PeopleFluent Learning

Team Review

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Contents

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Team Review Introduction

Team Review refers to a collection of features that allow reviews, approvals and assessments to be performed for an organization's learners.

Specifically, the team review features include:

- Approval options including tasks, enrollments, enrollment withdrawals, external training and certifications.
- Review options that include access to learner profiles, training information and competencies via the Review Page or the Career Development Center, with the ability to take action on specific items (such as enrolling a learner in a course or awarding a competency).
- Supervisor assessments for On-the-Job (OJT) training courses.
- Compliance Analytics that report an analysis of training records to identify the degree to which departments, groups. and individuals have completed one or more classes.

Reviewers can include learners' direct appraisers, managers or any specific LMS users with the appropriate user visibility and System Role feature permissions. The required permissions and assignments are included with each task/topic. If you have specific questions about your assignees or permissions, please contact your system administrator or the course administrator.

Task Approval

When a learner launches a task learning module, it can be marked as completed by one or more designated users specified in the task's sign-off options. You can also delegate task approval to another user.

> Task approval ability is based on your access to the Task Approval feature. Users with read-only access cannot approve task completion. Only users with unrestricted access can approve a task.

To review tasks for approval

1. Go to **Home > Workspace > Task Approval**.
2. Locate the appropriate task.
3. Click the action menu and select one of the following actions:
    - Approve Task
    - Delegate
    - Launch Course
    - Reference Resources

Enrollment Approval

Enrollment approval is required for courses with an enrollment policy that includes one or more approval steps. The policy's *Approver Selection Type* specifies who can approve or deny each step of the enrollment in the Enrollment Approval page. You can approve or deny an enrollment approval step only if you match the approver selection specified for an approval step.

> To approve or deny enrollments, you must have at least read-only access to the *Enrollment Approval* feature in System Roles (Review Features > Review Features).

Approve or Deny Enrollments

To approve or deny enrollments

1. Go to **Home > Workspace > Enrollment Approval**. The Enrollment Approval page opens with a list of your pending approvals. Enrollments for courses with an online payment display an *Add to cart* button.
2. Filter the list of approvals, if required. You can select the owner and status, period of the request date, the learners' organizations, and enter keywords related to the course. Click **Filter**.
3. Take one of the following actions:

    - Click the **Step Status** link to view the status for each approval step in the enrollment.
    - To deny an enrollment step, click **Deny**. The approval step is removed from the list.
    - To approve an enrollment step for a course with no charge, click **Approve**. The approval step is removed from the list.
    - To approve an enrollment step for a course with an online payment charge follow the steps below:

        a. Click **Add to cart**.
        b. To pay for an enrollment added to the cart, click **Proceed to shopping cart**. The Shopping Cart page opens with a list of course enrollments you have added to the cart.
        c. Click **Checkout**. The external online payment gateway configured for your LMS opens, where you can pay for the enrollments.

Delegate Enrollment Approval

You can delegate enrollment approval authority to other users for a specified period of time, giving them the ability to approve or deny approvals assigned to you. For example, you may want to delegate your approvals to another user when you are going on vacation.

To delegate enrollment approval, you must have at least read-only access to the *Enrollment Approval* feature in System Roles (Review Features > Review Features) can delegate enrollment approval.

To delegate enrollment approval

1. Go to **Home > Workspace > Enrollment Approval**. The Enrollment Approval page opens with a list of your pending approvals.
2. Click the **Click here to delegate approval authority to other users** link. The Delegation page opens with a list of users you have delegated approval authority to for the specified period.
3. Click **Add new entry**.
4. Enter or browse for the appropriate user.
5. Select the start and end dates for the period they can approve or deny enrollments on your behalf.
6. Click **Save**. The user is added to the list on the Delegation page.
7. Repeat steps 3 to 6 to add new delegates.

Withdrawal Approval

Learners can request withdrawal from approved enrollments, self-enrolled courses, and their pending enrollments. A course's withdrawal policy may include one or more approval steps. When a policy is in effect that contains approval steps, all steps must be approved before learners can be withdrawn from the course.

When this is the case, approvers are assigned for each approval step. In some cases, an approver may be assigned directly to a step. In other cases, an approver is assigned by an **Approver Selection Type**. For example, a step may require a learner's direct supervisor to be the approver. The user who is assigned as the learner's supervisor will automatically be the designated approver for that step.

Users designated as step approvers can go to the **Withdrawal Approval** page to perform approval actions and view course and user information. Here, you can do the following:

- Approve or deny withdrawals.
- View the course details.
- Open the Career Summary in the Career Development Center for each user.
- Print the list of approvals.

> In order to approve or deny withdrawals, you must have at least read-only access to the *Withdrawal Approval* feature in System Roles (Review Features > Review Features). Please contact your system administrator if you have questions about your specific permissions.

To approve or deny withdrawals

1. Go to **Home > Workspace > Withdrawal Approval**. The Withdrawal Approval page opens with a list of your pending approvals.
2. Filter the list of approvals, if required. You can select the owner and status, period of the request date, the learners' organizations, and enter keywords related to the course. Click **Filter**.
3. Take one of the following actions:
    - To deny a withdrawal, click **Deny**. The withdrawal approval is removed from the list and the learner is not withdrawn from the course.
    - To approve a withdrawal, click **Approve**. The withdrawal approval is removed from the list and the learner is withdrawn from the course.

External Training Approval

You can approve external training records for learners for whom you are their appraiser, and for learners in organizations that you supervise, if you are their organizational external training approver. If the corresponding external training record email template is configured and selected in System Configuration, it is sent to the learner when external training records are approved or denied.

- Administrators with unrestricted access to the *Ext. Training Approval* feature in System Roles (Review Features > Review Features) can approve and deny external training records in the External Training Approval page and Career Development Center.
- To approve external training for anyone in your organizational view, you also must have the *Is Organizational External Training Approver* role access control permission (in Data Access Control > Role General Permissions).
- Administrators with unrestricted access to the *External Training Records CSV Loader* feature in System Roles (Manage Features > Catalog Manager Features) can create, update and delete external training records via the External Training Records CSV Loader.

To approve or deny external training

1. Go to **Home > Workspace > External Training Approval**. The External Training Approval page opens with a list of external training approval requests.
2. Click the name of a participant. Their external training approval request opens.
3. Update the information in their external training record, if required.
4. Select one of the following options from the *Status* drop-down list:
   - To approve the external training, select **Approved**.
   - To deny the external training, select **Approval Denied**.
5. Click **Update** to save the changes or **Delete** to delete the external training record.

Self-Awarded Certification Approval

In the LMS, some Learners have the ability to create self-awarded certifications. A Learner's direct appraiser can approve, deny, cancel or delete these certifications.

Self-awarded certifications that have been approved are displayed and available in the same way that all other certification types are in the system.

You must have unrestricted access to the *Certification Approval* feature in System Roles (Review Features > Review Features) to approve, deny, cancel and delete self-awarded certifications pending approval.

To review pending certification approvals

1. Go to **Home > Workspace > Certification Approval**. The Certification Approval page opens with a list of your direct appraisees with pending approvals.
2. Click a participant's name. The Self-award Certification Approval page opens.
3. Select one of the following options from the Status drop-down list:
    - Approved
    - Approval Denied
    - Cancelled
4. To save the certification's new status, click **Update**. Alternatively, to delete the learner's certification entirely, click **Delete**.

Cancelled certifications are still shown in the **Certifications Review** page while deleted certifications are not.

Learner Reviews

As a direct appraiser, group reviewer and/or organization reviewer, you have the ability to review and take action on your assigned learners' training and career-related information.

The Review Page

Accessed from the Workspace menu, this page allows you to review Learner information such as course enrollments and job profile, competency and training statuses. Here, you can also assign learning modules and award competencies to Learners.

The Learner Review Page

The Career Development Center

The Career Development Center (CDC) provides a consolidated view of learners' employment, learning, compliance and career-related information. Where the Review page provides you with basic learner information and quick access to certain related tasks, the CDC provides comprehensive insight into a learner's employment profile, competencies and training. Most information and tasks available on the Review page are also available in the CDC, but the CDC contains additional information and more available actions.

The Career Development Center (CDC)

Review and Manage Learner Information in the CDC Learning Center

Review and Manage Learner Information in the CDC Career Center

The Learner Review Page

The Review Page provides basic learner information and quick access to some learner tasks. More comprehensive information, including the learner's profile, competencies and training is available in the Career Development Center. For additional information, please see The Career Development Center (CDC).

The Review Page allows you to review Learner information such as course enrollments and job profile, competency and training statuses. Here, you can also assign learning modules and award competencies to Learners.

Review Job Profile, Competency and Training Statuses

You can view learners' job profile, competency and training statuses in each of the tabs in the Review page.

Reviewers with read-only or unrestricted access to the *Review Menu* feature in System Roles (Review Features > Review Features) can access the Review page. To access the Organization review tab, reviewers must also have read-only or unrestricted access to the *Organization Review* feature.

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise
   - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learners.
3. Click on the learner's row. It expands to show the job profiles assigned to the learner.
4. Click a job profile name. It expands to show the required competencies, if any.
5. Click a competency name. It expands to show the optional and mandatory learning modules required to achieve the competency.

About the Statuses

The statuses are indicated by one of three icons:

- Complete indicator
- Incomplete indicator
- Grace period indicator

The grace period icon is shown if a learner is within a reminder period to retake a course before it expires.

The table below describes the meaning of each indicator for job profiles, competencies and learning modules.

	Complete indicator	Incomplete indicator	Grace period indicator
Job Profile	Indicates all the required competencies have been awarded.	Indicates all the required competencies have not been awarded.	If all the required competencies are awarded but one of the required competencies is in the grace period, the job profile will be indicated as being in the grace period.
Competency	Indicates all the required modules have been completed.	Indicates not all the required modules have been completed.	If all the required modules are completed but one of the required modules has a new revision released, the competency will be indicated as being in the grace period.
Learning Module	Indicates the learning module has been completed.	Indicates the learning module has not been completed.	If the new released revision of the learning module is not completed, the learning module will be indicated as being in the grace period.

Review Enrollments

On the Review Page, you can view learner enrollments and transcript details, send them emails and select sessions for them.

The following permissions are related to enrollment actions that can be taken from the Review Page:

- Reviewers with read-only or unrestricted access to the *Review Enrollment* feature in System Roles (Review Features > Review Features) can review enrollments.
- Reviewers with unrestricted access to the *Assign Module* feature in System Roles (Review Features > Review Submenu Features) can assign learning modules to learners.
- Reviewers with unrestricted access to the *Enroll Other Users* and *Enrollment Wizard* features in System Roles (Review Features > Review Features) can enroll multiple learners in a learning module.

To review enrollments

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise
   - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. Click the learner's action menu and select **Review Enrollments**.
4. Filter the list of enrollments, if required. Take one or more of the following actions:
   - To select a session for an enrollment, click **Session Selection Needed**. The Session Selection dialog opens where you can select a session.
   - To send an email to one or more learners in the list, select their check box and then select **Send Mail** from the Bulk Action drop-down list. An email form opens in a new window.
   - To view a learner's transcript for an enrollment, click their name in the list. The transcript opens in a new page.
   - To open the course details page for the selected enrollment, click the name of the course at the top of the transcript page. The course's Enrollment page opens for the learner.
   - To enroll the learner in the course, click **Assign to User**.
   - To enroll other learners via the Enrollment Wizard, click **Enroll Other Users**.

Review Enrollment Request History

You can review enrollment request history for selected learners.

Reviewers with read-only access to the *Review Enrollment Requests* feature in System Roles (Review Features > Review Submenu Features) can view a history of enrollment requests.

To view the enrollment requests history for learners

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise
   - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learners.
3. Click the check boxes of the learners whose enrollment requests you want to review.
4. Select **Enrollment Requests History** from the Bulk Action drop-down list. The Enrollment Requests History page opens with a list of enrollment requests for the selected users.
5. To filter the list of requests by a particular status, select a status from the Overall Status drop-down list. The list of requests is updated.

Assign a Learning Module to a Learner

The following permissions are related to assigning learning modules on the Review Page:

- Reviewers with unrestricted access to the *Assign Module* feature in System Roles (Review Features > Review Submenu Features) can assign learning modules to learners from the Review page.
- Reviewers with unrestricted access to the *Enroll Other Users* and *Enrollment Wizard* features in System Roles (Review Features > Review Features) can enroll multiple learners in a learning module by opening the Enrollment Wizard from the course details page. See step 6, below.

To assign a learning module to a learner in the Review page

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise
   - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. Click on the learner's action menu and select **Assign module**. T
4. Search for the learning module you want to assign to the learner.
5. Click **Details** for the learning module in the search results. The course details page opens.
6. Click **Assign to User**. The Enrollment Confirmation page opens, where you may need to enter additional enrollment information, such as a preferred date. Alternatively, click **Enroll Other Users** to open the Enrollment Wizard, where you can enroll multiple learners in the learning module.
7. Click **Confirm enrollment**. The learner is enrolled in the course.

Award a Competency to Learners

You can award competencies to a single learner or to multiple learners in bulk.

> Reviewers with unrestricted access to the *Competencies* feature in System Roles (Review Features > Review Submenu Features) can award competencies to learners in the Review page.

To award a competency to learners in the Review page

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise
   - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learners.

3. Take one of the following actions:

   - Click on a single learner's action menu and select **Assign competency**.
   - Select the check-boxes for multiple users and select **Assign competency** from the Bulk Action drop-down list.

3. The Award Competencies page opens with a list of all competencies from all competency models to which you have at least read-only access. Filter the list if necessary.
4. Click the **Select** icon to choose a competency to award.
5. The **Select Level** drop-down list is enabled. Click on the list.
6. The Select Level dialog opens. Select the proficiency level of the competency to award. The Select Level dialog will close.
7. Click **Save**. The competency is awarded to the learner.
8. Click **Back** to return to the Review page.

The Career Development Center (CDC)

About the Career Development Center

The Career Development Center (CDC) provides a consolidated view of a learner employment, compliance and career-related information. Reviewers with the appropriate feature access permissions and access to learners can do the following:

- Review and update employees profile information
- Review and edit information related to a learner's training
- Review and edit learners' job profiles, competencies and training gaps
- Upload and share files with learners

The CDC is available to reviewers (for example, managers, supervisors, human resource administrators) via the Review page. Learners can access the CDC via their profile page and through options in the Learning Center and Career Center menus.

Reviewers with read-only access to the *Review Submenu* features in System Roles (Review Features > Review Submenu Features) can view learners' training and career related information in the CDC. Unrestricted access to these features is required to update learners' records in the CDC.

Information in the CDC is grouped into three sections; *Employee Profile*, *Learning Center* and *Career Center*.

The Employee Profile

The Employee Profile contains general information about the learner. Available information includes employment, education and work history, resumé and other skills, contact details, a profile summary and other important data about the learner. The profile is divided into several sections that contain this information.

Depending on your System Role access permissions, you can view, edit and print to PDF learners' employee information in the Career Development Center (CDC).

- Reviewers with read-only access to the *Employment Information* and corresponding features in System Roles (Review Features > Review Submenu Features) can view those sections in the Employee Information page in the CDC.
- Reviewers with unrestricted access can edit the information in each section. In the Profile Summary section, reviewers can download the learner's vcard, upload the learner's picture and configure profile viewing constraints.

To review a learner's employee profile in the CDC

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise
   - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Employee Profile.** The CDC opens in a new window at the Employment Information page. Review the information. You can also take one of the following actions:
   - To add or edit information, click the corresponding **Add** and **Edit** links, or action menu.
   - To upload a resumé, click **Upload**.
   - To print the employee information to a PDF, click **Print to PDF**.
   - To view the course details for recent activity, click the name of the course.

The Learning Center

The Learning Center in the Career Development Center (CDC) comprises a number of pages in which you can view and edit information related to a learner's training. It includes a summary page that highlight's a learner's certifications, competencies, training plan and learning groups. From the summary, you can access competency training details, download certificates, view course details for learning modules in the learner's training group and view profiles of other users in the learner's learning group.

For more detailed information about information and actions available in the CDC Learning Center, please see Review and Manage Learner Information in the CDC Learning Center.

The Career Center

The Career Center contains information related to a learner's career training plus a list of their performance reviews. The Summary page contains a list of the learner's competencies along with the proficiency level for each. You can drill down to the Competencies page where you can view the competency's details, update its proficiency level and award new competencies.

For more detailed information about information and actions available in the CDC Career Center, please see Review and Manage Learner Information in the CDC Career Center.

Review and Manage Learner Information in the CDC Learning Center

The Learning Center in the Career Development Center (CDC) comprises a number of pages in which you can view and edit information related to a learner's training, plus a summary page highlighting their certifications, competencies, training plan and learning groups. On the Summary page you can:

- Open competency training details in the Career Center
- Download certificates for awarded certifications
- View the course details for learning modules in the learner's training plan
- View the personal profiles of people in the learner's learning group

The pages and information visible to you depend on your System Role access permissions. Reviewers with read-only access to the *Learning Center Summary* and corresponding features in System Roles (Review Features > Review Submenu Features) can view those sections in the Learning Center in the CDC.

Enrollments

You can review a learner's current course enrollments, learning records and external training records in the Learning Center. This information is presented in three tabs on the Learning page.

You may also be able to:

- Drill down to transcript details and course history pages
- Withdraw enrollments
- Transfer a learner's enrollment to another session
- Enroll the learner in additional courses
- Create external training records

> Reviewers with read-only access to the *Review Records/Transcript, Review Transcript History* and *Review External Training History* features in System Roles (Review Features > Review Submenu Features) can view the Records/Transcript tab, course launch history, and external training records in the CDC respectively. Unrestricted access is required to make changes.

To review a learner's enrollments in the Learning Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise
   - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Learning Center.**
4. Click **Learning**. The Learning page opens at the Enrolled Courses tab.
5. To filter the enrollments, enter the filter criteria and click **Filter**.
6. To view enrollment details, click the name of the enrollment. You can take the following actions:
   - To view or edit the learner's transcript for an enrollment, click the **Records/ Transcript** link under the enrollment.
   - To withdraw the learner's enrollment in a course, click **Withdraw**.
   - To transfer a learner's enrollment to another session, click **Session Transfer** and select a session from the dialog.

Enrollment Requests

You can review learner's enrollment requests, both current and previous, in the Enrollment Requests page in the Learning Center. You can filter the list of approvals by status, view details for the approval step, and open the enrollment details for the course, where you may also enroll other learners.

> Reviewers with read-only access to the *Review Enrollment Requests* feature in System Roles (Review Features > Review Submenu Features) can view enrollment requests in the CDC. Unrestricted access is required to open the enrollment details.

To review enrollment requests in the Learning Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise
   - **Organization View** - lists all learners who are visible to you across all organizations

2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Learning Center.**
4. Click **Enrollment Requests**.
5. To filter the list of enrollment requests by status, select a status from the Overall Status drop-down list. You can take the following actions:
    - To view the details of a approval request, click the final status. The Enrollment Status page opens in a new window.
    - To view the enrollment details for the course, click the name of the course. The enrollment details page opens in a new window.

Records/Transcripts

You can review a learner's learning records (also called transcripts) in the Learning Center. Depending on your System Role access permissions, you may also update the learner's transcripts, enroll other learners in a course, and view the course's transcript history.

> Reviewers with read-only access to the *Review Records/Transcript* and *Review Transcript History* features in System Roles (Review Features > Review Submenu Features) can view records/transcripts in the CDC. Unrestricted access is required to make changes to transcript data, such as the performance grade.
>
> Reviewers with the *Assign Module* feature in System Roles (Review Features > Review Submenu Features) can assign modules to the learner in the CDC.

To review records/transcripts in the Learning Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
    - **Direct Appraiser Review** - lists the learners who are your direct appraisees
    - **Assigned Group Review** - lists the learners who are members of users groups you supervise
    - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Learning Center.**
4. Click **Learning**. The Learning page opens at the Enrolled Courses tab.

5. Click **Records/Transcript**. The Records/Transcript tab lists the learner's courses. You can take the following actions:

    - To view or edit a transcript, click its name in the list. The transcript details open in a new window, where you can also view the transcript history, if enabled.
    - To print the transcript details for a course, select **Print Transcript** from the course's action menu.
    - To assign a course to the learner, click **+ Assign learning module**. A learning module search page opens where you can search for a course, view its details and assign it to the learner or enroll other users.
    - To print the list of courses, with their status, start and end dates, and score, click **Print**.

External Training Records

When you review learners' external training records in the Learning Center you can update the training details, and approve or deny external training records pending approval. You can edit external training records for learners for whom you are their appraiser or super-appraiser, and for learners in organizations that you supervise, if you are the organizational external training approver.

> Administrators with unrestricted access to the *Ext. Training Approval* feature in System Roles (Review Features > Review Features) can create, edit, delete, approve and deny external training in the CDC.
>
> To approve external training for anyone in your organizational view, you also must have the *Is Organizational External Training Approver* role access control permission (in Data Access Control > Role General Permissions).

To review an external training record in the Learning Center

1. Go to **Home > Workspace > Review**.
2. Locate the appropriate learner for review.
3. From the learner's action menu, select **Review Learning Center.**
4. Click **Learning**. The Learning page > Enrolled Courses tab opens.
5. Click **External Training Records**. The tab lists all of the learner's external training records.
6. Filter the list of external training records, if required.
7. Click the Learning Program/Module name of the external training record you want to edit.

8. Update the information in the external training record, if required. Please see External Training Records Field Reference for information about the external training reference fields
9. Select one of the following options from the *Status* drop-down list:
   - To approve the external training, select **Approved**. If the system is configured to do so, an email will be sent to the learner confirming the approval.
   - To deny the external training, select **Approval Denied**. If the system is configured to do so, an email will be sent to notify the learner that the external training has been denied.
   - To revert a previously approved or denied record for reconsideration, select **Pending Approval**.
11. Click **Update** to save the changes or **Delete** to delete the external training record.

Certifications

You can review learners' current, expired and pending certifications, and award certifications in the Learning Center. You can also delete learners' self-awarded certifications.

> You cannot approve or deny approval for certifications in the CDC, only in the Certifications Approval page.

> Reviewers with read-only access to the *Review Certifications* features in System Roles (Review Features > Review Submenu Features) can view learners' current, expired and pending certifications. Unrestricted access is required to award certifications and delete self-awarded certifications in the CDC.

To review and manage a learner's certifications in the Learning Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise
   - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Learning Center.**

4. Click **Certifications**. The Certifications page opens at the Certifications tab.
5. To filter the certifications list, select an option from the Status drop-down list.
6. You can take the following actions:

   - To award a certification

     a. Click **+ Award New Certification**. The Add Certification page opens.
     b. Click the **Certification** link to open the Select certification page, where you can select the certification to award the leaner.
     c. Select the certification and click **OK** to return to the Add Certification page.
     d. Update the Issue Date from today's date, if required.
     e. Add a comment, if required.
     f. Complete any certificate award attributes, as required.
     g. Click **Award Certification**. The certification is added to the list in the Certifications page.

   - To view the details of a certification, click the certification's action menu and select **Details**.
   - To delete an awarded certification, click the certification's action menu and select **Delete**. Click OK to confirm.
   - To print a PDF of the certification, click the certification's action menu and select **Print**.

Training Plans

You can review and edit learners' training plans in the Learning Center. A training plan consists of one or more courses suggested by the learner's manager or appraiser.

> Reviewers with read-only access to the *Training Plan* feature in System Roles (Review Features > Review Submenu Features) can view learners' training plans. Unrestricted access is required to edit the suggested courses in the plan or add new entries (course suggestions) to the plan.

To review and manage a learner's training plan in the Learning Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:

   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise

- **Organization View** - lists all learners who are visible to you across all organizations

2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Learning Center.**
4. Click **Training Plan**. The Training Plan page opens with a list of suggested courses in the plan (if any).
5. Select an option from a suggested course's action menu. You can edit the suggestion details or delete it from the training plan, subject to your system role permissions. You can take the following actions:

    - To view the course details for a suggested course, click the learning module/ program name. The course details open in a new window.

    - To add a new suggested course to the training plan, click **+ Create Entry**. The page refreshes with a blank course suggestion form. Saved suggestions are added to the end of the training plan list.

    a. Click **+ Create Entry**. The page refreshes with a blank course suggestion form.
    b. Click the **browse** icon to select a course to add to the list in the training plan. The Selector opens in a new window.
    c. Add a comment for the learner, if required.
    d. Select a priority (high, medium or low) from the list to indicate to the learner how important the course is compared to others in the list.
    e. Click the **calendar** icon to specify the date by which the learner should complete the course.
    f. Click **Save suggestions** to add the suggested course to the list.

Learning Paths

The Learning Path provides a graphical representation of a learner's training, assigned via their training plan or as part of their job profile. Each item is represented by a card and cards are arranged in a hierarchical structure to represent:

- Training plan > learning programs > courses

- Job profiles > competencies > learning programs > courses

Completed substitute courses that fulfill a training requirement are also shown.

> Reviewers with read-only access to the *Learning Path* feature in System Roles (Review Features > Review Submenu Features) can review learning paths in the Career Development Center (CDC).

To review a learner's learning path in the Learning Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
    - **Direct Appraiser Review** - lists the learners who are your direct appraisees
    - **Assigned Group Review** - lists the learners who are members of users groups you supervise
    - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Learning Center.**
4. Click **Learning Path**. The Learning Path page opens.
5. Click the **Summary** links on job profile and competencies cards to open a summary dialog.
6. Move the pointer over a course card and click the **Summary** link to open a summary dialog for the course.
7. Move the pointer over a course card and click the **Enroll and launch** link to enroll the learner in the course. You can also enroll learners from the summary dialog.

Progress Tracker

The Progress Tracker shows a learner's progress on a calendar using three statuses:

- Completed is shown for programs and courses (or their substitutes) that have been completed.
- Behind is shown if a program or course has a deadline that has passed.
- On Target is shown if a course or program is not completed or behind schedule.

> Reviewers with read-only access to the *Transcript History* feature in System Roles (Learner-Oriented Features > Learn Features) can review the Progress Tracker in the Career Development Center (CDC).

To review a learner's Progress Tracker in the Learning Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
    - **Direct Appraiser Review** - lists the learners who are your direct appraisees
    - **Assigned Group Review** - lists the learners who are members of users groups you supervise
    - **Organization View** - lists all learners who are visible to you across all organizations

2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Learning Center.**
4. Click **Progress Tracker**. The Progress Tracker page opens with a list of their programs and courses and shows the current month centered in the calendar. You can take the following actions:
   - To view more details about a program or course, click its name in the list.
   - To email the learner, click **E-mail**. The Send E-mail dialog opens.
   - To print the Progress Tracker, click **Print**.

Learning Groups

You can see the participants who are enrolled in the same programs and courses as the learner you are reviewing in the Career Development Center (CDC). You can hover the pointer over each participant to see their name in a pop-up tool tip, and click them to open their profile.

> Reviewers with read-only access to the *Learning Group* feature in System Roles (Review Features > Review Submenu Features) can view participants in the learning group.

To review learning groups in the Learning Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise
   - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Learning Center.**
4. Click **Learning Group**. The Learning Group page opens.
5. Hover the pointer over a **participant** icon to see their name.
6. Click a **participant** icon to open their profile.

Reports

You can run learning reports R213 (Individual Participant Report on Learning Programs) and R214 (Individual Participant Report on Learning Modules) for the learner you are reviewing in the Learning Center. You can run the reports immediately or schedule them to run at a specific time.

Reviewers with read-only access to the *Course Reports* feature in System Roles (Manage Features > Report Categories) can run learning reports in the CDC.

To run learning reports in the Learning Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise
   - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Learning Center.**
4. Click **Learning Reports**. The Learning Reports page opens.
5. Click one of the learning report links. The report opens in a new window.
6. Select the output format for the report.
7. Click the **Learning Module** link or box to select the course or program to report on. The selector opens in a new window.
8. Optionally, select the course or program's beginning and ending date to determine if its transcript is included in the report.
9. For learner's with multiple assignments, select the check box to include courses or programs from any of the learner's assignments.
10. Click one of the buttons to run or schedule the report.

Accounts

You can review the account records for the learner's enrollments in the Learning Center. The values do not necessarily represent the charges paid, but can simply indicate the value attached to each training session. Depending on your organization's set up, the information may be displayed in summary or detailed format. Summary displays a single record with the value total, where detailed displays multiple value records.

Reviewers with read-only access to the *Review Accounts* feature in System Roles (Review Features > Review Submenu Features) can review account information relating to each training session in the CDC. Reviewers with unrestricted access can also add account information for training sessions.

To review a learner's account records in the Learning Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
    - **Direct Appraiser Review** - lists the learners who are your direct appraisees
    - **Assigned Group Review** - lists the learners who are members of users groups you supervise
    - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Learning Center.**
4. Click **Accounts**. The Accounts page opens.
5. To add a new record, click **Add**. The page refreshes with a blank account record form.
6. Complete the account transaction information for the course and click **Add**. The new account record is added to the Accounts page.

SCORM Global Objectives

Some SCORM courses report global objectives. For those that do, you can view the course's objectives in the SCORM Global Objectives page in the Career Development Center (CDC) when reviewing a learner. The status of each objective is updated as the learner works through the course.

> Reviewers with read-only access to the *SCORM Global Objectives* feature in System Roles (Review Features > Review Submenu Features) can review SCORM global objectives in the CDC.

To review SCORM global objectives in the Learning Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
    - **Direct Appraiser Review** - lists the learners who are your direct appraisees
    - **Assigned Group Review** - lists the learners who are members of users groups you supervise
    - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Learning Center.**
4. Click **SCORM Global Objectives**. The SCORM Global Objectives page opens and shows the objectives that the learner has met while working through the course.

Review and Manage Learner Information in the CDC Career Center

The Career Center section of the Career Development Center contains information related to a learner's career training plus a list of their performance reviews. The topic addresses specific information you can view and tasks you can perform in the Career Center.

Job Profile

You can view a learner's job profiles in the Career Center on the Job Profiles page. Here, you can drill down to job profile details.

> Reviewers with read-only access to the *Job Profiles* feature in System Roles (Review Features > Review Submenu Features) can review learners' job profiles in the CDC. Reviewers with unrestricted access can also assign and de-assign job profiles.

To review job profiles in the Career Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise
   - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Career Center.**
4. Click **Job Profiles**. The Job Profile page opens with a list of the job profiles assigned to the learner. You can then take one or more of the following actions:
   - To see job profile's details and competencies, click the job profile name. The job profile's details open with a list of its competencies.
   - To assign a job profile to the learner, click **Assign job profile**.
   - To de-assign a job profile from a learner, click the job profile name to open its details page and then click **De-Assign Job Profile**.

Competencies

You can review, award and update competencies in the Career Center.

Reviewers with read-only access to the *Competencies* feature in System Roles (Review Features > Review Submenu Features) can review learners' competencies in the CDC. Reviewers with unrestricted access can also update competencies' proficiency levels and award new competencies.

To review competencies in the Career Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
   - **Direct Appraiser Review** - lists the learners who are your direct appraisees
   - **Assigned Group Review** - lists the learners who are members of users groups you supervise
   - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Career Center.**
4. Click **Competencies**. The Competencies page opens with a list of the competencies awarded to the learner. This page shows a list of summary information about the competencies awarded to the user.
5. Click on a competency name in the list and a detail page opens. Listed here are the competency details, the learner's proficiency level, the acquisition method, the proficiency level scale and related learning modules.
6. To view additional details, click the competency name in the list and a detail page opens. Listed here are the competency details, the learner's proficiency level, the competency scale and the acquisition method.
7. Take one or more of the following actions as necessary.
   - Update a competency proficiency level:
     a. Click **Update proficiency level**.
     b. Click the level in the Level Code drop-down list. The Select a Level dialog opens where you can select the new proficiency level.
     c. Click **Save** and then **Back** to return to the Competencies page.
   - Award a competency to the learner:
     a. Click **+Award Competency**. All competencies from all competency models are listed.

b. Select a competency model from the drop-down list to filter the list of competencies if there are too many.
c. Select the proficiency level from the Select Level column for the competency you want to award. The Select a Level dialog opens.
d. Select a level to close the dialog.
e. Click **Save**.
f. Click **Back** to return to the Competencies page.

Training Gap Analysis

The Training Gap Analysis page in the Career Center lists the courses that learners have not completed or been enrolled in, but are required based on their assigned job profiles. The missing courses identify the gap between the learner's training requirements and completed training.

> Reviewers with read-only access to the *Training Gap Analysis* feature in System Roles (Review Features > Review Submenu Features) can review learners' training gaps in the CDC. You must have read-only access to the catalogs containing the courses in the list to see more details in the course catalog. To assign a course in the list to the learner, you must have unrestricted access to the *Assign Module* feature in System Roles (Review Features > Review Submenu Features).

To review training gap analysis in the Career Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:
    - **Direct Appraiser Review** - lists the learners who are your direct appraisees
    - **Assigned Group Review** - lists the learners who are members of users groups you supervise
    - **Organization View** - lists all learners who are visible to you across all organizations
2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Career Center.**
4. Click **Training Gap Analysis**. The Training Gap Analysis page opens with a list of the courses not in the learner's transcript history for the selected job profile.

5. Take one of the following actions.

    - To see the courses required for a specific job profile assigned to the learner, select the job profile from the Job Profile drop-down list.
    - To see the course details page for a course, click the course name. The course details page opens.
    - To assign a course to the learner, click **Assign to User**. The Enrollment Confirmation page opens, where you may need to enter additional enrollment information, such as a preferred date. Click Confirm enrollment and the learner is enrolled in the course.

File Sharing

You can upload files to share with learners you supervise in the Career Development Center (CDC). Learners can download the files. Subject to their System Role access permissions, learners may also upload files in their career center to share with you. Files can be deleted only by the person that uploaded them.

> Reviewers with read-only access to the *Review My Files* feature in System Roles (Review Features > Review Submenu Features) can review and download files in the CDC. Unrestricted access is required to upload files to share with learners.

To share files in the Career Center

1. Go to **Home > Workspace > Review**. Learners are categorized into three tabs:

    - **Direct Appraiser Review** - lists the learners who are your direct appraisees
    - **Assigned Group Review** - lists the learners who are members of users groups you supervise
    - **Organization View** - lists all learners who are visible to you across all organizations

2. Select the appropriate tab to locate the learner.
3. From the learner's action menu, select **Review Career Center.**
4. Click **My Files**. The My Files page opens with a list of files that both you and the learner have uploaded to share with each other.
5. To upload a file to share, click **Upload**.
6. To download a file, click its name in the list.

The Enrollment Wizard

In the Enrollment Wizard, you can:

- Enroll learners in one or more courses
- Update learners' enrollment status
- Extend course deadline.
- Backdate Course Enrollment

Enroll Learners in the Enrollment Wizard

Reviewers with unrestricted access to the *Enrollment Wizard* feature in System Roles (Review Features > Review Features) can enroll learners in one or more courses in the Enrollment Wizard.

When enrolling learners, you can select a specific course completion date that takes precedence over any settings in the Catalog Editor, including for those module due dates that have already expired, will be expired, or have no due date. You can also specify the date from which participants can start the course.

To enroll learners via the Enrollment Wizard

1. Go to **Home > Workspace > Enrollment Wizard**.
2. Select **Enroll** from the Action drop-down list.
3. Click the Module(s) **+** icon to open the learning Module(s) selector page.
4. Select one or more courses and click **OK**.
5. Click the Participant(s) **+** icon to open the learning Participant(s) selector page.
6. Select one or more participants and click **OK**.
7. If you do not want enrollment confirmation emails to be sent, select the **Suppress automatic e-mails** check box.
8. To bypass enrollment restrictions and checks for valid enrollment during the group enrollment, select the **Override?** check box.
9. To run prerequisite checks configured for the learning module on the selected learners before enrolling them, select the **Perform prerequisite checks?** check box. Learners who fail to meet the prerequisites are not enrolled.
10. Optionally, enter the charged cost center, course completion deadline and restricted start date.

11. Click **Enroll**. The page refreshes with a summary report which shows the number of successful and failed enrollments.
12. Click **Back to Enrollment Wizard**. A record of the enrollment attempt is added to the top of the History list.
13. Click the links to download the enrollment processing log file and CSV error report to see more details about the enrollment processing and any reasons for failure respectively.

Update Enrollment Status in the Enrollment Wizard

> Reviewers with unrestricted access to the *Enrollment Wizard* and *Change Enrollment Status* features in System Roles (Review Features > Review Features) can update learners' enrollment status and extend their course deadlines in the Enrollment Wizard.

To update learners' enrollment status via the Enrollment Wizard

1. Go to **Home > Workspace > Enrollment Wizard**.
2. Select **Change Enrollment Status** from the Action drop-down list.
3. Click the Module(s) **+** icon to open the learning Module(s) selector page.
4. Select one or more courses and click **OK**.
5. Click the Participant(s) **+** icon to open the learning Participant(s) selector page.
6. Select one or more participants and click **OK**.
7. Select **Change overall status** from the Change enrollment procedure drop-down list.
8. If you do not want emails relating to the new status to be sent automatically, select the **Suppress automatic e-mails** check box.
9. Select the new status for the selected users and courses from the Target Status drop-down list.
10. Click **Change Enrollment Status**. The page refreshes with a summary report which shows the number of successful and failed status changes.
11. Click **Back to Enrollment Wizard**. A record of the status update attempt is added to the top of the History list.
12. Click the links to download the status change processing log file and CSV error report to see more details about the status change and any reasons for failure respectively.

Extend Course Deadlines

> Extending the deadline of a learning program also extends the deadlines of its component courses.

1. Go to **Home > Workspace > Enrollment Wizard**.
2. Select **Change Enrollment Status** from the Action drop-down list.
3. Click the Module(s) **+** icon to open the learning Module(s) selector page.
4. Select one or more courses and click **OK**.
5. Click the Participant(s) **+** icon to open the learning Participant(s) selector page.
6. Select one or more participants and click **OK**.
7. Select **Extend module deadline** from the Change enrollment procedure drop-down list.
8. Enter the number of days extension.
9. Click **Change Enrollment Status**. The page refreshes with a summary report which shows the number of successful and failed status changes.

Allowed Transitions between Enrollment Statuses

The table below lists the enrollment statuses you can change a learner to depending on their current status.

Current Status	Allowed target statuses
Not Started	Completed, Failed, Deactivated, In Process, No show, Waiver/Exempt, Withdrawn, Withdraw - Invalid Reason, Withdraw - Valid Reason
In Process	Completed, Excused, Failed, Deactivated, No show, Waiver/Exempt, Withdrawn, Withdraw - Invalid Reason, Withdraw - Valid Reason
Completed	Failed, Deactivated, In Process, Waiver/Exempt
Withdrawn	Withdraw - Invalid Reason, Withdraw - Valid Reason
Failed	Completed, In Process, Waiver/Exempt
No show	Completed, Failed, In Process, Waiver/Exempt
Waiver/Exempt	Completed, Failed, Deactivated, In Process
Withdraw - Valid Reason	Withdraw - Invalid Reason
Withdraw - Invalid Reason	Withdraw - Valid Reason
Excused	N/A
Dropped from Waitlist	N/A

Deactivated	Completed, Failed, In Process, No show, Waiver/Exempt

Backdate Course Enrollment

PFL allows you to add and backdate course enrollment via the Enrollment Wizard. Often, customers will conduct in-person, supervised training prior to adding a Task or On-the-Job course in PF Learning. When this is the case, administrators have to enroll users and mark them complete after the fact. Although backdating training records can be handled by importing training records via the Training Records CSV Loader, this often causes issues due to volume of data. The Enrollment Wizard helps to streamline this process.

There is a two-step process for backdating course enrollment. First, you will enroll the learners, backdating the enrollment date. Second, you will change the status, backdating the completion date. The process is divided into two steps to allow you the flexibility to backdate course completion if you have enrolled the users by other means, such as the data loader.

To enroll users with a backdated enrollment date

1. Go to **Home > Workspace > Enrollment Wizard**.
2. Select **Enroll** from the Action drop-down list.
3. Proceed with enrollment as usual and enter a date in the **Enrollment Date** field (available only when the Backdate feature is enabled). This date can be set to a past date/time.

To change the enrollment status to "Complete" and set the completion date.

1. Go to **Home > Workspace > Enrollment Wizard**.
2. Select **Change Enrollment Status** from the Action drop-down list.
3. In the **Change enrollment procedure** field, select **Change overall status**.
4. In the **Target Status** field, select **Completed**.
5. In the **Completion Date** field (available only when the Backdate feature is enabled) enter a date. This date can be set to a past date/time.

Supervisor Assessments for On-the-Job Training

About Supervisor Assessments

You can assess learners' on-the-job training (OJT) using supervisor assessments. When OJT learning modules are configured in the Catalog Editor, they can be assigned a supervisor assessments and one or more supervisors who can do the assessment. After learners complete the OJT course, an assigned supervisor completes the assessment, which then completes the course for the learner.

Launch a Supervisor Assessment

You can view and launch pending supervisor assessments for OJT courses for which you have been specified as a supervisor. The Supervisor Assessments page lists the OJT course participants awaiting supervisor assessment. You can also view participants' profiles in the Career Development Center (subject to your role's access permissions) and view the OJT course details page.

Reviewers with unrestricted access to the *Supervisor Assessment* feature in System Roles (Review Features > Review Features) can launch supervisor assessments.

To launch a supervisor assessment

1. Go to **Home > Workspace > Supervisor Assessments**.
2. Filter the Assessment list as necessary.
3. From a participant's action menu, select **Launch Assessment**.
4. Click **Start the assessment**. The Exam Disclaimer dialog opens.
5. Click **Confirm and Proceed**. The Exam Disclaimer dialog closes and the assessment launches. Depending on the OJT learning module configuration, you may have the option to select a language for the supervisor assessment when you launch it.
6. Answer each assessment question and click **Submit response**. At the end of the assessment the Supervisor Assessment Results page summarizes the assessment results.
7. To view the supervisor assessment exam questions and marks for each, click **Review Your Exam**. The Exam Review page opens, from which you can also review your question responses and open the questions for editing in the Question Editor (subject to your role's access permissions).
8. To return to the Supervisor Assessments page, click **Close Exam Window**.

Compliance Analytics

Compliance Analytics is available for the eLearning+ and Learning licenses.

About Compliance Analytics

Compliance Analytics performs a real-time analysis of training records to identify the degree (expressed as a percentage) to which departments, groups, and individuals have completed one or more specified courses. When scanning records, courses with an overall status of Completed, Finished Using, and Passed are interpreted as Completed for statistical purposes.

When calculating the overall compliance results for groups, each individual is interpreted as either conforming or nonconforming.

For example:

- Learner A in department X has completed 10 of 10 courses.
- Learner B in the same department has completed 2 of 10.

The percentage compliance overall for department X is 50% (1 of 2 compliant), while the training progress figure is 60% (12/20 courses completed).

Compliance Analysis Types

You can select the following types of analysis:

- Modules
- Program sessions
- Program progress

The Modules type considers transcripts for the selected target learning only and does not drill down into program components.

The Program Sessions type considers transcripts for modules in the selected target program session.

For the Program Progress type, for each selected target program session the analysis identifies an appropriate enrollment for the learner and produces results against transcripts within the identified enrollment's transcript hierarchy.

The following scenario shows the difference between the three analysis types:

- A program *P1* with a single session that contains a Module *O1*
- A learner completes *O1* as a standalone module
- Subsequently, the learner enrolls in *P1* and fails the component *O1*

The learner's records would look like this:

Transcript ID	Module ID	Status
T1	O1	Completed
T2	P1	In Process
T3	O1	Failed

Using default settings, the compliance analysis for the learner and program session would show the following results:

Type	Compliance Status	Considered Transcripts
Modules	Not Compliant	T2
Program Sessions	Compliant	T1
Program Progress	Not Compliant	T2, T3

Run Compliance Analytics

There are five steps to setting up compliance analytics:

1. Select the Participants.
2. Select the modules or program sessions, including possible equivalents.
3. Select the transcripts available for the participants and courses selected in the above steps.
4. Select the criteria for compliance-based dates, revision and enrollment.
5. Filter the results.

Those steps are applied in sequence, filtering out transcripts at each step. So it is possible to run compliance analysis for users with multiple enrollments within the time period selected, where, for example, the 'most recent' may not comply while a previous enrollment will comply.

> Reviewers with read-only access to the *Compliance Analytics* feature in System Roles (Manage Features > Compliance Analytics) can set up and run compliance analytics.

Step 1: Select Participants for Compliance Analytics

You can select participants for analysis individually (without grouping) or by one or the following grouping methods:

- One or more organizations
- One or more user groups
- One or more direct appraisers

To select participants for compliance analysis

1. Go to **Home > Reports > Compliance Analytics**.
2. To include all participants by organization, user group or appraiser, select a grouping criteria from the *Participants grouped by* drop-down list. To select participants individually, select **No grouping**.
3. Click in the **Organizations** or **User Groups** boxes to select them, or click the **browse** icon to select direct appraisers or individual participants. The appropriate selector dialog opens.
4. If you selected participants by organization or user group and you want to include participants with closed accounts, select the **Include closed user accounts** check box.

Step 2: Select the Modules or Program Sessions for Compliance Analytics

You can select the type of analysis and then the target modules or program sessions for the analysis.

To select the modules or program sessions for compliance analysis

1. Scroll to Step 2: **Target Learning**.
2. Select the analysis type from the drop-down list.
3. Click the **+** icon to select the learning modules or programs to include in the analysis.

Step 3: Select the Transcripts for Compliance Analytics

Compliance Analytics uses the transcripts for the participants identified in step 1 (Target Participants) and for the learning modules or program sessions selected in step 2 (Target Learning). You can further limit the transcripts to include in step 3 (Target Transcripts).

To select the transcripts for compliance analysis

1. Scroll to Step 3: **Target Transcripts**.
2. Select the check boxes if you want to include self-enrolled target transcripts and completed equivalent transcripts.

3. If a participant has multiple enrollments for a given course, select whether to match the compliance criteria against any of the participant's transcripts or only their most recent transcript.

Step 4: Select the Criteria for Transcript Compliance

In this step you define the criteria for transcripts to be compliant. You can select whether learning must have been completed between two specified dates, or whether learning is completed or on-target by a specified date in the future. (This can be used to identify participants who will lose their on-target status if they do not complete some learning by the specified date.)

You can select whether the learning can be from any revision or must be on the effective revision.

To select the criteria for compliance

1. Scroll to Step 4: **Criteria for Compliance**.
2. Select an option and the dates for Compliance Definition. This step is optional.
3. Select the Revision constraint.
4. Select an inclusion option for participants:

   - **All Target Learning** - Applies on to the Module analysis type.
   - **Learning in Enrolled Target Program Sessions** - Applies to Program Sessions and Program Progress analysis types. Completed sub-module transcripts are not counted if the participants have not yet enrolled in the program session selected in step 2. The analysis results for participants without any counted transcripts show N/A.
   - **Target Program Sessions with Auto-Enroll Criteria that apply** - Only participants who are auto-enroll targets for the selected program sessions are included in the compliance analysis. Leftover participants are reported as N/A in the analysis results.

5. To exclude transcripts for enrollments that are no longer required, select the **Disregard Deactivated Target Modules / Program Sessions** check box. The modules and sessions are marked as *N/A* instead of compliant or non-compliant if the participant's overall status for them is Deactivated.

Step 5: Filter Compliance Results

After compliance per participant has been calculated in Step 4, Compliance Analytics can further filter the results so that you can focus on the necessary information only.

You can choose to focus on:

- All Participants
- Compliant Participants Only
- Non-compliant Participants Only

You can also choose to include learners with no enrollments on any target learning. Learners with no enrollments are those reported as *N/A* in the analysis results.

To filter the compliance results

1. Scroll to Step 5: **Results Filtering**.
2. Select the participants to include in the analysis results, in terms of their compliance.
3. If required, select the check box to include learners with no enrollments on any target learning.
4. Click **Start Analysis**. The page refreshes with the compliance analysis results, which you can print and export to a comma-separated variable (CSV) file.

View Courses in the Integrated User Calendar

Reviewers with read-only access to the *Integrated User Calendar* feature in System Roles (Review Features > Review Features) can view the Integrated User Calendar.

You can view learners' scheduled courses in the Integrated User Calendar, and also enroll other learners you supervise. You can filter the calendar by:

- Organization
- Learning module
- Category
- Participant
- Instructor

To open the Integrated User Calendar, go to **Home > Workspace > Integrated User Calendar**.

External Training Records Field Reference

Use the table below to help you create or update an external training record, either for yourself or learners you review. You can create external training records for learners in their Learning Center in the Career Development Center. You review and update external training approval requests for learners on the External Training Approval page.

Field	Description	Mandatory
Title	Enter the title of the external course, up to 255 characters.	Y
Course Type	Select a course type from the drop-down list.	N
Subject	Select a subject from the drop-down list if any of those defined in the LMS match the subject matter of the external course.	N
Start Date	Select the start date of the external course.	Y
End Date	Select the end date of the external course or click **Autofill** to select the same date as the start date.	Y
Venue	Enter the external course's training venue.	N
Language	Select the language in which the training was provided.	N
Duration	Enter the duration of the training. You enter the duration in: • Minutes • Hours • Days • Weeks • Months	N
Course Cost	Enter the course cost and select the currency.	N
Grade	Enter the final grade if one was awarded.	N
Score	Enter the score if one was awarded.	N

Vendor Information	Enter any information about the external training provider.	N
Comments	Enter any comments about the external training.	N
Attachment	To attach a file to the external training record, click **Choose File**.	N
Status	Select the status of the external training record from the drop-down list: • Pending Approval • Approved • Approval Denied	Y

About Language Bundles

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

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

About User Targeting Templates

User targeting templates enable you to specify the criteria for selecting users and then use the template to select users, such as when setting permissions for viewing courses in the Catalog Browser or search results. When you create a user targeting template your selection criteria are saved in the template so that you don't have to keep specifying the same criteria for different features in the LMS.

Administrators can use user targeting templates to select users in the following user selectors:

- Permission Selector
- Appraisal Target Audience Selector
- Activate a System Language
- Create Token Package
- Terms of Use Manager

To manage user targeting templates, your user role must have unrestricted access to the *User Targeting Template Manager* feature in System Roles (Manage Features > User Manager Features).

To manage user targeting templates, go to **Manage Center > Users > User Targeting Template Manager**.

Set Access Permissions for a Template

When you create a user targeting template only your user account has access to it, and therefore only you can use it to select users. To allow other LMS users to access a template, you must give them read-only permission in the Permission Selector. To allow other LMS users to edit a template, you must give them unrestricted permission.

Editing and Deleting Templates

The Edit and Delete actions are available from the action menu only if you have unrestricted permission for the template.

User Targeting Template Support in Data Loaders

You can specify a user targeting template in the following data loaders:

- Role Access Data Loader
- Question Data Loader
- Equivalency Rule Data Loader

Note that to use a template in a data loader, the person uploading the CSV data file must have at least Read Only permission for the template.

Using a User Targeting Template as a Search Filter

When the *Enable User Targeting Template Search Filter* System Configuration setting is enabled, an advanced search filter is added to some pages (for example, Learning Modules) that enable you to search for all objects of the given type that use a given User Targeting Template for either read or write permissions.

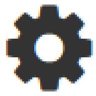
Additional Information

Create a User Targeting Template

User Targeting Templates in Data Loaders

Permissions

Action Menu



Action Menu Icon (legacy UI)

Action Menu Icon (Responsive UI)

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

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

Allowed Transitions Between Dynamic Attribute Types

Table: Allowed transitions between dynamic attribute types

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

Attribute Option Values

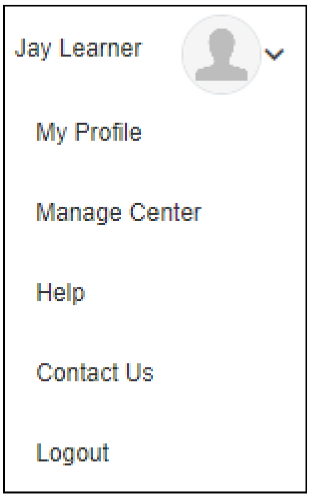
You can configure the options for drop-down list attributes.

Table: Attribute option fields

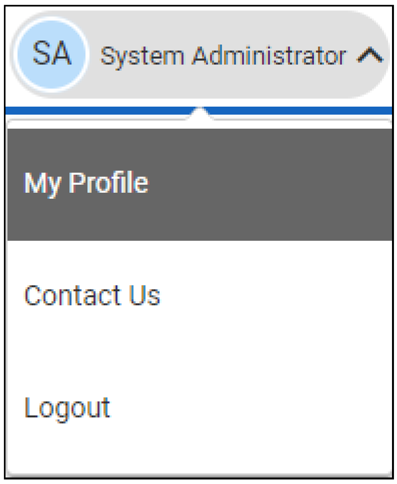
Field	Description
Code	Enter a unique identifier for the attribute's drop-down option value.
Label Key	Enter the label for the drop-down option value. This is the value shown in the drop-down where it appears in the LMS. For multi-language systems you can enter the label key that will be used to look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

Avatar Menu

Avatar Menu



Avatar Menu Icon (legacy UI)



Avatar Menu Icon (Responsive UI)

Figure: Comparison of Avatar Menus

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

Create a User Targeting Template

Administrators can use user targeting templates to select users according to specific criteria for various LMS features that target a defined set of users. To use user targeting templates, your user account's system role must have the required User Targeting Template Manager access control setting.

When selecting users to include in a template, you can combine one or more individually selected users with one or more user groups, organizations and roles.

> Because organizations can have a hierarchical structure, you can select organizations to include and those to exclude. This enables you to select a parent organization but exclude one or more of its child organizations.

To create a user targeting template

1. Go to **Manage Center > Users > User Targeting Template Manager**. The User Targeting Template Manager lists any user targeting templates that you have Read Only or Unrestricted access permission for.
2. Click **+ Create Template**. A new blank user targeting template opens.
3. Enter a unique code and a short, descriptive name for the template.
4. In the User Targeting Template settings box, select the users to include in the targeting template.
5. To select users in the Users box, start typing a user's ID or name and select a user from the auto-complete list, or click the Browse button to open the User Selector.
6. To select users from user groups, organizations and roles, select the criteria from the drop-down list and click **Add**. A selection box appears.
7. Click inside the selection box or on its title to select the user groups, roles or organizations to select the users from.
8. Click **Save**. The template is added to the list on the User Targeting Templates page.
9. To configure the access permissions for a template, select **Permissions** from its action menu.

Additional Information

About User Targeting Templates

User Selector

Permissions

Permissions

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

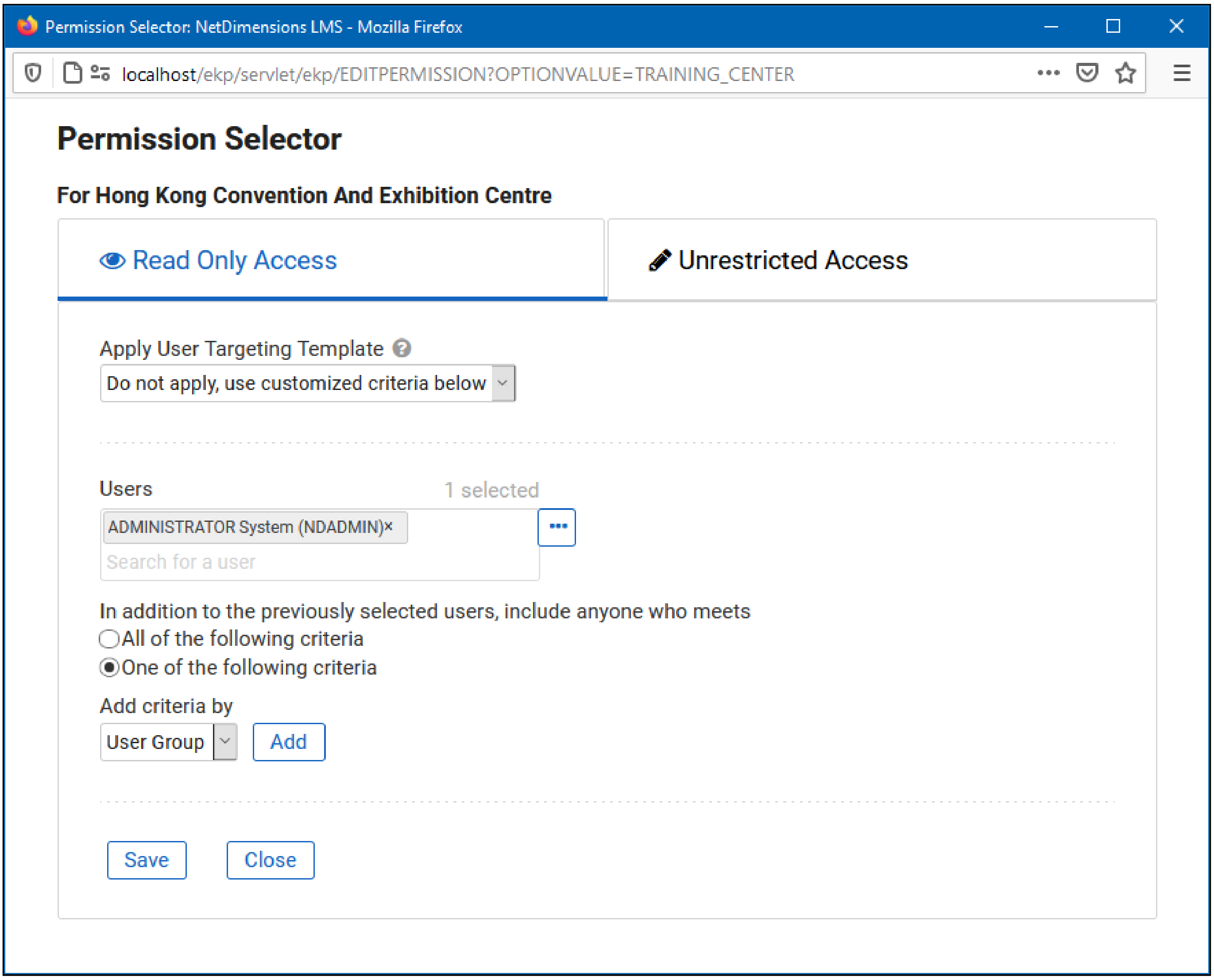


Figure: Permission Selector for Read Only Access to a Training Center

You can provide users with read-only or unrestricted access to many of the objects configured in the LMS, such as course catalogs, individual sessions, training centers and email templates, to name only a few. Read-only access allows user to view the object while unrestricted access allows users to view and modify it.

Selecting Users

There are several ways to select the users you want to configure access for:

- User targeting templates
- Selecting one or more specific users

- Selection criteria based on user group, organization or role
- Selection criteria based on organization attributes (for Auto-enroll and Job Profile Auto-assign permissions only)

User targeting templates are pre-defined selections of users. If you specify a user targeting template, you cannot select individual users or use other selection criteria.

You can combine one or more individually selected users with one or more user groups, organizations and roles.

Because organizations can have a hierarchical structure, you can select organizations to include and those to exclude. This enables you to select a parent organization but exclude one or more of its child organizations.

Additional Information

Select Users for Permissions

About User Targeting Templates

The Repository Manager

The PeopleFluent Learning Repository serves as a platform where organizations can add and manage files that are accessible across the system. These could include course materials for both learners and instructors, certificates, details about courses or training centers, and images utilized in course catalogs.

This content is administered in the Repository Manager. Here, an administrator can organize and manage uploaded files. Repository Manager has two areas:

- **Personal Folders** lists the folders and files you have created.
- **Shared Public Folders display the folders and files that fellow administrators have generated and shared with you.**

To perform these tasks, you must have *Repository Manager* feature in System Roles (Manage Features > Manage Features)

Create a Repository Folder

Repository content is organized in folders. As an administrator adding content, you will create additional folders in the Personal Folders area. Once a folder is created, you can define its access permissions so other LMS users, including learners, can access it.

When determining the folder structure, considering how you intend to arrange your files can be beneficial. For instance, organizing them by department, course, or organization.

To create a new folder

1. Go to **Manage Center > Learning > Repository > Repository Manager**.
2. Click **Create folder**.
3. Enter a folder name and description(optional).
4. Click **Create**.
5. To set permissions for the folder:
    a. Click the Permissions link.
    b. Select users and/or user groups to grant read only or full access permissions for the folder.
    c. Click Save.

6. By default, all sub-folders and content within the folder will inherit the folder's permissions. To change this,
    a. Click the Properties link.
    b. Clear the Folder permissions are inherited by subfolders..
    c. Click Save.
6. Click **Back to Repository**. The new folder is added to the list. Note: You may need to click **Refresh** to see the new folder in the Folders tab.

Upload a File to the Repository

In addition to uploading single files, you can upload multiple files in a zipped folder. When you upload the file, the system recognizes it as a ZIP file and prompts whether you wish to extract its contents. Note: All files extracted will have the same description (the filename) so you may want to update the descriptions individually.

You can also configure access permissions for files independently of those configured for the folder containing the file. To do this, be sure that the folder is not configured to force all content to inherit permission settings.

Uploading the same file more than once does not replace its previous versions, as all files have unique internal filenames in the LMS. To replace a file, see **Replace a File in the Repository** below.

To upload a file to the repository

1. Go to **Manage Center > Learning > Repository > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.
2. Click the folder you want to upload the file to. The folder's Overview page opens, where you can see its files and sub-folders.
3. Click **Upload**.
4. Click **Choose File** to select a file to upload.
5. Optionally, enter a description for the file. The description appears only in Repository Manager.
6. Click **Upload**. The Upload Results page opens.
7. Click **OK** to complete the upload, or **Cancel Upload** to cancel it.

Replace a File in the Repository

You can replace an existing file in the repository with a new file, and all references to the original file are updated to reference the replacement file.

To update a file with a new version, you must use the Replace function, not the Upload function. Uploading the same file more than once does not replace its previous versions, as all uploaded files are assigned unique internal filenames in the LMS. Replacing a file keeps its unique identifier.

> When you replace a file the LMS does not update the original file's name. If your replacement file has a different filename, and you want to use the new name in the LMS, you can change the file's name by updating its properties.

To replace a file with a new version

1. Go to **Manage Center > Learning > Repository > Repository Manager**.
2. Click the folder containing the file you want to replace.
3. Select the check box of the file you want to replace and click **Replace**.
4. Click **Choose File** to select a file to upload, replacing the original file.
5. Click **Upload**. The Upload Results page opens.
6. Click **OK** to complete the upload, or **Cancel Upload** to cancel it.

Configure File Access Permissions

If you have updated a folder's properties so that its files and sub-folders do not inherit its access permissions, you can configure the access permissions for its files and sub-folders individually. Remember that you must configure Read Only access for a file or its parent folder so that other LMS users, including learners, can access it.

Administrators with unrestricted access to the *Repository Manager* feature in System Roles (Manage Features > Manage Features) and unrestricted access permission on the file can set the access permissions for it.

To set the access permissions for a file

1. Go to **Manage Center > Learning > Repository > Repository Manager**. The Repository Manager opens in a new window and lists your personal folders.
2. Click the **[Properties]** link of the folder containing the file or sub-folder you want to set access permissions for. The folder's Overview page opens.
3. Clear the **Folder permissions are inherited by subfolders** check box if it is selected.
4. Click **Back to Repository** to return to the folder.
5. Click the **[Properties]** link of the file you want to set access permissions for. The file's Overview page opens.
6. Click **Permissions**. The Permissions Selector opens in a new window.
7. Assign the Read Only and Unrestricted Access permissions as required. For example, to enable all learners to view the file, in the Read Only tab add the Role criteria and select

the Learner role. When you save the permissions, the Permissions Selector closes and you are returned to the File's Overview page.

8. Click **Save**.

Transcript Detail Visibility

The data access control *Display Details, Progress, and Course Interactions when Reviewing Learner Transcript Detail* controls the reviewer's view of the transcript detail for those being reviewed. By default, only the System Administrator role has this access enabled.

An administrator can grant differing access to the transcript detail of those being reviewed to reviewers, direct appraisers, and instructors from the Organization Maintenance page. Similar to the *Level of Visible Transcript Detail for learners* option in System Configuration, the levels of transcript detail visibility can be set to:

- Completion Status Only
- Details and Overall Progress
- Details, Overall Progress, and Individual SCO Progress

  Shareable Content Object. These are the individual, reusable learning components within a SCORM package.
- Details, Overall Progress, Individual SCO Progress, and Course Interactions

The Transcript Detail page is not accessible from the Records/Transcript page for users with their visibility level set to *Completion Status Only*.

Users with visibility level set to any of the other options above have access to the Transcript Details page to view more transcript detail. Additionally, users with *Details, Overall Progress, Individual SCO Progress, and Course Interactions* have full access to all information on the Transcript Details page.

If a reviewer can view full transcript details, they can also open the Transcript Details page by clicking the course title links. In the Active/Archive Course areas of the Teach menu, full transcript detail is always displayed except when a transcript is in Pending Approval or Waitlisted status in User Review. The level of transcript detail available under the Administrative Access area is controlled by the same rule as the CDC.

Instructors are usually able to see full transcript details. However, in some highly regulated countries, even instructors are not allowed to have access to transcript details like question responses and scores. In cases like this, the LMS has a feature to control the level of transcript details instructors can view, which is configurable at the organization level. This setting complements the other two options that apply to the direct appraiser or to reviewers in general.

When the reviewer is both an instructor of the course and the direct appraiser of the learner, whichever has the greater level of visibility is granted to the reviewer.

User Selector

You select users to include in permissions or other user targeting features in the User Selector. To select users, you search for them with the optional search criteria and then select from the results those users you want to include.

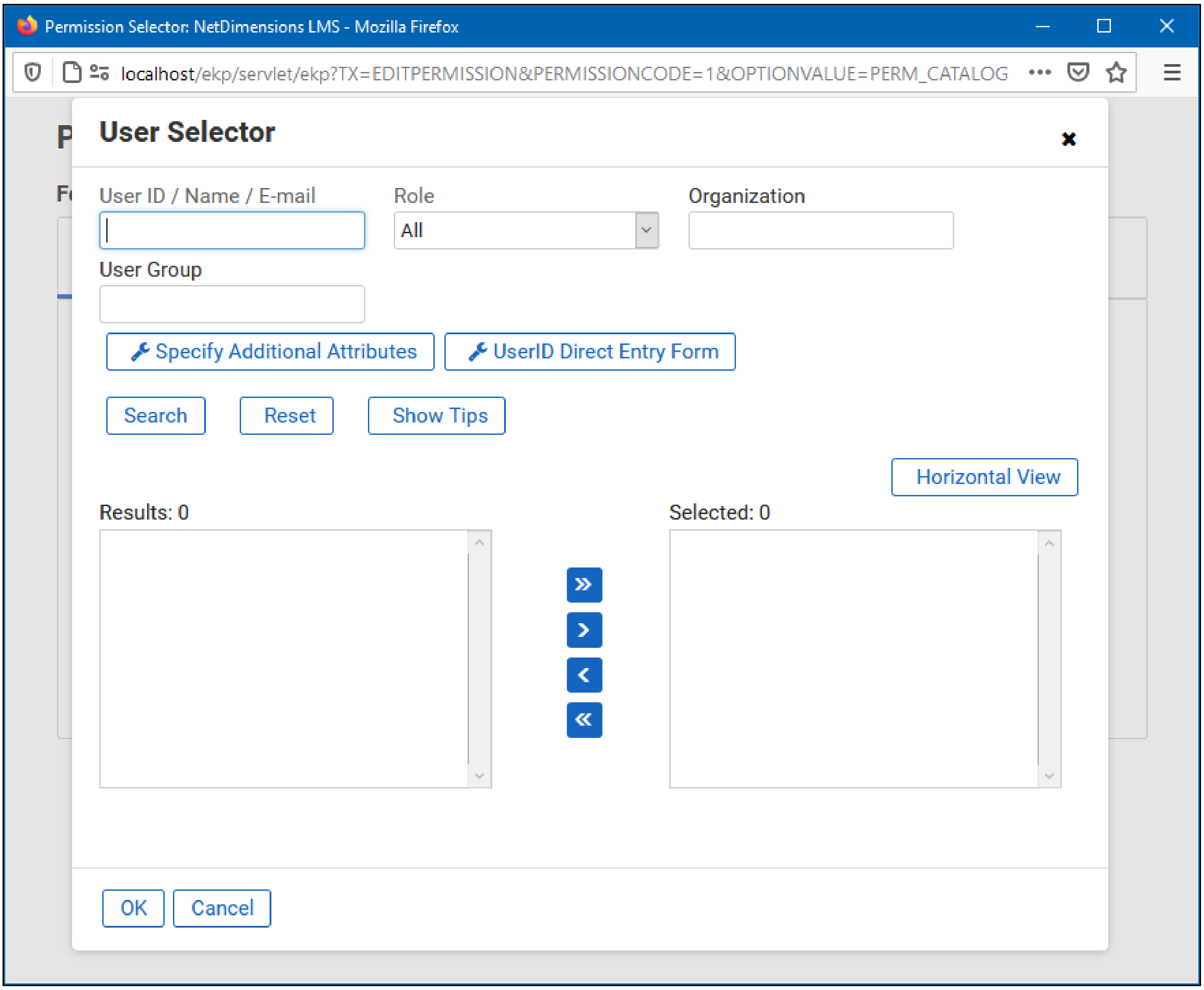


Figure: User Selector Accessed from the Permission Selector

The User Selector is available from various administration pages in the LMS where you can select users to target, including the Permission Selector and User Targeting Template Manager.

To select one or more users to include in the selection

1. Click the browse icon next to the Users field. The User Selector page opens on top of the page you called it from. Any users already selected in the Users field are included in the Selected box in the User Selector.
2. Enter or select criteria to filter the search for users (you can use advanced search syntax in the User ID / Name / E-mail field).

3. Optionally, click **Specify Additional Attributes** to search for users with specific profile criteria, including any User Attribute values. If you specify additional attributes, ensure their criteria do not contradict any in the User ID / Name / E-mail, Role, Organization or User Group fields above.
4. Optionally, click **User ID Direct Entry Form** to enter one or more User IDs, either directly or copied and pasted in from a plain text file or spreadsheet. The User ID Cut and Paste Direct Entry Form page opens in a new window and includes instructions for how to enter a list of User IDs.
5. Click **Search** to list all users meeting your search criteria.
6. To select individual users from the Results box, `Ctrl`+click to select separated individual users or `Shift`+click to select a contiguous block of users and then click the right-facing chevron icon to move them over to the Selected box.
7. To select all of the users in the Results box, just click the right-facing double chevron icon to move them over to the Selected box.
8. Click **OK** to confirm your selection and close the User Selector.

Additional Information

Permissions

About User Targeting Templates

User Targeting Templates in Data Loaders

When you specify a user targeting template in a data loader, you can choose whether subsequent changes to the user targeting template will be applied to the LMS object that uses it to select users (for example, System Roles). If not, the user targeting template criteria are copied to the LMS object and any subsequent changes to the user targeting template are not applied.

The following table describes the data loader fields you use to specify how the user targeting template will be applied to the LMS object.

Table: User Targeting Template Fields in Data Loaders

Field	Description
Read Permissions Template	Enter the code of the template to use for read permissions.
Write Permissions Template	Enter the code of the template to use for write permissions.
Target Audience Template	Enter the code of the template to use for target audience.
AssignReadTemplate	Enter L to link to the user targeting template as the permission targeting criteria. Subsequent changes to the template will be applied to the targeting criteria. Enter C to completely copy and replace the permission settings on this object using the current configured settings from the user targeting template. Subsequent changes to the template are not applied to the targeting criteria.
AssignWriteTemplate	Enter L to link to the user targeting template as the permission targeting criteria. Subsequent changes to the template will be applied to the targeting criteria. Enter C to completely copy and replace the permission settings on this object using the current configured settings from the user targeting template. Subsequent changes to the template are not applied to the targeting criteria.

AssignTargetAudienceTemplate	Enter `L` to link to the user targeting template as the target audience criteria. Subsequent changes to the template will be applied to the targeting criteria. Enter `C` to completely copy and replace the target audience settings on this object using the current configured settings from the user targeting template. Subsequent changes to the template are not applied to the targeting criteria.

For the Equivalency Rule Data Loader the Target Audience will be set to specified user targeting template even if the *Apply Target Audience to All Organizations* data loader option has been enabled.

Additional Information

About User Targeting Templates

Create a User Targeting Template