

Bundles



This feature is available to Site Managers depending on system configuration. It is incompatible with systems using the auto enrolment by user group configuration.

Introduction

Bundles collect items together such as products or certifications. Bundles can simplify enrolments to content and are particularly useful for clients using eCommerce or Access Codes. Bundles may be available to one or more user groups and may be associated with [access codes](#) for easy course and group enrolments.

Common Ways to Use Bundles

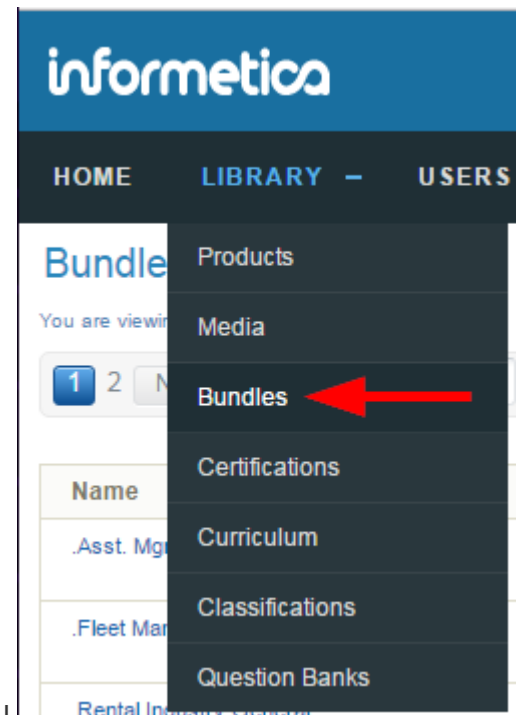
- a. Use bundles to assign products.
- b. Bundle products under one category for display on user home pages.
- c. Register users to all of the products of a similar topic or requirements for certification.
- d. Ecommerce options such as:
 - Bundle courses that are for sale in order to offer a bulk discount.
 - Offer individuals a choice between purchasing the entire bundle or separate courses.
- e. Bundle certifications together into a set of certifications or a training path.

Navigate to Bundles

This feature is available to Site Managers depending on system configuration.



1. Log in with a Site Manager account.






2. Select **Bundles** under Library in the main navigation menu.
3. A detailed list displays the Bundle Name, Description, Type, Status, and date Created and Edited. This page allows you to view, sort, filter, export, delete, and edit bundles of all types (e.g. categories and certification sets).

Example of the Bundles page.

Bundles

You are viewing: Products > Bundles

1 2 3 4 5 Next | Go to page: Go | Records per page: 25 | Records: 110

Export As:   

[List](#) [Filter](#) [Searches](#)

	Name	Description	Type	Status	Created	Edited	
+	Professional Productivity		Product Enrollment	Category	1/25/2011 1:55:18 PM	3/11/2013 9:18:40 AM	Edit ▼
+	Customer Service		Product Enrollment	Category	1/26/2011 2:23:17 PM	3/23/2011 2:34:10 PM	Edit ▼
+	Leadership		Product Enrollment	Category	1/26/2011 2:28:27 PM	7/27/2018 12:35:58 PM	Edit ▼
+	Negotiating		Product Enrollment	Category	1/26/2011 2:35:06 PM	10/20/2011 9:56:02 AM	Edit ▼
+	Presentation Skills		Product Enrollment	Category	1/26/2011 2:40:36 PM	3/25/2011 12:26:07 PM	Edit ▼

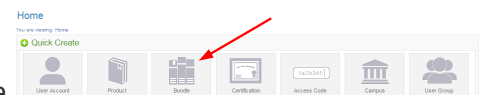
4. Optionally use [Filter and Save Searches](#) to locate specific bundles.
5. Optionally [export](#) the bundle list.

Create a Bundle



This feature is available to Site Managers depending on system configuration.

1. Log in with a Site Manager account.
2. Select **Bundle** from the Quick Create menu on the home page.
3. Fill out the **Create Bundle** form.



Create Bundle

You are viewing: Bundles > Create

Name

Description

You have 255 characters left for your description

Details
Status:

-- SELECT ONE --

Type:

Product Enrollment

Save

 or [Cancel](#)

4. Enter a bundle **Name**.
5. Add an optional **Description**.
6. Select a **Status** from the drop-down menu (active, inactive, or category).
 - Active is used when the bundle is intended for registration purposes (e.g., a bundle assigned to an access code). When active, the bundle can be seen on the desktop side and in drop-down menus for reports.
 - Inactive bundles can only be seen by Site Managers and does not appear in drop-down menus.
 - Category is used to display products together in a sub-menu within the product containers on home pages.
7. Select a **Type** from the drop-down menu. You may have only one option, such as product enrolment or certification set.
 - Product Enrolment is used to enrol individuals into all of the products assigned to the

bundle. When you want to create a category or a registration bundle, you would use this type.

- [Certification Set](#) is a custom type that allows you to bundle multiple certifications into one bigger certification. It is not an available default type, but can be customized for your system. When the user goes into the desktop side and has earned certifications that are part of a certification set bundle, they will see the certification bundle printout that lists the individual certifications instead of viewing only the single certifications.

Visit [Certification Sets](#) for more details.

8. [Add or Remove User Groups](#) to the bundle. This determines which groups have access to this bundle. Follow the steps for
9. Add the products that appear under the category. Follow the steps for [Add or Remove Bundle Products](#).
10. **Create** or **Save and Create Another**.



The user groups and products associated with a bundle do not facilitate enrolment into the groups or products. Access codes can be associated with a bundle for easy enrolment to products.

Manage Bundle Availability

You can manage bundle availability using a number of methods. Select a method below to learn more.



Adding a new product to an existing bundle will not automatically register that product to participants who have access to the bundle. The system will ask if you

want to update the registrations for all individuals who have Access Codes associated with that Bundle. Answering yes does all the work.





Add or Remove User Groups

Site Managers can change the user groups that can benefit from bundles. Individuals do not benefit from bundles until they are linked to their user groups. This includes viewing product categories.

1. [Navigate to Bundles.](#)
2. Optionally use [Filter and Save Searches](#) .
3. Select **Edit** for a specific bundle.
4. [Add or remove multiple user groups](#) .
5. **Save** when you have finished updating the user groups that are associated with this bundle.

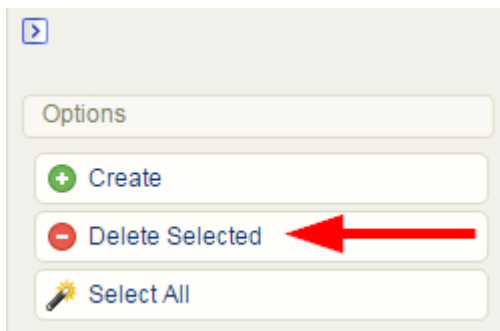
Activate or Deactivate a Bundle

1. [Navigate to Bundles.](#)
2. For the relevant bundle, use the drop-down menu to change the status to **inactive** or **active** , as appropriate.

Name	Description	Type	Status	Created	Edited	
.Asst. Mgr's Orientation	Orientation Training	Product Enrollment	active	7/6/2016 2:07:38 PM	7/6/2016 2:08:18 PM	   
			active	Sencia	Sencia	
			inactive	Administrator	Administrator	
			Category			

Delete a Bundle

1. Navigate to Bundles.
2. [Select](#) bundles.
3. Choose **Delete Selected** from the Options menu. If you can't see the menu, show the [Tool Panel](#)



4. On the confirmation prompt, select **OK**.



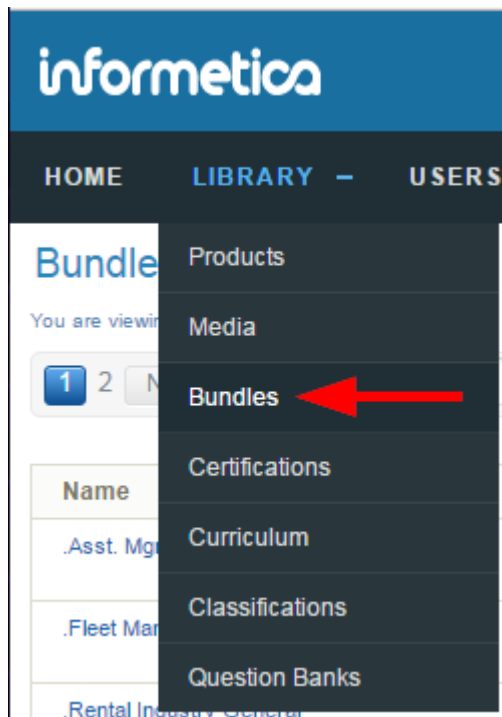
Deletion is permanent. Make sure you want to delete the bundle rather than simply inactivating it (see [Active or Deactivate a Bundle](#) above).

Edit Bundle Name/Description



This feature is available to Site Managers depending on system configuration.

1. Log in with a Site Manager account.
2. Select **Bundles** under Library in the main navigation menu.



3. For a specific bundle, select **Edit** next to Details in [detailed view](#) or select the bundle's name to open it in [list view](#) .

Administrative

Created by [Sierra Trees-Turner](#) on 3/23/2011 2:51:35 PM
Updated by [Sierra Trees-Turner](#) on 3/23/2011 2:55:34 PM

Type: Product Enrollment Storefront Delete ☐ Active

Details **Edit** User Groups (0) [Edit](#) Products (12) [Edit](#)

Description:

1. NO USER GROUPS.

1. ETHICS FOR EVERYONE
2. HELPING EMPLOYEES USE THEIR TIME WISELY
3. HOW TO LEAVE PHONE MESSAGES THAT GET RETURNED
4. PCS

4. Change the name and/or description.

Edit Details ✕

Name:

Description:

* You have 255 characters left for your description.

Save Cancel

5. **Save.**

Add or Remove Bundle Products



This feature is available to Site Managers depending on system configuration.

1. [Navigate to Bundles.](#)
2. Optionally use [Filter and Save Searches](#) .
3. Select **Edit** for a specific bundle.
4. [Add or remove multiple products](#) .
5. **Save** when you have finished updating the products that are associated with this bundle.



Adding a new product to an existing bundle will not automatically register that product to participants who have access to the bundle. The system will ask if you want to update the registrations for all individuals who have Access Codes associated with that Bundle. Answering yes does all the work.

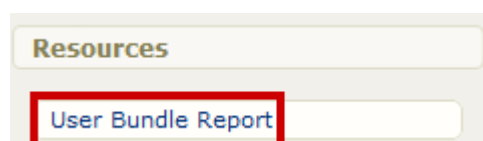
User Bundle Report


















This feature is available to Site Managers depending on system configuration.

The user bundle report shows you which bundles each user is linked to.

1. Log in with a Site Manager account.
2. Select **Bundles** under Library in the main navigation menu.
3. Select the **User Bundle Report** from the Resources menu. If you cannot see the menu, show the [Tool Panel](#).



4. You will see a list of users and their associated bundles.

Users		
You are viewing: Bundles > Users		
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z		
Name	Username/Email	Bundles
Publisher 1	notifications@informetica.com 	This is not linked to any bundles
Instructor 1	notifications@informetica.com 	This is not linked to any bundles
Manager 1	notifications@informetica.com 	This is not linked to any bundles
Manager 2	notifications@informetica.com 	This is not linked to any bundles
Manager 3	notifications@informetica.com 	This is not linked to any bundles
Manager 4	notifications@informetica.com 	This is not linked to any bundles
Manager 5	notifications@informetica.com 	This is not linked to any bundles
John Adams	notifications@informetica.com 	This is not linked to any bundles
Darrin Anderson	/danderson@sencia.ca 	This is not linked to any bundles
Amy Bateman	abateman@sencia.ca 	<ul style="list-style-type: none">• Safety• Workplace Aggression
Maria Bennet		<ul style="list-style-type: none">• Safety• Workplace Aggression
Christina Bree	cbree@sencia.ca 	<ul style="list-style-type: none">• Safety• Workplace Aggression
Sebastian Brent	sbrent@sencia.ca 	<ul style="list-style-type: none">• Safety• Workplace Aggression
Marisa Brook		<ul style="list-style-type: none">• Safety• Workplace Aggression
Jason Bruce		This is not linked to any bundles