Site Manager

Site Manager Introduction

This manual has been written as a guide for Informetica Site Managers (account type 2). It covers the aspects of the system unique to Site Manager access. Site Managers are alotted all permissions, access to all system tools, and the LMS support team. Site Manager capabilities include:

- Adjusting system settings
- Bundling courses
- Updating system labels
- Creating campuses
- Defining certification rules
- Managing report access
- Viewing system announcements
- Setting password criteria
- Viewing license details
- Running reports

Permissions Covered in Different Manuals

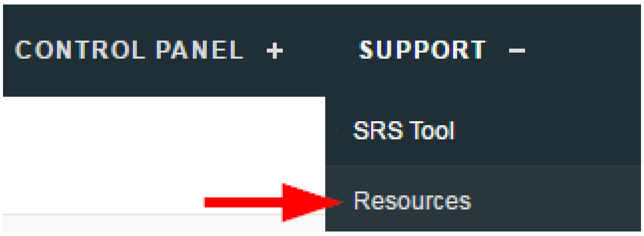
- Navigation and general desktop experience can be found in the **Participant User Manual**.
- Managing grades and scheduled courses can be found in the **Instructor User Manual**.
- Managing registration, accounts, and user groups can be found in the **Manager Manual**.
- Running reports can be found in the **Reports Manual**.
- Course creation and file/content management can be found in the **Course Author User**

Manual (coming soon).

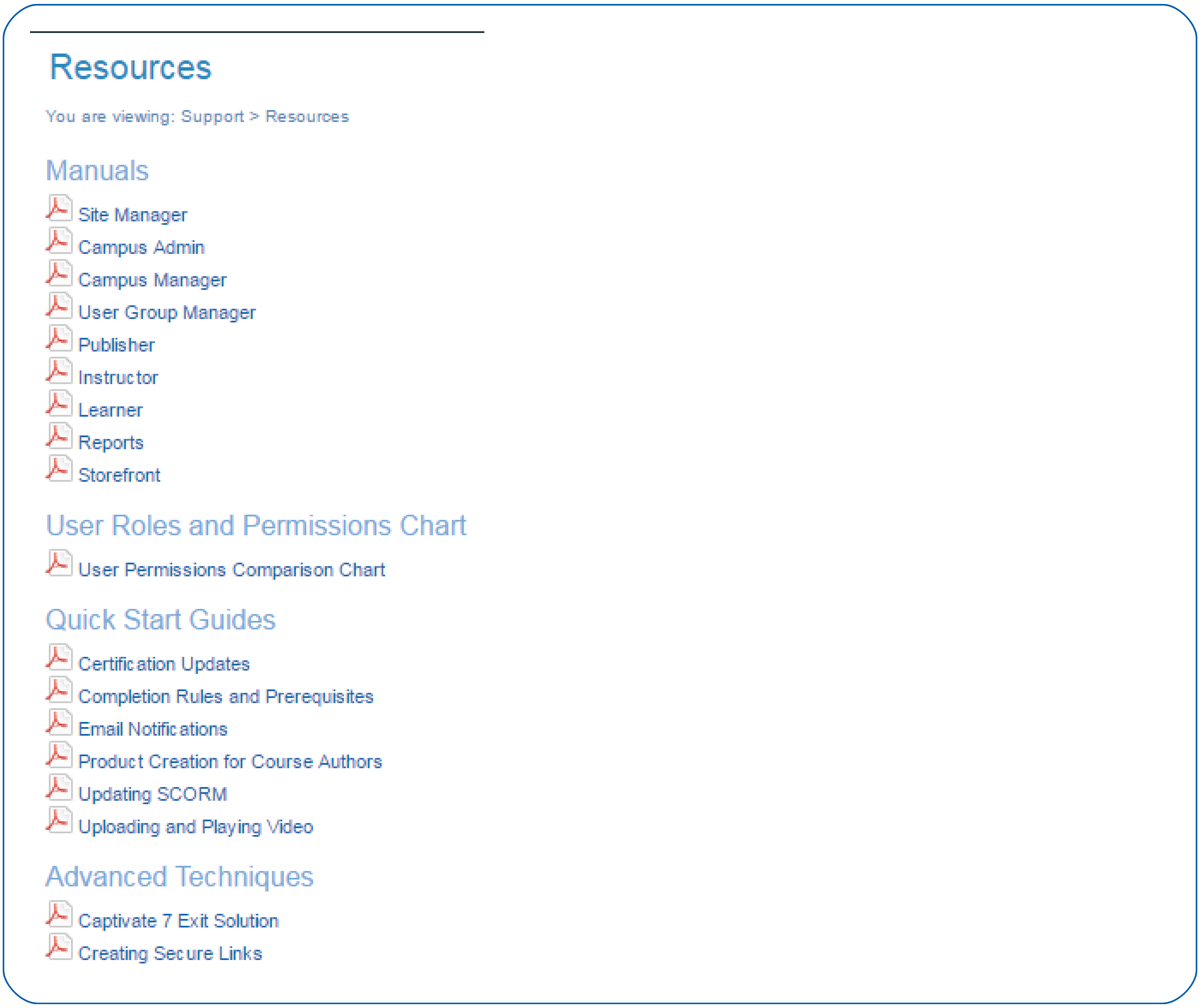
Help Documentation

In addition to this manual, Site Managers have other resources available to them within the LMS. These materials contains various help tools for using the learning management system such as user manuals and other helpful documents.

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



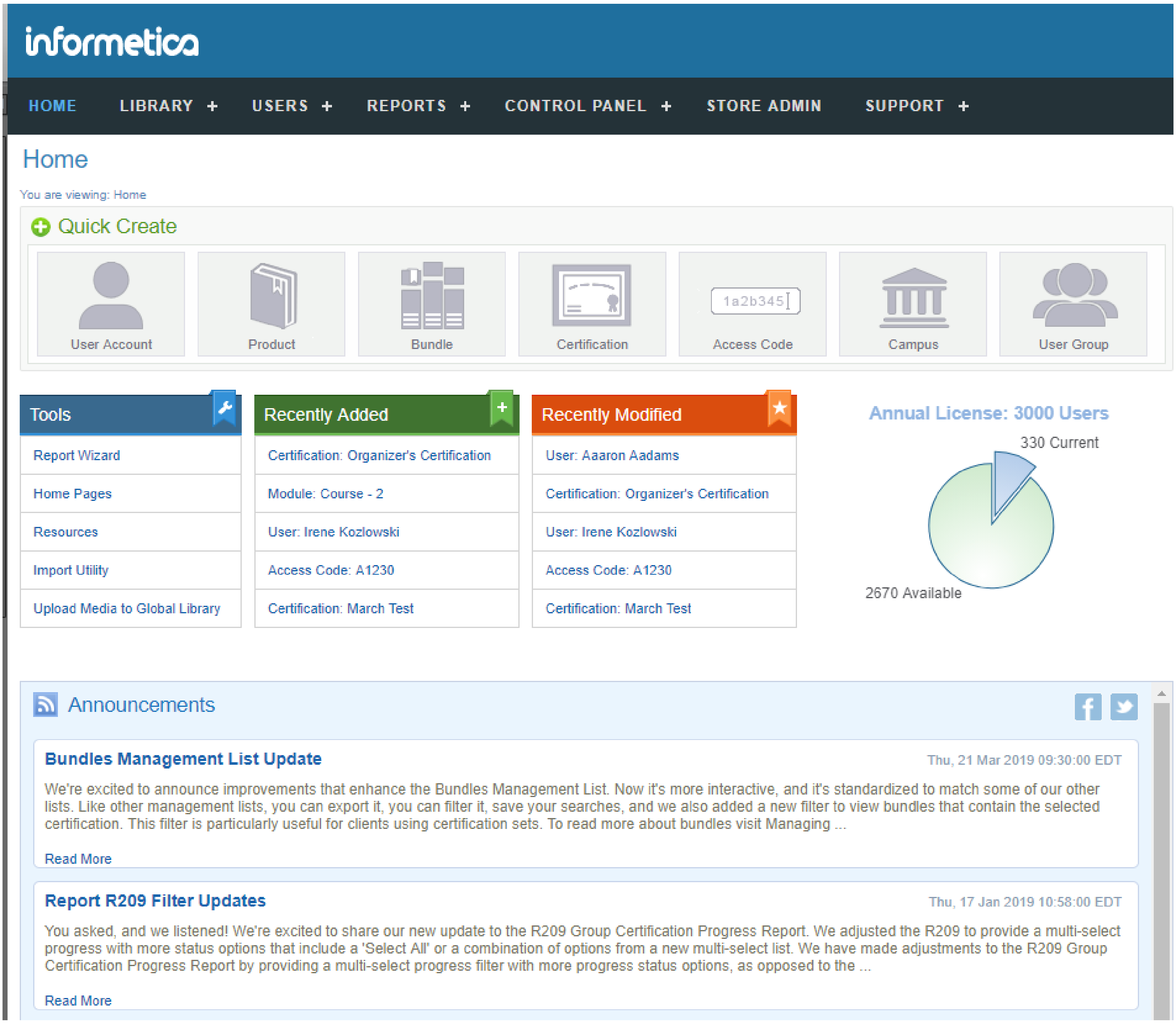
3. Select the name of any item to open that resource. There are four types of resources available:
    a. **Manuals**: These links open detailed user manuals for each user type, reports, and eCommerce Storefront.
    b. **User Roles and Permissions Chart**: This link provides the system privileges available to the different user types.
    c. **Quick Start Guides**: These are one-page documents that provide guidance on the features and functionality of specific modules and/or processes.
    d. **Advanced Techniques**: These one-page, visual job aids provide guidance on more advanced and/or technical features within the system.



This manual may reference features not configured for your system or features may be named differently due to site customizations. Informetica is under constant development and some differences between the live application and this manual may occur.

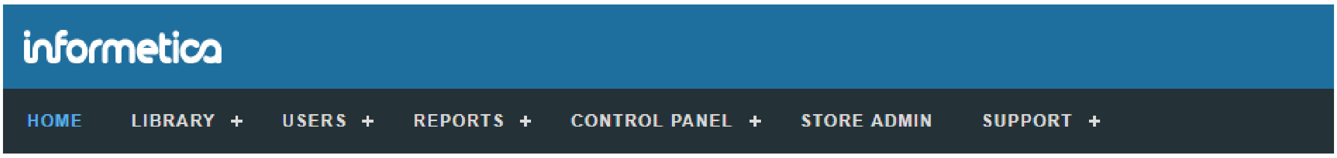
Site Manager Dashboard

The Site Manager dashboard (Home) contains shortcuts to commonly used features and tools, licensing information, announcements regarding system updates, a list of recently modified and added items, and navigation to the various areas of the system. Select an item below to learn more about an area of the Site Manager dashboard.



Main Navigation

All areas of the system available to Site Managers are accesible using the main navigation tabs. The features available under each main navigation area may vary for your system.



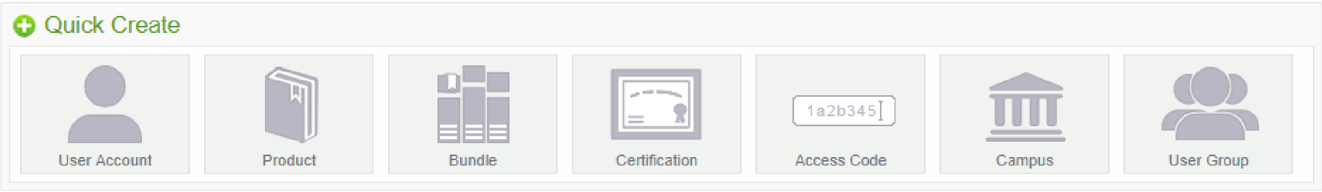
- **Home** navigates to this Site Manager dashboard.
- **Library** navigates to products, media library, bundles, certifications, classifications, scheduling tool, and question banks.
- **Users** navigates to access codes, accounts, supplemental training, notes, campuses, user groups, and site manager accounts.
- **Reports** navigates to Site Manager reports and the report wizard .
- **Control Panel** navigates to the calendar, languages, security, emails, import utility, dictionaries, product types, user xml attributes, and report access.
- **Support** navigate to the service request system (SRS tool) and resources areas.

Information Bar

The information bar displays your user login account and contains a logout link. Select **Logout** to ensure that any changes are saved and your session is properly ended.

Quick Create

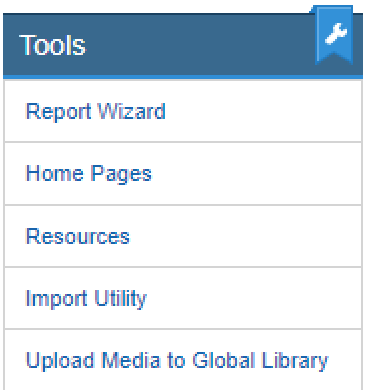
Use these links to quickly create any of the items below.



- User Account
- Product
- Bundle
- Certification
- Access Code
- Campus
- User Group

Tools

This area contains direct links to some of the most commonly used tools in the system.



Recently Added

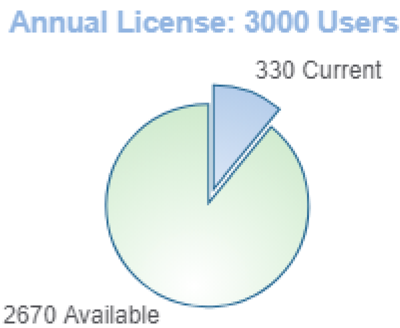
This area lists items that have recently been added to the system (e.g. products, assests, question banks).

Recently Modified

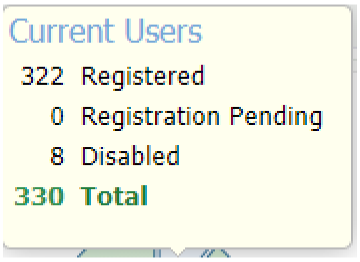
This area lists items that have recently been changed or edited within the system.

License Information

This area summarizes license information for the system. Most browsers will show a chart, but old versions of a browser may show only the data within the table.



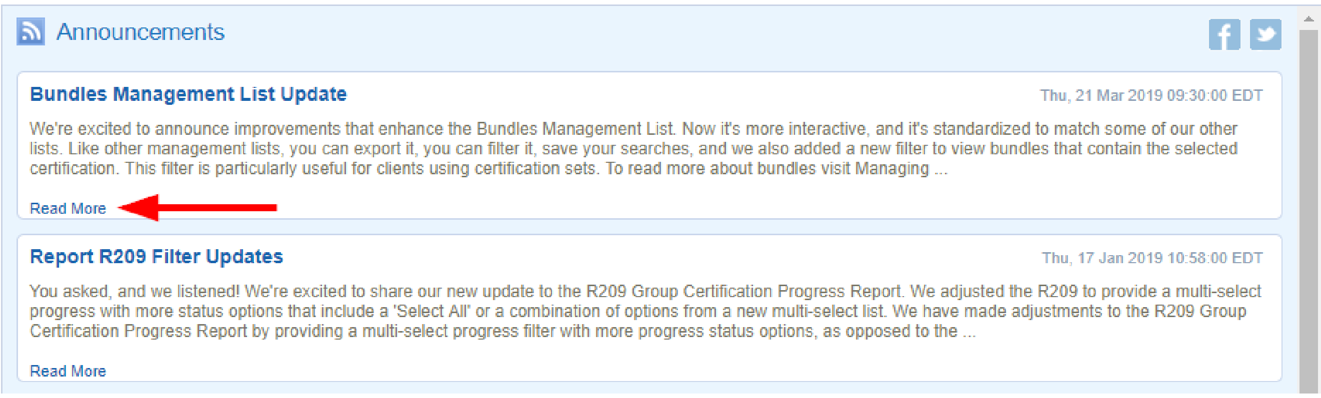
- **Current** shows the total number of desktop accounts (excluding Site Manager accounts). These accounts apply towards the license. Select the current pie slice to view a summary of the account statuses (i.e. registered, registration pending, and disabled).



- **Available** shows the number of accounts available.

Announcements

This area shares information about the lerning management system such as new modules, development, and improvements. New announcments have an indicator.**Select Read More** to view the entire annoucment.



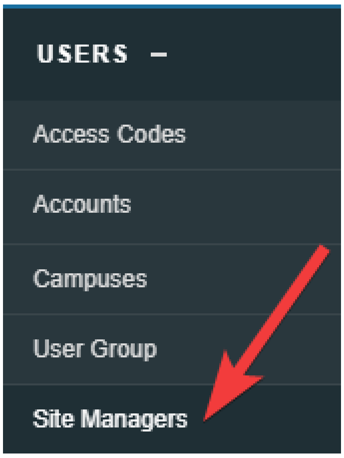
Manage Site Manager Accounts

This feature is available to Site Managers.

A Site Manager account may create additional Site Manager accounts in the system. Every account in the system requires a unique username and password. This is important for Site Managers that may have additional account types in the system, especially for systems that use email addresses as usernames.

Navigate to Site Managers Page

1. Log in with a Site Manager account.
2. Select Site Managers at the end of the Users menu.



Create Site Manager Account

1. Navigate to the Site Managers page .
2. Select **Create Site Manager** from the Tools menu. If you cannot see the menu, show the Tool Panel .
3. Enter the first name, last name, username, password, and password confirmation.

4. **Save**.

Disable Site Manager Account

It is important to disable a Site Manager's account when the account is no longer required (e.g., an employee has quit or the user no longer needs Site Manager level permissions).

1. Navigate to the Site Managers page .
2. Select Edit to the right of a Site Manager account.
3. Use the Status drop-down to change the status to Disabled.
4. **Save**.

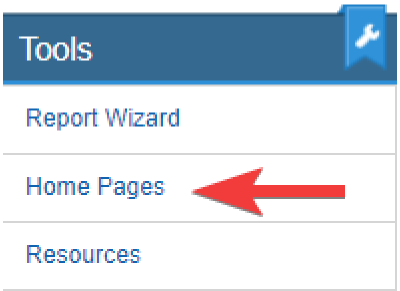
Home Pages

This feature is available to Site Managers.

Home pages give easy access to course content and other information users need. They can also be used to communicate important information, like news or announcements. Site managers can create home pages to provide a custom user experience in the LMS. You can have a unique home page for each user group or share home pages among groups. A default home page is displayed for all user groups not otherwise assigned to a specific home page. A user group can only belong to one home page, but users may belong to multiple users groups and have access to multiple home pages. Users with multiple home pages may change their home page using the drop-down on the home page.

Navigate to Home Pages

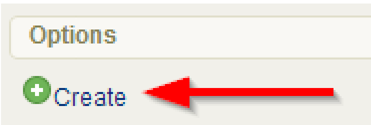
1. Log in with a Site Manager account.
2. Select **Home Pages** from the Tools menu on your home page.



Create a Home Page

Site Managers can create new home pages to display to selected user groups.

1. Navigate to Home Pages .
2. Select **Create** from the Options menu. If you cannot see the menu, show the Tool Panel .



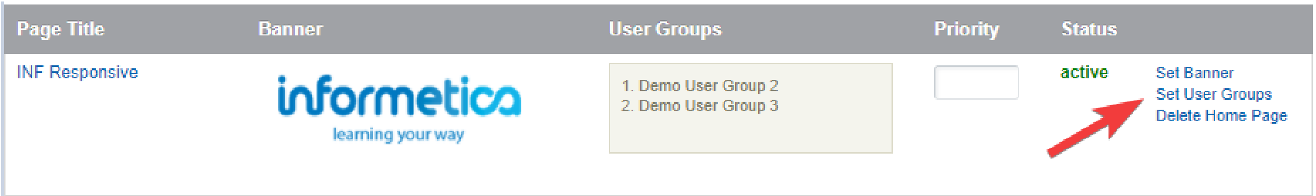
3. Design your page using the content editor

   .
4. **Save**.
5. Optionally assign user groups (see Add or Remove Home Page User Groups) or opt to keep all groups in the default home page.
6. Brand the home page with a logo by setting a banner .
7. Optionally set a page priority .

Add or Remove Home Page User Groups

Site Managers can control which home page is visible to the user groups in the system.

1. Navigate to Home Pages .
2. Select **Set User Groups** to the right of the home page.



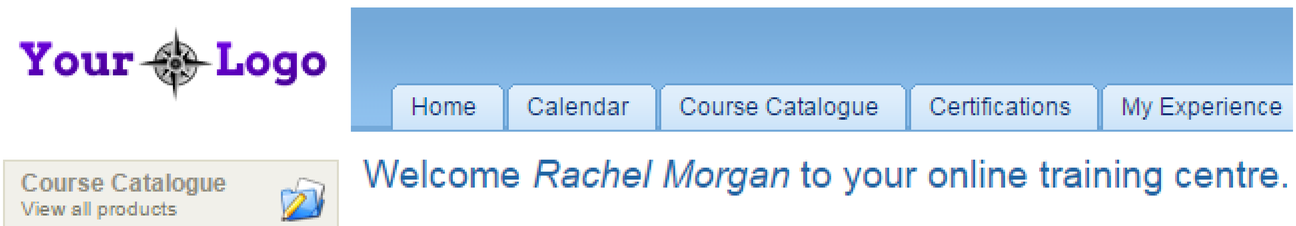
3. Add or remove groups

   .

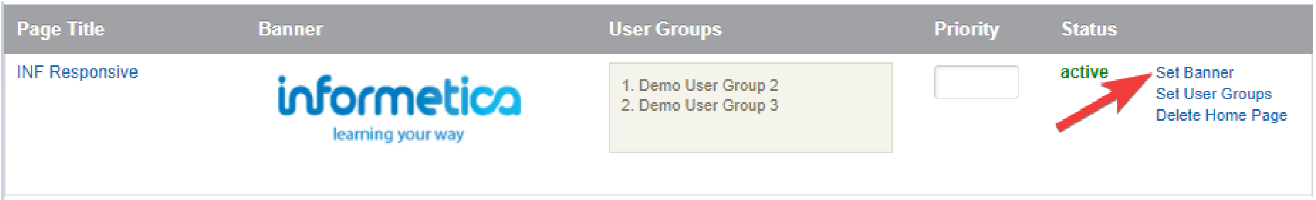
4. **Save.**

Set Home Page Banner

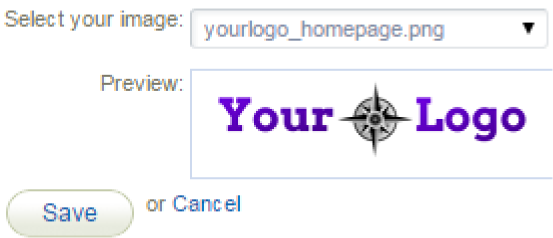
Site Managers can brand home pages by adding a banner (e.g. a company logo). Banners are configured for an ideal width of 160px and height of 78px. If you select an image that exceeds the maximum restrictions, the system will resize accordingly. Resized images are saved as a new file with the text "_banner" appended to their original name. The banner will appear on the home page, as seen below:



1. Navigate to Home Pages .
2. Select **Set Banner** to the right of the home page.



3. Select an image from the dropdown menu. You may select an image already uploaded to the Media Library or upload it from the Edit Home Page screen.

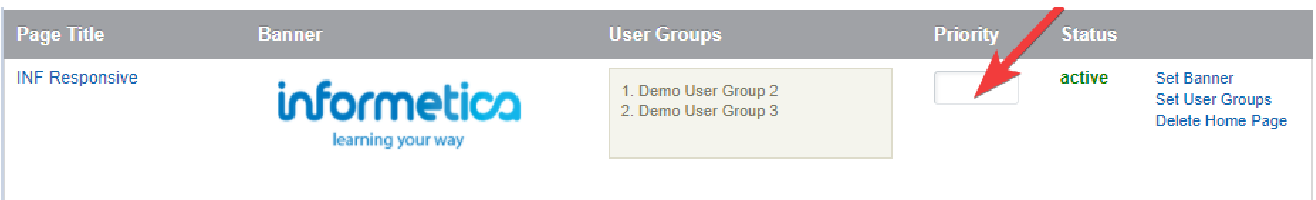


4. **Save**.

Home Page Priority

Site Managers can enter or change the priority value of each home page. Priorities are useful in cases where users have access to multiple home pages. The higher the priority value, the more likely that home page is to be displayed first when the user logs in.

1. Navigate to Home Pages .
2. In the Priority field, enter a number from 1 - 100.



3. **Save**.

Priorities can only be added to home pages that have user groups asssigned.

Home Page Availability

Site Managers can manage home page availability using several methods. Select a method below to learn more.

Add or Remove User Groups

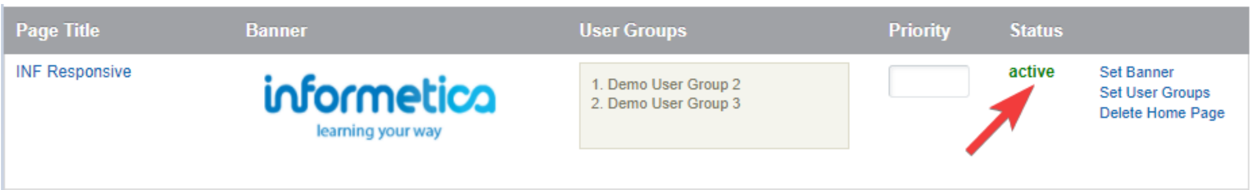
See Add or Remove Home Page User Groups .

Change Status to Active or Inactive

Change the status of home pages. An inactive home page remains in the system but can no longer be seen by users.

Users are impacted when a home page is made inactive. It is best practise to reassign user groups from an inactive home page.

1. Navigate to Home Pages .
2. Select the page Status to toggle it to active or inactive.

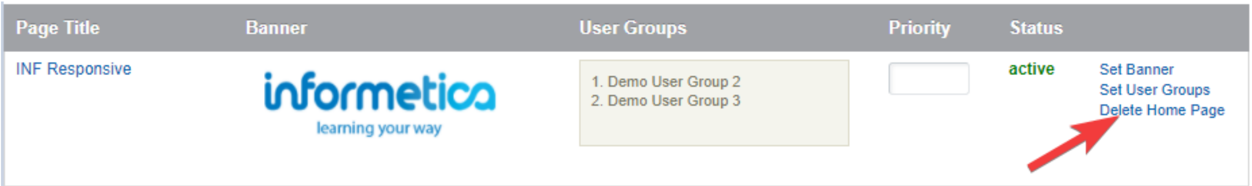


Delete a Home Page

User groups that belonged to a deleted page will be added to the Default Home Page. Note that the default home page cannot be deleted.

Deleted home pages are permanently removed from the system.

1. Navigate to Home Pages .
2. Select the **Delete Home Page** link to the right of the home page.



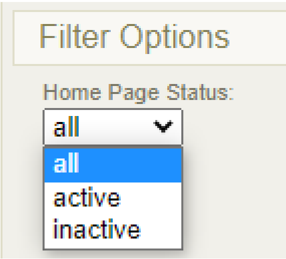
3. Select **Yes** when prompted to confirm.

Edit Home Pages

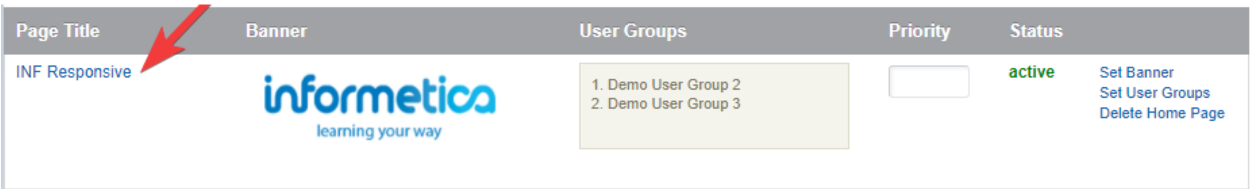
This feature is available to Site Managers and Course Authors , depending on system configuration.

Edit with Site Manager Account

1. Navigate to Home Pages .
2. Optionally filter to show only active or inactive home pages. If you can't see the filter options, show the Tool Panel .



3. Select the name of the home page to open the content editor .



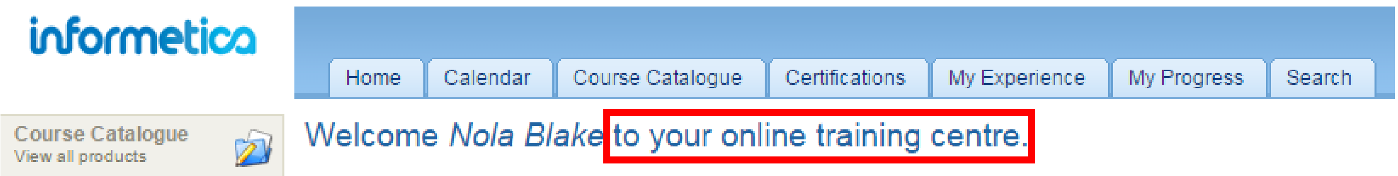
4.
5. Use the content editor to make desired changes.
6. **Save**.

Edit with Course Author Account

1. Log in and select **Edit** button at the top of the page.
2. Use the drop down menu to select a home page if you belong to multiple pages.
3. Use the content editor to make desired changes.

Change the Home Page Welcome Message

When a user enters the system, there is a welcome message at the top of their page. Site Managers can customize this message using a dictionary label. The user's name is automatically populated.



1. Navigate to Dictionaries.

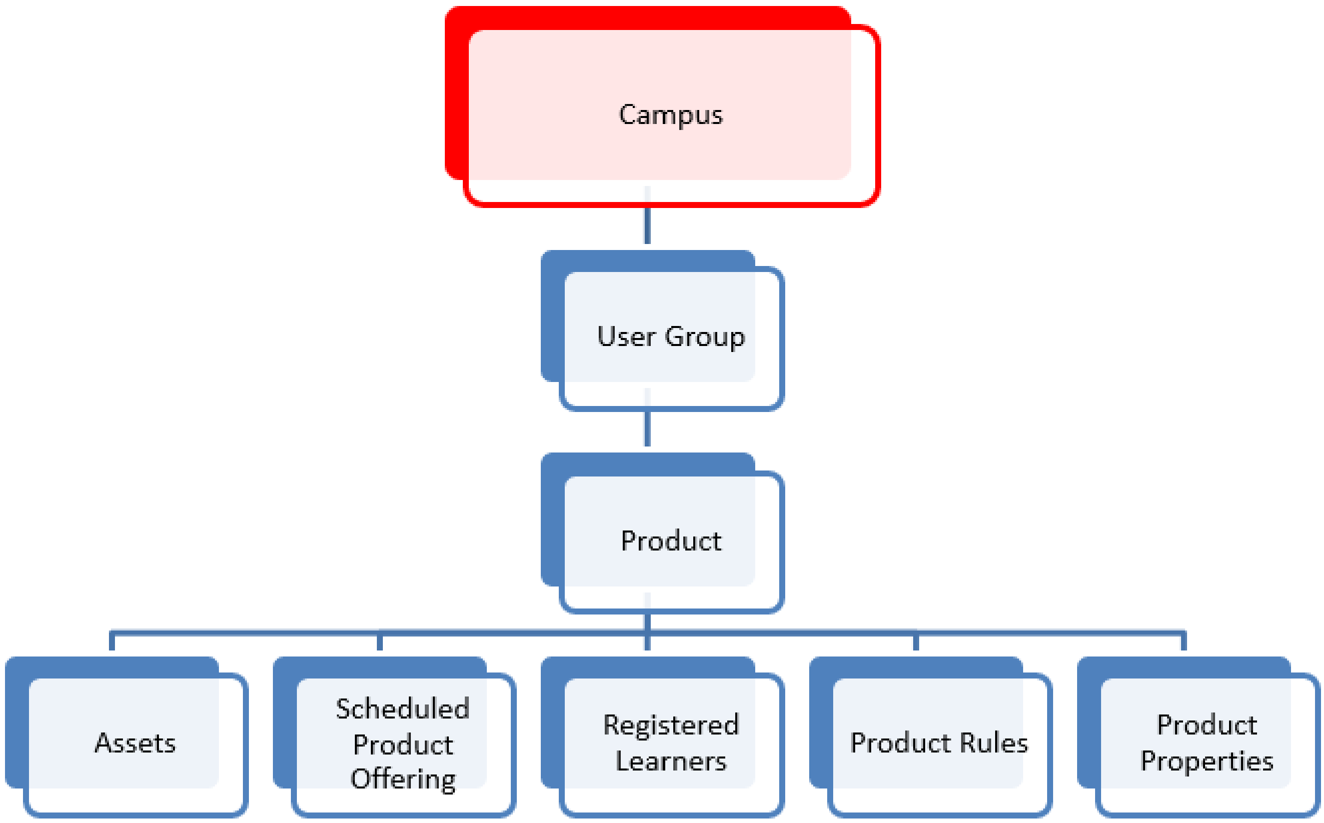
2. Follow the steps in Edit Dictionaries .
3. Enter new text for the label: word_welcome (seen in the image above as "Welcome").
4. Enter new text for the label: welcome_message (seen in the omage above as "to your online training centre."
5. **Save**.

Campuses/Organizations

The cornerstone of Informetica's hierarchy is the campus (also known as an organization). A campus is a common space in which products (e.g. courses), learning activities, and learners coexist. Each campus can meet differing needs of user audiences entering the learning management system, such as a unique course library. Campuses are also essential for segregating report functions. Site Managers may opt to delegate the management of content, users, and reports to a campus manager giving the campus some or full independence.

Examples of campus environments:

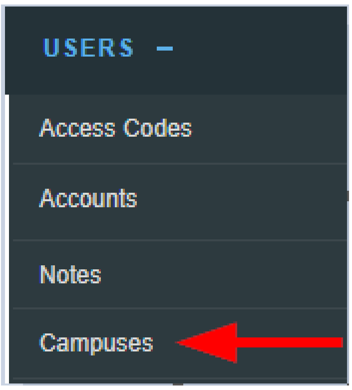
- Regions or Locations
- Companies or Associations
- Departments or Divisions
- Work Areas



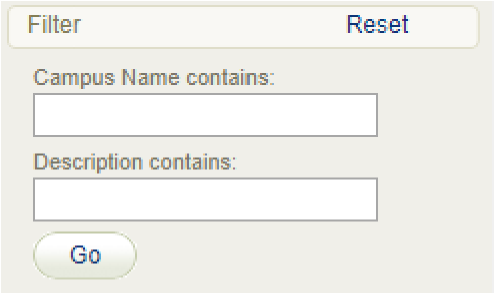
The hierarchy of a campus in relation to other structural components of the system.

Navigate to Campus Page

1. Log in with a Site Manager account.
2. Select Campuses from the Users tab.



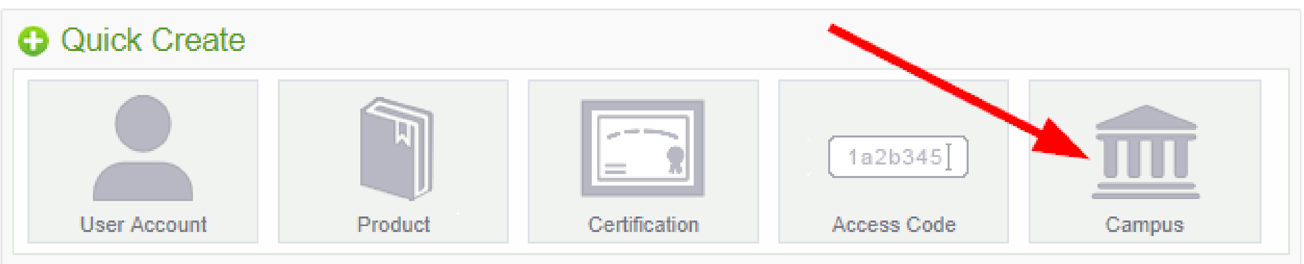
3. Optionally use the Filter menu to help you find a campus by typing a simple search term contained in the campus name or description and then select **Go** at the bottom of the filter. If you can't see the menu, show the Tool Panel .



4. Use the Sort Options menu on the right hand side to sort the campus list. Campuses are sorted alphabetically by default. The following sort options are available in ascending or descending order:
    - Alphabetically by name
    - Alphabetically by description
    - Chonologically by create date
    - Chronologically by modified date
5. Choose the reset link at the top of the filter options menu to remove any filters.

Create a Campus

1. Log in with a Site Manager account.
2. Select **Campus** from the home page under the Quick Create menu.



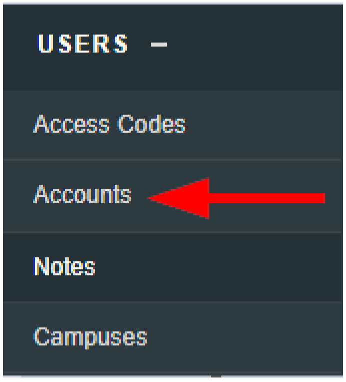
3. Complete the form.
    a. Enter the name for the campus.
    b. Select available dictionaries from the drop-down menus as the default languages for this campus.
    c. Enter an optional description. The description is not publicly displayed.

d. **Save** to create the new campus or **Cancel** to navigate to the campuses page without saving the changes.

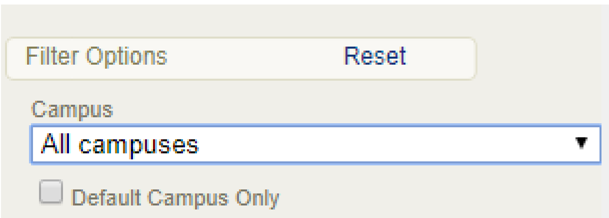
4. Assign user groups (see Add or Remove Campus User Groups).
5. Set up optional email notifications (see Add Campus Emails).

View Campus Users

1. Log in with a Site Manager account.
2. Select Accounts from the Users tab.

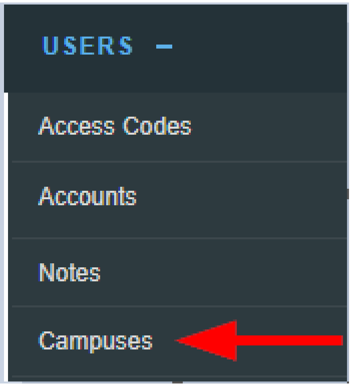


3. Use the filters to select a campus. If you cannot see the menu, show the Tool Panel .

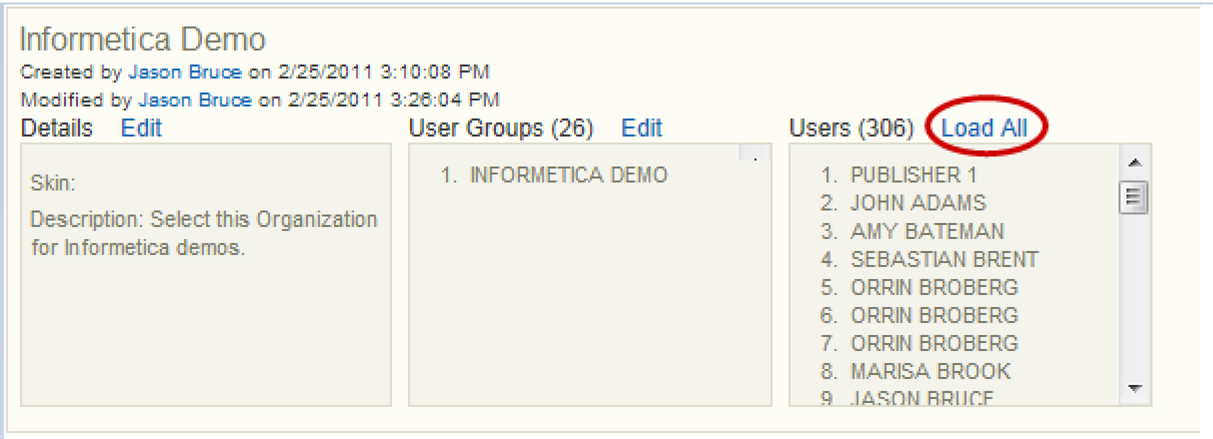


Alternate Method

1. Select Campuses from the Users tab.

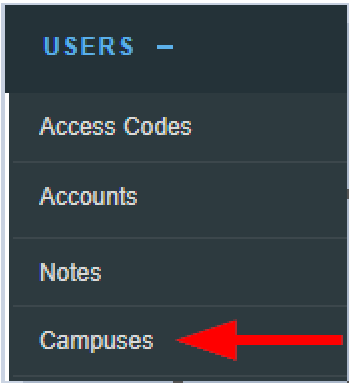


2. Make sure you are in detailed view . When in detailed view, you can see a list of users belonging to the campus. The system shows only 100 users, ensuring that the page will load quickly. This is particularly helpful for clients that have hundreds of thousands of users. Select Load All to view more than 100 users.



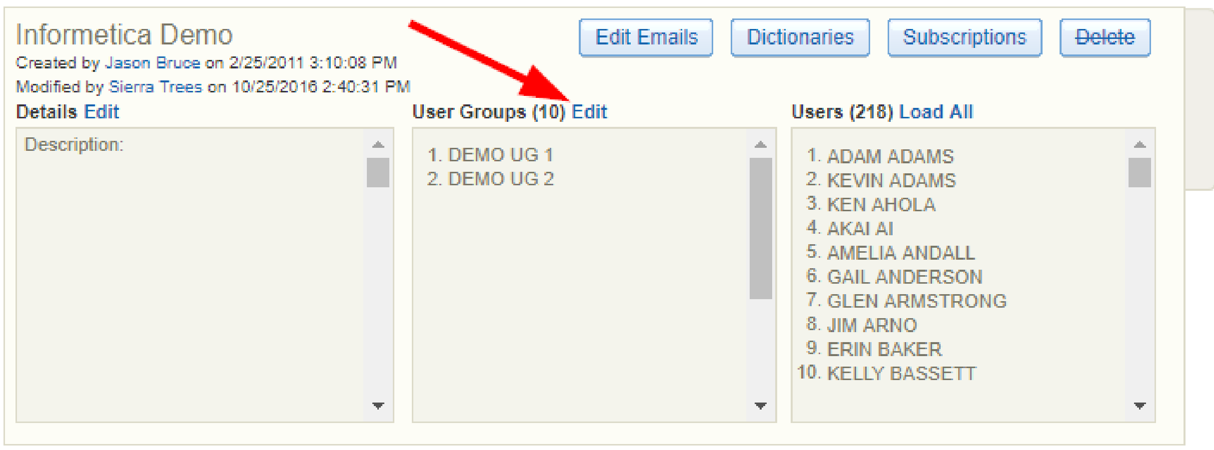
Add or Remove Campus User Groups

1. Log in with a Site Manager account.
2. Select Campuses from the Users tab.



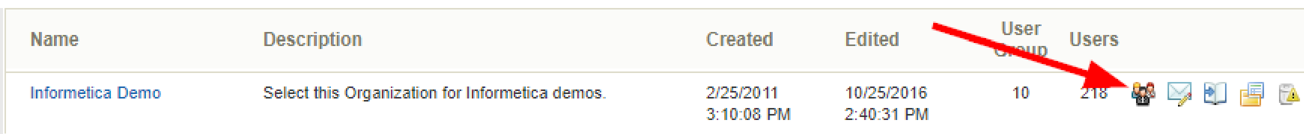
3. Select the Edit link or User Groups icon.

Edit user groups link from detailed view .



Edit user groups icon from list view

.

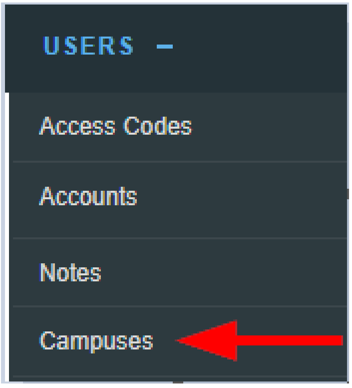


4. **Save** to complete the changes or **Cancel** to navigate to the campuses page without saving.

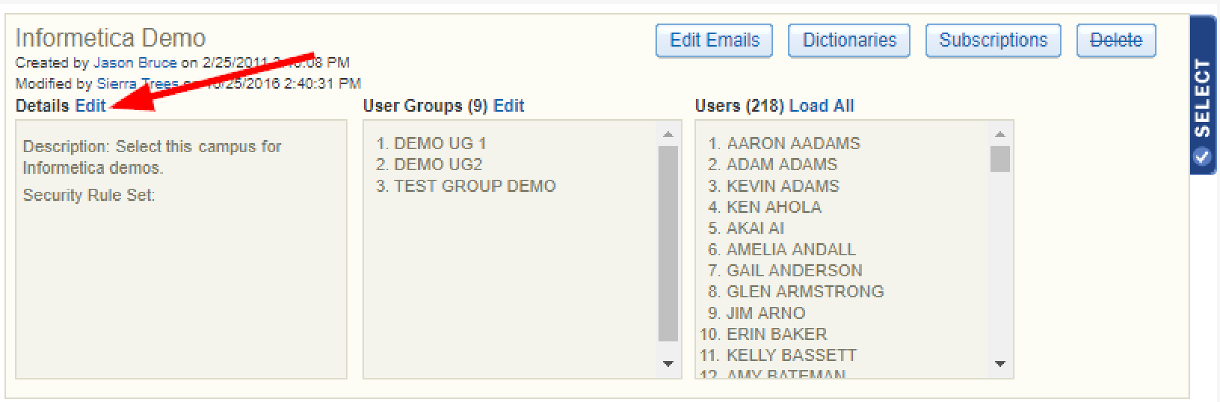
Change Campus Name or Description

1. Log in with a Site Manager account.

2. Select Campuses from the Users tab in the main navigation menu.

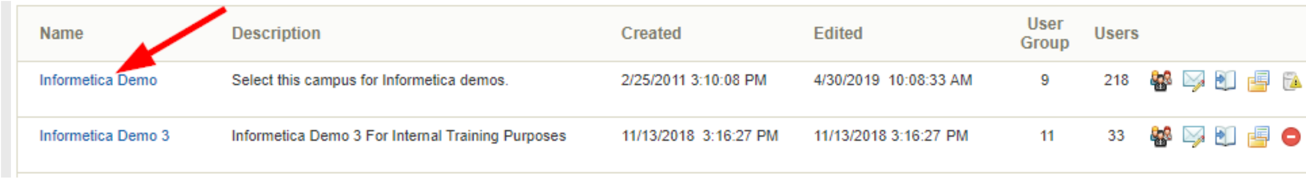


3. Select the **Details Edit** link or the select the name of the campus.

> Edit name or description from detailed view.
>
> 
>

> Edit name or description from list view

> .



Name	Description	Created	Edited	User Group	Users
Informetica Demo	Select this campus for Informetica demos.	2/25/2011 3:10:08 PM	4/30/2019 10:08:33 AM	9	218
Informetica Demo 3	Informetica Demo 3 For Internal Training Purposes	11/13/2018 3:16:27 PM	11/13/2018 3:16:27 PM	11	33

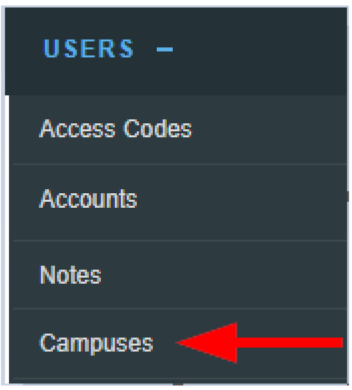
4. **Save** to complete athe changes or **Cancel** to navigate to the campuses page without saving.

Delete a Campus

A deleted campus is permanently removed from the system. Deleting a campus removes associated campus emails as well.

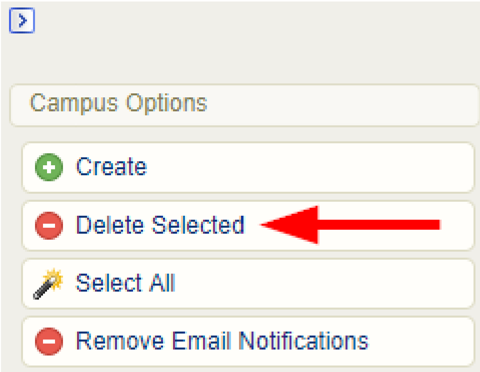
The system prompts you if you cannot delete a campus and lists the associated elements preventing the deletion. You must first reassign any associated elements such as users and user groups. This prevents creating disassociated elements in the system, which can have serious affects on users.

1. Log in with a Site Manager account.
2. Select Campuses from the Users tab.



3. Select one or more campuses by clicking within the selection box(s).
4. Choose **Delete Selected** from the Campus Option menu. If you cannot see the menu, show the

Tool Panel .



Migrate User Groups

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

This tool is used for migrating user groups from one campus to another while maintaining relationships between campuses, user groups, access codes, classifications, and users. To navigate to the Migrate User Groups tool, log in as a site manager and then select the users tab, then users, and finally the migrate link under the Tools menu. The wizard guides you through the steps and options for moving the users in migrated groups. Your current step is highlighted and you can navigate through the steps by selecting a tab at the top.

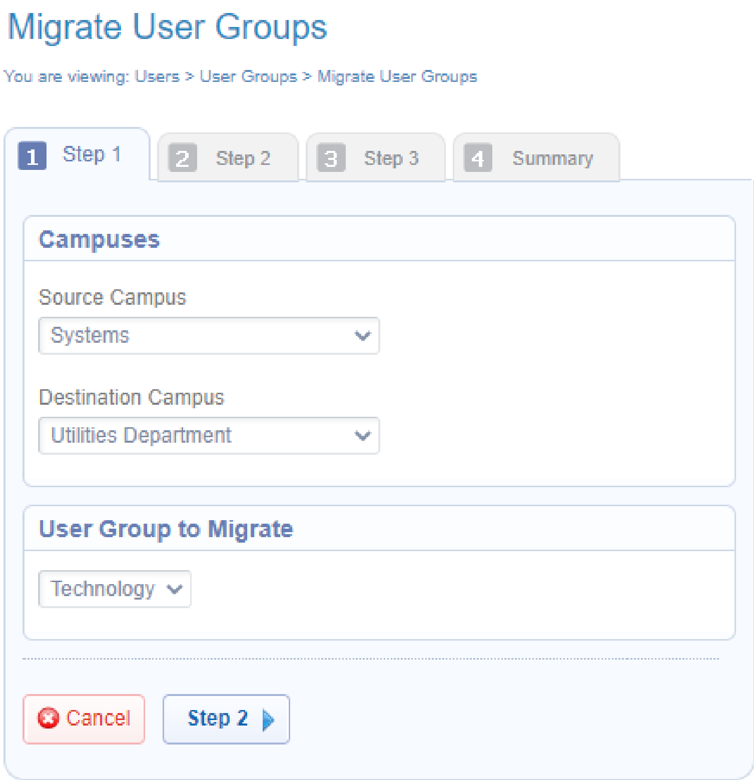
1. Log in with a Site Manager account.
2. Select User Groups from the Users main navigation.
3. Select **Migrate** from the Tools menu to open the User Group Migration wizard. If you can't see the menu, show the Tool Panel .

4. Wizard Step 1: Select campuses and user group. Use the drop-down menus to:

    a. Choose the source campus. This is where the user group currently resides.

    b. Choose the destination campus. This is where the user group will move.

    c. Choose the user group to migrate.



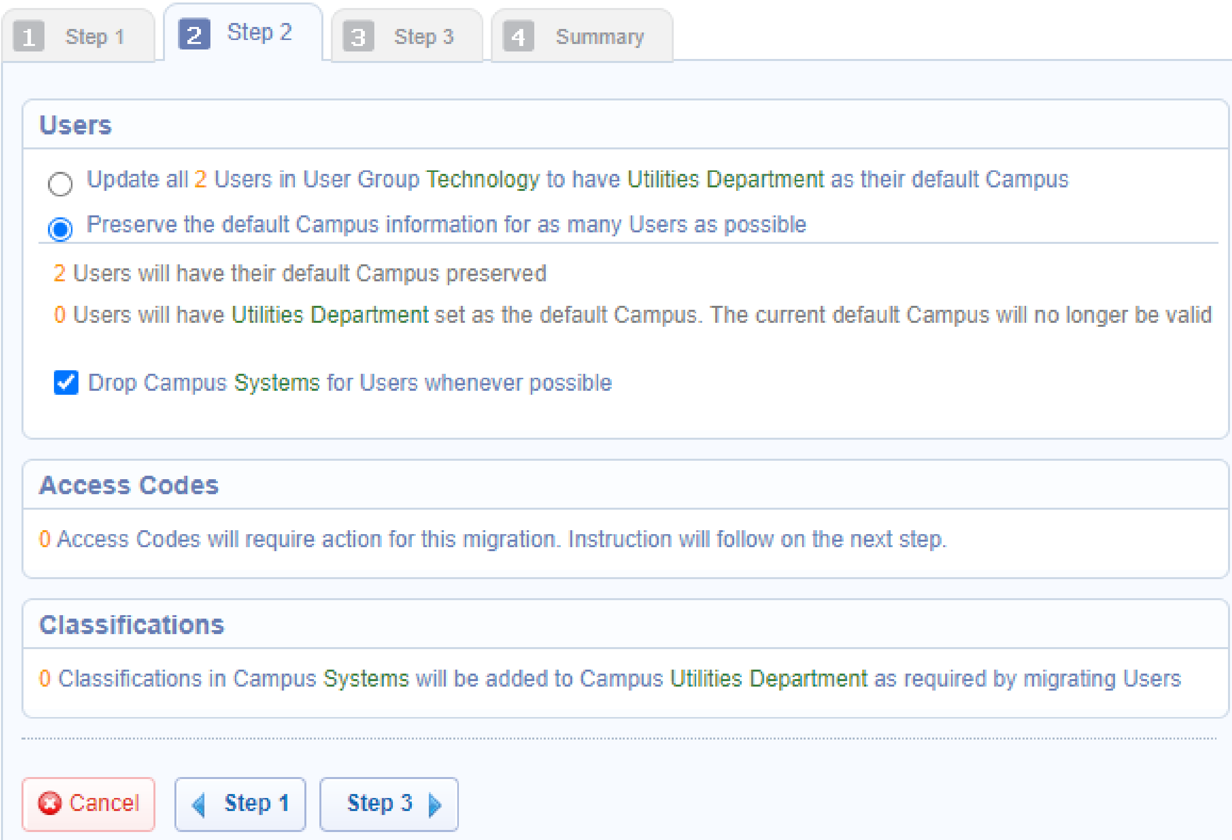
5. Wizard Step 2: Decide on default campus. You have two choices: update or preserve the default campus.

> Changing the default campus can affect system relationships. Use caution when changing the default campus, especially if your system uses single-sign-on (SSO) or has an integration with a 3rd party system. Changing the default campus can affect system relationships and determine which theme (skin) is applied and which language and email alerts an account sees.

    a. Update the default campus. When you move the user group to a different campus, you might also want to update the default campus. The tool will check for users registered into that user group and if so, you can update their default organization as well.

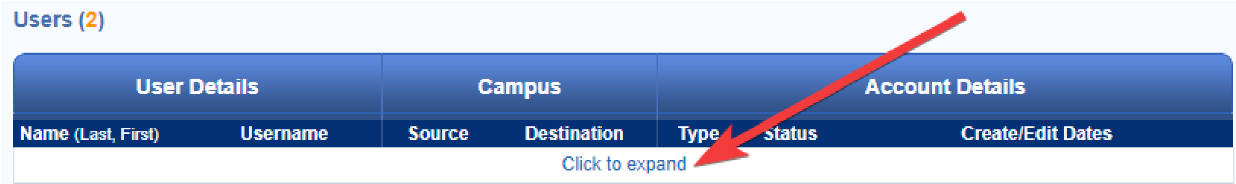
b. Preserve the default campus. Users may belong to multiple user groups and even though you are migrating one of them, you can opt to preserve their existing user group / default campus relationship. You also have the option to remove the source campus from the user accounts whenever possible by selecting the check box for Drop Campus.

c. This step will also identify any access codes or classifications that will be affected.



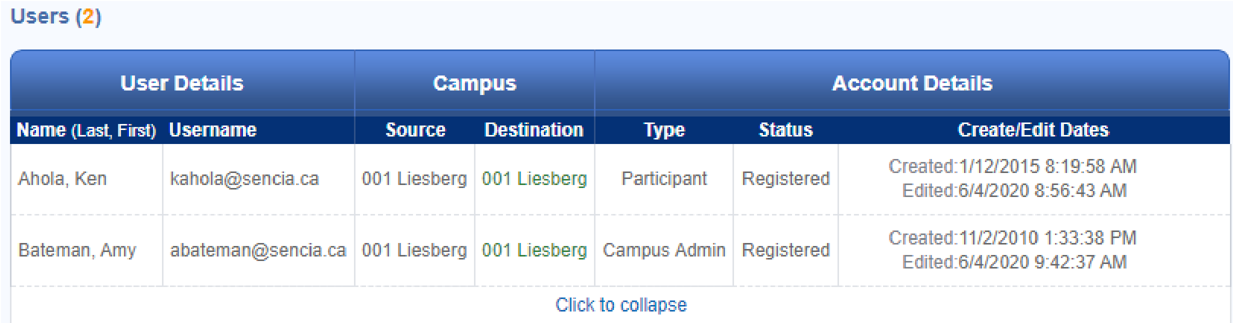
6. Step 3: Review changes to users' default organizations.

- Expand the users to review changes.



Users (2)

User Details		Campus		Account Details		
Name (Last, First)	Username	Source	Destination	Type	Status	Create/Edit Dates
Click to expand						



Users (2)

User Details		Campus		Account Details		
Name (Last, First)	Username	Source	Destination	Type	Status	Create/Edit Dates
Ahola, Ken	kahola@sencia.ca	001 Liesberg	001 Liesberg	Participant	Registered	Created:1/12/2015 8:19:58 AM Edited:6/4/2020 8:56:43 AM
Bateman, Amy	abateman@sencia.ca	001 Liesberg	001 Liesberg	Campus Admin	Registered	Created:11/2/2010 1:33:38 PM Edited:6/4/2020 9:42:37 AM
Click to collapse						

- Systems that use access codes must choose all the access codes that must be migrated.
- Systems that use classifications must choose any classifications that must be migrated.
- Select **Submit** at the bottom of the poage when ready to compelte the migration.

7. Step 4: Summary and confirmation of changes. The migration is complete and you will see a summary of what has been changed. A log of the changes is available in CSV file format.

Certifications

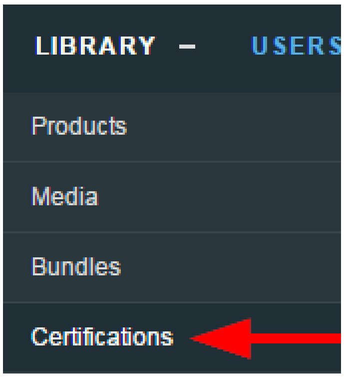
A certification corresponds to one or more courses and components that an individual must complete in order to receive completion acknowledgment or accreditation.

The LMS uses PDF format for its certifications. Certification templates can be created on your behalf as a part of the onboarding process, and our team can help with small changes to the designed certification template should you need them.

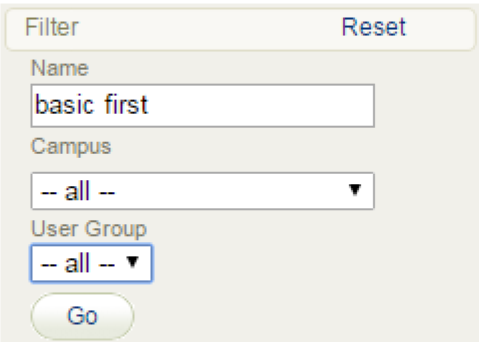
Site Managers can create rules for certifications that can be earned automatically once the rules are satisfied. Certifications can be based on course completion and test results and you can set expiry dates, assign user groups, and even create your own customized certificates for participants to print out. A default template is provided for certification printouts.

Navigate to Certifications

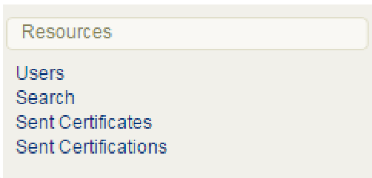
1. Log in with a Site Manager account.
2. Select **Certifications** under Library in the main navigation menu.



3. Optionally use the filters in the Filter menu to narrow your selection, and then select **Go**. If you cannot see the menu, show the Tool Panel .



4. Optionally use the Resources menu for additional options to view and interact with certifications. If you cannot see the menu, show the Tool Panel .



   a. Select **Users** to view a list of all individuals who have earned certificates. Filter user list by user group or certification name.
   b. Select **Search** to list certifications and display search results by name and user group.
   c. Select **Sent Certificates** if your organization sends out physical certifications, use this tool to view a list of eligible individuals, and mark certifications that have been sent, and see which certifications have already been sent.

d. Select **Sent Certifications** to mark user certifications that have been sent, as well as view a list of eligible and already sent certifications.

Create a Certification

Site Managers can create rules for certifications that can be earned automatically once the rules are satisfied.

Important Things to Keep in Mind when Creating Certifications

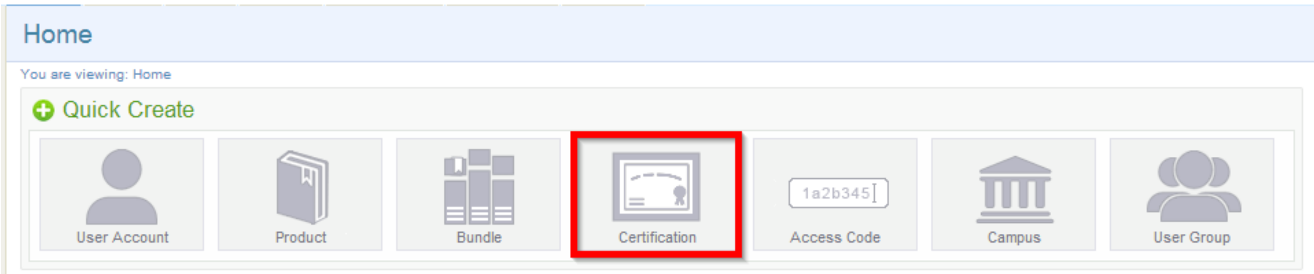
A. Certification rules cannot be edited once they are saved. This is to prevent affecting the qualification of any participants - current and past. If a certification has changed, you can create a new certification with the updated rules and then deactivate the certification previously used.
B. Only individuals that belong to the user groups associated with the certification are eligible to obtain the certification, even if they have satisfied all requirements. Conversely, individuals in the same groups will see certification progress on their transcript/certifications page, even if they are not enrolled in products/assets defined in the Certification Rules.
C. Inactive earned certifications cannot be earned.
D. Updating SCORM content does not update existing certifications. You will require a new certification to include the revised SCORM package.

E. Assets added to a product after a certification was created will require a new certification to include the asset.
F. Associate imported certifications to an asset that won't grant the certification unintentionally through other methods, such as an asset that is automatically graded or associated with another certification. Some clients use dedicated, inactive assets for this very reason.

View video tutorial: How to Create Certifications

View video tutorial: Creating Complex Certifications

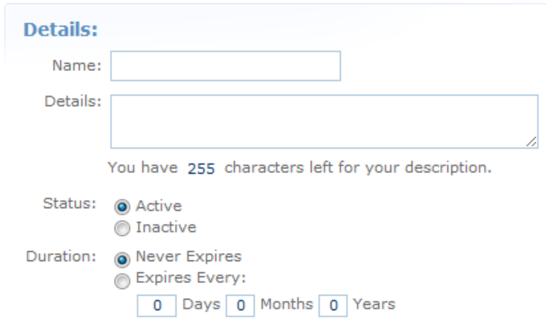
1. Log in with a Site Manager account.
2. Select **Certification** from the Quick Create area of your home page.



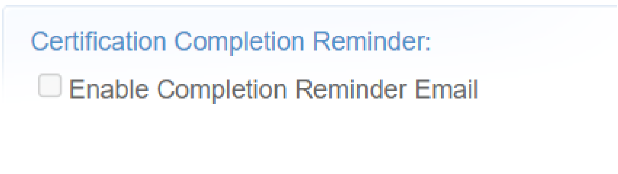
3. Enter a **Name** for the certification.
4. Optionally add **Details** about the certification. These details are viewable only by other Site Managers.
5. Select whether this certification is **Active** or **Inactive**. Individuals can only earn active

certifications.

6. Define the **Duration** that the certification is valid. The default setting, Never Expires, means that the certification is valid until it is made inactive or removed. You can also opt to define when the certification expires by using the **Expires Every** field. Certifications that expire do so based on the date that the user earned the certification.



7. Optionally select the **Enable Completion Reminder Email**. If you have a duration/expiry set for the certification, you can opt to send a reminder email to users. The toggle is only selectable when the duration is entered. Note that your site must have the Completion Reminder Email enabled to use this feature.

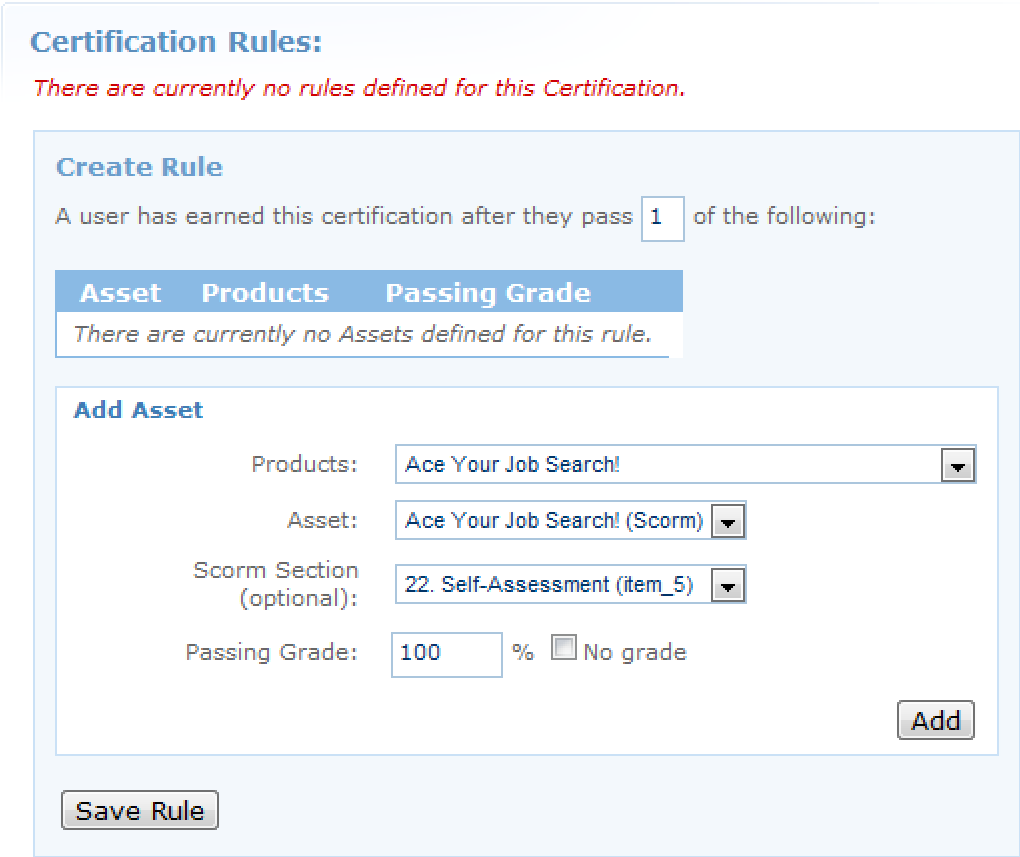


8. Under **Create Rule**, specify the total number of items that must be achieved for the certification.
9. Select a **Product** from the drop-down menu. Only active products show in the menu.
10. Select an **Asset** from the drop-down menu. Inactive assets are identified on the menu. If you have selected a SCORM asset, the certification is applied based on the SCORM's passing requirements, so selecting a SCORM section this is often optional. If the SCORM has multiple SCOs, you may need to select one specifically required for the certification.

Select to View the Rules Available to Each Asset

Asset Type	May be Applied to Certifications	Certification Based on Pass/Fail	Certification Based on Grade Value	Certification Can be Awarded Above Grade Value	Certification Can be Awarded Below Grade Value
Prova Test	Y	Y	Y	Y	Y
SCORM	Y	Y	Y	Y	Y
Module	Y	Y	N	Y	Y
Questionnaire	Y	Y	N	Y	N
Reference	N	N	N	N	N
Wiki	N	N	N	N	N
Classic Evaluations (deprecated)	Y	Y	Y	Y	N

11. Enter the **Passing Grade** requirement as a percentage or use the **No Grade** checkbox to create certifications with SCORM assets to consider complete/incomplete instead of a grade.



Select Here to View Best Practices for Setting Grades

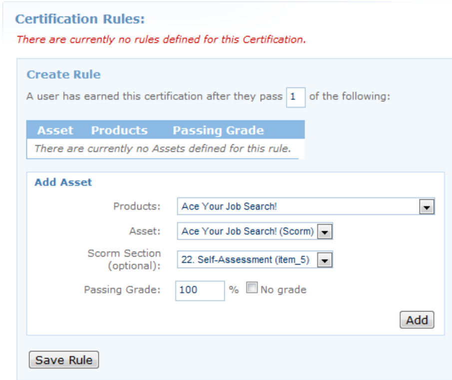
The passing grade of a certification usually matches the passing grade of the requirements (such as a test grade). However, there may be circumstances where a certification may require a higher grade.

- Higher Certification Pass Rates

  If the certification pass rate is set higher than an asset's pass rate, then the user may not be eligible for the certification, even if they passed the asset. This may be desired in cases where you require a higher score for certification, such as trainers or experts.

- Lower Certification Pass Rates

  If the certification pass rate is set lower than the test, then the user may obtain a certification, even if they failed the asset. Enter the **Passing Grade** requirement as a percentage or use the **No Grade** checkbox to create certifications with SCORM assets



to consider complete/incomplete instead of a grade.

12. Select **Add** to accept the rule. Repeat adding assets as required. You can remove added rules, but only before you save them.
13. Select **Save Rule** once all requirements are added. You may create multiple rules.
14. Add or remove multiple User Groups . Please review **Important Things to Keep in Mind when Creating Certifications** above.
15. **Save.** After saving, you will be brought back to the main certification page where you can create, delete, or edit all of the certifications in the system.
16. You may wish to update the certification printout as well (see Update Certification Printout).

Manage Certification Availability

Site Managers can manage certification availability using several methods. Select a method below to learn more.

Individuals can only earn active certifications that are linked to their user groups.

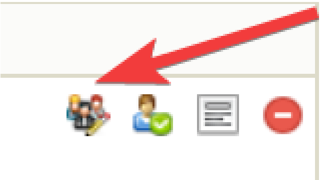
Set an Expiry Date

See Create a Certification .

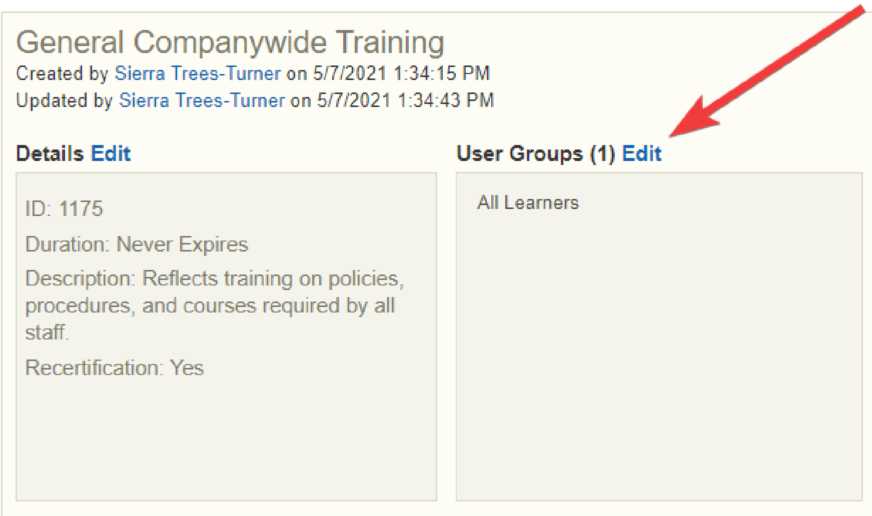
Update User Groups

Site Managers can change the user groups for one certification at a time.

1. Navigate to Certifications .
2. Select **Edit User Groups** for the applicable certification from either List or Detailed View .

   List View

   Detailed View

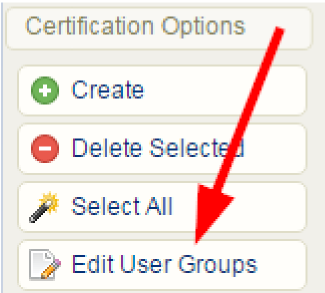
3. **Add** or **Remove** user groups . Optionally filter the user groups with the campus drop-down menu to see user groups belonging to the selected campus.
4. **Save**. After saving, you will return to the certification page.

Overwrite User Groups

Site Managers can overwrite the user groups for multiple certifications.

This action removes existing user groups and replaces them new user groups for all selected certifications. Add any original user groups where the intention is to retain them.

1. Navigate to Certifications .
2. Select multiple certifications by clicking within their selection box.
3. Select **Edit User Groups** from the Certification Options menu. If you cannot see the menu, show the Tool Panel .

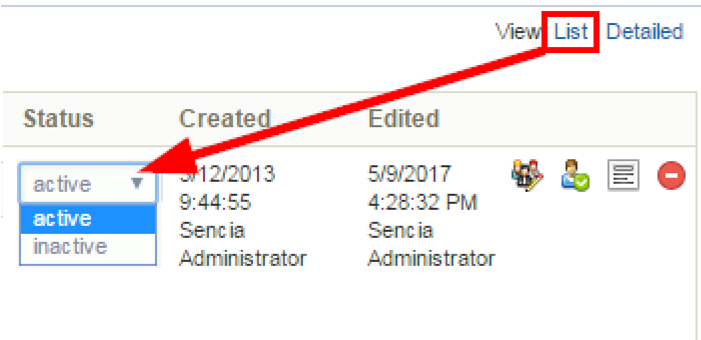


4. Select user groups and then choose **Add.** Select multiple items by holding down the Ctrl or shift keys or by clicking and dragging with your mouse. You can limit the number of user groups you see by using the campus drop-down menu to see only user groups belonging to one campus at a time.
5. Select **Save** at the bottom of the create certificate screen. After saving, you will return to the certification page.

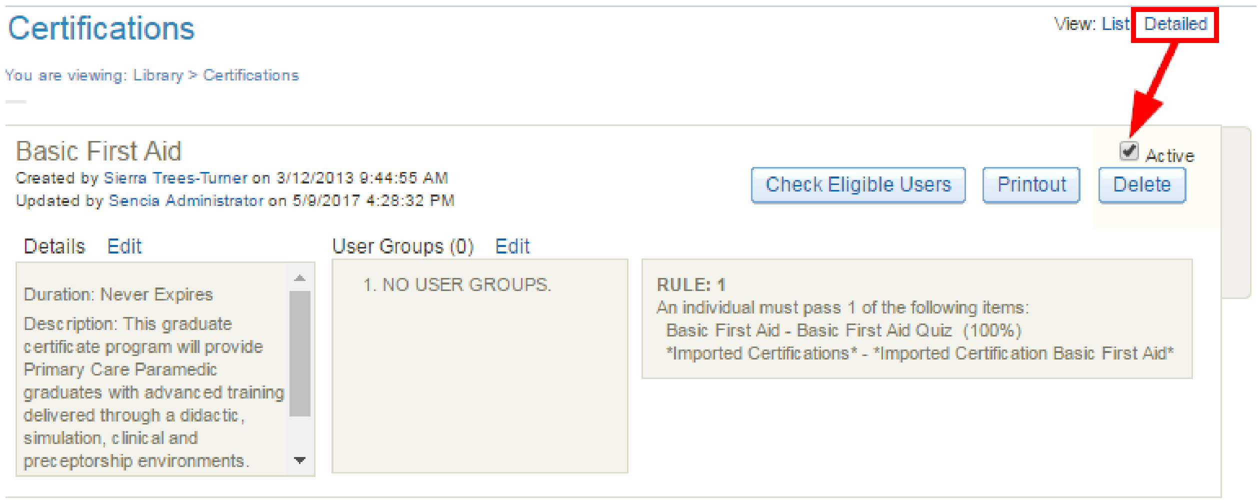
Activate or Deactivate Certifications

Site Managers can change the active status of certifications. Inactivated certifications remain in the system, on reports, and attached to user profiles, but can no longer be earned.

Inactive certifications can no longer be earned but remain available to individuals who previously earned them. Inactive assets are not visible for selection when creating a certification. If you wish to include rules that point to both an inactive asset and an active asset, then you will need to temporarily activate the older assets so you can select them.

1. Navigate to Certifications .
2. To activate or deactivate a certification in list view , use the drop-down menu under Status 

to make a selection.
3. To activate or deactivate a certification in detailed view , select the check box for next to the word **Active**.

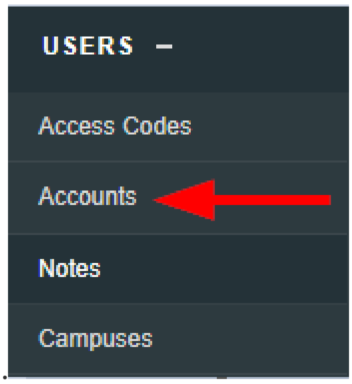


Expire or Delete an Individual's Certification

Site Managers can view all of the certifications an individual has already obtained, is working toward, or is eligible to earn directly from their profile. From the profile, Site Managers can manage an individual's certifications from the individual's profile to expire a certification or remove an earned certification.

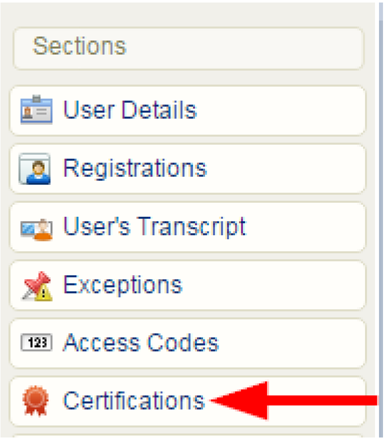
Expire an Individual's Certification

1. Log in with a Site Manager account.

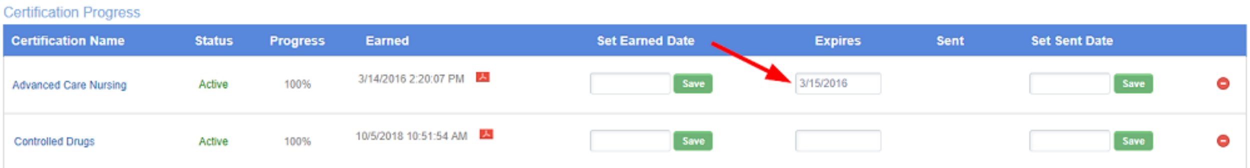


2. Select **Accounts** under Users in the main navigation menu.
3. Select an account name to open the individual's profile.
4. Select **Certifications** from the Sections menu. If you can't see the menu, show the Tool

Panel .



5. Enter an expiry date into the **Expires** field for the appropriate certification.


Certification Progress

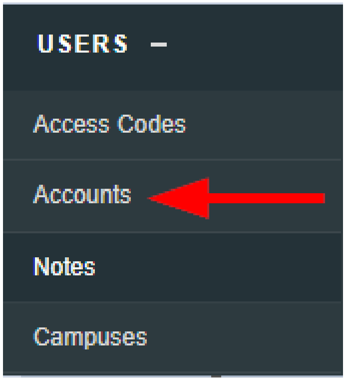
Certification Name	Status	Progress	Earned	Set Earned Date	Expires	Sent	Set Sent Date	
Advanced Care Nursing	Active	100%	3/14/2016 2:20:07 PM	Save	3/15/2016		Save	
Controlled Drugs	Active	100%	10/5/2018 10:51:54 AM	Save			Save	

6. **Save**.

Delete an Individual's Certification

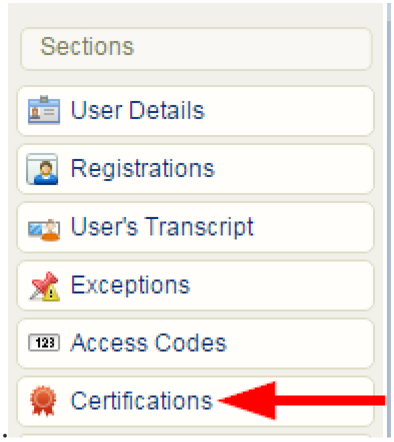
> Certifications deleted from a profile are permanently removed from the system, including reports. An alternative to deletion is to expire the individual's certification.

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

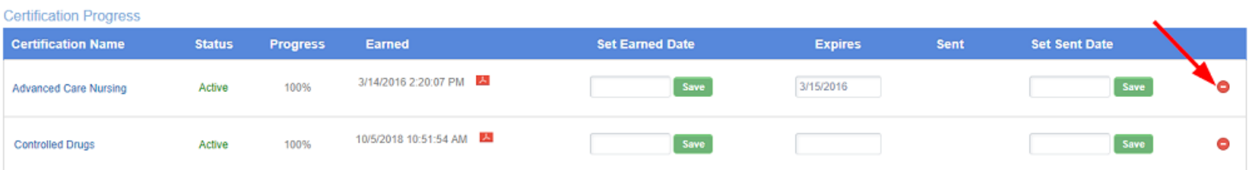


3. Select an account name to open the individual's profile.

4. Select **Certifications** from the Sections menu on the right. If you can't see the menu, show the Tool Panel .



5. Select the delete icon next to any active certification that the individual earned.



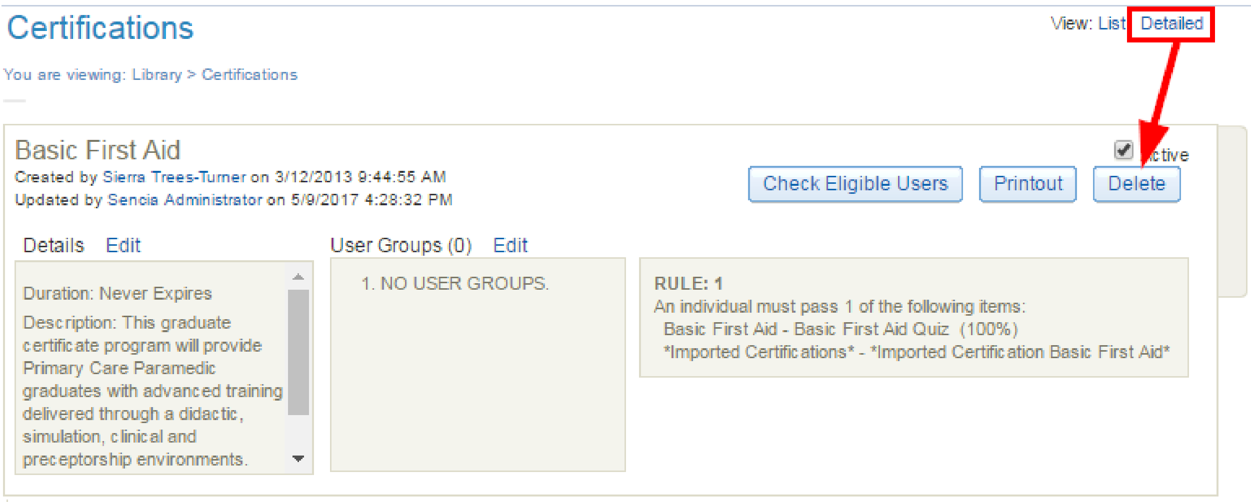
Delete Certifications

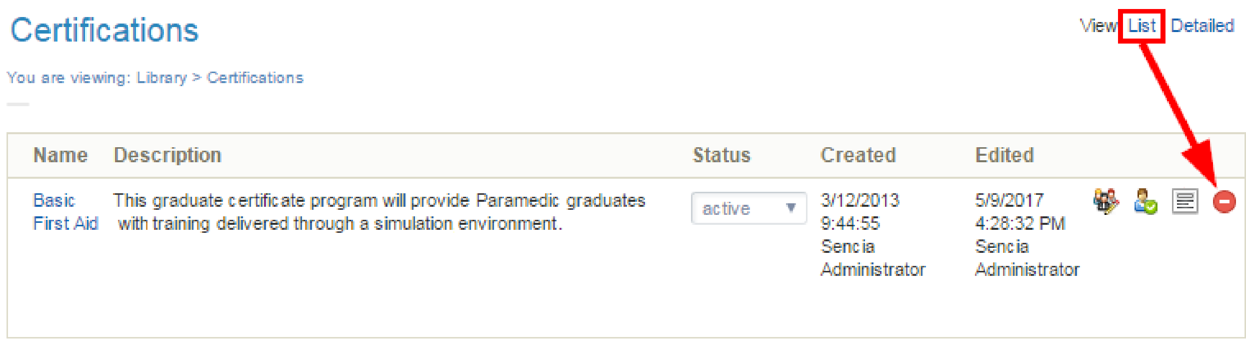
Site Managers can permanently delete one or more certifications. Deletion affects individuals who have already earned the certification.

Deleted certifications are permanently removed from the system, including reports and all user profiles. An alternative is to delete an individual's certification (see above).

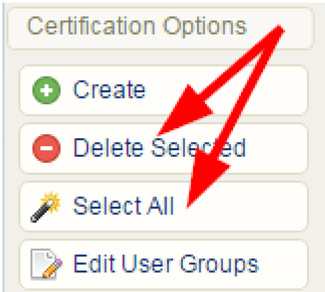
Delete One Certification

1. Navigate to Certifications .
2. To delete a single certification, select **Delete** next to the applicable certification. In detailed view , this is a button; in list view , it is an icon.
3. Select **Yes** when prompted to confirm.





Delete Multiple Certifications

1. Navigate to Certifications .
2. Select multiple certifications by clicking within their selection box. Alternatively, you can use the **Select All** link under the certification options menu on the right and then deselect the certifications that you wish to keep. 

3. Select the **Delete Selected** link in the certification options menu on the right.
4. Select Yes when prompted to confirm.

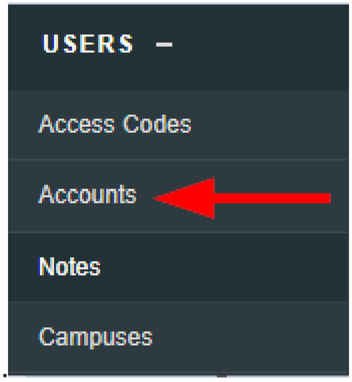
Non-Automatic Certifications

While certifications are typically awarded automatically, there may be circumstances where this is not required. Site Managers have other methods for applying certifications that are not awarded automatically.

Manually Award a Certification to an Individual

If a user has not met the requirements for a certification or has earned it outside of the typical methods, a Site Manager can issue the certification manually.

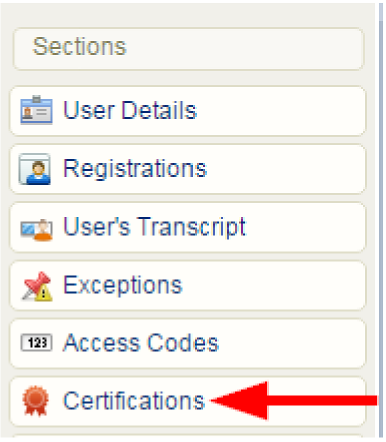
1. Log in with a Site Manager account.



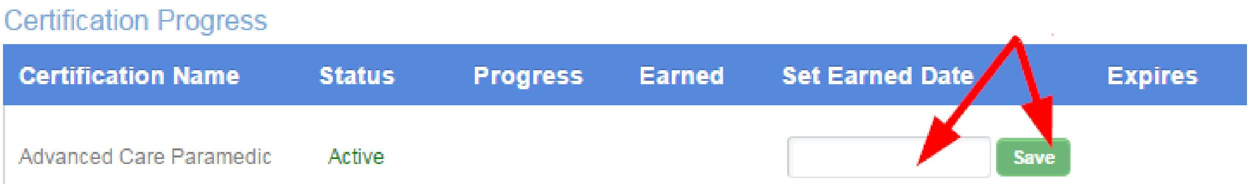
2. Select **Accounts** under Users in the main navigation menu.

3. Select an account name to open the individual's profile.

4. Select **Certifications** from the Sections menu. If you can't see the menu, show the Tool Panel .



5. Enter a date under the **Set Earned Date** field. An expiry date will automatically populate if the certification was created with an expiry in the system. You can do this for any unearned certification listed on the user's profile.



6. **Save**.

Award Certifications Upon Approval

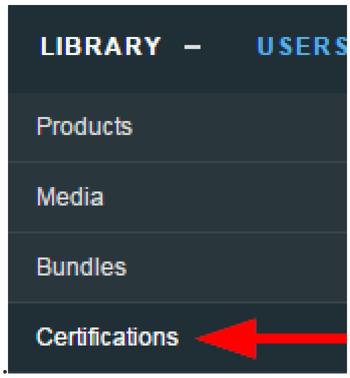
Follow these steps to award a certification only after a review process or upon approval.

1. Create or update a graded module.
2. Add a completion rule to the module that requires a passing grade.
3. Create a certification rule that requires the passing of the module using the same percentage used for the completion rule.
4. Manually grade the module (this can be done by Site Managers, Campus Admins, Campus Managers, Publishers, and Instructors, depending on system configuration).
5. After the passing grade is applied, the certification will be awarded.

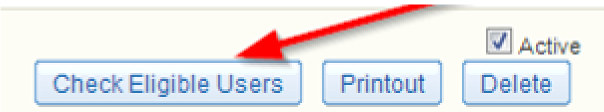
Check Eligible Users

The Check Eligible Users tool can be used to retroactively capture individuals who qualify for a certification that was not automatically awarded. This typically occurs when a certification is added to a new user group or the certification was created after the user completed the requirements.

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



3. Select **Check Eligible Users** next to the applicable certification. In a detailed view , this is a button; in the list view , it is an icon.



4. Select the individuals that require the certification.
5. Choose a certification date and enrolment option to apply to the certifications awarded.
    a. Date options:
        - Select **Today's Date** to apply the certification based on the current date. This is the default date option.
        - Select **Completion Date** to apply the certification based on when individuals satisfied the certification rules. Expiries will still apply.Select a certification date. This selection will apply to all of the individuals selected in the next step.
    b. enrolment options:t.
        - Select **Only Approved enrolments** to apply the certification based on the user's current active enrolment. This is the default enrolment option.
        - Select All enrolments to apply the certification regardless of the user's enrolment status (e.g. if their status is inactive or revoked). The certification will still only be applied where the user has satisfied the certification requirements.

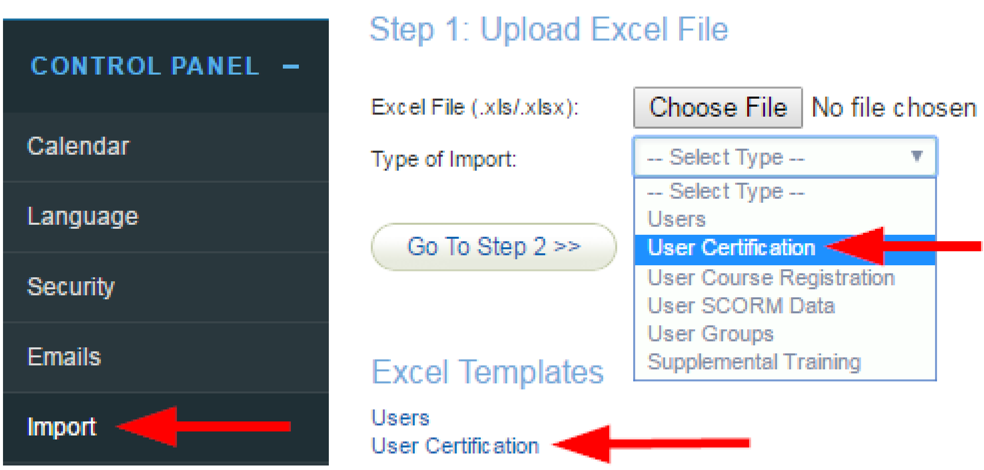
        > **Caution**
        >
        > This option should be used only in rare cases. Note that it in the case of re-enrolment and recertification, this option can apply certifications to a user who did not complete the current enrolment requirements, but does meet the requirements based on a previous enrolment completion.

6. Select the **Approve Selected** button. You will see a confirmation screen letting you know that the certification has been applied to the selected individuals.

Track External Certifications

Site Managers can keep track of certifications earned off-site or for content that is not offered in the system using the import tool. Alternatively, you can scan a copy of an externally earned certification and attach it to a user's profile using the Supplemental Training module.

1. Create a certification .
2. Create at least one rule pointing to an asset that represents the offline content. Many clients opt to attach the certification to a new product created specifically for the certification.
3. Select all user groups. This ensures that the certification can be applied to anyone's record, regardless of their groups.
4. Use the Import Utility to download the user certification excel template, and then populate the template with your data.



5. For the imported users to appear on the **Check Eligible Users** tool, you will need to populate the **Asset** column on the excel file, since certifications are calculated from completed assets, not products.
6. Upload the excel file via the Import Utility. Select the User Certification import type from the drop-down menu.
7. Select **Confirm**.

Best Practise for Asset Association

Associate the certification to an asset that won't grant the certification unintentionally through other methods, such as an asset that is automatically graded or is already associated with another certification. Some Site Managers use dedicated, inactive assets for this very reason.

Certification Updates and Content Revisions

Updating Certifications

While a certification's rules cannot be edited, Site Managers have options when certification requirements change. Determine the best method using the table below.

Method A Multiple Active Certifications for the Same Product(s)	Method B Replacement Certification	Method C One Certification for Both Upcoming & Previous Users
Deciding Factors:	**Deciding Factors:**	**Deciding Factors:**
• Individuals currently in progress should not be affected. • Simple set up for the Site	• Individuals currently in progress could be affected. • Simple set up for the Site	• Individuals currently in progress could be affected. • More complicated set up

Method A Multiple Active Certifications for the Same Product(s)	Method B Replacement Certification	Method C One Certification for Both Upcoming & Previous Users
Manager. • Reports must be run on multiple certifications. • May present a challenge to individuals running reports that may not be aware of multiple certifications. • Individuals may be able to obtain multiple certifications if in associated user groups. • Products and assets from the original certification must not be included in certification rules.	Manager. • Reports must be run on multiple certifications. • May present a challenge to individuals running reports that may not be aware of multiple certifications. • Individuals may only obtain one certification. • Products and assets from the original certification must not be included in certification rules. • This method is ideal for annually revised certifications.	for the Site Manager. • Reports will be run on only one certification. • individuals are only able to obtain one certification. • Products and assets from the original certification must be included in certification rules.
Certification Steps:	**Certification Steps:**	**Certification Steps:**
1. Create new certification .	1. Create new certification .	1. Create new certification .

Method A Multiple Active Certifications for the Same Product(s)	Method B Replacement Certification	Method C One Certification for Both Upcoming & Previous Users
2. Reference the new assets within the rules.	2. Reference the new assets within the rules.	2. Reference both the new and original assets within the rules.
3. Do not inactivate original assets within the certification rules.	3. Inactivate original assets within the certification rules.	3. Inactivate original assets within the certification rules.
4. Do not inactivate the original certification.	4. Inactivate the original certification.	4. Delete the original certification.
		5. Ask Support to temporarily disable certification email alerts, so individuals won't receive an email about a certification they've already obtained.
		6. Use the Check Eligible Users tool to apply the certification to all individuals who obtained the previous certification.

How Content Updates Affect Certifications

Modifications to products and assets may affect associated certifications. The most common scenarios are described below.

Adding or Inactivating Products and Assets

Adding a new asset or product that is required for an existing certification requires the creation of a new certification to include rules for the new asset or product.

> Inactive assets are not visible for selection when creating a certification. If you wish to include rules that point to both an inactive asset and an active asset, then you will need to temporarily activate the older assets so you can select them.

Deleting Products and Assets

The system will prevent you from deleting a product or asset that is associated with a certification.

Updating Assets (Excluding SCORM)

Updating the content within most assets should not affect your certifications. This includes adding or removing questions within a test. SCORM assets may be affected. See **Changing a SCORM Package** below for more details.

Changing a SCORM Package

Certifications that point to a specific SCORM Section (SCO file) are broken when you direct your asset to a new SCORM package. If the SCORM has only one SCO file and a grade or other completion component, then you can direct the certification to the asset alone and not worry about creating a new certification each time you update the SCORM package.

Overwriting a SCORM Package

Overwriting a SCORM package by uploading it with the exact same name as the original will not require you to update associated certifications.

You will affect individuals currently in progress. Overwriting essentially replaces the original file, so this process is not best practice if you intend to keep earlier versions of the SCORM packages.

Certification Sets

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

Site Managers can bundle a group of certifications into a set. A certification set is earned once all of the required certifications in the set are completed. Certification sets are printable just like certifications. A certification set also shows an individual's progress towards completion. An individual can expand a certification set to see the certifications that are required to complete the set as well as the completion status of each certification.

The Earned Date of a certification set is the date the individual earned the last certification requirement in the set.

List Filter

Certification Set Name	Completion Progress	Earned Date	Expiry Date	Outputs
General Company Policies	Completed Items: 8 of 12 Started 66.67 %	N/A	N/A	N/A

Description: Certification awarded for completing policies that are mandatory for all personnel.

Completion Items Required
Minimum To Earn: 12

Item #	Certification Name	Status
1	Documentation and Records Management Policy	Not Completed
2	Corrective and Preventative Action Policy	Not Completed
3	Control of Third-Party Property Policy	Not Completed
4	Change Control Policy	Not Completed
5	Acceptable Use Policy	Completed
6	Client Focus and Satisfaction Policy	Completed
7	Email and Social Media Policy	Completed
8	Office Security Policy	Completed
9	QA and Continuous Improvement Policy	Completed
10	Training & Development Policy	Completed
11	Data Request Policy	Completed
12	Scope of the Quality Management System Policy	Completed

Expiry Dates

- The Expiry Date is the earliest date that any one of the certifications in the set expires. If there are no expiries on any of the certifications in the set, then the expiry date is not applicable.
- Earned certifications will continue to contribute to the completion progress in a certification set unless the certification expires. Re-enroling a user into a product associated with a certification will not reset that certification's status to "Not Completed".

Create a Certification Set

Follow the steps in Create a Bundle .

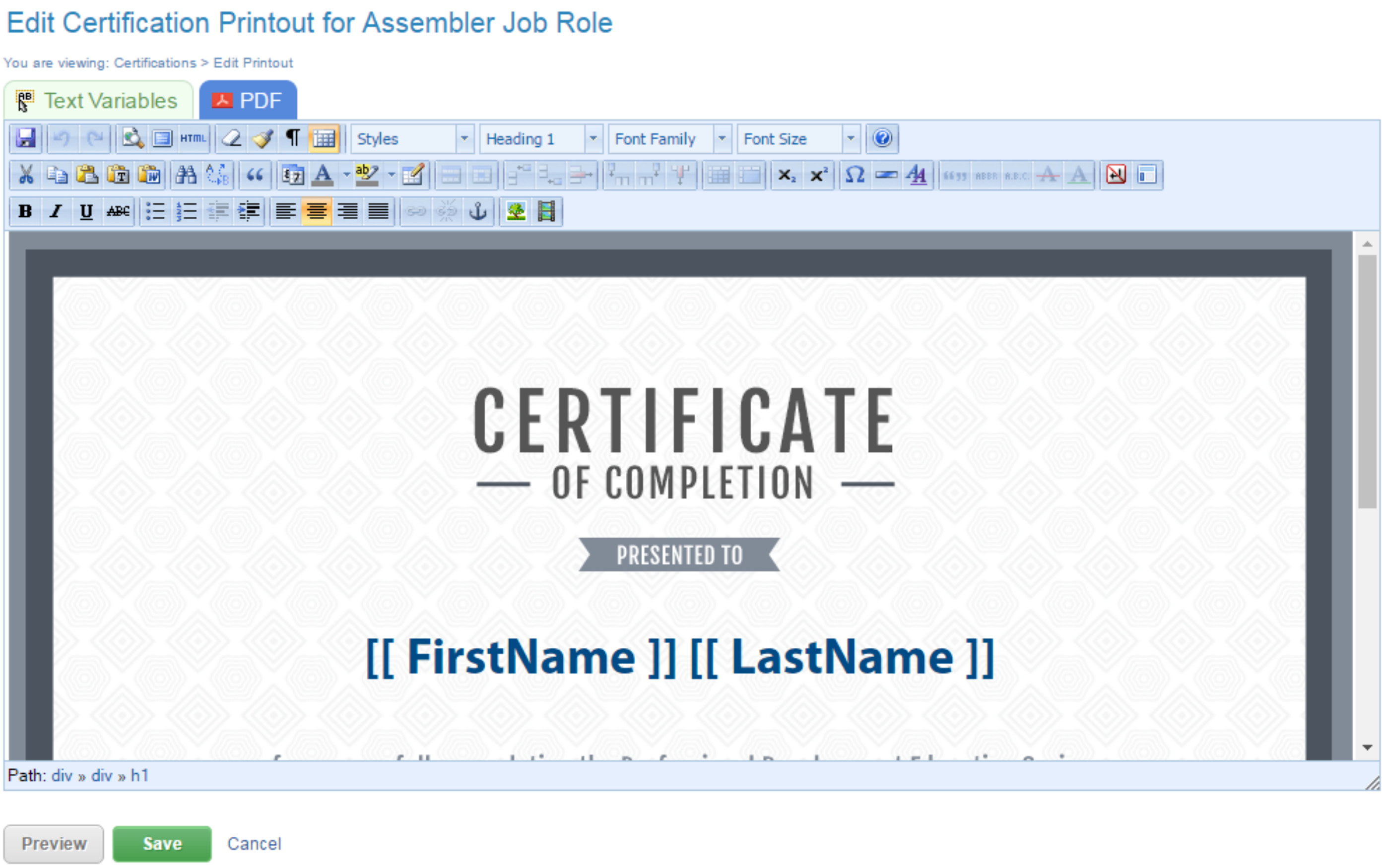
Certification Set Reports

There are two reports dedicated to certification sets.

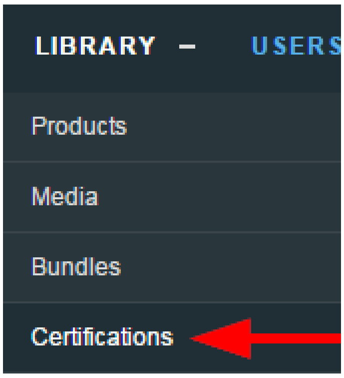
- R111
- R223

Update Certification Printout

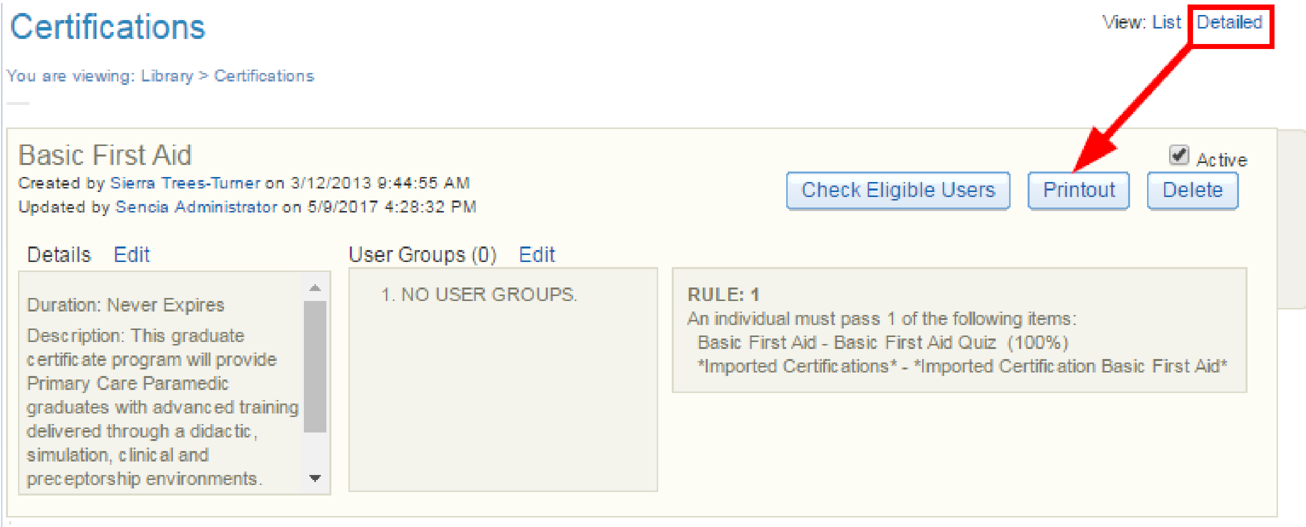
Site Managers can edit how the certificate looks, even after it has been earned.

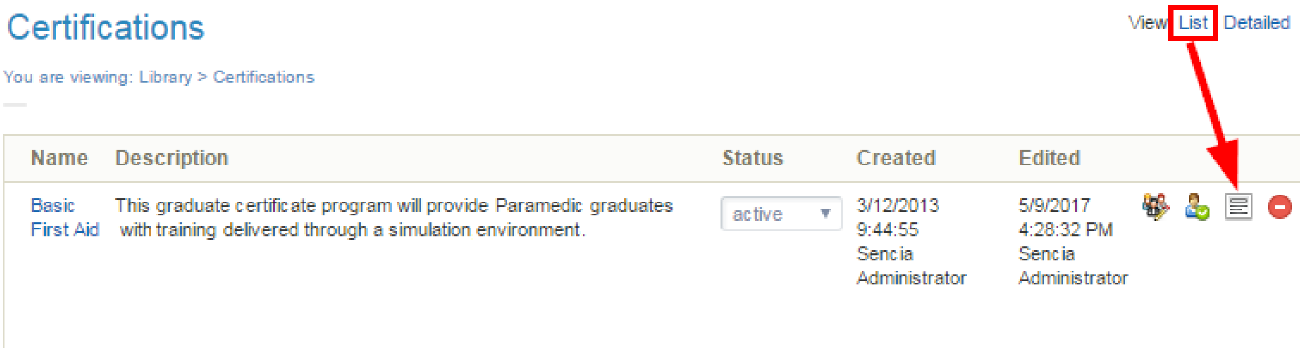


1. Log in with a Site Manager account.
2. Select **Certifications** under Library in the main navigation menu.

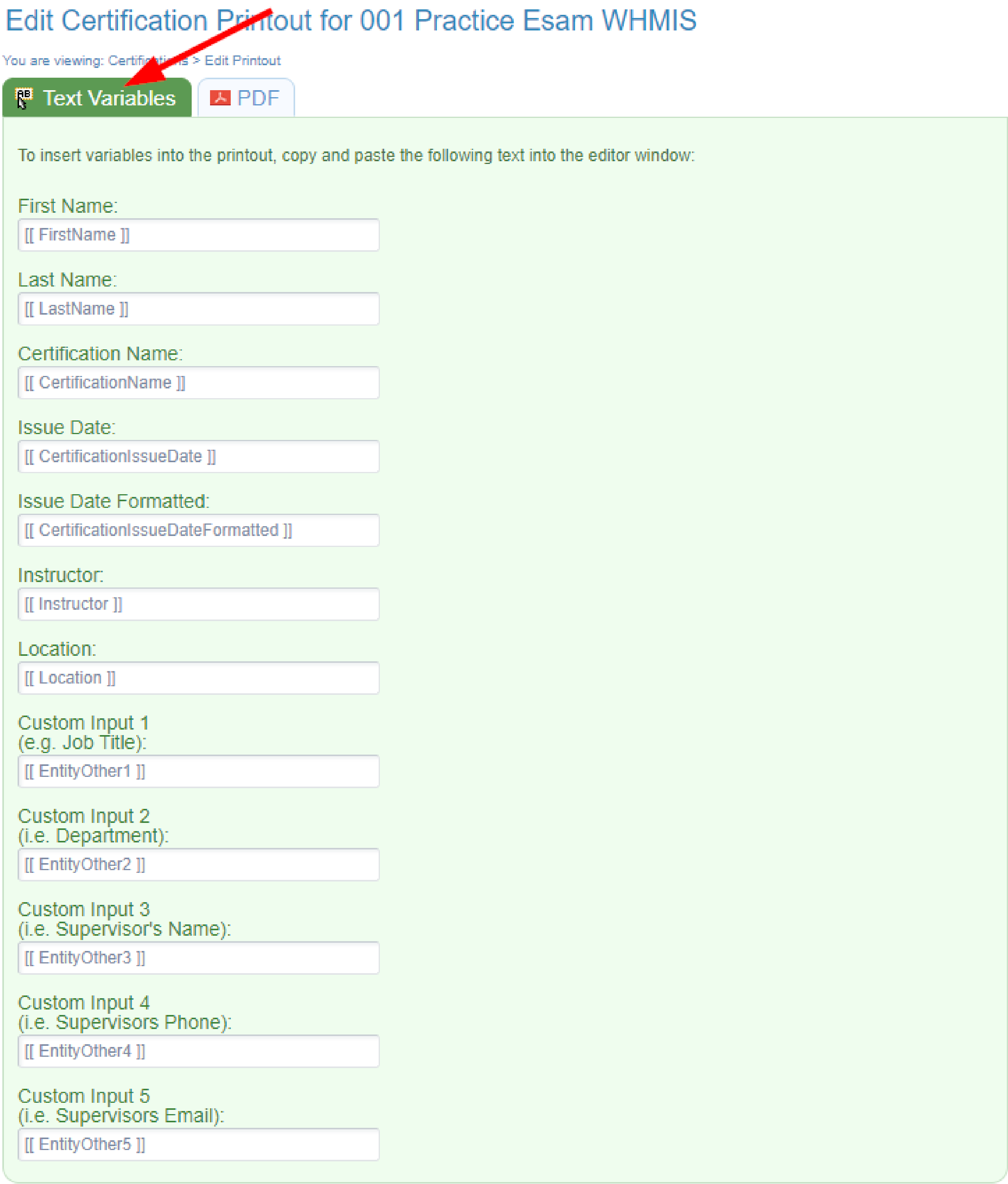


3. Select Printout next to the applicable certification. In detailed view , this is a button; in list view , it is an icon.

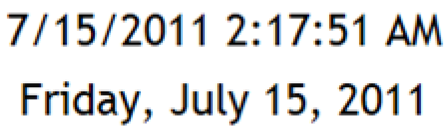




4. Select the **Text Variables** tab. Copy the bracketed text and paste it into the printout content editor . After you create a new certification, you will want to ensure that it contains the necessary automatically populated fields. The text variables tab includes all of the dynamic content placeholders that you can use to auto-populate information on the certifications, such as the learner's first and last name or the name of the certification.



5. There are two dynamic placeholders for dates:



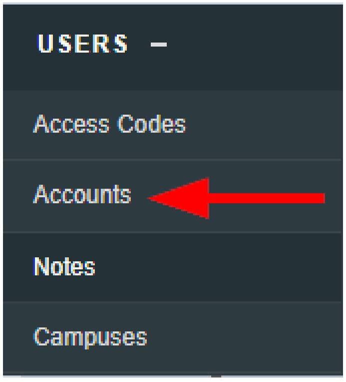
- [[CertificationIssueDate]] has the date and time that the certification was awarded.
- [[CertificationIssueDateFormatted]] shows the date the certification was awarded in

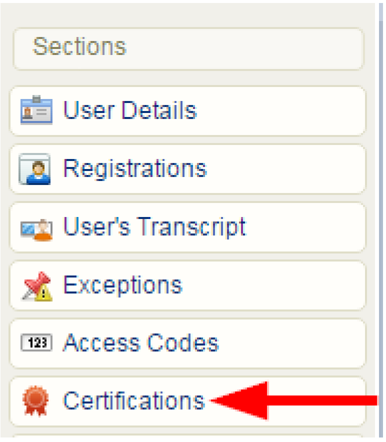
word format without the time stamp.

6. Make desired changes using the content editor , such as inserting images from the media library or replacing the default template.
7. Select **Save**.
8. Press **OK** when prompted.

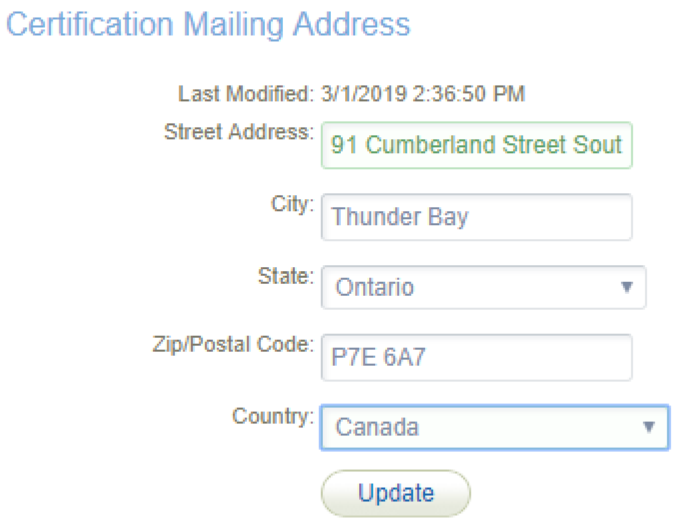
Mail Certifications

Some systems are configured to send a physical copy of a certification to an individual. Certification Sent is the date that the certification was physically sent to an individual.

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


3. Select an account name to open the individual's profile.
4. Select **Certifications** from the Sections menu on the right. If you can't see the menu, show the Tool Panel .


5. Optionally update the Certification Mailing Address at the bottom of the page. The address is automatically populated from the address information on the indvdual's profile if, but can



also be edited by the Site Manager here.

Automatic Training Record upon Certification

This feature is available to Site Managers depending on configuration of the Supplemental Training feature.

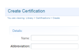
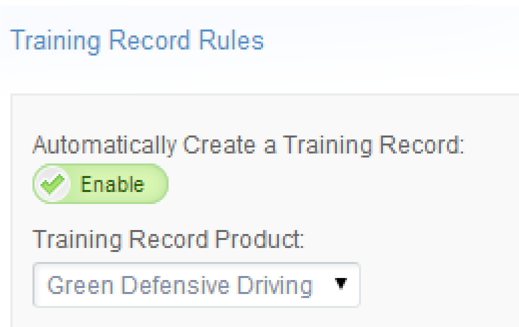
This optional feature can be applied when you create a new certification. It will automatically create an internal supplemental training record associated to a user when they earn a certification. The training record will include an attachment PDF copy of the certification. PDF certifications created in this manner are accessible in the following locations where enabled for your system: Transcripts, My Progress, Certifications pages, and the Supplemental Training screen.

Other methods of creating certifications also support automatic training records. The certifications must have Create Training Record enabled.

- Manually setting a certification earned date from a user's profile. See Expire an Individual's Certification for details. The system will inform that a new training record has been created.
- Check Eligible Users tool. See Check Eligible Users for details.
- Using the import utility to upload existing certifications to users. When training records are created with the import utility, the users' certifications are not affected; a new certification is not granted upon manual creation, a copy is recorded.

Enable Automatic Training Record Creation

The main certification page displays information about training records where applicable.

1. Navigate to certifications .
2. Create a certification or edit an exisiting certification.
3. Enter an abbreviation into the Abbreviation field using a maximum of 10 characters. The training record will not be created without an abbreviation but can be edited at any point after creation. The abbreviation automatically forms part of the attachment name, following this pattern: firstName_lastName_**Abbrev**_Date&TimeStamp.pdf. 
4. Toggle Automatically Create Training Record to **Enable** after creating the certifcation rules. 

Disable Automatic Training Record Creation

The main certification page displays information about training records where applicable. Disabling will not impact the the user's earned certification, existing training records, or previously generated pdf certification attachments.

1. Navigate to Certifications .
2. If in List View , use the drop-down menu to select **Disabled** under Automatically Create a Training Record.
3. If in Detailed View select **Edit,** change Create Record of training to **Disabled**, and then **Save**.

Effects of Deleting, Disabling, and Editing

Training Records

1. Deleting a training record will remove associated training record attachments.
2. Deleting, disabling, or editing a training record will not impact associated earned certifications will not impact associated earned certification information for a user.

Certifications

- Deleting or disabling a certification will not impact associated training records.
- Deleting or disabling a certification will not impact associated training record attachments.
- Deleting or disabling a certification will not impact records in supplemental training reports.
- Deleting or expiring a certification from a user's profile will not impact associated

training records.
- Deleting or expiring a certification from a user's profile will not impact associated training record attachments.
- Deleting or expiring a certification from a user's profile will not impact records in supplemental training reports.

Products

- The system prevents deletion of products associated with a certification based on the certification training record rules.

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:

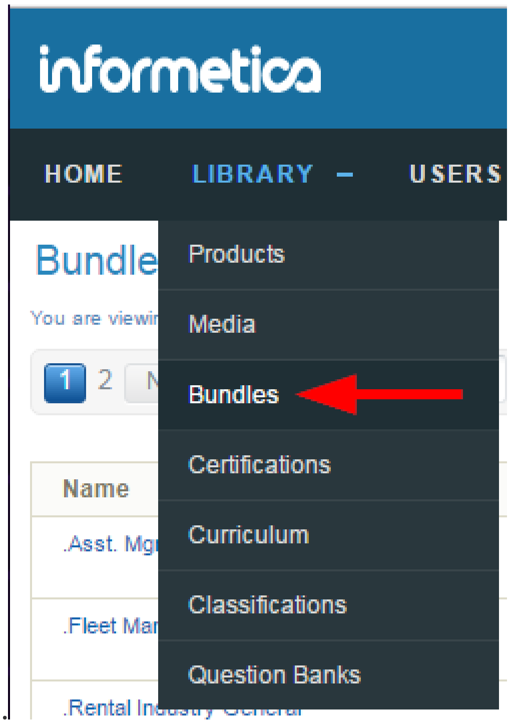
- Bundle courses that are for sale in order to offer a bulk discount.
- Offer individuals a choice between purchasing the entire bundle or separate courses.

e. Bundle certifications together into a set of certifications or a training path.

Navigate to Bundles

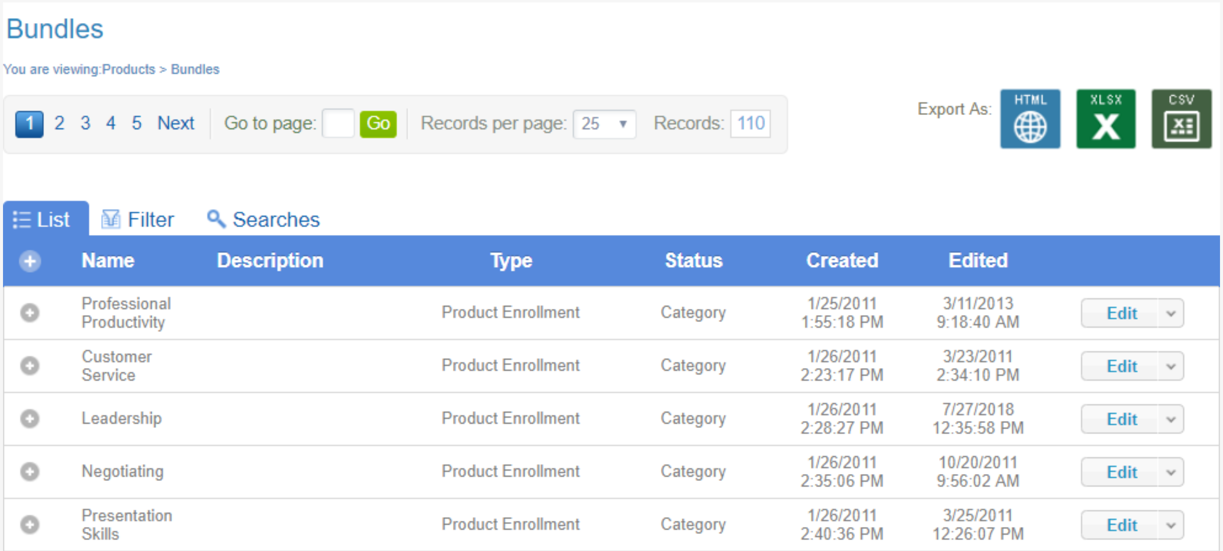
This feature is available to Site Managers depending on system configuration.

1. Log in with a Site Manager account.



2. Select **Bundles** under Library in the main navigation menu.

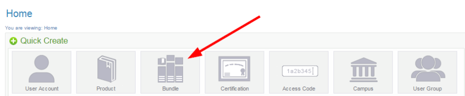
3. A detailed list displays the Bundle Name, Description, Type, Status, and date Created and Edited. This page allows you to view, sort, filter, export, delete, and edit bundles of all types (e.g. categories and certification sets).

> Example of the Bundles page.
>
> 
>

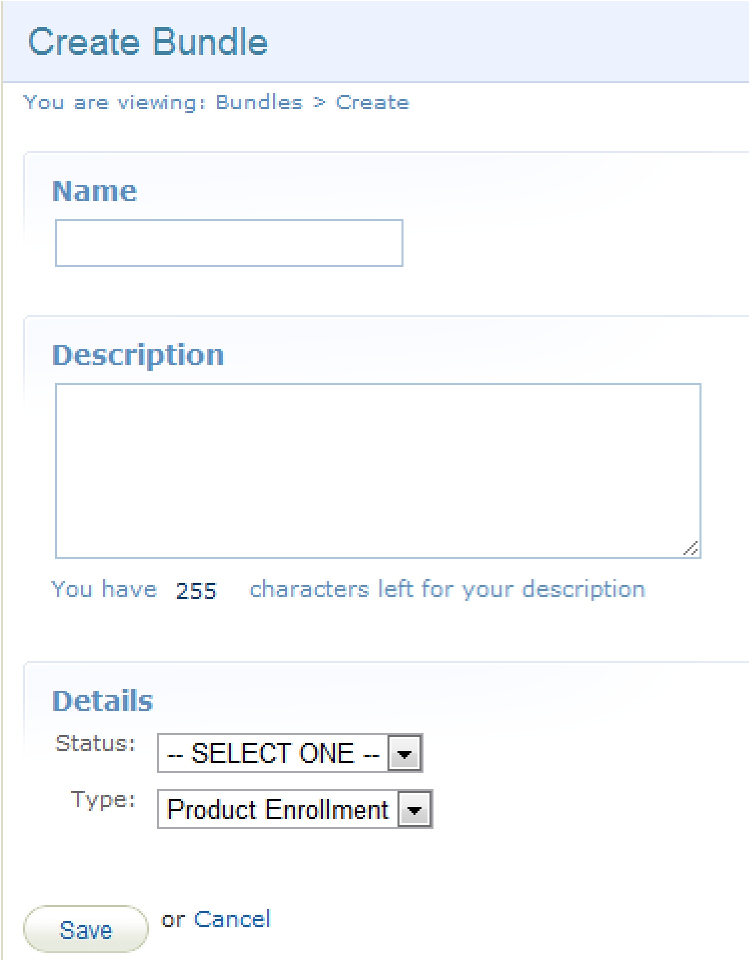
4. Optionally use Filter and Save Searches to locate specific bundles.
5. Optionally export the bundle list.

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.



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 an 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 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 a 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.

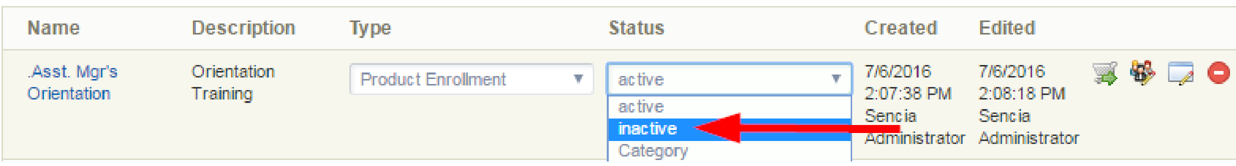
Add or Remove User Groups

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

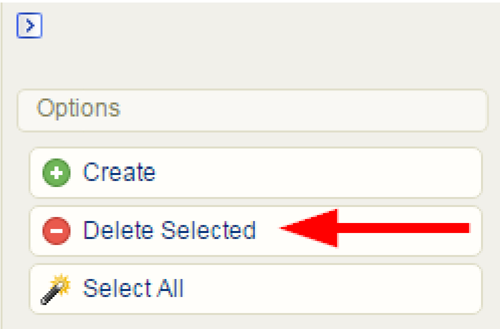
1. Navigate to Bundles.
2. For the relevant bundle, use the drop-down menu to change the status to **inactive** or **active** , as appropriate.



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

   .

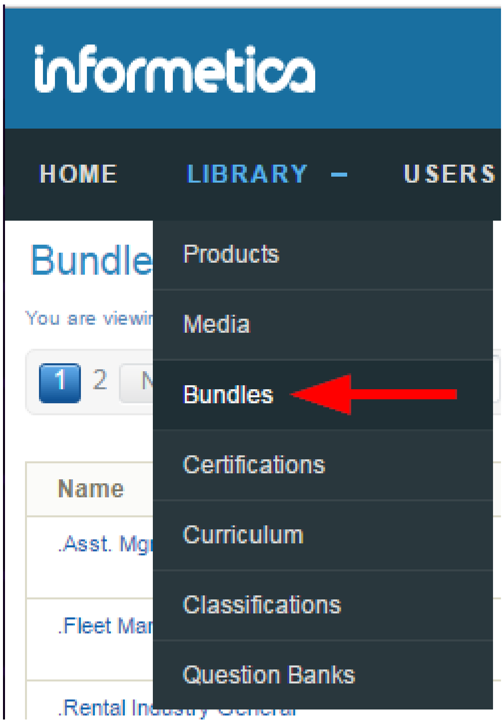
4. On the confirmation prompt, select **OK**.

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

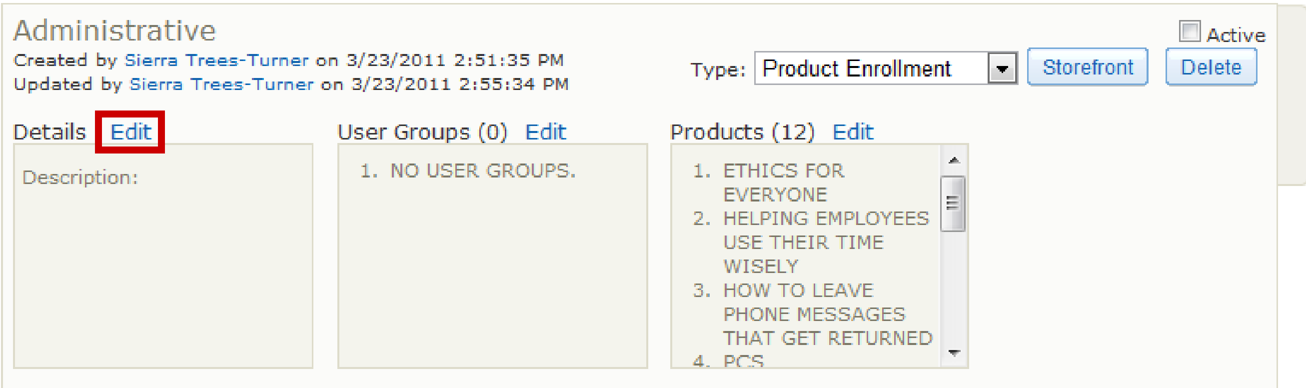
Edit Bundle Name/Description

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

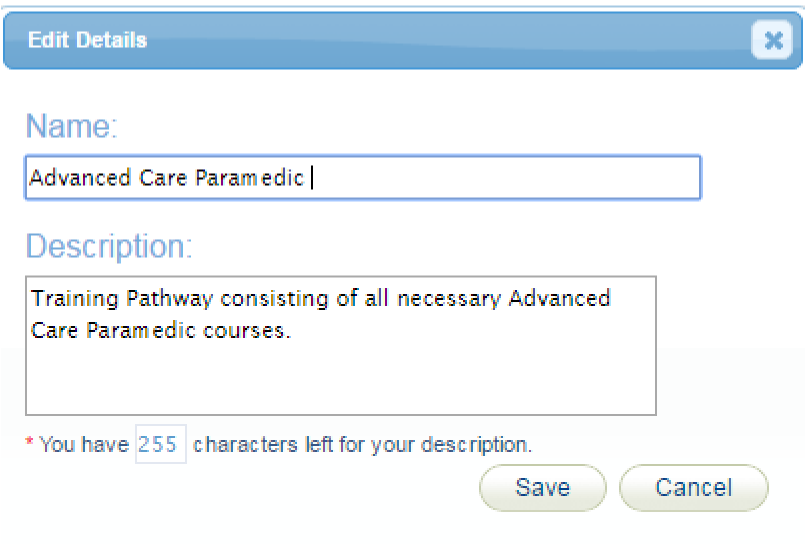
1. Log in with a Site Manager account.
2. Select **Bundles** under Library in the main navigation menu.



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 .



4. Change the name and/or description.



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.

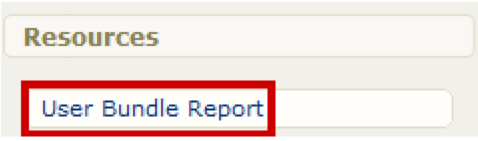
Adding a new product to an existing bundle will not automatically register that product to participants who have access to the bundle. The system will ask if you want to update the registrations for all individuals who have Access Codes associated with that Bundle. Answering yes does all the work.

User Bundle Report

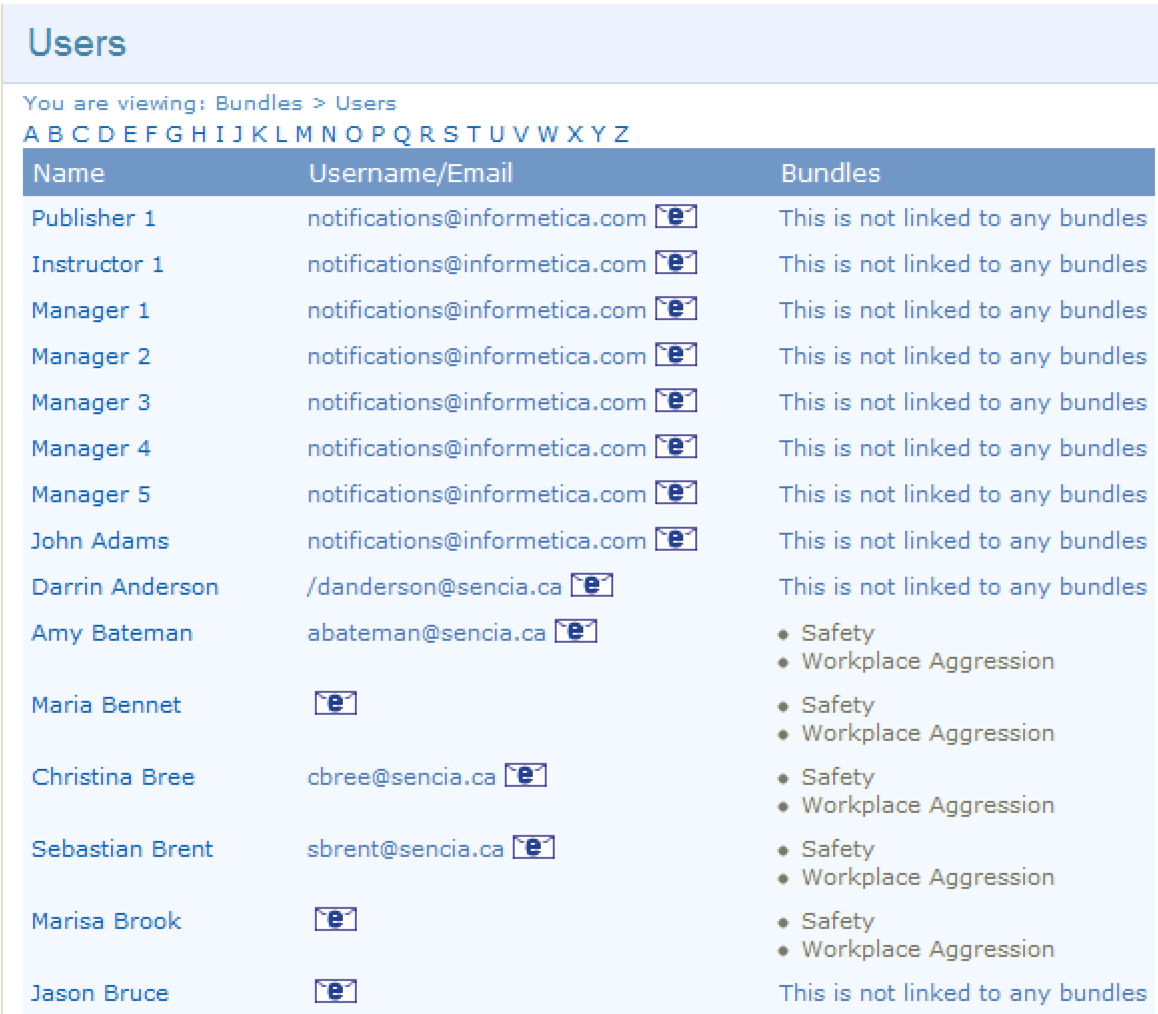
This feature is available to Site Managers depending on system configuration.

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	• Safety • Workplace Aggression
Maria Bennet		• Safety • Workplace Aggression
Christina Bree	cbree@sencia.ca	• Safety • Workplace Aggression
Sebastian Brent	sbrent@sencia.ca	• Safety • Workplace Aggression
Marisa Brook		• Safety • Workplace Aggression
Jason Bruce		This is not linked to any bundles

Access Codes

An access code is a group of alphanumeric characters that can be used to enrol users to content and/or user groups. The methods that access codes can be used is dependent upon the configuration of your system. Access codes are typically associated with a bundle that determines the corresponding content and/or user groups.

Common Ways to Use Access Codes

Enrol Users to Groups and Content

Create an access code with specific user groups and products assigned and then apply the code to selected users to automatically enrol them into the associated user groups and products.

Self Enrolment

This scenario is available to systems that use the Quick Register feature.

Users who already have an account within the LMS can enter a supplied access code into the quick register box on their home page. This action will enrol them to any groups or content associated with the code. The user will be alerted if the code is accepted, if they already used the code, or if the code is invalid.

Guide New Users Through Account Creation

This scenario is available to systems that use a Self Registration Form.

Users who do not have an account can enter a supplied access code from the login screen to create a new account. They will be guided through a quick four step account creation wizard. This action will also enrol them to any groups or content associated with the code.

Navigate to Access Codes

This feature is available to Site Managers, Campus Admins (Type 13), and Campus Managers (Type 6) depending on system configuration.

1. Log in with an appropriate account.
    - If logged in with a Site Manager account, select Access Codes from the Library tab.
    - If logged in with a Campus Admin or Campus Manager account, select Access Codes from the Manage tab.
2. Optionally use Filter and Save Searches to locate specific codes.
3. Optionally Export the list.

Create an Access Code

This feature is available to Site Managers and users with campus level permissions depending on system configuration: type 13 (e.g., Campus Admin) and type 6 (e.g., Campus Manager) .

In most cases you will want to first create a product enrolment bundle to associate the access code to.

1. Navigate to Access Codes.
2. Select **Create** from the options menu. If you can't see the menu, show the Tool Panel .
3. Complete out the **Details** section of the form.
    a. Enter access code **Number**. You can enter your own number or name or let the LMS generate a random number.
    b. Enter an optional **Description** that appears on the Access Code page.
    c. Enter a number of **Credits**. Credits are the number of times this code can be used. Leave blank for unlimited use.
    d. Select a **Status**. Choose active or inactive. Only active codes can be used for registration.
    e. Enter an optional **Expiry** date. The code can no longer be used after the expiry date has passed.
    f. **Registration Form** option is applicable only to sites that use registration forms for user account creation. This option will let you select which form to present during account creation.
4. Complete the **User Groups** section of the form.
    a. Add or remove User Groups .
    b. All user groups joined to the access code are applied to an account upon consumption.
5. Complete the **Add to Access Code** section of the form to link Bundles or Products.
    a. Select **Bundles** to associate an existing bundle of products to this access code.

- Ensure that your bundle is available to the user groups associated to this access code.
- Select **Show Selected Bundle Courses** to help determine the correct bundle selection.

b. Select **Products** to create an access code by selecting products instead of a bundle.

- The LMS will create a bundle behind the scenes and assign randomized numerals for the bundle name.
- You can find the new bundle on the bundles page where you can rename and reuse it if you like.
- All products associated to the access code (using either method above) are applied to an account upon access code consumption.

6. **Save**.

> An access code may only be used once per account, even when a code is allowed unlimited use.

Access Code Availability

You can manage access code availability using several methods. Select a method below to learn more.

Set an Expiry Date

See Create an Access Code .

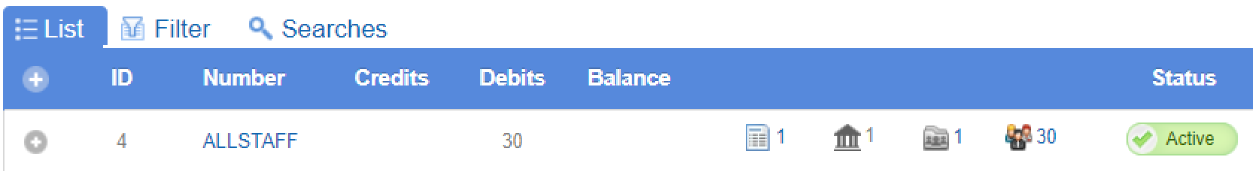
Add or Remove User Groups

See Add/Remove user groups under Create an Access Code .

User groups removed from an access code are no longer applied to an account upon consumption. User groups added to the access code are applied to an account upon consumption.

Change Status to Active or Inactive

1. Navigate to Access Codes .
2. Use the toggle button in the **Status** column to change the access code to acrtiove or inactive.



Inactive access codes remain in the system, on reports, and attached to user profiles, but can no longer be used, even if there are credits remaining.

Delete an Access Code

Delected access codes are permanently removed from the system, including reports. An alternative to deletion is to change the status to inactive.

1. Navigate to Access Codes .
2. Use the split button next to an access code to select **Delete**.

Manage Access Code User Groups

1. Log in with a Site Manager account.
2. Navigate to Access Codes.
3. Select Edit.
4. Add or remove user groups in the access code.
5. **Save** when you have finished updating the user groups that are associated with this bundle.

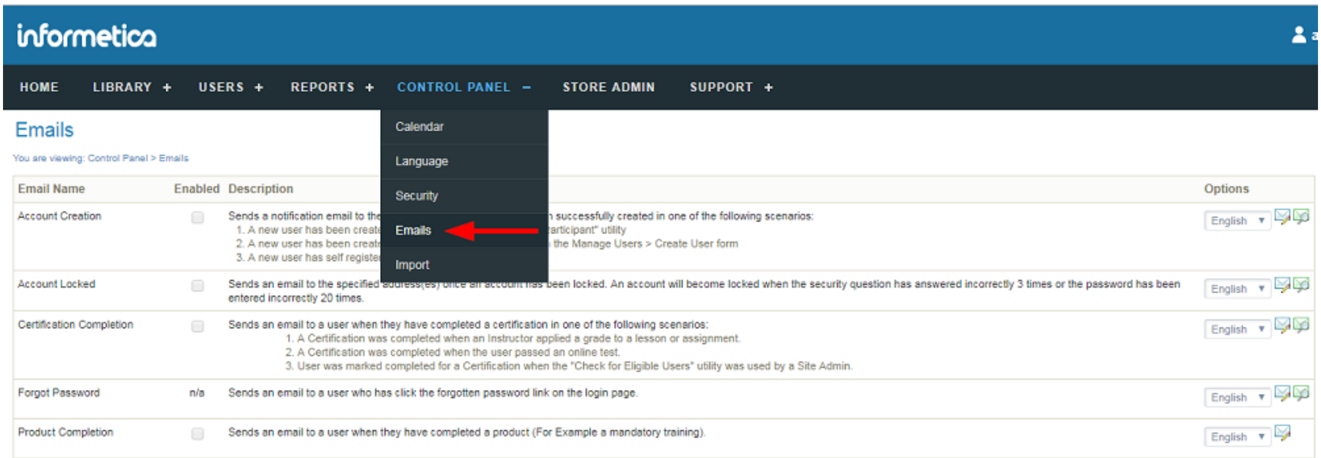
Adding a new product to an existing access code will not automatically register that product to participants who already consumed the access code. However, if the access code is associated with a bundle, the system will ask if you want to update the registrations for all individuals who have access codes associated with that bundle. Answering yes does all the work.

Email Notifications

Site Managers can customize automated email notifications with multiple language support. These emails can be set up to automatically alert individuals regarding certain interactions such as when a new account is created, a course is completed, or a certification is about to expire. These notifications inform individuals without requiring them to log in to the system. Emails can be managed on two different levels: system emails and campus emails.

Navigate to Email Notifications

1. Log in with a Site Manager account.
2. Select **Emails** from the Control Panel.

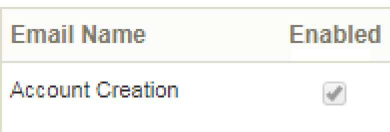


Enable or Disable Emails

Enable Emails

To enable campus level emails, see Add Campus Emails .

1. Messages must be enabled for your system before you can use them. Navigate to Email Notifications . Any notifications that have a check in the **Enabled** column are available for you



to use.

2. To enable any notifications that are not available on your system, create a ticket using the Service Request System (SRS) detailing the emails you want added.

Disable Emails

To disable campus level emails, see Reset or Remove Campus Emails .

1. To disable an email, removing the entries in any of the following mandatory fields: To, From, Subject or Message Body. Disabling a default email this way will not affect an email that is enabled at the campus level.
2. To completely remove an email for your entire system, create a ticket using the Service Request System (SRS) detailing the emails you want removed.

Notification Text

Site Managers may update the content in email notifications.

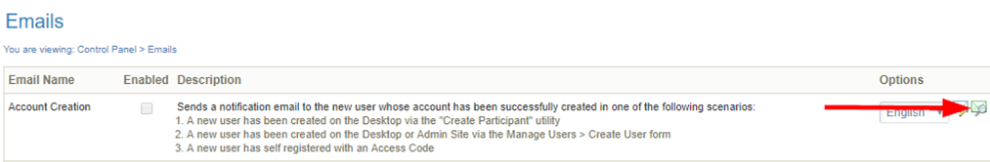
1. Navigate to Email Notifications or Campus Emails , as appliable.
2. Select **Edit Email** next to a selected email notification.
3. Select the language for this email, if applicable.

   > When a new language is added to the system, the system will require all email notifications for the new language to be either disabled or configured. When a language is disabled, email notifications related to this language will also be disabled. The Site Manager must confirm that they wish to disable all notifications before this action will occur.

4. Enter the email content. The following email fields are required: To, From, Subject, and

Message Body. If any of these fields are empty, the email will not be sent.

   a. ***To:** This field is set to Automatic so that it will be sent to all Participants.
   b. **CC/BCC:** If necessary, you can add email addresses to the CC and BCC fields. Multiple email address must be separated by a comma.
   c. ***From:** Enter the email address that recipients will receive this email from.
   d. ***Subject:** Enter the subject line for the email message.
   e. ***Message Body:** Enter text for the message, using email pre-set text as applicable (see below).

5. **Save**.
6. Optionally select **Preview Email** next to any email notification to view what the email subject and body will look like. 

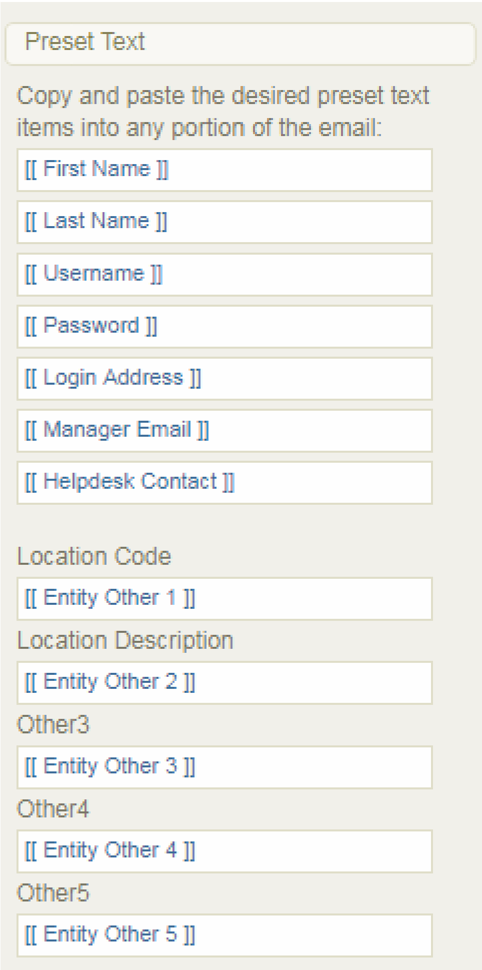
7. Optionally add a signature. For campus emails, View Emails for One Campus .
   a. Select Campuses under the Users tab in main navigation bar.
   b. Select **Edit Emails** for a specific campus.
   c. Select **Edit Signature** from the email tools menu to open the Edit Email Signature page. The signature will apply to all enabled and activated emails for the campus.
   d. **Save**.

Pre-Set Text

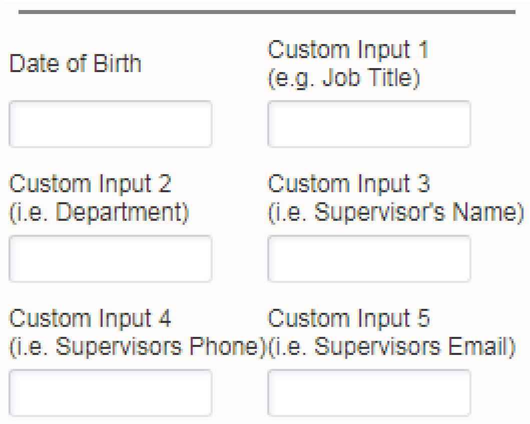
Brackets are Mandatory

When using pre-set text, include the brackets [[ ]] around the text. You can copy/paste the string to ensure the correct format.

Use optional preset text when creating email content. These dynamic text strings automatically replace values specific to each email recipient. For example, entering [[First Name]] into the body of the email will automatically insert the user's first name. The Site Manager may choose to use the same or different pre-set text for the system and each campus. The image below shows an example of preset text options when creating email.



Pre-set text using location information is pulled in from user profile fields. The image below shows the relevant area from a user's profile.



Example Email Messages

Site Manager may use the provided example text to write email notifications. Feel free to copy and paste them into your own emails and tweak as needed.

Account Creation

Subject: Welcome to the Company Learning Management System

> Thank you,
>
> Company name
>
> Contact information
>
> Course administrator name
>
> To access your e-Learning course, please click this link system login page and enter the username and password provided below. We recommend that you change your password once you are in the system.
>
> Username: [[Username]]

> Password: [[Password]]
>
> Should you have any questions, please contact company email or call company phone.

Account Locked

Subject: Your account is locked for security reasons

> We apologise for the inconvenience. For your security, user accounts are locked automatically if the password has been entered unsuccessfully too many times. Your account will unlock automatically and be available in 1 hour.

Certification Complete

Subject: You have earned a certification

> Congratulations, [[First Name]] [[Last Name]], you have completed the following certification:
> [[Certification Name]] on [[Certification Obtained Date]]
>
> Don't forget to print your certificate of completion for your training records. To do so, log back into the course and click on the Certifications tab.
>
> Should you have any questions, please contact company contact information.

Certification Expiry Reminder

Subject: Certification Renewal Necessary

> Greetings from the company name team.
>
> We are providing you with notice that the following certification(s) will soon expire:
>
> [[Certificate List]]
>
> Ensure that you renew your certificate prior to the expiry date to avoid any compliance issues.
>
> If you require any assistance, please contact your supervisor.

Forgot Password

Subject: Training Centre Login Information

> Hello [[First Name]] [[Last Name]],
>
> Here is your login information for the company name Training Centre.
>
> Your Password is: [[Password]]
>
> Please contact [[Helpdesk Contact]] or call phone if you have any questions.

Product Complete

Subject: Course Completed

> Congratulations on successfully completing [[Course Name]]!

> Please contact company email or call company phone if you have any questions.

Product enrolment

Subject: You have been enroled in a course

> You have been enroled in the following course: [[Course Name]]. To begin your training:
>
> - Go to system login page and log in with your username and password.
> - Click on the course title in the left side-bar menu to access the online training you
>
> registered for or are required to participate in, and begin.
>
> We hope you enjoy the course!

Product Exception

Subject: Course Date Extended

> [[First Name]], your [[Course Name]] online course has been extended until [[Exception End Date]].
> To access your online training, log in to system login page with your username and password.
>
> Please feel free to contact us with any questions or concerns at company email or company phone.
>
> Thank you and we hope you enjoy the course!

Product Expiry Reminder

Subject: Course Expiry Reminder

> Greetings from the company name team.
>
> This is a friendly reminder to complete the following course(s) prior to the expiry date.
>
> [[Course List]]
>
> If you require assistance, you can email us at [[Helpdesk Contact]] or call phone.

Training Expiry Reminder

Subject: Training Expiry Reminder

> Greetings from the company name team.
>
> We are providing you with notice that the following training item(s) will soon expire:
>
> [[Training List]]
>
> Ensure that you renew your training prior to the expiry date to avoid any compliance issues.
>
> If you require any assistance, please contact your supervisor.

Email Signature

Thank you,

Company name

Contact information

Course administrator name

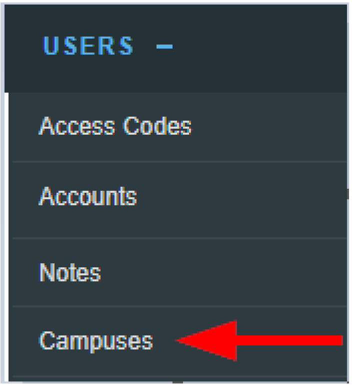
This e-mail (including any attachments) is intended for the addressee(s) stated above only and may contain confidential information protected by law. You are hereby notified that any unauthorised reading, disclosure, copying or distribution of this e-mail or use of information contained herein is strictly prohibited and may violate rights to proprietary information. If you are not an intended recipient, please return this e-mail to the sender and delete it immediately hereafter. Thank you.

Campus Emails

Site Managers can add, remove, and edit email notifications for a specific campus. Email notifications set up for a campus will over ride any default email notifcations sent from the learning management system. For more information on setting up emails, see the chapter on Email Notifications.

View Emails for One Campus

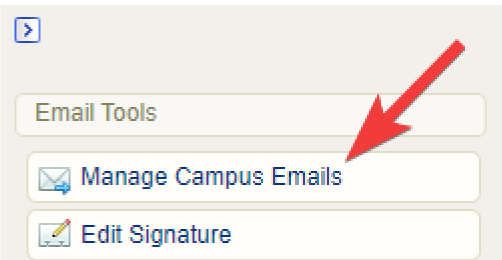
1. Log in with a Site Manager account.
2. Select **Campuses** under Users in the main navigation menu.



3. Select **Edit Emails** next to the desired campus to view the Manage Campus Emails page. You may see Add Emails instead. This means that the campus is using only the site's default email notifications.
4. Emails that are set up for the campus will have both the Enabled (enabled for the site) and the Send Email (enabled for the campus) options checked.

View Emails for Multiple Campuses

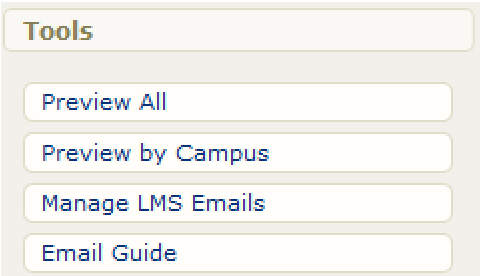
1. Navigate to Emails .
2. Select **Manage Campus Emails** from the Email Tools menu. If you can't see the menu, show the Tool Panel .



3. Optionally **Sort** alphabetically by campus name or by email name (ascending or descending)**.** If you can't see the menu, show the Tool Panel .
4. Optionally **Filter** and select **Go**. If you can't see the menu, show the Tool Panel . The filter optons are:
   - Reset: remove any current filters.

- Campus: Enter a word in the campus name.
- Status: Use the drop-down menu to show only active or inactive emails.
- Language: Use the drop-down menu to show only emails using a specific language.
- Type: Use the drop-down menu to show only the emails with a specific name.

5. Optionally preview email message content. Select **Preview All** or **Preview by Campus** from the Tools menu. If you can't see the menu, show the Tool Panel .



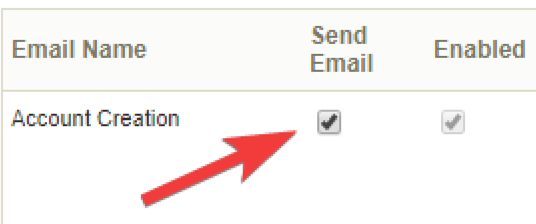
Campus level emails are sent based on the user's default campus.

Add Campus Emails

Campus level emails are sent based on the user's default campus.

1. Navigate to campus emails .
2. Select **Add Emails** to open the Manage Campus Emails page.

3. Select **Enable Email** for one or more email notifications.



4. Write the email Message Content .

5. **Save**.

> Active campus emails must have both the Enabled (enabled for the site) and the Send Email (enabled for the campus) options checked. See Enable or Disable Emails to learn more.

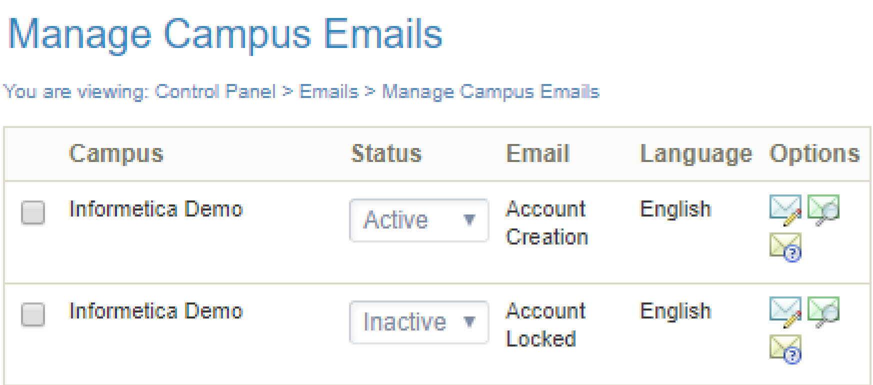
Reset or Remove Campus Emails

Site Managers can remove the custom emails notifications for a campus and reset them to the system default emails. Pick the scenario below that applies to your situation.

Deactivate Campus Emails

Site Managers can choose to deactivate one or more emails for campuses.

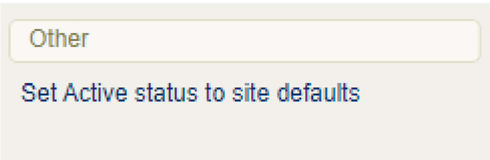
1. View Emails for Multiple Campuses .
2. Set the status to Inactive using the drop-down menu for the applicable emails.



Set Active Status to Site Defaults

Site Managers can to match selected campus emails to match the same email types set up for the system default emails. For example, if the system only uses two default emails: Account Creation and Product enrolment, when you set active status to site defaults, that specific campus's emails will send only Account Creation and Product enrolment notifications. You can still customize the email content for the campus.

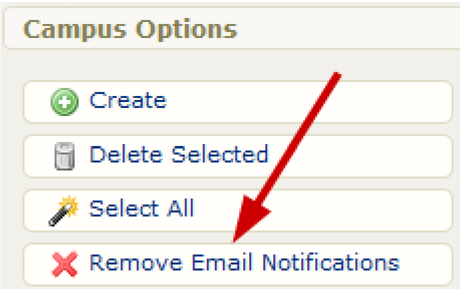
1. View Emails for One Campus .
2. Select **Set Active Defaults Status to Site Defaults** from the Other menu**.** If you can't see the menu, show the Tool Panel .



Reset all Emails for One or More Campuses

Resetting all emails for a campus will remove all the unique campus emails and replace them with the default system emails.

1. View Emails for One Campus .
2. Select campuses.
3. Select **Remove Email Notifications** from the Campus Options menu. If you can't see the menu, show the Tool Panel .

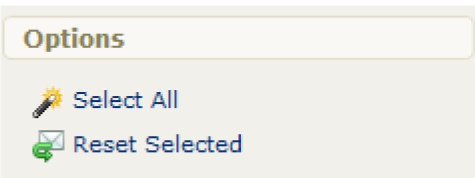


Reset Selected Emails for a Campus

Resetting an email will remove the unique campus email and replace it with the default system email. Only emails set to active need to be reset.

1. View Emails for Multiple Campuses .
2. Select the applicable emails. You can select the emails using the check boxes in front of the emails or by using Select All under the Options menu. If you can't see the menu, show 

the Tool Panel .
3. Select **Reset Selected** from the Options menu. If you can't see the menu, show the Tool Panel .

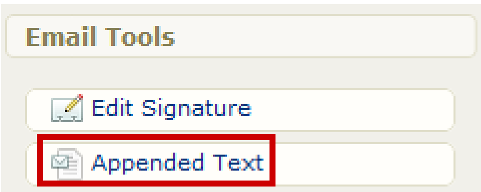


Product-Specific Emails

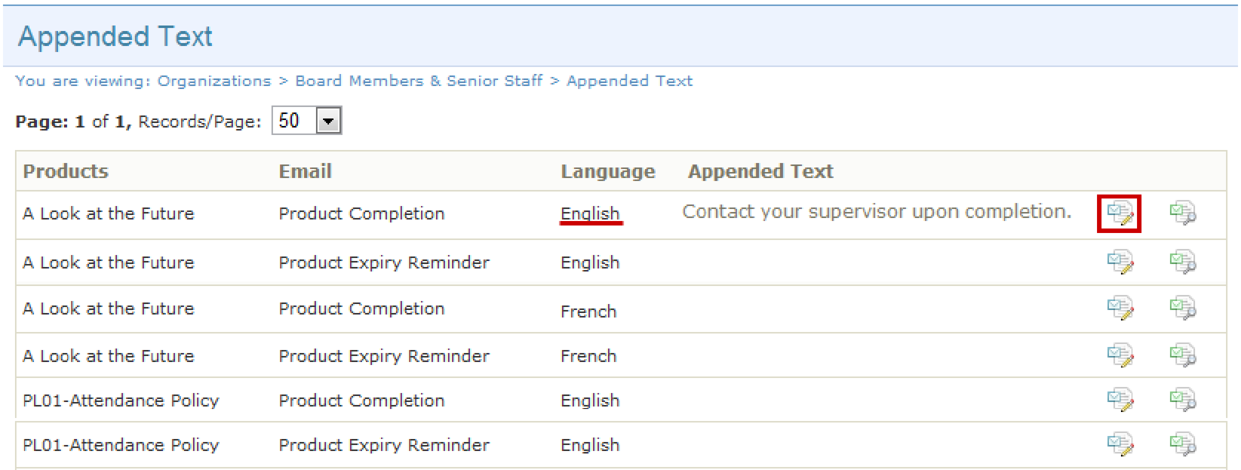
Site managers may add product-specific content to product emails based on a specific course and language. This feature is useful to convey information that is not needed by everyone taking a course but is important for individuals belonging to a specific campus.

You must have campus emails enabled to sent product-specific emails. The following email notifications support product-specific emails:

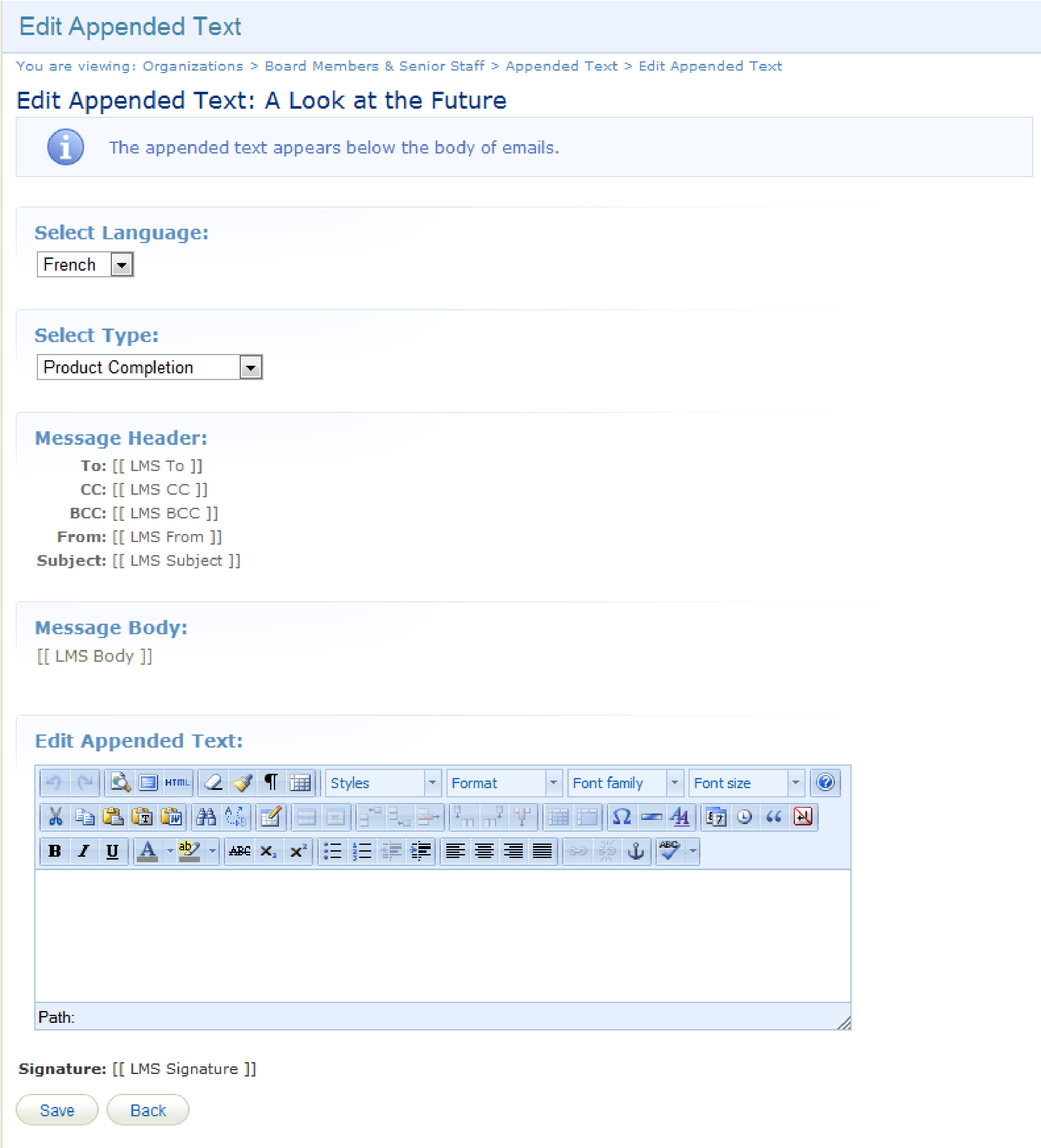
- Product Completion
- Product enrolment
- Product Exception
- Product Expiry Reminder

1. View Emails for One Campus .
2. Select **Edit Emails** for the Campus of your choice to open the Manage Campus Emails page.
3. Select **Appended Text** link under Email Tools on the right. If you can't see the menu, show the Tool Panel .


4. Select the **Edit Appended Text** button next to the appropriate product, email notification, and language that you want to add the text to. Each Product is listed once per email and language.



5. Use the content editor to design the message text.
6. **Save**. The appended text will show up after the email body content, but before the signature, if you have one set up. After you save it, the appended text will appear on the Appended Text page. If you have no other body text entered, the email will still be sent as long as the To, From, and Subject fields are filled out.



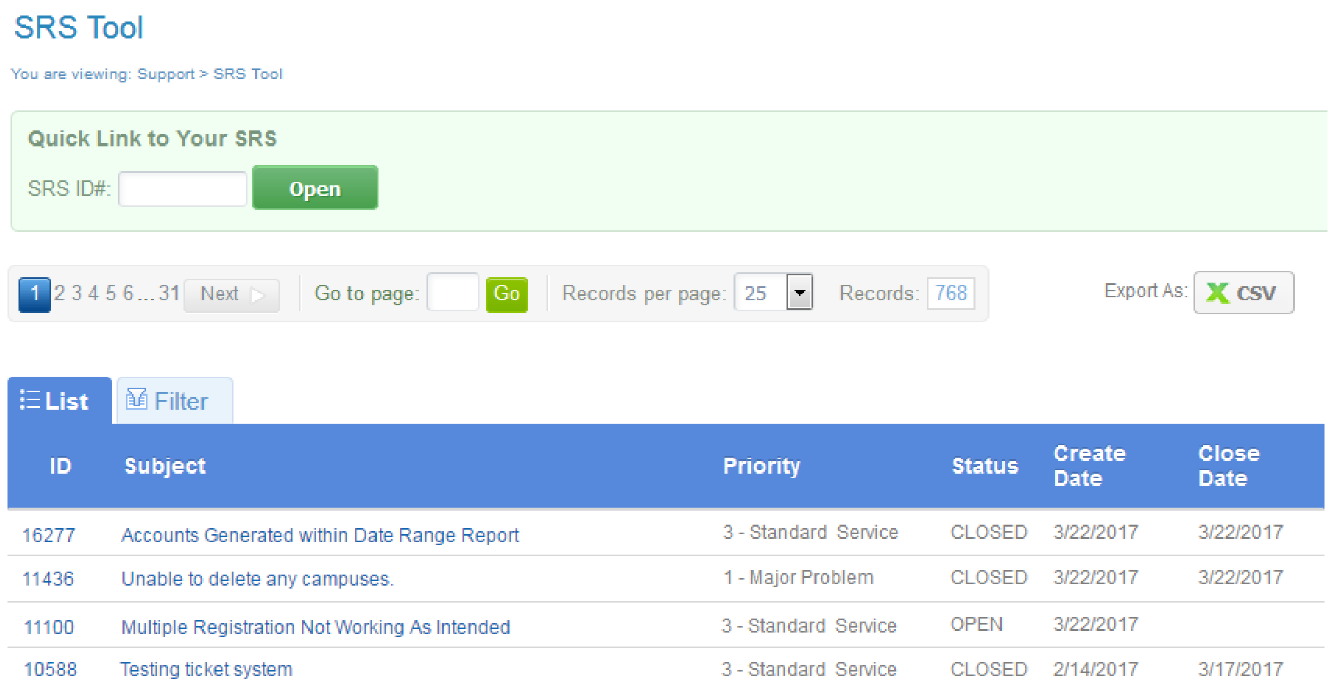
7. Optionally select **Preview Appended Text** to review the Product email notification and the appended text.

Service Request System

Support issues and system inquiries are handled through the Support Request System (SRS Tool). The SRS Tool is a Site Manager's best method to communicate issues to support staff. It stores the responses and solutions for each ticket and maintains an accessible historical log.

Navigate to the SRS Tool

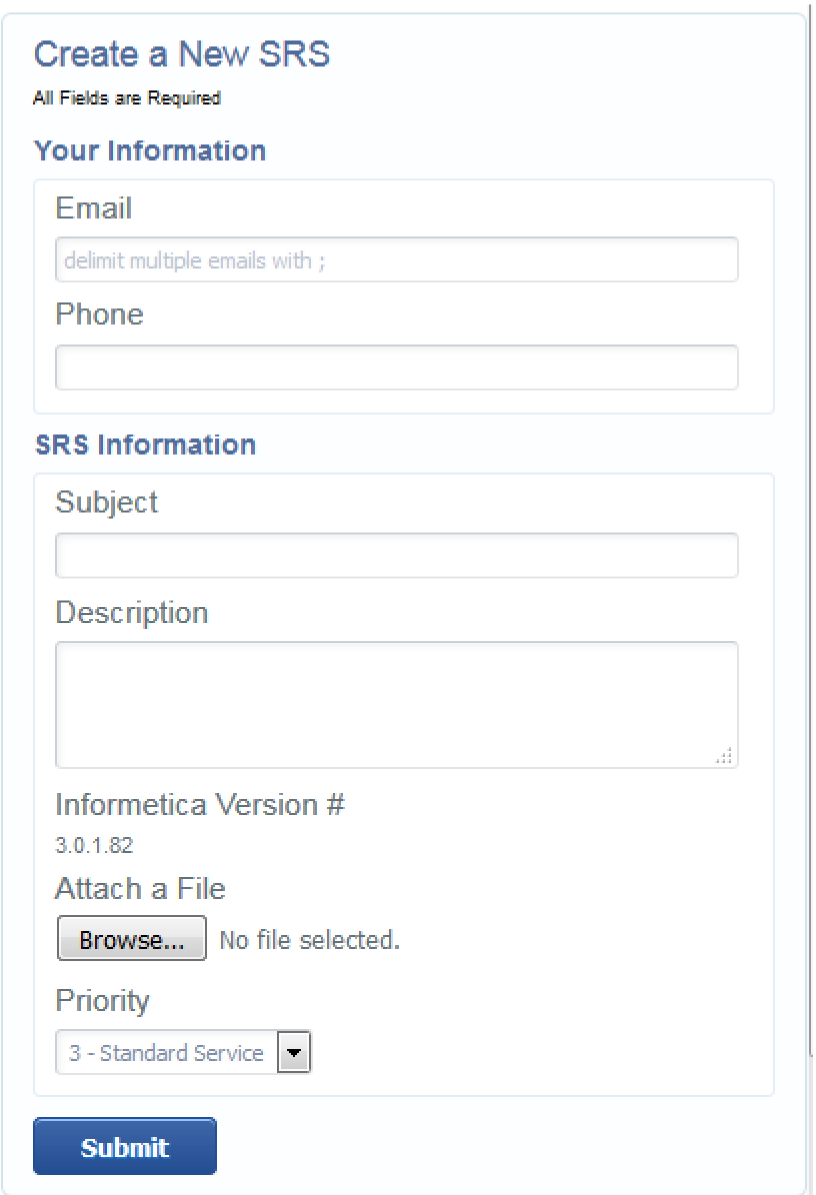
1. Log in with a Site Manager account.
2. Select **SRS Tool** under Support in the main navigation menu.



Create a Ticket

Prior to opening a new support request, you may want to filter to see if the issue or question you have has already been answered or if a similar problem has been reported and resolved that may assist you. If you are unable to find an answer, then open a new ticket.

1. Navigate to the SRS Tool .
2. Complete the form **Create a New SRS** located on theh right side of the page.



3. Enter your email address. You may add multiple emails if you want to include other people in your organization for ticket updates.
4. Enter the phone number where you may be contacted.
5. Enter a subject for the support request. This should be a short description of the purpose for the ticket.
6. Enter the description of your request. Include details and be as specific as possible.
7. Attaching a file, such as a detailed screenshot of an encountered issue, can help the support team when solving your issue. This step is optional.
8. Choose a priority for your request; there are three levels of priority that can be selected
    a. 3 - Standard Service is for normal requests.

   b. 2 - Priority Service should only be used in cases where a response is required as quickly as possible.
   c. 1 - Major Problem should only be used to indicate an emergency that needs immediate attention. This typically means that functionality is impeded and it is affecting your users.
9. Select **Submit**. when you are done creating the ticket to send the item to the support team.
10. You can update SRS tickets with an open status with more information and additional files. Enter more information into the Enter Additional Notes. Select Submit when you are done updating the ticket.

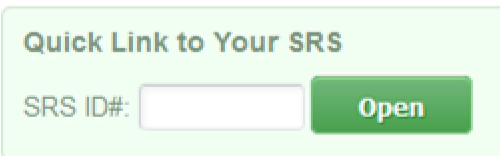
View and Respond to Tickets

When a ticket is being resolved, there will be communication back and forth. The support team may require clarification or answers to questions regarding your issue. The ticket will be put into a pending status while Suport waits for your response.

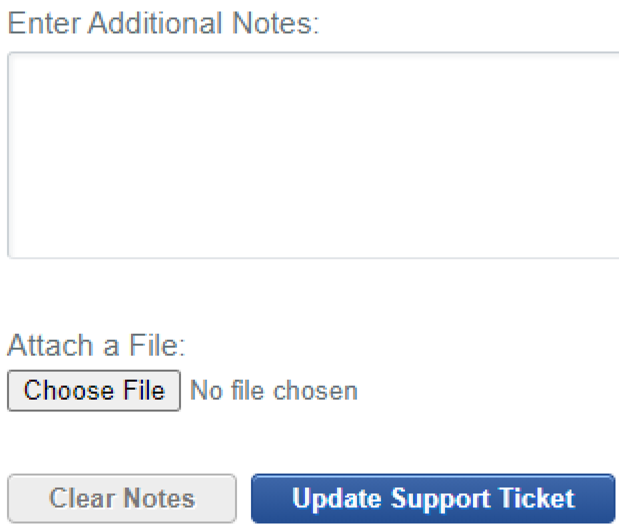
1. Navigate to the SRS Tool .
2. Select the ID or Subject for any item in the SRS Tool List to view details or respond to the ticket.

ID	Subject
16277	Accounts Generated within Date Range Report
11436	Unable to delete any campuses.

3. You can also view a ticket by entering the ticket's ID number into the SRS ID# field and then selecting **Open**.



4. Enter your response into the **Enter Additional Notes** field.



5. Optionally attach a file, such as a detailed screenshot of an encountered issue to help the support team when solving your issue.
6. Select **Update Support Ticket**.
7. Optionlly use filtering options to view specific tickets.
    a. Select the **Filter tab** and populate any of the filter fields available.
    b. Select the **Filter button** at the bottom of the available filter fields. The filtered results will show in the SRS Tool List.
8. Optionally export the ticket list to a CSV file. Select the CSV option after **Export As** at the top of the page.

Product Categories

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

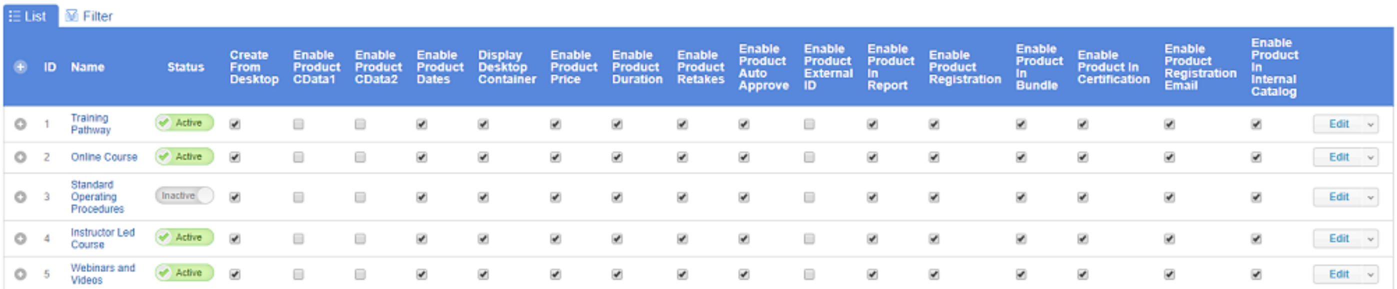
You can visually display products together under one category on home pages using category bundles.

1. Create a bundle.
2. Select **Category** from the **status** from the drop-down menu.
3. Select a **Type** from the drop-down menu.
4. **Save**.
5. Apply the category to one or more user groups. Follow the steps for Add or Remove User Groups .
6. Add the products that appear under the category. Follow the steps for Add or Remove Bundle Products .

Product Types

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

Up to 10 product types can enabled. Site Managers can create and edit the different product types as well as enable or disable the asset types available for creation within each product type. Products of the same type are grouped together into a container displayed on the home page. If a user has no enrolments for that type, the container will not appear on their home page.

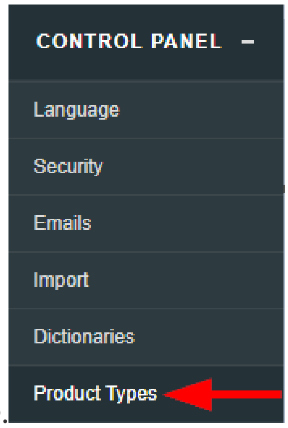

List Filter

ID	Name	Status	Create From Desktop	Enable Product CData1	Enable Product CData2	Enable Product Dates	Display Desktop Container	Enable Product Price	Enable Product Duration	Enable Product Retakes	Enable Product Auto Approve	Enable Product External ID	Enable Product In Report	Enable Product Registration	Enable Product In Bundle	Enable Product In Certification	Enable Product Registration Email	Enable Product In Internal Catalog	
1	Training Pathway	Active	☑	☐	☐	☑	☑	☑	☑	☑	☑	☐	☑	☑	☑	☑	☑	☑	Edit
2	Online Course	Active	☑	☐	☐	☑	☑	☑	☑	☑	☑	☐	☑	☑	☑	☑	☑	☑	Edit
3	Standard Operating Procedures	Inactive	☑	☐	☐	☑	☑	☑	☑	☑	☑	☐	☑	☑	☑	☑	☑	☑	Edit
4	Instructor Led Course	Active	☑	☐	☐	☑	☑	☑	☑	☑	☑	☐	☑	☑	☑	☑	☑	☑	Edit
5	Webinars and Videos	Active	☑	☐	☐	☑	☑	☑	☑	☑	☑	☐	☑	☑	☑	☑	☑	☑	Edit

Create and Define Product Types

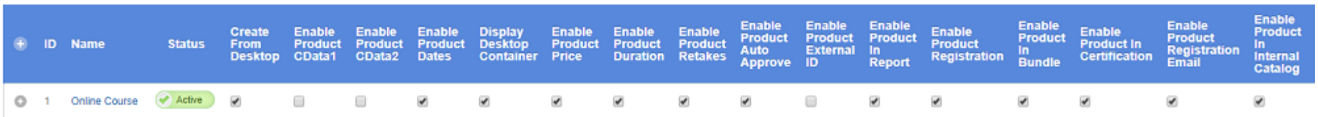
This feature is available to Site Managers depending on system configuration.

1. Create a Product Type Name
    a. Log in with a Site Manager account.



    b. Select **Product Types** from the Control Panel menu on the home page.
    c. Select **Create** from the Options menu. If you cannot see the menu, show the **Tool Panel** .
2. Fill out the form by with the new product type name, an optional short description, and set it to active or inactive. An active status allows creation of this product type. An inactive status disallows creation of this product type and makes any existing products of this type unavailable to enroled individuals. You can change these choices at any time by selecting edit for the applicable product type.

3. Select the fields available when creating or editing the product type. Insert a check mark for each allowable field.



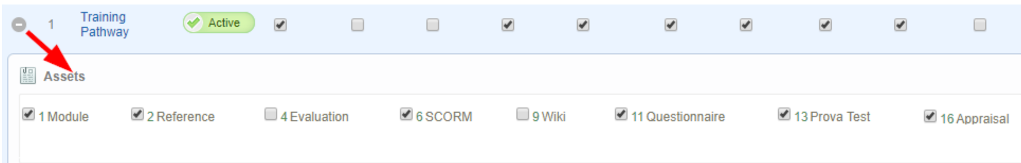
Field Descriptions

Field	Description
Create From Desktop	Allow course authors the ability to create this product type (e.g. Publishers). If not selected, then only Site Managers can create this product type.
Enable Product CData1/CData2	Show the custom input fields Data1 or Data2 in the product's Edit Details area.

Field	Description
Enable Product Dates	Allow the option to apply publishing dates.
Display Desktop Container	Make this product type appear in a container on the home page when logged in with non-site manager accounts.
Enable Product Price	Allow the option to enter a price. Note that this is not an eCommerce feature.
Enable Product Duration	Allow the option to apply an expiry.
Enable Product Retakes	Allow the option to allow retakes.
Enable Product Auto Approve	Places the Automatic Approval toggle on the product edit/create pages. This allows course authors to determine which products have automatic enrolment and which require supervisor approval. Note that this should not be enabled for systems that automatically enrol based on user group or use the eCommerce storefront feature.
Enable Product External ID	Show the External ID field in the product's Edit Details area.
Enable Product In Report	Allow this product type to be available in reports.
Enable Product Registration	Make the product type available for enrolment.

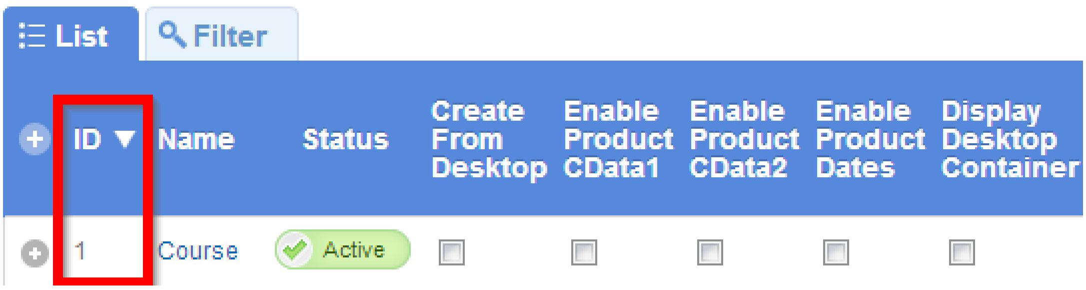
Field	Description
Enable Product In Bundle & Enable Product In Certifications	Allow this product type to be available in for bundles and certifications.
Enable Product Registration Email	Allow this product type to send product registration email alerts.
Enable Product in Internal Catalogue	Allow this product type to be shown or hidden from the course catalogue.

4. Expand the product type to define the assets available to this product. Insert a check mark for



each allowable asset.

5. Update the corresponding product type labels within dictionaries. The name created on the manage product types page does not change the default system name; you must also change the dictionary labels. The ID number on each product type identifies the label to define in the dictionary. The variable label names are as follow:
   - product_1, product_2, etc.
   - product_1_plural, product_2_plural, etc.



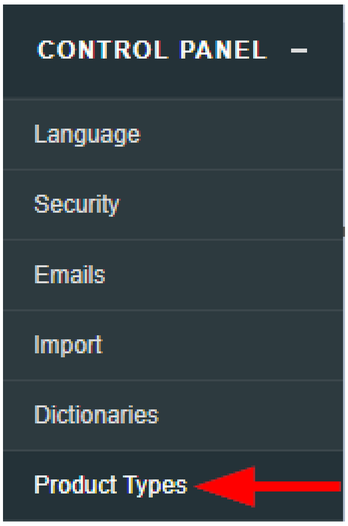
In this example, the course product type is ID 1.

The variable label, product_1, is defined as Course.

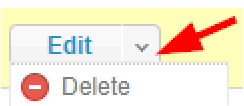
For more information on how to define dictionary labels, please see Languages and Dictionaries.

Delete Product Types

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

1. Log in with a Site Manager account.
2. Select Product Types from the Control Panel menu on the home page.
3. 

4. Select the drop-down arrow on the **Edit** button.
5. Select **Delete**.



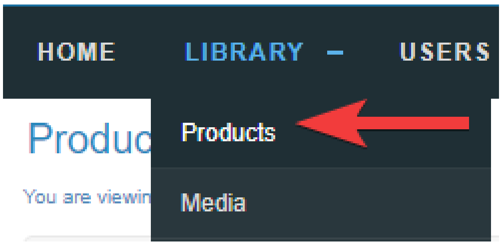
You can only delete product types that have no products attached to them.

If you try to delete a product type where products of that type exist, then the deletion tool will notify you that it cannot be deleted.

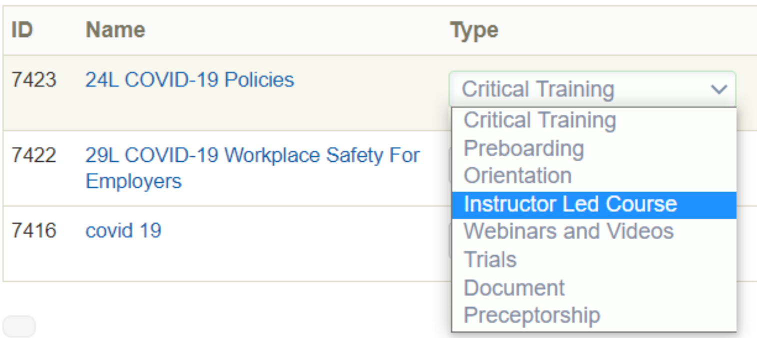
Change Product Type

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

1. Log in with a Site Manager account.
2. Select Products from the Library menu on the home page.



3. Select a different product type from the Type drop down menu for any given product.



There may be restrictions when changing a product type. This can occur when the destination type and the original type have very different configurations. The system will let you know if this is the case.

Product Revision Log

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

You can view the revisions that have been made to a specific product. The log identifies the name of the product or asset the date the change was made, who made the change, and what account type they are.

1. Navigate to products .
2. Select a specific product to open it.
3. Select **Revision Log** from the Properties menu. If you cannot see the menu, show the Tool Panel .

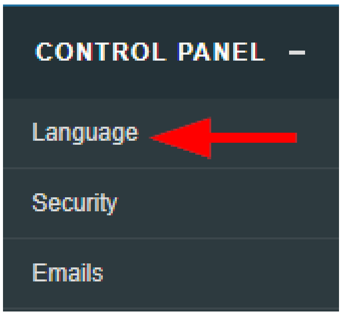
Languages and Dictionaries

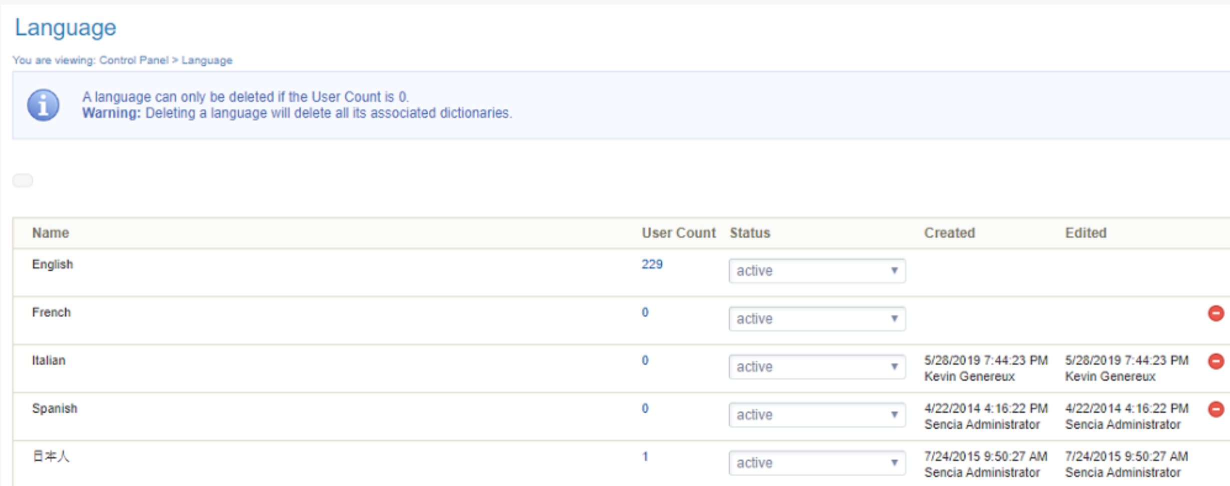
Site Managers can create system navigation and messages in multiple languages. Offering the system in several languages allows individuals to choose their preferred language.

Dictionaries allow a Site Manger to update system labels. Site Managers can create multiple dictionaries based on language. A dictionary contains a collection of labels used by the system to name items such as links, buttons, and features. A custom dictionary allows you to use familiar terminology instead of adapting to the system defaults.

Navigate to Languages

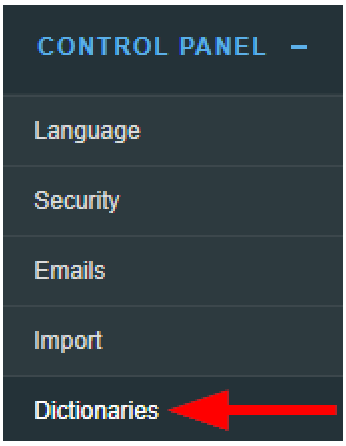
1. Log in with a Site Manager account.
2. Select **Langugue** from the Control Panel tab in the main navigation bar.



> The image below shows Language page.
>
> 
>

Navigate to Dictionaries

1. Log in with a Site Manager account.
2. Select **Dictionaries** from the Control Panel tab in the main navigation bar.



The image below shows the Dictionaries page.

Default Dictionaries

Name	Language	Description	User Count	Campus Count	Created	Edited	
English	English	This is the default English dictionary for all corporate employees.	136	58	7/23/2010 10:20:49 AM Sencia Administrator	3/29/2019 3:11:12 PM Sierra Trees	
Français	French	Default French	0	58	1/5/2011 11:19:20 AM Sencia Administrator	10/21/2015 11:16:44 AM Sencia Administrator	
Español	Spanish	Default Spanish	0	58	4/22/2014 4:16:23 PM Sencia Administrator	3/1/2016 12:02:36 PM Sierra Trees	
Japanese	日本人	Default Japanese	0	57	7/24/2015 9:50:27 AM Sencia Administrator	10/21/2015 11:16:44 AM Sencia Administrator	

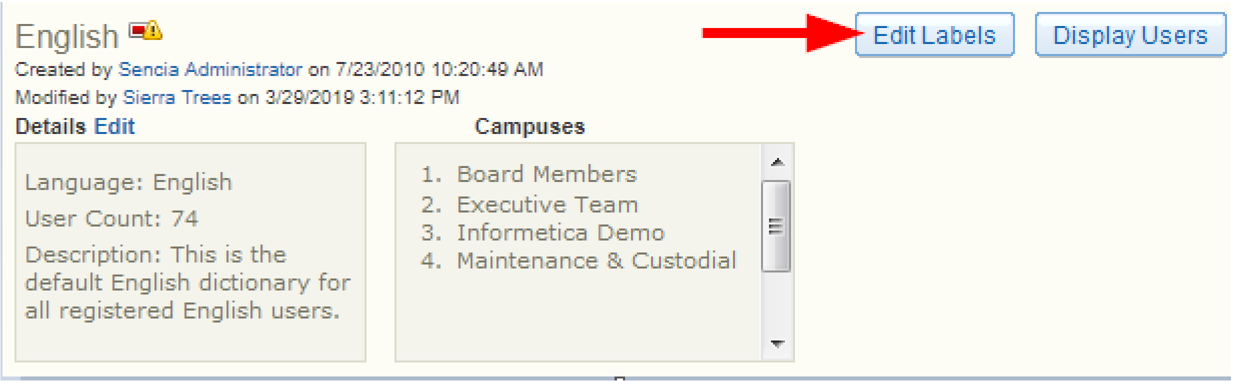
Edit Dictionaries

New labels are periodically added due to new development. Site Managers are responsible for keeping the dictionary labels tailored to their liking.

Select an edit method below.

Edit a Label in One Dictionary

1. Navigate to Dictionaries .
2. Select **Edit Labels** for the dictionary that contains the labels you want to update.

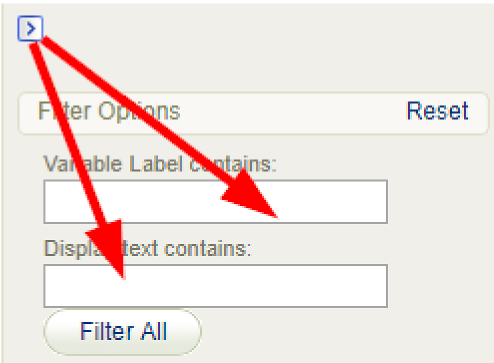
   

   Edit Labels from detailed view.

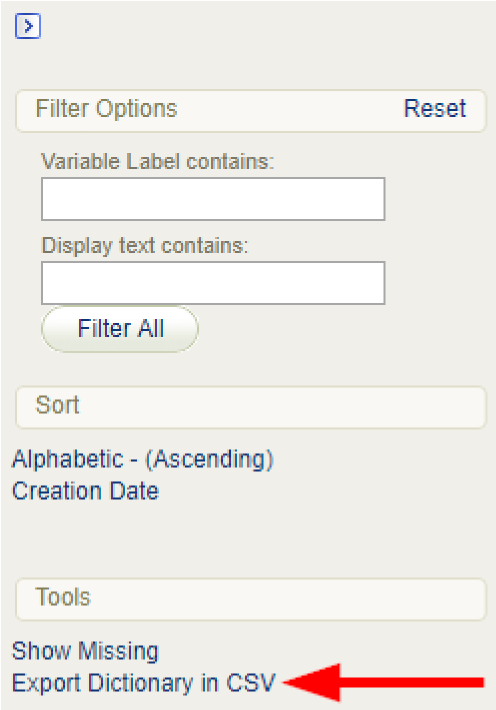
   

   Edit Labels from list view.

3. Optionally use the Filter Options to find a specific label. If you cannot see the menu, show the Tool Panel .

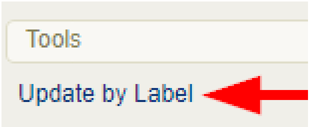
   

   - **Variable label contains**: Enter a word contained in the system label (e.g. "product" will present a list of system labels containing the term product). Variable labels are static and cannot be updated.
   - **isplay text contains**: Enter a word contained in the text for the label (e.g. enter the term “course” to view a list of labels using the term “course”). Display text can be udated.

4. Optionally select **Export Dictionary in CSV** from the Tool menu. This can help you translate the labels or send the file off to someone else to translate. If you cannot see the menu, show the Tool Panel . 

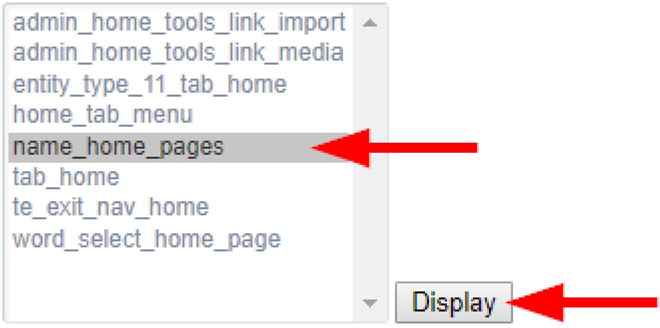
5. Select **Save and Finish** at the bottom of the page to keep the changes or **Cancel** to return to the dictionaries page without saving the changes. Saved changes are immediately visible in the system. You can save your work and return to updating the labels later.

Edit One Label in all Dictionaries

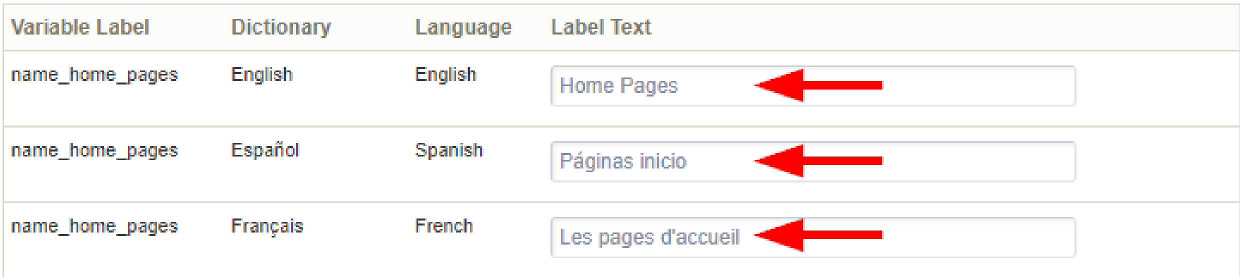
1. Navigate to Dictionaries .
2. Select **Update by Label** in the Tools menu. If you cannot see the menu, show the Tool Panel . 

3. Enter the exact label or a term used in a label into the **Filter Labels** field.

4. Select the label from the filtered list and then select **Display** to list the selected labels for editing. Use ctrl+click to select mulitple filters or shift+click to select all filters.



5. Enter the terms into the Label Text fields (see a Edit Label in One Dictionary above).



Variable Label	Dictionary	Language	Label Text
name_home_pages	English	English	Home Pages
name_home_pages	Español	Spanish	Páginas inicio
name_home_pages	Français	French	Les pages d'accueil

6. Select **Save and Finish** at the bottom of the page to keep the changes or **Cancel** to return to the dictionaries page without saving the changes. Saved changes are immediately visible in the system. You can save your work and return to updating the labels later.

Use the dictionary filter tool in one dictionary to find the system label that you need and then copy/paste it into the Filter Labels field (see Edit a Label in One Dictionary).

Find Missing Labels

Site Managers can filter dictionary labels to view only the lables that are not defined.

1. Navigate to Dictionaries .
2. Select the **Show Missing** icon for the applicable dictionary.

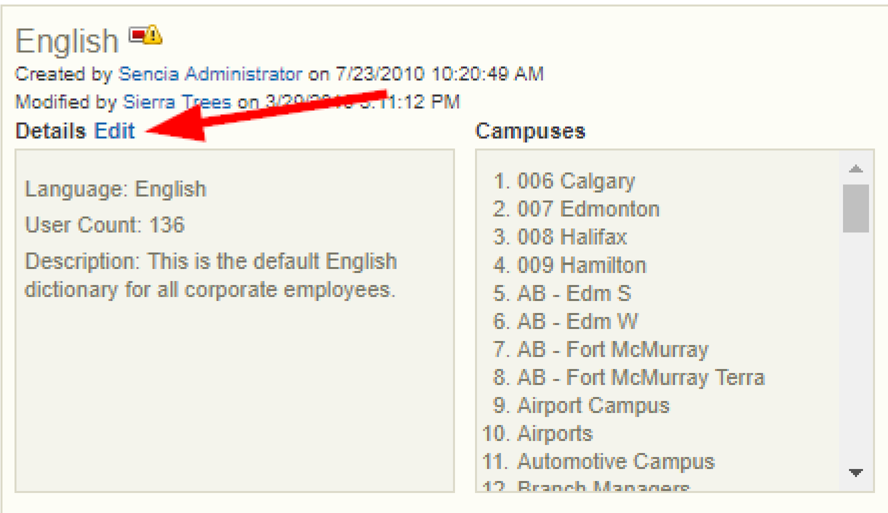
   

3. Enter a new term for each label displayed (see a Edit Label in One Dictionary above).
4. Select **Save and Finish** at the bottom of the page to keep the changes or **Cancel** to return to the dictionaries page without saving the changes. Saved changes are immediately visible in the system. You can save your work and return to updating the labels later.

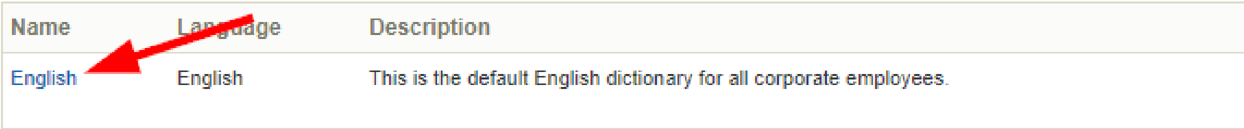
Edit Dictionary Name or Description

A dictionary name or dictionary description can be updated at any time.

1. Navigate to Dictionaries .
2. Select a dictionary name or Details Edit to change the name or description of the selected dictionary.

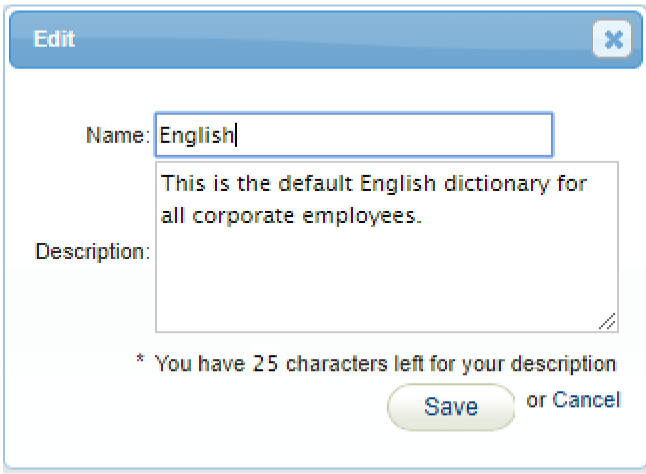
   

   Edit name or details from detailed view.



Edit name or details from list view.

3. In the edit screen, enter the new name and/or descripton into the fields. Descriptions can



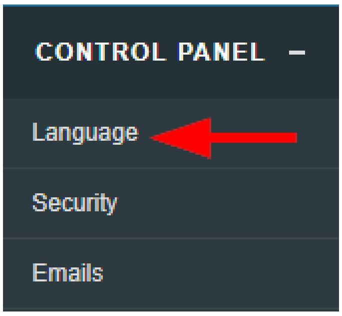
be 255 characters long.

4. Select **Save** to keep the changes or **Cancel** to return to the dictionaries page without saving the changes.

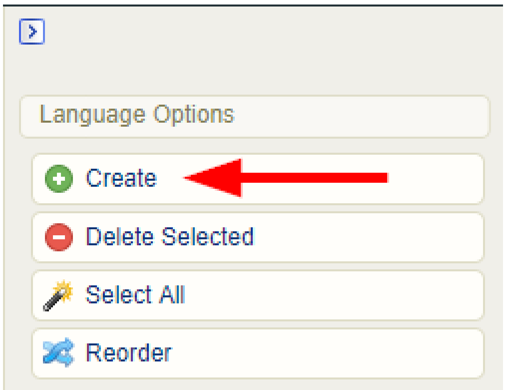
Create a New Language

Site Managers can create a new language. For each new language that is created, there is automatically one default dictionary generated that you can customize. A Site Manager may also opt to create any number of additional dictionaries for a language. (see Create a New Dictionary).

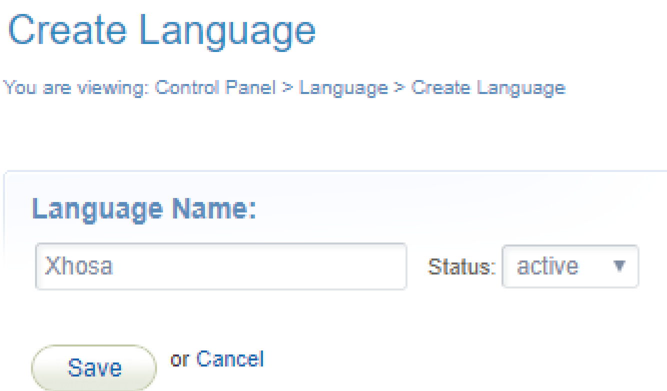
1. Log in with a Site Manager account.
2. Select **Language** from the control panel.



3. Select **Create** from the Language Options menu on the right side. If you cannot see the menu, show the Tool Panel .



4. Enter the Language Name and set the Status to active or inactive.



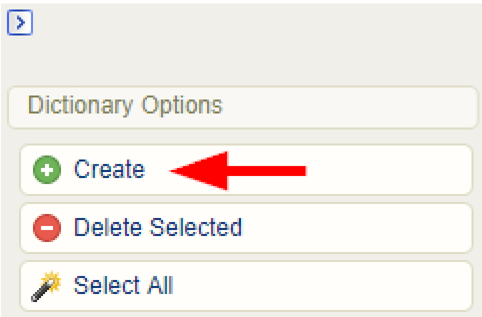
5. **Save**. For each new language that is created, a new dictionary is automatically generated. After saving you will be taken to the new dictionary so you can customize it.
6. Populate each dictionary label with new language terms (see Edit Dictionary Labels). You can save your work and return to the dictionary later via the Control Panel.
7. Optionally set up email notifications. Notifications for a new language are disabled, so a Site Manager must configure any email notifications (see Email Notifications topic in the Site Manager manual).

An active language is available to all campuses.

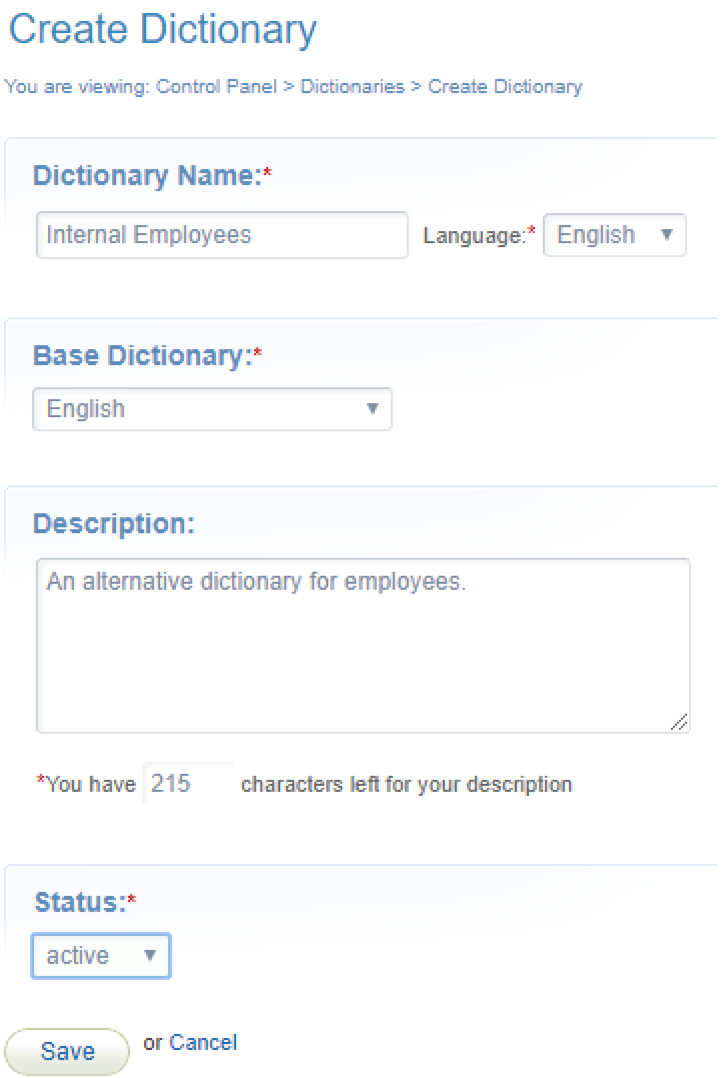
Create a New Dictionary

Site Managers can create a new dictionary without creating a new language. These are called additional dictionaries. Additional dictionaries are used to provide an alternate set of terms for any language (e.g. if your organization has both internal users and public users, you may want to have an alternate English dictionaries so that internal users see terminology that is familiar to their own environment and the public users see terminology that is more generally relevant to them).

1. Navigate to Dictionaries .
2. Select **Create** from the Dictionary Options menu on the right side. If you cannot see the menu, show the Tool Panel .



3. Complete the form.



   a. Enter the **Dictionary Name**.

   b. Use the **Language** drop-down menu to choose a language for the new dictionary.

   c. Use the **Base Dictionary** drop-down menu to choose a dictionary. The new dictionary will use the same labels as the selected base dictionary until you update them.

   d. Enter an optional **Description** of no more than 215 characters.

   e. Set the **Status** to active or inactive. Only active dictionaries can be accessed.

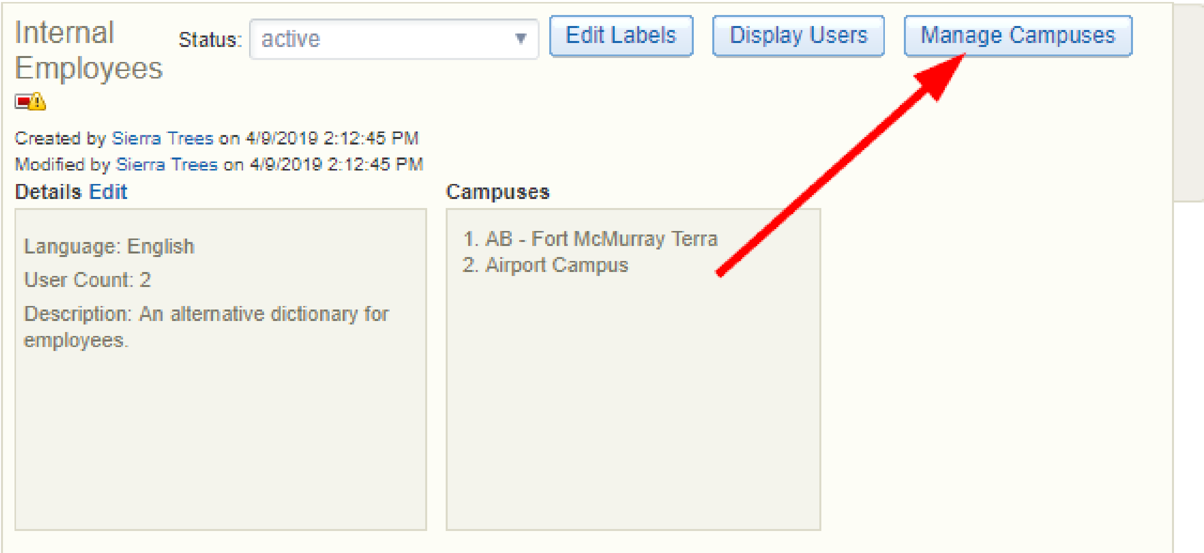
4. **Save**. After saving you will be taken to the dictionary labels so you can customize them.
5. Populate each dictionary label with new terms following the instructions in Edit Dictionaries . You can save your work and return to the dictionary later.
6. Assign the new dictionary to applicable campuses.

   a. From the Dictionaries page, scroll down to Additional Dictionaries and then select Campuses for the new dictionary.

b. **Add** the campuses that will use this dictionary.

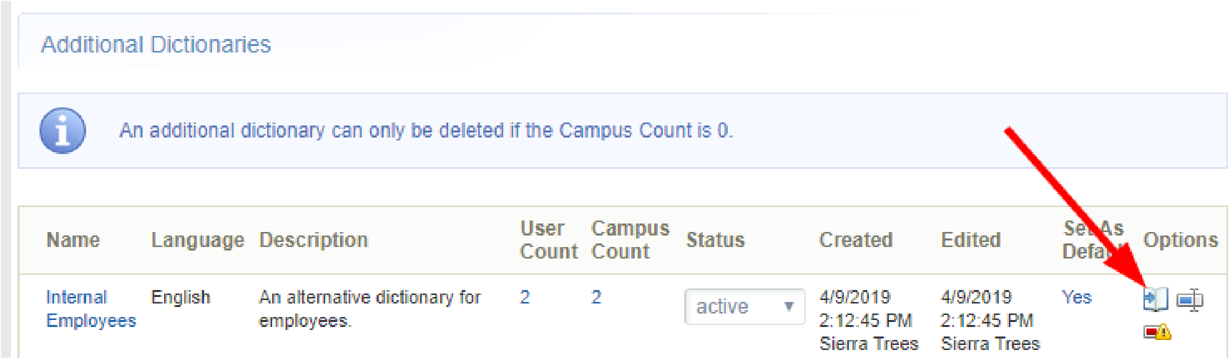
Add campuses from detailed view

.



Add campuses from list view

.



c. **Save.**

d. Optionally set up email notifications following the instructions in Email Notifications .

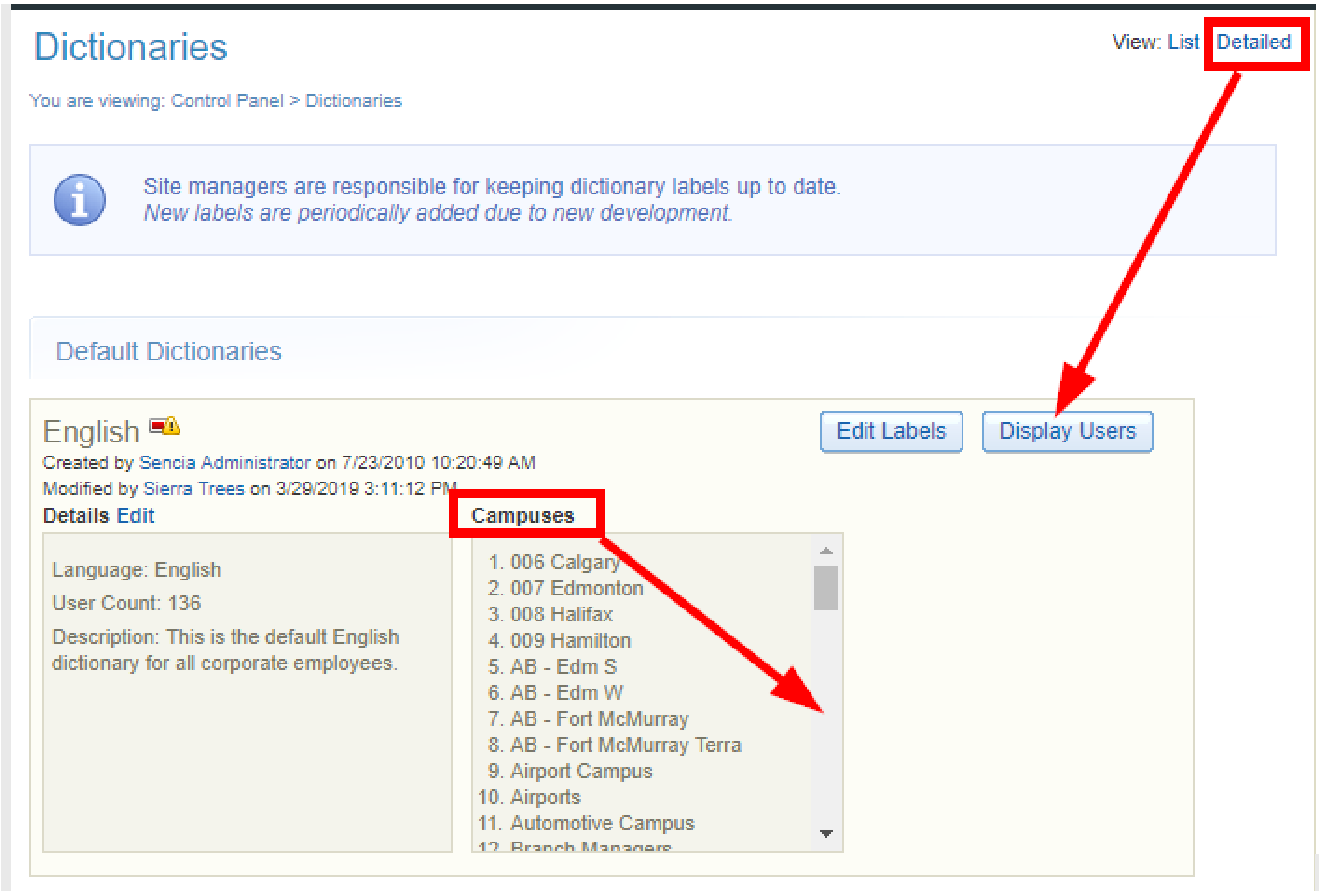
Display Dictionary Users

A Site Manager can view which campuses or accounts make use of a specific dictionary. This can be espcially useful when considering inactivating or deleting a language or dictionary.

1. Navigate to Dictionaries .
2. Select **Display Users** or **Campuses** for the applicable dictionary.

> Display users and view campuses from detailed view

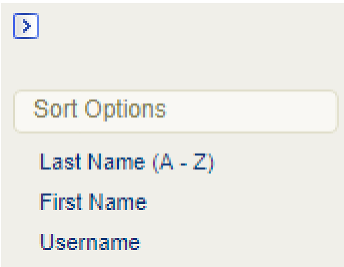
> .



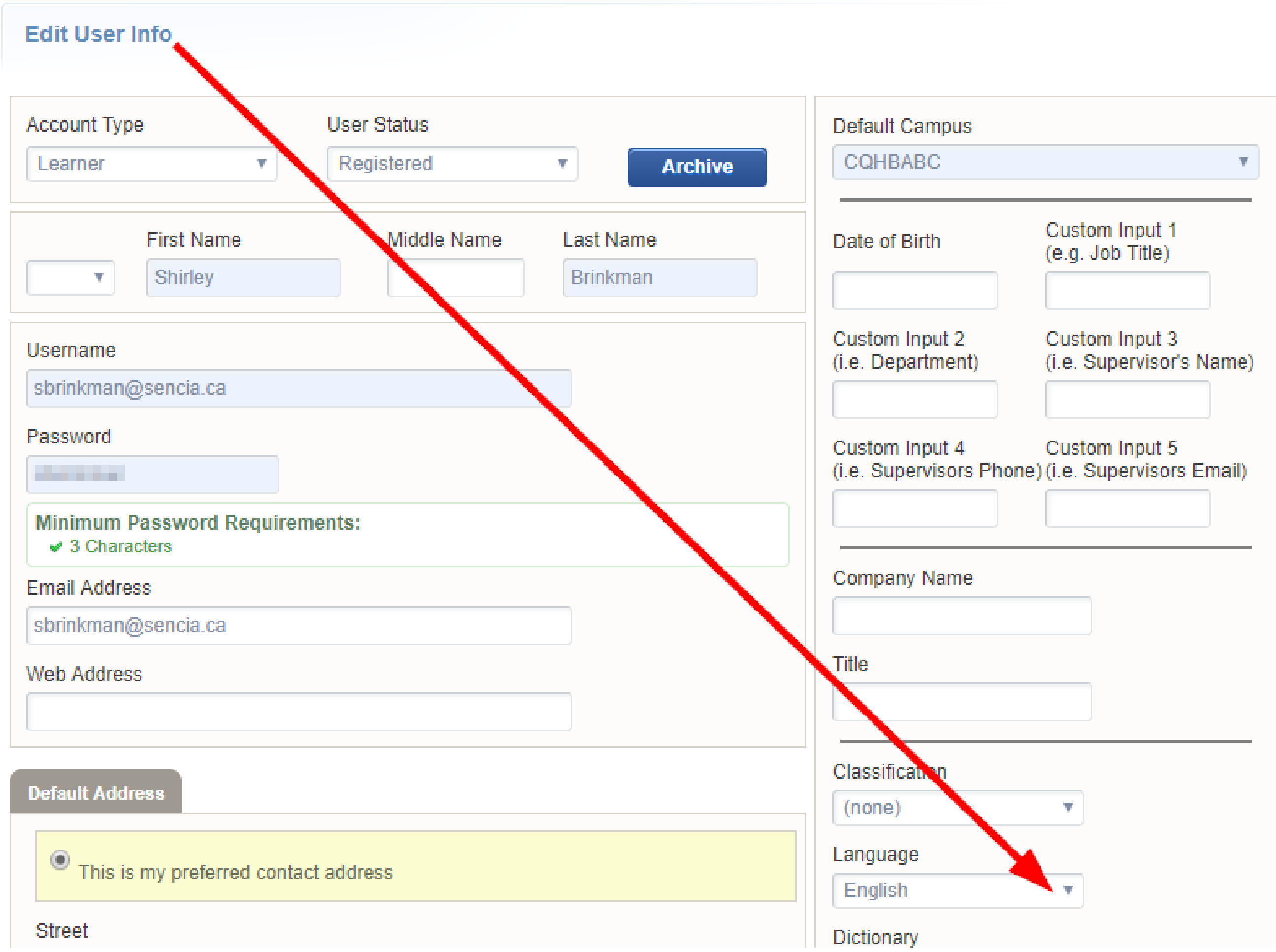
Display users and view campuses from list view

; the numbers are links.

3. Optionally use the sort options menu on the right to change how the user list is displayed. If you cannot see the menu, select the > arrow to open or close the menu.

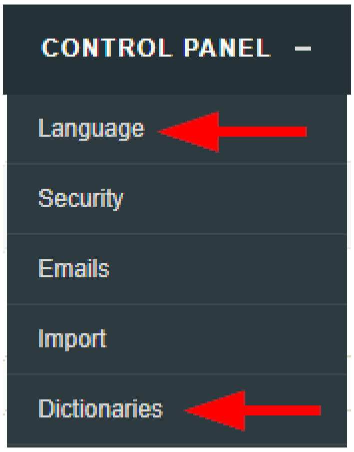


4. Optionally change an individual's language. Select a name on the display to open their profile page and then use the language the drop-down menu to select a new default language.



Deactivate a Language or Dictionary

1. Log in with a Site Manager account.
2. Languages and dictionaries cannot be deactivated if there are any campuses or individuals assigned. A Site Manager must first reassign a campus to another language and define a new language for these individuals within their profile before proceeding.
3. Navigate to **Language** or **Dictionaries** as applicable from the Control Panel tab.

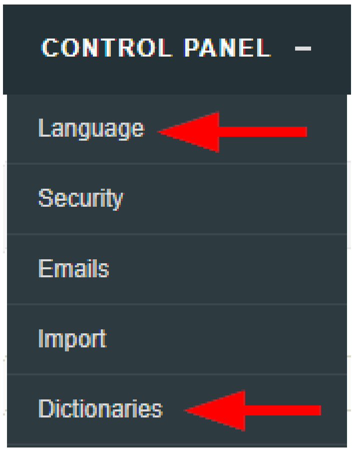


4. To deactivate a language, use the drop-down menu to change the status of the selected language to inactive.

Delete a Language/Dictionary

Languages and dictionaries (including additional dictionaries) cannot be deleted until organizations and users associated with the langauage or dictionary and are reassigned to a different dictionary.

1. Log in with a Site Manager account.
2. Navigate to **Language** or **Dictionaries** as applicable from the Control Panel tab. Deleting a language will permanently remove the associated default dictionary.



3. Select a language or dictionary. Only Additional Dictionaries can be deleted directly from the Dictionaries page.
4. Select **Delete Selected** from the Language Options or Dictionary Options menu to the right as applicable. A prompt will appear to confirm the deletion. If you cannot see the menu, select the > arrow to open or close the menu.

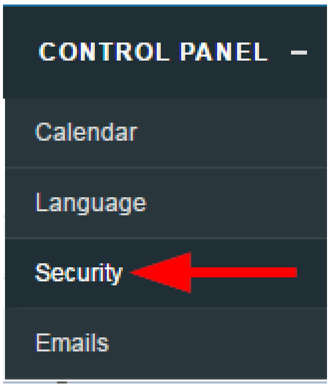
Deleting the language will permanently remove the associated dictionary.

Password Security

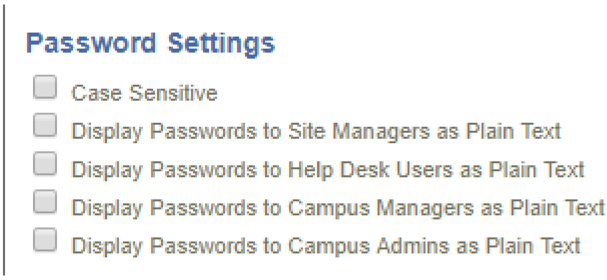
Site Managers can customize system password settings, such as requiring passwords with a minimum length. When users create their passwords, they will need to follow the requirements that you set up. If any security settings are altered to require a higher security, existing users will only be forced to update their passwords if the site is setup to enforce password security rules on login.

Password Settings

1. Log in with a Site Manager account.
2. Select **Security** under Control Panel in the main navigation menu.



3. Select the desired settings.



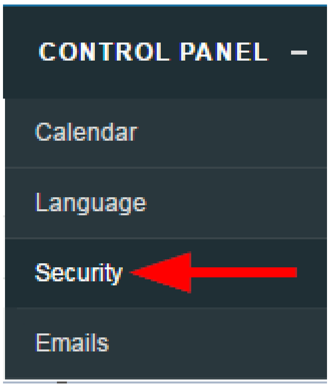
4. Choose **Case Sensitive** to require that passwords discriminate between uppercase and lowercase letters instead of allowing for either.
5. Choose which user types (if any) are allowed to view passwords as plain text. Plain text means that the stored passwords are unencrypted and can be easily read by the user types selected.
6. **Save**.

> Systems that have encrypted passwords cannot display passwords as plain text to all of the user types shown above.

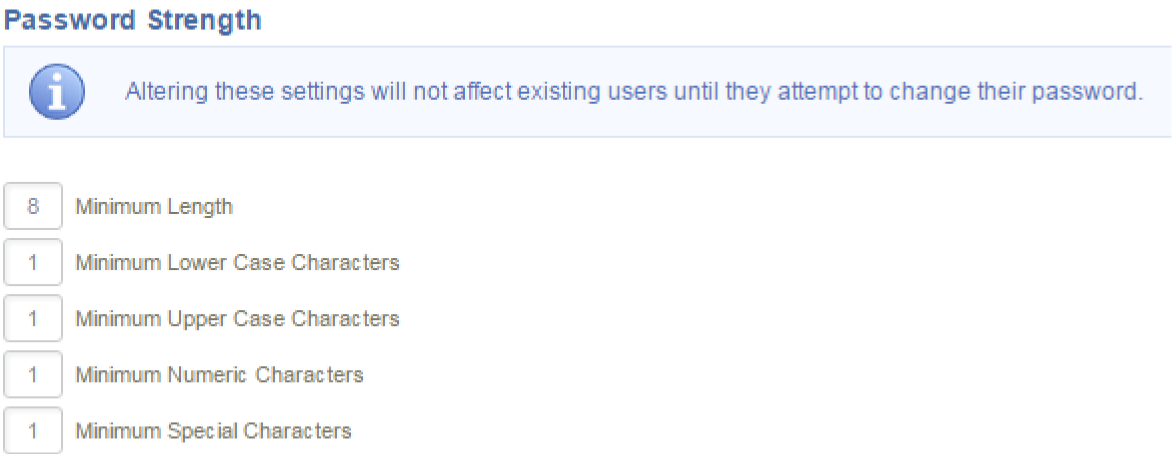
Password Strength

Site Managers can customize the requirements necessary for user passwords to strengthen the security for them. It is advised to balance the security of the password with consideration for the level of complication this will add for your users. Altering these settings will not affect existing users until they attempt to change their passwords.

1. Log in with a Site Manager account.
2. Select **Security** under Control Panel in the main navigation menu.

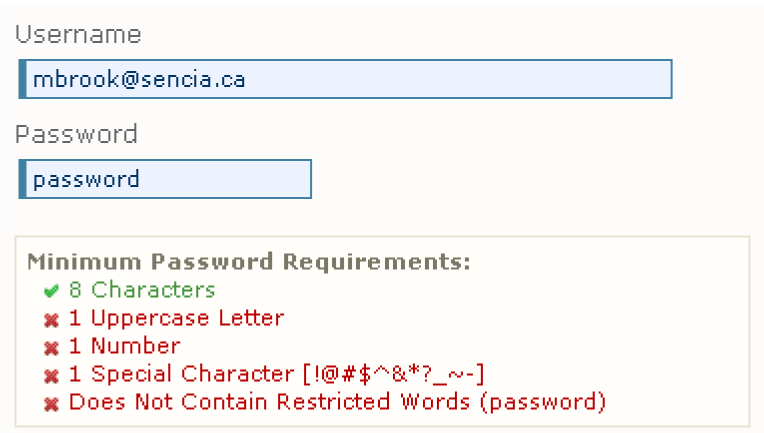


3. Enter a minimum number into the field next to each selection for the password requirement. For the lower case and upper case options, the Case Sensitive option is required for this selection. See Password Settings.



4. **Save**.

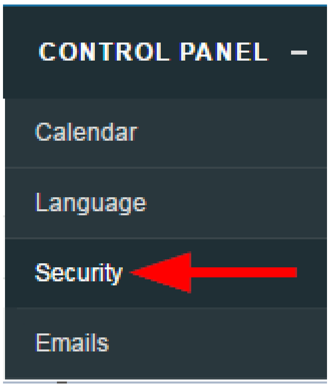
Password requirements display when a user creates a password. They are also visible from the user's profile page. Green lettering and a check mark indicate that the password meets requirements. Red lettering and an X indicate that the password does not meet requirements. The example below shows a user with both met and unmet password requirements.



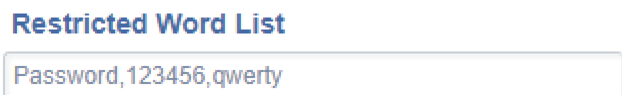
Restricted Word List

Site Managers can define characters, words, and phrases that cannot be used in passwords.

1. Log in with a Site Manager account.
2. Select **Security** under Control Panel in the main navigation menu.



3. Enter all restrictions into the field. Each entry much be seperated by a comma, without spaces.This feature ignores upper and lower case. An entry of 'cat' would not let users create passwords such as 'cat,'123Cat!', 'catalogue$$8', 'cattleprod'.

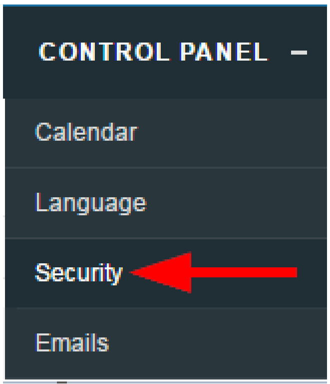


4. **Save**.

Forgot Password

Site Manager can define how the system will prompt users who select the Forgot Password link or who fail at their attempts to log in multiple times in a row.

1. Log in with a Site Manager account.
2. Select **Security** under Control Panel in the main navigation menu.

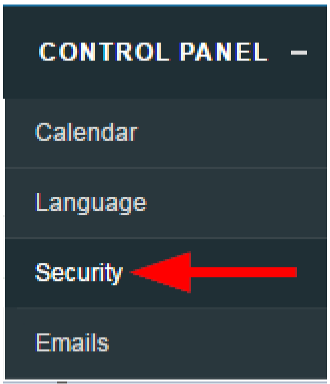


3. Select one option under Forgot or Change Password Email Option Setting.
    - **Change Password (Random) –** Activate this to email the user a new random password.
    - **Forgot Password –** Activate this option to email the user instructions for recovering their password.
4. **Save**.

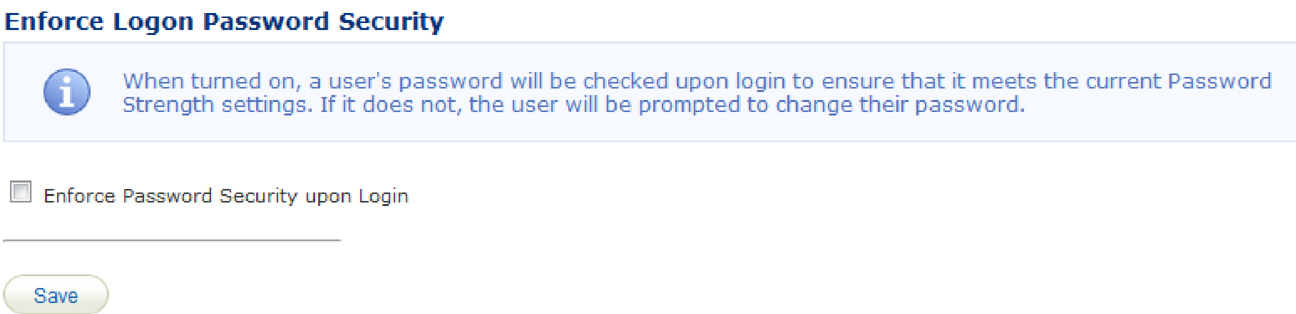
> Systems that use the Forgot Password link on the log in page trigger the option selected above when the link is selected.

Enforce Logon Password Security

1. Log in with a Site Manager account.
2. Select **Security** under Control Panel in the main navigation menu.



3. Enable **Enforce Logon Password Security** to check user's password upon login to ensure that it meets the current Password Strength settings. If it does not, the user will be prompted to change their password.



4. **Save**.

Profile Notes

This feature is available to Site Managers, Campus Admins, Campus Managers, and User Group Managers depending on system configuration.

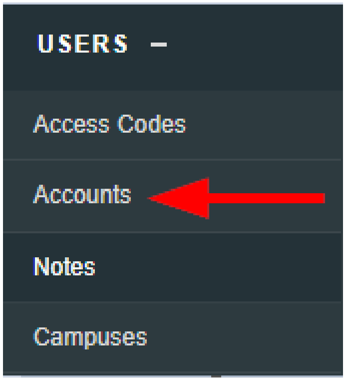
Private notes and associated attachments can be added to a user's profile. These notes can be viewed and edited by other admin accounts. Notes are accessed directly from a user's profile where you can create or manage notes for the selected account or from a manage page that shows all of the notes in the system. Up to 10 types of notes can be configured for your system.

Navigate to Notes

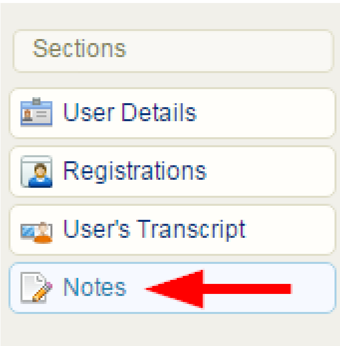
Select a navigation method below.

One Individual's Notes

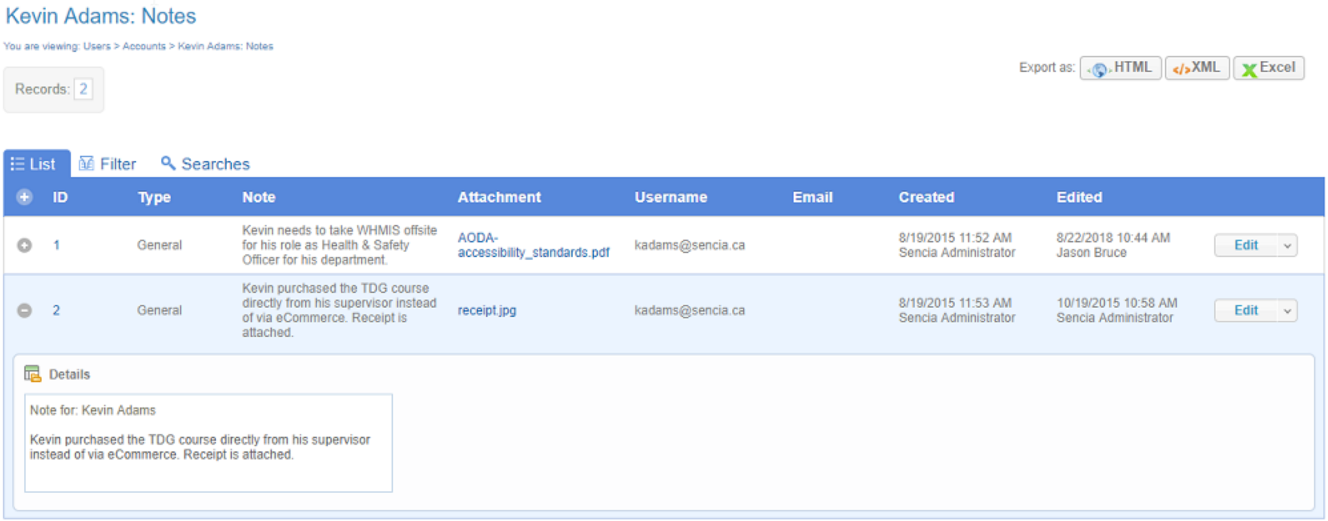
1. Log in with a Site Manager, Campus Admin, or Campus Manager account.
2. Select **Accounts** under Users in the main navigation menu.



3. Select an account name to open the user's profile.
4. Select Notes from the Sections menu. If you cannot see the menu, show the Tool Panel .

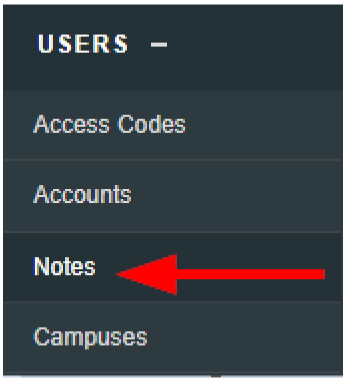


5. Optionally use Filter and Save Search or the username column to find specific notes.
6. Optionally Export the notes.
7. Expand a note to read the full note text (the list has a 100-character limit).



All Notes (Site Managers Only)

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

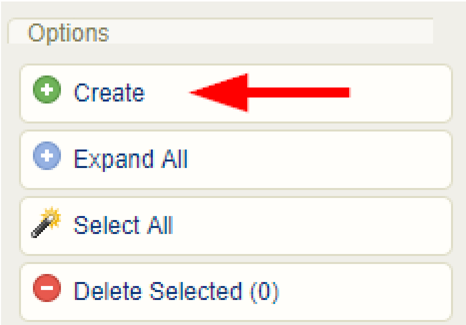


3. Optionally use Filter and Save Search or the username column to find specific notes.
4. Optionally Export the notes.
5. Expand a note to read the full note text (the list has a 100-character limit).

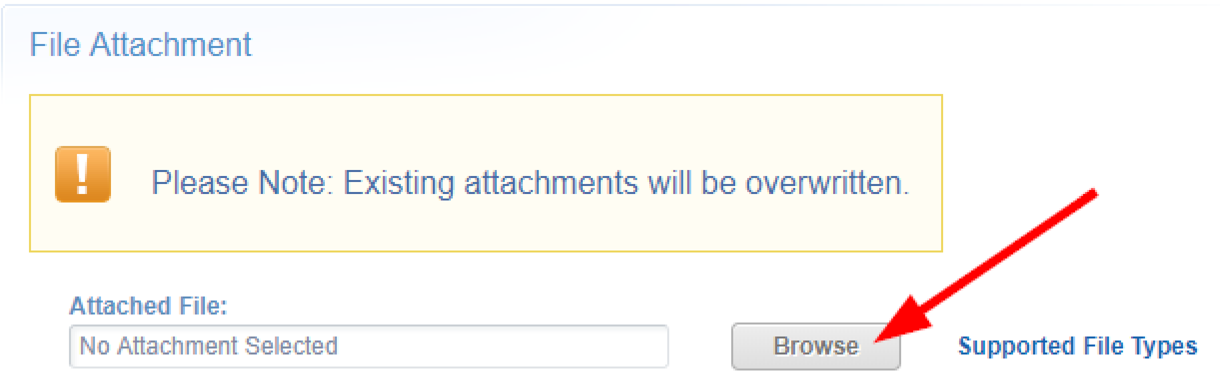
Create a Note

You must create new notes from a user's profile.

1. Navigate to the Indvidual's Notes .
2. Select **Create** from the options menu. If you cannot see the menu, show the Tool Panel .



3. Complete the form.
    a. Select the note type.
    b. Enter note text.
4. Optionally attach a file. Each note may have one attachment. Select **Browse** under the File Attachment section to select the file you want to attach to the note.



5. **Create**.

Delete Notes or Attachments

Deleted notes are permanently removed from the system. Deleting a note will also delete any attached file.

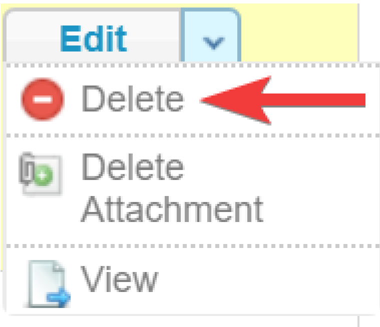
Delete Notes

Select a deletion method below.

Delete One at a Time

1. Navigate to Notes using either method.
2. Select the drop-down arrow on the note's **Edit** Split Button

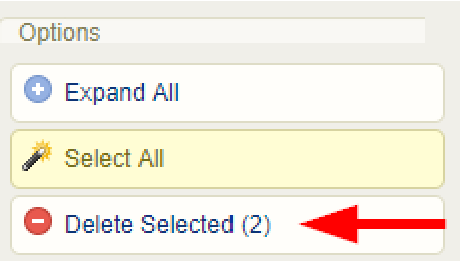
   .
3. Select **Delete**.



4. Answer **Yes** to confirm the deletion.

Delete Multiple Notes

1. Navigate to Notes using either method.
2. Select notes.
3. Select **Delete Selected** from the Options menu. If you cannot see the menu, show the Tool Panel .



4. Answer **Yes** to confirm the deletion.

Deleted attachments are permanently removed from the system.

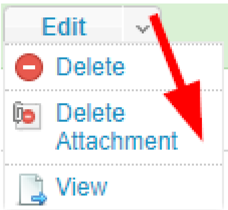
Delete Note Attachment

A file attachment associated to a note can be removed without deleting the note.

1. Navigate to Notes using either method.
2. Select the drop-down arrow on the note's **Edit** Split Button

   .

3. Select **Delete Attachment**.



4. Answer **Yes** to confirm the deletion.

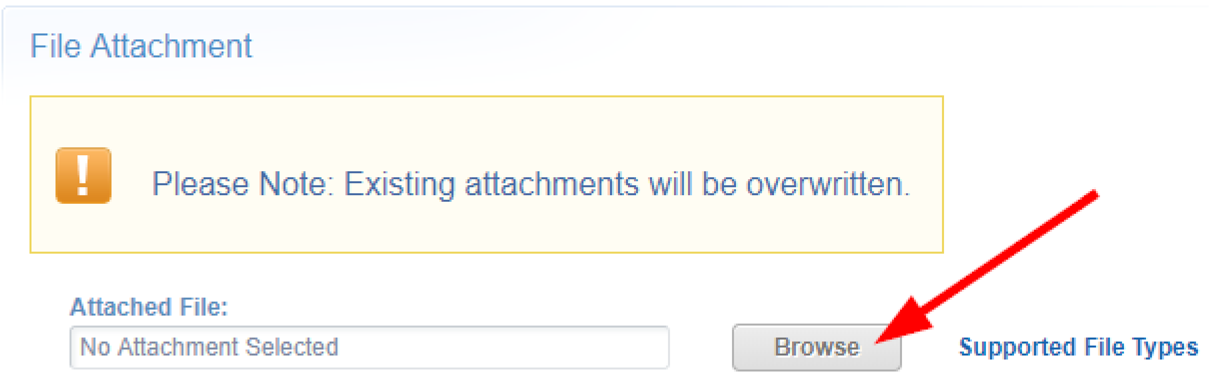
Edit a Note or Attachment

Edit Note Text

1. Navigate to Notes using either method.
2. Select the **Edit** button next to the applicable note.
3. Make the changes to the note text.
4. **Save**.

Edit a Note Attachment

You can upload a new file to replace a note attachment or overwrite the exisiting attachment. To overwrite the file, ensure that the new file name is exactly the same as the current file attachment.

1. Navigate to Notes using either method.
2. Select the **Edit** button next to the applicable note.
3. Select **Browse** under the File Attachment section to select the file you want to attach to the


note.
4. **Save**.

Each note may only have one attachment.

Search Behaviour

By default, most users will see search results based on what their enrolments for active assets statuses. Active asset statuses include: active, popup, overview only, and hidden. Note that the hidden status has a LMS configuration option to hide these from search results for all desktop users.

- Site Managers can search for any content, regardless of status.
- User type 1 (e.g., Participant) can search for enroled content an can see active product/asset statuses.
- User types 3 and 4 (e.g., Publish and Instructor) can search for enroled content and can see all product/asset statuses.
- User type 5 (e.g., User Group Manager) can search for any product/asset content in their own group and can see all active product/asset statuses, regardless of enrolment. User must be enroled to launch the product from the search link.
- User type 6 (e.g., Campus level manager) can search for assets/products in their own campuses and can see all active product/asset statuses. User must be enroled to launch the product from the search link.
- User Type 13 (e.g., Campus Admin) can search and launch on all products/assets in their own campuses, regardless of asset status.