PeopleFluent Learning

Exams Administration

Release 25.06

Contents

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Exams Administration

The PeopleFluent LMS allows you to create, distribute and grade exams with flexibility and ease. It supports a wide range of question types and assessment formats, ensuring a comprehensive evaluation of learner knowledge, which integrating advanced features for security, accessibility and feedback.

Specifically, exams administration tasks include:

- Developing questions and question pools.
- Creating exams that utilize the questions.
- Configuring automatic exemption policies.

Create and Manage Question Pools

Question pools are used to group related questions for exams. They can have a hierarchical structure, with one or more topic pools to further categorize content.

An example question pool hierarchy for organizing questions for an exam about computer operating systems might be structured as follows:

- Operating Systems *(question pool)*
    - Desktop *(topic pool)*
        - Windows *(sub-topic pool)*
        - MacOS *(sub-topic pool)*
        - Linux *(sub-topic pool)*
    - Mobile *(topic pool)*
        - *Android (sub-topic pool)*
        - iOS *(sub-topic pool)*

Question pools have general properties that are applied by default to new questions created in the pool. These defaults can be overridden on the question level.

In this topic, we focus on managing question pools in the **Question Pools Manager**. Question pools can also be added and managed in bulk through an import process. For additional information, please see Import Question Pool Data via the Data Loader.

> To configure question pools you must have unrestricted access to the *Exam Utilities* feature in System Roles (Manage Features > Exam Manager Features).

Add a Question Pool

To add a first-level question pool

1. Go to **Manage Center > Learning > Exam Utilities > Question Pools Manager**.
2. Click the **Add** button to the right of the **Question Pool:** drop-down field.
3. The **New Name** field is shown. Enter a name for the new pool and click **Submit**.

Add a Topic Pool

You can add a topic pool as a sub-level of a first-level question pool or as a sub-level of another topic pool.

To add a topic pool

1. Go to **Manage Center > Learning > Exam Utilities > Question Pools Manager**
2. Select an option in the **Question Pool:** drop-down field. If you are adding a topic pool to an existing topic pool, choose an option from the **Topic Pool:** drop-down field.
3. Click the **Add** button associated with the Topic Pool level for which you are creating a new Topic Pool.
4. The **New Name** field is shown. Enter a name for the new pool and click **Submit**.
5. Enter a name for the new pool and click **Submit**.

Configure the General Question Pool Properties

After adding a question pool, you can update it to configure default properties for new questions created in the pool, specify the program or module sessions for automatic exemption, and select users to receive email notifications when there are questions pending approval.

> Default Question Pool properties are applied automatically to new questions created in the pool, but can be overridden at the question level. They are not automatically applied to existing questions.

To configure the general pool properties

1. Go to **Manage Center > Learning > Exam Utilities > Question Pools Manager.**
2. Select the question, topic or sub-topic pool from the drop-down lists.
3. Click **Update** for the pool you want to update.
4. Update the settings in the **General** section as required. These will be the default values applied to new questions created in the pool. *They are not automatically applied to existing questions*. For detailed information about the available settings, please see Pool General Properties Field Descriptions.
5. Move on to the **Automatic Exemptions** section or click the **Submit** button to save the properties.

Configure Question Pool Automatic Exemptions

The system allows you to automatically exempt learners from specific programs or module sessions if they score sufficiently on questions from a question pool.

> Further configuration is needed for automatic exemptions for exam pools, and exemption policies must also be configured. For more information, see Configure and Manage Automatic Exemption Policies.

To select a program or learning module for automatic exemption

1. Go to **Manage Center > Learning > Exam Utilities > Question Pools Manager.**
2. Select the question, topic or sub-topic pool from the drop-down lists.
3. Click the **Update** button.
4. In the **Automatic Exemptions** section, click the **+** icon.
5. Choose the appropriate courses.
6. Select **OK**.

To remove a program or learning module, click on it in the list and then select the **-** icon.

Configure Question Pool Email Notifications

You can configure the question pool to send reminder notifications to yourself and other administrators when questions are added to the pool that require approval.

To configure reminder emails

1. Go to **Manage Center > Learning > Exam Utilities > Question Pools Manager.**
2. Select the appropriate question, topic or sub-topic pool from the drop-down lists.
3. Click the **Update** button.
4. In the **Reminders** section, configure the email recipients and email frequency.
    a. In the **Recipients** field, click the selection button.
    b. Choose the appropriate users and click **OK**.
    c. In the **Frequency** field, select a frequency for the emails. Notifications are only sent when there are questions in the pool that have not been approved.
5. Click **Submit**.

Configure Question Pool Permissions

Permissions can be configured for question, topic and sub-topic pools to specify who can edit them or assign questions to them. Depending on your organization's syste configuration, permissions from a parent pool to each of it's child pools may be inherited. When this is not the case, you will need to explicitly set permissions on any child pools. For more information, please see the System Administration guide.

> Permissions do not cascade down the hierarchy. For example, administrators with permissions for a topic pool will not have those same permissions for any sub-topic pools under it. You must configure permissions at each pool level for other administrators to use them.

To configure question pool permissions

1. Go to **Manage Center > Learning > Exam Utilities > Question Pools Manager.**
2. Select the question, topic or sub-topic pool from the drop-down lists.
3. Click the **Permissions** button.
4. Select the users to which you are granting read-only or unrestricted access permissions.
5. Click **Save**.
6. Click **Close**.

Merge Question Pools

You can merge question pools to move all of the questions from the source pool to another question pool. You then have the option to reassign questions within the target pool.

To merge a question pool

1. Go to **Manage Center > Learning > Exam Utilities > Question Pools Manager.**
2. Select **Merge Pools**.
3. Select the pool you want to merge from the source drop-down lists.
4. Select the pool you want to move the source level questions into from the target drop-down lists.
5. Click **Submit**. The page refreshes with a list of the questions that were moved.

Delete Question Pools

You can only delete question pools that do not have any questions assigned to them or any or their topic or sub-topic pools.

> If you want to delete a pool, but retain the questions, you can merge question pools together.

To delete a question pool

1. Go to **Manage Center > Learning > Exam Utilities > Question Pools Manager.**
2. Select the question, topic or sub-topic pool from the drop-down lists.
3. Click **Delete** for the pool you want to delete. The pool and its sub-pools in the hierarchy are deleted.

Import Question Pool Data via the Data Loader

In this topic, we focus on creating question pools in bulk. For information about managing question pools in the **Question Pools Manager**, please see Configure and Manage Question Pools.

Note: This is used primarily for data migration, not necessarily for ongoing support. It includes the ability to move a child pool from one parent to another.

> To import questions you must have read-only or unrestricted access to the *Exam and Question Manager* feature and unrestricted access to the *Data Loader* feature in System Roles (Manage Features > Exam Manager Features).

Download the CSV Import File

To download the CSV import file:

1. Go to **Manage Center > Learning > Exam Utilities > Question Pools Data Loader**.
2. Download the CSV file template.

Prepare the File for Import

Prepare the file for import by entering the necessary values in the fields. Please see Question Pools Data Loader Field Reference for detailed information about the fields. Or, you can click the CSV Formatting Help link for guidance on each field.

The lower number "level" columns must be populated if a higher level number is being added, updated, or deleted. For example, Levels 1 and 2 are required if Level 3 is the pool to which the action applies. All other columns are optional.

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 Question Pools Data

To import question pools data

1. Go to **Manage Center > Learning > Exam Utilities > Question Pools Data 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 so that you can review the data before importing the file.
7. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
8. If any records failed to import, you can go back to the Permissions Data 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.

Copy a Question Pool to an Exam Pool

You can create new exam pool hierarchies by copying question pools. You can create an exam pool hierarchy from any level of a question pool. The selected pool, and its parent and child levels in the hierarchy, are created as an exam pool with the same structure. If you select a topic or sub-topic level to copy, other pools at the same level (that is, with the same parent pool) are not copied.

> To copy question pools to exam pools you must have unrestricted access to the *Exam Utilities* feature in System Roles (Manage Features > Exam Manager Features).

To copy a question pool to an exam pool

1. Go to **Manage Center > Learning > Exam Utilities > Question Pools Manager**.
2. Select the question pool from which you want to create an exam pool.
3. Click **Copy to exam pool**. An exam pool is created with the same structure, from question pool down to the lowest sub-topic pool level under the copied pool.

Create and Manage Questions

Questions help to measure the participant's knowledge, skills or understanding of the learning content. Creating exam questions often involves working with multiple individuals. For example, you can create and activate questions on your own, collaborate with subject matter experts who provide answers for your questions, or develop questions and answers together and then submit them for review before activation. The system settings determine whether questions must go through an approval workflow. For additional information, please see the System Administration guide.

In this topic, we focus on creating and managing questions in the **Questions Manager**. For information about importing question data, please see Question Import via the Data Loader.

> To create questions you must have read-only or unrestricted access to the *Exam and Question Manager* feature and unrestricted access to the *Questions* feature in System Roles (Manage Features > Exam Manager Features).

Create a Question

To create a question

1. Go to **Manage Center > Learning > Exam and Question Manager > Questions**.
2. Click **+ Create Question**.
3. A question ID is generated automatically, but you can override it in the **Enter the question ID:** field.
4. Select an option from the **Question Type** drop-down field. The LMS supports the following question types.

    - **Drag and drop** - The learner must drag the selection image to the correct area on the background image.
    - **Essay** - The learner enters free text.
    - **Fill in the blanks** - The learner enters the correct word or words which are missing in the question.
    - **Hotspot** - You define one or more hot areas in an image and the learner must select one of the areas to answer the question correctly. There can be more than one correct answer.
    - **Matching** - Provides two columns of up to 10 selections. Learners must select an answer from a drop-down list to match a specific question.
    - **Multiple choice** - A multiple choice question with up to five answers. Learners must select the check boxes for all correct answers.

- **Rating** - Select a single value between the minimum and maximum inclusive. The number of options is specified by the spread. Rating questions can be automatically graded by multiplying the selected rating by the maximum score for the question, and dividing by the spread.
- **Single choice** - The learner must select a single correct answer from up to four choices.
- **True/False** - The learner must select True or False from a drop-down list.
- **Triple Rating** - Provides three columns of ratings questions, which share a common low value label, high value label and spread.

The question type cannot be changed once the question has been created.

5. Select the appropriate question pool, topic pool or sub-topic pool to which you are assigning the question.
6. Click **Create**. The Details tab opens in the Question Editor.
7. Enter the question details. For information about managing questions details specific to each question type, please see Configure Details Specific to Question Types.
8. Click **Save**.

You must click the **Save** icon each time you update one of the **Question Editor** tabs before selecting another tab.

Configure Question Administration

On the question's **Administration** tab, you can manage administrative items around the question including the selected pool, valid dates, weighting, permissions, usage and other question attributes.

To configure the question administration details

1. Go to **Manage Center > Learning > Exam and Question Manager > Questions**.
2. Locate the appropriate question and select **Edit** from the action menu.
3. On the **Administration** screen, review or configure the fields. For detailed information about these fields, please see Question Editor Administration Field Reference.
4. Click **Save**.

Add Media to a Question

In the **Media** tab you can specify images, audio, video or enter HTML to be presented with the question. You can select media files from the LMS repository or enter a URL to external files.

To add media to a question

1. Go to **Manage Center > Learning > Exam and Question Manager > Questions**.
2. Locate the appropriate question and select **Edit** from the action menu.
3. Click the **Media** tab. Here, you can add images, audio, video or other html media to the question.
    - To choose an image, audio or video file from the **Repository Manager**, click the Select file button for the appropriate field and choose the file from the repository. For additional information about working in Repository Manager, please see The Repository Manager.
    - To specify an external image, audio or video file, enter the full URL of the file in the appropriate URL field.
    - To add custom content to the question, enter it in the Other (HTML) text box. To enter HTML, click the **source code** icon.

3. Click **Save**.

Add a Language Bundle to a Question

A language bundle is a collection of localizable fields and language-specific contents in a given language that can be added to various LMS objects. You can add language bundles to questions to deliver the question and answer content in any of the languages for which there is a license in the LMS.

1. Go to **Manage Center > Learning > Exam and Question Manager > Questions**.
2. Locate the appropriate question and select **Manage Language Bundles** from the action menu.
3. Click **+ Add Language Bundle**.
4. Select a language to assign to the question and click **Add**.
5. Select **Edit Bundle Content** from the language bundle's action menu.
6. Enter the question details in the bundle's language.
7. You can update the media associated with a question's language bundle. To do so, click the **Media** tab, and configure the media.
8. Click **Save**.

To delete a language bundle click **Delete** from the language's action menu.

Preview a Question

To preview a question

1. Go to **Manage Center > Learning > Exam and Question Manager > Questions**.
2. Locate the appropriate question and select **Edit** from the action menu.
3. Click the **Preview/Approval** tab.
4. Scroll to the bottom of the tab to preview the question and its reference information.

Clone a Question

You can copy a question and all of its properties by using the Clone feature.

To clone a question

1. Go to **Manage Center > Learning > Exam and Question Manager > Questions**.
2. Locate the appropriate question and select **Clone** from the action menu.
3. Configure or update the question details as necessary.
4. Click **Save**.

View Question Usage Statistics

You can see which exams are using a question and also see the response statistics within a specified date range.

To view question usage statistics

1. Go to **Manage Center > Learning > Exam and Question Manager > Questions.**
2. Locate the appropriate question and select **Edit** from the action menu.
3. Click **Usage Statistics**.
4. To see the response statistics, select a date range and click **Search**. The question and its answer choices are listed with their response count and percentage.

View Question Version Archive

When a question is updated after being approved, the previous version is archived.

To view a question version archive

1. Go to **Manage Center > Learning > Exam and Question Manager > Questions.**
2. Locate the appropriate question and select **Edit** from the action menu.
3. Click **Archive**. Details of all previous versions of the question are shown.

Delete a Question

You can delete only questions that are not currently selected for exams.

To delete a question

1. Go to **Manage Center > Learning > Exam and Question Manager > Questions**.
2. Locate the appropriate question and select **Delete** from the action menu. **Note**: The Delete option is not available if the question has been selected for an exam.
3. Click **OK**. The question is deleted.

Question Import via the Data Loader

Questions can be imported and updated via the Questions CSV Data Loader, allowing questions to be reviewed, approved, rejected or retired offline instead of in the Question Editor. Importing questions via the data loader is useful for adding questions or making updates in bulk. It is also helpful to allow subject matter experts who do not have access to the LMS to review questions and supply answers.

In this topic, we focus on importing question data. For information about creating and managing questions in the Questions Manager, please see Create and Manage Questions.

To import questions you must have read-only or unrestricted access to the *Exam and Question Manager* feature and unrestricted access to the *Data Loader* feature in System Roles (Manage Features > Exam Manager Features).

Download or Export the CSV Import File

You have two options for creating a new CSV Import File.

- **Download the CSV template** - This option will generally be used when you are simply adding new questions.
  1. Go to **Manage Center > Learning > Exam Utilities > Question CSV Loader**.
  2. Download the CSV file template.
- **Export existing questions to a CSV file** - This option is useful if you are making updates to questions, as well as adding new ones. The file is exported in the same format as the CSV template.
  1. Go to **Manage Center > Learning > Exam and Question Manager > Questions**.
  2. If necessary, filter the list of questions to select only those that you need to export.
  3. Click **Export to CSV**. A file named **Questions.csv** is downloaded to your browser's default downloads location.

Prepare the File for Import

Prepare the file for import by entering the necessary values in the fields. Please see Question CSV Loader Field Reference for detailed information about the fields. Or, you can click the **CSV Formatting Help** link for guidance on each field.

Some of the fields are mandatory, depending on if you are adding or updating fields:

- When **creating** a question, the mandatory fields are *Action, Question ID, Question Type, Question* and *Correct Answer*.
- When **updating** a question, the the mandatory fields are *Action* and *Question ID*.

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 CSV File

To import questions via the Question CSV Loader

1. Go to **Manage Center > Learning > Exam Utilities > Question 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. If you are importing new questions, select the permissions to assign to all new questions. Select **Public** to give unrestricted access to users in all organizations in the LMS, or **Private** to give unrestricted access only to the question owner specified in the CSV file.
7. If you are importing new questions, select the default question status.
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 Question 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.

Import a QTI File

You can import IMS Question and Test Interoperability (QTI) files in the Question QTI Loader page. The LMS supports QTI version 1.2 only, and can import multiple choice questions and question pools.

To import QTI files you must have read-only or unrestricted access to the *Exam and Question Manager* feature and unrestricted access to the *Data Loader* feature in System Roles (Manage Features > Exam Manager Features).

The *ident* attribute for each *<item>* tag in the QTI file maps to the LMS question ID and therefore must be unique.

To import QTI files

1. Go to **Manage Center > Learning > Exam Utilities > Question QTI Loader**. The QTI Question Loader page opens.
2. Click **Choose File** and select the file to import.
3. Click **Next**. The LMS validates the QTI file and the QTI Preview page lists the questions in the file.
4. Click **Import**. The QTI Import Summary page opens and lists the import failure or success status for each question.
5. Click **Done** to open the Questions page, or **Import another QTI file** and repeat steps 2 to 4.

Manage Question Approval

Some organizations require question approval. Approvers might be course administrators, instructors or subject matter experts. There are two options for requesting approval, depending on how it is set up for your organization:

- **Simple Mode** - Review of the question is optional. It can be approved in question set up.
- **Approval Mode** - This requires the question to go through an approval workflow.

As the **question owner, or another user with unrestricted access permission**, you can retire the question so that it can no longer be selected for exams. You can also open an approved question for editing. This creates a new version and changes its status back to *Work in Progress*.

As the **question reviewer**, you can mark a question as reviewed or reject it, adding review comments if necessary.

As the **question approver**, you can update the question status to approved, so that it can be selected for exams.

When you approve an edited question that has previously been approved, a new version is created. The previous version of the question is archived.

For more information about the *Question Approval Mode* System Configuration setting, see System Configuration—Exams Category.

Approval Actions

To take approval actions on a question

1. Go to **Manage Center > Learning > Exam and Question Manager > Questions**.
2. Locate the appropriate question and select Edit from the action menu.
3. Click the **Preview/Approval** tab.
4. Take the appropriate action. The table below describes the various actions that can be taken, depending on whether your organization uses Simple Mode or Approval Mode (and in the case of Approval mode, the question's progress through the approval workflow).

Question Status	Action	How

Any	Ask another LMS user who is physically present to approve the question.	Click **Activate Temporary Approver**. A login dialog opens. The approver logs in and then either approves or rejects the question.
Work in Progress	Indicate that the question is ready for review.	Click **Ready for Review**. The question status is updated to *Ready for Review*. The question list in the Exam and Question Manager can be filtered by Status to show questions ready for review.
Work in Progress	Approve your own question.	Click **Approval Override**. The question status is updated to *Approved*. It can now be selected for exams. The *Allow Question Approval Override* feature must be enabled in System Roles (Data Access Control > Role General Permissions).
Ready for Review	Mark question as reviewed.	Click **Review**. The question status is updated to *Reviewed*. The *Allow Question Review* feature must be enabled in System Roles (Data Access Control > Role General Permissions).
Ready for Review	Reject the question.	Click **Reject Question**. The question status reverts to *Work in Progress*. The *Allow Question Review* feature must be enabled in System Roles (Data Access Control > Role General Permissions).
Reviewed	Approve the question.	Click **Approve**. The question status is updated to *Approved* and it can now be selected for exams. The *Allow Question Approval* feature must be enabled in System Roles (Data Access Control > Role General Permissions).

Reviewed	Reject the reviewed question.	Click **Reject Question**. The question status reverts to *Work in Progress*. The question will need to be updated and reviewed again. The *Allow Question Approval* feature must be enabled in System Roles (Data Access Control > Role General Permissions).
Approved	Retire the question.	Click **Retire**. The question can no longer be selected for exams. It will not be used in randomized exam sections.
Approved	Edit the question.	Click **Open for editing**. A comment box is provided to add any relevant comments. Click **OK**. The a new version of the question is created, its version number is increased by one and its status is set to *Work in Progress*. The *Allow Open for Editing* feature must be enabled in System Roles (Data Access Control > Role General Permissions).

External Approval

To access this feature, the user's system role must have the *Is External Approver* Role General Permission enabled in System Roles > Data Access Control.

Reviewers and approvers can mark a question as needing review, adding a comment if required. This feature is available in the **Preview/Approval** tab in both *Approval Mode* and *Simple Mode*, and at any time, regardless of a question's status.

Create and Manage Question Attributes

You can create question attributes to help categorize questions for reporting and to use as criteria for selecting questions for a randomized exam section. Question attributes are exported with other question data when questions are exported to a CSV file, and can be imported via the Question CSV Loader.

> To configure question attributes you must have read-only or unrestricted access to the *Exam and Question Manager* feature and unrestricted access to the *Question Attributes* feature in System Roles (Manage Features > Exam Manager Features).

Create Question Attributes

When you create a question attribute you have to save it before you can add any options for drop-down list items or configure its access permissions.

To create a question attribute

1. Go to **Manage Center > Learning > Exam and Question Manager > Question Attributes**.
2. Click **+ Create Question Attribute**.
3. Enter a value in the **Attribute Code** field.
4. Enter a 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. Select the attribute type.
6. Click **Save**.

Edit Question Attributes

You can change a question attribute's code and display name. You can also add, edit or remove the attribute options.

To edit a question attribute

1. Go to **Manage Center > Learning > Exam and Question Manager > Question Attributes**.
2. Locate the appropriate attribute and select **Edit** from the action menu.

3. Take one of the following actions:
   - Update the code or display name by overriding the existing values.
   - Add, edit or delete attribute properties. Click **Add New Option** to add an option. Click on an existing option to edit it. Click the **Delete** button and select an option to delete.
4. Click **Save**.

Edit Attribute Permissions

> Permissions can also be managed in the Question Attribute editor. Please see the instructions above.

1. Go to **Manage Center > Learning > Exam and Question Manager > Question Attributes**.
2. Locate the appropriate attribute and select **Permissions** from the action menu.
3. Set the permissions as required.
4. Click **Save**.

Delete Question Attributes

Question attributes can only be deleted if they are not being used by an exam.

1. Go to **Manage Center > Learning > Exam and Question Manager > Question Attributes**.
2. Locate the appropriate attribute and select **Delete** from the action menu.
3. Click **OK**.

Add and Manage Exam Pools

Exam pools are used to group related exams. For example, if a course or program has multiple exams, you can group them in a specific exam pool to make it easier to assign them to the appropriate learning modules. Exam pools can have a hierarchical structure, with one or more sub-pools to further categorize content.

To categorize exams using the same structure as a question pool, you can copy the question pool structure to the exam pool. If you do not need separate exams for all the topics in the question pool, you can delete them in the exam pool.

To manage exam pools, you must have unrestricted access to the *Exam Utilities* feature in System Roles (Manage Features > Exam Manager Features).

Add an Exam Pool

You can add an exam pool to group related exams in the Exam Pools Manager. You can add an exam pool at any level in the exam pool hierarchy, subject to having unrestricted access permission to the exam pool or sub-pool you want to add a new pool to.

After adding an exam pool you can update it to specify an automatic exemption policy.

To add an exam pool

1. Go to **Manage Center > Learning > Exam Utilities > Exam Pools Manager**.
2. The page opens with the Level 1 Default Pool already active. You have the following options:
    - To add a sub-pool to the Level 1 Default pool. click the Add button for Pool Level 1.
    - To add a sub-pool to a different Level 1 pool, select it in the Pool Level 1 drop-down field and then click the Add button.
    - To add a sub-pool to another sub-pool, select the appropriate Level 1 pool. This will populate the Pool Level 2 field with its sub-pools. Make the appropriate selection and then click the Add button for Pool Level 2.
3. Enter a name for the new pool and click **Submit**. The new pool is added at the selected level.

Configure Exam Pool Permissions

You can configure permissions for exam pools to specify who can edit them or assign exams to them.

Permissions do not cascade down the hierarchy. For example, administrators with permissions for an exam pool will not have those same permissions for any sub-pools under it. You must configure permissions at each pool level for other administrators to use them.

To configure exam pool permissions

1. Go to **Manage Center > Learning > Exam Utilities > Exam Pools Manager**.
2. Select the appropriate pool or sub-pool.
3. Click **Permissions**.
4. Select the users to give read-only or unrestricted access permissions to.
5. Click **Save**.
6. Click **Close**.

Assign an Automatic Exemption Policy to an Exam Pool

1. Go to **Manage Center > Learning > Exam Utilities > Exam Pools Manager**.
2. Select the appropriate pool or sub-pool.
3. Click **the Update button on the Pool level**.
4. In the Auto-exemption Policy field, select the policy you would like to assign.
5. Click **Submit**.

Delete an Exam Pool

You can delete only exam pools that do not have any exams assigned to them or any their sub-pools. If you want to delete an exam pool that contains exams, delete the exams first, or re-assign them to alternative exam pools. You can then delete the empty pool. When you delete an exam pool, its sub-pools are also deleted.

To delete an exam pool

1. Go to **Manage Center > Learning > Exam Utilities > Exam Pools Manager**.
2. Select the appropriate pool or sub-pool.
3. Click **Delete** for the pool you want to delete. The pool and its sub-pools in the hierarchy are deleted.

Copy an Exam Pool to a Question Pool

You can create new question pool hierarchies by copying exam pools. You can create a question pool hierarchy from any level of an exam pool. The selected pool and its parent and child levels in the hierarchy are created as a question pool with the same structure. If you select a sub-pool level to copy, other pools at the same level (that is, with the same parent pool) are not copied.

To copy an exam pool to a question pool

1. Go to **Manage Center > Learning > Exam Utilities > Exam Pools Manager**.
2. Select the appropriate pool or sub-pool.
3. Click **Copy to question pool**. A question pool is created with the same structure, from exam pool down to the lowest sub-pool level under the copied pool.

Create and Manage Exams

Exams group questions to asses and evaluate learners' understanding of course material. Exams are not assigned directly to users, but are assigned to courses and taken by enrolled participants. They are created and managed in the Exam and Question Manager.

Additional information about exams:

- To create exams with randomly selected questions, but where all candidates taking the same instance of the exam get the same questions, you can configure exams as templates and generate exam instances from them.
- You can configure a disclaimer that participants must agree to before they can start exams.
- Exams can be automatically graded by the LMS. For more information, see About Automatic Grading.
- For offline participation, you can allow exams to be printed and downloaded to the TalentSlate app.

In this topic we focus on managing exams in the Exams manager. For information about importing and updating exams and exam sections in bulk, please see one of the following topics:

- Exam Import via the Data Loader
- Exam Section Import via the Data Loader

To create and manage exams you must have read-only or unrestricted access to the *Exam and Question Manager* feature and unrestricted access to the *Exams* feature in System Roles (Manage Features > Exam Manager Features).

Create an Exam

To create an exam

1. Go to **Manage Center > Learning > Exam and Question Manager > Exams**.
2. Select **Create New Exam** from the *+ Create Exam* drop-down list.
3. Select the appropriate exam pool.

4. Select the exam type:

   - **Standard Exam** - Standard exams are used to test learners' knowledge, gained from either experience or training.
   - **Course Evaluation** - Use course evaluations to get detailed feedback about a course and or its instructors from its participants.
   - **Survey** - Survey exams gather course feedback from participants. Survey exams do not have to be associated with a course. For example, you can use survey exams to ask learners to respond to a poll. Polls can have one single choice question only, which does not need to have a correct answer.
   - **Certification** - Use this exam type to identify exams that can award a certification to candidates who achieve the required minimum score.
   - **Supervisor Assessment** - Use this exam type for supervisor assessments. These are completed by the participant's appraiser, manager or supervisor after they have taken an On-the-Job course. The course is marked as Completed only after the supervisor assessment has been done.

5. Enter a unique ID for the exam. **Note**: The ID can only contain letters, digits, and the characters "-", "_", ".", "@" and "\". It must not contain spaces.
6. Click **Create**. The **Exam Editor** opens at the Details tab.
7. Configure the information in the **Details** tab. For additional information, please see Exam Editor Details Field Reference.
8. Click **Save**.

Add Exam Sections

Exams must include at least one exam section. Exam sections can contain a fixed selection of questions (presented in same order or random order) or questions randomly selected from a question pool, where each exam participant may get a different selection of questions to answer.

To add a section

1. Go to **Manage Center > Learning > Exam and Question Manager > Exams**.
2. Open the appropriate exam.
3. Click the **New Section** button.
4. Configure the new section as appropriate. For additional information, please see Exam Section Properties Field Reference.
5. Click Save.

Add Questions to the Exam

There must be at least one exam section created in order to add questions to an exam.

To add questions to an exam

1. Go to **Manage Center > Learning > Exam and Question Manager > Exams**.
2. Open the appropriate exam.
3. Click the **Add Question** link (located in the left navigation near the bottom of the section).
4. Select a question pool. The selected question pool should contain the questions that you would like to add to the exam.
5. Click **Display Questions**.
6. Select the check boxes of the questions you want to add to the exam section.
7. Click **Add selected questions**. The question pool list is shown again so that you can add more questions from another pool.
8. Repeat these steps to add more questions.
9. Click **Save**.

Manage Points for a Fixed Exam Section

You can manage the maximum score and penalty points for questions in an exam section that uses a fixed selection of questions.

> The maximum score applies to the question as a whole, so multi-answer questions, such as matching questions, will give a fraction of the total for each correct choice. If you enter a non-zero value for penalty points, points will be subtracted for an incorrect answer or each incorrect part of an answer.

To update points awarded in fixed exam sections

1. Go to **Manage Center > Learning > Exam and Question Manager > Exams**.
2. Open the appropriate exam.
3. Select the appropriate section. It must be a fixed section.
4. Click **Select questions**. The questions are listed in the main Exam Editor window.
5. Enter the maximum score and penalty points for each question and click **Update points**.

Configure Exam PDF Print Properties

If candidates are allowed to download an exam as a PDF, you can configure several of its attributes and its availability for download between specified dates.

> The exam printing properties in the Print Properties tab relate to exams downloaded as PDFs and exams, answer sheets and cover pages printed to PDFs from the Generate Instance page. The cover sheet can only be printed for a generated instance.

To configure print properties for downloaded exam PDFs

1. Go to **Manage Center > Learning > Exam and Question Manager > Exams**.
2. Open the appropriate exam.
3. To select a cover sheet for generated instances printed to PDF, click the **browse** icon. The Repository Manager opens.
4. Enter a heading for the first page of the PDF.
5. To add labels *A*, *B*, *C* and so on next to single and multiple choice questions, select **Yes** from the drop-down list.
6. Enter the percentage difference needed when a candidate retakes the exam.
7. Select the dates for when the exam and its answer sheet are available for download.
8. Click Save.

Configure Exam Security

Several layers of security can be assigned to restrict an exam's availability to learners and supervisors. For example, if you choose *Assignment Access Code* for the enrollment type, candidates must enter the code to launch the exam. You could embed this in content they are required to read, and provide instructions in the exam's reference information (entered in the Details tab).

You can restrict access by enrollment and by IP address range. You can also use the IP address range to restrict participants and reviewers reviewing completed exams.

To configure exam security

1. Go to **Manage Center > Learning > Exam and Question Manager > Exams**.
2. Open the appropriate exam.
3. To change the exam owner, click the **browse** icon. A user selector dialog opens.
4. To configure access permissions for the exam in the Manage Center, click **Permissions**.
5. Select the enrollment type.
6. To restrict access by IP address ranges, enter the low and high values for each range.
7. To use the IP address range restriction for participants to review their own detailed exam results, select the **Participants** check box.

8. To use the IP address range restriction for reviewers to review participants' detailed exam results, select the **Reviewers** check box.
9. Click Save.

Add a Language Bundle to an Exam

A language bundle is a collection of localizable fields and language-specific contents in a given language that can be added to various LMS objects. You can add language bundles to exams to provide the exam title, description, the title and description for each section, and the print heading and cover sheet for printed exams in any of the languages for which there is a license in the LMS.

1. Go to **Manage Center > Learning > Exam and Question Manager > Exams**.
2. Locate the appropriate exam and select Manage Language Bundles from the exam's action menu.
3. Click **+ Add Language Bundle**.
4. Select a language to assign to the exam.
5. Enter the exam title in the new language.
6. Click **Add**. The new language bundle is added to the list.

Note: You can delete exam language bundles only if the exam they were created for has not been attempted.

Delete an Exam

Exams that have no active participants can be deleted.

To delete an exam

1. Go to **Manage Center > Learning > Exam and Question Manager > Exams**.
2. It is a good practice to first check for participants who have started, but not completed, the exam before attempting to delete. To do this, open the appropriate exam and click on the Participants icon.
3. To delete a single exam, select **Delete** from the action menu of the exam you want to delete. To delete multiple exams, select their check boxes and then select **Delete** from the Bulk Actions menu. You are asked to confirm the deletion.
4. Click **OK**.

Exam Import via the Data Loader

In this topic, we focus on importing exams in bulk. For information about managing exams individually in the Exams Manager, please see Configure and Manage Exams.

> To import exam data, you must have unrestricted access to the Exam Utilities feature in System Roles (Manage Features > Exam Manager Features).

Create the CSV Import File

Begin by downloading the CSV import file template.

1. **Go to Manage Center > Learning > Exam Utilities > Exam CSV Loader**.
2. Click Download CSV file template. The template will be saved to your local system.

Prepare the File for Import

Once you have downloaded the CSV import file, you prepare it for import by entering the necessary values in the fields. Please see Exam Data Loader Field Reference for detailed information about the fields.

Import the CSV File

To add or update exam data via the Exam Data Loader

1. Go to **Manage Center > Learning > Exam Utilities > Exam 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 so that you can review the data before importing the file.
7. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
8. If any records failed to import, you can go back to the Exam Data 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.

Exam Section Import via the Data Loader

In this topic, we focus on importing exam sections in bulk. For information about managing exam sections individually in the Exams Manager, please see Configure and Manage Exams.

> To import exam section data you must have unrestricted access to the Exam Utilities feature in System Roles (Manage Features > Exam Manager Features).

Create the CSV Import File

1. **Go to Manage Center > Learning > Exam Utilities > Exam Section CSV Loader**.
2. Click **Download CSV file template**. The template will be saved to your local system.

Prepare the File for Import

Once you have downloaded the CSV import file, you prepare it for import by entering the necessary values in the fields. Please see Exam Section CSV Loader Field Reference for detailed information about the fields.

Import the CSV File

To add exam section data via the Exam Data Loader

1. Go to **Manage Center > Learning > Exam Utilities > Exam Section 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 Section Data Loader page so that you can review the data before importing the file.
7. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.
8. If any records failed to import, you can go back to the Exam Section Data 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.

Generate an Exam Module

You can generate an exam as a standalone learning module and allow learners to enroll in it as if it were a course. You can generate an exam module from any exam saved as a template.

> To save an exam as a template, enable the "Is a Template" setting in the exam details. For additional information, please see Exam Editor Details Field Reference.

When you generate an exam as a module you must specify start and end dates for its availability. Generated exams have the same name as their template but a new ID.

If you do not yet have start and end dates for the exam, instead of generating it as a module, you can import it as a resource (**Manage Center > Learning > Import resource**).

To generate an exam module

1. Go to **Manage Center > Learning > Exam and Questions Manager > Exams**.
2. Select **Generate Exam Module** from the *+ Create Exam* drop-down list.
3. Select the Exam Pool containing the exam you want to generate.
4. Select the Exam template from the drop-down list. (This list shows only exams marked as templates.)
5. Select the Enrollment Type. You can change the enrollment type in the Security tab in the Exam Editor.
6. Select the start and end dates for the exam's availability to learners.
7. Click **Generate**. A dialog opens to tell you if the exam was successfully generated.
8. Click **Edit Exam** to update the exam details, or **Open Catalog Editor** to configure the learning module.

Manage Exam Themes

Exam themes are style sheets (CSS files) that define the appearance of exams. You can add and delete style sheets, and select the style sheet used by exams. You manage exam themes in the Exam Style Sheet List page.

> To manage exam themes you must have unrestricted access to the *Exam Configuration* feature in System Roles (Manage Features > Exam Manager Features). Additionally, at least read-only access to the *Exams* feature is needed to access the Exam Style Sheet List page from the Exams page.

To manage exam themes

1. Go to **Manage Center > Learning > Exam Utilities > Exam Style Sheet Editor**.
2. Take on of the following actions:
   - To change the style sheet used by exams, select one from the Style Sheet Name drop-down list.
   - To change the name of the selected style sheet, enter the new name in the New Name field and click **Update selection.**
   - To select a different CSS file for the selected style sheet, click **Select** to open the Repository Manager, select the CSS file and then click **Update selection.**
   - To create a new exam style sheet, enter a name in the New Name field, click **Select** to select the CSS file, and then click **Add.**
   - To delete the selected style sheet, click **Delete selection.**

Migrate Exam ID

Administrators can migrate an Exam ID via Migrate Exam ID. All records associated with the Exam will be migrated to the new ID. You can migrate individual Exam IDs only.

Migrating the Exam ID changes the learning object ID (display ID).

> To migrate Exam IDs, your user role must have unrestricted access to the Migrate Exam ID features in System Roles (Manage Features > Exam Manager Features).

To migrate an Exam ID

1. Go to **Manage > Learning > Exam and Question Manager > Migrate Exam ID**.
2. Click the ellipses to the right of the Existing Exam ID field.
3. Select the Exam ID of the exam you would like to migrate.
4. Click **OK**.
5. Enter a new unique ID for the exam in the New Exam ID field. Remember not to include any special characters or spaces in the ID.
6. Click **Execute**.

Configure and Manage Automatic Exemption Policies

PeopleFluent Learning allows you to automatically exempt learners from specific training because they have achieved a minimum score on an exam. Meaning, the knowledge they have demonstrated through their exam score means that they do not need to take related training to gain that knowledge. These policies define the parameters for automatic exemption.

There are three steps to configure automatic exemptions:

1. Question pool: select the program or module sessions that qualify for automatic exemption for a question pool.
2. Automatic exemption policy: specify the minimum number of questions and score for questions in the question pool.
3. Exam pool: assign the policy to an exam pool.

When you assign program or module sessions for automatic exemption to a question pool, if the participant achieves a minimum score for questions drawn from the pool (and other pools, depending on the policy configuration), their transcript is updated in one of the following ways:

- They are awarded with an Waiver/Exempt transcript for each of the selected courses for which they do not already have any previous enrollment.
- If they already have an active enrollment, the transcript status is updated to Waiver/Exempt.

When you apply an automatic exemption policy to an exam pool, all exams within that pool containing questions from the specified question pools for the policy will utilize it. This policy determines whether participants' transcripts for the associated courses are marked with a Waiver/Exception status or updated accordingly.

To configure automatic exemption policies you must have unrestricted access to the *Automatic Exemption Policies* feature in System Roles (Manage Features > Exam Manager Features). Unrestricted access is also required for the *Exams* feature to assign a policy to an exam.

Create an Automatic Exemption Policy

You can create an automatic exemption policy for one or more program or module sessions which have been selected for automatic exemption in one or more question pools. You can then assign the automatic exemption policy to an exam pool.

To create an automatic exemption policy

1. Go to **Manage Center > Learning > Exam and Question Manager > Automatic Exemption Policies**.

2. Click **+ Create New Policy**.
3. Enter a unique policy code and a name.
4. Click **+ Add Program/Module Session**.
5. The selector page displays learning modules that have been selected for automatic exemption in a question pool. Choose or more of these modules.
6. Click **OK** A row for each program or module session is added to the list in the Create Automatic Exemption Policy page.
7. To switch on automatic exemption for an eligible question pool for this policy, select **Enabled** from the Auto-Exemption Required column. The criteria for automatic exemption are shown.
8. Enter the minimum number of questions from the question pool that the participant must answer, and the minimum percentage score they must achieve.
9. Repeat steps 4 to 7 for each program or module session you want to include in the policy.
10. Click **Save**.

For information about assigning an Automatic Exemption Policy to an Exam Pool, please see Configure and Manage Exam Pools.

Edit an Automatic Exemption Policy

You can edit an automatic exemption policy to:

- Update the policy's reference and name
- Add more program or module sessions
- Delete program or module sessions from the policy
- Enable or disable eligible question pools
- Update the minimum questions and score for participants taking an eligible exam

To edit an automatic exemption policy

1. Go to **Manage Center > Learning > Exam and Question Manager > Automatic Exemption Policies**.
2. Click the name of the policy you want to update.
3. Make the updates as necessary.
4. Click **Save**.

Delete an Automatic Exemption Policy

You can delete automatic exemption policies that are not assigned to an exam pools.

To delete an automatic exemption policy

1. Go to **Manage Center > Learning > Exam and Question Manager > Automatic Exemption Policies**.
2. Locate the appropriate policy and select Delete from the action menu.
3. Click **OK**.

Pool General Properties Field Descriptions

The table below describes the general properties for question pools. The default values configured for the pool are applied to new questions added to the pool. You can override these default settings when creating or editing each question.

Property	Description
Default Question Prefix	When you create a new question in the question pool, this is the default prefix for the question ID, which is followed by the question's sequence number.
Default Weight	The default value for the maximum number of points that can be awarded when questions in the pool are delivered in a randomized test selection.
Default Difficulty	The default level of difficulty applied to the questions in the pool. You could set up different pools for different levels of difficulty.
Default Usage Limit	The default usage limit, which specifies how many times the question can be used in exams.

Question Pools Data Loader Field Reference

Use the reference table below to help you correctly format the question pools you want to import via the Question Pools Data Loader.

Field	Content	Data Handling
Action	Action	Must be "A", "D", "U", or "AU" (Add, Delete, Update, Add or Update as appropriate)
Level 1 Name	Question Pool Level 1 Name	Any Text (Max field length:150)
Level 2 Name	Question Pool Level 2 Name	Any Text (Max field length:150)
Level 3 Name	Question Pool Level 3 Name	Any Text (Max field length:150)
Level 4 Name	Question Pool Level 4 Name	Any Text (Max field length:150)
Default Question Prefix	Default Question Prefix	Any Text (Max field length:50)
Default Weight	Question Pool Default Weight	Weight must be numeric and should between 0 and 999999
Default Difficulty	Question Pool Default Difficulty	Difficulty must be numeric and should between 0 and 999999
Default Usage Limit	Question Pool Default Usage Limit	Default Usage Limit must be integer and should between 0 and 2147483647
Reminder Recipients	Reminder recipient user ids	List of user IDs, separated by vertical bar ("|"), e.g. userid1|userid2|userid3. The user ID is normally the username. However, if multiple assignments are allowed in the system, then the user ID is the assignment reference code
Frequency	Question Pool Frequency	A frequency must be one value of daily|weekly|biweekly|monthly

Permission Template Name	Source name of a question pool from which to copy permissions, with hierarchical level names separated by forward slash, e.g., level1name/ level2name/ level3name	Any Text
Permission Replace	Permission Replace	"Y" or "N"

Configure Details Specific to Question Types

In the Details tab you enter the question, its parameters—and for applicable question types—its correct answer or answers.

Field	Description
Question ID	The unique question ID either manually entered or generated by the LMS. If a common ID prefix has been configured for the question pool the question is created in, the question ID starts with the prefix. You can override the prefix when creating questions.
Version	Shows the question's version number. If a question was created with the *Question Approval Mode* System Configuration setting set to *Approval Mode*, the question's version number is increased when the question is re-opened for editing and the new version is approved. Previous versions are shown in the Archive tab.
Status	When the *Question Approval Mode* System Configuration setting is set to *Simple Mode*, you or anyone with unrestricted access permission for the question can update its status to reflect whether it is ready to be included in exams. Only questions with an *Active* status can be included in exams. When set to *Approval Mode*, the Status is read-only, and is updated as the question progresses through the approval workflow. Only questions with an *Approved* status can be included in exams.
Language	Select the language in which the question is delivered.
Reference Info	Enter any relevant reference information about the question. This information is shown below the question when the participant takes the an exam containing the question. It is also shown when you preview an exam in the Exam Editor.
Prioritize when selecting questions for random exam sections	Select this check box to ensure the question is included in randomly generated exam sections that draw questions from its question pool.
Text	Enter the text of the question.

Always show choices in the same order?	This option applies to single and multiple choice questions. Select **Yes** or **No** from the drop-down list.
Allow only one answer?	This option applies to multiple choice questions. Select **Yes** if the participant needs to select only one of several possible correct answers. Select **No** if they must select all correct answers.
Choice#*n*	This option applies to single and multiple choice questions. Enter the choice text for each option and select the correct answer.
Enable Question Attachment	Select this check box to enable the *+ Add attachment link* button when the question is selected for an exam.
Hints	Click **Display additional comments** to show this field. Enter a hint to help the participant answer the question.
Pre-Comment	Click **Display additional comments** to show this field.
Explanation	Click **Display additional comments** to show this field.

Question Editor Administration Field Reference

In the Administration tab you can:

- Move the question to another pool
- Set an expiry date, after which it cannot be included in exams
- Limit the number of times it can be used
- Adjust its weighting and difficulty for randomized exam sections
- Update its access permissions
- Update the values for any question attributes

Table: Question Editor—Administration Tab Field Descriptions

Field	Description
Question Pool Level *n*	You can select the question pool level to assign the question to. Remember that question pools have their own access permissions.
Expiration Date	Enter an expiration date and time for the question, after which the question cannot be selected for exams.
Usage Limit Threshold	Enter the maximum number of times the question can be selected for exams. A daily background task will automatically update the question's status to *Retired* when the threshold has been reached.
Weighting	Enter the maximum number of points that can be awarded when the question is delivered in a randomized exam section.
Difficulty	Enter the question's difficulty level. You can filter the list of questions in the Exam and Question Manager by difficulty.
Comments	Enter a comment about the question. Exam participants do not see them comment.
Owner	Click the **browse** icon to change the question's owner. A question can have only one owner, and only the owner can edit the question.
Permissions	Click **Permissions** to update the access permissions for the question.

Question CSV Loader Field Reference

Use the reference table below to help you correctly format the question data you want to import via the Question CSV Loader.

Administrators with read-only or unrestricted access to the *Exam and Question Manager* feature and unrestricted access to the *Data Loader* feature in System Roles (Manage Features > Exam Manager Features) can import questions.

If question attributes have been defined, they are added to the end of the CSV file and prefixed with *QT-*.

Table: Question CSV Loader Field Reference

Field	Content	Data Handling
Action	Action	*A* for Add or *U* for Update
Question ID	Question ID	A unique ID that conforms to PeopleFluent LMS ID constraints. (Max field length: 85 characters)
Question type	Question type	Must be one of: • *SC* (Single Choice) • *MC* (Multiple Choice) • *TF* (True or False) • *ES* (Essay) • *FB* (Fill in the Blank) • *RA* (Rating) • *MA* (Matching) • *TR* (Triple Rating) You cannot import Drag-and-Drop or Hotspot questions.
Question	Question text	Any text.
Hints	Hint text	Any text.
Pre-Comment	Pre-comment text	Any text.

Explanation	Explanation text	Any text.
Image URL	Absolute or relative URL	A valid URL for an image file. For example, http://www.abc.com/q1_diagram.png or /ekp/nd/fresco/repository/`q1_diagram.png`. URLs can be a maximum of 255 characters in length, and must be accessible by the LMS without any additional authorization, such as Single Sign-On (SSO) authorization. The import process skips records with invalid URLs and generates an error report.
Audio URL	Absolute or relative URL	A valid URL for an audio file. For example, http://www.abc.com/q1_soundclip.wav or /ekp/nd/fresco/repository/`q1_soundclip.wav`. URLs can be a maximum of 255 characters in length, and must be accessible by the LMS without any additional authorization, such as Single Sign-On (SSO) authorization. The import process skips records with invalid URLs and generates an error report.
Video URL	Absolute or relative URL	A valid URL for a video file. For example, http://www.abc.com/q1_videoclip.mp4 or /ekp/nd/fresco/repository/`q1_videoclip.mp4`. URLs can be a maximum of 255 characters in length, and must be accessible by the LMS without any additional authorization, such as Single Sign-On (SSO) authorization. The import process skips records with invalid URLs and generates an error report.
Other (HTML)	Text or valid HTML	Any text or valid HTML.

CorrectAnswer	Correct Answer	The format of the correct answer varies by question type: • SC: the number of the correct choice • MC: all correct choice numbers, separated by | (for example, 2|5|6) • TF: F, f, T, t, False, false, True or true • ES: no correct answer expected for essay questions; leave this field blank • FB: the text (word or words) the participant must match • RA: enter a number between 1 to 10 to use for the spread. Enter the label for the lowest value in Choice1 and the label for the highest value in Choice2. • MA: leave this field blank for Matching questions. Enter matching choices in consecutive Choice fields. For example, Choice1 matches Choice2, Choice 3 matches Choice4 and so on. • TR: enter a number between 1 to 10 to use for the spread. Enter the label for the lowest value in Choice1 and the label for the highest value in Choice2. Enter the column headings in Choice3, Choice4 and Choice5. Enter up to 10 item (row) labels in Choice6 to Choice15.
Choice1 - Choice20	Choice 1 to Choice 20	Any text.

Question Status	Question status	One of: • *ACT* (Active) • *WIP* (Work in Progress) • *URE* (Under Review) • *RET* (Retired) • *APP* (Approved) • *REV* (Reviewed)
Version	number	Any integer. Note: When updating a question on a system with Approval Mode enbled, the Version column must be either blank or one integer higher than the current active/approved version of the question in order to increment the version.
Writer	Question writer	A valid LMS user name.
Reviewer	Question reviewer	A valid LMS user name.
Approver	Question approver	A valid LMS user name.
Weighting	Question weighting for questions selected for randomized exam sections	A decimal number (for example, 1.5, 2.0, 3.7).
Reference	Reference info	Any text.
UsageCount	Current usage total	Any integer.
ShuffleChoices	Always show choices in same order?	Enter Y to always present answer choices in the same order, or N to show them in a random order.
Comment	Administration comments	Any text. Comments are not shown to exam participants. (Max field length: 512 characters)

ExpiryDate	Question expiry date	The expiry date must be formatted as dd-MMM-yy HH:mm, where hour is in 24-hour format.
ExpiryTimezone	Expiry date timezone	Standard timezone ID (for example, America/Los_Angeles, US/Eastern, Etc/Greenwich).
PrimaryLanguage	Language	ISO 2-char codes (for example, en_US, fr_CA, es_ES).
Question Pool Level 1	Name of the Level 1 question pool to which this question belongs	The pool name must match the name of an existing question pool exactly or a new pool will be created.
Question Pool Level 2	Name of the Level 2 question pool to which this question belongs	The pool name must match the name of an existing sub-pool of the question pool specified in Question Pool Level 1 exactly or a new sub-pool will be created.
Question Pool Level 3	Name of the Level 2 question pool to which this question belongs	The pool name must match the name of an existing sub-pool of the question pool specified in Question Pool Level 3 exactly or a new sub-pool will be created.
Read Permission Template	Read Permission Template Code	Enter the code of the template to use for read permissions. (max. 85 characters).
Write Permission Template	Write Permission Template Code	Set write permissions by specifying the User Targeting Template Code (max. 85 characters).

AssignReadTemplate	User Targeting Template Action	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	User Targeting Template Action	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.
CT-*AttributeCode*	Value for question attribute with specified attribute code	Any Text (Max field length:2,000). Enter `*NONE*` to clear.

About Automatic Grading

Exam questions can be worth a specific number of points, which can vary between questions. The default number of points awarded to each new question is 1. In the Question Editor you can update the *weighting*, which is the number of points awarded for the question when it is selected by a randomized exam section. For exam sections that use a random selection of questions, you can use the questions' specific weightings or override them so they all use a weighting of 1 for particular exam you are configuring. For exam sections that use a fixed selection of questions, you can update the points awarded for each question when you select questions in the Exam Editor.

Not all question types can be automatically graded. If an automatically graded exam contains essay questions, no points are assigned during automatic grading. This point assignment is left to an instructor during exam review.

Multiple Choice Questions

The LMS natively provides two ways of automatically grading multiple choice questions with multiple correct answers:

- All or Nothing
- Uniform Partial Credit

You can select the method to use, which applies to all exams, in the *Grading for Multiple Choice Questions* System Configuration setting.

With All or Nothing enabled, automatic grading awards either zero or full points, depending on whether the participant answered the question exactly as required.

With Uniform Partial Credit enabled:

- Automatic grading awards a fraction of the points for each choice response, where each correct choice is worth a fraction of the total points available for the question.
- If a question is unanswered (that is, no choices checked), zero points are awarded.
- If all choices are selected when only some are correct, the LMS assumes the user is guessing and zero points are awarded. If all choices are required for the correct answer then full points are awarded.
- If no correct choices are selected, zero points are awarded.

Where a multiple choice question has five answers, A to E, and answers A and B are correct, the table below shows how points are awarded for different answer combinations.

If penalty points are configured for an exam question, each incorrect choice within that question is proportionally penalized. For the overall result, a question will always return a value that is between 0 and the full weight. In the example below, no penalty points are configured for the question.

Table: Points Awarded for Multiple Choice Answer Combinations

Participant's Answer	Points Awarded (All or Nothing)	Points Awarded (Uniform Partial Credit)	Percentage of Answer that was wrong
A, B	1 (100%)	1 (100%)	0
A, B, C	0	0.8 (80%)	20% (1 of the 5 check boxes)
A	0	0.8 (80%)	20% (1 of the 5 check boxes)
A, D	0	0.6 (60%)	40% (2 of the 5 check boxes)
C, D	0	0	100% (All 5 check boxes)

Exam Editor Details Field Reference

In the Exam Editor Details tab, you configure the exam properties, such as how it is presented, graded and reviewed. The Details tab separates the exam's properties into the following sections:

- Title, description, language, template
- Presentation
- Grading
- Review
- Availability
- Email notifications

Field	Description
Title	Enter the exam title.
Description	Enter a description of the exam. This description is shown to learners when they open the exam (from the Knowledge Center, for example), along with any time limits, the number of attempts allowed, and the minimum passing score, if specified.
Post Exam Information	Enter a message to be displayed to users when they have completed an exam. This can be used to provide feedback or further instructions to the learner. **Important:** The text displayed on the Exam Results screen will be the same for all users, regardless of if they pass or fail the exam.
Language	Select the language in which the exam information is delivered.
Is a Template?	Select this check box to allow the exam to b e generated as a learning module. (You can generate exam modules from the Exams page.)
Allow Section/ Question Navigation	Select this check box to allow candidates to move between questions or sections at will, before they have answered the questions. Candidates will be able to work through the exam in any order before submitting it as completed.
Display Question ID	Select this check box to show the question ID along with the question number.

Disable mouse right click	Select this check box to disable right-click functionality, which will prevent the exam from being printed from the browser.
Colors and Fonts	Select an exam theme from the drop-down list. Themes use a stylesheet to define the colors and fonts used for exams.
Remaining Time	Select the way the exam is timed. This can be measured as a fixed amount of time from the time the exam is first launched, or the amount of time spent on the exam (that is, when the exam is active).
Maximum Time Allowed (hh:mm)	Enter the maximum time allowed to complete the exam. If the Remaining Time option is set to Elapsed Time, this will indicate a hard deadline—a date and time beyond which the participant will not be able to open the exam. If the Remaining Time option is set to Exam Time, this is the maximum amount of time the participant is allowed to spend in the exam. Enter 00:00 to give candidates unlimited time.
Maximum Time per Question (seconds)	Enter the maximum amount of time in seconds that candidates are allowed to spend on each question. Enter 0 to give candidates unlimited time.
Automatically Grade?	Select **Yes** to automatically grade the exam. For more information, see About Automatic Grading. Select **No** if an instructor will mark all questions in the exam. If an automatically graded exam contains essay questions, no points are assigned during automatic grading. The instructor will need to mark essay questions during exam review.
Maximum Number of Attempts for Each Participant	Enter the maximum number of times each participant is allowed to attempt the exam, up to a maximum of 9999.
Marking type	Select whether the exam score is measured in points or as a percentage.
Required Number of Points/Percentage	Enter the number of points or percentage score needed for the participant to pass the exam.

Maximum Number of Points	Enter the maximum number of points.
Grading for Multiple Choice Questions	This setting allows you to override the System setting that determines if partial credit ca be given for multiple choice questions. Select Use the System Configuration to respect the organization-level setting. Or, click Use this setting for this exam and select an option to override the System setting on the exam level.
Allow hints	Select **Yes** to include a Hint link with the question. If candidates click the link, the hint defined for the question is shown in a popup window.
Show number of marks for each question	Select **Yes** to show the maximum number of marks available for each question.
Pool Summary Level	Performance feedback at the end of each exam is grouped by question pools at the specified level. Select the question pool level under which to summarize performance by area in the Exam Summary page. The default value is specified in the *Default Pool Summary Level* System Configuration setting.
Allow participant review	Select an option to allow or disallow candidates to review their exams after completion.
Participant can review	Select an option to allow candidates to see their correct or incorrect answers, and whether to show the correct answers.
Display score	Select this check box to show the participant their score after the exam has been completed and graded.
Reviewer Permissions	Click **Reviewer Permissions** to configure access permissions for reviewing the exam. For example, examiners will need permission to see and grade essay questions.
After each page of questions	Select an option to determine what happens when a participant clicks *Submit response* at the end of each section.

Check for missing answer(s) before continuing to the next page	This setting allows you to override the System setting that determines if users can skip questions for the exam. Select Use the System Configuration to respect the organization-level setting. Or, click Use this setting for this exam and select an option to override the System setting on the exam level.
Availability Properties	Select the check boxes to configure the availability of the exam to candidates. Allowing candidates to print exams provides a Print button before they start the exam. Candidates can print to printer or to a downloadable PDF. Allow unlimited printing of exams lets users print the exam multiple times vs. one time if this setting is not enabled. Candidates can download exams that contain single choice, multiple choice and true/false questions only. They cannot download an exams that have IP filtering or contain invalid media paths in any questions. If you select Disallow abandonment of a resumed exam, candidates can leave incomplete exams (and resume them) only once. Record Post-Completion Attempts enables recording the attempts in the appropriate database tables (testinstance, testquestion#, etc.). Record Post-Completion Higher Score allows the exam score to be updated if the post-completion attempt has a higher score, but would not update if the attempt has a lower score. While this checkbox could be selected without the other setting in the exam editor, a higher score will not be recorded if the attempt itself is not recorded.
Email Notification	Select the email templates to use when a participant fails an exam, and for when they can retake a failed exam.

Exam Section Properties Field Reference

When you create an exam you must create at least one section in it so that you can add questions to it. The table below describes section properties.

Field	Description
Title	Enter the section title.
Description	Enter a brief description of the section, up to a maximum of 255 characters.
Question List Selection	Select an option to specify how questions can be added to the section: • **Select specific questions**: you can manually select the questions to add to this section. • **Generate random questions**: you can select the number of questions from a question pool and its sub-pools which will be randomly selected each time the exam is launched.
Randomize fixed question list within question pools	When specific questions are selected for the section, to randomize the order of questions each time the exam is launched, select this check box.
Weighting of Questions	This option is only available when you select the Generate random questions option from the Question List Selection. Select an option: • Use the weights defined for the questions (which may be different) • Use the same weighting of 1 for all questions randomly selected for the exam section.

Question Delivery Style	Select an option for how multiple questions are presented to candidates in the exam section: • Multiple Question per Page • Sequential, Single Question per Page If you select *Sequential, Single Question per Page*, you can optionally set a time limit. This can be a section-specific time limit you enter here, or you can use the question time limit specified at the exam level (in the Details tab).
Marking type	Select the marking type for scoring the questions. You can mark the questions either by points or by percentage.
Required Number of Points/Percentage	Enter the number of points or the percentage needed to pass this section of the exam.
Time Limit (min.)	Enter the time limit in minutes for answering all the questions in a section.
Only draw questions with the following attribute(s)	If question attributes have been created, and your user account has been given access permission for them, they appear at the end of the Section Properties page. For sections with a random question selection, you can specify the criteria for question selection by only selecting questions that have the question attribute values selected here. Select the check boxes of one or more attribute values to restrict the questions chosen to only those with the same values. If the pool level does not have enough questions with the specified attribute value then the exam will not launch and an error message will be shown.

Exam Section Data Loader Field Reference

Field	Content	Data Handling
ExamID	An existing Exam ID	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 85 characters)
TimeLimit	Time Limit (min.)	Any Positive Whole Number
LayoutType	Questions per Page	Must be one of 1 - Sequential, Single Question per Page 3 - Multiple Questions per Page
SectionType	Question List Selection/Section Type	Must be one of: 1 - Fixed Question List / Select specific questions/ 2 - Random Question Generation / Generate random questions
RequiredPoints	Required Number of Points	Any Positive Whole Number
MaxPoints	Maximum Number of Points	Any Positive Whole Number
Title	Title	Any Text (Max field length:255)
Description	Description	Any Text (Max field length:None)
QuestionDeliveryStyle	Question Delivery Style	Must be one of: 0 -Standard Section 1 -Instructor Evaluation Section
MarkType	Marking type	Must be one of: M -Point P -% (percentage)

RandomizeFixedQuestionList	Randominzed fixed question list within question pools (for fixed question sections only)	"Y" or "N"
Weighting	Weighting of Questions (For Random Question section only)	Must be one of: Q - Use weights as defined in the Question Editor at the time of starting exam S - Same weight for all questions
MaxTimePerQuestion	Maximum Time per Question (seconds)	Any Positive Whole Number
MaxTimePerQuestionType	Time limit for Sequential delivery style	Must be one of: -1 - Not Apply 0 - No time limit 1 - Maximum Time per Question 2 - Use Maximum Time per Question as defined in Exam Template Editor
LastUpdated	LastUpdated	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.

Exam Data Loader Field Reference

Use the reference table below to help you correctly format exam data you want to import via the Exam Data Loader.

Field	Content	Data Handling
ExamID	Unique Identifier for the exam	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 85 characters)
AutoGrade	Automatically Grade?	"Y" or "N"
AttemptLimit	Maximum Number of Attempts for Each Participant	Any Positive Whole Number
Participant Review	Allow participant review	Must be one of: Y - Always P - If Passed N - Never
AllowHints	Allow hints?	"Y" or "N"
DateEntered	Date and time record is created	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.
RequiredPoints	Required Number of Points	Any Positive Whole Number
Description	Description	Any Text (Max field length:None)
Stylesheet	Colors and Fonts	Existing style sheet name
ExamType	Exam type	Must be one of: 0 - Standard Exam 1 - Survey 3 - Course Evaluation 4 - Certification 5 - Skills Exam 6 - Supervisor Assessment
MaxTimeAllowed	Maximum Time Allowed	Must be in the format HH:mm, e.g., 10:10 denotes 10 hour and 10 minutes. Applicable for gradeable exam types only (i.e. Standard Exam, Certification, Skills Exam)
ValidFrom	Not available before	Must be in the format yyyy-MM-dd HH:mm (mm is at intervals of 30mins), e.g., 2010-08-25 13:00 denotes August 25, 2010, 1:00 p.m.

ValidTo	Not available after	Must be in the format yyyy-MM-dd HH:mm (mm is at intervals of 30mins), e.g., 2010-08-25 13:00 denotes August 25, 2010, 1:00 p.m.
AllowPrint	Allow candidates to print exams	"Y" or "N"
AllowResume	Allow candidates to resume incomplete attempts	"Y" or "N"
MinimumRetakeIntervalAmount	Participants cannot retake exam within(amount field)	Any Positive Whole Number Applicable when system license is not Exam only
MinimumRetakeIntervalUnit	Participants cannot retake exam within(unit field)	Must be one of: D - Day W - Week M - Month Y - Year Applicable when system license is not Exam only
AllowScoreDisplay	Display score	"Y" or "N"
AllowNavigation	Allow Section/Question Navigation	"Y" or "N"
AllowQuestionIdDisplay	Display question ID	"Y" or "N"
DisallowAbandon	Disallow abandonment of a resumed exam?	"Y" or "N"
IsTemplate	Is a Template?	"Y" or "N"
ReviewQuestion	After each page of questions	Must be one of: NOREVIEW - Just continue to the next page ANSWERCORRECT - Mark answers "correct" or "incorrect", then continue to the next page REVIEWNOTFORCE - Show the correct responses, then continue to the next page REVIEWFORCE -Show the candidate's responses, then redeliver the questions if any of the responses were incorrect
MarkType	Marking type	Must be one of: M - Point P - % (percentage)
ShowMark	Show number of marks for each question	"Y" or "N"

ReviewType	Participant can review	Must be one of : A - All C - Correct answers I - Incorrect answers O - Incorrect answers only
MaxTimePerQuestion	Maximum Time per Question (seconds)	Any Positive Whole Number
PoolSummaryLevel	Pool Summary Level	0-7
AllowDownload	Allow download	"Y" or "N"
DisableMouseRightClick	Disable mouse right click	"Y" or "N"
LastUpdated	Last Updated	Must be in the format yyyy-MM-dd-HH:mm:ss, e.g., 2010-08-25 13:00:00 denotes August 25, 2010, 1:00 p.m.
ExamPool	An existing Exam Pool	A complete exam pool path, forward slash-delimited("/")
RecordPostCompletionAttempts	Enable recording the attempts	"Y" or "N"
RecordPostCompletionHigherScore	Allow the exam score to be updated if the post-completion attempt has a higher score, but would not update if the attempt has a lower score. (While this setting could be enabled without the RecordPostCompletionAttempts setting, a higher score cannot be recorded if the attempt itself is not recorded.)	"Y" or "N"
PostExamInfo	Post exam information, which will be presented to learners when they complete an exam	Any Text (Max field length:None)

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.

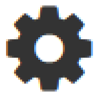
Additional Information

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

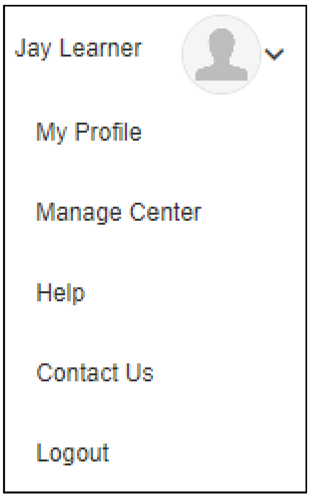
You can configure the options for drop-down list attributes.

Table: Attribute option fields

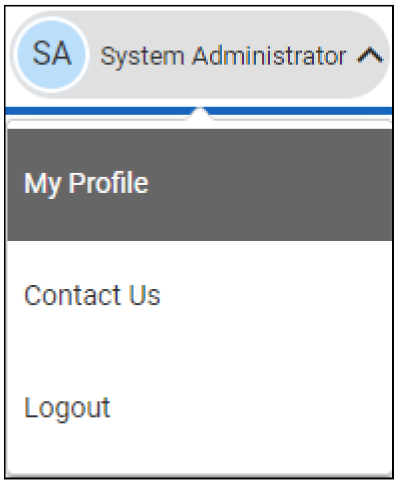
Field	Description
Code	Enter a unique identifier for the attribute's drop-down option value.
Label Key	Enter the label for the drop-down option value. This is the value shown in the drop-down where it appears in the LMS. For multi-language systems you can enter the label key that will be used to look 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.

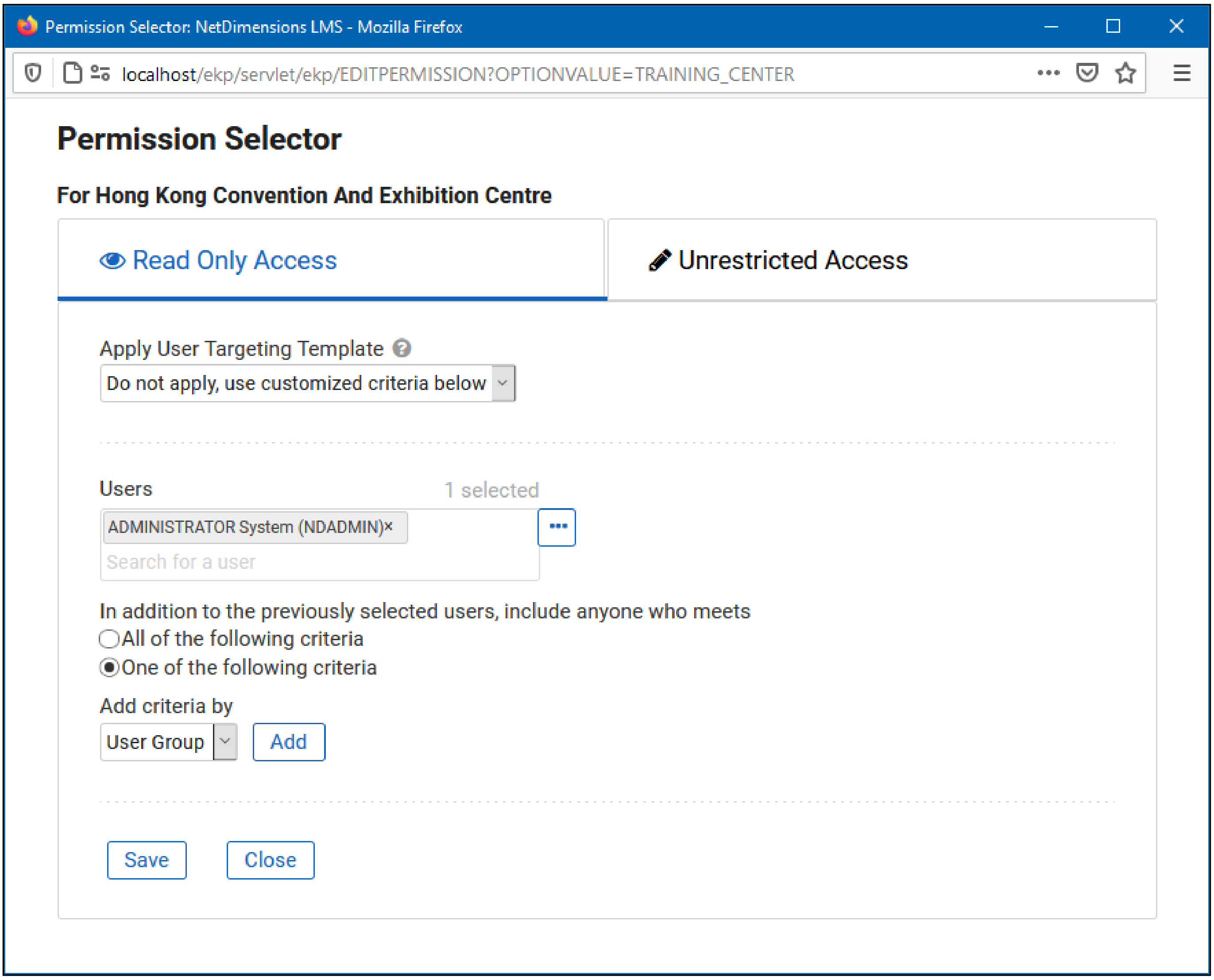


Figure: Permission Selector for Read Only Access to a Training Center

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.

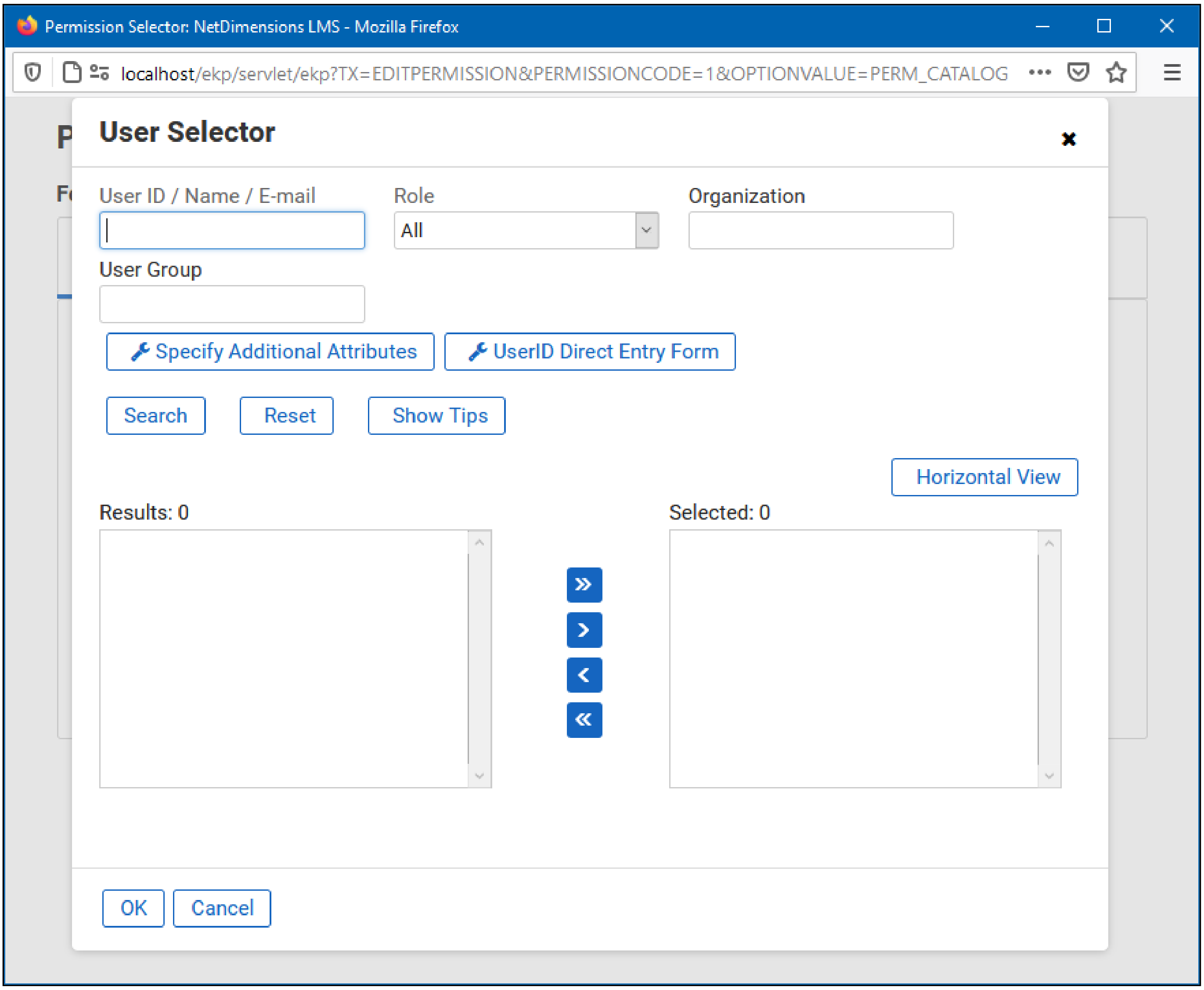


Figure: User Selector Accessed from the Permission Selector

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