peoplefluent

PeopleFluent Learning

Catalog Administration

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About Course Catalog Administration

Catalog administrators can use course catalogs to organize courses, grouping related content into catalogs and sub-catalogs. Learners can browse catalogs or search them to find courses. There are two types of catalog: those native to the LMS, and Web Catalogs for integration with third-party suppliers such as Skillsoft.

Like folders in a computer's file system, you can create a hierarchical structure of catalogs and sub-catalogs. For example, you could have a catalog for accountancy training with sub-catalogs to group courses for each level of diploma. Alternatively, you could set up a catalog structure to suit the type of enrollment allowed by courses, such as self-enrollable, those that require approval, and those that only allow supervisors to enroll other users.

To specify which users can see each catalog, you configure permissions for them. You can set permissions for each catalog individually, if required, or inherit permissions from their parent catalog. You can combine those two sets of permissions to determine who can see a specific sub-catalog. You can also allow users to access catalogs without logging in.

Learners can search for courses in catalogs or browse for courses using the Catalog Browser. You can configure how the Catalog Browser displays courses in each catalog independently.

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

To configure course catalogs, go to **Manage Center > Learning > Catalog List Maintenance**.

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Add a Catalog

Catalog administrators can add a catalog to the catalog hierarchy anywhere under the *Top* catalog. The catalogs that are direct children (sub-catalogs) of the *Top* are referred to as first-level catalogs and are—subject to their access permissions—displayed first when learners navigate to the Catalog Browser.

When you add a new catalog, you always add it as a child catalog of its parent catalog.

To add a catalog

1. Go to **Manage Center > Learning > Catalog List Maintenance**. The Catalog List Maintenance page opens, showing the *Top* and first-level catalogs.
2. Click the arrows to the left of the catalogs to show their child catalogs and navigate to the catalog you want to add a child catalog to.
3. Right-click the catalog you want to add a child catalog to and select **Add Catalog as Child** from the context menu. The Add Catalog as Child page opens, where you configure the new catalog.
4. Enter the catalog properties and click **Save**. The catalog is added to the hierarchy on the Catalog List Maintenance page.
5. Right-click on the new catalog and select **Edit Catalog Properties** from the context menu. The catalog details open in the Edit Catalog Properties page.
6. Click **Permissions** to configure access permissions for the catalog.
7. To inherit the access permissions from its parent catalog, select the **Additionally, grant permissions as defined in parent** check box. Permissions you configure for this catalog are applied in addition to any permissions configured for its parent catalog.
8. Click **Save**.

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Edit Catalog Properties

Catalog administrators can edit a catalog's properties to change the way it is presented to learners and to configure its access permissions.

To edit a catalog's properties

1. Go to **Manage Center > Learning > Catalog List Maintenance**. The Catalog List Maintenance page opens, showing the *Top* and first-level catalogs.
2. Click the arrows to the left of the catalogs to show their child catalogs and navigate to the catalog whose properties you want to edit.
3. Right-click the catalog you want to edit and select **Edit Catalog Properties** from the context menu. The catalog details open in the Edit Catalog Properties page.
4. Update the catalog properties as required and click **Save**.

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Catalog Properties

Use the table below to help you add a new catalog or edit its properties.

Table: Catalog Properties

Field	Description
Title	Enter the name of the Catalog. This is the name users see in the Catalog Browser, Catalog Search, and Home or Widget Page. This field is mandatory.
Reference Code	Enter an optional reference code. This appears in parenthesis after the title in the Catalog List Maintenance page. It is not visible to learners. You can use reference codes to help course administrators identify the correct courses to assign to catalogs when catalogs are available in multiple languages. With a reference code assigned to a catalog, administrators will be able to assign modules to all catalogs that have the same reference code without having to understand the title in different languages.
Comments	Enter optional comments about the catalog (for example, elaborate on the types of courses to include).
Language	If your PeopleFluent Learning supports multiple languages, and you want to display the catalog in the learners' preferred language, select **Multi-Language** from the drop-down list. To display the catalog only in a specific language, select it from the drop-down list.
Responsible Party	Enter the name of the person who controls or organizes the materials assigned to the catalog.

Catalog Display Format	Select the catalog display format from the drop-down list. This determines how catalogs are displayed in the Catalog Browser, and has more options for the legacy user interface (UI). There is a separate System Configuration setting for the catalog display format in the Catalog Search results.

For visually stimulating navigation in the legacy UI, PeopleFluent recommends using Format 3 for the top-level catalog, and Format 1 or 2 for individual catalogs.

See the table below for descriptions of the catalog display formats. |
| Picture | Click the **browse** icon to select the image to display when the Catalog Display Format includes a picture.

Alternatively, you can enter the path to the image as an absolute or relative URL.

In the Catalog Maintenance List page, you can assign random images to catalogs and courses that have no images assigned.

Images are displayed in different aspect ratios in the legacy user interface (UI) and new responsive UI. In the legacy UI, to see the whole image in the catalog, it must be no bigger than 150 x 150 pixels. In the new responsive UI, images are displayed in approximately a 16:9 width-to-height ratio. Any image size greater than 500 pixels wide can be used and will be scaled without distortion to fit. |
| Allow users to access the catalog without logging in | Select this check box to allow users to view the catalog without logging into the LMS. |
| Additionally, grant permissions as defined in parent | Select this check box to inherit the access permissions configured for the parent catalog. Any changes made to the parent catalog's permissions are automatically applied to this catalog. |

Table: Catalog Display Format—How catalog information is displayed in the legacy and responsive UIs

Format	Legacy UI	Responsive UI

Format 1	Catalog Picture, Course Picture	Title and Image
Format 2	Catalog Text, Course Picture	Title Only
Format 3	Catalog Picture, Course Text	Title and Image
Format 4	Catalog Text, Course Text	Title Only
Format (Dynamic)	Catalog Picture, Course Picture	Title and Image
Format 6	Catalog or Course Picture over Text	Title and Image
Format 7	Catalog Picture, Course Text with Vendor, Rating	Title and Image
Format 8	Catalog Picture, Course Picture with Title, Description, Language and Learning Type	Title and Image

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Disable Course Images in Catalogs

Assign Random Images to Catalogs

Configure Catalog Search Results Format

About Catalog Permissions

To help reduce the amount of permissions configuration required, catalog administrators can specify whether catalogs inherit permissions from their parent catalog. When you select the *Additionally, grant permissions as defined in parent* setting for a catalog it is visible to the same users as its parent catalog. Changing the parent settings automatically affects all of the children.

You can also set permissions for catalogs individually, which are enforced in addition to those inherited from a parent catalog. The inherited permissions and the explicit permissions added together determine who can see a specific catalog.

Even if inherited permissions are not used, anyone who can see a catalog is also granted read-only access to the direct parent catalogs up the hierarchy. Otherwise, a user could not navigate down to the sub-catalog they have explicit permission to use.

> PeopleFluent recommends always setting permissions on the first level catalogs. Sub-catalogs can then inherit permissions without any other permission setting required. Of course, if you want to limit access to specific sub-catalogs, you can set explicit permissions as needed and not inherit parent catalog permissions.

The permissions criteria for individual catalogs are normally interpreted using OR logic, although you may change this to AND in the Permissions Selector.

Example Permission Settings

For content organized for general browsing (using a structure meaningful to the users), select the **Additionally, grant permissions as defined in parent** check box for all sub-catalogs under the parent catalog.

For content organized by restricted groups, where some of the sub-catalogs are to be visible to only a specific group, clear the **Additionally, grant permissions as defined in parent** check box for those specific catalogs, and configure the required permissions for each.

Permissions work in the same way for catalogs that allow users to access them without logging in.

Draft Catalogs

Using permissions you can create catalogs hidden from learners, to use as staging areas for creating new catalogs or updating the course listings in existing catalogs, before releasing them for general viewing. When courses in a hidden catalog are ready to be published for learners, you can reassign them to the regular catalogs that learners can view.

Additional Information

Edit a Catalog's Permissions

Permissions

Edit Catalog Properties

Edit a Catalog's Permissions

Catalog administrators can edit a catalog's properties to change the way it is presented to learners and to configure its access permissions.

To edit a catalog's permissions

1. Go to **Manage Center > Learning > Catalog List Maintenance**. The Catalog List Maintenance page opens, showing the *Top* and first-level catalogs.
2. Click the arrows to the left of the catalogs to show their child catalogs and navigate to the catalog whose permissions you want to edit.
3. Right-click the catalog you want to edit and select **Edit Catalog Properties** from the context menu. The catalog details open in the Edit Catalog Properties page.

Additional Information

About Catalog Permissions

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Edit Catalog Properties

Configure Catalog Search Results Format

Catalog administrators can configure the catalog search results format for the legacy user interface (UI) only. When the new UI is enabled for users, the search results table includes the following columns:

- Course Title

- Course Type

- Description

Users can filter their Catalog Search results on:

- Course type (that is, classroom, online, task and so on)

- Vendor

- Category

- Subject

- Language

To configure the catalog search results format for the legacy UI

1. Go to **Manage Center > System > System Configuration** and select the Catalog category.

2. Select one of the following options from the *Search result format* setting:

   - Learning Module/Program Name, Learning Type, Catalog, and Brief Description
   - Learning Type, Learning Module/Program Name, Catalog, Price, Relevance, Vendor, and Rating
   - Module Image, Learning Module/Program Name, Learning Type, Catalog, Duration, and Brief Description
   - Learning Type, Module Name, Price, Vendor, Rating

3. Click **Save**

Assign Random Images to Catalogs

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

To assign library pictures randomly

1. Go to **Manage Center > Learning > Catalog List Maintenance**. The Catalog List Maintenance page opens, showing the *Top* and first-level catalogs.

2. Click **Assign Random Images**. You are asked to confirm this action. The number of items assigned an image is shown briefly at the top of the page.

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About Course Catalog Administration

Disable Course Images in Catalogs

By default, the Catalog Browser displays courses with their assigned image or a placeholder image. Catalog administrators can disable the images used for courses in all catalogs. This can be useful if your organization does not use images for some or all of its courses, and you do not want to use placeholder images.
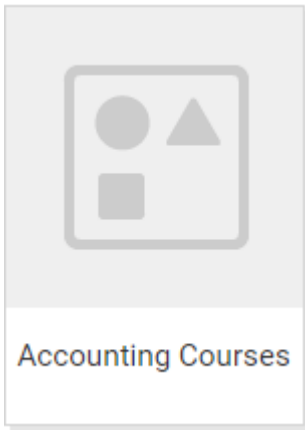

Figure: Catalog Placeholder Image

To disable all images for courses displayed in the Catalog Browser

1. Go to **Manage Center > System > System Configuration** and select the **Catalog** category.
2. Clear the check box for the **Show module images in catalog browser** option.
3. Click **Save**.

Additional Information

Catalog Properties

Clone a Catalog

Catalog administrators can clone a catalog to make an exact copy. You may wish to clone a catalog if you need to update its courses for a new year, for example. You can clone the current catalog, update its permissions so that only you can see it while updating the course sessions and schedules, and then allow learners to view it when the courses go live.

When you clone a catalog you select the target catalog to copy it to, just like copying a file or folder from one folder to another. You can also choose whether to include the course content and permissions. Alternatively, you can configure course content and permissions by editing the catalog properties and content any time after the clone has been saved.

To clone a catalog

1. Go to **Manage Center > Learning > Catalog List Maintenance**. The Catalog List Maintenance page opens, showing the *Top* and first-level catalogs.
2. Click the arrows to the left of the catalogs to show their child catalogs and navigate to the catalog you want to clone.
3. Right-click the catalog you want to clone and select **Clone** from the context menu. The Clone Catalog dialog opens.
4. Click the **browse** icon to select the parent catalog in which to place the new catalog.
5. Select or clear the check boxes to keep the catalog content and permissions, as required.
6. Select whether to select the check box to grant permissions as defined in the parent catalog.
7. Click **Save** to clone the catalog. The new catalog is added under the target parent catalog in the Catalog Structure list.

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Move a Catalog

Delete a Catalog

Delete a Catalog

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

To delete a catalog

1. Go to **Manage Center > Learning > Catalog List Maintenance**. The Catalog List Maintenance page opens, showing the *Top* and first-level catalogs.
2. Click the arrows to the left of the catalogs to show their child catalogs and navigate to the catalog you want to delete.
3. Right-click the catalog you want to delete and select **Delete** from the context menu.
4. Confirm the deletion.

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Move a Catalog

Catalog administrators can move catalogs from their parent catalog to another in the Catalog Structure on the Catalog List Maintenance page. This affects where catalogs are shown in the Catalog Browser. When you move a catalog you can also choose whether to keep the course content and permissions. Either way, you can configure those by editing the catalog properties and content any time after moving the catalog.

To move a catalog

1. Go to **Manage Center > Learning > Catalog List Maintenance**. The Catalog List Maintenance page opens, showing the *Top* and first-level catalogs.
2. Click the arrows to the left of the catalogs to show their child catalogs and navigate to the catalog you want to move.
3. Click and drag the catalog to the target parent catalog. The Move Catalog dialog opens.
4. Select or clear the check boxes to keep the catalog content and permissions, as required.
5. Select whether to select the check box to grant permissions as defined in the parent catalog.
6. Click **Save**. The catalog appears under its new parent catalog in the Catalog Structure.

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Edit Catalog Content

Catalog administrators can select courses to remove from a catalog when they are no longer needed.

To edit a catalog's content

1. Go to **Manage Center > Learning > Catalog List Maintenance**. The Catalog List Maintenance page opens, showing the *Top* and first-level catalogs.
2. Click the arrows to the left of the catalogs to show their child catalogs and navigate to the catalog whose contents you want to edit.
3. Right-click the catalog you want to edit and select **Edit Catalog Content** from the context menu. A new window opens and lists the courses in the catalog.
4. Select the check boxes of the courses you want to remove from the catalog.
5. Click **Save**. The course is removed from the catalog and the window closes.

Additional Information

About Course Catalog Administration

About the Catalog Assignment CSV Loader

Administrators can assign courses in the LMS to existing or new catalogs in bulk via the Catalog Assignment CSV Loader, or just create one or more catalogs without assigning courses to them. To assign courses to catalogs, you can enter one course ID and one catalog name per line in the CSV file, and set the Action to *Add*. You can also remove courses from catalogs by setting the Action to *Delete*.

Catalog Assignment CSV files have the following delimited fields:

- Action

- CourseID

- Catalog Name

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

To import catalog assignments, go to **Manage Center > Learning > Catalog Assigment CSV Loader**.

Assigning Courses to Existing Catalogs

You must specify the full hierarchy down to the sub-catalog level you want to assign the course to. Each level is separated by a forward slash (/). For example, WorldCorp/EMEA/Sales.

Creating New Catalogs with the Assignment Import

When you assign courses to catalog names that do not exist in the LMS, to create the new catalogs you must select the **Create any new catalogs found in the CSV file** check box when importing the file. Also you must specify the full hierarchy down to the sub-catalog level you want to create.

When you create new catalogs via Catalog Assignment CSV Loader, regardless of whether courses are assigned to them, they are set to inherit the access permissions from their parent catalog. However, if you create a new catalog at the second level, it does not automatically inherit permissions from the top-level catalog.

Removing Courses from Catalogs

When you remove courses from catalogs, you must enter the course IDs of the courses to remove (one per line).

Additional Information

Import Catalog Assignments

Import Catalog Assignments

Administrators can use the Catalog Assignment CSV Loader to:

- Assign courses in the LMS to existing or new catalogs

- Create new catalogs without assigning courses to them

- Remove courses from catalogs

To import catalog assignments

1. Go to **Manage Center > Learning > Catalog Assigment CSV Loader**. The Catalog Assignment CSV Loader opens and lists your previous organization 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 catalog assignment 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 catalog display format from the drop-down list. The selected format will be applied to each catalog specified in the CSV file.

8. If your CSV file contains new catalogs, select the **Create any new catalogs found in the CSV file** check box.

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.

11. If any records failed to import, you can go back to the Catalog Assignment CSV Loader page and click the **CSV Error Report** link for the failed import. The error report downloads to your desktop as a copy of the imported file that includes the error message.

Additional Information

About the Catalog Assignment CSV Loader

About Course Catalog Administration

About Language Bundles

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

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

About Web Catalogs

If your organization offers training courses provided by Skillsoft, catalog administrators need to import the learning content located on Skillsoft's servers into the LMS. Generally Skillsoft clients subscribe to thousands of courses, so it is not practical to import course data manually. Instead, Skillsoft uses a service framework called Open Learning Services Architecture (OLSA) to share the catalog and course information on their servers with the LMS. This integration of the LMS with Skillsoft, based on OLSA, is called Web Catalogs in the LMS.

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

You create and configure Web Catalogs to provide Skillsoft and LinkedIn Learning catalogs and courses to LMS users. Web Catalogs are synchronized with Skillsoft and LinkedIn to ensure they are up-to-date. You can also choose whether to include Skillsoft and LinkedIn content in Catalog Search results.

Like regular LMS catalogs, Web Catalogs have access permissions to specify who can view them and edit them.

Web Catalogs are available in the Learning and eLearning licenses only.

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

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Create a Skillsoft Web Catalog

Edit a Skillsoft Web Catalog

Create a LinkedIn Learning Web Catalog

Edit a LinkedIn Learning Web Catalog

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Create a Skillsoft Web Catalog

If your organization provides learning content from Skillsoft, catalog administrators can add a Web Catalog to enable LMS users to access it. Existing Web Catalogs are listed in the Web Catalogs page.

For each Web Catalog it shows:

- The endpoint (Skillsoft server)

- The date that the Skillsoft catalog was last updated

- The number of courses in the catalog

After adding a new Web Catalog, you must configure its access permissions so that learners can see it in the LMS.

To add a Web Catalog

1. Go to **Manage Center > Learning > Web Catalogs**. The Web Catalogs page opens.
2. Click **+ Add Skillsoft Web catalog**. The Add Web Catalog page opens.
3. Enter a name for the Web Catalog. This is the name learners see in the Catalog Browser and Catalog Search results.
4. Enter the Endpoint. This is the URL of the Skillsoft server providing the catalog information.
5. Enter your organization's Skillsoft Customer ID.
6. Enter the Shared Secret provided by Skillsoft for your organization's account.
7. Select the check box if you want to include additional Skillsoft course information in standard searches.
8. Select an option and then click the **Select catalog** link to choose the LMS catalog where you want newly downloaded courses to be saved after synchronization with Skillsoft.
9. Select an option from the drop-down list to specify how downloaded courses that already exist are assigned to catalogs in the LMS.
10. Click **Save**. The new Web Catalog is added to the Web Catalogs page.
11. Select **Permissions** from the new Web Catalog's action menu to configure its access permissions. The Permissions Selector opens in a new window.

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Edit a Skillsoft Web Catalog

When you edit a Skillsoft Web Catalog you can update for the following properties:

- The name learners see in the Catalog Browser and Catalog Search results

- The endpoint URL to its courses hosted by Skillsoft

- The synchronization options for new and updated courses

- The access permissions

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

To edit a Skillsoft Web Catalog

1. Go to **Manage Center > Learning > Web Catalogs**. The Web Catalogs page opens.
2. Click the name of the Web Catalog you want to edit. The Web Catalog Properties page opens.
3. Update the Web Catalog name and endpoint, if required.
4. Select the check box if you want to include various kinds of Skillsoft course information in standard searches.
5. Select an option and then click the **Select catalog** link to choose the LMS catalog where you want newly downloaded courses to be saved after synchronization with Skillsoft.
6. Select an option from the drop-down list to specify how downloaded courses that already exist are assigned to catalogs in the LMS.
7. Click **Save**.

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Create a LinkedIn Learning Web Catalog

If your organization provides learning content from LinkedIn Learning, catalog administrators can add a Web Catalog to enable LMS users to access it. Existing Web Catalogs are listed in the Web Catalogs page.

For each Web Catalog it shows:

- The LinkedIn Learning catalog name

- The date that the LinkedIn catalog was last updated

- The number of courses in the catalog

After adding a new Web Catalog, you must configure its access permissions so that learners can see it in the LMS.

To add a LinkedIn Learning Web Catalog

1. Go to **Manage Center > Learning > Web Catalogs**. The Web Catalogs page opens.
2. Click **+ Add LinkedIn Web catalog**. The Add Web Catalog page opens.
3. Enter a name for the Web Catalog. This is the name learners see in the Catalog Browser and Catalog Search results.
4. Enter the LinkedIn Client ID for your organization. This is provided by LinkedIn with the LinkedIn Learning license.
5. Enter the LinkedIn Content Connector Prefix.
6. Enter the LinkedIn Secret.
7. Click **Save**. The new Web Catalog is added to the Web Catalogs page.
8. Select **Permissions** from the new Web Catalog's action menu to configure its access permissions. The Permissions Selector opens in a new window.

Additional Information

About Web Catalogs

Edit a LinkedIn Learning Web Catalog

Edit a LinkedIn Learning Web Catalog

When you edit a LinkedIn Learning Web Catalog you can update for the following properties:

- The name learners see in the Catalog Browser and Catalog Search results

- The LinkedIn client ID for your organization

- The LinkedIn content connector prefix

- The LinkedIn secret

- The access permissions

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

To edit a LinkedIn Learning Web Catalog

1. Go to **Manage Center > Learning > Web Catalogs**. The Web Catalogs page opens.
2. Click the name of the Web Catalog you want to edit. The Web Catalog Properties page opens.
3. Update the catalog as required.
4. Click **Save**.

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Refresh a Web Catalog

Catalog administrators can refresh a Web Catalog to update it from Skillsoft. This keeps the Skillsoft courses registered in the LMS synchronized with the courses hosted by Skillsoft.

Web Catalogs are updated according to their synchronization settings, which you can view or update by editing the Web Catalog.

When the catalog update has completed, the date is updated in the Last Update column on the Web Catalogs list page.

To refresh a Web Catalog

1. Go to **Manage Center > Learning > Web Catalogs**. The Web Catalogs page opens.
2. Select **Refresh** from the action menu of the Web Catalog you want to refresh.

   Alternatively, click **Refresh All** to refresh all of the Web Catalogs.

Additional Information

Edit a Skillsoft Web Catalog

OLSA Catalog Synchronization Integration

About Web Catalogs

Delete a Web Catalog

When you delete a Web Catalog, you can choose whether to also delete all courses and training records associated with it. To delete web catalogs, your user role must have unrestricted access to the *Content Package, AICC Course Structure, Resource, Web Catalogs and PENS Import* feature in System Roles (Manage Features > Catalog Manager Features).

To delete a Web Catalog

1. Go to **Manage Center > Learning > Web Catalogs**. The Web Catalogs page opens.
2. Select **Delete** from the action menu of the Web Catalog you want to delete. The Confirm Web Catalog Delete dialog opens.
3. Select the check box if you also want to delete all courses and training records associated with the Web Catalog.
4. Click **OK** to delete the Web Catalog.

Additional Information

Edit a Skillsoft Web Catalog

Edit a LinkedIn Learning Web Catalog

About Web Catalogs

OLSA Catalog Synchronization Integration

Catalog administrators can specify how Web Catalogs in the LMS are synchronized with the Skillsoft library catalog structure when new courses are downloaded from Skillsoft. The options for assigning new courses downloaded to the LMS are:

- Assign the downloaded courses to the Skillsoft-defined catalog structure and locate it under a specific parent catalog in the LMS.

- Assign the downloaded courses to a specific parent catalog in the LMS, disregarding the catalog structure specified by Skillsoft.

The *Catalog synchronization handling for existing courses* options specify how course updates for existing Skillsoft courses are assigned to catalogs in the LMS.

There are two options:

- Preserve existing catalog assignments. Skillsoft courses downloaded with the same course ID as an existing course are assigned to the same catalog as before in the LMS.

- Add the catalog assignment defined above to existing assignments. Downloaded courses are assigned to LMS catalogs using the catalog assignment handling configured above for new courses, *in addition to any current catalog assignments*. In other words, this option preserves existing catalog assignments *and* assigns the downloaded courses to catalogs using the option specified for assigning new courses.

Additional Information

Refresh a Web Catalog

Edit a Skillsoft Web Catalog

About Web Catalogs

Skillsoft Resources in Search Results

The LMS Search can integrate with OLSA's *Assets Integration Service* to return Skillsoft resources categorized into Job Aids, Skill Briefs, Mentoring, Test Preparation, Books and Reference Resources.

The language used to perform the search is set according to the user's language setting in their User Preferences. If their preferred language is not available from the OLSA service, the default language *English* is used.

In addition to the learning types in the LMS, searches will also return external types from Skillsoft if so configured.

Additional Information

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Edit a Skillsoft Web Catalog

About Virtual Classroom Accounts

Administrators with unrestricted access to the *Catalog Manager* feature in System Roles (Manage Features > Catalog Manager Features) can configure an account to use virtual classroom based courses. The LMS supports the following generic types of account out-of-the-box (your implementation may support other vendors), to create a Launch URL for its session:

- GoTo Meeting

- WebEx Meeting

- Microsoft Teams

The LMS also integrates with the following virtual software to provide more advanced connections than a simple launch for the learner. These advanced connections include a learner launch, but may also provide the ability to synchronize with the virtual session to update the participant status from the session attendee roster:

- Adobe Connect

- WebEx (not the meeting account type)

- GoTo Training (not the meeting account type)

- Vitero

Each type of account requires different information to configure the LMS to access it.

Additional Information

Configure a Virtual Classroom Account

Configure a Virtual Classroom Account

Administrators with unrestricted access to the *Catalog Manager* feature in System Roles (Manage Features > Catalog Manager Features) can configure an account to use virtual classroom based courses.

To configure a virtual classroom account

1. Go to **Manage Center > Learning > Virtual Classroom Account Setup**. The Virtual Classroom Account Setup page lists the accounts that have been set up.

2. Click the name of an account to edit or Click **+ Create New**. The virtual classroom account settings page opens.

3. Select the **Virtual Classroom Type** from the drop-down list. The properties required for that type of account are shown.

4. Enter or select the settings for the Virtual Classroom Type you selected. They generally include account and authentication details, which are provided by the vendor.

5. Click **Save**. The virtual classroom account is added to the list in the Virtual Classroom Account Setup page.

6. Click the name of the account to edit it.

7. Click **Permissions** to set the read-only and unrestricted permissions for the account.

Additional Information

Permissions

LTI Tool Setup

Here, you can set up an LTI Tool so it can be launched as a course. For detailed information, please see the **LTI Integration Guide**.

LTI Tool Setup

Migrate Learning Object ID

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

> ⓘ The ID can only contain letters, digits, and the characters "-", "_", ".", "@" and "\". It must not contain spaces.

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

To configure system roles, go to **Manage Center > Users > System Roles**.

> ⓘ The screen provides the warning "As the number of records to be checked can be quite extensive, this function may take several minutes." Learning Object ID and Module ID are the same.

To migrate a Learning Object ID

1. Go to **Manage > Learning > Catalog General Settings > Migrate Learning Object ID**. The Migrate Learning Object ID page opens.
2. Enter the existing learning object ID.
3. Enter a new unique ID for the learning object, with no spaces or special characters.
4. Click **Execute**.

Additional Information

Migrate Learning Object ID Field Reference

Migrate Learning Object ID Field Reference

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

> ⓘ The ID can only contain letters, digits, and the characters "-", "_", ".", "@" and "\". It must not contain spaces.

To migrate Learning Object IDs, your user role must have unrestricted access to the **MigrateLearning Object ID** features in System Roles (Manage Features > Catalog Manager Features).

To configure system roles, go to **Manage Center > Users > System Roles**.

Field	Description
Existing Learning Object ID	The Learning Object ID of the learning object to migrate records from (maximum 85 characters).
New Learning Object ID	The Learning Object ID of the learning object to migrate records to (maximum 85 characters).

Additional Information

Migrate Learning Object ID

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

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

About Categories

Catalog administrators can use categories to group your courses to aid catalog administration. When you configure a learning module in the Catalog Editor you can assign a category to it in the Module Properties page. Administrators can filter the list of learning modules by category in the Learning Modules page, to help identify courses. Learners, however, cannot search the course catalog for courses by category.

After creating a new category, you will need to configure its permissions if you want other administrators to be able to use it to categorize courses in the Catalog Editor.

If you provide users with read-only permission, they can:

- See a category but not perform any action

- Use a category as search criteria in Learning Modules page

- Assign a category to a learning module in the Catalog Editor

If you provide users with unrestricted access, they can also:

- Update or delete the category

- Update the permissions assigned to it

Additional Information

Create a Category

Edit a Category

Permissions

Create a Category

Catalog administrators can use categories to group courses. After creating a new category, you will need to configure its permissions if you want other administrators to be able to use it to categorize courses in the Catalog Editor.

To create a category

1. Go to **Manage Center > Learning > Categories**. The Categories page opens.
2. Click **+ Create Category**. The Create Category dialog opens.
3. Enter a name for the new category and click **Save**. The category is added to the list in the Categories page.

Additional Information

About Categories

Edit a Category

Permissions

Edit a Category

Catalog administrators can use categories to group courses. When you edit a category, you can change only its name. The change of name is reflected in the Learning Modules page *Catalog* filter, and in the Catalog Editor for all learning modules it is assigned to.

To edit a category

1. Go to **Manage Center > Learning > Categories**. The Categories page opens.
2. Select **Edit Category** from the action menu of the category you want to edit. The Edit Category dialog opens.
3. Enter a new name for the category and click **Save**.

You can edit a category's permissions separately.

To edit a category's access permissions

1. Go to **Manage Center > Learning > Categories**. The Categories page opens.
2. Select **Permissions** from the action menu of the category you want to edit the permissions for. The Permissions Selector opens.

Additional Information

About Categories

Create a Category

Permissions

About Subjects

Catalog administrators can use subjects to group related course topics and to help learners search for courses about particular subjects. When you configure a learning module in the Catalog Editor you can assign a subject to it in the Module Properties page. Learners can filter Catalog Search results by subject, and course administrators can use subjects to filter the list of learning modules in the Learning Modules page for easier administration.

After creating a new subject, you will need to configure its permissions if you want other administrators to be able to use it to group related course topics in the Catalog Editor.

If you provide users with read-only permission, they can:

- Filter Catalog Search results by the subject

- Use a subject as search criteria in the Learning Modules page

- Assign a subject to a learning module in the Catalog Editor

If you provide users with unrestricted access, they can also:

- Update or delete the category

- Update the permissions assigned to it

Additional Information

Create a Subject

Edit a Subject

Permissions

Create a Subject

Catalog administrators can use subjects to group related course topics and to help learners search for courses about particular subjects. After creating a new subject, you will need to configure its permissions if you want other administrators to be able to use it to group related course topics in the Catalog Editor.

To create a category

1. Go to **Manage Center > Learning > Subjects**. The Subjects page opens.
2. Click **+ Create Subject**. The Create Subject dialog opens.
3. Enter a name for the new subject and click **Save**. The subject is added to the list in the Subjects page.

Additional Information

About Subjects

Edit a Subject

Permissions

Edit a Subject

Catalog administrators can use subjects to group related course topics. When you edit a subject, you can change only its name. The change of name is reflected in the Catalog Search results filters, in the Learning Modules page *Subject* filter, and in the Catalog Editor for all learning modules it is assigned to.

To edit a subject

1. Go to **Manage Center > Learning > Subjects**. The Subjects page opens.
2. Select **Edit Subject** from the action menu of the subject you want to edit. The Edit Subject dialog opens.
3. Enter a new name for the subject and click **Save**.

You can edit a subject's permissions separately.

To edit a subject's access permissions

1. Go to **Manage Center > Learning > Subjects**. The Subjects page opens.
2. Select **Permissions** from the action menu of the subject you want to edit the permissions for. The Permissions Selector opens.

Additional Information

About Subjects

Create a Subject

Permissions

About Geographic Regions

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

After creating a new geographic region, you will need to configure its permissions if you want learners to be able to use it to filter the legacy UI Course Calendar, and other administrators to be able to use it to categorize classroom sessions in the Catalog Editor.

If you provide users with read-only permission, they can:

- Filter the legacy UI Course Calendar by the geographic region

- Filter the list of sessions in the Session Administration tab (under the Teach menu)

- Assign it to a classroom session in the Catalog Editor and Course CSV loader

If you provide users with unrestricted access, they can also:

- Update or delete the geographic region

- Update the permissions assigned to it

Additional Information

Create a Geographic Region

Edit a Geographic Region

Permissions

Create a Geographic Region

Catalog administrators can use geographic regions to categorize classroom session locations. After creating a new geographic region, you will need to configure its permissions if you want learners to be able to use it to filter the legacy UI Course Calendar, and other administrators to be able to use it to categorize classroom sessions in the Catalog Editor.

To create a geographic region

1. Go to **Manage Center > Learning > Geographic Regions**. The Geographic Regions page opens, showing existing geographic regions.
2. Click **+ Create Geographic Region**. The Create Geographic Region dialog opens.
3. Enter a unique code for the region. This field is mandatory.
4. Enter a descriptive name for the region, to help learners and administrators identify it.
5. Click **Save**. The new geographic region is added to the list.
6. To edit a geographic region's permissions, go to **Manage Center > Learning > Geographic Regions**. The Geographic Regions page opens, showing existing geographic regions.
7. Select **Permissions** from the action menu of the geographic region you want to edit the permissions for. The Permissions Selector opens.

Additional Information

About Geographic Regions

Edit a Geographic Region

Permissions

Edit a Geographic Region

Catalog administrators can use geographic regions to categorize classroom session locations. When you edit a geographic region you can change its Code or Display Name. The Display Name is used in the Session Class Schedule page in the Catalog Editor, and in the filters for Session Administration and the legacy UI Course Calendar.

To edit a geographic region

1. Go to **Manage Center > Learning > Geographic Regions**. The Geographic Regions page opens, showing existing geographic regions.

2. Select **Edit Geographic Region** from the action menu of the geographic region you want to edit. The Edit Geographic Region dialog opens.

3. Update the Code and Display Name as required and click **Save**.

4. To edit a geographic region's permissions, go to **Manage Center > Learning > Geographic Regions**. The Geographic Regions page opens, showing existing geographic regions.

5. Select **Permissions** from the action menu of the geographic region you want to edit the permissions for. The Permissions Selector opens.

Additional Information

About Geographic Regions

Create a Geographic Region

Permissions

About Vendors

Catalog administrators can use vendors to identify the companies who produce the training courses available from the LMS. You select the course vendor in the Module Properties page when configuring learning modules in the Catalog Editor.

Course administrators can filter the list of learning modules by vendor in the Learning Modules page. Learners can filter Catalog Search results by vendor in the legacy (non-responsive) user interface.

Vendors do not have access permissions in the LMS, so all users can see all vendors. To create, edit and delete vendors, your user account must have a system role with unrestricted access to the *Catalog Configuration* feature in System Roles (Catalog Manager Features > Catalog Configuration).

Additional Information

Create a Vendor

Edit a Vendor

Create a Vendor

Catalog administrators can use vendors to identify the companies who produce the training courses available from the LMS.

To create a vendor

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

Additional Information

About Vendors

Edit a Vendor

Edit a Vendor

Catalog administrators can use vendors to identify the companies who produce the training courses available from the LMS. When you edit a vendor you can change its name, logo and specify whether you want to show the vendor in the Course Details page.

To edit a vendor

1. Go to **Manage Center > Learning > Vendors**. The Vendors page opens, showing existing vendors.

2. Select **Edit Vendor** from the action menu of the vendor you want to edit. The Edit Vendor dialog opens.

3. Update the name and logo as required.

4. Select the check box if you want to include the vendor's name and logo (if selected) on the Course Details page. Otherwise clear the check box.

5. Click **Save** to update the vendor.

Additional Information

About Vendors

Create a Vendor

About Module Attribute Categories

As a course administrator you can create your own custom module attributes to help you categorize and organize your learning modules. For example, you could create two module attributes, one to specify whether a course requires personal protective equipment (PPE), and another to specify what items of PPE are required.

Module attributes can be any of the following data types, which determine what type of values can be assigned to them:

- Free text (a single line of text up to 255 characters)

- Text area (multiple lines of text)

- Drop-down (select the value from a list)

- 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 can assign values to module attributes that you have read-only access permission for when you configure learning modules in the Catalog Editor.

When you configure a module attribute you can choose where in the LMS its value can be viewed (for example, in the Course Details page).

In addition to module attributes, you can also configure session attributes, which apply only to learning module sessions. Instructors can use session attributes to filter courses and sessions in the Teach menu pages.

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

To configure module attributes, go to **Manage Center > Learning > Module Attribute Categories**.

From the Module Attribute Categories page you can create, edit and delete module attributes, and configure their access permissions. You can include module attributes in reports built with the Report Wizard if you have at least read-only permission for them.

Additional Information

Create a Module Attribute

Edit a Module Attribute

Permissions

About Session Attribute Categories

Create a Module Attribute

Catalog administrators can create custom module attributes to help you categorize and organize learning modules. If you have read-only access permission for a module attribute, it is included in the Module Properties page in the Catalog Editor, where you can assign a value to it.

> ⓘ   When you create a new module attribute you have to save it before you can add any options for drop-down list items and configure its access permissions to enable other users to use it and edit it.

To create a module attribute

1. Go to **Manage Center > Learning > Module Attribute Categories**. The Module Attributes page opens, showing existing module attributes.
2. Click **+ Create New Module Attribute**. The Create Module Attribute page opens.
3. Enter a unique code for the attribute.
4. Enter a name of the attribute. For multi-language systems you can enter the label key that will be used to look up the localized name in the user's preferred language.
5. Select the type of data represented by the attribute.
6. For numeric attributes, select the check box if you want to show the sum of the values when printing or reporting the attribute.
7. Select the check boxes of the areas in the LMS where you want to use the attribute.
8. Click **Save**. The attribute is added to the list in the Module Attributes page.

Additional Information

About Module Attribute Categories

Attribute Option Values

Edit a Module Attribute

Permissions

Edit a Module Attribute

Catalog administrators can edit a module attribute to:

- Update its access permissions

- Change its code and display name

- Change the areas it can be used in the LMS

- Add, edit or remove the options available for drop-down list attributes

There are restrictions on changing the attribute's type. For more information, see Allowed Transitions Between Dynamic Attribute Types.

To edit a module attribute

1. Go to **Manage Center > Learning > Module Attribute Categories**. The Module Attributes page opens, showing existing module attributes.
2. To edit an attribute's permissions only, select **Permissions** from its action menu. The Permissions Selector opens in a new window.
3. To edit an attribute's properties and, optionally, its permissions, select **Edit** from its action menu. The Edit Module Attribute page opens.
4. Update the attribute's properties as required.
5. To add an option to a drop-down list attribute, click **Add New Option**. The Create Module Attribute Value page opens.
6. To edit or delete an option for a drop-down list attribute, click the name of the option. The Edit Module Attribute Value page opens where you can edit or delete it.
7. Optionally, click **Permissions** to edit the attribute's permissions.
8. Click **Save**.

Additional Information

About Module Attribute Categories

Attribute Option Values

Permissions

Attribute Option Values

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

Table: Attribute option fields

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

Additional Information

Create a Module Attribute

Create a Session Attribute

Create a Transcript Attribute

Allowed Transitions Between Dynamic Attribute Types

Table: Allowed transitions between dynamic attribute types

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

About Session Attribute Categories

As a course administrator you can create your own custom session attributes to help you categorize and organize classroom-based training sessions.

Session attributes can be any of the following data types, which determine what type of values can be assigned to them:

- Free text (a single line of text up to 255 characters)

- Text area (multiple lines of text)

- Drop-down (select the value from a list)

- 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 can assign values to session attributes that you have read-only access permission for when you configure learning module sessions in the Catalog Editor.

Instructors can use session attributes to filter courses and sessions in the Teach menu pages.

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

To configure session attributes, go to **Manage Center > Learning > Session Attribute Categories**.

From the Session Attribute Categories page you can create, edit and delete session attributes, and configure their access permissions.

Additional Information

Create a Session Attribute

Edit a Session Attribute

Permissions

About Module Attribute Categories

Create a Session Attribute

Catalog administrators can create custom session attributes to help categorize and organize classroom-based training sessions. If you have read-only access permission for a session attribute, it is included in the Edit Session Properties page in the Catalog Editor, where you can assign a value to it.

> ⓘ When you create a new session attribute you have to save it before you can add any options for drop-down list items and configure its access permissions to enable other users to use it and edit it.

To create a session attribute

1. Go to **Manage Center > Learning > Session Attribute Categories**. The Session Attributes page opens, showing existing session attributes.
2. Click **+ Create Session Attribute**. The Create Session Attribute page opens.
3. Enter a unique code for the attribute.
4. Enter a name of the attribute. For multi-language systems you can enter the label key that will be used to look up the localized name in the user's preferred language.
5. Select the type of data represented by the attribute.
6. For numeric attributes, select the check box if you want to show the sum of the values when printing or reporting the attribute.
7. Select the **Mandatory** check box if course administrators must enter or select a value for the attribute in the Catalog Editor > Edit Session Properties page.
8. Select the check boxes of the Teach menu areas in the LMS where you want to use the attribute. Select the **Teach** check box to include the attribute as a column in the list of sessions in Active Sessions and Session Administration. Select the **Teach Session Administration Filter** check box to include the attribute as a filter in Session Administration.
9. Click **Save**. The attribute is added to the list in the Session Attributes page.

Additional Information

About Session Attribute Categories

Attribute Option Values

Edit a Session Attribute

Permissions

Edit a Session Attribute

Catalog administrators can edit a session attribute to:

- Update its access permissions

- Change its code and display name

- Change the areas it can be used in the LMS

- Add, edit or remove the options available for drop-down list attributes

There are restrictions on changing the attribute's type. For more information, see Allowed Transitions Between Dynamic Attribute Types.

To edit a session attribute

1. Go to **Manage Center > Learning > Session Attribute Categories**. The Session Attributes page opens, showing existing session attributes.

2. To edit an attribute's permissions only, select **Permissions** from its action menu. The Permissions Selector opens in a new window.

3. To edit an attribute's properties and, optionally, its permissions, select **Edit** from its action menu. The Edit Session Attribute page opens.

4. Update the attribute's properties as required.

5. To add an option to a drop-down list attribute, click **Add New Option**. The Create Session Attribute Value page opens.

6. To edit or delete an option for a drop-down list attribute, click the name of the option. The Edit Session Attribute Value page opens where you can edit or delete it.

7. Optionally, click **Permissions** to edit the attribute's permissions.

8. Click **Save**.

Additional Information

About Session Attribute Categories

Attribute Option Values

Permissions

About Transcript Attribute Categories

As a course administrator you can create your own custom transcript attributes to include in learners' transcript details for courses they have enrolled in. You can assign values to transcript attributes in the Transcript Details page for learning modules and in the Group Enrollment page in the Catalog Editor. When learners are group enrolled in a course, the values assigned in the Group Enrollment page are saved to the learners' transcripts. The values can be changed in the Transcript Details page.

Transcript attributes can be any of the following data types, which determine what type of values can be assigned to them:

- Free text (a single line of text up to 255 characters)

- Text area (multiple lines of text)

- Drop-down (select the value from a list)

- 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 can assign values to transcript attributes that you have read-only permission for in the Transcript Details page for learning modules in the Records/Transcript tab.

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

To configure transcript attributes, go to **Manage Center > Learning > Transcript Attribute Categories**.

From the Transcript Attribute Categories page you can create, edit and delete transcript attributes, and configure their access permissions.

Additional Information

Create a Transcript Attribute

Edit a Transcript Attribute

Permissions

Create a Transcript Attribute

Catalog administrators can create custom transcript attributes to include in learners' transcript details for courses they have enrolled in. You can show transcript attributes in:

- Catalog Editor > Session Properties > Group Enroll

- Learning > Records/Transcript > Transcript Details

- Teach > Active Sessions > Review Participants

> ⓘ   When you create a new transcript attribute you have to save it before you can add any options for drop-down list items and configure its access permissions to enable other users to use it and edit it.

To create a transcript attribute

1. Go to **Manage Center > Learning > Transcript Attribute Categories**. The Transcript Attributes page opens, showing existing transcript attributes.
2. Click **+ Create Transcript Attribute**. The Create Transcript Attribute page opens.
3. Enter a unique code for the attribute.
4. Enter a name of the attribute. For multi-language systems you can enter the label key that will be used to look up the localized name in the user's preferred language.
5. Select the type of data represented by the attribute.
6. For numeric attributes, select the check box if you want to show the sum of the values when printing or reporting the attribute.
7. Select the check boxes of the areas in the LMS where you want to use the attribute.
8. Click **Save**. The attribute is added to the list in the Transcript Attributes page.

Additional Information

About Transcript Attribute Categories

Attribute Option Values

Edit a Transcript Attribute

Permissions

Edit a Transcript Attribute

Catalog administrators can edit a transcript attribute to:

- Update its access permissions

- Change its code and display name

- Change the areas it can be used in the LMS

- Add, edit or remove the options available for drop-down list attributes

There are restrictions on changing the attribute's type. For more information, see Allowed Transitions Between Dynamic Attribute Types.

To edit a transcript attribute

1. Go to **Manage Center > Learning > Transcript Attribute Categories**. The Transcript Attributes page opens, showing existing transcript attributes.
2. To edit an attribute's permissions only, select **Permissions** from its action menu. The Permissions Selector opens in a new window.
3. To edit an attribute's properties and, optionally, its permissions, select **Edit** from its action menu. The Edit Transcript Attribute page opens.
4. Update the attribute's properties as required.
5. To add an option to a drop-down list attribute, click **Add New Option**. The Create Transcript Attribute Value page opens.
6. To edit or delete an option for a drop-down list attribute, click the name of the option. The Edit Transcript Attribute Value page opens where you can edit or delete it.
7. Optionally, click **Permissions** to edit the attribute's permissions.
8. Click **Save**.

Additional Information

About Transcript Attribute Categories

Attribute Option Values

Permissions

About Transcript Status

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

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

- *Completed* could be sub-classified as *With Merit* or *With Distinction*

- *Waiver/Exempt* could be sub-classified as *Equivalent Qualification* or *Experience Waiver*

- *Excused* could be sub-classified as *Illness/Injury* or *Bereavement* or *Jury Service*

Instructors can set their learners' overall statuses to one of the default transcript statuses or sub-statues when they review session participants.

Direct appraisers and managers can apply transcript statuses to participants they enroll in courses using the Enrollment Wizard.

Course administrators can apply transcript statuses independently to individual participants in the session's Participants list in the Catalog Editor.

Appraisers, managers, instructors and administrators with access to the Report Wizard can include transcript statuses and sub-statuses in the Transcript Details section of their reports. The transcript status information can include:

- Overall Status

- Transcript Code

- Transcript Name

Transcript statuses have permissions that determine which users can use them in the LMS or edit their sub-statuses.

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

To create and edit transcript sub-statuses, go to **Manage Center > Learning > Transcript Status Manager**.

Additional Information

Add a Transcript Sub-status

Edit a Transcript Sub-status

Transcript Statuses

Transcript Statuses

The table below lists the default transcript statuses in the LMS. These cannot be edited, and new statuses cannot be added. Catalog administrators can add sub-statuses to the default transcript statuses to provide further differentiation between learners with a common status.

Table: Transcript Statuses

Status	Active	Creditable
Not Started	Yes	No
In Process	Yes	No
Waitlisted	No	No
Dropped from Waitlist	No	No
Withdrawn	No	No
Withdraw - Valid Reason	No	No
Withdraw - Invalid Reason	No	No
Withdrawn - Account Closed	No	No
Completed	No	Yes
Completed (Self-Asserted)	No	Yes
Cancelled	No	No
Pending Approval	Yes	No
Approval Denied	No	No
Passed	No	No
Failed	No	No
No show	No	No
Deactivated	No	No
Deadline Expired	No	No
Session Selection Needed	Yes	No

Waiver/Exempt	No	Yes
Excused	No	No

Completed (Self-Asserted)

Completed (Self-Asserted) is a distinguished form of completion, one that is self-asserted by the learner. Its status change can only be invoked by the learner (for example, when marking non-trackable content as complete, or by clicking the *Completed* button in the Knowledge Center before the trackable content is recognized as complete by the course ware). *Completed (Self-Asserted)* contributes to certificate and competency acquisition.

Deactivated

The *Deactivated* status is used for closing out an active enrollment. *Deactivated* is a terminal status but it will not contribute to certificate or competency acquisition.

On automatic program completion roll-up, if any elective sub-modules are incomplete or have been completed through equivalent learning, the learner's transcript is set to *Deactivated*.

When retiring a course session, changing the transcript status of enrolled users sets their transcripts to *Deactivated*.

Additional Information

About Transcript Status

Add a Transcript Sub-status

You can add sub-statuses to the default transcript statuses to provide further differentiation between learners with a common status.

Remember that sub-statuses inherit access permissions from their parent transaction status.

To create a sub-status

1. Go to **Manage Center > Learning > Transcript Status Manager**. The Transcript Status Manager opens with a list of the default statuses you have permission to view, and any sub-statuses.
2. Click the **+ Add Sub-status** link for the status you want to add sub-statuses to. The Create/Edit Entries page opens.
3. Enter a unique code for the sub-status.
4. Enter a name for the sub-status. This is the name provided in drop-down lists to select a transcript status, and is the name shown in learners' transcript details and reports.
5. Repeat steps 3 and 4 for additional sub-statuses as required.
6. Click **Save**. The sub-statuses are listed in the Sub-status column in the Transcript Status Manager.

Additional Information

Edit a Transcript Sub-status

About Transcript Status

Edit a Transcript Sub-status

Catalog administrators can edit transcript sub-statuses to update the code and display name, or to delete them.

To edit a transcript sub-status

1. Go to **Manage Center > Learning > Transcript Status Manager**. The Transcript Status Manager opens with a list of the default statuses you have permission to view, and any sub-statuses.
2. Select Edit Sub-statuses from a transcript status' action menu. The Create/Edit Entries page opens.
3. Update the code and name of each sub-status as required.
4. To delete a sub-status, click the **Remove** icon to the right of the Name column.
5. Click **Save**. The sub-statuses are updated in the Sub-status column in the Transcript Status Manager.

Additional Information

Add a Transcript Sub-status

About Transcript Status

About Email Templates

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

System Templates and User Templates

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

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

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

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

Email Recipients

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

- Users with specific system roles

- A specific LMS user

- External email addresses

Languages

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

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

Predefined Messages

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

Message Parameters

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

Message Format

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

Email Attachments

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

Permissions

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

Usage

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

- Enrollment Policy References

- System References

- Certification References

- Organization Level Welcome and New Password References

- Learning Program/Module References

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

Additional Information

Create an Email Template

Search for Email Templates

Edit an Email Template

Copy an Email Template

Add a Language to an Email Template

Reset the Default Email Template Language

Email Parameters

Permissions

Search for Email Templates

All available email templates are listed in the Templates tab in the Email Template Editor. They are grouped into two folders: System Default and User Templates, which you can expand and collapse individually. If your organization has a large number of email templates, administrators can search for templates relating to particular events by filtering a single list of templates in the main page of the Email Template Editor.

You can search for email templates using the following criteria:

- Name

- Subject

- User Targeting Template

> ⓘ You can enter partial words in the Name and Subject fields without adding an asterisk (*) wildcard. If you include the * wildcard in the Name field, the search term becomes case-sensitive.

When you specify a User Targeting Template the list to email templates is filtered to include only those templates whose permissions specify a user targeting template to control which users have read-only or unrestricted access to it.

To search for email templates

1. Go to **Manage Center > Communicate > Email Template Editor**. The Email Template Editor opens in a new window.
2. Click the **Search** icon on the toolbar. The Template Search page opens, listing all of the email templates in alphabetical order (by Name).
3. Enter the filter criteria and click **Filter**. The list of templates is filtered according to your filter criteria.
4. If required, click the **Name** and **Subject** column headings to sort the list. Click again to toggle between ascending and descending order.
5. Click the name of an email template to open it in the editor.

Additional Information

Edit an Email Template

Copy an Email Template

Add a Language to an Email Template

Create an Email Template

Administrators can create a new blank email template as an alternative to copying and editing an existing template. When you create a new email template it is added to the User Templates folder. To enable the template to be selected by other administrators to use, you must give them read-only access permission. To enable other administrators to edit the template, you must give them unrestricted access permission.

> ⓘ   You must save the email template before you can assign permissions or add more languages.

To create an email template

1. Go to **Manage Center > Communicate > Email Template Editor**. The Email Template Editor opens in a new window.

2. Click the **Create Template** icon on the toolbar. The Email Template Properties page opens for the new template.

3. Enter a name for the template. This is required field.

4. To select the LMS user account that sends emails using this template, in the Sender section click the **browse** icon. The User Selector opens. Replies to the email are sent to the sender. If you leave this field blank, the default sender is the System Administrator user.

5. In the Recipients section, select which users (by system role) will receive emails using this template. Click the **browse** icon to select a single specific user to include as a recipient. You can also enter one or more external email addresses.

6. To base your email on a predefined message, select a predefined message from the drop-down list in the Message section. The message appears in the message editor, where you can edit it as required.

7. Enter the email subject. This is a required field.

8. Enter the email message in the editor. You can format the text using the options on the editor's toolbar. To edit the text in HTML, click the **Source Code** icon.

9. To insert parameters in the email text, select them from the **Parameters** drop-down list and click **Append to Message**.

10. To attach a file from the repository, click the **Assign attachment** link in the Attachments section. The Repository Manager opens in a new window, where you can select the file to attach. To attach the file, select its check box and click **Select**. The Repository Manager closes and the file is listed in the Attachments box in the Email Template Editor.

You must also select the **Attach Learner's Prework and Standard References** check box for the file to be sent with the email.

11. Attach the facility and training center maps, if required.

12. Select a logical domain for the email template, if required. The logical domain determines some of the default settings to use when explicit values have not been specified. For example, the Default System Approver is defined per logical domain, and can be selected as a recipient for emails.

13. Click **Save**. After saving the template you can configure the access permissions for other administrators, and add languages.

Additional Information

About Email Templates

Email Parameters

Add a Language to an Email Template

Permissions

User Selector

Email Parameters

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

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

Example: the Default Enrollment Confirmation Email

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

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

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

Additional Information

About Email Templates

Create an Email Template

Edit an Email Template

Copy an Email Template

Copy an Email Template

Administrators can copy an existing template to create a version that inherits its properties (except permissions), which you can then edit while retaining the original. You should always copy a Default System template if you want to change it because whenever the LMS is upgraded to a new version the System Default templates are reset, so any changes made to them are lost. When you copy a template the new copy is saved as a User Template.

To copy an email template

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

Additional Information

Search for Email Templates

Edit an Email Template

Add a Language to an Email Template

Email Parameters

Permissions

Edit an Email Template

Administrators can edit an existing template to change its recipients, message content, and permissions, and to add or remove language versions.

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

To edit an Email Template

1. Go to **Manage Center > Communicate > Email Template Editor**. The Email Template Editor opens in a new window.
2. Select the email template from one of the folders in the Templates tab, or search for a template to edit.
3. If required, click **Create a copy** to duplicate the template you want to change.
4. If required, click **Add new language** at the top of the page to add a new language version of the email template.
5. Edit the template properties as required and click **Save** to save it as a new User Template.

Additional Information

Search for Email Templates

Copy an Email Template

Add a Language to an Email Template

Email Parameters

Permissions

Add a Language to an Email Template

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

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

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

To add a language to an email template

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

Additional Information

About Email Templates

Edit an Email Template

Email Parameters

Search for Email Templates

Reset the Default Email Template Language

Administrators can change the default language for email templates.

⚠	When you change the default email template language any previous changes made to the System Default email templates are lost.

To reset the default language for email templates

1. Go to **Manage Center > Communicate > Reset System Default Email Template Language**. The Reset System Default Email Template Language page opens.
2. Select the new default language from the drop-down list.
3. Click **Submit**.

Additional Information

About Email Templates

Permissions

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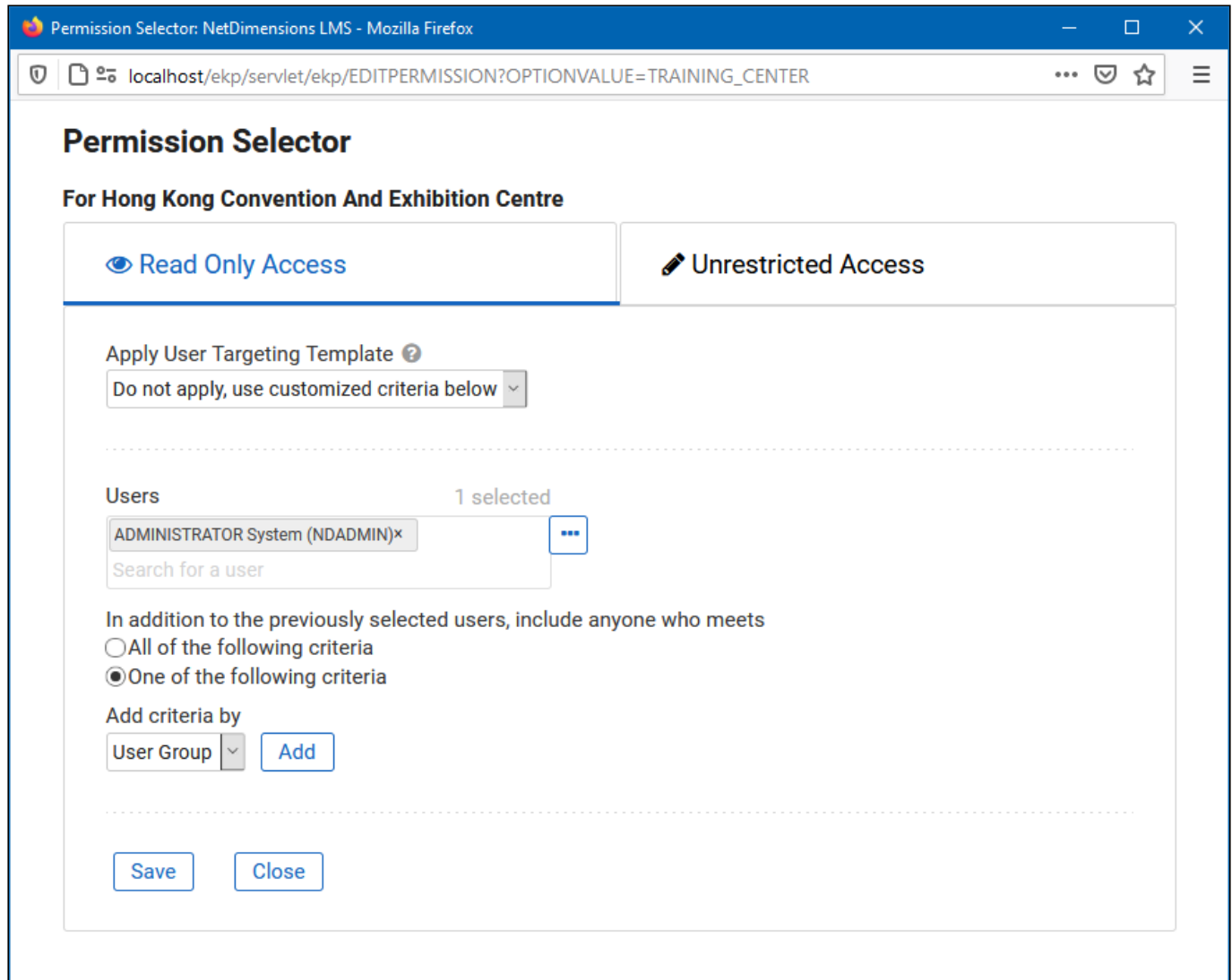

Figure: Permission Selector for Read Only Access to a Training Center

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.
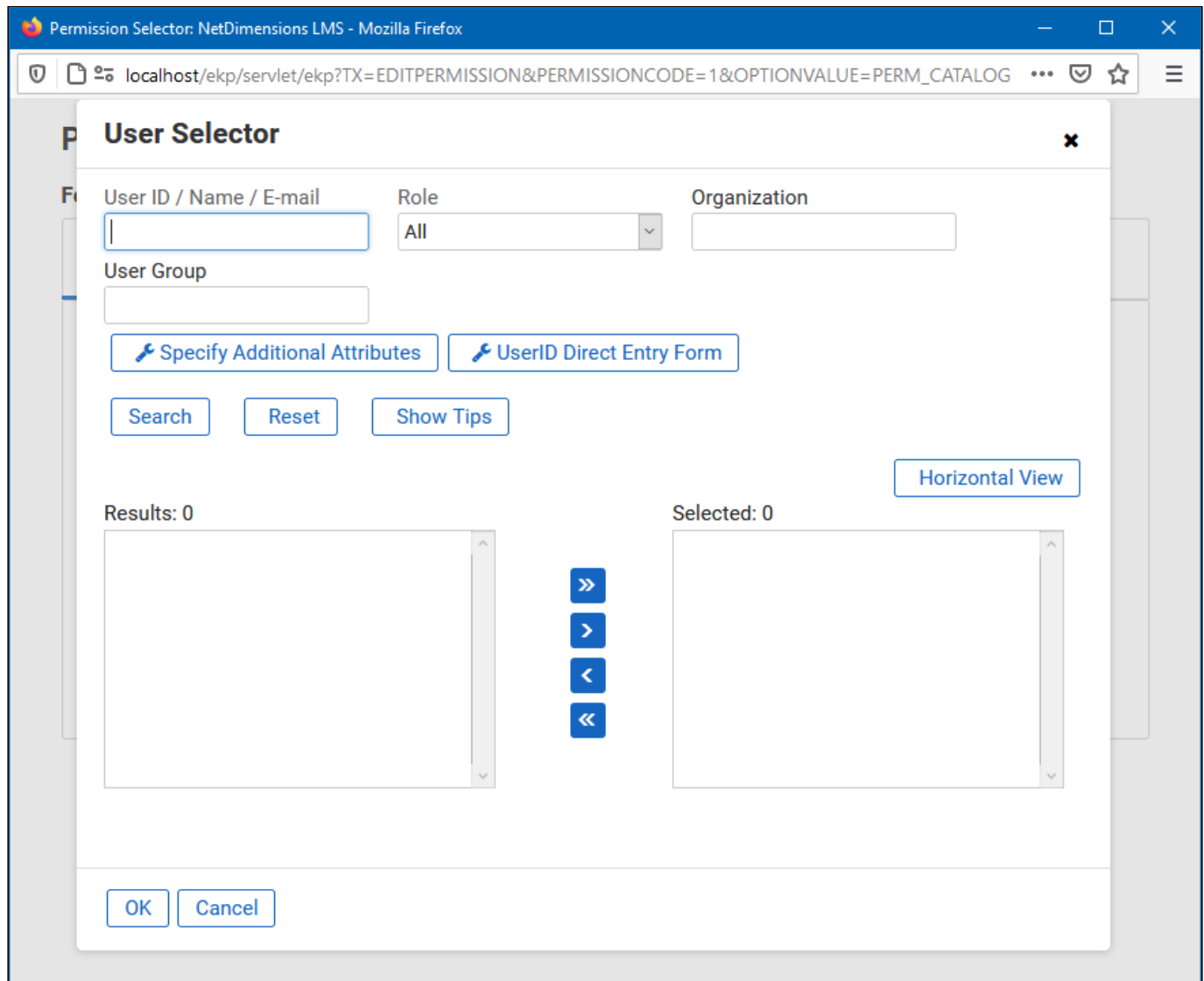

Figure: User Selector Accessed from the Permission Selector

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

Action Menu
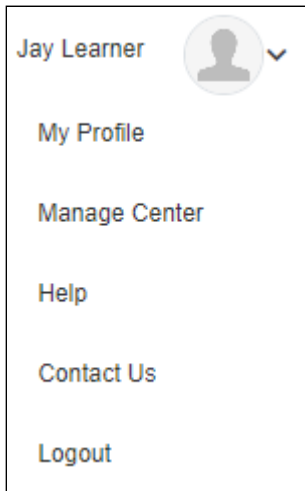

Action Menu Icon
*(legacy UI)*

Action Menu Icon
(Responsive UI)

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

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

Avatar Menu

Avatar Menu Icon
(legacy UI)
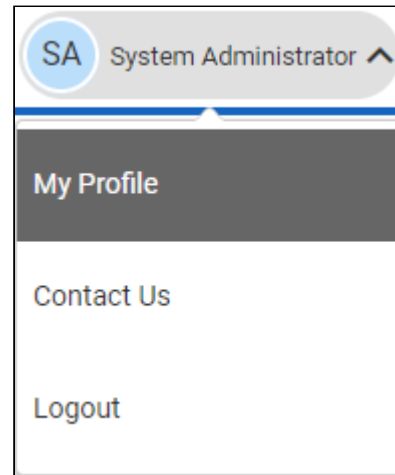
Avatar Menu Icon
(Responsive UI)

Figure: Comparison of Avatar Menus

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

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