PeopleFluent Learning

Course Administration

An overview of Course Administration in PeopleFluent Learning 22.07

Contents

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About Course Administration

Course administration deals with registering and configuring training courses in PeopleFluent Learning to enable course enrollment and participant tracking. Courses are defined in the LMS as *learning modules* of various types. Learning modules define the general course properties. Sessions define an instance of a learning module. They are used to capture course information unique to a particular training session or that changes over time.

Course administration involves tasks relating to:

- Creating and editing learning modules, programs and sessions

- Importing SCORM-based courses

- Configuring course enrollment policies

- Uploading course files and other reference material

- Scheduling training facility, instructor and resource bookings

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About Learning Modules

About Learning Programs

About Learning Module Sessions

About Importing Courses

About Enrollment Policies

About the Repository Manager

About the Resource Planner

About Learning Modules

The LMS uses learning modules to define the courses available to learners. Every course is defined by its module and session properties, and you must configure learning modules before you can assign them to course catalogs and learners.

To create and configure learning modules, your user role must have the required access control to the LMS features associated with course administration, such as the Catalog Editor. (For more information, see About System Roles.)

You can administer learning modules in the Manage Center, using the Catalog Editor, or by importing comma-separated values (CSV) formatted files, which you import via the Course and Program CSV Loaders. You can download a template CSV file to help you configure learning modules outside of the LMS.

You can organize learning modules in course catalogs to make them visible to learners, subject to any module- and catalog-specific permissions. Learning modules can also be assigned to learners automatically, according to their enrollment policy.

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About Importing Courses

About the Course CSV Loader

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About Learning Types

The LMS supports all learning types including online courses (internal or external), virtual classes (live and archived), instructor led classroom sessions, workshops, on-the-job training and assessments, and blended learning programs that combine any of these types along with exams or quizzes as needed.

Each type of learning module has its own configuration requirements and properties. For this reason you cannot change a learning module's learning type once you have created the module.

Table: Types of learning module you can create in the LMS, subject to licensing.

Learning Type	Description
Classroom	Schedule-based classroom training that can have multiple sessions and locations.
Exam	This learning type requires the learner to do something that is assessed. Assessments are built with the LMS Exam functionality.
Just-in-Time Learning	This is usually quick-to-learn material available via a link to an external provider. This type of course can usually be launched at any time and any number of times.
Online	Online learning, accessed via the web or intranet, typically in SCORM, AICC, or xAPI format, but can also be links to other types of resources.
On-the-Job Training	The On-the-Job Training (OJT) learning type is designed to allow direct appraisers or supervisors to assess the performance of learners after they have completed some on-the- job training.
Program	A collection of related learning modules, which can be different types. Constituent modules may be mandatory or optional. Learners enroll in the program itself, not in each module.
Task	Tasks are lightweight courses and can be used to track snippets of training, or to track the accomplishment of specific piece of work.
Virtual Classroom	This type of course provides a link to a scheduled virtual classroom training session, typically a webinar or video conference where learners can interact with the instructor.
Virtual Classroom (archived)	This provides a link to a recorded virtual classroom session that may be accessed for direct playback.

Other learning types supported by the LMS are:

- Certification

- Workshop

- Coaching

- External

- Book

- CD

- Video

- Audio

These learning types can be enabled and disabled in the *Catalog* System Configuration settings.

Book, CD, Video and Audio represent physical media with a specific location. For digital media, a different type can be used.

Additional Information

About Learning Modules

About Classroom Learning Types

About the Task Learning Type

About On-the-Job Training

About Learning Programs

About Module Properties

About Classroom Learning Types

Classroom based training courses generally require more configuration in the LMS as they occur in physical training centers, may use specific resources, provide reference materials to participants, and they need instructors.

Classroom learning modules must have at least one session, where each session represents one complete instance of the course, which may take place over multiple days. Classroom sessions allow a specific number of participants, which can be a fixed number or determined by the number of seats in the training room.

You can allow learners to transfer from one session to another, and specify how waitlisted learners are handled when the number of enrollment requests outnumber the seating capacity.

Course administrators must configure the following information as a minimum for classroom learning types:

- Catalog setup, including visibility and access permissions
- Enrollment policy
- Enrollment limits
- Waitlist handling
- Class schedule
- Instructor
- Training center and training facility, or venue (for locations not defined as a training center and facility).

Additional Information

Create a Learning Module

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About Learning Module Sessions

Configure a Class Schedule

Reserve a Classroom Resource

About Instructors

About Training Centers

About Facilities

About Learning Programs

Course administrators can create learning programs to group together related learning modules into a learning curriculum. You can group enrollable and non-enrollable learning types, such as online courses, classes and exams, into a learning program. Constituent learning modules can be mandatory or optional, and carry different weightings towards the program's overall passing score.

You can configure programs to be self-enrollable, and administrators can enroll learners in a program, either individually or via group enroll.

Like enrollable learning modules, programs consist of one or more sessions. You assign learning modules to each program session, and learners enrolled in a program are enrolled in all of its sessions. You can configure the order in which program sessions must be completed, or allow them to be completed in any order.

Where a program's modules are set to be taken in a specific order, you can configure the pacing and sequence with these program settings:

- Allow or disallow learners to advance to the next module on failing the preceding one

- Hide or show modules blocked by preceding modules

- Configure auto-enrollment and due dates per module

- Allow or disallow learners to re-enroll in a failed or expired module

- Enable access to the Progress Tracker for the program

Automatic Program Completion

By enabling the *Enable Automatic Completion of Learning Programs* System Configuration setting the status for a program can be updated to *Completed* automatically when the learner has fulfilled the learning requirements. Alternatively, by disabling this setting, instructors or course administrators are responsible for updating the program's status to *Completed* for learners manually.

Share/Credit Enrollment

Where a component module or program (or its equivalent) has been completed by the learner prior to enrolling in the program, you can specify whether or not the learner is expected to retake the learning using the *Share/credit enrollment* option in the Define Enrollment Policy page in the Catalog Editor. The default value is specified by the *Default Share/credit enrollment for programs* System Configuration setting.

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.

Composite Programs

Programs consist of other learning modules, which may themselves be a program. Programs that contain other programs are referred to in the LMS as composite programs.

Deleting Programs

Deleting a program deletes the following:

- The program learning module

- The relationships between the program and its assigned modules

- The relationships between the program and its parent composite program(s), if it is assigned to one

- All the transcripts for the program

Modules assigned to a program are not deleted when you delete the program.

Additional Information

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About Learning Modules

About Composite Programs

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About Session Properties

Program Session Enrollment Update

About the Progress Tracker

About the Progress Tracker

The Progress Tracker, aimed primarily at learners, provides a calendar view of their current progress through the programs and sub-modules they are enrolled in.

It can be opened from the following areas:

- Current Learning Modules
- Knowledge Center
- Training Progress Widget
- Compliance Analytics
- Review Career Development Center

The Progress Tracker can list all top-level programs or modules within the program, and gives a visual display of their deadline status when modules are due. The calendar, by default, shows one calendar year of information with the current month centered. Information such as the module's enrollment date, completion date, program due date and module's due date are also displayed.

You can filter the Progress Tracker to show all of the program's sub-modules or only incomplete sub-modules. You can also choose whether to include optional sub-modules.

You can sort the program's sub-modules by deadline or module status.

Email

You can create emails from the Progress Tracker. Inside the email creation dialog the learner can attach the snapshot of the current view from the Progress Tracker. This creates an image file and attaches it to the email.

Notification

To enable higher visibility of deadlines for modules and their programs, learners can access more information via the *Deadline Details* link. The link is available from the following pages:

- Personal Calendar
- Learning Path
- Knowledge Center
- Current Learning Modules

Additional Information

About Learning Programs

About Composite Programs

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

The following restrictions apply when assigning programs to another program:

- Only programs with an active session can be assigned. Programs that do not have at least one session with an *Active* status are not available when assigning learning modules to a program.

- Programs containing the current program cannot be selected (cyclical dependency is not allowed).

- A program cannot be assigned to itself.

Enrollment Approval for Composite Programs

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

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

Enrollment into a composite program can fail if:

- The composite program includes one or more programs in which the learner is already enrolled in a different session.

- The composite program has been configured in such a way that the LMS is unable to calculate a cost.

Waitlist Handling in Composite Programs

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

Share/credit Enrollment in Composite Programs

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

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

Table: Settings for a program and composite program

Program	Sub-module or program	Share/credit Enrollment Setting
Program 1	Module 1, Module 2	Requires the learner to retake the learning.

Program 2	Program 1, Module 3	Does not require the learner to retake the learning.

For example:

1. Learner enrolls in Program 1 and completes Modules 1 and 2 to complete Program 1.

2. Learner then enrolls in Program 2, which does not require the learner to retake any completed courses, therefore they only need to complete Module 3 to complete Program 2.

3. Learner re-enrolls in Program 1, which requires the learner to retake completed courses, so even though they have completed Module 1 and 2 before, they must complete them again.

Additional Information

About Learning Programs

Create a Learning Program

About Session Properties

About the Task Learning Type

Tasks are lightweight courses and can be used to track snippets of training, or to track the accomplishment of specific piece of work. For example, training for machine operation might consist of the following tasks:

- Read the machine operation manual

- Observe demonstration given by a certified trainer

- Duty manager confirmation for skills acquired

Task learning types have:

- A mandatory learning module description

- A sign-off section to define the approvers who may confirm the completion of a user's task

- A task completion reminder that allows a user to remind the approvers to take action on the enrolled task

Task learning types do not have cost settings.

When learners have completed a task but they cannot sign it off themselves, they can send a *Task Complete Reminder* email to the person who is responsible for signing it off. To enable the email to be sent, you must select the email template for the *Task Complete Reminder* in the task session's Email Preferences Setup.

Learners can send Task Complete Reminder emails in the Current Courses page.

Approvers can sign off tasks in the Task Approval page (**Workspace > Task Approval**).

Additional Information

Task Sign-off Options

Configure Email Preferences for a Session

About On-the-Job Training

The On-the-Job Training (OTJ) learning type is designed to allow supervisors to assess the participant's performance after the learner has completed it. In order for a participant to complete an OTJ training course, you assign one or more supervisors and a supervisor assessment exam type to an OTJ learning module or session. The participant cannot complete an OTJ course themselves, instead the supervisor completes the assessment exam to complete the course.

You can assign one or more users to complete the supervisor assessment in several pages in the Catalog Editor:

- You can assign the supervisors at the learning module level for all participants in the Assign Supervisor Assessment page.

- You can assign the supervisors individually for each participant in the Participants page for the OTJ session.

- You can assign the supervisors for selected participants during Group Enroll in the Group Enroll page.

Additional Information

Assign Supervisor Assessment

View or Update Session Participants

Group Enroll Learners in a Session

Search for Learning Modules

To find one or more learning modules you want to work on, you can filter the list on the Learning Modules page. You can quickly filter the list on the learning module title, ID or description, or use more complex search criteria comprising multiple module properties and—optionally—module attributes.

When you have filtered the list of modules, you can save the filter as a preset filter to use in future without having to re-enter the criteria.

To filter the list of learning modules

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

2. Enter the title, ID or some key words from the module description and click **Filter**.

3. To filter on other module properties and attributes, or to use a preset filter, click **Show Advanced Filters**. The filter box expands to show additional criteria fields.

4. Select and/or enter the filter criteria as required and click **Filter**.

To save the filter for future use

1. If the advanced filters are not shown, click **Show Advanced Filters**.

2. Select and/or enter the filter criteria as required.

3. Click **Save as Preset**. The Save as Preset dialog appears.

4. Enter a name for the preset filter.

5. Select the **Set as default** check box to automatically filter the list of learning modules using the preset filter when you go to the Learning Modules page.

Additional Information

Search Guidelines for Learning Modules

Search Guidelines for Learning Modules

To return a more specific set of search results when you filter the list of learning modules, you can modify the form of your search term for text fields, as shown in this table.

Table: Search tips

Example Search Term	Description
online Training	Any modules matching **online** or **training** (case insensitive).
"Online Training"	Any modules matching **Online Training** exactly, in a single field (case insensitive).
Online -Training	Any modules matching **Online** but not **Training**.
Online +Training	Any modules matching **Training**, modules that also match **Online** will rank higher in the results.
(Online OR Training) AND course	Any modules matching **course** and either **Online** or **Training** (use parentheses to group the OR criteria).
"Online Training"~2	Any modules matching **Online Training** within two words, in a single field.
com*r	Any modules with properties starting with **com** and ending with **r**, where the asterisk (*) is a wildcard that represents any number of characters, for example, **comr**, **computer**. If you enter **classroom** as the search term and there are catalog entries containing the text **classroom**, **classroom1** and **classroom2**, only the entry containing the text **classroom** will be returned. If you would like the results to include all three learning modules, enter **classroom*** as the search term.
te?t	Any modules with properties starting with **te** and ending with **t**, where the question mark (?) is a wildcard for a single character (for example, test, text or tent).

description:http\:\/\/ xyz.com	Any modules where the **description** field contains **http://xyz.com**. Enter a backslash (****) as the escape character before any reserved characters like **:** or **/**.
	
	Examples of other field-specific search terms:
	
	   • title:java
	
	   • objective:introduction
	
	   • id:MOD001
	
	   • referenceno:REF123
	
	   • vendorDesc:*Solution
	
	   • audience:(begin* OR mid*)
	
	   • price:USD*

Additional Information

About Learning Modules

Create a Learning Module

Course administrators can create learning modules individually in the LMS application or import one or more modules via the Course CSV Loader.

To create a learning module

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

2. Click **Create Learning Module**. The Catalog Editor opens in a new window.

3. Enter a unique ID for the module or click **Generate Unique ID** to generate an ID that conforms to the format defined in the *Course ID Generator Format* System Configuration setting. 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.

4. Select the Learning Type from the drop-down list.

5. Click **Create**. The new module opens in the Catalog Editor, where you can configure its module and session properties.

Additional Information

About Learning Types

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About the Course CSV Loader

About the Program CSV Loader

Create a Learning Program

When you, a course administrator, create a learning program you must create a learning module with a *Program* learning type, and create one or more sessions. For each session you assign the learning modules that constitute the program.

To create a program

1. Click **Create Learning Module**. The Catalog Editor opens in a new window.

2. Enter a unique ID for the module or click **Generate Unique ID** to generate an ID that conforms to the format defined in the *Course ID Generator Format* System Configuration setting. Using this setting enables you to create learning modules with a standard format with a static prefix. For example, MOD-0000, where 0000 is the next available unique four-digit number.

3. Select **Program** from the Learning Type drop-down list.

4. Click **Create**. The new program module opens in the Catalog Editor, where you can configure its module properties.

5. After completing the program's module properties, Click **Session Properties** to create a session.

6. In the Session Properties tab, click **Create/reorder sessions** to create a new session. The Learning Program Session Module Assignment page opens in the Catalog Editor.

7. Enter the ID for the new session or keep the automatically generated ID, which is defined in the *Session Code Generator Format* setting in System Configuration, and click **Create new session**. The new session is assigned to the program.

8. To edit the session properties, and assign learning modules to the program session, select the session in the Session Properties tab and click **Go**. The session properties pages are listed in the tab.

9. Complete the session properties. After completing each session property page, click the **Save** icon on the toolbar to save your changes.

Additional Information

About Module Properties

About Session Properties

About Learning Programs

About Composite Programs

Edit a Learning Module

Course administrators can edit learning modules individually in the Catalog Editor or the Course CSV Loader, or in bulk (many at once) via the Course CSV Loader. You must have unrestricted access permissions to a module to be able to edit it.

To edit a learning module in the Catalog Editor

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

2. If required, filter the list of learning modules to locate the one you want to edit. You can also sort the module list by any of the columns.

3. Click the Module Title of the module you want to edit, or select **View** from its action menu. The module opens in the Catalog Editor.

4. Update the module properties as required.

5. Click the **Save** icon to save your changes. Alternatively, to undo all of your changes and reset the module properties to their values before you started editing, click the **Reset** icon on the toolbar.

6. To close the Catalog Editor window, click the **Close** icon on the toolbar.

Additional Information

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About Learning Modules

Permissions

Clone a Learning Module

Course administrators can clone a learning module in the LMS application and update its module and session properties as required. Alternatively, you can use the Course CSV Loader to create a new module based on an existing record in the CSV file. When you clone a learning module in the LMS, you can choose to clone all revisions or just the latest revision.

> ⚠ Caution: not all module or session properties are cloned.
>
> The following module properties are not cloned:
>
> - Checklist items
>
> - Enrollment restriction settings
>
> The following session properties are not cloned:
>
> - Due date of Homework
>
> - Session Attribute values
>
> - Auto-enroll rules
>
> - Auto-enroll equivalency rules (if enabled)

To clone a learning module

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

2. Select **Clone** from the action menu of the learning module you want to clone. The Catalog Editor opens in a new window.

3. Enter a new unique ID for the module or leave it as the default value, which appends _n to the original module ID, where *n* increases by one each time the module is cloned.

4. Select whether to clone all revisions or only the latest.

5. Click **Clone**. The new module opens in the Catalog Editor, where you can configure its module and session properties.

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Define Module Properties

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About Learning Modules

About the Course CSV Loader

About the Program CSV Loader

Delete a Learning Module

Course administrators can delete individual learning modules or select multiple modules and delete them in bulk. You can delete learning modules in the Manage Center or via the Course CSV Data Loader.

When you delete a learning module, it is removed from the course catalog and no longer appears in catalog search results. It is, however, still accessible to participants who are currently enrolled in it. Deleting a learning module does not affect the training records of learners who have completed the course.

If you think you may want to reinstate the course or derive a new course from it, you can archive the learning module instead of deleting it. When you archive a module it is removed from the catalog but remains in the list of learning modules and you can un-archive it for use at a later time.

To delete a learning module

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

2. Select **Delete** from the action menu of the learning module you want to delete. You are asked to confirm the action.

Additional Information

Archive a Module

About Learning Modules

About Module Properties

Module properties define learning modules, the LMS's container for your course. Some module properties are common to all types of learning module, while others are specific to particular learning types. Properties are grouped into separate pages in the Catalog Editor relating to different areas of module configuration, such as catalog setup, enrollment, and cost and payment details.

Click the links below to learn more about the module properties configured in the Catalog Editor.

Catalog Setup

- Module Properties (for catalog setup)

- Cost Information

- Objectives

- References

- Associated Programs

- Revisions and Launch Preview

- Virtual Archive

- Checklist

- Recommended Class Resources

Access Control / Enrollment Control

- Module Security

- Prerequisites

- Recommended Courses

- Exam / Certification / Evaluation

- Supervisor Assessment

- Enrollment Policy

- Enrollment Restriction

- Email Preferences

Knowledge Center Setup

- Setup Options

Launch Setup

- Launch Properties

- Proxied Launch Package

Additional Information

Define Module Properties

Define Module Properties

The module properties for catalog setup are used to classify the course in the catalog and appear in the Course Details page and Knowledge Center.

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

To configure module properties for catalog setup

1. Go to **Manage Center > Learning > Learning Modules** , and click the name of the module to open. The Catalog Editor opens at the Define Module Properties page.

2. Configure the properties as required.

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

Additional Information

Module Properties for Catalog Setup

About Learning Modules

About Module Properties

Module Properties for Catalog Setup

The tables below describe general learning module properties relating to catalog setup. This information is used to classify the course entry within a catalog.

Table: Learning Module Details

Property	Description
Title	The module title appears in the catalog and the course details page. It should be concise and explicit. Module titles are saved in the learner's transcript (their learning record), they are searchable in the catalog, and could even be used for legal or regulatory purposes. This is a mandatory field.
Description	The module description appears in the catalog and the Course Details page. It should be concise and explicit. Module descriptions are saved in the learner's transcript, they are searchable in the catalog, and could even be used for legal or regulatory purposes.
More Information Hyperlink	You can enter a link to a website with information or resources related to the course. The More Information Hyperlink is shown in the Course Details and Knowledge Center.
Language	All learning modules can be delivered in a specific language you select from the list. For learning modules with more than one session, such as classroom-based courses available in different locations, you can define the learning module as multi-language and specify the delivery language for each session. The languages available are determined by the languages purchased by your organization. The languages available for the module are shown in the Catalog Browser, Catalog Search results, Course Details and Knowledge Center. This is a mandatory field.
Vendor	You can select the course vendor from the drop-down list. You set up vendors on the Vendors page. This information is not shown in the Course Details.
Duration Comments	You can add the course duration, which is shown in the Course Details and Knowledge Center.
Support Contact	You can enter the name of one or more people who can provide learners with support for enrollment or participation in the course. This information is shown as plain text in the Course Details and Knowledge Center (that is, HTML markup, such as email links, are not implemented).

Enable Progress Tracker	Check this box to enable the Progress Tracker for Programs. The Progress Tracker shows learners their month-by-month progress through each of the Program's constituent modules on a calendar page.
	When enabled, the Progress Tracker link is shown for the Program on the Current Learning Modules tab on the Learning page, and also in the Training Progress widget on the Widget page.
	This property applies only to Program learning types.
Display "Indicate Interest"	Check this box to enable learners to indicate their interest in taking the course if they are unable to enroll. You can enable them to provide up to three preferred dates and a comment, or just a comment.
	Allowing learners to indicate their interest in taking a course can be useful for scheduling classroom or virtual classroom sessions.
	If you provide this option, a link is shown in the Course Details, enabling learners to indicate their interest.
	The Indicate Interest property is not applicable to Just-in-Time learning modules.
Show on other resources tab instead of enrolled learning modules tab (tabbed interface only)	This check box is shown only if the *Show other resources tab (tabbed interface only)* System Configuration setting is enabled. Select this check box to show the learning module in the Other Resources page in the Learning Center.
	The Other Resources page must be included in the navigations.xml file used for the LMS's skin, as shown in this example navigations.xml extract:

```
<item labelKey="label.LearningCentre"
txCode="TABLISTSESSIONS">
    <menu cssClassName="submenu">
      <item labelKey="heading.currentCourses"
txCode="TABLISTSESSIONS" />
        …
      <item labelKey="label.Other_Resources"
txCode="OTHERRESOURCES" />
        …
```

You can configure who is eligible to approve the task completion using the Signoff Options properties for Task learning modules.

Table: Signoff Options

Property	Description
This task should be marked as completed by	Select from the options who can mark the task as completed: • The learner • The learner's Direct Appraiser • Any user who is the learner's Supervisor • Any user who is an instructor of this task (through manual or dynamic assignment) • Any user matching the following criteria: If you select the last option, you can select any individual user, or users who belong to specific user groups, roles and organizations, or a combination of those criteria.
Check pre-requisites before marking task as completed	Select this check box to ensure that the task cannot be marked as completed unless the configured prerequisites (if any) have been met.

You can assign modules to one or more catalogs using the Catalog Configuration properties.

Table: Catalog Configuration

Property	Description
Visibility	Check this box to show the learning module in the catalog or catalogs you select in the *Assign catalog* field. Only check this box for courses that learners can enroll themselves in. If you don't need learners to see the course details in the catalog, you can clear this check box. **Select the Show in Catalogs check box last, after you have saved all the other module properties**. As soon as you save the properties in the Catalog Editor (with this check box selected), the module becomes visible to learners looking for courses. If other essential properties have not been configured yet, learners may encounter errors if they try to enroll in the course.

Category	You can select a category from the drop-down list to assign the learning module to it.
	You can use categories to group courses with related subjects. Learners can refine a catalog search by subject but not category. Admins can search on both category and subject, via the advanced filters on the Learning Modules page in the Manage Center.
	You set up categories on the Categories page.
Subject	You can select a subject from the drop-down list to assign the learning module to it.
	A subject is the general topic covered by the course. You can group courses with related subjects in a particular category to help you organize your learning modules.
	Learners can refine a catalog search by subject.
	You set up subjects on the Subjects page.
Assign catalog	You have to add a module to a catalog so that it can be found in Catalog Search. You can add a module to multiple catalogs.
	Click the Assign catalog field name to open the Catalog Selector, where you can select one or more catalogs to add the course to.
	The catalogs the module has been assigned to are listed in the box.
Image for Catalog Display	Click the **browse** icon to open the Repository Manager, where you can select an image file to use in the catalogs the module has been added to.
	Images are displayed in different aspect ratios in the legacy user interface (UI) and new responsive UI.
	In the legacy UI, to see the whole image in the catalog, it must be no bigger than 150 x 150 pixels. If you select an image with greater dimensions, the Image Editor opens and you can either select a cropped area of the image to use, or scale the image to fit 150 x 150 pixels. Scaling non-square images changes the aspect ratio so they may appear stretched or squashed in one dimension.
	The new responsive UI displays course and catalog images in approximately a 16:9 width-to-height ratio. Any image size greater than 500 pixels wide can be used and will be scaled without distortion to fit.
	Click the **Reset** icon to reset the image to the default.

You can describe one or more target audiences for the course.

Table: Who should take this?

Property	Description
Audience	You can enter a description of the target audience for the course. You can specify multiple audiences, each in their own *Audience* text box.

You can select and configure the collaboration tools that are available to learners for the course.

Table: Collaboration Tools

Property	Description
Forum	Check this box to include in the Knowledge Center > Forum page a link to either the forum category or to a specific forum.
Peer Review/Comments	Check this box to include in the Knowledge Center the option for learners to rate the module and leave a comment. All learners with access to the Knowledge Center for the course can see the rating and peer comments left by others.

You can enter values for optional module attributes, which you can also include in the advanced filters on the Learning Modules page in the Manage Center.

Additional Information

Define Module Properties

About Module Properties

About the Progress Tracker

About the Repository Manager

Configure Cost Information for a Learning Module

Course administrators can configure cost information for the module and then configure its sessions to use it. You can also configure sessions to override the module level cost information and define it at the session level.

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

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

To configure cost information

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module to open. The Catalog Editor opens at the Define Module Properties page.

2. Click **Enter cost information** in the Module Properties tab. The Cost Information page opens.

3. Enter the cost information properties. For more information, see Cost Information Field Reference.

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

Additional Information

Cost Information Field Reference

Configure Cost Information for a Session

About Token Payments

Create an Optional Payment Item

Pay for Course Enrollment with a One-off Token Payment

Refund a One-off Token Payment

Cost Information Field Reference

The following cost properties specify how the course, session or program costs are registered in the Accounts tab in the participant's profile when they enroll. Cost information can be configured at the module level and—optionally—at the session level, which takes precedence over the module cost information.

Table: Cost/Enrollment Information

Property	Description
Charge Procedure	Select from the drop-down list how the course cost is registered and charged. Select **Charged per Registration** to register a charge each time a participant enrolls in the course. The cost is registered in the Accounts tab in the participant's profile. You cannot add optional payment items to this type of charge. Select **Online Payment** to enable the participant to make the payment via an online payment gateway or with tokens. Online payments can be configured to accept tokens or currency, and enable you to charge for optional payment items. Select **Organization One Off Token Payment** to charge a one-off amount for an entire module and debit this amount from the organization's token account instead of charging per individual learner enrollment. For sessions, you can choose to use the setting configured at the module level or select a different procedure.
Charged Cost Center	For non-token payment, you can enter the name of a cost center to associate the charge with. If you enter a cost center, it overrides the cost center defined for the learner (if applicable) in the User Editor. Otherwise, leave this field blank to use the learner's cost center. If the *Show additional enrollment information in records/transcript* System Configuration setting is enabled, the Charged Cost Center is shown in the Knowledge Center > Records/Transcript area.
Currency	For non-token payment, select from the drop-down list the currency in which the course is charged. The currency is shown in the Course Details for each module session.

Cost	For non-token payment, enter the cost in the selected currency.
	For token payment, enter the number of tokens to charge for the course.
	For organizational one off token payments, enter the number of tokens to charge and click **Deduct Payment** to take the token payment from one or more organizations.
	The cost is shown in the Course Details for each module session.
Price Info	You can include any extra information about the course cost here for any of the charge procedures except Organization One Off Token Payment.
	The price information is shown in the Course Details for each module session.

Optional Payment Items

Optional payment items can represent generic categories of items, such as textbooks, starter packs or accommodation, and can be used for multiple courses.

You can specify the costs of optional payment items for learners to buy when they are buying a course. You can configure the cost of the items at the module or session level, so each session can have its own pricing. You can also specify the cost type of optional payment items, which determines how the cost of each is calculated.

Table: Optional Payment Items Cost Types

Optional Payment Item Type	Description
Per Night of Course	This is calculated based on the total number of days that the course session spans minus one. For example, if a course session spans five days (that is, starts on Monday and ends on Friday), the computed duration for the payment item will be four.
Per Business Night	This is calculated based on the number of business nights that the course spans. It does not include Friday, Saturday, and Sunday nights or the last day of the course. For example, if a course session spans 14 calendar days (starts on a Tuesday, 1st September and ends Monday, 14th September), the computed duration for the payment item will be seven business nights.
Per Week of Course	This is calculated based on the number of weeks that the course spans. It does not take into account the fact that seven days equals one week. As long as the course spans on a week, the week is then counted.
Per Unit	This is calculated based on the number of units the participant buys.
% of Course Cost	The cost for this payment item is calculated based on a percentage in relation to the course cost.

Additional Information

Configure Cost Information for a Learning Module

Configure Cost Information for a Session

About Token Payments

Create an Optional Payment Item

Pay for Course Enrollment with a One-off Token Payment

Refund a One-off Token Payment

About Optional Payment Items

Optional Payment Items are resources that learners can buy when they buy a course which is configured for online payment. You may wish to set up optional payment items for generic categories of items that are available for multiple courses, such as participant packs or accommodation.

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

To manage optional payment items, go to **Manage Center > Learning > Optional Payment Items**.

Additional Information

Create an Optional Payment Item

Update or Delete an Optional Payment Item

Create an Optional Payment Item

Course administrators can create an optional payment item for courses that are paid for using online payment gateways. Optional payment items are listed in the Cost Information page in the Catalog Editor (but enabled only for the *Online Payment* charge procedure).

To create an optional payment item

1. Go to **Manage Center > Learning > Optional Payment Items**. The optional Payment Items page opens, listing any existing items.

2. Click **+ Add Payment Item**. The optional Payment Item page opens.

3. Enter the name of the item.

4. Optionally, enter the translation label key if you want the item to be displayed in other languages. Leave this field blank to use the value provided for the item name.

5. Optionally, enter a description for the item.

6. Click **Add** to save the item.

Additional Information

About Optional Payment Items

Update or Delete an Optional Payment Item

Update or Delete an Optional Payment Item

Course administrators can update or delete optional payment items.

To update or delete an optional payment item

1. Go to **Manage Center > Learning > Optional Payment Items**. The optional Payment Items page opens, listing any existing items.

2. Click the name of the item to update or delete. The Optional Payment Item page opens.

3. To update the item, edit its properties as required and click **Update**.

4. To delete the item, click **Delete**.

Additional Information

About Optional Payment Items

Create an Optional Payment Item

Enter Objectives

Course administrators can enter a list of objectives for a course, which are included in the course details shown in the Knowledge Center.

The objectives are shown as a bulleted list. Initially you can enter up to 11 objectives. If you want to add more, click the **More Objectives** link at the bottom of the list.

You can include HTML tags in the objectives to help format the text in each. For example:

- Enclose text in `<strong> </strong>` tags to make it **bold**.

- Enclose text in `<em> </em>` tags to make it *italic*.

- Split a single objective bullet point into two or more lines by including the `<br>` tag to end a line of text.

You can also enclose text in `<span style="`*style definition*`"> </span>` to use CSS to style text in an objective. For example, to highlight the word *management* with a yellow background, you would enter the objective as:

```
Train the <span style="background:yellow;">management</span> in the use of...
```

About Reference Resources

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

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

- A file uploaded to the LMS Repository

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

Learners and instructors can access resources from these areas of the LMS:

- The Course Details page (if catalog access has been enabled)

- Knowledge Center (Reference Resources page and Overview page)

- Universal Search > Reference Resources

Additional Information

Add Reference Resources to a Learning Module

Delete Reference Resources from a Learning Module

About the Repository Manager

Add Reference Resources to a Learning Module

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

To add a reference resource to a learning module

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module to open. The Catalog Editor opens at the Define Module Properties page.

2. Click **Enter references** in the Module Properties tab. The Reference Resources page opens.

3. Click **Add New Reference**. The Add New Reference modal pop-up opens.

4. To include a file from the Repository, click the **browse** icon to open the Repository Manager, where you can select the file.

5. To include a file or embedded content from outside of the LMS, enter the URL.

6. Select the check boxes to specify whether learners, instructors or both can access the resource.

7. Select the Reference Type.

8. Select the check box if you want to include a link to the resource in the catalog, which allows people to download it without having to enroll in the course first. You can also enable or disable catalog access to the resource from the action menu on the Reference Resources page.

9. Click **Add** to create the reference to the resource in the LMS.

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

Additional Information

About Reference Resources

Delete Reference Resources from a Learning Module

About the Repository Manager

Delete Reference Resources from a Learning Module

If you have unrestricted access permission to edit a learning module, you can delete reference resources assigned to it. Deleting a reference resource does not remove it from the repository.

To delete a reference resource from a learning module

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module to open. The Catalog Editor opens at the Define Module Properties page.

2. Click **Enter references** in the Module Properties tab. The Reference Resources page opens and lists the reference resources assigned to the module.

3. Select the check boxes of the references you want to delete and select **Delete** from the Bulk Action drop-down list.

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

Additional Information

About Reference Resources

Add Reference Resources to a Learning Module

About the Indicated Interest List

The Indicated Interest List shows the learners who have indicated their interest in enrolling in the course. Learners may indicate their interest in taking a course in the Course Details page if the Display *Indicate Interest* check box is selected on the Define Module Properties page in the Catalog Editor.

The table shows:

- The learner's name

- Their email address

- Their preferred dates (if allowed)

- The date on which they indicated their interest

Additionally, you can move the pointer over the learner's name to view their comment.

For each learner in the list you can:

- Enroll them in the course, selecting a session for them

- Send them an email

- Remove them from the Indicated Interest List

You can select one of the options from the action menu for individual learners in the list, or you can check the boxes of multiple learners and select an action from the Bulk Action drop-down list.

When you enroll one or more learners, you select a session and then group enroll them in the session from the Group Enrollment page in the Session Properties tab. On successful enrollment, the learner is automatically removed from the Indicated Interest List.

You can administer the Indicated Interest List in the Catalog Editor or the Indicated Interest List Administration page. To open the Indicated Interest List in the Catalog Editor, go to **Manage Center > Learning > Learning Modules** and select a learning module. To open the Indicated Interest List Administration page, go to **Manage Center > Learning > Indicated Interest Administration**.

Additional Information

Define Module Properties

Group Enroll or Withdraw Learners in a Session

Indicated Interest List Administration

Indicated Interest List Administration

Administrators can review all learners who have indicated their interest in enrolling in a course. In the Indicated Interest List Administration page you can:

- Filter the list of learners

- Send them an email, individually or in bulk

- Remove them from the indicated interest list, individually or in bulk

To administer the indicated interest list, your user role must have unrestricted access to the *Catalog Manager* feature in System Roles (Manage Features > Catalog Manager Features).

To open the Indicated Interest List Administration page

1. Go to **Manage Center > Learning > Indicated Interest Administration**.

2. To send an email to an individual learner for a specific course, select **Send Mail** from the corresponding action menu in the list.

3. To send an email to multiple learners, select the corresponding check boxes in the list and then select **Send Mail** from the Bulk Action drop-down list.

4. To remove a learner from an indicated interest list for a course, select **Remove** from the corresponding action menu in the list.

5. To remove multiple learners from the indicated interest lists for one or more courses, select the corresponding check boxes in the list and then select **Remove** from the Bulk Action drop-down list.

Additional Information

About the Indicated Interest List

Configure Associated Programs

Course administrators can see which program sessions include the learning module being edited in the Catalog Editor.

For each associated program session, you can:

- View the program module properties

- View the program session properties

- Run a session enrollment update (also available as a bulk action)

- Update the deadline for participants

- Edit the association (also available as bulk action)

- Remove the association

You can select the actions above from the action menu for individual program sessions in the list, or you can check the boxes of multiple program sessions and select an action from the Bulk Actions drop-down list.

If you are editing a session, you can assign the it to one or more program sessions, including specifying program module settings like Required and Auto-Enroll. To assign a session to a program session, click **+ Add to Program Session**.

To configure associated programs

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to configure associated programs for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Associated Programs** in the Module Properties tab. The Associated Programs page opens.

3. Select an action from the action menu.

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

Session Enrollment Update

When the structure of a program session changes, it is sometimes necessary to explicitly update enrollments to reflect the new structure. Session Enrollment Update re-runs enrollment processing for the session.

When you run a program session enrollment update, you can choose one or more of the following options:

- Update the current program session enrollments for participants currently enrolled in the session

- Re-enroll learners who have previously completed the program session

- Send an email notification to each learner affected by the enrollment update

Progress Tracking Deadline Update

Participants must complete assigned modules by the deadlines specified in the Learning Program Session Module Assignment page to maintain a program progress of *On Target*. Deadlines are calculated and fixed at the time of enrollment, so changing a deadline in program's session properties affects only learners who enroll after it has been changed.

To apply an updated deadline to participants already enrolled in an associated program, select **Update Deadline of Users** from the action menu of the session.

To apply an updated deadline to multiple associated programs, check the boxes of the associated programs in the list and then select **Update Deadline of Users** from the Bulk Action drop-down list.

Edit the Association

You can update one or more module's weighting, order and credits for the associated program session, specify whether it is required, and run an enrollment update.

Remove the Association

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

Additional Information

About Learning Programs

Session Enrollment Update

Learning Program Session Module Assignment

About Revisions and Launch Preview

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

Each revision can be in one of three states: Effective, Approved or Preview. Only the Effective revision is available to learners for enrollment.

When you import a revision you can make it available to learners immediately or mark it for preview by course administrators only. Revisions marked for preview are suffixed with *(Preview)* in the revisions list and are not available to learners.

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

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

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

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

Importing Revisions for Modules Associated with Programs

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

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

> (i) While not recommended for regulated environments, you can have the option to publish new revisions to learners whose status in earlier revisions is *Completed*. Learners reopening the completed course will launch the effective revision but it will still be marked as completed.
>
> The option *All enrolled learners, including those who have already completed the course* is provided only when it is enabled in System Configuration. To enable this option, go to **Manage Center > System > System Configuration** and select the check box labelled *Allow administrators to publish new revisions to learners whose status in earlier revisions is Completed*.

Approved Revisions

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

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

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

- A revision is marked as Approved and learners have not yet completed an earlier Approved revision.
  This acts as an auto carry-forward before the newest Approved revision nullifies any previous Approved revision.

- A learner completed a revision and there is an Approved revision to be taken.
  This is the auto get ahead logic for those who have previously completed the module.

- A learner who will complete any revision and there is an Approved revision to be taken.
  This is the auto get ahead logic for those who will complete an earlier revision.

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

Additional Information

[Import a Module Revision in the Catalog Editor](#)

[Approve a Module Revision](#)

[Make a Preview Revision Available to Learners](#)

[About Importing Module Revisions](#)

[Import a Module Revision in the Import Content Package Wizard](#)

Approve a Module Revision

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

To approve a Preview revision

1. Go to **Manage Center > Learning > Learning Modules** and select the module to update. The Catalog Editor opens at the Define Module Properties page.

2. Click **Revisions and Launch Preview** in the Module Properties tab. The Revisions and Launch Preview page lists the revisions for the module.

3. Select **Mark as Approved** from the revision's action menu. You are asked to confirm the approval in a pop-up dialog.

Additional Information

About Revisions and Launch Preview

About Importing Module Revisions

Make a Preview Revision Available to Learners

Make a Preview Revision Available to Learners

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

To make a Preview revision available to learners

1. Go to **Manage Center > Learning > Learning Modules** and select the module to update. The Catalog Editor opens at the Define Module Properties page.

2. Click **Revisions and Launch Preview** in the Module Properties tab. The Revisions and Launch Preview page lists the revisions for the module.

3. Select **Mark as Effective** from the revision's action menu. The Mark as Effective dialog opens where you can select who to make the new revision available to.

Additional Information

About Revisions and Launch Preview

About Importing Module Revisions

Approve a Module Revision

Archive a Module

You can archive a module when you no longer want learners to enroll in it. Archived modules are marked as *virtually archived* because no files or records are deleted from the LMS; training records relating to virtually archived modules are kept and reports still include data about archived modules. When you archive a module it is removed from the catalog and catalog search, and learners can not enroll in it.

You can archive a module immediately or specify a date on which the LMS will archive it automatically, using a background process.

You can also remove a module from the virtual archive to make it available to learners again.

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

> ⓘ Participants who are currently enrolled in a course when it is archived can still access it until it is marked as completed.

To archive a module

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to archive. The Catalog Editor opens at the Define Module Properties page.

2. Click **Virtual Archive** in the Module Properties tab. The Virtual Archive page opens.

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

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

Additional Information

Delete a Learning Module

About Learning Modules

About Course Checklists

You can configure checklists to track preparatory tasks such as booking a venue for classroom training, plane tickets and hotels for participants. For a module, you can configure a checklist that applies to all sessions, and in Session Properties you can configure checklist items specific to individual sessions, which can have a more flexible deadline relative to the session start or end date. You can choose to create your own checklist item or base it on a predefined template.

When you create a checklist item you assign it to an owner, that is, the person responsible for completing it. When you assign a new owner, they are sent an email notification using the email template specified in the *Course Checklist Owner Change Email Template* setting in System Configuration. To select a specific email template, go to **Manage Center > System > System Configuration**, select the **Catalog** category and click the **browse** icon for the *Course Checklist Owner Change Email Template* setting.

If you set a deadline for completion of the checklist item, the LMS can send a reminder email to the item owner a specified number of days before the deadline, using an email template specified in the *Course Checklist Item Reminder Email Template* setting in System Configuration. To select a specific email template for the reminder, go to **Manage Center > System > System Configuration**, select the **Catalog** category and click the **browse** icon for the *Course Checklist Item Reminder Email Template* setting.

To configure the course checklist for a module or session, or to review checklist items, go to **Manage Center > Learning > Learning Modules** and select a learning module. The Checklist page is available for modules and sessions.

Relative Deadlines for Session Checklist Items

To provide more flexibility in setting the deadline, other than a fixed date, you can configure the deadline of a checklist item to be relative to the session's start or end date. The session must have a defined start or end date in order to do this.

> ⓘ Note that for online learning modules this option is available when the system configuration setting *In catalog editor, show start date and end date fields for online modules* is enabled.

Checklist Templates

You can create checklist templates, which are containers for one or more checklist items that you can apply to any number of learning modules or sessions. This saves time as you can create common checklist items once and apply them multiple times instead of having to re-create them each time. You can use the Permissions selector to configure who can view and who can edit checklist templates.

Reviewing Checklist Items

Course administrators can review checklist items in the Catalog Editor or—if you are the item owner—on the Course Checklist page. Course instructors can review their assigned checklist items on the Course Checklist page. In either case, when a checklist item is done, you mark it as complete.

LMS administrators and instructors must have unrestricted access to the *Course Checklist* Role Access Control in order to review checklist items and mark them as complete.

Additional Information

Configure Checklist Items

Create a Checklist Template

Review a Course Checklist

Permissions

Configure Module Checklist Items

Course administrators can configure checklists for learning modules and sessions to track preparatory tasks such as booking a venue for classroom training, and plane tickets and hotels for participants. You can create a new checklist item by completing the required checklist item fields, or you can generate one or more checklist items from a predefined template.

When you generate checklist items from a template, you can edit each item if required, assigning it to a different owner, for example.

To create a checklist item

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to configure a checklist for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Checklist**. The Checklist page opens and by default lists any previously created checklist items that have not been completed.

3. Select **Create New Item** from the Create Checklist Item drop-down list. The Create Item dialog opens.

4. Enter a descriptive name for the item.

5. Assign an owner to the checklist item. Optionally, click the **browse** icon and select the LMS user to assign it to. When you assign a new owner, they are sent an email notification immediately.

6. To set a deadline for a module checklist item to be completed, select a date from the Deadline date picker field.

7. To send a reminder email to the item owner a specified number of days before the deadline, select the **Send reminder** check box.

8. Click **OK** to save the checklist item.

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

To generate a checklist from a template

1. Repeat steps 1 and 2 above to navigate to the Checklist page in the Catalog Editor.

2. Select **Generate from Template** from the Create Checklist Item drop-down list. The Create Item dialog opens.

3. Select the template from which to add the checklist items from the drop-down list and click **OK**. The checklist items defined in the template are added to the checklist.

4. To edit a checklist item, select **Edit** from its action menu.

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

Additional Information

Create a Checklist Template

About Course Checklists

Create a Checklist Template

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

To create a checklist template

1. Go to **Manage Center > Learning > Checklist Template**. The Checklist Template page opens, listing any previously created templates.

2. Click **+ Create Checklist Template** or, to edit an existing template, click the template name in the list. The Create/Edit Checklist Template page opens.

3. Enter a descriptive name for the template in the Template Name field.

4. Click **+ Create Checklist Item** to add an item to the template. The Create Item dialog opens. You can add any number of checklist items, configuring them one at a time.

5. Configure the checklist item fields.

6. Repeat steps 4 and 5 until you have added all of the required checklists items to the template.

7. To edit a checklist item in the template, select **Edit** from its action menu.

8. To delete a checklist item from the template, select **Delete** from its action menu. When you delete a template the checklists created from that template are not deleted from the modules or sessions they have been added to.

9. Click **Permissions** to configure the read-only and unrestricted access to the template. Read-only permission allows LMS users to view the template and use it to generate checklists in the Catalog Editor. Unrestricted permission allows users to edit the template checklist items in addition to using templates in the Catalog Editor.

10. Click **Save** to save the template. Course administrators can now generate checklist items from the template.

Additional Information

About Course Checklists

Configure Module Checklist Items

Configure Session Checklist Items

Permissions

Review a Course Checklist

Course instructors can review checklist items assigned to them in the Workspace > Course Checklist page. Course administrators can also review the status of checklist items in the Catalog Editor.

When you open the Course Checklist page from the Workspace menu you see a list of checklist items assigned to you that have not been completed. For a module checklist item, only the module title is shown; for a session checklist item, both module and session title (or session code if session title absent) are shown.

When you have completed a checklist item, you update its status from Incomplete to Completed. You can also revert the status of an item from Completed to Incomplete.

To review a course checklist that has been assigned to you

1. Go to **Home > Workspace > Course Checklist**. The Course Checklist page opens and lists all incomplete items assigned to you.

2. Select the course and session from the drop-down lists and click **Filter**.

3. To update the status of an item to Completed, click its **check mark** icon. Its status is updated to Competed with the current date, time and your user name. Repeat this step for all items you want to mark as completed.

4. To revert the status of a completed item to Incomplete, filter the list to show completed items, then click its **check mark** icon. The status changes back to Incomplete and the date, time and user name are removed.

To update the status of a checklist item in the Catalog Editor

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to configure a checklist for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Checklist**. The Checklist page opens.

3. Filter the list to show either or both completed and incomplete checklist items by selecting an option from the Item Status drop-down list.

4. To update the status of a checklist item, select **Mark as Completed** or **Mark as Incomplete** as required from its action menu.

Additional Information

[About Course Checklists](#)

About Recommended Class Resources

The Recommended Class Resources page lists the resources recommended for the module's classroom sessions. You can add and remove resources recommended for the module.

The list of recommended class resources includes class resource attributes, which are properties you can define for your class resources. When you select resources to add to the list, you can search for resources and filter the results on their attributes. For example, different projector class resources could have an attribute that specifies whether it is HDMI compatible and another that specifies whether it is VGA compatible, so that you can select the correct projector based on the computer's video output standard.

You can define class resources in the Class Resources page, and resource attributes in the Class Resource Attributes page.

To configure recommended class resources for a session, your user role must have unrestricted access to the Catalog Editor (Manage Features > Catalog Manager Features).

You configure recommended class resources in the Modules tab in the Catalog Editor. To open the Catalog Editor, go to **Manage Center > Learning > Learning Modules** and select a learning module.

Additional Information

Configure Recommended Class Resources

About Class Resources

About Class Resource Attributes

Configure Recommended Class Resources

Course administrators can add class resources that are recommended for this course, or remove any that are no longer recommended. Recommended class resources will be automatically loaded when new classes are added to the class schedule for a session of the course.

To add a recommended class resource

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the classroom based module you want to recommend a class resource for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Recommended Class Resources** in the Module Properties tab. The Recommended Class Resources page opens and lists any class resources recommended for the course.

3. To add one or more resources, click **+ Add Resource**. The Resource Name selector page opens, in which you can search for resources using multiple criteria, including class resource attributes.

4. When you have selected the class resources, click **OK**. You are returned to the Recommended Class Resources page, which now lists the recommended class resources you selected.

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

Additional Information

About Class Resources

About Recommended Class Resources

Define Module Security

Course administrators can configure access permissions for a learning module to specify who can view it or make changes to it.

To allow administrators to view and edit the module details, you must give them unrestricted access permission. To prevent them from making changes, give them read-only access.

To allow course instructors to administer a specific learning session from the Session Administration page, you must give them read-only access permission to the session. To allow instructors to administer all sessions for a learning module, you must give them read-only access permission to the learning module (in which case you do not need to give them permissions for each session).

You must also give learners read-only access to a module to enable them be enrolled in it.

To configure the permissions for a learning module

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to set the permissions for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Define Module Security** in the Module Properties tab. The Define Module Security page opens.

3. Click **Permissions**. The Permissions Selector opens.

4. Select the users to give read-only access to (that is, learners and instructors).

5. To give other administrators unrestricted access to be able to edit the module, click **Unrestricted Access** and select the users.

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

Additional Information

Permissions

User Selector

Assign Prerequisites

Course administrators can assign prerequisites to learning modules to ensure that participants are properly prepared for a course. You can assign two groups of one or more prerequisite learning modules. Each group can require all (AND logic) prerequisites to be met or at least one (OR logic). For each group you can select how the prerequisites have been met (for example, the overall status must be set to *Completed*).

To assign prerequisites to a module

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to assign one or more prerequisite modules to. The Catalog Editor opens at the Define Module Properties page.

2. Click **Assign Prerequisites** in the Module Properties tab. The Assign Prerequisites page opens.

3. Click the **Assign prerequisites** link. The Currently Required Module(s) page opens in a new window.

4. Enter a search term to search for the prerequisite module or select a catalog and learning type to help refine the search results.

5. Click **Filter**. The learning modules matching your search criteria are listed in the Available Choices box.

6. Select one or more modules in the list and click the down-facing chevron to add them to the Selections box.

7. Repeat steps 4 to 6 to search for other learning modules, if required. To remove a module, select it in the Selections box and click the up-facing chevron.

8. Click **OK** to return to the Assign Prerequisites page.

9. Select the prerequisite check type from the drop-down list. It will be applied to all of modules in the Currently Required Module(s) list.

10. If you assigned more than one prerequisite learning module, select from the Prerequisite Business Logic drop-down list whether the check type condition must be met by all prerequisites (**Use AND logic**) or just one (**Use OR logic**).

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

12. To assign a secondary set of prerequisites, which must be met in addition to the first, repeat steps 2 to 11 above.

Assign Recommended Courses

Course administrators can assign one or more courses to recommend to learners to complement a learning module. Recommended courses are listed in the Course Details page. Learners can click the name of the recommended course to open its Course Details page and enroll or request enrollment as required.

Unlike prerequisites, recommended courses are not mandatory.

To assign a recommended course to a learning module

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to assign the recommend course to. The Catalog Editor opens at the Define Module Properties page.

2. Click **Assign Recommended Course(s)** in the Module Properties tab. The Assign Recommended Course(s) page opens. Any recommended courses are listed in the Currently Added Modules box.

3. Click the **Assign Recommended Course(s)** link. A selector page opens in which you can search for courses.

4. Enter or select any of the search criteria for the course(s) you want to recommend. You can search on the module name or description in the Search text box, select a catalog, and select a learning type.

5. Click **Filter** to see the courses matching your criteria.

6. To add one or more courses to the list of recommended courses, select each course in the Available Choices box and click the single chevron to move them to the Selections box.

7. Repeat steps 4 to 6 to find other courses as required, and then click **OK**. The courses are added to the Currently Added Modules box.

8. To remove courses from the Currently Added Modules box, select them and click the **Remove Recommended Course(s)** link.

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

Additional Information

Search Guidelines

Assign Exams, Certifications and Evaluations

Administrators can assign one or more exams, a certification and an evaluation to a learning module. The exams, certification and evaluation must have been configured in their respective areas of the Manage Center.

To assign exams, certifications and evaluations to a learning module

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to assign the exams, certifications or evaluations to. The Catalog Editor opens at the Define Module Properties page.

2. Click **Assign exam/certification/evaluation** in the Module Properties tab. The Associated Exams/Certification/Evaluation page opens.

3. Assign the exams, certification or evaluation as described in the sections below, which correspond to the three sections of the Associated Exams/Certification/Evaluation page in the Catalog Editor.

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

Exams

You can select any number of exams and specify whether they are mandatory, and whether passing all or any of them automatically completes the learning module for the participant. You can also select the language the exam will be delivered in, if it is available in more than one.

Course participants can launch exams from their Learning Center and the Knowledge Center.

For On-the-Job Training learning types, you can assign *Supervisor Assessment* exams, intended to be competed by the participant's direct appraiser or supervisor. The participant cannot complete the course themselves, its completion depends on the assessment exam taken by the direct appraiser or supervisor.

To assign one or more exams

1. To assign one or more exams, click the **+** icon. A selector page opens in which you can search for and select exams.

2. If you want to make it mandatory to pass **all** of the selected exams in order for the participant to complete the module, select the **Mandatory** check box.

3. Select whether passing the exams automatically completes the module for the participant.

4. For exams available in more than one language, select from the Delivery Language drop-down list how the delivery language is determined.

Certification

You can select a certification to associate with the learning module. Certificates are typically awarded on completion of the course or, if there is an associated certification exam, on passing the exam.

To assign a certification

1. Click the **browse** icon in the Certification field. A selector page opens in which you can search for and select a certification.

2. To remove the certification, click the **delete** icon. The certification name is removed from the Certification field.

Evaluation

Evaluations are a type of exam. You can select an evaluation to associate with the learning module, and specify whether it is mandatory for participants to complete it.

To assign an evaluation

1. Click the **browse** icon in the Evaluation field. A selector page opens in which you can search for and select an evaluation.

2. To remove the evaluation, click the **delete** icon. The evaluation name is removed from the Evaluation field.

Additional Information

Associated Exams/Certification/Evaluation Field Reference

Associated Exams/Certification/Evaluation Field Reference

The table below describes the fields in the Associated Exams/Certification/Evaluation page in the Catalog Editor.

Table: Associated Exams/Certification/Evaluation Field Reference

Field	Description
Exams	Click the **+** icon to select one or more exams to associate with the learning module.
Mandatory	Select the check box to make it mandatory to pass **all** of the selected exams in order for the participant to complete the module.
Passing exam(s) automatically completes this module	Select whether passing the exams automatically completes the module for the participant.
Delivery Language	For exams available in more than one language, select from the Delivery Language drop-down list how the delivery language is determined. **Auto-Select** The LMS delivers the exam in a language using the following order of precedence: 1. The exam is delivered in the same language as the module it is assigned to, if the exam is available in that language. 2. The exam is delivered in the language specified in the participant's User Preferences setting, if the exam is available in that language. 3. The exam is delivered in the language specified for the exam in the Exam Manager. **Selection on Launch** The participant can select any of the languages available for the exam when they launch it. **Specific Language** The exam is delivered in the language you select from the Delivery Language drop-down list.
Certification	Click the **browse** icon to select a certification. To remove the certification, click the **trashcan** icon.
Evaluation	Click the **browse** iconto select an evaluation. To remove the evaluation, click the **trashcan** icon.

| Mandatory | Select whether passing the evaluation is mandatory for participants to complete the module. |

Additional Information

Assign Exams, Certifications and Evaluations

Assign Supervisor Assessment

Course administrators can assign one or more supervisors and a supervisor assessment exam type only to On-the-Job (OTJ) learning types. The supervisor must complete the associated supervisor assessment exam for the participant to complete the course. Assigning one or more default supervisors on this page means that all participants for the course must be assessed by the selected supervisor (or one of several, if specified). Alternatively, you can specify supervisors for individual participants or those in a group enroll for OTJ courses.

Subject to availability, you can also choose the language that the supervisor assessment is delivered in. The default selection is Auto-Select, which delivers the assessment in the same language that the OTJ training course was delivered, if possible. You can allow the supervisor to select a language when they launch the assessment, or you can select a specific language from those available for the assessment.

To assign a supervisor assessment to an OTJ learning module

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the OTJ learning module you want to assign a supervisor assessment to. The Catalog Editor opens at the Define Module Properties page.

2. Click **Assign Supervisor Assessment** in the Module Properties tab. The Assign Supervisor Assessment page opens.

3. Click the **browse** icon to select a supervisor assessment exam to complete the OTJ training. The Supervisor Assessment selector page opens in a new window.

4. Select the Supervisor Assessment exam for the OTJ course.

5. Select one or more check boxes to specify who can carry out the supervisor assessment. The learner's direct appraiser is selected by default. To select one or more LMS users who are not the learner's direct appraiser or supervisor (as configured in the user's profile), click the **Select** link. The Permission Selector page opens in a new window.

6. Optionally, select the supervisor assessment delivery language from the drop-down list.

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

Additional Information

About On-the-Job Training

Define an Enrollment Policy for a Learning Module

Course administrators define the module security and an enrollment policy for a learning module to control access to it and the enrollment process workflow.

There are three sections of the Define Enrollment Policy page:

- Enrollment Security

- Enrollment Policy

- Allow reopen

The Enrollment Security properties control which learners or organization members are allowed to enroll in or be enrolled in the learning module or program, and other enrollment related actions those participants can take.

The Enrollment Policy determines the enrollment processing workflow, such as whether the learner's manager must approve the enrollment. You can assign a single policy for the course as well as user group and organization specific policies, which can take precedence.

> ⓘ   Approval-based organization-level enrollment policies do not take precedence over the Default Policy if it is assigned to a learning module.

The Allow reopen property controls whether participants can re-open the course and download resources once it has been completed. They do not gain additional credit for completing the course again.

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

To define an enrollment policy for a learning module

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to define the enrollment policy for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Define Enrollment Policy** in the Module Properties tab. The Define Enrollment Policy page opens.

3. In the Enrollment Security section, check the boxes to control access to the course and other actions participants can take relating to enrollment. Select any organization or user constraints as required.

4. In the Enrollment Policy section, click the **browse** icon to select a different enrollment policy from the Default Policy, if required. The Enrollment Policy Editor opens in a new window, where you can select a policy or create a new one, if necessary.

   To select an enrollment policy from the Enrollment Policy Editor, click the policy in the Policies tab and then click the **Select** icon on the toolbar.

5. To assign a different enrollment policy for members of an organization, click the **Organization Group** option to select it, and click the **browse** icon to select the organization and the enrollment policy to assign to its members for this learning module. You can add different policies for different organizations.

6. If you added an enrollment policy for members of an organization, you can check the box to ensure that an enrollment policy that has been specified (in **Manage Center > Users > Organization Maintenance**)

for the participant's organization takes precedence over an approval-based policy specified for the course.

7. To assign a different enrollment policy for members of a user group, click the **User** option to select it, and click the **browse** icon to select the user group and the enrollment policy to assign to members of it for this learning module. You can add different policies for different user groups.

8. Select the check box to apply the Enrollment Policy if the learners select an active session or are transferred from a *Prompt User to Select Session* session.

9. In the Allow reopen section, select the check box to allow learners to re-open the course and download resources after they have completed it.

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

Additional Information

About Enrollment Policies

About the Default Enrollment Policy

Learning Module Enrollment Policy Properties

Organization-level Enrollment Policies

About the Default Enrollment Policy

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

Approval-based enrollment policies assigned to an organization do not override the Default Policy if it is assigned to a course.

Additional Information

About Enrollment Policies

Define an Enrollment Policy for a Learning Module

Learning Module Enrollment Policy Properties

Organization-level Enrollment Policies

Learning Module Enrollment Policy Properties

The table below describes the properties in the Define Enrollment Policy page in the Catalog Editor.

Table: Learning Module Enrollment Policy Properties

Property	Description
This module/program currently allows public access	Select this check box to allow public users (that is, users who are not logged into the LMS) to access this course.
Allow self-enrollment	Select this check box to allow learners to enroll in the course themselves.
Allow user to WITHDRAW	Select this check box to allow learners to withdraw their enrollments before starting the course.
Prompt user for reason for the withdrawal	If Allow user to WITHDRAW is selected, select this check box to prompt the learner for a reason for withdrawing their enrollment. To record the withdrawal and withdrawal reason in the learner's transcript record, the System Configuration options *Retain transcript records for user withdrawals or withdrawal equivalents* and *Record all withdrawals (except withdrawals performed using the group withdrawal function)* must be enabled. For more information, see About Course Withdrawal.
Allow user to mark Completed (Self-Asserted)	Select this check box to allow participants to mark their enrollments as completed.
Allow status changes to be made at any time (e.g., ignore standard business rules)	Select this check box to allow learners to change their enrollment at any time. For example, it allows participants to withdraw from the course after starting it. You do not need to select this check box to enable administrators to change a participant's enrollment status in the Catalog Editor.

Allow session transfer	Select this check box to allow learners to transfer onto an alternative session, either by themselves or by a reviewer. A Session Transfer button is available for the transcript if:
	• The transcript status is *Not Started*, *In Process*, or *Session Selection Needed*
	• There are alternative sessions satisfying all of the following requirements:
	• Status of *Active, Invitation only*, or *Prompt user to select session*
	• Start Date that is in the future or not specified
	• Current date within the Enrollment Period
	• The number of participants is less than the maximum
	A reviewer with the *Session Transfer* and *Review Records/ Transcript* Access Controls can also carry out Session Transfers regardless of this setting.
Disallow re-enrollment	Select this option to prevent learners from re-enrolling in the course when they have one or more previous enrollments with status *Completed, Completed Self-Asserted, Waiver/Exempt, Passed*, or *Failed*.
Allow re-enrollment after day(s)	Select this option to allow learners who have one or more previous enrollments with status *Completed, Completed Self-Asserted, Waiver/Exempt, Passed*, or *Failed* to re-enroll or be re-enrolled after a number of days you specify.
Select organization constraints	Use this property to restrict access to the module to specific organizations. Click to select the organizations that are allowed access to this module. Leave this box blank to allow all organizations to access it.
Assign user constraint(s)	Use this property to restrict access to the module to specific users. Click to select the users that are allowed access to this module.
Remove assigned user(s)	Click to remove the selected user from the list of users that are allowed access to this module.
Policy Name	Click the **browse** icon to select a different enrollment policy from the default, if required. Click the **trashcan** icon to revert to the Default Policy.

Organization / User Group	Use these options to specify different enrollment policies for members of individual organizations and user groups, which take precedence over the enrollment policy selected for the course in the Policy Name field.
	Click the **browse** icons to select the organization or user group and the enrollment policy to assign to members of it for this learning module.
	Click **Add organization policy** and **User Group Policy** to add different policies for different organizations and user groups.
Allow a configured organization enrollment policy to take precedence over this course policy	If you added an enrollment policy for members of an organization, you can check the box to ensure that an enrollment policy that has been specified (in **Manage Center > Users > Organization Maintenance**) for the learner's organization takes precedence.
Apply Enrollment Policy when transferring from a "Prompt User to Select Session" session	Select this check box to apply the Enrollment Policy if the learners are transferred from a *Prompt User to Select Session* session.
Allow reopen	Select this check box to allow learners to re-open the course and download resources after they have completed it. Learners do not gain additional credit for completing the course again.

Additional Information

Define an Enrollment Policy for a Learning Module

About Enrollment Policies

About the Default Enrollment Policy

Organization-level Enrollment Policies

About Course Withdrawal

Session Transfer

Organization–level Enrollment Policies

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

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

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

- Sales and Marketing

    - Sales

        - London

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

Organization-specific enrollment policies are defined in Organization Maintenance (**Manage Center > Users > Organization Maintenance**).

> ⓘ All courses must have an enrollment policy, which you configure in the Define Enrollment Policy module properties. The *DEFAULT POLICY* is not an approval-based policy—enrollments in a course with the *DEFAULT POLICY* do not require approval processing.
>
> An organization-level policy will be used for enrollment processing only when all of the following conditions are true:
>
> - The enrollment policy assigned to the course is approval-based (that is, not the *DEFAULT POLICY*).
>
> - An organization-level enrollment policy has been selected for the course.
>
> - The property *Allow a configured organization enrollment policy to take precedence over this course policy* box is checked.

Additional Information

Define an Enrollment Policy for a Learning Module

About Enrollment Policies

Learning Module Enrollment Policy Properties

About Course Withdrawal

In the enrollment policy defined for a course, you can check the options to allow learners to withdraw and, optionally, prompt them for a reason when they do so. If an enrolled learner decides to withdraw from the course, it may be useful for the organizer to know the reason for the withdrawal.

When defining an enrollment policy for a course, the following options determine when a learner or participant can withdraw their enrollment.

Table: Options for allowing learners or participants to withdraw the enrollment

Option	Description
Allow user to WITHDRAW	Allows learners to withdraw their enrollments when they are enrolled, and also when the enrollment is awaiting approval, before starting the course.
Allow status changes to be made at any time (for example, ignore standard business rules)	Allows learners to change their enrollment at any time. For example, it allows participants to withdraw from the course after starting it.

You can report on withdrawals from the Report Wizard by selecting the *Withdrawn User Details* report type.

Recording Withdrawals

To record withdrawals in the learner's transcript, the following System Configuration options must be enabled:

- *Retain transcript records for user withdrawals or withdrawal equivalents*

- *Record all withdrawals (except withdrawals performed using the group withdrawal function)*

Users who are waitlisted, or whose enrollment is pending approval, do not have a withdrawal record created as they are not yet considered enrolled.

Learners can withdraw from a session in the Knowledge Center, and can also be withdrawn by an administrator in the Catalog Editor's Participants page. The overall withdrawal logic is the same, and if the System Configuration settings listed above are enabled, the withdrawal is recorded in the learner's transcript.

The one exception is the Group Withdrawal function with the Override indicator set. This Catalog Editor function is intended to remove all traces of an enrollment, and so will not record the individual withdraw records for each user when the Override flag is checked.

Withdrawal from Programs

When a learner withdraws from a program, its status is set to *Withdrawn*. For learning modules or sessions within the program:

- If the learning module has been completed then its status does not change.

- If the module enrollment is shared between multiple programs then its status does not change.

- If the learning module is an enrollable course, and it has been started but not completed, its status is set to *Withdrawn*.

- In all other cases, the status for the learning module is set to *Withdrawn*.

Additional Information

Define an Enrollment Policy for a Learning Module

Learning Module Enrollment Policy Properties

About Changing Participant Overall Status

Group Enroll or Withdraw Learners in a Session

Configure Enrollment Restrictions for a Module

Enrollment restrictions enable course administrators to limit the number of enrollments in a course or session between two dates for one or more organizations. You can apply the restriction to specific job profiles. If enrollment is requested outside of the date range, the restrictions are not enforced.

Course administrators can configure multiple rules that target different organizations and job profiles so that the number of enrollments allowed for a particular course or session can differ between organizations.

For learning modules with one or more sessions, enrollment restrictions defined at the module level are applied to its sessions by default. For each session, you can choose to have no restrictions, keep the module level restrictions, or define different restrictions.

To configure an enrollment restriction for a learning module

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to configure the enrollment restriction for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Enrollment Restriction** in the Module Properties tab. The Enrollment Restriction page opens.

3. Select **Use Module Restriction** from the Restriction Process drop-down list.

4. Click the **calendar** icon to select the start date from which the restriction applies.

5. Click the **calendar** icon to select the end date after which the restriction no longer applies.

6. In the Rule(s) section click the **Select organization(s)** field label or box to select the organizations for which the number of enrollments will be restricted. The Organization Selection page opens in a new window. You must select at least one organization.

   To remove an organization from the list of selected organizations, select it in the list and click **Remove**.

7. In the Limit per Organization(s) field enter the number of enrollments allowed for the selected organizations.

8. To select the job profiles to which the restriction will apply, click the **Select Job Profile(s)** field label and select one or more job profiles in the Selector page.

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

10. If you want to add different enrollment limit to other organizations and, optionally, job profiles, click **Add Enrollment Restriction** and repeat steps 6 to 9.

Additional Information

Define an Enrollment Policy for a Learning Module

Configure Email Preferences for a Module

Whenever certain events occur relating to classroom or virtual classroom courses, emails can be sent to a range of LMS users, including the course participants, instructors and managers. A set of *System Default* email templates specify the email content, recipients, and in some cases, frequency of dispatch. For more information about the events that can trigger an email, see Email Preferences.

Instead of using the default email templates, administrators can select and configure custom email templates to send the emails at the module level and also for each session individually. Email preferences configured at the session level take precedence over those configured for the learning module. If no email preferences are configured for a session, the emails configured for the module are used.

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

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning module you want to configure email preferences for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Email Preferences Setup** in the Module Properties tab. The Email Preferences Setup page opens.

3. For each event you want to use a custom email template for, click the **browse** icon. The Email Template Editor opens in a new window.

4. Select the email template to use from the Templates tab and click the **Select** icon on the toolbar. Alternatively, you can create a new email template and select that.

5. Enter or select any additional configuration options for each email, such as Frequency and the number of days before or after the event.

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

Additional Information

Email Preferences

Configure Email Preferences for a Session

Email Preferences

Email Preferences can be configured at both the learning module and individual session level, where session-specific preferences take precedence over module level email preferences. The following table describes the events for which you can select an email template in the Email Preferences Setup properties for a module or session. For some events you can configure additional options, such as frequency and the number of days before or after the event to send the email. The email recipients are specified in the email templates.

These email preferences apply only to classroom or virtual classroom courses.

Table: Email Preferences Setup Events

Event	Description
Confirm enrollment	Select a customized email to be sent as a part of the workflow associated with a confirmed enrollment. This email is sent instead of the default generic confirmation email.
Module not yet accessed reminder	Configure an email to be sent whenever a learner has been enrolled in a course but has not yet started it.
Gentle completion reminder	Configure a gentle completion reminder message for learners who have not yet completed an assigned course. The initial email is sent based on the enrollment date of the course, and the selected email template should indicate to the learner a specific deadline, if one applies.
Escalation of completion reminder	Configure an escalated completion reminder message for learners who have not yet completed an assigned course. The initial email is sent based on the enrollment date of the course, and the selected email template should indicate to the user a specific deadline, if one applies.
Gentle deadline reminder	Configure a gentle deadline reminder message for users who have not yet completed an assigned course. The initial email is sent based on the impending deadline date of the course.
Session waiting reminder	While the number of enrolled people is below the minimum class size, an email will be sent to those who register explaining that more enrollments are required before the course is confirmed. Once the minimum class size is reached, the enrolled users will be sent a confirmation email. If the minimum class size is not reached by the enrollment deadline, the class will be cancelled and the enrolled users will receive a cancellation notification.
Start of session reminder	Select an email to be sent a number of days before the class starts.
Session completion notification	Select an email to be sent to learners when they have completed a session (that is, when the status is set to *Completed*).
Session finish notification	Select an email to be sent to learners a number of days after the session is marked as completed (or for a classroom session, after the end date).

Enroll user in waitlist	Select an email to be sent if a learner on the waitlist is enrolled when someone else withdraws
Coupon distribution notification	Select an email to be sent when the course coupon is assigned to a reseller. The email will be sent to the reseller in addition to the recipients that are targeted in the selected email template.
Dropped from waitlist notification	Select an email to be sent when a user drops from the waitlist (that is, their status changes from *Waitlist* to *Dropped*). Note that you cannot use this for learning programs.
Task Complete Reminder	Select an email to be sent to the users who can mark a Task learning module as completed.
Submitted homework notification	Select an email to be sent (typically to the instructor) whenever a participant uploads a file to the Submitted Homework file share area in the Knowledge Center.
Marked/reviewed homework notification	Select an email to be sent (typically to the participant) whenever an instructor uploads a marked/reviewed homework file to the Marked/Reviewed Homework file share area in the Knowledge Center.
Session fail notification	Select an email to be sent to learners who have failed an assigned course.
No-show notification	Select an email to be sent if a participant does not attend a classroom session (that is, when the instructor or administrator update's the participant's status to *No Show*).
Post-session reminder for instructors/administrators	Configure a reminder message to be sent to the instructor or a named administrator to remind them to log participant attendance and completion of the session. The recipients are defined in the email template. The following recipients are supported: • Course specific instructors • Default system approver • Default system administrator • Specific user • External email The initial email is based on the session end date. For a frequency other than Once, the reminder will be sent as long as there are participants with open transcripts (that is, not in a final state, such as Completed).

Additional Information

[Configure Email Preferences](#)

About Session Email Notifications

About the Knowledge Center

The Knowledge Center provides learners with information about the courses they are enrolled in. You can configure the Knowledge Center to give learners access to various LMS features, including:

- Launching and withdrawing from the course

- Course reference materials

- Discussion forums

- A course notepad

- The file sharing area

- Email communication with the instructor

Instructors can use the Knowledge Center to access instructor resources, communicate with learners via email and forums, and upload files to share with learners, such as reviewed homework.

The Knowledge Center settings are configured universally for all new modules in the System Configuration settings. As a course administrator you can configure the Knowledge Center for individual modules in the Catalog Editor. The settings you specify in the Catalog Editor override the System Configuration settings.

To configure the Knowledge Center for a learning module, go to **Manage Center > Learning > Learning Modules**, click the name of the module, then select **Setup Options**.

Additional Information

Configure the Knowledge Center

Knowledge Center Settings

Configure the Knowledge Center

Course administrators can configure the Knowledge Center for individual learning modules in the Catalog Editor. These settings override the Knowledge Center settings in System Configuration.

To configure the Knowledge Center

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to configure the Knowledge Center for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Setup Options** in the Module Properties tab. The Knowledge Center Options page opens.

3. The Knowledge Center may or may not be enabled by default for learning modules in the System Configuration settings. If it is not enabled, you can check the box to enable the it for the learning module.

4. Select one of the options to specify whether an image is shown in the Knowledge Center. To use an image different from the catalog image, select **Define an image** and click the **browse** icon to select an image from the Repository Manager.

5. Select the check boxes to change the default settings to specify which features are shown in the Knowledge Center.

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

Additional Information

About the Knowledge Center

Knowledge Center Settings

Knowledge Center Settings

The table below lists the Knowledge Center settings that course administrators can configure in the Catalog Editor.

Table: Catalog Editor Knowledge Center Settings

Setting	Description
Allow module launches in KC	Specifies whether the course can be launched from the Knowledge Center. This setting overrides the *Module Launches* option in System Configuration.
Course link always launches the KC instead of the course	If enabled, the course will be displayed with a *Launch* button on the Current Learning Modules page and Enrollments (Current Learning Format) widget instead of the *Knowledge Center* link. Clicking Launch opens the Knowledge Center. Note that if the System Configuration setting, *Module Link Launches Knowledge Center*, is enabled, this setting cannot be disabled in the Catalog Editor for individual modules.
AREA: Show assessment workflow area	Specifies whether the Assessment Workflow area is enabled. Learners and instructors can see and launch pre- and post-course assessments from this area of the Knowledge Center.
AREA: Show certification area	Specifies whether the Certification area is enabled. If there are any certifications assigned to the course, information about them is shown in this area of the Knowledge Center.
AREA: Show contact list area	Specifies whether the Contact Group Members area is enabled. In this area learners and instructors can view the profiles of other learners enrolled in the course, send them emails, or remove themselves from the contact list.
AREA: Show course summary area	This option has no effect. The course summary is always shown.
AREA: Show evaluation area	Specifies whether the Evaluation area is enabled.
AREA: Show forum area	Specifies whether the Forum area is enabled. This area enables learners and instructors to access the forum category or forum assigned to the course in Define Module Properties.
AREA: Show instructor list area	Specifies whether the Contact Group Members area is enabled. In this area learners can email the course instructor(s).
AREA: Show news area	Specifies whether the All News area is enabled. In this area learners and instructors can see news articles that have been configured to be shown in the Knowledge Center for the course.

AREA: Show notepad area	Specifies whether the Personal Notebook area is enabled. Learners and instructors can make personal notes for the course in a separate page and print them.
AREA: Show peer comments area	Specifies whether the Peer Comments area is enabled. Learners can rate the course (out of five stars) and leave a comment or review.
AREA: Show references area	Specifies whether the Reference Resources area is enabled. Learners and instructors can access references configured for the course from this area.
AREA: Show status change area	Specifies whether the action button to enable learners to change their enrollment status is shown. For example, when this area is enabled, if learners are allowed to withdraw their enrollment, the Withdraw Enrollment button is shown.
AREA: Show exam area	Specifies whether Exams assigned to the course are shown in the Reference Resources area.
AREA: Show About Me for the instructor	Specifies whether to enable the the link to the About Me information for each instructor in the Instructor Area.
AREA: Show reference share area for instructors	Specifies whether the list of references for instructors is shown in the Reference Resources area. Only instructors can see instructor resources.
AREA: Show file share area	Specifies whether the File Share area is enabled. Learners and instructors can upload files to share with each other in this area, including homework.
AREA: Show homework drop box	Specifies whether the Submitted Homework file list is enabled in the File Share area. When enabled, instructors can view submitted homework files.
AREA: Show marked/ reviewed homework	Specifies whether the Marked/reviewed Homework list is enabled in the File Share area. When enabled, learners can view their homework files that have been marked by the instructor.
AREA: Show transcript area	Specifies whether the Records/Transcript area is enabled. Learners view their current learning record for the course and access the transcript history in this area.
AREA: Show quick evaluation area	Specifies whether the Quick Evaluation area is enabled.
AREA: Show Module Attributes	Specifies whether module attributes are shown in the Overview area. Note that you must also check the Knowledge Center box in the Display Area Settings in the Module Attribute definition.
For Program Module, sort sub-modules by	Required/Elective: the sub-modules are shown in two separate sections, Required Modules and Elective Modules. Defined Order: the sub-modules are shown in one section, in the order defined in the session properties. This is the default setting.

Additional Information

About the Knowledge Center

Configure the Knowledge Center

Define Launch Properties

Launch properties define how courses delivered online are launched and tracked. There are different properties for each type of launch interface, and selecting a launch interface enables you to enter the required and optional properties.

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

To define the launch properties

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to define the launch properties for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Define Launch Properties** in the Module Properties tab. The Web Launch Interface Specifications page opens.

3. Select the launch interface from the drop-down list. The page may refresh to show the launch properties for the interface you select.

4. Optionally, enter the height and width of the course launch window. If you leave them blank, the default settings defined in System Configuration are used.

5. Enter the launch settings for the selected launch interface.

6. Select the IE compatibility mode from the drop-down list.

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

Additional Information

Launch Interface Properties

Launch Interface Properties

This page describes the properties for the default set of launch interfaces in the LMS.

Resource

This is the recommended Launch Interface setting for most courses, including SCORM and AICC courses. It is the default setting for courses imported using any of the Import Content Package, Import AICC Course Structure or Import Resource wizards.

This launch interface supports any of the following content types, provided the Run-time Environment is configured appropriately:

- Generic web content that does not support a specific communication or tracking mechanism such as AICC HACP or the SCORM JavaScript API.

- Courses that use the SCORM 1.2 or SCORM 2004 communication and tracking mechanism (the JavaScript API).

- Courses that use either of the AICC communication and tracking mechanisms, that is, the HTTP AICC CMI Protocol (HACP) or the JavaScript API.

- Courses created from exams.

Table: Resource Launch Properties

Property	Description
Attempts Allowed	Select the number of attempts a learner can have to achieve a passing score and complete the course. You can select 1 to 10, or unlimited attempts. For a given learner's enrollment, the number of attempts allowed will be number set at the time of enrollment. This number can be reset for the learner upon publishing new revisions or by explicitly granting additional attempts. The number of attempts taken and the number allowed are shown in Current Learning Modules and the Knowledge Center.
Course Scoring Method	If the learner is allowed more than one attempt to complete the course with a passing score, select the course scoring method. You can select their highest, average, first or last score. The scoring method applies only to courses, not to exams. It is captured for a transcript during enrollment and may only be reset upon publishing new revisions. While the resulting score will be displayed on a transcript, it will not affect the overall status of the transcript.

| Course should be completed | Select whether the learner's transcript status for the course is updated to *Completed* automatically when the learner completes the course with a passing score, or whether the learner must manually mark the course as completed. Allowing the learner to mark the course as completed means they can try to improve on a previously successful attempt.

The course completion method will be captured for a transcript during enrollment and may only be reset upon publishing new revisions. |
|---|---|
| Run-Time Environment | Select the run-time environment to specify how the LMS communicates with the resource. |
| Web Address or Embedded Content | Enter the URL of the course launch page. It can be a relative or absolute path, and can contain parameters. Alternatively, click **Select** to open the Repository Manager, where you can select a file. |
| Exam ID | If the resource is an exam, click the **browse** icon to select the exam. This option is enabled only when the Run-Time Environment is set to *This resource is an exam created using the exam editor*. |
| Optional Properties | Enter or select the optional properties supported by the resource. |
| Download | Check or select the options to enable mobile devices to download the resource. |

Rustici Engine

You can migrate courses that use the native LMS SCORM engine to Rustici Engine. Only to SCORM, AICC and xAPI courses imported via the Import Content Package page can be migrated. It is not possible to migrate courses from Rustici Engine back to the native LMS SCORM engine.

For more information about importing and migrating courses and revisions to Rustici Engine, see About Rustici Engine.

Adobe Connect

Adobe Connect is a web conferencing and real-time collaboration software. You can use Adobe Connect for virtual classroom based courses. Your organization must have an Adobe Connect account, set up (see Configure a Virtual Classroom Account). The LMS supports Adobe Connect Learning (Live Virtual Classrooms) and Adobe Connect Meetings Licenses.

Table: Adobe Connect Launch Properties

Property	Description
Adobe Account	Select the Adobe Connect account for the virtual classroom module.
Password	Enter the password for the Adobe Connect account.
Launch URL	Enter the URL of the course launch page. It can be a relative or absolute path, and can contain parameters.

AICC Assignable Unit

This interface is for courses that support the HTTP AICC CMI Protocol (HACP) for communication and tracking.

> ⓘ This is a legacy interface, provided mainly for backward-compatibility. For new courses, PeopleFluent recommends using the *Resource* launch interface with the Run-time Environment set to *This resource communicates using an HTTP-based protocol (appropriate for courses that support the AICC HACP Binding)*.

Table: AICC Assignable Unit Launch Properties

Property	Description
Attempts Allowed	Select the number of attempts a learner can have to achieve a passing score and complete the course. You can select 1 to 10, or unlimited attempts. For a given learner's enrollment, the number of attempts allowed will be number set at the time of enrollment. This number can be reset for the learner upon publishing new revisions or by explicitly granting additional attempts. The number of attempts taken and the number allowed are shown in Current Learning Modules and the Knowledge Center.
Course Scoring Method	If the learner is allowed more than one attempt to complete the course with a passing score, select the course scoring method. You can select their highest, average, first or last score. The scoring method applies only to courses, not to exams. It is captured for a transcript during enrollment and may only be reset upon publishing new revisions. While the resulting score will be displayed on a transcript, it will not affect the overall status of the transcript.
Course should be completed	Select whether the learner's transcript status for the course is updated to *Completed* automatically when the learner completes the course with a passing score, or whether the learner must manually mark the course as completed. Allowing the learner to mark the course as completed means they can try to improve on a previously successful attempt. The course completion method will be captured for a transcript during enrollment and may only be reset upon publishing new revisions.
Web Address or Embedded Content	Enter the URL of the course launch page. It can be a relative or absolute path, and can contain parameters.
Core Vendor and Optional Data	These properties are for optional AICC data sent to the course in response to a GetParam request. Only set these options if you have a specific need for your course.

Email Launcher

This interface sends an email to the learner, which contains the information they need to launch the course.

Table: Email Launcher Properties

Property	Description
E-mail Message Name	Select the email template to use for the email.
Subject/message read only for learner	Check this box to ensure the email subject and message content are read-only for the learner.

Generic Web Launch

This is a legacy interface for courses that do not support a specific communication/tracking mechanism.

> (i) This is a legacy interface, provided mainly for backward-compatibility. For new courses, PeopleFluent recommends using the *Resource* launch interface with the Run-time Environment set to *This resource has no built-in support for run-time communication*.

Table: Generic Web Launch Properties

Property	Description
Allow direct launch	Check this box to enable learners to launch the course directly from the catalog Course Details. This bypasses enrollment processing and does not update the learner's transcript.
Web Address or Embedded Content	Enter the URL of the launch page when the participant starts this learning module. Valid HTTP(S) addresses can include parameters (for example: nd/fresco/courses/page1.html?UID=userabc).

getAbstract Proxied Authentication

This is used to create an Online Module that provides direct access to the getAbstract service for business book summaries. In order to use this launch interface, your organization must have an account with getAbstract.

Table: getAbstract Proxied Authentication Launcher Properties

Property	Description
"U"Value	Enter the value provided by getAbstract for your account.

Global English

This interface is used to create an online course that provides direct access to the GlobalEnglish service for online English instruction. In order to use this launch interface, your organization must have an account with GlobalEnglish.

Table: getAbstract Proxied Authentication Launcher Properties

Property	Description
Keycode	Enter the value provided by GlobalEnglish for your account.

NETg Cookie-based Tracking

This is a legacy interface for NETg courses that support NETg's proprietary cookie-based tracking mechanism.

> ⓘ   This interface is provided mainly for backward-compatibility. The latest NETg course players support SCORM and AICC communication and tracking, so PeopleFluent recommends that customers use the SCORM or AICC versions, and use the Import Content Package or Import AICC Course Structure wizard respectively to import the courses.

Table: NETg Cookie-based Tracking Launcher Properties

Property	Description
Web Address or Embedded Content	Enter the URL of the course launch page. It can be a relative or absolute path, and can contain parameters. Alternatively, click **Select** to open the Repository Manager, where you can select a file.
Passing score by URL parameters?	Select whether to pass the score in the URL parameters. Usually this is set to No for NETg courses.
Location of the script file	Select whether the location of the script file is the same as the starting page (applicable to version 1 and SimBuilder 01) or a level up from the starting page (applicable to SkillBuilder and SkillBuilder DX).

NETg Learning Proxied Authentication

This interface is used to create an Online Module that provides direct access to the O'Reilly Safari Books Online e-reference library. To use this, your organization must have an account with Safari Books Online.

Table: NETg Learning Proxied Authentication Launcher Properties

Property	Description
Public Key	Enter the public key provided by O'Reilly.
Private Key	Enter the private key provided by O'Reilly.
Destination	Select the Safari Books destination from the drop-down list.

Safari MD5 Login Authentication

This interface is used to create an Online Module that provides direct access to O'Reilly Safari books. To use this, your organization must have an account with Safari Books Online.

Enter or select the properties based on consultation with Safari bookstore.

Skillsoft Net Download

The Skillsoft Net Download interface is used for Skillsoft courses and allows learners to download the courses and play them offline using the Skillsoft Course Manager (SCM) desktop application.

Table: Skillsoft Net Download Launcher Properties

Property	Description
Web Address	Enter the URL for the folder where your Skillsoft courses are installed.The Address is used by the Skillsoft Course Manager to locate the Skillsoft courses on the web server, so it can launch them. This can be a relative or absolute URL, up to the *player* folder in your Skillsoft install path.
Course Type	Select the course type.

Time Tracking HTML

This interface is used for courses that do not support a specific communication or tracking mechanism, where you need the LMS to record the time that the learner spent viewing the course. The LMS displays a timer that gives the learner immediate feedback on how long they have spent in the course.

> ⓘ This is a legacy interface, provided mainly for backward-compatibility. For new courses, PeopleFluent recommends using the *Resource* launch interface with the Run-time Environment set to *This resource has no built-in support for run-time communication*. The LMS automatically records the time when the learner indicates that the course is completed when they click the *Mark As Completed* button.

Additional Information

[Define Launch Properties](#)

Generate a Proxied Launch Package

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

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

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

To generate a proxied launch package

1. Go to **Manage Center > System > System Configuration**.

2. Add the hostname or IP address of the learning system from which the course will be launched to the *Trusted sites for proxied course launches* setting, if it is not already present.

3. Go to **Manage Center > Learning > Learning Modules** , and click the name of the module you want to generate a proxied launch package for. The Catalog Editor opens at the Define Module Properties page.

4. Click **Proxied Launch Package** in the Module Properties tab. The Proxied Launch Package page opens.

5. Select the character encoding for the course content from the **Encoding** drop-down list.

6. Click **Generate package**. The AICC package file is downloaded to your PC as a ZIP file.

About Learning Module Sessions

Sessions define an instance of a learning module. They are used to capture course information unique to a particular training session or that changes over time. For example, for classroom-based courses each session may have its own date, venue, instructor and participants. Sessions are also used to assign learning modules to programs.

At least one session must be defined for any module type that requires enrollment processing (except Just-in-Time learning modules, which do not have sessions), such as online and classroom-based courses. With the exception of classroom-based modules and programs, when you create a new learning module, an active session is also created. Multiple sessions can be scheduled for the same time provided that there is no conflicting resource use.

Sessions have their own properties, which you configure for a particular instance of the course. Some session properties can inherit values from the learning module, so you don't have to configure them again. Alternatively, they can be configured individually for each session and take precedence over the module-level property.

To configure a learning module and its sessions, your user role must have the required access control to the LMS features associated with course administration, such as the Catalog Editor. The required permissions are available to users with the *Course Administrator* System Role.

Sessions can be created and configured, along with modules, using the Course CSV Loader.

> To create multiple sessions in the LMS more efficiently, you can clone a session multiple times and update only the properties with different values for each cloned session.

Session availability for enrollment is defined by its Event Status. For more information, see Session Properties.

Sessions can be deleted from the LMS if there are no users enrolled in them.

Additional Information

About Session Properties

About Session Utilities

Create a Session

Clone a Session

About the Course CSV Loader

About Learning Modules

About Learning Programs

Create a Session

Administrators can create sessions for a learning module individually in the LMS application or import one or more sessions via the Course CSV Loader.

To create a session

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning module you want to create a session for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties**.

3. Click **Add Session** in the Session Properties tab. The Edit Session Properties page opens for the new session. The Session Code is pre-populated according to the format specified in the *Session Code Generator Format* System Configuration setting.

4. Enter the session properties as required.

5. Click the **Save** icon on the toolbar before clicking another step in the Session Properties tab.

Additional Information

About Session Properties

Session Properties

About the Course CSV Loader

Clone a Session

Clone a Session

Course administrators can clone a session just once or create multiple cloned sessions, repeating on a regular basis by specifying a recurrence frequency, so that the LMS will automatically create and set dates for sessions to repeat daily, weekly, or monthly. This is useful for modules like new starter induction courses that might be held every month.

For recurring sessions, you can choose the event status and automatically adjust the enrollment window, and homework and completion deadline dates. For example, for a monthly recurring session, those dates can be advanced by one month for each subsequent recurrence to keep them in line with each session.

If you do not want cloned sessions to appear in the Course Calendar or Course Details immediately, you can select the *Pending* Event Status. The default event status for new and cloned sessions is defined by the *Default Event/Session Status on Session Creation* System Configuration setting.

When you clone a session, the original session remains open in the Catalog Editor. To edit the new session, you must select it in the Session Properties tab.

To clone a session

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning module you want to clone a session for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session to clone.

3. Select a session from the drop-down list and click **Go**.

4. Click **Clone** in the Session Properties tab. The Clone Session page opens in the Catalog Editor.

5. Select the Event Status for the cloned session or repeated sessions.

6. To create regularly repeating sessions, select the **Repeat** check box and select the recurrence frequency from the drop-down list.

7. Select or clear the check boxes for automatic date adjustment as required.

8. Select or enter a date and time up to which recurring sessions will be created.

9. Click **Clone**. The Catalog Editor returns to the session properties for the original (cloned) session.

10. To edit a newly created session, select it from the drop-down list in the Session Properties tab. You may need to select its event status to see it in the list.

Additional Information

About Learning Module Sessions

About Session Properties

Session Properties

About Session Properties

Sessions define an instance of a learning module. They are used to capture course information unique to a particular training session or that changes over time. For example, for classroom-based courses each session may have its own date, venue, instructor and participants.

Some session properties can be configured for all enrollable learning types (except Just-in-Time learning modules, which do not have sessions), while others are specific to classroom or program learning types. Properties are grouped into separate pages in the Catalog Editor relating to different areas of session configuration.

Click the links below to learn more about the session properties configured in the Catalog Editor.

Session Setup:

- Edit Session

- Session Class Schedule

- Assign Module

- Enrollment Restriction

- Cost Information

- References

- Participants

- Session Approver

- Instructors

- Email Preferences

- Cost Accounting Information

- Checklist

- Course Coupon

- Resource Reservation

- Session Security

- Associated Programs

- Tin Can API

Additional Information

About Learning Types

Session Properties

The tables below describe the session properties which you may need to configure for various learning types. Related session properties are grouped under a descriptive heading.

To access session properties

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning module you want to access session properties for. The Catalog Editor opens at the Define Module Properties page.

2. Click the **Session Properties** tab.

3. Select a session from the drop-down list or click **Add Session**.

> ⓘ   The properties you see depend on the learning type of the module.

Table: Required Event Attributes

Property	Description
Session Title	Enter a session title for this instance of the course. The title is shown in the Course Details and could indicate something unique or descriptive about the session, such as the term or semester and year (although the session dates are also listed in the Course Details).
Session Code	This defaults to the template format defined in the *Session Code Generator Format* System Configuration setting. Using this setting enables you to create sessions with codes of a standard format, with a static prefix. For example, SESSION-0000, where 0000 is the next available unique four-digit number. This is a mandatory field.
Description	Enter a description for the session. This is shown in the Course Details.

Event Status	When you create a new session, the Event Status defaults to the status selected in the *Default Event/Session Status on Session Creation* System Configuration setting. You can change the default Event Status. Other event statuses are: • *Active*—The session is available for enrollment as soon as it is saved. • *Pending*—Use this status when you are preparing a session which is not yet available for enrollment. • *Completed*—The session has finished. • *Closed*—The session is no longer available for enrollment. • *Cancelled*—The session was scheduled but has been cancelled. • *Invitation Only*—Learners can not self-enroll in the session and must be enrolled by an administrator. • *Prompt User to Select Session*—Use this status if the session is used as a placeholder for assigning a course to learners. After it has been assigned, learners and reviewers can select an *Active* session. • *Retired*—The course has been retired and any currently enrolled online session can no longer be launched. • *Ended*—The session is no longer available for self-enrollment. Classroom training sessions can be configured to automatically switch to this status once their end date has passed. For more information about setting the Event Status, and additional options for prompting the user to select a session, see Guidelines for Setting the Event Status.
User(s) who is/are allowed to select the session	When the Event Status is set to *Prompt User to Select Session*, you can choose whether that can be the participant, the reviewer or both.
Make "Prompt user to select session" available for self-enrollment	This property is available when the Event Status is set to *Prompt User to Select Session*. If checked, a placeholder session will be available for enrollment by learners or by reviewers on their behalf. The session will also be shown in the catalog for self-enrollment.
Show session selection reminder	This property is available when the Event Status is set to *Prompt User to Select Session*. If checked, the LMS will show a session selection reminder to the participant at each login.

Change transcript status of enrolled users correspondingly, for changing the event status to Completed, Cancelled or Retired or changing from Prompt User to Select Session to another status	If this check box is selected, the status on the transcripts of the enrolled learners are updated according to changes in event status.
Delivery Language	Sessions can be delivered in a specific language you select from the list. For learning modules with more than one session, such as classroom-based courses available in different locations, you can define the learning module as multi-language and specify the delivery language for each session. The languages available are determined by the languages purchased by your organization.
Select organization constraint(s)	Leave this box blank to make the session visible to all organizations, or click this field name to select the organizations whose members can see the session in the Catalog Browser and Catalog Search results.
Instructor Contact Email	The instructor's contact email address. This takes precedence over an email address specified in the instructor's profile.
Course Specific Approver #1/#2	For enrollment policy steps that require a course session-specific approver, you can select an individual here to whom the enrollment approval request will be sent.
Comments	You can add comments about the session in this box.
Enrollment Limits	You can specify the minimum and maximum number of enrollments for the session. The maximum can be based on the capacity of the training facility, which is defined in the # of Seats field in the Facilities page. For more information about basing enrollment limits on the training facility, see Enrollment Limits Based on Facility
Reserve seats for learner enrollments pending approval	If checked, Learners with a Pending Approval status will have a seat reserved at the time of enrollment as long as the limits have not been reached according to the first come, first served logic. To check this box by default for all sessions, check the *Default Reserve seats for learner enrollments pending approval* System Configuration setting.
Total Enrollment #	Shows the total number of enrollments in the session.
Cannot withdraw/transfer within	You can specify the number of days before the starting date of the session up to which enrolled learners can withdraw their enrollment. Once within this number of days before the start date, they cannot withdraw. You can use this setting to give waitlisted learners who are automatically upgraded enough time to prepare for the session.

Waitlist Handling	Select one of the following options: • Automatic Upgrade • Manual (Administrator) Upgrade • Waitlist all learners • No waitlist For more information, see About Waitlist Handling.
Dropped from waitlist handling: Transfer users dropped from waitlist to the following session	Check this box to transfer learners with a Dropped from Waitlist status to the session selected from the drop-down list during manual or automatic waitlist clean-up tasks. Note that the selected session must have one of the following event statuses: • Active • Pending • Invitation Only • Prompt User to Select Session
Credits	Specify the credits for the session.
Institution	Specify the institution that provides the training.
Enrollment Begin Date and Enrollment Deadline	To specify a window of time during which learners can enroll in the session, select the begin and deadline dates and times.
Due Date of Homework	Specify the due date for homework handed out in the session.

Table: Module Completion Deadlines

Property	Description
On enrollment, calculate deadline as follows	Select an option to calculate the deadline to complete the session: • No deadline, these will be set manually per learner if necessary. • [Value] Days from Enrollment (0 implies unlimited)—Specify the number of days from the enrollment allowed to complete the module. • Date Specific Deadline—Specify the module completion deadline. ⓘ New deadline settings must be explicitly applied to the selected learners in order for the new deadline to be reflected in their transcripts.

Once the deadline against a transcript has passed	Select an option: • Do nothing, the deadline was just for reference. • Set transcript to *Deadline Expired* and block learner from launching the course. • Block learner from launching other courses until they complete this course.
View Participant Deadlines	View the list of participant status and deadlines. Participant deadlines are calculated on enrollment, thus changing the deadline alone will not affect the deadlines for existing course participants. A change in the course completion deadlines can be applied to learner transcripts with the following statuses: • Waitlisted • Not Started • In Process • Pending Approval

Table: Collaboration Tools

Property	Description
Forum	Link a Forum Category or Single Forum to the session so that the learners and instructors can access the session level forum or category through the Knowledge Center.

Additional Session Attributes

Assign values to any configured session attributes.

Table: Workflow Assignments

Property	Description
Select a workflow template	Assign a workflow template to the session. Workflow Templates are defined in the Assessment Workflow Manager.
Disable workflow assignment for this session	If selected, all workflow will be ignored for the enrollment of this session. When a learner enrolls in the course, the LMS looks for the correct workflow for the enrollment and assigns the exam or evaluation in the workflow to them. It will be accessible to learners from the Overview and Assessment Workflow in the Knowledge Center.

Additional Information

Guidelines for Setting the Event Status

About Facilities

Enrollment Limits Based on Facility

About Waitlist Handling

About Assessment Workflow Templates

Guidelines for Setting the Event Status

When the LMS presents course schedule options to learners, the event status is used to determine which sessions to show the user.

The event status is specific to the session and is independent of the final overall status recorded in the participant's training history record. However, changing the event status for a session in which learners are currently enrolled may affect their training record status.

Group enrollment allows you to override the business logic restrictions of a specific status as long as the *Override?* check box is selected on the Group Enrollment page.

> ⓘ Changing the event status of single-session modules (that is, online equivalent learning types) to Completed, Retired or Cancelled automatically clears the module's *Visibility: Show in Catalog* check box so the session will no longer be shown in the course catalog or catalog search.
>
> If the *Change transcript status of enrolled users correspondingly* setting is enabled, the overall status for learners enrolled in the session will be changed correspondingly.
>
> If the *Change transcript status of enrolled users correspondingly* setting is disabled, only the course status and visibility in the catalog will be changed. Enrolled learners' overall status for the session will not be changed.

About the *Prompt User to Select Session* Event Status

This event status is intended especially for classroom modules so that a session can be used as a placeholder to enable a course to be assigned to a user, even if it is not yet clear which actual session the user will attend. It requires the participant or reviewer to select the specific session from among the *Active* sessions for the course. You can specify who can select the session when configuring the *Prompt User to Select Session* properties. It can be participant only, reviewer only or both participant and reviewer. If the *Show session selection reminder* check box is selected, the LMS shows a session selection reminder to the participant each time they login.

This event status works with group enroll and auto-enroll targets. The default setting doesn't allow a user to self-enroll into in a classroom session with this status, although a program session containing such a class can be self-enrolled. If the *Make "Prompt user to select session" available for self-enrollment* check box is selected, the session is also shown in the catalog for self-enrollment.

When used with a program session, you can create a placeholder session for assignment that avoids the inconvenience of setting up a number of program sessions with a different classroom dates.

Other session properties, such as start date or venue, are irrelevant for an event with this status, as they are never used.

Additional Information

About Session Properties

Group Enroll or Withdraw Learners in a Session

Enrollment Limits Based on Facility

You can base the limit for the maximum number of enrollments in a physical class on the capacity of the training facility hosting it. This enrollment limit also takes into consideration other enrollments that might have taken place for other courses using the same facility at the same time. If a facility's maximum number of seats is set to zero, this is interpreted as not having a limit.

Seats Remaining Calculation Logic

Suppose a course session uses the dynamic enrollment limit (that is, based on facility) and all its separate classes are held at one facility. If there are other sessions sharing the same facility at the same time, the seats remaining for this session can be described by the following formula:

```
Remaining seats = facility capacity - max { total number of enrollments in a
particular period of all the sessions' class schedules }
```

However, if the course session's classes are held in different facilities then the calculation becomes:

```
remaining seats = min {
  facility capacity - max { total number of enrollments in a particular period of
the sessions' class schedules }
} of all facilities involved in the session
```

This is more easily demonstrated via some examples.

Scenario A

Facility *F1* has only 30 seats.

Sessions *S1*, *S2* and *S3* have classes all located at *F1* on the same day, with their schedules overlapping. Suppose that each session has 10 learners enrolled.

The following diagrams show the classes' start and end times and how they overlap.

Example 1

S1 (10:00-11:30)   ———

S2 (09:00-11:00)   ————

S3 (10:45-12:00)   ——

In this example, since there is a period in time when all three classes are in the same facility, all 30 seats in the facility have effectively been used up and no more enrollment can be accepted for any of the three sessions.

Example 2

S1 (10:00-11:30)   ———

S2 (09:00-11:00)   ————

S3 (11:15-12:30)   ——

In this example, at any point in time, there is at most 20 learners in the facility, therefore, the number of seats which remain available for enrollment is 10.

Scenario B

Consider the more complicated scenario where one session has two classes held at different facilities:

- Facility *F1* has 30 seats. Facility *F2* also has 30 seats.

- Sessions *S1*, *S2* and *S3* each have a class located at *F1* on Day 1, with their schedules overlapping.

- Each session has 10 learners enrolled.

- Session *S1* has an additional class located at *F2* on Day 2.

The following diagrams show the classes' start and end times and how they overlap.

At facility *F1* on Day 1:

S1 (10:00-11:30)   ———

S2 (09:00-11:00)   ————

S3 (11:15-12:30)   ——
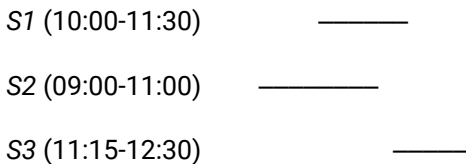
At facility *F2* on Day 2:

S1 (10:00-11:30)   ———
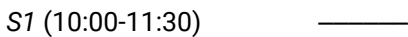
In this example, although facility *F2* has 30 seats available for the single session on Day 2, there are only 10 free seats available for enrollment at any time on day 1 for sessions *S1* and *S2*. Therefore, the maximum number of seats remaining for enrollment in session *S1* is 10, because the participants will be attending both days.

Scenario C

Facility *F1* has 30 seats.

Sessions *S1*, *S2* and *S3* have classes located at *F1* on Day 1, with their schedules overlapping. Each session has 10 learners enrolled.

In addition, *S1* has another class located at *F1* on Day 2, and so does session *S4*, which has 20 learners enrolled.

At facility *F1* on Day 1:

S1 (10:00-11:30)   ———

S2 (09:00-11:00)   ————

S3 (11:15-12:30)   ——
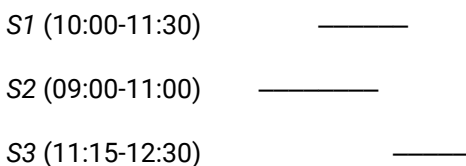
At facility *F1* on Day 2:

S1 (10:00-11:30)   ———

S4 (09:00-11:00)   =======
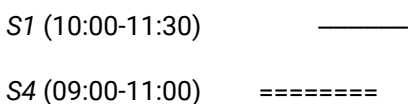
In this example, since no more enrollment is possible for *S1* on Day 2, it is not possible to enroll another learner for *S1* even though 10 seats are available on Day 1.

> ⓘ The timezone set at the session level is taken into consideration when working out class schedule overlap. It must be ensured that this is set appropriately for the facility in question.

LMS Functions that Use Seats Remaining Calculations

The seat availability logic is used by the following LMS features:

- The available number of seats for enrollment, as displayed in the LMS or retrieved via the API.

- The enrollment process

- Waitlist handling

In the example in Scenario C, if waitlisting is enabled with automatic upgrade, and one of the enrolled learners decides to withdraw from session S4, then it is possible for a waitlisted learner of either S1 or S4 to become enrolled. The order upgrade precedence depends on who joined the waitlist first.

Scenario D: Waitlist Upgrade

Facility *F1* has 5 seats.

Session *SA* has a fixed enrollment limit of *2* while session *SB* has a dynamic enrollment limit.

Their classes are both located at *F1* at the same time and both sessions have the waitlist option set to *Automatic Upgrade*.

Two learners are enrolled in session *SA* and three learners are enrolled in session *SB*. Further enrollment attempts will result in learners being waitlisted.

The following examples show how the order in which learners are waitlisted can affect the auto-upgrade result.

Example 1

Learner *B* attempts to enroll onto session *SB* and is waitlisted.

Learner *A* attempts to enroll onto session *SA* and is waitlisted.

Now if a learner withdraws from session *SA*, both learners *A* and *B* will be upgraded and become enrolled onto sessions *SA* and *SB* respectively. This is because the upgrade logic considers all waitlisted users in both sessions *SA* and *SB* since they are located at *F1*.

As learner *B* is wait-listed before learner *A*, they are considered first, using the dynamic enrollment limit on session *SB*. A spare seat at the facility *F1* means learner *B* can become enrolled. Next, learner *A* is considered using the fixed enrollment limit of *2*. After the withdrawal, there is only one learner in session *SA* so learner *A* is upgraded.

Example 2

Learner *A* attempts to enroll onto session *SA* and is waitlisted.

Learner *B* attempts to enroll onto session *SB* and is waitlisted.

In this situation, if a learner withdraws from session SA, only learner A is upgraded:

- As learner *A* is waitlisted before learner *B*, they are considered first, using the fixed enrollment limit of session *SA*.

- After the withdrawal there is only one learner in session *SA* so learner *A* is upgraded. Now learner *B* is considered, using the dynamic enrollment limit for session *SB*. After the learner *A* is enrolled, the facility is full again so learner *B* remains waitlisted.

However, if a learner withdraws from session *SB*, only learner *B* is upgraded:

- As learner *A* is waitlisted before learner *B*, they are considered first, using the fixed enrollment limit of session *SA*. As there are still two learners in session *SA*, learner *A* remains waitlisted.

- Now learner *B* is considered, using the dynamic enrollment limit for session *SB*. A spare seat at the facility *F1* means learner *B* can become enrolled.

Additional Information

About Facilities

Session Properties

About Waitlist Handling

There are two options to handle upgrades from waitlists in the LMS: automatic and manual.

Automatic Waitlist Handling

The Automatic Upgrade option puts the LMS in charge of handling a course's waitlist. Learners are placed into pending approval status until the end of the enrollment period, at which point the LMS checks whether the registered number of enrollments exceeds the minimum class size. If it does, the learners are enrolled or waitlisted on a first-come first-served basis. Enrolled users receive enrollment confirmation emails and the course is displayed on their My Courses page. Waitlisted users are either withdrawn by the LMS or transferred to another session of the course (if configured by the administrator).

> If you automatically upgrade participants on a waitlist for a session with enrollment limits, you must give them time to see the notification and make arrangements to attend the training. Therefore, it is helpful to set the *Cannot withdraw/transfer within* session property to a reasonable number of days before the session start date.

Manual Waitlist Handling

The Manual (Administrator) Upgrade option allows the administrator to change the learners' status (from Waitlisted to Enrolled, for example). Learners can check their status under the Pending Enrollments menu. Notification emails are sent to confirm enrollment and the course is shown on their My Courses list once they are approved.

Waitlist Clean-up

To automatically clean up waitlists once the enrollment period is over or the session has started, enable the *Clean-up waitlist automatically* System Configuration setting. The LMS will set the overall status of waitlisted users to *Dropped from Waitlist*. You can configure the Dropped from Waitlist Notification in the learning module's Email Preferences Setup. The notification will be sent to the learners who have been dropped from the waitlist either automatically or manually.

Additional Information

Session Properties

Configure Session Waitlist Handling

Email Preferences

Configure Session Waitlist Handling

Course administrators can select how learners who are on a waiting list for a session are processed.

To configure waitlist handling for a session

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning module you want to configure session waitlist handling for. The Catalog Editor opens at the Define Module Properties page.

2. Click the **Session Properties** tab.

3. Select a session from the drop-down list. The Session Properties page opens.

4. Select an option from the Waitlist Handling drop-down list.

Additional Information

About Waitlist Handling

Session Properties

Configure a Class Schedule

Course administrators can configure a class schedule for Classroom and Virtual Classroom sessions, using the planner on the *Edit session class schedule* page in the Catalog Editor to see when venues, instructors and resources are available. The planner shows the default instructors assigned to the session and recommended resources for the course, that is, instructors assigned in the session's Instructors page, and recommended class resources specified in the learning module's Recommended Class Resources page.

You can change the Working Days and Working Hours shown on the planner to coincide with local working hours or those of a particular venue or training center; the duration of the scheduled class is shown as a proportion of the working hours for each day.

> ⓘ The session will still be displayed in catalog and to instructors after its end date unless you explicitly check the *Automatically update event status to Ended when End Date day is reached* box.

To add a class schedule

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning module you want to configure a class for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session to configure.

3. Select a session from the drop-down list and click **Go**.

4. Click **Edit session class schedule** in the Session Properties tab. The Session Class Schedule page opens.

5. Click **Add new**. The Schedule a New Class page opens in a new window.

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

7. Click **Go**. The planner switches to the week containing the start date. If the resources required for the class are not available for the selected date, you can click **Previous Fit** or **Next Fit** to find the nearest date before or after the preferred date respectively, when the resources are available.

8. To book a class into a venue not associated with a training center, select **Venue** and enter a venue name and, if needed, a room name.

9. To book a class into a training center, select **Training Center** and then select a training center from the drop-down list. The associated venues and resources are listed in the resource planner. A horizontal bar in the planner indicates that a venue or resource has already been booked during a particular time period. If the bar is yellow, the booking belongs to the current course session; if it's red, the booking belongs to some other course session. More information about the booking is shown when you mouse-over the horizontal bar.

10. Optionally, enter the minimum and maximum class size for a training center. Venues whose capacity is outside of the class size range are removed from the list of venues you can select. The minimum and maximum class sizes for venues are specified in the Facilities for the training center.

11. On the planner, select one venue associated with the training center for the current class by clicking the icon to the left of it.

12. Instructors set at the session level are automatically included in the planner. To add more instructors to the planner for the class, click the **+** icon next to **Instructors** in the planner. The Select Instructors window opens. (This works in the same way as the User Selector.) Existing bookings for the instructors are indicated by horizontal bars. More information about each booking is shown when you mouse-over the horizontal bar.

13. Check the box of one or more instructors to book for the class.

14. Enter the number of each available resource to book for the class.

15. Click **Book Selected Resources**. The Schedule a New Class window closes, returning you to the Session Class Schedule page. The new class schedule is added to the Class Schedule list.

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

To edit a class schedule

Follow the steps above, but instead of clicking *Add new* at step 5, click the icon on the right-hand side of the class schedule you want to edit.

Additional Information

About Class Resources

About Recommended Class Resources

Assign Instructors to a Class Schedule

About Training Centers

About Facilities

User Selector

Learning Program Session Module Assignment

The tables below describe the session properties which you may need to configure for program sessions. Related session properties are grouped under a descriptive heading.

To access session properties

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning program you want to access session properties for. The Catalog Editor opens at the Define Module Properties page.

2. Click the **Session Properties** tab.

3. Select a session from the drop-down list or click the **Add Session** icon.

Table: General Session Properties

Property	Description
Title	This is the program session ID that was entered on creation of this session. The title is shown in the Course Details and could indicate something unique or descriptive about the session, such as the term or semester and year (although the session dates are also listed in the Course Details).
Description	Enter a description for the session. This is shown in the Course Details.
Event Status	When you create a new session, the Event Status defaults to the status selected in the *Default Event/Session Status on Session Creation* System Configuration setting. You can change the default Event Status. Other event statuses are: • *Active*—The session is available for enrollment as soon as it is saved. • *Pending*—Use this status when you are preparing a session which is not yet available for enrollment. • *Completed*—The session has finished. • *Closed*—The session is no longer available for enrollment. • *Cancelled*—The session was scheduled but has been cancelled. • *Invitation Only*—Learners can not self-enroll in the session and must be enrolled by an administrator. • *Retired*—The course has been retired and any currently enrolled online session can no longer be launched. For more information about setting the Event Status, and additional options for prompting the user to select a session, see Guidelines for Setting the Event Status.

Change transcript status of enrolled users correspondingly, for changing the event status to Completed, Cancelled or Retired or changing from Prompt User to Select Session to another status	If this check box is selected, the status on the transcripts of the enrolled learners are updated according to changes in event status.
Delivery Language	Sessions can be delivered in a specific language you select from the list. For learning modules with more than one session, such as classroom-based courses available in different locations, you can define the learning module as multi-language and specify the delivery language for each session. The languages available are determined by the languages purchased by your organization.
Time Zone	You can select the time zone in which the session takes place.
Start Date and End Date	You can specify the start date and time and end date and time for the session.
Enrollment Begin Date and Enrollment Deadline	To specify a window of time during which learners can enroll in the session, select the begin and deadline dates and times.
Credits	Specify the credits for the session.
For program modules with payment configured, enforce payment before first launch	Select this check box to take payment for the learning module before it is launched for the first time.

Table: Module Completion Deadlines

Property	Description
On enrollment, calculate deadline as follows	Select an option to calculate the deadline to complete the learning modules in the program session: • *No deadline, these will be set manually per learner if necessary.* • *[Value] Days from Enrollment (0 implies unlimited)*—Specify the number of days from the enrollment allowed to complete the program session. • *Date Specific Deadline*—Specify the program session completion deadline. ⓘ New deadline settings must be explicitly applied to the selected learners in order for the new deadline to be reflected in their transcripts.

Once the deadline against a transcript has passed	Select an option: • Do nothing, the deadline was just for reference. • Set transcript to *Deadline Expired* and block learner from launching the course. • Block learner from launching other courses until they complete this course.
View Participant Deadlines	Click this link to view the list of participant status and deadlines. Participant deadlines are calculated on enrollment, thus changing the deadline alone will not affect the deadlines for existing course participants. A change in the course completion deadlines can be applied to learner transcripts with the following statuses: • Waitlisted • Not Started • In Process • Pending Approval

This section lists the learning modules (including other programs) that have been associated with this program. You can remove an association from the learning module's Associated Programs page.

Table: Session Module Assignment

Property	Description
Modules cannot be accessed until all preceding modules are completed	Select this check box to enforce the the completion of the assigned learning modules in the order specified. Before a learner can start the next module, their transcript status for the preceding learning module must be any one of: • Completed • Completed (Self-asserted) • Waiver/Exempt • Passed
Allow learner to advance to next order on failing preceding learning	This option is available only when the check box above is selected. You can select this check box to allow learners to advance to the next learning module if they fail the preceding module.
Hide modules blocked by preceding modules in Learner's Available Modules	This option is available only when the *Modules cannot be accessed until all preceding modules are completed* option is selected, and takes into account both options above. Select this check box to hide learning modules from the learner until they have either completed the preceding learning module (or failed it, if the option above is selected).

Program completion requires modules to be on Effective/Approved revision	Select this check box if learners are required to complete the current effective or approved revision of each learning module in the program.
Modules cannot be accessed until their prerequisites are fulfilled	Select this check box to bypass prerequisite checking for assigned modules during enrollment. The learning module prerequisites will be checked when the learner launches the course.
Required Credits for Elective Modules	Enter the number credits the learners need to earn to enroll in elective learning modules in the program.
Use predefined credits	Select this option to award to the participant on completion of the learning module the credits defined in the module's session properties.
Use credits defined below	Select this option to specify the number of credits to award to participants on completion of the assigned learning modules. You can specify the number of credits for each module individually. This option takes precedence over the number of credits defined in the learning module's session properties.
Passing Score	You can enter a minimum score for passing the program. If you enter a score, learners will fail the program if they do not achieve the passing score. Leave the the passing score set to 0 disable it.
If a learner reaches a FAILED or DEADLINE EXPIRED status for a sub-module:	
Allow learner to re-enroll on the module within the context of this program	Enrollment checks like approvals, prerequisites and waitlisting may still apply when the learner re-enrolls.
Do not allow the learner to re-enroll on the module within the context of this program	Select this option to block learners from re-enrolling in a learning module via the program if their status for it reaches *Failed* or *Deadline Expired*.
Automatically fail this program for the learner if mandatory modules or elective credits requirement can no longer be met	This option is available if the option *Do not allow the learner to re-enroll on the module within the context of this program* is selected.
Apply Policy Approval for Non-auto enroll Program Modules	Select this check box to enforce the enrollment policy approval workflow configured for the learning module if learners are not auto-enrolled.

Table: Collaboration Tools

Property	Description
Forum	Link a Forum Category or Single Forum to the program session so that the learners and instructors can access the session level forum / category through the Knowledge Center.

Additional Session Attributes

Assign values to any configured session attributes.

Table: Workflow Assignments

Property	Description
Select a workflow template	Assign a workflow template to the program session. Workflow Templates are defined in the Assessment Workflow Manager.
Disable workflow assignment for this session	If checked, all workflow will be ignored for the enrollment of this program session. When a learner enrolls in the program session, the LMS looks for the correct workflow for the enrollment and assigns the exam or evaluation in the workflow to them. It will be accessible to learners from the Overview and Assessment Workflow in the Knowledge Center.

Additional Information

Guidelines for Setting the Event Status

Assign Prerequisites

About Enrollment Policies

About Assessment Workflow Templates

Configure Enrollment Restrictions for a Session

Enrollment restrictions enable you to limit the number of enrollments in a course or session between two dates for one or more organizations. You can apply the restriction to specific job profiles. If enrollment is requested outside of the date range, the restrictions are not enforced.

You can configure multiple rules that target different organizations and job profiles so that the number of enrollments allowed for a particular course or session can differ between organizations.

For learning modules with one or more sessions, enrollment restrictions defined at the module level are applied to its sessions by default. For each session, you can choose to have no restrictions, keep the module level restrictions, or define different restrictions.

To configure an enrollment restriction for a session

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to configure a session-specific enrollment restriction for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session.

3. Select a session from the drop-down list and click **Go**.

4. Click **Enrollment Restriction** in the Session Properties tab. The Enrollment Restriction page opens.

5. Select **Use Session Restriction** from the Restriction Process drop-down list.

6. Click the **calendar** icon to select the start date from which the restriction applies.

7. Click the **calendar** icon to select the end date after which the restriction no longer applies.

8. In the Rule(s) section click the **Select organization(s)** field label or box to select the organizations for which the number of enrollments will be restricted. The Organization Selection page opens in a new window. You must select at least one organization.

   To remove an organization from the list of selected organizations, select it in the list and click **Remove**.

9. In the Limit per Organization(s) field enter the number of enrollments allowed for the selected organizations.

10. To select the job profiles to which the restriction will apply, click the **Select Job Profile(s)** field label and select one or more job profiles in the Selector page.

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

12. If you want to add different enrollment limit to other organizations and, optionally, job profiles, click **Add Enrollment Restriction** and repeat steps 6 to 9.

Additional Information

Define an Enrollment Policy for a Learning Module

Configure Cost Information for a Session

Course administrators can configure cost information for sessions, which overrides any module-level cost information settings.

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

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

To configure cost information

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module to open. The Catalog Editor opens at the Define Module Properties page.

2. Click the **Sessions Properties** tab and select the session to configure cost information for.

3. Click **Enter cost information** in the Session Properties tab. The Cost Information page opens.

4. Enter the cost information properties. For more information, see Cost Information Field Reference .

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

Additional Information

Cost Information Field Reference

About Token Payments

Create an Optional Payment Item

Pay for Course Enrollment with a One-off Token Payment

Refund a One-off Token Payment

Cost Information Field Reference

The following cost properties specify how the course, session or program costs are registered in the Accounts tab in the participant's profile when they enroll. Cost information can be configured at the module level and—optionally—at the session level, which takes precedence over the module cost information.

Table: Cost/Enrollment Information

Property	Description
Charge Procedure	Select from the drop-down list how the course cost is registered and charged.
	Select **Charged per Registration** to register a charge each time a participant enrolls in the course. The cost is registered in the Accounts tab in the participant's profile. You cannot add optional payment items to this type of charge.
	Select **Online Payment** to enable the participant to make the payment via an online payment gateway or with tokens. Online payments can be configured to accept tokens or currency, and enable you to charge for optional payment items.
	Select **Organization One Off Token Payment** to charge a one-off amount for an entire module and debit this amount from the organization's token account instead of charging per individual learner enrollment.
	For sessions, you can choose to use the setting configured at the module level or select a different procedure.
Charged Cost Center	For non-token payment, you can enter the name of a cost center to associate the charge with.
	If you enter a cost center, it overrides the cost center defined for the learner (if applicable) in the User Editor. Otherwise, leave this field blank to use the learner's cost center.
	If the *Show additional enrollment information in records/transcript* System Configuration setting is enabled, the Charged Cost Center is shown in the Knowledge Center > Records/Transcript area.
Currency	For non-token payment, select from the drop-down list the currency in which the course is charged.
	The currency is shown in the Course Details for each module session.

Cost	For non-token payment, enter the cost in the selected currency.
	For token payment, enter the number of tokens to charge for the course.
	For organizational one off token payments, enter the number of tokens to charge and click **Deduct Payment** to take the token payment from one or more organizations.
	The cost is shown in the Course Details for each module session.
Price Info	You can include any extra information about the course cost here for any of the charge procedures except Organization One Off Token Payment.
	The price information is shown in the Course Details for each module session.

Optional Payment Items

Optional payment items can represent generic categories of items, such as textbooks, starter packs or accommodation, and can be used for multiple courses.

You can specify the costs of optional payment items for learners to buy when they are buying a course. You can configure the cost of the items at the module or session level, so each session can have its own pricing. You can also specify the cost type of optional payment items, which determines how the cost of each is calculated.

Table: Optional Payment Items Cost Types

Optional Payment Item Type	Description
Per Night of Course	This is calculated based on the total number of days that the course session spans minus one. For example, if a course session spans five days (that is, starts on Monday and ends on Friday), the computed duration for the payment item will be four.
Per Business Night	This is calculated based on the number of business nights that the course spans. It does not include Friday, Saturday, and Sunday nights or the last day of the course. For example, if a course session spans 14 calendar days (starts on a Tuesday, 1st September and ends Monday, 14th September), the computed duration for the payment item will be seven business nights.
Per Week of Course	This is calculated based on the number of weeks that the course spans. It does not take into account the fact that seven days equals one week. As long as the course spans on a week, the week is then counted.
Per Unit	This is calculated based on the number of units the participant buys.
% of Course Cost	The cost for this payment item is calculated based on a percentage in relation to the course cost.

Additional Information

Configure Cost Information for a Learning Module

Configure Cost Information for a Session

About Token Payments

Create an Optional Payment Item

Pay for Course Enrollment with a One-off Token Payment

Refund a One-off Token Payment

Add Reference Resources to a Session

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

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

- A file uploaded to the LMS Repository

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

Learners and instructors can access resources from these areas of the LMS:

- The Course Details page (if catalog access has been enabled)

- Knowledge Center (Reference Resources page and Overview page)

- Universal Search > Reference Resources

Embedded content opens in a modal pop-up.

To add a reference resource to a session

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module to open. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session to configure.

3. Select a session from the drop-down list and click **Go**.

4. Click **Enter references** in the Session Properties tab. The Reference Resources page opens.

5. Click **Add New Reference**. The Add New Reference modal pop-up opens.

6. To include a file from the Repository, click the **browse** icon to open the Repository Manager, where you can select the file.

7. To include a file or embedded content from outside of the LMS, enter the URL.

8. Check the boxes to specify whether learners, instructors or both can access the resource. Resources available only to instructors are shown in the Knowledge Center.

9. Select the reference type.

10. Check the box if you want to include a link to the resource in the catalog, which allows people to download it without having to enroll in the course first. You can also enable or disable catalog access to the resource from the action menu on the Reference Resources page.

11. Click **Add** to create the reference to the resource in the LMS.

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

Additional Information

About Reference Resources

About the Repository Manager

Add Reference Resources to a Learning Module

View or Update Session Participants

In the Catalog Editor course administrators can view a list of participants who have been enrolled into a session, and manage them by taking the following actions:

- Change their overall status for the session

- Update their deadline to complete the course session

- Transfer them to another session

- Send them an email

- Substitute another participant for their enrollment

- Re-enroll them in an alternative session

For On-the-Job (OTJ) learning types you can also assign supervisors who can complete the supervisor assessment exam for the OTJ course, in order for the course to be marked as Completed.

For more information about each action, follow the links at the bottom of this page.

To view the list of participants enrolled in a session

1. Go to **Manage Center > Learning > Learning Modules** and select the learning module you want to view the participants for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties**.

3. Select a session from the drop-down list and click **Go**.

4. Click **Participants** in the Session Properties tab. The Participants page opens with a list of participants who have a transcript record for the session.

5. Filter the list of participants, if required.

To manage the participants in the list

1. For a single participant, select an action from the action menu or select a new overall status from the drop-down list.

2. For multiple participants, check their boxes to select them and select an action from the Bulk Action drop-down list.

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

Additional Information

Change Participant Overall Status

Update Participant Session Completion Deadline

Session Transfer

Send Participants an Email

Enrollment Substitution

Re-enroll Participants to an Alternative Session

About On-the-Job Training

Enrollment Substitution

Update a Participant's Deadline

You can update the course session completion deadline for one or more participants who have one of the following transcript statuses:

- Waitlisted

- Not Started

- In Process

- Pending Approval

Two lists of participants are shown in the Update Participant Deadlines dialog: the top list includes those participants who will have their deadline updated, and the bottom list includes those who will not be affected because they do not have a valid status, as shown above.

When you update the deadline for participants, you can select one of three options from the Deadline Method drop-down list:

- Remove an existing deadline

- Set the new deadline at a specified number of days after their enrollment date

- Set the deadline to a specific date

Click **Preview** to see the new course completion deadline for each participant.

Click **Update** to apply the deadline update(s). The Update Participant Deadlines dialog closes, returning you to the Participants page.

Additional Information

View or Update Session Participants

About Changing Participant Overall Status

Changing a participant's enrollment status is available only for session-based learning types. Course administrators can change session participants' overall (enrollment) status in the Catalog Editor. Other administrators or instructors can change participants' session status from the Session Administration page (Home > Teach > Session Administration).

To change a participant's overall status in the Catalog Editor for a session, you must have unrestricted access permission for the module or session and a role with unrestricted access to the *Catalog Editor - Session Management feature* in System Roles (Manage Features > Catalog Manager Features). The list of Transcript Statuses that you see in the participants list filters and Overall Status Change drop-down list also depends on permissions.

To change a participant's overall status from the Session Administration page, you must have the *Allow Bulk Session Status Update* Role General Permission.

When you change a participant's overall status, it may affect their eligibility for competencies and certifications, and could result in new ones being awarded or existing ones revoked. Therefore, the following limitations apply when changing the overall status:

- Only the participant's latest transcript can be changed from a Completed to an Incomplete status.

- If the transcript contributes to one or more programs for the learner, all program transcripts must be set to Incomplete before the sub-module transcript can be changed from Completed to Incomplete.

Table: Allowed status transitions

Pre-statuses	Current Status	Post-Statuses
Completed's Pre-statuses	Waiver/Exempt	Completed's Post-statuses
Withdraw's Pre-statuses, Withdraw and Withdraw - Invalid Reason	Withdraw - Valid Reason	Withdraw - Invalid Reason
Withdraw's Pre-statuses, Withdraw and Withdraw - Valid Reason	Withdraw - Invalid Reason	Withdraw - Valid Reason
In Process	Excused	
Waitlisted	Dropped from Waitlist	

Additional Information

Change a Participant's Overall Status

View or Update Session Participants

Permissions

Change a Participant's Overall Status

Course administrators can change session participants' overall (enrollment) status in the Catalog Editor. Other administrators or instructors may also have permission to change participants' session status from the Session Administration page (Home > Teach > Session Administration).

To view in the Manage Center the list of participants enrolled in a session

1. Go to **Manage Center > Learning > Learning Modules** and select the learning module you want to view the participants for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session.

3. Select a session from the drop-down list and click **Go**.

4. Click **Participants** in the Session Properties tab. The Participants page opens with a list of participants who have a transcript record for the session.

5. Select the new status from the Overall Status Change drop-down list.

Additional Information

About Changing Participant Overall Status

View or Update Session Participants

Session Transfer

You can transfer participants to another session as long as they have not completed their current session. When a participant is transferred to another session they are sent a Session Transfer Notification email. You can select the email template to use for this in the Enrollment Policy Editor for Enrollment Policy used for the learning module. You can use the default email template for session transfer or you can create your own in the Email Template Editor.

When you select one or more participants for session transfer, the Session Transfer dialog opens with a list of participants who will be transferred and, if any participants with an invalid session status have been selected, a list of participants who will not be transferred.

To transfer participants to another session, your user role must have unrestricted access permission for the *Session Transfer* feature in System Roles (Review Features > Review Submenu Features).

To transfer the eligible participants

1. Go to **Manage Center > Learning > Learning Modules** and select the learning module you want to view the participants for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session.

3. Select a session from the drop-down list and click **Go**.

4. Click **Participants** in the Session Properties tab. The Participants page opens with a list of participants who have a transcript record for the session.

5. Select **Session Transfer** from the participant's action menu.

6. Select a new session from the drop-own and click **Transfer**. The Session Transfer dialog closes and the participants who have been transferred are removed from the participants list for the current session.

Additional Information

View or Update Session Participants

About Enrollment Policies

About Sending Participants an Email

Course administrators can write a custom email and send it to one or more session participants, or send one of the following standard email notifications to individual participants:

- Enrollment Confirmation
- Module Not-Yet-Accessed Reminder
- Gentle Completion Reminder
- Gentle Deadline Reminder
- Start-of-Session Reminder

- Completion Notification
- Session Waiting Reminder
- Session Finish Notification
- Escalation of Completion Reminder

The choice of standard emails corresponds to the email templates selected in the session's email preferences. An email template must be specified for each type of notification for it to be available to send to a participant.

The email template used to send one of the standard emails is specified in the Email Preferences for the learning module. (It will be the default email template unless a user-defined template has been selected.)

You can send these one-off emails to participants from the Participants page for a session in the Catalog Editor. Emails sent to participants this way do not affect other automated emails sent to users when various events occur, such as course enrollment.

Additional Information

Send Participants an Email

View or Update Session Participants

Configure Email Preferences for a Session

Enrollment Substitution

Enrollment substitution is available only for the Learning LMS license. It enables you to replace a participant enrolled in a session with another participant. To substitute a participant, the following prerequisites must be satisfied:

- The system configuration setting *Show enrollment substitution in session properties of catalog editor* must be enabled.

- The session cannot be for a program learning module.

- The overall status of the selected participant must be *Not Started* or *In Process*.

- The session must have not started.

When you select a new learner for the substitution you can choose whether to send them notification emails, such as an enrollment confirmation.

To view the list of participants enrolled in a session

1. Go to **Manage Center > Learning > Learning Modules** and select the learning module you want to view the participants for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session.

3. Select a session from the drop-down list and click **Go**.

4. Click **Participants** in the Session Properties tab. The Participants page opens with a list of participants who have a transcript record for the session.

5. For a single participant, select **Enrollment Substitution** from the action menu or select a new overall status from the drop-down list.

6. For multiple participants, check their boxes to select them and select **Enrollment Substitution** from the Bulk Action drop-down list.

Additional Information

View or Update Session Participants

Re-enroll Participants in an Alternative Session

Learners can reach a terminal enrollment status that does not attain credit, such as *Dropped from Waitlist*, *Failed* or *No Show*. If the course is mandatory, course administrators can re-enroll those learners in an alternative session, either individually or in bulk.

You can re-enroll participants in an alternative session only if they do not already have an active transcript status for the same learning module in their course history record.

To re-enroll participants in an alternative session

1. Go to **Manage Center > Learning > Learning Modules** and select the learning module you want to view the participants for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties**.

3. Select the original session from the drop-down list and click **Go**.

4. Click **Participants** in the Session Properties tab. The Participants page opens with a list of participants who have a transcript record for the session.

5. Select **Re-enroll to alternative session** from the action menu for a single participant, or select the learners from the Participants list and select **Re-enroll to alternative session** from the Bulk Actions drop-down list. A dialog box opens with a list of participants who will be re-enrolled and, if any selected participants have an active transcript status for the learning module, they are listed as participants who will not be re-enrolled.

6. Select an alternative session from the drop-down list and click **Enroll**. The dialog closes and the Group Enrollment page opens with the participant(s) pre-selected for enrollment in the selected session.

7. Click **Execute group enroll** to complete the re-enrollment.

> ⚠️ Do not click the Save icon on the Group Enrollment page—it resets the form.

Additional Information

[View or Update Session Participants](#)

Define Session Approver

If a program session has an enrollment policy that includes an enrollment approval step, course administrators can select up to two people who can approve the enrollment. When a learner requests enrollment into the program session, the people you select here are sent the approval request email.

To select up to two session approvers for the program

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the program module to open. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session to configure.

3. Select a session from the drop-down list and click **Go**.

4. Click **Define Session Approver** in the Session Properties tab. The Learning Program Session Approver page opens.

5. Click the **browse** icon to select a session approver. The Select Approver selector page opens in a new window.

6. Select the session approver for the program session. (For more information about selector pages, see the User Selector.)

7. Repeat steps 5 and 6 for a second approver, if required.

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

Additional Information

About Enrollment Policies

Enrollment Approval for Composite Programs

Assign Instructors to Class Schedules

Course administrators can select the default instructors to assign to new class schedules, and also add instructors to individual session classes. You can manually select the default instructors or have them automatically assigned based on competency qualifications. When you assign default instructors to new classes, they are automatically selected as the instructor when you add a new class schedule to a session.

> ⓘ The users assigned as instructors for classroom or virtual classroom sessions will very likely need access to LMS features associated with the Instructor role, so it is advisable to check that they have a role with access to those features.

To assign instructors to class schedules

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the classroom or virtual classroom module to open. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session to configure.

3. Select a session from the drop-down list and click **Go**.

4. Click **Instructors** in the Session Properties tab. The Edit instructor list page opens.

5. To manually select one or more default instructors to assign to all new class schedules for the session:

    a. Click **Manual Assignment** if it is not already selected, and then click **Select instructors**. The Select Instructors window opens.

    b. Select the instructors and click **OK**. (For more information, see User Selector.)

    c. To remove instructors from the list, select them in the Instructor Configured box and click **Remove instructors**.

6. To automatically assign instructors to new class schedules based on their competencies:

    a. Click **Dynamic Assignment** if it is not already selected, and then start typing the name of a competency in the text box. As you type, matching competencies are listed so you can select one.

    b. Select a competency from the auto-suggest list and, optionally, select a required level from the drop-down list.

    c. Click **Refresh**. Any users who have the required competency are listed under the Current Instructor List heading.

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

Additional Information

About Instructors

Configure a Class Schedule

About Session Email Notifications

Course administrators can configure the emails that the LMS sends to learners relating to sessions they are enrolled in, on a waitlist for, or have indicated interest in.

To configure email notifications for a session, see Configure Email Preferences for a Session.

New Session Available Notification

When new sessions become available for enrollment, the LMS can send an email notification to learners who have indicated interest in the course (in the Course Details).

The email template used for the notification is determined by the *New Sessions Available Notification* in the Enrollment Policy Details for the enrollment policy assigned to the learning module. There is no System Default email template for new session notifications. To configure the LMS to send a New Session Available notification email, you must assign an appropriate email template to the enrollment policy for the learning module the session belongs to.

The Save Options dialog with new session notification options is shown only when the following conditions are met:

- At least one learner has indicated interest in the course for which there is currently no availability.

- You clone an existing session, or change an inactive session's Event Status to Active. If you create a new session, you have to change its status from a non-active (for example, Pending) status to an Active status. This may require changing it from Active to Pending to Active.

- The start date of that session is in the future.

- An appropriate email template has been assigned to the enrollment policy for the learning module the session belongs to.

On cloning or creating a new session and updating its status, the Save Option gives you a choice for sending a Session Available notification email to each learner who indicated interest, or to not send any notifications.

Session Cancellation Email

When a session is cancelled, its active participants and instructors can be notified by email. You can select the email templates to use for the session cancellation email for the participants and instructors separately in the *Catalog* System Configuration settings:

- Session Cancelled E-mail Template to be sent to Participants

- Session Cancelled E-mail Template to be sent to Instructors

There are no System Default email templates for session cancellation email messages to participants or instructors. You can configure them in the Email Template Editor and the select them in the System Configuration settings listed above. An example message to participants of cancelled sessions might be as follows:

```
The course, {course_title}, which you are enrolled in, has been cancelled. For more
information, please contact the instructor or system administrator.
```

Retired Session Notification Email

You can configure the LMS to send an email notification to learners enrolled in a session when its status is changed to *Retired*. For an email to be sent, the *Session Retired E-mail Template to be sent to Participants* System Configuration setting must specify an appropriate email template.

Session Changed Notification

You can configure the LMS to send an email notification to participants and instructors if any changes are made to a session's start or end dates, or to its venue or facility booking, via the Catalog Editor. A learner is considered a participant if they are enrolled in the session (which must have an *Active* or *Invitation Only* Event Status) and their transcript status for the session is *Not Started* or *In Process*.

You can select the email templates to use for the session changed email for the participants and instructors separately in the *Catalog* System Configuration settings:

- Session Changed E-mail Template to be sent to Participants

- Session Changed E-mail Template to be sent to Instructors

There are no System Default email templates for session change email messages to participants or instructors. You can configure them in the Email Template Editor and the select them in the System Configuration settings listed above.

Additional Information

Email Preferences

Configure Email Preferences for a Session

Configure Email Preferences for a Module

Send Participants an Email

Course administrators can send a standard or custom email to one or more session participants.

To send an email to a single participant

1. Go to **Manage Center > Learning > Learning Modules** and select the required learning module. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session.

3. Select a session from the drop-down list and click **Go**.

4. Click **Participants** in the Session Properties tab. The Participants page opens with a list of participants who have a transcript record for the session.

5. Filter the list of participants, if required.

6. Select an email option from the action menu.

To send a custom email to multiple participants, check the boxes of the participants to send it to and then select **Send Email** from the Bulk Action menu.

Additional Information

About Sending Participants an Email

View or Update Session Participants

Configure Email Preferences for a Session

configure_email_preferences_session

Whenever certain events occur relating to classroom or virtual classroom courses, emails can be sent to a range of LMS users, including the course participants, instructors, and managers. A set of *System Default* email templates specify the email content, recipients, and in some cases, frequency of dispatch. The learning module-specific events that can trigger an email are described in Email Preferences. Additional emails that can be triggered are described in About Session Email Notifications.

Instead of using the default email templates, administrators can select and configure custom email templates to send the emails at the module level and also for each session individually. Email preferences configured at the session level take precedence over those configured for the learning module. If no email preferences are configured for a session, the emails configured for the module are used.

To configure the email preferences for each session-related event

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning module you want to configure email preferences for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session to configure.

3. Select a session from the drop-down list and click **Go**.

4. Click **Email Preferences Setup** in the Session Properties tab. The Email Preferences Setup page opens.

5. For each event you want to use a custom email template for, click the **browse** icon. The Email Template Editor opens in a new window.

6. Select the email template to use from the Templates tab and click the **Select** icon on the toolbar. Alternatively, you can create a new email template and select that.

7. Enter or select any additional configuration options for each email, such as Frequency and the number of days before or after the event.

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

Additional Information

Email Preferences

About Session Email Notifications

Enter Additional Cost Accounting Information

Course administrators can enter additional costs for a course, which are not in the listed price. The cost accounting categories, used to categorize the costed items for the session, are configured in the Cost Accounting Categories page. You could use these additional cost categories to compensate for added expenses of conducting courses in particular locations, for example.

To add additional cost accounting information for a session

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module to open. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session to configure.

3. Select a session from the drop-down list and click **Go**.

4. Click **Cost Accounting Information** in the Session Properties tab. The cost accounting information page opens (titled *Edit the extra cost associated with this session*).

5. If you intend to add multiple costed items associated with this session, select the base currency from the drop-down list. This is used as the default currency for each item you add so you do not have to specify the currency each time.

6. Select the cost accounting category of the item from the drop-down list and—optionally—enter a brief description in the Extra Information field.

7. Enter the item cost in the Amount field.

8. Select the required currency if it is different from the base currency, and then enter the exchange rate between the base currency and item's selected currency.

9. Click **Add >>** to add another item.

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

Additional Information

[Create a Cost Accounting Category](#)

Create a Cost Accounting Category

Administrators can create cost accounting categories to categorize additional costs associated with course sessions. When you create a cost accounting category it becomes available in the Cost Accounting Information page in learning modules' session properties.

To create a cost accounting category

1. Go to **Manage Center > Learning > Cost Accounting Categories**. The Cost Accounting Categories page opens, listing any existing categories.

2. Click **+ Create Accounting Category**. A modal dialog appears.

3. Enter the category name and click **Save**. The new category is added to the list in the Cost Accounting Categories page.

Additional Information

Enter Additional Cost Accounting Information

Edit or Delete a Cost Accounting Category

Edit or Delete a Cost Accounting Category

Administrators can edit a cost accounting category to change its name. Cost accounting categories are used in the Cost Accounting Information page in learning modules' session properties.

To edit or delete a cost accounting category

1. Go to **Manage Center > Learning > Cost Accounting Categories**. The Cost Accounting Categories page opens, listing any existing categories.

2. Click the action menu of the category to edit or delete and select either **Edit Cost Accounting Category** or **Delete Cost Accounting Category**.

Additional Information

Create a Cost Accounting Category

Enter Additional Cost Accounting Information

About Course Checklists

You can configure checklists to track preparatory tasks such as booking a venue for classroom training, plane tickets and hotels for participants. For a module, you can configure a checklist that applies to all sessions, and in Session Properties you can configure checklist items specific to individual sessions, which can have a more flexible deadline relative to the session start or end date. You can choose to create your own checklist item or base it on a predefined template.

When you create a checklist item you assign it to an owner, that is, the person responsible for completing it. When you assign a new owner, they are sent an email notification using the email template specified in the *Course Checklist Owner Change Email Template* setting in System Configuration. To select a specific email template, go to **Manage Center > System > System Configuration**, select the **Catalog** category and click the **browse** icon for the *Course Checklist Owner Change Email Template* setting.

If you set a deadline for completion of the checklist item, the LMS can send a reminder email to the item owner a specified number of days before the deadline, using an email template specified in the *Course Checklist Item Reminder Email Template* setting in System Configuration. To select a specific email template for the reminder, go to **Manage Center > System > System Configuration**, select the **Catalog** category and click the **browse** icon for the *Course Checklist Item Reminder Email Template* setting.

To configure the course checklist for a module or session, or to review checklist items, go to **Manage Center > Learning > Learning Modules** and select a learning module. The Checklist page is available for modules and sessions.

Relative Deadlines for Session Checklist Items

To provide more flexibility in setting the deadline, other than a fixed date, you can configure the deadline of a checklist item to be relative to the session's start or end date. The session must have a defined start or end date in order to do this.

> ⓘ Note that for online learning modules this option is available when the system configuration setting *In catalog editor, show start date and end date fields for online modules* is enabled.

Checklist Templates

You can create checklist templates, which are containers for one or more checklist items that you can apply to any number of learning modules or sessions. This saves time as you can create common checklist items once and apply them multiple times instead of having to re-create them each time. You can use the Permissions selector to configure who can view and who can edit checklist templates.

Reviewing Checklist Items

Course administrators can review checklist items in the Catalog Editor or—if you are the item owner—on the Course Checklist page. Course instructors can review their assigned checklist items on the Course Checklist page. In either case, when a checklist item is done, you mark it as complete.

LMS administrators and instructors must have unrestricted access to the *Course Checklist* Role Access Control in order to review checklist items and mark them as complete.

Additional Information

Configure Session Checklist Items

Create a Checklist Template

Review a Course Checklist

Permissions

Configure Session Checklist Items

Course administrators can configure checklists for learning modules and sessions to track preparatory tasks such as booking a venue for classroom training, and plane tickets and hotels for participants. You can create a new checklist item by completing the required checklist item fields, or you can generate one or more checklist items from a predefined template.

When you generate checklist items from a template, you can edit each item if required, assigning it to a different owner, for example.

> ⓘ   To provide more flexibility than a fixed date when setting the deadline, you can configure the deadline for a session checklist item to be relative to the session start or end date. For online learning modules, the system configuration setting *In catalog editor, show start date and end date fields for online modules* must be enabled to make this option is available.

To create a checklist item

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to configure a checklist for. The Catalog Editor opens at the Define Module Properties page.

2. Click the Session Properties tab.

3. Click **Checklist**. The Checklist page opens and by default lists any previously created checklist items that have not been completed.

4. Select **Create New Item** from the Create Checklist Item drop-down list. The Create Item dialog opens.

5. Enter a descriptive name for the item.

6. Assign an owner to the checklist item. Optionally, click the **browse** icon and select the LMS user to assign it to. When you assign a new owner, they are sent an email notification immediately.

7. To set a deadline for a checklist item to be completed, select a date from the Deadline date picker field, or specify the deadline as a number of days before the session start date or after the session end date.

8. To send a reminder email to the item owner a specified number of days before the deadline, select the **Send reminder** check box.

9. Click **OK** to save the checklist item.

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

To generate a checklist from a template

1. Repeat steps 1 and 2 above to navigate to the Checklist page in the Catalog Editor.

2. Select **Generate from Template** from the Create Checklist Item drop-down list. The Create Item dialog opens.

3. Select the template from which to add the checklist items from the drop-down list and click **OK**. The checklist items defined in the template are added to the checklist.

4. To edit a checklist item, select **Edit** from its action menu.

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

Additional Information

Create a Checklist Template

About Course Checklists

Create a Checklist Template

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

To create a checklist template

1. Go to **Manage Center > Learning > Checklist Template**. The Checklist Template page opens, listing any previously created templates.

2. Click **+ Create Checklist Template** or, to edit an existing template, click the template name in the list. The Create/Edit Checklist Template page opens.

3. Enter a descriptive name for the template in the Template Name field.

4. Click **+ Create Checklist Item** to add an item to the template. The Create Item dialog opens. You can add any number of checklist items, configuring them one at a time.

5. Configure the checklist item fields.

6. Repeat steps 4 and 5 until you have added all of the required checklists items to the template.

7. To edit a checklist item in the template, select **Edit** from its action menu.

8. To delete a checklist item from the template, select **Delete** from its action menu. When you delete a template the checklists created from that template are not deleted from the modules or sessions they have been added to.

9. Click **Permissions** to configure the read-only and unrestricted access to the template. Read-only permission allows LMS users to view the template and use it to generate checklists in the Catalog Editor. Unrestricted permission allows users to edit the template checklist items in addition to using templates in the Catalog Editor.

10. Click **Save** to save the template. Course administrators can now generate checklist items from the template.

Additional Information

About Course Checklists

Configure Module Checklist Items

Configure Session Checklist Items

Permissions

Review a Course Checklist

Course instructors can review checklist items assigned to them in the Workspace > Course Checklist page. Course administrators can also review the status of checklist items in the Catalog Editor.

When you open the Course Checklist page from the Workspace menu you see a list of checklist items assigned to you that have not been completed. For a module checklist item, only the module title is shown; for a session checklist item, both module and session title (or session code if session title absent) are shown.

When you have completed a checklist item, you update its status from Incomplete to Completed. You can also revert the status of an item from Completed to Incomplete.

To review a course checklist that has been assigned to you

1. Go to **Home > Workspace > Course Checklist**. The Course Checklist page opens and lists all incomplete items assigned to you.

2. Select the course and session from the drop-down lists and click **Filter**.

3. To update the status of an item to Completed, click its **check mark** icon. Its status is updated to Competed with the current date, time and your user name. Repeat this step for all items you want to mark as completed.

4. To revert the status of a completed item to Incomplete, filter the list to show completed items, then click its **check mark** icon. The status changes back to Incomplete and the date, time and user name are removed.

To update the status of a checklist item in the Catalog Editor

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to configure a checklist for. The Catalog Editor opens at the Define Module Properties page.

2. Click the **Session Properties** tab.

3. Click **Checklist**. The Checklist page opens.

4. Filter the list to show either or both completed and incomplete checklist items by selecting an option from the Item Status drop-down list.

5. To update the status of a checklist item, select **Mark as Completed** or **Mark as Incomplete** as required from its action menu.

Additional Information

About Course Checklists

Generate Course Coupons

The course coupon enrollment scheme provides an alternative way for learners to enroll in a designated course, without having to search or browse the catalog for it. As the course owner, you can generate a set of course coupons for a specific session and distribute them to a reseller (LMS users). The reseller then distributes the coupon ID to the learner by email or other preferred means. The learner then enters the course coupon ID on the Course Coupon Enrollment page to enroll directly in the session.

Each set of coupons can have a single reseller, but you can generate multiple sets of coupons for the course, each for different resellers. If you plan to distribute course coupons for the session to multiple resellers, you could use the Coupon Prefix field to identify each reseller.

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

To generate a course coupon

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning module you want to generate course coupons for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session to configure.

3. Select a session from the drop-down list and click **Go**.

4. Click **Course Coupon** in the Session Properties tab. The Course Coupon page opens. Any existing course coupons are listed at the bottom of the page.

5. Enter the coupon details, starting with the number of coupons to generate for the reseller.

6. After entering the details for the set of coupon(s), click **Add more coupon(s)** to save them. They are listed at the bottom of the page and the *Edit course coupon* fields are cleared.

7. Repeat steps 5 and 6 to generate additional sets of coupons as required.

8. Click a course coupon ID in the list to edit its details, if required.

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

Reserve a Classroom Resource

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

To resource a resource

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the course you want to reserve a resource for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session to configure.

3. Select a session from the drop-down list and click **Go**.

4. Click **Resource Reservation** in the Session Properties tab. The *Edit resource reservation* page opens. Any resources already reserved for the session are listed at the bottom of the page.

5. Enter the resource reservation details and click **Add** to add the reservation to the session. Repeat this step for all of the resources you want to reserve for the session.

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

Additional Information

About Class Resources

About the Resource Planner

About Session Security

Different sessions belonging to the same learning module can be managed by different LMS administrators, who may be responsible for different geographic regions, for example. You can, therefore, configure permissions for individual sessions in addition to the access permissions for the learning module.

There are three levels of access to LMS objects that apply to both modules and sessions:

- Unrestricted

- Read only

- No access

It is important to remember that access to sessions depends on the level of access provided to their corresponding learning module. If a less restrictive level of access is provided to the learning module, it takes precedence over a more restrictive access permission specified for the session. This is illustrated in the table below.

Table: Resulting session permissions

		Module Permissions		
		Unrestricted	**Read-only**	**No Access**
Session Permissions	**Unrestricted**	Unrestricted	Unrestricted	Unrestricted
	Read-only	Unrestricted	Read-only	Read-only
	No Access	Unrestricted	Read-only	No Access

Session permissions are applied to the following areas of the LMS:

- Catalog Editor
- Data Loaders
- APIs
- Module and Session Selectors
- Reports and the Report Wizard

- Group Enroll
- Teach Review
- Checklist Item Management
- Auto Exception Management
- Question Pool Editor

Administrators with no access to an active session can access its properties from the Active Courses tab on the Teach page.

Additional Information

Define Session Security

Permissions

Define Session Security

Course administrators can configure access permissions for a session to specify who can view it or make changes to it. You must, however, take into account the permissions configured for the learning module. For more information, see About Session Security.

To allow course instructors to administer a specific learning session from the Session Administration page, you must give them read-only access permission to the session. To allow instructors to administer all sessions for a learning module, you must give them read-only access permission to the learning module (in which case you do not need to give them permissions for each session).

To configure the permissions for a session

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to set session-specific permissions for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session.

3. Select a session from the drop-down list and click **Go**.

4. Click **Define Session Security** in the Session Properties tab. The Define Session Security page opens.

5. Click **Permissions**. The Permissions Selector opens.

6. Select the instructors to give read-only access to.

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

Additional Information

About Session Security

Permissions

User Selector

Configure Associated Programs

Course administrators can see which program sessions include the learning module being edited in the Catalog Editor.

For each associated program session, you can:

- View the program module properties

- View the program session properties

- Run a session enrollment update (also available as a bulk action)

- Update the deadline for participants

- Edit the association (also available as bulk action)

- Remove the association

You can select the actions above from the action menu for individual program sessions in the list, or you can check the boxes of multiple program sessions and select an action from the Bulk Actions drop-down list.

If you are editing a session, you can assign it to one or more program sessions, including specifying program module settings like Required and Auto-Enroll. To assign a session to a program session, click **+ Add to Program Session**.

To configure associated programs

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to configure associated programs for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Associated Programs** in the Module Properties tab. The Associated Programs page opens.

3. Select an action from the action menu.

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

Session Enrollment Update

When the structure of a program session changes, it is sometimes necessary to explicitly update enrollments to reflect the new structure. Session Enrollment Update re-runs enrollment processing for the session.

When you run a program session enrollment update, you can choose one or more of the following options:

- Update the current program session enrollments for participants currently enrolled in the session

- Re-enroll learners who have previously completed the program session

- Send an email notification to each learner affected by the enrollment update

Progress Tracking Deadline Update

Participants must complete assigned modules by the deadlines specified in the Learning Program Session Module Assignment page to maintain a program progress of *On Target*. Deadlines are calculated and fixed at the time of enrollment, so changing a deadline in program's session properties affects only learners who enroll after it has been changed.

To apply an updated deadline to participants already enrolled in an associated program, select **Update Deadline of Users** from the action menu of the session.

To apply an updated deadline to multiple associated programs, check the boxes of the associated programs in the list and then select **Update Deadline of Users** from the Bulk Action drop-down list.

Edit the Association

You can update one or more module's weighting, order and credits for the associated program session, specify whether it is required, and run an enrollment update.

Remove the Association

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

Additional Information

About Learning Programs

Session Enrollment Update

Learning Program Session Module Assignment

Tin Can API

You can specify Tin Can (xAPI) activity parameters for the session in order to return only the API Statements whose Object is an Activity with the specified ID (that is, Statements in which the object.objectType is equal to *Activity* or absent, and in which the object.id is equal to the value of the supplied activity parameter).

In depth specifications for the Tin Can APIs (xAPI) is beyond the scope of this document. For more information, please request the Tin Can / xAPI Implementation Guide from your PeopleFluent representative, or make a request via the PeopleFluent Support portal: https://support.peoplefluent.com.

About Session Utilities

Session utilities enable you to configure and run enrollment processing and preview the Knowledge Center after making changes to the session properties.

Course administrators can:

- Configure and run auto-enroll

- Configure and run group enrollment

- Assign learners to a group training plan

- Run session enrollment update for a program

- Preview the session information and options in the Knowledge Center

To configure session utilities

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning module you want to configure session utilities for. The Catalog Editor opens at the Define Module Properties page.

2. Select the **Session Properties** tab.

Additional Information

Configure Auto-enroll Criteria

Group Enroll or Withdraw Learners in a Session

Assign Learners to a Group Training Plan

Program Session Enrollment Update

About the Knowledge Center

Configure Auto Enrollment Criteria

Course administrators can configure the selection criteria to automatically enroll learners in the selected session. You can select users based on any combination of the following properties:

- User group, role, logical domain or organization
- Completed courses
- Employment information
- Job profile or competencies
- User attributes

You can specify the start and end dates between which auto-enrollment can happen, and before you activate the auto-enrollment you can test it to see which users are selected.

You can specify the frequency with which the LMS scans users for auto-enrollment in the Auto-Enroll Console.

The *Ignore Prerequisites and Enrollment Approval Steps for Automatic Enrollments* System Configuration setting determines if prerequisite checks and approval steps, if any, are skipped during the automatic enrollment process.

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

To configure auto-enroll criteria for a session, you must have a system role with unrestricted access to the *Auto/Group Enroll* option under Manage Features > Catalog Manager Features.

To configure the auto-enroll selection criteria

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning module you want to configure auto-enrollment for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session to configure.

3. Select a session from the drop-down list and click **Go**.

4. Click **Auto-Enroll** in the Session Properties tab. The Auto-Enroll Properties page opens.

5. Select the **Valid From** and **Valid To dates** to specify when auto-enrollment can happen.

6. Select the check boxes to allow offline auto-enrollment and to ignore schedule conflicts, if required.

7. Expand the criteria headings (for example, Users/Organization/Role) to select the criteria used to determine which learners are auto-enrolled.

8. Click **Set Auto-Enroll Targets**. The auto-enrollment settings are saved.

9. To check which users are targeted by the criteria, click **Test Auto-Enroll**. The Test Auto-Enroll page opens.

10. Select whether test against the first 500 candidate users or all users.

11. Click **Test Auto-Enroll**. A list of users matching the auto-enrollment criteria is shown.

12. To update the selection criteria, click **Auto-Enroll** in the Session tab to return to the Auto-Enroll Properties page.

13. To delete the auto-enrollment criteria for a session, click **Deactivate**. All selection criteria are cleared.

Additional Information

About the Auto-Enroll Console

Group Enroll or Withdraw Learners in a Session

Course administrators can group enroll learners in a course session individually or based on role, organization, user group and user attributes. When you group enroll learners, the enrollment policy configured for the learning module is ignored and you can also bypass enrollment restrictions on the session.

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

You can also withdraw learners from an enrollment using the same bases as group enrollment for the user selection criteria.

To group enroll (or withdraw) learners in a course session, you must have a system role with unrestricted access to the *Auto/Group Enroll* option under Manage Features > Catalog Manager Features.

To bypass enrollment restrictions, the *Allow Enrollment Override* Role Access Permission must be enabled for your system role.

To group enroll or group withdraw learners

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning module you want to group enroll learners for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session to enroll learners into.

3. Select a session from the drop-down list and click **Go**.

4. Click **Group Enroll** in the Session Properties tab. The Group Enrollment page opens.

5. Click the **Select participant(s)** link to select the learners to enroll in the session. The User Selector page opens in a new window.

6. Select the learners to include in the group enroll and click **OK** to return to close the User Selector. The learners selected for group enrollment are listed in the *Select participant(s)* box.

7. To group enroll the selected learners, ensure *Group Enrollment* is selected in the Action drop-down list. To group withdraw the selected learners from an enrollment, select **Group Withdraw** from the Action drop-down list.

8. To suppress automatic emails that would normally be sent when the selected learners are enrolled in a session, select the **Suppress automatic emails** check box.

9. To bypass enrollment restrictions and checks for valid enrollment during the group enrollment, select the **Override?** check box.

10. To run prerequisite checks configured for the learning module on the selected learners before enrolling them, select the **Perform prerequisite checks?** check box. Learners who fail to meet the prerequisites are not enrolled.

11. To exclude learners from the group enrollment if it conflicts with another course they are enrolled in, clear the **Ignore Schedule Conflict** check box.

12. Enter the charged cost center, if required for the session.

13. Click **Execute group enroll** to start the group enrollment process. The Group Enrollment status page opens in a new window and lists the learners who were selected for group enrollment and their enrollment status (whether successful or not).

Additional Information

User Selector

About Enrollment Policies

Configure Enrollment Restrictions for a Session

Assign Learners to a Group Training Plan

Assign Learners to a Group Training Plan

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

You can:

- Select learners based on role, organization, user group and user attributes.

- Notify the learners by by email, selecting an appropriate email template, and add any additional comments in the separate Comment text box. Comments are shown in the learners' training plan.

- Specify the priority and expected completion dates of the module.

When you run the group training plan assignment, the course is listed in the learners' training plan (Learning Center > Training Plan) and Career Center. Learners are not enrolled into the course or any of its sessions by this process. They can open the Course Details from the Training Plan or Career Center and enroll from there.

To assign learners to a group training plan

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the learning module you want to assign to a group training plan. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** to select a session.

3. Select a session from the drop-down list and click **Go**.

4. Click **Group Training Plan** in the Session Properties tab. The Group Training Plan Assignment page opens.

5. Click the **Select participant(s)** link to select the learners whose training plans will be updated. The User Selector page opens in a new window.

6. Select the learners and click **OK** to return to close the User Selector. The learners selected are listed in the *Select participant(s)* box.

7. To remove the learning module from the selected learners' training plan, select **De-assign this module** from the Action drop-down list. Otherwise, leave it as **Assign this module**.

8. If the learning module has previously been assigned to a learner, the assignment details are updated by default when you assign it again. To keep the previous assignment details, such as the requested completion deadline, clear the **Update existing plans** check box.

9. To notify the selected learners by email that the learning module has been added to their training plan, click the **browse** icon to select an appropriate notification email template.

10. Optionally, enter a comment that appears in the learners' training plans.

11. Select a priority from the drop-down list to indicate to the importance of taking the course. The priority is shown in the learners' training plans.

12. Optionally, select a date by which you would like the learners to have completed the course. The priority is shown in the learners' training plans.

13. Click **Execute group plan assignment** to assign the learning module to the learners' training plans.

Additional Information

User Selector

Group Enroll Learners in a Session

Configure Auto Enrollment Criteria

Program Session Enrollment Update

When the structure of a program session changes, it is sometimes necessary to explicitly update enrollments to reflect the new structure. Session Enrollment Update re-runs enrollment processing for the session.

When a Session Enrollment Update has completed, a new window opens, listing the participants who have been re-enrolled and their update status.

To run Session Enrollment Update

1. Go to **Manage Center > Learning > Learning Modules** , and click the name of the program you want to run the Session Enrollment Update for. The Catalog Editor opens at the Define Module Properties page.

2. Click **Session Properties** and select the session to update enrollments for.

3. Click **Session Enrollment Update** at the bottom of the Session Properties tab. The Session Enrollment Update page opens.

4. Select the options for the enrollment update and click **Execute session update**. You are prompted to confirm the update before re-enrollment processing starts.

Additional Information

Program Session Enrollment Update Options

Program Session Enrollment Update Options

The table below describes the options available when you run Session Enrollment Update.

Table: Session Enrollment Update Options

Option	Description
Update current program session enrollments	Check this option to affect only the learners who are enrolled in the current program session. For example, if a new module is added, this update will enroll currently enrolled learners onto the new module as part of the program. Learners who have already completed the program are not affected.
Re-enroll users who have previously completed the program session	Check this option to re-enroll learners who have previously completed the session. Learners who complete the session hereafter are not affected.
Only re-enroll if user's current job profiles include this program	Check this option so that only the learners who have at least one current job profile assignment that involves this program will be re-enrolled.
Check here if you want to send an e-mail update notification to each affected user	Check this option to send an email notification to the enrollees.

Additional Information

About Learning Programs

Program Session Enrollment Update

About Assessment Workflow Templates

Assessment workflow templates consist of one or more pre- or post-course assessments that can be assigned to participants, instructors or direct appraisers.

You can create and edit assessment workflow templates in the Assessment Workflow Manager, where you specify one or more exams, the user requested to complete them, and the reminder email notification details for each.

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

Course administrators can assign assessment workflows to specific learning sessions in the Catalog Editor. All workflow assignments can also be disabled for a session, overriding any organization or system based workflows.

Administrators can assign assessment workflows to organizations in Organization Maintenance, so that users who are members of the organization are assigned the same assessments depending on the assessments assigned to participants, instructors and appraisers.

System administrators can assign assessment workflows to logical domains, to assign a system default workflow to all courses for everyone in the logical domain.

To create and edit assessment workflows, your user role must have unrestricted access to the *Catalog Manager* in System Roles (Manage Features > Catalog Manager Features).

Assessment workflows have permissions that determine which users can assign them (as described above) or edit them in the Assessment Workflow Manager.

To create or edit an Assessment Workflow, go to **Manage Center > Learning > Assessment Workflow Manager**.

Additional Information

Create an Assessment Workflow Template

Permissions

Create an Assessment Workflow Template

Course administrators can create an assessment workflow template to assign one or more pre- or post-course assessments to participants, instructors or direct appraisers. Participants and instructors access assessments from the course Knowledge Center. Direct appraisers access assessments from the Supervisor Assessments page.

To create an assessment workflow

1. Go to **Manage Center > Learning > Assessment Workflow Manager**. The Assessment Workflow Manager page opens, showing the existing workflow assessment templates.

2. Click **+ Create Assessment Workflow**. The page refreshes.

3. Enter a name for the assessment workflow template. This is the name shown in the Workflow Template drop-down lists when assigning a workflow template to a session, organization or logical domain.

4. Click the **Add exam/evaluation** link.

5. Click the **browse** icon to select an assessment. The Assessment selector opens in a new window.

6. Select whether the user will be notified to complete the assessment pre- or post-course.

7. Select the date from which the assessment will be available to the users. This is defined by the number of days before or after the course start or end date.

8. Select the recipient of the reminder email to complete the assessment. This can be course participants, instructors or the participants' direct appraisers.

9. Click the **browse** icon to select the email template used to send the reminder email. Reminder emails are sent only to users that have not completed the assigned exam or evaluation. Reminder emails are sent until the exam is completed or it is past the expiry date, whichever comes first.

10. Specify the frequency to send the reminder email after the date the assessment becomes available to access.

11. Repeat steps 4 to 10 to add more assessments to the workflow template.

12. Click **Save**.

13. Click **Permissions** to configure the assessment workflow template's access permissions. You must provide read-only access to administrators who you want to be able to assign the workflow template to sessions, organizations or logical domains.

Additional Information

Edit an Assessment Workflow Template

Permissions

Edit an Assessment Workflow Template

Course administrators can edit an assessment workflow template to update its pre- or post-course assessments, recipients, email reminder settings and access permissions. You can also delete assessment workflow templates.

To edit an assessment workflow template

1. Go to **Manage Center > Learning > Assessment Workflow Manager**. The Assessment Workflow Manager page opens, showing the existing workflow assessment templates.

2. Click the name of the workflow assessment template you want to edit or delete.

3. Edit the workflow assessment template properties as required. For more information, see Create an Assessment Workflow Template.

4. Click **Save**.

5. To delete the assessment workflow template, click **Delete**.

Additional Information

About Assessment Workflow Templates

Create an Assessment Workflow Template

About Class Resources

As a catalog administrator you can create resources that can be booked for classroom based training course sessions. Resources might include any materials needed by the instructor and participants for the training session, in addition to the room equipment.

You can book class resources when scheduling classroom sessions or when you book a training facility via the Resource Planner.

Class resources belong to a specific training center or facility, restricting them to a particular location.

You can create a list of recommended class resources for each classroom-based learning module. When you schedule classroom sessions, recommended class resources are automatically listed, to help you book resources more efficiently.

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

To manage class resources, go to **Manage Center > Learning > Class Resources**.

In the Class Resources page you can:

- Filter and sort the list of class resources

- Create a new class resource

- Edit class resource details

- View class resource event schedules (to see when they are booked)

- Create events for a class resource (a reservation or a new classroom training session)

- Delete class resources

Additional Information

Create a Class Resource

Edit a Class Resource

About Class Resource Attributes

Create an Event

View Event Schedules

About Recommended Class Resources

Create a Class Resource

Catalog administrators can create class resources which can then be booked by users with access to the training center.

To create a class resource

1. Go to **Manage Center > Learning > Class Resources**. The Class Resources page opens, showing existing resources.

2. Click **+ Create Resource**. The Create Resource page opens.

3. Enter the class resource details and click **Save**. The new class resource is added to the Class Resources list.

Additional Information

Class Resource Details

About Class Resources

Create an Event

View Event Schedules

Edit a Class Resource

Class Resource Details

Use the information in the table below to help you create or edit a class resource.

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

To manage class resources, go to **Manage Center > Learning > Class Resources**.

Table: Class Resource Details

Field	Description
Code	Enter a unique code for the resource. This field is mandatory.
Name	Enter a name for the resource to help identify what the resource is when scheduling it. This field is mandatory.
Image for class resource	To select an image for the resource, click the **browse** icon. The Repository Manager opens in a new window, from which you can select an image. If the image is larger than 150 x 150 pixels, you can scale it in the Image Editor.
Training Center	To restrict the resource to a specific training center, select it from the drop-down list.
Facility	To restrict the resource to a specific facility in the selected training center, select it from the drop-down list.
Resource Type	Select the type of resource from the drop-down list. If none of the predefined types accurately reflect the type of resource, select **Other**.
Serial Number	Enter the resource's serial number, if it has one. You can use serial numbers to keep track of multiple identical resources.
Description	Enter a description of the class resource. The description is one of the columns shown in the list of resources in the Class Resources page.
Quantity on Hand	Enter how many instances of this resource are available. This field is mandatory.
Pre Processing Time	Enter the number of days notice required before the resource can be booked. For example, if three days pre-processing time is required to book the resource, it cannot be scheduled within three days of creating the event. Pre-processing time might include transporting the resource from storage or another training location, for example.
Post Processing Time	Enter the number of days required to process the resource after the end of a scheduled event (for example, a classroom training session). The resource will not be available for booking for this number of days after its scheduled booking.

Additional Information

Create a Class Resource

Edit a Class Resource

About Class Resources

Edit a Class Resource

Catalog administrators can update class resource details and, optionally, create or edit an event for it. An event can be a date-specific reservation or a new learning module session.

To edit a class resource

1. Go to **Manage Center > Learning > Class Resources**. The Class Resources page opens, showing existing resources.

2. Click the name of the resource you want to edit, or select **Edit Resource Details** from its action menu. The Edit page opens.

3. Update the class resource details as required.

4. To create or edit an event for the resource, click the Schedule tab. Otherwise click **Save** to save your changes and return to the Class Resources list page.

Additional Information

Class Resource Details

Create a Class Resource

Create an Event

View Event Schedules

Edit an Event

About the Resource Planner

The Resource Planner displays the event schedules of facilities, instructors and resources. It helps you to plan and create resource bookings for classroom training sessions.

The Resource Planner shows event bookings on a grid, with a column for each date and a row for each resource. You can view the schedule on a daily, weekly or monthly basis.

Event blocks are displayed where:

- Facilities, instructors and class resources have been booked as part of a training event.

- Facilities, instructors and class resources have been booked directly (that is, reserved).

- There is a holiday associated with the training center to which the selected facilities or class resources belong.

In the Resource Planner you can:

- Select the facilities, instructors and resources whose schedules you want to view.

- Save selected facilities, instructors and resources as a preset, to make it easier to select them in future.

- Create events:

    - A new learning module session

    - A reservation for a facility or class resource

    - A personal event for an instructor (for example, non-working days)

- Edit events and drag them to new dates on the planner.

- Select the display fields for events on the planner.

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

To open the Resource Planner, go to **Manage Center > Learning > Resource Planner**.

Additional Information

Select Resources to Display

Edit a Resource Preset

Create an Event

Select Resource Display Fields

About Facilities

About Instructors

About Class Resources

Select Resources to Display

Catalog administrators can select the facilities, instructors and class resources to display in the Resource Planner. The selection remains in effect until you log out of the LMS. Catalog administrators can also save the selected facilities, instructors and class resources as a *resource preset*. This is useful if there are sets of resources that you or other administrators need to work with regularly. You can select a saved preset, instead of selecting the facilities, instructors and class resources separately each time.

Additional Information

Select Resource Display Fields

Select Resources Individually in the Resource Planner

Open a Resource Preset in the Resource Planner

About the Resource Planner

Edit a Resource Preset

Select Resource Display Fields

In addition to the name of the facilities, instructors and class resources, Catalog administrators can select other properties to display for each in the Resource Planner. Information that does not fit on one line in the planner's resources column is displayed as a tool tip when you move the pointer over the text.

To select the display fields

1. Go to **Manage Center > Learning > Resource Planner**. The Resource Planner opens. If there is no default resource preset the Resources dialog opens.

2. Click **Cancel** to close the Resources dialog.

3. Select **Display Fields** from the action menu above the planner. The Display Fields dialog opens.

4. Select the check boxes of the information you want to display for facilities, instructors and class resources where they appear in the left-most column in the planner.

5. To re-order the display fields, click and drag them up or down the list.

6. Click **Apply** to save your changes.

Additional Information

About the Resource Planner

Select Resources to Display

Select Resources Individually in the Resource Planner

Catalog administrators can select the facilities, instructors and class resources to display in the Resource Planner.

To select the resources individually to display in the Resource Planner

1. Go to **Manage Center > Learning > Resource Planner**. The Resource Planner opens. If there is no default resource preset the Resources dialog prompts you to enter or select the facilities, instructors and class resources you want to see in the planner's calendar. You can also select a non-default resource preset (see below).

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

3. Repeat step 2 for instructors and class resources, as required.

4. Click **Apply** to close the selection dialog and view the bookings in the Resource Planner.

5. Optionally, select **Save Resources as Preset** from the action menu above the planner.

Additional actions:

- To add more facilities, instructors or resources to the planner, use the selection control at the top-left of the planner.

- To remove a facility, instructor or class resource from the planner, click **Remove**.

- To pin a facility, instructor or class resource to the top of the list in the planner, click **Pin to Top**.

- To edit a facility or class resource, click its name in the list in the planner.

Additional Information

Open a Resource Preset in the Resource Planner

About the Resource Planner

Edit a Resource Preset

Open a Resource Preset in the Resource Planner

Catalog administrators can select the facilities, instructors and class resources to display in the Resource Planner.

To open a preset combination of facilities, instructors or resources

1. Go to **Manage Center > Learning > Resource Planner**. The Resource Planner opens. If there is no default resource preset the Resources dialog prompts you to enter or select the facilities, instructors and class resources you want to see in the planner's calendar.

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

3. To load a preset, select **Load** from its action menu and then click **OK** on the Confirmation dialog.

Additional actions:

- To add more facilities, instructors or resources to the planner, use the selection control at the top-left of the planner.

- To remove a facility, instructor or class resource from the planner, click **Remove**.

- To pin a facility, instructor or class resource to the top of the list in the planner, click **Pin to Top**.

- To edit a facility or class resource, click its name in the list in the planner.

Additional Information

Select Resources Individually in the Resource Planner

About the Resource Planner

Edit a Resource Preset

Edit a Resource Preset

You can edit a resource preset to change its name or select it as the default set of facilities, instructors and class resources to display in the Resource Planner. You cannot update the facilities, instructors and class resources in a preset, instead you can create a new preset and delete the original if it is no longer needed.

To edit a resource preset

1. Go to **Manage Center > Learning > Resource Planner**. The Resource Planner opens. If there is no default resource preset the Resources dialog prompts you to enter or select the facilities, instructors and class resources you want to see in the planner's calendar.

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

3. Select **Edit** from the action menu of the preset you want to edit. The Edit Preset Filter dialog opens and lists the facilities, instructors and class resources selected for the preset.

4. Edit the preset name as required. If you select the **Set as default** check box, the preset's facilities, instructors and resources are automatically displayed in the Resource Planner when you open it.

5. Click **Save**. The Edit Preset Filter dialog closes.

6. Repeat steps 3 to 5 for other presets as required.

7. To delete a preset, select **Delete** from its action menu.

8. Click **Done** to close the Resource Presets dialog and return to the Resource Planner.

Additional Information

About the Resource Planner

Select Resources to Display

Create an Event

You can create an event for a class resource, facility or yourself as an instructor, to make a booking for a specific date, or to create a new training session and schedule the resource, facility and instructor required for it. You can create and view events in the Schedule tab for the resource, facility or instructor, or in the Resource Planner. Scheduled events are displayed as blocks in a calendar, with hatched blocks representing processing time for class resources, if configured.

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

After creating a new learning module session event, you can open the session in the Catalog Editor for further editing from the Create Event dialog.

To create an event for a class resource, facility or instructor

1. Go to one of the following pages:

    -   **Manage Center > Learning > Class Resources**

    -   **Manage Center > Learning > Facilities**

    -   **Manage Center > Learning > Instructors**

2. Click the name of the resource, facility or instructor you want to create an event for and then click **Schedule**. Alternatively, select **View Schedule** from its action menu. The Schedule tab opens.

3. Click **+ Create Event**, or click on a white space on the calendar. The Create Event dialog opens.

4. Select the type of event to create: a module classroom session or a class resource, facility or instructor booking.

5. Click **Continue**.

6. Enter the event details.

7. Click **Continue**.

8. If the facility, instructors and resources required for your event are available, click **Continue**. Otherwise, click **Back** to select alternative resources or dates.

9. For module session events select any save options as appropriate. For example, if the event is a module session, has a future start date and learners showing interest in the course, you can choose whether to send New Sessions Available Notifications.

10. Click **Book**. The dialog shows a summary of the event booking.

11. Click **Close**. The new event is added to the schedule for the resource.

To create an event from the Resource Planner

1. Go to **Manage Center > Learning > Resource Planner**. The Resource Planner opens.

2. If there is no default resource preset and the Resources dialog opens, select the resources to display in the planner, or click **Cancel** to not show any bookings in the calendar.

3. Complete steps 3 to 11, above.

Additional Information

About Class Resources

Edit a Class Resource

About Facilities

Edit a Facility

About Instructors

About the Resource Planner

Edit an Event

Drag and Drop Event Editing

Edit an Event

You can edit an event from the facility, instructor or resource Schedule tab, or from the Resource Planner. You edit event details in the event dialog used to create events. You can also drag and drop module session events on the calendar, adjusting the event duration, as long as you have unrestricted access permission.

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

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

To edit event chips in the Resource Planner, you must have a system role with unrestricted access to the *Resource Planner* feature in System Roles (Manage Features > Catalog Manager Features).

To edit an event

1. Go to one of the following pages:

    - **Manage Center > Learning > Class Resources**

    - **Manage Center > Learning > Facilities**

    - **Manage Center > Learning > Instructors**

2. Click the name of the resource, facility or instructor you want to edit an event for and then click the **Schedule** tab. Alternatively, select **View Schedule** from its action menu. The Schedule tab opens.

3. To locate the event on the calendar you can select a date from the calendar drop-down, or click **Today**, or click the chevrons either side of the date range above the calendar.

4. Click the event on the calendar. The Schedule Details dialog opens.

5. Click **Edit**. The Edit Event dialog opens.

6. Update the event details as required and then click **Continue**.

7. If the facility, instructors and resources required for your event are available, click **Continue**. Otherwise, click **Back** to update the event details.

8. If the changes need to be reviewed before saving the event, select the **Mark this change as draft** check box.

9. Click **Book** to finish editing the event. The event details are summarized in the Edit Event dialog.

10. Click **Close**.

Additional Information

[Drag and Drop Event Editing](#)

Review Event Changes

Create an Event

Drag and Drop Event Editing

You can drag-and-drop editable event chips in the Resource Planner to update a schedule directly. However, holidays, enrollments, and read-only events cannot be edited in this way. If the event is a module session, you can mark the change as draft, to be saved once all rescheduled items have been reviewed. (This feature is more for you to reschedule multiple items and save them together rather than have another administrator review your changes). An event with draft changes to be reviewed has a dashed left border on the calendar instead of a solid one.

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

To edit event chips in the Resource Planner, you must have a system role with unrestricted access to the *Resource Planner* feature in System Roles (Manage Features > Catalog Manager Features).

To open the Resource Planner, go to **Manage Center > Learning > Resource Planner**.

To reschedule events in the Week view or Month view

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

2. Click **Book** to confirm the change of schedule.

3. If the event is a module session, select the **Mark change as draft** check box, if it needs to be reviewed.

4. Click **Close** to close the Edit Event dialog. The event is moved to the new day.

To edit an event start time in the Day view

1. Drag the event to change its start time. The Edit Event dialog opens.

2. Click **Book** to confirm the change of start time.

3. If the event is a module session, select the **Mark change as draft** check box, if it needs to be reviewed.

4. Click **Close** to close the Edit Event dialog. The event is moved to the new time slot.

To edit the duration of an event in the Day view

1. Resize the event block to increase or decrease its duration. The Edit Event dialog opens.

2. Click **Book** to confirm the change of duration.

3. If the event is a module session, select the **Mark change as draft** check box, if it needs to be reviewed.

4. Click **Close** to close the Edit Event dialog. The event is updated to the new duration.

Additional Information

About the Resource Planner

Edit an Event

Create an Event

Review Event Changes

View Event Schedules

Catalog administrators can view scheduled events for class resources, facilities and instructors in the Schedule tab of each, or in the Resource Planner. Bookings are displayed as blocks in a calendar with hatched blocks representing processing time for resources, if configured.

If there are draft changes to events in the calendar, administrators can review them. The draft changes can be saved or discarded.

To view the schedule for a class resource, facility or instructor

1. Go to one of the following pages:

    - **Manage Center > Learning > Class Resources**

    - **Manage Center > Learning > Facilities**

    - **Manage Center > Learning > Instructors**

2. Click the name of the resource, facility or instructor you want to view the schedule for and then click **Schedule**. Alternatively, select **View Schedule** from its action menu. The Schedule tab opens.

3. To change the date range shown in the calendar, select a date from the calendar drop-down, or click **Today**, or click the chevrons either side of the date range above the calendar.

4. To view or edit event details, click the event in the calendar.

Additional Information

[Edit an Event](#)

[Create an Event](#)

[Review Event Changes](#)

Review Event Changes

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

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

To review draft event changes from the Schedule tab

1. Go to one of the following pages:

    - **Manage Center > Learning > Class Resources**

    - **Manage Center > Learning > Facilities**

    - **Manage Center > Learning > Instructors**

2. Click the name of the resource, facility or instructor you want to review the draft event changes for and then click **Schedule**. Alternatively, select **View Schedule** from its action menu. The Schedule tab opens.

3. To locate the event on the calendar you can select a date from the calendar drop-down, or click **Today**, or click the chevrons either side of the date range above the calendar.

4. Click **Review Changes**. The Review Changes dialog opens, where you can check the event details.

5. To accept and save the changes, click **Save All Changes**. The dialog shows the event summary information and the session associated with the event is saved.

6. To discard the draft event changes, click **Close** to close the Review Changes dialog, and on the Schedule tab click **Reset Changes**. You are asked to confirm this action.

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

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

2. To locate one or more events on the calendar you can select a date from the calendar drop-down, or click **Today**, or click the chevrons either side of the date range above the calendar.

3. Complete steps 4 to 6, above.

Additional Information

Edit an Event

About the Resource Planner

About Class Resource Attributes

As a catalog administrator you can create class resource attributes to capture the general properties applicable to class resources. For example, projectors may have different input options, such as VGA, DVI-D and HDMI. The input types available on each projector can be specified with a check box class resource attribute for each input type.

Class resource attributes can be one of the following data types:

- Free text (a single line of text up to 255 characters)

- Text area (multiple lines of text)

- Drop-down (select the value from a list)

- Numeric (In PeopleFluent Learning versions up to and including 21.04, fractional numbers less than *1* must start with a zero; for example, 0.75, not .75).

- Check box

- Date (a calendar tool to select a date)

You assign values to class resource attributes when creating or editing class resources.

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

To manage class resource attributes go to **Manage Center > Learning > Class Resources Attributes**.

From the Class Resource Attributes page you can create, edit and delete class resource attributes.

Additional Information

Create a Class Resource Attribute

Edit a Class Resource Attribute

Class Resource Attribute Reference

About Class Resources

Create a Class Resource Attribute

Catalog administrators can create a class resource attribute and specify the areas of the LMS where the attribute information is shown to administrators and learners.

To create a class resource attribute

1. Go to **Manage Center > Learning > Class Resource Attributes**. The Class Resource Attributes page opens, listing those already defined.

2. Click **+ Create Class Resource Attribute**. The Create Class Resource Attribute page opens.

3. Enter the attribute details and select its display area settings.

4. Click **Save**. The class resource attribute is added to the list in the Class Resource Attributes page, and is available for all class resources.

Additional Information

About Class Resource Attributes

Class Resource Attribute Reference

About Class Resources

Edit a Class Resource Attribute

Catalog administrators can edit or delete class resource attributes.

ⓘ There are restrictions on the attribute type you can select if you need to change it. For more information, see Class Resource Attribute Reference.

To edit a class resource attribute

1. Go to **Manage Center > Learning > Class Resource Attributes**. The Class Resource Attributes page opens, listing those already defined.

2. Click the name of the attribute you want to edit, or select Edit from its action menu. The Edit Class Resource Attribute page opens.

3. Update the attribute details and display area settings as required.

4. Click **Save**. The class resource attribute is added to the list in the Class Resource Attributes page, and is available for all class resources.

Additional Information

About Class Resource Attributes

Class Resource Attribute Reference

About Class Resources

Class Resource Attribute Reference

Use the information in the table below to help you create or edit class resource attributes.

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

To manage class resource attributes, go to **Manage Center > Learning > Class Resource Attributes**.

Table: Class resource attribute field descriptions

Field	Description
Attribute Code	Enter a unique attribute code for the attribute.
Name	Enter a descriptive name for the attribute. For multi-language systems, you can enter the text label key and the LMS will automatically display the translated label value.
Type	Select the attribute's data type from the drop-down list. This determines the types of values that can be assigned to the attribute.
Resource Type	Select one or more check boxes to specify the type of resource the attribute applies to.
Display Areas	Select one or more check boxes to specify where the attribute is shown to administrators and learners in the LMS: • Class Resource Filter—Enables you to filter the list of class resources by the attribute in the Class Resources page. • Class Resource Column—Adds a column to the Class Resource page so that you can see at-a-glance the attribute's value for each resource. • Summary Overlays—Accessed in the Resource Planner, Catalog Editor and Class Resource selector. • Catalog Editor Recommended Class Resources

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.

Additional Information

About Class Resource Attributes

Create a Class Resource Attribute

Edit a Class Resource Attribute

About the Class Resource Calendar

The Class Resources Calendar shows the scheduled bookings for selected facilities, instructors and class resources. Catalog administrators can create and edit booking events for facilities and class resources in the calendar.

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

To open the Class Resources Calendar go to **Manage Center > Learning > Class Resource Manager**.

Additional Information

Select Resource Bookings to Display

Book a Facility

Book a Class Resource

Select Resource Bookings to Display

Administrators can select the facilities, instructors and class resources to display in the Class Resource Calendar.

To select the resources individually to display in the Class Resource Calendar

1. Go to **Manage Center > Learning > Class Resource Calendar**. The Class Resource Calendar opens with a blank calendar for the current month and year.

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

3. Repeat step 2 for instructors and class resources, as required.

4. Click **Search** to view the scheduled bookings for the selected facilities, instructors and class resources.

5. Move the pointer over a booking for more information about it.

Additional Information

About the Class Resource Calendar

Book a Facility

Book a Class Resource

Book a Facility

Catalog administrators can book a facility from the Class Resource Calendar to reserve it for a future event. This could be for a classroom-based course that has yet to be configured in the LMS, for example.

When you book a facility a scheduled event is created for it, which is shown in the Resource Planner and Class Resource Calendar when the facility is selected for display. The facility's bookings are also shown in its Schedule tab in the Facilities page.

To book a facility from the Class Resource Manager

1. Go to **Manage Center > Learning > Class Resource Manager**. The Class Resource Calendar opens with a blank calendar.

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

3. Click **+ Book Facility**. The Create Booking dialog opens.

4. Enter or select the **Facility Name** you want to book (see step 2).

5. You must also complete the **Booker**, **Title**, **Start Time** and **End Time** fields.

6. Optionally, add a comment about the booking.

7. Click **Book It** to save the booking.

Additional Information

About the Class Resource Calendar

Book a Class Resource

Book a Class Resource

Catalog administrators can book a class resource from the Class Resource Calendar to reserve it for a future event. This could be for a classroom-based course that has yet to be configured in the LMS, for example.

When you book a resource a scheduled event is created for it, which is shown in the Resource Planner and Class Resource Calendar when the resource is selected for display. The resource's bookings are also shown in its Schedule tab in the Class Resources page.

To book a resource from the Class Resource Manager

1. Go to **Manage Center > Learning > Class Resource Manager**. The Class Resource Calendar opens with a blank calendar.

2. Optionally, to show existing bookings for the resource, start typing its name in the Resources text box and then select it from the auto-complete suggestions. Alternatively, click the **browse** icon to open the Resources Selector, where you can select one or more resources.

3. Click **+ Book Resource**. The Book Resource dialog opens.

4. Enter or select the **Resource Name** you want to book (see step 2).

5. You must also complete the Quantity, **Title**, **Booker**, **Start Time** and **End Time** fields.

6. Optionally, add a comment about the booking.

7. Click **Submit** to save the booking.

Additional Information

About the Class Resource Calendar

Book a Facility

About Holiday Calendars

Holiday calendars define the days when administrators should not schedule events for training centers, instructors or class resources. Administrators can configure multiple holiday calendars, each with their own set of holidays and linked training centers. If your organization runs classroom training sessions in multiple countries, you may wish to configure a holiday calendar for each country.

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

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

To manage holiday calendars, go to **Manage Center > Learning > Holiday Calendars**.

Additional Information

Create a Holiday Calendar

Edit a Holiday Calendar

Link a Training Center to a Holiday Calendar

Create a Holiday Calendar

Catalog administrators can create a holiday calendar, add holiday dates and link one or more training centers to it.

To create a holiday calendar

1. Go to **Manage Center > Learning > Holiday Calendars**. The Holiday Calendars page opens, listing the first 10 holiday calendars by default.

2. Click **+ Create Holiday Calendar**. The New Calendar page opens.

3. Click the **[Edit]** link to rename the calendar.

4. Click **+ Add Holiday** to add a holiday to the calendar. The Add Holiday dialog opens.

5. Enter a descriptive name for the holiday (for example, Spring Bank Holiday), select the date of the holiday and then click **Save**.

6. Repeat steps 4 and 5 to add more holidays to the calendar.

7. Click **Back** to return to the list of holiday calendars, or click **Training Centers** to link a training center to the holiday calendar.

Additional Information

Link a Training Center to a Holiday Calendar

About Holiday Calendars

Edit a Holiday Calendar

About Training Centers

Edit a Holiday Calendar

Catalog administrators can edit a holiday calendar to change its name, add or remove holiday dates, and link or unlink training centers. Catalog administrators can also delete holiday calendars.

To edit a holiday calendar

1. Go to **Manage Center > Learning > Holiday Calendars**. The Holiday Calendars page opens, listing the first 10 holiday calendars by default.

2. Click the name of the holiday calendar you want to edit, or select **Edit** from its action menu. The Holiday Calendar page opens on the Details tab.

3. Optional steps:

    - Click **+ Add Holiday** to add one or more holidays to the calendar.

    - Select **Edit** from a holiday's action menu to edit its name or date.

    - Select **Delete** from a holiday's action menu to delete it.

    - Click the **Training Centers** tab to link or unlink training centers.

Additional Information

About Holiday Calendars

Create a Holiday Calendar

Link a Training Center to a Holiday Calendar

About Training Centers

Training centers represent a physical location with associated collections of facilities and rooms. Catalog administrators can associate a map with a training center, which learners can download from the LMS (for example, in the Knowledge Center).

Catalog administrators can also associate a training center with a holiday calendar, which can be used to determine when the training center is unavailable.

When you configure the class schedule for a classroom session, selecting a training center enables you to book the facilities available there, and see any non-available dates defined in the holiday calendar. Shared resources can be added from other training centers also, not just the one where the classroom training is taking place.

Like other LMS objects, training centers have permissions that determine who can view and edit them. To manage training centers, your user role must have unrestricted access to the *Class Resource Manager* feature in System Roles (Manage Features > Catalog Manager Features).

To manage training centers, go to **Manage Center > Learning > Training Centers**, where you can create, edit, delete and set access permissions for training centers. You can only edit and set permissions for training centers you have created or for which you have unrestricted access.

Additional Information

Create a Training Center

About Facilities

About Holiday Calendars

About Class Resources

Create a Training Center

Training centers are used for classroom-based courses. Catalog administrators can create a training center and then associate class resources and facilities with it.

To create a training center

1. Go to **Manage Center > Learning > Training Centers**. The Training Centers page opens and lists the existing training centers.

2. Click **+ Create Training Center**. The Create Training Center page opens.

3. Enter the training center's name. This field is mandatory.

4. Enter the remaining properties, which are not—with the exception of the map—shown to learners.

5. To provide learners with a map of the training center, click the **browse** icon. The Repository Manager opens in a new window. Navigate to the map file and click **Select** to select the map. The Repository Manager closes.

6. To configure access permissions for the training center, click **Permissions**. The Permissions Selector opens in a new window. Configuring the permissions and click **OK** to close the Permission Selector.

7. Click **Save**.

Additional Information

Link a Training Center to a Holiday Calendar

About Training Centers

About Holiday Calendars

About Facilities

About the Repository Manager

Permissions

Link a Training Center to a Holiday Calendar

Administrators can link one or more training centers to a holiday calendar to help course administrators plan scheduled events for training centers and their resources.

To link a training center to a holiday calendar

1. Go to **Manage Center > Learning > Holiday Calendars**. The Holiday Calendars page opens, listing the first 10 holiday calendars by default.

2. Click the name of the holiday calendar you want to link a training center to, or select **Edit** from its action menu. The Holiday Calendar page opens on the Details tab.

3. Click the **Training Centers** tab. The first 10 training centers linked to the holiday calendar are shown in the list by default.

4. Click **Link Training Center**. The Training Center selector opens.

5. Select the training centers to link to the holiday calendar and click **Save**. The training centers are added to the list in the Training Center tab.

6. Optional steps:

   • Click **Back** to return to the Holiday Calendars page.

   • Click the name of the training center to edit it in the Edit Training Center page.

   • Select **Unlink** from a training center's action menu to unlink it from the holiday calendar.

Additional Information

About Holiday Calendars

Create a Holiday Calendar

About Training Centers

About Facilities

Facilities in the LMS represent rooms at training centers, for which you can specify the location, the seating arrangements, and audio and video equipment available.

As a catalog administrator, you associate a facility with a training center, so that when you configure the class schedule for a classroom training session, selecting a training center enables you to book the facility. You can manually specify whether a facility is available to book by setting its status. All facilities associated with a training center are subject to its holiday calendar.

You can attach a map to a facility, which learners can download from the Knowledge Center or other pages from which learners can access the Facility Directions page. This page also includes the contact details and directions for the facility if they have been specified.

When you edit a facility you can open its schedule to see when it has been booked for and for which courses. You can then edit any class schedules for which it has been booked, or open the corresponding learning module session in the Catalog Editor. You can also create a new schedule event to book the facility. The new event can be linked to a session's class schedule, or you can book the facility by itself.

Facilities do not have their own access permissions. To manage facilities, your user role must have unrestricted access to the *Class Resource Manager* feature in System Roles (Manage Features > Catalog Manager Features).

To manage facilities, go to **Manage Center > Learning > Facilities**, where you can search for, create, edit, and delete facilities.

Additional Information

Create a Facility

Edit a Facility

About Training Centers

About Holiday Calendars

Create a Facility

Facilities in the LMS represent rooms at training centers, for which you can specify the location, the seating arrangements, and audio and video equipment available.

Once you have created and saved a facility, you can create an event for it, which can be a new learning module session or a simple booking reservation.

To create a facility

1. Go to **Manage Center > Learning > Facilities**. The Facilities page opens and lists the existing Facilities by Venue Name and Facility Code.

2. Click **+ Create Facility**. The Create Facility page opens.

3. Enter the Facility Code, which is used to uniquely identify the facility. It can include spaces. This field is mandatory.

4. Select the training center where the training facility is located. If the facility is not in a training center, you can enter a Location and leave the Training Center as *Default*.

5. If the facility is available for booking immediately, select **Available** from the Status drop-down list. Otherwise, select **Not Available**.

6. Select the type of facility from the Category drop-down list.

7. Enter the Venue name. This is shown with the Facility Code where the facility is referenced in the Knowledge Center and class session. This field is mandatory.

8. Enter the Contact Info and Directions for the facility. These are shown to learners when they select the facility in the Knowledge Center.

9. To provide learners with a map of the facility, click the **browse** icon. The Repository Manager opens in a new window. Navigate to the map file and click **Select** to select the map. The Repository Manager closes.

10. Select and enter the information about Room Equipment.

11. Click **Save**.

Additional Information

About Facilities

About Training Centers

About the Repository Manager

Create an Event

View Event Schedules

Edit a Facility

Edit a Facility

Catalog administrators can update the facility details and, optionally, create or edit an event for it. An event can be a date-specific reservation or a new learning module session.

To edit a facility

1. Go to **Manage Center > Learning > Facilities**. The Facilities page opens, showing existing facilities.

2. Click the name of the facility you want to edit, or select **Edit Details** from its action menu. The Edit page opens.

3. Update the facility details as required.

4. To create or edit an event for the facility, click the **Schedule** tab. Otherwise click **Save** to save your changes and return to the Facilities list page.

Additional Information

About Facilities

Create a Facility

Create an Event

Edit an Event

About Instructors

Administrators can create instructors and assign to them one or more courses they are qualified to teach. You can also auto-populate the instructor list with LMS users who are currently assigned as instructors for classroom sessions.

Having an up-to-date list of instructors and their qualified courses enables you to create scheduled events, such as new classroom sessions, and assign the qualified instructors to them. You can assign instructors to a session from the Catalog Editor, Resource Planner, and from the Schedule tab of the Instructor detail page.

Instructors are defined by the courses they are qualified to teach. You can remove instructors from the list by editing their qualified courses.

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

To manage instructors go to **Manage Center > Learning > Instructors**.

From the Instructors page you can:

- Create an instructor

- Auto-populate instructors

- View an instructor's profile

- Edit an instructor's qualified courses

- View an instructor's schedule, and create or edit events

- Filter the list of instructors by qualified course

Additional Information

Create an Instructor

Auto-populate Instructors

Edit an Instructor's Qualified Courses

View Event Schedules

Create an Instructor

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

> ⓘ The LMS comes with an Instructor role out of the box, which enables access to the functions relating to classroom based training. These include:
>
> - Reviewing session participants
>
> - Maintaining attendance sheets
>
> - Sharing files in the Knowledge Center
>
> - Enrolling learners in sessions
>
> Selecting an LMS user to be an instructor does not automatically enable them to access these functions. They must have a primary or additional role that grants access to them (for example, the default Instructor role). User administrators can assign roles to users in the User Editor.

To create an instructor

1. Go to **Manage Center > Learning > Instructors**. The Instructors page opens, listing the first 10 instructors by default.

2. Click **+ Create Instructor**. The Create Instructor dialog opens.

3. Click the **browse** icon to select an LMS user to be the instructor. The Instructor selector opens in a new window.

4. Click the **browse** icon to select the course that the new instructor is qualified to teach. The Course selector opens in a new window.

5. Click **Create**. The instructor is added to the list on the Instructors page.

Additional Information

About Instructors

Auto-populate Instructors

Edit an Instructor's Qualified Courses

Create an Event

View Event Schedules

Auto-populate Instructors

Catalog administrators can auto-populate the list of instructors based on current instructor assignments for all classroom training sessions.

To auto-populate instructors

1. Go to **Manage Center > Learning > Instructors**. The Instructors page opens, listing the first 10 instructors by default.

2. Click **Auto-Populate**. The Auto-Populate dialog opens, explaining how the instructors and their qualifications are added to the list.

3. Click **Auto-Populate**. The LMS searches through all current course instructor assignments to populate the qualified course list for each instructor. The dialog updates to show the number of instructor qualifications that were added.

4. Click **OK** to close the Auto-Populate dialog. The Instructors list is updated based on current instructor assignments.

Additional Information

About Instructors

Create an Instructor

Edit an Instructor's Qualified Courses

View Event Schedules

Edit an Instructor's Qualified Courses

Course administrators can edit the list of courses an instructor is qualified to teach. Adding courses the instructor is newly qualified to teach, or removing those they are no longer teaching, helps to ensure other course administrators assign appropriate instructors to classroom sessions.

If you delete all courses for an instructor, the instructor is no longer qualified to teach any courses and therefore they are not included in the Instructors page.

To edit an instructor's qualified courses

1. Go to **Manage Center > Learning > Instructors**. The Instructors page opens, listing the first 10 instructors by default.

2. Select **Edit Qualified Courses** from the instructor's action menu. Alternatively, click the name of the instructor to view their profile and then select the **Qualified Courses** tab. The Qualified Courses tab lists the learning modules they are qualified to teach.

3. To add a qualified course for the instructor, click **+ Add Qualified Course**. The Course selector opens in a new window.

4. To delete a course from the list, select **Delete** from its action menu. After confirming the deletion the course is removed from the list.

Additional Information

About Instructors

Create an Instructor

Auto-populate Instructors

About Importing Courses

Course administrators can create, update and delete learning modules and sessions by using the import functions in the Manage Center. For example, you can import individual courses on an ad hoc basis, or bulk import multiple courses at once by compressing them into a single ZIP file. With the Course CSV Loader you can also update learning modules whether they were created in the Catalog Editor or from imported course packages.

When you import courses into the LMS you can record and track enrollments, learner progress, assessment scores and other administrative data according to each course's data model and communications standards.

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

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

- SCORM

- xAPI (also known as Experience API or Tin Can API)

- CMI5 (only available when importing to Rustici Engine)

- AICC

You will need to know which standard your courses use.

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

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

- Import new course content packages (including CMI5-based courses) into Rustici Engine

- Migrate existing courses to use the Rustici Engine launch interface.

- Migrate course revisions to the Rustici Engine for courses originally loaded to the original native LMS SCORM engine.

- Preview courses that have changed their launch interface to Rustici Engine.

For more information about the benefits of using Rustici Engine, and each standard, see the Rustici Software website. For more information about importing content packages and revisions into Rustici Engine, and migrating existing courses to Rustici Engine, see About Rustici Engine.

Content Packages with Non-English File Names

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

Additional Information

About Rustici Engine

Import a Content Package

Import Multiple Content Packages

Import a Module Revision

Import Courses with the Course CSV Loader

Delete Learning Modules Matching Content Packages

Import AICC Course Structures

Import Programs with the Program CSV Loader

About Importing Module Revisions

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

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

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

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

You can select the following types of content to import:

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

Additional Information

Import a Module Revision in the Catalog Editor

Import a Module Revision in the Import Content Package Wizard

Revisions and Launch Preview

Import a Content Package

Import AICC Course Structures

Import Courses with the Course CSV Loader

About Rustici Engine

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

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

- Import new course content packages (including CMI5-based courses) into Rustici Engine

- Migrate existing courses to use the Rustici Engine launch interface.

- Migrate course revisions to the Rustici Engine for courses originally loaded to the original native LMS SCORM engine.

- Preview courses that have changed their launch interface to Rustici Engine.

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

Importing CMI5 Courses to Rustici Engine

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

Error Message Translation

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

The following error messages are translated for import errors:

- Failed to create Learning Module [CourseId] for Rustici Engine

- Error in importing course to Rustici Engine [CourseId]

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

- Failed to acquire Engine config properties; these are necessary to work with Engine content. [engineCourseId, transcriptId]

- Unhandled Exception upon Launch of Engine course [engineCourseId, transcriptId]

Additional Information

Migrate a Course to Rustici Engine

About Importing Courses

Import a Content Package

Course administrators can import individual course content packages or multiple content packages by combining them into a single ZIP file. After a successful import, you can further configure the course as a learning module in the Catalog Editor or via the Course CSV Data Loader.

To import a content package

1. Go to **Manage Center > Learning > Import > Import content package**. The Import Content Package page opens.

2. Click **Choose File** to select the content package to import, and then click **Next**.

3. Enter a new Module ID if required.

   For SCORM compliant packages, the Module ID that the LMS will use to identify the course defaults to the <manifest> element's identifier attribute in the manifest file (used to identify SCORM packages). You can change the Module ID to fit your organization's naming conventions. Module IDs cannot contain spaces.

4. To assign the imported course to one or more catalogs, select the **Update catalog setting** check box, and then click the **Assign catalog** link to select the catalog(s).

5. To show the course to learners when they search or browse catalogs, select the **Show in catalog** check box.

6. To track learner activity for the course with Rustici Engine, select the **Use Rustici Engine** check box, if available. Otherwise the native LMS SCORM engine is used.

7. Click **Import as New Bundle**.

8. Select the course language from the drop-down list.

9. Enter a Module Title to override the default.

10. Click **Next**. The Module Created page summarizes the course information you entered on the previous pages.

11. To configure the course as a learning module in the Catalog Editor, click **Open Catalog Editor**. To import another content package, click **Import New Content Package**.

Additional Information

Import Multiple Content Packages

Import a Module Revision

About Rustici Engine

Import Multiple Content Packages

Course administrators can import multiple new course packages at once by compressing them into a single ZIP file. As each courseware package is itself a ZIP file containing the files comprising the course, you are packaging multiple ZIP files into a single ZIP file.

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

> ⓘ You cannot upload new versions of existing courses by combining them into a single ZIP file. The batch upload process will fail.

To import multiple content packages at once

1. Create a single ZIP file containing your courseware packages.

   In Windows Explorer or MacOS Finder, select all of the courseware packages you want to include in the import.

   - In Windows right-click the highlighted files and select **Send to > Compressed (zipped) folder** from the popup menu.

   - In MacOS right-click (or Ctrl-click) the highlighted files and select **Compress** from the shortcut menu.

2. Go to **Manage Center > Learning > Import > Import content package**. The Import Content Package page opens.

3. Click **Choose File** to select the content package to import, and then click **Next**. The course packages present in the ZIP file are summarized in the Batch Update Options page. The courses' Title values are copied from the <manifest> element's **identifier** attribute in each package's manifest file.

4. To import the course packages, leave the **Import courses** option selected.

5. Select an option to specify how the LMS selects IDs for the courses in the package:

   - Select **Use IDs specified in the course descriptions** to set the learning module IDs to the Title (manifest identifier) of the corresponding course content package.

   - Select **Use the base file names of the source files** to set the imported courses learning module IDs to the file names of the content packages in the ZIP file. The course content package file names cannot contain spaces.

6. Optionally, enter a prefix for the learning module IDs created from the imported content packages.

7. Click **Next**.

8. Select the language for the course modules from the drop-down list. If you are importing a package containing more than one course, you select the primary language from the drop-down list.

9. To assign the imported courses to one or more catalogs, select the **Update catalog setting** check box, and then click the **Assign catalog** link to select the catalog(s).

10. To show the courses to learners when they search or browse catalogs, select the **Show in catalog** check box.

11. Click **Read Access** and **Write Access** to set the access permissions on the imported learning modules.

12. Click **Import**. When the import process has completed, the Batch Import Summary page lists the courses and their import status.

Additional Information

Batch Import Summary

Delete Learning Modules Matching Content Packages

Permissions

Batch Import Summary

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

The Course column shows, for each course, the module title, taken from the <title> element of the first <organization> element in the manifest file, and the unique manifest identifier.

The Status column shows, for each course, whether the course was imported successfully or not, and the module ID, which is derived from either the manifest identifier or the content package file name, depending on the module ID option you choose for import (use IDs specified in the course descriptions, or base the IDs on the file names of the source files).

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

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

Additional Information

Import a Content Package

Delete Learning Modules Matching Content Packages

Course administrators can use the Import content package feature to delete LMS learning modules with Module IDs matching the Title (that is, manifest identifier) in the course content packages you select for import. You can delete a single learning module by selecting a content package containing a single course, or delete multiple learning modules by selecting a ZIP file containing multiple content packages.

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

To delete learning modules using the Import content package feature

1. Create a single ZIP file containing the content packages you want to delete from the LMS as learning modules.

2. Go to **Manage Center > Learning > Import > Import content package**. The Import Content Package page opens.

3. Click **Choose File** to select the content package, and then click **Next**. The course packages present in the ZIP file are summarized in the Batch Update Options page. The courses' Title values are copied from the <manifest> element's **identifier** attribute in each package's manifest file.

4. Select the **Delete existing modules** option.

5. Select **Use IDs specified in the course descriptions**.

6. If you the courses you want to delete were previously imported with a prefix, you will need to enter the prefix to identify them for deletion.

7. Click **Next**.

8. Click **Delete**. The Batch Delete Summary page lists the courses in the imported content package and the deletion status of any corresponding learning modules in the LMS.

Additional Information

Import Multiple Content Packages

Import a Module Revision in the Catalog Editor

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

To import a course revision in the Catalog Editor

1. Go to **Manage Center > Learning > Learning Modules** and select the module to update. The Catalog Editor opens at the Define Module Properties page.

2. Click **Revisions and Launch Preview** in the Module Properties tab. The Revisions and Launch Preview page lists the revisions for the module.

3. Select the type of import from the +Import New Revision drop-down list. Each type of import requires different parameters.

4. In the Confirm New Module Revision page select who to make the new revision available to. The default options for new module revisions are to make it available to learners who have not yet been enrolled and to learners who have been enrolled but have not yet started it.

5. Click **Publish**. A message is displayed confirming the course revision has been created.

6. To Preview the new course revision, click **Preview**.

Additional Information

About Importing Module Revisions

Import a Module Revision in the Import Content Package Wizard

About Revisions and Launch Preview

Approve a Module Revision

Make a Preview Revision Available to Learners

Import a Module Revision in the Import Content Package Wizard

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

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

1. Go to **Manage Center > Learning > Import > Import content package**.

2. In the Select a Package page, click **Choose File** to select the content package to import, and then click **Next**.

3. To update an existing course, enter its Module ID. This might be the default value imported from the manifest file, or it might be an ID specified by your organization. The LMS automatically detects whether a Module ID matches an existing course.

4. To assign the imported course revision to one or more catalogs, select the **Update catalog setting** check box, and then click the **Assign catalog** link to select the catalog(s).

5. To remove the course from its assigned catalog(s), click the **Remove assigned catalog(s)** link.

6. To show the course to learners when they search or browse catalogs, check the **Show in catalog** check box. If you leave this check box cleared, the course will not be shown to learners.

7. When you import course packages you select the language of the course you are creating or updating:

   - If you are updating an existing course and the new version is the same language, click **Update Existing Bundle Revision**.

   - If you are updating an existing course with a new version in a different language, click **Import As New Bundle**.

8. Select the language of the course you are updating from the Language drop-down list.

9. Change the module title, if required, and click **Next**.

10. In the Confirm New Module Revision page select who to make the new revision available to. The default options for new module revisions are to make it available to learners who have not yet been enrolled and to learners who have been enrolled but have not yet started it.

    You can preview revisions to test them before making them available to learners. To import a revision for previewing, select **For previewing purposes only**.

11. Click **Publish**. A message is displayed confirming the course revision has been created.

Additional Information

About Importing Module Revisions

Import a Module Revision in the Catalog Editor

About Revisions and Launch Preview

Approve a Module Revision

Make a Preview Revision Available to Learners

Import AICC Course Structures

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

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

- An assignable unit (.AU) file

- A course (.CRS) file

- A course structure (.CST) file

- A descriptor (.DES) file

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

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

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

To import an individual AICC course

1. Go to **Manage Center > Learning > Import > Import AICC course structure**. The Import AICC course structure page opens.

2. Choose each AICC file and then select the appropriate character encoding from the Encoding drop-down list.

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

3. Click **Next**.

4. To assign the imported course to one or more catalogs, select the **Update catalog setting** check box, and then click the **Assign catalog** link to select the catalog(s).

5. To show the course to learners when they search or browse catalogs, select the **Show in catalog** check box.

6. Click **Import as New Bundle**.

7. Select the course language from the drop-down list.

8. Enter a Module Title to override the default.

9. Click **Next** to complete the import process.

Additional Information

About Importing Courses

About the Course CSV Loader

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

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

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


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

You do not need to add values for every heading to import a Course CSV file, but certain fields must have values, depending on the action and learning module type. You can continue to configure learning modules created or updated from a CSV import in the Catalog Editor.

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

- Action
- ModuleID
- ModuleLearningType

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

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

Preparing CSV Files for Import

To prepare a Course CSV file for import, you can download a template CSV file from the Course CSV Loader page and populate the fields as required, or you can run report R246 or R247 to export one or more courses to a CSV file and update the field values. The CSV file template you download from the Course CSV Loader page includes any custom module and session attributes.

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

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

Additional Information

Import Courses with the Course CSV Loader

Course CSV Loader Field Reference

Import Courses with the Course CSV Loader

Course administrators can add, update and delete learning modules in bulk at module, session and class level via the Course CSV Loader. You must first populate in a comma delimited (CSV) file, at a minimum, the mandatory fields required for type of import (that is, adding a new course, updating an existing course, or deleting a course).

To add, update or delete courses in the LMS via the Course CSV Data Loader

1. Go to **Manage Center > Learning > Import > Course CSV Loader**. The Course CSV Loader page opens and lists your previous course CSV imports, if any.

   To see previous CSV imports from any user, select **Anyone** from the Uploaded By drop-down list.

2. If required, download the CSV file template and enter the course information in the relevant fields.

3. Click **+ Import CSV file**.

4. Click **Choose File** to select the CSV file to upload.

5. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.

6. Select the delimiter used to separate fields in your CSV file. This is a comma in the downloadable CSV file template. Alternatively, you can use semicolons in your own CSV files.

7. Select the check box if you want to send notification emails to instructors who have been assigned to or de-assigned from sessions, as configured in the imported CSV file. Notifications are sent subject to the email templates selected for this process in System Configuration.

8. Select an option to send or not send learners a notification email, on a per session or per module basis, when new sessions have become available and they have indicated interest in the course. Notifications are sent subject to the enrollment policy assigned to the learning module.

9. Click **Preview**. The contents of the CSV file are shown in the Data Loader page so that you can review the data before importing the file.

10. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.

Additional Information

About the Course CSV Loader

Course CSV Loader Field Reference

About Session Email Notifications

Course CSV Loader Field Reference

Use the reference tables below to help you correctly format the learning module, session and class data you want to import via the Course CSV Loader.

Course administrators can add, update and delete courses in the LMS via the Course CSV Loader.

To add, update or delete courses in the LMS via the Course CSV Loader, go to **Manage Center > Learning > Import > Course CSV Loader**.

Setting Custom Attribute Values

To assign values to custom module or session attributes, add the name of the attribute to the end of the heading row, prefixed with MA- or SA- respectively. For example, "SA-My Custom Session Attribute".

Depending on the attribute type, the loader requires attribute values to be formatted as follows.

Table: Attribute Types

Attribute Type	Required Format
Free text	Any character or string enclosed in double quotes. Maximum length is 2,000 characters.
Text area	Any character or string enclosed in double quotes. Can include HTML markup. Maximum length is 2,000 characters, including any markup.
Drop-down	The code of one of the module attribute values defined for the drop-down.
Numeric	A number, which can include a decimal point (for example, 48.72).
Check box	Y or N.
Date	Must be in the format *yyyy-MM-dd HH:mm:ss (for example*, 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.).

Table: Course CSV Loader field reference

Field	Content	Data Handling	Default
Action	Control Action (Either Add, Delete or Update)	Must be "A", "D", "U", or "AU" (Add, Delete, Update, Add or Update as appropriate)	None
ModuleID	Module ID	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 85 characters)	None

ModuleLearningType	Learning Type	Must be one of: • A - Audio Cassette • B - Book • D - CD ROM • R - Classroom • 4 - Coaching • M - Exam • X - External Certification • Q - Just-In-Time Learning • O - Online • J - On-the-Job Training • 1 - Self-Training (Paper) • 2 - Self-Training (Video) • 3 - Special Interest Group • T - Task • I - Video • V - Virtual Classroom • U - Virtual Classroom (Archived) • W - Workshop/ Seminar (maximum 1 character)	None
ModuleTitle	Course Title	Any Text (Max field length:255)	no title
ModuleDescription	Course Description	Any Text (Max field length: None)	None

ModuleMoreInfoHyperlink	More Information Hyperlink	Any Text (Max field length:500)	None
ModuleDurationComments	Duration Comments	Any Text (Max field length:100)	None
ModuleSubject	Subject	Name of a Predefined Course Subject Any Text (Max field length:50)	None
ModuleCategory	Category	Name of a Predefined Course Category Any Text (Max field length:50)	None
ModuleImage	Image for Catalog Display	A valid URL for an image, e.g., http://www.abc.com/ abc.png or /ekp/nd/ fresco/repository/ EKP0002343.jpg Any Text (Max field length:100)	None
ModuleShowInCatalog	Show in catalog	Y or N	N
ModuleArchive	Archive	Y or N	N
ModuleArchiveDate	Auto-Archive Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
ModulePeerComments	Allow peer review/ comments	Y or N	Y
ModuleChargeType	Module Charge Procedure	Must be one of: • NONE - No charge. • PER REG - Charged per Registration • ONLINE - Online Payment	NONE (that is, No charge).

ModuleCost	Course Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
ModuleCurrency	Module Charge Currency	A three-letter currency code, e.g., GBP or USD	None
ModulePriceInfo	Currency Cost Price Info	Any Text (Max field length:300)	None
ModuleCostCenter	Charged Cost Center	Any Text (Max field length:45)	None
ModuleTokenCost	Token Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
ModuleTokenPriceInfo	Token Cost Price Info	Any Text (Max field length:300)	None
ModuleLanguage	Language	Name of a Predefined Course Language or ISO 2-char codes, e.g., en, fr_CA, es_ES Any Text (Max field length:50)	English
ModuleVendor	Vendor	Name of a Predefined Course Vendor Any Text (Max field length:255)	None
ModuleCertification	Certification Name	Name of a Predefined Certification Any Text (Max field length:1,000)	None
ModuleExams	Exams	List of predefined exam IDs, delimited by vertical bars, e.g., EXAM1|EXAM2|EXAM3	None
ModuleExamsMandatory	Exams are mandatory.	Y or N	N

ModuleExamCompletesModule	Passing exam(s) automatically completes this module	N - No Y - Any of the selected exams. A - All of the selected exams.	N
ModuleEvaluation	Evaluation	Exam ID of Predefined Evaluation	None
SupervisorAssessment	Supervisor Assessment	Exam ID of Predefined Supervisor Assessment	None
ModuleCatalogs	Assign course to catalogs	A list of catalog names, each of which may be hierarchical, separated by a vertical bar, e.g., A/B/C1|A/B/C2	None
ModuleAudience	Audience	List of descriptions delimited by vertical bars ("|"). Each description has a maximum length of 255.	None
ModuleObjectives	Objectives	List of descriptions delimited by vertical bars ("|"). Each description has a maximum length of 2,000.	None
ModuleAllowUserWithdraw	Allow users to WITHDRAW	Y or N	Y
ModuleUserWithdrawReason	Prompt user for reason for the withdrawal	Y or N	N
ModuleAllowUserComplete	Allow users to mark Completed (Self-Asserted)	Y or N	Y
ModuleAllowStatusChange	Allow status changes to be made at any time (e.g., ignore standard business rules)	Y or N	N
ModuleAllowReEnroll	Allow re-enrollment	Y or N	Y

ModuleEnrollmentPolicy	Enrollment Policy	Name of a Predefined Enrollment Policy Any Text (Max field length:50)	None
ModuleOrgPolicyFirst	Org policy overrides course policy.	Y or N	N
ModuleKcEnable	Enable the Knowledge Center for this module	Y or N	Y
ModuleKcShowPictureArea	(KC) AREA: Show picture area	"Y", "N" or "I" ("I", Knowledge Center show picture area configuration inherits from catalog setting)	Y
ModuleKcPicture	KC Picture URL	A valid URL for an image, e.g., http://www.abc.com/abc.png or /ekp/nd/fresco/repository/EKP0002343.jpg Any Text (Max field length:255)	None
ModuleKcAllowCourseLaunch	Allow module launches in KC	Y or N	Y
ModuleKcCourseLink	Course link always launches the KC instead of the course.	Y or N	N
ModuleKcAssessmentWorkflow	(KC) AREA: Show assessment workflow area	Y or N	Y
ModuleKcCertification	(KC) AREA: Show certification area	Y or N	Y
ModuleKcContactList	(KC) AREA: Show contact list area	Y or N	Y
ModuleKcCourseSummary	(KC) AREA: Show course summary area	Y or N	Y
ModuleKcEvaluation	(KC) AREA: Show evaluation area	Y or N	Y

ModuleKcForum	(KC) AREA: Show forum area	Y or N	Y
ModuleKcInstructorList	(KC) AREA: Show instructor list area	Y or N	Y
ModuleKcNews	(KC) AREA: Show news area	Y or N	Y
ModuleKcNotepad	(KC) AREA: Show notepad area	Y or N	Y
ModuleKcPeerComments	(KC) AREA: Show peer comments area	Y or N	Y
ModuleKcReferences	(KC) AREA: Show references area	Y or N	Y
ModuleKcStatusChange	(KC) AREA: Show status change area	Y or N	Y
ModuleKcExam	(KC) AREA: Show exam area	Y or N	Y
ModuleKcInstructorAboutMe	(KC) AREA: Show About Me for the instructor	Y or N	Y
ModuleKcInstructorReferences	(KC) AREA: Show reference share area for instructors	Y or N	Y
ModuleKcFileShare	(KC) AREA: Show file share area	Y or N	N
ModuleKcHomeworkDropBox	(KC) AREA: Show homework drop box	Y or N	N
ModuleKcMarkedHomework	(KC) AREA: Show marked/reviewed homework	Y or N	N
ModuleKcTranscript	(KC) AREA: Show transcript area	Y or N	Y
ModuleKcQuickEvaluation	(KC) AREA: Show quick evaluation area	Y or N	N
ModuleKcShowModule Attributes	(KC) AREA: Show Module Attributes	Y or N	Y
CreateWikiSpace	Create Wiki Space	Y or N	N

WikiSpaceName	Wiki Space Name	Any Text (Max field length: None)	Course Title
ModuleEvalMandatory	Mandatory Evaluation	Y or N	N
TemplateID	Template	Name of a Predefined Template (Updates only)	None
PermReplace	Permissions Action	"Y" - to completely replace permission settings on this course using permissions from the "master template". "N" - to add to existing permission settings on this course using permissions from the "master template".	N
PermTemplateID	Permissions Template	Learning object ID whose permissions are used as a "master template" for this course.	None
ModuleRequireESignatures	Require eSignatures	Y or N	N
ModuleAllowReopen	To prevent a participant from reopening this module once it has been completed, use the setting below.	Y or N	Y
ModuleAllowPublicAccess	This module/program currently allows public access.	Y or N	Y
ModuleSupportContact	Course Support Contact	Any Text (Max field length:255)	None
Prereq_Lid	Prerequisites	List of module IDs delimited by vertical bars ("|"). The maximum length of the list is 255.	None

Prereq_Check_Type	Prerequisite Check Type	NO_PREVIOUS, ENROLLED, CMI_COMPLETE, or COMPLETE. Only effective when used with PREREQ_LID list.	ENROLLED
Prereq_Logic	Prerequisite Check Type	AND, OR. Only effective when used with PREREQ_LID list.	AND
Prereq_Lid_Sec	Prerequisites	List of module IDs delimited by vertical bars ("|"). The maximum length of the list is 255.	None
Prereq_Check_Type_Sec	Prerequisite Check Type	NO_PREVIOUS, ENROLLED, CMI_COMPLETE, or COMPLETE. Only effective when used with PREREQ_LID list.	ENROLLED
Prereq_Logic_Sec	Prerequisite Check Type	AND, OR. Only effective when used with PREREQ_LID list.	AND

ModuleAllowSelfEnrollment	Allow self-enrollment	Y or N
		
		Applicable only for the following types:
		
		  • R - Classroom
		
		  • M - Exam
		
		  • O - Online
		
		  • T - Task
		
		  • V - Virtual Classroom
		
		  • U - Virtual Classroom (Archived)
		
		  • W - Workshop/ Seminar
			Y

ModuleAllowSessionTransfer	Allow session transfer	Y or N	N
SessionID	Session Code	Any Text (Max field length:85)	None

SessionTitle	Session Title	Any Text (Max field length:255)	None
SessionDescription	Session Description	Any Text (Max field length: None)	None
SessionStatus	Session Status	Must be one of: • active - Active • pending - Pending • completed - Completed • closed - Closed • cancelled - Cancelled • invitation - Invitation Only • prompt - Prompt user to select session. • retired - Retired • ended - Ended	Observe System Configuration setting
SessionLanguage	Delivery Language	Name of a Predefined Course Language or ISO 2-char codes, e.g., en, fr_CA, es_ES or *AUTO* Any Text (Max field length:50)	Auto-Select
SessionDeadlineDays	Completion Deadline (Days)	Days from Enrollment (0 implies unlimited)	None
SessionDeadlineDate	Completion Deadline (Date)	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None

SessionDeadlineHandling	Completion Deadline Handling	N - Do nothing, the deadline was just for reference Y - Set transcript to DEADLINE EXPIRED and block learner from launching the course B - Block learner from launching other courses until they complete this course	N
SessionSeatLimitRule	Session Seat Limit Rule	Empty or one of: • FIXED - Based on min/max enrollment limits • DYNAMIC - Based on facility size/capacity	Depends on learning type
SessionMaxUsers	Session Enrollment Limit Maximum	Any Positive Whole Number	None
SessionMinUsers	Session Enrollment Limit Minimum	Any Positive Whole Number	None
SessionCountPendingInTotal	Count "Pending Approval" records in total current enrollments	Y or N	N
SessionWithdrawDaysLimit	Cannot withdraw within N days of start date	Any Positive Whole Number	None
SessionChargeType	Session Charge Procedure	Must be one of: • NONE - No charge. • PER REG - Charged per Registration • MODULE - Use Module Configured Settings • ONLINE - Online Payment	Use Module Configured Settings

SessionCost	Session Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
SessionCurrency	Session Charge Currency	A three-letter currency code, e.g., GBP or USD	None
SessionPriceInfo	Session Level Currency Cost Price Info	Any Text (Max field length:300)	None
SessionCostCenter	Charged Cost Center	Any Text (Max field length:45)	None
SessionTokenCost	Session Level Token Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
SessionTokenPriceInfo	Session Level Token Cost Price Info	Any Text (Max field length:300)	None
SessionWaitListHandling	Session Level Waitlist Handling	Must be one of: • AUTO - Automatic Upgrade • MANUAL - Manual (Administrator) Upgrade • ALL - Waitlist all learners. • NONE - No waitlist	AUTO
SessionEnrolmentStart	Session Level Enrollment Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
SessionEnrolmentEnd	Session Level Enrollment End Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
SessionTrainingHours	Credits	A decimal value with up to two decimal places, e.g., 12.50 or 5.25	0
SessionCustomText	Session Level Custom Text	Any Text (Max field length:255)	None

SessionTimeZone	Session Level Time Zone	Time zone ID	System Time Zone
SessionInstructors	Session Instructor List	List of user IDs belonging to instructors to be assigned to the session, separated by vertical bar, e.g. instr1^assignmentId1 | instr2^assignmentId2| instr3^assignmentId3	None
SessionApprovers	Session Approver List	Up to two user IDs belonging to approvers to be assigned to the session, separated by vertical bar (e.g., appr1^assignmentId1| appr2^assignmentId2)	None
SessionGeographicRegion	Session Geographic Region	Name of a Predefined Geographic Region	None
SessionAssessmentWorkflow Template	Session Assessment Workflow Template Name	Name of a Predefined Assessment Workflow Template	None
SessionDisableWorkflow Assignment	Disable workflow assignment for the session	Y or N	N
ShowSessionSelection Reminder	Session level "Show session selection reminder"	Y or N	Y
SessionAllowPromptSession SelfEnrollment	Session Level "Make Prompt user to select session available for self-enrollment"	Y or N	N
SessionDroppedWaitlistTarget Session	Session Level target session for "Transfer users dropped from waitlist to the following session"	Session Code (*NONE* to clear)	None
ClassStart	Class Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None

NewClassStart	New Class Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
ClassEnd	Class End Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
ClassFacilityCode	Class Level Facility Code	Code of Predefined Facility Any Text (Max field length:85)	None
ClassVenue	Class Level Venue	Any Text (Max field length:255)	None
ClassRoomName	Class Level Room Name	Any Text (Max field length:255)	None
ClassInstructors	Class Instructor List	List of user IDs belonging to instructors to be assigned to the class, separated by vertical bars, e.g., instr1^assignmentId1|instr2^assignmentId2|instr3^assignmentId3	None
Launch.Href	Launch HREF	URL for content launch	None
Launch.Interface	Launch Interface	Type of launch handler: • 0 – Generic Web Launch • 3 – Structured Content • 5 – Resource • 7 – Timed HTML • 14 – Rustici Engine	None

Launch.RuntimeEnvironment	Runtime Environment	Type of runtime environment for Launch Interface 5 – Resource: • g – Generic/none • s – JavaScript API • a – AICC/HACP • x – xAPI (also known as 'Tin Can API') • t – Exam	None
Launch.ExamId	Launch Exam Id	Launchable exam identifier	None
Online.Win_Height	Online Window Height	Height (pixels) of window	None
Online.Win_Width	Online Window Width	Width (pixels) of window	None
Online.Grading_Method	Online Grading Method	Grading Method (online only) • H - Highest • A - Average • F - First • L - Last	None
Online.Completion_Method	Online Completion Method	Completion Method (online only) • A - Auto • M - Manual	None
Online.Mastery_Score	Online Mastery Score	Mastery Score (online only)	None

About the Program CSV Loader

Course administrators can add, update and delete learning programs individually or in bulk via the Program CSV Loader. The Program CSV Loader imports a comma—or semicolon—separated values (CSV) file containing a heading row and any number of data rows. Additional headers and data can be included for custom module and session attributes.

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

```
Action,ProgramID,ProgramTitle,ProgramDescription


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

You do not need to add values for every heading to import a Program CSV file, but certain fields must have values, depending on the action. You can continue to configure programs created or updated from a CSV import in the Catalog Editor.

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

Table: Effects of A, U and D actions

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

D (delete)	• If the ProgramID is entered, the program module is removed from the LMS.
	• If ProgramID and SessionID are entered and not the assigned module CourseID and SessionID, the session is removed from the program.
	• If ProgramID and SessionID is entered with the assigned module, the assigned module is removed from the session (not the session from the program).

Preparing CSV Files for Import

To prepare a Program CSV file for import, you can download a template CSV file from the Program CSV Loader page and populate the fields as required, or you can run report R246 or R247 to export one or more courses to a CSV file and update the field values. The CSV file template you download from the Program CSV Loader page includes any custom module and session attributes.

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

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

Additional Information

Import Programs with the Program CSV Loader

Program CSV Loader Field Reference

Import Programs with the Program CSV Loader

Course administrators can add, update and delete programs in bulk at module, session and class level via the Program CSV Loader. You must first populate in a comma delimited (CSV) file, at a minimum, the mandatory fields required for type of import (that is, adding a new course, updating an existing course, or deleting a course).

To add, update or delete courses in the LMS via the Program CSV Data Loader

1. Go to **Manage Center > Learning > Import > Program CSV Loader**. The Program CSV Loader page opens and lists your previous program CSV imports, if any.

   To see previous CSV imports from any user, select **Anyone** from the Uploaded By drop-down list.

2. If required, download the CSV file template and enter the program information in the relevant fields. (Click the **CSV Formatting Help** link for guidance on each field.)

3. Click **+ Import CSV file**.

4. Click **Choose File** to select the CSV file to upload.

5. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.

6. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.

7. Select the check box if you want to send notification emails to instructors who have been assigned to or de-assigned from sessions, as configured in the imported CSV file. Notifications are sent subject to the email templates selected for this process in System Configuration.

8. Select an option to send or not send learners a notification email, on a per session or per module basis, when new sessions have become available and they have indicated interest in the course. Notifications are sent subject to the enrollment policy assigned to the learning module.

9. Click **Preview**. The contents of the CSV file are shown in the Data Loader page so that you can review the data before importing the file.

10. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.

Additional Information

[About the Program CSV Loader](#)

[Program CSV Loader Field Reference](#)

[About Session Email Notifications](#)

Program CSV Loader Field Reference

Use the reference tables below to help you correctly format the program data you want to import via the Program CSV Loader.

Course administrators can add, update and delete courses in the LMS via the Program CSV Loader.

To add, update or delete courses in the LMS via the Program CSV Loader, go to **Manage Center > Learning > Import > Course CSV Loader**.

Setting Custom Attribute Values

To assign values to custom module or session attributes, add the name of the attribute to the end of the heading row, prefixed with MA- or SA- respectively. For example, "SA-My Custom Session Attribute".

Depending on the attribute type, the loader requires attribute values to be formatted as follows.

Table: Attribute Types

Attribute Type	Required Format
Free text	Any character or string enclosed in double quotes. Maximum length is 2,000 characters.
Text area	Any character or string enclosed in double quotes. Can include HTML markup. Maximum length is 2,000 characters, including any markup.
Drop-down	The code of one of the module attribute values defined for the drop-down.
Numeric	A number, which can include a decimal point (for example, 48.72).
Check box	Y or N.
Date	Must be in the format *yyyy-MM-dd HH:mm:ss (for example*, 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.).

Table: Program CSV Loader field reference

Field	Content (in Catalog Editor)	Data Handling	Default
Action		Must be "A", "D", or "U" (Add, Delete, or Update)	None

ProgramID	Module ID	A Unique ID That Conforms to PeopleFluent LMS ID constraints (maximum 85 characters)	None
ProgramTitle	Course Title	Any text (Max field length:255)	no title
ProgramDescription	Course Description	Any text (Max field length: None)	None
ProgramMoreInfoHyperlink	More Information Hyperlink	Any text (Max field length:500)	None
ProgramDurationComments	Duration Comments	Any text (Max field length:100)	None
ProgramSubject	Subject	Name of a Predefined Course Subject Any text (Max field length:50)	None
ProgramCategory	Category	Name of a Predefined Course Category Any text (Max field length:50)	None
ProgramImage	Image for Catalog Display	A valid URL for an image, e.g., http://www.abc.com/abc.png or /ekp/nd/fresco/repository/EKP0002343.jpg Any text (Max field length:100)	None
ProgramShowInCatalog	Show in catalog	Y or N	N
ProgramArchive	Archive	Y or N	N
ProgramArchiveDate	Auto-Archive Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
ProgramPeerComments	Allow peer review/comments	Y or N	Y

ProgramChargeType	Module Charge Procedure	Must be one of: • NONE - No charge. • PER REG - Charged per Registration • ONLINE - Online Payment	NONE (that is, No charge).
ProgramCost	Course Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
ProgramCurrency	Module Charge Currency	A three-letter currency code, e.g., GBP or USD	None
ProgramPriceInfo	Currency Cost Price Info	Any text (Max field length:300)	None
ProgramCostCenter	Charged Cost Center	Any text (Max field length:45)	None
ProgramTokenCost	Token Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
ProgramTokenPriceInfo	Token Cost Price Info	Any text (Max field length:300)	None
ProgramLanguage	Language	Name of a Predefined Course Language or ISO 2-char codes, e.g., en, fr_CA, es_ES Any text (Max field length:50)	English
ProgramVendor	Vendor	Name of a Predefined Course Vendor Any text (Max field length:255)	None
ProgramCertification	Certification Name	Name of a Predefined Certification Any text (Max field length:1,000)	None

ProgramExams	Exams	List of predefined exam IDs, delimited by vertical bars, e.g., EXAM1|EXAM2|EXAM3	None
ProgramExamsMandatory	Exams are mandatory.	Y or N	N
ProgramExamCompletesModule	Passing exam(s) automatically completes this module	N - No Y - Any of the selected exams. A - All of the selected exams.	N
ProgramEvaluation	Evaluation	Exam ID of Predefined Evaluation	None
ProgramEvalMandatory	Mandatory Evaluation	Y or N	N
ProgramCatalogs	Assign course to catalogs	A list of catalog names, each of which may be hierarchical, separated by a vertical bar, e.g., A/B/C1|A/B/C2	None
ProgramAudience	Audience	List of descriptions delimited by vertical bars (|). Each description has a maximum length of 255.	None
ProgramObjectives	Objectives	List of descriptions delimited by vertical bars (|). Each description has a maximum length of 2,000.	None
ProgramAllowUserWithdraw	Allow users to WITHDRAW	Y or N	Y
ProgramUserWithdrawReason	Prompt user for reason for the withdrawal	Y or N	N
ProgramAllowUserComplete	Allow users to mark Completed (Self-Asserted)	Y or N	Y
ProgramAllowStatusChange	Allow status changes to be made at any time (e.g., ignore standard business rules)	Y or N	N

ProgramAllowReEnroll	Allow re-enrollment	Y or N	Y
ProgramEnrollmentPolicy	Enrollment Policy	Name of a Predefined Enrollment Policy Any text (Max field length:50)	None
ProgramShareCreditsValidityPeriod	Validity of Learning	Whole positive number or zero	0
ProgramKcEnable	Enable the Knowledge Center for this module	Y or N	Y
ProgramKcShowPictureArea	(KC) AREA: Show picture area	"Y", "N" or "I" ("I", Knowledge Center show picture area configuration inherits from catalog setting)	Y
ProgramKcPicture	KC Picture URL	A valid URL for an image, e.g., http://www.abc.com/abc.png or /ekp/nd/fresco/repository/EKP0002343.jpg Any text (Max field length:255)	None
ProgramKcAllowCourseLaunch	Allow module launches in KC	Y or N	Y
ProgramKcCourseLink	Course link always launches the KC instead of the course.	Y or N	N
ProgramKcAssessmentWorkflow	(KC) AREA: Show assessment workflow area	Y or N	Y
ProgramKcCertification	(KC) AREA: Show certification area	Y or N	Y
ProgramKcContactList	(KC) AREA: Show contact list area	Y or N	Y
ProgramKcCourseSummary	(KC) AREA: Show course summary area	Y or N	Y
ProgramKcEvaluation	(KC) AREA: Show evaluation area	Y or N	Y

ProgramKcForum	(KC) AREA: Show forum area	Y or N	Y
ProgramKcInstructorList	(KC) AREA: Show instructor list area	Y or N	Y
ProgramKcNews	(KC) AREA: Show news area	Y or N	Y
ProgramKcNotepad	(KC) AREA: Show notepad area	Y or N	Y
ProgramKcPeerComments	(KC) AREA: Show peer comments area	Y or N	Y
ProgramKcReferences	(KC) AREA: Show references area	Y or N	Y
ProgramKcStatusChange	(KC) AREA: Show status change area	Y or N	Y
ProgramKcExam	(KC) AREA: Show exam area	Y or N	Y
ProgramKcInstructorAboutMe	(KC) AREA: Show About Me for the instructor	Y or N	Y
ProgramKcInstructorReferences	(KC) AREA: Show reference share area for instructors	Y or N	Y
ProgramKcFileShare	(KC) AREA: Show file share area	Y or N	N
ProgramKcHomeworkDropBox	(KC) AREA: Show homework drop box	Y or N	N
ProgramKcMarkedHomework	(KC) AREA: Show marked/reviewed homework	Y or N	N
ProgramKcTranscript	(KC) AREA: Show transcript area	Y or N	Y
ProgramKcQuickEvaluation	(KC) AREA: Show quick evaluation area	Y or N	N
ModuleKcShowModule Attributes	(KC) AREA: Show Module Attributes	Y or N	Y
ProgramWikiSpace	Create Wiki Space	Y or N	N

ProgramSpaceName	Wiki Space Name	Any text (Max field length: None)	Course Title
PermReplace	Permissions Action	"Y" - to completely replace permission settings on this course using permissions from the "master template". "N" - to add to existing permission settings on this course using permissions from the "master template".	N
PermTemplateID	Permissions Template	Learning object ID whose permissions are used as a "master template" for this course.	None
ProgramRequireESignatures	Require eSignatures	Y or N	N
ProgramSupportContact	Program Support Contact	Any text (Max field length:255)	None
SessionID	Session Code	Any text (Max field length:85)	None
SessionTitle	Session Title	Any text (Max field length:255)	None
SessionDescription	Session Description	Any text (Max field length: None)	None

SessionStatus	Session Status	Must be one of: • active - Active • pending - Pending • completed - Completed • closed - Closed • cancelled - Cancelled • invitation - Invitation Only • prompt - Prompt user to select session. • retired - Retired • ended - Ended	Observe System Configuration setting
SessionLanguage	Delivery Language	Name of a Predefined Course Language or ISO 2-char codes, e.g., en, fr_CA, es_ES or *AUTO* Any text (Max field length:50)	Auto-Select
SessionDeadlineDays	Completion Deadline (Days)	Days from Enrollment (0 implies unlimited)	None
SessionDeadlineDate	Completion Deadline (Date)	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None

SessionDeadlineHandling	Completion Deadline Handling	N - Do nothing, the deadline was just for reference Y - Set transcript to DEADLINE EXPIRED and block learner from launching the course B - Block learner from launching other courses until they complete this course	N
SessionChargeType	Session Charge Procedure	Must be one of: • NONE - No charge. • PER REG - Charged per Registration • MODULE - Use Module Configured Settings • ONLINE - Online Payment	Use Module Configured Settings
SessionCost	Session Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
SessionCurrency	Session Charge Currency	A three-letter currency code, e.g., GBP or USD	None
SessionPriceInfo	Session Level Currency Cost Price Info	Any text (Max field length:300)	None
SessionTokenCost	Session Level Token Cost	A monetary value with up to two decimal places, e.g., 250 or 350.55	None
SessionTokenPriceInfo	Session Level Token Cost Price Info	Any text (Max field length:300)	None

SessionCostCalculation	Program Cost Calculation	Must be one of: • SessionCost - Use amount specified above • TotalCost - Use total cost of modules in program session (individual debit transactions and a zero debit transaction for the program)	Use amount specified above
SessionTimeZone	Session Level Time Zone	Time zone ID	System Time Zone
SessionInstructors	Session Instructor List	List of user IDs belonging to instructors to be assigned to the session, separated by vertical bar, e.g. instr1^assignmentId1 | instr2^assignmentId2| instr3^assignmentId3	None
SessionStart	Session Level Enrollment Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
SessionEnd	Session Level Enrollment End Date	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
SessionApprovers	Session Approver List	Up to two user IDs belonging to approvers to be assigned to the session, separated by vertical bar (e.g., appr1^assignmentId1| appr2^assignmentId2)	None

SessionPayment	For program modules with payment configured: Enforce payment before first launch.	Y or N	N
SessionOrdered	Modules cannot be accessed until all preceding modules are completed.	"N", "Y", "YF", "YH", or "YFH" "N" and "Y" are for disabling and enabling the option respectively. Appending an "F" will enable the "Allow learner to advance to next order on failing preceding learning" sub-option. Excluding it implies it should be disabled. Appending an "H" will enable the "Hide modules blocked by preceding modules in Learner's Available Modules" sub-option. Excluding it implies it should be disabled.	N
SessionRevision	Program completion requires modules to be on Effective/Approved revision	"Y" if program completion requires modules to be on Effective/Approved revision, otherwise "N".	N
SessionCredits	Use predefined credits	Y or N	Y
SessionNumberCredits	Required Credits for Elective Modules	Whole positive number or zero	0
SessionPassingScore	Passing Score	Positive number	0
SessionAssessmentWorkflow Template	Session Assessment Workflow Template Name	Name of a Predefined Assessment Workflow Template	None
SessionDisableWorkflow Assignment	Disable workflow assignment for the session	Y or N	N
SessionAssignedModuleID	Assigned module	Course ID of Selected Course	None

SessionAssignedModuleSessionID	Session	Session code for nonprogram type modules; session ID for program type modules	None
SessionAssignedModuleWeight	Weighting	Positive number	0.0
SessionAssignedModuleOrder	Order	Integer between 0 and 127	0
SessionAssignedModuleCredits	Credits	Positive number	0
SessionAssignedModuleRequired	Required	Y or N	Y
SessionAssignedModuleEnrollment	Auto-enroll when available	Y or N	Y

SessionAssignedModuleAvailability	Available for self-enrollment	One of: • "P(1D)" where "1" can be replaced by any non-negative integer to denote the number of days after Parent Program Enrollment for availability • "O(2D)" where "2" can be replaced by any non-negative integer to denote the number of days after advancing to the module order for availability • "D(2016-01-31 17:00:00)" where "2016-01-31 17:00:00" can be replaced by any date in the same yyyy-MM-dd HH:mm:ss format from which the module will be available	P(0D)

SessionAssignedModuleDeadline	Progress Tracking Deadline	One of: • "I" Inherit from program deadline • "P(1D)" where "1" can be replaced by any natural integer to denote the number of days after Parent Program Enrollment as a deadline • "M(2D)" where "2" can be replaced by any natural integer to denote the number of days after Assigned Module Enrollment as a deadline • "D(2016-01-31 17:00:00)" where "2016-01-31 17:00:00" can be replaced by any date in the same yyyy-MM-dd HH:mm:ss format as a fixed date deadline	I

About the External Training Records CSV Loader

You can import external training records for learners in bulk via the External Training Records CSV Loader. This enables you to create and update learners' external training records outside of the LMS.

To get started, you can download a CSV file template and populate the required fields offline in a spreadsheet application or text editor. The LMS provides information to help you fill in the CSV template, such as the expected values for each field. For more information, see External Training Records CSV Loader Field Reference.

When creating external training records, the mandatory fields are:

- Action

- UserId

- Title

When updating a learner's record, the Action and RecordID are required, plus any other fields to be updated.

To delete a learner's record, only the Action and RecordID fields are required.

Administrators with unrestricted access to the *External Training CSV Loader* feature in System Roles (Manage Features > Catalog Manager Features) can create, update and delete external training records via the External Training Records CSV Loader.

To import external training records, go to **Manage Center > Learning > External Training Records CSV Loader**.

Preparing CSV Files for Import

To prepare a user CSV file for import, you can download a template CSV file from the External Training Records CSV Loader page and populate the fields as required.

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

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

Additional Information

Import External Training Records

External Training Records CSV Loader Field Reference

Import External Training Records

You can import external training records for learners in bulk via the External Training Records CSV Loader. You must first populate in a comma—or semicolon—separated values (CSV) file a row for each competency. For more information, see External Training Records CSV Loader Field Reference.

Administrators with unrestricted access to the *External Training CSV Loader* feature in System Roles (Manage Features > Catalog Manager Features) can create, update and delete external training records via the External Training Records CSV Loader.

To import external training records

1. Go to **Manage Center > Learning > External Training Records CSV Loader**. The External Training Records CSV Loader page opens and lists your previous imports, if any.

2. To see previous imports from any user, select **Anyone** from the Uploaded By drop-down list.

3. If required, download the CSV file template and enter the certification award information in the relevant fields. (Click the **CSV Formatting Help** link for guidance on each field.)

4. Click **+ Import CSV file**.

5. Click **Choose File** to select the CSV file to upload.

6. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.

7. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.

8. Click **Preview**. The contents of the CSV file are shown in the Data Loader page so that you can review the data before importing the file.

9. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.

10. If any records failed to import, you can go back to the External Training Records CSV Loader page and click the **CSV Error Report** link for the failed import. The error report downloads to your desktop as a copy of the imported file that includes the error message.

Additional Information

External Training Records CSV Loader Field Reference

About the External Training Records CSV Loader

External Training Records CSV Loader Field Reference

Use the reference table below to help you correctly format the competencies data you want to import via the External Training Records CSV Loader.

Administrators with unrestricted access to the *External Training CSV Loader* feature in System Roles (Manage Features > Catalog Manager Features) can create, update and delete external training records via the External Training Records CSV Loader.

To import external training records, go to **Manage Center > Learning > External Training Records CSV Loader**.

Table: External Training Records CSV Loader Field Reference

Field	Content	Description
Action	Control action (either add, delete or update)	Must be *A*, *D*, *U*, or *AU* (Add, Delete, Update, Add or Update as appropriate).
RecordID	Record ID	A unique ID that conforms to PeopleFluent LMS ID constraints (maximum 15 characters).
UserId	User ID	A unique ID that conforms to PeopleFluent LMS ID constraints (maximum 85 characters).
Title	Title	Any text (maximum length: 255).
CourseType	Learning Type	Must be one of: • TNS - (not specified) • C - Program • R - Classroom • O - Online • W - Workshop/Seminar
StartDate	Start Date	Must be in the format yyyy-MM-dd HH:mm:ss, for example, 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.
EndDate	End Date	Must be in the format yyyy-MM-dd HH:mm:ss, for example, 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.

Status	Status	Must be one of: • 0 - Open for editing • 1 - Pending Approval • 2 - Approved • 3 - Approval Denied • 4 - Completed • 5 - Cancelled
Subject	Subject	Name of a predefined course subject (maximum length: 50).
Grade	Grade	Any text.
Score	Score	Any text.
TrainingHours	Duration(Training hours)	A decimal value with up to two decimal places, for example, 12.50 or 5.25.
Cost	Course Cost	A monetary value with up to two decimal places, for example, 250 or 350.55.
Currency	Module Charge Currency	A three letter currency code, for example, GBP or USD.
Language	Language	The ISO code for the assigned language. For example, en, fr, fr_CA, es_ES. If no language is specified, it defaults to multi-language.
VendorInfo1	Vendor Information	Any text.
Comments	Comments	Any text.
AssignmentID	Job Profile Assignment ID	If multiple assignments is enabled, this is the learner's job profile assignment ID.

Additional Information

About the External Training Records CSV Loader

Import External Training Records

About the Training Records CSV Loader

Administrators can import training records (transcripts) for learners in bulk via the Training Records CSV Loader. This enables you to create and update learners' training records outside of the LMS. When you import training records, they can create new learning programs, modules and sessions, as well as specifying the learners' overall transcript statuses and assessment scores.

To import training records, go to **Manage Center > Learning > Training Records CSV Loader**.

Creating New Learning Objects

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. When a new learning module is created, a new session will also be created for it, with the specified start and end dates.

The system configuration setting *Automatically create learning objects when using dataloader* determines the default status of that check box. If it is selected in System Configuration, it will be selected by default in the Training Records CSV Loader.

Skipping Enrollment Checks

The standard enrollment process involves checking prerequisites, seat numbers, approvals, and so on, which can be very resource-intensive. When uploading historical records that do not require enrollment checks, you can select the *Skip enrollment checks* check box when importing the CSV file. This will bypass all enrollment checks and insert records into the database directly. This can improve data loading performance to approximately 8,000 records per minute.

The following caveats apply when you skip enrollment checks:

- You can only create new training records. Existing training records cannot be updated.

- The Transcript-Overall Status cannot be set to *Deactivated*.

- The Transcript-Overall Status cannot be set to *Completed* for Programs.

- The CSV import cannot create multiple enrollments for the same user and learning module.

- Awarding competencies and certificates according to definitions at the time of completion is not supported.

- New learning objects will always be created for Learning IDs that do not exist.

- The LOTYPE (Learning Type) field is required to indicate the learning type for the record (including top-level programs).

- Sessions can be updated where they allow instructors to be added to old modules.

Additional Information

Import Training Records

Training Records CSV Loader Field Reference

Import Training Records

Administrators can import training records (transcripts) for learners in bulk via the Training Records CSV Loader. This enables you to create and update learners' training records outside of the LMS. When you import training records, they can create new learning programs, modules and sessions, as well as specifying the learners' enrollment statuses and assessment scores.

To import training records

1. Go to **Manage Center > Learning > Training Records CSV Loader**. The Training Records CSV Loader opens and lists your previous imports, if any.

   To see previous imports from any user, select **Anyone** from the Uploaded By drop-down list.

2. If required, download the CSV file template and enter the training records information in the relevant fields. (Click the **CSV Formatting Help** link for guidance on each field.)

3. Click **+ Import CSV file**.

4. Click **Choose File** to select the CSV file to upload.

5. If your CSV file was saved with a specific file encoding the LMS can automatically detect it, otherwise you can select it from the list.

6. Select the delimiter used to separate fields in your CSV file. This can be a comma or a semicolon.

7. If you do not want to skip enrollment checks, you can select the **Suppress automatic e-mails** check box to stop notification emails being sent to users.

8. Select the **Skip enrollment check** check box to skip enrollment checks on prerequisites, seat numbers, approvals, and so on, which may not be necessary for historical records.

9. Select the **Create learning objects for new Learning IDs found in the file** check box to create new learning objects. The system configuration setting, *Automatically create learning objects when using dataloader*, must also be enabled.

10. Click **Preview**. The contents of the CSV file are shown in the Data Loader page so that you can review the data before importing the file.

11. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.

12. If any records failed to import, you can go back to the Training Records CSV Loader page and click the **CSV Error Report** link for the failed import. The error report downloads to your desktop as a copy of the imported file that includes the error message.

Additional Information

About the Training Records CSV Loader

Training Records CSV Loader Field Reference

Training Records CSV Loader Field Reference

Use the reference tables below to help you correctly format the training records you want to import via the Training Records CSV Loader.

Course administrators can create and update learners' training records for programs, learning modules and sessions, specifying the learners' overall transcript statuses and assessment scores.

To import training records, go to **Manage Center > Learning > Training Records CSV Loader**.

Table: Training Records CSV Loader field reference

Field	Content	Data Handling	Default
USERID	User ID	If blank, a classroom and session will be created with no associated training record.	None
LEARNINGID	Learning ID	Enter the learning object ID to create training records for. A classroom and session will be created even if there is no USERID tagged to this code.	None
LOTITLE	Learning Module Title	A classroom and session will be created even there is no USERID tagged to this module title.	None

ENROLLDATE	Enrollment Date	The following date formats are supported: • dd-mm-yy HH:MM (e.g. "31-12-19 18:30") • dd-mm-yyyy HH:MM (e.g. "31-12-2019 18:30") • dd-mmm-yy HH:MM (e.g. "31-dec-19 18:30") • dd-mmm-yyyy HH:MM (e.g. "31-dec-2019 18:30") 00:00 will be the assumed time if HH:MM values are not specified Enter NONE for no specified date. For dd-mm-yy and dd-mmm-yy formats where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.	If not specified, the start date isused. If the start date is not specified or is in the future, today's date is used.
STARTDATE	Transcript Detail Start Date	See Enrollment Date, above.	None
ENDDATE	Transcript Detail End Date	See Enrollment Date, above.	None

STUDENTSTATUS	Transcript Overall Status	Enter one of the following transcript overall status values: • Pass • Completed • Active • Withdrawn • Deactivated • Exempt If the value is *Active*, the learner will be enrolled to the learning module. If the record has valid dates for STARTDATE and ENDDATE (including past of future dates), the transcript overall status will be set to *In Progress*; otherwise it will be set to *Not Started*. For new program enrollments, the transcript overall status will be set to *Completed* if the learner has already satisfied all program completion requirements.	None
CREATESESSION	True or false	Enter `true` to create a new session. Enter `false` to update existing sessions based on the SESSIONCODE, STARTDATE, and ENDDATE. This applies only to Classroom, Virtual Classroom and Workshop/Seminar learning types. If no session exists, a new session will be created regardless of the value entered here.	False
Training Venue	Facility Code of the session or event	When a new session is created, the facility code you enter here is used for the training record. If code provided does not exist, it will not be set.	None

Instructor	Instructor User IDs	When a new session is created, the User IDs you enter here is used for the training record. To specify more than one instructor, separate their User IDs with a vertical bar (for example, `instr1|instr2|instr3`), If the user IDs provided are not valid, this value will not be set.	None
SESSIONSTATUS	Learning module event status	Enter one of the following values for when a new session is created: • Active • Completed • Cancelled	Completed
SESSIONCODE	Session Code of the session or event	When updating a session, enter the session code to identify a specific session in a multi-session course. When creating a session, the session will take the specified value. If you do not specify a session code, it will be generated in the format as configured in System Configuration.	None
SESSIONTITLE	Session Title of the session or event	Enter a session title to be used when a new session is created or when the session start date and end date are updated.	None
SCORE	Assessment Score	You can enter an assessment score for classroom courses.	None

LOTYPE	Learning Type	Enter one of the following learning type values when *Skip enrollment check* is enabled: • C - Program • M - Exam • O - Online • R - Classroom • W - Workshop/Seminar • 1 - Self Training (Paper) • 2 - Self Training (Video) • 3 - Special Interest Group • 4 - Coaching	None
ACTION	Action	This field is ignored when *Skip enrollment check* is enabled. Enter A to add a learning record for the learner if none exists for the specified module session and start date. Enter U to update the learner's record for the specified module session. If left blank, the data loader will add a learning record for the learner if none exists for the specified module session, or update the learner's record if one already exists.	None
AssignmentID	Assignment ID	Enter the Assignment ID of the user's assignment in which the training record should be updated/created.	None
PRESCORE	Pre-assessment score	Enter a pre-assessment score. This is a numeric field.	None
POSTSCORE	Post-assessment score	Enter a post-assessment score. This is a numeric field.	None

LANGUAGE	Language	Enter the name of the predefined course language or the assigned language with an ISO 2-char code. For example, *en*, *fr_CA*, *es_ES*. This applies when inserting a new transcript record or creating a new session in a specific language. Max field length: 50.	Primary language
SESSIONTIMEZONE	Session level time zone	Enter the time zone.	System Time Zone for new session. Session's original timezone for existing session.
DEADLINEDAYS	Completion deadline (days)	Enter the completion deadline as the number of days from Enrollment (0 implies no deadline).	None
DEADLINEDATE	Completion deadline (date)	Must be in the format yyyy-MM-dd HH:mm:ss, e.g., 2020-08-25 13:00:00 denotes August 25, 2020, 1:00 p.m.	None
Parent Program ID	The Learning ID of the program context in which enrollment is intended	Applicable for new enrollments only and ignored when updating a transcript. The learner must already be enrolled on the specified program and the session must involve the specified child module. This field is ignored if *Skip enrollment check* is enabled.	None
Transfer Session Code	Code of session to transfer learner to	The code of a session within the same module to transfer the Learner to. Only applicable when updating an existing enrollment. This field is ignored if *Skip enrollment check* is enabled.	None
Performance Grade	Performance Grade ID	Enter one of the following values: • 1 - Excellent • 2 - Very Good • 3 - Good • 4 - Average • 5 - Poor • *NONE* - to clear	None

Additional Information

About the Training Records CSV Loader

Import Training Records

Migrate a Course to Rustici Engine

Course administrators can migrate courses that use the native LMS SCORM engine to Rustici Engine. Only SCORM, AICC and xAPI courses imported via the Import Content Package page can be migrated. It is not possible to migrate courses from Rustici Engine back to the native LMS SCORM engine.

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

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

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

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

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to migrate to Rustici Engine. The Catalog Editor opens at the Define Module Properties page.

2. Click **Define Launch Properties** in the Module Properties tab. The Web Launch Interface Specifications page opens.

3. Select **Rustici Engine** from the Launch interface drop-down list in the Web Launch Interface Specifications page.

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

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

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

Additional Information

Import a Module Revision in the Catalog Editor

About Rustici Engine

Define Launch Properties

About Enrollment Policies

Enrollment policies determine the workflow that the learner must follow when enrolling in a course or program, if and how they can withdraw, what information, if any, they must provide when enrolling, and the email templates used for notifications relating to their enrollment.

For courses that require a manager to approve a learner's enrollment, administrators with unrestricted access to the Enrollment Policy Editor can set up an approval-based enrollment policy. When the learner selects Enroll, an email can be sent to their manager (the approver) to either approve the enrollment or deny it. Approval can have multiple steps. For example, first a manager has to approve the enrollment, then the course instructor has to approve it. These steps can happen simultaneously or in sequence, being dependent on the success of the previous step.

If an enrollment policy allows learners to withdraw from an enrolled program or course, your organization may wish to configure an approval process for withdrawals and enforce it via the enrollment policy, particularly in situations where enrollment has been paid for.

Additional Information

Create an Enrollment Policy

About Course Withdrawal

About the Default Enrollment Policy

Create an Enrollment Policy

Administrators with unrestricted access to the Enrollment Policy Editor can create a new enrollment policy to specify how learners enroll—or are enrolled—in courses. You create enrollment policies in the Enrollment Policy Editor, where you must enter the policy's summary information, save it, and then add further details as required.

To open the Enrollment Policy Editor go to **Manage Center > Learning > Enrollment Policy Editor**. The Enrollment Policy Editor opens in a new window.

To create an enrollment policy

1. Create the policy summary and details.

    a. In the Enrollment Policy Editor click the **Create Policy** icon on the toolbar. The New Enrollment Policy page opens

    b. Enter the policy's summary information and details.

    c. Click the **Save** icon to save your changes.The Enrollment Policy is added to the Policies tab.

2. Optionally, edit the withdrawal details.

    a. In the Policies tab in the Enrollment Policy Editor, click the name of the enrollment policy you want to edit withdrawal details for. The policy folder expands to show the pages where you edit the policy.

    b. Click **Edit withdrawal details**. The Withdrawal Details page opens.

    c. Enter the withdrawal details.

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

3. Optionally, edit the additional enrollment information requested when learners enroll.

    a. In the Policies tab in the Enrollment Policy Editor, click the name of the enrollment policy you want to edit additional enrollment information for. The policy folder expands to show the pages where you edit the policy.

    b. Click **Edit additional enrollment information**. The Edit additional enrollment information page opens.

    c. Select the check boxes of the information you want learners to supply as part of their enrollment in a course. For each selected field, you can click the **Mark as Required** link to toggle between required and optional.

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

4. Optionally, add an approval step.

    a. In the Policies tab in the Enrollment Policy Editor, click the name of the enrollment policy you want to add an approval step for. The policy folder expands to show the pages where you edit the policy.

    b. Click **(Add a step)**. The New Approval Step page opens.

    c. Enter the approval step details.

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

5. Optionally, edit the order of approval steps.

   a. In the Policies tab in the Enrollment Policy Editor, click the name of the enrollment policy you want to edit the order of approval steps for. The policy folder expands to show the pages where you edit the policy.

   b. Click **Edit steps ordering**. The Policy Steps Ordering page opens.

   c. Click the up and down icons to move the steps up or down respectively. The steps are re-ordered instantly, you do not need to click **Save**.

Additional Information

About Enrollment Policies

Enrollment Policy Details

Withdrawal Details

Organization-level Enrollment Policies

Edit an Enrollment Policy

Enrollment Policy Details

Administrators with unrestricted access to the Enrollment Policy Editor can enter its summary information and details, described in the following table.

Table: Enrollment Policy Summary Information and Details

Field	Description
Policy Name	Enter a unique name for the enrollment policy. This field is mandatory.
Enrollment types that need to send the Enrollment Confirmation	Select the types of enrollment for which an enrollment confirmation email is sent to the learner.
Enrollment Confirmation	If you selected any enrollment types to send enrollment confirmation emails for, click the **browse** icon to select the enrollment confirmation email template.
Enrollment Pending Notification Waitlisted Notification Withdrawal Notification Approved Notification Denied Notification Session Transfer Notification New Sessions Available Notification Policy Remarks	Optionally, click the **browse** icon for each notification type to select the email template to use. They are all optional—if you leave any blank the LMS will not send a notification email for it.
Policy Remarks	Optionally, enter any remarks for the policy. These remarks appear only in the Enrollment Policy Summary in the Enrollment Policy Editor.
Allow approval withdrawal	If the enrollment policy is to include enrollment approval, by default learners can withdraw their enrollment request while waiting for approval. To disallow learners from withdrawing their enrollment request while waiting for enrollment approval, clear the **Allow approval withdrawal** check box.
Prompt user for reason for the withdrawal	If learners are allowed to withdraw their enrollment approval request, select the **Prompt user for reason for the withdrawal** check box if you want them to provide a reason.
Consider organization level payment plan options	Select the **Consider organization level payment plan options** check box if you want to use the payment plan set up for the learners' organization.

Parallel Approval Steps	If the enrollment policy is to include multiple parallel approval steps, select whether the first approval response determines the enrollment approval, or whether all parallel approval steps must succeed for the enrollment to be approved.

Additional Information

About Enrollment Policies

Create an Enrollment Policy

Withdrawal Details

Administrators with unrestricted access to the Enrollment Policy Editor can configure a single-step withdrawal approval workflow, described in the table below.

When a learner sends a withdrawal request, a notification is sent to the withdrawal approver and the learner's transcript is updated to reflect that they have requested withdrawal. While they are waiting for approval, the learner may still perform normal activities on the program or course (for example, launch it or take an exam). The learner cannot change the status of the course (for example, mark it as Completed). Status changes caused by the LMS (as a result of the learner's activity or a routine scheduled task), are still actively in force.

> ⓘ When a transcript flagged for withdrawal has changed to an end-point status, the pending withdrawal request becomes outdated and is automatically cancelled. The following transcript statuses are considered end-point statuses:
>
> - Completed
> - Waiver/Exempt
> - Passed
> - Deadline Expired
> - No Show
> - Failed
> - Cancelled

Table: Enrollment Policy Withdrawal Details

Field	Description
Enter withdrawal details below	If the enrollment policy allows learners to withdraw their enrollment, you can enter withdrawal instructions in this text box. For example, you can ask learners to withdraw only up to a certain number of days before the start of the course.
Enable withdrawal approval	Select this check box if you want an approver (for example, the learner's direct appraiser) to approve the learner's enrollment withdrawal.
Allow user to cancel withdrawal request	Select this check box if you want to allow learners to cancel their enrollment withdrawal requests. This applies only when you enable withdrawal approval. If the enrollment policy does not require withdrawal approval then learners are withdrawn from the enrollment immediately.

Approver Selection Type	If you have enabled withdrawal approval, select from the drop-down list the type of approver who will review and take action on withdrawal requests. This can be: • The default system approver, as assigned in the learner's logical domain • The learner's direct appraiser • The approver selected in the Designated Approver field • The approver in the learner's organization
Designated Approver	If you have enabled withdrawal approval and selected **User Approver Entered Below** from the Approver Selection Type list, click the **browse** icon to select the approver. (You may need to click **Save** on the toolbar to enable the Designated Approver field.)
Approval Request	If you have enabled withdrawal approval, click the **browse** icon to select the email template to be used to send out a withdrawal request notification when the learner requests withdrawal from a course or program.
Cost/Enrollment Information % of Course Fee Refunded / Number of Days Before Module Start Date	Specify the refund amount as a percentage of the full cost of *enrollment* to be refunded or credited to the learner upon withdrawal from a course within a certain number of days. Click **Add >>** to enter different refund percentages for different numbers of days before the start date. For example, you can specify a lower percentage refund closer to the start date.
Optional Payment Items % of Cost Refunded / Number of Days Before Module Start Date	Specify the refund amount as a percentage of the full cost of any *optional payment items* to be refunded or credited to the learner upon withdrawal from a course within a certain number of days. Click **Add >>** to enter different refund percentages for different numbers of days before the start date. For example, you can specify a lower percentage refund closer to the start date.

Additional Information

Configure Cost Information for a Learning Module

About Enrollment Policies

About Optional Payment Items

Clone an Enrollment Policy

You may wish to clone an enrollment policy to quickly create one based on a similar existing policy. You can then edit the new copy as required, which can require fewer changes than creating a new policy from scratch.

Administrators with unrestricted access to the Enrollment Policy Editor can clone an Enrollment Policy.

To clone an enrollment policy

1. Go to **Manage Center > Learning > Enrollment Policy Editor**. The Enrollment Policy Editor opens in a new window.

2. In the Policies tab, expand the policy you want to clone.

3. Click **Edit policy details**. The Enrollment Policy Details page opens.

4. Click the **Clone** icon on the toolbar. The new copy of the policy details opens with *Copy of-* prepended to the name of the original policy.

5. Edit the policy as required.

Additional Information

Edit an Enrollment Policy

Enrollment Policy Details

Withdrawal Details

About Enrollment Policies

Edit an Enrollment Policy

Administrators with unrestricted access to the Enrollment Policy Editor can edit any enrollment policy for which you have been assigned unrestricted access, including the Default Policy and Default Two-Step Enrollment Policy.

> ⚠️ The default policies are reset when the LMS is upgraded to a new version, so any changes made to them are lost. Instead of editing the default policies, PeopleFluent recommends cloning them to create a copy that you can edit, which will not be lost during upgrades.

To edit an enrollment policy

1. Go to **Manage Center > Learning > Enrollment Policy Editor**. The Enrollment Policy Editor opens in a new window.

2. In the Policies tab, expand the policy you want to edit.

3. Click one of the **Edit...** links to edit that part of the policy.

4. When you have finished editing a page, click the **Save** icon.

Additional Information

Enrollment Policy Details

Withdrawal Details

About Enrollment Policies

Create an Enrollment Policy

Clone an Enrollment Policy

About the Default Enrollment Policy

Delete an Enrollment Policy

Administrators with unrestricted access to the Enrollment Policy Editor can delete any enrollment policy to which you have unrestricted access. You cannot, however, delete the Default Policy or Default Two-Step Policy.

You can delete one or more policies at once using the Batch Delete function in the Policy Editor.

To delete one or more enrollment policies

1. Go to **Manage Center > Learning > Enrollment Policy Editor**. The Enrollment Policy Editor opens in a new window.

2. Click the **Batch Delete** icon on the toolbar. The Batch Delete page opens, listing all of the enrollment policies.

3. Select the check boxes of the policies you want to delete and click **Delete**. You are asked to confirm the deletion.

Additional Information

About Enrollment Policies

Edit an Enrollment Policy

About the Auto-Enroll Console

Administrators with unrestricted access to the Auto-Enroll Console can configure settings for the auto-enroll scanning interval, view a list of users that are auto-enrolled and the list of targeted courses, and check the auto-enrollment log. For course sessions that have auto-enrollment criteria configured, you can specify when and how often the LMS scans user accounts for people who match the criteria. Users who match are then automatically enrolled in the session.

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

To open the Auto-Enroll Console, go to **Manage Center > Learning > Auto-Enroll Console**.

The Auto-Enroll Console page contains the following tabs:

- Auto-Enroll Console
- Auto-Enroll User Listing
- Auto-Enroll Log
- Targeted Courses
- Auto-Enroll Statistics

Additional Information

Auto-Enroll Console tab

List Users Auto-Enrolled in a Course

Auto-Enroll Log

Target Courses

Configure Auto Enrollment Criteria

Auto-Enroll Console tab

The Auto-Enroll Console tab has two sections in which you configure when the LMS scans for users to automatically enroll in sessions with auto-enrollment criteria. Administrators with unrestricted access to the *Auto-Enroll Console* feature in System Roles (Manage Features > Catalog Manage Features) can enable and disable auto-enroll scanning.

At login, a check is typically made against course auto-enroll criteria if the criteria or user has changed since the previous check. The options on this page enable you to ensure that new checks are done at a guaranteed interval, even if there are no obvious changes.

To open the Auto-Enroll Console tab, go to **Manage Center > Learning > Auto-Enroll Console > Auto-Enroll Console tab**.

Turn on Online/Login Auto-Enroll

To enable auto-enroll scanning, select the **Turn on Online/Login Auto-Enroll** check box. You can then select an option from the drop-down list to specify when the LMS checks user accounts against auto-enroll criteria:

- Initiate New Check Only When Individual Module Criteria Or User Attributes Change

- Initiate New Check For Every Targeted Course At Every Login

- Initiate New Check For Every Targeted Course Each Week

- Initiate New Check For Every Targeted Course Each Month

Changing this option will impact the *criteria check needed* time stamp of every course. You can cause a new scan check for a specific course by updating the selection criteria in the Auto-Enroll Properties for a session. Likewise, you can cause a specific user to be scanned again by updating any of their properties in the User Editor. Both of these actions reset time stamps for individual users or courses.

Select the **Enable online SubModule handling** check box to also scan for auto-enrollments into sub-modules as part of currently enrolled programs. If not enabled, this process will still run as part of the *Auto Enroll Offline Sub-module Scan* daily task (unless offline auto-enrollment is deactivated).

Turn on Offline Bulk Auto-Enroll

Offline auto-enroll will enable users who have not logged in to be scanned and enrolled in courses (and notified by email). This option is turned off by default as it can impact system performance. Of the following options, PeopleFluent recommends the trickle option, which processes batches of approximately 1/30 of the active users on a daily basis, with all users scanned over a one month period.

The following options are available:

- Daily Incremental

- Trickle Auto-enroll All Active Users Over One Month Period

- All Active Users Once per Day

- All Active Users Once per Week

- All Active Users Once per Month

Additional Information

About the Auto-Enroll Console

List Users Auto-Enrolled in a Course

Auto-Enroll Log

Target Courses

Configure Auto Enrollment Criteria

List Users Auto-Enrolled in a Course

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

Administrators with read-only access to the *Auto-Enroll Console* feature in System Roles (Manage Features > Catalog Manage Features) can list users auto-enrolled in a course.

To list users auto-enrolled in a learning module

1. Go to **Manage Center > Learning > Auto-Enroll Console**.

2. Click **Auto-Enroll User Listing**.

3. Click **Select** to select a learning module. The Selector page opens in the new window, in which you can search for a learning module. You can select only one module to list auto-enrollments for.

4. Select the start and end dates and times of the automatic enrollment.

5. Click **Filter** to list the users who were auto-enrolled.

Additional Information

About the Auto-Enroll Console

Configure Auto Enrollment Criteria

Auto-Enroll Log

Administrators with read-only access to the Auto-Enroll Console can view the auto-enroll process log for the most recent 30 days in the Auto-Enroll Log tab. It tells you which learners were processed for auto-enrollment, the learning module and session ID for enrollment, and the date and time of the auto-enroll processing. The Message column provides auto-enrollment processing information for each event, such as successful enrollment or whether the learning's enrollment is still awaiting approval.

To open the Auto-Enroll Log, go to **Manage Center > Learning > Auto-Enroll Log**.

You can filter the log entries on the following properties:

- User Name

- Learning Module ID

- Event start and end dates

Additional Information

About the Auto-Enroll Console

Auto-Enroll Console tab

List Users Auto-Enrolled in a Course

Target Courses

Targeted Courses

In the Targeted Courses tab Administrators with read-only access to the Auto-Enroll Console feature can view a list of the learning modules that have auto-enrollment criteria configured. If your organization has many courses that auto-enroll learners, you can filter the list by learning module ID, and the dates between which auto-enrollment was activated.

To open the Auto-Enroll Console, go to **Manage Center > Learning > Auto-Enroll Console**.

Additional Information

About the Auto-Enroll Console

Auto-Enroll Console tab

List Users Auto-Enrolled in a Course

Auto-Enroll Log

About the Repository Manager

Administrators with unrestricted access to the *Repository Manager* feature in System Roles (Manage Features > Manage Features) can upload and manage files for the LMS in the Repository Manager. They might include course files for learners and instructors, certificates, course or training center information, and images used for course catalogs.

In the Repository Manager you can:

- Create folders and manage their properties and access permissions

- Delete folders and their contents

- Upload files and manage their properties and access permissions

- Delete files

- Replace files

- Move or copy files between folders

To open the Repository Manager, go to **Manage Center > Learning > Repository Manager**. The Repository Manager opens in a new window.

The Repository Manager has two areas:

- Personal Folders

- Shared Public Folders

Personal Folders lists the folders and files you have created. Shared Public Folders lists the folders and files that other administrators have created and shared with you, by configuring their permissions.

Additional Information

Create a Folder

Update Folder Properties

Configure Folder Access Permissions

Delete a Folder

Upload a File to the Repository

Update File Properties

Configure File Access Permissions

Delete Files from the Repository

Replace a File in the Repository

Move or Copy a File

Create a Folder

Administrators with unrestricted access to the *Repository Manager* feature in System Roles (Manage Features > Manage Features) can create folders to organize the files used throughout the LMS, and provide access to the appropriate users.

> When deciding how to create a folder structure, it might help to think about how you want to organize your files. For example, by department, by course or course type, by organization. You can then set the permissions on these folders and they will be applied by default to their files and sub-folders accordingly.

When you create a new folder it is added to Personal Folders. Folders created by other users are listed under Shared Public folders (if they have given you permission to access them).

After you create a folder, you can set its access permissions if other LMS users—including learners—need to access it. You may also update its properties if you do not want its files and sub-folders to inherit its access permissions (so you can configure them individually).

To create a new folder

1. Go to **Manage Center > Learning > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.

2. Click **Create folder**.

3. Enter a folder name and, optionally, a description, and then click **Create**.

4. Optionally, click the **Permissions** link to update the folder properties.

5. Optionally, click the **Properties** link to configure the folder's access permissions.

6. Click **Back to Repository**. The new folder is appended to the list. (You may need to click **Refresh** to see the new folder in the Folders tab.)

Additional Information

[Configure Folder Access Permissions](#)

[Update Folder Properties](#)

[Delete a Folder](#)

[Upload a File to the Repository](#)

Update Folder Properties

Administrators with unrestricted access to the *Repository Manager* feature in System Roles (Manage Features > Manage Features) and unrestricted access to an existing folder can update its properties. You can change its name and description, and choose whether its files and sub-folders inherit its access permissions.

To update a folder's properties

1. Go to **Manage Center > Learning > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.

2. Click the **[Properties]** link of the folder you want to update. The folder's Overview page opens.

3. Update the folder name and description as required.

4. If you do not want the files or sub-folders in this folder to inherit its access permissions, clear the **Folder permissions are inherited by subfolders** check box. You can then set permissions for its files and sub-folders individually.

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

Additional Information

Create a Folder

Configure Folder Access Permissions

Configure File Access Permissions

Delete a Folder

Configure Folder Access Permissions

After you create a folder, you can set its access permissions if other LMS users, including learners, need to access the files in it. You can configure the permissions for a folder only if it does not inherit them from its parent folder.

Administrators with unrestricted access to the *Repository Manager* feature in System Roles (Manage Features > Manage Features) and unrestricted access permission on the folder can set the access permissions for it.

To set the access permissions for a folder

1. Go to **Manage Center > Learning > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.

2. Click the **[Properties]** link of the folder you want to set access permissions for. The folder's Overview page opens.

3. If you do not its files or sub-folders to inherit the permissions you set for the folder, clear the **Folder permissions are inherited by subfolders** check box.

4. Click **Permissions** The Permissions Selector opens in a new window.

5. Assign the Read Only and Unrestricted Access permissions as required. For example, to enable all learners to view the files in a folder, 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 Folder's Overview page.

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

Additional Information

Permissions

Update Folder Properties

Create a Folder

Delete a Folder

Upload a File to the Repository

Delete a Folder

If you have unrestricted access to the *Repository Manager* feature in System Roles (Manage Features > Manage Features) and unrestricted access permission to an existing folder in the repository, you can delete it. When you delete a folder, its contents are also deleted. However, you cannot delete a folder if any of its files are referenced elsewhere in the LMS (for example, as a learning module reference, or a certificate).

To delete a folder

1. Go to **Manage Center > Learning > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.

2. Select the check box of the folder you want to delete.

3. Click **Delete**. You are asked to confirm the deletion.

Additional Information

About the Repository Manager

Create a Folder

Permissions

Upload a File to the Repository

Administrators with unrestricted access to the *Repository Manager* feature in System Roles (Manage Features > Manage Features) can upload files to folders in the repository and share them with other LMS users. Examples of files that you might need to upload to the repository include course resources (references), certificates, and catalog or course images.

To upload multiple files, ZIP them and upload the zipped folder. When you upload the file it detects a ZIP file and asks if you want to extract the files from it. When the files are extracted, the LMS adds the same description (the filename) to all files, so you may wish 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 you must update the parent folder's properties so that its access permissions are not inherited by its files and sub-folders.

> ⓘ   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.

To upload a file to the repository

1. Go to **Manage Center > Learning > 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.

Additional Information

Update File Properties

Configure File Access Permissions

Configure Folder Access Permissions

Delete Files from the Repository

Replace a File in the Repository

Move or Copy a File

Update File Properties

Administrators with unrestricted access to the *Repository Manager* feature in System Roles (Manage Features > Manage Features) and unrestricted access to a file in the repository can update its properties. You can change its name and description, and update its access permissions if it doesn't inherit them from its parent folder.

To update a folder's properties

1. Go to **Manage Center > Learning > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.

2. Click the folder containing the file whose properties you want to update. The folder's Overview page opens, where you can see its files and sub-folders.

3. Click the **[Properties]** link of the file you want to update. The file's Overview page opens.

4. Update the file name and description as required.

5. Optionally, click **Permissions** to configure the file access permissions the Permissions Selector.

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

Additional Information

About the Repository Manager

Upload a File to the Repository

Configure File Access Permissions

Delete Files from the Repository

Replace a File in the Repository

Move or Copy a File

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

Additional Information

Permissions

Update Folder Properties

Configure Folder Access Permissions

Upload a File to the Repository

Delete Files from the Repository

You can delete files from the repository that you no longer need to host in the LMS. Deleting redundant files (and folders) can help to keep your file repository organized and easier to manage.

You must have unrestricted access to the *Repository Manager* feature in System Roles (Manage Features > Manage Features) and unrestricted access permission to a file to delete it, and you cannot delete a file if it is referenced elsewhere in the LMS (for example, as a learning module reference, or a certificate).

To delete files from the repository

1. Go to **Manage Center > Learning > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.

2. Click the folder you want to delete one or more files from. The folder's Overview page opens, where you can see its files and sub-folders.

3. Select the check boxes of the files you want to delete and then click **Delete**. You are asked to confirm the deletion.

Additional Information

Upload a File to the Repository

Replace a File in the Repository

Move or Copy a File

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.

Administrators with unrestricted access to the *Repository Manager* feature in System Roles (Manage Features > Manage Features) and unrestricted access permission to a file can replace it.

To replace a file with a new version

1. Go to **Manage Center > Learning > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.

2. Click the folder containing the file you want to replace. The folder's Overview page opens, where you can see its files and sub-folders.

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.

Additional Information

Update File Properties

Configure File Access Permissions

Delete Files from the Repository

Move or Copy a File

Move or Copy a File

You can copy and paste files to duplicate them, or cut and paste them to move them from one folder to another in the repository. When you cut files from a folder and paste them into a different folder, the LMS keeps track of their new location.

Administrators with unrestricted access to the *Repository Manager* feature in System Roles (Manage Features > Manage Features) and unrestricted access to a file can remove it from a repository folder.

> ⚠️ When you paste files into a different folder their previous access permissions (either inherited or file-specific) are removed and they inherit the permissions from their new parent folder.

To move or copy files to a different folder

1. Go to **Manage Center > Learning > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.

2. Click the folder containing the files you want to move or copy. The folder's Overview page opens, where you can see its files and sub-folders.

3. Select the check box of the files you want to move or copy, and then click either **Cut** or **Copy** to move or duplicate the files respectively.

4. Navigate to the repository folder where you want to move or copy the files to and click **Paste**. The selected files are moved or copied as appropriate.

Additional Information

Configure File Access Permissions

Delete Files from the Repository

Replace a File in the Repository

About Payment Plans

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

Payment plans can be created to specify different charging options for different groups of users, enabling organizations to charge different amounts for the same course to different target groups of learners.

You can assign a payment plan to one or more organizations from the Organization Maintenance page.

Payment plans can specify:

- Allowances for online payment

- Usage-limited and date-limited discounts

- Provisions for pre-payments (either through the use of currency, coupons or tokens)

- Discount thresholds or expiration

To create payment plans:

- Online payments and at least one payment gateway must be configured for your LMS.

- Your user role must have unrestricted access to the *Payment Plans and Optional Payment Items* feature in System Roles.

Table: Does your organization need a payment plan?

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

Additional Information

System Configuration for Online Payments

Create a Payment Plan

Edit a Payment Plan

About Online Payments

There are several areas of the LMS you need to configure to enable online payments to pay for courses:

- System configuration for online payments

- Setting up payment plans

- Configuring learning module or session cost information to accept online payment

Optionally, if your organization uses a payment gateway not supported by the LMS, a payment plugin must be configured. This usually occurs as part of the LMS implementation and is beyond the scope of this help system.

First task: System Configuration for Online Payments

Additional Information

System Configuration for Online Payments

About Payment Plans

Create a Payment Plan

Configure Cost Information for a Learning Module

Configure Cost Information for a Session

System Configuration for Online Payments

System administrators must enable online payments in System Configuration before online payments can be configured for a course.

After enabling online payments, you can create payment plans.

To configure the LMS to accept online payment

1. Go to **Manage Center > System > System Configuration**. The System Configuration page opens.

2. Select **Online Payment** from the Category drop-down list.

3. Select the **Online Payment** check box.

4. If you want to allow an approver to pay for a learner's enrollment, select the **Allow enrollment approval with online payment** check box.

5. To enable learners or approvers to enter credit card details, select the **Enable international credit card input form** check box.

6. Select the remaining online payment system configuration options as required.

7. Click **Save**.

Additional Information

About Payment Plans

Create a Payment Plan

Create a Payment Plan

You can create a payment plan to specify how users belonging to an organization can pay online for courses and other optional payment items. Your user role must have unrestricted access to the *Payment Plans and Optional Payment Items* feature in System Roles.

After creating a payment plan, you can configure the cost information for the appropriate learning modules or sessions.

To create a payment plan

1. Go to **Manage Center > Learning > Payment Plans**. The Payment Plans page opens, listing any existing payment plans.

2. Click **+ Create Payment Plan**. The page refreshes to show the new payment plan's properties.

3. Enter the payment plan properties.

4. Click **Save**. The payment plan is added to the list in the Payment Plans page.

Additional Information

Payment Plan Properties Reference

Edit a Payment Plan

About Payment Plans

Configure Cost Information for a Learning Module

Configure Cost Information for a Session

Payment Plan Properties Reference

Use the table below to help you configure a payment plan. Your user role must have unrestricted access to the *Payment Plans and Optional Payment Items* feature in System Roles.

To access payment plan properties

1. Go to **Manage Center > Learning > Payment Plans**. The Payment Plans page opens, listing any existing payment plans.

2. Create or edit a payment plan. The page refreshes to show the payment plan's properties.

Table: Payment Plan Properties

Field	Description
Title	Enter a name for the payment plan. This field is mandatory.
All enrollments use online payment?	Select this check box if all enrollments use online payment.
Allow payment by organization's credit card?	Select this box to allow learners on this payment plan to pay for enrollments using the credit card of the organization the plan is assigned to.
Purchase order reference required?	If the payment plan allows payment by the organization's credit card, select this check box if a purchase order reference is required for each enrollment.
Allow payment by organization's account?	Select this check box to allow the learner's organization to pay for courses with online payments.
Purchase order reference required?	If the payment plan allows payment by the organization's account, select this check box if a purchase order reference is required for each enrollment.
All enrollments have been prepaid?	Select this check box if all enrollments using this payment plan have been prepaid. Learners will not need to pay at the time of enrollment.
Prepaid Expiration Date	Select the date on which prepayment for enrollments expires. Learners will have to pay for enrollments after this date.
Date-limited Discount %	Enter the percentage discount on enrollments using this payment plan.
Discount Expiration Date	Select the date on which the discount for enrollments expires.
Usage Discount %	Enter the percentage discount to apply for a minimum number of enrollments using this payment plan.
# Enrollments Required for Discount	Enter the minimum number of enrollments required before the usage discount is applied.

Additional Information

About Payment Plans

Create a Payment Plan

Edit a Payment Plan

Edit a Payment Plan

You can edit a payment plan to change the way users belonging to an organization can pay online for courses and other optional payment items. You can also delete a payment plan when you edit it. To edit payment plans, your user role must have unrestricted access to the *Payment Plans and Optional Payment Items* feature in System Roles (Manage Features > Payment Manager).

To edit or delete a payment plan

1. Go to **Manage Center > Learning > Payment Plans**. The Payment Plans page opens, listing any existing payment plans.

2. Click the **Edit** link for the payment plan you want to edit. The page refreshes to show the payment plan's properties.

3. Update the payment plan properties as required.

4. Click **Save**.

5. To delete a payment plan, click **Delete**.

Additional Information

Payment Plan Properties Reference

Create a Payment Plan

About Payment Plans

Create a Cost Accounting Category

Administrators can create cost accounting categories to categorize additional costs associated with course sessions. When you create a cost accounting category it becomes available in the Cost Accounting Information page in learning modules' session properties.

To create a cost accounting category

1. Go to **Manage Center > Learning > Cost Accounting Categories**. The Cost Accounting Categories page opens, listing any existing categories.

2. Click **+ Create Accounting Category**. A modal dialog appears.

3. Enter the category name and click **Save**. The new category is added to the list in the Cost Accounting Categories page.

Additional Information

Enter Additional Cost Accounting Information

Edit or Delete a Cost Accounting Category

Edit or Delete a Cost Accounting Category

Administrators can edit a cost accounting category to change its name. Cost accounting categories are used in the Cost Accounting Information page in learning modules' session properties.

To edit or delete a cost accounting category

1. Go to **Manage Center > Learning > Cost Accounting Categories**. The Cost Accounting Categories page opens, listing any existing categories.

2. Click the action menu of the category to edit or delete and select either **Edit Cost Accounting Category** or **Delete Cost Accounting Category**.

Additional Information

Create a Cost Accounting Category

Enter Additional Cost Accounting Information

About Optional Payment Items

Optional Payment Items are resources that learners can buy when they buy a course which is configured for online payment. You may wish to set up optional payment items for generic categories of items that are available for multiple courses, such as participant packs or accommodation.

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

To manage optional payment items, go to **Manage Center > Learning > Optional Payment Items**.

Additional Information

Create an Optional Payment Item

Update or Delete an Optional Payment Item

Create an Optional Payment Item

Course administrators can create an optional payment item for courses that are paid for using online payment gateways. Optional payment items are listed in the Cost Information page in the Catalog Editor (but enabled only for the *Online Payment* charge procedure).

To create an optional payment item

1. Go to **Manage Center > Learning > Optional Payment Items**. The optional Payment Items page opens, listing any existing items.

2. Click **+ Add Payment Item**. The optional Payment Item page opens.

3. Enter the name of the item.

4. Optionally, enter the translation label key if you want the item to be displayed in other languages. Leave this field blank to use the value provided for the item name.

5. Optionally, enter a description for the item.

6. Click **Add** to save the item.

Additional Information

About Optional Payment Items

Update or Delete an Optional Payment Item

Update or Delete an Optional Payment Item

Course administrators can update or delete optional payment items.

To update or delete an optional payment item

1. Go to **Manage Center > Learning > Optional Payment Items**. The optional Payment Items page opens, listing any existing items.

2. Click the name of the item to update or delete. The Optional Payment Item page opens.

3. To update the item, edit its properties as required and click **Update**.

4. To delete the item, click **Delete**.

Additional Information

About Optional Payment Items

Create an Optional Payment Item

View Course Payment History

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

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

To open the Course Payment History, go to **Manage Center > Learning > Payment History**.

On the Payment History page you can:

- Search for transactions

  To search for transactions, either enter the transaction number and click **Retrieve**, or enter the User ID and/or From Date and/or To date, and click **Search**.

- Mark transactions as reviewed (or not reviewed)

  To mark transactions as *reviewed* or *not reviewed*, select the check box of one or more transactions and click **Mark as reviewed** or **Mark as not reviewed**.

- Create a PDF invoice

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

  To create the invoice, select the transaction you want to create the invoice for and click the **Invoice** link at the bottom of the transaction details. The LMS creates a PDF which you can view or save from your browser.

- Change the status of an enrollment for which a payment was made

  To change the status of an enrollment

  1. Select the transaction corresponding to the enrollment. The Payment History page opens for the transaction.

  2. In the Transaction Enrollments section, select the new enrollment status from the Overall Status Change drop-down list.

  3. Click **Apply Changes**. The Overall Status is updated.

Additional Information

[About Payment Plans](#)

About Token Payments

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

When learners or their approvers pay for a course enrollment with tokens:

- They must have the required amount of tokens in their account.

- The course's Charge Procedure (in the Catalog Editor's Cost Information page) must be set to Online Payment.

- At enrollment the tokens are deducted from the learner or approver, not from their organization's token account.

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

- The course's Charge Procedure must be set to Organization One Off Token Payment.

- In the course Cost Information page, the course administrator selects the organization to charge. Once the tokens have been deducted from the organization's token account, members of that organization can enroll in the course without further charge.

- The tokens are taken from the first value balance (that hasn't expired) in the organization token account list.

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

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

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

You can use the Token Account Data Loader to create token accounts, and to update organization and user tokens in bulk. To import token account data, your user role must have unrestricted access to the *Token Account Data Loader* feature in System Roles (Manage Features > Payment Manager).

Additional Information

System Configuration for Token Payments

Create an Organization Token Account

Create a Token Package

View Course Payment History

About the Token Account Data Loader

Pay for Course Enrollment with a One-off Token Payment

About the Token Account Data Loader

System Configuration for Token Payments

To configure the LMS for token payments, your user role must have access to the *System Administration* and *System Configuration* features.

To enable payment of courses using token payments

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 *Enforce Token-Processing Business Logic* setting, select **Enforce for self-enrollments and enrollment wizard** from the drop-down list.

4. Select **Online Payment** from the Category drop-down list.

5. Select the **Enable online payment** check box. Select the **Allow enrollment approval with online payment** check box.

6. Click **Save** to save the system configuration settings.

To select the payer for token payments

1. Select **Online Payment** from the Category drop-down list.

2. Select either **Final Approver** or **Enrollment Requester** for the setting *In approval workflows, tokens are paid by*, depending on your organization's requirements.

To appoint the LMS users responsible for token payment administration

1. Go to **Manage Center > Users > System Roles**. The System Roles page opens.

2. Select a role to assign the required access controls. The Access Control for Role page opens.

3. Select **Manage Features > Payment Manager**.

4. Select **Unrestricted** for *Token Packages* and *Organization Token Accounts*.

5. Select **Data Access Control > Role General Permissions**.

6. Select **Yes** for both *Show Tokens Tab* and *Allow Token Manual Adjustment*.

7. Click **Update access control settings** to save the role access settings.

Additional Information

About Token Payments

Create an Organization Token Account

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

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

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

To create an organization token account

1. Go to **Manage Center > Learning > Organization Token Accounts**. The Organization Token Accounts page opens.

2. Click **+ Create new token account**. The Create New Organization Token Account page opens.

3. Enter a unique Account Name and then click **+ Create Token Value**.

4. Enter the Token Value and, if applicable, an Expiry Date.

5. Repeat steps 3 and 4 to add more token values, if required.

6. Click **Save**.

Additional Information

Associate an Organization Token Account with an Organization

Update Tokens in an Organization Token Account

About Token Payments

Permissions

Associate an Organization Token Account with an Organization

To use an organization token account you must first link it to an organization. To edit an organization your user role must have unrestricted access to the *Allow Organization Maintenance* Data Access Control.

> ⓘ Associating a token account with a parent organization does not associate it with that organization's child organizations.

To associate an organization token account with an organization

1. Go to **Manage Center > Users > Organization Maintenance**. The Organization Maintenance page opens.

2. Right-click on the organization you want to associate the organization token account with and select **Edit**. The Edit Organization page opens.

3. In the Enrollment & Payment section, select the token account to associate with the organization.

4. Click **Save**.

Additional Information

Create an Organization Token Account

Update Tokens in an Organization Token Account

About Token Payments

Create a Token Package

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

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

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

To create a token package

1. Go to **Manage Center > Learning > Token Packages**. The Token Packages page opens with a list of existing token packages.

2. Click **+ Create Token Package**. The Create New Token Package page opens.

3. Enter the token package details. For more information, see Token Package Field Reference.

4. Click **Save**. The new token package is added to the list in the Token Packages page.

Additional Information

Token Package Field Reference

Permissions

About Token Payments

Token Package Field Reference

Use the field descriptions in the following table to help you create and edit token packages.

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

To access token packages

1. Go to **Manage Center > Learning > Token Packages**. The Token Packages page opens with a list of existing token packages.

2. Create or edit a token package.

Table: Token package field descriptions

Field	Description
Package Name	Enter a unique name to identify the token package. This field is mandatory.
Label Key	For multi-language systems, you can enter the text label key for *Package Name* in the custom *.properties* file and the LMS will automatically display the translated label value.
Status	Select the status of the token package (Active or Suspended). Only active packages can be bought.
Tax Rate	Enter the Tax Rate as a percentage.
Net Cost	Enter the net cost of the package (the cost excluding tax). The Total Cost is calculated according to the Tax Rate. You can leave this field blank and enter the Total Cost instead. The Net Cost is then calculated based on the Tax Rate.
Tax	Shows the portion of the Total Cost attributed to tax.
Total Cost	If you have not entered a Net Cost figure, enter the Total Cost of the token package including tax. The Net Cost is calculated based on the Total Cost and Tax Rate. The Total Cost is the amount paid to buy the package.
Currency	Select the currency used to buy the token package.
Token Value	Enter the number of tokens in the package. When a user buys one unit of this package, the Token Value is credited to the organization's token account.

Package Expiry	Use one of the following fields to specify the package expiry:
	• Set Date—select a date in the calendar control on which the package will expire. Expired token packages are not available for purchase.
	• Expires in—enter the number of days after purchase when the package will expire.

Additional Information

Create a Token Package

About Token Payments

Add Tokens to a User's Token Account

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

To add or update a user's token account your user role must have unrestricted access to the *User Manager* and *Users* features in System Roles (Manage Features > User Manager Features).

You must also have data access permission for *Show Tokens Tab* and *Allow Token Manuel Adjustment* in System Roles (Data Access Control > Role General Permissions).

To add tokens to a user's token account

1. Go to **Manage Center > Users > Users**. Select the user whose token account you want to update. The User Editor opens in the new window.

2. Click **Token Account**.

3. If the user has no tokens, enter the Token Value. Alternatively, to add or remove tokens from an existing balance, enter the New Token Value.

4. Enter the Expiry Date for the tokens, if required. The user cannot use the tokens after the expiry date.

5. Click **Adjust/add tokens** to update the user's token account.

6. Repeat steps 3 to 5 to add tokens with different expiry dates, if required.

Additional Information

About Token Payments

About the Token Account Data Loader

Update Tokens in an Organization Token Account

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

- Adding discrete token values with expiry dates, if required

- Updating the organization's token values

- Deleting token values

- Transferring some or all of a token value to another organization

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

To update the tokens in an organization token account

1. Go to **Manage Center > Learning > Organization Token Accounts**. The Organization Token Accounts page opens.

2. Click the name of the token account to update. The Edit Organization Token Account page opens, listing the token values that have been added to the account.

3. To update a token value directly, click it and enter the updated value.

4. To add a new token value, which can have its own expiry date, click **+ Create Token Value**.

5. To delete a token value, select **Delete** from its action menu.

6. To transfer tokens to another organization, select **Transfer** from its action menu. The Token Transfer dialog opens where you select the organization and number of tokens to transfer to it.

Additional Information

Create an Organization Token Account

Associate an Organization Token Account with an Organization

About Token Payments

Pay for Course Enrollment with a One-off Token Payment

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

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

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

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to deduct a token payment for. The Catalog Editor opens at the Define Module Properties page.

2. To deduct a token payment for a specific session, Click **Session Properties** and select the session to edit. Otherwise go to step 3.

3. Click **Enter cost information** in the Session Properties or Module Properties tab. The Cost Information page opens.

4. Select **Organization One Off Token Payment** from the Charge Procedure drop-down list.

5. In the Cost field enter the number of tokens to deduct to pay for the enrollments of all members of an organization.

6. Click **Deduct Payment**. The Select Organization dialog opens.

7. Click the **Select Organization** link to select one or more organizations from which to deduct the token payment.

8. If you want to keep the organization constraints, clear the **Adjust Organization Constraints** check box.

9. Click **Continue** and then **Confirm Payment** to deduct the token payment. The organizations from which the token payment was deducted are listed in the Related Token Transactions section.

Additional Information

Refund a One-off Token Payment

Configure Cost Information for a Learning Module

Configure Cost Information for a Session

About Token Payments

Refund a One-off Token Payment

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

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

To refund a one-off token amount to an organization

1. Go to **Manage Center > Learning > Learning Modules** and click the name of the module you want to refund a token payment for. The Catalog Editor opens at the Define Module Properties page.

2. To refund a token payment for a specific session, Click **Session Properties** and select the session to edit. Otherwise go to step 3.

3. Click **Enter cost information** in the Session Properties or Module Properties tab. The Cost Information page opens with a list of organization token payments in the Related Token Transactions section.

4. Click **Refund** for the token payment you want to refund. The Refund dialog opens.

5. If you want to keep the organization constraint adjustments that were made when the token payment was made, clear the **Adjust Organization Constraints** check box.

6. Click **Confirm Refund**. The refund is added to the list of token transactions and the tokens are credited to the organization's token account.

Additional Information

Pay for Course Enrollment with a One-off Token Payment

Configure Cost Information for a Learning Module

Configure Cost Information for a Session

About Token Payments

About the Token Account Data Loader

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

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

To **initialize** a token account, your CSV file must have values for *Action* and either *Level1Desc* or *UserID*. In addition, if you leave the TokenAccountName field blank, it is derived from the organization structure given in the organization level(s) or from the UserID.

To **delete** a token account, your CSV file must have values for *Action* and *TokenAccountName*. If more than one token account matches the TokenAccountName in the CSV files, the delete action will fail.

To **add** tokens to a token account, your CSV file must have values for *Action*, *TokenValue*, and either the organization (at least *Level1Desc*), or the *UserID*.

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

To import token account data, go to **Manage Center > Learning > Token Account Data Loader**.

Additional Information

Import Token Account Data

Token Account Data Loader Field Reference

About Token Payments

Import Token Account Data

You can use the Token Account Data Loader to initialize (create) and delete organization token accounts, and add tokens to them. You must first populate a a comma—or semicolon—separated values (CSV) formatted file with token account data.

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

To import token account data

1. Go to **Manage Center > Learning > Token Account Data Loader**. The Token Account Data Loader page opens and lists your previous token account CSV imports, if any.

    To see previous CSV imports from any user, select **Anyone** from the Uploaded By drop-down list.

2. If required, download the CSV file template and enter the token account information in the relevant fields.

3. Click **+ Import CSV file**.

4. Click **Choose File** to select the CSV file to upload.

5. Optionally, enter a description for the upload.

6. If your CSV file was saved with a specific file encoding, the LMS can automatically detect it, otherwise you can select it from the *Encoding* list.

7. Select the delimiter used to separate fields in your CSV file. This is a comma in the downloadable CSV file template. Alternatively, you can use semicolons in your own CSV files.

8. Click **Preview**. The contents of the CSV file are shown in the Data Loader page so that you can review the data before importing the file.

9. Click **Upload** to import the CSV file. The Summary Report shows how many records in the file were imported successfully and how many failed.

10. To view the import log file or error report, go back to the Token Account Data Loader page.

Additional Information

Token Account Data Loader Field Reference

About the Token Account Data Loader

About Token Payments

Token Account Data Loader Field Reference

Use the reference table below to help you correctly format the token account data CSV file you want to import via the Token Account Data Loader.

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

To import token account data, go to **Manage Center > Learning > Token Account Data Loader**.

Table: Token Account Data Loader field reference

Field	Content	Data Handling	Default
Action		Must be I (Initialize), A (Add) or D (Delete). Case insensitive.	None
Level1Desc	Organization hierarchy level 1 description. This is the organization name of the top-level organization you want to create or delete a token account for, or add tokens to.	Any text. Can include spaces. Must not include the field delimiter or quotation marks. Maximum field length: 85.	None
Level2Desc	Organization hierarchy level 2 description. This is the organization name of the second-level organization you want to create or delete a token account for, or add tokens to. To target this organization, you must enter all organization levels in the hierarchy, starting at level 1 and ending at this level.	Any text. Can include spaces. Must not include the field delimiter or quotation marks. Maximum field length: 85.	None
Level3Desc	Organization hierarchy level 3 description. This is the organization name of the third-level organization you want to create or delete a token account for, or add tokens to. To target this organization, you must enter all organization levels in the hierarchy, starting at level 1 and ending at this level.	Any text. Can include spaces. Must not include the field delimiter or quotation marks. Maximum field length: 85.	None

Level4Desc	Organization hierarchy level 4 description. This is the organization name of the fourth-level organization you want to create or delete a token account for, or add tokens to. To target this organization, you must enter all organization levels in the hierarchy, starting at level 1 and ending at this level.	Any text. Can include spaces. Must not include the field delimiter or quotation marks. Maximum field length: 85.	None
Level5Desc	Organization hierarchy level 5 description. This is the organization name of the fifth-level organization you want to create or delete a token account for, or add tokens to. To target this organization, you must enter all organization levels in the hierarchy, starting at level 1 and ending at this level.	Any text. Can include spaces. Must not include the field delimiter or quotation marks. Maximum field length: 85.	None
UserId	LMS User ID. You can enter this to derive the user's organization to add tokens to.	A Unique ID That Conforms to the LMS ID constraints. Maximum field length: 85.	None
TokenAccountName	The name of the token account to create, delete or add tokens to.	Any text. Can include spaces. Must not include the field delimiter or quotation marks. Maximum field length: 200.	None
TokenValue	The token value to add to the token account.	Positive number.	None

ExpiryDate	Optional expiry date for the token value.	The following date formats are supported: • dd-mm-yy (e.g. "31-12-13") • dd-mm-yyyy (e.g. "31-12-2013") • dd-mmm-yy (e.g. "31-dec-13") • dd-mmm-yyyy (e.g. "31-dec-2013") Leave blank or enter NONE for no expiry date. For dd-mm-yy and dd-mmm-yy formats, where the year component may be ambiguous, the date is assumed to be in the past unless it results in a date that is over 80 years ago, in which case it will be assumed to be a date in the future.	None
ExpiryTimezone	Time zone code.	One or more characters that denote a time zone code (for example, *EST* for Eastern Standard Time in North America).	None

Additional Information

Import Token Account Data

About the Token Account Data Loader

Permissions

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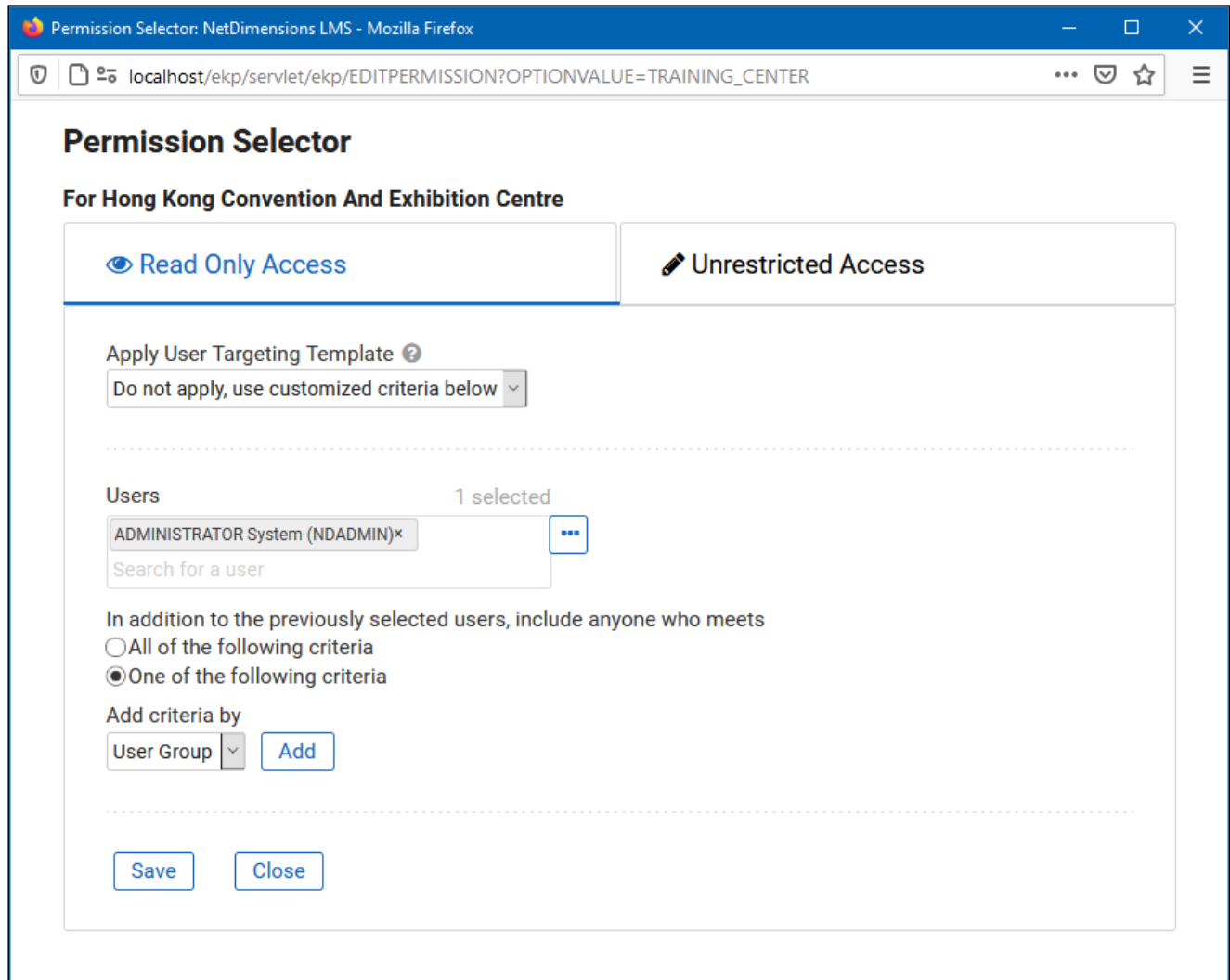

Figure: Permission Selector for Read Only Access to a Training Center

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

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.
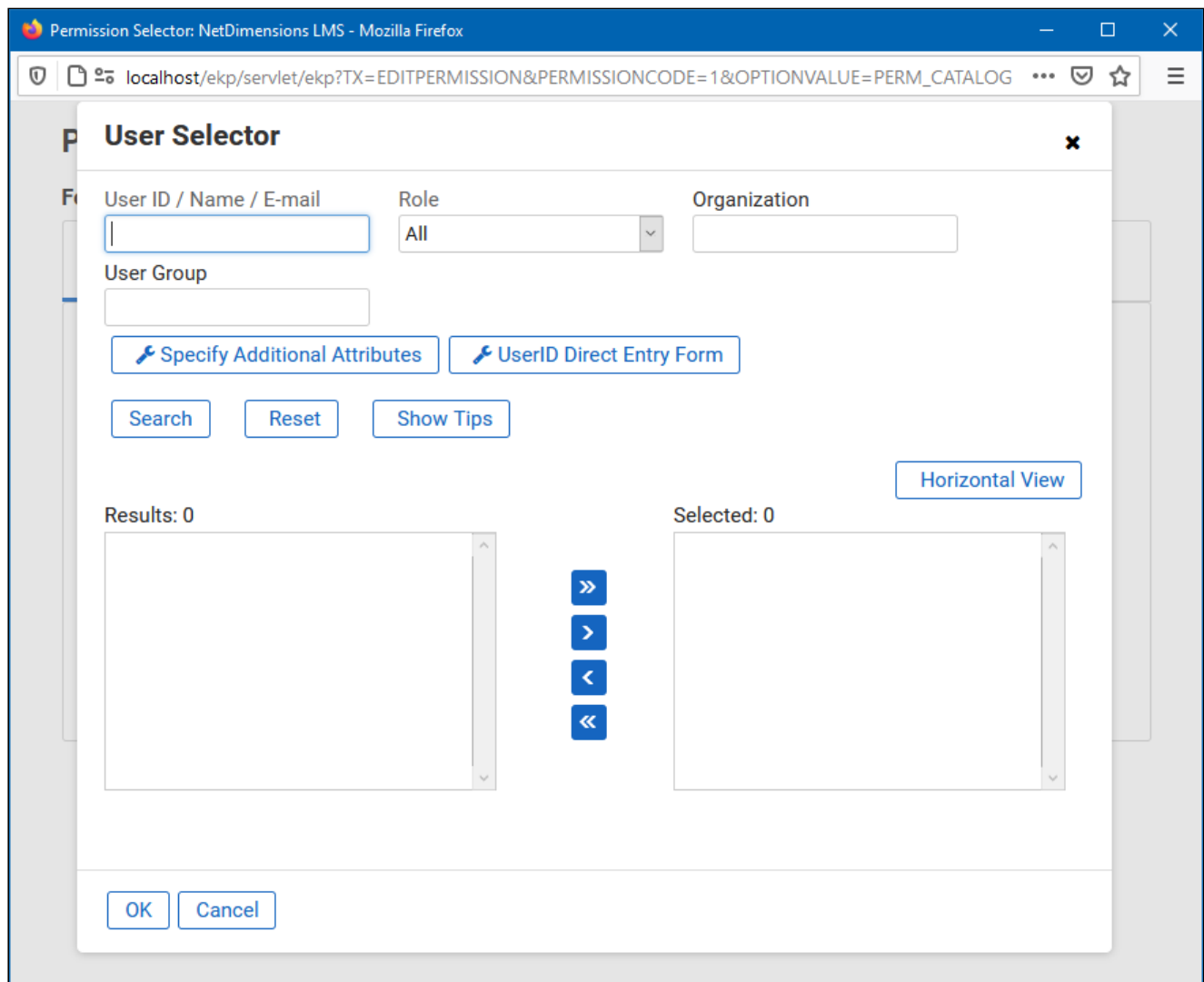

Figure: User Selector Accessed from the Permission Selector

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

About User Targeting Templates

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

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

- Permission Selector

- Appraisal Target Audience Selector

- Activate a System Language

- Create Token Package

- Terms of Use Manager

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

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

Set Access Permissions for a Template

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

Editing and Deleting Templates

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

User Targeting Template Support in Data Loaders

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

- Role Access Data Loader

- Question Data Loader

- Equivalency Rule Data Loader

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

Using a User Targeting Template as a Search Filter

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

Additional Information

Create a User Targeting Template

User Targeting Templates in Data Loaders

Permissions

Create a User Targeting Template

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

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

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

To create a user targeting template

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

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

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

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

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

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

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

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

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

Additional Information

About User Targeting Templates

User Selector

Permissions

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

About Language Bundles

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

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

Action Menu
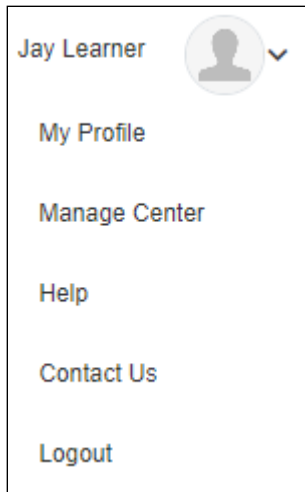

Action Menu Icon
*(legacy UI)*

Action Menu Icon
(Responsive UI)

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

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

Avatar Menu

Avatar Menu Icon
(legacy UI)
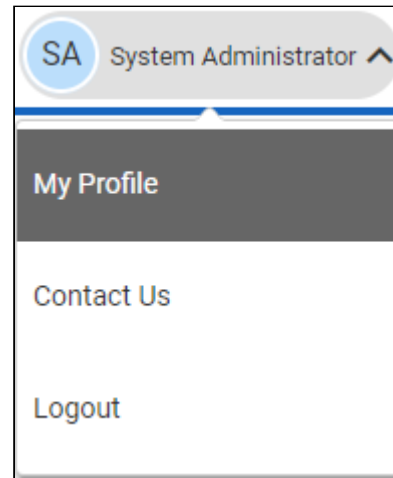
Avatar Menu Icon
(Responsive UI)

Figure: Comparison of Avatar Menus

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