PeopleFluent Learning

Instructor Guide

Release 24.09

Contents

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Website: peoplefluent.com

Instructor Guide

As an instructor, effective management of your courses and learners is essential for creating a productive learning environment. PeopleFluent Learning provides instructors with the the tools and strategies needed to engage with participants effectively, streamline course administration, and foster a collaborative atmosphere.

Specifically, instructor tasks include:

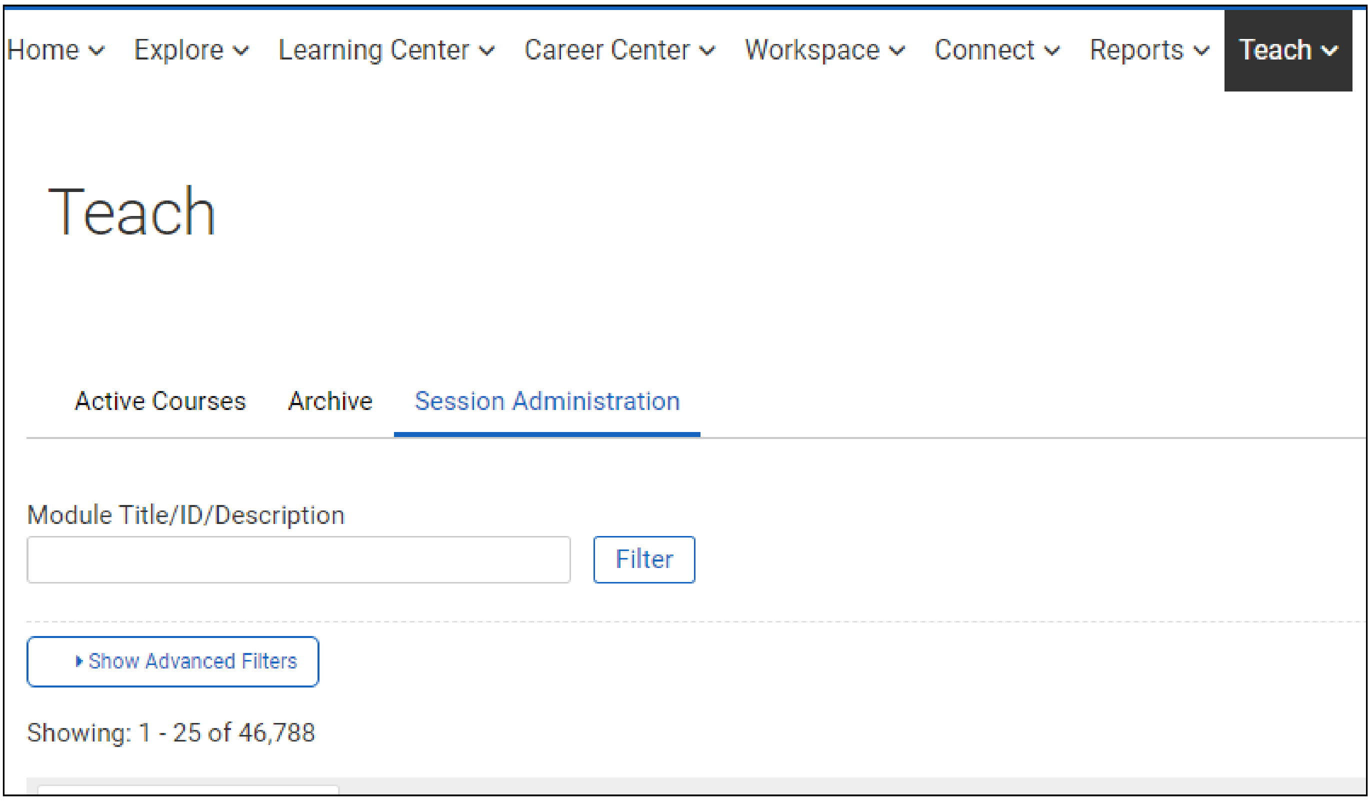
- Participant management including enrollment, attendance, status, exams and certifications.
- Class resource management such as the Knowledge Center, references, forums and checklists.

Access Instructor Features

As an instructor, you can oversee courses and sessions you teach by managing participants, course details, properties, and resources. Accessing the Knowledge Center lets you communicate with learners and other instructors, share files, access resources, and moderate course forums.

Instructor-oriented tasks are primarily managed via the **Teach** page, which is accessed from the **Teach** menu.

To access instructor-oriented features in the Teach page, your system role must have read-only access to the *Instructor* feature in System Roles (Review Features > Review Features).



About the Teach Tabs

There are three tabs available on the Teach page:

- The **Active Courses** tab displays an instructor's active classes. Depending on permissions, you can enroll learners, review participants, and update attendance, transcripts, and grades.
- The **Archive** tab shows completed classes. Various actions can be taken here, depending on your role's access and permissions.

- The **Session Administration** tab displays all learning module sessions with unrestricted or read-only access, regardless of the user's instructor assignment. Instructors with appropriate permissions can take similar actions here as in the Active Courses tab. Bulk updates to sessions are also possible. Users can select various actions from the action menu for each session, subject to their role permissions.

Manage the Columns Displayed in the Teach Tabs

You can customize the columns in the class lists on the Teach tabs to suit your requirements. Various column options are available, although not all may appear by default. You can add or remove columns as needed to ensure access to the necessary information for your tasks.

You have the option to create column presets, which save specific column configurations for easy access. For instance, you could set up a preset displaying essential class information like Title, Start Date, End Date, and Seats Registered. This preset enables quick access to these columns.

To change the columns in the session list

1. Go to **Home > Teach** and select the Teach page tab you want to customize.
2. Click the **Columns** drop-down field in the table header and take one of the following actions:

    - To use a saved column preset, select the appropriate option from the list. The session list is updated to show the columns selected in the preset.
    - To manually specify the columns:

        a. Click **Customize**.
        b. To remove a column, click on the column name in the **Visible Columns** section and it will be moved to the **Invisible Columns** section. Conversely, to add a column, click on the column name in the **Invisible Columns** list and it will be moved to the **Visible Columns** section.
        c. If you would like to save the column configuration as a preset, click **Save As Preset**. Otherwise, click **Apply**.

To delete a preset, select **Manage** from Columns drop-down field and select **Delete** from the actions menu. You can also delete presets as a bulk action.

Filter the Class List in the Teach Tabs

There are several search and filter options that allow you to locate and manage the appropriate classes.

To filter the class list:

1. Go to **Home > Teach** and select the Teach page tab you want to filter.
2. To search for courses by title, ID or description, enter some or all of the title, ID or description in the **Module Title/ID/Description** field and click Enter.
3. To filter the list on one or more criteria, click **Show Advanced Filters**. The filters are shown.
4. Enter or select the required filters and click **Filter**.
5. To display the list with no filtering, click **Reset** and then **Filter**.

Review and Update Participant Information

You have the ability to modify information regarding class participants to reflect changes in their enrollment status and other relevant changes.

> This topic provides general information about how to access and make updates for individual learners on the Review Participants page and within a learner's transcript. More detailed information about certain tasks, as well as information that can be updated in bulk, is available in the following topics; Change the Overall Status of Class Participants, Grant a Class Participant Additional Attempts, Manage Class Attendance

> You can view and manage session participants for learning module sessions to which you have read-only or unrestricted access.

Viewing Class Participants

To view class participants

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session and select **Review Participants** from the action menu.
   Filter the participants list as necessary.

Customize the Participant List Columns

You can customize the columns in the participants list to meet your needs. Various column options may not be displayed by default, but you can add or remove columns as needed to access relevant information for your tasks.

Additionally, you can create column Presets, which save specific column configurations for quick access. For example, you might create a Preset displaying basic participant information such as Name, Start Date, and Completion Date.

To change the columns in the participant list

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session and select **Review Participants** from the action menu.

3. Click the **Columns** drop-down field in the table header and take one of the following actions:

   - To use a saved column preset, select the appropriate option from the list. The participant list is updated to show the columns selected in the preset.
   - To manually specify the columns:

     a. Click **Customize**. The Customize Columns dialog opens.
     b. To remove a column, click on the column name in the **Visible Columns** section and it will be moved to the **Invisible Columns** section. Conversely, to add a column, click on the column name in the **Invisible Columns** list and it will be moved to the **Visible Columns** section.
     c. If you would like to save the column configuration as a preset, click **Save As Preset**. Otherwise, click **Apply**.

To delete a preset, select Manage from Columns drop-down field and select Delete from the actions menu. You can also delete presets as a bulk action.

Export the Class Participants List

You can export a filtered or unfiltered participants list from the Review Participants page to a comma-separated values (CSV) file for recording outside of the LMS. The exported CSV file contains all the columns selected for the Review Participants page.

To export the participant list

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session and select **Review Participants** from the action menu. Filter the participants list as necessary.
3. Click **Export to CSV**. The CSV file is downloaded to your browser's configured download folder.

Updating Participant Information

You can update participant information from the Review Participants page. Depending on the default information displayed, you might need to customize the participant list to ensure necessary columns, such as Overall Status Change, are visible.

To update participant information

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session and select **Review Participants** from the action menu. Filter the participants list as necessary.

3. Enter or select the information to update. To change the overall status for multiple participants, select their check boxes and then select **Change Overall Status** from the Bulk Actions drop-down list.
4. Click **Submit**.

Viewing and Updating Participant Information from the Transcript

Instructors have access to view a class participant's transcript details and can make certain updates to the transcript. These updates generally align with those available on the Review Participants page.

To view a participant's transcript details, your system role must have at least read-only access to the *Detailed Review by Instructor* feature in System Roles (Review Features > Review Features), and *Third-Party Transcript Viewing Permission* configured for the learning module (Catalog Editor > Define Module Security). To update transcript details, your system role must have unrestricted access.

To view a participant's transcript history, your system role must have read-only access to the *Review Transcript History* feature in System Roles (Review Features > Review Submenu Features)

To review a participant's exams, your system role must have read-only or unrestricted reviewer permission for the exam (Exam Editor > Details tab).

To access and update a participant's transcript:

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session and select **Review Participants** from the action menu. Filter the participants list as necessary.
3. Click a participant's name. Their transcript details page opens in a new window.
4. Review the transcript and update the enrollment details and attributes, if required.
5. Click an exam name to open the Exam Review page for the exam attempt, if required. For additional information about reviewing exams, please see Review Participant Exams.
6. Click **Save** to save any changes you made.

Enroll Participants in a Class

From the Review Participants page, you have the option to enroll one or more learners in a course session.

> To enroll learners, your system role must have unrestricted access to the *Enroll Participant from Teach Review* feature in System Roles (Review Features > Review Features).

To enroll learners in a session

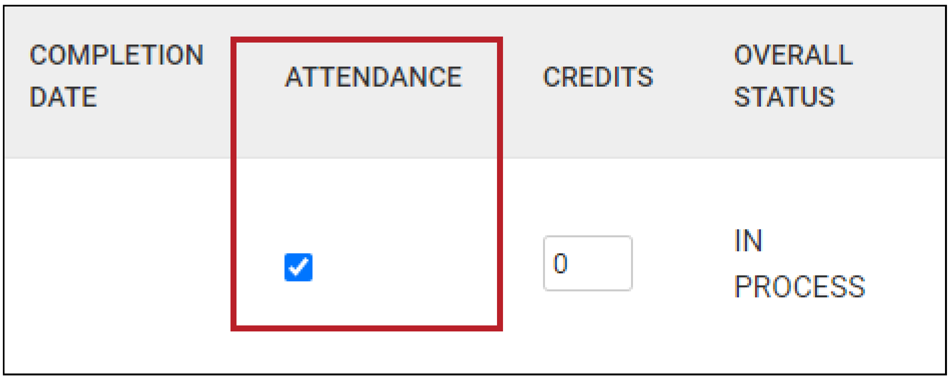
1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session and select **Review Participants** from the action menu. Filter the participants list as necessary.
3. Click **+ Enroll Users**.
4. Click the **+** icon. The Selector page opens in a new window.
5. Select the learners to enroll in the session and click **OK**. The selected learners are added to the **Participant(s)** box in the Enroll Users dialog.
6. Select or clear the check boxes for suppressing automatic emails and ignoring schedule conflicts, as required.
7. Enter a cost center name to be charged, if required.
8. Optionally, select the deadline date for completing the session.
9. Optionally, select a start date restriction so that learners cannot launch the course before that date.
10. Optionally, and where applicable, select the language for course delivery, or allow the participant to select the language on launch.
11. Click **Enroll**. The enrollment processing status is shown for each participant.

Manage Class Attendance

Mark Attendance for an Individual Participant

To mark attendance for an individual participant:

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session and select **Review Participants** from the action menu. Filter the participants list as necessary.
3. In the **Attendance** column, click the checkbox to mark the participant as attended. Clear the checkbox to remove attendance.
4. Click **Submit**. The status is changed.



Mark Attendance for Multiple Participants

Attendance for participants can be marked in bulk through the Bulk Action menu. For sessions spanning multiple classes, you can mark attendance individually for each class, with the flexibility to deselect participants who were absent.

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session and select **Review Participants** from the action menu. Filter the participants list as necessary.
3. Click the checkbox for each applicable participant.
4. In the **Bulk Actions** drop-down menu, select **Mark Attendance**.
5. The **Attendance** checkbox is selected for each participant, marking them as having attended the session. To reverse this, clear the checkbox.
6. Click **Submit**. The changes are saved. Transcript/Records for users marked as having attended are updated.

Print (Download) an Attendance Sheet

You have the option to print a class attendance sheet for offline updates outside the LMS. Printing the sheet will download an electronic copy to your local system. Various types of attendance sheets are available, each containing different information.

- **R210 Attendance Sheet** - This attendance sheet is generated as a PDF file and downloaded.
- **R210B Attendance Sheet** - This attendance sheet includes the total number of participants for the course. It downloads a spreadsheet in XLS format for viewing or editing in Microsoft Excel or other applications that support XLS files.
- **R210C Attendance Sheet (PDF)** - You can use this option to generate a single attendance sheet for sessions with no dates, a daily sheet for session with dates spanning the period that are working days, one sheet for each class schedule if the session has multiple schedules.
- **R210D Standardized Attendance Sheet (PDF)** - This report lists all the participants enrolled in the specified course session(s) in a standardized format. Company logos can be incorporated by replacing the following files in the nd/fresco/images/logos directory: ReportR210DLogoTop.png and ReportR210DLogoBottom.png.
- **R210E Simple Attendance Sheet (PDF)** - This report is a simple form of report R210D. It lists all participants enrolled in the specified course session(s) in a standardized format. It is run as a batch report, which you can download from Report Manager > Batch Report. Company logos can be incorporated by replacing the following files in the nd/fresco/images/logos directory: ReportR210DLogoTop.png and ReportR210DLogoBottom.png.

The attendance sheets are also available as Learning reports in the Report Manager.

To print an attendance sheet

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session and select **Review Participants** from the action menu. Filter the participants list as necessary.
3. Click **Print Attendance Sheet**.
4. Select the appropriate attendance sheet type. The attendance sheet is downloaded to your browser's configured downloads folder.

Upload an Attendance Sheet

If you have printed an attendance sheet and made updates outside the LMS, you can upload it in any session list on the Teach page. If there's already an uploaded attendance sheet, you can only download or delete it. To upload an updated sheet, you must first delete the existing one.

To upload an attendance sheet:

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session and click **Upload Attendance Sheet** from the action menu.
3. Click **Choose a file** to browse for the attendance sheet to upload.
4. Click **Upload**. The attendance sheet is uploaded.

Change the Overall Status of Class Participants in Teach

Instructors can manage the class status for enrolled participants. This can be executed either for individual participants or for multiple participants simultaneously using a bulk action.

Guidelines for Changing Overall Status

Modifying a participant's overall status can impact their eligibility for competencies and certifications, potentially leading to new awards or revoking existing ones. Therefore, specific limitations apply when altering the overall status:

- You can only update a participant's most recent transcript from Completed to Incomplete status.
- Before changing a sub-module transcript from Completed to Incomplete, all program transcripts linked to the learner must be set to Incomplete if they are affected by that particular transcript.

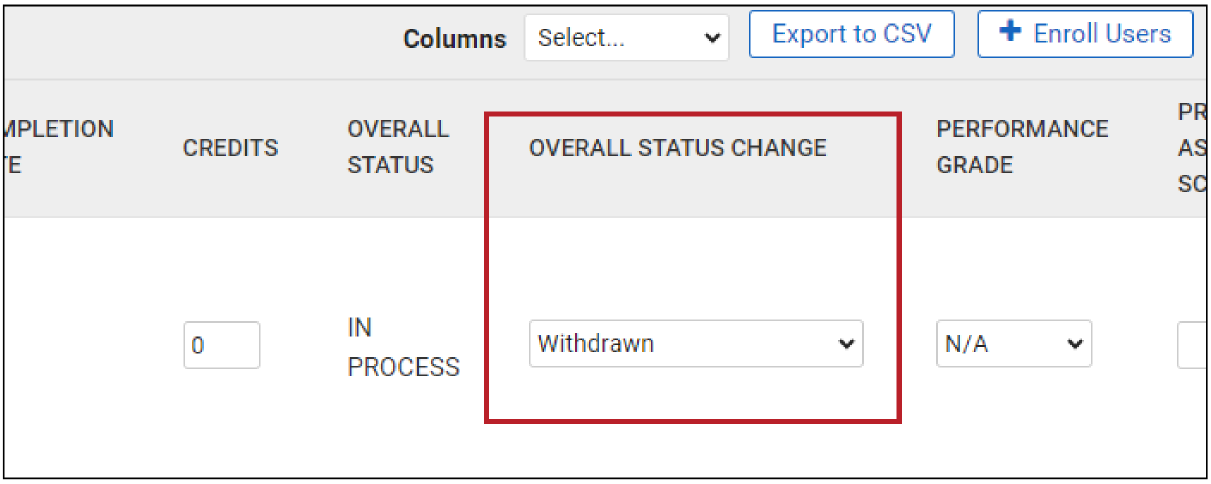
Additional information about acceptable status transitions:

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

Changing the Overall Status for an Individual Participant

To change the overall status for an individual participant:

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session and select **Review Participants** from the action menu. Filter the participants list as necessary.
3. In the **Overall Status Change** column, select a status option.
4. Click **Submit**. The status is changed.



Changing the Overall Status for Multiple Participants

To change the overall status of multiple participants:

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session and select **Review Participants** from the action menu. Filter the participants list as necessary.
3. Click the checkbox for each applicable participant.
4. In the **Bulk Actions** drop-down menu, select **Change Overall Status**.
5. In the **Change Status** window, select a status option from the **Please select status** field.
6. The table displays what the status change will be. Click **Set**.
7. You are returned to the Review Participants page. Click **Submit**.
8. You will receive a message letting you know if your update action was successful. Click the **Back** button to return to the Review Participants page.

Review Participant Exams

If you have reviewer permissions for a class exam, you can view participant exam attempts. For inquiries regarding your permissions for a specific course, please reach out to the course administrator. Exams assigned to a course are listed under the Exam Attempts and Results section of the participant's transcript.

To review an exam in a participant's transcript:

1. In the appropriate course, access the transcript for the user you are reviewing.
2. Locate the **Exam Attempts and Results** section.
3. Click the exam title. The **Exam Review** page opens in a new window. The following summary information is provided.
   - Exam properties
   - Results broken down by section
   - Questions
   - Points awarded for each question
4. You can take one or more of the following actions.
   - Drill down to an exam summary for the participant
   - Change the exam status to *Passed*, *Failed,* or *For Retake.* You are required to provide a comment when changing exam status. **Note**: Your system role must have the **Allow Exam Remedial Training Comments Data Access Role** permission to perform this action.
   - View the participant's responses to each question
   - Leave a remedial training comment
   - Download a printer-friendly PDF of the questions and the participant's responses
   - Download a printer-friendly PDF record of the exam pass or failure

Grant a Class Participant Additional Attempts

Participants may have multiple attempts at a course or learning module. This is managed by a configuration set at the course level by the Course Administrator, specifying the number of attempts allowed. Instructors can grant additional attempts if permitted. For inquiries about specific course or module setups, please reach out to the Course Administrator.

> You cannot grant additional attempts to learners if their Overall Status is *Completed, Waiver/Exempt, Passed, Finished Using, Cancelled,* or *Failed*.

To grant additional attempts

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session and select **Review Participants** from the action menu. Filter the participants list as necessary.
3. If the **Attempts Taken** column is not included in the sessions list, select **Customize** from the Columns drop-down list to add it.
4. Click the Attempts Taken value for the participant. The **Grant Additional Attempts** dialog opens.
5. Enter the number of attempts to grant the participant (in addition to any they may have remaining).
6. Enter a reason for granting the additional attempts.
7. Click **Submit**. The Attempts Taken value is updated with the number of attempts remaining.

Print Participant Certificates

Instructors can print certificates of completion for participants within a session. By default, certificates are only available for participants marked as Completed. However, with the "Allow Print Certificate on or before Session End Date" permission, you can print certificates for participants before the session end date. This permission enables printing for any participant, regardless of status. When printing certificates for multiple users from the Review Participants page, they are consolidated into a single PDF file, saved in your browser's designated download folder.

> Your organization may have configured transcript sub-statuses to allow for different types of course completion. For example, the Completed status may have sub-statuses such as *Completed with Merit* or *Completed with Distinction*.

To print certificates for one or more participants

1. On the **Review Participants** page, filter the list as necessary.
2. Click **Print Certificate**. The PDF is saved to your browser's configured downloads folder.

Working in the Class Knowledge Center

The Knowledge Center offers learners course information and facilitates communication and file sharing with instructors. Instructors can perform various actions based on the Knowledge Center's configuration.

To access and manage the Knowledge Center, your system role must have unrestricted access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features).

Open or Download Reference Resources in the Knowledge Center

When the course was created, the course administrator may have provided online resources for both participants and instructors. These resources could be URLs linking to external files, files uploaded to the LMS Repository, or links to embedded content like YouTube videos. They can be accessible to instructors alone or to both instructors and learners.

To open or download resources

1. Go to **Home > Teach** and select the Teach page tab you want to access.
2. Locate the appropriate session.
3. Click on the action menu and select **Launch Knowledge Center**.
4. Select **Reference Resources** from the menu on the left.
5. To open or download a resource, click its filename.

Share Files in the Knowledge Center

If file sharing is activated for the class, learners and instructors can exchange files.

To share files with learners

1. Go to **Home > Teach** and select the Teach page tab you want to access.
2. Locate the appropriate session.
3. Click on the action menu and select **Launch Knowledge Center**.
4. Select **File Share Area** from the menu on the left. The File Share Area is divided into three lists:
    - **File Share Area** - This area is open to both instructors and learners to share files with each other.
    - **Submitted Homework** - In this area, learners can upload homework files for specific instructors.

- **Marked/Reviewed Homework** - Here, instructors can upload homework files they have reviewed.

3. To download a file, click its filename.
4. To upload a file:
    a. Scroll to the **Upload Files** section.
    b. Select the file type from the **File Type** drop-down list.
    c. If you selected **Marked/Reviewed Homework**, choose an option in the **Select participant** field to share the file only with the appropriate participant.
    d. Click **Choose a File** and select the file to upload from your local system.
    e. Optionally, add a brief description of the file.
    f. Click **Upload**. The file is uploaded.

Review Peer Comments in the Knowledge Center

Instructors can review participant ratings and comments in the Knowledge Center if ratings and peer reviews are enabled. They can up-vote or down-vote comments but can't directly reply. However, they can use contact options to address any raised issues with participants.

To review ratings and peer comments

1. Go to **Home > Teach** and select the Teach page tab you want to access.
2. Locate the appropriate session.
3. Click on the action menu and select **Launch Knowledge Center**.
4. Select **Peer Comments** from the menu on the left. The ratings and comments are listed with the number of people who found each comment useful or not (based on up-votes and down-votes)
5. Click **Peer Comments**. The ratings and comments are listed with the number of people who found each comment useful or not.
6. Click **Yes** or **No** for each comment to up-vote or down-vote the usefulness of the comment.

Contact Group Members (Class Participants) in the Knowledge Center

Instructors have the ability to reach out to participants through the Knowledge Center. They can email participants individually or as a group. Additionally, instructors can access a participant's profile from this page.

To contact group members

1. Go to **Home > Teach** and select the Teach page tab you want to access.

2. Locate the appropriate session.
3. Click on the action menu and select **Launch Knowledge Center**.
4. Select **Contact Group Members** from the menu on the left. Participants for the session are listed.
5. Take one of the actions below:

    - To send an email to all participants, click **Send Mail to all Members**. An email form opens in the new window.
    - To send an email to an individual, click **Send Mail** under their name. An email form opens in the new window.
    - To view an individual's profile, click **View Profile** under their name. Their profile summary opens in a new window.

Contact Instructors in the Knowledge Center

In the Knowledge Center, session instructors have the option to communicate with each other. They can send emails to other instructors individually or as a group. Additionally, instructors can access an instructor's profile from this page.

To contact instructors

1. Go to **Home > Teach** and select the Teach page tab you want to access.
2. Locate the appropriate session.
3. Click on the action menu and select **Launch Knowledge Center**.
4. Select **Contact Instructors** from the menu on the left. The instructors for the session are listed.
5. Take one of the actions below:

    - To send an email to all instructors, click **Send Mail to all Instructors**. An email form opens in the new window.
    - To send an email to an individual instructor, click **Send Mail** under their name. An email form opens in the new window.
    - To view an instructor's profile, click **View Profile** under their name. Their profile summary opens in a new window.

Manage Reference Resources

Online resources can be provided for both class participants and instructors. These resources may include external URLs, files uploaded to the LMS repository, or links to embedded content, such as YouTube videos.

During setup, the course administrator may have included Reference Resources. Instructors can access these resources and upload additional ones from the Knowledge Center.

> To manage reference resources for a session, your system role must have the *Allow session level reference resource upload from Teach* permission in System Roles (Data Access Control > Role General Permissions).

To manage reference resources

1. Go to **Home > Teach** and select a Teach page tab.
2. Locate the appropriate session.
3. Click the action menu and select **Manage Reference Resources**.
4. To add a reference resource:
    a. Click **+ Add New Reference**.
    b. Enter a URL or click the browse button to select a file from the repository.
    c. Enter a description.
    d. Select whether learners and instructors can access the resource from the Knowledge Center.
    e. Select the reference type.
    f. Click **Add**. The resource is added to the page.
5. To preview a resource, click its name or select **Preview** from its action menu.
6. To delete a resource, select **Delete** from its action menu.

Moderating Forums

Discussion forums offer an online space for learners and instructors to discuss courses and exchange questions and answers. Learners can seek clarification on specific topics and benefit from each other's insights. Instructors can oversee forums as moderators, intervening when necessary.

In courses with enabled forums, you can view, create, and delete topics within the assigned category. Depending on your system role permissions, you may also edit forums, adjust access permissions, and delete them.

To access forums from the Knowledge Center, your system role must have at least read-only access to the *Knowledge Center* feature in System Roles (Learner-oriented Features > Learn Features), and unrestricted access to the Forum feature (Learner-oriented Features > Communicate Features).

To edit, delete and set permissions for forums, your system role must have unrestricted access to the *Discussion Forums* feature in System Roles (Mange Features > Community Manager Features).

To create and delete forums, and delete others' forum topics and replies, you system role must have the *Allow Forum Moderation* permission in System Roles (Data Access Control > Role General Permissions).

View and Reply to Forum Topic Posts

You can view and reply to forum posts and subscribe to forums to receive a daily email with updates, such as new posts.

To view and reply to forum topic posts

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session.
3. Click on the action menu and select **Launch Knowledge Center**.
4. Click **Forum**. The forum category assigned to the course is listed.
5. Click the forum category title. The forum category opens in a new window and lists the forums assigned to it.
6. Click the name of the forum you want to view. The forum topics are listed in order of recency: topics with the most recently added posts are shown first.
7. Click a topic name to view its post and any replies.
8. To reply to a topic post or one or its replies, click **Reply** below the post.

Create a New Forum Topic

Forum topics are used to discuss a particular issue or subject. Learners and instructors can create a new topic to ask a question or provide information related to a course, for example.

To create a new forum topic post

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session.
3. Click on the action menu and select **Launch Knowledge Center**.
4. Click **Forum**. The forum category assigned to the course is listed.
5. Click the forum category title. The forum category opens in a new window and lists the forums assigned to it.
6. Click the name of the forum you want to create a new topic in. The forum topics are listed in order of recency: topics with the most recently added posts are shown first.
7. Click **+ New Topic**. The New Topic dialog opens.
8. Enter the topic title and the message, and then click **Submit**. The topic is added to the top of the topic list in the forum.

Delete a Forum Topic or Reply

Individual users can delete their own topics and replies, while forum moderators can also delete topics and individual replies posted by others.

To delete a forum topic or reply

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session.
3. Click on the action menu and select **Launch Knowledge Center**.
4. Click **Forum**. The forum category assigned to the course is listed.
5. Click the forum category title. The forum category opens in a new window and lists the forums assigned to it.
6. Click the name of the forum to see its topics. The forum topics are listed in order of recency: topics with the most recently added posts are shown first.
7. Take one of the actions below:

   - To delete a topic and all of its replies, select **Delete** from the topic's action menu. You are asked to confirm the deletion.
   - To delete individual replies in a topic:

     a. Click the topic name. The original topic post and its replies are shown.

b. Select Delete from the action menu of the reply. You are asked to confirm the deletion.

Edit a Forum in the Knowledge Center

Users with the appropriate permissions can edit forums in the Knowledge Center. Updates can be made to the forum name, description and type (View only, Reply only, Reply or create topic).

To edit a forum

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session.
3. Click on the action menu and select **Launch Knowledge Center**.
4. Click **Forum**. The forum category assigned to the course is listed.
5. Click the forum category title. The forum category opens in a new window and lists the forums assigned to it.
6. Click the forum category title. The forum category opens and lists the forums assigned to it.
7. Select **Edit** from a forum's action menu. The Edit Forum dialog opens.
8. Update the name, description and type as required. Additional information about forum types:

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

5. When you have completed your updates, click **Save**.

Update Forum Permissions

Users with appropriate permissions can update forum access permissions to specify which users can view or create posts in them.

To update a forum's access permissions

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session.
3. Click on the action menu and select **Launch Knowledge Center**.

4. Click **Forum**. The forum category assigned to the course is listed.
5. Click the forum category title. The forum category opens in a new window and lists the forums assigned to it.
6. Click the forum category title. The forum category opens in a new window and lists the forums assigned to it.
7. Select **Permissions** from a forum's action menu. The Permission Selector opens in a new window.
8. Select the users for read-only and unrestricted access as required, and then click **Save**.

Delete a Forum from the Knowledge Center

As a forum moderator, you can delete forums from the Knowledge Center. When you delete a forum all of its topics and replies are deleted. If you want to preserve the topics and replies in a forum, but do not want other users to see them, you can update its permissions to restrict access.

To delete a forum

1. Go to **Home > Teach** and select the appropriate Teach page tab.
2. Locate the appropriate session.
3. Click on the action menu and select **Launch Knowledge Center**.
4. Click **Forum**. The forum category assigned to the course is listed.
5. Click the forum category title. The forum category opens in a new window and lists the forums assigned to it.
6. Click the forum category title. The forum category opens in a new window and lists the forums assigned to it.
7. Select **Delete** from a forum's action menu. You are asked to confirm the deletion.

Review and Manage Course Checklists

As an instructor, you can review and manage course checklists assigned to you. You can view checklist items in the Workspace or in the Learning Module's Catalog editor.

Review and Manage Checklists in Workspace

To review a course checklists in Workspace

1. Go to **Home > Workspace > Course Checklist**. The Course Checklist page opens and lists all incomplete items assigned to you.
2. Select the course and session from the drop-down lists and click **Filter**.
3. To update the status of an item to **Completed**, click its **check mark** icon. Its status is updated to Competed with the current date, time and your user name. Repeat this step for all items you want to mark as completed.
4. To revert the status of a completed item to Incomplete, filter the list to show completed items, then click its **check mark** icon. The status changes back to Incomplete and the date, time and user name are removed.

Review and Manage Checklists in the Catalog Editor

To review and manage checklists in the Catalog Editor

1. Go to **Manage Center > Learning > Catalog General Setting > Learning Modules.**
2. Locate the appropriate learning module and click to open it.
3. Click the **Session Properties** tab.
4. Click **Checklist**.
5. Filter the list to show either or both completed and incomplete checklist items by selecting an option from the Item Status drop-down list.
6. To update the status of a checklist item, select **Mark as Completed** or **Mark as Incomplete** as required from its action menu.

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.

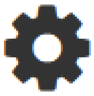
Additional Information

Create a User Targeting Template

User Targeting Templates in Data Loaders

Permissions

Action Menu



Action Menu Icon (legacy UI)

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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

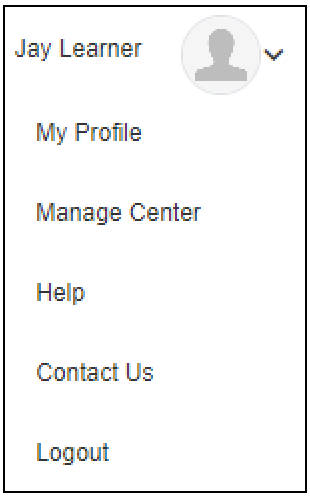
You can configure the options for drop-down list attributes.

Table: Attribute option fields

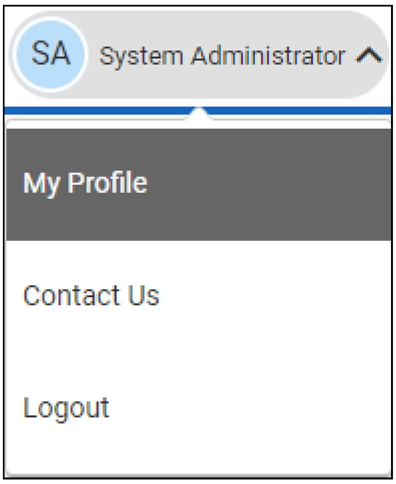
Field	Description
Code	Enter a unique identifier for the attribute's drop-down option value.
Label Key	Enter the label for the drop-down option value. This is the value shown in the drop-down where it appears in the LMS. For multi-language systems you can enter the label key that will be used to look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

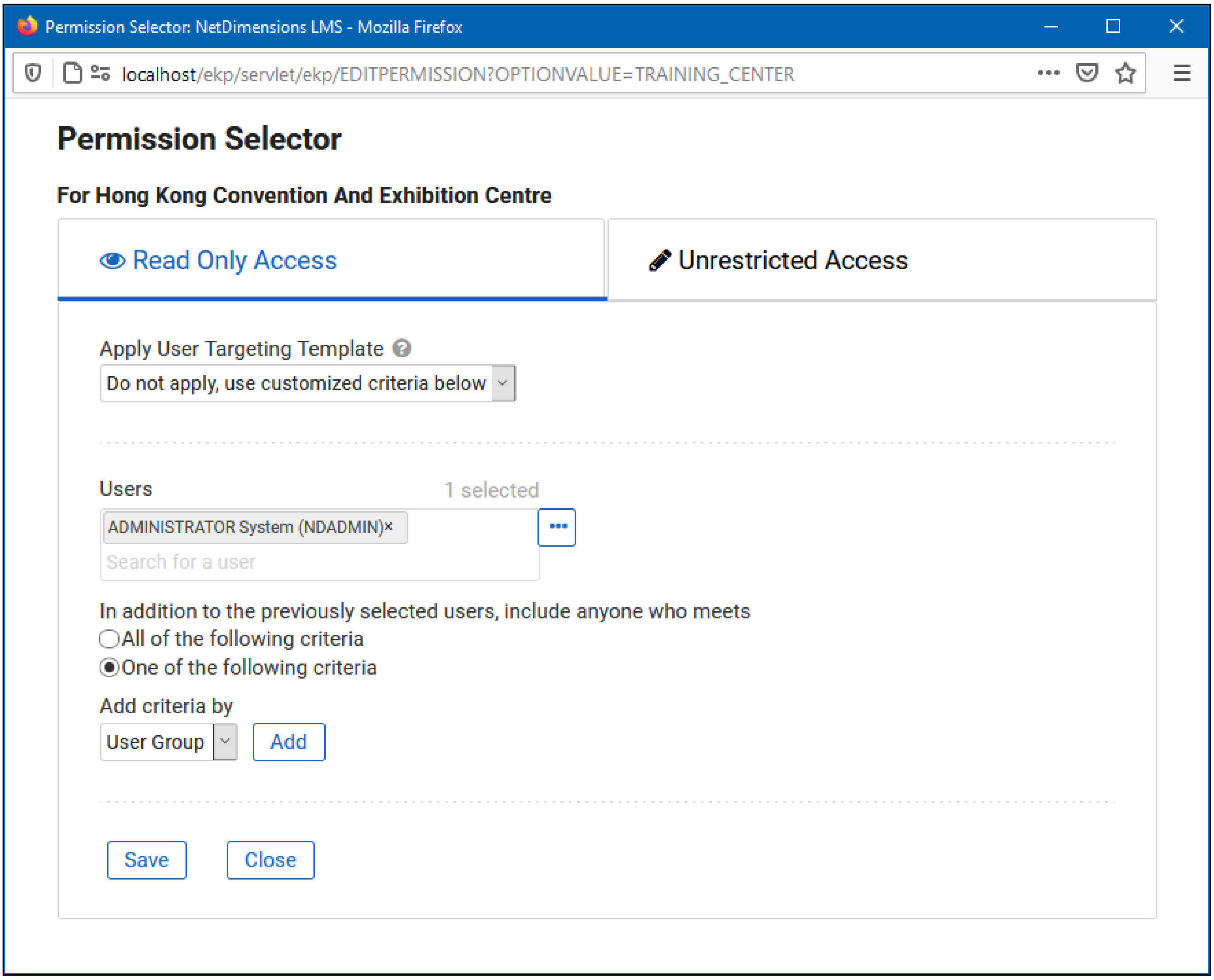


Figure: Permission Selector for Read Only Access to a Training Center

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.

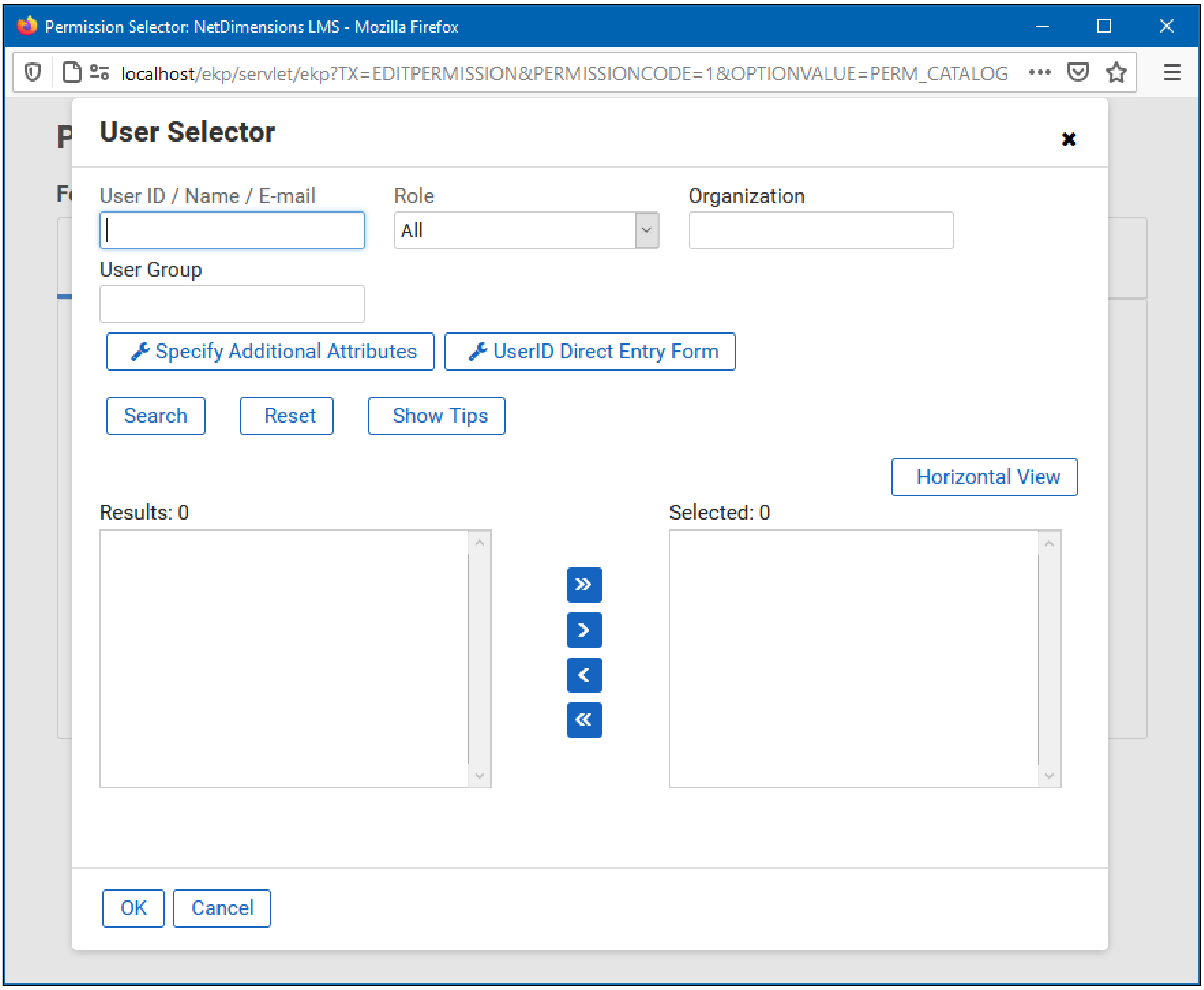


Figure: User Selector Accessed from the Permission Selector

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