to the drop-down list.
   - Numeric (In PeopleFluent Learning versions up to and including 21.04, fractional numbers less than *1* must start with a zero; for example, 0.75, not .75).
   - Check box
   - Date (a calendar tool to select a date)

6. If you selected **Numeric** in step 5, select the check box if you want to show the sum of the values when printing or reporting the attribute.
7. In the **Display Areas Settings** section, select the areas where you want the attribute to be available.
8. Click **Save**. The attribute is added to the list in the **Transcript Attribute Categories** page.
9. If you selected **Drop-down** in step 5, configure drop-down values.
   a. Scroll down the page and locate the **Transcript Attribute Values** section
   b. Click **Add New Option**.
   c. Configure the value.
   d. Repeat steps a-c to include additional values.
   e. Click **Save**.
10. Click the **Permissions** button to set the access permissions for the Transcript attribute.

Set the Transcript Attribute Permissions

Once you have saved a transcript attribute, you can assign permissions.

To set the transcript attribute permissions

1. Go to **Manage Center > Learning > Catalog Configuration > Transcript Attribute Categories.**
2. Locate the appropriate transcript attribute.
3. Click the action menu and select **Permissions**.
4. Set the permissions as required.

Edit a Transcript Attribute

You can edit a transcript attribute to change its code and display name, change the areas it can be used in the LMS or add/edit/remove available options in drop-down lists.

To edit a transcript attribute

1. Go to **Manage Center > Learning > Catalog Configuration > Transcript Attribute Categories.**
2. Locate the appropriate transcript attribute.
3. Click the action menu and select **Edit**.
4. Make the updates as necessary.
5. Click **Save**.

Delete a Transcript Attribute

To delete a transcript attribute

1. Go to **Manage Center > Learning > Catalog Configuration > Transcript Attribute Categories.**
2. Locate the appropriate transcript attribute.
3. Click the action menu and select **Delete**.
4. Click **OK**.

Manage Transcript Statuses

A learner's transcript status indicates the current status of their enrollment in a course session (for example, *Not Started*, *In Progress*, and *Completed*).

The LMS comes with a set of default transcript statuses that cannot be edited. You cannot create new transcript statuses but you can create sub-statuses, to provide extra detail for the default statuses. For example:

- *Completed* could be sub-classified as *With Merit* or *With Distinction*
- *Waiver/Exempt* could be sub-classified as *Equivalent Qualification* or *Experience Waiver*
- *Excused* could be sub-classified as *Illness/Injury* or *Bereavement* or *Jury Service*

Transcript statuses are managed in catalog management and assigned in various areas of the LMS by instructors, appraisers, managers and course administrators.

> To create and edit transcript sub-statuses, your user role must have unrestricted access to the *Transcript Status Manager* feature in System Roles (Manage Features > Catalog Manager Features).

Transcript Statuses

Status	Active	Creditable
Not Started	Yes	No
In Process	Yes	No
Waitlisted	No	No
Dropped from Waitlist	No	No
Withdrawn	No	No
Withdraw - Valid Reason	No	No
Withdraw - Invalid Reason	No	No
Withdrawn - Account Closed	No	No
Completed	No	Yes
Completed (Self-Asserted)	No	Yes
Cancelled	No	No

Pending Approval	Yes	No
Approval Denied	No	No
Passed	No	No
Failed	No	No
No show	No	No
Deactivated	No	No
Deadline Expired	No	No
Session Selection Needed	Yes	No
Waiver/Exempt	No	Yes
Excused	No	No

Add a Transcript Sub-Status

Important Note: Sub-statuses inherit access permissions from their parent transaction status.

To create a sub-status

1. Go to **Manage Center > Learning > Catalog Configuration > Transcript Status Manager**.
2. Locate the appropriate status and click the **+ Add Sub-status** link.
3. Enter a unique code for the sub-status.
4. Enter a name for the sub-status. This is the name provided in drop-down lists to select a transcript status, and is the name shown in learners' transcript details and reports.
5. Repeat steps 3 and 4 for additional sub-statuses as required.
6. Click **Save**. The sub-statuses are listed in the Sub-status column in the Transcript Status Manager.

Set the Permissions for the Transcript Sub-Status

To set the permissions

1. Go to **Manage Center > Learning > Catalog Configuration > Transcript Status Manager**.
2. Locate the appropriate sub-status.
3. Click the action menu and select **Permissions**.
4. Set the permissions as appropriate.

Edit Transcript Sub-Status

Sub-statuses can be edited to update the code and display name.

To edit a transcript sub-status

1. Go to **Manage Center > Learning > Catalog Configuration > Transcript Status Manager**.
2. Locate the appropriate sub-status.
3. Click the action menu and select **Edit Sub-Statuses**.
4. Update the code or name of each sub-status as required.
5. Click **Save**.

Delete a Transcript Sub-Status

To delete a transcript sub-status

1. Go to **Manage Center > Learning > Catalog Configuration > Transcript Status Manager**.
2. Locate the appropriate sub-status.
3. Click the action menu and select **Edit Sub-Statuses**.
4. Click the **Remove** button to the right of the **Name** column.
5. Click **OK**.

Create and Manage Enrollment Policies

Enrollment policies determine the enrollment process for learners, including withdrawal procedures, required information, and notification templates. You can establish approval-based enrollment policies for courses needing manager approval. When a learner enrolls, an email is sent to their manager for approval. This approval process can involve multiple steps, such as manager and instructor approval, either concurrently or sequentially. Organizations may opt to enforce an approval process for withdrawals, especially for paid enrollments, through enrollment policies.

The Default Enrollment Policy

The default enrollment policy (Default Policy) is a policy that does not require an approval process. It is assigned to new courses by default and you can use it to allow learners to self-enroll without waiting for the enrollment to be approved by a manager, supervisor or other reviewer.

Organization-Level Enrollment Policies

Organization-level enrollment policies enable approval workflow to be determined by a user's organization rather than requiring all organizations to use the same course-specific enrollment policy.

When enrollment policies are assigned to a course, all users who self-enroll in that course have the same enrollment policy, which may or may not require approval. By contrast an organization-level enrollment policy is assigned at the organization unit level and, optionally, configured in the course enrollment policy as taking precedence over an approval-based policy selected for the course. You can configure an enrollment policy for all organizations that require an organization-based approach to approval workflow.

Users can often belong to a hierarchy of organization units. For example, user A can belong in:

- Sales and Marketing
    - Sales
        - London

Each organization in the hierarchy can have its own enrollment policy, and when determining which policy to use, the LMS works from the bottom of the hierarchy up. In the example above, if the *Sales* and *Sales and Marketing* organization units have their own separate enrollment policies, the LMS would use the policy configured for *Sales* (assuming the organization level policy is configured to take precedence over the approval-based policy assigned to the course).

An organization-level policy will be used for enrollment processing only when all of the following conditions are true:

- The enrollment policy assigned to the course is approval-based (that is, not the *DEFAULT POLICY*).
- An organization-level enrollment policy has been selected for the course.

- The property *Allow a configured organization enrollment policy to take precedence over this course policy* box is checked.

Create a New Enrollment Policy

First, you'll create a new enrollment policy and configure the summary information and details. After you have saved it, you can configure additional details like approval steps and withdrawal procedures.

To create a new enrollment policy

1. Go to **Manage Center > Learning > Enrollment Settings > Enrollment Policy Editor**.
2. Click the **Create Policy** button in the top navigation menu.
3. Enter the policy's summary information and details. For detailed information about the enrollment policy details fields, please see Enrollment Policy Details.
4. Click **Save**.

Edit the Withdrawal Details

You have the option to create parameters related to the withdrawal process within an enrollment policy.

To edit the withdrawal details

1. Go to **Manage Center > Learning > Enrollment Settings > Enrollment Policy Editor**.
2. Select the enrollment policy in the Policies list and choose Edit withdrawal details.
3. Enter the withdrawal details. For detailed information about the withdrawal details fields, please see Withdrawal Details.
4. Click **Save**.

When a learner submits a request to withdraw, a notification is sent to the withdrawal approver and the learner's transcript updates to indicate the request. The learner can still engage in regular program and course activities while waiting for approval, but cannot change course status.

Additional Enrollment Information

You can include fields to collect additional information from learners who enroll. These fields can be optional or mandatory.

To include additional enrollment information

1. Go to **Manage Center > Learning > Enrollment Settings > Enrollment Policy Editor**.

2. Select the enrollment policy in the Policies list and choose Edit additional enrollment information.
3. A list of available fields is provided. Each field shows the field name, field type (text, checkbox, etc.). Some fields cannot be marked as required. When this is the case, the field description will say **Optional Only**.
4. Click the checkbox for each field you would like to include with the enrollment. To make a field mandatory, click **Mark as Required**.
5. Click **Save**.

Add Approval Steps

When setting up or modifying an enrollment policy, you have the option to establish multiple approval steps for learner enrollment in a course. Each stage requires an approver and allows you to specify email templates for request and reminder notifications. Additionally, you can define a deadline for automatic approval or denial of enrollment requests.

To add approval steps

1. Go to **Manage Center > Learning > Enrollment Settings > Enrollment Policy Editor**.
2. Select the enrollment policy in the Policies list and choose (Add a step).
3. Configure the approval step details. For detailed information about the approval step details fields, please see Approval Step Details.
4. Click **Save**.

Learners can monitor the progress of their requests and withdraw pending ones on the Enrollment Requests page. Approvers can review, accept, or reject all pending approval requests at Workspace > Enrollment Approval.

Order the Approval Steps

If the enrollment policy has multiple approval steps, the can be put into a specific order.

To order the approval steps

1. Go to **Manage Center > Learning > Enrollment Settings > Enrollment Policy Editor**.
2. Select the enrollment policy in the Policies list and choose Edit steps ordering.
3. Click the up and down icons to move the steps up or down respectively. The steps are re-ordered instantly, you do not need to save the screen.

Clone an Enrollment Policy

You can clone an enrollment policy to quickly create a new policy with similar details.

1. Go to **Manage Center > Learning > Enrollment Settings > Enrollment Policy Editor**.
2. Select the enrollment policy in the Policies list.
3. Click the **Clone Policy** button in the top navigation menu.

Delete Enrollment Policies

Enrollment policies can be deleted one-at-a-time or you can delete multiple policies in batch. Note that the Default Policy and Default Two-Step policies cannot be deleted.

To delete a single policy

1. Go to **Manage Center > Learning > Enrollment Settings > Enrollment Policy Editor**.
2. Select the enrollment policy in the **Policies** list.
3. Click the **Delete Policy** button in the top navigation menu.

To delete multiple policies:

1. Go to **Manage Center > Learning > Enrollment Settings > Enrollment Policy Editor**.
2. Click the **Batch Delete** icon on the toolbar. The Batch Delete page opens, listing all of the enrollment policies.
3. Select the check boxes of the policies you want to delete and click **Delete**.
4. Click **OK**.

Manage Auto-Enrollment

Auto Enrollment allows organizations to configure specific criteria or targets in advance, and then automatically evaluate and automatically enroll users who match those targets in specific classes. For example, you may want to enroll employees who have been with the company for a certain number of years in a training program. The Auto Enroll feature would periodically check employees' records against this criteria and automatically enroll them when the criteria is met.

Auto enrollment criteria for a course is configured in the course's Learning Module session properties. For more information, please see Learning Module Session Utilities.

General auto-enroll settings and information can be accessed in the Auto-Enroll Console. Here, administrators with unrestricted access can configure settings for the auto-enroll scanning interval, view a list of users that are auto-enrolled and the list of targeted courses, and check the auto-enrollment log.

To update the Auto-Enroll Console settings, your user role must have unrestricted access to the *Auto-Enroll Console* feature in System Roles (Manage Features > Catalog Manager Features).

Criteria Scan Interval

When Online/Login Auto-Enroll is turned on, the system will scan users for course auto-enrollment at login. You can configure the intervals at which auto-enrollments will be processed.

1. Go to **Manage Center > Learning > Enrollment Settings > Auto-Enroll Console**.
2. On the Auto-Enroll Console tab, be sure **Turn on Online/Login Auto-Enroll** is checked.
3. Select an option from the drop-down field to specify when the LMS checks user accounts against auto-enroll criteria:
   - 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

Altering this setting affects the timestamp criteria for each course. You can trigger a re-scan for a particular course by adjusting the selection criteria in the session's Auto-Enroll Properties. Similarly, updating any user properties in the User Editor prompts a re-scan for that user, resetting timestamps for both users and courses.

3. Check the **Enable online SubModule handling** box to include scanning for automatic enrollment into sub-modules within ongoing programs. If this option isn't activated, the

system will still perform this task within the daily "Auto Enroll Offline Sub-module Scan," unless offline auto-enrollment is turned off.

4. Click **Save**.

Offline Bulk Auto-Enroll

Enabling offline auto-enrollment allows users who haven't logged in to be scanned and enrolled in courses, with email notifications sent to them. This feature is disabled by default due to potential impacts on system performance. PeopleFluent suggests using the trickle option, which processes batches of about 1/30 of active users daily, ensuring all users are scanned and enrolled over a one-month period.

1. Go to **Manage Center > Learning > Enrollment Settings > Auto-Enroll Console**.
2. Click **Turn on Offline Bulk Auto-Enroll**.
3. Select an option from the drop-down field to specify when the LMS checks user accounts against auto-enroll criteria:
    - Daily Incremental
    - Trickle Auto-enroll All Active Users Over One Month Period
    - All Active Users Once per Day
    - All Active Users Once per Week
    - All Active Users Once per Month
3. Click Save.

View a List of Users Auto-Enrolled in a Course

In the Auto-Enroll User Listing tab of the Auto-Enroll Console you can select a learning module and enrollment date range to see which users have been enrolled via auto-enrollment. Users who were enrolled manually are not listed.

1. Go to **Manage Center > Learning > Enrollment Settings > Auto-Enroll Console**.
2. Click the **Auto-Enroll User Listing** tab.
3. To choose a learning module, simply click **Select**. This action will open the Selector page in a new window, where you can search for the desired module. Please note that you can only select one module.
4. Select the start and end dates and times of the automatic enrollment.
5. Click **Filter** to list the users who were auto-enrolled.

View the Auto-Enroll Process Log

The Auto-Enroll process log provides an overview of the enrollment processing for the last 30 days. It includes details such as the learners who underwent auto-enrollment, along with information about the learning module, session ID, and the date and time of the auto-enroll processing. In the Message column, you'll find additional information regarding each event, such as confirmation of successful enrollment or notification if the enrollment is pending approval.

1. Go to **Manage Center > Learning > Enrollment Settings > Auto-Enroll Console**.
2. Click the **Auto-Enroll Log** tab.
3. Filter the list as necessary. The following values are available:

    - User Name
    - Learning Module ID
    - Event start and end dates

View Courses Targeted for Auto-Enroll

You can view a list of learning modules with configured auto-enroll criteria. The list can be filtered by module ID and auto-enroll activation date.

1. Go to **Manage Center > Learning > Enrollment Settings > Auto-Enroll Console**.
2. Click the **Targeted Courses** tab.
3. Filter the list as necessary.

View Auto-Enroll Statistics

1. Go to **Manage Center > Learning > Enrollment Settings > Auto-Enroll Console**.
2. Click **Auto-Enroll Statistics**.

Create and Manage Assessment Workflow Templates

Assessment workflow templates consist of one or more pre- or post-course assessments that can be assigned to participants, instructors or direct appraisers. These templates are created in the Assessment Workflow Manager and accessed by learners and instructors in the Knowledge Center. Direct appraisers access assessments from the Supervisor Assessments page.

PeopleFluent recommends using different email templates tailored to the different types of recipient: participant, instructor and direct appraiser.

System administrators can assign system default workflows by organization or logical domain, which can then be disabled or overridden on the session level by a course administrator during setup. Assessment workflows have permissions that determine which users can assign them or edit them in the Assessment Workflow Manager.

To manage assessment workflow templates, your user role must have unrestricted access to the *Catalog Manager* in System Roles (Manage Features > Catalog Manager Features).

Create an Assessment Workflow Template

To create an assessment workflow template

1. Go to **Manage Center > Learning > Catalog General Settings > Assessment Workflow Manager**.
2. Click **+ Create Assessment Workflow**.
3. Enter a name for the assessment workflow template. This is the name shown in the Workflow Template drop-down lists when assigning a workflow template to a session, organization or logical domain.
4. Click the **Add exam/evaluation** link.
5. Click the **browse** icon to select an assessment.
6. Choose whether the user will be notified to complete the assessment before or after the course.
7. Select the date from which the assessment will be available to the users. This is defined by the number of days before or after the course start or end date.
8. Select the recipient of the reminder email to complete the assessment. This can be course participants, instructors or the participants' direct appraisers.
9. Click the **browse** icon to select the email template for the reminder. Reminder emails are only sent to users who have not completed the assigned exam or evaluation. These

reminders will continue until the exam is completed or the expiry date is reached, whichever comes first.

10. Specify how often the reminder email should be sent after the assessment becomes accessible.
11. Repeat steps 4 to 10 to add more assessments to the workflow template.
12. Click **Save**.
13. Click **Permissions** to configure the assessment workflow template's access permissions. You must grant read-only access to administrators who need the ability to assign the workflow template to sessions, organizations, or logical domains.

Edit an Assessment Workflow Template

To edit an assessment workflow template

1. Go to **Manage Center > Learning > Catalog General Settings > Assessment Workflow Manager**.
2. Locate the appropriate template and click on the template name to open it for editing.
3. Make updates as necessary.
4. Click Save.

Delete an Assessment Workflow Template

To delete an assessment workflow template

1. Go to **Manage Center > Learning > Catalog General Settings > Assessment Workflow Manager**.
2. Locate the appropriate template and click on the template name to open it.
3. Click the Delete button.
4. Click OK.

Class Resources

Class Resource Management involves managing materials, training spaces and other assets, and booking those items for classes, in the LMS. Class resources are set up in the Class Resource Manager and then assigned in the learning modules and sessions.

General Class Resources

These are any materials needed by the instructor or participants for classroom-based training sessions; projectors, flip charts or laptops, for example. They are specific to a training center or facility, restricting them to a particular location.

Create and Manage General Class Resources

Class Resource Attributes

Class Resource Attributes capture the general properties applicable to class resources. For example, projectors may have different input options, such as VGA, DVI-D and HDMI. The input types available on each projector can be specified with a class resource attribute that has a checkbox for each input type.

Create and Manage Class Resource Attributes

Holiday Calendars

Holiday calendars are used to determine when training centers, instructors and class resources are unavailable due to holidays or other reasons. You can configure multiple holiday calendars, each with their own set of unavailable dates and linked training centers. For example, if your organization runs classroom training sessions in multiple countries, you may wish to configure a holiday calendar for each country.

Create and Manage Holiday Calendars

Training Centers

Training centers represent a physical location with associated collections of facilities, rooms and class resources. Training centers can be assigned to classroom-based class schedules, enabling users to book its available facilities and resources.

Create and Manage Training Centers

Facilities

Facilities represent rooms located at a training center. Within a facility, you can specify the location, the seating arrangements and audio and video equipment available for that room. You can associate one or more facilities with a training center. When that training center is selected for a classroom-based class schedule, associated facilities can be booked for the class. Or, it can be selected for a simple booking reservation.

Create and Manage Facilities

Instructors

Instructors are the LMS users who are qualified to teach specific learning modules. Catalog administrators can create instructors and assign them to the learning modules they are qualified to teach. You can also auto-populate the instructor list with LMS users who are currently assigned as instructors for classroom sessions.

Create and Manage Instructors

Events

You can schedule events for class resources, facilities and instructors to book them for a specific date.

Create and Manage Events

The Resource Planner

The Resource Planner displays the event schedules of facilities, instructors and resources. It helps you to plan and create resource bookings for classroom training sessions. Event bookings are displayed on a grid, with a column for each date and a row for each resource. You can view the schedule on a daily, weekly or monthly basis.

The Resource Planner

The Class Resources Calendar

The Class Resources Calendar shows the scheduled bookings for selected facilities, instructors and class resources in a calendar format. Booking events for facilities and class resources can be created and edited in the calendar.

The Class Resources Calendar

Create and Manage General Class Resources

Class resources are any materials needed by the instructor or participants for classroom-based training sessions; projectors, flip charts or laptops, for example. They are specific to a training center or facility, restricting them to a particular location.

To manage class resources, your user role must have unrestricted access to the *Class Resource Manager* feature in System Roles (Manage Features > Catalog Manager Features).

Create a Class Resource

To create a class resource

1. Go to **Manage Center > Learning > Class Resource Manager > Class Resources**.
2. Click **+ Create Resource**.
3. Enter the class resource details. For detailed information about class resource fields, please see Class Resource Details Reference.
4. Click **Save**.

View a Class Resource Schedule

To view scheduled events for a class resource

1. Go to **Manage Center > Learning > Class Resource Manager > Class Resources**.
2. Locate the appropriate class resource.
3. Click the action menu and select **View Schedule**.

Schedule Events for a Class Resource

You can schedule "Events" for class resources to book them for a specific date. From here, you can also create a new module session, booking the resource at the same time.

To create an event

1. Go to **Manage Center > Learning > Class Resource Manager > Class Resources**.
2. Locate and open the appropriate class resource.
3. Click on the **Schedule** tab.
4. Click **+ Create Event**.
5. Configure the event. For additional information about configuring and managing events, please see Create and Manage Events.

Edit a Class Resource

To edit a class resource

1. Go to **Manage Center > Learning > Class Resource Manager > Class Resources**.
2. Locate the appropriate class resource.
3. Click the action menu and select **Edit Resource Details**.
4. Make the edits as necessary.
5. Click **Save**.

Delete a Class Resource

To delete a class resource

1. Go to **Manage Center > Learning > Class Resource Manager > Class Resources**.
2. Locate the appropriate class resource.
3. Click the action menu and select **Delete**.
4. Click **OK**.

Create and Manage Class Resource Attributes

Class Resource Attributes capture the general properties applicable to class resources. For example, projectors may have different input options, such as VGA, DVI-D and HDMI. The input types available on each projector can be specified with a class resource attribute that has a checkbox for each input type.

> To manage class resource attributes, your user role must have unrestricted access to the Class Resource Manager feature in System Roles (Manage Features > Catalog Manager Features).

Create a Class Resource Attribute

To create a class resource attribute

1. Go to **Manage Center > Learning > Class Resource Manager > Class Resource Attributes**.
2. Click **+ Create Class Resource Attribute**.
3. Configure the attribute details. For detailed information about the attribute fields, please see Class Resource Attribute Reference.
4. Configure the display areas settings. Select one or more check boxes to specify where the attribute is shown to administrators in the LMS.
    - **Class Resource Filter -** Enables you to filter the list of class resources by the attribute in the Class Resources page.
    - **Class Resource Column -** Adds a column to the Class Resource page so that you can see at-a-glance the attribute's value for each resource.
    - **Summary Overlays -** Accessed in the Resource Planner, Catalog Editor and Class Resource selector.
    - **Catalog Editor** - Recommended Class Resources

4. Click **Save**.

Edit a Class Resource Attribute

To edit a class resource attribute

1. Go to **Manage Center > Learning > Class Resource Manager > Class Resource Attributes**.
2. Locate the appropriate class resource attribute.

3. Click the action menu and select **Edit**.
4. Make the necessary edits.
5. Click **Save**.

Delete a Class Resource Attribute

To delete a class resource attribute

1. Go to **Manage Center > Learning > Class Resource Manager > Class Resource Attributes**.
2. Locate the appropriate class resource attribute.
3. Click the action menu and select **Delete**.
4. Click **OK**.

Create and Manage Holiday Calendars

Holiday calendars are used to determine when training centers, instructors and class resources are unavailable due to holidays or other reasons. You can configure multiple holiday calendars, each with their own set of unavailable dates and linked training centers. For example, if your organization runs classroom training sessions in multiple countries, you may wish to configure a holiday calendar for each country.

Holidays are shown on the Resource Planner and Schedule tabs for facilities and class resources. You can still create an event on a holiday date but it causes a resource conflict, which is displayed on the calendar.

To configure holiday calendars, your user role must have unrestricted access to the Class Resource Manager feature in System Roles (Manage Features > Catalog Manager Features).

Create a Holiday Calendar

To create a holiday calendar

1. Go to **Manage Center > Learning > Class Resource Manager > Holiday Calendars**.
2. Click **+ Create Holiday Calendar**.
3. The calendar is created with a default calendar name. To rename the calendar, click the **[Edit]** link.
4. Add one or more holidays to the calendar.
   a. Click **+ Add Holiday.**
   b. Enter a descriptive name for the holiday (for example, Spring Bank Holiday).
   c. Select the date of the holiday.
   d. Click **Save**.
   e. Repeat the above steps to add more holidays.
5. Click **Back** to return to the list of holiday calendars.

Link a Training Center with a Holiday Calendar

You can link one or more training centers to a holiday calendar. This allows course administrators to plan scheduled events for training centers and their resources around the holiday schedule.

To link a training center

1. Go to **Manage Center > Learning > Class Resource Manager > Holiday Calendars**.

2. Locate the appropriate holiday calendar.
3. Click the action menu and select Edit.
4. Click the **Training Centers** tab.
5. Click **Link Training Center**.
6. Select the training centers to link to the holiday calendar.
7. Click **Save**. The training centers are added to the list in the Training Center tab.

To remove a link to a training center, select Unlink.

Edit a Holiday Calendar

1. Go to **Manage Center > Learning > Class Resource Manager > Holiday Calendars**.
2. Locate the appropriate holiday calendar.
3. Click the action menu and select **Edit**.
4. Edit the details as necessary.
5. Click Save.

Delete a Holiday Calendar

1. Go to **Manage Center > Learning > Class Resource Manager > Holiday Calendars**.
2. Locate the appropriate holiday calendar.
3. Click the action menu and select **Delete**.
4. Click **OK**.

Create and Manage Facilities

Facilities represent rooms located at a training center. Within a facility, you can specify the location, the seating arrangements and audio and video equipment available for that room. You can associate one or more facilities with a training center. When that training center is selected for a classroom-based class schedule, associated facilities can be booked for the class. Or, it can be selected for a simple booking reservation.

You can base the limit for the maximum number of enrollments in a physical class on the capacity of the training facility hosting it. For detailed information, please see Enrollment Limits Based on Facility.

To manage facilities, your user role must have unrestricted access to the Class Resource Manager feature in System Roles (Manage Features > Catalog Manager Features).

Create a Facility

To create a facility

1. Go to **Manage Center > Learning > Class Resource Manager > Facilities**.
2. Click **+ Create Facility**.
3. Configure the fields as appropriate. For additional information about the available fields, please see Facilities Field Reference.
4. Select and enter the information about Room Equipment.
5. Click **Save**.

Schedule Events for a Facility

You can schedule events for facilities to book them for a specific date. From here, you can also create a new module session, booking the facility at the same time.

To create an event

1. Go to **Manage Center > Learning > Class Resource Manager > Facilities**.
2. Locate and open the appropriate facility.
3. Click on the **Schedule** tab.
4. Click **+ Create Event**.
5. Configure the event. For additional information about configuring and managing events, please see Create and Manage Events.

Edit a Facility

You can edit any class schedules that have booked the facility or open the corresponding learning module session in the Catalog Editor. You can also create a new scheduled event to book the facility. The new event can be linked to a session's class schedule or you can book the facility by itself.

To edit a facility

1. Go to **Manage Center > Learning > Class Resource Manager > Facilities**.
2. Locate the appropriate facility.
3. Click the action menu and select **Edit Details**.
4. Edit the facility details as necessary.
5. Click **OK**.

Delete a Facility

To delete a facility

1. Go to **Manage Center > Learning > Class Resource Manager > Facilities**.
2. Locate the appropriate facility.
3. Click the action menu and select **Delete**.
4. Click OK.

Create and Manage Instructors

Instructors are the LMS users who are qualified to teach specific learning modules. Catalog administrators can create instructors and assign them to the learning modules they are qualified to teach.

You can also auto-populate the instructor list with LMS users who are currently assigned as instructors for classroom sessions.

Selecting an LMS user to be an instructor does not automatically enable them to access these functions. They must have a primary or additional role that grants access to them. **Note**: The LMS comes with an Instructor role out of the box, which enables access to the functions relating to classroom based training. These include:

- Reviewing session participants
- Maintaining attendance sheets
- Sharing files in the Knowledge Center
- Enrolling learners in sessions

> To manage instructors, your user role must have unrestricted access to the *Class Resource Manager* feature in System Roles (Manage Features > Catalog Manager Features).

Create an Instructor

Catalog administrators can create instructors and assign to them a learning module they are qualified to teach. After the new instructor has been created, course administrators can assign additional learning modules to them, and schedule events for them, such as a new classroom session.

To create an instructor

1. Go to **Manage Center > Learning > Class Resource Manager > Instructors**.
2. Click **+ Create Instructor**.
3. In the **Instructor** field, click the **Browse** button to search for and select an instructor.
4. In the **Course** field, click the **Browse** button to search for and select the course(s) the instructor is qualified to teach.
5. Click **Create**.

Schedule Events for an Instructor

You can schedule events for instructors to book them for a specific date. From here, you can also create a new module session, booking the instructor at the same time.

To create an event

1. Go to **Manage Center > Learning > Class Resource Manager > Instructors**.
2. Locate and open the appropriate instructor.
3. Click on the **Schedule** tab.
4. Click **+ Create Event**.
5. Configure the event. For additional information about configuring and managing events, please see Create and Manage Events.

Auto-Populate Instructors

The list of instructors can be auto-populated based on current instructor assignments for all classroom training sessions.

To auto-populate instructors

1. Go to **Manage Center > Learning > Class Resource Manager > Instructors**.
2. Click **Auto-Populate**.
3. Click **Auto-Populate**. The LMS searches through all current course instructor assignments to populate the qualified course list for each instructor. The dialog updates to show the number of instructor qualifications that were added.
4. Click **OK**.

Edit an Instructor's Qualified Courses

You can edit the list of courses an instructor is qualified to teach. This helps course administrators manage assign appropriate instructors to classroom sessions.

> If you remove all qualified courses for an instructor, that user will be removed from the instructor list.

To edit an instructor's qualified courses

1. Go to **Manage Center > Learning > Class Resource Manager > Instructors**.
2. Locate the appropriate instructor.
3. Click the action menu and select **Edit Qualified Courses**. Take one of the following actions.:
   - To add a qualified course for the instructor, click **+ Add Qualified Course**.
   - To delete a course from the list, select **Delete** from its action menu. After confirming the deletion the course is removed from the list.

Create and Manage Training Centers

Training centers represent a physical location with associated collections of facilities, rooms and class resources. Training centers can be assigned to classroom-based class schedules, enabling users to book its available facilities and resources.

Holiday calendars can be associated with a training center to help determine the training center's availability when booking. Please see Holiday Calendars for additional information.

You also have the ability to associate a map with the training center. Learners can download this map in the LMS, from the Course Details, for example.

To manage training centers, your user role must have unrestricted access to the *Class Resource Manager* feature in System Roles (Manage Features > Catalog Manager Features).

Create a Training Center

To create a training center

1. Go to **Manage Center > Learning > Class Resources Manager > Training Centers**.
2. Click **+ Create Training Center**.
3. Enter the training center's name. This field is mandatory.
4. Enter the remaining properties. **Note**: With the exception of the map, these fields are not shown to learners.
5. To provide learners with a map of the training center, click the browse icon. Navigate to the map file and click **Select** to select the map.
6. Click **Save**.

Set Training Center Permissions

To set a training center's permissions

1. Go to **Manage Center > Learning > Class Resources Manager > Training Centers**.
2. Locate the appropriate training center.
3. Click on the action menu and select **Permissions**.
4. Configure the permissions as appropriate and click **OK**.
5. Click **Save**.

Edit a Training Center

To edit a training center

1. Go to **Manage Center > Learning > Class Resources Manager > Training Centers**.
2. Locate the appropriate training center.
3. Click on the action menu and select **Edit**.
4. Edit the details as appropriate.
5. Click **Save**.

Delete a Training Center

To delete a training center

1. Go to **Manage Center > Learning > Class Resources Manager > Training Centers**.
2. Locate the appropriate training center.
3. Click on the action menu and select **Delete**.
4. Click **Delete**.

Create and Manage Events

You can schedule events for class resources, facilities and instructors to book them for a specific date. When events are scheduled for one of these entities, they are displayed as blocks on the Resource Planner.

From here, you can also create a new module session, booking the resource at the same time.

> To manage events, your user role must have unrestricted access to the *Class Resource Manager* feature (Manage Features > Catalog Manager Features).

Create an Event

Events can be created from within each entity (class resource, facility or instructor) or from the Resource Planner.

To create an event from the Class Resources editor:

1. Go to **Manage Center > Learning > Class Resource Manager > Class Resources**.
2. Locate and open the appropriate class resource.
3. Click on the **Schedule** tab.
4. Click **+ Create Event**.
5. Follow the steps as detailed in the **Configure the Event** section of this topic.

To create an event from the Facilities editor:

1. Go to **Manage Center > Learning > Class Resource Manager > Facilities**.
2. Locate and open the appropriate facility.
3. Click on the **Schedule** tab.
4. Click **+ Create Event**.
5. Follow the steps as detailed in the **Configure the Event** section of this topic.

To create an event from the Instructors editor:

1. Go to **Manage Center > Learning > Class Resource Manager > Instructors**.
2. Locate and open the appropriate instructor.
3. Click on the **Schedule** tab.
4. Click **+ Create Event**.
5. Follow the steps as detailed in the **Configure the Event** section of this topic.

To create an event from the Resource Planner

1. Go to **Manage Center > Learning > Class Resource Manager > Resource Planner**.

2. After you have selected the resource planner options or preset, click **+ Create Event**.
3. Select the event type.
4. Follow the steps as detailed in the **Configure the Event** section of this topic.

Configure the Event

After creating the event, you can begin to configure it by selecting the event type.

To configure the event

1. In the Create Event dialog, select the type of event to create; a module classroom session or a class resource, facility or instructor booking.
2. Click **Continue**.
3. Enter the event details. A wizard steps you through the configuration fields. Information required varies based on the event type.
4. If the facility, instructors and resources required for your event are available, click **Continue**. Otherwise, click **Back** to select alternative resources or dates.

> For module session events select any save options as appropriate. For example, 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.

5. Click **Book**. The dialog shows a summary of the event booking.
6. Click **Close**. The new event is added to the schedule for the resource.

Event Editing

When editing a session's event details, you can mark the changes as draft and then review all your changes before saving or rejecting them. An event with draft changes to be reviewed has a dashed left border on the calendar instead of a solid one.

> All subsequent edits to an event marked as draft are also draft. Event changes that you mark as draft are discarded if you log out before they are reviewed and saved.

Events can be edited by accessing the associated class resource, facility or instructor. Alternatively, some events can be edited from the Resource Planner using a drag-and-drop method. To edit event chips in the Resource Planner, you must have a system role with unrestricted access to the *Resource Planner* feature in System Roles (Manage Features > Catalog Manager Features).

To reschedule events in the Week view or Month view

1. Drag event chips to another day at the same time slot. The Edit Event dialog opens.

2. Click **Book** to confirm the change of schedule.
3. If the event is a module session, select the **Mark change as draft** check box, if it needs to be reviewed.
4. Click **Close** to close the Edit Event dialog. The event is moved to the new day.

To edit an event start time in the Day view

1. Drag the event to change its start time. The Edit Event dialog opens.
2. Click **Book** to confirm the change of start time.
3. If the event is a module session, select the **Mark change as draft** check box, if it needs to be reviewed.
4. Click **Close** to close the Edit Event dialog. The event is moved to the new time slot.

To edit the duration of an event in the Day view

1. Resize the event block to increase or decrease its duration. The Edit Event dialog opens.
2. Click **Book** to confirm the change of duration.
3. If the event is a module session, select the **Mark change as draft** check box, if it needs to be reviewed.
4. Click **Close** to close the Edit Event dialog. The event is updated to the new duration.

Review and Accept Draft Event Changes

Administrators can review draft edits for events from the facility, instructor or resource Schedule tab, or from the Resource Planner. When a scheduled event has draft edits, it is shown with a dashed left border in the calendar, and there are two buttons on the Schedule tab and Resource Planner: *Review Changes* and *Reset Changes*.

You can also review a module session event by opening it in the Catalog Editor and saving the session.

To review draft event changes from the Schedule tab

1. Go to one of the following pages:
    - **Manage Center > Learning > Class Resource Manager > Class Resources**
    - **Manage Center > Learning > Class Resource Manager > Facilities**
    - **Manage Center > Learning > Class Resource Manager > Instructors**
2. Click the name of the resource, facility or instructor you want to review the draft event changes for and then click **Schedule**. Alternatively, select **View Schedule** from its action menu. The Schedule tab opens.
3. To locate the event on the calendar you can select a date from the calendar drop-down, or click **Today**, or click the chevrons either side of the date range above the calendar.

4. Click **Review Changes**. The Review Changes dialog opens, where you can check the event details.
5. To accept and save the changes, click **Save All Changes**. The dialog shows the event summary information and the session associated with the event is saved.
6. To discard the draft event changes, click **Close** to close the Review Changes dialog, and on the Schedule tab click **Reset Changes**. You are asked to confirm this action.

To review all draft events at once for a specific date range and optional combination of resources, facilities and instructors

1. Go to **Manage Center > Learning > Resource Planner**.
2. To locate one or more events on the calendar you can select a date from the calendar drop-down, or click **Today**, or click the chevrons either side of the date range above the calendar.
3. Complete steps 4 to 6, above.

The Resource Planner

The Resource Planner displays the event schedules of facilities, instructors and resources. It helps you to plan and create resource bookings for classroom training sessions. Event bookings are displayed on a grid, with a column for each date and a row for each resource. You can view the schedule on a daily, weekly or monthly basis.

To view the resource planner and create scheduled events, your user role must have unrestricted access to the *Class Resource Manager* feature (Manage Features > Catalog Manager Features).

Selecting the Resources to Display in the Resource Planner

1. Go to **Manage Center > Learning > Class Resource Manager > Resource Planner**. If the Resource Planner has a default preset, it will automatically be selected when you open the planner. If this is not the case, the Resources selection window displays and you can take one of the following actions.

    - Select Resources Individually:

        a. To search for a facility start typing its name in the text box and then select it from the auto-complete suggestions. Alternatively, click the **browse** icon to open the Facility Selector, where you can select one or more facilities.

        b. Repeat the above step for instructors and class resources, as required.

        c. Click **Apply**.

    - Select a Resource preset:

        a. Click **Resource Presets**. The Resource Presets dialog opens, listing the saved presets.

        b. To load a preset, select **Load** and then click **OK** on the Confirmation dialog.

2. If necessary, take one of the following additional actions.

    - To add more facilities, instructors or resources to the planner, use the selection control at the top-left of the planner.
    - To remove a facility, instructor or class resource from the planner, click **Remove**.
    - To pin a facility, instructor or class resource to the top of the list in the planner, click **Pin to Top**.
    - To edit a facility or class resource, click its name in the list in the planner.

Edit a Resource Preset

You can edit a resource preset to change its name or select it as the default set of facilities, instructors and class resources to display in the Resource Planner. **Note**: You cannot update the facilities, instructors or class resources in a preset. You will need to create a new preset.

To edit a resource preset

1. Go to **Manage Center > Learning > Class Resource Manager > Resource Planner**.
2. Select **Resource Presets**. The Resource Presets dialog opens, listing the saved presets.
3. Select **Edit** for the preset you want to edit. The Edit Preset Filter dialog opens and lists the facilities, instructors and class resources selected for the preset.
4. Edit the preset name as required. If you select the **Set as default** check box, the preset's facilities, instructors and resources are automatically displayed in the Resource Planner when you open it.
5. Click **Save**.
6. To delete a preset, select **Delete** from its action menu.
7. Click **Done**.

Create an Event in the Resource Planner

You can book personal events, facility events and resource events in the Resource Planner. From here, you can also create a new module session.

To create an event from the Resource Planner

1. Go to **Manage Center > Learning > Class Resource Manager > Resource Planner**.
2. Click +Create Event.
3. Select the event type you would like to create.
4. Configure the event as needed. For detailed information about configuring events, please see Create and Manage Events.

The Class Resources Calendar

The **Class Resources Calendar** shows the scheduled bookings for selected facilities, instructors and class resources in a calendar format. Booking events for facilities and class resources can be created and edited in the calendar.

Catalog administrators can create and edit booking events for facilities and class resources in the calendar.

> To use the Class Resources Calendar your user role must have unrestricted access to the *Class Resource Manager* feature in System Roles (Manage Features > Catalog Manager Features).

Select Resource Bookings to Display on the Calendar

You can select facilities, instructors and class resources to be displayed on the calendar.

1. Go to **Manage Center > Learning > Class Resource Manager > Class Resources Calendar**.
2. To search for a facility start typing its name in the text box and then select it from the auto-complete suggestions. Alternatively, click the browse icon to open the Facility Selector, where you can select one or more facilities.
3. Repeat this step for instructors and class resources, as required.
4. Click **Search** to view the scheduled bookings for the selected facilities, instructors and class resources.
5. Move the pointer over a booking for more information about it.

Book a Facility from the Class Resources Calendar

You can book a facility from the Class Resource Calendar to reserve it for a future event. For example, you might want to book a facility for a classroom-based course that has not yet been configured in the LMS.

When you book a facility, a scheduled event is created. The event is shown in both the Class Resources Calendar and the Resource Planner. It is also shown on the Schedule tab for the specific facility.

> Before you attempt to book a facility, it is a good idea to display the facility on the calendar in case there are conflicts.

To book a facility from the Class Resource Manager

1. Go to **Manage Center > Learning > Class Resource Manager > Class Resources Calendar**.
2. Click **+ Book Facility**.
3. Enter or select the **Facility Name** you want to book.
4. Complete the **Booker**, **Title**, **Start Time** and **End Time** fields.
5. Optionally, add a comment about the booking.
6. Click **Book It**.

Book a Class Resource from the Class Resources Calendar

You can book a class resource from the Class Resource Calendar to reserve it for a future event. For example, you might want to book a class resource for a classroom-based course that has not yet been configured in the LMS.

When you book a class resource, a scheduled event is created. The event is shown in both the Class Resources Calendar and the Resource Planner. It is also shown on the Schedule tab for the specific class resource.

> Before you attempt to book a resource, it is a good idea to display the resource on the calendar in case there are conflicts.

To book a facility from the Class Resource Manager

1. Go to **Manage Center > Learning > Class Resource Manager > Class Resources Calendar**.
2. Click **+ Book Resource**.
3. Enter or select the **Resource Name** you want to book.
4. You must also complete the Quantity, **Title**, **Booker**, **Start Time** and **End Time** fields.
5. Optionally, add a comment about the booking.
6. Click **Submit**.

Import Course Content

PeopleFluent learning gives organizations the ability to add and revise course content using import functions.

> The topics in this section focus on importing course content packages. For information about importing course learning modules, sessions and programs, please see Import Courses via the Data Loader or Import Learning Programs via the Data Loader.

Course Content Import

Content packages can be imported individually or by bundling multiple packages into a ZIP file and importing them in bulk. Upon successful import, you have the option to refine the course setup by configuring it as a learning module through either the Catalog Editor or the Course CSV Data Loader.

Import Content Packages

Course Content Revisions

To ensure learning modules are up-to-date when elements of the course change, you can import course revisions. The new revised learning modules are recorded in the LMS in addition to the previous versions, so the LMS can hold many different revisions of a particular course. Only one revision is presented to learners in the course catalog, though, and that is usually the latest, subject to approval.

Import Course Content Revisions

Course Import and Migration via Rustici Engine

Rustici Engine is a separately licensable component that provides improved SCORM compliance and integrates with the Analytics dashboards (also separately licensed) in the SaaS PeopleFluent Learning platform. Rustici Engine integration enables LMS users to take advantage of third-party content connectors, such as G01.

Migration of courses to Rustici Engine applies only to SCORM, AICC, and xAPI courses imported via Import Content Package. Online modules that launch exams, launch a file from the repository, or launch a web address cannot be migrated to Rustici Engine. Additionally, Rustici Engine cannot be selected as the launch interface for AICC courses imported via the Import AICC Course Structure feature. The launch interface for these courses is set to Structured Content and cannot be changed.

Import or Migrate a Course to Rustici Engine

Proxied Launch Packages

Course administrators can generate an AICC course package from a learning module, so that it can be imported into another AICC-conformant learning management system. This enables the course to be launched from the other system while the learner's progress information is recorded in PeopleFluent Learning, and is also communicated to the system from which the course was launched.

Proxied Launch Packages

Import Content Packages

You can import individual courses on an ad hoc basis, or bulk import multiple courses at once. When you import courses into the LMS you can record and track enrollments, learner progress, assessment scores and other administrative data according to each course's data model and communications standards.

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

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

- SCORM
- xAPI (also known as Experience API or Tin Can API)
- CMI5 (only available when importing to Rustici Engine)
- AICC

You will need to know which standard your courses use.

> Before you import and configure courseware it is good practice to set up and configure the catalogs that you want to assign courses to when you import them.

Import a Single Content Package

To import a single content package

1. Go to **Manage Center > Learning > Import > Import content package**.
2. Click **Choose File** to select the content package to import, and then click **Next**.
3. Enter a new Module ID if required.

   For SCORM compliant packages, the Module ID that the LMS will use to identify the course defaults to the <manifest> element's identifier attribute in the manifest file (used to identify SCORM packages). You can change the Module ID to fit your organization's naming conventions. Module IDs cannot contain spaces.
4. To assign the imported course to one or more catalogs, select the **Update catalog setting** check box, and then click the **Assign catalog** link to select the catalog(s).
5. To show the course to learners when they search or browse catalogs, select the **Show in catalog** check box.

6. To track learner activity for the course with Rustici Engine, select the **Use Rustici Engine** check box, if available. Otherwise the native LMS SCORM engine is used.
7. Click **Import as New Bundle**.
8. Select the course language from the drop-down list.
9. Enter a Module Title to override the default.
10. Click **Next**. The Module Created page summarizes the course information you entered on the previous pages.
11. To configure the course as a learning module in the Catalog Editor, click **Open Catalog Editor**. To import another content package, click **Import New Content Package**.

Import Multiple Content Packages

> As each courseware package is itself a ZIP file containing the files comprising the course, you are packaging multiple ZIP files into a single ZIP file. You cannot upload new versions of existing courses by combining them into a single ZIP file. The batch upload process will fail.

To import multiple content packages at once

1. Create a single ZIP file containing your courseware packages.
2. Go to **Manage Center > Learning > Import > Import content package**. The Import Content Package page opens.
3. Click **Choose File** to select the content package to import, and then click **Next**. The course packages present in the ZIP file are summarized in the Batch Update Options page. The courses' Title values are copied from the <manifest> element's **identifier** attribute in each package's manifest file.
4. To import the course packages, leave the **Import courses** option selected.
5. Select an option to specify how the LMS selects IDs for the courses in the package:
   - Select **Use IDs specified in the course descriptions** to set the learning module IDs to the Title (manifest identifier) of the corresponding course content package.
   - Select **Use the base file names of the source files** to set the imported courses learning module IDs to the file names of the content packages in the ZIP file. The course content package file names cannot contain spaces.
6. Select an option to specify how the LMS selects IDs for the courses in the package:
7. Optionally, enter a prefix for the learning module IDs created from the imported content packages.

8. Click **Next**.
9. Select the language for the course modules from the drop-down list. If you are importing a package containing more than one course, you select the primary language from the drop-down list.
10. To assign the imported courses to one or more catalogs, select the **Update catalog setting** check box, and then click the **Assign catalog** link to select the catalog(s).
11. To show the courses to learners when they search or browse catalogs, select the **Show in catalog** check box.
12. Click **Read Access** and **Write Access** to set the access permissions on the imported learning modules.
13. Click **Import**. When the import process has completed, the Batch Import Summary page lists the courses and their import status.

> When importing multiple SCORM, AICC or xAPI courses into Rustici Engine via the Import Content Package feature, a course may be successfully imported even if there are minor issues parsing the imsmanifest file. For example, if files are listed in the manifest but do not exist in the package, the course will import and launch but will also generate a warning. The warnings will be displayed for each applicable course on the import results page.

Import AICC Course Structures

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

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

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

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

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

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

To import an AICC course

1. Go to **Manage Center > Learning > Import > Import AICC course structure**.
2. Choose each AICC file and then select the appropriate character encoding from the Encoding drop-down list.

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

3. Click **Next**.
4. To assign the imported course to one or more catalogs, select the **Update catalog setting** check box, and then click the **Assign catalog** link to select the catalog(s).
5. To show the course to learners when they search or browse catalogs, select the **Show in catalog** check box.
6. Click **Import as New Bundle**.
7. Select the course language from the drop-down list.
8. Enter a Module Title to override the default.
9. Click **Next** to complete the import process.

Batch Import Summary

The Batch Import Summary page lists the results of importing multiple content packages.

- In the Course column, each entry displays the module title for every course, extracted from the <title> element of the first <organization> element within the manifest file, along with its distinct manifest identifier.
- In the Status column, you'll find the indication of whether each course was successfully imported or not, along with the module ID. This ID is determined either by the manifest identifier or the content package file name, depending on the chosen option for module ID generation during import (utilizing IDs specified in course descriptions or basing them on the source file names).

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

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

Delete Learning Modules Matching Content Packages

You can use the "Import content package" feature to remove LMS learning modules with Module IDs corresponding to the Title (i.e., manifest identifier) within the selected course content packages. You have the option to delete a single learning module by selecting a content package containing a singular course, or delete multiple learning modules by choosing a ZIP file containing multiple content packages.

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

To delete learning modules using the Import content package feature

1. Create a single ZIP file containing the content packages you want to delete from the LMS as learning modules.
2. Go to **Manage Center > Learning > Import > Import content package**.
3. Click **Choose File** to select the content package, and then click **Next**. The course packages present in the ZIP file are summarized in the Batch Update Options page. The courses' Title values are copied from the <manifest> element's **identifier** attribute in each package's manifest file.
4. Select the **Delete existing modules** option.
5. Select **Use IDs specified in the course descriptions**.
6. If you the courses you want to delete were previously imported with a prefix, you will need to enter the prefix to identify them for deletion.
7. Click **Next**.
8. Click **Delete**. The Batch Delete Summary page lists the courses in the imported content package and the deletion status of any corresponding learning modules in the LMS.

Content Packages with Non-English File Names

File names that contain non-English letters or digits in a content package must be encoded using the UTF-8 character encoding, otherwise the LMS cannot import them.

Import Course Content Revisions

Course administrators can import course revisions from the Catalog Editor, or via the Import Content Package wizard.

> If course content has changed significantly, consider creating a new course instead of replacing it with a newer revision.

About Course Revisions

You can import course revisions in the Catalog Editor for the following learning types:

- Exam
- Online
- On-the-Job Training
- Task
- Virtual Classroom (Archived)

You can select the following types of content to import:

- Content package (for example, SCORM or AICC)
- AICC course structure
- Resource

Each time you import a course revision it is stacked in the list of revisions from bottom to top, so the latest revision appears nearer the top. However, the order of revisions can change when you approve a revision or make it effective. The Effective revision is ranked at the top, followed by Approved revisions, followed by Preview revisions.

As a course administrator you can mark a Preview revision as Approved. Approved revisions are not publicly available to learners, but course administrators can enroll learners in Approved revisions using Group Enroll. For more information, see Approved Revisions, below.

There can be only one Effective revision. Likewise there can be only one Approved revision at a time. Implicitly, you can rank Effective revision as the highest state followed by Approved revision then Preview revision. Marking or importing an Effective revision can nullify the states of any previous Effective revision, Approved revision and/or Preview revision(s), so Approved or Preview revisions can only appear in the list ranked lower than an Effective revision but not higher.

The same logic can apply to Approved revisions. Marking as Approved can nullify the states of any previous Approved revision and/or Preview revision(s), so Preview revisions can only appear in the list ranked lower than an Approved revision but not higher.

Importing Revisions for Modules Associated with Programs

If you select *Also re-enroll learners in completed programs for which this module is mandatory*, the LMS finds all learners who have completed a previous revision of course. If the completion is linked to a program, the LMS finds the immediate active program containing the revised module to run session enrollment update, or it finds the topmost level completed program to run re-enrollment.

If a learner has completed two different programs which both contain the revised module, two re-enrollments are done. Therefore with this option, any learner who completed the revised module before can take the latest revision and preserve the program-module relationship.

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

The option *All enrolled learners, including those who have already completed the course* is provided only when it is enabled in System Configuration. To enable this option, go to **Manage Center > System > System Configuration** and select the check box labelled *Allow administrators to publish new revisions to learners whose status in earlier revisions is Completed*.

Approved Revisions

This intermediate revision state enables organizations to push learners to get a head start with enrolling into the most up-to-date content, even though this update has not been marked as effective yet in fulfilling other requirements. This feature is aimed at highly productive environments where employees have to get a head start on the latest training materials before the training is officially released. For courses that don't require this much complexity in rolling out training materials, simply stick to importing the content as the effective revision.

Only course administrators can enroll learners into an approved revision from Catalog Editor > Group Enroll. Although this revision type is not publicly available to learners, transcript details about this revision is available in Current Learning ModulesCurrent Courses, Records/ Transcripts or other areas. Learners cannot self-enroll or be assigned with a course on approved revision, an administrator has to manually group enroll learners.

When you approve a revision learners are automatically re-enrolled under the following conditions:

- A revision is marked as Approved and learners have not yet completed an earlier Approved revision.
  This acts as an auto carry-forward before the newest Approved revision nullifies any previous Approved revision.
- A learner completed a revision and there is an Approved revision to be taken.
  This is the auto get ahead logic for those who have previously completed the module.
- A learner who will complete any revision and there is an Approved revision to be taken.
  This is the auto get ahead logic for those who will complete an earlier revision.

> When an Approved revision is marked as Effective, learners who have already completed the Approved (now Effective) revision are not re-enrolled.

Import Module Revisions in the Catalog Editor

To import a course revision in the Catalog Editor

1. Go to **Manage Center > Learning > Learning Modules** and select the module to update.
2. Click **Revisions and Launch Preview** in the Module Properties tab.
3. Select the type of import from the +Import New Revision drop-down list. Each type of import requires different parameters.
4. In the Confirm New Module Revision page select who to make the new revision available to. The default options for new module revisions are to make it available to learners who have not yet been enrolled and to learners who have been enrolled but have not yet started it.
5. Click **Publish**. A message is displayed confirming the course revision has been created.
6. To Preview the new course revision, click **Preview**.

Import Module Revisions in the Import Content Package Wizard

To import a content package course revision with the Import Content Package wizard

1. Go to **Manage Center > Learning > Import > Import content package**.
2. In the Select a Package page, click **Choose File** to select the content package to import, and then click **Next**.

3. To update an existing course, enter its Module ID. This might be the default value imported from the manifest file, or it might be an ID specified by your organization. The LMS automatically detects whether a Module ID matches an existing course.
4. To assign the imported course revision to one or more catalogs, select the **Update catalog setting** check box, and then click the **Assign catalog** link to select the catalog(s).
5. To remove the course from its assigned catalog(s), click the **Remove assigned catalog(s)** link.
6. To show the course to learners when they search or browse catalogs, check the **Show in catalog** check box. If you leave this check box cleared, the course will not be shown to learners.
7. When you import course packages you select the language of the course you are creating or updating:
   - If you are updating an existing course and the new version is the same language, click **Update Existing Bundle Revision**.
   - If you are updating an existing course with a new version in a different language, click **Import As New Bundle**.
8. Select the language of the course you are updating from the Language drop-down list.
9. Change the module title, if required, and click **Next**.
10. In the Confirm New Module Revision page select who to make the new revision available to. The default options for new module revisions are to make it available to learners who have not yet been enrolled and to learners who have been enrolled but have not yet started it.
11. You can preview revisions to test them before making them available to learners. To import a revision for previewing, select **For previewing purposes only**.
12. Click **Publish**. A message is displayed confirming the course revision has been created.

Approve Module Revisions

You can approve a revision marked as Preview to enable learners to be enrolled in it before it is officially released.

To approve a Preview revision

1. Go to **Manage Center > Learning > Learning Modules** and select the module to update. The Catalog Editor opens at the Define Module Properties page.
2. Click **Revisions and Launch Preview** in the Module Properties tab. The Revisions and Launch Preview page lists the revisions for the module.

3. Select **Mark as Approved** from the revisions action menu.
4. Click OK.

Make a Preview Revision Available to Learners

If you have imported a module revision for preview only, a Preview link is added to the Module Properties tab in the Catalog Editor. Only course administrators (with permission to view the module) can view the preview.

To make a Preview revision available to learners

1. Go to **Manage Center > Learning > Learning Modules** and select the module to update.
2. Click **Revisions and Launch Preview** in the Module Properties tab.
3. Select **Mark as Effective** from the revision's action menu.
4. Select who the new revision will be available to.

Import or Migrate a Course to Rustici Engine

Rustici Engine is a separately licensable component that provides improved SCORM compliance and integrates with the Analytics dashboards (also separately licensed) in the SaaS PeopleFluent Learning platform. Rustici Engine integration enables LMS users to take advantage of third-party content connectors, such as G01.

Migration of courses to Rustici Engine applies only to SCORM, AICC, and xAPI courses imported via Import Content Package. Online modules that launch exams, launch a file from the repository, or launch a web address cannot be migrated to Rustici Engine. Additionally, Rustici Engine cannot be selected as the launch interface for AICC courses imported via the Import AICC Course Structure feature. The launch interface for these courses is set to Structured Content and cannot be changed.

It is not possible to migrate courses from Rustici Engine back to the native LMS SCORM engine.

If Rustici Engine is enabled for your LMS implementation, course administrators can:

- Import new course content packages (including CMI5-based courses) into Rustici Engine
- Migrate existing courses to use the Rustici Engine launch interface.
- Migrate course revisions to the Rustici Engine for courses originally loaded to the original native LMS SCORM engine.
- Preview courses that have changed their launch interface to Rustici Engine.

If Rustici Engine is enabled for your LMS implementation, you can:

- Import new course content packages (including CMI5-based courses) into Rustici Engine
- Migrate existing courses to use the Rustici Engine launch interface.
- Migrate course revisions to the Rustici Engine for courses originally loaded to the original native LMS SCORM engine.
- Preview courses that have changed their launch interface to Rustici Engine.

For more information about the benefits of using Rustici Engine, and each standard, see the Rustici Software website.

> Learners who are *In Process* on a revision will not have their registration state transferred to Rustici Engine. This means all *In Process* users will have to start over. Administrators may need to communicate this information or decide when or if to migrate the course.

To load a new revision into Rustici Engine, you must first load the revision into the native player and then change its launch interface in the Catalog Editor or Course CSV Loader. The *Rustici Engine* option is available only when Rustici Engine is configured in the *ekp.properties* file. Similarly, if Rustici Engine is not configured, changing the Launch.Interface to *14* (Rustici Engine) via the Course CSV Loader causes the import to fail.

Once a course revision has been migrated to Rustici Engine, subsequent revisions are automatically loaded to Rustici Engine, so there is no need to update the launch interface for each revision. After migrating a course to Rustici Engine, administrators can preview the course from the Catalog Editor's Preview page. The migration happens the first time a user launches the course, either as a Preview through the Catalog Editor or when an enrolled learner launches the course.

To migrate the latest revision of an existing course to Rustici Engine in the Catalog Editor

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to migrate to Rustici Engine. The Catalog Editor opens at the Define Module Properties page.
2. Click **Define Launch Properties** in the Module Properties tab. The Web Launch Interface Specifications page opens.
3. Select **Rustici Engine** from the Launch interface drop-down list in the Web Launch Interface Specifications page.
4. Click the **Save** icon to save your changes.

To migrate a course to Rustici Engine using the Course CSV Loader

- Set the Launch.Interface value to *14*.

Importing CMI5 Courses to Rustici Engine

You can import xAPI (or TinCan) based courses that use the CMI5 specification as content packages via the Course CSV Data Loader or the Import Content Package page in the LMS application. The import mechanism for CMI5 content packages differs slightly from xAPI/TinCan packages to accommodate the cmi5.xml manifest file name. For more information about the CMI5 xAPI specification, see https://xapi.com/cmi5/.

Error Message Translation

Rustici Engine exceptions raised by the LMS during launch, preview, or import of Rustici Engine courses are translated to the user's preferred language, based on their profile settings.

The following error messages are translated for import errors:

- Failed to create Learning Module [CourseId] for Rustici Engine
- Error in importing course to Rustici Engine [CourseId]

The following error messages are translated for launch or preview errors:

- Failed to acquire Engine config properties; these are necessary to work with Engine content. [engineCourseId, transcriptId]
- Unhandled Exception upon Launch of Engine course [engineCourseId, transcriptId]

Proxied Launch Packages

Course administrators can generate an AICC course package from a learning module, so that it can be imported into another AICC-conformant learning management system. This enables the course to be launched from the other system while the learner's progress information is recorded in PeopleFluent Learning, and is also communicated to the system from which the course was launched.

It is not necessary for the course to support AICC communication directly—it could be a SCORM course or LMS exam, for example—AICC communication is simply the mechanism that relays progress tracking information to the launching LMS.

For more information about configuring trusted sites and associating user ID profiles and templates with them, see the System Administration Guide.

Generate a Proxied Launch Package

To generate a proxied launch package

1. Go to **Manage Center > System > System Configuration**.
2. Add the hostname or IP address of the learning system from which the course will be launched to the *Trusted sites for proxied course launches* setting, if it is not already present.
3. Go to **Manage Center > Learning > Learning Modules** , and click the name of the module you want to generate a proxied launch package for. The Catalog Editor opens at the Define Module Properties page.
4. Click **Proxied Launch Package** in the Module Properties tab. The Proxied Launch Package page opens.
5. Select the character encoding for the course content from the **Encoding** drop-down list.
6. Click **Generate package**. The AICC package file is downloaded to your PC as a ZIP file.

Bulk Generate a Proxied Launch Package

To bulk generate a proxied launch package

1. Go to **Manage Center > System > System Configuration**.
2. Add the hostname or IP address of the learning system from which the course will be launched to t Trusted sites for proxied course launches setting, if it is not already present.
3. **Go to Manage Center > Learning > Learning Modules**, select the check boxes next to the names of the modules you want to bulk generate a proxied launch package for.
4. From the drop-down menu, click **Generate Proxied Launch Package**.
5. The Proxied Launch Package modal window opens.

6. Click **Generate package**. If any module selected is not an Online type, an error message will be
   displayed instead of the modal. The AICC package file is downloaded to your PC as a ZIP file.

Payment Management

The LMS provides several options related to payment management.

Payment Plans

You can configure payment plans for online payment and associate them with your organizations. Learners who are members of an organization can pay for their course enrollments according to the properties of the payment plan assigned to them.

Create and Manage Payment Plans

View Course Payment History

Token Payments

Token payments provide an alternative mechanism for paying for course enrollments. When a course enrollment is paid for with tokens, you can choose whether the tokens are deducted from the learner's account or from the final enrollment approver's account. (For example, if the approver is the learner's direct appraiser, they can buy a course with tokens on behalf of the learner.) Alternatively, a one-time token payment can be can deducted from one or more organizations for specific courses or sessions, so the tokens are debited from the organization's token account instead of charging per individual learner enrollment. These one-off payments can be refunded, if needed.

In order to use Token Payments, the system must be configured to use them. For additional information, please the System Configuration guide.

Manage Token Payments

One-Off Token Payments

Optional Payment Items

Optional Payment Items are resources can buy along with a course that is configured for online payment. You might want to set up optional payment items for generic categories of resources that are available for multiple courses, such as participant packs or accommodation.

Create and Manage Optional Payment Items

Cost Accounting Categories

Cost accounting categories allow you to categorize additional costs associated with course sessions. These categories are then available for selection in the Cost Accounting Information page in a learning module's session properties.

Create and Manage Cost Accounting Categories

Create and Manage Payment Plans

You can configure payment plans for online payment and associate them with your organizations. Learners who are members of an organization can pay for their course enrollments according to the properties of the payment plan assigned to them.

> In order to use Payment Plans, the system must be configured for online payments. Please see the System Configuration guide for information about enabling online payments.

Payment plans can be created to specify different charging options for different groups of users, enabling organizations to charge different amounts for the same course to different target groups of learners. You can assign a payment plan to one or more organizations from the Organization Maintenance page.

Payment plans can specify:

- Allowances for online payment
- Usage-limited and date-limited discounts
- Provisions for pre-payments (either through the use of currency, coupons or tokens)
- Discount thresholds or expiration

> Online payments and at least one payment gateway must be configured in order to set up payment plans. Please see the System Configuration guide for information about enabling online payments.

Should my Organization use Payment Plans?

Use the information in the table below to evaluate if your organizations should use payment plans.

How are Course Enrollments Paid for?	Payment Plan Required?
Organizations prepay for their learners' enrollments	Yes
Organizations offer different course rates to their learners	Yes
Organizations offer discounts on enrollment costs	Yes
All courses are free to employees of the organization	No
All learners pay the same rate	No

Organizations pay the same rate for their learners' enrollments	No

To manage Payment Plans, your user role must have unrestricted access to the *Payment Plans and Optional Payment Items* feature in System Roles.

Create a Payment Plan

To create a payment plan

1. Go to **Manage Center > Learning > Payment Manager > Payment Plans**.
2. Click **+ Create Payment Plan**.
3. Enter the payment plan properties. For additional information about configuring these fields, please see Payment Plan Properties Reference.
4. Click **Save**.

Edit a Payment Plan

To edit a payment plan

1. Go to **Manage Center > Learning > Payment Manager > Payment Plans**.
2. Locate the appropriate payment plan and click the Edit link.
3. Make the updates as necessary.
4. Click **Save**.

Delete a Payment Plan

To delete a payment plan

1. Go to **Manage Center > Learning > Payment Manager > Payment Plans**.
2. Locate the appropriate payment plan and click the Edit link.
3. Click the Delete button
4. Click **OK**.

Manage Token Payments

Token payments provide an alternative mechanism for paying for course enrollments. When a course enrollment is paid for with tokens, you can choose whether the tokens are deducted from the learner's account or from the final enrollment approver's account. (For example, if the approver is the learner's direct appraiser, they can buy a course with tokens on behalf of the learner.)

Alternatively, a one-time token payment can be can deducted from one or more organizations for specific courses or sessions, so the tokens are debited from the organization's token account instead of charging per individual learner enrollment. These one-off payments can be refunded, if needed. For additional information, please see One-Off Token Payments.

In order to use Token Payments, the system must be configured to use them. Please the System Configuration guide for additional information.

In order for learners or their approvers to pay for a course enrollment with tokens:

- They must have the required amount of tokens in their account.
- The course's Charge Procedure (in the Catalog Editor's Cost Information page) must be set to Online Payment.
- At enrollment, the tokens are deducted from the learner or approver, not from their organization's token account.

When organizations pay a one-off charge for all enrollments in a course:

- The course's Charge Procedure must be set to Organization One Off Token Payment.
- In the course Cost Information page, the course administrator selects the organization to charge. Once the tokens have been deducted from the organization's token account, members of that organization can enroll in the course without further charge.
- The tokens are taken from the first value balance (that hasn't expired) in the organization token account list.

To enable learners to pay for courses with tokens, you can either add tokens directly to their user accounts, or set up token packages for their organization, which they can buy, consisting of a number of tokens charged at a particular cost. For each organization you can set up multiple token packages with different costs.

To enable organizations to pay a one-off charge for course enrollment, you also must set up an organization token account, which is charged when you make the one-off payment for a course.

Course administrators configure courses and sessions to accept token payments in the Catalog Editor's Cost Information page.

Create an Organization Token Account

You can create an organization token account to enable the organization's learners to buy token packages and to enable an organization to pay for course enrollments using a one-off token payment. After creating an organization token account you associate it with an organization.

When you have created an organization token account, you need to configure its permissions so that other administrators can view or edit it, and learners can buy token packages from it.

> To create an organization token account, your user role must have unrestricted access to the *Organization Token Accounts* feature in System Roles (Manage Features > Payment Manager).

To create an organization token account

1. Go to **Manage Center > Learning > Payment Manager > Organization Token Accounts**.
2. Click **+ Create new token account**.
3. Enter a unique Account Name and then click **+ Create Token Value**.
4. Enter the Token Value and, if applicable, an Expiry Date.
5. Repeat steps 3 and 4 to add more token values, if required.
6. Click **Save**.

You can make the following updates to Organization Token Accounts after they are created:

You can update the tokens in an organization token account by:

- Adding discrete token values with expiry dates, if required
- Updating the organization's token values
- Deleting token values
- Transferring some or all of a token value to another organization

To make these updates, access the relevant Token Account and adjust as needed.

Associate an Organization Token Account with an Organization Account

To use an organization token account you must first link it to an organization. Associating a token account with a parent organization does not associate it with that organization's child organizations.

To edit an organization your user role must have unrestricted access to the *Allow Organization Maintenance* Data Access Control.

To associate an organization token account with an organization

1. Go to **Manage Center > Users > Group and Organization > Organization Maintenance**.
2. Right-click on the organization you want to associate the organization token account with and select **Edit**.
3. In the Enrollment & Payment section, select the token account to associate with the organization.
4. Click **Save**.

Create a Token Package

Tokens can be grouped in packages to be sold to learners, and can have different pricing options. When learners buy a package, the tokens in it are transferred to their organization's account.

To create a token package your user role must have unrestricted access to the *Payment Manager* Manage Features in System Roles (Manage Features > Payment Manager). The System Administrator role has this access by default.

After creating a token package, configure its read-only permissions so that learners can buy it.

To create a token package

1. Go to **Manage Center > Learning > Payment Manager > Token Packages**.
2. Click **+ Create Token Package**.
3. Enter the token package details. For more information, see Token Package Field Reference.
4. Click **Save**.

Add Tokens to a User's Token Account

You can add tokens to user accounts to enable them to enroll in courses that have been configured to accept token payments. You can also update users' token amounts to increase or decrease the balance as required.

To add or update a user's token account your user role must have unrestricted access to the *User Manager* and *Users* features in System Roles (Manage Features > User Manager Features). You must also have data access permission for *Show Tokens Tab* and *Allow Token Manuel Adjustment* in System Roles (Data Access Control > Role General Permissions).

To add tokens to a user's token account

1. Go to **Manage Center > Users > User Manager > Users**. Select the user whose token account you want to update.
2. Click **Token Account**.
3. If the user has no tokens, enter the Token Value. To adjust the tokens in an existing balance, input the New Token Value to add or remove them.
4. Enter the Expiry Date for the tokens, if required. The user cannot use the tokens after the expiry date.
5. Click **Adjust/add tokens** to update the user's token account.
6. Repeat steps 3 to 5 to add tokens with different expiry dates, if required.

Import Token Account Data

You can use the Token Account Data Loader to initialize (create) and delete organization token accounts, and add tokens to them. You cannot deduct tokens from a token account using the data loader.

The Token Account Data Loader imports a comma—or semicolon—separated values (CSV) file containing a heading row and any number of data rows. You can download and fill in a template CSV file from the Token Account Data Loader page.

The following guidelines apply:

- To **initialize** a token account, your CSV file must have values for *Action* and either *Level1Desc* or *UserID*. In addition, if you leave the TokenAccountName field blank, it is derived from the organization structure given in the organization level(s) or from the UserID.
- To **delete** a token account, your CSV file must have values for *Action* and *TokenAccountName*. If more than one token account matches the TokenAccountName in the CSV files, the delete action will fail.
- To **add** tokens to a token account, your CSV file must have values for *Action*, *TokenValue*, and either the organization (at least *Level1Desc*), or the *UserID*.

To import token account data, your user role must have unrestricted access to the Token Account Data Loader feature in System Roles (Manage Features > Payment Manager).

To import token account data

1. Go to **Manage Center > Learning > Payment Manager > Token Account Data Loader**.
2. If required, download the CSV file template and enter the token account information in the relevant fields. For additional information, please see Token Account Data Loader Field Reference.
3. Click **+ Import CSV file**.
4. Click **Choose File** to select the CSV file to upload.
5. Optionally, enter a description for the upload.
6. If your CSV file was saved with a specific file encoding, the LMS can automatically detect it, otherwise you can select it from the *Encoding* list.
7. Select the delimiter used to separate fields in your CSV file. This is a comma in the downloadable CSV file template. Alternatively, you can use semicolons in your own CSV files.
8. Click **Preview**. The contents of the CSV file are shown in the Data Loader page so that you can review the data before importing the file.
9. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
10. To view the import log file or error report, go back to the Token Account Data Loader page.

One-Off Token Payments

Pay for a Course with One-Off Token Payments

As a course administrator, you can pay a one-off token amount for enrollment in a course for one or more organizations instead of charging for each individual enrollment. When you configure the cost information for a learning module or session, you can deduct a token payment from one or more organizations. Their learners can then enroll in the course without further charge.

By default, organization enrollment constraints (specified in the session's *Edit session properties* page or the module's enrollment policy) are adjusted so that the organizations you select for a one-off payment are added to the list of organizations with access to the individual session or module as a whole. Alternatively, you can choose to keep the organization constraints.

To pay for course enrollment with a one-off token payment

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to deduct a token payment for.
2. To deduct a token payment for a specific session, Click **Session Properties** and select the session to edit. Otherwise go to step 3.
3. Click **Enter cost information** in the **Session Properties** or **Module Properties** tab.
4. Select **Organization One Off Token Payment** from the **Charge Procedure** drop-down list.
5. In the **Cost** field enter the number of tokens to deduct to pay for the enrollments of all members of an organization.
6. Click **Deduct Payment**.
7. Click the **Select Organization** link to select one or more organizations from which to deduct the token payment.
8. If you want to keep the organization constraints, clear the **Adjust Organization Constraints** check box.
9. Click **Continue** and then **Confirm Payment** to deduct the token payment. The organizations from which the token payment was deducted are listed in the **Related Token Transactions** section.

Refund a One-Off Token Payment

As a course administrator, you refund a pay a one-off token amount to an organization that has made a one-off payment for course enrollment. When you refund an organization, its learners will no longer be able to access the course or session for which the payment was made.

By default, organization enrollment constraints (specified in the session's *Edit session properties* page or the module's enrollment policy) are re-adjusted so that the refunded organization is removed the list of organizations with access to the individual session or module as a whole.

To refund a one-off token amount to an organization

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to refund a token payment for.
2. To refund a token payment for a specific session, Click **Session Properties** and select the session to edit. Otherwise go to step 3.
3. Click **Enter cost information** in the **Session Properties** or **Module Properties** tab. The Cost Information page opens with a list of organization token payments in the Related Token Transactions section.
4. Click **Refund** for the token payment you want to refund.
5. If you want to keep the organization constraint adjustments that were made when the token payment was made, clear the **Adjust Organization Constraints** check box.
6. Click **Confirm Refund**. The refund is added to the list of token transactions and the tokens are credited to the organization's token account.

Create and Manage Optional Payment Items

Optional Payment Items are resources can buy along with a course that is configured for online payment. You might want to set up optional payment items for generic categories of resources that are available for multiple courses, such as participant packs or accommodation.

You can configure the cost of optional payment items per module or per session, so each course can have its own pricing. Item labels can also be localized so that they are displayed in the user's preferred language, subject to the availability of language bundles.

Create an Optional Payment Item

To create an optional payment item

1. Go to **Manage Center > Learning > Payment Manager > Optional Payment Items**.
2. Click **+ Add Payment Item**.
3. Enter the name of the item.
4. Optionally, enter the translation label key if you want the item to be displayed in other languages. Leave this field blank to use the value provided for the item name.
5. Optionally, enter a description for the item.
6. Click **Add** to save the item.

Update an Optional Payment Item

To update an optional payment item

1. Go to **Manage Center > Learning > Payment Manager > Optional Payment Items**.
2. Click the name of the item to update.
3. Make the necessary updates.
4. Click **Update.**

Delete an Optional Payment Item

To delete an optional payment item

1. Go to **Manage Center > Learning > Payment Manager > Optional Payment Items**.
2. Click the name of the item to delete.
3. Click **Delete.**
4. Click **OK**.

Create and Manage Cost Accounting Categories

Cost accounting categories allow you to categorize additional costs associated with course sessions. These categories are then available for selection in the **Cost Accounting Information** page in a learning module's session properties.

Create a Cost Accounting Category

To create a cost accounting category

1. Go to **Manage Center > Learning > Payment Manager > Cost Accounting Categories**.
2. Click **+ Create Accounting Category**.
3. Enter the category name and click **Save**.

Edit a Cost Accounting Category

To edit a cost accounting category

1. Go to **Manage Center > Learning > Payment Manager > Cost Accounting Categories**.
2. Locate the appropriate cost accounting category and select **Edit Cost Accounting Category** from the action menu.
3. Edit the name as necessary.
4. Click **Save**.

Delete a Cost Accounting Category

To delete a cost accounting category

1. Go to **Manage Center > Learning > Payment Manager > Cost Accounting Categories**.
2. Locate the appropriate cost accounting category and select **Delete Cost Accounting Category** from the action menu.
3. Click **OK**.

View Course Payment History

You can search for and view details about course payment transactions for your organization.

> To view payments in the Course Payment History, your user role must have read-only or unrestricted access to the *Payment History* feature in System Roles (Manage Features > Payment Manager).

Access Course Payment History

1. Go to **Manage Center > Learning > Payment Manager > Payment History**.
2. To locate specific transactions, take one of the following actions:
    - Enter the transaction number and click **Retrieve.**
    - Enter a value in the **User ID**, **From Date** and/or **To Date**, and then click **Search**.

Mark Transactions as Reviewed or Not Reviewed

To mark transactions as reviewed or not reviewed

1. Go to **Manage Center > Learning > Payment Manager > Payment History**.
2. Locate the appropriate transactions and click the associated checkbox(es).
3. Select **Mark as reviewed** or **Mark as not reviewed**.

Create a PDF Invoice

You can create a PDF invoice for organizations with payment plans that allow organization-level approvers to pay for enrollment on receipt of an invoice,

To create an invoice

1. Go to **Manage Center > Learning > Payment Manager > Payment History**.
2. Locate the appropriate transaction and click the Transaction Reference number to open it.
3. Click the **Invoice** link located below the transaction details.
4. The LMS creates a PDF which you can view or save from your browser.

Change the Status of an Enrollment

You can change the status of an enrollment for which a payment was made.

1. Go to **Manage Center > Learning > Payment Manager > Payment History**.

2. Locate the appropriate transaction and click the Transaction Reference number to open it.
3. In the **Transaction Enrollments** section, select the new enrollment status from the **Overall Status Change** drop-down list.
4. Click **Apply Changes**.

Manage Course Participants as a Course Administrator

Course administrators have several options for managing course participants in learning modules, sessions and programs.

Change a Participant's Overall Status

You can change the overall status for participants for session-based learning types.

Change a Participant's Overall Status in the Catalog Editor

Assign Learners to a Group Training Plan

Course administrators can assign and unassign a Learning Module to the training plans for a group of learners. When you run the group training plan assignment, the course is listed in the learners' training plan and Career Center. Learners are not enrolled into the course or any of its sessions by this process. They can open the Course Details from the Training Plan or Career Center and enroll from there.

Assign Learners to a Group Training Plan

Group Enroll or Withdraw Learners in a Session

Course administrators can group enroll learners in a course session individually or based on role, organization, user group and user attributes. When you group enroll learners, the enrollment policy configured for the learning module is ignored and you can also bypass enrollment restrictions on the session.

Group Enroll or Withdraw Learners in a Session

Update Program Session Enrollment

When the structure of a program session changes, it is sometimes necessary to explicitly update enrollments to reflect the new structure. Session Enrollment Update re-runs enrollment processing for the session.

Update Program Session Enrollment

Enrollment Substitution

Enrollment substitution enables you to replace a participant enrolled in a session with another participant. **Note**: Enrollment substitution is available only for the Learning LMS license.

Enrollment Substitution

Re-Enroll Participants in an Alternative Session

Learners can reach a terminal enrollment status that does not attain credit, such as *Dropped from Waitlist*, *Failed* or *No Show*. If the course is mandatory, course administrators can re-enroll those learners in an alternative session, either individually or in bulk.

Re-enroll Participants in an Alternative Session

Transfer Participants to Another Session

You can transfer participants from one learning module session to another, as long as they have not completed their current session.

Transfer Participants to Another Session

Update a Participant's Deadline

You can update the course session completion deadline for one or more participants who have one of the following transcript statuses: *Waitlisted, Not Started, In Process, Pending Approval.*

Update a Participant's Deadline

Email Course Participants from Learning Modules

Course administrators can send one-off emails to session participants from Learning Module sessions. You can create a custom email to send to multiple participants, or send a standard email notifications to individual participants. The choice of standard emails will depend on the email templates selected in the sessions email preferences.

Email Course Participants from the Learning Module

Indicated Interest List Administration

You can review all learners who have indicated interest in any course. From the Indicated Interest List Administration page, you can email users and remove them from the lists.

Indicated Interest List Administration

The Progress Tracker

The Progress Tracker, aimed primarily at learners, provides a calendar view of their current progress through the programs and sub-modules they are enrolled in.

The Progress Tracker

Import Training Records

Course administrators can import training records (internal and external) for participants.

Import Training Records via the Data Loader

Import External Training Records via the Data Loader

Change a Participant's Overall Status in the Catalog Editor

You can change the overall status for participants for session-based learning types.

When you change a participant's overall status, it may affect their eligibility for competencies and certifications, and could result in new ones being awarded or existing ones revoked. Therefore, the following limitations apply when changing the overall status:

- Only the participant's latest transcript can be changed from a Completed to an Incomplete status.
- If the transcript contributes to one or more programs for the learner, all program transcripts must be set to Incomplete before the sub-module transcript can be changed from Completed to Incomplete.

This topic focuses on changing overall status of participants by a course administrator in the Catalog Editor. Status can also be changed by instructors and other administrators in the Teach section. For information, please see Change the Overall Status of Class Participants in Teach.

To change a participant's overall status in the Catalog Editor for a session, you must have unrestricted access permission for the module or session and a role with unrestricted access to the Catalog Editor - Session Management feature in System Roles (Manage Features > Catalog Manager Features). The list of Transcript Statuses that you see in the participants list filters and Overall Status Change drop-down list also depends on permissions.

To view a in the Manage Center the list of participants enrolled in a session

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules**.
2. Locate the appropriate learning module and open it.
3. Click **Session Properties** to select a session.
4. Select a session from the drop-down list and click **Go**.
5. Click **Participants** in the Session Properties tab. The Participants page opens with a list of participants who have a transcript record for the session.
6. Select the new status from the **Overall Status Change** drop-down list.

Assign Learners to a Group Training Plan

Course administrators can assign and unassign a Learning Module to the training plans for a group of learners. When you run the group training plan assignment, the course is listed in the learners' training plan (Learning Center > Training Plan) and Career Center. Learners are not enrolled into the course or any of its sessions by this process. They can open the Course Details from the Training Plan or Career Center and enroll from there.

To assign learners to a group training plan

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules**.
2. Locate the appropriate learning module and open it.
3. Click **Session Properties** to select a session.
4. Select a session from the drop-down list and click **Go**.
5. Click **Participants** in the Session Properties tab. The Participants page opens with a list of participants who have a transcript record for the session.
6. Click **Group Training Plan** in the **Session Properties** tab.
7. Click the **Select participant(s)** link.
8. Select the learners. You can choose learners based on role, organization, user group or user attributes.
9. Click **OK**. The learners selected are listed in the *Select participant(s)* box.
10. To remove the learning module from the selected learners' training plan, select **De-assign this module** from the Action drop-down list. Otherwise, leave it as **Assign this module**.
11. If the learning module has previously been assigned to a learner, the assignment details are updated by default when you assign it again. To keep the previous assignment details, such as the requested completion deadline, clear the **Update existing plans** check box.
12. To notify the selected learners by email that the learning module has been added to their training plan, click the **browse** icon to select an appropriate notification email template.
13. Optionally, enter a comment that appears in the learners' training plans.
14. Select a priority from the drop-down list to indicate to the importance of taking the course. The priority is shown in the learners' training plans.
15. Optionally, select a date by which you would like the learners to have completed the course. The priority is shown in the learners' training plans.
16. Click **Execute group plan assignment** to assign the learning module to the learners' training plans.

Group Enroll or Withdraw Learners in a Session

Course administrators can group enroll learners in a course session individually or based on role, organization, user group and user attributes. When you group enroll learners, the enrollment policy configured for the learning module is ignored and you can also bypass enrollment restrictions on the session.

> When you group enroll learners any payment requests are bypassed, therefore the course is offered for no charge.

You can also withdraw learners from an enrollment using the same bases as group enrollment for the user selection criteria.

> To group enroll (or withdraw) learners in a course session, you must have a system role with unrestricted access to the *Auto/Group Enroll* option under Manage Features > Catalog Manager Features.
>
> To bypass enrollment restrictions, the *Allow Enrollment Override* Role Access Permission must be enabled for your system role.

To group enroll or group withdraw learners

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning module you want to group enroll learners for.
2. Click **Session Properties** to select a session to enroll learners into.
3. Select a session from the drop-down list and click **Go**.
4. Click **Group Enroll** in the **Session Properties** tab.
5. Click the **Select participant(s)** link to select the learners to enroll in the session.
6. Select the learners to include in the group enroll and click **OK**. The learners selected for group enrollment are listed in the *Select participant(s)* box.
7. To group enroll the selected learners, ensure *Group Enrollment* is selected in the Action drop-down list. To group withdraw the selected learners from an enrollment, select **Group Withdraw** from the Action drop-down list.
8. To suppress automatic emails that would normally be sent when the selected learners are enrolled in a session, select the **Suppress automatic emails** check box.
9. To bypass enrollment restrictions and checks for valid enrollment during the group enrollment, select the **Override?** check box.

10. To run prerequisite checks configured for the learning module on the selected learners before enrolling them, select the **Perform prerequisite checks?** check box. Learners who fail to meet the prerequisites are not enrolled.
11. To exclude learners from the group enrollment if it conflicts with another course they are enrolled in, clear the **Ignore Schedule Conflict** check box.
12. Enter the charged cost center, if required for the session.
13. Click **Execute group enroll** to start the group enrollment process. The Group Enrollment status page opens in a new window and lists the learners who were selected for group enrollment and their enrollment status (whether successful or not).

Update Program Session Enrollment

When the structure of a program session changes, it is sometimes necessary to explicitly update enrollments to reflect the new structure. Session Enrollment Update re-runs enrollment processing for the session.

To run session enrollment update

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules.**
2. Locate the appropriate learning program and click to open it.
3. Click **Session Properties** and select the appropriate session.
4. Click **Session Enrollment Update** at the bottom of the **Session Properties** tab.
5. Select the options for the enrollment update:
    - **Update current program session enrollments** - Check this option to affect only the learners who are enrolled in the current program session. For example, if a new module is added, this update will enroll currently enrolled learners onto the new module as part of the program. Learners who have already completed the program are not affected.
    - **Re-enroll users who have previously completed the program session** - Check this option to re-enroll learners who have previously completed the session. Learners who complete the session hereafter are not affected.
    - **Only re-enroll if user's current job profiles include this program** - Check this option so that only the learners who have at least one current job profile assignment that involves this program will be re-enrolled.
    - **Check here if you want to send an e-mail update notification to each affected user** - Check this option to send an email notification to the enrollees.
6. Click **Execute session update**. You are prompted to confirm the update before re-enrollment processing starts.

When a session enrollment has completed, a new window opens, listing the participants who have been re-enrolled and their update status.

Enrollment Substitution

Enrollment substitution is available only for the Learning LMS license. It enables you to replace a participant enrolled in a session with another participant. To substitute a participant, the following prerequisites must be satisfied:

- The system configuration setting *Show enrollment substitution in session properties of catalog editor* must be enabled.
- The session cannot be for a program learning module.
- The overall status of the selected participant must be *Not Started* or *In Process*.
- The session must have not started.

To substitute participants for enrollment

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules**.
2. Locate the appropriate learning module and open it.
3. Click **Session Properties** to select a session.
4. Select a session from the drop-down list and click **Go**.
5. Click **Participants** in the Session Properties tab. The Participants page opens with a list of participants who have a transcript record for the session.
6. For a single participant, select **Enrollment Substitution** from the action menu or select a new overall status from the drop-down list.
7. For multiple participants, check their boxes to select them and select **Enrollment Substitution** from the **Bulk Action** drop-down list.
8. To send an email notification to the substituted user, be sure the **Send Notification Emails** checkbox is selected.
9. Click **Substitute**.

Re-enroll Participants in an Alternative Session

Learners can reach a terminal enrollment status that does not attain credit, such as *Dropped from Waitlist*, *Failed* or *No Show*. If the course is mandatory, course administrators can re-enroll those learners in an alternative session, either individually or in bulk.

You can re-enroll participants in an alternative session only if they do not already have an active transcript status for the same learning module in their course history record.

To re-enroll participants in an alternative session

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules.**
2. Locate the appropriate learning module and open it.
3. Click **Session Properties**.
4. Select the original session from the drop-down list and click **Go**.
5. Click **Participants** in the **Session Properties** tab. The Participants page opens with a list of participants who have a transcript record for the session.
6. Take one of the following actions:
   - To re-enroll a single participant, locate the appropriate learner and select **Re-enroll to alternative session** from the action menu.
   - To re-enroll multiple participants, click the check boxes for the appropriate learners and select **Re-enroll to alternative session** from the **Bulk Actions** drop-down list.
7. Select an alternative session from the drop-down list and click **Enroll**. The dialog closes and the Group Enrollment page opens with the participant(s) pre-selected for enrollment in the selected session.
8. Click **Execute group enroll** to complete the re-enrollment.

Do not click the Save icon on the Group Enrollment page—it resets the form.

Transfer Participants to Another Session

You can transfer participants from one learning module session to another, as long as they have not completed their current session.

> To transfer participants to another session, your user role must have unrestricted access permission for the *Session Transfer* feature in System Roles (Review Features > Review Submenu Features).

To transfer the eligible participants

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules**.
2. Locate the appropriate learning module and open it.
3. Click **Session Properties** to select a session.
4. Select a session from the drop-down list and click **Go**.
5. Click **Participants** in the Session Properties tab.
6. Locate the appropriate participant and select **Session Transfer** from the action menu.
7. Select a new session from the drop-own and click **Transfer**. The participant who has been transferred is removed from the participants list for the current session. Participants who have been transferred to a new session receive an email notification.

Update a Participant's Deadline

You can update the course session completion deadline for one or more participants who have one of the following transcript statuses: *Waitlisted, Not Started, In Process, Pending Approval.*

To update a participant deadlines

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules**.
2. Locate the appropriate learning module and open it.
3. Click **Session Properties** to select a session.
4. Select a session from the drop-down list and click **Go**.
5. Click **Participants** in the **Session Properties** tab.
6. Take one of the following actions:
    - To update a deadline for a specific participant, locate the appropriate participant and select **Update Deadline** from the action menu.
    - To update the deadline for multiple participants, select the check boxes for each one and click **Update Deadline** from the **Bulk Action** menu.
7. Select one of the following options:
    - Remove an existing deadline
    - Set the new deadline at a specified number of days after their enrollment date
    - Set the deadline to a specific date
8. Click **Preview** to see the new course completion deadline for each participant.
9. Click **Update** to apply the deadline update(s).

Email Course Participants from the Learning Module

Course administrators can send one-off emails to session participants from Learning Module sessions. You can create a custom email to send to multiple participants, or send a standard email notifications to individual participants. The choice of standard emails will depend on the email templates selected in the sessions email preferences. Depending on set up, one or more of the standard notifications is available:

- Enrollment Confirmation
- Module Not-Yet-Accessed Reminder
- Gentle Completion Reminder
- Gentle Deadline Reminder
- Start-of-Session Reminder
- Completion Notification
- Session Waiting Reminder
- Session Finish Notification
- Escalation of Completion Reminder

An email template must be specified for each type of notification for it to be available to send to a participant.

Send an Email to a Single Participant

To send an email to a single participant

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules**.
2. Locate the appropriate learning module and open it.
3. Click **Session Properties** to select a session.
4. Select a session from the drop-down list and click **Go**.
5. Click **Participants** in the **Session Properties** tab.
6. Locate the appropriate user.
7. Click the action menu and select one of the available emails.

Send an Email to Multiple Participants

To send a custom email to multiple participants

1. Go to **Manage Center > Learning > Catalog General Settings > Learning Modules**.
2. Locate the appropriate learning module and open it.
3. Click **Session Properties** to select a session.
4. Select a session from the drop-down list and click **Go**.
5. Click **Participants** in the **Session Properties** tab.
6. Click the checkboxes for each participant you would like to include on the email.
7. Select **Send Email** from the **Bulk Action** menu.

Indicated Interest List Administration

Indicated Interest List Administration allows you to review all learners who have indicated interest in any course. From the Indicated Interest List Administration page, you can email users and remove them from the lists.

This topic focuses on managing the lists from the Administration page. Course administrators can also manage the Indicated Interest List for individual learning modules. For information, please see Learning Module Properties - Catalog Set Up.

To administer the indicated interest list, your user role must have unrestricted access to the *Catalog Manager* feature in System Roles (Manage Features > Catalog Manager Features).

To open the Indicated Interest List Administration page

1. Go to **Manage Center > Learning > Catalog General Settings > Indicated Interest Administration**.
2. Take one of the following actions:

   - To send an email to an individual learner for a specific course, locate the appropriate learner and select **Send Mail** from the action menu.
   - To send an email to multiple learners, select the corresponding check boxes in the list and the select **Send Mail** from the **Bulk Action** drop-down list.
   - To remove a learner from an indicated interest list for a course, locate the appropriate learner and select **Remove** from the corresponding action menu.
   - To remove multiple learners from indicated interest lists, select the corresponding check boxes in the list and the select **Remove** from the **Bulk Action** drop-down list.

The Progress Tracker

The Progress Tracker, aimed primarily at learners, provides a calendar view of their current progress through the programs and sub-modules they are enrolled in.

It can be opened from the following areas:

- Current Learning Modules
- Knowledge CenterCourse Details
- Training Progress Widget
- Compliance Analytics
- Review Career Development Center

The Progress Tracker can list all top-level programs or modules within the program, and gives a visual display of their deadline status when modules are due. The calendar, by default, shows one calendar year of information with the current month centered. Information such as the module's enrollment date, completion date, program due date and module's due date are also displayed.

You can filter the Progress Tracker to show all of the program's sub-modules or only incomplete sub-modules. You can also choose whether to include optional sub-modules.

You can sort the program's sub-modules by deadline or module status.

Email

You can create emails from the Progress Tracker. Inside the email creation dialog the learner can attach the snapshot of the current view from the Progress Tracker. This creates an image file and attaches it to the email.

Notification

To enable higher visibility of deadlines for modules and their programs, learners can access more information via the *Deadline Details* link. The link is available from the following pages:

- Personal Calendar
- Learning Path
- Knowledge CenterCourse Details
- Current Learning Modules

Import Training Records via the Data Loader

Administrators can import training records (transcripts) for learners in bulk via the Training Records CSV Loader. This allows you to create and modify learners' training records externally from the LMS. By importing training records, you can create new learning programs, modules, and sessions, while also indicating learners' overall transcript statuses and assessment scores.

Create the CSV Import File

To create the CSV import file:

1. Go to **Manage Center > Learning > Import > Training Records CSV Loader**.
2. Download the CSV file template.

Prepare the File for Import

Once you have created the CSV import file, you prepare it for import by entering the necessary values in the fields. For detailed information about formatting data for the Training Records CSV Loader, please see Training Records CSV Loader Field Reference.

Importing the Training Records File

To import training records

1. Go to **Manage Center > Learning > Import > Training Records CSV Loader**.
2. Click **+ Import CSV file**.
3. Click **Choose File** to select the CSV file to upload.
4. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.
5. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.
6. In step 7, you will determine if the import will skip enrollment checks. If you are going to do enrollment checks, and do not wish for users to be notified of any discrepancies, select the **Suppress automatic e-mails** check box to stop notification emails being sent to users.
7. Select the **Skip enrollment check** check box to skip enrollment checks on prerequisites, seat numbers, approvals, and so on, which may not be necessary for historical records. Please review the following caveats related to skipping enrollment checks:

    - You can only create new training records. Existing training records cannot be updated.
    - The Transcript-Overall Status cannot be set to *Deactivated*.

- The Transcript-Overall Status cannot be set to *Completed* for Programs.
- The CSV import cannot create multiple enrollments for the same user and learning module.
- Awarding competencies and certificates according to definitions at the time of completion is not supported.
- New learning objects will always be created for Learning IDs that do not exist.
- The LOTYPE (Learning Type) field is required to indicate the learning type for the record (including top-level programs).
- Sessions can be updated where they allow instructors to be added to old modules.

8. Select the **Create learning objects for new Learning IDs found in the file** check box to create new learning objects. The system configuration setting, *Automatically create learning objects when using dataloader*, must also be enabled.
9. Click **Preview**. The contents of the CSV file are shown in the Data Loader page.
10. Click **Upload** to import the CSV file. The Summary Report displays the count of records that were successfully imported from the file as well as those that failed.

Import External Training Records via the Data Loader

You can import external training records for learners in bulk via the External Training Records CSV Loader. This enables you to create and update learners' external training records outside of the LMS.

Create the CSV Import File

To create the CSV import file:

1. Go to **Manage Center > Learning > Import > External Training Records CSV Loader**.
2. Download the CSV file template.

Prepare the File for Import

Not every heading requires values for importing an External Training Records CSV file, although specific fields must contain values based on the action and type of learning module.

When creating external training records, the mandatory fields are:

- Action
- UserId
- Title

When updating a learner's record, the mandatory fields are:

- Action
- RecordID
- Any additional fields to be updated.

To delete a learner's record the mandatory fields are

- Action
- RecordID

For detailed information about formatting data for the External Training CSV Loader, please see External Training Records CSV Loader Field Reference.

Note that CSV files are likely to be opened by Microsoft Excel if it is installed on your system. If you encounter any problems with importing a CSV file into the LMS, it could be caused by Microsoft Excel applying extra formatting to the file. Alternatively, you can edit CSV files in a text editor instead of Microsoft Excel. The data should conform to the formatting required by the template as specified in the corresponding CSV Formatting Help.

If the values for text area fields include punctuation, these fields must be enclosed in double quotation marks (" "). Do not include commas or semicolons in other fields as they could be interpreted as a field delimiter (depending on your choice of delimiter at import).

Import the External Training Records File

To import external training records:

1. Go to **Manage Center > Learning > Import > External Training Records CSV Loader**.
2. Click **+ Import CSV file**.
3. Click **Choose File** to select the CSV file to upload.
4. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.
5. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.
6. Click **Preview**. The contents of the CSV file are shown in the Data Loader page.
7. Click **Upload** to import the CSV file. The Summary Report displays the count of records that were successfully imported from the file as well as those that failed.

Information about Learning Types

The LMS accommodates various learning types, such as online courses (internal or external), virtual classes (live and archived), instructor-led classroom sessions, workshops, on-the-job training, assessments, and blended learning programs.

Each learning type has specific configuration requirements and properties. Once a learning module is created, its learning type cannot be changed.

Classroom Learning Type

The Classroom learning type involves schedule-based classroom training, often spanning multiple sessions and locations, requiring detailed configuration. Courses occur at physical training centers, utilize specific resources, provide participant reference materials, and necessitate instructors—all of which must be configured for the learning module.

Each Classroom learning module must include at least one session, representing a complete course instance with a specific participant capacity. Assessment within this learning type is conducted through the LMS Exam functionality.

Just-in-Time Learning Type

The Just-in-Time learning type typically consists of quick-to-learn material accessed through an external provider. These courses are often available for launch at any time and can be accessed any number of times.

Online Learning Type

Online learning, accessed via the web or intranet, is typically available in SCORM, AICC, or xAPI format. However, it can also include links to other resource types.

On-the-Job Training Learning Type

The On-the-Job Training (OTJ) learning type enables supervisors to evaluate participants' performance upon completion. To finish an OTJ training course, one or more supervisors and a supervisor assessment exam must be assigned to an OTJ learning module or session. The course concludes for the learner once the supervisor completes the assessment exam.

Program Learning Type

The Program learning type is used to create a Learning Program. Learning programs group together related learning modules into a learning curriculum.

Task Learning Type

Tasks are lightweight courses and can be used to track snippets of training, or to track the accomplishment of specific piece of work. For example, training for machine operation might consist of the following tasks:

- Read the machine operation manual
- Observe demonstration given by a certified trainer
- Duty manager confirmation for skills acquired

Task learning types include a sign-off section where designated approvers can verify a learner's completion of tasks.

Virtual Classroom Learning Type

The Virtual Classroom learning type offers a link to a scheduled virtual classroom training session, usually a webinar or video conference, enabling learners to engage with the instructor.

Virtual Classroom (Archived)

This provides a link to a recorded virtual classroom session.

Additional Learning Types

Other learning types supported by the LMS are:

- Certification
- Workshop
- Coaching
- External
- Book
- CD
- Video
- Audio

Module Properties Field Reference

The tables below describe general learning module properties relating to course setup. This information is used to classify the course entry within a catalog.

Learning Module Details

The information in this section is used to classify the course entry within the catalog.

Property	Description
Title	The module title appears in the catalog and the course details page. It should be concise and explicit. Module titles are saved in the learner's transcript (their learning record), they are searchable in the catalog, and could even be used for legal or regulatory purposes. This is a mandatory field.
Description	The module description appears in the catalog and the Course Details page. It should be concise and explicit. Module descriptions are saved in the learner's transcript, they are searchable in the catalog, and could even be used for legal or regulatory purposes.
More Information Hyperlink	You can enter a link to a website with information or resources related to the course. The More Information Hyperlink is shown in the Course Details and Knowledge Center.
Language	All learning modules can be delivered in a specific language you select from the list. For learning modules with more than one session, such as classroom-based courses available in different locations, you can define the learning module as multi-language and specify the delivery language for each session. The languages available are determined by the languages purchased by your organization. The languages available for the module are shown in the Catalog Browser, Catalog Search results, Course Details and Knowledge Center. This is a mandatory field.

Vendor	You can select the course vendor from the drop-down list. This information is not shown in the Course Details. For information about managing Vendors in the LMS, please see Create and Manage Course Vendors.
Duration Comments	You can add the course duration, which is shown in the Course Details and Knowledge Center.
Support Contact	You can enter the name of one or more people who can provide learners with support for enrollment or participation in the course. This information is shown as plain text in the Course Details and Knowledge Center (that is, HTML markup, such as email links, are not implemented).
Enable Progress Tracker	Check this box to enable the Progress Tracker for Programs. The Progress Tracker shows learners their month-by-month progress through each of the Program's constituent modules on a calendar page. When enabled, the Progress Tracker link is shown for the Program on the Current Learning Modules tab on the Learning page, and also in the Training Progress widget on the Widget page. This property applies only to Program learning types.
Display "Indicate Interest"	Check this box to enable learners to indicate their interest in taking the course if they are unable to enroll. You can enable them to provide up to three preferred dates and a comment, or just a comment. Allowing learners to indicate their interest in taking a course can be useful for scheduling classroom or virtual classroom sessions. If you provide this option, a link is shown in the Course Details, enabling learners to indicate their interest. The Indicate Interest property is not applicable to Just-in-Time learning modules.

Show on other resources tab instead of enrolled learning modules tab (tabbed interface only)	This check box is shown only if the *Show other resources tab (tabbed interface only)* System Configuration setting is enabled. Select this check box to show the learning module in the Other Resources page in the Learning Center.
	
	The Other Resources page must be included in the navigations.xml file used for the LMS's skin, as shown in this example navigations.xml extract:
	
	`<item labelKey="label.LearningCentre" txCode="TABLISTSESSIONS">`
	`      <menu cssClassName="submenu">`
	`        <item labelKey="heading.currentCourses" txCode="TABLISTSESSIONS" />`
	`        …`
	`        <item labelKey="label.Other_Resources" txCode="OTHERRESOURCES" />`
	`        …`

Catalog Configuration

You can assign modules to one or more catalogs using the Catalog Configuration properties.

Property	Description
Visibility	Check this box to show the learning module in the catalog or catalogs you select in the *Assign catalog* field. Only check this box for courses that learners can enroll themselves in. If you don't need learners to see the course details in the catalog, you can clear this check box. **Select the Show in Catalogs check box last, after you have saved all the other module properties**. As soon as you save the properties in the Catalog Editor (with this check box selected), the module becomes visible to learners looking for courses. If other essential properties have not been configured yet, learners may encounter errors if they try to enroll in the course.

Category	You can select a category from the drop-down list to assign the learning module to it. You can use categories to group courses with related subjects. Learners can refine a catalog search by subject but not category. Admins can search on both category and subject, via the advanced filters on the Learning Modules page in the Manage Center. For information about managing course categories, please see Create and Manage Course Categories.
Subject	You can select a subject from the drop-down list to assign the learning module to it. A subject is the general topic covered by the course. You can group courses with related subjects in a particular category to help you organize your learning modules. Learners can refine a catalog search by subject. For information about managing course subjects, please see Create and Manage Course Subjects,
Assign catalog	You have to add a module to a catalog so that it can be found in Catalog Search. You can add a module to multiple catalogs. Click the Assign catalog field name to open the Catalog Selector, where you can select one or more catalogs to add the course to. The catalogs the module has been assigned to are listed in the box. For information about managing catalogs, please see Introduction to Course Catalog Set Up.

Image for Catalog Display	Click the **browse** icon to open the Repository Manager, where you can select an image file to use in the catalogs the module has been added to. Images are displayed in different aspect ratios in the legacy user interface (UI) and new responsive UI. In the legacy UI, to see the whole image in the catalog, it must be no bigger than 150 x 150 pixels. If you select an image with greater dimensions, the Image Editor opens and you can either select a cropped area of the image to use, or scale the image to fit 150 x 150 pixels. Scaling non-square images changes the aspect ratio so they may appear stretched or squashed in one dimension. The new responsive UI displays course and catalog images in approximately a 16:9 width-to-height ratio. Any image size greater than 500 pixels wide can be used and will be scaled without distortion to fit. Click the **Reset** icon to reset the image to the default.

Who Should Take This?

You can describe one or more target audiences for the course.

Property	Description
Audience	You can enter a description of the target audience for the course. You can specify multiple audiences, each in their own *Audience* text box.

Collaboration Tools

You can select and configure the collaboration tools that are available to learners for the course.

Property	Description
Forum	Check this box to include in the Knowledge Center > Forum page a link to either the forum category or to a specific forum.

Peer Review/ Comments	Check this box to include the option for learners to rate the module and leave a comment in the Knowledge Center . All learners with access to the Knowledge Center for the course can see the rating and peer comments left by others.

Optional Module Attribute(s)

Enter values for optional module attributes. These can be included in the advanced filters on the Learning Modules page in the Manage Center.

Cost Information Field Reference

Cost/Enrollment Information

Property	Description
Charge Procedure	Select from the drop-down list how the course cost is registered and charged. Select **Charged per Registration** to register a charge each time a participant enrolls in the course. The cost is registered in the Accounts tab in the participant's profile. You cannot add optional payment items to this type of charge. Select **Online Payment** to enable the participant to make the payment via an online payment gateway or with tokens. Online payments can be configured to accept tokens or currency, and enable you to charge for optional payment items. Select **Organization One Off Token Payment** to charge a one-off amount for an entire module and debit this amount from the organization's token account instead of charging per individual learner enrollment. For sessions, you can choose to use the setting configured at the module level or select a different procedure.
Charged Cost Center	For non-token payment, you can enter the name of a cost center to associate the charge with. If you enter a cost center, it overrides the cost center defined for the learner (if applicable) in the User Editor. Otherwise, leave this field blank to use the learner's cost center. If the *Show additional enrollment information in records/ transcript* System Configration setting is enabled, the Charged Cost Center is shown in the Knowledge Center > Records/ Transcript area Course Details.
Currency	For non-token payment, select from the drop-down list the currency in which the course is charged. The currency is shown in the Course Details for each module session.

Cost	For non-token payment, enter the cost in the selected currency. For token payment, enter the number of tokens to charge for the course. For organizational one off token payments, enter the number of tokens to charge and click **Deduct Payment** to take the token payment from one or more organizations. The cost is shown in the Course Details for each module session.
Price Info	You can include any extra information about the course cost here for any of the charge procedures except Organization One Off Token Payment. The price information is shown in the Course Details for each module session.

Optional Payment Items

Optional payment items can represent generic categories of items, such as textbooks, starter packs or accommodation, and can be used for multiple courses.

You can specify the costs of optional payment items for learners to buy when they are buying a course. You can configure the cost of the items at the module or session level, so each session can have its own pricing. You can also specify the cost type of optional payment items, which determines how the cost of each is calculated.

Optional Payment Item Type	Description
Per Night of Course	This is calculated based on the total number of days that the course session spans minus one. For example, if a course session spans five days (that is, starts on Monday and ends on Friday), the computed duration for the payment item will be four.
Per Business Night	This is calculated based on the number of business nights that the course spans. It does not include Friday, Saturday, and Sunday nights or the last day of the course. For example, if a course session spans 14 calendar days (starts on a Tuesday, 1st September and ends Monday, 14th September), the computed duration for the payment item will be seven business nights.

Per Week of Course	This is calculated based on the number of weeks that the course spans. It does not take into account the fact that seven days equals one week. As long as the course spans on a week, the week is then counted.
Per Unit	This is calculated based on the number of units the participant buys.
% of Course Cost	The cost for this payment item is calculated based on a percentage in relation to the course cost.

Knowledge Center Settings

The table below lists the Knowledge Center settings that course administrators can configure in the Catalog Editor.

Setting	Description
Allow module launches in KC	Specifies whether the course can be launched from the Knowledge Center. This setting overrides the *Module Launches* option in System Configuration.
Course link always launches the KC instead of the course	If enabled, the course will be displayed with a *Launch* button on the Current Learning Modules page and Enrollments (Current Learning Format) widget instead of the *Knowledge Center* link. Clicking Launch opens the Knowledge Center. Note that if the System Configuration setting, *Module Link Launches Knowledge Center*, is enabled, this setting cannot be disabled in the Catalog Editor for individual modules.
AREA: Show assessment workflow area	Specifies whether the Assessment Workflow area is enabled. Learners and instructors can see and launch pre- and post-course assessments from this area of the Knowledge Center.
AREA: Show certification area	Specifies whether the Certification area is enabled. If there are any certifications assigned to the course, information about them is shown in this area of the Knowledge Center.
AREA: Show contact list area	Specifies whether the Contact Group Members area is enabled. In this area learners and instructors can view the profiles of other learners enrolled in the course, send them emails, or remove themselves from the contact list.
AREA: Show course summary area	This option has no effect. The course summary is always shown.
AREA: Show evaluation area	Specifies whether the Evaluation area is enabled.
AREA: Show forum area	Specifies whether the Forum area is enabled. This area enables learners and instructors to access the forum category or forum assigned to the course in Define Module Properties.
AREA: Show instructor list area	Specifies whether the Contact Group Members area is enabled. In this area learners can email the course instructor(s).

AREA: Show news area	Specifies whether the All News area is enabled. In this area learners and instructors can see news articles that have been configured to be shown in the Knowledge Center for the course.
AREA: Show notepad area	Specifies whether the Personal Notebook area is enabled. Learners and instructors can make personal notes for the course in a separate page and print them.
AREA: Show peer comments area	Specifies whether the Peer Comments area is enabled. Learners can rate the course (out of five stars) and leave a comment or review.
AREA: Show references area	Specifies whether the Reference Resources area is enabled. Learners and instructors can access references configured for the course from this area.
AREA: Show status change area	Specifies whether the action button to enable learners to change their enrollment status is shown. For example, when this area is enabled, if learners are allowed to withdraw their enrollment, the Withdraw Enrollment button is shown.
AREA: Show exam area	Specifies whether Exams assigned to the course are shown in the Reference Resources area.
AREA: Show About Me for the instructor	Specifies whether to enable the the link to the About Me information for each instructor in the Instructor Area.
AREA: Show reference share area for instructors	Specifies whether the list of references for instructors is shown in the Reference Resources area. Only instructors can see instructor resources.
AREA: Show file share area	Specifies whether the File Share area is enabled. Learners and instructors can upload files to share with each other in this area, including homework.
AREA: Show homework drop box	Specifies whether the Submitted Homework file list is enabled in the File Share area. When enabled, instructors can view submitted homework files.
AREA: Show marked/ reviewed homework	Specifies whether the Marked/reviewed Homework list is enabled in the File Share area. When enabled, learners can view their homework files that have been marked by the instructor.

AREA: Show transcript area	Specifies whether the Records/Transcript area is enabled. Learners view their current learning record for the course and access the transcript history in this area.
AREA: Show quick evaluation area	Specifies whether the Quick Evaluation area is enabled.
AREA: Show Module Attributes	Specifies whether module attributes are shown in the Overview area. Note that you must also check the Knowledge Center box in the Display Area Settings in the Module Attribute definition.
For Program Module, sort sub-modules by	Required/Elective: the sub-modules are shown in two separate sections, Required Modules and Elective Modules. Defined Order: the sub-modules are shown in one section, in the order defined in the session properties. This is the default setting.

Learning Module Enrollment Policy Properties

The table below describes the properties in the Define Enrollment Policy page in the Catalog Editor.

Property	Description
This module/program currently allows public access	Select this check box to allow public users (that is, users who are not logged into the LMS) to access this course.
Allow self-enrollment	Select this check box to allow learners to enroll in the course themselves.
Allow user to WITHDRAW	Select this check box to allow learners to withdraw their enrollments before starting the course.
Prompt user for reason for the withdrawal	If Allow user to WITHDRAW is selected, select this check box to prompt the learner for a reason for withdrawing their enrollment. To record the withdrawal and withdrawal reason in the learner's transcript record, the System Configuration options *Retain transcript records for user withdrawals or withdrawal equivalents* and *Record all withdrawals (except withdrawals performed using the group withdrawal function)* must be enabled.
Allow user to mark Completed (Self-Asserted)	Select this check box to allow participants to mark their enrollments as completed.
Allow status changes to be made at any time (e.g., ignore standard business rules)	Select this check box to allow learners to change their enrollment at any time. For example, it allows participants to withdraw from the course after starting it. You do not need to select this check box to enable administrators to change a participant's enrollment status in the Catalog Editor.

Allow session transfer	Select this check box to allow learners to transfer onto an alternative session, either by themselves or by a reviewer. A Session Transfer button is available for the transcript if:
	• The transcript status is *Not Started*, *In Process*, or *Session Selection Needed*
	• There are alternative sessions satisfying all of the following requirements:
	    • Status of *Active*, *Invitation only*, or *Prompt user to select session*
	    • Start Date that is in the future or not specified
	    • Current date within the Enrollment Period
	    • The number of participants is less than the maximum
	A reviewer with the *Session Transfer* and *Review Records/Transcript* Access Controls can also carry out Session Transfers regardless of this setting.

Disallow re-enrollment	Select this option to prevent learners from re-enrolling in the course when they have one or more previous enrollments with status *Completed*, *Completed Self-Asserted*, *Waiver/Exempt*, *Passed*, or *Failed*.
Allow re-enrollment after day(s)	Select this option to allow learners who have one or more previous enrollments with status *Completed*, *Completed Self-Asserted*, *Waiver/Exempt*, *Passed*, or *Failed* to re-enroll or be re-enrolled after a number of days you specify.
Select organization constraints	Use this property to restrict access to the module to specific organizations. Click to select the organizations that are allowed access to this module. Leave this box blank to allow all organizations to access it.
Assign user constraint(s)	Use this property to restrict access to the module to specific users. Click to select the users that are allowed access to this module.

Remove assigned user(s)	Click to remove the selected user from the list of users that are allowed access to this module.
Policy Name	Click the **browse** icon to select a different enrollment policy from the default, if required. Click the **trashcan** icon to revert to the Default Policy.
Organization / User Group	Use these options to specify different enrollment policies for members of individual organizations and user groups, which take precedence over the enrollment policy selected for the course in the Policy Name field. Click the **browse** icons to select the organization or user group and the enrollment policy to assign to members of it for this learning module. Click **Add organization policy** and **User Group Policy** to add different policies for different organizations and user groups.
Allow a configured organization enrollment policy to take precedence over this course policy	If you added an enrollment policy for members of an organization, you can check the box to ensure that an enrollment policy that has been specified (in **Manage Center > Users > Organization Maintenance**) for the learner's organization takes precedence.
Apply Enrollment Policy when transferring from a "Prompt User to Select Session" session	Select this check box to apply the Enrollment Policy if the learners are transferred from a *Prompt User to Select Session* session.
Allow reopen	Select this check box to allow learners to re-open the course and download resources after they have completed it. Learners do not gain additional credit for completing the course again.

Email Preferences

Email Preferences can be configured at both the learning module and individual session level, where session-specific preferences take precedence over module level email preferences. The following table describes the events for which you can select an email template in the Email Preferences Setup properties for a module or session. For some events you can configure additional options, such as frequency and the number of days before or after the event to send the email. The email recipients are specified in the email templates.

These email preferences apply only to classroom or virtual classroom courses.

Event	Description
Confirm enrollment	Select a customized email to be sent as a part of the workflow associated with a confirmed enrollment. This email is sent instead of the default generic confirmation email.
Module not yet accessed reminder	Configure an email to be sent whenever a learner has been enrolled in a course but has not yet started it.
Gentle completion reminder	Configure a gentle completion reminder message for learners who have not yet completed an assigned course. The initial email is sent based on the enrollment date of the course, and the selected email template should indicate to the learner a specific deadline, if one applies.
Escalation of completion reminder	Configure an escalated completion reminder message for learners who have not yet completed an assigned course. The initial email is sent based on the enrollment date of the course, and the selected email template should indicate to the user a specific deadline, if one applies.
Gentle deadline reminder	Configure a gentle deadline reminder message for users who have not yet completed an assigned course. The initial email is sent based on the impending deadline date of the course.
Session waiting reminder	While the number of enrolled people is below the minimum class size, an email will be sent to those who register explaining that more enrollments are required before the course is confirmed. Once the minimum class size is reached, the enrolled users will be sent a confirmation email. If the minimum class size is not reached by the enrollment deadline, the class will be cancelled and the enrolled users will receive a cancellation notification.

Start of session reminder	Select an email to be sent a number of days before the class starts.
Session completion notification	Select an email to be sent to learners when they have completed a session (that is, when the status is set to *Completed*).
Session finish notification	Select an email to be sent to learners a number of days after the session is marked as completed (or for a classroom session, after the end date).
Enroll user in waitlist	Select an email to be sent if a learner on the waitlist is enrolled when someone else withdraws
Coupon distribution notification	Select an email to be sent when the course coupon is assigned to a reseller. The email will be sent to the reseller in addition to the recipients that are targeted in the selected email template.
Dropped from waitlist notification	Select an email to be sent when a user drops from the waitlist (that is, their status changes from *Waitlist* to *Dropped*). Note that you cannot use this for learning programs.
Task Complete Reminder	Select an email to be sent to the users who can mark a Task learning module as completed.
Submitted homework notification	Select an email to be sent (typically to the instructor) whenever a participant uploads a file to the Submitted Homework file share area in the Knowledge Center.
Marked/reviewed homework notification	Select an email to be sent (typically to the participant) whenever an instructor uploads a marked/reviewed homework file to the Marked/Reviewed Homework file share area in the Knowledge Center.
Session fail notification	Select an email to be sent to learners who have failed an assigned course.
No-show notification	Select an email to be sent if a participant does not attend a classroom session (that is, when the instructor or administrator update's the participant's status to *No Show*).

Post-session reminder for instructors/ administrators	Configure a reminder message to be sent to the instructor or a named administrator to remind them to log participant attendance and completion of the session. The recipients are defined in the email template. The following recipients are supported: • Course specific instructors • Default system approver • Default system administrator • Specific user • External email The initial email is based on the session end date. For a frequency other than Once, the reminder will be sent as long as there are participants with open transcripts (that is, not in a final state, such as Completed).

Launch Interface Properties

This page describes the properties for the default set of launch interfaces in the LMS.

Resource

This is the recommended Launch Interface setting for most courses, including SCORM and AICC courses. It is the default setting for courses imported using any of the Import Content Package, Import AICC Course Structure or Import Resource wizards.

This launch interface supports any of the following content types, provided the Run-time Environment is configured appropriately:

- Generic web content that does not support a specific communication or tracking mechanism such as AICC HACP or the SCORM JavaScript API.
- Courses that use the SCORM 1.2 or SCORM 2004 communication and tracking mechanism (the JavaScript API).
- Courses that use either of the AICC communication and tracking mechanisms, that is, the HTTP AICC CMI Protocol (HACP) or the JavaScript API.
- Courses created from exams.

Table: Resource Launch Properties

Property	Description
Attempts Allowed	Select the number of attempts a learner can have to achieve a passing score and complete the course. You can select 1 to 10, or unlimited attempts. For a given learner's enrollment, the number of attempts allowed will be number set at the time of enrollment. This number can be reset for the learner upon publishing new revisions or by explicitly granting additional attempts. The number of attempts taken and the number allowed are shown in Current Learning Modules and the Knowledge CenterCourse Details.

Course Scoring Method	If the learner is allowed more than one attempt to complete the course with a passing score, select the course scoring method. You can select their highest, average, first or last score. The scoring method applies only to courses, not to exams. It is captured for a transcript during enrollment and may only be reset upon publishing new revisions. While the resulting score will be displayed on a transcript, it will not affect the overall status of the transcript.
Course should be completed	Select whether the learner's transcript status for the course is updated to *Completed* automatically when the learner completes the course with a passing score, or whether the learner must manually mark the course as completed. Allowing the learner to mark the course as completed means they can try to improve on a previously successful attempt. The course completion method will be captured for a transcript during enrollment and may only be reset upon publishing new revisions.
Run-Time Environment	Select the run-time environment to specify how the LMS communicates with the resource.
Web Address or Embedded Content	Enter the URL of the course launch page. It can be a relative or absolute path, and can contain parameters. Alternatively, click **Select** to open the Repository Manager, where you can select a file.
Exam ID	If the resource is an exam, click the **browse** icon to select the exam. This option is enabled only when the Run-Time Environment is set to *This resource is an exam created using the exam editor.*
Optional Properties	Enter or select the optional properties supported by the resource.
Download	Check or select the options to enable mobile devices to download the resource.

Rustici Engine

You can migrate courses that use the native LMS SCORM engine to Rustici Engine. Only to SCORM, AICC and xAPI courses imported via the Import Content Package page can be migrated. It is not possible to migrate courses from Rustici Engine back to the native LMS SCORM engine.

For more information about importing and migrating courses and revisions to Rustici Engine, seeImport or Migrate a Course to Rustici Engine.

Adobe Connect

Adobe Connect is a web conferencing and real-time collaboration software. You can use Adobe Connect for virtual classroom based courses. Your organization must have an Adobe Connect account, set up (see Create and Manage Virtual Classroom Accounts). The LMS supports Adobe Connect Learning (Live Virtual Classrooms) and Adobe Connect Meetings Licenses.

Table: Adobe Connect Launch Properties

Property	Description
Adobe Account	Select the Adobe Connect account for the virtual classroom module.
Password	Enter the password for the Adobe Connect account.
Launch URL	Enter the URL of the course launch page. It can be a relative or absolute path, and can contain parameters.

AICC Assignable Unit

This interface is for courses that support the HTTP AICC CMI Protocol (HACP) for communication and tracking.

> ⓘ This is a legacy interface, provided mainly for backward-compatibility. For new courses, PeopleFluent recommends using the *Resource* launch interface with the Run-time Environment set to *This resource communicates using an HTTP-based protocol (appropriate for courses that support the AICC HACP Binding).*

Table: AICC Assignable Unit Launch Properties

Property	Description

Attempts Allowed	Select the number of attempts a learner can have to achieve a passing score and complete the course. You can select 1 to 10, or unlimited attempts. For a given learner's enrollment, the number of attempts allowed will be number set at the time of enrollment. This number can be reset for the learner upon publishing new revisions or by explicitly granting additional attempts. The number of attempts taken and the number allowed are shown in Current Learning Modules and the Knowledge CenterCourse Details.
Course Scoring Method	If the learner is allowed more than one attempt to complete the course with a passing score, select the course scoring method. You can select their highest, average, first or last score. The scoring method applies only to courses, not to exams. It is captured for a transcript during enrollment and may only be reset upon publishing new revisions. While the resulting score will be displayed on a transcript, it will not affect the overall status of the transcript.
Course should be completed	Select whether the learner's transcript status for the course is updated to *Completed* automatically when the learner completes the course with a passing score, or whether the learner must manually mark the course as completed. Allowing the learner to mark the course as completed means they can try to improve on a previously successful attempt. The course completion method will be captured for a transcript during enrollment and may only be reset upon publishing new revisions.
Web Address or Embedded Content	Enter the URL of the course launch page. It can be a relative or absolute path, and can contain parameters.
Core Vendor and Optional Data	These properties are for optional AICC data sent to the course in response to a GetParam request. Only set these options if you have a specific need for your course.

Email Launcher

This interface sends an email to the learner, which contains the information they need to launch the course.

Table: Email Launcher Properties

Property	Description
E-mail Message Name	Select the email template to use for the email.
Subject/message read only for learner	Check this box to ensure the email subject and message content are read-only for the learner.

Generic Web Launch

This is a legacy interface for courses that do not support a specific communication/tracking mechanism.

> This is a legacy interface, provided mainly for backward-compatibility. For new courses, PeopleFluent recommends using the *Resource* launch interface with the Run-time Environment set to *This resource has no built-in support for run-time communication.*

Table: Generic Web Launch Properties

Property	Description
Allow direct launch	Check this box to enable learners to launch the course directly from the catalog Course Details. This bypasses enrollment processing and does not update the learner's transcript.
Web Address or Embedded Content	Enter the URL of the launch page when the participant starts this learning module**.** Valid HTTP(S) addresses can include parameters (for example: nd/fresco/courses/page1.html?UID=userabc).

getAbstract Proxied Authentication

This is used to create an Online Module that provides direct access to the getAbstract service for business book summaries. In order to use this launch interface, your organization must have an account with getAbstract.

Table: getAbstract Proxied Authentication Launcher Properties

Property	Description
"U"Value	Enter the value provided by getAbstract for your account.

Global English

This interface is used to create an online course that provides direct access to the GlobalEnglish service for online English instruction. In order to use this launch interface, your organization must have an account with GlobalEnglish.

Table: getAbstract Proxied Authentication Launcher Properties

Property	Description
Keycode	Enter the value provided by GlobalEnglish for your account.

NETg Cookie-based Tracking

This is a legacy interface for NETg courses that support NETg's proprietary cookie-based tracking mechanism.

> This interface is provided mainly for backward-compatibility. The latest NETg course players support SCORM and AICC communication and tracking, so PeopleFluent recommends that customers use the SCORM or AICC versions, and use the Import Content Package or Import AICC Course Structure wizard respectively to import the courses.

Table: NETg Cookie-based Tracking Launcher Properties

Property	Description
Web Address or Embedded Content	Enter the URL of the course launch page. It can be a relative or absolute path, and can contain parameters. Alternatively, click **Select** to open the Repository Manager, where you can select a file.
Passing score by URL parameters?	Select whether to pass the score in the URL parameters. Usually this is set to No for NETg courses.

Location of the script file	Select whether the location of the script file is the same as the starting page (applicable to version 1 and SimBuilder 01) or a level up from the starting page (applicable to SkillBuilder and SkillBuilder DX).

NETg Learning Proxied Authentication

This interface is used to create an Online Module that provides direct access to the O'Reilly Safari Books Online e-reference library. To use this, your organization must have an account with Safari Books Online.

Table: NETg Learning Proxied Authentication Launcher Properties

Property	Description
Public Key	Enter the public key provided by O'Reilly.
Private Key	Enter the private key provided by O'Reilly.
Destination	Select the Safari Books destination from the drop-down list.

Safari MD5 Login Authentication

This interface is used to create an Online Module that provides direct access to O'Reilly Safari books. To use this, your organization must have an account with Safari Books Online.

Enter or select the properties based on consultation with Safari bookstore.

Skillsoft Net Download

The Skillsoft Net Download interface is used for Skillsoft courses and allows learners to download the courses and play them offline using the Skillsoft Course Manager (SCM) desktop application.

Table: Skillsoft Net Download Launcher Properties

Property	Description
Web Address	Enter the URL for the folder where your Skillsoft courses are installed.The Address is used by the Skillsoft Course Manager to locate the Skillsoft courses on the web server, so it can launch them. This can be a relative or absolute URL, up to the *player* folder in your Skillsoft install path.
Course Type	Select the course type.

Time Tracking HTML

This interface is used for courses that do not support a specific communication or tracking mechanism, where you need the LMS to record the time that the learner spent viewing the course. The LMS displays a timer that gives the learner immediate feedback on how long they have spent in the course.

> This is a legacy interface, provided mainly for backward-compatibility. For new courses, PeopleFluent recommends using the *Resource* launch interface with the Run-time Environment set to *This resource has no built-in support for run-time communication*. The LMS automatically records the time when the learner indicates that the course is completed when they click the *Mark As Completed* button.

Session Properties

The tables below describe the session properties which you may need to configure for various learning types. Related session properties are grouped under a descriptive heading.

The properties you see depend on the learning type of the module.

Required Event Attributes

Property	Description
Session Title	Enter a session title for this instance of the course. The title is shown in the Course Details and could indicate something unique or descriptive about the session, such as the term or semester and year (although the session dates are also listed in the Course Details).
Session Code	This defaults to the template format defined in the *Session Code Generator Format* System Configuration setting. Using this setting enables you to create sessions with codes of a standard format, with a static prefix. For example, SESSION-0000, where 0000 is the next available unique four-digit number. This is a mandatory field.
Description	Enter a description for the session. This is shown in the Course Details.

Event Status	When you create a new session, the Event Status defaults to the status selected in the *Default Event/Session Status on Session Creation* System Configuration setting. You can change the default Event Status. Other event statuses are: • *Active*—The session is available for enrollment as soon as it is saved. • *Pending*—Use this status when you are preparing a session which is not yet available for enrollment. • *Completed*—The session has finished. • *Closed*—The session is no longer available for enrollment. • *Cancelled*—The session was scheduled but has been cancelled. • *Invitation Only*—Learners can not self-enroll in the session and must be enrolled by an administrator. • *Prompt User to Select Session*—Use this status if the session is used as a placeholder for assigning a course to learners. After it has been assigned, learners and reviewers can select an *Active* session. • *Retired*—The course has been retired and any currently enrolled online session can no longer be launched. • *Ended*—The session is no longer available for self-enrollment. Classroom training sessions can be configured to automatically switch to this status once their end date has passed. For more information about setting the Event Status, and additional options for prompting the user to select a session, see Guidelines for Setting the Event Status.
User(s) who is/are allowed to select the session	When the Event Status is set to *Prompt User to Select Session*, you can choose whether that can be the participant, the reviewer or both.

Make "Prompt user to select session" available for self-enrollment	This property is available when the Event Status is set to *Prompt User to Select Session*. If checked, a placeholder session will be available for enrollment by learners or by reviewers on their behalf. The session will also be shown in the catalog for self-enrollment.
Show session selection reminder	This property is available when the Event Status is set to *Prompt User to Select Session*. If checked, the LMS will show a session selection reminder to the participant at each login.
Change transcript status of enrolled users correspondingly, for changing the event status to Completed, Cancelled or Retired or changing from Prompt User to Select Session to another status	If this check box is selected, the status on the transcripts of the enrolled learners are updated according to changes in event status.
Delivery Language	Sessions can be delivered in a specific language you select from the list. For learning modules with more than one session, such as classroom-based courses available in different locations, you can define the learning module as multi-language and specify the delivery language for each session. The languages available are determined by the languages purchased by your organization.
Select organization constraint(s)	Leave this box blank to make the session visible to all organizations, or click this field name to select the organizations whose members can see the session in the Catalog Browser and Catalog Search results.
Instructor Contact Email	The instructor's contact email address. This takes precedence over an email address specified in the instructor's profile.
Course Specific Approver #1/#2	For enrollment policy steps that require a course session-specific approver, you can select an individual here to whom the enrollment approval request will be sent.
Comments	You can add comments about the session in this box.

Enrollment Limits	You can specify the minimum and maximum number of enrollments for the session. The maximum can be based on the capacity of the training facility, which is defined in the # of Seats field in the Facilities page. For more information about basing enrollment limits on the training facility, see Enrollment Limits Based on Facility.
Reserve seats for learner enrollments pending approval	If checked, Learners with a Pending Approval status will have a seat reserved at the time of enrollment as long as the limits have not been reached according to the first come, first served logic. To check this box by default for all sessions, check the *Default Reserve seats for learner enrollments pending approval* System Configuration setting.
Total Enrollment #	Shows the total number of enrollments in the session.
Cannot withdraw/ transfer within	You can specify the number of days before the starting date of the session up to which enrolled learners can withdraw their enrollment. Once within this number of days before the start date, they cannot withdraw. You can use this setting to give waitlisted learners who are automatically upgraded enough time to prepare for the session.
Waitlist Handling	Select one of the following options: • Automatic Upgrade • Manual (Administrator) Upgrade • Waitlist all learners • No waitlist For more information, see About Waitlist Handling.

Dropped from waitlist handling: Transfer users dropped from waitlist to the following session	Check this box to transfer learners with a Dropped from Waitlist status to the session selected from the drop-down list during manual or automatic waitlist clean-up tasks. Note that the selected session must have one of the following event statuses: • Active • Pending • Invitation Only • Prompt User to Select Session
Credits	Specify the credits for the session.
Institution	Specify the institution that provides the training.
Enrollment Begin Date and Enrollment Deadline	To specify a window of time during which learners can enroll in the session, select the begin and deadline dates and times.
Due Date of Homework	Specify the due date for homework handed out in the session.

Module Completion Deadlines

Property	Description

On enrollment, calculate deadline as follows	Select an option to calculate the deadline to complete the session: • No deadline, these will be set manually per learner if necessary. • [Value] Days from Enrollment (0 implies unlimited)—Specify the number of days from the enrollment allowed to complete the module. • Date Specific Deadline—Specify the module completion deadline. New deadline settings must be explicitly applied to the selected learners in order for the new deadline to be reflected in their transcripts.
Once the deadline against a transcript has passed	Select an option: • Do nothing, the deadline was just for reference. • Set transcript to *Deadline Expired* and block learner from launching the course. • Block learner from launching other courses until they complete this course.
View Participant Deadlines	View the list of participant status and deadlines. Participant deadlines are calculated on enrollment, thus changing the deadline alone will not affect the deadlines for existing course participants. A change in the course completion deadlines can be applied to learner transcripts with the following statuses: • Waitlisted • Not Started • In Process • Pending Approval

Collaboration Tools

Property	Description
Forum	Link a Forum Category or Single Forum to the session so that the learners and instructors can access the session level forum or category through the Knowledge Center.

Additional Session Attributes

Assign values to any configured session attributes.

Workflow Assignments

Property	Description
Select a workflow template	Assign a workflow template to the session. Workflow Templates are defined in the Assessment Workflow Manager.
Disable workflow assignment for this session	If selected, all workflow will be ignored for the enrollment of this session. When a learner enrolls in the course, the LMS looks for the correct workflow for the enrollment and assigns the exam or evaluation in the workflow to them. It will be accessible to learners from the Overview and Assessment Workflow in the Knowledge Center.

Guidelines for Setting the Event Status

When the LMS presents course schedule options to learners, the event status is used to determine which sessions to show the user.

The event status is specific to the session and is independent of the final overall status recorded in the participant's training history record. However, changing the event status for a session in which learners are currently enrolled may affect their training record status.

Group enrollment allows you to override the business logic restrictions of a specific status as long as the *Override?* check box is selected on the Group Enrollment page.

> Changing the event status of single-session modules (that is, online equivalent learning types) to Completed, Retired or Cancelled automatically clears the module's *Visibility: Show in Catalog* check box so the session will no longer be shown in the course catalog or catalog search.
>
> If the *Change transcript status of enrolled users correspondingly* setting is enabled, the overall status for learners enrolled in the session will be changed correspondingly.
>
> If the *Change transcript status of enrolled users correspondingly* setting is disabled, only the course status and visibility in the catalog will be changed. Enrolled learners' overall status for the session will not be changed.

About the *Prompt User to Select Session* Event Status

This event status is intended especially for classroom modules so that a session can be used as a placeholder to enable a course to be assigned to a user, even if it is not yet clear which actual session the user will attend. It requires the participant or reviewer to select the specific session from among the *Active* sessions for the course. You can specify who can select the session when configuring the *Prompt User to Select Session* properties. It can be participant only, reviewer only or both participant and reviewer. If the *Show session selection reminder* check box is selected, the LMS shows a session selection reminder to the participant each time they login.

This event status works with group enroll and auto-enroll targets. The default setting doesn't allow a user to self-enroll into in a classroom session with this status, although a program session containing such a class can be self-enrolled. If the *Make "Prompt user to select session" available for self-enrollment* check box is selected, the session is also shown in the catalog for self-enrollment.

When used with a program session, you can create a placeholder session for assignment that avoids the inconvenience of setting up a number of program sessions with a different classroom dates.

Other session properties, such as start date or venue, are irrelevant for an event with this status, as they are never used.

Session Module Assignment Field Reference

General Session Properties

Property	Description
Title	This is the program session ID that was entered on creation of this session. The title is shown in the Course Details and could indicate something unique or descriptive about the session, such as the term or semester and year (although the session dates are also listed in the Course Details).
Description	Enter a description for the session. This is shown in the Course Details.

Event Status	When you create a new session, the Event Status defaults to the status selected in the *Default Event/Session Status on Session Creation* System Configuration setting. You can change the default Event Status. The event status is specific to the session and is independent of the final overall status recorded in the participant's training history record. However, changing the event status for a session in which learners are currently enrolled may affect their training record status. You can override the business logic restrictions of a specific status by selecting the **Override?** checkbox on the check box on the **Group Enrollment** page. Other event statuses are: • *Active*—The session is available for enrollment as soon as it is saved. • *Pending*—Use this status when you are preparing a session which is not yet available for enrollment. • *Completed*—The session has finished. • *Closed*—The session is no longer available for enrollment. • *Cancelled*—The session was scheduled but has been cancelled. • *Invitation Only*—Learners can not self-enroll in the session and must be enrolled by an administrator. • *Prompt User to Select a Session (Classroom Learning Type)* - Please see additional information below. • *Retired*—The course has been retired and any currently enrolled online session can no longer be launched.

	About the Prompt User to Select a Session Status This status allows the session to be used as a placeholder to assign the course to a user, even if it is not yet clear which session the user will attend. You can specify which users (participants, reviewers or both) are able to select the session. By default, the LMS does not allow a user to self-enroll in a session with this status. Click the *Make "Prompt user to select session" available* setting to enable this. If the *Show session selection reminder* check box is selected, the LMS shows a session selection reminder to the participant each time they login. When used with a program session, you can create a placeholder session for assignment that avoids the inconvenience of setting up a number of program sessions with a different classroom dates.
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	If this check box is selected, the status on the transcripts of the enrolled learners are updated according to changes in event status. If disabled, only the course status and visibility in the catalog will be changed. Enrolled learners' overall status for the session will not be changed.
Delivery Language	Sessions can be delivered in a specific language you select from the list. For learning modules with more than one session, such as classroom-based courses available in different locations, you can define the learning module as multi-language and specify the delivery language for each session. The languages available are determined by the languages purchased by your organization.
Time Zone	You can select the time zone in which the session takes place.
Start Date and End Date	You can specify the start date and time and end date and time for the session.

Enrollment Begin Date and Enrollment Deadline	To specify a window of time during which learners can enroll in the session, select the begin and deadline dates and times.
Enrollment Limits	Enter the minimum number of enrollees in the **Min:** field and/or the maximum number of enrollees in the **Max:** field. **Note**: The maximum can be based on the capacity of the training facility, which is defined in the # of Seats field in the Facilities page.
Reserve seats for learner enrollments pending approval	Click the checkbox to allow learners with pending approval status to reserve a seat in the class.
Cannot withdraw/ transfer within	Enter the number of days before the start up to which users can withdraw from the session.
Waitlist Handling	Make a selection from the drop-down options: • **Automatic Upgrade** - When all available seats are taken, additional enrollment requests are waitlisted. When a seat becomes available, the system enrolls the waitlisted users in order of enrollment. • **Manual (Administrator) Upgrade** - When all available seats are taken, additional enrollment requests are waitlisted. Subsequent requests are waitlisted until the list is emptied by ad administrator and a seat becomes available again. • **Waitlist all learners** - All enrollment requests are waitlisted, regardless of maximum seats setting. • **No waitlist** - The maximum seats setting has no effect. • **Manual (Administrator) Upgrade without Reserving Seats** - Upgrade without reserving seats.
Transfer users dropped from waitlist to the following session	Click the checkbox to automatically assign users who have been dropped from the waitlist to another session. Select a session in the drop-down field below the checkbox.
Credits	Specify the credits for the session.

For program modules with payment configured, enforce payment before first launch	Select this check box to take payment for the learning module before it is launched for the first time.

Module Completion Deadlines

Property	Description
On enrollment, calculate deadline as follows	Select an option to calculate the deadline to complete the learning modules in the program session: • *No deadline, these will be set manually per learner if necessary.* • *[Value] Days from Enrollment (0 implies unlimited)*—Specify the number of days from the enrollment allowed to complete the program session. • *Date Specific Deadline*—Specify the program session completion deadline. New deadline settings must be explicitly applied to the selected learners in order for the new deadline to be reflected in their transcripts.
Once the deadline against a transcript has passed	Select an option: • Do nothing, the deadline was just for reference. • Set transcript to *Deadline Expired* and block learner from launching the course. • Block learner from launching other courses until they complete this course.

View Participant Deadlines	Click this link to view the list of participant status and deadlines. Participant deadlines are calculated on enrollment, thus changing the deadline alone will not affect the deadlines for existing course participants. A change in the course completion deadlines can be applied to learner transcripts with the following statuses: • Waitlisted • Not Started • In Process • Pending Approval

Session Module Assignment

This section lists the learning modules (including other programs) that have been associated with this program. You can remove an association from the learning module's Associated Programs page.

Property	Description
Modules cannot be accessed until all preceding modules are completed	Select this check box to enforce the the completion of the assigned learning modules in the order specified. Before a learner can start the next module, their transcript status for the preceding learning module must be any one of: • Completed • Completed (Self-asserted) • Waiver/Exempt • Passed
Allow learner to advance to next order on failing preceding learning	This option is available only when the check box above is selected. You can select this check box to allow learners to advance to the next learning module if they fail the preceding module.

Hide modules blocked by preceding modules in Learner's Available Modules	This option is available only when the *Modules cannot be accessed until all preceding modules are completed* option is selected, and takes into account both options above. Select this check box to hide learning modules from the learner until they have either completed the preceding learning module (or failed it, if the option above is selected).
Program completion requires modules to be on Effective/ Approved revision	Select this check box if learners are required to complete the current effective or approved revision of each learning module in the program.
Modules cannot be accessed until their prerequisites are fulfilled	Select this check box to bypass prerequisite checking for assigned modules during enrollment. The learning module prerequisites will be checked when the learner launches the course.
Required Credits for Elective Modules	Enter the number credits the learners need to earn to enroll in elective learning modules in the program.
Use predefined credits	Select this option to award to the participant on completion of the learning module the credits defined in the module's session properties.
Use credits defined below	Select this option to specify the number of credits to award to participants on completion of the assigned learning modules. You can specify the number of credits for each module individually. This option takes precedence over the number of credits defined in the learning module's session properties.
Passing Score	You can enter a minimum score for passing the program. If you enter a score, learners will fail the program if they do not achieve the passing score. Leave the the passing score set to 0 disable it.
If a learner reaches a FAILED or DEADLINE EXPIRED status for a sub-module:	
Allow learner to re-enroll on the module within the context of this program	Enrollment checks like approvals, prerequisites and waitlisting may still apply when the learner re-enrolls.

Do not allow the learner to re-enroll on the module within the context of this program	Select this option to block learners from re-enrolling in a learning module via the program if their status for it reaches *Failed* or *Deadline Expired*.
Automatically fail this program for the learner if mandatory modules or elective credits requirement can no longer be met	This option is available if the option *Do not allow the learner to re-enroll on the module within the context of this program* is selected.
Apply Policy Approval for Non-auto enroll Program Modules	Select this check box to enforce the enrollment policy approval workflow configured for the learning module if learners are not auto-enrolled.

Collaboration Tools

Property	Description
Forum	Link a Forum Category or Single Forum to the program session so that the learners and instructors can access the session level forum / category through the Knowledge CenterCourse Details.

Additional Session Attributes

Assign values to any configured session attributes.

Workflow Assignments

Property	Description
Select a workflow template	Assign a workflow template to the program session. Workflow Templates are defined in the Assessment Workflow Manager.
Disable workflow assignment for this session	If checked, all workflow will be ignored for the enrollment of this program session. When a learner enrolls in the program session, the LMS looks for the correct workflow for the enrollment and assigns the exam or evaluation in the workflow to them. It will be accessible to learners from the Overview and Assessment Workflow in the Knowledge CenterCourse Details.

Cost Information Field Reference

Cost/Enrollment Information

Property	Description
Charge Procedure	Select from the drop-down list how the course cost is registered and charged. Select **Charged per Registration** to register a charge each time a participant enrolls in the course. The cost is registered in the Accounts tab in the participant's profile. You cannot add optional payment items to this type of charge. Select **Online Payment** to enable the participant to make the payment via an online payment gateway or with tokens. Online payments can be configured to accept tokens or currency, and enable you to charge for optional payment items. Select **Organization One Off Token Payment** to charge a one-off amount for an entire module and debit this amount from the organization's token account instead of charging per individual learner enrollment. For sessions, you can choose to use the setting configured at the module level or select a different procedure.
Charged Cost Center	For non-token payment, you can enter the name of a cost center to associate the charge with. If you enter a cost center, it overrides the cost center defined for the learner (if applicable) in the User Editor. Otherwise, leave this field blank to use the learner's cost center. If the *Show additional enrollment information in records/ transcript* System Configration setting is enabled, the Charged Cost Center is shown in the Knowledge Center > Records/ Transcript area Course Details.
Currency	For non-token payment, select from the drop-down list the currency in which the course is charged. The currency is shown in the Course Details for each module session.

Cost	For non-token payment, enter the cost in the selected currency. For token payment, enter the number of tokens to charge for the course. For organizational one off token payments, enter the number of tokens to charge and click **Deduct Payment** to take the token payment from one or more organizations. The cost is shown in the Course Details for each module session.
Price Info	You can include any extra information about the course cost here for any of the charge procedures except Organization One Off Token Payment. The price information is shown in the Course Details for each module session.

Optional Payment Items

Optional payment items can represent generic categories of items, such as textbooks, starter packs or accommodation, and can be used for multiple courses.

You can specify the costs of optional payment items for learners to buy when they are buying a course. You can configure the cost of the items at the module or session level, so each session can have its own pricing. You can also specify the cost type of optional payment items, which determines how the cost of each is calculated.

Optional Payment Item Type	Description
Per Night of Course	This is calculated based on the total number of days that the course session spans minus one. For example, if a course session spans five days (that is, starts on Monday and ends on Friday), the computed duration for the payment item will be four.
Per Business Night	This is calculated based on the number of business nights that the course spans. It does not include Friday, Saturday, and Sunday nights or the last day of the course. For example, if a course session spans 14 calendar days (starts on a Tuesday, 1st September and ends Monday, 14th September), the computed duration for the payment item will be seven business nights.

Per Week of Course	This is calculated based on the number of weeks that the course spans. It does not take into account the fact that seven days equals one week. As long as the course spans on a week, the week is then counted.
Per Unit	This is calculated based on the number of units the participant buys.
% of Course Cost	The cost for this payment item is calculated based on a percentage in relation to the course cost.

About Session Security

Different sessions belonging to the same learning module can be managed by different LMS administrators, who may be responsible for different geographic regions, for example. You can, therefore, configure permissions for individual sessions in addition to the access permissions for the learning module.

There are three levels of access to LMS objects that apply to both modules and sessions:

- Unrestricted
- Read only
- No access

It is important to remember that access to sessions depends on the level of access provided to their corresponding learning module. If a less restrictive level of access is provided to the learning module, it takes precedence over a more restrictive access permission specified for the session. This is illustrated in the table below.

Table: Resulting session permissions

		Module Permissions		
		Unrestricted	Read-only	No Access
Session Permissions	Unrestricted	Unrestricted	Unrestricted	Unrestricted
	Read-only	Unrestricted	Read-only	Read-only
	No Access	Unrestricted	Read-only	No Access

Session permissions are applied to the following areas of the LMS:

- Catalog Editor
- Data Loaders
- APIs
- Module and Session Selectors
- Reports and the Report Wizard
- Group Enroll
- Teach Review
- Checklist Item Management
- Auto Exception Management
- Question Pool Editor

Administrators with no access to an active session can access its properties from the Active Courses tab on the Teach page.

Composite Programs

Composite programs are program learning modules that contain other programs. You create composite programs by assigning one or more programs to a program module (in addition to any other learning modules required).

The following restrictions apply when assigning programs to another program:

- Only programs with an active session can be assigned. Programs that do not have at least one session with an *Active* status are not available when assigning learning modules to a program.
- Programs containing the current program cannot be selected (cyclical dependency is not allowed).
- A program cannot be assigned to itself.

Enrollment Approval for Composite Programs

Enrollment approval for composite programs is determined by the parent program. For example, program *P0* contains another program *P1.* If *P0* does not require approval for enrollment, but *P1* does, a learner can enroll in *P0*—and therefore also *P1* and its constituent modules—without approval.

If composite module *P0* requires enrollment approval but its constituent program, *P1*, does not, learners can still enroll in program *P1* without approval.

Enrollment into a composite program can fail if:

- The composite program includes one or more programs in which the learner is already enrolled in a different session.
- The composite program has been configured in such a way that the LMS is unable to calculate a cost.

Waitlist Handling in Composite Programs

Enrollment in a composite program will be put into waiting list if any of the learning modules assigned to the composite program tree are full. Enrollment will only be triggered when someone withdraws from the composite program. Waitlist enrollment processing is based on the chronological order in which learners' enrollments are waitlisted, and is triggered automatically only if the Waitlist Handling property for the program session is set to *Automatic Upgrade*. Otherwise an administrator may handle waitlist enrollments.

Share/credit Enrollment in Composite Programs

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

In composite programs, whether or not a sub-program must be retaken will depend on the settings of the immediate parent program.

Program	Sub-module or program	Share/credit Enrollment Setting
Program 1	Module 1, Module 2	Requires the learner to retake the learning.
Program 2	Program 1, Module 3	Does not require the learner to retake the learning.

For example:

1. Learner enrolls in Program 1 and completes Modules 1 and 2 to complete Program 1.
2. Learner then enrolls in Program 2, which does not require the learner to retake any completed courses, therefore they only need to complete Module 3 to complete Program 2.
3. Learner re-enrolls in Program 1, which requires the learner to retake completed courses, so even though they have completed Module 1 and 2 before, they must complete them again.

Course CSV Loader Field Reference

Use the reference tables below to help you correctly format the learning module, session and class data you want to import via the Course CSV Loader.

Setting Custom Attribute Values

To assign values to custom module or session attributes, add the name of the attribute to the end of the heading row, prefixed with `MA-` or `SA-` respectively. For example, `"SA-My Custom Session Attribute"`.

Depending on the attribute type, the loader requires attribute values to be formatted as follows.

Table: Attribute Types

Attribute Type	Required Format
Free text	Any character or string enclosed in double quotes. Maximum length is 2,000 characters.
Text area	Any character or string enclosed in double quotes. Can include HTML markup. Maximum length is 2,000 characters, including any markup.
Drop-down	The code of one of the module attribute values defined for the drop-down.
Numeric	A number, which can include a decimal point (for example, `48.72`).
Check box	Y or `N`.
Date	Must be in the format *yyyy-MM-dd HH:mm:ss (for example*, `2020-08-25 13:00:00` denotes August 25, 2020, 1:00 p.m.).

Table: Course CSV Loader field reference

Field	Content	Data Handling	Default
Action	Control Action (Either Add, Delete or Update)	Must be "A", "D", "U", or "AU" (Add, Delete, Update, Add or Update as appropriate)	None
ModuleID	Module ID	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 85 characters)	None

ModuleLearningType	Learning Type	Must be one of: • A - Audio Cassette • B - Book • D - CD ROM • R - Classroom • 4 - Coaching • M - Exam • X - External Certification • Q - Just-In-Time Learning • O - Online • J - On-the-Job Training • 1 - Self-Training (Paper) • 2 - Self-Training (Video) • 3 - Special Interest Group • T - Task • I - Video • V - Virtual Classroom • U - Virtual Classroom (Archived) • W - Workshop/Seminar (maximum 1 character)	None
ModuleTitle	Course Title	Any Text (Max field length:255)	no title
ModuleDescription	Course Description	Any Text (Max field length: None)	None
ModuleMoreInfoHyperlink	More Information Hyperlink	Any Text (Max field length:500)	None
ModuleDurationComments	Duration Comments	Any Text (Max field length:100)	None
ModuleSubject	Subject	Name of a Predefined Course Subject Any Text (Max field length:50)	None
ModuleCategory	Category	Name of a Predefined Course Category Any Text (Max field length:50)	None

ModuleImage	Image for Catalog Display	A valid URL for an image, e.g., http://www.abc.com/abc.png or /ekp/nd/fresco/repository/EKP0002343.jpg Any Text (Max field length:100)	None
ModuleShowInCatalog	Show in catalog	Y or N	N
ModuleArchive	Archive	Y or N	N
ModuleArchiveDate	Auto-Archive Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
ModulePeerComments	Allow peer review/comments	Y or N	Y
ModuleChargeType	Module Charge Procedure	Must be one of: • NONE - No charge. • PER REG - Charged per Registration • ONLINE - Online Payment	NONE (that is, No charge).
ModuleCost	Course Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
ModuleCurrency	Module Charge Currency	A three-letter currency code, e.g., GBP or USD	None
ModulePriceInfo	Currency Cost Price Info	Any Text (Max field length:300)	None
ModuleCostCenter	Charged Cost Center	Any Text (Max field length:45)	None
ModuleTokenCost	Token Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
ModuleTokenPriceInfo	Token Cost Price Info	Any Text (Max field length:300)	None
ModuleLanguage	Language	Name of a Predefined Course Language or ISO 2-char codes, e.g., en, fr_CA, es_ES Any Text (Max field length:50)	English
ModuleVendor	Vendor	Name of a Predefined Course Vendor Any Text (Max field length:255)	None
ModuleCertification	Certification Name	Name of a Predefined Certification Any Text (Max field length:1,000)	None
ModuleExams	Exams	List of predefined exam IDs, delimited by vertical bars, e.g., EXAM1|EXAM2|EXAM3	None
ModuleExamsMandatory	Exams are mandatory.	Y or N	N

ModuleExamCompletesModule	Passing exam(s) automatically completes this module	N - No Y - Any of the selected exams. A - All of the selected exams.	N
ModuleEvaluation	Evaluation	Exam ID of Predefined Evaluation	None
SupervisorAssessment	Supervisor Assessment	Exam ID of Predefined Supervisor Assessment	None
ModuleCatalogs	Assign course to catalogs	A list of catalog names, each of which may be hierarchical, separated by a vertical bar, e.g., A/B/C1|A/B/C2	None
ModuleAudience	Audience	List of descriptions delimited by vertical bars ("|"). Each description has a maximum length of 255.	None
ModuleObjectives	Objectives	List of descriptions delimited by vertical bars ("|"). Each description has a maximum length of 2,000.	None
ModuleAllowUserWithdraw	Allow users to WITHDRAW	Y or N	Y
ModuleUserWithdrawReason	Prompt user for reason for the withdrawal	Y or N	N
ModuleAllowUserComplete	Allow users to mark Completed (Self-Asserted)	Y or N	Y
ModuleAllowStatusChange	Allow status changes to be made at any time (e.g., ignore standard business rules)	Y or N	N
ModuleAllowReEnroll	Allow re-enrollment	Y or N	Y
ModuleEnrollmentPolicy	Enrollment Policy	Name of a Predefined Enrollment Policy Any Text (Max field length:50)	None
ModuleOrgPolicyFirst	Org policy overrides course policy.	Y or N	N
ModuleKcEnable	Enable the Knowledge Center for this module	Y or N	Y
ModuleKcShowPictureArea	(KC) AREA: Show picture area	"Y", "N" or "I" ("I", Knowledge Center show picture area configuration inherits from catalog setting)	Y
ModuleKcPicture	KC Picture URL	A valid URL for an image, e.g., http://www.abc.com/abc.png or /ekp/nd/fresco/repository/EKP0002343.jpg Any Text (Max field length:255)	None
ModuleKcAllowCourseLaunch	Allow module launches in KC	Y or N	Y

ModuleKcCourseLink	Course link always launches the KC instead of the course.	Y or N	N
ModuleKcAssessmentWorkflow	(KC) AREA: Show assessment workflow area	Y or N	Y
ModuleKcCertification	(KC) AREA: Show certification area	Y or N	Y
ModuleKcContactList	(KC) AREA: Show contact list area	Y or N	Y
ModuleKcCourseSummary	(KC) AREA: Show course summary area	Y or N	Y
ModuleKcEvaluation	(KC) AREA: Show evaluation area	Y or N	Y
ModuleKcForum	(KC) AREA: Show forum area	Y or N	Y
ModuleKcInstructorList	(KC) AREA: Show instructor list area	Y or N	Y
ModuleKcNews	(KC) AREA: Show news area	Y or N	Y
ModuleKcNotepad	(KC) AREA: Show notepad area	Y or N	Y
ModuleKcPeerComments	(KC) AREA: Show peer comments area	Y or N	Y
ModuleKcReferences	(KC) AREA: Show references area	Y or N	Y
ModuleKcStatusChange	(KC) AREA: Show status change area	Y or N	Y
ModuleKcExam	(KC) AREA: Show exam area	Y or N	Y
ModuleKcInstructorAboutMe	(KC) AREA: Show About Me for the instructor	Y or N	Y
ModuleKcInstructorReferences	(KC) AREA: Show reference share area for instructors	Y or N	Y
ModuleKcFileShare	(KC) AREA: Show file share area	Y or N	N
ModuleKcHomeworkDropBox	(KC) AREA: Show homework drop box	Y or N	N
ModuleKcMarkedHomework	(KC) AREA: Show marked/reviewed homework	Y or N	N
ModuleKcTranscript	(KC) AREA: Show transcript area	Y or N	Y
ModuleKcQuickEvaluation	(KC) AREA: Show quick evaluation area	Y or N	N
ModuleKcShowModule Attributes	(KC) AREA: Show Module Attributes	Y or N	Y
CreateWikiSpace	Create Wiki Space	Y or N	N
WikiSpaceName	Wiki Space Name	Any Text (Max field length: None)	Course Title
ModuleEvalMandatory	Mandatory Evaluation	Y or N	N

TemplateID	Template	Name of a Predefined Template (Updates only)	None
PermReplace	Permissions Action	"Y" - to completely replace permission settings on this course using permissions from the "master template". "N" - to add to existing permission settings on this course using permissions from the "master template".	N
PermTemplateID	Permissions Template	Learning object ID whose permissions are used as a "master template" for this course.	None
ModuleRequireESignatures	Require eSignatures	Y or N	N
ModuleAllowReopen	To prevent a participant from reopening this module once it has been completed, use the setting below.	Y or N	Y
ModuleAllowPublicAccess	This module/program currently allows public access.	Y or N	Y
ModuleSupportContact	Course Support Contact	Any Text (Max field length:255)	None
Prereq_Lid	Prerequisites	List of module IDs delimited by vertical bars ("|"). The maximum length of the list is 255.	None
Prereq_Check_Type	Prerequisite Check Type	NO_PREVIOUS, ENROLLED, CMI_COMPLETE, or COMPLETE. Only effective when used with PREREQ_LID list.	ENROLLED
Prereq_Logic	Prerequisite Check Type	AND, OR. Only effective when used with PREREQ_LID list.	AND
Prereq_Lid_Sec	Prerequisites	List of module IDs delimited by vertical bars ("|"). The maximum length of the list is 255.	None
Prereq_Check_Type_Sec	Prerequisite Check Type	NO_PREVIOUS, ENROLLED, CMI_COMPLETE, or COMPLETE. Only effective when used with PREREQ_LID list.	ENROLLED
Prereq_Logic_Sec	Prerequisite Check Type	AND, OR. Only effective when used with PREREQ_LID list.	AND

ModuleAllowSelfEnrollment	Allow self-enrollment	Y or N Applicable only for the following types: • R - Classroom • M - Exam • O - Online • T - Task • V - Virtual Classroom • U - Virtual Classroom (Archived) • W - Workshop/Seminar	Y
ModuleAllowSessionTransfer	Allow session transfer	Y or N	N
SessionID	Session Code	Any Text (Max field length:85)	None
SessionTitle	Session Title	Any Text (Max field length:255)	None
SessionDescription	Session Description	Any Text (Max field length: None)	None
SessionStatus	Session Status	Must be one of: • active - Active • pending - Pending • completed - Completed • closed - Closed • cancelled - Cancelled • invitation - Invitation Only • prompt - Prompt user to select session. • retired - Retired • ended - Ended	Observe System Configu-ration setting
SessionLanguage	Delivery Language	Name of a Predefined Course Language or ISO 2-char codes, e.g., en, fr_CA, es_ES or *AUTO* Any Text (Max field length:50)	Auto-Select
SessionDeadlineDays	Completion Deadline (Days)	Days from Enrollment (0 implies unlimited)	None
SessionDeadlineDate	Completion Deadline (Date)	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None

SessionDeadlineHandling	Completion Deadline Handling	N - Do nothing, the deadline was just for reference Y - Set transcript to DEADLINE EXPIRED and block learner from launching the course B - Block learner from launching other courses until they complete this course	N
SessionSeatLimitRule	Session Seat Limit Rule	Empty or one of: • FIXED - Based on min/max enrollment limits • DYNAMIC - Based on facility size/capacity	Depends on learning type
SessionMaxUsers	Session Enrollment Limit Maximum	Any Positive Whole Number	None
SessionMinUsers	Session Enrollment Limit Minimum	Any Positive Whole Number	None
SessionCountPendingInTotal	Count "Pending Approval" records in total current enrollments	Y or N	N
SessionWithdrawDaysLimit	Cannot withdraw within N days of start date	Any Positive Whole Number	None
SessionChargeType	Session Charge Procedure	Must be one of: • NONE - No charge. • PER REG - Charged per Registration • MODULE - Use Module Configured Settings • ONLINE - Online Payment	Use Module Configured Settings
SessionCost	Session Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
SessionCurrency	Session Charge Currency	A three-letter currency code, e.g., GBP or USD	None
SessionPriceInfo	Session Level Currency Cost Price Info	Any Text (Max field length:300)	None
SessionCostCenter	Charged Cost Center	Any Text (Max field length:45)	None
SessionTokenCost	Session Level Token Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
SessionTokenPriceInfo	Session Level Token Cost Price Info	Any Text (Max field length:300)	None

SessionWaitListHandling	Session Level Waitlist Handling	Must be one of: • AUTO - Automatic Upgrade • MANUAL - Manual (Administrator) Upgrade • ALL - Waitlist all learners. • NONE - No waitlist	AUTO
SessionEnrolmentStart	Session Level Enrollment Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
SessionEnrolmentEnd	Session Level Enrollment End Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
SessionTrainingHours	Credits	A decimal value with up to two decimal places, e.g., 12.50 or 5.25	0
SessionCustomText	Session Level Custom Text	Any Text (Max field length:255)	None
SessionTimeZone	Session Level Time Zone	Time zone ID	System Time Zone
SessionInstructors	Session Instructor List	List of user IDs belonging to instructors to be assigned to the session, separated by vertical bar, e.g. instr1^assignmentId1 | instr2^assignmentId2| instr3^assignmentId3	None
SessionApprovers	Session Approver List	Up to two user IDs belonging to approvers to be assigned to the session, separated by vertical bar (e.g., appr1^assignmentId1| appr2^assignmentId2)	None
SessionGeographicRegion	Session Geographic Region	Name of a Predefined Geographic Region	None
SessionAssessmentWorkflow Template	Session Assessment Workflow Template Name	Name of a Predefined Assessment Workflow Template	None
SessionDisableWorkflow Assignment	Disable workflow assignment for the session	Y or N	N
ShowSessionSelection Reminder	Session level "Show session selection reminder"	Y or N	Y
SessionAllowPromptSession SelfEnrollment	Session Level "Make Prompt user to select session available for self-enrollment"	Y or N	N

SessionDroppedWaitlistTarget Session	Session Level target session for "Transfer users dropped from waitlist to the following session"	Session Code (*NONE* to clear)	None
ClassStart	Class Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
NewClassStart	New Class Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
ClassEnd	Class End Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
ClassFacilityCode	Class Level Facility Code	Code of Predefined Facility Any Text (Max field length:85)	None
ClassVenue	Class Level Venue	Any Text (Max field length:255)	None
ClassRoomName	Class Level Room Name	Any Text (Max field length:255)	None
ClassInstructors	Class Instructor List	List of user IDs belonging to instructors to be assigned to the class, separated by vertical bars, e.g., instr1^assignmentId1 | instr2^assignmentId2| instr3^assignmentId3	None
Launch.Href	Launch HREF	URL for content launch	None
Launch.Interface	Launch Interface	Type of launch handler: • 0 – Generic Web Launch • 3 – Structured Content • 5 – Resource • 7 – Timed HTML • 14 – Rustici Engine	None
Launch.RuntimeEnvironment	Runtime Environment	Type of runtime environment for Launch Interface 5 – Resource: • g – Generic/none • s – JavaScript API • a – AICC/HACP • x – xAPI (also known as 'Tin Can API') • t – Exam	None
Launch.ExamId	Launch Exam Id	Launchable exam identifier	None
Online.Win_Height	Online Window Height	Height (pixels) of window	None

Online.Win_Width	Online Window Width	Width (pixels) of window	None
Online.Grading_Method	Online Grading Method	Grading Method (online only) • H - Highest • A - Average • F - First • L - Last	None
Online.Completion_Method	Online Completion Method	Completion Method (online only) • A - Auto • M - Manual	None
Online.Mastery_Score	Online Mastery Score	Mastery Score (online only)	None

Program CSV Loader Field Reference

Use the reference tables below to help you correctly format the program data you want to import via the Program CSV Loader.

Setting Custom Attribute Values

To assign values to custom module or session attributes, add the name of the attribute to the end of the heading row, prefixed with `MA-` or `SA-` respectively. For example, `"SA-My Custom Session Attribute"`.

Depending on the attribute type, the loader requires attribute values to be formatted as follows.

Table: Attribute Types

Attribute Type	Required Format
Free text	Any character or string enclosed in double quotes. Maximum length is 2,000 characters.
Text area	Any character or string enclosed in double quotes. Can include HTML markup. Maximum length is 2,000 characters, including any markup.
Drop-down	The code of one of the module attribute values defined for the drop-down.
Numeric	A number, which can include a decimal point (for example, `48.72`).
Check box	`Y` or `N`.
Date	Must be in the format *yyyy-MM-dd HH:mm:ss (for example*, `2020-08-25 13:00:00` denotes August 25, 2020, 1:00 p.m.).

Table: Program CSV Loader field reference

Field	Content (in Catalog Editor)	Data Handling	Default
Action		Must be "A", "D", or "U" (Add, Delete, or Update)	None
ProgramID	Module ID	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 85 characters)	None
ProgramTitle	Course Title	Any text (Max field length:255)	no title

ProgramDescription	Course Description	Any text (Max field length: None)	None
ProgramMoreInfoHyperlink	More Information Hyperlink	Any text (Max field length:500)	None
ProgramDurationComments	Duration Comments	Any text (Max field length:100)	None
ProgramSubject	Subject	Name of a Predefined Course Subject Any text (Max field length:50)	None
ProgramCategory	Category	Name of a Predefined Course Category Any text (Max field length:50)	None
ProgramImage	Image for Catalog Display	A valid URL for an image, e.g., http://www.abc.com/abc.png or /ekp/nd/fresco/repository/EKP0002343.jpg Any text (Max field length:100)	None
ProgramShowInCatalog	Show in catalog	Y or N	N
ProgramArchive	Archive	Y or N	N
ProgramArchiveDate	Auto-Archive Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
ProgramPeerComments	Allow peer review/comments	Y or N	Y
ProgramChargeType	Module Charge Procedure	Must be one of: • NONE - No charge. • PER REG - Charged per Registration • ONLINE - Online Payment	NONE (that is, No charge).
ProgramCost	Course Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
ProgramCurrency	Module Charge Currency	A three-letter currency code, e.g., GBP or USD	None
ProgramPriceInfo	Currency Cost Price Info	Any text (Max field length:300)	None
ProgramCostCenter	Charged Cost Center	Any text (Max field length:45)	None
ProgramTokenCost	Token Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
ProgramTokenPriceInfo	Token Cost Price Info	Any text (Max field length:300)	None
ProgramLanguage	Language	Name of a Predefined Course Language or ISO 2-char codes, e.g., en, fr_CA, es_ES Any text (Max field length:50)	English

ProgramVendor	Vendor	Name of a Predefined Course Vendor Any text (Max field length:255)	None
ProgramCertification	Certification Name	Name of a Predefined Certification Any text (Max field length:1,000)	None
ProgramExams	Exams	List of predefined exam IDs, delimited by vertical bars, e.g., EXAM1|EXAM2|EXAM3	None
ProgramExamsMandatory	Exams are mandatory.	Y or N	N
ProgramExamCompletesModule	Passing exam(s) automatically completes this module	N - No Y - Any of the selected exams. A - All of the selected exams.	N
ProgramEvaluation	Evaluation	Exam ID of Predefined Evaluation	None
ProgramEvalMandatory	Mandatory Evaluation	Y or N	N
ProgramCatalogs	Assign course to catalogs	A list of catalog names, each of which may be hierarchical, separated by a vertical bar, e.g., A/B/C1|A/B/C2	None
ProgramAudience	Audience	List of descriptions delimited by vertical bars (|). Each description has a maximum length of 255.	None
ProgramObjectives	Objectives	List of descriptions delimited by vertical bars (|). Each description has a maximum length of 2,000.	None
ProgramAllowUserWithdraw	Allow users to WITHDRAW	Y or N	Y
ProgramUserWithdrawReason	Prompt user for reason for the withdrawal	Y or N	N
ProgramAllowUserComplete	Allow users to mark Completed (Self-Asserted)	Y or N	Y
ProgramAllowStatusChange	Allow status changes to be made at any time (e.g., ignore standard business rules)	Y or N	N
ProgramAllowReEnroll	Allow re-enrollment	Y or N	Y
ProgramEnrollmentPolicy	Enrollment Policy	Name of a Predefined Enrollment Policy Any text (Max field length:50)	None
ProgramShareCreditsValidityPeriod	Validity of Learning	Whole positive number or zero	0
ProgramKcEnable	Enable the Knowledge Center for this module	Y or N	Y
ProgramKcShowPictureArea	(KC) AREA: Show picture area	"Y", "N" or "I" ("I", Knowledge Center show picture area configuration inherits from catalog setting)	Y

ProgramKcPicture	KC Picture URL	A valid URL for an image, e.g., http://www.abc.com/abc.png or /ekp/nd/fresco/repository/EKP0002343.jpg Any text (Max field length:255)	None
ProgramKcAllowCourseLaunch	Allow module launches in KC	Y or N	Y
ProgramKcCourseLink	Course link always launches the KC instead of the course.	Y or N	N
ProgramKcAssessmentWorkflow	(KC) AREA: Show assessment workflow area	Y or N	Y
ProgramKcCertification	(KC) AREA: Show certification area	Y or N	Y
ProgramKcContactList	(KC) AREA: Show contact list area	Y or N	Y
ProgramKcCourseSummary	(KC) AREA: Show course summary area	Y or N	Y
ProgramKcEvaluation	(KC) AREA: Show evaluation area	Y or N	Y
ProgramKcForum	(KC) AREA: Show forum area	Y or N	Y
ProgramKcInstructorList	(KC) AREA: Show instructor list area	Y or N	Y
ProgramKcNews	(KC) AREA: Show news area	Y or N	Y
ProgramKcNotepad	(KC) AREA: Show notepad area	Y or N	Y
ProgramKcPeerComments	(KC) AREA: Show peer comments area	Y or N	Y
ProgramKcReferences	(KC) AREA: Show references area	Y or N	Y
ProgramKcStatusChange	(KC) AREA: Show status change area	Y or N	Y
ProgramKcExam	(KC) AREA: Show exam area	Y or N	Y
ProgramKcInstructorAboutMe	(KC) AREA: Show About Me for the instructor	Y or N	Y
ProgramKcInstructorReferences	(KC) AREA: Show reference share area for instructors	Y or N	Y
ProgramKcFileShare	(KC) AREA: Show file share area	Y or N	N
ProgramKcHomeworkDropBox	(KC) AREA: Show homework drop box	Y or N	N
ProgramKcMarkedHomework	(KC) AREA: Show marked/reviewed homework	Y or N	N
ProgramKcTranscript	(KC) AREA: Show transcript area	Y or N	Y
ProgramKcQuickEvaluation	(KC) AREA: Show quick evaluation area	Y or N	N

ModuleKcShowModule Attributes	(KC) AREA: Show Module Attributes	Y or N	Y
ProgramWikiSpace	Create Wiki Space	Y or N	N
ProgramSpaceName	Wiki Space Name	Any text (Max field length: None)	Course Title
PermReplace	Permissions Action	"Y" - to completely replace permission settings on this course using permissions from the "master template". "N" - to add to existing permission settings on this course using permissions from the "master template".	N
PermTemplateID	Permissions Template	Learning object ID whose permissions are used as a "master template" for this course.	None
ProgramRequireESignatures	Require eSignatures	Y or N	N
ProgramSupportContact	Program Support Contact	Any text (Max field length:255)	None
SessionID	Session Code	Any text (Max field length:85)	None
SessionTitle	Session Title	Any text (Max field length:255)	None
SessionDescription	Session Description	Any text (Max field length: None)	None
SessionStatus	Session Status	Must be one of: • active - Active • pending - Pending • completed - Completed • closed - Closed • cancelled - Cancelled • invitation - Invitation Only • prompt - Prompt user to select session. • retired - Retired • ended - Ended	Observe System Configu-ration setting
SessionLanguage	Delivery Language	Name of a Predefined Course Language or ISO 2-char codes, e.g., en, fr_CA, es_ES or *AUTO* Any text (Max field length:50)	Auto-Select
SessionDeadlineDays	Completion Deadline (Days)	Days from Enrollment (0 implies unlimited)	None

SessionDeadlineDate	Completion Deadline (Date)	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
SessionDeadlineHandling	Completion Deadline Handling	N - Do nothing, the deadline was just for reference Y - Set transcript to DEADLINE EXPIRED and block learner from launching the course B - Block learner from launching other courses until they complete this course	N
SessionMaxUsers	Enrollment Limits/Max:	Any positive whole number.	None
SessionMinUsers	Enrollment Limits/Min:	Any positive whole number.	None
SessionCountPendingInTotal	Reserve seats for learner enrollments pending approval field, allowing or disallowing this functionality.	Y N	0
SessionWithdrawDaysLimit	Cannot withdraw/transfer within	Any positive whole number	0
SessionWaitListHandling	Waitlist Handling	• AUTO (Automatic Upgrade) • MANUAL (Manual (Administration) Upgrade) • ALL (Waitlist all learners) • NONE (No waitlist) • NO-RESERVE (Manual (Administrator) Upgrade without Reserving Seats)	AUTO
SessionDroppedWaitlistTargetSession	Transfer users dropped from waitlist to the following session functionality and designates the appropriate session.	Enter the session number to activate the setting and designate the session. Enter "NONE" to clear a session and deactivate the field.;	None
SessionChargeType	Session Charge Procedure	Must be one of: • NONE - No charge. • PER REG - Charged per Registration • MODULE - Use Module Configured Settings • ONLINE - Online Payment	Use Module Configured Settings
SessionCost	Session Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
SessionCurrency	Session Charge Currency	A three-letter currency code, e.g., GBP or USD	None

SessionPriceInfo	Session Level Currency Cost Price Info	Any text (Max field length:300)	None
SessionTokenCost	Session Level Token Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
SessionTokenPriceInfo	Session Level Token Cost Price Info	Any text (Max field length:300)	None
SessionCostCalculation	Program Cost Calculation	Must be one of: • SessionCost - Use amount specified above • TotalCost - Use total cost of modules in program session (individual debit transactions and a zero debit transaction for the program)	Use amount specified above
SessionTimeZone	Session Level Time Zone	Time zone ID	System Time Zone
SessionInstructors	Session Instructor List	List of user IDs belonging to instructors to be assigned to the session, separated by vertical bar, e.g. instr1^assignmentId1 | instr2^assignmentId2| instr3^assignmentId3	None
SessionStart	Session Level Enrollment Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
SessionEnd	Session Level Enrollment End Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
SessionApprovers	Session Approver List	Up to two user IDs belonging to approvers to be assigned to the session, separated by vertical bar (e.g., appr1^assignmentId1| appr2^assignmentId2)	None
SessionPayment	For program modules with payment configured: Enforce payment before first launch.	Y or N	N

SessionOrdered	Modules cannot be accessed until all preceding modules are completed.	"N", "Y", "YF", "YH", or "YFH" "N" and "Y" are for disabling and enabling the option respectively. Appending an "F" will enable the "Allow learner to advance to next order on failing preceding learning" sub-option. Excluding it implies it should be disabled. Appending an "H" will enable the "Hide modules blocked by preceding modules in Learner's Available Modules" sub-option. Excluding it implies it should be disabled.	N
SessionRevision	Program completion requires modules to be on Effective/ Approved revision	"Y" if program completion requires modules to be on Effective/ Approved revision, otherwise "N".	N
SessionCredits	Use predefined credits	Y or N	Y
SessionNumberCredits	Required Credits for Elective Modules	Whole positive number or zero	0
SessionPassingScore	Passing Score	Positive number	0
SessionAssessmentWorkflow Template	Session Assessment Workflow Template Name	Name of a Predefined Assessment Workflow Template	None
SessionDisableWorkflow Assignment	Disable workflow assignment for the session	Y or N	N
SessionAssignedModuleID	Assigned module	Course ID of Selected Course	None
SessionAssignedModuleSessionID	Session	Session code for nonprogram type modules; session ID for program type modules	None
SessionAssignedModuleWeight	Weighting	Positive number	0.0
SessionAssignedModuleOrder	Order	Integer between 0 and 127	0
SessionAssignedModuleCredits	Credits	Positive number	0
SessionAssignedModuleRequired	Required	Y or N	Y
SessionAssignedModuleEnrollment	Auto-enroll when available	Y or N	Y

SessionAssignedModuleAvailability	Available for self-enrollment	One of: • "P(1D)" where "1" can be replaced by any non-negative integer to denote the number of days after Parent Program Enrollment for availability • "O(2D)" where "2" can be replaced by any non-negative integer to denote the number of days after advancing to the module order for availability • "D(2016-01-31 17:00:00)" where "2016-01-31 17:00:00" can be replaced by any date in the same yyyy-MM-dd HH:mm:ss format from which the module will be available	P(0D)
SessionAssignedModuleDeadline	Progress Tracking Deadline	One of: • "I" Inherit from program deadline • "P(1D)" where "1" can be replaced by any natural integer to denote the number of days after Parent Program Enrollment as a deadline • "M(2D)" where "2" can be replaced by any natural integer to denote the number of days after Assigned Module Enrollment as a deadline • "D(2016-01-31 17:00:00)" where "2016-01-31 17:00:00" can be replaced by any date in the same yyyy-MM-dd HH:mm:ss format as a fixed date deadline	I

Class Resource Attribute Reference

Use the information in the table below to help you create or edit class resource attributes.

Field	Description
Attribute Code	Enter a unique attribute code for the attribute.
Name	Enter a descriptive name for the attribute. For multi-language systems, you can enter the text label key and the LMS will automatically display the translated label value.
Type	Select the attribute's data type from the drop-down list. This determines the types of values that can be assigned to the attribute.
Resource Type	Select one or more check boxes to specify the type of resource the attribute applies to.
Display Areas	Select one or more check boxes to specify where the attribute is shown to administrators and learners in the LMS: • Class Resource Filter—Enables you to filter the list of class resources by the attribute in the Class Resources page. • Class Resource Column—Adds a column to the Class Resource page so that you can see at-a-glance the attribute's value for each resource. • Summary Overlays—Accessed in the Resource Planner, Catalog Editor and Class Resource selector. • Catalog Editor Recommended Class Resources

Class Resource Details Reference

Use the information in the table below to help you create or edit a class resource.

Field	Description
Code	Enter a unique code for the resource. This field is mandatory.
Name	Enter a name for the resource to help identify what the resource is when scheduling it. This field is mandatory.
Image for class resource	To select an image for the resource, click the **browse** icon. The Repository Manager opens in a new window, from which you can select an image. If the image is larger than 150 x 150 pixels, you can scale it in the Image Editor.
Training Center	To restrict the resource to a specific training center, select it from the drop-down list.
Facility	To restrict the resource to a specific facility in the selected training center, select it from the drop-down list.
Resource Type	Select the type of resource from the drop-down list. If none of the predefined types accurately reflect the type of resource, select **Other**.
Serial Number	Enter the resource's serial number, if it has one. You can use serial numbers to keep track of multiple identical resources.
Description	Enter a description of the class resource. The description is one of the columns shown in the list of resources in the Class Resources page.
Quantity on Hand	Enter how many instances of this resource are available. This field is mandatory.
Pre Processing Time	Enter the number of days notice required before the resource can be booked. For example, if three days pre-processing time is required to book the resource, it cannot be scheduled within three days of creating the event. Pre-processing time might include transporting the resource from storage or another training location, for example.

Post Processing Time	Enter the number of days required to process the resource after the end of a scheduled event (for example, a classroom training session). The resource will not be available for booking for this number of days after its scheduled booking.

Enrollment Limits Based on Facility

You can base the limit for the maximum number of enrollments in a physical class on the capacity of the training facility hosting it. This enrollment limit also takes into consideration other enrollments that might have taken place for other courses using the same facility at the same time. If a facility's maximum number of seats is set to zero, this is interpreted as not having a limit.

Seats Remaining Calculation Logic

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

```
Remaining seats = facility capacity - max { total number of enrollments in a particular
period of all the sessions' class schedules }
```

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

```
remaining seats = min {
  facility capacity - max { total number of enrollments in a particular period of the
sessions' class schedules }
} of all facilities involved in the session
```

This is more easily demonstrated via some examples.

Scenario A

Facility *F1* has only 30 seats.

Sessions *S1*, *S2* and *S3* have classes all located at *F1* on the same day, with their schedules overlapping. Suppose that each session has 10 learners enrolled.

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

Example 1

S1 (10:00-11:30)

S2 (09:00-11:00)

S3 (10:45-12:00)

In this example, since there is a period in time when all three classes are in the same facility, all 30 seats in the facility have effectively been used up and no more enrollment can be accepted for any of the three sessions.

Example 2

S1 (10:00-11:30)

S2 (09:00-11:00)

S3 (11:15-12:30)

In this example, at any point in time, there is at most 20 learners in the facility, therefore, the number of seats which remain available for enrollment is 10.

Scenario B

Consider the more complicated scenario where one session has two classes held at different facilities:

- Facility *F1* has 30 seats. Facility *F2* also has 30 seats.
- Sessions *S1*, *S2* and *S3* each have a class located at *F1* on Day 1, with their schedules overlapping.
- Each session has 10 learners enrolled.
- Session *S1* has an additional class located at *F2* on Day 2.

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

At facility *F1* on Day 1:

S1 (10:00-11:30)

S2 (09:00-11:00)

S3 (11:15-12:30)

At facility *F2* on Day 2:

S1 (10:00-11:30)

In this example, although facility *F2* has 30 seats available for the single session on Day 2, there are only 10 free seats available for enrollment at any time on day 1 for sessions *S1* and *S2*. Therefore, the maximum number of seats remaining for enrollment in session *S1* is 10, because the participants will be attending both days.

Scenario C

Facility *F1* has 30 seats.

Sessions *S1*, *S2* and *S3* have classes located at *F1* on Day 1, with their schedules overlapping. Each session has 10 learners enrolled.

In addition, *S1* has another class located at *F1* on Day 2, and so does session *S4*, which has 20 learners enrolled.

At facility *F1* on Day 1:

S1 (10:00-11:30) ———

S2 (09:00-11:00) ————

S3 (11:15-12:30) ——

At facility *F1* on Day 2:

S1 (10:00-11:30) ———

S4 (09:00-11:00) ========

In this example, since no more enrollment is possible for *S1* on Day 2, it is not possible to enroll another learner for *S1* even though 10 seats are available on Day 1.

> The timezone set at the session level is taken into consideration when working out class schedule overlap. It must be ensured that this is set appropriately for the facility in question.

LMS Functions that Use Seats Remaining Calculations

The seat availability logic is used by the following LMS features:

- The available number of seats for enrollment, as displayed in the LMS or retrieved via the API.
- The enrollment process
- Waitlist handling

In the example in Scenario C, if waitlisting is enabled with automatic upgrade, and one of the enrolled learners decides to withdraw from session S4, then it is possible for a waitlisted learner of either S1 or S4 to become enrolled. The order upgrade precedence depends on who joined the waitlist first.

Scenario D: Waitlist Upgrade

Facility *F1* has 5 seats.

Session *SA* has a fixed enrollment limit of *2* while session *SB* has a dynamic enrollment limit.

Their classes are both located at *F1* at the same time and both sessions have the waitlist option set to *Automatic Upgrade*.

Two learners are enrolled in session *SA* and three learners are enrolled in session *SB*. Further enrollment attempts will result in learners being waitlisted.

The following examples show how the order in which learners are waitlisted can affect the auto-upgrade result.

Example 1

Learner *B* attempts to enroll onto session *SB* and is waitlisted.

Learner *A* attempts to enroll onto session *SA* and is waitlisted.

Now if a learner withdraws from session *SA*, both learners *A* and *B* will be upgraded and become enrolled onto sessions *SA* and *SB* respectively. This is because the upgrade logic considers all waitlisted users in both sessions *SA* and *SB* since they are located at *F1*.

As learner *B* is wait-listed before learner *A*, they are considered first, using the dynamic enrollment limit on session *SB*. A spare seat at the facility *F1* means learner *B* can become enrolled. Next, learner *A* is considered using the fixed enrollment limit of *2*. After the withdrawal, there is only one learner in session *SA* so learner *A* is upgraded.

Example 2

Learner *A* attempts to enroll onto session *SA* and is waitlisted.

Learner *B* attempts to enroll onto session *SB* and is waitlisted.

In this situation, if a learner withdraws from session SA, only learner A is upgraded:

- As learner *A* is waitlisted before learner *B*, they are considered first, using the fixed enrollment limit of session *SA*.
- After the withdrawal there is only one learner in session *SA* so learner *A* is upgraded. Now learner *B* is considered, using the dynamic enrollment limit for session *SB*. After the learner *A* is enrolled, the facility is full again so learner *B* remains waitlisted.

However, if a learner withdraws from session *SB*, only learner *B* is upgraded:

- As learner *A* is waitlisted before learner *B*, they are considered first, using the fixed enrollment limit of session *SA*. As there are still two learners in session *SA*, learner *A* remains waitlisted.
- Now learner *B* is considered, using the dynamic enrollment limit for session *SB*. A spare seat at the facility *F1* means learner *B* can become enrolled.

Facilities Field Reference

Use the information in the tables below to help you create or edit a facility.

Room Information

Field	Description
Facility Code	Code used to uniquely identify the facility. It can include spaces. This field is mandatory.
Outlook Reference	Enter the outlook email address reference (required for Exchange Server integration).
Location	If the facility is not within a training center, enter a location in this field.
Training Center	Select the training center where the training facility is located. If the facility is not in a training center, you can enter a Location and leave the Training Center as *Default*.
Status	If the facility is available for booking immediately, select **Available** from the Status drop-down list. Otherwise, select **Not Available**.
Category	Select the type of facility from the drop-down list.
Venue	Enter the Venue name. This is shown with the Facility Code where the facility is referenced in the Knowledge CenterCourse Details and class session. This field is mandatory.
Contact Info:	Enter the Contact Info facility. This is shown to learners when they select the facility in the Knowledge CenterCourse Details.
Directions	Enter the Directions for the facility. This are shown to learners when they select the facility in the Knowledge CenterCourse Details.
Map	To provide learners with a map of the facility, click the **browse** icon. The Repository Manager opens in a new window. Navigate to the map file and click **Select** to select the map.

Room Equipment

Field	Description
Room is expandable?	Click the checkbox if the room is expandable.
Moveable Seating	Click the checkbox if seating in the room can be rearranged.
Has a display PC?	Click the checkbox if the room has a display PC that can be used for a course.
Video Conferencing	Click the checkbox if the room has video conferencing that can be used for a course.
Minimum # of Seats	Enter the minimum number of seats for the room.
Maximum # of Seats	Enter the maximum number of seats for the room.
# of VGA Projectors	Enter the number of available VGA projectors.
# of Monitors	Enter the number of available monitors.
# of Overhead Projectors	Enter the number of available overhead projectors.
# of Learner PCs	Enter the number of available learner PCs.
# of Whiteboards	Enter the number of available standard whiteboards.
# of Interactive Whiteboards	Enter the number of available interactive whiteboards.

Catalog Properties Field Reference

The table below describes the available catalog properties.

Field	Description
Title	Enter the name of the Catalog. This is the name users see in the Catalog Browser, Catalog Search, and Home or Widget Page. This field is mandatory.
Reference Code	Enter an optional reference code. This appears in parenthesis after the title in the Catalog List Maintenance page. It is not visible to learners. You can use reference codes to help course administrators identify the correct courses to assign to catalogs when catalogs are available in multiple languages. With a reference code assigned to a catalog, administrators will be able to assign modules to all catalogs that have the same reference code without having to understand the title in different languages.
Comments	Enter optional comments about the catalog (for example, elaborate on the types of courses to include).
Language	If your PeopleFluent Learning supports multiple languages, and you want to display the catalog in the learners' preferred language, select **Multi-Language** from the drop-down list. To display the catalog only in a specific language, select it from the drop-down list.
Responsible Party	Enter the name of the person who controls or organizes the materials assigned to the catalog.

Catalog Display Format	Select the catalog display format from the drop-down list. This determines how catalogs are displayed in the Catalog Browser, and has more options for the legacy user interface (UI). There is a separate System Configuration setting for the catalog display format in the Catalog Search results. For visually stimulating navigation in the legacy UI, PeopleFluent recommends using Format 3 for the top-level catalog, and Format 1 or 2 for individual catalogs. See the table below for descriptions of the catalog display formats.
Picture	Click the **browse** icon to select the image to display when the Catalog Display Format includes a picture. Alternatively, you can enter the path to the image as an absolute or relative URL. Images are displayed in different aspect ratios in the legacy user interface (UI) and new responsive UI. In the legacy UI, to see the whole image in the catalog, it must be no bigger than 150 x 150 pixels. In the new responsive UI, images are displayed in approximately a 16:9 width-to-height ratio. Any image size greater than 500 pixels wide can be used and will be scaled without distortion to fit. On the main Catalog Maintenance List page, you can assign random images to catalogs and courses that have no images assigned. Please see Create and Manage LMS Course Catalogs for additional information.
Allow users to access the catalog without logging in	Select this check box to allow users to view the catalog without logging into the LMS. Please see **About Catalog Permissions** in this topic for additional information.

Additionally, grant permissions as defined in parent	Select this check box to inherit the access permissions configured for the parent catalog. Any changes made to the parent catalog's permissions are automatically applied to this catalog. Once you set permissions for a catalog, it will be available to learners who are part of the permission group. It is a good idea to not grant any viewing permissions when you are drafting a catalog. Only set the permissions when you are ready for the catalog to be accessed.

Enrollment Policy Field Reference

The table below is a guide to configuring fields for enrollment policy details.

Field	Description
Policy Name	Enter a unique name for the enrollment policy. This field is mandatory.
Enrollment types that need to send the Enrollment Confirmation	Select the types of enrollment for which an enrollment confirmation email is sent to the learner.
Enrollment Confirmation	If you selected any enrollment types to send enrollment confirmation emails for, click the **browse** icon to select the enrollment confirmation email template.
Enrollment Pending Notification Waitlisted Notification Withdrawal Notification Approved Notification Denied Notification Session Transfer Notification New Sessions Available Notification Policy Remarks	Optionally, click the **browse** icon for each notification type to select the email template to use. They are all optional—if you leave any blank the LMS will not send a notification email for it.
Policy Remarks	Optionally, enter any remarks for the policy. These remarks appear only in the Enrollment Policy Summary in the Enrollment Policy Editor.

Allow approval withdrawal	If the enrollment policy is to include enrollment approval, by default learners can withdraw their enrollment request while waiting for approval. To disallow learners from withdrawing their enrollment request while waiting for enrollment approval, clear the **Allow approval withdrawal** check box.
Prompt user for reason for the withdrawal	If learners are allowed to withdraw their enrollment approval request, select the **Prompt user for reason for the withdrawal** check box if you want them to provide a reason.
Consider organization level payment plan options	Select the **Consider organization level payment plan options** check box if you want to use the payment plan set up for the learners' organization.
Parallel Approval Steps	If the enrollment policy is to include multiple parallel approval steps, select whether the first approval response determines the enrollment approval, or whether all parallel approval steps must succeed for the enrollment to be approved.

Enrollment Policy Approval Step Field Reference

The table below is a guide to configuring fields for enrollment policy approval steps.

Field	Description
Step Name	Enter a name for the approval step (for example, *Step 1 - Manager Approval*. This field is mandatory.
Approver Selection Type	Select from the drop-down list the type of approver. If you want to select a specific approver, who does not correspond to one of the approver types in the list, select **Use Approver Entered Below**.
Designated Approver	This field is enabled only if you select **Use Approver Entered Below** for the Approver Selection Type. Click the **browse** icon to select the LMS user you want to approve this step.
Approval Request	Click the **browse** icon to select the email template to be used to send out the enrollment request notification when the learner requests enrollment in a course or program.
Click if you don't want this step to expire	This check box is selected by default for new steps. If you want this approval step to expire, clear the check box. You can then specify the expiration period and what happens after expiry.
Expiration Period	If you cleared the check box so that the step can expire, enter the number of days it will expire after it has begun. (If this is the first step, it begins when the learner requests enrollment in a course or program. Subsequent steps begin when the previous step has completed.)
Action Taken When Step Has Expired	If you cleared the check box so that the step can expire, select from the drop-down list whether the enrollment is approved or denied when the approval step expires.
Expiration Notification	Click the **browse** icon to select the email template to be used to send out the approval expiration notification email.
Reminder Day	If you cleared the check box so that the step can expire, enter the number of days before expiry that the approval reminder email will be sent to the approver.
Approval Reminder	Click the **browse** icon to select the email template to be used to send out the enrollment request approval reminder.

Step Remarks	Optionally, enter any remarks for the approval step. These remarks appear only in the Approval Step Details in the Enrollment Policy Editor.
Click if this is a manual step	Select the check box if you want this approval step to take place outside of the LMS. If you select this option, enrollments using this policy cannot be approved via the LMS. Once the learner has sent the enrollment request they can access the Knowledge Center and launch the course.
This step is parallel with the adjacent step(s)	If you want this approval step to be processed in parallel with other approval steps for the policy, select this check box for each step. The enrollment request notification is sent, and can be approved or denied, at the same time as other approval steps that have this option selected.
Prompt for additional information in each approval step	Select the **Charged Cost Center** check box to prompt the approver for the cost center to charge for the enrollment on approval. To send an email outside of the LMS regarding the charged cost center for the enrollment during approval, select the **E-mail to whom notification regarding the charged cost center is needed** check box. The approver must enter an email address when prompted for the charged cost center.
Notify Email	If you selected the **E-mail to whom notification regarding the charged cost center is needed** check box to send a notification email during approval, click the **browse** icon to select the email template to use to send the email. The email is sent to the address entered manually during approval in addition to any recipients specified in the email template.

Enrollment Policy Withdrawal Field Reference

The table below is a guide to configuring fields for enrollment policy withdrawal details.

Field	Description
Enter withdrawal details below	If the enrollment policy allows learners to withdraw their enrollment, you can enter withdrawal instructions in this text box. For example, you can ask learners to withdraw only up to a certain number of days before the start of the course.
Enable withdrawal approval	Select this check box if you want an approver (for example, the learner's direct appraiser) to approve the learner's enrollment withdrawal.
Allow user to cancel withdrawal request	Select this check box if you want to allow learners to cancel their enrollment withdrawal requests. This applies only when you enable withdrawal approval. If the enrollment policy does not require withdrawal approval then learners are withdrawn from the enrollment immediately.
Approver Selection Type	If you have enabled withdrawal approval, select from the drop-down list the type of approver who will review and take action on withdrawal requests. This can be: • The default system approver, as assigned in the learner's logical domain • The learner's direct appraiser • The approver selected in the Designated Approver field • The approver in the learner's organization
Designated Approver	If you have enabled withdrawal approval and selected **User Approver Entered Below** from the Approver Selection Type list, click the **browse** icon to select the approver. (You may need to click **Save** on the toolbar to enable the Designated Approver field.)

Approval Request	If you have enabled withdrawal approval, click the **browse** icon to select the email template to be used to send out a withdrawal request notification when the learner requests withdrawal from a course or program.
Cost/Enrollment Information % of Course Fee Refunded / Number of Days Before Module Start Date	Specify the refund amount as a percentage of the full cost of *enrollment* to be refunded or credited to the learner upon withdrawal from a course within a certain number of days. Click **Add >>** to enter different refund percentages for different numbers of days before the start date. For example, you can specify a lower percentage refund closer to the start date.
Optional Payment Items % of Cost Refunded / Number of Days Before Module Start Date	Specify the refund amount as a percentage of the full cost of any *optional payment items* to be refunded or credited to the learner upon withdrawal from a course within a certain number of days. Click **Add >>** to enter different refund percentages for different numbers of days before the start date. For example, you can specify a lower percentage refund closer to the start date.

Payment Plan Properties Reference

Use the table below to help you configure a payment plan.

FIeld	Description
Title	Enter a name for the payment plan. This field is mandatory.
All enrollments use online payment?	Select this check box if all enrollments use online payment.
Allow payment by organization's credit card?	Select this box to allow learners on this payment plan to pay for enrollments using the credit card of the organization the plan is assigned to.
Purchase order reference required?	If the payment plan allows payment by the organization's credit card, select this check box if a purchase order reference is required for each enrollment.
Allow payment by organization's account?	Select this check box to allow the learner's organization to pay for courses with online payments.
Purchase order reference required?	If the payment plan allows payment by the organization's account, select this check box if a purchase order reference is required for each enrollment.
All enrollments have been prepaid?	Select this check box if all enrollments using this payment plan have been prepaid. Learners will not need to pay at the time of enrollment.
Prepaid Expiration Date	Select the date on which prepayment for enrollments expires. Learners will have to pay for enrollments after this date.
Date-limited Discount %	Enter the percentage discount on enrollments using this payment plan.
Discount Expiration Date	Select the date on which the discount for enrollments expires.
Usage Discount %	Enter the percentage discount to apply for a minimum number of enrollments using this payment plan.
# Enrollments Required for Discount	Enter the minimum number of enrollments required before the usage discount is applied.

Token Package Field Reference

Use the field descriptions in the following table to help you create and edit token packages.

Field	Description
Package Name	Enter a unique name to identify the token package. This field is mandatory.
Label Key	For multi-language systems, you can enter the text label key for *Package Name* in the custom *.properties* file and the LMS will automatically display the translated label value.
Status	Select the status of the token package (Active or Suspended). Only active packages can be bought.
Tax Rate	Enter the Tax Rate as a percentage.
Net Cost	Enter the net cost of the package (the cost excluding tax). The Total Cost is calculated according to the Tax Rate. You can leave this field blank and enter the Total Cost instead. The Net Cost is then calculated based on the Tax Rate.
Tax	Shows the portion of the Total Cost attributed to tax.
Total Cost	If you have not entered a Net Cost figure, enter the Total Cost of the token package including tax. The Net Cost is calculated based on the Total Cost and Tax Rate. The Total Cost is the amount paid to buy the package.
Currency	Select the currency used to buy the token package.
Token Value	Enter the number of tokens in the package. When a user buys one unit of this package, the Token Value is credited to the organization's token account.
Package Expiry	Use one of the following fields to specify the package expiry: • Set Date—select a date in the calendar control on which the package will expire. Expired token packages are not available for purchase. • Expires in—enter the number of days after purchase when the package will expire.

Token Account Data Loader Field Reference

Use the reference table below to help you correctly format the token account data CSV file you want to import via the Token Account Data Loader.

Field	Content	Data Handling	Default
Action		Must be I (Initialize), A (Add) or D (Delete). Case insensitive.	None
Level1Desc	Organization hierarchy level 1 description. This is the organization name of the top-level organization you want to create or delete a token account for, or add tokens to.	Any text. Can include spaces. Must not include the field delimiter or quotation marks. Maximum field length: 85.	None
Level2Desc	Organization hierarchy level 2 description. This is the organization name of the second-level organization you want to create or delete a token account for, or add tokens to. To target this organization, you must enter all organization levels in the hierarchy, starting at level 1 and ending at this level.	Any text. Can include spaces. Must not include the field delimiter or quotation marks. Maximum field length: 85.	None

Level3Desc	Organization hierarchy level 3 description. This is the organization name of the third-level organization you want to create or delete a token account for, or add tokens to. To target this organization, you must enter all organization levels in the hierarchy, starting at level 1 and ending at this level.	Any text. Can include spaces. Must not include the field delimiter or quotation marks. Maximum field length: 85.	None
Level4Desc	Organization hierarchy level 4 description. This is the organization name of the fourth-level organization you want to create or delete a token account for, or add tokens to. To target this organization, you must enter all organization levels in the hierarchy, starting at level 1 and ending at this level.	Any text. Can include spaces. Must not include the field delimiter or quotation marks. Maximum field length: 85.	None

Level5Desc	Organization hierarchy level 5 description. This is the organization name of the fifth-level organization you want to create or delete a token account for, or add tokens to. To target this organization, you must enter all organization levels in the hierarchy, starting at level 1 and ending at this level.	Any text. Can include spaces. Must not include the field delimiter or quotation marks. Maximum field length: 85.	None
UserId	LMS User ID. You can enter this to derive the user's organization to add tokens to.	A Unique ID That Conforms to the LMS ID constraints. Maximum field length: 85.	None
TokenAccountName	The name of the token account to create, delete or add tokens to.	Any text. Can include spaces. Must not include the field delimiter or quotation marks. Maximum field length: 200.	None
TokenValue	The token value to add to the token account.	Positive number.	None

ExpiryDate	Optional expiry date for the token value.	The following date formats are supported: • dd-mm-yy (e.g. "31-12-13") • dd-mm-yyyy (e.g. "31-12-2013") • dd-mmm-yy (e.g. "31-dec-13") • dd-mmm-yyyy (e.g. "31-dec-2013") Leave blank or enter NONE for no expiry date. For dd-mm-yy and dd-mmm-yy formats, where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.	None
ExpiryTimezone	Time zone code.	One or more characters that denote a time zone code (for example, *EST* for Eastern Standard Time in North America).	None

Training Records CSV Loader Field Reference

Use the reference tables below to help you correctly format the training records you want to import via the Training Records CSV Loader.

Field	Content	Data Handling
USERID	User ID	If blank, a classroom and session will be created with no associated training record.
LEARNINGID	Learning ID	Enter the learning object ID to create training records for. A classroom and session will be created even if there is no USERID tagged to this code.
LOTITLE	Learning Module Title	A classroom and session will be created even there is no USERID tagged to this module title.
ENROLLDATE	Enrollment Date	The following date formats are supported: • dd-mm-yy HH:MM (e.g. "31-12-19 18:30") • dd-mm-yyyy HH:MM (e.g. "31-12-2019 18:30") • dd-mmm-yy HH:MM (e.g. "31-dec-19 18:30") • dd-mmm-yyyy HH:MM (e.g. "31-dec-2019 18:30") 00:00 will be the assumed time if HH:MM values are not specified Enter `NONE` for no specified date. For dd-mm-yy and dd-mmm-yy formats where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.
STARTDATE	Transcript Detail Start Date	See Enrollment Date, above.

ENDDATE	Transcript Detail End Date	See Enrollment Date, above.
STUDENTSTATUS	Transcript Overall Status	Enter one of the following transcript overall status values: • Pass • Completed • Active • Withdrawn • Deactivated • Exempt If the value is *Active*, the learner will be enrolled to the learning module. If the record has valid dates for STARTDATE and ENDDATE (including past of future dates), the transcript overall status will be set to *In Progress*; otherwise it will be set to *Not Started*. For new program enrollments, the transcript overall status will be set to *Completed* if the learner has already satisfied all program completion requirements.
CREATESESSION	True or false	Enter `true` to create a new session. Enter `false` to update existing sessions based on the SESSIONCODE, STARTDATE, and ENDDATE. This applies only to Classroom, Virtual Classroom and Workshop/Seminar learning types. If no session exists, a new session will be created regardless of the value entered here.
Training Venue	Facility Code of the session or event	When a new session is created, the facility code you enter here is used for the training record. If code provided does not exist, it will not be set.

Instructor	Instructor User IDs	When a new session is created, the User IDs you enter here is used for the training record. To specify more than one instructor, separate their User IDs with a vertical bar (for example, `instr1|instr2|instr3`), If the user IDs provided are not valid, this value will not be set.
SESSIONSTATUS	Learning module event status	Enter one of the following values for when a new session is created: • Active • Completed • Cancelled
SESSIONCODE	Session Code of the session or event	When updating a session, enter the session code to identify a specific session in a multi-session course. When creating a session, the session will take the specified value. If you do not specify a session code, it will be generated in the format as configured in System Configuration.
SESSIONTITLE	Session Title of the session or event	Enter a session title to be used when a new session is created or when the session start date and end date are updated.
SCORE	Assessment Score	You can enter an assessment score for classroom courses.

LOTYPE	Learning Type	Enter one of the following learning type values when S*kip enrollment check* is enabled: • C - Program • M - Exam • O - Online • R - Classroom • W - Workshop/Seminar • 1 - Self Training (Paper) • 2 - Self Training (Video) • 3 - Special Interest Group • 4 - Coaching
ACTION	Action	This field is ignored when S*kip enrollment check* is enabled. Enter A to add a learning record for the learner if none exists for the specified module session and start date. Enter U to update the learner's record for the specified module session. If left blank, the data loader will add a learning record for the learner if none exists for the specified module session, or update the learner's record if one already exists.
AssignmentID	Assignment ID	Enter the Assignment ID of the user's assignment in which the training record should be updated/ created.
PRESCORE	Pre-assessment score	Enter a pre-assessment score. This is a numeric field.
POSTSCORE	Post-assessment score	Enter a post-assessment score. This is a numeric field.

LANGUAGE	Language	Enter the name of the predefined course language or the assigned language with an ISO 2-char code. For example, *en*, *fr_CA*, *es_ES*. This applies when inserting a new transcript record or creating a new session in a specific language. Max field length: 50.
SESSIONTIMEZONE	Session level time zone	Enter the time zone.
DEADLINEDAYS	Completion deadline (days)	Enter the completion deadline as the number of days from Enrollment (0 implies no deadline).
DEADLINEDATE	Completion deadline (date)	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.
Parent Program ID	The Learning ID of the program context in which enrollment is intended	Applicable for new enrollments only and ignored when updating a transcript. The learner must already be enrolled on the specified program and the session must involve the specified child module. This field is ignored if *Skip enrollment check* is enabled.
Transfer Session Code	Code of session to transfer learner to	The code of a session within the same module to transfer the Learner to. Only applicable when updating an existing enrollment. This field is ignored if *Skip enrollment check* is enabled.
Performance Grade	Performance Grade ID	Enter one of the following values: • 1 - Excellent • 2 - Very Good • 3 - Good • 4 - Average • 5 - Poor • `*NONE*` - to clear

External Training Records CSV Loader Field Reference

Use the reference table below to help you correctly format the competencies data you want to import via the External Training Records CSV Loader.

FIeld	Content	Description
Action	Control action (either add, delete or update)	Must be *A*, *D*, *U*, or *AU* (Add, Delete, Update, Add or Update as appropriate).
RecordID	Record ID	A unique ID that conforms to PeopleFluent LMS ID constraints (maximum 15 characters).
UserId	User ID	A unique ID that conforms to PeopleFluent LMS ID constraints (maximum 85 characters).
Title	Title	Any text (maximum length: 255).
CourseType	Learning Type	Must be one of: • TNS - (not specified) • C - Program • R - Classroom • O - Online • W - Workshop/Seminar
StartDate	Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, for example, 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.
EndDate	End Date	Must be in the format yyyy-MM-dd HH:mm:ss, for example, 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.

Status	Status	Must be one of: • 0 - Open for editing • 1 - Pending Approval • 2 - Approved • 3 - Approval Denied • 4 - Completed • 5 - Cancelled
Subject	Subject	Name of a predefined course subject (maximum length: 50).
Grade	Grade	Any text.
Score	Score	Any text.
TrainingHours	Duration(Training hours)	A decimal value with up to two decimal places, for example, 12.50 or 5.25.
Cost	Course Cost	A monetary value with up to two decimal places, for example, 250 or 350.55.
Currency	Module Charge Currency	A three letter currency code, for example, GBP or USD.
Language	Language	The ISO code for the assigned language. For example, en, fr, fr_CA, es_ES. If no language is specified, it defaults to multi-language.
VendorInfo1	Vendor Information	Any text.
Comments	Comments	Any text.
AssignmentID	Job Profile Assignment ID	If multiple assignments is enabled, this is the learner's job profile assignment ID.

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.

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.

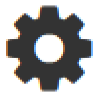
Additional Information

Create a User Targeting Template

User Targeting Templates in Data Loaders

Permissions

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.

Allowed Transitions Between Dynamic Attribute Types

Table: Allowed transitions between dynamic attribute types

Transition	Effect on objects that have assigned a value to the attribute
From Drop-Down to Free Text	The drop-down attribute value on the object will be changed to the drop-down value code as free text. The possible dynamic attribute values configured for the former drop-down dynamic attribute will be deleted.
From Free Text to Drop-Down	Existing free text values on objects will be used to generate a set of possible dynamic attribute values for the new drop-down dynamic attribute.
From Free Text to Text Area	Existing free text values on objects will be moved to the text area.
From Free Text to Numeric	All free text values on objects will be checked to make sure they are either blank or numeric values before the change is allowed to take place.
From Numeric to Free Text	The numeric values on objects will become free text.
From Text Area to Free Text	Existing text area values on objects will be moved to the free text.

Attribute Option Values

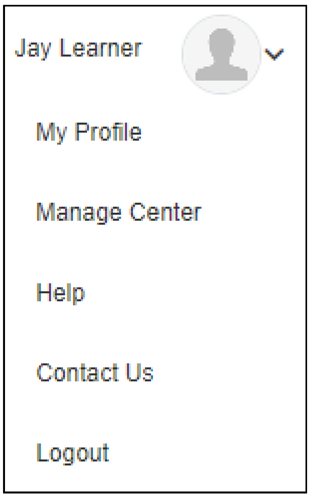
You can configure the options for drop-down list attributes.

Table: Attribute option fields

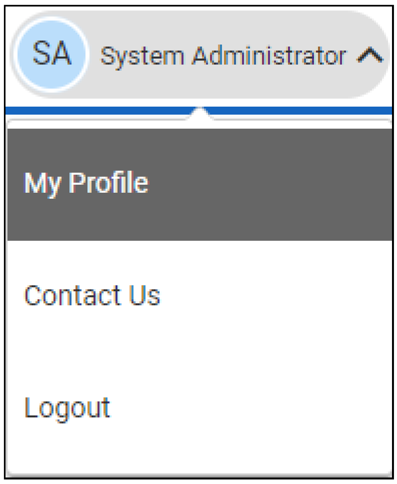
Field	Description
Code	Enter a unique identifier for the attribute's drop-down option value.
Label Key	Enter the label for the drop-down option value. This is the value shown in the drop-down where it appears in the LMS. For multi-language systems you can enter the label key that will be used to look up the localized value in the user's preferred language.
Description	Enter a description of the option value, if required.

Avatar 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).

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 button 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.

Additional Information

About User Targeting Templates

User Selector

Permissions

Permissions

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

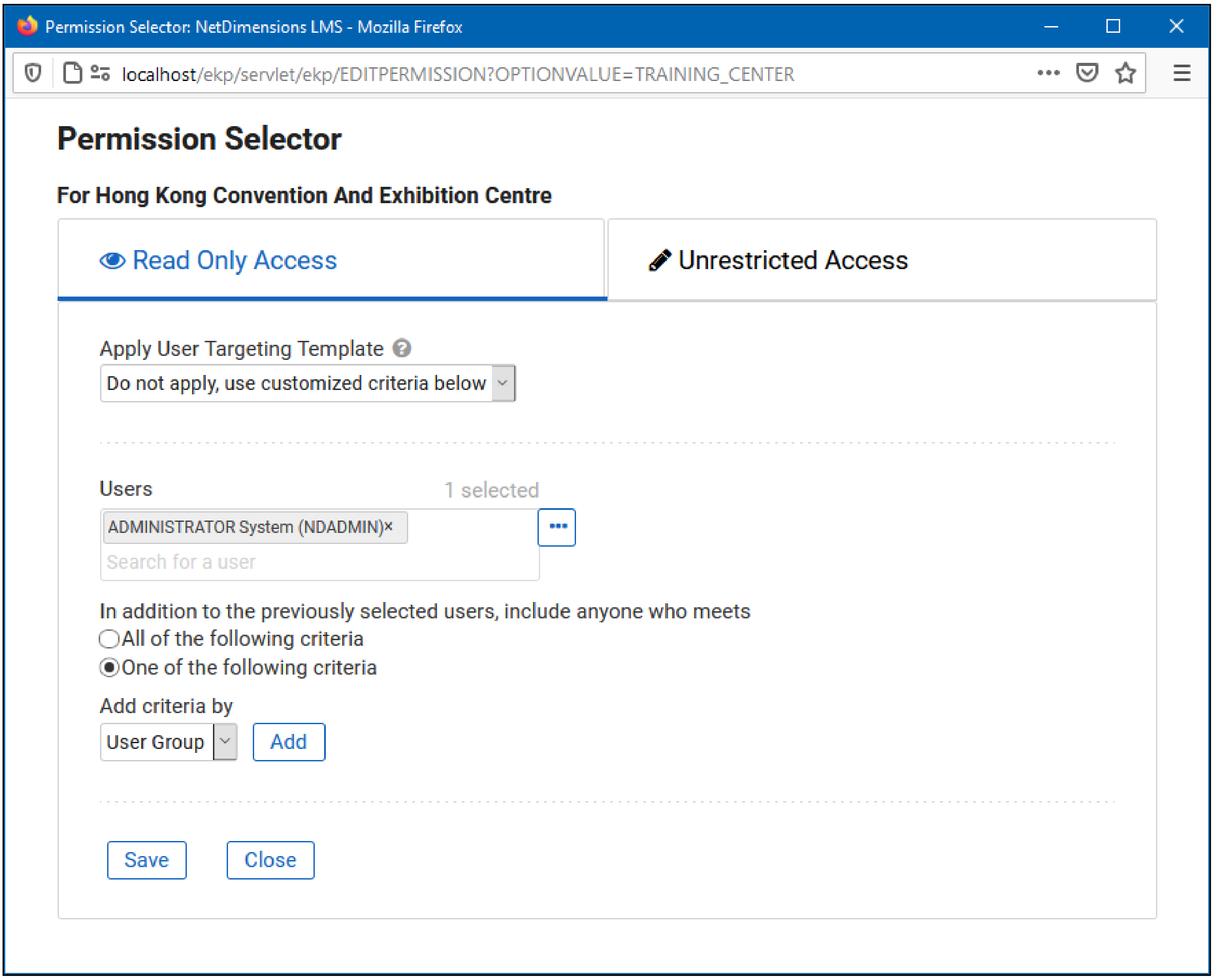


Figure: Permission Selector for Read Only Access to a Training Center

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.

Additional Information

Select Users for Permissions

About User Targeting Templates

The Repository Manager

The PeopleFluent Learning Repository serves as a platform where organizations can add and manage files that are accessible across the system. These could include course materials for both learners and instructors, certificates, details about courses or training centers, and images utilized in course catalogs.

This content is administered in the Repository Manager. Here, an administrator can organize and manage uploaded files. Repository Manager has two areas:

- **Personal Folders** lists the folders and files you have created.
- **Shared Public Folders display the folders and files that fellow administrators have generated and shared with you.**

To perform these tasks, you must have *Repository Manager* feature in System Roles (Manage Features > Manage Features)

Create a Repository Folder

Repository content is organized in folders. As an administrator adding content, you will create additional folders in the Personal Folders area. Once a folder is created, you can define its access permissions so other LMS users, including learners, can access it.

When determining the folder structure, considering how you intend to arrange your files can be beneficial. For instance, organizing them by department, course, or organization.

To create a new folder

1. Go to **Manage Center > Learning > Repository > Repository Manager**.
2. Click **Create folder**.
3. Enter a folder name and description(optional).
4. Click **Create**.
5. To set permissions for the folder:
    a. Click the Permissions link.
    b. Select users and/or user groups to grant read only or full access permissions for the folder.
    c. Click Save.

6. By default, all sub-folders and content within the folder will inherit the folder's permissions. To change this,

   a. Click the Properties link.
   b. Clear the Folder permissions are inherited by subfolders..
   c. Click Save.

6. Click **Back to Repository**. The new folder is added to the list. Note: You may need to click **Refresh** to see the new folder in the Folders tab.

Upload a File to the Repository

In addition to uploading single files, you can upload multiple files in a zipped folder. When you upload the file, the system recognizes it as a ZIP file and prompts whether you wish to extract its contents. Note: All files extracted will have the same description (the filename) so you may want to update the descriptions individually.

You can also configure access permissions for files independently of those configured for the folder containing the file. To do this, be sure that the folder is not configured to force all content to inherit permission settings.

> Uploading the same file more than once does not replace its previous versions, as all files have unique internal filenames in the LMS. To replace a file, see **Replace a File in the Repository** below.

To upload a file to the repository

1. Go to **Manage Center > Learning > Repository > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.
2. Click the folder you want to upload the file to. The folder's Overview page opens, where you can see its files and sub-folders.
3. Click **Upload**.
4. Click **Choose File** to select a file to upload.
5. Optionally, enter a description for the file. The description appears only in Repository Manager.
6. Click **Upload**. The Upload Results page opens.
7. Click **OK** to complete the upload, or **Cancel Upload** to cancel it.

Replace a File in the Repository

You can replace an existing file in the repository with a new file, and all references to the original file are updated to reference the replacement file.

To update a file with a new version, you must use the Replace function, not the Upload function. Uploading the same file more than once does not replace its previous versions, as all uploaded files are assigned unique internal filenames in the LMS. Replacing a file keeps its unique identifier.

> When you replace a file the LMS does not update the original file's name. If your replacement file has a different filename, and you want to use the new name in the LMS, you can change the file's name by updating its properties.

To replace a file with a new version

1. Go to **Manage Center > Learning > Repository > Repository Manager**.
2. Click the folder containing the file you want to replace.
3. Select the check box of the file you want to replace and click **Replace**.
4. Click **Choose File** to select a file to upload, replacing the original file.
5. Click **Upload**. The Upload Results page opens.
6. Click **OK** to complete the upload, or **Cancel Upload** to cancel it.

Configure File Access Permissions

If you have updated a folder's properties so that its files and sub-folders do not inherit its access permissions, you can configure the access permissions for its files and sub-folders individually. Remember that you must configure Read Only access for a file or its parent folder so that other LMS users, including learners, can access it.

Administrators with unrestricted access to the *Repository Manager* feature in System Roles (Manage Features > Manage Features) and unrestricted access permission on the file can set the access permissions for it.

To set the access permissions for a file

1. Go to **Manage Center > Learning > Repository > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.
2. Click the **[Properties]** link of the folder containing the file or sub-folder you want to set access permissions for. The folder's Overview page opens.
3. Clear the **Folder permissions are inherited by subfolders** check box if it is selected.
4. Click **Back to Repository** to return to the folder.
5. Click the **[Properties]** link of the file you want to set access permissions for. The file's Overview page opens.
6. Click **Permissions**. The Permissions Selector opens in a new window.
7. Assign the Read Only and Unrestricted Access permissions as required. For example, to enable all learners to view the file, in the Read Only tab add the Role criteria and select

the Learner role. When you save the permissions, the Permissions Selector closes and you are returned to the File's Overview page.

8. Click **Save**.

Transcript Detail Visibility

The data access control *Display Details, Progress, and Course Interactions when Reviewing Learner Transcript Detail* controls the reviewer's view of the transcript detail for those being reviewed. By default, only the System Administrator role has this access enabled.

An administrator can grant differing access to the transcript detail of those being reviewed to reviewers, direct appraisers, and instructors from the Organization Maintenance page. Similar to the *Level of Visible Transcript Detail for learners* option in System Configuration, the levels of transcript detail visibility can be set to:

- Completion Status Only
- Details and Overall Progress
- Details, Overall Progress, and Individual SCO Progress

  Shareable Content Object. These are the individual, reusable learning components within a SCORM package.
- Details, Overall Progress, Individual SCO Progress, and Course Interactions

The Transcript Detail page is not accessible from the Records/Transcript page for users with their visibility level set to *Completion Status Only*.

Users with visibility level set to any of the other options above have access to the Transcript Details page to view more transcript detail. Additionally, users with *Details, Overall Progress, Individual SCO Progress, and Course Interactions* have full access to all information on the Transcript Details page.

If a reviewer can view full transcript details, they can also open the Transcript Details page by clicking the course title links. In the Active/Archive Course areas of the Teach menu, full transcript detail is always displayed except when a transcript is in Pending Approval or Waitlisted status in User Review. The level of transcript detail available under the Administrative Access area is controlled by the same rule as the CDC.

Instructors are usually able to see full transcript details. However, in some highly regulated countries, even instructors are not allowed to have access to transcript details like question responses and scores. In cases like this, the LMS has a feature to control the level of transcript details instructors can view, which is configurable at the organization level. This setting complements the other two options that apply to the direct appraiser or to reviewers in general.

When the reviewer is both an instructor of the course and the direct appraiser of the learner, whichever has the greater level of visibility is granted to the reviewer.

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.

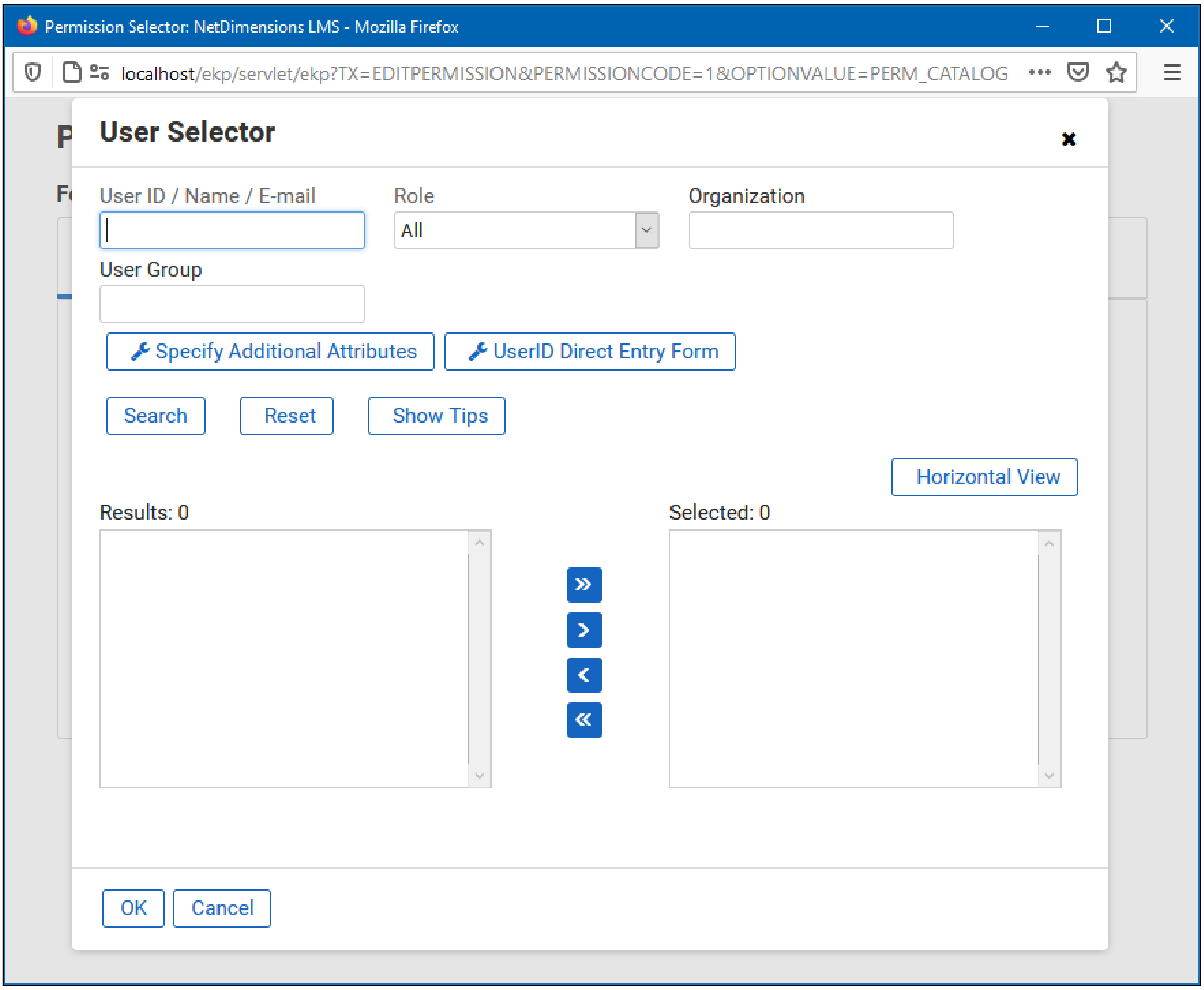


Figure: User Selector Accessed from the Permission Selector

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.

Additional Information

Permissions

About User Targeting Templates

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.

Additional Information

About User Targeting Templates

Create a User Targeting Template