PeopleFluent Learning

System Administration

Release 25.06

Contents

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System Administration

System administration involves a variety of tasks, some of which are completed by PeopleFluent staff before the LMS goes live, while others can be completed by LMS administrator users as required. System administration involves:

- Configuring the LMS to behave in a certain way, through the system configuration settings
- Exposing the appropriate features to different types of user, through system roles • Configuring the user interface
- Reporting on database and application performance and usage.

Most system administration tasks are listed in the System menu in the Manage Center, although system administrators may also be responsible for configuring communication features in the Communicate menu. A user with the System Administrator system role has all of the privileges required for all system administration tasks. The role has unrestricted access permission for all objects in the LMS, bypassing the permission settings that apply to all other system roles.

System Configuration Settings

The system configuration settings for the LMS determine much of its behavior, and the features available to learners, instructors and administrators.

Related settings are grouped into Categories. There are 20 categories associated with different functional areas of the LMS. For example, all system configuration settings for online payments are located in the Online Payments category.

When you open the System Configuration page, all settings are shown, and you can press `Ctrl+F` to search for settings. You can also filter the list of system configuration settings by category to make them easier to browse.

Update System Configuration Settings

System administrators and users with unrestricted access to the *System Configuration* feature in System Roles (Manage Features > System Administration) can update System Configuration settings.

To update System Configuration settings

1. Go to **Manage Center > System > General Settings > System Configuration**. The System Configuration page opens with the *All* category selected. All system configuration settings are accessible on the page.
2. Optionally, select a category from the Category drop-down list to filter the list of settings.
3. Update the value of as many settings on the page as required.
4. Click **Save**.
5. Repeat steps 2 to 4 as required.

You must save any changes made in a category before navigating to another category, otherwise your changes will not be saved.

System Configuration Category Reference

- General Category
- Home Page / Widget Page Category
- Catalog Category
- Certification Category
- User Category
- Knowledge Center Category

- Forum Category
- Mail Category
- Self-Registration Category
- Records-Transcript Category
- Online Payment Category
- Exams Category
- Enrolled Learning Modules Category
- Performance Review Category
- Goals Category
- Wiki Category
- eSignature Category
- Security Management Category
- System Category
- Competency Manager Category
- Search Category
- Webhooks Category
- System Maintenance Category
- Person Information Processor Category

Skins

PeopleFluent Learning LMS supports multiple skins for pages that use the legacy user interface (UI), allowing all users on a given instance to enjoy a look and feel that is specific to their user preference or the branding for their organization.

Skins comprise multiple files that define:

- Graphics
- Presentation styles
- Primary navigation
- The widget page template

Administrators can assign skins to users individually, in the User Editor, or in bulk, via the User CSV Data Loader. Permissions can be configured for skins to enable users to choose a skin in their user profile.

Pages that use the responsive UI to give a better user experience cannot be skinned. These include:

- Home page
- Current Courses
- Course Catalog
- Catalog Search
- Course Calendar

> To ensure consistent navigation, PeopleFluent recommends using the *PeopleFluent_LMS_Default* skin when the responsive UI is enabled.

For more information about skin customization, see the Skin Customization Guide, available from the Customer Community.

> To can export and upload new layouts (that is, skins) in the LMS you must have unrestricted access to the *Screen Layout Manager* feature in System Roles (Manage Features > System Administration).

Export a Skin

Exported Skin ZIP files contain the skin.properties file and any supporting files, such as navigations.xml, style sheets (CSS), images, widgets and fonts. Exporting a skin enables you to edit its constituent files and troubleshoot issues, before re-uploading it.

To export a skin

1. Go to **Manage Center > System > General Settings > Screen Layout Manager**.
2. Select the skin to export from the *Installed layouts* drop-down list and click **Export**. The ZIP file is downloaded to your browser's default download folder.

Upload a New Skin

New skins must be uploaded as ZIP files containing the *skin.properties* file and all related files. When you import a skin with the same file name as one already in the LMS, it replaces the existing skin.

To upload a new layout

1. Go to **Manage Center > System > General Settings > Screen Layout Manager**.
2. Click **Upload**.
3. Click **Choose File** and select the ZIP file in the file browser.
4. Click **Next**.
5. Optionally, enter a new name for the skin.
6. Click **Import**. When the skin has been imported, the page title changes to Saved.
7. Click the **Screen Layout Manager** link to return to the main Screen Layout Manager page.

You cannot delete a skin that is being used by one or more users.

Edit a Skin's Layout Properties

You can edit a skin's layout properties to:

- Upload, replace or delete the skin's primary navigation configuration file (navigations.xml)
- Select a widget page template for the skin, which can be overridden at system role and organization level
- Choose between a fixed or dynamic page width
- Configure the access permissions, to allow users to switch their skins and other administrators to view or edit their properties
- Read an updated deployment file (skin.properties) from the server into the LMS

By default, only the user who uploaded a skin to the LMS can edit it. Skin owners can configure their skins' permissions to allow other administrators to view or edit the layout properties of their skins. To edit a skin's layout properties, administrators must have a system role with unrestricted access to the *Screen Layout Manager* feature in System Roles (Manage Features > System Administration). Roles with read-only access to the Screen Layout Manager feature can only export skins to a ZIP file.

To edit a skin's layout properties

1. Go to **Manage Center > System > General Settings > Screen Layout Manager**.
2. Select the skin to edit from the *Installed layouts* drop-down list and click **Edit**.
3. To provide custom primary navigation, click **Upload** (if the skin has no associated navigations.xml file), or **Replace** to replace the existing navigations.xml.
4. To remove the custom navigation from the skin, click **Delete**. Without an associated navigations.xml file, the skin with use the default LMS primary navigation.
5. Select the widget page template to specify the widget page layout and content for the skin. This can be overridden at system role and organization level.
6. Select the page width type. If you select a fixed page width, enter the width in pixels.
7. If the skin.properties file has been updated directly on the LMS server (instead of being exported and edited externally), you can click **Read deployment file** to load it into the LMS.
8. Click **Permissions** to configure access permissions for the skin properties.
9. Click **Save**.

Logical Domains

Logical domains enable communities of users and some content to be partitioned within a single instance of PeopleFluent Learning. Domain-specific content includes email templates, enrollment policies, repository files, courses, catalogs, and user groups.

Logical domains define a number of properties, common to all users in a domain. These include the default System Administrator user, default new user profile, skin and primary language.

The LMS ships with the Global Default logical domain, to which all users belong until they are assigned to an alternative domain.

Domains have a one-to-one relationship with organizations: only one organization can be assigned to a domain, and different domains cannot be assigned the same organization.

System administrators can:

- Create logical domains
- Move users between domains
- Move organization branches between domains
- Delete logical domains

You can create new logical domains only if the Multiple Assignments feature is disabled in System Configuration. Multiple Assignments allows users to have multiple jobs, organizations, roles and other assignment details. (Likewise, multiple assignments can be enabled only if there is one logical domain; these two features are mutually exclusive.)

Deleting a logical domain re-assigns its users, and its domain-specific content, to the Global Default domain.

User administrators who are not in the Global Domain can upload user data via the User Data Loader only to their client domain.

When administrators who are not in the Global Domain create new users in the User Editor or via the User Data Loader, the new user's organization defaults to that of the administrator; their language and skin default to those assigned to the domain the organization is assigned to. New users can be assigned to other organizations (and therefore domains) but their language and skin must be updated manually.

To manage logical domains, go to **Manage Center > System > Logical Domains**.

Cross-domain Visibility

The main reason to have separate logical domains is to ensure that users in one domain do not see users in a different domain. Users in the Global Default domain may see all other organizations and users in the LMS, constrained only by permissions settings. Separate client domains, however, are automatically restricted to user management within that domain, and by default cannot see or be seen by users in other client domains. In most pages where users are displayed or selected, the list is restricted to same domain membership.

When creating logical domains, you can choose, separately, whether users in a logical domain can see users and email templates from other domains.

If creating separate login or and logoff pages for each domain, you must also plan for how you want users from different domains to get to that specific login page (for example, via a portal, a unique domain name, or using JavaScript handling).

Permissions

Permissions control is still in effect throughout the LMS, and is applied in addition to domain filtering. For example, within a domain you can still use permissions to limit which items and departments are accessible to other users within the domain.

Tagging

New child organization units are automatically assigned to the logical domain of their parent organization. New users are automatically assigned the domain of the organizational unit they belong to.

Moving an organization unit to another parent organization unit removes it from its original domain and reassigns it to the domain of its new parent. Child-organizations and users are re-tagged automatically. Content (such as email templates) is not automatically re-tagged, although deleting a domain will cause all items to be reassigned to the Global Default domain.

> System administrators with read-only or unrestricted access to the *System Administration* feature in System Roles (Manage Features > System Administration) can create logical domains.

Create a Logical Domain

> PeopleFluent recommends selecting the System User, System Approver and Default Profile from within the domain. Although this is not enforced, it will make general system behavior simpler to manage.

To create a logical domain

1. Go to **Manage Center > System > General Settings > Logical Domains**.
2. Click **+ Create New Domain**. The Logical Domain page opens.
3. Enter the details for the new domain. For detailed information about the Logical Domain fields, please see Logical Domain Field Reference.
4. Click **Save**.

Delete a Logical Domain

Deleting a logical domain re-assigns its users, and its domain-specific content, to the Global Default domain.

To edit a logical domain

1. Go to **Manage Center > System > General Settings > Logical Domains**. The Logical Domains page opens and lists the existing logical domains.
2. Click the name of the logical domain you want to delete. The Logical Domain page opens.
3. Click the **Delete** button.
4. Click **OK** to confirm the deletion.

Create and Manage HTML Widgets

HTML widgets are interactive components representing useful LMS features, and can be shown on the widget page when users log in. Typical widgets include a list of the learner's current enrollments, notification of certifications due to expire, and a summary of training progress. HTML widgets can also embed content from external sources that provide the embed link, which might provide streaming video, for example.

Widgets can be arranged on a widget page using the Widget Page Manager. Widget pages are then assigned to target users via skins, organization membership and logical domains. For additional information, please see Widget Page Templates.

> To configure HTML widgets you must have unrestricted access to the *HTML Widgets* feature in System Roles (Manage Features > System Administration). You must have the *Import and Export XLIFF files* Role Access Permission in System Roles to import and export HTML widgets.

Create an HTML Widget

> To use the WYSIWYG widget content editor, it must be enabled in System Configuration. Otherwise you can enter only the widget HTML source.

To create an HTML widget

1. Go to **Manage Center > System > General Settings > HTML Widgets**.
2. Click **+ Create HTML Widget**.
3. Enter a name for the widget. This name is visible only to administrators when configuring the widget or assigning it to a widget page template.
4. Optionally, select a language.
5. Enter the widget's title. This is shown as part of the widget in the widget page.
6. Enter the widget content.
7. Click **Save**.
8. To update a widget's access permissions, select **Permissions** from its action menu. The permissions determine which users can view or edit the widget in the Manage Center.
9. To update a widget's delivery language, select **Language** from its action menu.

Create and Manage Widget Page Templates

Widget page templates enable the widget page to be customized with a dashboard of information relevant to different types of user. For organizations that have not enabled the responsive user interface (known as the *New UI*), the widget page is the default home page users see after login. When the new UI is enabled, users can access the widget via the WIDGETCONTAINERPAGE transaction parameter (?TX=WIDGETCONTAINERPAGE).

Widget page templates can have one, two or three sections, each with one, two or three columns of various percentage widths. You can display any of the available widgets in any column by dragging them in. Widgets provide information and access to LMS functions in the widget page so that users do not have to navigate around the LMS to find them.

Widget page templates can be assigned to Skins, System Roles and Organizations. See Widget Page Template Order of Precedence in this topic for information about how each assignment is ordered.

Create a Widget Page Template

To create and edit widget page templates, and delete any that are not assigned to a skin, system role or organization you must have unrestricted access to the *Widget Page Manager* feature in System Roles (Manage Features > System Administration).

To create a widget page template

1. Go to **Manage Center > System > General Settings > Widget Page Manager**.
2. Click **+ Create new template**. The Create Widget Page Template page opens.
3. Enter a template name.
4. Select the number of sections required for the widget page.
5. For each section, select the number of columns and their percentage width.
6. Drag widgets from the Widget Library into the columns you want to display them in. You can drag multiple widgets into a single column and rearrange their order.
7. To remove a widget from a column, click its **X** link.
8. To preview the widget page, click **Preview**. (Click **OK** to return from the preview page.)
9. Click **Save**.

Assign a Widget Page Template to a Skin

To assign a widget page template to a skin, your role must have unrestricted access to the *Screen Layout Manager* feature in System Roles (Manage Features > System Administration).

To assign a widget page template to a skin

1. Go to **Manage Center > System > General Settings > Screen Layout Manager**.
2. Select the skin to assign the widget page to from the *Installed layouts* drop-down list and click **Edit**.
3. Select the widget page template for the skin from the Widget Page Template drop-down list.
4. Click **Save**.

Assign a Widget Page Template to a System Role

> To assign a widget page template to a system role, your role must have unrestricted access to the *Role Permissions* feature in System Roles (Manage Features > User Manager Features).

Widget page templates assigned to system roles take precedence over templates assigned to skins.

To assign a widget page template to a system role

1. Go to **Manage Center > Users > Roles and Permissions > System Roles**.
2. Click the system role to assign the widget page to.
3. Click **Data Access Control** in the navigation menu.
4. Select the widget page template for the skin from the Widget Page Template drop-down list.
5. Click **Update access control settings**.

Assign a Widget Page Template to an Organization

> To assign a widget page template to an organization, your role must have permission for *Allow Organization Maintenance* in System Roles (Data Access Control > Role General Permissions).

Widget page templates assigned to organizations take precedence over templates assigned to system roles and skins.

To assign a widget page template to an organization

1. Go to **Manage Center > Users > Group and Organization > Organization Maintenance**.

2. In the Summary View, expand the organization hierarchy to locate the organization you want to edit. Right-click on the organization and select **Edit** from the action menu. In the Flat View, select **Edit** from the action menu to the left of the organization name.
3. In the Widget Page Customization section, select the widget page template for the organization from the Widget Page Template drop-down list.
4. Click **Save**.

Widget Page Template Order of Precedence

If different widget page templates are assigned to organizations, system roles and skins, these example scenarios show which widget page template users will see.

Table: widget page templates assigned to each area

Widget Page Template	Organization A	System Role B	Skin C
1	Assigned		
2		Assigned	
3			Assigned

Table: user settings

User	Organization	System Role	Skin	Widget Page Template Used
X	A	B	C	**1**
Y	D	B	C	**2**
Z	E	F	C	**3**

System Languages

The languages available for your organization depend on your license. While US English is the default language, your LMS may include multiple other languages.

PeopleFluent Learning multi-language capability enables administrators to:

- Configure a single object with different language versions
- Configure language-specific learning content
- Translate object metadata in bulk
- Use delivery language options to target learners

When you activate a system language in the LMS, you can target the users who will see LMS pages in that language. Users can be targeted using either a user targeting template or any combination of:

- Organization
- User group
- Role
- Individual user selection

Users can select their preferred language in their user profile from those activated in the LMS for which they are included in the target audience.

For detailed information about multi-language content support in the LMS, see the *EN600 Multi Language Support* guide.

> To manage system languages you must have unrestricted access to the *System Language Activation* feature in System Roles (Manage Features > System Administration).

Activate a System Language

When you activate a system language, it can be assigned to LMS objects, allowing users within the target audience to interact with those objects in that language.

To activate a system language

1. Go to **Manage Center > System > General Settings > System Language Activation**.
2. Click **+ Activate a System Language**.
3. Select the language to activate from the System Languages drop-down list.

4. Select the users who can use the language. You can utilize a user targeting template or combine individually selected users with organization, role, attribute and user group criteria.
5. Click **Save**.

Deactivate a System Language

When you deactivate a system language, any LMS objects it was assigned to default back to US English.

To deactivate a system language

1. Go to **Manage Center > System > General Settings > System Language Activation**.
2. Locate the appropriate language and select Deactivate from the action menu.
3. Click **OK** to confirm the deactivation. The language is removed from the list of active system languages.

Edit a System Language Target Audience

To edit the target audience for a system language

1. Go to **Manage Center > System > General Settings > System Language Activation**.
2. Locate the appropriate language and select Target Audience from the action menu.
3. Select the target audience for the language by selecting either user targeting template or any combination of individually selected users with organization, role, attribute and user group criteria.
4. Click **Save**.

Configure IP Address Range Filters for Exam Access

You can enter the * (wildcard character) to represent any number for any of the four numbers in a starting or ending IP address. For example, `192.32.14.*` represents any of the IP address starting with network address `192.32.14`, of which there are 256 possible combinations of host address—the last number.

> System administrators with read-only or unrestricted access to the *System Administration* feature in System Roles (Manage Features > System Administration) can configure IP address range filters for exam access. Only participants whose IP address is within any of the ranges specified can access exam modules. You can configure as many IP address ranges as required.

To configure IP address range filters for exam access

1. Go to **Manage Center > System > General Settings > Default IP Filter for Exams**. The Default IP Filter for Exams page opens, listing any existing IP address ranges.
2. Enter the 4-figure starting IP address in the left-hand column.
3. Enter the ending IP address in the right-hand column.
4. Repeat steps 3 and 4 for up to five filters.
5. Click **Save**. The page refreshes to show that the filters have been updated.
6. Click **Default IP Filter for Exams** to return to the filters page. If all five filters were configured, another five empty filters are added to the list.

Content Server Configuration

If your LMS uses content servers outside of the LMS to provide faster or more local access to course content, you can register their details in the Content Server Configuration page. Implementing a content server—setting up a web server with a local set of course files—is beyond the scope of this document. For more information about implementing content servers, you can download the *EN137 Content Server Configuration and Deployment Guide* from the Customer Community.

The LMS uses the following rules to find a suitable content server for each user:

- If the course's launch URL is an absolute URL, the course is launched from that URL.
- If the user's IP address matches the IP address range configured for a content server, the course is launched from that content server.
- If a user has a specific content server selected in their profile, the course is launched from it.
- If the user's IP address does not match any content servers, and they do not have a content server selected in their profile, the course is launched from the LMS server.

> System administrators with unrestricted access to the *Content Server Configuration* feature in System Roles (Manage Features > System Administration) can configure the LMS to use content servers.

Configure Content Server

To configure content servers

1. Go to **Manage Center > System > General Settings > Content Server Configuration**.
2. To add a new content server, click **+ Add New Content Server**.
3. Enter a name and description.
4. Select the server scheme, which can be either HTTPS or HTTP.
5. Enter the hostname or IP address of the content server.
6. Click **Save**. The new content server is added to the list in the Content Server Configuration page.

Configure IP Address Ranges for a Content Server

Once you have created a content server and saved it, you can define its IP address range rules.

> You cannot use wildcards (*) in IP address ranges.

To configure IP address ranges for a content server

1. Go to **Manage Center > System > General Settings > Content Server Configuration**.
2. Click the name of the content server to edit.
3. Click **Add IP address rule** to filter the range of valid IP addresses for the server.
4. To edit an IP address rule, click its start address.
5. To delete an IP address rule, select its check box and click **Delete IP address rule**.
6. Click **Save**.

Exchange Server Configuration

PeopleFluent Learning supports bi-directional synchronization of events to and from Microsoft Exchange Server. This requires:

- Configuring Office 365 Exchange Online for OAuth2
- Registering the Exchange Server in the LMS
- Associating the exchange account (emails) with various entities in the LMS

Once set up, calendar events, such as personal events, class schedules, and facilities and class resources bookings) can be pushed to the Exchange Server to be displayed on the respective calendars, while events created on the Exchange Server can be synchronized to the calendars in the LMS.

Configuring Microsoft Exchange Servers is beyond the scope of this documentation. For more information, see the Microsoft Exchange Server Integration Guide, available from the Customer Community.

Link an Exchange Server to the LMS

System Administrators can link Exchange Servers to the LMS to enable events to be synchronized between Exchange Server calendars and LMS calendars.

To configure an Exchange Server in the LMS, the *Enable Exchange Server schedule integration* System Configuration setting must be enabled.

To configure an Exchange Server in the LMS

1. Go to **Manage Center > System > Exchange Server**. The Exchange Servers page opens with a list of existing Exchange Servers.
2. Click **+ Create New Server**.
3. Enter a name for the Exchange Server configuration in the LMS.
4. Select the **ExchangeOnline_OAuth2** Exchange Server type from the Version drop-down list. For Exchange Servers that use Basic Authentication, select any of the 2007 or 2010 versions. For Office 365 Exchange Online, using OAuth2 authentication, select **ExchangeOnline_OAuth2**.
5. Enter the email address for the LMS administrator user account added to Exchange Server.
6. For Exchange Servers using Basic Authentication, enter and confirm the password for the Exchange Server *LMS administrator* account.
7. For Exchange Servers using Basic Authentication, enter the Exchange Web Services (EWS) endpoint URL for the Exchange Server.

8. For Office 365 Exchange Online servers using OAuth2, eEnter the Client ID and Tenant ID copied from *Application (client) ID* and *Directory (tenant) ID* in the *App registrations* page in the Azure Active Directory admin center.
9. For Office 365 Exchange Online servers using OAuth2, eEnter the *Client secret* value copied from the *Certificates & secrets* page in the Azure Active Directory admin center.
10. Click **Save**. The new Exchange Server configuration is listed in the Exchange Servers page.
11. To test the connection, click the configuration name and then click **Test Connection**.

About Email Templates

Administrators can configure the LMS to send email notifications to users when certain events occur, using predefined templates. Email templates specify the message recipients and the message content, which can include parameters that insert user or enrollment-specific information. For example, on successful enrollment in a course, an email can be sent to the participant and to their manager, which can be personalized with their names and the course title.

System Templates and User Templates

The LMS comes with a number of System Default email templates relating to specific events. You can also create your own User Templates for events that do not have a predefined System Template.

> Whenever the LMS is upgraded to a new version, or if an administrator resets the default email template language, the System Default templates are reset, so any changes made to them are lost. Instead of changing any System Default templates, create a copy of the template you want to change and edit the copy. The copy is saved as a User Template.

Some events that can trigger emails have no System Default templates. To enable the LMS to send emails for these events, you can create appropriate email templates for them and then select them in the corresponding System Configuration settings or Enrollment Policy details.

> The LMS will send emails only if an email template has been specified for the corresponding event.

Email Recipients

You can configure email templates to have multiple recipients. The following types of recipient can be used in combination:

- Users with specific system roles
- A specific LMS user
- External email addresses

Languages

If your organization has a multi-language LMS implementation, you can configure email templates to be sent to LMS users in their preferred language, as long as it is one of the languages activated for the LMS. After saving a new email template in the default language, you can add other language versions of the email template. The LMS can then check the recipient user's *Language* setting in their user profile and send the corresponding language version of the email, if one has been created.

> Emails sent to external email addresses that you specify in Email Recipients (that is, not for LMS user accounts) can only be sent in the default language in which the email template message was written.

Predefined Messages

When you create a new email template you can select one of the predefined messages and edit it to suite your needs. All of the System Default messages are available to copy into a new message and edit in this way.

Message Parameters

You can add dynamic content to email messages (including the subject) using parameters. This enables you to create a single email for a particular event—a course session, for example—and substitute information corresponding to that event in place of the parameter. Parameters are enclosed in curly braces: {*parameter_name*}. Examples include: {course_title}, {session_start_date} and {venue}.

Message Format

You can compose email template messages in plain text or HTML. You can also convert—in bulk—all email templates between text and HTML Mime types, using the *Translate Email to HTML* feature.

Email Attachments

You can attach files from the repository to emails, along with a facility map and training center map, if they have been uploaded to the facility or training center for the course or session corresponding to the event that triggers the email.

Permissions

You can set the permissions per email template to specify which users and organizations can use or edit the template.

Usage

When you open a template in the editor you can see which of the following LMS features use it:

- Enrollment Policy References
- System References
- Certification References
- Organization Level Welcome and New Password References
- Learning Program/Module References

You cannot delete an email template if it is being referenced by any of the features listed above.

Configure and Manage Email Templates

> To configure email templates you must have unrestricted access to the *Mail* feature in System Roles (Learner-Oriented Features > Learn Features).

Create an Email Template

You can create a new blank email template.

To create an email template

1. Go to **Manage Center > Communicate > Email Manager > Email Template Editor**.
2. Click the **Create Template** icon on the toolbar.
3. Enter a name for the template (required)
4. To select the LMS user account that sends emails using this template, in the Sender section click the **browse** icon. The User Selector opens. Replies to the email are sent to the sender. If you leave this field blank, the default sender is the System Administrator user.
5. In the Recipients section, select which users (by system role) will receive emails using this template. Click the **browse** icon to select a single specific user to include as a recipient. You can also enter one or more external email addresses.
6. To base your email on a predefined message, select a predefined message from the drop-down list in the Message section. The message appears in the message editor, where you can edit it as required.
7. Enter the email subject (required)
8. Enter the email message in the editor. You can format the text using the options on the editor's toolbar. To edit the text in HTML, click the **Source Code** icon.
9. To insert parameters in the email text, select them from the **Parameters** drop-down list and click **Append to Message**. For detailed information about working with email parameters, please see Email Parameters.
10. To attach a file from the repository, click the **Assign attachment** link in the Attachments section. The Repository Manager opens in a new window, where you can select the file to attach. To attach the file, select its check box and click **Select**. The Repository Manager closes and the file is listed in the Attachments box in the Email Template Editor. You must also select the **Attach Learner's Prework and Standard References** check box for the file to be sent with the email.
11. Attach the facility and training center maps, if required.

12. Select a logical domain for the email template, if required. The logical domain determines some of the default settings to use when explicit values have not been specified. For example, the Default System Approver is defined per logical domain, and can be selected as a recipient for emails.
13. Click **Save**. After saving the template you can configure the access permissions for other administrators, and add languages.

Copy an Email Template

If you prefer to start from an existing template, you can make a copy and the new template will inherit most properties from the existing one. The only properties that are not copied are permissions.

> You should always copy a Default System template if you want to change it because whenever the LMS is upgraded to a new version the System Default templates are reset, so any changes made to them are lost. When you copy a template the new copy is saved as a User Template.

To copy an email template

1. Go to **Manage Center > Communicate > Email Manager > Email Template Editor**.
2. Select the email template you want to copy from one of the folders in the Templates tab, or search for it using the template search.
3. Click **Create a copy** to duplicate the template currently open in the editor.
4. Edit the copy as required.
5. Click **Save** to save it as a new User Template.

Add a Language to the Email Template

If your organization has a multi-language LMS implementation, administrators can configure email templates to be sent to LMS users in their preferred language, as long as it is one of the languages activated for the LMS. A user's preferred language is specified in the Language property in their profile.

You can only add a new language to a saved template. If you are creating a new template, you must save it before the option to add a new language is shown.

> If you enable emails to be sent in the recipients' preferred language, the email cannot be CC'd to other users.

To add a language to an email template

1. Go to **Manage Center > Communicate > Email Manager > Email Template Editor**.
2. Select the email template you want to add a language to from one of the folders in the Templates tab, or search for the template.
3. Click **Add new language** at the top of the page. The page updates to show only the Message section.
4. Select the new language from the Language drop-down list.
5. Enter the email subject in the new language.
6. Enter the email message in the new language, including parameters as required.
7. Click **Save**. The new language version of the email template is shown at the top of the page and is selectable for editing.
8. To enable emails to be sent in the recipients' language, click the **(Default)** language link at the top of the page and select the **Send Message in "To" recipient's language** check box.
9. Click **Save**.

To configure global settings for email, go to **Manage Center > System > System Configuration** and select **Mail** from the category drop-down list.

The Email Log

When the LMS sends an email, the send event is recorded in the main system log, *ekp.log*, in <tomcat_home>\webapps\lms\WEB-INF\logs. You can record the details of emails sent by the LMS by setting the *system.logmail* parameter to *true* in *ekp.properties*.

```
system.logmail=true
```

The mail.log file is located in the same logs folder as *ekp.log* and records the message, subject, recipient and sender.

Neither the *ekp.log* or the *mail.log* files record the status of sent emails. If you have access to your SMTP server you should be able to view the SMTP log to confirm the status. Most SMTP servers should log when the mail server received the email request from the LMS, the sender, the recipient, the email subject, the date and time the email was sent, and the send status. If an email failed to send, the reason for the failure should be stated. With many SMTP servers, you can even configure resend and bounceback options.

News Articles

You can configure news articles to display in the News fly-out on the home page, on the login page, in Knowledge Centers, in the Career Development Center, and in the News widget on the widget page.

News articles can be configured to target a specific audience of users. Expiry dates can be set and articles can be configured to be automatically deleted on a specific date. They can have attachments and can also contain surveys and polls.

Example Use Cases

You can use news articles to distribute:

- Non-critical announcements to all users (for critical announcements, use the Broadcast Messenger)
- Assignments
- Files
- Newsletters
- Course materials
- Forms, surveys and evaluations to participants enrolled in a particular course
- Information to new employees or employees who joined the organization between specified dates
- Draft documents for review by a specific group of people

> You can specify the number of news articles to display in the home page and News widget in the *Number of News Articles to Display* System Configuration setting.

Configure News Categories

You can configure news categories to help organize news articles for different purposes. News categories can be assigned permissions to specify read-only or unrestricted access for other administrators.

To configure news categories

1. Go to **Manage Center > Communicate > News Manager > News Category Configuration**.
2. To create a new category, enter its name in the New Name field and click **Add**. The news category is added to the News Category Name drop-down list.

Managing the Categories

- To configure permissions for a news category, select it in the drop-down list and click **Permissions**.
- To rename a news category, select it in the drop-down list, enter the new name in the New Name field and click **Update selection**.
- To delete a news category, select it in the drop-down list and click **Delete selection**. You cannot delete a news category if it is assigned to any news articles.

Create a News Article

> Administrators with read-only access to the *Communicate Menu* feature in System Roles (Learner-Oriented Features > Learn Features) can configure news categories and create news articles.

To create a news article

1. Go to **Manage Center > Communicate > News Manager > News Articles**.
2. Click **+ Create News Article**.
3. Enter the news article properties. For detailed information about the news article fields, please see News Article Field Reference.
4. Click Save.

Targeting Users for News Articles

After you have saved a news article, you can set a target audience. You can target news items to:

- Organization units
- Learning modules (that is, only users that are enrolled in the selected module will get the news)
- Catalogs, so that users with access to the selected catalogs will get the news (for example, new courses available)
- Specific user attributes
- Knowledge Centers. You can select courses or learning programs so that the news article will show in their respective Knowledge Center's news area.

To set the target audience

1. In the appropriate news article, click on the Target Audience tab.
2. Select the values for the target audience.
3. Click Save.

News Article Permissions

You can set permissions to allow other administrators read-only or full access to the news article.

1. In the appropriate news article, click on the Target Audience tab.
2. Scroll to the bottom of the page and select Permissions.
3. Set the permissions as required.
4. Click Save.

Create and Manage Discussion Forum Categories

Discussion forum categories organize your forums. You can specify a target audience for a forum category so that every forum assigned to it has the same target audience.

> Administrators with unrestricted access to the *Discussion Forum Categories* feature in System Roles (Manage Features > Community Manager Features) can create and manage forum categories.

Create a Discussion Forum Category

To create a discussion forum category

1. Go to **Manage Center > Communicate > Community Manager > Discussion Forum Categories**.
2. Click **+ Create New Category**.
3. Enter a name for the forum category.
4. Click **Save**.

Configure the Category Target Audience

After creating a new forum category, you must configure its target audience. Selection criteria can include user group, organization, organization attribute, role or the standard user attributes.

To configure the target audience:

1. Go to **Manage Center > Communicate > Community Manager > Discussion Forum Categories**.
2. Locate the appropriate forum category and select Target Audience from the action menu.
3. Select the users who will have access to the forum.
4. Click **Save**.

Set Category Permissions for Other Administrators

You have the option to set permissions for other administrators.

To set the permissions.

1. Go to **Manage Center > Communicate > Community Manager > Discussion Forum Categories**.
2. Locate the appropriate forum category and select Permissions from the action menu.

3. Configure the permissions as appropriate.
4. Click **Save**.

> For other administrators to assign their forums to a forum category you have created, give them read-only access to the category.

Delete a Forum Category

You can delete a forum category, which will effectively hide all forums that were assigned to it. The forums are not deleted, and administrators with access can still view, edit and open them in the Manage Center. You can re-assign affected forums to another forum category, if required.

> Deleting a forum category de-assigns any forums that were assigned to it, therefore those forums will no longer be visible to the target audience that was defined for the deleted category. Deleting the category also deletes its target audience.

To delete a discussion forum category

1. Go to **Manage Center > Communicate > Community Manager > Discussion Forum Categories**.
2. Locate the appropriate forum category and select Delete from the action menu.
3. Click OK.

Create and Manage Discussion Forums

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

Forum moderators (generally instructors) can delete forums or any topic or reply within forums for which they have unrestricted access permission. Administrators with the *Allow Forum Moderation* permission in System Roles (Data Access Control > Role General Permissions) can moderate forums.

Forums can be made available for specific set of users. For example, you may wish to create a course-specific forum only for the learners and instructors enrolled in the course.

Forums consist of topics and replies (also known as posts) to those topics. You can create different types of forums which determine who can create topics and reply to them.

To configure you forums you must have unrestricted access to the *Discussion Forums* feature in System Roles (Manage Features > Community Manager Features).

Create a Discussion Forum

When you configure a new discussion forum, ensure an appropriate forum category has been configured first, as the category defines which users can participate in or view the forum topics. For additional information, please see Create and Manage Discussion Forum Categories.

Forums consist of topics and replies to those topics. (Replies are known also as posts. The number of posts in a topic being the number of replies to the original topic post.) You can create different types of forum which determine who can create topics and reply to them.

To create a discussion forum

1. Go to **Manage Center > Communicate > Community Manager > Discussion Forums**.
2. Click **+ New Forum**.
3. Enter the forum name and, optionally, a brief description.
4. Click the **browse** icon to select a forum category to assign the forum to. Note: You must have read-only or unrestricted access to a category in order to assign it to a forum.
5. Select the forum type.

    - View Only - A unidirectional forum where only the forum moderator can create topics and write posts. Learners can only read them.
    - Reply Only - A forum where learners can only reply to a topic but not start a new one. New topics can only be started by the forum moderator.

- Reply and Create Topic - A forum where learners can reply to existing topics and start new topics.

6. Click Save.

Delete a Discussion Forum

When you delete a discussion forum all of its topics and replies are deleted. If you want to preserve the topics and replies in a forum, but do not want other users to see them, you can assign the forum to a category with no target audience. You can also restrict administrator access by setting its permissions.

> You can delete only the discussion forums for which you have unrestricted access permission. Administrators with unrestricted access to the *Discussion Forums* feature in System Roles (Manage Features > Community Manager Features) can delete forums.

To delete a discussion forum

1. Go to **Manage Center > Communicate > Community Manager > Discussion Forums**.
2. Locate the appropriate forum and select Delete from the action menu.
3. Click OK.

Broadcast a Message to All Users

With the Broadcast Messenger, you can send a message to all users at once. You write a message, save it, and activate it when ready. When activated, users who are logged in see the message immediately, while users who are not logged in will see the message the next time they log in.

You can use the Broadcast Messenger to send urgent organization-wide announcements, or to ask users to log out in order to carry out system maintenance. Messages are displayed in the browser's default alert dialog, with a button to dismiss them.

To create, save and activiate messages in Broadcast Messenger you must have unrestricted access to the *Broadcast Messenger* feature in System Roles (Manage Features > System Administration).

To create a broadcast message

1. Go to **Manage Center > Communicate > Broadcast Messenger**. The Broadcast Messenger page opens, populated with the most recently saved message.
2. Enter a title for the message.
3. Enter the message text.
4. To save the message without broadcasting it, select **Inactive** from the Status drop-down list and click **Save**.
5. To broadcast the message, select **Active** from the Status drop-down list and click **Save**. The message is shown to all logged-in users immediately.

While a broadcast message status remains *Active*, all users will see the message **every time they log in**. You must remember to set the message status to *Inactive* when you no longer need users to see it.

The Broadcast Messenger is reset when the LMS is restarted. For example, after a site is taken down for maintenance and restarted, users will not see the original message asking them to log off.

AI Assistant Recommendations

The AI Assistant Recommendations feature suggests courses that may interest learners by analyzing their training history. The recommendations are indicated by a star rating based on the level of relevance to the learner. When activated, learners can see recommended courses in the AI Assistant Recommendations page in the Learning Center.

Courses from the learner's training history are used to retrieve associated courses from two areas:

- Courses explicitly configured by a training administrator using the Catalog Editor. There may be zero or more courses when assembling the recommendation list, but all those present are assumed to be of high quality and thus receive a rating of 1.0.
- Courses ranked and associated with courses in the learner's training history by the background AI task running once per week. Each course may have an association rating between 0.0 and 1.0.

The system only displays courses that are in catalogs that the learner has permission to view.

A **Recommendations** widget is available that allow learners to view AI Assistant Recommendations.

> If the **Show only "Active" sessions System Configuration** setting is enabled, it will apply to the AI Recommendations and only active courses will display.

It is possible that the learner's training history or selected course does not have sufficient information to warrant a recommendation. In this case, the learner is presented with the following message:

Sorry, but there is not yet enough interaction and training analysis to provide you with meaningful course recommendations.

Uses of AI Assistant Recommendations

Users have several options available to refine the recommendations, which are themselves presented with a 'star' rating indicating the most relevant recommendations and an active link on each course title to take the user to the corresponding catalog page.

Recommendation Focus

- **Self-Enrolled Courses** - the recommendations will be based on courses in the user's training history that were self-enrolled.
- **Assigned Courses** - the recommendations will be based on courses in the user's history that were assigned (e.g. group enroll, auto-enroll,...).

- **Random Recommendations** - the recommendations will be based on all courses in the user's history, and since each course can have multiple associated courses, the assistant will use a probability function to vary the returned list instead of simply ranking the recommended courses and returning the highest-ranked courses (which is what happens with the first two options above). This means that this list can vary each time a "surprise me" request is made.

Additional items, if configured:

- **Job Title** - the recommendations will be based on courses in the user's history compared to the history of other users with the same job title
- **Organization Unit** - the recommendations will be based on courses in the user's history compared to the history of other users with the same organization unit (based on the highest level visible for the user's role).
- **User Groups** - the recommendations will be based on courses in the user's history compared to the history of other users in one or more of the same user groups as the logged-in user.
- **Job Profiles** - the recommendations will be based on courses in the user's history compared to the history of other users assigned one or more of the same job profile(s).
- **Competencies** - the recommendations will be based on courses in the user's history compared to the history of other users awarded one or more the same competencies.
- **Certifications** - the recommendations will be based on courses in the user's history compared to the history of other users with one or more of the same certifications.

Courses to Consider

- **Consider ALL My Training** - all courses in the user's history will be used in the analysis. This is the default case.
- **Consider Only Recently Completed Training (30 Days)** - only courses completed in the past month will be used for the analysis.
- **<Individual Courses listed>** - the remainder of the drop-down options will list individual courses in the user's history so that they can select an individual course for recommendations.

Display Limit

The number of recommendations returned is limited to the number selected in this field. Typically, these are returned in the order of relevance. The exception is the **Random Recommendations** focus.

Additional Recommended Course Information

Course Language

Courses with language bundles in the language selected by the logged-in user will display. Courses without language bundles in the selected language display the primary language bundle. This is the same functionality as Catalog Browse and Catalog Search.

Catalog Visibility

Only courses visible to the learner via Search or Browse appear for Recommendations. These are courses that are configured to show in a catalog and assigned to catalogs that the user has permission to view.

AI Assistant Recommendations Ratings Task

The AI Assistant Recommendations Rating background task uses a Collaborative Filter algorithm to rate relationships between courses. It runs once per week and the ratings are updated also only once per week. You can, however, run the task on an ad hoc basis from the Scheduled Tasks page in the Manage Center.

The task analyses all of the training history in the LMS. A typical analysis of a large database containing five million rows of training history records can be analysed in five minutes. This can temporarily use 500 MB to 1,000 MB of RAM, which is freed once the results are stored back in the database.

By default, only the past 18 months of training data are analyzed and each course must have at least 10 enrollments to be included in the recommendations. Both of these parameters are configurable.

Configure AI Assistant Recommendations

There are system configurations available for the AI Assistant Recommendations.

Transcript Data - Timeline for Training Data

By default, only the past 18 months of training data are analyzed. A System Configuration setting allows you to change this parameter:

1. Go to **Manage Center > System > System > System Configuration**.
2. In the **Select a Category** field, select **Records/Transcript**.
3. Locate the **Transcript history period (months)** field. Change the value to the desired timeline in months (minimum 6).

Transcript Data - Minimum Course Enrollment

By default, the system will require each course to have at least 10 enrollments to be included in the recommendations. A System Configuration setting allows you to change this parameter:

1. Go to **Manage Center > System > System > System Configuration**.
2. In the **Select a Category** field, select **Records/Transcript**.
3. Locate the **Minimum enrollments per module** field. Change the value to the desired number of enrollments (minimum 5).

Recommendation Options

By default, the AI Assistant Recommendations functionality only looks at courses on the transcript, and is not associated with user metadata. This system configuration to determine which user data elements allows transcript comparison with other users.

- **Job Title** - Courses based on skills associated with the user's job title.
- **Organization Unit** - Courses taken by other users within the same organization unit (based on the highest level visible for the user's role).
- **User Groups** - Courses taken by other users in the same user groups as the logged-in user.
- **Job Profiles** - Courses based on the histories of users with the same job profile(s).
- **Competencies** - Courses based on the histories of users with the same awarded, unexpired competencies.
- **Certifications** - Courses based on the histories of users with the same certifications.

To configure the setting:

1. Go to **Manage Center > System > System > System Configuration.**
2. In the **Select a Category** field, select **Records/Transcript**.
3. Locate the field and configure it as necessary.

Manage Terms of Use

You can configure terms of use agreements to which users must consent before they can use the LMS. You can configure multiple terms of use agreements and define a target audience for each so that they can be presented to different user cohorts. Multiple terms of use agreements can be targeted at specific users also.

> To manage terms of use agreements you must have unrestricted access to the *Terms of Use* feature in System Roles (Manage Features > Manage Features).

Create a Terms of Use Agreement

You can create terms of use agreements in the Terms of Use Manager. For multi-language systems, you can enter the text label keys for the terms of use title, text and *Agree* checkbox label. The LMS will automatically display the translated content to the user.

You can update the target audience for a terms of use agreement after publishing it, but you cannot edit or delete it.

To create a terms of use agreement

1. Go to **Manage Center > System > System Support Functions > Terms of Use Manager**.
2. Click **+ Create Terms of Use**.
3. Enter a title (name) or text label key for the terms of use.
4. Enter the text or text label key for the terms of use.
5. Enter the text or text label key for the *Agree* checkbox label.
6. To save the terms of use without publishing it, click **Save**.
7. To save and publish the terms of use, click **Save and Publish**.

Clone a Terms of Use Agreement

You can clone a pending or published terms of agreement as many times as required. Cloning a published terms of use agreement lets you update it (the clone) and then publish it to the users who were targeted by the previous version. Cloned terms of use agreements start with a *Pending* status.

To clone a terms of use agreement

1. Go to **Manage Center > System > System Support Functions > Terms of Use Manager**.
2. Locate the terms of use you want to clone and select Clone from the action menu.
3. A new copy of the terms of use is added to the list, with (*n*) added to the title (where *n* is the clone number).

Define a Terms of Use Agreement's Target Audience

You can target terms of use agreements at users who match specific criteria (for example, all users in a specific geographic location). More than one terms of use can be targeted at the same audience of users.

To define the target audience

1. Go to **Manage Center > System > System Support Functions > Terms of Use Manager**.
2. Locate the appropriate terms of use and select Target Audience from the action menu.
3. To use a predefined user targeting template, select it from the drop-down list.
4. To define a target audience for this terms of use only, enter the user selection criteria.
5. Click **Save**.

Publish a Terms of Use Agreement

When you publish a terms of use agreement, the users in its target audience are presented with it the next time they log in. They must agree to the terms of use before they can log in.

To publish a terms of use agreement

1. Go to **Manage Center > System > System Support Functions > Terms of Use Manager**.
2. Locate the appropriate terms of use and select Publish from the action menu.
3. The status is updated to *Published*.

Edit a Terms of Use Agreement

You can edit only terms of use agreements that have a *Pending* status. If you need to change a terms of use agreement that has been published, you can clone it and edit the clone.

To edit a terms of use agreement

1. Go to **Manage Center > System > System Support Functions > Terms of Use Manager**.
2. Locate the appropriate terms of use and select Edit from the action menu.
3. Update the title, text and agreement check box text as required. You can use text label keys for multi-language systems.
4. Update the permissions and target audience as required.
5. To save the terms of use without publishing it, click **Save**.
6. To save and publish the terms of use, click **Save and Publish**.

Delete a Terms of Use Agreement

You can delete only terms of use agreements that have a *Pending* status.

To delete a terms of use agreement

1. Go to **Manage Center > System > System Support Functions > Terms of Use Manager**.
2. Locate the appropriate terms of use and select Delete from the action menu.\
3. Click OK to confirm.

Configure a Login Reminder

You can create a login reminder notification for all users, which sends an email reminding them to log in to the LMS. Login reminders are particularly useful if the LMS is configured to suspend or close user accounts after a specified period of inactivity.

You can configure the LMS to send a login reminder to users who have not logged in for a specific number of days, or send a number of daily reminders, starting on a specific date.

> To create a login reminder you must have unrestricted access to the *Login Reminder* feature in System Roles (Manage Features > System Administration).

To create a login reminder

1. Go to **Manage Center > System > System Support Functions > Login Reminder**.
2. To send the reminder on a specific date, click the **Calendar** icon to select the next date on which to send the login reminder email.
3. If you selected a date on which to send a reminder, enter in the Login reminder repetition field the number of days to send the reminder email, up to a maximum of 99. Enter `0` to never send any more reminders after the initial email.
4. To send the reminder to users who have not logged in for a specific number of days, enter the number of days in the *Send log-in reminder to users not logged on for* field. Enter `0` to send the reminder to users who have never logged in.
5. Click the **browse** icon to select the email template used to send the login reminder.
6. Click **Save**.

System Support Functions

Debug and Tracing Options

Enabling debug and tracing options provides additional information in log files to help troubleshoot issues with LMS functionality. However, enabling these options may impact LMS performance.

You can enable or disable the following debug and tracing options:

- Debugging - Debugging is typically enabled for resolving login or authentication issues (with LDAP or SSO, for example).
- HACP Tracing - ICC-conformant courses use the HTTP/S-based AICC/CMI Protocol (HACP) to communicate with PeopleFluent Learning. You can enable HACP tracing to view HACP requests and responses on the server.
- AutoEnroll Tracing - Enable AutoEnroll Tracing to log AutoEnroll processing.
- Auditing - There are three levels of auditing: low, medium and high.

> Administrators with read-only access to the System Administration feature in System Roles (Manage Features > System Administration) can enable and disable debug debug and tracing options.

Enable or Disable Debug and Tracing Options

Enabling debug and tracing options provides additional information in log files to help troubleshoot issues with LMS functionality. However, enabling these options may impact LMS performance.

To enable or disable debug and tracing options

1. Go to **Manage Center > System > System Support Functions > Debug and Tracing Options**.
2. Select the Current Setting for each option.
3. Click **Save**.

Rebuild the Database Index

System administrators can manually start the process to rebuild the database index to optimize the performance of searches in the LMS. The database index is automatically rebuilt once per week as part of the *Standard Weekly Tasks* scheduled task. While the index is being rebuilt, users may notice a performance impact when searching the LMS. The larger the database, the longer it takes to rebuild the index.

> In addition to the automatic weekly rebuild, the database index is rebuilt as part of the start up process. A System Configuration settings controls which parts of the database index are rebuilt during or after startup. This is configured in the ekp.properties file for the index types (Competencies, Job Profiles, Reference Resources, Learning Modules, Users, News, Module Sessions and Transcripts). Index types not rebuilt during startup will be rebuilt in the background after the site has been restarted; while this is taking place there will be data not visible via the interface.

To rebuild the index

1. Go to **Manage Center > System > System Support Functions > Rebuild Index**. The Rebuild Index page opens and shows the number of records in the database that are missing from the index.
2. Click **Rebuild**.

View and Run Scheduled Tasks

You can view information about all scheduled tasks that the LMS runs automatically at specific frequencies. You can also run one or more tasks manually.

For each scheduled task the Scheduled Tasks page lists the following key information:

- The task name
- Frequency
- Type
- Last start time
- Last status
- Next run time
- Task status

You can also drill down to each tasks for more details about the last 10 times the task ran, which includes any status messages generated by the task.

To view and run scheduled tasks on demand. You can filter the scheduled tasks list by task frequency or type you must have unrestricted or read-only access to the *System Administration* feature in System Roles (Manage Features > System Administration).

To view and run scheduled tasks

1. Go to **Manage Center > System > System Utilities > Scheduled Tasks**. The Scheduled Tasks page opens with a list of scheduled tasks.
2. To filter the list of tasks, select a frequency, task type, or both from the corresponding drop-down lists.
3. To view more detailed information about the last 10 times a task ran, click the task name.
4. To run a task manually, select **Run** from its action menu, then click **OK** in the confirmation dialog. On completion, the Task Completed page opens with a status message.
5. To run multiple tasks together, select their check boxes and then select **Run Scheduled Tasks** from the Bulk Action drop-down list.

Manage Background Tasks

You can manage recurring data imports and exports in the Background Task Console.

Each task has a type, which specifies the type of data the task imports or exports, and a URL, which specifies the source or destination of the file to import or export. The console supports the following URL schemes:

- File (exported data is written to a file on the local file system)
- FTP (exported data is uploaded to a file on an FTP server)
- HTTPS (exported data is submitted using HTTPS POST)

If the URL points to a directory when the *file* scheme is used, the importer scans the directory for all files that do not have the *.imported* file name extension. Every matching file will be processed and then the *.imported* file extension added to the file name.

Task schedules are saved as Outline Processor Markup Language (OPML) files.

> To view and run scheduled import and export tasks in the Background Task Console you must have unrestricted or read-only access to the *System Administration* feature in System Roles (Manage Features > System Administration).

Create a Scheduled Import or Export Background Task

Administrators with unrestricted or read-only access to the *System Administration* feature in System Roles (Manage Features > System Administration) can create scheduled import and export tasks in the Background Task Console.

To create a scheduled import and export task

Go to **Manage Center > System > System Utilities > Background Task Console**. The Background Task Console page opens and lists any existing scheduled tasks.

1. Click **+ Add Tasks**.
2. Select **Import** or **Export** from the Task drop-down list.
3. Select the frequency it will run.
4. Enter a title for the task.
5. Enter the task type.
6. Enter the URL for the imported or exported file.
7. Enter an email address for the task's start and end notifications.
8. Click **Save**. The task is added to the list on the Background Task Console page.

Task Types

The Background Task Console supports the following task types:

- aiccPackage
- autoEnrollment
- certificationCsv
- completedTrainingRecordsXml
- courseCsv
- courses
- ekpXml
- examSectionImports
- examSectionQuestionImports
- externalTrainingCsv
- getUsersCsv
- imsEnterprise
- jobProfilesCsv
- mainExamImports
- modules
- organizationsCsv
- programCsv
- ServiceNowExamDataFeed
- externalTrainingCsv
- sfiaImport
- tncUsersCsv
- trainingHistory
- trainingHistoryCsv
- trainingHistoryXml
- turboTrainingHistory
- userMergeXml
- users200510Xml
- usersCsv

Background Task Schedules

Background task schedules are saved as Outline Processor Markup Language (OPML) files.

Hourly Schedules

Hourly import tasks are saved in *imports-hourly.opml*. Hourly export tasks are saved in *exports-hourly.opml*.

Daily Schedules

Tasks defined in *imports-daily.opml* and *exports-daily.opml* will be run daily. You can configure the hour of the day at which daily tasks are run by setting the value of the *system.handlerstarttime* property in WEB-INF/conf/ekp.properties. The value can be an integer between 0 and 23 inclusive. By default, daily tasks run at 3 a.m. To schedule daily tasks to run at 11 p.m., for example, set the value to 23 (`system.handlerstarttime=23`).

Weekly Schedules

You can configure the day of the week on which weekly tasks are run by setting the value of the *system.handlerStartDayOfWeek* property in WEB-INF/conf/ekp.properties. The value can be an integer between 1 and 7 inclusive, with 1 denoting Sunday and 7 denoting Saturday. By default, weekly tasks run on Sunday. Weekly tasks run at the same hour of the day as daily tasks. To schedule weekly tasks to run on a Saturday, for example, set the value to 7 (`system.handlerstarttime=7`).

Monthly Schedules

Monthly tasks always run on the first day of the month, at the same hour of the day as daily tasks.

OPML Background Task Definition Files

The background task schedules in the Background Task Console are saved as Outline Processor Markup Language (OPML) files in the in *WEB-INF/conf* folder on the LMS server. There is a task definition file for each import and export frequency combination:

- imports-hourly.opml
- imports-daily.opml
- imports-weekly.opml
- imports-monthly.opml
- exports-hourly.opml
- exports-daily.opml
- exports-weekly.opml
- exports-monthly.opml

These files contain task definitions in XML format. For example:

```
<?xml version="1.0" encoding="UTF-8"?>
<opml version="1.0">
  <head/>
  <body>
    <outline type="trainingHistoryCsv" xmlUrl="file:/c:/data/group-enrollment.csv"/>
    <outline type="users200510Xml" xmlUrl="file:/C:/temp/out/users.xml"/>
    <outline type="trainingHistoryXml" xmlUrl="ftp://uname:pwd@ftp.abc.com/data/
trainingHistory.xml"/>
    <outline type="csUsersCsv" xmlUrl="https://competencysuite.abc.com/cgi/
userimporter.asp"/>
  </body>
</opml>
```

Manage Training History

To archive training history you must have unrestricted or read-only access to the *System Administration* feature in System Roles (Manage Features > System Administration).

Archive Training History

If an archive database has been configured for your LMS, you can archive old training records (transcripts) to free up space in the LMS database. This function is particularly useful for long-running LMS systems with lots of old training records.

Configuring an archive database is beyond the scope of this documentation. For more information, see the *EN152 Archive Database Configuration Guide*, which is available to download from the Customer Community.

To archive training records

1. Go to **Manage Center > System > System Utilities > Archive Training History**.
2. Click the **Calendar** icon to select the enrollment date after which records are not archived. Records with enrollment dates before this date will be archived.
3. Select the **Inactive User Only** check box to archive transcripts only for user accounts with a status of *Closed* or *Logically Deleted*.
4. Click **Submit**. A confirmation is displayed that the request has been submitted and an email will be sent upon the completion of the request. The archive process is logged in the *ekp.log* file.

Restore Training History

If an archive database has been configured for your LMS, and training records have been archived to it, you can restore them to the LMS database.

Configuring an archive database is beyond the scope of this documentation. For more information, see the *EN152 Archive Database Configuration Guide*, which is available to download from the Customer Community.

To restore training records

1. Go to **Manage Center > System > System Utilities > Restore Training History**.
2. Select the date range to restore from.
3. Click **Submit**.

Customize Language Strings

You can customize individual text labels (strings) in the LMS user interface for a specified language (locale). When you update a text string it is saved in the database associated with the selected language, and takes precedence over the same label key value in any language files used by the LMS (for example, *standard.properties*).

The Search/Customize Language Strings function is recommended for isolated changes when only a few labels need to be changed. For extensive changes (for example, to replace every instance of *Program* with *Package*), PeopleFluent recommends using a *custom.properties* file. For more information about multi-language support for the LMS, please refer to the EN600 Multi-language Content Support Implementation Guide.

To search for and customize language strings you must have the *Allow Custom Language String Editing* permission in System Roles (Data Access Control > Role General Permissions).

Order of Precedence

When customizing locale text there is an order of precedence for handling language strings with the same key:

1. Labels entered for the locale via the Search / Customize Language Strings page.
2. Labels entered for the locale via the *custom_xx_XX.properties* file (these files are intended to hold client custom text and are never updated on LMS upgrade).
3. Labels entered for the locale via the *standard_xx_XX.properties* file (these files hold the LMS reference text, and are always updated on LMS upgrade).

Therefore, if a label has been customized in the Search / Customize Language Strings page and in a properties file, the label defined with the Search / Customize Language Strings Function takes precedence.

Search and Customize Language Strings

Deleting a text string removes it from the database only, it does not delete *.properties* file entries. The LMS must be restarted for the deleted string to be removed. (Updates are immediate and do not require a restart.)

To search and customize language strings

1. Go to **Manage Center > System > System Utilities > Search/Customize Language Strings**.
2. Select the language to search.
3. Optionally, enter the label.key to search in the String Key field. The label.key uniquely identifies a specific text label (string).
4. Optionally, enter the label.key value in the String Text field.
5. To return only customized text labels stored in the database, select the **Show database configured strings only?** check box.
6. Click **Search**. The page updates with a table of results, showing the String Key and String Text for the selected language.

To customize the label(s) from the result list

1. Select the check boxes of the labels you want to update.
2. Update the label text in String Text column.
3. Click **Update**.

Compare Languages

You can compare a target language properties file to the standard.properties file to identify any text strings that haven't been translated or copied to the target language. If any text strings are missing in the target language, you can copy and paste them into a file for reference.

> To compare languages you must have unrestricted or read-only access to the *System Administration* feature in System Roles (Manage Features > System Administration).

To compare languages

1. Go to **Manage Center > System > System Utilities > Compare Languages**.
2. Enter the name of the base language properties file—the one you want to compare other language files to. This defaults to the standard.properties file.
3. Enter the name of the target language properties file.
4. Select the **Append new line char** check box to insert a new line character `\n`, which would render the missing lines formatted with a new line each when viewed in the HTML source. This is ideal for copying the property lines without including any formatting into the language text file. However, the on-screen display will not have any line breaks.
5. Clear the **Append new line char** check box to insert an HTML `<br />` tag instead for each property line, which looks better when viewing on-screen. However, it is not ideal for copying the lines because of the possibility of including any existing formatting.
6. Click **Submit**. The missing text strings are listed.

Encrypt the Database Connection Password

In the standard configuration, the LMS stores the password used to connect to the database in clear text in the ekp.properties file. If your organization's security policy disallows storing clear text passwords in configuration files, you can generate an encrypted password to replace it.

Encrypted passwords can also be generated for the *ldap.activeDirectoryPassword* and *archive.password* in ekp.properties.

> To encrypt passwords you must have unrestricted or read-only access to the *System Administration* feature in System Roles (Manage Features > System Administration).

> Encrypted passwords are bound to LMS licenses. When the LMS license needs to be replaced (due to an upgrade or license extension), you will need to create a new encrypted password for the new license and copy it into ekp.properties.

To encrypt a password

1. Go to **Manage Center > System > System Utilities > Encrypt Password**.
2. Enter the unencrypted database connection password from ekp.properties.
3. Re-enter the password and then click **Submit**. The Result page shows the encrypted password string property (for example, `default.encryptedPassword=57A1794E9205CD614EB437052CA75C24`).
4. Copy the encrypted password string property into ekp.properties and delete the *default.password* entry that contains the clear text password.

Replace Domain Text

When setting up a new site using a database from a site that operated under a different domain name, you may need to update the references and URLs to use the new domain.

> To can change absolute URL references that may exist in various text in the LMS database, by replacing the old domain name with a new domain you must have unrestricted or read-only access to the *System Administration* feature in System Roles (Manage Features > System Administration).

To replace domain name text in the LMS database

1. Go to **Manage Center > System > System Utilities > Replace Domain Text**.
2. Enter the old domain name in the Old Name field.
3. Enter the new domain name in the New Name field.
4. Click **Submit**.

XLIFF Import and Export

To support the translation of LMS objects from their primary language to another, the LMS can import and export XML Localization Interchange File Format (XLIFF 2.0) files. Most translation bureaus or outsourced translators have a tool that can read an XLIFF file, so they can input their translations in a target language.

If you outsource translation for the LMS, you can export the following types of object and then import the translated versions:

- Learning Module
- News
- Certification
- Exam
- Question
- Catalog
- Job profile
- Competency
- HTML widget

> To can export and import XLIFF files you must have the *Import and Export XLIFF files* Role Generation Permission (System Roles > Data Access Control).

Import an XLIFF File

The import file can include translated data of multiple objects separated by the file element, with an original attribute reference to the object id. Each file element can be defined with multiple translatable fields. The import process only reads the target value defined in the translatable item and does the update on the language bundle accordingly. If the defined object doesn't contain a language bundle with the defined target language (*trgLang*), you can select whether to create the language bundle on-the-fly (unrestricted access permission to the object is required).

To import an XLIFF file

1. Go to **Manage Center > System > System Utilities > XLIFF Import and Export**.
2. Select **XLIFF Import**.
3. Click **Choose File** to select the .xlf file to import.

4. Select the check box if you want the LMS to create any new language bundles found in the XLIFF file.
5. Select the check box if you want the LMS to reset question status to Work In Progress if new question bundles are created.
6. Click **Import**.

Export an XLIFF File

When you export an XLIFF file you select the object's source language, the target language to translate to, and the object type. You can export all objects of the selected type, or select specific instances.

Translatable fields in the source language are generated only if the object's primary bundle is assigned the source language, which means only the primary bundle content is used as the base to translate from. If the language bundle in the target language already contains some defined translations, they are exported as well, otherwise empty values are generated. If the target language bundle is not configured yet, empty values are generated.

To export an XLIFF file

1. Go to **Manage Center > System > System Utilities > XLIFF Import and Export**.
2. Select **XLIFF Export**.
3. Select the source language you want to export for the object or objects.
4. Select the language you want the source text to be translated to.
5. Select the type of LMS object to export.
6. Select whether to export all instances of the object type that have a primary language matching the selected source language, or whether to export specific objects.
7. Click **Export**. The .xlf file is saved to your browser's default download location.

Status and Logs

Ping the LMS Server

Administrators can ping the LMS server to see how long it takes to send and receive a minimally sized transaction (TX) request. A round trip of more than one second may indicate network issues.

> To ping the LMS server you must have unrestricted or read-only access to the *System Administration* feature in System Roles (Manage Features > System Administration).

To ping the LMS server

1. Go to **Manage Center > System > Status and Logs > Ping**.
2. Click **Ping**. The time taken is shown in milliseconds (ms).

View RSS Feeds

To view a list of connected RSS feed channels and their URIs you must have unrestricted or read-only access to the *System Administration* feature in System Roles (Manage Features > System Administration).

The RSS Feeds page also shows RSS feed channels that cannot be connected.

For more information about configuring RSS feeds, see EN569 Configuring RSS Feeds, which is available to download from the Customer Community.

To view the list of RSS feeds, go to **Manage Center > System > Status and Logs > RSS Feeds**.

View ID Manager Status

> To view the sequence numbers (that is, the ID Manager key values) of individual tasks you must have unrestricted or read-only access to the *System Administration* feature in System Roles (Manage Features > System Administration).

For example, if the current sequence ID for news items is 17000, the next news task sequence number assignment is 17001.

To view the list of RSS feeds, go to **Manage Center > System > Status and Logs > ID Manager Status**.

View User Sessions

Administrators with unrestricted or read-only access to the *User Sessions* feature in System Roles (Manage Features > System Administration) can view active user sessions and kill them, if required.

If the *Advanced: Allow Persistent Sessions (Session Hijacking)* System Configuration setting is enabled, killing an active session automatically starts a new one.

To view user sessions

1. Go to **Manage Center > System > Status and Logs > User Sessions**. The User Sessions page opens with a list of users currently logged into the LMS, as well as any access violations.
2. To kill a user session, select its check box and click **Kill Session**.

View the Access Violation Report

Administrators with unrestricted or read-only access to the *Access Violations* feature in System Roles (Manage Features > System Administration) can view and filter the list of LMS access violations, such as invalid login attempts. You can filter the list of access violations by start date, end date or both.

To view the access violation report, go to **Manage Center > System > Status and Logs > Access Violation Report**.

View the Background Task Monitor

Administrators with read-only access to the *Background Task Monitor* feature in System Roles (Manage Features > System Administration) can view a list of background tasks that have executed, are executing, and are waiting to execute since the last system startup. The list includes tasks owned by all LMS users by default, but you can filter the list to show only your own tasks.

The *Number of Days Background Task Logs are retained* System Configuration setting determines the number of days included in the list of background tasks.

To view the list of background tasks, go to **Manage Center > System > Status and Logs > Background Task Monitor**.

View Auditing Settings

To view the enabled auditing options you must have unrestricted or read-only access to the *System Administration* feature in System Roles (Manage Features > System Administration).

All except Full Auditing are enabled by selecting the Low, Medium or High level of auditing option in the Debug and Tracing options page.

To view the auditing settings, go to **Manage Center > System > Status and Logs > Auditing Settings**.

View the System Log

Administrators with unrestricted or read-only access to the *System Administration* feature in System Roles (Manage Features > System Administration) can view the main LMS system log file, *ekp.log*, which is located in the */WEB-INF/logs/* folder on the server.

You can change the number of lines displayed on the page and also download the ekp.log file to your browser's default download folder.

To view the system log

1. Go to **Manage Center > System > Status and Logs > System Log**. The System Log page opens, showing the 50 most recent lines written to the log.
2. To change the number of log file entries displayed, enter the desired number of entries in the Lines box.
3. To download the ekp.log file, click **Download zipped log**.

About the PeopleFluent LMS API

PeopleFluent Learning exposes some of its functionality via an Application Programming Interface (API). You can read the API documentation and invoke the API interactively to learn how it works.

For more information about the PeopleFluent LMS API, see the PeopleFluent LMS API Implementation Guide, which you can download from the Customer Community.

To read the API documentation while logged into the LMS, and use it interactively, go to **Manage Center > System > PeopleFluent LMS API**.

Copy Gadgets

> To copy simple HTML gadgets from the Gadgets page to include in other web pages you must have unrestricted or read-only access to the *System Administration* feature in System Roles (Manage Features > System Administration).

You can copy and paste the HTML directly or use the link to embed the gadget if the page is hosted on a site that supports Google's Gadgets API.

If you use the gadget code, rather than the link, you can modify the inline CSS on your own pages to update the appearance of HTML gadgets.

The following gadgets are available:

- Recent Activity
- Latest Courses
- Enrollments
- News
- Latest Forum Posts
- Personal Calendar
- Assigned Job Profiles
- Competency Completion Status
- Certifications Awarded
- Training Plan

To copy the gadget HTML or Google Gadget's API link, go to **Manage Center > System > Gadgets**.

> The Google Toolbar link on the Gadgets page is a legacy feature and is no longer supported.

Domain Filtering for User Groups

All LMS user groups belong to a logical domain. By default, new user groups are assigned to the logical domain of the administrator creating the user group.

Administrators with visibility across multiple domains can update a user group's domain by editing the user group.

Domain Filtering Rules

Object *X* can see object *Y* if any of the following conditions are true:

- *X* is a cross-domain administrator
- *X* is in the Global Default domain
- *X* is in a domain with the *Remove access restriction on other client domain user records* option enabled
- *X* and Y are in the same domain

This domain filtering logic is used to determine:

- Whether the logged-in user (*X*) can see another user (*Y*)
- Whether the logged-in user (*X*) can see an organization (*Y*)
- Whether the logged-in user (*X*) can use a user group (*Y*)
- Whether a user group (*X*) can have a candidate user (*Y*) as a member

Whether a logged-in user can assign a candidate user to a user group depends on the following factors:

- The domain of the logged-in user
- The domain of the user group
- The domain of the candidate user
- Whether the logged-in user has write permission to the user group
- Whether the logged-in user is a cross-domain administrator

Logical Domain Field Reference

Use the table below to help you correctly format logical domains.

Field	Description
Logical Domain	Enter a unique name for the logical domain.
Organization	Click the Organization link to select the organization units to assign to the logical domain.
Comments	Enter any comments relevant to the logical domain.
Default System User	The default system user defaults to your system administrator user account. To select another default system user for the domain, click the **X** link to remove the current user, and then click the **browse** icon to select another user. A logical domain can have only one default system user.
Default System Approver	The default system approver defaults to your system administrator user account. To select another default system approver for the domain, click the **X** link to remove the current user, and then click the **browse** icon to select another user. A logical domain can have only one default system approver.
Feedback Address (E-mail or URL)	Enter an email address or feedback form URL where domain members can contact the default system approver. Entering a feedback address enables the Contact Us link in the avatar menu of users in the logical domain. A feedback address entered here takes precedence over a feedback address entered for an organization in this logical domain.
Language	Select the primary language for the domain from the drop-down list. New users imported via the User Data Loader are assigned this language if the Language field in the CSV file is left blank. The language for users created in the User Editor is set to the language assigned to the domain of the administrator who created them.

Interface Look and Feel	Select the skin for the domain from the drop-down list. New users imported via the User Data Loader are assigned this skin if the Skin field in the CSV file is left blank. The skin for users created in the User Editor is set to the skin (selected in this drop-down list) assigned to the domain of the administrator who created them.
Workflow Template	Select an assessment workflow template from the drop-down list. New users created in the domain will be assigned the pre- or post-course assessments as defined in the workflow template. A workflow template selected for a logical domain takes precedence over a workflow template selected for an organization assigned to that domain.
Allow users in this domain to see users from other domains	Select this check box to allow users in this domain to see the records of users in other domains. This enables domains to be set up where the configuration details are in effect, but not the record restrictions.
Allow users in this domain to see e-mail templates from other domains	Select this check box to allow users in this domain to see the email templates of users in other domains.

Catalog Category

Use the table below to configure the system configuration settings in the Catalog category.

Setting	Type	Description
In catalog editor, the default value for price info	Text	Enter the default text for the Price Info text box attribute in the Cost Information page for new learning modules. This text can be changed in the Catalog Editor when configuring cost information for courses that are charged per registration or that take online payment.
Show catalogs in search result listing	Check box	Select this check box to include the name of the catalog in source results for course.
Show reference resource file URL	Check box	Select this check box to display in course details pages the URLs for reference resources in addition to their description. This may be useful if the URL or filename contain additional information. Clear this check box to display only the description for reference resources in course details pages.
Show empty catalog description fields?	Check box	Select this check box to display in course details pages catalog description fields that have no values. For example, if no values have been saved for the More Information or Objectives fields in the Catalog Editor, those empty fields are still shown in course details pages. Clear the check box to hide catalog description fields that have no value.
Show subjects of Learning Module	Check box	Select this check box to display the Category and Subject fields in the Catalog Editor, so they can be assigned to learning modules. Course categories and subjects will also be displayed in course details pages.

Show subjects in left frame	Check box	Not used. This was for the Classic Browse view that is generally not used by customers.
Quick List Subjects	Check box	Not used. This was for the Classic Browse view that is generally not used by customers.
Allow Learning Program Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Certification Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Online Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Exam Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Class Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Virtual Classroom Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Virtual Classroom Archive Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Workshop Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow External Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Book Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow CD Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Video Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.

Allow Audio Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Just-In-Time Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Special Interest Group Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Self-Training (Paper) Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Self-Training (Video) Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Coaching Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow On-the-Job Training Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Allow Task Learning Type	Check box	Select this check box to show this learning type in the relevant search and editor windows.
Default Size of Window	Text	Enter the default size in pixels for the Catalog Editor window, in the format width, height (for example, 1024, 768). If this field blank is blank or contains an invalid format, the default is set to 800 x 600.
Width of Course List frame	Number (Min=120, Max=512)	Not used.
The Number of Columns in the Catalog List Frame	Number (Min=1, Max=2)	Not used.

Display invitation/ confirmation status in participants list	Check box	Select this check box to display the current invitation and confirmation status for participants in the Catalog Editor's Participants page. This feature helps course administrators to manage the status of learners who must follow a manual invitation and confirmation workflow (using faxes or phone calls, for example).
Show non-enrollable session in search catalog	Check box	Select this check box to include in Catalog Search results courses that have no sessions available for enrollment.
Display iCalendar links	Check box	Select this check box to show iCalendar links in course detail pages. Learners can click the link to import scheduled course sessions into a calendar application such as Microsoft Outlook. Links are shown only if at least one of the start date and the end date is specified.
Directly display all learning program sessions	Check box	Select this check box to show in course detail pages all sessions in a program. Clear this check box to show only the first session, initially, with a drop-down list to choose the session to show.
Show the "Only show items with active schedule(s)" option	Check box	Select this check box to show only results with an active schedule when session level search results are enabled (See *Enable Session-level Catalog Search Results*). This setting applies only to the legacy user interface (that is, when the user's skin is anything other than *PeopleFluent_LMS_Default* and they do not have *Enable new UI* set to Yes in their profile).
Hide instructors in catalog	Check box	Select this check box to not show instructors in course details pages. Clear this check box to show instructors in course details pages.

Hide enrollment start date in catalog	Check box	Select this check box to show in course details pages only the enrollment deadline. Clear this check box to show the enrollment period (that is, the start and end dates for enrollment).
In catalog editor, show start date and end date fields for online modules	Check box	Select this check box to enable start and end date fields in the session properties for online courses.
Directly enroll and launch modules from catalog search results and learning path for single-session learning types	Drop-down list	Select from the drop-down list whether learners can directly enroll and launch single-session learning types (such as online courses) from Catalog Search results and the Learning Path: • Disable • Enable with Enrollment Confirmation • Enable without Enrollment Confirmation
Enable Session-level Catalog Search Results	Check box	Select this check box to return sessions in Catalog Search results, in addition to courses. Enabling this option provides session-oriented search result filters in the legacy UI, enabling learners to refine search results by location and region. Clear this check box to provide course-level search results only, which can be refined by type, vendor, subject and language.
Allow course coupon	Check box	Select this check box to enable learners to use course coupons to enroll in courses.
Default Initial User View to Browse	Check box	Not used.
Use Classic Browse View	Check box	Not used. This view is generally not used by customers.
Show course info in explorer window	Check box	Not used.

Allow user to mark as completed set to enabled by default	Check box	Select this check box to enable by default the option to allow learners to mark a course as complete. This option is in the Catalog Editor > Enrollment Security page. This default setting only applies to learning types that can be tracked; learning types that cannot be tracked will always have this feature disabled by default.
Enable SCORM 2004 support	Check box	Select this check box to enable SCORM 2004 support in the LMS.
Course Player	Single choice	Select one of the options for how courses are rendered in browsers: • Frameset Player • IFrame Player If you select IFrame Player, you can select the check box to allow full-screen content, if required.
Enable module cloning	Check box	Select this check box to be able to clone learning modules. Learning modules can be cloned from the Learning Modules page and in the Catalog Editor.
Session Changed E-mail Template to be sent to Participants	Selector	Click the **browse** icon to select the email template used to send emails to participants when a session's venue, facility or overall start and end dates are updated via the Catalog Editor. A learner is considered a participant recipient if they are enrolled in the session (with a status of active or invitation only) and their transcript status is either In Process or Not Started.

Session Changed E-mail Template to be sent to Instructors	Selector	Click the **browse** icon to select the email template used to send emails to instructors when a session's venue, facility or overall start and end dates are updated via the Catalog Editor.
Send Session Selection E-mail	Check box	Select this check box to send an enrollment confirmation email to learners who select a session in the Knowledge Center or course details page for a course that prompts learners to select a session.
Course ID Generator Format	Text	Enter the format used by the Catalog Editor to generate a unique module ID when administrators create a new learning module. Using this system configuration setting enables you to create learning modules with a standard ID format and a static prefix. For example, MOD-0005, where 0005 is the next available unique four-digit number.
Enable catalog assignment at the user level	Check box	Select this check box to enable the Catalog Access fields in the User Editor. This feature enables administrators to specify catalogs the user can access in addition to those they can access via catalog permissions.
Default Working Days Start Day	Drop-down list	Select from the drop-down list the default start day of the working week for session schedule selection. If updated, this setting takes effect from the next time users log in to the LMS.
Default Working Days End Day	Drop-down list	Select from the drop-down list the default end day of the working week for session schedule selection. If updated, this setting takes effect from the next time users log in to the LMS.

Default Working Hours (hh:mm-hh:mm)	Text	Enter the default working hours for session schedule selection, in the 24-hour format: *hh:mm-hh:mm*, where *hh* can be 00 to 23, and *mm* can be 00 or 30. For example, 09:00-17:30. If the format of this value is invalid, the default value 09:00-17:00 will be used.
Search result format	Single choice	Select a Catalog Search results format. This determines what information is included in the results list. This setting applies only to the legacy user interface (that is, when the user's skin is anything other than *PeopleFluent_LMS_Default* and they do not have *Enable new UI* set to Yes in their profile).
Show enrollment substitution in session properties of catalog editor	Check box	Select this check box to allow course administrators to replace a participant enrolled in a session with another participant. This option enables the Enrollment Substitution option in each participant's action menu, in the Catalog Editor > Session Properties > Participants page. Enrollment Substitution prerequisites: • The session cannot be for a program learning module. • The overall status of the selected participant must be *Not Started* or *In Process*. • The session must have not started.

Session Code Generator Format	Text	Enter the format used by the Catalog Editor to generate a unique Session Code when administrators create a new session. Using this system configuration setting enables you to create sessions with a standard ID format and a static prefix. For example, SESSION-0005, where 0005 is the next available unique four-digit number. The maximum length allowed for a session code is 85 characters.
Automatically generated session code must be unique across the system	Check box	Select this check box to ensure that new session codes are unique. The LMS will check new session codes against existing session codes that were created from the last time this setting was enabled. It does not check them against sessions that were created before this option was enabled.

Default Share/ credit enrollment for programs	Single choice	Select the default value for the *Share/credit enrollment* field in the Define Enrollment Policy page for programs. Where a component module or program (or its equivalent) has been completed by the learner prior to enrolling in the program, you can specify the default value for whether or not the learner is expected to retake the learning. If *Requires the learner to retake the learning* is selected, the learner will have to achieve a new completion of the learning in order to complete the program. If the learner is currently enrolled (*waitlisted*, *Not Started*, *In Process*, or *Pending*) in the module, completion of the current enrollment will contribute towards program completion. If *Does not require the learner to retake the learning* is selected, the learner will be credited for the learning completed previously. The learner may be required to retake the course even if this option has been selected if the program session requires the effective/ approved revision of its component modules and the learner's training history does not include the effective/approved revision.
Program completion requires module to be on Effective/Approved revision	Check box	Select this check box to set the default value for *Program completion requires modules to be on Effective/Approved revision* to be true when programs are created. This can be toggled for program sessions individually, on the Assign Module page.

Allow administrators to publish new revisions to learners whose status in earlier revisions is Completed	Check box	Select this check box to enable administrators to publish a new revision of a course to learners whose status in earlier revisions is *Not Started*, *In Process*, or *Completed*. Publishing a new revision in this way will ensure learners re-opening the completed course will launch the effective revision. PeopleFluent recommends disabling this option for regulated environments, as it can result in transcripts being updated with the effective revision after they have reached a final status.
Instructor Assigned to Class E-mail Template	Selector	Click the **browse** icon to select the email template used to send emails to instructors when they have been assigned to a classroom session. When an instructor is assigned to a classroom session in the Catalog Editor > Instructors page, the LMS prompts the administrator to confirm they want the email to be sent. This applies only to instructors who have been assigned manually, not to dynamically assigned instructors. The email includes iCal invitations, if configured. Instructor information can be included in the email template using the *{Course Schedule}* parameter.
Instructor Deassigned from Class Email Template	Selector	Click the **browse** icon to select the email template used to send emails to instructors when they have been deassigned from a classroom session. When an instructor is de-assigned from a classroom session in the Catalog Editor > Instructors page, the LMS prompts the administrator to confirm they want the email to be sent.

Session Retired E-mail Template to be sent to Participants	Selector	Click the **browse** icon to select the email template used to send emails to participants when a session is retired. A learner is considered a participant recipient if they are enrolled in the session with a status of *In Process*, *Not Started*, *Pending Approval*, *Prompt User To Select Session* or *Waitlisted*.
Session Cancelled E-mail Template to be sent to Participants	Selector	Click the **browse** icon to select the email template used to send emails to participants when a session is cancelled. A learner is considered a participant recipient if they are enrolled in the session with a status of *In Process*, *Not Started*, *Pending Approval*, *Prompt User To Select Session* or *Waitlisted*.
Session Cancelled E-mail Template to be sent to Instructors	Selector	Click the **browse** icon to select the email template used to send emails to instructors when a session is cancelled.
Default Event/ Session Status on Session Creation	Drop-down list	Select the default event or session status for new sessions for enrollable learning types: • Active • Pending
Allow Assessment Score for online equivalent learning type	Check box	Select this check box to allow a system administrator or instructor to enter a score for online equivalent courses, overriding the system-generated score.
Default course image for Catalog Display	Selector	Click the **browse** icon to select an image from the repository as the default course image to show in catalogs, course details pages, and the Knowledge Center.
Default catalog image for Catalog Display	Selector	Click the **browse** icon to select an image from the repository as the default catalogs image to show in the Catalog Browser.

Course Checklist Item Reminder Email Template	Selector	Click the **browse** icon to select the email template used to send to the checklist item owner when the item is about to reach its deadline or, if the deadline has a reminder period, when it is time to remind the owner of the approaching deadline.
Course Checklist Owner Change Email Template	Selector	Click the **browse** icon to select the email template used to notify the new checklist item owner when an administrator assigns the checklist item to them.
Default Failed and Deadline Expired Program Modules Handling	Single choice	Select the default setting for failed and deadline expired program module handling when creating new programs: • Allow learner to re-enroll on the module within the context of this program (Enrollment Checks like approvals, prerequisites, waitlisting, etc. may still apply.) • Do not allow the learner to re-enroll on the module within the context of this program Automatically fail this program for the learner if mandatory modules or elective credits requirement can no longer be met
Allow Multiselect Facets in Faceted Search	Check box	Select this check box to enable multiple filter check boxes to be selected, to refine search results in the legacy UI.
To create or clone sessions for a module, administrators must have	Single choice	Select the type of access permission for a module administrators need in order to create or clone sessions for it: • Unrestricted Access to the module • Read Only Access to the module

Show module images in catalog browser	Check box	Select this check box to always show learning module images in the Catalog Browser. If a module does not have an associated image, the placeholder image is shown. (See the *Default course image for Catalog Display* System Configuration setting.) Clear this check box to disable the images used for courses in all catalogs. This can be useful if your organization does not use images for some or all of its courses, and you do not want to use placeholder images.
Setting for Catalog Editor - Standard/ Advanced Navigation	Single choice	Selecting Standard or Advanced will change the Catalog Editor navigation. Standard will be a more limited set of options. Special Notes This is the default setting if an administrator has not changed the setting individually when editing a learning module. When an administrator clicks the button within the Catalog Editor to change the option, that selection will be remembered.

Certification Category

Use the table below to configure the system configuration settings in the Certification category.

Setting	Type	Description
Preferred Date Format in Awarded Certificates CSV Loader	Text	Enter the preferred date format for DATE_ACHIEVED and EXPIRE_DATE specified in CSV files imported with the Awarded Certificates CSV Loader. For more information, see Certificate Date and Time Patterns. If not specified, *dd-MMM-yyyy* will be used.
Default Achievement Date in Awarded Certificates CSV Loader	Date	Optionally, select a default certification achieved date. If no DATE_ACHIEVED date is specified in imported Awarded Certificates CSV records, this date will be used. If no default date is specified here, and there is no DATE_ACHIEVED date in imported Awarded Certificates CSV records, the import will fail.
Allow duplicate records in Awarded Certificates CSV Loader	Check box	Select this check box to allow Awarded Certificates CSV files to be imported that contain duplicate records (that is, multiple records with the same USERID, CERTIFICATION_TITLE and DATE_ACHIEVED values).

Enable "View Details" for certifications	Check box	Select this check box to enable the View Details option for all certifications accessed via the Learning Center or Review > Career Development Center. Clicking the certification name or selecting View Details from its action menu opens the certification details page. Clear this check box to remove the View Details option from the certification action menu. Clicking the certification name opens the certification PDF if printing is allowed.
Award course completion certificates using	Selector	Course and certification settings can be modified over time due to corrections or changes in delivery. With a CFR license, these changes are tracked and with this option, you can specify whether historical or current settings should be used when awarding certificates. The "using historical settings" is accurate to the point that if no certificate was configured for the course at the completion date, then no certificate is awarded. The "using current settings" resembles the behavior of the LMS without CFR enabled and is recommended for most clients. Changes to the certificate settings do not affect already awarded certificates. **Note**: When using the Training History Loader, you can override this setting by specifying a "Use settings as of" date, which would be used for performing a historical look-up based on the date provided.

Manual Certification Revocation E-mail	Selector	Click the **browse** icon to select the email template used to send the notification when a certification is revoked manually. **Note**: This option is available only if your organization has Cetification History enabled. Notifications are sent depending on individual competency settings and the *Process competency renewals and expiration/revocation notifications only for currently assigned job profiles* System Configuration setting.
Enable Certification History	Check box	Enabling this functionality will retain a history of certifications in the database, add a history report filter as an option on Certification reports, and change the automatic awarding of certifications to factor in deletion dates. **Note**: When not checked, deleted certifications are entirely deleted from the database. This setting will retain the certification in the database, and allow re-awarding the certification when completing requirements after the revocation date.
Automatic deletion of group-awarded certifications	Check box	Enabling this functionality will automatically delete certifications that were awarded by a Job Profile Group or a Competency Group when the user no longer meets the criteria. **Note**: Whether the certification is retained in the database will be based on the "Enable certification history" setting.

Competency Manager Category

Use the table below to configure the system configuration settings in the Competency Manager category.

Setting	Type	Description
Competency Revocation E-mail	Selector	Click the **browse** icon to select the email template used to send the notification when a competency is revoked automatically. Notifications are sent depending on individual competency settings and the *Process competency renewals and expiration/revocation notifications only for currently assigned job profiles* System Configuration setting.
Manual Competency Revocation E-mail	Selector	Click the **browse** icon to select the email template used to send the notification when a competency is revoked manually. **Note**: This option is available only if your organization has Competency History enabled. Notifications are sent depending on individual competency settings and the *Process competency renewals and expiration/revocation notifications only for currently assigned job profiles* System Configuration setting.

Competency Revocation Grace Period Entered E-mail	Selector	Click the **browse** icon to select the email template used to send the notification when a competency that has been configured to be revoked enters the grace period. Notifications are sent depending on individual competency settings and the *Process competency renewals and expiration/revocation notifications only for currently assigned job profiles* System Configuration setting.
Enable Competency History	Check box	Click the check box to enable the application to capture history when competencies are awarded, updated, revoked or the proficiency level changes.
Skip usage check when deleting a competency	Check box	Click the check box to allow a competency to be deleted even if it has been awarded to users.
Competency Learning Module Expiration Reminder Interval (days)	Number (Min=0, Max=9999)	Enter the number of days before competency learning modules expire to send an email notification. The notification period can be overridden per competency setting.
Competency Learning Module Expiration Reminder E-mail	Selector	Click the **browse** icon to select the email template used to send the notification when the validity of a learner's competency module completion is due to expire. Notifications are sent depending on individual competency settings and the *Process competency renewals and expiration/revocation notifications only for currently assigned job profiles* System Configuration setting.

Ad-Hoc Competency Assessment Expired E-mail	Selector	Click the **browse** icon to select the email template used to send the notification when a learner's ad hoc assessment expires. Notifications are sent depending on individual competency settings and the *Process competency renewals and expiration/revocation notifications only for currently assigned job profiles* System Configuration setting.
Enable competency groups	Check box	Select this check box to enable the Competency Group Editor, in which users can create competency groups and assign competencies to them. The Competency Group Editor is available for Learning and Performance licenses only.
Enable job profile groups	Check box	Select this check box to enable job profile groups in the Competency Group Editor. Job profile groups are available for the legacy Performance license only.
Competency Learning Module Renewal E-mail	Selector	Click the **browse** icon to select the email template used to send the notification when a learner's competency module enters the renewal period. Notifications are sent depending on individual competency settings and the *Process competency renewals and expiration/revocation notifications only for currently assigned job profiles* System Configuration setting.
Job Profile Assignment Notification for Assignee E-mail	Selector	Click the **browse** icon to select the email template used to send the notification to users when a job profile is assigned to them.

Job Profile Assignment Notification for Direct Appraisers E-mail	Selector	Click the **browse** icon to select the email template used to send the notification to direct appraisers when a job profile is assigned to their appraisees.
Job Profile Assignment Notification for Job Profile Owner E-mail	Selector	Click the **browse** icon to select the email template used to send the notification to job profile owners when their job profiles are assigned to users.
Job Profile De-Assignment Notification for Assignee E-mail	Selector	Click the **browse** icon to select the email template used to send the notification to users when a job profile is de-assigned from them.
Job Profile De-Assignment Notification for Direct Appraisers E-mail	Selector	Click the **browse** icon to select the email template used to send the notification to direct appraisers when a job profile is de-assigned from their appraisees.
Job Profile De-Assignment Notification for Job Profile Owner E-mail	Selector	Click the **browse** icon to select the email template used to send the notification to job profile owners when their job profiles are de-assigned from users.
Process competency renewals and expiration/revocation notifications only for currently assigned job profiles	Check box	Select this check box to only send competency expiry and revocation notifications to users if the competency is part of a job profile that is currently assigned to them. Additionally, enrollment renewals will only be processed for modules related to the competency of a currently assigned job profile. Clear this check box to send notifications as long as the user is in possession of the competency. Enrollment renewals for competencies will be processed irrespective of the currently assigned job profiles.

Enable job profile group association at the user level	Check box	Select this check box to enable the system to manage the association of individual users with Job Profile Groups, regardless of the job profiles assigned in their user profiles. When this option is selected, administrators can choose to not associate a user with a Job Profile group, even if that job profile is associated with the user.
Status for new Competency is Active by default.	Check box	Select this check box to make newly-created competencies active (Active checkbox selected) by default.
Status for new Job Profile is Active by default.	Check box	Select this check box to make newly-created job profiles active (Active checkbox selected) by default.
Award training completion competencies to use the last course completion date	Check box	Select this checkbox to set the competency issue date to match the completion date of the last course completed.
Update awarded competency issue date when training is completed again	Check box	Select this check box to update the competency issue date when the user completes the training requirements after the competency has already been awarded.
Update awarded competency expiry date when training is completed again	Check box	Select this check box to update the expiry date when the user completes the training requirements after the competency has already been awarded.
Award group certifications when requirements are completed again	Check box	Select this check box to award group certifications when the user completes the requirements after the group certification has already been awarded.

Enrolled Learning Modules Category

Use the table below to configure the system configuration settings in the Enrolled Learning Modules category.

Setting	Type	Description
Date to Display for Learner Enrollment Summaries	Single selection	Select the groups of date types from which the appropriate date is displayed in the Current Courses (new UI) or Current Learning Modules (legacy UI) page, in enrollment widgets, and in the Knowledge Center. The possible dates are listed in order of precedence. In the Knowledge Center, *Available from* information is prepended to the date field where applicable.
Show revision information	check box	Select this check box to show this information in the Current Learning Modules page. This setting applies only to the legacy user interface (that is, when the user's skin is anything other than *PeopleFluent_LMS_Default* and they do not have *Enable new UI* set to Yes in their profile).
Show required information	Check box	See *Show revision information.*
Show credits information	Check box	See *Show revision information.*
Show % complete information	Check box	See *Show revision information.*
Show total training time information	Check box	See *Show revision information.*

Personal Calendar Settings	Check boxes	Select the learning types that will not be displayed in users' Personal Calendar. Select the Restriction check boxes as required. By default, enrolled online modules are shown in the Personal Calendar. If you select *Hide online courses and program sessions without a schedule*, online modules are not shown regardless of the *Hide Learning Type(s)* setting. If you do not select *Hide online courses and program sessions without a schedule*, the date shown is the first launch date. For program sessions without schedule, it is the enrollment date. Classroom sessions without a schedule are not shown in the personal calendar.
Show module attribute information	Check box	Select this check box to display the module attributes for each course in the Current Courses (new UI) or Current Learning Modules (legacy UI) page, Knowledge Center, and course details pages, depending on the Display Areas selected for the module attributes.

Default Enrolled Learning Modules Sort By	Drop-down list	Select the default sort order for courses in the Current Learning Modules page. • Due Date • Module Type • Status • Module Title • Start Date • Required • Enroll Date • Priority This setting applies only to the legacy user interface (that is, when the user's skin is anything other than *PeopleFluent_LMS_Default* and they do not have *Enable new UI* set to Yes in their profile).
Display Start Date on current enrollments date-specific learning types	Check box	When enabled, any Classroom, Workshop, or Virtual Classroom session either directly enrolled or as a submodule to a program, will display the next upcoming session Start Date and Time on the Current Courses page. This change does not affect the Course History or Knowledge Center pages
Sort in Ascending Order	Check box	Select this check box to sort courses in the Current Learning Modules page in ascending order of the sort category selected in *Default Enrolled Learning Modules Sort By*.

Show Progress as Completed for completed status	Check box	If the *Show % complete information check box* is selected: • Select this check box to display 100% for completed modules • Clear this check box to calculate and display the percentage of completion
Initial display of Top-Level Programs	Drop-down list	Select whether to initially show top-level programs collapsed or expanded to reveal their sub-modules in the Current Learning Modules page. PeopleFluent recommends selecting *Expanded* for organizations that provide simple learning program structures, so that learners can view all of their courses at a glance.
Open downloads with	Single selection	For Talent Slate users, select the version to use to open downloads.

eSignature Category

Use the table below to configure the system configuration settings in the eSignature category.

Setting	Type	Description
Learning program completion from	Single choice	Whenever a module within a program is marked completed or finished using, the system will verify that all modules within the LP have been completed. If so, the LP is marked COMPLETED. This setting is useful where users are not allowed to directly change the overall status for their LP, since an administrator would otherwise need to manually mark the LP completed.

Exams Category

Use the table below to configure the system configuration settings in the Exams category.

Setting	Type	Description

Grading for Multiple Choice Questions	Single selection	Select the type of grading to use for multiple choice questions: • All or Nothing • Uniform Partial Credit **All or Nothing** Only full points or zero points can be awarded for the question. For example, if there are two corrected answers, but only one is selected, zero points are awarded. **Uniform Partial Credit** Each correct choice or non-choice is worth 1/*n* of the total value, where *n* is the number of choices. For example, given a five-choice question (A, B, C, D, E), where A and B are the correct answers: • The response A and B is awarded 1 • The response A, B, and C is awarded 4/5 • The response A is awarded 4/5 • The response A and D is awarded 3/5 • The response C and D is awarded 0 Zero points are awarded if: • The question is unanswered • All choices are selected (the participant is guessing) • No correct choices are selected If Uniform Partial Credit and penalty points are configured, each incorrect choice within a given question will be proportionally penalized and the score for the question will always be a value between zero and the full weight.

		In Exam Reviews, questions awarded less than full points will be displayed to the user as incorrect.
Display section page for timed exam	Check box	Select this check box to time the section review and question activity for timed, navigation-based exams. The section page will be shown at the start of each new section. Clear this check box to time only the question activity.
Display expired question in exam	Check box	Select this check box to include any expired questions in an exam if they were selected to be part of the exam prior to expiration. This setting applies to both fixed sections and random sections (including the expired question that was randomly drawn prior to its expiration).
Display retired question in exam	Check box	Select this check box to include any retired questions in an exam if they were selected to be part of the exam prior to expiration. This setting applies to both fixed sections and random sections (including the expired question that was randomly drawn prior to its expiration).
New Questions Have Public Permissions	Check box	Select this check box to assign Unrestricted (All) permissions to new questions added to a question pool, instead of assigning owner only permissions. This option is especially useful if you want to control access to questions at the question pool level rather than having to maintain permissions for each and every question. Note that restricting access to read-only on a question pool still leaves the questions themselves unrestricted.

Show instance number	Check box	Select this check box to show the exam instance number in exam reviews. Each exam instance can include different questions drawn from question pools assigned to the exam template.
Lock frame bar during exam delivery	Check box	Select this check box to lock the frame bars in exam delivery, so that they cannot be resized.
Show question pool	Check box	Select this check box to display, during exams, the full question pool description that questions are assigned to.
Show question pool in exam editor	Check box	Select this check box to display the question pool that the question has been assigned to in the left panel of the exam editor. The lowest three levels will be displayed.
Is Comment Mandatory on Question Status Change	Check box	Select this check box to require the approver to leave a comment when changing the status of the question.
Default Passing Grade	Number	Enter the default passing grade to display in the Exam Editor for new exams. (Changing this value does not affect existing exams.)
Default Pool Summary Level	Number (Min=0, Max=16)	Enter the question pool level at which performance feedback is grouped (that is, summarized) at the end of each exam. Changing this value applies it to new exams only. Enter `0` for no summary.

Question Approval Mode	Single selection	Select the approval mode for question status changes: • Only allow status changes that are consistent with approval workflow (Approval Mode). • Allow arbitrary status changes (Simple Mode) In simple mode, when a question is re-opened from active status, the old version of the question will not be saved.
Report Exam Course Score as Indicated by Marking Type	Check box	Typically, online courses configured with an exam as the launch URL report the final exam score as points. Select this check box to report the score as points or percentage, as specified by the marking type for the exam. Selecting or clearing this check box does not change the score for online courses with previously reported exam scores. This setting applies only to exams configured as a launch URL, not to exams attached to a course.
Check for missing answer(s) before continuing to next page	Single selection	Select an option to specify whether learners can skip exam questions: • All question(s) on page must be answered • Allow user to skip question(s)

Learning modules launched as exams are of	Drop-down list	Select the learning type for learning modules launched as exams (that is, exams created using the Generate Exam Module option). If the selected learning type is disabled in the LMS, the learning modules launched as exams will be assigned the Online learning type. Changing this setting and saving the System Configuration migrates all learning modules launched as exams to the selected learning type.
Allow Non-Gradable Exam Type To Mark Course as Completed	Check box	Select this check box to enable the completion of a Survey exam type to update the user's transcript status for the course to *Completed*.
Questions Pending Approval Reminder Template	Selector	Click the **browse** icon to select the email template used to send emails to question approvers when there are questions pending approval. They are sent at the frequency configured in individual question pools.
Show Exam Disclaimer	Check box	Select this check box to display disclaimer message when a learner launches an exam. They must confirm reading the disclaimer before they can launch the exam. The disclaimer contains standard text that asks the user to confirm their LMS User ID and that they wish to proceed with the exam.

Forum Category

Use the table below to configure the system configuration settings in the Forum category.

Setting	Type	Description
Allow all users to create forums	Check box	Select this check box to enable all users to create new forums. Clear this check box to allow non-administrators to only post to existing forums.
Forum Update Notification E-mail	Selector	Click the **browse** icon to select the email template used to send daily emails to the *Default System User* of the logical domain if the discussion forum has been updated in the past 24 hours. No specific types of updates are checked, so the recipient should be a general forum moderator.
Forum Update Summary Notification E-mail	Selector	Click the **browse** icon to select the email template used to send daily emails to all users who have subscribed to a forum if there have been new posts within the last 24 hours.
Enable option to write an e-mail to the author of a post	Check box	Select this check box to show an Email button on forum posts, so that forum members can email the post's author.
Enable option to view the Profile Summary of the author of a post	Check box	Select this check box to make all user names in the forum links to open the user profile summary. Users may or may not have access to other users' profile summaries, depending on their access permissions and viewing constraints configured in profiles.

General Category

Use the table below to configure the system configuration settings in the General category.

Setting	Type	Description
Sort users by last name?	Check box	Select this check box to initially list user names in alphabetical order of their last name in the Users page, reports and courses.
Show last name first?	Check box	Select this check box to list user names last name first.
Enable User ID in search	Check box	Select this check box to include user IDs in user searches, along with last name and first name. Otherwise, the user search will only search last name and first name.
Enforce Partitioning by Level 1 Organizations	Check box	Role access permissions enable user administrators to restrict the data viewable by users to a specific level (and below) in their organization hierarchy. Select this check box to automatically separate level one groups of users, so that the LMS appears dedicated to their organization.
Allow completed courses to be reopened	Check box	Select this check box to allow learners to reopen previously completed courses from the Knowledge CenterCourse Details. Reopening a course does not change the overall status, but it does allow material to be retaken. So if this option is globally enabled here, the catalog editor allows it to be turned off for individual courses.

Status change to COMPLETED removes module from active list.	Check box	This setting applies only to the legacy user interface (that is, when the user's skin is anything other than *PeopleFluent_LMS_Default* and they do not have *Enable new UI* set to Yes in their profile). Select this check box to automatically remove a course from the user's active list in their Current Learning Modules page when its status is updated to *Completed*.
Always show program with all modules in active list	Check box	This setting applies only to the legacy user interface (that is, when the user's skin is anything other than *PeopleFluent_LMS_Default* and they do not have *Enable new UI* set to Yes in their profile). If this setting is enabled, all modules of a program are kept in the user's active list (Current Learning Modules) regardless of their status, until the program as a whole has been completed. If this setting is disabled, only modules with the status Not Started, In Process, or Session Selection Needed are shown in the active list. Completed modules or modules which are pending approval after a session selection or session transfer will be removed directly.

Optimize for Bandwidth	Check box	This setting applies only to the legacy user interface (that is, when the user's skin is anything other than *PeopleFluent_LMS_Default* and they do not have *Enable new UI* set to Yes in their profile). Select this check box to improve response time and reduce bandwidth usage for several commonly used (but infrequently changed) menus by caching their elements in the browser. Parameters, such as role, language, and skin, are used to force new pages to appear if the learner properties change. If this setting is disabled, a time stamp is set on the pages so that they are refreshed on every login. This option requires that the components.xml entries for the relevant screens have the `<cacheable/>` attribute set, otherwise nothing is cached by the browser regardless of the setting here.
Use Simplified Time Zone List	Check box	Select this check box to simplify the choice of time zones available in the LMS by limiting it to 24 zones instead of listing all ISO-recognized time zones.
Display simplified user preferences	Check box	Select this check box to reduce the number of items shown on the User Preferences tab of the Settings page (**Avatar Menu > My Profile**). Only skin, language, and time zone options will be available.
Withdrawal Renews Auto-Enroll Eligibility	Check box	Select this check box to make learners who have withdrawn from the target course eligible for auto-enrollment. If this check box is cleared, learners who have withdrawn from the target course will no longer be considered eligible for auto-enrollment. Auto-enroll eligibility is calculated when users log in.

Enable certification "Base Month" business logic	Check box	Certifications can have a grace period, which controls certification renewal, and this option enables the configuration and business logic processing for this capability. Several default settings are provided to specify FAA-required handling for airline industry cases.
Prompt users for valid time zone and e-mail settings.	Check box	Select this check box to repeatedly remind users on the widget page to enter a valid time zone or email address in their profile.
Enable User Targeting Template Search Filter?	Check box	Select this check box to make accessible user targeting templates available as a filter. This enables objects with a template as the targeting criterion for permissions or target audience to be searched for. This setting applies to the Learning Modules page, sessions in **Teach > Session Administration**, the Email Template Editor, and the Job Profiles page.
Enable client side sorting if supported	Check box	This setting applies only to the legacy user interface (that is, when the user's skin is anything other than *PeopleFluent_LMS_Default* and they do not have *Enable new UI* set to Yes in their profile). Select this check box to enable column sorting for learning items listed in tables (for example, the Records/Transcript list). When this setting is enabled, users can click the column headers to sort the table on those columns.
Clean-up waitlist automatically	Check box	Select this check box to automatically withdraw waitlisted users from a course waitlist once the enrollment period has expired.

Hide tabs and fields when there are no items to display	Check box	Select this check box to hide tabs that contain no data. This simplifies the display for learners and managers. There is a performance penalty for this setting, so PeopleFluent recommends disabling this setting.
Retain transcript records for cancelled sessions.	Check box	Select this check box to retain learners' transcript entries—with a status of *Cancelled*—for courses that are cancelled. These records can be useful in reports and reviews for re-targeting learner sessions.
Retain transcript records for user withdrawals or withdrawal equivalents.	Check box	Select this check box to retain learners' transcript entries—with a status of *Withdrawn* — for courses they withdraw from. These records can be useful in reports and reviews for re-targeting learner sessions.

Show other resources tab (tabbed interface only)	Check box	Select this check box to enable the option to show learning modules on the Other Resources page in the Learning Center. When this setting is enabled, a similarly labelled check box is shown in the **Catalog Editor > Module Properties**. You can then select that option for individual learning modules as required.
		
		The Other Resources page must be included in the navigations.xml file used for the LMS's skin, as shown in this example navigations.xml extract:
		
		`<item labelKey="label.LearningCentre" txCode="TABLISTSESSIONS">`
		`<menu cssClassName="submenu">`
		`<item labelKey="heading.currentCourses" txCode="TABLISTSESSIONS" />`
		`…`
		`<item labelKey="label.Other_Resources" txCode="OTHERRESOURCES" />`
		`…`

Enforce Token-Processing Business Logic	Drop-down list	Tokens can be used to pay for courses in the LMS. When courses have a token cost, certain business rules may be applied during enrollment processing (for example, user credit balance must be higher than the course cost). Select an option from the drop-down list to enforce the token processing rules: • Do not enforce • Enforce for self-enrollments • Enforce for self-enrollments and enrollment wizard By default these rules are not enforced as most environments do not use token payments.
Enforce Skillsoft License Control	Check box	Select this check box to prevent learners from launching Skillsoft courses they are enrolled in or choose to re-open. At launch time, a message is displayed indicating they should contact an administrator if they are no longer allowed to use the course. The objective of this option is to limit charges for Skillsoft launches to those users with currently active licenses. Selecting this check box does not prevent a user from enrolling in a Skillsoft course, if they have proper catalog permissions, but for courses with a vendor value of *Skillsoft*, only users with user attribute 8 set to *Skillsoft* are allowed to launch the course.
Number of Active Users E-mail Alert Threshold	Number (Min=0, Max=100)	Enter a percentage number (without %). When the number of Active users exceeds the specified percentage of the number of users allowed by the license, an email alert is sent to the default system administrator user.

Enable automatic completion of learning programs	Check box	Select this check box to automatically set the overall status of learning programs to *Completed* when all of its constituent learning modules are completed. If this check box is cleared, learners, their managers or direct appraisers will need to update the overall status of learning programs to Completed.
Automatically create learning objects when using dataloader	Check box	Select this check box to enable by default the option to automatically create new learning objects when importing training records in the Training Records CSV Loader. If a learning program, module or session specified in the CSV file does not exist in the LMS, it will be created only if the *Create learning objects for new Learning IDs found in the file* check box is selected in the Training Records CSV Loader.
Initial Display View of Learning Path	Drop-down list	Select from the drop-down list whether the Learning Path hierarchy is expanded or collapsed when users navigate to it. Select **Collapsed** to show only the first level items, or **Expanded** to show all lower level items as well. Users can always expand and collapse the hierarchy from within the Learning Path itself.
Initial Display Layout of Learning Path	Drop-down list.	Select Horizontal to display the Learning Path progressing from left to right, or Vertical to display the Learning Path progressing from top to bottom.
Hide completed job profiles in learning path	Check box	Select this check box to remove an assigned job profile from the user's Learning Path, if they have completed all of the competencies it requires.

Default Reserve seats for learner enrollments pending approval	Check box	Select this check box to assign seats for classroom courses to learners whose enrollment is pending approval.
Default Title and ID Format when creating a new Role	Drop-down list	Select from the drop-down list the format to use for the title and ID of new system roles: • Title • Title (ID) • (ID) Title
Ignore Prerequisites and Enrollment Approval Steps for Automatic Enrollments	Check box	Select this check box to skip prerequisite checks and approval steps during automatic enrollment. Clear this check box to disqualify learners from automatic enrollment if they do not have enrollment approval or they have not fulfilled prerequisite requirements for the course.

Trusted Sites for Proxied Course Launches (one per line)	Text box	Specify a full HTTPS URL (for example, `https://www.example.com`) to require site verification (HTTPS), or a simple hostname (for example, `www.example.com`) to allow unverified sites (HTTP). To specify a user profile for newly-created accounts, append `|profile=` followed by the profile ID; for example, `|profile=my-profile` (effective only if the property *Automatically create user accounts and enrollments for proxied course launches* is enabled). To specify a user ID template, append `|template=` followed by the template, for example, `|template={Student_ID}@example.com`. Proxied launch enables another AICC-conformant LMS (which could be another PeopleFluent Learning LMS instance) to launch a course registered in the LMS, such that progress tracking information is recorded in the LMS and also relayed to the launching LMS. It is not necessary for the course to support AICC communication directly—it could be a SCORM course or LMS exam, for example—AICC communication is simply the mechanism that relays progress tracking information to the launching LMS.
Automatically create user accounts and enrollments for proxied course launches	Check box	Select this check box to automatically create user accounts and enrollments in the LMS for proxied course launches. If you clear this check box, learners will not be able to launch proxied courses if they do not have an LMS user account, or if their account does not have an active enrollment in the course.

Default IE Compatibility Mode	Drop-down list	Select from the drop-down list the IE compatibility mode for the LMS: • 7 • EmulateIE7 • 8 • EmulateIE8 • Edge For organizations unable to upgrade their users' browsers from Internet Explorer (IE) to Edge, you can select an older version of IE to ensure the LMS pages render correctly.
Useful Links URLs	Text box	Enter one or more links, one per line, and specify name, URL and (optionally) language, separated by a vertical bar in square brackets. For example, [PeopleFluent|http://www.peoplefluent.com|en]. These links appear in the header area of the Manage Center when the new UI is enabled, and in the header area of all pages when the legacy UI is enabled.
Footer Links URLs	Text box	Enter one or more links, one per line, and specify name, URL and (optionally) language, separated by a vertical bar in square brackets. For example, [PeopleFluent|http://www.peoplefluent.com|en]. These links appear in the footer area of all pages.

Number of Organization Extended Description Levels	Number (Min=0, Max=50)	This setting specifies the number of organization levels displayed in an organization structure, from the level at which the report is run, up to the highest level in the hierarchy. For example, working up the hierarchy from right-to-left, *HK/Accounting* is two levels, while *ALL/My Company/HK/Accounting* is four levels. This extended description appears in many LMS reports, so specifying the number of levels can help to format your reports. The number of levels can range from 0 to 50, where 0 means *use all levels in the hierarchy, from the lowest to highest*. For example, if your organization hierarchy is *ALL/Level1/Level2/Level3*, and you run a report for the Level3 organization: • Setting the number of levels to 3 will include the organization structure *Level1/Level2/Level3* in reports that include the organization extended description. • Setting the number of levels to 1 will include the organization structure *Level3*. • Setting the number to 0 or 4 will include the organization structure *ALL/Level1/Level2/Level3*. When you change the *Number of organization extended description levels* System Configuration setting, you must then click **Regenerate Extended Description** in Organization Maintenance. This regenerates the extended description attribute of all organizations in the LMS.
Show links for RSS feeds	Check box	Select this check box to show RSS links on the widget page.

Exclude closed user accounts in reports set to be checked by default.	Check box	Select this check box to enable the *Exclude closed user accounts* option in standard reports. This check box will be selected by default in each report.

Enable WYSIWYG Editor	Check box	Select this check box to enable the WYSIWYG editor in the following pages: • Question Editor, Text field for questions. • News Editor, Text field for articles. • Email Template Editor, message field. • Catalog Editor > Module Properties tab, Description field. • Catalog Editor > Session Properties tab, Description field. • Catalog Editor, module attribute value of text area type. • Catalog properties page, Comments field. • Exam Editor, Description field. • Appraisal Templates > Structure tab, Description field for appraisal sections. • Discussion forum, topic Description field. • Class Resources page, Description field • Competency Assessment • HTML Widget, Widget Content field. • Organization Maintenance (create or edit), Imprint field. • Job Profile (create or edit), Description field. • Competency (create or edit), Description field. • Terms of Use Manager, Text field. • Catalog Editor, Support Contact field. • Knowledge Center, Personal Notebook.

		• Question Editor, additional comments fields (Hints, Pre-Comment, Explanation). • Question Editor > Media tab, Other (HTML) field. If the WYSIWYG editor is enabled, the contents of these fields will include HTML tags even if the contents have not been edited. Saving the page causes the WYSIWYG editor to convert the text to HTML automatically.
Default Report Type	Drop-down list	Select from the drop-down list the default report type when creating new reports from the Report Wizard: • Certification History • Class Resources • Competency Modules • Courseware Information • Exam Results • Exam Results (Direct) • Job Profile • Learning Program Detail • Module Information • Training History • Training History (External) • User Competency • User Information • Withdrawn User Details

Default Report Format	Drop-down list	Select from the drop-down list the default report format when creating new reports: • CSV (Comma delimited) • Simple HTML • HTML Document • PDF • Microsoft Excel Workbook
Show loading icon	Check box	Select this check box to show a loading icon on some of the pages where background processing can keep system resources busy. This option works best for frame-oriented skins.
Number of Self-Enrolled Classroom(s) per Year	Number (Min=0, Max=1000)	Enter the maximum number of self-enrollments allowed per calendar year (January 1 to December 31) for classroom learning types. Enrollments pending approval count towards the number but denied enrollment requests do not.
Show additional enrollment information in records/transcript.	Check box	Select this check box to show additional enrollment information and charged cost center in the Records/transcript page. An administrator must enable the fields to be included in **Enrollment Policy Editor > Edit Additional Enrollment Information**. The fields will be editable for users with unrestricted access to Records/transcript (that is, administrators and instructors).
Default Currency	Drop-down list of global currencies.	Select the default currency used in the LMS.
Number of Years Access Violation Reports are retained	Number (Min=0, Max=10)	Enter the maximum number of years to keep Access Violation Reports. Outdated Access Violation Reports will be removed by a background task run monthly.

Automatically hide the instruct menu if the current user is not an instructor.	Check box	Select this check box to hide the Teach menu automatically if the user is not assigned as an instructor to any learning programs or courses. The *Instructor* role access permission takes precedence over this configuration. If a user's system role does not have read-only access to the *Instructor* feature (Review Features > Instructor) then they cannot access the Teach menu.
Maximum number of rows displayed under selector search results	Number (Min=0, Max=100000000)	Enter the maximum number of results shown in selector pages.
Organization Selector Format	Drop-down list	Select the default format for the list of organizations displayed in the Organization Maintenance page: • Tree Format (Default) • Flat Format Tree Format shows an expandable tree-view of your organizations. Flat Format shows all of the organizations at once, with their level in the hierarchy indicated by a forward slash (/). You can toggle between the Summary View and a Flat View in the Organization Maintenance page.

Enable Course Equivalency	Check box	Select this check box to enable rules to be configured so that substitute courses or programs can be completed instead of the target courses or programs, and are treated as an equivalent unit of training. For more information about course equivalency, see About Course Equivalency. Once this setting is enabled, if any course equivalency rule has been created, this setting can not be disabled.
Disallow re-launch once the course has been completed	Check box	Select this check box to prevent learners from re-launching courses they have completed. Clear this check box to enable learners to re-launch courses. Re-launched courses must be completed again to be shown in reports as Completed. This is because most reports use the tracking data from the most recent attempt.
Return to existing course window	Check box	Select this check box to enable minimized or hidden course windows to be resumed, if possible, when that course is re-launched. Clear this check box to re-start the course every time it is launched.

Require Direct Appraiser or Organization Approver to exist for User CSV upload	Check box	Select this check box to require the Direct Appraiser or the Organization Approver to exist in the LMS, or be in a row for creation in the uploaded User CSV file before being assigned to another user or organization, respectively. If this check box is cleared, and a Direct Appraiser that does not exist in the LMS is specified for one or more new users in the User CSV file, those users will not be created. Likewise, users will not be assigned to organizations if the Organization Approver for the organization does not exist at the time of import.
Number of Participants to show for Learning Groups in Review Learning Center	Number (Min=1, Max=9999)	Enter the number of participants to show in the Learning Group page in **Career Development Center > Review Learning Center**. The Learning Group pages lists the participants who enrolled in the same learning modules as the selected learner. The Learning Group page must be enabled for this setting to take effect.
Display Learning Groups in Review Learning Center Summary	Check box	Select this check box to enable the Learning Group page in **Career Development Center > Review Learning Center**.
Require comments when submitting a Peer Comment	Check box	Select this check box to make the Your Comment field mandatory when learners submit a Peer Comment in the Knowledge Center or Catalog Browser. Clear this check box to allow learners to rate a course without having to leave a comment.

Enable Login Notifications	Check box	This setting applies only to the legacy user interface (that is, when the user's skin is anything other than *PeopleFluent_LMS_Default* and they do not have *Enable new UI* set to Yes in their profile). Select this check box to enable the Login Notification page. This page shows information about deadlines that can block training, expired deadlines, and other information. If there are any notifications, the Login Notifications page is displayed after authentication.
Use default login page for eCommerce	Check box	Select this check box to use the default LMS login page for eCommerce users to log in and pay for a course. Clear this check box to use the eCommerce login page (eCommerceLogin.wm) for eCommerce users. This page is can be customized by editing the HTML.
Enable Enrollment Schedule Conflict Detection	Check box	Select this check box to enable immediate or direct feedback if sub-session schedules overlap with the dates of existing active transcripts. This option applies to learning types with sub-session schedules, such as classrooms, workshops and virtual classrooms. Conflicts are not detected for sessions that have no schedule (no start date and end date) to compare. For a user with multiple job assignments, schedule conflict detection checks against all the aggregated active transcripts for the user.

Additional information shown in User Profile Summary for approvers	Check box	This configuration setting is limited to enrollment approvals. An approver has the option to view a User Profile Summary for the user who asks for approval, displayed per default Name, Job Title and Email of the user. Select the check boxes to specify which additional information about the user will be displayed in the User Profile Summary: • **Show Employment Information**: Employment Country, Department, Location, Organization. • **Show Extended Employment Information**: Employee number, Join Date, Manager Name, Manager E-Mail, Cost Center. • **Show Contact Details**: Company Name, Address 1, Address 2, City, Province/State, Postal Code/ZIP, Country, Phone, Telefax, Mobile. If no block is enabled the User Profile Summary shows only Name, Job Title and Email.
Enable Accessible Alerts and Facet Search Experience	Check box	Select this check box to make the LMS display alerts in a way that is appropriate for users with disabilities. Also, the Facets items in Faceted Search will have improved accessibility.
Number of Days Background Task Logs are retained	Number (Min=1, Max=9999)	Enter the maximum number of days to keep background task logs. Outdated background task logs are deleted by the Monthly Housekeeping task.
Keep users logged in for 30 days	Check box	Select this check box to keep users logged into the LMS for 30 days.

Include private events when viewing instructors' calendar information	Check box	Select this check box to display personal events (those marked as *Private*) in Class Resource Manager calendars.
When viewing Personal Events for other instructors in Class Resource Manager calendars:	Single option	Select an option to specify the behavior when viewing personal events for other instructors in Class Resource Manager calendars: • Allow create/edit and display Event Information • Do not allow create/edit and display as "Busy" only Select **Do not allow create/edit and display as "Busy" only** to hide in calendars events marked as Free in Microsoft Exchange Server.
GoToTraining API URL	Text box	Enter the GoToTraining API URL for GoToTraining courses. For example, `https://api.getgo.com`.
Allow back-dating of enrollment and completion dates via the Enrollment Wizard	Check box	Select this check box to allow anyone using the Enrollment Wizard to set the Enrollment Date and Completion Date to be any date in the past

Goals Category

Use the table below to configure the system configuration settings in the Goals category.

Setting	Type	Description
Goal Assigned Notification to Goal Owner E-mail Template	Selector	The notification that is sent to the goal owner on assignment of a goal.
Goal Modified Notification to Goal Owner's Direct Appraiser E-mail Template	Selector	A notification using this e-mail template will be sent to the Goal Owner's Direct Appraiser when the Goal Owner modifies the performance or development goal. If no e-mail template is configured, no notifications will be sent to the Goal Owner's Direct Appraiser when the Goal Owner modifies the performance or development goal.
Goal Modified Notification to Goal Owner E-mail Template	Selector	A notification using this e-mail template will be sent to the Goal Owner when a reviewer modifies the performance or development goal. If no e-mail template is configured, no notifications will be sent to the Goal Owner when a reviewer modifies the performance or development goal.
An e-mail is sent to owners of goals that are linked to an organizational goal that has been changed	Selector	A notification based on the selected e-mail template will be sent to owners of goals that have been linked to the edited organizational goal. Goal changes that will trigger the notification do not include changes in tracking data and ownership.
Completion Reminder to Goal Owner E-mail Template	Selector	The completion reminder E-mail that is sent to the goal owner at a time before target date and frequency as specified in the goal.

Completion Reminder to Goal Owner's Direct Appraiser E-mail Template	Selector	The completion reminder E-mail that is sent to the goal owner's direct appraiser at a time before target date and frequency as specified in the goal.

Home Page / Widget Page Category

Use the table below to configure the system configuration settings in the Home Page/Widget Page category.

Setting	Type	Description
Number of Enrolled Courses to Display	Number (Min=0, Max=99)	Enter the number of active courses shown on the Home page in the legacy UI or Widget page (TX=WIDGETCONTAINERPAGE) in the responsive UI.
Number of News Articles to Display	Number (Min=0, Max=9999)	Enter the number of news articles to display in the News widget on the Home page in the legacy UI or Widget page in the responsive UI.
Number of RSS Feeds to Display	Number (Min=0, Max=9999)	Enter the number of RSS feed items to display in the RSS Feed widget on the Home page in the legacy UI or Widget page in the responsive UI.
Show images on RSS feeds	Check box	Select this check box to show the RSS channel's image beside the feed.
Show all enrollment types (unchecked implies Online only)	Check box	Select this check box to show courses of any learning type on the Home page in the legacy UI or Widget page in the responsive UI. Clear this check box to show only online learning types.
Show Contact Author for news articles?	Check box	Select this check box to add a Contact Author link at the end of news articles in the News widget on the Home page in the legacy UI or Widget page in the responsive UI. In the responsive UI Home page, this link is shown only when news articles are opened in a full page. Users can click the link to email the author.
Show username (Deprecated)	Check box	Not used.
Show by enrollment date (unchecked implies by deadline then by last accessed date)	Check box	Select this check box to sort the Enrollments List widget by enrollment date (most recent first).
Home Page Format (Deprecated)	Number (Min=0, Max=5)	Not used.
Display Available Links on Home Page (Deprecated)	Check box	Not used.

Links to display in Available Links Widget (one per line and specify name, URL, and target separated by vertical bar in square brackets e.g., [PeopleFluent|http://www.peoplefluent.com|_blank])	Text Box	Enter one or more URLs to display in the Available Links widget.
Show date created for news articles on the home page (Deprecated)	Not used.	
Display job profile status on home page (Deprecated)	Check box	Not used.
Show exam access code input	Check box	Select this check box to show exam access code input in the Exam Registration widget on the Home page in the legacy UI or Widget page in the responsive UI. Access codes must be configured for exams in order for learners to enter them here.
Number of rows to display in Token Usage Summary Widget	Number (Min=1, Max=9999)	Enter the number of rows to display in the Token Usage Summary Widget on the Home page in the legacy UI or Widget page in the responsive UI. The Token Usage Summary Widget lists token credits and debits, sorted by transaction date descending.

Knowledge Center Category

Use the table below to configure the system configuration settings in the Knowledge Center category.

Setting	Type	Description
Knowledge Center Enabled	Check box	Select this check box to enable the Knowledge Center or all courses.
Module always launches via Knowledge Center.	Check box	Select this check box to open courses in the Knowledge Center instead of launching them directly. This option ensures that learners see the course information in the Knowledge Center. This option can be overridden on an individual basis in the Catalog Editor.
Module Launches	Single selection	Selection one of the options to specify where courses can be launched from: • Allow module launches from program and module Knowledge Centers • Allow module launches from module Knowledge Centers only • Do not allow module launches from Knowledge Centers
Change classroom status on First Knowledge Center Entry	Check box	Select this check box to update the Overall Status of a classroom session from *Not Started* to *In Progress* when learners open the course's Knowledge Center for the first time. This enables the LMS to track learners' online activity associated with classroom sessions. This always happens for online learning types but may not be wanted for classroom sessions.

AREA: Show certification area	Check box	Select this check box to enable the option in the Catalog Editor > Knowledge Center Options page to show this area in the Knowledge Center. Clear this check box to disable this area for all courses. The Catalog Editor option to show it will be disabled.
AREA: Show contact list area	Check box	See *AREA: Show certification area.*
AREA: Show course summary area	Check box	See *AREA: Show certification area.*
AREA: Show evaluation area	Check box	See *AREA: Show certification area.*
AREA: Show forum area	Check box	See *AREA: Show certification area.*
AREA: Show instructor list area	Check box	See *AREA: Show certification area.*
AREA: Show news area	Check box	See *AREA: Show certification area.*
AREA: Show notepad area	Check box	See *AREA: Show certification area.*
AREA: Show peer comments area	Check box	See *AREA: Show certification area.*
AREA: Show references area	Check box	See *AREA: Show certification area.*
AREA: Show status change area	Check box	See *AREA: Show certification area.*
AREA: Show exam area	Check box	See *AREA: Show certification area.*
AREA: Show picture area	Check box	See *AREA: Show certification area.*
AREA: Show About Me for the instructor	Check box	See *AREA: Show certification area.*

AREA: Show reference share area for instructors	Check box	See *AREA: Show certification area.*
AREA: Show file share area	Check box	See *AREA: Show certification area.*
AREA: Show homework drop box	Check box	See *AREA: Show certification area.*
AREA: Show marked/ reviewed homework	Check box	See *AREA: Show certification area.*
AREA: Show transcript area	Check box	See *AREA: Show certification area.*
AREA: Show assessment workflow area	Check box	See *AREA: Show certification area.*
AREA: Show quick evaluation area	Check box	See *AREA: Show certification area.*
AREA: Show Module Attributes	Check box	See *AREA: Show certification area.*
For Program Module, sort sub-modules by	Drop-down list	This setting specifies the default setting for how program sub-modules are displayed in the program's Knowledge Center. Course administrators can update this setting on a per module basis in the Catalog Editor > Knowledge Center Options page. Select **Required/Elective** to display sub-modules in two separate sections - Required Modules and Elective Modules. Select **Defined Order** to display the sub-modules in one section, in the order defined in Module Assignment page in the programs' session properties.

Mail Category

Use the table below to configure the system configuration settings in the Mail category.

Setting	Type	Description
Include iCalendar attachments in (enrollment confirmations, approved notifications and instructor change notifications)	Check box	Select this check box to include iCalendar attachments in enrollment confirmations, approved notifications and instructor change notifications. Learners and instructors can use iCalendar attachments to import scheduled course sessions into a calendar application such as Microsoft Outlook. Attachments are included only if at least one of the start date and the end date is specified.
Deliver iCalendar Notifications as E-mail Attachment(s)	Check box	Select this check box to deliver iCalendar notifications as email attachments. This enables multiple sub-session calendar entries to be included. Sending iCalendar notifications as an attachment requires recipients to manually accept each sub-session to record them in the local calendar. Clear this check box to send iCalendar notifications as an single email calendar content item (with a single start to end date range). This is the default setting.
Add course description to iCalendar attachment	Check box	Select this check box to add course descriptions to iCalendar attachments. Clear this check box to include only the date, title, and location information.

The GMT offset in iCalendar reflects daylight saving time adjustments.	Check box	Select this option to reflect daylight savings time adjustments in the GMT offset in iCalendar events published by the LMS. By default, this option is disabled, so the iCalendar published by the LMS will not account for any daylight saving adjustments. For example, there is no adjustment if learners have enrolled a course in February that will start in May.
Request responses in iCalendar	Check box	Select this check box to request course invitation responses in iCalandar. If learners provide a response, the course organizer can track whether learners have accepted, tentatively accepted, or declined. Learners can choose to not provide a response.
New User Welcome E-mail	Selector	Click the **browse** icon to select the email template used to send the welcome email to new users. The Welcome Email Event Handler checks for users added within the last 30 days and at the point at which they have a valid email address (that is, containing the "@" character) and an active status (not *Closed*, *Deleted*, *Pending*, *Suspended*, or *Inactive*), the email is sent and the is date recorded in the user statistics. This information is shown in the User Editor's Status tab for each user.
The System Default Classroom-Session-Start Reminder Template	Selector	Click the **browse** icon to select the email template used to send the course start reminder emails to participants and instructors.

# Days Before Course Starts to Send System Reminder E-mail	Check box	Enter the number of days before the course start date to send the Classroom Session Start email reminder (selected above).
Send Gentle Reminder to Approver	Selector	Click the **browse** icon to select the email template to be used when a learner clicks the *Send Gentle Reminder to Approver* button for an enrollment approval request.
Combine e-mail for To and CC recipients	Check box	For emails configured via the Email Template Editor and sent from the Email form in the Participants page, select this check box to send a single email for To and CC recipients. The CC recipient may see the external approval link in approval emails, which in turn allow the CC recipient to approve the enrollment. However, a separate email will be forwarded if the user has email forwarding configured.
Send to Manager E-mail when the recipient is Direct Appraiser	Check box	Select this check box to send an email to a learner's manager if the recipient of the email is the learner's direct appraiser.
Use Trusted Email as Sender Defined	Check box	For organizations that have email whitelist filters, select this check box to set the sender as the Reply-To email and the trusted email specified will be used as the Sender email.

Online Payment Category

Use the table below to configure the system configuration settings in the Online Payment category.

Setting	Type	Description
Enable online payment	Check box	Select this check box to enable online payment for courses. If the shopping cart is also enabled, the Add to Cart button is shown in the Course Details page for courses that require online payment. At least one external payment gateway or plugin must be set up for the LMS to accept online payments.
Enable shopping cart	Check box	Select this check box to show the Add to Cart button in the Course Details page for courses that require online payment. Clicking the button adds the course to the shopping cart. This setting also requires Online Payment to be enabled.
Payment plugin URL	Text box	Enter the URL for the payment plugin used to process online payments. When a user proceeds to checkout for a course with online payment, the LMS sends a request to the payment plugin asking it to collect payment for the amount (and currency) related to the specific purchase. This field must be cleared if the LMS is going to be configured to use one of its native payment gateways. Once a payment gateway has been configured, this field will not appear in the System Configuration page.

Payment plugin key	Text box	Enter the payment plugin key. This is provided by the payment service. This is a secret key known only to the LMS and the payment service, and is used to generate and validate payment messages. This field must be cleared if the LMS is going to be configured to use one of its native payment gateways. Once a payment gateway has been configured, this field will not appear in the System Configuration page.
Allow payment plugin to view shopping cart contents	Check box	Select this check box to enable the payment plugin to view the courses in the shopping cart.
Allow enrollment approval with online payment	Check box	Select this check box to require an approver to complete a one-step enrollment policy to pay for courses.
Online Payment Additional Charges	Text box	Enter, as a percentage of the course charge, an additional payment amount, if required. Decimals must use a comma instead of a period (for example, 1.35%).
Payment successful e-mail template	Selector	Click the **browse** icon to select the email template used to send emails to the learner for each course purchased.
Enable international credit card input form	Check box	Select this check box to enable a country-based credit card input form with country-specific fields, such as States for U.S. and Provinces for Canada.

Prompt for card type	Check box	Select this check box to include a card type selector on the payment form. Supported types are: • Visa • Mastercard • Switch • Solo • Delta • Debit Mastercard This must be enabled if your payment gateway accepts Switch or Solo cards, which require additional information from the user.
Prompt for Name on Card	Check box	Select this check box to prompt the user to enter the name on the card when checking out. This information is sent to the payment service.
Prompt for Card Security Code	Check box	Select this check box to prompt the user to enter the security code on the card when checking out. This information is sent to the payment service.
Prompt for Street Address	Check box	Select this check box to prompt the user to enter the billing address street address when checking out. This information is sent to the payment service.
Prompt for City	Check box	Select this check box to prompt the user to enter the billing address city when checking out. This information is sent to the payment service.
Prompt for State, Province, Prefecture, or County	Check box	Select this check box to prompt the user to enter the billing address state, province, prefecture or county, when checking out. This information is sent to the payment service.

Prompt for Zip or Postal Code	Check box	Select this check box to prompt the user to enter the billing address zip or postal code when checking out. This information is sent to the payment service.
Prompt for Country Name	Check box	Select this check box to prompt the user to enter the billing address city when checking out using the international form. This information is sent to the payment service.
Prompt for purchase order reference code	Check box	Select this check box to prompt the user to enter the purchase order reference code when checking out. This information is sent to the payment service.
Token Purchase E-mail	Selector	Click the **browse** icon to select the email template used to send emails on successful payment when purchasing token packages. The total cost and breakdown of purchases can be included in the email by including the {Purchased Tokens} parameter.
Allow Token Discounts	Check box	Select this check box to apply any payment plan discounts to the course final token price.
URL of Payment Agreement	Text box	Enter a link to the payment agreement (if used), which users must accept before they can proceed to the payment process. This link is shown on the credit card form. The URL can be any valid HTTP address. An absolute URL (for example, *http://www.mysite.com/agreement.html*) or a relative URL (for example, */ekp/nd/fresco/filerepository/agreement.html*, where *ekp* is the domain name).

In approval workflows, tokens are paid by	Single selection	Select who pays for courses purchased with tokens: • Final Approver • Enrollment Requester
Administrator E-mail	Text box	Enter the email address of the LMS administrator responsible for configuring online payments.

Performance Review Category

Use the table below to configure the system configuration settings in the Performance Review category.

Setting	Type	Description
Appraisal completion reminder interval (days)	Number	An appraisal completion reminder e-mail will be sent to both the appraiser and the employee after the specified number of days for appraisals that have yet to be completed. To disable reminders, specify an interval of 0 days.
Appraisal Start Reminder Interval (months)	Number	An appraisal start reminder e-mail will be sent to the employee once the specified number of months have elapsed since the last appraisal was completed. To disable reminders, specify an interval of 0 months.
Right-to-Reply Period (days)	Number	Once an appraisal has been completed and the right-to-reply option for the employee has been enabled, then for a limited period after the appraisal completion, the employee can go back into the performance review and submit a response to the reviewer's final comments. This is possible only within the right-to-reply period. Once the period is over, the employee will no longer be able to enter a response. To not set a time limit, specify a period of 0 days.
Latest completed annual appraisals can be viewed by	Single choice	This option controls who should be able to view a user's latest completed annual appraisal.

Person Information Processor Category

Use the table below to configure the system configuration settings in the Person Information Processor category.

The Person Information Processor is a daily background task that runs on all transcripts in the LMS database. It helps determine learners' program completion status, and also includes the following competency-related tasks:

- Auto Competency Revocation
- Competency Completion
- Expired Ad hoc Assessment Competency Revocation
- Expired Modules Competency Revocation
- Expiring Modules Competency Reminder

Setting	Type	Description
Number of Database Connections In Use For Task Suspension	Number (Min=1, Max=1000)	Enter the maximum number of database connections that can be in use at any time, before suspending the task.
Threshold of the Longest Connection For Task Suspension (minutes)	Number (Min=1, Max=1000)	Enter the maximum duration (in minutes) allowed for a database connection, before suspending the task.
Number of Past Days to Process Competencies	Number (Min=1, Max=1000)	Enter the number of past days to backtrack to process unassociated competencies that are potential for award, this would speed up the daily processing when the number of past days is defined, otherwise the default is 0 which means the system will process all competencies every day.
Include non-Active Users in Competency Processing	Checkbox	Select to enable the Person Info Processor task to include non-active users in its competency processing. Suspended and closed accounts will be processed last in the queue after active accounts.

Records-Transcript Category

Use the table below to configure the system configuration settings in the Records-Transcript category.

Setting	Type	Description
Record all withdrawals (except withdrawals performed using the group withdrawal function)	Check box	Select this check box to record all withdrawals, including withdrawals from learning modules inside learning programs, with the exception of withdrawals performed using the Group Withdrawal function. Users who are *Waitlisted* or *Pending Approval* do not have a withdrawal record created, as they are not yet considered enrolled.
Simplified Tracking Data Display	Check box	Select this check box to replace the detailed CMI tracking data in learners' Records/Transcript History with a link to open it. This can be useful as CMI tracking data can include more details than the average user needs to see. Objectives status information is still viewable by clicking on the link provided. The Transcript History is accessible via the user's Records/Transcript page or using the Training History report type in the Report Wizard.

Level of Visible Transcript Detail for learners	Drop-down list	Select the level of detail for learners when viewing the Records/Transcript page: • Details and Overall Progress • Details, Overall Progress, and Individual SCO Progress • Details, Overall Progress, Individual SCO Progress, and Course Interactions The last two options apply to SCORM courses only. This setting affects only the learner's view of their transcripts. The reviewer's view is configured in Organization Maintenance page, when creating or editing an organization.
Hide objectives for Skillsoft Business Skills courses	Check box	Select this check box to hide the detailed CMI tracking data in users' Records/ Transcript for Skillsoft Business Skills courses. These courses provide very detailed but complicated objective status information that may be confusing to non-technical learners. All tracking data is still recorded in the LMS, and is available for reporting, but it is not shown to the learner.
Use Last Score rather than Highest Score as the default score for an activity (affects transcript listings and roll-ups)	Check box	Select this check box to use the highest score obtained in an exam for summary reports and Records/Transcript. Clear this check box to use the most recent score.
Mastery Score for NETg Cookie-Based Courses	Number (Min=0, Max=99)	NETg cookie-based tracking data primarily contains raw score data with few status indicators. You can enter the minimum score, at a global level, required to pass courses that use NETg cookie tracking.

Lesson Status for NETg Cookie-Based Courses After Mastery Score Has Been Achieved	Drop-down list	If you have specified a mastery score for NETg cookie-based courses, you can select the Lesson Status for passing the course: • Passed • Completed
Show revision column on records/transcript tab	Check box	Select this check box to show the course revision in the Records/Transcript page.
Show credits column on records/transcript tab	Check box	Select this check box to show the course credits in the Records/Transcript page.
Display module attribute(s)	Check box	Select this check box to show the module attributes in the Records/Transcript page.
Record progress after reopening a course	Check box	Select this check box to record learners' course progress when they re-open a course. This updates launch times and scores even though the transcript has reached a final status.
External Training Record Approval Request E-mail Template	Selector	Click the **browse** icon to select the email template used to send emails for external training record approval requests.
External Training Record Approved E-mail Template	Selector	Click the **browse** icon to select the email template used to send emails to learners for external training record approvals.
External Training Record Approval Denied E-mail Template	Selector	Click the **browse** icon to select the email template used to send emails to learners when external training record approval requests are denied.
Enable third-party transcript viewing permission	Check box	Select this check box to enable Third-Party Transcript Viewing Permissions in the Catalog Editor > Define Module Security page. This permission setting specifies which third-parties have read-only and unrestricted access to learners' transcripts during the review process.

Enforce Approval for External Training Record Creation and Updates	Check box	Select this check box to enforce the approval process for creating and updating external training records. If you enforce the approval process, you must select the email templates used to send approval requests and responses.
Require Org in Auto Enroll Targets	Check box	Select this check box to require all targets for auto-enrollment set in the Catalog Editor to include at least one organization. This helps to prevent accidental auto-enrollment assignments to a larger community than intended. Once enabled, this option also checks for the organization requirement for all existing rules at execution time and will ignore assignments for courses without an organization target.
Show session name column on records/ transcript tab	Check box	Select this check box to show session names in the Records/Transcript page.
Enable Transcript History	Check box	Select this check box to record overall status changes, session transfers, session selections and date updates in a Transcript History. This page is accessed via the user's Records/Transcript page or using the Training History report type in the Report Wizard. To see the Transcript History link on the records/transcript page, users must have a role with read-only access to the Transcript History feature in System Roles > Learner-Oriented Features > Learn Features.

Enable Using Last Committed Lesson Status	Check box	Select this check box to set the enrollment status of the most recent course attempt as Completed or Failed (as appropriate). Clear this check box to keep the first Completed or Failed course attempt.
Disable storing xAPI/ TinCan statements	Check box	Disabling this will stop storing xAPI/ TinCan statements in the internal database tincan_* tables, which would also disable the Activity Log screen.

Search Category

Use the table below to configure the system configuration settings in the Search category.

Setting	Type	Description
Search results per category	Number (Min=1, Max=100)	Enter the initial number of search results to return from the universal search (on the primary navigation menu bar). If there are more results, users can click the More Results link to display them, page-by-page.
Custom search URL template (e.g. `http://example.com/search?q={searchTerms}`	Text box	Enter a custom search URL template, if required.
Enable inline result in Universal Search, Learning Module Search and People Search	Check box	Select this check box to enable inline search results to be suggested as users type in the universal search field (in the legacy user interface only). Results will also be suggested in the Catalog Search widget.
Include session information in Learning Module Search	Check box	Enables the learning module search will now search on session code, session title and session description.

Security Management Category

Use the table below to configure the system configuration settings in the Security Management category.

Setting	Type	Description
Security Scan Level of Input Parameters	Drop-down list	Select the level of security required for data saved to the LMS, sent via browser form fields: • Medium (Script+SQL) Scan for JavaScript and SQL injection, using keyword detection. • High (+Links) Scan for JavaScript, SQL Injection, and HTML location directives (for example, `<A HREF=`, `.location.`) • Extreme (+HTML) Scan for any HTML (for example, `<`, `>`, `%3c`) Scanning actions are based on OWASP best practice guidelines. Recommended setting: High.
Advanced: Allow Persistent Sessions (Session Hijacking)	Check box	Select this check box to allow persistent sessions. New login requests will be able to use a previous session cookie. This is known as session hijacking. Clear this check box to prevent new requests from reusing a previous session cookie. When this check box is cleared, a new login (or logoff) invalidates any existing login with the same user ID. PeopleFluent recommends disabling persistent sessions, although that may inconvenience some users by requiring a new login for some link and server restart scenarios. Recommended setting: disabled.
Advanced: Allow Concurrent Logins	Check box	Select this check box to allow multiple concurrent logins with the same user ID. Recommended setting: disabled.

Advanced: IFrame Protection (Clickjacking)	Single selection	To prevent external websites from putting an application from another domain within its own frameset, which could allow clickjacking attacks, select **Allow same origin only**. For external sites that include portals that embed valid application screens required for the LMS, select **None**. For more information about clickjacking, see the OWASP guidelines at owasp.org. Recommended setting: Allow same origin only.
Advanced: Disable Previous Sessions At Login	Check box	Select this check box to allow the current login request to take precedence over previous sessions immediately, without waiting for the previous session timer (which may be 1-4 hours) to expire. This option improves usability when both the *Allow Persistent Sessions* and *Allow Concurrent Logins* settings are disabled. Recommended setting: enabled.
Advanced: Enforce IP Session Binding	Check box	Select this check box to require the IP address used at login be the source for all subsequent *TX* requests. This can protect against session hijacking, although keep in mind that offices that use gateways may map all requests from the same office to the same IP address. This setting may need to be disabled for some scenarios where remote courses or portals are used from third-party servers. Recommended setting: enabled.
Maximum Failed Log-In Attempts	Number (Min=0, Max=20)	Enter the maximum number of failed login attempts before the user's account status is set to *Suspended*. This helps to prevent hacking attempts on known user IDs. Recommended setting: 5.
Suspension Interval (# minutes)	Number (Min=0, Max=120)	Enter the number of minutes to suspend the user account when the *Maximum Failed Login Attempts* has been exceeded. Enter `0` to suspend the account indefinitely or until it is reactivated by an administrator. Recommended setting: 15.
Minimum Password Length	Number (Min=1, Max=15)	Enter the minimum character length for user passwords. Recommended setting: 15.
Enable Multi-Factor Authentication	Check box	Turning this on will enable Enable Multi-Factor Authentication for all users. Recommended setting: Enabled

Multi-Factor Authentication re-authentication period (Days)	Number (Min=1, Max=90)	The number of days allowed before MFA is required to login again. Recommended setting: 30
"Multi-Factor Authentication code validity period (Minutes)	Number (Min=1, Max=60)	The number of minutes that the one time passcode is valid. The code will immediately become invalid if the current login attempt fails. Recommended setting: 5
Maximum number of Multi-Factor Authentication attempts	Number (Min=1, Max=15)	The maximum number of MFA attempts before the account is locked. Recommended setting: 5
Password Change Interval (# days)	Number (Min=0, Max=99999)	Enter the numbers of days since the last password change to prompt for a new password. The interval is checked each time users log in. Recommended setting: 0.
Maximum Days of Inactivity Allowed for Accounts	Number (Min=0, Max=365)	Enter the maximum number of days' inactivity before the user's account status is set to either *Closed* or *Suspended*, depending on whether the *Set Inactive Accounts to Suspended* setting is enabled or not. Recommended setting: 0.
Force First Log-In Password Change	Check box	Select this check box to force users to change their password the first time they log into the LMS. Recommended setting: enabled.
Require Strong Passwords	Check box	Select this check box to require users to choose a password that is difficult to guess. These include a mix of alphanumeric characters, a minimum of six characters, and cannot contain simple phrases, such as *abc123*, *qwerty* and *password*. Recommended setting: enabled.
Number of Previous Passwords That Cannot Be Reused	Number (Min=1, Max=99)	Enter the number of previous passwords—going backwards from the current password—that cannot be reused when setting a new password. This setting requires the *Require Strong Passwords* setting to be enabled. Recommended setting: 5.
Number of Digit(s) in a Strong Password	Number (Min=0, Max=2)	Enter the number of digits that must be present in a strong password. This setting requires the *Require Strong Passwords* setting to be enabled. Recommended setting: 1.

Number of Special Character(s) in a Strong Password	Number (Min=0, Max=2)	Enter the number of special characters that must be present in a strong password. Special characters are non-alphanumeric. This setting requires the *Require Strong Passwords* setting to be enabled. Recommended setting: 1.
Set Inactive Accounts to Suspended	Check box	Select this check box to set inactive user accounts to *Suspended* instead of *Closed*. Recommended setting: disabled.
Allow Catalog Level Permissions for Session Selector	Check box	Select this check box to use only catalog level read permissions to filter the learning object session selector in report queries. Clear the check box to use catalog, module and session level permissions. This setting is included for backwards compatibility and PeopleFluent recommends clearing it to use module and session level permissions. Recommended setting: disabled.
Enable CSRF validation for login requests.	Check box	Select this check box to enable cross-site request forgery (CSRF) protection on the native LMS login page. A token value is added to the login form and validated when the form is submitted. Recommended setting: enabled. Customers who use external login pages must leave this check box cleared for their login pages to function.
Repository Permissions Level	Single selection	Select **Files** to apply access permissions to files (in addition to folders) in the Repository Manager. Select **Folders** to apply access permissions at the folder level only. If the repository contains a lot of files, selecting *Folders* can greatly improve LMS performance. Recommended setting: Folders.
Minimal Authentication Response	Check box	Select this check box to return a single response code for login failures. Returning as little information as possible to potential hackers is a security best practice. Recommended setting: enabled.
Disallowed File Extensions	Text	Enter a comma-separated list of file extensions to specify the file types that cannot be imported into the LMS, to reduce security risks. For example, `.exe,.bat,.jsp`.

Allowed General User File Extensions	Text	Enter a comma-separated list of file extensions to specify the file types that do not require special role permissions to be uploaded to the LMS. This list is checked wherever a user can upload files (for example, skins, content packages and repository items). Leave this field blank to allow all file types to be uploaded. Example file types typically uploaded can include: • Images (.png, .jpg, .gif, .svg, .apng, .webp) • Audio (.mp3, .aac, .m4a, .au, .aif, .wav) • Video (.avi, .mov, .mpg, .mp4, .webm) • Documents (.pdf, .docx, .rtf, .xlsx, .odt, .doc, .xls) • Text file (.txt, .csv, .xml, .properties) • Presentations (.pptx, .pps, .ppt) • Packages (.zip, .xml, .xsd, .js)
Enforce No-Store Header Response	Check box	Select this check box to enforce the no-store cache control directive in HTTP responses, so that they are not stored in any cache. This does not prevent a valid pre-existing cached response being returned. Recommended setting: enabled.

Trusted apps	Text box	Enter a list of trusted apps, one per line. For example,
		
		`talentslate:///oauth`
		
		`http://www.lmsserver.com/folder/netdimensions-slate/sso`

Enforce Repository Access Control on Secure Servlet	Check box	Select this check box to enforce access permission rules when accessing repository files via a secure servlet. Recommended setting: enabled.
Enable spreadsheet formula injection protection	Check box	Select this check box to protect the LMS from spreadsheet formula injection attempts. When enabled, all fields in CSV or XLS outputs are prepended with a single quote if it begins with any of the these characters: • = • + • - • @ • *Tab* • *Carriage return* Recommended setting: enabled.

Enable cross-site scripting protection	Drop-down list	Select the level of protection from cross-site scripting (XSS). When enabled, this option controls the value of the *X-XSS-Protection* HTTP response header, and stops pages from loading when browsers detect reflected XSS attacks. • Disable Disable XSS filtering. • Enable and sanitize Enable XSS filtering. If a cross-site scripting attack is detected, the browser will sanitize the page (remove the unsafe parts). For more information, see HTML Sanitizer Reference. • Enable and block Enable XSS filtering. Instead of sanitizing the page, the browser will prevent it from loading if an attack is detected. Recommended setting: Enable and block.
Disable content sniffing	Check box	Select this check box to add an *X-Content-Type-Options: nosniff* header to HTTP responses. This indicates that the MIME types advertised in the *Content-Type* headers must be followed and should not be changed. This setting provides a way to opt out of MIME type sniffing, or, in other words, to say that the MIME types are deliberately configured. Recommended setting: enabled.

Enable Referrer Policy	Drop-down list	Select an option to determine how the value of the referrer header is set in links external to the current site. The default value is *Strict origin when cross origin*. • Omit Do not set a referrer policy for this site. • No referrer The browser will never send the referrer header with requests made from current site. • No referrer when downgrade The browser will not send the referrer header when navigating from HTTPS to HTTP. • Same origin The browser will only set the referrer header on requests to the same origin. • Origin The browser will always set the referrer header to the origin from which the request was made. This will strip any path information from the referrer information. • Strict origin This is similar to *Origin* but will not allow the secure origin to be sent on an HTTP request, only HTTPS. • Origin when cross origin The browser will send the full URL to requests to the same origin but only send the origin when requests are cross-origin. • Strict origin when cross origin Similar to *Origin when cross origin* but will not allow any information to be sent via a scheme downgrade (when navigating from HTTPS to HTTP). • Unsafe url The browser will always send the full URL with any request to any origin.

Enable Permission Policy	Drop-down list	This provides a mechanism to allow and deny the use of browser features, in this case, allowing the browser to make a PeopleFluent Learning window full screen. The default value is *All*. Select an option: • All All windows and iframes can enter full screen mode. • Self Windows and iframes can enter full screen mode only if they are from the same origin. • None Windows and iframes cannot enter full screen mode.
Content Security Policy	Text box	This option defines approved sources of content (such as JavaScript and CSS) that the browser may load. It can be an effective countermeasure to Cross Site Scripting (XSS) attacks. The Content Security Policy header value is made up of one or more directives. The default for this setting is *script-src 'self' 'unsafe-inline' 'unsafe-eval';*. Separate multiple directives with a semicolon.

Self-Registration Category

Use the table below to configure the system configuration settings in the Self-Registration category.

Setting	Type	Description
Enable self-registration	Check box	Select this check box to enable users to self-register LMS user accounts. To use the self-registration feature, link an HTML page to http://*servername*/ekp/servlet/ekp?TX=SELFREGISTRATION, which will present the user with the built-in forms needed to complete the registration process.
Enable user agreement	Check box	Select this check box to show the user agreement form at the end of the self-registration process, which the user can accept or decline. The user account will be created only when the user accepts the user agreement. To change the default user agreement text, edit the *text.user_agreement* label in the *custom.properties* custom language file.
Other Name Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Title Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
User E-mail field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.

User e-mail must be unique	Check box	Select this check box to ensure self-registered users provide a unique email address (if the *User E-mail* field is enabled). Enabling this option prevents users accidentally self-registering multiple times with the same email address.
Manager Name Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Manager E-mail Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Address Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Local Code Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Employee Number Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Job Title field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Department Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Cost Center Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Date of Employment Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.

Gender Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Date of Birth Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
User Attribute 1	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
User Attribute 2	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
User Attribute 3	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
User Attribute 4	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Company Name Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Address 2 field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
City Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Province/State Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Postal Code Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.

Country Code Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Phone Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Telefax Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Mobile Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
HR Manager Name Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
HR Manager E-mail Field	Single selection	Select an option to specify whether this field is mandatory, optional or disabled when users self-register.
Enable user edit organization	Check box	Select this check box to enable users to enter organization information in the self-registration form.
Self-Registered users need authorization before access	Check box	Select this check box to set new self-registered users accounts to *Suspended*. This lets administrators approve or deny registration requests before the users are allowed to log into the LMS.
The Highest Organization Level That Can Be Changed by a Self-Registration User	Drop-down list	Select the highest organization level self-registering users are allowed to assign themselves to. By limiting the highest level they can choose, you can restrict them to a specific branch of the organization tree.

The Profile User ID	Drop-down list	Select the user profile to assign new self-registered users. User profile templates, created in the User Editor (or uploaded via the User Data Loader), define a set of default properties that can be associated with a new user when the new record is created. By selecting a profile to be used as a part of the self-registration process, you can default specific profile information for new users.
The Admin User ID	Text box	If the Self-Registered users need authorization before access setting is enabled, click the **browse** icon to select the administrator to notify when users submit a request to self-register.
Use registration date as join date	Check box	Select this check box to set the Join Date to the date the user account was created through self-registration. The Join Date can be edited subsequently in the User Editor.
Set expiration date as N months after join date.	Number (Min=0, Max=12)	Enter the number of months from the Join Date to set the user account Expiration Date for users created through self-registration. Enter 0 or leave this field blank to leave the Expiration Date unset. The Expiration Date can be edited subsequently in the User Editor.
E-mail template for self-registration failure	Selector	Click the **browse** icon to select the email template used to send emails to the administrator (specified in The Admin User ID field) if any of the self-registration steps fail.

E-mail template for successful self-registration	Selector	Click the **browse** icon to select the email template used to send emails to the administrator (specified in The Admin User ID field) on successful self-registration.
Minimum organization levels required to select	Drop-down list	Select the minimum level in their organization self-registering users are required to select for themselves. If this setting is configured to require selection of an organization at a level that is higher than the actual levels in the organization tree, new users will be required to select an organization up to the child-most organization in the hierarchy. This setting works interactively with the highest organization level that can be changed by a new user. New users must be able to select an organization at each level, with respect to the selected level on this setting. If a certain level restricts new users from selecting the available organizations while this level is required to be selected, an error message is shown during self-registration.

System Category

Use the table below to configure the system configuration settings in the System category.

Setting	Type	Description
Report Query Timeout	Number (Min=0, Max=99999)	Enter the timeout in seconds for a single SQL statement in Report Wizard queries. This is not a transaction or task timeout as it applies only to a single statement.
Adobe Connect License Type	Single selection	Select the type of Adobe Connect license used by the LMS: • Learning (Virtual Classrooms) • Meetings (Meetings) The option selected here also determines what type of object will be created in Adobe Connect. Both licenses use the Virtual Classroom learning type in PeopleFluent LMS. You must maintain a valid license from Adobe in order to use this virtual classroom integration.
Enable lazy auto-enroll processing	Check box	Select this check box to allow auto-enroll processing at login time to use a separate thread. This is highly recommended, as it improves login response times. With this setting enabled, learners may see new courses appear in their list of Current Learning ModulesCurrent Courses up to 30 seconds after logging in, instead of immediately.

Enable New Batch Report Name Format	Check box	Select this check box to use the naming format *<PID>_<Report Title>_<Date>.<type>* for reports generated by the Report Wizard. Clear this check box to name reports with the LMS internal report ID. These names may be less meaningful to users.
Perform non-blocking query searching and reporting	Check box	Select this check box to enable reports run at a READ UNCOMMITTED isolation level to be run much faster and with reduced locking and contention. This can result in a lower point-in-time accuracy. PeopleFluent recommends enabling this setting. This setting applies only to Microsoft SQL Server.
Enable Exchange Server schedule integration	Check box	Select this check box to activate the integration with Exchange Server, to synchronize calendar events with PeopleFluent Learning.
Show Exchange Server events in Class Resource Manager calendars as "Busy" only	Check box	Select this check box to display third-party Exchange Server events as *Busy* blocks in PeopleFluent Learning calendars.
Check and Rebuild Out-of-Sync Search Index Hourly	Check box	Select this check box to allow an hourly task to auto detect and rebuild search index which is out-ofsync.
Export CSV using UTF-8 BOM encoding	Check box	Select this check box to allow CSV reports that include special characters to open correctly in Microsoft Excel. It applies to all reports output via CSV.

System Maintenance Category

Use the table below to configure the system configuration settings in the Wiki category.

Setting	Type	Description
Remove Finished Scheduled Reports (# of days to keep, 0 to keep all)	Numeric	This task reviews and removes entries and files related to scheduled reports with a FINISHED status. The task will remove data for reports that entered Finished status within a specified period. For example, if the task is configured to keep data for finished reports for 10 days, the task will remove the data for any reports that finished more than 10 days prior. Once enabled and configured, the Remove Finished Scheduled Reports task will run weekly.
Remove Orphaned Scheduled Reports	Check box	This task reviews current scheduled reports and take the following actions: • Delete all scheduled reports that were created by a user account that does not have a status of ACTIVE or SUSPENDED. • Remove users who are not ACTIVE or SUSPENDED from being delivery recipients of scheduled reports. • Mark scheduled reports as Finished if there are no delivery recipients with active user accounts. Once enabled, the Remove Orphaned Scheduled Reports task will run weekly.

Email Notification Clean Up Period	Numeric	This task removes email notifications within a specified period. For example, if the task is configured to keep email notifications for 180 days, the task will remove notifications that are more than 180 days old. Once enabled and configured, the Email Notification Clean Up Task will run weekly.
Batch Report Cleanup Period	Numeric	This daily task is available that reviews and removes batch report entries and files that are older than the specified clean up period. For example, if the task is configured to keep data for batch reports for 10 days, the task will remove the data for any batch report that ran more than 10 days prior.

User Category

Use the table below to configure the system configuration settings in the User category.

Setting	Type	Description
Available Options for the Current Status Dropdown.	Check boxes	Select the check boxes of the statuses to include in the drop-down list of statuses in the Change Status dialog on the Users page. User administrators can change the status of users from the action menu in the Users page to any one of the statuses selected here.
Allow e-mail-based user log-in	Check box	Select this check box to allow users to log in using their email address instead of their LMS user name. PeopleFluent recommends clearing this check box where email addresses for different users may not be unique.
Show User Attribute 1	Check box	Select this check box to show User Attribute 1 in the user's profile in the User Editor. Administrators with at least read-only access to the user attribute can assign values to it in the User Editor.
Show User Attribute 2	Check box	See *Show User Attribute 1*, above.
Show User Attribute 3	Check box	See *Show User Attribute 1*, above.
Show User Attribute 4	Check box	See *Show User Attribute 1*, above.
Show User Attribute 5	Check box	See *Show User Attribute 1*, above.
Show User Attribute 6	Check box	See *Show User Attribute 1*, above.
Show User Attribute 7	Check box	See *Show User Attribute 1*, above.
Show User Attribute 8	Check box	See *Show User Attribute 1*, above.

Use drop-down boxes to edit User Attribute 1	Check box	Select this check box to provide either a drop-down list or a selector window to choose a predefined value for this attribute (depending on the *Use Attribute Selector Instead of Drop-down* System Configuration setting). Clear the check box to enable administrators to enter any text or number value in the User Editor.
Use drop-down boxes to edit User Attribute 2	Check box	See *Use drop-down boxes to edit User Attribute 1*, above.
Use drop-down boxes to edit User Attribute 3	Check box	See *Use drop-down boxes to edit User Attribute 1*, above.
Use drop-down boxes to edit User Attribute 4	Check box	See *Use drop-down boxes to edit User Attribute 1*, above.
Use drop-down boxes to edit User Attribute 5	Check box	See *Use drop-down boxes to edit User Attribute 1*, above.
Use drop-down boxes to edit User Attribute 6	Check box	See *Use drop-down boxes to edit User Attribute 1*, above.
Use drop-down boxes to edit User Attribute 7	Check box	See *Use drop-down boxes to edit User Attribute 1*, above.
Use drop-down boxes to edit User Attribute 8	Check box	See *Use drop-down boxes to edit User Attribute 1*, above.
Show cost center attribute	Check box	Select this check box to show and enable administrators to enter a value in the Cost Center field in the User Editor.
Use the extended user Biography	Check box	Not used.
Number of Seconds Delay per E-mail When Forwarding to the SMTP Server	Number (Min=1, Max=100)	Enter the number of seconds delay between bulk emails being sent to the SMTP server. Entering a longer delay can help to avoid mail servers being swamped with too many requests at one time.

E-mail sent when user status changes to Active	Selector	Click the **browse** icon to select the email template used to send emails to users when their status is changed to *Active* due to: • The self-registration process • A manual change via User Editor • A User Data Loader upload
Closed Account Enrollment Cleanup Interval (# days)	Number (Min=0, Max=3650)	Enter the number of days after a user account is closed to remove the user's active enrollments from the LMS (those with a status of *Not Started*, *In Process*, *Waitlisted* and *Pending Approval*). Enter `0` to keep users' active enrollments in the LMS.
Provide Log-Off URL Parameters	Check box	Select this check box to add the following additional user-specific parameters to the default log-off URL: • User interface (UI) name • Language (LANG) ISO code • Full organization (ORG) name This information can be used when the log-off URL is a script that can redirect users to different log-off pages, based on the identifying URL parameter information.
Use Attribute Selector Instead of Drop-down	Check box	For user attributes that have *Use drop-down boxes to edit User Attribute* selected, select this check box to display a drop-down list of attribute values in the User Editor. Clear this check box to display an Edit link to open the attribute selector window.

Switching User Observes User Privileges	Check box	Select this check box to observe user privilege levels when switching user with the Switch User feature. When this option is selected, the switch user feature does not allow the current user to switch to a different user whose role has a higher privilege level.
User Group Membership Refresh Frequency	Drop-down list	Select the frequency to refresh user group membership: • Weekly • Daily • Hourly The LMS will automatically refresh the members of a user group membership based on its criteria. However, saving a user group (manually) also refreshes the list.
Trusted relying parties for delegated authentication (one per line)	Text box	To use a custom login page template for a specific relying party, append `:template` to the hostname or IP address, where `template` is the name of the template file in the *WEB-INF/conf/* directory on the server. For example, to use the template *myTemplate.wm* for the relying party at www.example.com, use `www.example.com:myTemplate.wm`.
Enable cloning/copying for Read Only permissions	Check box	Select this check box to allow users with Read Only permissions to a cloneable object, to be able to clone or copy that object. Only applicable to: Catalogs, Exams, Questions, Assessment Templates, Email Templates, and System Roles.

Allow User IDs to be changed	Check box	Select this check box to allow administrators to change User IDs in the User Editor or via the User Data Loader.
Allow additional roles	Check box	Select this check box to allow administrators to assign additional roles to users in the User Editor.
Automatic De-Assign of Job Profiles	Check box	Select this check box to automatically deassign the job profile for any user who no longer meets the auto-assign target criteria (defined in the Auto-Assign Targets), regardless of the user's status towards the learning and competencies assigned to the profile. The de-assign functionality will follow the settings in the Auto-Assign Console for criteria scan during login and offline-bulk scanning. This will not auto-withdraw courses or auto-remove competencies.
Allow Editing of External Authentication User Account	Check box	Select this check box to allow administrators to update the *Use External Authentication* field in the User Editor.
Automatically close user accounts without valid assignments	Check box	Select this check box to automatically close all user accounts that have expired job assignments (that is, where the Assignment End Date in their profile has passed). This option has no effect on users with no Assignment End Date.

Allow individual users on Supervises tab	Check box	Select this check box to allow administrators to assign specific users to others on the Supervises tab and via the User Data Loader. Special Notes If Individual Users are added and this setting is disabled, the users are still assigned and can be viewed by the Supervising user.

Webhooks Category

Use the table below to configure the system configuration settings in the Webhooks category.

Setting	Type	Description
Enrollment webhook URL	Text box	Enter the URL for external applications to receive notifications about course enrollments within the LMS. The notifications are delivered via a POST request to the specified URL, with parameters encoded as application/x-www-form-urlencoded. Enrollment notifications include the following parameters: • *learnerPermanentId*: the permanent (synthetic) ID of the learner who is being enrolled. • *learnerId*: the screen name of the learner who is being enrolled. • *moduleId*: the permanent ID of the module in which the learner is being enrolled. • *moduleDisplayId*: the display ID of the module in which the learner is being enrolled. • *sessionId*: the ID of the module session in which the learner is being enrolled. The notification is delivered asynchronously. Any delivery failure does not affect the enrollment.

Withdrawal webhook URL	Text box	Enter the URL for external applications to receive notifications about enrollment withdrawals within the LMS. The notifications are delivered via a POST request to the specified URL, with parameters encoded as application/x-www-form-urlencoded.
Session status change webhook URL	Text box	Enter the URL for external applications to receive notifications about enrollment status changes within the LMS. The notifications are delivered via a POST request to the specified URL, with parameters encoded as application/x-www-form-urlencoded.
Transcript status change webhook URL	Text box	Enter the URL for external applications to receive notifications about transcript status changes within the LMS. The notifications are delivered via a POST request to the specified URL, with parameters encoded as application/x-www-form-urlencoded.

Wiki Category

Use the table below to configure the system configuration settings in the Wiki category.

Setting	Type	Description
Enrolled User Permission in the Confluence Space of the Related Course	Check boxes	Select zero or more default permissions for learners in a confluence space when they enroll in a related course. • View: View all content in the space • Pages - Create: Create new pages and edit existing ones • Pages - Export: Export pages to PDF, Word • Pages - Restrict: Set page-level permissions • Pages - Remove: Remove pages • News - Create: Create news items and edit existing ones • News - Remove: Remove news • Comments - Create: Add comments to pages or news in the space • Comments - Remove: Remove the user's own comments • Attachments - Create: Add attachments to pages and news • Attachments - Remove: Remove attachments • Mail - Remove: Remove mail • Space - Export: Export space to HTML or XML

Email Parameters

Administrators can add dynamic content to email messages (including the subject) using parameters enclosed in curly braces: {*parameter_name*}. To insert a parameter into an email message, you select it from the Parameters drop-down list and click **Append to Message**. To insert a parameter into the subject of an email, you have to insert it in the message first, and then cut and paste it into the Subject field.

There are over 160 parameters you can use to include information about user accounts and enrollments.

Example: the Default Enrollment Confirmation Email

This is the System Default email template that can be automatically sent to participants who have successfully been enrolled in a course.

```
Dear {participant_name}, This is to confirm your enrollment in {course_title}. If you
have any queries, please contact our learning systems administrator
({default_system_approver}). Thank you for your attention.
```

The {default_system_approver} parameter inserts the name of the Default System Approver specified for the Logical Domain. (The Logical Domain specifies users and settings to use whenever an explicit parameter has not been provided.) Using {default_system_approver} ensures that a learning systems administrator user is included in the email.

News Article Field Reference

Use the table below to help you correctly format the news article data.

Field	Description
Expiration Date	This field works in combination with the Display Status. When you set the Display Status to *Automatically Show Until Expiration*, you can specify the date after which the news is no longer displayed to users. New news articles expire after one month by default. Click the **delete** icon and then click the **calendar** icon to select a different expiry date for the news article.
Display Status	Select whether the news article is automatically displayed until the Expiration Date, or not displayed at all.
Display Format	Select how to display the news article initially: • Headline title and teaser (default) • Headline title only • Headline title and content • Content only Whichever format is used, users can click the Read More link to view the entire news article contents.
News Category	Select the news category from the drop-down list. You can define news categories in the News Category Configuration page.
Display Order	Enter a number between 1 and 100 for the display order. News articles with a higher display order number are shown higher up the list of items. The number of items shown on the home page and in the News widget is determined by the *Number of News Articles to Display* System Configuration setting.
Language	You can assign multiple languages or a specific language to an article. When a user with a preferred language opens the News panel on the home page, any articles that have a language bundle matching their preferred language are shown in that language. If a news article doesn't have a language bundle matching the user's preferred language, the LMS can select a more generic version of the language; for example, *pt* (Portuguese) instead of *pt-BR* (Brazilian Portuguese). If a more generic version of a language variant is also not available, the news article is shown in the primary language defined for the user's Logical Domain.
Auto Delete Date	This field works in combination with the Automatically Delete property. When you set Automatically Delete property *Automatically Delete*, you can specify the date on which the news article is deleted. Click the **calendar** icon to select the date on which the news article is deleted.

Automatically Delete	Select from the drop-down list whether the news article will be automatically deleted on the Auto Delete Date, or not. If you select *Automatically Delete*, it will only be deleted if you also select the Auto Delete Date.
Title (Required)	You must enter a title for the news article.
Picture URL	Click **Select** to select an image from the Repository, or enter the URL directly.
File Attachment URL	Click **Select** to select a file from the Repository, or enter the URL directly (for example, `/ekp/nd/fresco/repository/documents/<filename>`). An icon will be added to the article display, which users can click to download the file.
Survey/Feedback	Click **Select** to select a survey exam. Survey's can have one or more questions.
Poll	Polls are survey exams with only a single question. To create a poll, select the **Poll** check box and click **Select** to select the survey exam containing the poll question.
Survey Delivery Language	Select **Auto-Select** to let the LMS select the survey's delivery language using the following methods in order of precedence: 1. Use the same language as the module the exam is assigned to, if it is available. 2. Use the language specified in the User Preferences tab in the user's profile. 3. Use the primary language of the exam. Select **Selection on Launch** to let the user select the delivery language (of those available) when the survey exam is launched. Alternatively, select a specific language from the drop-down list.
Teaser	Enter the teaser text, which appears under the title. Teasers can be a maximum of 255 characters.
Text	Enter the news item text. To use HTML markup in news articles, the *Enable WYSIWYG Editor* System Configuration setting must be enabled.

Certificate Date and Time Patterns

The table below describes the valid date and time patterns system administrators can enter in the *Preferred Date Format in Awarded Certificates CSV Loader* System Configuration setting.

Letter	Date or Time Component	Presentation	Examples
G	Era designation	Text	AD
y	Year	Year	2016; 16
M	Month in year	Month	July; Jul; 07
w	Week in year	Number	27
W	Week in month	Number	2
D	Day in year	Number	189
d	Day in month	Number	10
F	Day of week in month	Number	2
E	Day in week	Text	Tuesday; Tue
a	Am/pm marker	Text	PM
H	Hour in day (0-23)	Number	0
k	Hour in day (1-24)	Number	24
K	Hour in am/pm (0-11)	Number	0
h	Hour in am/pm (1-12)	Number	12
m	Minute in hour	Number	30
s	Second in minute	Number	55
S	Millisecond	Number	978
z	Time zone	General time zone	Pacific Standard Time; PST; GMT-08:00

Z	Time zone	RFC 822 time zone	-0800

The following examples show how date and time patterns are interpreted in the U.S. locale. The given date and time are 2021-07-04 12:08:56 local time in the U.S. Pacific Time time zone.

Table: Examples

Date and Time Pattern	Result
yyyy.MM.dd G 'at' HH:mm:ss z	2021.07.04 AD at 12:08:56 PDT
EEE, MMM d, ''yy	Wed, Jul 4, '21
h:mm a	12:08 PM
hh 'o''clock' a, zzzz	12 o'clock PM, Pacific Daylight Time
K:mm a, z	0:08 PM, PDT
yyyyy.MMMMM.dd GGG hh:mm aaa	02021.July.04 AD 12:08 PM
EEE, d MMM yyyy HH:mm:ss Z	Wed, 4 Jul 2021 12:08:56 -0700
yyMMddHHmmssZ	210704120856-0700
yyyy-MM-dd'T'HH:mm:ss.SSSZ	2021-07-04T12:08:56.235-0700

Specify a Different Login Identifier

System administrators can specify a field other than user ID as the identifier used at login, both for local login and SAML single sign-on. To change the login identifier, set the *authentication.keyField* property in the /WEB-INF/conf/ekp.properties file to one of the fields in the table below.

When users log in to the LMS, instead of entering their LMS user ID and password, they are prompted to enter the field defined in the *authentication.keyField* property.

> With the exception of user ID, it is not guaranteed that these fields will have unique values. Logging in using any of these fields will fail unless there is exactly one user account with the appropriate field value.

Table: Allowed Login Identifiers

Field	authentication.keyField Value
User ID (default)	UserID
Email address	Email
User attribute 1	UserAttr1
User attribute 2	UserAttr2
User attribute 3	UserAttr3
User attribute 4	UserAttr4
User attribute 5	UserAttr5
User attribute 6	UserAttr6
User attribute 7	UserAttr7
User attribute 8	UserAttr8
User attribute extension	UA-{label} (for example if the attribute extension label is MyAttributeExtension then use UA-MyAttributeExtension)

Impact on SAML Single Sign-on

The identity provider will need to provide a value for the field used as the login identifier.

Do not enable updates for a field that is being used as the identifier. For example, the following configuration would be invalid:

```
# Invalid configuration
authentication.keyField=Email
authentication.attribute.Email.allowUpdate=true
```

Impact on Local Login

The supplied login name is first checked against the user ID as normal. If there is no active account with the corresponding user ID, and a different field is specified for authentication.keyField, the LMS looks for a user account with the corresponding value for the specified field, and will use it only if there is exactly one account with the matching value.

Security Scan URLs CSVs Reference

The following words or characters are replaced by *UNSAFE_DATA* according to the *Security Scan Level of Input Parameters* setting in System Configuration > Security Management. The LMS scans Input from URL parameters and CSV data loaders.

Filenames are treated as follows:

- Do not allow illegal characters in the name (% or <) or illegal file extensions (defined in System Configuration).
- If the user's system role has the *OWASP Restrictions Override* permission (System Roles > Data Access Control > Role General Permissions), all are allowed except for illegal file extensions.
- If no special permissions, only allow explicitly listed extensions (defined in System Configuration).

Medium	High	Extreme
<script	var	<
alert(	href	>
vbscript	src=	%3c
eval	style=	
confirm(	action=	
:expression(		
.write		
prompt(		
onerror		
onmouse		
onload		
onunload		
onchange		
onsubmit		

onclick		
onbegin		
jsessionid		
.location		
document.		
window.		
parent.		
form.		
opener.		
insert into		
select from		
delete from		
update=		

JNDI-based LDAP Password Authentication

To secure the LDAP connections using SSL (sometimes referred to as LDAPS), administrators can configure arbitrary environment properties in /WEB-INF/conf/ekp.properties when using JNDI-based LDAP password authentication. To configure a default for all directory services, prefix the property name with `ldap.jndi.` To configure for a specific directory service (for example *ldap.jndi1.* for directory service 1), prefix the property name with `ldap.jndi{index}.`

You can secure the LDAP connections using SSL by:

- Specifying a security protocol
- Specifying an LDAPS provider URL

Specifying a security protocol

You can explicitly specify that SSL be used as the security protocol. The relevant JNDI property name is *java.naming.security.protocol*. Therefore, to specify this as the default for all directory services, set the following property in ekp.properties:

```
ldap.jndi.java.naming.security.protocol=ssl
```

To specify that SSL be used for directory service 1, set the following property in ekp.properties:

```
ldap.jndi1.java.naming.security.protocol=ssl
```

Specifying an LDAPS provider URL

You can specify a provider URL using the LDAPS scheme. The relevant JNDI property name for the provider URL is *java.naming.provider.url*. Therefore, to configure an LDAPS URL for directory service 1, for localhost on port 636, for example, you would use the following property. Use the backslash to escape the colon characters as per the conventions for .properties files. The raw value is ldaps://localhost:636.

```
ldap.jndi1.java.naming.provider.url=ldaps\://localhost\:636
```

If you explicitly specify the provider URL, there is no need to separately specify the host and port for the directory service.

Requiring JNDI for LDAP Password Authentication

The *ldap.useJndi* property is an alias for the *ldap.useActiveDirectory* property. PeopleFluent recommends enabling this regardless of whether the directory service uses Active Directory.

HTML Sanitizer Reference

The following table lists the HTML elements and their corresponding attributes that are permitted by the HTML sanitizer in PeopleFluent Learning.

Element	Permitted Attributes
a	href, name, rel, target
b	
big	
blockquote	
br	
code	
del	
div	
em	
font	
h1	
h2	
h3	
h4	
h5	
h6	
i	
iframe	
img	alt, height, src, title, width
ins	
li	

o	
ol	
p	style, class, width, height
s	
small	
source	src, type
span	style
strike	
strong	
sub	
sup	
table	align, border, cellpadding, cellspacing, class, height, id, name, style, title, valign, width
td	align, class, colspan, height, id, name, nowrap, rowspan, style, title, valign, width
th	align, class, colspan, height, id, name, nowrap, rowspan, style, title, valign, width
tr	class, id, name, style, title, valign
tt	
u	
ul	
video	class, width, height

Associate User Profiles with Trusted Sites

User profiles specify default properties for user accounts, such as organizations, skins and attributes. You can associate a specific user profile with each trusted site that you have configured in System Configuration. If the *Automatically create user accounts and enrollments for proxied course launches* System Configuration setting is enabled, user accounts can be created by proxied launch requests from trusted sites, and inherit the user profile associated with them.

For more information about generating a proxied launch package for a course, see the Course Administration Guide.

To associate a user profile with a trusted site

1. Go to **Manage Center > System > System Configuration**. The System Configuration page opens.
2. Select **General** from the Category drop-down list.
3. In the *Trusted Sites for Proxied Course Launches (one per line)* setting append `|profile=` followed by the profile ID to the URL of the trusted site. For example, `https://www.exampletrustedsite.com|profile=my-profile`.
4. Click **Save**.

Associate User ID Templates with Trusted Sites

For courses launched from another AICC-conformant learning management system, you can map the Student_ID value passed by the site that initiated the proxied launch request directly to an LMS user ID. This is typically not a problem if all proxied launch requests originate from the same site. However, if multiple sites can initiate proxied launch requests then this can lead to conflicts where identical Student_IDs are used by different sites.

To address this issue, you can associate a user ID template with each trusted site. A user ID template is a sequence of characters that includes the placeholder {Student_ID}. This placeholder will be dynamically substituted by the Student_ID value provided by the site that initiated the proxied launch request.

> PeopleFluent recommends using templates that follow the syntax of email addresses. For example, if the template *{Student_ID}@example.com* is associated with the site *www.example.com*, and that site initiates a proxied launch request with a Student_ID of *bob*, then that request will be associated with an LMS user account with ID *bob@example.com*.

For more information about generating a proxied launch package for a course, see the Course Administration Guide.

To associate a user ID template with a trusted site

1. Go to **Manage Center > System > System Configuration**. The System Configuration page opens.
2. Select **General** from the Category drop-down list.
3. In the *Trusted Sites for Proxied Course Launches (one per line)* setting append `|template=` followed by the profile ID to the URL of the trusted site. For example, `https://www.exampletrustedsite.com|temlpate={Student_ID}@exampletrustedsite.com`.
4. Click **Save**.

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

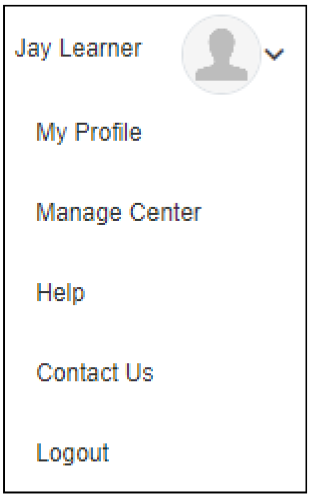
You can configure the options for drop-down list attributes.

Table: Attribute option fields

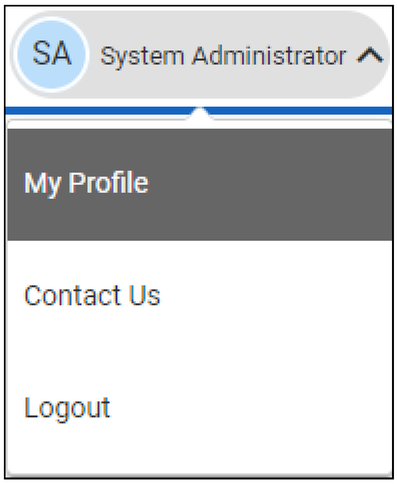
Field	Description
Code	Enter a unique identifier for the attribute's drop-down option value.
Label Key	Enter the label for the drop-down option value. This is the value shown in the drop-down where it appears in the LMS. For multi-language systems you can enter the label key that will be used to look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

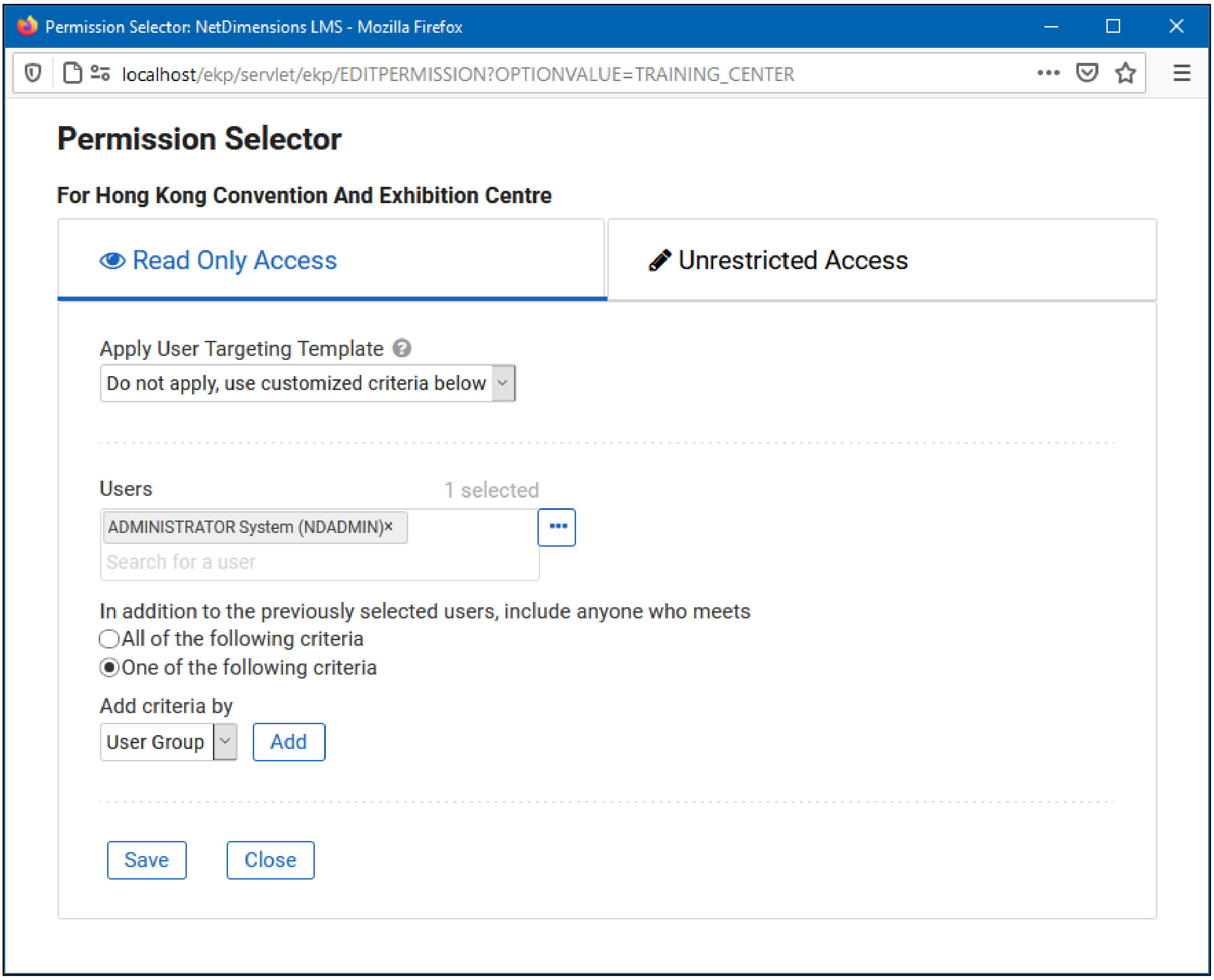


Figure: Permission Selector for Read Only Access to a Training Center

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.

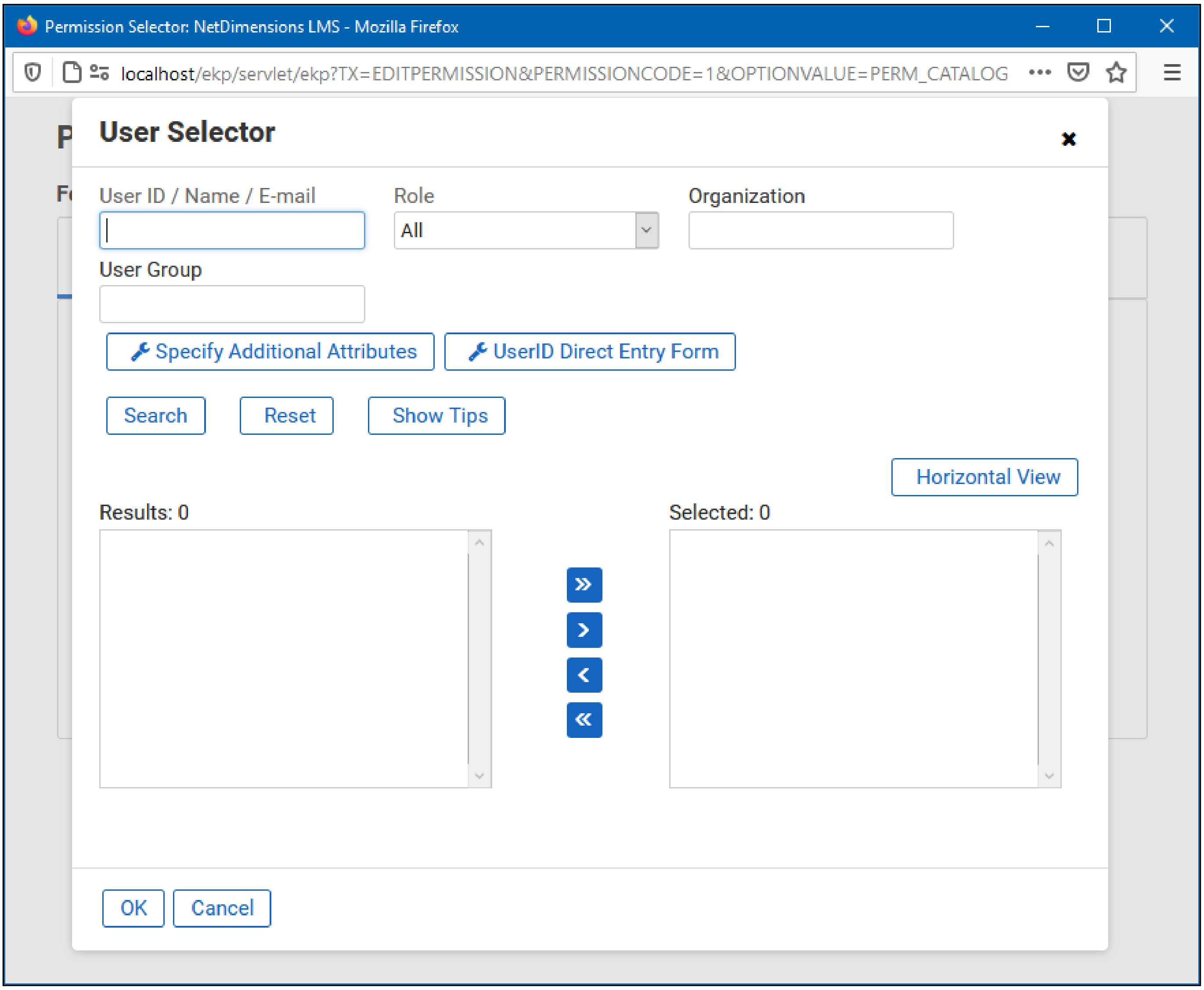


Figure: User Selector Accessed from the Permission Selector

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