Infor Learning Management Soho Xi Manager Guide

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About this guide

his guide provides detailed instructions for the Infor Learning Management User Manager application and user functions to apply changes to managed users.

Contacting Infor

If you have questions about Infor products, go to the Infor Support Portal at https://support.infor.com/.

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1 Overview

1

The browser-based Infor Learning Management SoHo Xi Manager application is used by managers to manage users, manage enrollments, and course history and manage approval requests.

Chapter 2 Setup and configuration

2

Signing in to LMS as Manager

Depending upon your access rights, you may be able to access all or some of the functions within Infor Learning Management User Manager.

To log on to Infor Learning Management Manager role:

1. Specify the server URL.
2. Enter your login name and password.
3. Click **Login** button.
4. If your organization has multiple portals, select the portal from the **Portal Selector** list and click **Go**.
5. Select **Manager** role from the role selector list.

Dashboard

Depending on the configuration of the designer, a manager's Dashboard displays widgets that provide easy access to the manager. There are different kinds of widgets that can be enabled:

- Employee Snapshot
- Announcement
- Ad Hoc Reports

Employee Snapshot

All employees currently managed by the manager is displayed. A maximize button is available to display the employees in a separate window. Options to sort the employees by last name, first name or status can also be applied in the widget.

Announcement

It is a read-only placeholder for important communication in the organization such as announcements. Maximize button is available to display the announcement in a separate window.

Ad Hoc Reports

Depending on the ad hoc report enabled by the designer, a manager has the capability to view various types of ad hoc reports in a manager's dashboard. Below are the features when this widget is enabled:

- Load the ad hoc report on a separate window by clicking the maximize button
- Print ad hoc report in HTML format or PDF format
- Export ad hoc report to MS Excel, MS Word, CSV, and XML file formats
- Manipulate the display of results in the report by 1, 10, 100, 1000, 10000 and show all
- Narrow down the results by entering criteria in the built-in filter of the ad hoc report

Employees

Employees page displays all users currently handled by the manager. Each tile or list on the page displays details of a user such as:

- Name
- Email
- Role
- Employee ID
- Job Title
- Completed Courses
- Percentage indicator of completed courses

Filtering employees

Manager has the option to narrow down the employees displayed by any of the following:

1. On search box, enter a first name, last name or email of a user. Page will automatically narrow down the list of courses displayed.
2. Select from the **Active** drop down then click **Apply** button to filter out active or inactive user accounts.

3 **Reset** button clears the search criteria entered. Same goes with the **Clear All** bubble button located on the upper part of the page.

Sorting employees

On the upper right corner of the page, sorting options are available so that manager can sort all employees through:

- First name (A-Z or vice versa)
- Last name (A-Z or vice versa)
- Status

Employee Details Page

Employee details page is navigated when an employee tile or list is clicked. A new page is displayed on the page which shows the following:

- Profile section
  - Displays the information about the user
  - Links provided to navigate further to a user's assigned courses, certification program and transcript
- Courses section
  - Displays the courses assigned to the user
  - Displays the total number of courses assigned to the user
  - Assign Credit to Employee button
  - Reset Employee Course Data button
  - Cancel Enrollment button
- Certification Programs section
  - Displays the certification programs assigned to the user
  - Displays the total number of certification programs assigned to the user
  - Requirements
- Course Statistics section

Viewing assigned courses

1 As manager, navigate to **Employees.** Click a user tile or list to open **Employee** Details page.

2 From the **Profile** section, click the **View Assigned Courses** link.

3 This loads another page that displays all courses assigned to the employee including the status.

Enrolling a user

Depending on the permission, manager may be able to enroll managed users to a course and events through the **Employees** menu. There are three ways under **Employees** page to enroll a user to a course.

Entry point no. 1: Enrolling a user through the Employees landing page

1 Navigate to **Employees** page.

2 Each employee tile or list in the page has a plus icon which has a tooltip of **Enroll Employee**. Click the icon to open **Add Courses** pop-up window.

3 Verify the courses and/or events you want to assign to the employee. On the search box provided, you may enter a course name to narrow down the list of courses.

4 Navigate the list by clicking the pagination as well as the next and back buttons located on the bottom part of the pop-up screen.

5 After selection, click **OK**. This automatically closes the window. Navigate to **View Assigned Courses** page to verify that user is successfully enrolled to the course.

Entry point no. 2: Enrolling a user via Employees Details page

1 Navigate to **Employees** > **Employee Details**.

2 On the **Profile** section, click the **Add New Course** link. This will open **Add Courses** pop-up window.

3 Verify the courses and/or events you want to assign to the employee. On the search box provided, you may enter a course name to narrow down the list of courses.

4 After selection, click **OK** to close the window. A confirmation message is displayed that learner is registered to the course successfully.

5 The **Course** section of **Employee Details** page must automatically update with the new count. The newly added course is also reflected in the course list.

Entry point no. 3: Enrolling a user via View Assigned Courses page

1. Navigate to **Employees** > **Employee Details** > **View Assigned Courses**.
2. On the upper right corner of the page, click the plus button to load **Add Courses** pop-up window.
3. Check the courses and/or events you want to assign to the employee. On the search box provided, you may enter a course name to narrow down the list of courses.
4. After selection, click **OK** to close the window. A confirmation message is displayed that learner is registered to the course successfully.
5. The page must automatically display the new course that has just been added.

Assigning credit to employee

Depending on the permission, manager may be able to assign credits to managed users. There are two ways to assign credits to employee.

Entry point no. 1: Assigning credits via Employee Details page

1. Navigate to **Employees** > **Employee Details**.
2. On **Courses** section, click the checkbox icon that corresponds to the course of the user you want to apply credits to. On mouse hover, it has tooltip of **Assign Credit to Employee**.
3. A confirmation is displayed that credits are successfully applied.

Entry point no. 2: Assigning credits via View Assigned Courses page

1. Navigate to **Employees** > **Employee Details** > **View Assigned Courses**.
2. Select the course you want to apply credits.
3. Click the checkbox icon located in the course tile or list.
4. A confirmation is displayed that credits are successfully applied.

Resetting employee course data

There are two ways to reset employee course data.

Entry point no. 1: Reset data via Employee Details page

1. Navigate to **Employees** > **Employee Details**.
2. On Courses section, click the refresh icon that corresponds to the course of the user you want to reset. On mouse hover, it has tooltip of Reset Employee Course Data.
3. On **Reset Activity and Scores** pop-up screen, check all the options that apply.
4. Click **Reset** button. A confirmation message is displayed that reset is successful.

Entry point no. 2: Reset data via View Assigned Courses page

1. Navigate to **Employees** > **Employee Details** > **View Assigned Courses**.
2. After locating the course, you want to reset. Click the check box icon located in the course tile or list.
3. On **Reset Activity and Scores** pop-up screen, select all the options that apply.
4. Click **Reset** button. A confirmation message is displayed that reset is successful.

Cancelling enrollment

Depending on the permission, manager may be able to cancel enrollment of managed users. There are two ways to cancel user enrollment.

Entry point no. 1: Cancel enrollment via Employee Details page

1. Navigate to **Employees** > **Employee Details**.
2. On **Courses** section, click the cancel icon that corresponds to the course. On mouse hover, it has tooltip of **Cancel Enrollment**.
3. **Remove User from Course** pop-up message is displayed. Click **OK**.
4. A confirmation message is displayed that cancellation is successful.

Entry point no. 2: Cancel enrollment via View Assigned Courses page

1. Navigate to **Employees** > **Employee Details** > **View Assigned Courses**.

2 After locating the course you want to cancel, click the cancel icon located in the course tile or list.

3 **Remove User from Course** pop-up message is displayed. Click **OK**.

4 A confirmation message is displayed that cancellation is successful.

Viewing assigned certification programs

1 Navigate to **Employees** > **Employee Details**.

2 On Profile section, click the **View Assigned Certification Programs** link. A new page will be displayed containing all the certification assigned to the user.

Viewing transcript

1 Navigate to **Employees > Employee Details** page of a specific user.

2 On **Profile** section, click the **View Transcript** link. This will automatically display the employee's transcript.

Courses

This page displays all the courses that are available and/or assigned to all employees being managed by the manager. Through this page, the manager can enroll a user to courses and events, reset activity and scores of a user and cancel an enrollment.

To view **Courses** page, administrator must grant the manager the permission to view courses.

To navigate to **Courses** page:

1 Log in as manager.

2 Click **Courses** menu from the left-most pane. This will display Courses landing page.

Filtering courses

Manager has the option to narrow down the courses displayed by any of the following:

1 On search box, enter a course name or a description of a course. Page will automatically narrow down the list of courses displayed.

2 Select from the **Active** drop down then click **Apply** button to filter out active courses or inactive courses.

3 Select from the **Type** dropdown list then click **Apply** button to specify which courses type are to be displayed in the page.

4 Use **Advanced Filter** to search courses by common fields and static fields such as Credits, Date Created among others.

Enrolling a user

Depending on the permission, manager may be able to enroll managed users to a course and events.

1 From **Courses** page, select the course you want to the users to be enrolled to. This will load a separate page that displays all eligible users for enrollment.

2 On the upper right corner of the page, click the plus (+) icon. This will load **Enroll Users in Courses/Events** pop-up screen.

3 When selecting the event, you have option to **Let user choose event** which will enroll a user to the course but not to a specific event.

4 Tick **Show all current and future events** if you want to specify the available events the user must be enrolled.

5 After selecting the event, click **Next**. This will load all users eligible for the enrollment.

6 Select users then click **Enroll**. System shows that user is successfully added to the course.

Assigning credit to a user

1 From **Courses** page, select the course where the user is enrolled.

2 Locate the user you want to assign credits to. You may use the **Status**, **Active** and/or **Advanced Filters** to narrow down the list of users.

3 On the user tile, click the checkbox icon. On mouse hover, it displays **Assign credit to employee** tooltip. This will automatically apply credits to user. Status also changes to **Passed**.

Resetting activity and score of a user

1 From **Courses** page, select the course where the user is enrolled.

2 Locate the user you want to reset.

3 Click the reset icon. On mouse hover, it displays **Reset Employee Course Data** tooltip.

4 On **Reset Activity and Scores** message box, select the type of reset you want to apply then click **Reset** button.

Resetting activity and score of users in bulk

1. After the course is selected, on the upper right corner of the page, click the reset icon.
2. It adds checkboxes on each user tile/list. Select multiple users as necessary.
3. After selection, click the **Reset Activity and Scores** button.
4. On **Reset Activity and Scores** message box, select the type of reset you want to apply then click **Reset** button.

Cancelling user enrollment

1. From **Courses** page, select the course where the user is enrolled.
2. Locate the user you want to cancel from the enrollment.
3. On the user tile, click the cancel icon. To verify, the icon displays **Cancel Enrollment** tooltip on mouse hover.
4. On **Remove User from Course** message box, click **OK**. Page automatically refreshes and the user is removed from the list.

Cancelling user enrollment in bulk

After the course is selected, on the upper right corner of the page, click the cancel icon.

1. It adds checkboxes on each user tile/list. Select multiple users as necessary.
2. After selection, click the **Cancel Enrollment** button.
3. On **Remove User from Course** message box, click **OK**. Page automatically refreshes and the user is removed from the list.

Approvals

When a learner registers to an event, on which the event requires manager approval, the request appears on **Approvals** page. There are two types to view this **Approvals** page: (1) Group by Users and (2) Group by Courses. These options are available on the upper right corner of the page.

To navigate to **Approvals** page:

1 Log in as manager.

2 Click **Approvals** menu from the left-most pane. This will display **Approvals** landing page.

3 Each item reflects the employee name who initiated the request, course name, event name, event dates, course type, available seats, and status.

Approving course/event registration request

1 Locate the tile or list you want to approve.

2 Click the check button that corresponds to the selected item.

3 On **Registration Request** message box, select **OK**. This automatically approves the request. It is expected that the item is hidden upon page refresh.

Denying course/event registration request

1 Locate the tile or list you want to approve.

2 Click the cancel/deny button that corresponds to the selected item.

3 On **Deny Registration Request** message box, select **OK**. This automatically rejects the request. It is expected that the item is hidden upon page refresh.

Approve Outside Credits

This page displays outside credits filed by user being managed. When user added outside credits via Transcript page, and the credits need manager approval, the request automatically appears on **Approve Outside Credits** page.

To navigate to Approve Outside Credits page:

1 Log in as manager.

2 Click **Approve Outside Credits** menu from the left-most pane. This will display **Approve Outside Credits** landing page.

Approving outside credits

1. On **Approve Outside Credits** page, locate the credit for approval filed by the learner.
2. Click the check button that corresponds to the selected item.
3. On **Approve Outside Credit** message box, enter your comment then select **OK**. This automatically approves the request. It is expected that the item is hidden upon page refresh.

Denying outside credits

1. On **Approve Outside Credits** page, locate the credit for approval filed by the learner.
2. Click the check button that corresponds to the selected item.
3. On **Deny Outside Credit** message box, enter your comment then select **OK**. This automatically approves the request. It is expected that the item is hidden upon page refresh.

Reports

Depends on the configured reports available to a manager account, Reports page provides access to those reports.

To navigate to **Reports** page:

1. Log in as manager.
2. Click **Reports** menu from the left-most pane. This will display **Reports** landing page.

Viewing reports

1. All the reports a manager has access to must be readily displayed on the page.
2. Click the name of the report you want to open. This will load a new page.
3. Update the **Filters** and **Fields** tabs according to your preference.
4. On the toolbar, you can do the following:
    - Print the report to HTML or PDF format
    - Export the report to Word, Excel, XML and CSV formats
    - Manipulate the number of items displayed on a page

Social Learning

This page is a social learning platform/community.

To navigate to **Social Learning** page:

1. Log in as manager.
2. Click **Social Learning** menu from the left-most pane. This will display **Social Learning** landing page which is integrated with Communifire by default.
3. You can navigate to the following pages by selecting item on the menu bar:
    - Home
    - Browse
    - Create
    - Spaces
    - Profile Options
4. Available accounts within your Communifire network are displayed on the right-most panel.
5. A search box is also provided on the menu bar to search for an account or object within Communifire platform.

Appendix A Glossary

A

Ad Hoc Report

Reports that are designed by administrators and assigned to users. These reports differ from Dynamic

Reports in administrators' ability to select the data on which reports are based and include charts and

gauges in the reports.

Administrator

Users who have rights in ILM. Administrators are able to manage users, courses, curricula,

certifications, credits, instructors, facilities, and ILM options.

Comma-Separated Values (CSV)

File format that stores tabular data. In CSV files, commas are used to separate different columns

within a row. Most database and spreadsheet programs can read CSV files. In ILM, you can use

CSV files for many of the import and export options.

Course

A learning program that is used to train users in skills, product knowledge, and brand knowledge.

Users can go through their courses in learner, or in a classroom setting.

CSV

See Comma-Separated Values.

Event

The set of scheduled dates, times, and other parameters that are attached to a course in

ILM Administrator. Every course must have an event to be viewed by a user.

HTML

See Hypertext Markup Language.

Hypertext Markup Language (HTML)

Popular markup language that is used to create web pages. HTML is used to set up the structure

of a web document, which includes paragraphs, headings, lists, images, and links. Administrators

can change the look of portal pages by modifying HTML code.

Infor Learning Management Learner

The component used to access ILM and online courses.

Outside Credit

Credits that have been earned for non-ILM courses. Outside credits are recorded and maintained in ILM Administrator.

User Managers

A role that is created to indicate the relationship between a user and his or her manager. User managers have rights to perform certain functions and receive notifications within the system for the users assigned to them. User Managers are level independent and can exist without being an administrator in ILM.

XML

See Extensible Markup Language.