Infor Learning Management Administration Guide Online Help

Release 9.1

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Overview

The browser-based Administrator application is used by administrators to control access to the Infor Learning Management system, manage users, set up courses and learning events, and create and customize the reports to view the results of learning activities.

About this guide

This guide provides detailed instructions for the Administrator application administrative and user functions to complete specific setup and maintenance tasks.

Intended audience

This document is intended primarily for users who are responsible for configuring the portal, managing users and learning programs, and generating reports. Only users with administrative rights can access Administrator.

Signing in to ILM Administrator

Depending upon your access rights, you may be able to access all or some of the functions within Administrator.

To log on to Administrator:

1. Specify the server URL.
2. Specify your login name and password.
3. Click **Log In**.
4. If your organization has more than one portal, select the portal from the **Portal Selector** list and click **Go**.
5. Select **Administrator** from the role selector list.

Navigation

Use these options to navigate between the categories and system functions:

Option	Description
User role selector	Use to switch between the user roles. Only assigned roles are displayed.
Categories	Switch between categories.
Hierarchy	Select a level in which to perform actions.
Filter	Limit the list to meet the specified criteria.
Toolbar	Use to change the display type (list or tile) and access quick actions.

Hierarchy

With Infor Learning Management Administrator, you can divide your organization into different levels using the hierarchy. Users, courses, curricula, and certifications can be assigned on a level basis. The hierarchy is a visual representation of your organization's structure. It is divided into levels, beginning with level 1 (the System level) and going as deep as Level 12. Although your hierarchy is limited to 12 levels, it may contain thousands of levels overall because there can be many versions of each level from 2 to 12. The hierarchy divisions can be based on location, branch, or department..

To access the system hierarchy, click the hierarchy icon. To hide the hierarchy, click the button again.

Up to 12 hierarchy levels are supported. The active level, the level in which you are currently working, is highlighted in the hierarchy display. To expand a level to view the children levels, click the **+** icon next to the level name. Most of the time, you will need to select the hierarchy level before completing your task. When mentioned in this guide, the words **hierarchy level** indicate that you should select an applicable level.

Levels can be renamed to fit your organizational needs. For consistency purposes, this document uses the level 1, level 2, level 3, level 4, etc. Level 1 is referred to as the System level.

As you navigate through categories and their associated menu options, the available functions are displayed in bright text, while functions that are not available at the currently selected hierarchy level are grayed out. If a function that you wish to utilize is unavailable, open the hierarchy and select an applicable level to perform the desired function as long as you have the access rights to do so.

Level Indicator

When the hierarchy is expanded, the selected level is highlighted. When the hierarchy is collapsed, the selected level name and path are displayed above the selected page content.

Level 1 (System Level)

Level 1 is also known as the System level. You can control all other levels and the appearance of the other Infor Learning Management components at this level. While you can add users at this level, the users will not be associated with any of the lower levels or with any courses until these users are added to a level 2.

Levels 2 Through 12

All courses and users can be distributed from levels 2 through 12 depending on the level depth set in the system.

When setting up the level hierarchy, you should consider the way you will distribute courses to users within the levels and which reports you will want to generate.

Hierarchy Search

Use the hierarchy search to locate one or more levels by name or part of the name. Search results are displayed as a simple list below the search field. The level that is selected from the search results is automatically selected and displayed in the hierarchy.

Global search

Global search function is used to locate system categories and menu options, as well as individual courses, certification programs, curricula, and catalogs. All matching system categories and menu options are displayed below the search field as you type, and are not displayed as part of the search results. Press Enter or click Search to view the matching courses, certification programs, curricula, resources, and catalogs.

Dashboard

Dashboard is used to display helpful information in the form of widgets. The display and the available widgets may vary based on the configuration created by the users with the Designer role. The widgets can be repositioned in any order by dragging and dropping.

Available widgets (your options may vary):

Widget	Description
Ad Hoc Reports	A simple or dashboard-type shared ad hoc report view.
Announcements	A Rich Text Format widget that is typically used to display the scheduled announcements to users.

Users

You must add users to the System before you can assign user roles,grant permissions, and assign courses. A list of all users in levels that are assigned to the logged in administrator is displayed by default when the **Users** category is selected. To limit the users to a specific level, select the level in the hierarchy. To filter the users by a specific role or to search for a user by name, use the **Filter** options. Click a user tile to view that user's profile and user management options.

User options

User management options are available under the **More Options (…)** menu. Use the menu to access a list of system functions that apply to users with a specific role or to all users in the system. The available options are based on the role that is selected from the filter and on the current hierarchy level.

Table 1: Menu options by role

User Role	Menu options
All Users	• Manage outside credit types • Add existing users to current level • Move users to new levels • Merge users • Remove users • Reset user training data • Manage distribution groups
Instructor	• Assign Instructor role to Users • Assign E-Meeting Facilitator role to users • Remove E-Meeting Facilitator role from users • Configure Personal E-Meeting account
Author	• Assign Content Authoring role to users • Assign Content Repository rights • Remove Content Authoring role from users
Designer	No available options for this role.

User Role	Menu options
Administrator	• Administrators overview • Search for System Administrators • Assign System Administrator role to users • Remove System Administrator from users
Manager	• Assign User Manager role to users • Remove User Manager role from users • Assign Portal Manager role to users • Remove Portal Manager role from users
Course/Curriculum Manager	• Assign Course/Curriculum Manager role to users • Remove Course/Curriculum Manager role from users

Adding new users

You must add new users to the system to assign training. Courses can be assigned to users only on levels 2 through 12. When users are added on levels 2 through 12, they are also added on the system level. Users who are added on the system level are not added to any other level and cannot be assigned training until they are added to a non-system level.

The fields that must be populated depend on your system configuration. See Customizing the user registration form on page 301.

1. Select **Users > hierarchy Level**.
2. Click the **+** icon.
3. Specify the user information.
4. Click **Insert** to save the new user or click **Reset** to start over.
5. Click **OK** to confirm.

Adding new Outside Credit Type

1. Select **Users > Hierarchy Level > More Options > Manage Outside Credit Types**.
2. Click **Add new**.
3. Specify:
   - **Name**
   - **Outside Credit IMS ID**
   - **Description**
   - **Title**
   - **Score** and its visibility (Hidden, Administrator Only, Portal view only, or Portal optional).
   - **Passed** state and its visibility:

    - **Hidden** - the field is not displayed in the ILM Administrator and in the portal for this credit type
    - **Administrator Only** - the field is not displayed in the portal but can be modified in the Administrator
    - **Portal View Only** - the field is displayed in a view only state in the portal but it can be modified in the ILM Administrator
    - **Portal Optional** - the field can be modified in the portal and in the ILM Administrator but is not required
    - **Portal Mandatory** - the field can be modified in the portal and in the ILM Administrator and is a required field
- **Credits earned** and its visibility
- **Hours**
- **Date completed** and its visibility
- **Expiration Date** and its visibility
- **File attachments** allowance and its visibility
- **Active** status.
- **Require Approval Settings**

4 Click **Add**.

Editing Outside Credit Types

1 Select **Users > Hierarchy Level > More Options > Manage Outside Credit Types**.
2 Select the outside credit type to edit and click the **Edit** icon next to it.
3 To make changes to the outside credit type details, modify the information and click **Save**.
4 To manage levels, click Manage Levels, select levels to which this outside credit type applies, and click **Save**.
5 To manage users, click Manage users.

Users who requested outside credits and the approval status for those credits are displayed.

- To edit the user's outside credit request, click the **Edit** icon next to that credit, make appropriate changes, and click **Save**.
- To approve an outside credit request, select the user from the list and click **Approve**. Enter any comments for the user and click **Approve** again.
- To deny an outside credit request, select the user from the list and click **Deny**. Enter any comments for the user and click **Deny** again.
- To delete an outside credit request, select the request from the list and click **Delete**. Click **OK** to confirm the deletion.

6 To add or edit the approvers for this outside credit type, click **Associate individual users for approval**.

a To add a new approver, select the approver from the **Available Users** list and click **Assign**.
b To remove an approver, select the approver from the **Existing Users** list and click **Remove**.

Assigning individual users for approval

You can assign individual users to be able to approve outside credits requested by learners.

1. Select **Users > Hierarchy Level**.
2. Search and select the user from the list.
3. Click **Outside Credits**.
4. Click **Manage Outside Credits**.
5. Select an outside credit to modify its approvers.
6. Click **Associate individual users for approval**.
7. To assign an approver role to a new user, search for that user under the available users and click **Assign**.
8. To remove an approver role from a user, select that user under the existing users and click **Remove**.

Adding existing users to current level

Once you create a user account, that user can be added to other levels without re-entering the profile information.

1. Select **Users > hierarchy level**.
2. Select **All Users** from the filter options.
3. Select Add existing users to the current level from the **More Options** menu.
4. Use the search function to locate the users that you wish to add to the current level, or click **Show All** to show all users.
5. Select the check box next to each user that you are adding to the current level.
6. Click **Add**.

Moving users to new levels

You can move multiple users from one level in the hierarchy to another without removing them from the Infor Learning Management.

Note: When users are moved, their training records and transcripts remain the same. However, a user’s course list may change if the default courses available in their new level are different from those in the level they were removed from.

To move users to a new level:

1. Select **Users > Hierarchy System Level > More Options >** Move Users to New Levels.
2. Specify the search criteria to locate one or more users that you want to move.
3. Specify the **IMS Unique Level ID** for the level that you want to move users to.

   Use the Edit Level Properties on page 309 option to find a level's **IMS Unique Level ID**. This option can be found at **System > Configuration Settings > Level Structure**.

4 Click **Search**.
5 Select the check box next to each user that you want to move.
6 Click **Move Users to New Level**. Click **OK** on the confirmation dialog box.

Merging users

The Merge Users wizard guides you through the process of merging duplicate user accounts into a single account. The wizard merges all current and past user profile data and user training data.

When you merge users, one user is designated as the recipient and the other user is designated as the donor. The recipient is the user that will remain in the system after the users are merged. The donor's data is moved to the recipient, and the donor is then deleted.

Note: Use caution when merging users with different certifications. Since the Merge Users wizard does not overwrite the recipient's scores with the donor's scores, you must make sure that you do not have a user that has earned a certification with a failing score.

To merge users:

1 Select **Users > More Options > Merge Users**.
2 Select **Merge User Accounts**.
3 Click **Next**.
4 Use advanced search to locate and select the recipient user profile.
   a Specify the search criteria. You can filter your search using these constraints:
      - Use **Begins** or **Contains** to specify whether the text searched for begins the selected field or is contained anywhere within it.
      - Use **User data search field** and **Search text** to specify the field to be searched and the text to search for in that field.
      - Use **Locale** to specify geographic region where the user is located.
      - Use **Show User** to select **`Active`**, **`Inactive Only`**, or**`All Users`**.
      - Use**Sort by** to specify how the search results will be listed.
      - Select **Only return items that match ALL of the search criteria** or **Return items that match ANY of the search criteria**.

   b Click **Search**.
   c Use **<<** and **>>** to scroll through the pages of recipient search results.
   d Select the desired recipient in the list.

5 Click **Next**.

   When **Next** is clicked, the following information is saved into the Log File: Current Time, Admin User ID, Admin User Name, Action Performed, Recipient User ID, and Recipient User Name.

6 Use advanced search to locate and select the user whose information will be merged into the recipient account. The system prevents you from selecting the same donor and recipient account.
   a Specify the search criteria. You can filter your search using the same constraints you used to locate the recipient account on the previous page.
   b Click **Search**.

c Use **<<** and **>>** to scroll through the pages of donor search results.

d Select the desired donor in the list.

7 Click **Next**.

When **Next** is clicked, the following information is saved into the Log File: Current Time, Admin User ID, Admin User Name, Action Performed, Recipient User ID, and Recipient User Name.

8 Define a series of merge options for the recipient and donor data. For each category of training data there is a drop down list with a set of options to specify which data set should be retained during the merge. See the table below for more details on the options you can select in the drop down lists.

Define a series of merge options for the recipient and donor data. For each category of training data there is a drop down list with a set of options to specify which data set should be retained during the merge. See the table below for more details on the options you can select in the drop down lists.

Note: Click View Details to view the donor and recipient data relevant to each data group. This screen is only intended to review data and does not allow you to modify it. A print function is available to print the page of data.

Data Group Field	Merge Options	Results	Merge Rules
User Fields	**`Recipient User Fields Only`**	No action is required. All recipient user fields will remain as they are.	NA
	`Donor User Fields Only`	Recipient user fields will be replaced with the donor user fields.	NA
	`Merge User Fields` (default)	Recipient and donor user field data will be merged to the recipient.	The merge will retain the recipient field unless it is blank. If the recipient field is blank, the merge takes the donor field and populates it to the recipient.

Data Group Field	Merge Options	Results	Merge Rules
User Levels	**`Recipient Levels Only`**	No action is required. All recipient user levels will remain as they are.	NA
	`Donor Levels Only`	Recipient user levels will be replaced with the donor user levels.	NA
	`Merge Levels` (default)	Recipient and donor level data will be merged to the recipient.	The recipient levels take precedence. The merge populates those donor levels to the recipient that the recipient was not previously assigned to.
User Certificates	**`Recipient Certificates Only`**	No action is required. All recipient user certificates will remain as they are.	NA
	`Donor Certificates Only`	Recipient user certificates will be replaced with the donor user certificates.	NA
	`Merge Certificates` (default)	Recipient and donor certificate data will be merged to the recipient.	The recipient certificates take precedence. The merge populates those donor certificate records to the recipient that were not previously assigned to the recipient.
User Catalogs	**`Recipient Catalogs Only`**		
	`Donor Catalogs Only`		
	`Merge Catalogs` (default)		

Data Group Field	Merge Options	Results	Merge Rules
User Curricula	**`Recipient Curricula Only`**	No action is required. All recipient user curricula will remain as they are.	NA
	`Donor Curricula Only`	Recipient user curricula will be replaced with the donor user curricula.	NA
	`Merge Curricula` (default)	Recipient and donor curricula data will be merged to the recipient.	**a** Donor curricula will be reassigned from donor to the recipient except in the case of Common Curricula. ("Common Curricula" are those that are assigned to both the recipient and the donor prior to the merge.) **b** In the case of Common Curricula, the curricula data with the earliest date of registration takes precedence and will be populated to the recipient.
User Curricula Schedule	**`Recipient Curricula Schedule Only`**		
	`Donor Curricula Schedule Only`		
	`Merge Curricula Schedule` (default)		

Data Group Field	Merge Options	Results	Merge Rules
User Courses and Events	`Recipient Courses and Events Only`	No action is required. All recipient user courses and events will remain as they are.	NA
	`Donor Courses and Events Only`	Recipient user data will be replaced with the donor user data.	NA
	`Merge Courses and Events` (default)	Recipient and donor course and event data will be merged to the recipient.	

Data Group Field	Merge Options	Results	Merge Rules
			a Donor courses/events will be re-assigned from donor to the recipient except in the case of Common Courses/Events. (“Common Courses/Events” are those that both the recipient and the donor are enrolled in prior to the merge.) **b** In the case of Common Courses/Events, the result of the merge depends on the status of enrollment. The following conditions are considered: Not Enrolled, Enrolled, Wait List, and Awaiting approval. In the case that both the recipient and the donor records have the same status, the earliest date for Course and Event registration takes precedence and will be populated to the recipient.

Data Group Field	Merge Options	Results	Merge Rules
User Transcript and Session Data	`Recipient Transcript/Session Only`	No action is required. All recipient user transcript and session data will remain as they are.	NA
	`Recipient Transcript/Session Only`	Replace the records for the recipient with the donor records.	NA
	`Merge Transcript/Session` (default)		

Data Group Field	Merge Options	Results	Merge Rules
			a The merge will retain the recipient data unless it is blank If it is blank, the merge will take the donor data and populate it to the recipient. **b** For the Transcript and Session data, the following system entities (tables) will be affected: Answers, Random Questions, Pages Visited, Evaluations/Surveys, and Roadmap questions. The definition of “blank” data will differ among the entities. For Answers, Random Questions and Pages Visited we consider data within the Modules. In the case where there is at least one such recipient record for the Module, the merge will leave all of the recipient data within the Module as is. If there is no data within the recipient Module, the merge will populate it with the donor records. For Evaluations

Data Group Field	Merge Options	Results	Merge Rules
			and Surveys, SCO Course User, and Roadmap Questions, we consider data within the Courses. **c** Course Comments and Forum Posts will be merged automatically by the wizard.
User Outside Credits	`Recipient Outside Credits Only`	No action is required. All recipient outside credits will remain as they are.	NA
	`Donor Outside Credits Only`	Replace the outside credit records for the recipient with the outside credit records of the donor.	NA
	`Merge Outside Credits` (default)	The recipient and donor outside credits data will be merged to the recipient.	The merge populates (adds) all donor outside credits to the recipient.
User Course Credits	`Recipient Course Credits Only`		
	`Donor Course Credits Only`		
	`Merge Course Credits` (default)		
User External Test Scores	`Recipient External Test Score Only`		
	`Donor External Test Score Only`		
	`Merge External Test Score` (default)		

Data Group Field	Merge Options	Results	Merge Rules
User OpenAccess	`Recipient OpenAccess Only`		
	`Donor OpenAccess Only`		
	`Merge OpenAccess` (default)		

9 Click **Next** to begin the merge.

10 Click **OK** to confirm the merge.

Note: Once the merge is confirmed, the donor account is deleted and the merge is completed. You will not be able to preserve the donor account after the merge has completed.

User Merge Log file

Select **Users > View Merge Logs**. User Merge Log file fields are explained in this table:

Log file section	Description
Date	Date and time of merge
Administrator	Administrator performing the merge
Recipient User Selected	
Donor User Selected	
User Fields Choice	Lists the option selected and field names and values for: Recipient User Fields, Donor User Fields and Recipient Result User Fields
Levels Choice	Lists the option selected and level name and level ID for: Recipient Levels, Donor Levels, and Recipient Result Levels
Certificates Choice	Lists the option selected and Recipient Certificates, Donor Certificates, and Recipient Result Certificates
Curricula Choice	Lists the option selected and Recipient Curricula, Donor Curricula, and Recipient Result Curricula
Courses and Events Choice	Lists the option selected and Recipient Courses and Events, Donor Courses and Events, and Recipient Result Courses and Events

Log file section	Description
Transcripts and Session Data Choice	Lists the option selected and Recipient External Test Scores, Donor External Test Scores, and Recipient Result External Test Scores Recipient ILM Session Data, Donor ILM Session Data, and Recipient Result ILM Session Data Recipient Score Data, Donor Score Data, and Recipient Result Score Data
Outside Credits Choice	Lists the option selected and Recipient Outside Credits, Donor Outside Credits, and Recipient Outside Credits
Course Credits Choice	Lists the option selected and Recipient Course Credits, Donor Course Credits, and Recipient Result Course Credits
External Test Score Choice	Lists the option selected and Recipient External Test Score, Donor External Test Score, and Recipient Result External Test Score

Removing Users

You can remove a user from a level without removing the user from the system.

Caution: If you remove a user from the System level (Level 1) or if you use the **Remove Permanently** option on any other level, all records and reports for that user will be deleted from the system.

To remove users:

1. Select **Users > Hierarchy Level > More Options >** Remove Users.
2. Specify the search criteria to locate one or more users that you want to remove and click **Show All**.
3. Select each user you wish to remove from the level.
4. To remove the selected users from the system at any level other than the System level, select the **Delete permanently** check box.
5. To have Infor Learning Management retain the users' information when removing a user from the System level or when you check the **Delete permanently** check box on any other level, check the **Log users along with their transcript(s)** check box.

   Note:

   - This option is only enabled at the System level or when you select **Delete permanently** on any other level.
   - When this option is selected, the user's transcript is saved as a text file on the ILM server. You can retrieve this file by emailing support.
6. Click **Remove** or **Delete** ("Delete" is displayed at the System level; "Remove" is displayed at all other levels), and click **OK** on the confirmation message.

Resetting User Training Data

1. Select **Users > Hierarchy Level > More Options >** Reset User Training Data.
2. Locate and select the user(s) for which you wish to reset the training data. Click **Next**.
3. Select the completions (course, curriculum, and certification) which you wish to reset and click **Next**.
4. If any courses were selected in the previous step, select **Reset all courses** or select the specific courses to reset from the list.
5. If any curricula were selected in the previous step, select **Reset all curricula** or select the specific curricula to reset from the list.
6. If any certificates were selected in the previous step, select **Reset all certificates** or select the specific certificates to reset from the list.
7. Click **Next**
8. Review your selections and click **Submit**.

   Note: This action cannot be reversed.

Adding or Editing distribution groups

Distribution groups enable distributing different types of content to a select group of users defined by distribution rules.

1. To add a new distribution group, select **Users > Hierarchy level > More Options >** Manage distribution groups.
2. To add a new distribution group, click the **+** icon.
   a. Specify the group **Name**.
   b. Specify **Description**.
   c. If you want the distribution group to be active, select **Active**.
   d. Click **Save**.
3. To edit an existing distribution group, locate the group on the Manage distribution groups page and click the **Edit** icon on the group tile. Additionally, you can select General Options **>** Edit Distribution Group if you navigated to one of the group configuration pages.
   a. Change the group **Name**, **Description**, or the **Active** status.
   b. Click **Save.**
4. To add or edit distribution rules, click General Options **>** Distribution Rules on the view or edit group page.

   After adding distribution rules you can use **Save As** option to create a new distribution group based on the distribution rule criteria.
5. To associate catalogs, click Associate **>** Associate Catalogs on the view or edit group page.
   a. To associate a new catalog, select the catalog from the **Available Catalogs** list and click **Associate**.
   b. To disassociate a catalog, select the catalog from the **Associated Catalogs** list and click **Disassociate**.

6 To associate curricula, click Associate **>** Associate Curricula .
7 To associate courses, click Associate **>** Associate Courses.
8 To associate certifications, click Associate **>** Associate Certifications.
9 To associate continuing education providers, click Associate **> Associate Credit Providers**.
10 To associate ad hoc reports, click Associate **>** Associate Ad Hoc Reports.
11 To associate spaces, click Associate **>** Associate Spaces.
12 To associate nested distribution groups, click Associate **>** Associate Nested Distribution Groups.

Managing Distribution Group Users

1. Select **Users > Hierarchy level > More Options >** Manage distribution groups.
2. Select the distribution group for which you want to manage the users.
3. To manage whitelisted (manually added users who do not meet distribution group rules but need to be part of that group), click Users **>** Manage Whitelist.
   a. To assign a user to the whitelist, select the user from the **Available Users** list and click **Assign**.
      Note: Users that are assigned to the blacklist do not show up in the **Available Users** list.
   b. To remove a user from the whitelist, select the user from the **Existing Users** list and click **Remove.**
4. To manage blacklisted users (users that meet distribution group rules but do not need to be part of that group or associated object), click Users **>** Manage Blacklist.
   a. To assign a user to the blacklist, select the user from the **Available Users** list and click **Assign.**
      Note: The users who were added to the whitelist are also displayed in the **Available Users** list, however, once they are added to the blacklist, they are removed from the whitelist.
   b. To remove a user from the blacklist, select the user from the **Existing Users** list and click **Remove.**
5. To view distribution group users, click Users **>** View Assigned Users .

Assigning the instructor role to users

To make a user available to lead classroom courses, make the user an instructor. After assigning the instructor role to a user, enable the instructor for scheduling and enter information about the instructor on the **Manage Instructor Profile** page.

To assign the instructor role to users:

1. In the categories bar, select **Users**.
2. Select the appropriate level the hierarchy.
3. Select **Instructors** from the filter options.
4. Select Assign the Instructor Role to Users from the other options list.

5 To locate one or more users to which you will assign this role, specify the search criteria or click **Search** to display all users.
6 Select each user that you want to make an instructor.
7 Click **Add**.

After assigning the instructor role, enable the instructor for scheduling and enter information about the instructor. See Managing an instructor profile on page 72.

Removing the instructor role from users

Users that no longer need to have an instructor role can have that role removed.

To remove the instructor role from users:

1 In the categories bar, select **Users**.
2 Select the appropriate hierarchy level.
3 Select **Instructors** from the filter options.
4 Select Assign the Instructor Role to Users.
5 To locate one or more users from whom the instructor role will be removed, under the **Existing Users** specify the search criteria or click **Search** to display all users.
6 Select each user from whom you want to remove the instructor role.
7 Click **Remove**.

Managing instructor expertise

An expertise is a topic or skill in which an instructor has advanced knowledge. Administrators create expertise and assign them to instructors to help you determine which instructors are most qualified to teach specific classroom courses.

Before you can assign an expertise to an instructor, you must first add it to the system.

To view, add, edit, or delete instructor expertise:

1 In the categories bar, select **Users**.
2 Select **Instructors** from the filter options.
3 Select Manage Instructor Expertise from the other options list.
4 To view existing expertise, select View Expertise from the Option List.
5 To add an expertise, select Add Expertise from the Option List.
   a Specify a name or description for the expertise in the **Description** field.
   b Click **Submit**.
6 To edit the description of an expertise, select Edit Expertise from the Option List. Update multiple records by selecting more than one check box before clicking **Update**.
   a Change the text in the relevant field.

- b Select the check box in the update column next to the field you edited.
- c Click **Update**.

7 To delete an expertise, select Edit Expertise from the Option List. Delete multiple records at once by selecting more than one check box before clicking **Delete**.

- a Select the check box in the delete column next to the expertise you want to delete.
- b Click **Delete**. Click **OK** on the confirmation message.

Once an expertise is created, it should be assigned to relevant instructors. Doing so allows it to be used during the course scheduling process to assist in selecting the most appropriate instructor for a classroom event. Assigning expertise to an instructor can be done with the Manage Instructor Profile option. See Managing an instructor profile on page 72.

Assigning the instructor role to users

To make a user available to lead classroom courses, make the user an instructor. After assigning the instructor role to a user, enable the instructor for scheduling and enter information about the instructor on the **Manage Instructor Profile** page.

To assign the instructor role to users:

1. In the categories bar, select **Users**.
2. Select the appropriate level the hierarchy.
3. Select **Instructors** from the filter options.
4. Select Assign the Instructor Role to Users from the other options list.
5. To locate one or more users to which you will assign this role, specify the search criteria or click **Search** to display all users.
6. Select each user that you want to make an instructor.
7. Click **Add**.

After assigning the instructor role, enable the instructor for scheduling and enter information about the instructor. See Managing an instructor profile on page 72.

Removing the instructor role from users

Users that no longer need to have an instructor role can have that role removed.

To remove the instructor role from users:

1. In the categories bar, select **Users**.
2. Select the appropriate hierarchy level.
3. Select **Instructors** from the filter options.
4. Select Assign the Instructor Role to Users.
5. To locate one or more users from whom the instructor role will be removed, under the **Existing Users** specify the search criteria or click **Search** to display all users.

6 Select each user from whom you want to remove the instructor role.
7 Click **Remove**.

Assigning content repository rights to authors

An Content Creator author must be granted rights to access **System** and specific sub-folders and files in the Content Repository.

To assign view, add, delete, and update rights for folders and files within the Content Repository:

1. In the categories bar, select **Users**.
2. Select the appropriate Level 2 or below in the hierarchy (this option is not enabled at the System level).
3. Select **Authors** from the filter options.
4. Select Assign Content Repository Rights from the other options list.
5. Select the folder for which you want to manage users' rights.
6. To assign rights to one or more users, check the check box corresponding to the folder or file rights you wish to assign to those users.
7. To remove rights from one or more users, clear the check box corresponding to the folder or file rights you wish to remove from those users.
8. Click **Assign Rights**.

Administrators overview

The Administrators Overview option displays all of the administrators that exist within the system.

To view all administrators:

1. In the categories bar, select **Users**.
2. Select the System level from the hierarchy (this option is not enabled at lower levels).
3. Select **System Administrators** from the filter options.
4. Select Administrators Overview from the other options list.

Searching for and viewing system administrators

To search and view a list of administrators and their associated levels:

1. In the categories bar, select **Users**.
2. Select **System Administrators** from the filter options.
3. Select Search for System Administrators from the other options list.

4. To view the levels of one or more administrators, use the search options or click **Show All** to display the levels of all administrators.

   Level names displayed in bold font are the levels for which a user is an administrator. For Levels 2-12, the entire path leading to that level is displayed.

Assigning the system administrator role to users

Only administrators can access Administrator, so you must designate a user as an administrator before they can perform administrative tasks. After assigning the administrator role to a user, you must then give the user administrative rights on the **Edit Administrative Rights** page before they can open Administrator successfully.

Note: Users can be made administrators in any level. Once a user has been made an administrator in any level other than the System level, however, they are locked into that level number and cannot be made an administrator on any levels that are not at that same level number.

In order to make the user an administrator at a different level number, you must first remove all of their existing administrator roles. Once you have done this you will be able to assign them as an administrator at a new level.

To assign the system administrator role to users:

1. In the categories bar, select **Users**.
2. Select the appropriate level the hierarchy.
3. Select **System Administrators** from the filter options.
4. Select Assign the System Administrator Role to Users from the other options list.
5. To locate one or more users to which you will assign this role, specify the search criteria or click **Show All** to display all users.
6. Select each user you want to make an administrator.
7. Click **Add**.

After assigning the system administrator role, you must give the user administrative rights using the Edit Administrative Rights option on the user record.

Removing the system administrator role from users

There will be times when you want to remove the system administrator role from a user without removing the user from Infor Learning Management. When an administrator is removed from a level within Infor Learning Management, they are no longer able to perform administrative tasks. They are not removed from the system, however; all user data is preserved.

To remove the system administrator role from users:

1. In the categories bar, select **Users**.
2. Select the appropriate level in the hierarchy.

3 Select **System Administrators** from the filter options.
4 Select Remove the System Administrator Role from Users from the other options list.
5 Specify search criteria or click **Show All** to display all administrators.
6 Select each user from whom you want to remove this role.
7 Click **Remove**, then click **OK** on the confirmation message.

Assigning the user manager role to users

A user manager is created to form a relationship between a user and their supervisor. User managers are level independent and can exist without being an administrator in Infor Learning Management. Assigning a user the user manager role gives the user access to perform certain functions within the system and to receive notifications regarding users who are assigned to them.

Note:

- If a user has available self-registration courses that require a manager's approval they will see a drop down list of their managers in the Portal.
- Configuration options are available that allow user managers to receive notifications regarding all notifications that are sent to the users they manage.

To assign the user manager role to users:

1 In the categories bar, select **Users**.
2 Select the appropriate level the hierarchy.
3 Select **User Managers** from the filter options.
4 Select Assign the User Manager Role to Users from the other options list.
5 To locate one or more users to which you will assign this role, specify the search criteria or click **Show All** to display all users.
6 Select each user you want to make a manager.
7 Click **Add**.

Removing the user manager role from users

Removing the user manager role breaks the relationship between a user manager and their users. It is an irreversible action, so be careful when performing this task.

To remove the user manager role from users:

1 In the categories bar, select **Users**.
2 Select the appropriate level the hierarchy.
3 Select **User Managers** from the filter options.
4 Select Remove the User Manager Role from Users from the other options list.
5 Select each user from whom you want to remove the user manager role.
6 Click **Remove**, then click **OK** on the confirmation message.

Assigning the course / curriculum manager role to users

The course/curriculum manager role forms a relationship between a user and specific courses and curricula. Course/curriculum managers can perform functions for the courses and curricula assigned to them.

Note: A course/curriculum manager who needs to perform additional administrative duties in the system beyond their existing scope must also be made an administrator at additional levels.

To assign the course/curriculum manager role to users:

1. In the categories bar, select **Users**.
2. Select the appropriate level the hierarchy.
3. Select **Course/Curriculum Managers** from the filter options.
4. Select Assign the Course / Curriculum Manager Role to Users from the other options list.
5. To locate one or more users to which you will assign this role, specify the search criteria or click **Show All** to display all users.
6. Select each user you want to make a course/curriculum manager.
7. Click **Add**.

Removing the course / curriculum manager role from users

Removing the course/curriculum manager role from a user will break the relationship between the user and the courses and curricula that they were assigned to manage.

Note: When a course/curriculum manager is removed from a level within Infor Learning Management they are no longer able to perform any administrative functions within that level. However they are not removed from the system and any data (such as session and scoring data) is preserved.

To remove the course/curriculum manager role from users:

1. In the categories bar, select **Users**.
2. Select the appropriate level the hierarchy.
3. Select **Course/Curriculum Managers** from the filter options.
4. Select Remove the Course / Curriculum Manager Role from Users from the other options list.
5. Select each user from whom you want to remove the course/curriculum manager role.
6. Click **Remove**, then click **OK** on the confirmation message.

Assigning the e-meeting facilitator role to users

Add the e-meeting facilitator role to a user so they can schedule and host e-meetings in Infor Learning Management Portal.

To assign the e-meeting facilitator role to users:

1. In the categories bar, select **Users**.

2 Select the appropriate level the hierarchy.
3 Select **E-Meeting Facilitators** from the filter options.
4 Select Assign the e-Meeting Facilitator Role to Users from the other options list.
5 To locate one or more users to which you will assign this role, specify the search criteria or click **Show All** to display all users.
6 Select each user you want to make an e-meeting facilitator.
7 Click **Add**.

Removing the e-meeting facilitator role from users

When you no longer want a user to be an e-meeting facilitator, remove their ability to schedule and host e-meetings.

To remove the e-meeting facilitator role from users:

1. In the categories bar, select **Users**.
2. Select the appropriate level the hierarchy.
3. Select **E-Meeting Facilitators** from the filter options.
4. Select Remove the e-Meeting Facilitator Role from Users from the other options list.
5. Select each user from whom you want to remove the e-meeting facilitator role.
6. Click **Remove**, then click **OK** on the confirmation message.

Viewing user profiles

Use the **View Profile** option to view the selected user's details and profile information.

1. In the categories menu, select **Users**.
2. Use the filter options to locate the user.
3. Select the user to open the profile details.

   The user's profile information is displayed by default. If you navigate to another profile option and want to view this information again, click **General Options** and then click **View Profile**.

Updating user profiles

Users can update their own profile through Infor Learning Management Portal, but administrators can also update user account information with the **Update Profile** option. In addition to updating basic information such as First Name, Last Name, and e-mail address, you can:

- Set a user's active status

- Set a leave date
- Change the login name
- Change the password
- Force the user to change the password on next login
- Change the user's interface language
- Change the user's regional locale preference

To update a user's profile information:

1. In the categories menu, select **Users**.
2. Use the filter options to locate the user.
3. Select the user tile to open the user record.
4. Click **More Options**.
5. Select **Update Profile**.
6. Specify the information in the required fields:

   Active
   Select to indicate the user has been activated. Clearing this field sets the user as inactive in Infor Learning Management and enables the **Leave Date** field.

   Login Name and Password
   Changing the login name or password changes the information that the user uses to log into Infor Learning Management.

   First Name and Last Name
   Specify the user's first and last names.

   E-mail
   Specify the user's e-mail address to use for any correspondence, and any system messages and notifications.

   Change password at next login
   Select this field to force the user to select a new password upon the next login.

   Interface Language
   Select a language in which the interface is displayed to the user.

   Regional Locale Preference
   Select a locale in which dates, calendars, and currency in Administrator and Infor Learning Management Portal are displayed.

7. Specify any additional information in the optional fields.
8. Click **Update** and click **OK** on the confirmation message, or click **Reset** to clear your changes and revert to the previously saved information.

Viewing user levels

1 In the categories menu, select **Users**.
2 Use the filter options to locate the user.
3 Select the user to open the user record.
4 Click **More Options**.
5 Select **View Levels**.

Unlocking user accounts

A user is locked out of Infor Learning Management after trying to log in beyond the allowed number of failed attempts. When this happens, reset the account so they can have access again.

Note: After unlocking an account, be sure to provide the user with their correct account information or direct them to use the account recovery feature on your portal login page.

To unlock user accounts:

1 In the categories bar, select **Users**.
2 Use the filter buttons and search functions to find the user.
3 Select the user in the results table to open the user record.
4 Click **More Options**.
5 Select **Unlock Account**.
6 Select **Unlock**.

Impersonating users

Use the **Impersonate User** option to view the user's dashboard, course information, and transcript..

Note: The information is available in view-only mode. You will not be able to make any changes when impersonating a user.

1 In the categories menu, select **Users**.
2 Use the filter options to locate the user.
3 Click the **Impersonate User** icon and then click **Yes** to confirm.

   If you navigate to any user profile option and then want to impersonate that user, select **General Options** and then select **Impersonate User**.

Resetting user passwords

If a user forgets their password or if it needs to be changed as a security measure, you can change a user's password. Once you reset the user's password, the user can log into Infor Learning Management with the new password and then change it to a more secure password using the **My Profile** option in the Portal. Users can also request forgotten passwords on the portal login page.

To reset user passwords:

1. In the categories bar, select **Users**.
2. Use the filter buttons and search functions to find the user.
3. Select the user in the results table to open the user record.
4. Click **More Options**.
5. Select **Reset Password**.
6. Specify this information:

   Password
   Specify a new password for the account.

   Confirm Password
   Repeat the new password for the account.

   Change password at next login
   Select this field to force the user to create a new password the next time they log in.

7. Click **Update**.

Logging users out

In the event that you need to force a currently logged in user to exit Infor Learning Management, you can immediately terminate the user's current session.

To log users out:

1. In the categories bar, select **Users**.
2. Use the filter buttons and search functions to find the user.
3. Select the user in the results table to open the user record.
4. Click **More Options**.
5. Select **Log User Out**.
6. To compose and send an email to the user warning them that you are going to log them out of Infor Learning Management or to provide them with information as to why this action was taken, click Email.
7. Click **Logout**, then click **OK** on the confirmation message.

Managing user payment profiles

Payment profiles are normally assigned on a level basis but you can manually assign payment profiles to a user, update a user's access expiration date and access term type.

To manage user payment profiles:

1. In the categories menu, select **Users**.
2. Use the filter options to locate the user.
3. Select the user to open the user record.
4. Click **More Options**.
5. Select **Manage Payment Profiles**.
6. Select the payment profile that you want to assign to the user.
7. To extend the user's access term to a specific date, select **Update Expiration Date** and specify a date.
8. Select the access term type you want to assign to the user.
9. Click **Apply**.

Managing user roles and permissions

Administrators can assign roles and specific role permissions to users and associate users with one or more Permission Group. Almost every action has a permission rule associated with it. Some permissions are assigned by default when a user role is assigned and some permissions may need to be assigned manually.

Updating user permissions

1. Select a user from the **Users** page.
2. Select **More Options > Update Permissions > Permissions**.
3. Select the roles you want to assign to the user.
4. To assign individual permissions, expand the role by clicking + next to the role, and select the permissions you want to assign.
5. Click **Save**.

Managing permissions group associations

1. Select a user from the **Users** page.
2. Select **More Options > Update Permissions > Permission Groups**.
3. Select the permission groups to which you want to assign the user.

4 Click **Save**.

Viewing courses for users

To view the courses and events within a level to which users are assigned:

1. In the categories bar, select **Users**.
2. Select the appropriate Level 2 or below in the hierarchy (this option is not enabled at the System level).
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click **Courses**.
6. Select **View Courses**.

Assigning courses to users

Use Assign courses to users to directly assign courses and events to a user.

To assign courses and events to users

1. In the categories bar, select **Users**.
2. Select the appropriate Level 2 or below in the hierarchy. This option is not enabled at the System level.
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click the **Courses** tab.
6. Select **Assign Courses**. A list of courses is displayed. If a prerequisite for the course exists, then the requirement will be displayed.
7. Select the check box for each course or event that you want to assign to the user. If you select an event, its associated course is automatically selected.
8. Click **Add**.

Removing courses from users

This option does not delete the course from the level, it simply makes it unavailable to the user.

Note: Courses marked with a bullet symbol are part of a curriculum to which the user has been assigned. To remove the user from one of these courses, you must first remove the user from the curricula that contains the course.

To remove a course or event from a user:

1. In the categories bar, select **Users**.
2. Select the appropriate Level 2 or below in the hierarchy (this option is not enabled at the System level).
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click **Courses**.
6. Select **Remove Courses**.
7. Select one or more courses or events that you want to remove from the user.

   Note: Selecting an event will automatically select its associated course.
8. Click **Remove** and then click **OK** on the confirmation message.

Viewing attendance

To view attendance records for a classroom course:

1. In the categories bar, select **Users**.
2. Select the appropriate in the hierarchy.
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click **Courses**.
6. Select **View Attendance**.
7. Select a classroom event to view in **Please select an event**.

Recording attendance for users

To modify users attendance record for a classroom course:

1. In the categories bar, select **Users**.
2. Select the appropriate level in the hierarchy.
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click **Courses**.
6. Select **Record Attendance**.
7. Select a classroom event to modify in **Please select an event to edit**.

8 Select or clear each session to indicate whether or not the user attended it.
9 Click **Update**.

Resetting user course tracking data

An assessment score is recorded in Infor Learning Management after a user satisfies the course completion rules. Administrators can also record external test scores for users.

Use **Reset Course Tracking Data** to allow a user to retake a course, assessment module, or external test. Course scores, visited pages, and question pools can be included among the data that is reset. This allows users to retake courses and assessments with new question pools. While this information is reset, the user's historical scores and event credit information are retained by the system. However, you have the option of permanently deleting this information as well.

Note: This option will reset course data for a single user. To reset course data for multiple users, use the **Reset Course Tracking Data** option. See Resetting course user data on page 133.

Follow the steps below to use the **Reset Course Tracking Data** option.

To reset course data for particular users:

1. In the categories bar, select **Users**.
2. Select the appropriate level in the hierarchy.
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click **Courses**.
6. Select **Reset Course Tracking Data**.
7. To locate one or more courses that you want to reset for the user, use the search options or click **Show All** to display all courses.

   Some courses or events cannot have its data reset when they are marked with the following symbols:

   - **CPU**—this course is part of a certification program
   - **CU**—this course is part of a curricula
   - **DEF**—this is a default course
   - **E**—this is a default event

8. Specify this information:

   Reset Course
   Select to reset the user's scores, assessment answers, and visited pages associated with selected courses.
   Note: Course scores and event credit will be retained in the user's historical information unless **Delete all course scores and history** is selected.

   Reset question pool
   Select to generate new question pools for the user.

Delete all course scores and history
Select to permanently remove all current and historical scores, event credits, external test scores, and question data.
Note: Selecting **Delete all course scores and history** disables **Reset Course**.

Reset timer for assessment modules

9 Select each course for which you want to reset or delete course tracking data.
10 Click **Submit**.

Modifying earned CE credits

Administrators can modify earned CE credits for the users if **Enable the credit value to be changed by administrators after the user completes the course** is selected for the CE Credit Provider assignment for the course.

1. In the categories bar, select **Users**.
2. Select the appropriate level in the hierarchy.
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click **Courses**.
6. Select **Modify Earned CE credits**.
7. Specify the course for which you want to modify the CE credits.
8. Make the CE credits changes.
9. Click **Apply.**

Viewing user curricula

To view the curricula assigned to a user:

1. In the categories bar, select **Users**.
2. Select the appropriate level in the hierarchy.
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click **Curricula**.
6. Select **View Curricula**.

About resetting curriculum completion status

When a curriculum is reset for a user, the following occurs:

- The dates and times the user completed each course in the curriculum are reset
- Responses for ILM assessment questions are reset
- Course events in the curriculum will be removed from the user's training history

While the curriculum is reset, score and reset date information is retained for reporting purposes. You can view this information when you run reports on the curricula in Infor Learning Management Administrator and users can view this information in their transcript in the Infor Learning Management Portal.

Caution: Resetting a curriculum is an irreversible action, proceed with caution.

- Resetting a user's curriculum tracking data archives all current scores for courses in the curriculum. If courses in the curriculum also exist in other curricula assigned to the user, the scores being reset may affect a user's ability to achieve course completion for those curricula. If you choose to proceed, you may have to manually grant credit to users who have completed those courses.
- A user will still be considered certified if a curriculum that is reset is associated with a certification program that the user has completed. However, there will not be any current scores for the courses completed in the associated curriculum.
- A user's scores and event credit information will remain on record. However, scores dated before the date that the curriculum tracking data was reset will not be considered current.

You can manually grant credit to a user for courses in a curriculum that has been reset.

Related Tasks

There are two ways you can reset curricula for users:

- Reset curricula for single user. See Resetting user curriculum tracking data on page 65.
- Reset a curriculum for multiple users at once. See Resetting user status for a curriculum on page 154.

To manually grant credit to a user, see Administering course credit on page 132.

Resetting user curriculum tracking data

Resetting a user's curriculum tracking data changes a curriculum that a user has completed to incomplete. This allows users to retake the courses in the curriculum for re-certification purposes.

Resetting user curricula is irreversible. Before you start, make sure you understand what will happen. See About resetting curriculum completion status on page 65.

Note: To reset curriculum tracking data for multiple users at once, use the **Reset User Status** option. See Resetting user status for a curriculum on page 154.

To reset a specific user's completion status for selected curricula:

1. In the categories bar, select **Users**.

2 Select the appropriate level in the hierarchy.
3 Use the filter buttons and search functions to find the user.
4 Select the user in the results table to open the user record.
5 Click **Curricula**.
6 Select **Reset Curriculum Tracking Data**.
7 To locate one or more curricula you want to reset for the user, use the search options or click **Show All** to display all curricula.
8 Select each curriculum for which you want to reset curriculum tracking data.
9 Click **Set to Incomplete**.

Curriculum Completion Report

To a view a specific user's curriculum completion report, select **Users > Hierarchy Level > user > Curriculum Completion**. You can export the report to an Excel file by clicking **Export to Excel**.

Viewing users certificates

View a list of certificates that a user has earned by completing certification programs. Use this list as a certificate history and to preview their completed certificate documents.

Note: Transcript history is not available for certificates that have been granted to a user by an administrator.

To view certificates for users:

1 Select **Users > Hierarchy level**.
2 Use the filter buttons and search functions to find the user.
3 Select the user in the results table to open the user record.
4 Click **Certificates**.
5 Select **View Achieved Certificates**. To include expired certificates, select**Show Expired Certificates**.
6 Click the certificate to view the it.
7 To see the user's transcript history for the certificate, click View History.

Granting certificates to users

When users complete the requirements of a certification program, a certificate is automatically awarded to them. You may need to manually grant certificates to individuals who join your organization and already have certificates or who meet other criteria for receiving certificates. Manually granting a certificate will allow you to enter a date for each certificate granted to a user.

To manually grant certificates to users:

1 Select **Users > Hierarchy level**.
2 Use the filter buttons and search functions to find the user.
3 Select the user in the results table to open the user record.
4 Click **Certificates**.
5 Select **Grant Certificates**.
6 To locate one or more certificates you want to grant to a user, use the search options or click **Show All** to display all certificates.
7 Select each certificate you want to grant to the user.
8 Specify the date the user passed the certification.
9 Click **Update**.

Assigning certification programs to users

To manually certification programs to users:

1 In the categories bar, select **Users**.
2 Select the appropriate level in the hierarchy.
3 Use the filter buttons and search functions to find the user.
4 Select the user in the results table to open the user record.
5 Click **Certificates**.
6 Click **Manage Certifications**.
7 Locate and select the program from the **Available certifications** programs list, and click **Assign**.
8 To remove a user enrollment from a certification program, locate the program in the **Assigned certification program** list, select that program, and click **Remove**

Managing user certifications

The**Remove Certificates** option allows you to remove a user's completed certificates from a given level. You have the option to remove the user’s certification history when you remove a certificate.

To remove user certificates:

1 Select **Users > Hierarchy level**.
2 Use the **Filter Buttons** and **Search** functions to find and select the user.
3 Click **Certificates**.
4 Select **Manage Certifications**.

a. To assign a new certification program to the user, select the program from the **Available certification programs** and click **Assign**.
b. To remove an existing certification program from the user, select the program from the **Assigned certification programs** and click **Remove**.

Resetting users certification programs

You can reset certification programs to enable users to re-certify for certificates that have expired or will expire soon. This allows the user to retake courses that are part of those certificates. Resetting the user’s certification programs will remove question responses contained in assessments and scores that are part of the certificate that the user earned. The system retains assessment scores that the user previously earned as history, but they will not count toward re-certification.

To reset certification programs for users:

1. In the categories bar, select **Users**.
2. Select the appropriate level in the hierarchy.
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click **Certificates**.
6. Select **Reset Certification Programs**.
7. Use search options to locate one or more certifications or click **Show All** to display all certification programs.
8. Select the number of days until the certification expires.
9. Select each certification program you want to reset.
10. To view the user's history for the certification program, click View History.
11. Click **Reset Certificate Users**, then click **OK** on the confirmation message.

Managing user's outside credits

Your Infor Learning Management courses should be the main source of training for your users. However, a well-rounded education may include knowledge from sources such as continuing education units, lectures, books, and miscellaneous assigned activities.

In addition to the credits users receive for passing their courses, you can also award them credits for completing these other modes of training.

To add, edit, or delete credits for completing training outside of Infor Learning Management:

1. Select **Users > Hierarchy level**.
2. Use the filter buttons and search functions to find and select the user.
3. Click **Outside Credits**.

4 To add an outside credit:

a Click **Add Outside Credit**.

b Select the credit from the outside credit **Name** list.

c Specify if needed, Outside Credit IMS ID, Description, Title, Score, Passed status, Credits Earned, Hours, Date Completed, Expiration Date, and attach any relevant files.

d Click **Add**.

5 To manage outside credit requests, select **Manage Outside Credits**.

6 To edit an outside credit request, click the **Edit** icon next to that credit, make the necessary changes, and click **Save**.

7 To approve an outside credit request, select the request and click **Approve**.

8 To deny an outside credit request, select the request and click **Deny**.

9 To delete an outside credit request, select the credit and click **Delete**. Click **OK** to confirm the deletion.

About authoring rights

By default, designating a user as an author grants them rights to download Content Creator and develop, publish, and retrieve courses. During the development process in Content Creator, authors will only be able to work with course-specific images, learning objects, and styles. Also, the **View Source** tab that allows HTML editing will be unavailable to them.

To allow authors to create and use system-wide images, learning objects, and style sheets, modify the Show Score page, or have access to HTML code, you must give them additional authoring rights. You can use **Edit Authoring Rights** on the user record to assign or remove these rights from an author.

Note: If you modify an author’s rights after they have retrieved their profile in Content Creator, the author will need to retrieve their profile again in order to activate the new rights.

Viewing users' authoring rights

To modify a user's authoring rights, see Editing users' authoring rights on page 70.

To view users' authoring rights:

1 In the categories bar, select **Users**.

2 Select the appropriate Level 2 or below in the hierarchy (this option is not enabled at the System level).

3 Use the filter buttons and search functions to find the user.

4 Select the user in the results table to open the user record.

5 Click **Authoring Rights**.

6 Select **View Authoring Rights**.

Editing users' authoring rights

To edit users' authoring rights:

1. In the categories bar, select **Users**.
2. Select the appropriate Level 2 or below in the hierarchy (this option is not enabled at the System level).
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click **Authoring Rights**.
6. Select **Edit Authoring Rights**.
7. Specify this information:

   System Wide
   Select to allow authors to access, modify, and share all repository items and the style sheets in the system.

   System Wide LO
   Select to allow authors to access, modify, and share all system-level learning objects.

   HTML
   Select to give advanced users access to the **View Source** tab and ability to edit the HTML code.

   Modify Show Score Page
   Select to allow authors to customize the score page in assessment modules.

   Note: To refine the rights of users who are given the System Wide or System Wide LO authoring rights, see Assigning content repository rights to authors on page 52 option.

8. Click **Update**.

Viewing authors' course list

You can the available courses that an author can retrieve from the server. These are courses an author published to the server and any courses that have been manually added to an author's course list.

To view authors' courses list:

1. In the categories bar, select **Users**.
2. Select the appropriate Level 2 or below in the hierarchy (this option is not enabled at the System level).
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click **Authoring Rights**.
6. Select **View Courses Author May Edit**.

Granting course editing rights to authors

Content Creator allows for multi-authoring, meaning that more than one author can retrieve and publish a course or parts of a course. If you want an author to be able to retrieve and edit a course that was not created by that author, you must add that course to the author's list of courses. Doing so adds the course title to the list of available courses that an author can retrieve from the server.

To add courses to authors' course list:

1. In the categories bar, select **Users**.
2. Select the appropriate Level 2 or below in the hierarchy (this option is not enabled at the System level).
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click **Authoring Rights**.
6. Select **Grant Editing Rights for Courses**.
7. Select each course you want to add to the author's list or click **Select All**. To reverse your current selections, you can also click **Invert Selection**.
8. Click **Add**.

Removing course editing rights from authors

If an author should no longer be able to edit a course, remove editing rights on the author record. This removes the course title from the list of courses the author can retrieve from the server.

To remove courses from authors' course list:

1. In the categories bar, select **Users**.
2. Select the appropriate Level 2 or below in the hierarchy (this option is not enabled at the System level).
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click **Authoring Rights**.
6. Select **Remove Editing Rights from Courses**.
7. Select each course you want to remove from the author's list or click **Select All**. To reverse your current selections, you can also click **Invert Selection**.
8. Click **Remove**, then click **OK** on the confirmation message.

Managing an instructor profile

Once a user has been assigned the instructor role, open the user's record and use the Manage Instructor Profile option to make the instructor available for scheduling, enter background information on the instructor, enable select parts of this information to display to users enrolling in the instructor's class, and select expertise for the instructor that can be used to simplify the process of assigning the instructor to appropriate courses.

If you have not yet added expertise relevant to the instructor whose profile you are managing, you can add an expertise. See Managing instructor expertise on page 50.

To modify an instructor profile:

1. In the categories bar, select **Users**.
2. Select the appropriate level in the hierarchy.
3. Use the filter buttons and search functions to find the user.
4. Select the user in the results table to open the user record.
5. Click **Instructor Options**.
6. Select **Manage Instructor Profile**.
7. To make the instructor available for scheduling, select **Active**.
8. Optionally, you can specify information about the instructor that can be useful when choosing an instructor for a course or helpful for users enrolling in a course to know. Such as:
   - Unique ID: Specify an ID for the instructor.
   - Biography: Specify the instructor's background information.
   - Education: Specify the schools the instructor attended.
   - Publications: Specify any papers or articles the instructor has published.
9. In the Show column, check the check boxes relevant to the information fields that should display to a user who is enrolling in the class.

   You can click **Select All** to select all fields for display or **Invert Selection** to switch all of the check boxes to the opposite of their current state (checked check boxes become unchecked and vice versa).
10. Click **Submit**.
11. To add an expertise to the instructor's profile, select it from the drop down list and click **Add**.
12. To remove expertise from the instructor's profile, select the expertise you want to remove and click **Remove**.

Viewing an instructor's schedule in calendar format

An instructor is assigned a classroom session by an administrator using the Course Management wizard.

To view an instructor's course schedule in a calendar format:

1. In the categories bar, select **Users**.

2 Select the appropriate level in the hierarchy.
3 Use the filter buttons and search functions to find the user.
4 Select the user in the results table to open the user record.
5 Click **Instructor Options**.
6 Select **Schedule -- Calendar View**.
   In addition to the instructor's schedule, enrollment, wait list, canceled enrollment, and credit information displays.
7 To change the month, click **<<** or **>>** .
8 To print the calendar, click **Print**.

Viewing an instructor's schedule in list format

An instructor is assigned a classroom session by an administrator using the Course Management wizard.

To view an instructor's course schedule in a list format:

1 In the categories bar, select **Users**.
2 Select the appropriate level in the hierarchy.
3 Use the filter buttons and search functions to find the user.
4 Select the user in the results table to open the user record.
5 Click **Instructor Options**.
6 Select **Schedule -- List View**.
7 To export this report in Excel format, click Export to Excel.

Viewing an instructor profile

You can review an instructor's active status, profile information, and expertise.

1 In the categories bar, select **Users**.
2 Select the appropriate level in the hierarchy.
3 Use the filter buttons and search functions to find the user.
4 Select the user in the results table to open the user record.
5 Click **Instructor Options**.
6 Select **View Instructor Profile**.

Reports

Infor Learning Management includes several reports detailing activities in the system broken down by users.

The **Users** category contains the following reporting options.

These tables show the reports available from the user record (**Users > User Name > Reports**).

Table 2: Standard reports

Report	Description
Scores - By Module on page 257	View a user's assessment scores by module within a ILM course
Scores - By Question on page 289	View a user's assessment scores by question within a course
Scores - External Tests on page 289	View a user's external test scores
Scores - Knowledge Gap on page 290	View a comparison of a user's Pre- and Post-Assessment scores within a ILM course
Sessions - Course on page 290	View total sessions and total online time for a user by course
Sessions - ILM Learner on page 291	View ILM Learner session statistics for a user
Sessions - Admin on page 290	View ILM Administrator session statistics for a user
Credits -- by User on page 288	View credits by user

Table 3: Dynamic reports

Report	Description
Curriculum Completion By User on page 263	View records of curricula completed by user
Certifications - By User on page 246	View records of certifications earned by user
Enrollment - By User on page 267	View records of enrollment in ILM courses by user
ILM Question Scores - By User on page 280	View records of ILM Questions scores by user
Course Scores - By User on page 271	View records of users' course scores
Score Summary - By User on page 275	View a summary of all of a user's course scores
External Assessment Scores - By User on page 273	View records of users' scores in external assessment tests
Online Course Sessions - By User on page 283	View records of users' sessions in online courses
ILM Assessment Scores - By User on page 277	View records of users' scores in ILM assessment tests

Report	Description
Curriculum Online Course Sessions - By User on page 281	View records of users' online course sessions within a selected curriculum

Courses

A list of all courses in levels that are assigned to the logged in Administrator is displayed by default when the **Courses** category is selected. To limit the courses to a specific level, select the level in the hierarchy. To filter the courses by a specific type or to search for a course by name, use the **Filter** option. Click a course tile to view the course details and course management options.

Course management wizard

With the Course Management Wizard, you can add and schedule a course from beginning to end. The wizard combines the two-part process of adding and scheduling a course into one fluid process.

This table shows the legend for inactive, canceled, and archived items:

Symbol	Meaning
[c] or ø	The item has been canceled.
¡	The item is inactive.
±	The item is archived.

1. Select **Courses > Hierarchy Level > Course Management Wizard**.
2. Begin the scheduling process by selecting whether you would like to **Create a New Course** or **Select an Existing Course**.

   If you choose, **Create a New Course**, click **Next**.

   If you choose **Select an Existing Course**, continue with these steps:

   a. To browse for an existing course, select either the **ILM Content Creator Course** or **Third Partly Online Course** check boxes to filter the search results based on how the course was created. Do not select both check boxes as they are mutually exclusive and no results will be returned.
   b. To search for a course by name, select either **Begins** or **Contains** and enter relevant text in the search field and click **Search**.
   c. Select a course.
   d. Click **Next**.
3. Specify this information:

Course Name
Course name is the name visible to users.

Course Short Name
The Course Short Name is used by administrators to identify the course internally. It is not visible to end users viewing the course.

Course Description
Specify course description.

Course Objectives
The Course Objectives field can help users focus on the central concepts within the course.

Audience
Specify the intended audience for the course.

Course Credit
Courses do not have to have credits assigned to them. If the course does not have any credits, you can leave the number at zero.

a Select the **Automatic Waitlist Removal** check box to remove a user from the waitlist when they are registered for another conflicting event.

b Select the language codepage from the **Codepage** item list. Codepage is a Microsoft designated indicator that represents a group of related languages.

This table shows the language groups that Infor Learning Management supports:

Codepage	Applicable Languages	LCID
Arabic	Arabic	14337
Baltic	Estonian	1061
	Latvian	1062
	Lithuanian	1063
Cyrillic	Bulgarian	1026
	Kazakh	1087
	Macedonian	1071
	Russian	1049
	Ukrainian	1058
Chinese (Simplified)	Chinese (Simplified)	2052
Chinese (Traditional)	Chinese (Traditional)	1028
Greek	Greek	1032
Hebrew	Hebrew	1037
Thai	Thai	1054
Japanese	Japanese	1041
Korean	Korean	1042

Codepage	Applicable Languages	LCID
Latin 1	Danish	1030
	Dutch (Netherlands)	1043
	English (United Kingdom)	2057
	English (United States)	1033
	Finnish	1035
	French (Canada)	3084
	French (France)	1036
	German (Germany)	1031
	Icelandic	1039
	Indonesian	1057
	Italian	1040
	Malay	1086
	Norwegian	1044
	Portuguese (Portugal)	2070
	Spanish (Mexico)	2058
	Spanish (Spain)	1034
	Swedish	1053
Latin 2	Croatian	1050
	Czech	1029
	Hungarian	1038
	Polish	1045
	Romanian	1048
	Slovenian	1060
Latin 5	Turkish	1055
Vietnamese	Vietnamese	1066

c To change the 32-digit unique identifier specify a value in the Course ID field.
d Specify the Duration and Duration Units.
e Select a visual display theme from the **Theme** item list.
f Specify the web address where third-party courses can be accessed in the Online URL field. This field is not required for ADL SCORM 1.2 courses.
g Select a standard from the **Content Integration** item list to use in launching third-party courses.
h Select the **Hide SCORM Navigation Frame** check box to enable this option.
i Select the **Hide SCORM Left Navigation Frame** check box, if applicable, to enable this option.
j Select the **Refresh Portal Course List After Exiting Course** check box to enable this option.
k To utilize ILM integration, select **Saba AICC : 2.0** from the **ILM Integration** item list.
l To enable exclusive editing, select the **Exclusive Editing** check box.
m To specify a custom prerequisite, select it from the **Custom Prerequisite Name** item list.

- n Specify the name of the course event in the Event Name field.
- o Select an event template from the **Event Template** item list.
- p To add the course to all sub-levels, select the **Add Course to children** check box.
- q To add the event to all sub-levels, check the **Add Event to children** check box.
- r Select options for any Custom Fields that may exist.
- s Click **Apply** to save your changes.
- t To return to the previous step, click **Back**.
- u Click **Next**.

4 Select **Create a New Event** or **Select an Existing Event**.

If **Create a New Event** is selected, click **Next**.

If **Select an Existing Course** is selected, follow these steps:

- a Narrow your event search results with the filters provided.
- b To search for events between specific dates, clear the **All Dates** check box and select your dates.
- c To include archived events in your search results, select the **View Archived Events** check box.
- d To search for a course by name, specify text in the search field and click **Search**.
- e Select the event.
- f If you want to return to the previous step, click **Back**.
- g Click **Next**.

5 To specify additional event details:

- a To change the selected event or to add a new event, select it from the **Event** item list.
- b If you selected **Add New Event**, follow these steps:
  - **1** To use an event template, select the template from the **Event Template** item list.
  - **2** Specify an Event Name.
  - **3** Specify any Notes.
  - **4** Select options for any Custom Fields that may exist.
  - **5** Select **Apply** to save the event information.
- c To cancel an active event, click Cancel Event. If the event is already canceled, click Reinstate Event to activate it again.

  Events that have been canceled will be labeled as such on subsequent steps within the Course Management Wizard and relevant functionality will be disabled.
- d To add an e-meeting component to a classroom course, click Add e-Meeting. The **Create e-Meeting** window is displayed.
- e Specify the relevant information.
- f To assign custom field values, select options for any Custom Fields that may exist.
- g Click **Apply**.
- h Click **Next** to continue or **Back** to return to the previous step.

  When the Event Change notification has been enabled through the System settings, a Send Change Notification link is displayed in the Content Area. Upon clicking Send Change Notification, a **Change Description** window is displayed. Specify text explaining what has changed in the event. The Change Description text will be included in the body of the email notification sent to the users who are registered for the event. The notification will be sent after **Submit** is clicked.

6 To add file attachments:

a To change the selected event, select a different event from the **Event** item list.
b Locate and upload the file(s).
c To view an attached file or download a copy of it, click the file name.
d To remove a file, select the check box and click **Delete**.
e To select where the file should be used, select the check box beside the relevant areas. The file can be set to **Show In Portal** and to be attached to a variety of notifications that are sent to users.
f Click **Apply**.
g Click **Next** to continue or **Back** to return to the previous step.

7 To modify e-Learning components:

a To change the selected event, select a different event from the **Event** item list.
b Select the **ILM Portion** check box or the **Online Portion** box.
c Specify the course dates in the **Scheduled** fields or select the **Always Available** check box.
d Click **Apply**.
e Click **Next** to continue or **Back** to return to the previous step.

8 To schedule the event classroom portion:

a To change the selected event, select a different event from the **Event** item list.
b To begin scheduling the classroom portion of the event, click the **Classroom Portion** check box .
c Select either **Add Single Session** to schedule a classroom portion that will be conducted in a single day or select **Add Multiple Sessions** to schedule a classroom portion that will be conducted across multiple days.
d Specify the times and dates for the classroom portion.
e If this is a multiple session portion, select the check boxes next to the days of the week when the sessions will take place during the specified time period.
f To find and assign a facility room for the classroom portion, click **Lookup**. The **Room Search** window is displayed.

1 Select a room level from the Facilities Hierarchy.
2 Specify the minimum number of needed seats.
3 Select the items needed in the room for the classroom portion:

a Select an item needed in the room for the classroom portion from the **Item** item list.
b Specify a quantity.
c Click **Add**.

4 Click **Show Rooms**. The rooms that meet your requirements are displayed.
5 Click a room. Room Information is displayed.
6 Click **Select Room**.

g To remove an existing room, click **Clear**.
h To find and assign an instructor for the classroom session, click **Lookup**. The **Instructor Search** window is displayed.

1. Specify parameters and click **Show Instructors**. A list of instructors that meet the parameters is displayed.
2. Click an instructor. Instructor Information is displayed.
3. Click **Select Instructor**.
4. Click **Close Window**.

i To remove an instructor, click **Clear**.

j Specify a description.

k Click **Add**. If this is a multiple-session event, click **Generate Schedule**.

l To delete a classroom session, select its check box and click **Remove Sessions**.

m To view session information for a specific day, click the session. Information for that day is displayed in the fields.

1. Edit the fields.
2. Click **Update**. Your changes are saved.

n Click **Next** to continue or **Back** to return to the previous step.

9 To specify the event enrollment details:

a To change the selected event, select a different event from the **Event** item list.

b Specify the following information:

Min Enrollment
Specify the minimum number of people required for the classroom portion.

Max Enrollment
Specify the maximum number of people allowed for the classroom portion.

Max Waitlist Users
Specify the maximum number of people that can join the waitlist.

Automatic Enrollment from Waitlist Deadline
Specify the latest date on which users can be moved from the waitlist to the enrollment list.

Registration
Specify the start and end dates for the period during which users can register for the event.

Self Cancellation Deadline
Specify the latest date when users can cancel themselves from the event.

Event Available Days
Specify the number of days it should be available.

c Select the **Automatically mark attendance for event participants** check box to mark attendance event participants automatically.

d Select the **Automatically mark credit for event participants** check box to mark credit for event participants automatically.

e Click **Apply** to save changes.

f Click **Next** to continue or **Back** to return to the previous step.

10 To specify the event completion deadline:

a To change the selected event, select a different event from the **Event** item list.

b To set a completion deadline, select the **Enable Completion Deadline** check box.

c Select either a specific date or a variable date for the deadline:

- Select **Completion Deadline** to set a specific completion deadline date. Specify a specific date or use the Calendar to select the date for the completion deadline.
- Select **X days based on** to set a variable date for the completion deadline.
  1. Specify the number of days after the trigger event that will be used to set the completion date.
  2. Select either Event Registration date or First access date from the drop down list to specify which of these two will be used to establish the completion deadline.
     Note: You can select **Reset completion deadline when the course is reset for the user Completion Criteria** only when **Number of days based on First Access Date** is selected
  3. To have Infor Learning Management reset the user's completion deadline if the course is reset for the user, select the **Reset completion deadline** check box.

d To specify the completion criteria, select **User Must Earn a Score or Credit** or **User Must Earn a Passing Score or Credit**.

e To allow users to begin the course after the deadline has passed, select the **Allow Users to Launch Course After Deadline is Passed** check box.

f In the Start sending reminders field, specify the number of days prior to the completion deadline that Infor Learning Management reminders should be sent to users about the approaching deadline. No reminder will be sent if the value is set to "0".

g In the Resend the reminder field, specify the number of days that the reminder should be sent. No reminder will be sent if the value is set to "0".

h Specify the Reminder Text to be sent to the user along with the default reminder message.

i To send reminders to additional e-mail addresses, select either **CC** or **BCC** to set how the email will be sent and specify the e-mail message in the text area.

j Click **Apply**.

k Click **Next** to continue or **Back** to return to the previous step.

11 To add or remove the course and events from levels.

a To have an event added to other levels along with the course, select the desired event from the **Event** item list.

b To add the course or the event to specific levels, select the check box for level name. If necessary, click the + next to the level name to display its sub-levels.

c To add the course or the event to all levels below a specific level:

1. Select the level name below which the course should be added. This level name is highlighted.
2. Select **Add Course to All Levels Below Selected Level**. If an event has been selected, the radio button will say "Add Event" instead of "Add Course".
3. Click **Apply**.

d To remove the event or course follow these steps. You will not be able to remove events from levels where the event is default. These events will be indicated with an icon.

- To remove **only** the event from a specific level:
  1. Select the event from the **Event** item list.
  2. Clear the check box next of the level.
- To remove **only** the event from all levels below a selected level:
  1. Select the event from the **Event** item list.

2. Select the name of the level below which the event should be removed. The level name is highlighted.
3. Click **Remove Event From All Levels Below Selected Level**.
4. Click **Apply**.

- To remove **both** the course and the event from a specific level:
  1. Select **None** from the **Event** item list.
  2. Clear the level's check box.
- To remove **both** the course and the event from all levels below a selected level:
  1. Select **None** from the **Event** item list.
  2. Select the name of the level. The level name is highlighted.
  3. Select **Remove Course From All Levels Below Selected Level**.
  4. Click **Apply**.

e. To send a change notification:
   1. Click Send Change Notification. The **Change Description** window is displayed. This is only available if the notification is enabled in the System category.
   2. Specify a description of what has changed. This text will be included in the body of the email notification that will be sent to users registered for the event.
   3. Click **Submit** to send the change notification or, if you want to change it, click **Clear**. If you no longer wish to send the change notification, click **Cancel**.

f. Click **Next** to continue or **Back** to return to the previous step.

12 To change event properties by level.

a. To change the selected event, select a different event from the **Event** item list.
b. Click the level name in the tree view.
c. Select **Apply Selections below to the Selected Level** or **Apply Selections below to all Levels below the Selected Level**.
d. Select the **Make Course Default** check box, if the course is default.
e. Select the **Make Event Default** check box, if the event is default.

   Events can only be made default at Level 2 or below. Events with a scheduled classroom portion cannot be default. Classroom portions of events cannot be enabled for default events.

   If a level-specific event is marked as default, the user must still register for the course. The default event feature is primarily used to assist the system administrator. When the system administrator marks a level-specific course as default, they will not have to assign each user in that level to the default event.

f. To allow users to self register for the event, check the **Self Registration Available** check box.
g. To require manager approval for users who register for the event, check the **Approval Required for Registration** check box.
h. To allow users to remove themselves from the event without approval from a manager, check the **Self Cancellation Deadline** check box.
i. To require users to pay a fee when removing themselves from the event, specify the deadline date or select **Always Available**.
j. Specify the date range for the course **Evaluation Dates** or select **Always Available**. The learners can see the Evaluation icon only when they are enrolled in the course and based on the availability settings.

- k To send a Waitlist Notification to users on waitlists for other events of the same course, click Notify users waitlisted for other events of this course.
- l To send a change notification:
  1. Click Send Change Notification. This is only available if the notification is enabled in the System category. The **Change Description** window is displayed.
  2. Specify a description of what has changed.
  3. Click **Submit** to send the change notification or, if you want to change it, click **Clear**. If you no longer wish to send the change notification, click **Cancel**.
- m Click **Apply**.
- n Click **Next** to continue or **Back** to return to the previous step.

13 To set event price by level.

- a To change the selected event, select a different event from the **Event** item list.
- b Select the name of the level. The level name is highlighted.
- c Click **Apply selections below to the selected level** or **Apply selections below to all levels below the selected level**.
- d Specify the price in **Amount**.
- e Select the currency code from the **Currency** item list.
- f Click **Apply**.
- g To send a Waitlist Notification to users on waitlists for other events of the same course, click Notify users waitlisted for other events of this course.
- h To send a change notification:
  1. Click Send Change Notification. This is only available if the notification is enabled in the System category. The **Change Description** window is displayed.
  2. Specify a description of what has changed.
  3. Click **Submit** to send the change notification or, if you want to change it, click **Clear**. If you no longer wish to send the change notification, click **Cancel**.
- i To set prices for other levels, repeat these steps.
- j Click **Next** to continue or **Back** to return to the previous step.

14 To complete wizard, click **Make Course Active**.

Importing a course

You can add courses that have already been created.

Shareable Content Object Reference Model (SCORM) and Aviation Industry CBT Committee (AICC) are the industry standards for computer based training. SCORM’s central focus is to enable sharing of SCORM– compliant content across different Learning Management Systems, to accommodate different learner requirements. AICC is an association of technology-based training professionals that develops guidelines for the development, delivery, and evaluation of computer based training. AICC has developed 11 Guidelines & Recommendations (AGR’s) for computer based training.

You can purchase off-the-shelf courses that are compliant with SCORM and AICC standards from third-party vendors. This can save you internal development time and money, and can be extremely helpful in obtaining generic libraries of courses.

With Infor Learning Management you can import and begin a variety of these SCORM and AICC 1.2 compliant courses. This is done by uploading and importing individual or multiple courses through Infor Learning Management Administrator. Once this process is complete, administrators can easily schedule and track these courses just like any Infor Learning Management course. During the import process the course name and course description field are populated with information. These third-party vendor courses are known as online courses in Infor Learning Management. In order to launch online courses, the online portion of the event must be enabled through the Course Management Wizard.

Upon upload from a .zip file or a URL, the file will be opened and the files will be stored on the server in the Repository\Online\SCORM directory with the name of the zip file. Upon import completion, the inactive course is added to Infor Learning Management and an event is created with the following properties:

- Event Name: Name of the Course with “Event” at the end
- Registration: Always Available
- Self Cancellation: Always Available
- Online Portion: Always Available
- Self-Registration: Available in the Level 2 where course was imported

To import a course:

1. Select **Courses > Hierarchy Level > Import Course**.
2. To make the course(s) inactive after the import, select **Make Course Inactive**.
3. To add an event template to the course select the template from the **Add Event** list.
4. To import one or more SCORM or AICC courses from a .zip file, in the SCORM / AICC section:
   a. Click **Browse file** to locate and select the zip file containing the course(s).
   b. Click **Import Course(s)**.
5. To import a single SCORM course from a URL, in the SCORM (only) section:
   a. Specify the full URL, including the file name and file type extension, in the **Manifest URL** field.
   b. Click **Import Course(s)**. The **name change confirmation** window is displayed.
6. Click **OK**. The **passing score confirmation** window is displayed.
7. If the imported course is in SCORM 1.2 format, click **OK**. The **import completion** window is displayed.
8. Click **OK**.

Adding existing courses to the current level

Once a course has been published fromInfor Learning Management Content Creator to the Live server or you have added a classroom or online course to Infor Learning Management, you can add the existing course to any other level using the **Add Existing Courses to the Current Level** option. After you add the existing course to the current level, you also have the option to add any events that exist within that course to the current level as well.

Follow these steps to add an existing course to the current level:

1 Select **Courses > Hierarchy Level 2 or below > Add Existing Courses to the Current Level**.
2 To locate one or more courses, use the Search options or click **Show All**. All available courses are displayed.
3 To only view courses that exist in the level above the currently selected level, select **Only show courses in parent level**.
4 Select the check box for the course. If you select a course that is not in the parent level of the current level, the course will be added to all levels between the current level and the level where the course does exist.
5 Click **Submit**.
6 To add any events that are associated with the courses you just added, select the check box for the events. Click **Select All** to select all events or **Invert Selection** to reverse the current selections.
7 Click **Submit**.
8 To return to the first screen and select additional courses to add to the current level, click **Back to courses add existing**.

Removing courses

Use **Remove Courses** to remove one or more courses from the current level.

Caution: If this option is used at the System level the course will be deleted from Infor Learning Management and it cannot be recovered, so be very careful with your Hierarchy selection when using this option.

Follow these steps to remove courses:

1 Select **Courses > Hierarchy Level > Remove Courses**.

   Caution:

   Removing a course from either the System level will delete the course from Infor Learning Management

   Courses that have been deleted in this way cannot be restored and all associated user information and reports will be lost, so proceed with caution.

2 To locate courses, use the Search options or click **Show All** to display all courses in the selected level.
3 Select the check box for each course that you wish to remove.
4 Click **Remove**. The confirmation dialog box is displayed.
5 Click **OK**.

Course publishing wizard

Use **Course Publishing Wizard** to publish one or more Infor Learning Management courses from the edit server to the live server through Infor Learning Management Administrator.

To use the Course Publishing Wizard:

1 Select **Courses > Hierarchy Level 2 > Course Publishing Wizard**.

2 Specify this information:

   ILM Live Server URL
   Specify the URL of the Infor Learning Management Live Server. Do not include "http://" in the URL.

   ILM Live Server author username
   Specify the username of the course author.

   ILM Live Server author password
   Specify the password of the course author.

3 Click **Next**.

4 To narrow down the list of displayed courses, specify search text in the field and click **Filter**.

5 Select the check boxes for the courses.

6 To make changes to previously specified information click **Back**.

7 To abort the publishing process click **Cancel**.

8 Click **Next**.

9 To select the levels at which each course will be published:

   a Click **Select Level**.

   b Select the check box for the hierarchy level.

   c To have Infor Learning Management also publish the course at all levels below the selected level, select the **Automatically check/uncheck sub-levels** check box.

   d Click **Save** or to abandon your changes, click **Cancel**.

10 Click **Next**.

11 To have the publishing process abort if it encounters an error, select the **Stop on error** check box.

12 To abort the process without publishing, click **Cancel**.

13 To return to a previous step to make changes, click **Back**.

14 To begin the publishing process, click **Start**.

15 To manually cancel the publishing process while it is running, click **Cancel**.

16 To review the results of the publishing process for each course, click Log File.

17 Click **Close** to exit the wizard.

Courses distribution

Use **Course Distribution** to specify user attributes that the system will use as criteria to automatically distribute curricula to users. You can automatically assign curricula to users instead of assigning it to them manually one-by-one or making a curriculum default for a level.

1. Select **Courses > Hierarchy level 2 >** Courses Distribution.
2. To manually begin the distribution process, click **Run**.
3. To view process history, click Distribution Process Log.

Manage evaluations and surveys

Evaluations and surveys can be added to the courses and used for various purposes such as research, course feedback, and reports.

Evaluations are generally used for course feedback upon completion of the course. They must follow a format of a question and five rating-based responses. The Evaluation reports calculate results based on averaging the user's responses to different questions.

Surveys are similar to evaluations but the number of the responses is not limited. The responses can be created as dropdown lists or multiple choice selections. The Survey reports present the data based on how many users selected each response.

Adding an evaluation set

An Evaluation Set contains one or more questions. You must add evaluation questions to an evaluation set before you can add the evaluation set to a course. This is accomplished with **Add Evaluation Set**.

To add an evaluation set:

1. Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Add Evaluation Set**.
2. Specify a name for the evaluation set.
3. Click **Create** to complete the process or **Reset** to undo changes.

Editing an evaluation set name

After you create an evaluation set, you can rename it using the Edit Evaluation Set option. This is only available at the System level.

To edit an evaluations set name:

1. Select **Courses > System Hierarchy Level > Manage Evaluations and Surveys > Edit Evaluation Set Name**.

2 Select an evaluation.
3 Specify a new name.
4 Click **Update**.

Managing evaluation set questions

You can use **Manage Evaluation Set Questions** to change the order in which the questions will be presented or to remove questions from the evaluation set.

To manage evaluation set questions:

1. Select **Courses > Hierarchy level > Manage Evaluations and Surveys > Manage Evaluation Set Questions**.
2. Select an evaluation.
3. Modify the question sequence:
   a. Specify the sequence in which the questions should be presented in the fields.
   b. Click **Update**.
4. To remove questions from the evaluation set:
   a. Select the check box next to each question you wish to remove. You can also click **Select All** to select all listed questions or **Invert Selection** to reverse your current selections.
   b. Click **Remove**.

Removing evaluation set

Use **Remove Evaluation Set** to remove an evaluation set from Infor Learning Management.

Caution: Once you delete an evaluation set you cannot restore it. Deleting an evaluation set also deletes all associated user responses. Proceed with caution.

To remove an evaluation set:

1. Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Remove Evaluation Set**.
2. Select an evaluation set.
3. Click **Delete**. The confirmation dialog box is displayed. Click **OK**.

Copying an evaluation set

Use the Copy Evaluation Set option when you want to create a new evaluation set that is identical to an existing set. This can be useful when you want to create a set that is slightly different from an existing one.

To copy an evaluation set:

1 Select **Courses > Hierarchy Level > Manage evaluations and surveys > Copy evaluation set**.
2 Select the evaluation set from the **Name** item list.
3 Specify the name of the new evaluation set.
4 Click **Copy Set**.

Setting default evaluations

You can set one or more evaluations or surveys as default in the system using **Set Default Evaluations**.

Caution: This setting applies across the entire system, not per level, so any evaluations or surveys that you set as default will be assigned to all courses that currently exist or that are created in the future.

To set default evaluations:

1 Select **Courses > Manage Evaluations and Surveys > Set Default Evaluations**.
2 Select the check boxes for the default evaluations.
3 If multiple selections are made, you may determine the order in which they will be displayed to users by specifying sequence numbers in the fields in the Order column.
4 Click **Update**.

Adding evaluation/survey instructions

Use **Add Evaluation/Survey Instruction** to add a text screen with information about the evaluation or instructions on how to complete it.

To add evaluation/survey instruction:

1 Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Add Evaluations/Survey Instruction**.
2 Specify the name of the instruction and text.
3 Click **Create** or, to undo changes, click **Reset**.

Adding a new evaluation question

Use **Add New Evaluation Question** to add a new evaluation question to Infor Learning Management. Evaluation questions must be added to Infor Learning Management before they can be added to an evaluation set.

To add a new evaluation question:

1 Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Add New Evaluation Question**.
2 To use an existing response set as a template for your responses, select it from the **Response set** item list. The previously created set of responses are filled into the Response fields. You can edit this text without changin the original responses saved in the response set.
3 Specify a title, the question, and the responses. All five response fields must contain a value.
4 Click **Create** or, to undo your changes, click **Undo**.

Editing evaluation question

Use **Edit Evaluation Question** to modify the Question Title, Question Text, or Responses for an existing evaluation question. You may also use this option to delete the evaluation question from Infor Learning Management.

Caution: Once you delete an evaluation question you cannot restore it. Deleting an evaluation question also deletes all associated user responses. Proceed with caution.

To edit an evaluation question:

1 Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Edit Evaluation Question**.
2 Select a question.
3 To permanently delete the question, click **Delete**. A confirmation dialog box is displayed. Click **OK**.
4 Edit the question title, text, and responses.
5 To use an existing response set to populate the Response fields, select it from the **Select Response Set** item list.
6 Click **Update** to complete the process or click **Reset** to revert to the previously saved information.

Adding an evaluation response set

Each multiple-choice question in an evaluation has an associated response set that must consist of five options. The Add Evaluation Response Set option lets you create a response set that can be used repeatedly with evaluation questions. By doing this, you will not have to re-type the responses for evaluation questions that incorporate the same responses.

To add an evaluation response set:

1 Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Add Evaluation Response Set**.
2 Specify a name and the responses.
3 Click **Add** to complete the process, or to clear all fields, click **Reset**.

Modifying an evaluation response set

Use the Modify Evaluation Response Sets option to make changes to an existing evaluation set or to delete it.

Caution: Once you delete a response set you cannot restore it. Proceed with caution.

To modify an evaluation response set:

1. Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Modify Evaluation REsponse Sets**.
2. Select a response set.
3. To delete the selected response set, click **Delete** then click **OK** on the confirmation dialog box.
4. To change the name or individual responses, specify your text in the fields.
5. Click **Update** to complete the process or click **Reset** to revert to the previously saved information.

Adding existing questions to an evaluation

After creating your evaluation questions, use **Add Existing Questions to Evaluation** to add the questions to an evaluation set.

To add existing questions to an evaluation:

1. Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Add Existing Questions to Evaluation**.
2. Select an evaluation set.
3. Select the check box for the questions. You can also click **Select All**. To reverse your existing selections, click **Invert Selection**.
4. Click **Add** to complete the process.

Adding a survey set

Use **Add Survey Set** to create a new survey set. Once you have created the survey set you must add survey questions to it before you can add it to a course.

To add a survey set:

1. Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Add Survey Set**.
2. Specify a name.
3. Click **Add**.

Adding a new survey question

Use **Add New Survey Question** to add new survey questions to Infor Learning Management.

To add a new survey question:

1. Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Add New Survey Question**.
2. Make a selection from the **Question Type** item list.
3. Specify the name and question text.
4. Click **Create** to complete the process, or to start over, click **Reset**.

Adding existing questions to a survey set

After a survey set has been created you can add questions to it. **Add Existing Questions to Survey Set** lets you add existing questions to survey sets.

To add an existing question to a survey set:

1. Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Add Existing Questions to Survey Set**.
2. Select a survey set.
3. Select the check box for the question. You can select all questions by clicking **Select All**. To reverse your selections, click **Invert Selection**.
4. Click **Add**.

Modifying a survey set

After creating a survey set and adding questions to it, you can reorder or remove these questions with **Modify Survey Set**.

To modify a survey set:

1. Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Modify Survey Set**.
2. Select a survey set.
3. To modify the sequence of the questions in the survey set specify the sequence in which the questions should be presented and click **Update**.
4. To remove one or more questions from the survey set, select the check box for each question and click **Remove**.

Editing the survey set name

After you create a survey set, you can use **Edit Survey Set Name** to rename it.

To edit a survey set name:

1 Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Edit Survey Set Name**.
2 Select a survey set.
3 Specify a new name and click **Update**.

Removing a survey set

Use **Remove Survey Set** to completely delete a survey set.

Caution: Once you delete a survey set you cannot restore it. Proceed with caution.

To remove a survey set:

1 Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Remove Survey Set**.
2 Select a survey set and click **Delete**. The confirmation dialog box is displayed. Click **OK**.

Copying a survey set

Use **Copy Survey Set** when you want to create a new survey set that is identical to an existing set. This can be useful when you want to create a set that is slightly different from an existing one without having to create the new set from scratch.

To copy a survey set:

1 Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Copy Survey Set**.
2 Select a survey set from the **Name** item list.
3 Specify a name for the new survey set and click **Copy Set**.
4 After you have created the new survey set, use Modifying a survey set on page 93 to change the order in which questions will be asked or to remove specific questions.
5 To add questions to the set, see Adding existing questions to a survey set on page 93.

Editing a survey question

Use **Edit Survey Question** to modify the Question Name, Question Text, or Response Set for a survey question.

To edit a survey question:

1 Select **Courses > Hierarchy Level > Manage Evaluations and Surveys > Edit Survey Question**.
2 Select a survey question.
3 To delete the question, click **Delete**.

Caution: Once you delete a survey question you cannot restore it. Proceed with caution.

4. To change the question type, select the new type from the **Question Type** item list.
5. Specify a new title and text.
6. Click **Update** to complete the process, or to start over, click **Reset**.

Viewing checked out courses

Use **Checked Out Courses** to see which courses are currently retrieved and who has retrieved them.

To view checked out courses:

1. Select **Courses > Hierarchy Level > Manage Course Content Repository > Checked Out Courses**.
2. Select a course. If the course or a section of the course is checked out, a check box is displayed with the name of the author who has the course retrieved.
3. To check a course back into Infor Learning Management, select the check box of the course and click **Check In**.

Viewing checked out learning objects

Use **Checked Out Learning Objects** to see which learning objects have been retrieved from Infor Learning Management and who has retrieved them.

To view checked out learning objects:

1. Select **Courses > Hierarchy Level > Manage Course Content Repository > Checked Out Learning Objects**.
2. The learning objects are displayed. If a learning object is currently checked out, a check box will appear next to the name of the learning object along with the name of the author who has retrieved it.
3. To check a learning object back into Infor Learning Management, select the check box and click **Check In**.

Viewing learning object usage

Use **View Learning Object Usage** to view where learning objects are being used in individual courses, levels, or the entire system.

To view learning object usage:

1 Select **Courses > Hierarchy Level > Manage Course Content Repository > View Learning Object Usage**.
2 Select the scope of the learning object from the **View Learning Objects Usage** item list.
3 Click the learning object name. The **LO Usage Details** window is displayed with additional information about the learning object.

Viewing checked out style sheets

Use **Checked Out Style Sheets** to view whether a style sheet is currently retrieved and, if so, which author has retrieved it. If a style sheet is retrieved, this option can be used to check it back into Infor Learning Management.

To view checked out style sheets:

1 Select **Courses > Hierarchy Level > Manage Course Content Repository > Checked Out Style Sheets**.
2 If a style sheet is currently checked out, a check box will appear next to the name of the style sheet along with the name of the author who has retrieved it. To check a style sheet back into Infor Learning Management, check the check box next to the style sheet and click **Check In**.

Viewing stylesheet usage

Use **View Style Sheet Usage** to view style sheet usage.

To view style sheet usage:

1 Select **Courses > Hierarchy System Level > Manage Course Content Repository > View Style Sheet Usage**.
2 Select the scope of the learning object from the **View Style Sheet Usage** item list.
3 View the information.

Managing content repository

Use **Manage Content Repository** to add, remove, or rename folders and to restore deleted items.

To manage the content repository:

1 Select **Courses > Hierarchy Level 2 or below > Manage Course Content Repository > Manage Content Repository**.
2 Select a folder to edit it.

3 To add a folder to the Content Repository:
   a Select the existing folder under which the new folder should be created.
   b Specify the name of the new folder in the field.
   c Click **Add**.
4 To change the name of a folder in the Content Repository:
   a Select the folder that you wish to rename.
   b Specify the new name of the folder in the field.
   c Click **Rename**.
5 To remove a folder from the Content Repository:
   a Select the folder.
   b Click **Delete Selected Folder**.
6 To restore deleted items to the Content Repository:
   a Select the level that contains the deleted items.
   b Select the check boxes for the deleted items.
   c Click **Restore Selected Items**.

Manage event templates

Event templates are stored templates that can be reused to automate the process of creating new events in the system. Administrators can create and save any number of templates for future use. File attachments can also be saved when creating an event template. When an event template is created it is not associated with any one particular course. Event templates are not level specific. Use this page to add, edit, or remove templates.

Use **Add Template** to add event templates to Infor Learning Management. Event templates can be created at any level. Any course published from Infor Learning Management Content Creator can have a default event automatically created. A default event template must be selected in the **Publish all courses with a default event template** item list located in the Content Creator section of Working with common features on page 296.

Level-specific information options are applied to events in ALL Level 2 levels.

Use **Edit Event** to change any of the specifications for an event template.

Use **Remove Template** to remove an event template.

Use **Template Files** to attach files to event templates. You can attach PDF, MS Word, PowerPoint, image, and multimedia files. The files will be associated to a new event that is created using the event template. This is a system-wide feature and an existing event template is required before attaching files. There are check boxes to attach the template to notifications and to the Infor Learning Management Portal:

- **Show In Portal**
- **Event Modification**
- **Event Cancellation**

- **Event Reinstate**
- **Event User Registration**
- **Event User Cancellation**
- **Event Reminder**
- **Post Event Notification**

Adding event templates

Use **Add Template** to add event templates to Infor Learning Management.

To add a template:

1. Select **Courses > Manage Event Templates > Add Template**.
2. Specify a name for the template and any relevant information about the event.
3. Select or specify the Registration period or select the **Always Available** check box.
4. Select or specify a Self Cancellation Deadline or select the **Always Available** check box.
5. To create an event template for an Infor Learning Management course, select the **ILM Portion** check box and specify the scheduled dates or select the **Always Available** check box.
6. To create an event template for a third-party course, select the **Online Portion** check box and specify the scheduled dates or select the **Always Available** check box.
7. To create an event template for an instructor-led course, select the **Classroom Portion** check box and specify this information:

   Min Enrollment
   Specify the minimum number of users that must be enrolled.

   Max Enrollment
   Specify the maximum number of users that can be enrolled.

   Max Waitlist Users
   Specify the maximum number of users that can be on the waitlist or select the **No Maximum** check box.

   Automatic Enrollment From Waitlist Deadline
   Specify the date on which users will be automatically moved from the waitlist to the classroom event list or select the **Until Event Start Date** check box to have users moved from the waitlist to the classroom event on the start date.

   Cancellation Fee Deadline
   Specify the date after which users will be charged a cancellation fee or select the **Always Assign Fee** check box.

   Cancellation Fee Amount
   Specify the cancellation fee.

8. Select the **Automatically mark attendance for event participants** check box to mark attendance event participants automatically.

9. Select the **Automatically mark credit for event participants** check box to mark credit for event participants automatically.
10. To set a completion date, select the **Enable Completion Deadline** check box.
    a. To set a fixed completion deadline, click **Completion Deadline** and specify a date.
    b. To set a variable date, click **days based on** and specify a number of days. Select either **Event Registration Date** or**First Access Date** from the item list.
    c. To have the completion deadline reset when the course is reset for the user, select **Reset completion deadline when the course is reset for the user** check box.
    d. To set the Completion Criteria, click either **User must earn a score or credit** or **User must earn a passing score or credit** to determine which of these conditions must be met to complete the event.
    e. Specify the following information:

       Start sending reminders
       Specify the number of days prior to the completion deadline that the user should be reminded. If "0" is specified, no reminders will be sent.

       Resend the reminder
       Specify the number of days for which the reminder should be resent. If "0" is specified, the reminder will not be sent again.

11. Specify the Reminder Text and the addresses to which it should be sent.
12. To send a reminder for the start of the event, specify the number of days before the event start date that you want users to receive the first event reminder notification in the First Reminder field. If "0" is entered, no reminder will be sent.
13. To send a second reminder for the start of the event to users, specify the number of days before the event start date that you want users to receive a final event reminder notification in the Last Reminder field. If "0" is entered a second reminder will not be sent.
14. To send a post-event notification to users, specify the number of days after the event that you want to send the post event notification and select the event portion type from the item list.
15. To require approval for event enrollment from the users' manager, select the **Approval Required** check box.
16. To allow users to enroll themselves in the event through the Infor Learning Management Portal, select the **Self Registration Available** check box.
17. To allow users to withdraw themselves from the event through the Infor Learning Management Portal, select the **Self Cancellation Available** check box.
18. To charge users for withdrawing from the event select the **Charge Cancellation Fee** check box and specify a price..
19. Click **Add**.

Editing an event template

Use **Edit Event** to change any of the specifications for an event template.

To edit an event template:

1 Select **Courses > Manage Event Templates > Edit Template**.
2 Select a template.
3 Edit the template. For more information on each option, see Adding event templates on page 98.
4 Click **Update**.

Removing templates

Use **Remove Template** to remove an event template.

Note:

Default templates are permanent and cannot be removed. They are used to add an event when a new course is published from Content Creator.

To remove an event template:

1 Select **Courses > Manage Event Templates > Remove Template**.
2 Select a template.
3 Click **Remove**. The confirmation dialog box is displayed. Click **OK**.

Attaching template files

Use **Template Files** to attach files to event templates.

To attach files to event templates:

1 Select **Courses > Manage Event Templates > Template Files**.
2 Select a template.
3 Click **Browse** to locate the file. The path to the file is displayed in the field.
4 Click **Upload**. A notification is displayed that the file was successfully uploaded.
5 You can attach the event template file to a notification or have it displayed in the Infor Learning Management Portal by selecting a check box.
6 Click **Update**.

Deleting template files

You can delete template files that are no longer needed.

To delete a template file:

1 Select **Courses > Manage Event Templates > Template Files**.
2 Select a template.
3 Select the **Delete** check box for the file.
4 Click **Delete**.

Adding learner themes

Use **Add Theme** to upload a new custom theme to Infor Learning Management.

To add a new learner theme:

1. Select **Courses > Hierarchy System Level > Manage Learner Themes > Add Theme**.
2. Specify the theme name, description, and DocType.
3. Click **Browse** and select the zip file with the desired theme.
4. Click **Add**.

Editing learner themes

Use **Edit Theme** to modify existing custom themes. Themes provided by Infor cannot be edited.

To edit a learner theme:

1. Select **Courses > Hierarchy System Level > Manage Learner Themes > Edit Theme**.
2. Select a theme.
3. Specify a theme name and theme description.
4. To change the theme itself, click **Browse** and select the zip file.
5. Click **Update**.

Removing themes

Use **Remove Themes** to delete a customized theme from Infor Learning Management. If the theme you want to delete is assigned to any courses, the default Infor Learning Management theme will be applied to these courses in its place.

To remove a theme:

1. Select **Courses > Hierarchy System Level > Manage Learner Themes > Remove Themes**.
2. Select the check box for the theme.
3. Click **Delete**.

Working with event information

Use **Master Calendar View** to view a calendar view of all scheduled events at the selected level and its sub-levels.

To work with event information:

1 Select **Courses > Hierarchy Level > View Master Schedules > Master Calendar View**.
2 Select an event from the calendar to view detailed information. The **Session Event** window is displayed.
3 To print the information, click **Print**.
4 To export the information to a Word document, click Export to Word.
5 Click **Close** to exit the **Session Event** window.

Working with event information for a curriculum

Use **Calendar View by Curriculum** to see a calendar format view of course events for selected curricula within a selected level and its sub-levels. You may want to see only events for a specific curriculum and not all Infor Learning Management events.

To work with event information for a curriculum:

1 Select **Courses > Hierarchy Level > View Master Schedules > Calendar View by Curriculum**.
2 Select a curriculum.
3 To print the information, click **Print**.
4 To export the information to a Word document, click Export to Word.
5 Click **Close** to exit the **Session Event** window.

Working with master list view

Use **Master List View** to see a list view with details about scheduled events at the selected level and its sub-levels.

To work with master list view:

1 Select **Courses > Hierarchy Level > View Master Schedules > Master Calendar View**.
2 Specify a date range in which to search for events.
3 Click **Submit** to begin the search.
4 To export the search results to an Excel spreadsheet, click Export to Excel.

Using list view by curriculum

Use **List View by Curriculum** to see a list of details about scheduled events for selected curricula at the selected level and its sub-levels. You may want to see only events for a specific curriculum and not all Infor Learning Management events.

To use list view by curriculum:

1. Select **Courses > Hierarchy Level > View Master Schedules > List View by Curriculum**.
2. Select a curriculum and view the information.
3. To export the list as spreadsheet, click <u>Export to Excel</u>.

Adding a Continuing Education Credit provider

1. Select **Courses > Hierarchy Level > Manage Continuing Education Credit Providers > Add New Continuing Education Provider**.
2. Specify **Title**, **IMS Unique ID**, **Description**, and **Active** status.
3. Click **Save.**

Viewing and editing Continuing Education Credit Provider settings

1. Select **Courses > Hierarchy Level > Manage Continuing Education Credit Providers**.
2. Select the **Continuing Education Credit Provider** you wish to view or edit from the list.
3. To change the displayed information, click **Edit Continuing Education Provider**.
4. Specify: **Title**, **IMS Unique ID**, **Description**, and **Active** status.
5. Click **Save.**

Managing Continuing Education Credit Course Assignments

1. Select **Courses > Hierarchy Level > Manage Continuing Education Credit Providers**.
2. Select the **Continuing Education Credit Provider** you wish to edit from the list.
3. Click **Manage Continuing Education Credit Course Assignments**.

4 Specify**Credits**, Validity Period (enter date range or check **Always Available**), whether the credit value can be changed by administrators after the user completes the course, and **Course expiration**.

5 To assign a course to this Continuing Education Credit Provider, select the course from the list under **Available Courses** and click **Assign**.

6 To remove a course from this Continuing Education Credit Provider, select the course from the list under **Existing Courses** and click **Remove**.

   Note: Removing a course from the Continuing Education Credit Provider assignment does not remove the credits the users have already earned prior to removal.

Updating Course Continuing Education Credit Settings

Use this section to update Continuing Education Credit Settings for previously assignment courses.

1. Select **Courses > Hierarchy Level > Manage Continuing Education Credit Providers**.
2. Select the **Continuing Education Credit Provider** you wish to edit from the list.
3. Click **Update Course Continuing Education Credit Settings**.
4. Specify **Credits**, Validity Period (enter date range or check **Always Available**), whether the credit value can be changed by administrators after the user completes the course, **Course expiration**.
5. Select the course(s) for which you wish to update the settings and click **Update**.

Assigning Distribution Groups

1. To assign a distribution group, select the group from the **Available Distribution Groups** list and click **Assign.**
2. To remove an assigned distribution group, select the group from the **Assigned Distribution Groups** list and click **Remove**.

Recalculating and removing Continuing Education credits

You may need to recalculate or remove Continuing Education credits if those credits were not assigned correctly or the configuration has changed after the credits have been assigned.

To recalculate or remove Continuing Education credits:

1. Select **Courses > Hierarchy Level > Manage Continuing Education Credit Providers**.
2. Select the **Continuing Education Credit Provider** you wish to edit from the list.

3 Click **Recalculate and Remove Continuing Education credits**.
4 Select **Action** and select actions:
   - **Recalculate Credits** - select this option to recalculate the Continuing Education credits.
   - **Remove Credits** - select this option to remove the Continuing Education Credit. If needed, select **Include courses that are no associated with Continuing Education credit provider**.
5 Select **Users** and select user options:
   - **Recalculate Credits** - select this option to recalculate the Continuing Education credits.
   - **Remove Credits** - select this option to remove the Continuing Education Credit. If needed, select **Include courses that are no associated with Continuing Education credit provider**.
   - **All users in the current level** - Select this option to select all users in the current level.
   - **Users in the current level with their most reContinuing Educationnt course completetion between...** - select this option to only select uses whose course completion date falls between the dates you specify.
6 Select **Courses** and select course options:
   - **All courses** - select this option to select all courses associated with this Continuing Education credit.
   - **Select courses** - select this option to only select the specific courses associated with this Continuing Education credit.
7 Click **Apply.**

Manage Notification Templates

Administrators can create a notification profile that is specific to one or more courses that can be sent instead of the standard notification profile.

Adding a new notification template

1 Select **Courses > Manage Notification Templates > Add New Notification Template**.
2 Specify **Notification Template Name**.
3 Select the **Notification Profile** (Default, System, or Disabled) for all notification types. You can preview the system profiles by clicking the **Preview** button.
4 Click **Save**.

Editing notification templates

1 Select **Courses > Manage Notification Templates**.
2 Select the template to edit.

3 Click Edit Notification Template.

Removing notification templates

1. Select **Courses > Manage Notification Templates**.
2. You can either click **X** on the template row or click **Edit** and then click Remove Notification Template.
3. Click **OK** if you are removing the template from the template list screen, or **Remove** if you are removing the template from the individual template screen.

Managing courses

1. Select **Courses > Manage Notification Templates**.
2. Select the template to manage its courses.
3. Click Manage Courses.
4. To assign a new course, select the course and click **Assign**.
5. To remove an assigned course, select the course and click **Remove**.

Managing levels

1. Select **Courses > Manage Notification Templates**.
2. Select the template to manage its levels.
3. Click Manage Levels.
4. Select the levels in which this template will be available.
5. Click **OK**.

Custom Profiles

1. Select **Courses > Manage Notification Templates**.
2. Select the template to manage its custom profiles and click **Edit**.
3. Click Custom Profiles.
4. To add a new custom profile, click **Add**.
   a. Modify custom profile details.
   b. Click **Save.**
5. To modify an existing profile, click **Edit**.
   a. Modify custom profile details.
   b. Click **Save.**

6 To remove a custom profile, click **Delete**.

Manage Completion Documents

Administrators can create and customize the course completion documents that are made available to learners upon completing courses. Completion documents are assigned to existing courses and the same document can be assigned to multiple courses.

Adding a new completion document

1. Select **Courses > Manage Completion Documents > + (Add New Completion Document)**.
2. Specify completion document **Name** and description.
3. Select **Use default document** if you want to use the default system document.
4. Clear the **Use default document** check box if you want to use a custom completion document and select the document .zip file to upload from your computer.

   Note: You can download and customize the default completion document by clicking the **Download Default Completion Document** icon. Basic HTML knowledge is required to edit the file.
5. Click **Add**

Managing assigned courses

1. Select **Courses > Manage Completion Documents**.
2. Locate and select the completion document from the list or use the filter options to search for the document by name.
3. Click **Manage Courses**.
4. To assign new courses:
   a. Select the courses you wish to assign to the completion document from the **Available Courses** list.
   b. Click **Add**.
5. To remove assigned courses:
   a. Select the courses you wish to remove from the completion document from the **Assigned Courses** list.
   b. Click **Remove**.

Editing completion documents

1. Select **Courses > Manage Completion Documents**.
2. Locate the completion document in the list or use the filter options to search for the document by name.
3. Click the **Edit** icon for the completion document that you wish to edit.
4. Make the changes to the name, description, and completion document file.
5. Click **Save**

Deleting completion documents

1. Select **Courses > Manage Completion Documents**.
2. Locate the completion document in the list or use the filter options to search for the document by name.
3. Click the **Delete** icon for each completion document that you wish to delete.
4. Click **OK** to confirm.

Viewing course information

Use the **View Course information** page to view information about a course such as the Course Name, Course Short Name, Course ID, Course Description, Objectives, Audience, Automatic Waitlist Removal setting, Course Credit, Online URL, Launch URL, Active or Inactive status, Default Status, Codepage, Custom Fields (if applicable), Authoring Info including server and publishing details, and Curriculum Name information.

Note that the timestamp in the Date Created field is displayed in GMT and is not offset of the local time zone.

To view course information:

1. Select **Courses > Hierarchy Level > Course Name > More Options >** View Course.
2. View the information.

Editing course information

Use the **Edit Course Information** page to edit various course properties. For example, when you first publish a course using Infor Learning Management Content Creator, the course is marked as inactive. Courses must be marked as active in order for the course to be viewable by users. Use this option to edit course properties, such as marking a course as active. Note that the timestamp in the Date Created field is displayed in GMT and is not offset of the local time zone.

You can also enable exclusive editing, which will limit the authoring of the course to the selected level. This is only available when the Authoring field is set to None or Publish. For Publish/Retrieve authoring, exclusive editing is automatically set by the system. For Infor Learning Management courses, this setting indicates the level in which the course can be edited using Infor Learning Management Content Creator. This setting can be left blank for classroom and third-party online courses. This option is unavailable at the system level.

When the Course Change notification is turned on in System Notifications, a Send Change Notification option will be available at the top of the **Edit Course** page. After you select the **Send Change Notification** option, a **Change Description** window is displayed where you can specify text that explains the change in the course. The change description text is included in the body of the e-mail notification sent to users registered for the course. The notification will be sent after **Apply** is clicked.

When the authoring settings you select will make the course available to other levels, any Level 2-specific items in that course are moved up to the System level. Proceed with caution.

There are a variety of themes that can be applied to an Infor Learning Management course. In addition, you can upload and customize additional themes in Infor Learning Management. Applying a theme to a an Infor Learning Management course will alter its Infor Learning Management Learner interface appearance. For more information on adding themes, see the Add Theme topic.

To edit course information:

1. Select **Courses > Hierarchy Level > Course nameMore Options >** Edit Course.
2. Specify a Course Name, Course Short Name, Course Description, Course Objectives, Audience, and Course Credit.
3. To set the course as active or inactive, select or clear the **Active** check box.
4. To enable or disable whether the course will appear in the mobile version of the Infor Learning Management Portal, select or clear the **Mobile** check box.
5. To enable or disable whether or not users from the course registration waitlist will be automatically removed and placed into the course when seats become available, select or clear the **Automatic Waitlist Removal** check box.
6. To change the language set codepage, select the desired codepage from the **Codepage** item list.
7. To change the theme applied to the course interface, select the new interface theme from the **Theme** item list.
8. Specify the URL of the course if it has been created by a third-party, in the Online URL field.
9. To change the standard used to launch the course if it has been created by a third-party, select the new standard from the **Content Integration** item list.
10. To enable Infor Learning Management integration of a third-party course, select **Saba AICC 2.0** from the **ILM Integration** item list.
11. Select the **Exclusive Editing** check box to limit the authoring of the course to the selected level.
12. To add a custom prerequisite to the course or to change the one that is currently associated with it, select the name of the prerequisite from the **Custom Prerequisite Name** item list. The URL and parameters for the custom prerequisite are displayed.
13. Select any additional options that may be available if custom fields have been added.
14. Click **Apply**.

Managing levels

Use the **Manage Levels** page to add or remove courses and events from one or more levels. This option lets you manage course/event distribution on different levels throughout Infor Learning Management.

To manage levels:

1. Select **Courses > Hierarchy Level > Course Name > More Options > Manage Levels**.
2. From the **Event** item list, select the event to be added to the levels. Select **None** to distribute the course to levels without including any events.
3. To add a course or event to a level, select the check boxes next to the desired levels in the Hierarchy that you want to distribute it to. The level will display the number of course events that have been added.
4. To remove a course or event from a level, clear the check box.
5. You can also choose from these options from the Selected Level:
   - To add the course and event to all child levels below your selected level, click **Add Course to All Levels Below Selected Level**.
   - To remove the course and event from all child levels below your selected level, click **Remove Course from All Levels Below Selected Level**.
6. Click **Apply**.

Editing third-party online course package properties

Use **Package Properties** to edit various properties of the SCORM course package and preview those effects on the course player.

Use **Retake Management** to set up the number of times a learner can take an online SCORM or AICC course.

Note: Retake Management cannot be applied to online courses that have a fixed number of package attempts and TinCan (xAPI) courses.

Managing course retake

Any course retake changes apply only to future course attempts by the learners. Current course scores and attempts are not affected.

1. Select **Courses > Hierarchy Level > Course Name > More Options >** Edit Third-Party Online Course Package Properties **> Retake Management**.
2. Specify this information:

   Number of Attempts
   Select the number of times the learner can retake the course.

Attempt Grading
Select Average Attempt if you want the final score to be the average of all scores achieved by the learner.
Select Highest Attempt if you want the final score to be the highest achieved score from all learner attempts.
Select First Successful Attempt if you want the learner to be able to retake the course until a passing score is achieved. Once the passing score is achieved, the user can no longer retake the course.

Attempt State
This field is available when the number of attempts is not set to Unlimited and the Attempt Grading is set to First Successful Attempt.
Select **Lock After Final Attempt** if you want the learner to be unable to access the course after the final attempt.
Select **Review Only After Final Attempt**if you want the learner to be able to access the course after either the passing score or the maximum number of attempts is achieved.
Note: Any scoring after the final attempt is not recorded by the system and does not affect the score the user has already achieved.

3. Click **Save**.

Editing SCORM package properties

1. Select **Courses > Hierarchy Level > Course Name > More Options >** Edit Third-Party Online Course Package Properties **> Package Properties**.
2. View the SCORM standard used by this package in the Standard field.
3. View the URL designating where the course files are stored in the Manifest URL field.
4. View the URL designating the location of the imported SCORM package in the File field.
5. Click Preview to preview the course in the SCORM player.
6. To make changes to the SCORM package settings, use the options in the lower part of the screen. Settings are sorted by a navigation menu. To view additional information, click info.
7. To view information for each specific setting, move the pointer over the option and a tooltip is displayed.
8. Click **Save**.

Viewing levels

Use **View Levels** to see the levels in which a particular course is currently located.

To view levels:

1. Select **Courses > Hierarchy Level > Course Name > More Options >** View Levels.
2. To view the distribution of course events through a level, click the level name.

3 To view additional event information such as Course Details, Event Details, and e- Meeting details, if applicable, click the event name. The **View Information** window is displayed.

Creating course copies

A course created with Infor Learning Management Content Creator can be copied and those copies can be translated and localized. This six-step wizard simplifies the creation and distribution of copies to business units, or levels, and specific authors for localization.

To create course copies:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options > Manage Copies and Translations**.
2. To create a copy of the event for each course copy, select the **Add Events** check box.
3. Click Create Copies Wizard.
4. Complete **Create Copies Wizard Step 1 of 6**. In this step you determine how many copies of a selected course will be created and where they will be placed.
   a. To create course copies for translation, select the **Course copies will be translated** check box.
   b. Select the check box for each level in your Hierarchy where you would like to create a copy of the course. You may also click **Select All** to select all the listed levels, or click **Invert Selection** to reverse your current selections.
   c. For each selected level, specify a value in the Number of Copies field.
   d. Click **Next**.
5. Complete **Create Copies Wizard Step 2 of 6**.
   a. Select **Copy** or **Share** from the **Course Specific and Shared** item lists for each option.

      Copied items will be replicated so that the copies can be modified as needed independent of the original item.

      Shared items will be shared with original course and any modifications made to them will be reflected in the original course and all of its copies.
   b. Specify the following information:

      Append the following text to each copied item
      Specify text that will be added to the item name, so you may identify it as a copy.
   c. Click **Next**.
6. Complete **Create Copies Wizard Step 3 of 6**.
   a. Select a language from the **Locale** item list.
   b. Specify the title of each copy of the course the Course Title field.
   c. Select a custom field value for each course from the **Custom Field Value** item list.
   d. To lock a course copy for translation, select the **Lock Course and Generate Translation File** check box.
   e. Click **Next**.

7. Complete **Create Copies Wizard Step 4 of 6**.
   a. Select the check box for the users you want to assign as a course author for each copy of the selected course.
   b. Click **Next**.
8. Complete **Create Copies Wizard Step 5 of 6**.
   a. To make any alterations to your Copy Options or Course Copies, click Edit.
   b. Click **Finish**.
9. Complete **Create Copies Wizard Step 6 of 6**.
   a. Click **Close** to return to the **Manage Copies and Translation** page.

Generating a translation file

After you create a copy of a course, generate a translation file for the course. The downloaded translation file is a ZIP file labeled with a unique alphanumeric code. Do not change the name of or modify the folder structure of this ZIP file.

To generate a translation file:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options > Manage Copies and Translations >** Export for Translation. A confirmation message is displayed. If you choose the master course, then all existing copies are displayed on this screen.
2. Click **OK** to generate a translation file, or click **Cancel** to return to the **Manage Copies and Translation** page.
3. To create a translation packages for each listed copy click Export for Translation.
4. Click Download to save file.

Downloading a translation file

After you have generated a translation file, download the file.

To download a translation file:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options > Manage Copies and Translations**.
2. Click Download Translation File.

Merging translated content

After you have a generated and downloaded a translation file, merge translated content that has gone through the translation process with a third-party translation tool, such as Trados 2009/2011. After each translation file is successfully merged, the QA process can begin online through Infor Learning Management Learner. The course is displayed under the **Administrative Courses** tab.

To merge translated content:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options > Manage Copies and Translations**.
2. Select Merge Translated Content. If a master course was selected, all existing copies are displayed.
   a. Click Merge Translated Content for the copy. A Merge Translated Content screen is displayed for that copy.
3. Click **Browse** to locate the file.
4. Select the file and click **Open**.
5. Click **Upload**. The merge process begins. After the process is complete, a confirmation massage is displayed.

Viewing translation history

Throughout the translation and review process, there may be many versions of translation files merged into a course. Every time a translation file is merged with a course, that translation file is stored in an Infor Learning Management history folder. Use this process to access those files.

To view translation history:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options > Manage Copies and Translations >** View History.
2. To download the translation file, click on its filename.

Marking translation as complete

A course translation that has an exported translation file will not be retrievable in Infor Learning Management Content Creator or editable in Online Editor on page 420 until the translation process is marked as complete. You can still continue to merge translation files for the same course until it is marked complete.

After the translation is marked as complete, Merge Translated Content, Download Translation File, and Mark Translation File are disabled. Export Translation and View History are enabled.

To mark a translation as complete:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options > Manage Copies and Translations**.
2. Click Mark Translation Complete. If a master course was selected, all existing copies are displayed.
   a. Click Mark Translation Complete for the copy. A confirmation message is displayed.
3. Click **OK**. The times at which the course was marked complete and the names of the administrators that marked the course complete are displayed on a history tracking screen.
4. Click **Close**.

Restoring course content

After working with course copies and translations, you may wish to restore master course content for a copy. Use Restore Master Course Content to restore the text content of the copied course to its original state from the master course. The course copy retains all of its repository assets, such as images, media and document files.

This is a maintenance feature and is provided to fix course content in case of unexpected issues. This should be executed after careful consideration and might be dangerous if the copy has been localized already.

To restore course content:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options > Manage Copies and Translations**.
2. Click Restore Master Course.

Adding online portion content

To create a blended learning event, administrators can associate existing Infor Learning Management courses with courses from third-party vendors through Add Online Portion Content in Infor Learning Management.

Use Add Online Portion Content instead of Import Course if you are combining an Infor Learning Management and third-party course into one learning event. Using Add Online Portion Content associates the third-party course with an existing Infor Learning Management course.

Upon upload from a .zip file or a URL, the file will be opened and the files will be stored on the server in the Repository\Online\SCORM directory with the name of the zip file. After import completion, the inactive course is added to Infor Learning Management and an event is created with these properties:

- Event Name: Name of the Course with “Event” at the end
- Registration: Always Available
- Self Cancellation: Always Available
- Online Portion: Always Available

- Self-Registration: Available in the Level 2 where course was imported

To add online portion content:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Add Online Portion Content.
2. To import one or more SCORM or AICC courses from a .zip file, in the Import from an uploaded .zip file section:
   a. Click **Browse file** to locate and select the zip file with the third-party course.
   b. Click **Import Course(s)** to complete the import process.
3. To import a single SCORM course from a URL, in the Import single course from URL section, specify this information and click **Import Course(s)**:

   Manifest URL
   Specify the full URL including the file name and file type extension.

4. Click **OK** on the name change confirmation window.
5. If the imported course is in SCORM1.2 format, click **OK** on the passing score confirmation window.
6. Click **OK** on the import completion window.
7. Review the information on your imported course.

Removing online portion content

Use Remove Online Link to update the contents of the third-party course or remove its association to an Infor Learning Management course.

To remove online portion content:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Remove Online Portion Content.
2. If the Infor Learning Management course does not have a valid online course associated, an Invalid Standard ID error message is displayed.
3. Details of the course are displayed. To associate new third-party content, delete the following information:
   - Total Sessions By Users
   - Total Topics in the Course
4. Click **Delete** to remove the association.

Managing course comments

Users can post comments for any page within a course via Infor Learning Management Learner. Use Manage Course Comments in Infor Learning Management Administrator to view all comments posted by users to a course. With this option, administrators can sort, view, and update course comments posted by users.

To manage course comments:

1 Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Manage Course Comments.
2 Make selections from these item lists:
   a Select the published course version that a comment was added to from the **Version** item list.
   b Select a comment status option from the **Status** item list to search all comments or only new ones.
   c Select an option that comments are related to from the **Related to** item list.
   d Select a date range from the **Posted within** item list.
   e Select a course comment sort option from the **Sort By** item list. Comments are sorted in ascending order by default. To change this, select the **Check here to sort comments by descending order** check box.
3 Click **Search Comments**.
4 To delete a comment, select its check box and click **Delete**.
5 To update the comment status, select an option from the **Status** item list.
6 To categorize the comment, select a category from the **Related to** item list.
7 To determine who the comment is directed to, select an option from the **Directed To** item list.
8 To export the search results as a spreadsheet, click Export to Excel.
9 Click **Update**.

   You can customize the **Status** and**Related to** item lists with Manage Comment Categories on page 311 within the Configuration Settings option group of the System Category.

Adding evaluations and surveys

After creating an evaluation set, you can add the evaluation to any course using Add Evaluations and Surveys.

After an evaluation is added to a course, it should be added on the Live Server rather than the Edit Server. Any evaluation created on the Edit Server when a course is already published to the Liver Server will not be carried over.

To add evaluations and surveys:

1 Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Add Evaluations and Surveys.
2 Select the check box for the evaluation or survey.
3 Click **Add**.

Managing evaluations and surveys

After adding an evaluation or survey set to a course, administrators can use Manage Evaluations and Surveys to change the order in which multiple evaluations are displayed to the user or to remove an evaluation.

To manage evaluations and surveys:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Manage Evaluations and Surveys.
2. To change the order of the evaluation set, specify a number into its field.
3. To remove an evaluation set, select the checkbox and click **Remove**.
4. To save and apply ordering changes, click **Update**.

   When you add a custom evaluation to a course, the system places the Default Evaluation first with the newly added evaluation second. If, after reordering the evaluations, you have two evaluations in the same place, the system places a red arrow beside the second course, drawing your attention to the incorrect ordering. When you remove an evaluation, the system automatically reorders the remaining evaluations.

Viewing prerequisites

Use View Prerequisites to view required prerequisite courses that need to be completed before a user may register for the selected course.

To view prerequisites:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options >** View Prerequisites.
2. View the prerequisites. If there are none, No Prerequisites is displayed.

Adding prerequisites

Use Add Prerequisites to assign prerequisites to a course. If you want users to take a specific course before taking another course, designate that course as a prerequisite. Prerequisite options can be configured on a course-by-course basis. Prerequisite courses can be assigned only one level deep. Courses cannot be prerequisites of each other. A course containing a prerequisite will not be available to the user until the Prerequisite Satisfied By criteria has been achieved.

To add prerequisites:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Add Prerequisites.
2. Select the check box next to each course that you would like to be a prerequisite for the selected course.

3 Select the criteria by which the user will fulfill the prerequisite from the **Prerequisite Satisfied By** item list. Select either **Completion** or **Completion or Enrollment**.

- If you select **Completion**, the other courses to which the prerequisite course has been assigned become available for self-registration once a user successfully completes the prerequisite course. Completion of the prerequisite is achieved by passing the post-assessment in an Infor Learning Management course, successfully completing a third-party course, or being assigned event credit through Infor Learning Management Administrator.
- If you select **Completion or Enrollment**, enrollment in the prerequisite course counts as fulfillment of the prerequisite requirement in addition to satisfying the prerequisite requirement using the above Completion criteria.

4 Click **Add**.

Editing prerequisites

Use Edit Prerequisites to edit prerequisite criteria for a course.

To edit prerequisites:

1 Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Edit Prerequisites.

2 Select the criteria by which the user will fulfill the prerequisite from the **Prerequisite Satisfied By** item list. Select either **Completion** or **Completion or Enrollment**.

- If you select **Completion**, the other courses to which the prerequisite course has been assigned become available for self-registration once a user successfully completes the prerequisite course. Completion of the prerequisite is achieved by passing the post-assessment in an Infor Learning Management course, successfully completing a third-party course, or being assigned event credit through Infor Learning Management Administrator.
- If you select **Completion or Enrollment**, enrollment in the prerequisite course counts as fulfillment of the prerequisite requirement in addition to satisfying the prerequisite requirement using the above Completion criteria.

3 Click **Update**.

Removing prerequisites

Use Remove Prerequisites to remove a prerequisite from a selected course.

To remove prerequisites:

1 Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Remove Prerequisites.

2 Select the check box of the prerequisite course that you would like to remove.

3 Click **Remove**.

Viewing notifications

After an administrator creates a notification to be sent to course users, use View Notifications to view the contents and sending details for the message. Information about the notification includes Level Users, Subject, Message, whether the message is an HTML Message, Date the Message Sent, Email Address of Sender, and Carbon Copy Email Address and Name. This information is available before a message is sent.

To view notifications:

1 Select **Courses > Hierarchy Level 2 > Course Name > More Options >** View Notifications.
2 Select a notification from the item list.

Adding notifications

Use Add Notification to create notifications and send them to course users.

To add a notification:

1 Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Add Notification.
2 Specify a subject for the message.
3 Click the **Text** or **HTML** radio button to determine the message format. If the **HTML** radio button is selected, then you can use Microsoft Word like features to format your notifications.
4 Specify your message, the send date and time, sender e-mail and name, and e-mails and names for those you would like to copy.
5 Click **Add**.

Editing notifications

Use Edit Notifications to edit a notification. You can edit a notification only if it has not yet been sent.

To edit notifications:

1 Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Edit Notifications.
2 Select a notification from the item list.
3 Edit the notification.
4 Click **Update**.

Removing Notifications

Use Remove Notifications to remove notifications for a course. You can only remove a notification that has not yet been sent.

Caution: Once you delete a notification you cannot restore it.

To remove a notification:

1 Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Remove Notifications.

2 Click **Delete Notification**.

Using chargeback

Use Chargeback to assign a chargeback to a course. A chargeback method identifies the method for which you calculate course costs. You can assign a chargeback to a course either by user or by hour and then associate a cost with either method.

To use chargeback:

1 Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Chargeback.

2 Select the method for charging for taking the course.

3 Specify an amount in the Charge field and select a currency type.

   To create a list of default currencies in Infor Learning Management Administrator, see Currency Options on page 302.

4 Click **Submit**.

Viewing assigned authors

Use View Assigned Authors to view a list of all authors assigned to the course.

To view assigned authors:

1 Select **Courses > Hierarchy Level 2 > Course Name > More Options >** View Assigned Authors.

2 View the information.

Adding course authors

Use Add Course Authors to enable an author to retrieve and edit an existing Infor Learning Management course.

To add course authors:

1 Select **Courses > Hierarchy Level > Course Name > More Options >** Add Course Authors.
2 Locate one or more authors or click **Show All** to display all authors.
3 Select the check box next to each author you wish to add to the course
4 Click **Add**.

Removing course authors

Use Remove Course Authors to remove editing rights for a course from an author.

To remove course authors:

1 Select **Courses > Hierarchy Level > Course Name > More Options >** Remove Course Authors.
2 Locate one or more authors or click **Show All** to display all authors.
3 Select the check box next to each author you wish to remove.
4 Click **Remove**.

Adjusting timed assessment settings

Use Timed Assessment Settings to view the details of the assessments associated with a course and to set a time duration in minutes for each assessment.

To adjust timed assessment settings:

1 Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Timed Assessment Settings.
2 To view the details of a listed assessment, click Details.
3 Specify the number of minutes that a user has to complete an assessment. To remove the time limit from an assessment and allow the user unlimited time to take it, specify a value of zero.
4 Click **Update** to save your changes or click **Reset** to return to the previously saved settings.

Creating an assignment

Use Assignment Template to create an assignment for the currently selected course.

To use an assignment template:

1 Select **Courses > Hierarchy Level 2 > Course Name > More Options >** Assignment Template.
2 Complete **Assignment Details**.

a. Specify the name of the assignment.
b. Select a grading scale.
c. Specify an assignment description.
d. Click **Next**.

3 Complete **Reading Materials**.

a. To add reading materials to the assignment, click **New file**.
b. Click **Browse** and select the file.
c. Click **Open**.
d. Specify a description.
e. Click **Save**.
f. To view the file, click the document name.
g. To disable the file, clear its check box.
h. To remove the file, click the delete icon.
i. Click **Next**.

4 Complete **To Do**.

a. To add the file containing the assignment, click **New File**.
b. Click **Browse** and select the file.
c. Click **Open**.
d. Specify a description.
e. Click **Save**.
f. To view the file, click the document name.
g. To disable the file, clear its check box.
h. To remove the file, click the delete icon.
i. Click **Next**.

5 Complete **Summary**.

a. Review your selections.
b. To make any changes, click **Back** or the relevant menu tab to return to the previous steps.
c. When you are satisfied with all of the information displayed on the **Summary** screen, click **Finish**.

Establishing course equivalency

Multiple courses can be configured to satisfy the same completion requirement. An automatic courses credit is granted to all directly equivalent courses, indirectly equivalent courses are not affected. For example, if a course A is equivalent to a course B, and a course B is equivalent to a course C, then the credit for completing course A is not granted for course C.

Course Equivalency for Prerequisites

Use Course Equivalency for Prerequisites to designate courses as equivalent to each other.

1. Select **Courses > Course Name > More Options > Course Equivalency**.
2. Select **Course Equivalency for Prerequisites** from the dropdown list.
3. To select whether to include courses, curricula, or both in the list of available courses/curricula, select or clear the **Courses** and **Curricula** check boxes.
4. Select the course(s) or curricula you wish to add.
5. Click **Add**.
6. To remove a course or curriculum from the selected course's equivalency list, select its check box and click **Remove**.

Course Equivalency for Completion

Use **Course Equivalency for Completion** to automatically satisfy the requirements and complete another associated (equivalent) course if the user completes the current course.

1. Select **Courses > Course Name > More Options > Course Equivalency**.
2. Select **Course Equivalency for Completion** from the dropdown list.
3. Select the course(s) you wish to add.
4. Click **Add**.
5. To remove a course from the selected course's equivalency list, select its check box and click **Remove**.

Managing Distribution Rules

1. Select **Courses > Course name > More Options > Manage Distribution Rules**.
2. Select **Distribution Process** options.
   a. Select **Keep existing users** to keep the existing users after the distribution process runs.
   b. Select **Events** to include the events in the distribution process.
3. To add a new distribution rule:
   a. Click **Add New Rule**.
   b. Specify a **Distribution Rule Name**.
   c. Select a user attribute from the item list and select values from any subsequent item lists.
   d. To add additional user attributes, click the **+** icon.
   e. To remove an attribute, click the **X** icon.
   f. Click **Save**.
4. To remove a distribution rule, click the **X** icon.

Viewing CE Credits

To view CE credits associated with a course, select **Courses > Hierarchy Level > Course Name > More Options >** View CE Credits..

Assigning Distribution Groups

1 To assign a distribution group, select the group from the **Available Distribution Groups** list and click **Assign.**
2 To remove an assigned distribution group, select the group from the **Assigned Distribution Groups** list and click **Remove**.

Using Tin Can Statement Viewer

The Tin Can/Experience API (or xAPI) is a unique specification for learning technology that makes it possible to collect data about the wide range of experiences a person has (online and offline). The API captures data in a consistent format about a person or group's activities from many technologies.

Administrators can use the Tin Can Statement Viewer to see specific information about user activities. Infor Learning Management has a built-in xAPI compliant Learning Record Store (LRS) so that it can support any external Activity Provider that is configured in ILM Administrator.

In order to collect learner data, administrators need to configure a learning activity provider (LAP). See Configuring Tin Can activity provider on page 307 for more information.

To access the Tin Can Statement Viewer, select **Courses > Hierarchy > Course Name > More Options >** Tin Can Statement Viewer.. You can filter the actions by specifying any of the values, such as action verbs or specific user's email address, or use advanced options to specify format and date range.

Selecting a notification template

1 Select **Courses > Hierarchy > Course Name > More Options >** Select Notification Template.
2 Select the notification template from the **Notification Template Name** list.
3 Click **Save**.

Viewing external tests

Use View External Tests to view the test's name, passing score, and assessment type after an administrator adds an external test to an event.

To view an external test:

1. Select **Courses > Hierarchy Level > Course Name > External Tests >** View External Tests.
2. Specify the desired date range for the event or select the check boxes to **See Events for all Dates** and/or archived events.
3. Click **Search**.
4. Select an event from the **Please select an event** item list.
5. Select a test from the **Please select a test** item list.

Adding an external test

Use Add External Test to add an external test to a course in Infor Learning Management.

To add an external test:

1. Select **Courses > Hierarchy Level > Course Name > External Tests >** Add External Test.
2. Specify the desired date range for the event or select the check boxes to **See Events for all Dates** and/or archived events.
3. Click **Search**.
4. Select an event from the **Please select an event** item list.
5. Specify a Test Name and Passing Score.
6. Choose **Normal**, **Pre-Assessment**, or **Post-Assessment** from the **Assessment** item list.
7. Click **Create** to complete the process or click **Reset** to undo your changes.

Editing external tests

To change the name, passing score, or assessment type of an Infor Learning Management external test, use Edit External Tests.

To edit an external test:

1. Select **Courses > Hierarchy Level > Course Name > External Tests >** Edit External Tests.
2. Specify the date range or select the **See Events for all Dates** check box.
3. Click **Search**.
4. Select an event from the **Please Select an Event:** item list.
5. Select a test from the **Please Select a Test:** item list.

6 Specify a Test Name and Passing Score.
7 Choose **Normal**, **Pre-Assessment**, or **Post-Assessment** from the **Assessment** item list.
8 Click **Update** to complete the process or click **Reset** to undo your changes.

Removing external tests

When you no longer want an external test associated with an event use the Remove External Tests option to delete it.

Caution: Once you delete an external test, you cannot restore it. Proceed with caution.

To remove an external test:

1 Select **Courses > Hierarchy Level > Course Name > External Tests >** Remove External Tests.
2 Specify the date range or select the **See Events for all Dates** check box.
3 Click **Search**.
4 Select an event from the **Please Select an Event:** item list.
5 Select a test from the **Please Select a Test:** item list.
6 Click **Remove**.

Editing external test scores

Use Edit External Test Scores to add or edit external test scores for users assigned to an event.

To review a user's external test history, click their name. A pop-up window is displayed with all previously recorded external test information including: score, passed (status Yes/No), date and date modified.

The Infor Learning Management Portal shows the most recent score in a user's transcript. To view transcript history in the Infor Learning Management Portal, click on the course name from the transcript.

To edit external test scores:

1 Select **Courses > Hierarchy Level > Course Name > External Tests >** Edit External Test Scores.
2 Specify the date range or select the **See Events for all Dates** check box.
3 Click **Search**.
4 Select an event from the **Please Select an Event:** item list.
5 Select a test from the **Please Select a Test:** item list.
6 Use the Search functions to locate users, or click **Show All**.
7 Select a user.
8 Specify a date completed and new score.
9 Click **Update** to complete the process, or click **Reset** to undo your changes.

Viewing assigned course users

Users can be assigned to a course in one of three ways:

- Users can self-register for courses.
- The course or curriculum can be assigned by default to all users on the level.
- Administrators can manually assign a user to a course/event.

Any course may have one or more events associated with it, and a user can be assigned to more than one event for the same course. When you use View Assigned Course Users, you can view a list of all users who are assigned to a course, regardless of events.

To view assigned course users:

1. Select **Courses > Hierarchy Level > Course Name > Users >** View Assigned Course Users.
2. Select to view **All Users** or **Users without Events** from the **Search** item list.
3. Use the Search functions to find users, or click **Show All** to display all users.

Enrolling users in courses/events

If a course or curriculum is not a default at a user's assigned level, you can manually add the user to a course or event.

A prerequisite check is performed. To overwrite a prerequisite requirement and add the users to the course/event, select the user check box and click **Add**.

Users denoted with eu are already assigned to the event in another level. You can assign them to the event at the current level as well. However, assigning them again in the current level will not impact the number of seats in use for this event. You are only adding the records of existing users. If you want to add a new user to the system, see Adding new users on page 34.

To enrol a user in a course/event:

1. Select **Courses > Hierarchy Level > Course Name > Users >** Enroll Users in Courses/Events.
2. Specify a date range or select the **check here to see all current and future events:** check box.
3. Select an event from the **Please Select an Event:** or select **--> Let user choose event <--**.
4. Search for the user or select **Show All**.
5. Select the user check box. Click **Select All** to select all users or click **Invert Selection** to reverse your existing selections.
6. Click **Add**.

Removing course users

Use Remove Course Users to manually remove users from a course.

To remove course users:

1 Select **Courses > Hierarchy Level > Course Name > Users >** Remove Course Users.
2 Select **All Users** or **Users without Events**.
3 Search for users or click **Show All** to display all users.

   Some users cannot be removed from courses when they are marked with the following symbols:

   - **CPU**—user enrolled in a course that is part of a certification program
   - **CU**—user enrolled in a course that is is part of a curricula

4 Select the user check box. Click **Select All** to select all users, or click **Invert Selection** to reverse your existing selections.
5 Click **Remove** to complete the process.

Viewing users enrolled in events

Use View Users Enrolled in Events to see a list of users who are enrolled in course events.

To view users enrolled in events:

1 Select **Courses > Hierarchy Level > Course Name > Users >** View Users Enrolled in Events.
2 Specify a date or select the **See Events for all Dates:** check box.
3 Search to find users, or select **Show All** to display all users.

Removing users from events

Use Remove Users from Events to remove users from an event if you do not wish to keep records of those users' enrollment in the event.

To remove a user from an event:

1 Select **Courses > Hierarchy Level > Course Name > Users >** Remove Users from Events.
2 Specify a date range or select the **See Events for all Dates:** check box.
3 Click **Search**.
4 Select an event from the item list.
5 Search for users or click **Show All**.
6 Select the check boxes for the users or click **Select All**. To reverse your existing selections, click **Select All**.
7 Click **Remove**.

Switching event users

The Switch Event Users option allows you to replace a user that is currently enrolled in an event with a user that is not or swap two users between events in which they are enrolled. This option only works with events that have a classroom portion.

To switch event users:

1. Select **Courses > Hierarchy Level > Course Name > Users >** Switch Event Users.
2. Specify a date range or select the **See Events for all Dates:** check box.
3. Click **Search**.
4. Select an event from the **Please Select an Event** item list.
5. Search to locate users or select **Show All**.
6. To replace a user registered for an event with another user:
    a. Click the **Switch With New Users** radio button.
    b. Select the radio button for the user to be replaced.
    c. Click **Next**.
    d. Search for a user or click **Show All**.
    e. Click the radio button for the user to be swapped with the registered user.
    f. Click **Swap**.
7. To switch two users between events for which they are registered:
    a. Click the **Switch User Between Events** radio button.
    b. Select the radio button for the user to be moved
    c. Click **Next**.
    d. Search for a user or click **Show All**.
    e. Click the radio button for the user to be swapped with the first user.
    f. Click **Swap**.

Viewing event waitlists

Use View Event Waitlists to view a list of waitlisted users for a selected classroom event. You can remove users from the waitlist, manually add users to the event from the waitlist or change the order in which waitlisted users are added to the event.

To view event waitlists:

1. Select **Courses > Hierarchy Level > Course Name > Users >** View Event Waitlists.
2. Specify a date range or select the **See Events for all Dates** check box.
3. Click **Search**.
4. Select an event from the **Please select an event** item list.
5. To remove a user from the event waitlist, select the user check box and click **Remove**.
6. To add a user to an event from the waitlist, select the user check box and click **Add To Event**.

7 To move a user to a higher or lower position on the waitlist, specify a numerical value in that user's **Move To** field and click **Submit**.

Viewing an event approval list

Use View Event Approval List to view a list of users who have requested approval for an event. If a user must acquire approval from a supervisor before registering for an event, they do so with the Infor Learning Management Portal. This action sends an e-mail to their supervisor who in turn approves or disapproves the request.

To view an event approval list:

1. Select **Courses > Hierarchy Level > Course Name > Users >** View Event Approval List.
2. Select an option from the **Show Requests** item list:

   All
   View all requests.

   Pending
   View users whose requests that have not yet been answered.

   Approved
   View users whose requests have been approved.

   Not Approved
   View users whose requests have not been approved.

   Added through Admin
   View users who have been added through Infor Learning Management Administrator.

   Cancelled by User
   View users who have cancelled their requests.

   Cancelled by Administrator
   View users whose requests have been cancelled by an administrator.

Viewing event attendance

Use View Event Attendance to view a list of users who have received credit for their attendance to a classroom event.

To view event attendance:

1. Select **Courses > Hierarchy Level > Course Name > Users >** View Event Attendance.
2. Specify the date range for the event or select the **See Events for all Dates** check box.

3 Click **Search**.
4 Select and event from the **Please Select an Event** item list.

Editing event attendance

Administrators use Edit Event Attendance to mark the physical attendance of a user to a classroom event. This functions like a course roster.

To edit event attendance:

1 Select **Courses > Hierarchy Level > Course Name > Users >** Edit Event Attendance.
2 Specify the desired date range for the event or select the **See Events for all Dates** check box.
3 Click **Search**.
4 Select an event from the **Please select an event** item list.
5 To remove a user from the attendance list, clear their check box.
6 To add a user to the attendance list, select their check box.
7 Click **Update** to complete the process.

Viewing course credit

Use View Course Credit to view the credits assigned to users of an online or classroom course. Course credit information becomes part of a user transcript. This option also shows whether Reconciliation is enabled or disabled. Reconciliation is way to mark that all credit has been completed for an event so that other business processes can begin.

Reconciliation Enabled means the **Reconciliation** check box is selected in Administer Course Credit. Reconciliation Disabled means that the **Reconciliation** check box is cleared.

To view course credit:

1 Select **Courses > Hierarchy Level > Course Name > Users >** View Course Credit.
2 Specify the desired date range or select the **See Events for all Dates** check box.
3 Click **Search**.
4 Select an event from the **Please select an event** item list.

Administering course credit

Use the **Administer Course Credit** option to manually assign or remove a course credit for a classroom course or an online course to a user. In addition to assigning or removing course credit, this feature also allows for administrators to know when the process of giving credit has been completed for an event and other processes for the event can begin, for example, reporting or billing.

To manually assign or remove a course credit for a user:

1 Select **Courses > Hierarchy Level > Course Name > Users > Administer Course Credit**.
2 Specify the date range for the event or select the **See Events for all Dates** check box.
3 Click **Search**.
4 Select the event in from the item list.
5 To give a user course credit:
    a Select the user's check box.

      You can click **Select All** to select all users, or click **Invert Selection** to reverse your current selection.
    b Specify the date and time that the credit was given.
6 To remove course credit from a user, clear the check box next to the user’s name.
7 To put a finalize the granting of credit for an event, select the **Reconciliation** check box. When **Reconciliation** is enabled, credit can no longer be given for an event and no changes can be made to the credit that has already been given.
8 Click **Update**.

Resetting course user data

An assessment score is recorded in Infor Learning Management when a user satisfies the course completion rules. Administrators can also record external test scores for users.

To allow users to retake a course, assessment module, or external test, you can reset their course data. This includes course scores, visited pages, and question pools, allowing users to retake courses and assessments with new question pools. While this information is reset, it is still retained in the users' historical score and event credit information. However, you have the option of permanently deleting this information as well. Using the **Reset Course User Data**option, you can reset this information for multiple users of a particular course.

Note: You should use this option to reset a single course's data for multiple users. To reset data for a particular user for single or multiple courses, use the **Reset Course Tracking Data** option. See Resetting user course tracking data on page 63.

To reset course data for users:

1 Select **Courses > Hierarchy Level > Course Name > Users > Reset Course User Data**
2 Use the search functions to locate one or more users or click **Show All** to display all users.

   Some courses or events cannot have its data reset when they are marked with the following symbols:
   - **CPU**—the user is enrolled in a course that is part of a certification program
3 Specify this information:

Reset Course
Select to reset the course scores, assessment answers, and visited pages for selected users.

Reset question pool
Select to reset the question pool for selected users.

Delete all course scores and history
Select to permanently remove all current and historical scores, event credits, external test scores, and question data for selected users.

Reset timer for assessment modules

4. Select each user for whom you want to reset or delete course data.
5. Click **Submit**.

Managing Enrollment/Cancellation Template Values

Use Manage Enrollment/Cancellation Template Values to manually edit the values submitted by users in response to enrollment or cancellation prompts. Values can be edited on a per-user basis or for all event users.

To manage enrollment/cancellation template values:

1. Select **Courses > Hierarchy Level > Course Name > Users > Manage Enrollment/Cancellation Template Values**.
2. To limit the results to scheduled events that occur between a specific date range, select the **Select the Date Range between** check box and specify the dates.
3. Select the desired event from the item list.
4. Select a tab to view and edit the template values:

   Enrolled
   Enrollment template values submitted during the enrollment process or edited afterwards are displayed.

   Waitlisted
   Enrollment template values are displayed, but only for users who have been waitlisted due to event enrollment restrictions.

   Cancelled
   Cancellation template values submitted by users during the process of cancelling their event enrollment are displayed.

5. To manually change a template value for all listed users, specify the template value in the field and click **Save**.

   Caution:

If there are multiple template values on the currently selected **Enrolled**, **Waitlisted**, or **Cancelled** tabs, you will see each listed separately in this area.

Make sure that you select the correct one when making this type of change as this process will overwrite the values for the selected template for all listed users.

6 To manually change a template value for a specific user:

a Search for the desired user.

b Specify the new text or selection.

c Click **Save**.

Caution:

You can change multiple values for different listed users prior to clicking Save as long as you do not reload the list of users.

Reloading the list by changing template tabs or using the search options will erase any unsaved changes.

Cancelling users from events

Use Cancel Users from Events to cancel users from events in which they are enrolled.

To cancel users from events:

1. Select **Courses > Hierarchy Level > Course Name > Users >** Cancel Users from Events.
2. Specify the desired date range for the event or select the **See Events for all Dates** check box.
3. Click **Search**.
4. Select an event from the **Please select an event** item list.
5. Search for the user or select **Show All** to view all users.
6. Select the check box for the user.
7. Click **Cancel User**.

Adding a new topic

Use Add New Topic to add a forum topic or view forum threads in Infor Learning Management Administrator. Forums provide both users and instructors another form of discussion through forum topics and posted threads. Users can create new forum topics with Infor Learning Management Learner.

To add a new topic:

1. Select **Courses > Hierarchy Level > Course Name > Forums > Add New Topic**.
2. Specify a topic name and click **Add**.

Managing topics

Use Manage Topics to view topics and threads posted to a course, as well as rename or delete topics.

To manage topics:

1. Select **Courses > Hierarchy Level > Course Name > Forums > Manage Topics**.
2. Select an option from the **Show topics posted within** item list.
3. To view a topic and the threads within it, click its name.
4. To change a topic name:
   a. Click **Update**.
   b. Specify a new name.
   c. Click **Update**.
   d. Click **Back to Topics**.
5. To delete a topic, click **Delete** and then click **OK** on the confirmation dialog box.

Reports

Many reports, broken down by course, detailing activities in the system, are available in Infor Learning Management.

The following table shows reporting options available in the **Courses** category.

Standard Reports	
Report	**Description**
Scores - By Module on page 257	An overview of assessment scores by module for a selected course.
Scores - By Question on page 257	An overview of assessment scores by question for a selected course.
Scores - Percentages on page 259	An overview of users who scored below or above a specified post-assessment score for a selected course.
Scores - Passing Scores on page 259	An overview of users who have passed a post-assessment for a selected course.
Scores - Knowledge Gap on page 259	An overview of a user's Pre- and Post-Assessment scores for a course.
Scores - External Scores on page 258	An overview of external assessment scores.
Scores - By User on page 258	An overview of assessment module scores for a selected course.

Standard Reports	
Report	**Description**
Sessions - User on page 260	View total sessions and total online time for a course by user.
Sessions - Started for Period on page 260	An overview of course sessions begun but not completed.
Sessions - Not Started for Period on page 260	An overview of course sessions which have not been started for a given time period.
Sessions - Overview on page 260	View total sessions and total online time for a course.
Evaluations - Level 1 on page 254	A summary of Level 1 evaluations for a selected course.
Evaluations - Level 2 on page 254	A summary of Level 2 evaluations for a selected course.
Survey - By User on page 261	An overview of survey responses by user for a selected course.
Event - Enrollment Sheet on page 256	A list of registered users for an event in a selected course.
Survey - Stats on page 261	An overview of survey statistics for a selected course.
Survey - Essay on page 261	An overview of evaluation essay responses for a selected course.
Event - Cancelled Enrollment on page 255	A list of users who have canceled their enrollment in a selected course event.
Event - Credit on page 256	An overview of users who have been granted event credit in a selected course.
Event - Cost on page 255	An overview of costs associated with an event in a selected course.
Event - Waitlist on page 257	An overview of waitlisted users for an event in a selected course.
Event - Enrollment/Attendance on page 256	An overview of user enrollment in an event vs. attendance for a selected course.
Course/Event - Cancelled Users on page 254	An overview of canceled enrollment in a selected course and for events within the selected course.
Assign Chargeback on page 253	A summary of chargeback costs for a selected course.

Dynamic Reports	
Report	**Description**
Survey - By Course on page 286	An overview of all the answers given to survey questions by end users.
Online User Sessions - By Course on page 284	A summary of online user sessions for a selected course.
External Assessment Scores - By Course on page 272	View external assessment scores for a selected course.
Enrollment - By Course on page 267	View records of user enrollment for a selected course.
Score Summary - By Course on page 274	A summary of all user assessment scores for a selected course.
Course Scores - By Course on page 270	View course scores by course
Course Scores - Overview on page 271	An overview of scoring history for a selected course.
ILM Assessment Scores - By Course on page 276	View records of ILM assessment scores for a selected course.
ILM Pre vs Post Assessment - By Course on page 279	View a comparison of a user's pre-assessment and post assessment scores for a selected course.
ILM Question Scores - By Course on page 279	View ILM question scores for a selected course.

Administering course credit

Use the **Administer Course Credit** option to manually assign or remove a course credit for a classroom course or an online course to a user. In addition to assigning or removing course credit, this feature also allows for administrators to know when the process of giving credit has been completed for an event and other processes for the event can begin, for example, reporting or billing.

To manually assign or remove a course credit for a user:

1. Select **Courses > Hierarchy Level > Course Name > Users > Administer Course Credit**.
2. Specify the date range for the event or select the **See Events for all Dates** check box.
3. Click **Search**.
4. Select the event in from the item list.
5. To give a user course credit:
   a. Select the user's check box.

You can click **Select All** to select all users, or click **Invert Selection** to reverse your current selection.

b Specify the date and time that the credit was given.

6. To remove course credit from a user, clear the check box next to the user's name.
7. To put a finalize the granting of credit for an event, select the **Reconciliation** check box. When **Reconciliation** is enabled, credit can no longer be given for an event and no changes can be made to the credit that has already been given.
8. Click **Update**.

Resetting course user data

An assessment score is recorded in Infor Learning Management when a user satisfies the course completion rules. Administrators can also record external test scores for users.

To allow users to retake a course, assessment module, or external test, you can reset their course data. This includes course scores, visited pages, and question pools, allowing users to retake courses and assessments with new question pools. While this information is reset, it is still retained in the users' historical score and event credit information. However, you have the option of permanently deleting this information as well. Using the **Reset Course User Data**option, you can reset this information for multiple users of a particular course.

Note: You should use this option to reset a single course's data for multiple users. To reset data for a particular user for single or multiple courses, use the **Reset Course Tracking Data** option. See Resetting user course tracking data on page 63.

To reset course data for users:

1. Select **Courses > Hierarchy Level > Course Name > Users > Reset Course User Data**
2. Use the search functions to locate one or more users or click **Show All** to display all users.

   Some courses or events cannot have its data reset when they are marked with the following symbols:

   - **CPU**—the user is enrolled in a course that is part of a certification program
3. Specify this information:

   Reset Course
   Select to reset the course scores, assessment answers, and visited pages for selected users.

   Reset question pool
   Select to reset the question pool for selected users.

   Delete all course scores and history
   Select to permanently remove all current and historical scores, event credits, external test scores, and question data for selected users.

   Reset timer for assessment modules
4. Select each user for whom you want to reset or delete course data.

5 Click **Submit**.

Course marketplace

The Course Marketplace (purchased separately) is powered by OpenSesame and provides access to a catalog of e-learning courses. Purchased courses are automatically imported to Infor Learning Management. Contact your Customer Service Manager for information regarding obtaining access to the Course Marketplace.

Curricula

A list of all curricula in levels that are assigned to the logged in Administrator is displayed by default when the **Curricula** category is selected. To limit the courses to a specific level, select the level in the hierarchy. Use the **Filter** option to search for a curriculum by name.. Click a curriculum tile to view additional curriculum information and curriculum management options.

Adding a new curriculum

To add a new curriculum:

1. In the categories bar, select **Curricula**.
2. Select the appropriate level in the Hierarchy.
3. Select Add New Curriculum from the other options list.
4. Add the curriculum details:

   Curriculum Name
   This is the only required field.

   IMS Curriculum ID
   Specify an IMS Curriculum ID for the curriculum.

   Parent IMS Curriculum ID
   Specify a Parent IMS Curriculum ID.

   Area
   Specify an area of relevance for the curriculum if the curriculum is intended to only be assigned to users in that area, for example, New England. This is an informational field that is only used as a reference point for administrators and managers. It is not utilized by the system.

   Curriculum Short Name
   Specify an alternative version of the curriculum name, such as a short name, curriculum number, or other identifier.

   Duration Days
   Specify the expected duration of the course in days for display in Infor Learning Management Portal. The number can be fractional.

Duration Hours
Specify the expected duration of the course. The number can be fractional. If you want duration hours to display in Infor Learning Management Portal instead of days, select **Duration in Hours**.

In Hours
Select this field to have the value in **Duration Hours** display in Infor Learning Management Portal instead of **Duration Days**. By default, the system will display the value in days.

Description
Specify a description or overview of the curriculum. Only the fields that contain text will be displayed in Infor Learning Management Portal.

Default
Select to set the curriculum as default for the selected level and the levels below it. This check box is only enabled at Level 2 or below.

Self Registration
Select to enable users to self-register to the curriculum at the selected level. This option is available only at Level 2 or below. If you select this option and also select **Add to Children**, then self registration will be enabled at the selected level and all levels below it.

Add to Children
Select to add the curriculum to all levels below the selected level. This option is only available at Level 2 or below.

Mandatory
Select to set the curriculum as mandatory for all users.

Active
Select to make the curriculum active.

Blended
Select to allow the curriculum to contain both online and classroom events.

Enable Automatic Distribution
Select to allow the system to perform automatic distribution of the curriculum based on the rules specified for it. The rules that govern how a curriculum is handled during automatic distribution are set using **Distribution Rules**. For more information, see Distribution Rules on page 151.

Common Fields
Specify or select the desired value in the relevant field for each common field listed.

Custom Fields
Specify or select the desired value in the relevant field for each custom field listed.

5 Click **Save** and then click **OK** on the success message.

Assign courses to the curriculum. Open the curriculum record and select **Manage Courses**. For more information, see Managing courses in a curriculum on page 150.

Adding curricula to the current level

Once a curriculum is defined, you can add it to other hierarchy levels. You can add one or more existing curricula to the currently selected level. Adding curricula will also add the associated courses to the level.

Note: If the curriculum you add is from a hierarchy level above the parent level, any curriculum added to the current level will be added to all levels between the current level and the level where the curriculum originates.

To add curricula to the current level:

1. In the categories bar, select **Curricula**.
2. Select the appropriate Level 2 or below in the hierarchy (this option is not enabled at the System level.)
3. Select Add Existing Curricula to the Current Level from the other options list.
4. To locate one or more curricula that you want to add to the selected level, use the search options or click **Show All** to display all curricula.
5. Use **Only Show Curricula in Parent Level** to display curricula that exist in the parent level of the currently selected level.

   You may only have the ability to add curricula from your currently selected level's parent level. Depending on your rights you may have the option to change this so that you can see all available curricula.
6. Select each curriculum you want to add to the current level.
7. Click **Add**.
8. To add existing events that are associated with the selected curricula:
   a. Select one or more events that you want to add.
   b. Click **Add**. A successful message is displayed.
   c. When you are done adding events, click **Finish** to return to the main Add Existing Curricula to the Current Level page.
9. A successful message is displayed.

Running the Curricula Distribution process

Use **Curricula Distribution** to specify user attributes that the system will use as criteria to automatically distribute curricula to users. You can automatically assign curricula to users instead of assigning it to them manually one-by-one or making a curriculum default for a level.

Note:

- Curricula that are set as default in a level cannot be removed by this utility.
- Curricula that are assigned manually using the **Manual Curricula Distribution** option cannot be removed automatically by the utility.
- Setting a curricula as manual instead of automatic is a system-wide change for that curricula, even if it is done at a Level 2 and exists in multiple Level 2s.

To run the curricula distribution process:

1. Select **Curricula > Hierarchy level 2 >** Curricula Distribution.
2. To manually begin the distribution process, click **Run**.
3. To view process history, click Distribution Process Log.

Viewing the curricula distribution process log

To view or save a log file of previous distribution activities:

1. On the Curricula Distribution page, click Distribution Process Log.
2. Click **Save**.
3. Browse to a place on your computer to save the log and specify the name for the log file.
4. Click **Save**.

Viewing a curriculum

View details such as curriculum ID, name, description, registration status, default status, custom fields, courses, and certification programs associated with a curriculum.

To view curriculum details:

1. In the categories bar, select **Curricula**.
2. Select the appropriate level in the hierarchy.
3. Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4. Select the curriculum in the results table to open the curriculum record.

   The curriculum information will display by default. If it does not, or if you select another option and want to view this information again, click **More Options** and select **View Curriculum**.
5. To view information on the courses attached to the curriculum, click **Courses**.

Editing a curriculum

You can add or change information about a curriculum, such as name and descriptions, as well as change settings such as how it will be distributed to levels and users, whether it is mandatory, and whether it is active. You can also set common and custom field values through this option.

To edit a curriculum:

1. In the categories bar, select **Curricula**.

2 Select the appropriate level in the hierarchy.
3 Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4 Select the curriculum in the results table to open the curriculum record.
5 In **More Options**, click **Edit Curriculum**.
6 Edit the curriculum details:

Curriculum Name
This is the only required field.

IMS Curriculum ID
Specify an IMS Curriculum ID for the curriculum.

Parent IMS Curriculum ID
Specify a Parent IMS Curriculum ID.

Area
Specify an area of relevance for the curriculum if the curriculum is intended to only be assigned to users in that area, for example, New England. This is an informational field that is only used as a reference point for administrators and managers. It is not utilized by the system.

Curriculum Short Name
Specify an alternative version of the curriculum name, such as a short name, curriculum number, or other identifier.

Duration Days
Specify the expected duration of the course in days for display in Infor Learning Management Portal. The number can be fractional.

Duration Hours
Specify the expected duration of the course. The number can be fractional. If you want duration hours to display in Infor Learning Management Portal instead of days, select **Duration in Hours**.

In Hours
Select this field to have the value in **Duration Hours** display in Infor Learning Management Portal instead of **Duration Days**. By default, the system will display the value in days.

Description
Specify a description or overview of the curriculum. Only the fields that contain text will be displayed in Infor Learning Management Portal.

Default
Select to set the curriculum as default for the selected level and the levels below it. This check box is only enabled at Level 2 or below.

Self Registration
Select to enable users to self-register to the curriculum at the selected level. This option is available only at Level 2 or below. If you select this option and also select **Add to Children**, then self registration will be enabled at the selected level and all levels below it.

Add to Children
Select to add the curriculum to all levels below the selected level. This option is only available at Level 2 or below.

Mandatory
Select to set the curriculum as mandatory for all users.

Active
Select to make the curriculum active.

Blended
Select to allow the curriculum to contain both online and classroom events.

Enable Automatic Distribution
Select to allow the system to perform automatic distribution of the curriculum based on the rules specified for it. The rules that govern how a curriculum is handled during automatic distribution are set using **Distribution Rules**. For more information, see Distribution Rules on page 151.

Common Fields
Specify or select the desired value in the relevant field for each common field listed.

Custom Fields
Specify or select the desired value in the relevant field for each custom field listed.

7 Click **Save** and then click **OK** on the success message.

Removing a curriculum

You can remove a curriculum from the system. This affects the curriculum only, not the courses associated with it. Any courses related to the curriculum will still exist within the system after the curriculum is deleted.

To remove a curriculum:

1 In the categories bar, select **Curricula**.
2 Select the appropriate level in the hierarchy.
3 Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4 Select the curriculum in the results table to open the curriculum record.
5 In **More Options**, click **Remove Curriculum**. You can review the curriculum details and courses associated with the curriculum.
6 Click **Remove**.

Viewing curriculum levels

You can view all the hierarchy levels to which a curriculum has been assigned.

To view the curriculum levels:

1. In the categories bar, select **Curricula**.
2. Select the appropriate level in the hierarchy.
3. Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4. Select the curriculum in the results table to open the curriculum record.
5. In **More Options**, click **View Curriculum Levels**. A check mark displays next to each level in the hierarchy the curriculum is assigned to.

Managing levels for a curriculum

You can control which levels a curriculum is available in as well as in which levels a curriculum is set as default.

To manage levels for a curriculum:

1. In the categories bar, select **Curricula**.
2. Select the appropriate level in the hierarchy.
3. Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4. Select the curriculum in the results table to open the curriculum record.
5. In **More Options**, click **Manage Levels**. A check mark displays next to each level in the hierarchy the curriculum is assigned to.
6. To specify which levels a curriculum is available in:
   a. On **Set Curriculum at Level**, locate the level in the tree view.
   b. To have the curriculum added to or removed from all sub-levels as you make level selections, select **Automatically check/uncheck sub-levels** at the bottom of the content area.
   c. To add or remove the curriculum from a level, select or clear the check box next to the level name.
   d. Click **Save**.
7. To specify which levels a curriculum is set as default in:
   a. On **Set Curriculum as Default at Level**, locate the level in the tree view.

      Before you can set a curriculum as default in a level you must first add the curriculum to that level.
   b. To make the curriculum default or remove it as default in all sub-levels as you make level selections, select **Automatically check/uncheck sub-levels** at the bottom of the content area.

c. To make a curriculum default or remove it as default from a level, select or clear the check box next to the level name.
d. Click **Save**.

Managing visible and editable levels for a curriculum

You can control which levels a curriculum is in and in which levels it can be edited.

To manage visible and editable levels for a curriculum:

1. In the categories bar, select **Curricula**.
2. Select the appropriate level in the hierarchy.
3. Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4. Select the curriculum in the results table to open the curriculum record.
5. In **More Options**, click **Manage Visible/Editable Levels**.
6. To specify which levels a curriculum is visible in:
   a. On **Visible Levels**, locate the level in the tree view.
   b. To have visibility added to or removed from the curriculum in all sub-levels as you make level selections, select **Automatically check/uncheck sub-levels** at the bottom of the content area.
   c. To add or remove visibility of a curriculum from a level, select or clear the check box next to the level name.
   d. Click **Save**.
7. To specify which levels a curriculum can be edited in:
   a. On **Editable Levels**, locate the level in the tree view.
   b. To make the curriculum editable or not editable in all sub-levels as you make level selections, select **Automatically check/uncheck sub-levels** at the bottom of the content area.
   c. To make a curriculum editable or not in a level, select or clear the check box next to the level name.
   d. Click **Save**.

Managing catalogs in a curriculum

You can add or remove catalogs from a curriculum. Removing a catalog from a curriculum does not delete it from the system, it only breaks the association between the curriculum and the catalog.

To add or remove catalogs in a curriculum:

1. In the categories bar, select **Curricula**.
2. Select the appropriate level in the hierarchy.

3 Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4 Select the curriculum in the results table to open the curriculum record.
5 In **More Options**, select **Manage Catalogs**.
6 To export information on the curriculum and associated catalogs, click Export to Excel and choose where to save the data file.
7 To add a catalog to the curriculum:
   a In the Available Catalogs list, use the search to locate the catalogs you want to add.
   b Select the check box next to the catalog or catalogs you want to add.
   c Click **Add catalogs**.
8 To remove a catalog from the curriculum:
   a In the Existing Catalogs list, select the check box next to the catalog or catalogs that you want to remove.
   b Click **Remove**.

Managing courses in a curriculum

Add, remove, or rearrange courses in a curriculum. Removing a course from a curriculum does not delete the course, it only breaks the association between the curriculum and the course.

To add or remove courses in a curriculum:

1 In the categories bar, select **Curricula**.
2 Select the appropriate level in the hierarchy.
3 Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4 Select the curriculum in the results table to open the curriculum record.
5 In **More Options**, select **Manage Courses**.
6 To add a course to the curriculum:
   a In the Available Courses list, use the search to locate the courses you want to add.
   b Select the check box next to the course or courses you want to add.
   c Click **Add courses**.
7 To change the sequence of the courses in a curriculum:
   a In the Existing Courses list, specify the course sequence numbers by entering them directly or using the arrows to change them.

   When changing sequence numbers by using the arrows be aware the system avoids duplication of a sequence number by automatically adjusting other instances of the same number. For example, if you have three courses and you want the Course A to be 1, Course B to be 2, and Course C to be 3 and have adjusted the Course B already, when you adjust the sequence number of Course C by clicking the up arrow from 1 to 2 you will see the system changes Course B to 3 to avoid duplication. This will automatically correct itself when you change Course

C to 3. There are cases where the number may be bumped and result in an unintended sequence change.

b Click **Apply Sequence**.

8 To remove a course from the curriculum:

a In the Existing Courses list, select the check box next to the course or courses that you want to remove.

b Click **Remove**.

Defining completion rules for a curriculum

You can enable completion rules for the curriculum. Set the total number of credits required to complete the curriculum, specify whether a course is mandatory or elective, and specify the number of credits awarded for successful completion of each course.

To define completion rules:

1. In the categories bar, select **Curricula**.
2. Select the appropriate level in the hierarchy.
3. Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4. Select the curriculum in the results table to open the curriculum record.
5. In **More Options**, click **Completion Rules**.
6. Select **Completion Rules Active**.
7. For each course, use **Course Classification** to designate the course as mandatory or elective.
8. Specify the number of credits awarded for successful completion of each course in **Credits**.
9. Specify the total number of credits needed to successfully complete the curriculum in **Credits Required to Pass**.
10. Click **Update**.

Managing distribution rules for curricula

If the curriculum has been set up for automatic distribution, you can specify how the curriculum will be distributed.

Curricula that are set up for automatic distribution can be distributed three ways:

- during a daily batch job
- when the process is run manually for a cirriculum by clicking the **Run** in the **Manage Distribution Rules** view
- through the Curricula Distribution option on the main Curricula page

To manage distribution rules:

1 In the categories bar, select **Curricula**.
2 Select the appropriate level 2 or below in the hierarchy. Curricula distribution rules can not be edited at the system level.
3 Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4 Select the curriculum in the results table to open the curriculum record.
5 In **More Options**, click **Distribution Rules**.
6 To manually run the distribution process for this curriculum using the existing distribution rules, click **Run**.
7 To add a new distribution rule to the curriculum, click **Add New**. This creates a blank, unnamed rule that can be configured using the following options.

   As part of adding a new rule, you will define the conditions for the rule. These conditions will be used to select and add users to the curriculum.

   Note: If needed, use multiple condition lines to match the users more precisely. For example, you can match the users by the country, however, you may not want to include all users from that country. You can create two condition lines and set one to match the country, and another to match a specific city and the users who live in that country and city will be included. You can create rules based on the AND logic and OR logic.

   a Specify the **Distribution Rule Name**.
   b Click the add line icon (+) to create a new condition line.
   c In the first field, select the data field that will be evaluated to see if the user meets the selection criteria. Additional fields are displayed for building the condition.
   d In the second field, select the type of comparison that will be used to evaluate the condition. You can select **`Contains`**, **`Starts with`**, or **`Equal to`**.
   e In the last field, enter the specific value that the data field should be evaluated against using the above condition to determine whether the user is a match for the rule.

8 To remove a distribution rule, select the rule in the table and click the remove icon (X) at the left end of the relevant row. Click **OK** on the verification message.
9 To have the system retain the users who were previously assigned to the curriculum when this distribution rule is run, check **Keep existing users**. If this field is not selected, users previously assigned to this curriculum who do not currently meet the distribution rule criteria will be removed from the curriculum when it is run.
10 To utilize curriculum schedules when this distribution rule is applied:
   a Select **Curriculum Schedules**. A list opens.
   b Select the curriculum schedules you want from the list.
   c When you are done selecting schedules, click **OK**.

11 To edit the existing curriculum schedules settings:
   a Click Edit next to Curriculum Schedules.
   b Make the changes you want to the settings.
   c Click **OK**.

12 To select existing events that the users selected by the distribution rules will be enrolled in when the rule is run:

   a Select **Events**. A list opens.
   b Select the events you want from the list.
   c When you are done selecting events, click **OK**.

13 To edit the existing events settings:
   a Click Edit next to Events.
   b Make the changes you want to the settings.
   c Click **OK**.

14 To assign the catalogs associated with the curriculum to the user when the distribution rule is run, select **Assign associated catalogs**.

   This field is visible and available only if you have a Level 2 selected in the hierarchy.

15 To obtain a log of the previous distribution activities for this curriculum, click Distribution Process Log and save the text file to your computer.

16 To disassociate the users from courses, schedules, and events, when they have been removed from the curricula, select **Remove users from associate Courses, Schedules, and Events when they are removed from the curricula**.

   Note: This option can be selected only if the **Keep existing users** option is not selected.

17 Click **Save**.

Assigning Distribution Groups

1 To assign a distribution group, select the group from the **Available Distribution Groups** list and click **Assign.**

2 To remove an assigned distribution group, select the group from the **Assigned Distribution Groups** list and click **Remove**.

Managing users for a curriculum

You can assign users to or remove user from the curriculum.

To manage users for a curriculum:

1 In the categories bar, select **Curricula**.
2 Select the appropriate level in the hierarchy.
3 Optionally, use the search functions to find the curriculum.
4 Select the curriculum in the results table to open the curriculum record.
5 Click **Users**.
6 Select **Manage Users**.
7 To add all users in the current level to the curriculum, click Assign all users from level.
8 To add or remove specific users, use the search options to filter the user list and select the users:

   a Click Add criteria to create a search filter criteria.
   b Select the data field that will be examined by the search criteria in the first drop down list.
   c Select the type of evaluation that will be performed on that field from the second drop down list.
   d Enter a string of text and/or numbers that will be used in the search on the field you have selected.
   e Click **Search** on the right side of the screen.
   f To further refine your search results, add additional criteria that will more precisely target the desired users.
   g To remove an existing search filter criteria, click remove (X) at the left end of that criteria line.
   h Select the check box next to the name of one or more users.

9. To assign the users you selected to the curriculum, click **Assign**.
10. To remove the users you selected from the curriculum, click **Remove**.

Resetting user status for a curriculum

Resetting users' curriculum status changes a curriculum that a user has completed to incomplete. This allows users to retake the courses in the curriculum for re-certification purposes.

Resetting user status for curricula is irreversible. Before you start, make sure you understand what will happen. See About resetting curriculum completion status on page 65.

Note: To reset multiple curricula for an individual user, use the **Reset Curriculum Tracking Data** option. See Resetting user curriculum tracking data on page 65.

To reset a curriculum for multiple users at once:

1. In the categories bar, select **Curricula**.
2. Select the appropriate level in the hierarchy.
3. Optionally, use the search functions to find the curriculum.
4. Select the curriculum in the results table to open the curriculum record.
5. Click **Users**.
6. Select **Reset User Status**.
7. To locate one or more users that you want to reset, use the search options or click **Show All** to display all users.
8. Select the users you want to reset.
9. Click **Set to Incomplete**.

   Note: You can manually re-grant credit to a user for courses in a curriculum that have been reset.

Managing enrollment and cancellation values for a curriculum

You can manually edit the values submitted by users in response to enrollment or cancellation prompts. Values can be edited on a per-user basis or for all curriculum schedule users.

To edit enrollment or cancellation values:

1. In the categories bar, select **Curricula**.
2. Select the appropriate Level 2 or below from the hierarchy (this option is not enabled at the System level).
3. Optionally, use the search functions to find the curriculum.
4. Select the curriculum in the results table to open the curriculum record.
5. Click **Users**.
6. Select **Manage Enrollment/Cancellation Template Values**.
7. Select the schedule in the **Curriculum Schedule** list.
8. Select either the Enrolled or Cancelled tab to view and edit the relevant template values.

   Enrolled shows enrollment template values submitted during the enrollment process or edited afterward, Cancelled shows cancellation template values submitted by users during the process of cancelling their enrollment.
9. To manually change a template value for all listed users:
   a. Enter the template value that you want to assign to all listed users in the relevant field to the right of the Change values for all users in this section text.

      If there are multiple template values on the currently selected Enrolled/Cancelled tab, you will see each listed separately in this area. Make sure that you select the correct one when making this type of change as this process will overwrite the values for the selected template for all listed users.
   b. Enter the template value that you want to assign to all listed users in the relevant field to the right of the "Change values for all users in this section" text.
   c. Click **Save**.
10. To manually change a template value for a specific user:
    a. Use the search options to find the user.
    b. Click inside the data field of the template value and edit the text or selection.
    c. Click **Save**.

       You can change multiple values for different listed users prior to clicking **Save** as long as you do not reload the list of users. Reloading the list by changing template tabs or using the search options will erase any unsaved changes.

Reports

The following table shows reporting options available in the **Curricula** category.

Standard Reports	
Report	**Description**
Curriculum Sessions -- by Course on page 262	View session information for each course within a selected curriculum.
Curriculum Sessions -- By Users on page 262	View user sessions within a selected curriculum.

Adding a new schedule for a curriculum

You can create a new schedule for the curriculum.

To add a new schedule:

1 In the categories bar, select **Curricula**.
2 Select the appropriate level in the hierarchy.
3 Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4 Select the curriculum in the results table to open the curriculum record.
5 Click **Schedule**, then **Add New**.
6 Specify this information:

Schedule Name
Specify the name of the schedule.

IMS Schedule ID
Specify a unique IMS identifier to the schedule that is displayed in reports.

Location
Specify a location that will be associated with the schedule, such as the country or city in which the user group is located.

Language
You can specify a language other than the Master language that should be used to display the schedule in the Portal.

Self Registration
Select to allow users to self-register to the curriculum schedule.

Self Cancellation
Select to allow users to self-cancel from the curriculum schedule.

7 Define the course-specific settings for the courses in this curriculum. Specify this information:

Included
Select the check box to include the listed course in the schedule.

Sequence
Specify the sort order. Change the number to change the order in which the listed courses are displayed.

Event Name
Select the event of the course that users will be enrolled into.

8. Define the curriculum schedule properties. Specify this information:

   Duration Days
   Specify the expected duration of the curriculum schedule in days, this value can be fractional, such as 2.5 days.

   Duration Hours
   Specify the number of hours (this can be fractional, such as 3.5 hours).

   Duration in Hours
   Select this field to indicate that the value in Duration Hours should be displayed instead of the value in Duration Days.

   Description
   Specify information about the curriculum schedule. There are six fields available to use as you wish, but only those fields that contain information will be displayed in the Portal.

9. If common fields on page 402 exist for the curriculum, navigate to the Hierarchy level at which the curriculum was created to view and edit the related common field values.
10. To save the schedule and create an alternate language version, click Save & Add Another Language.
11. To save the schedule without creating an alternate language version, click **Save**.

Removing a schedule from a curriculum

You can remove an existing schedule from a curriculum.

To remove a schedule:

1. In the categories bar, select **Curricula**.
2. Select the appropriate level in the hierarchy.
3. Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4. Select the curriculum in the results table to open the curriculum record.
5. Click **Schedule**, then **Remove**.
6. Select the check box next to one or more schedules you want to remove.
7. Click **Remove** and click **OK** on the success message.

Managing users for a curriculum schedule

You can assign users to or remove users from the curriculum schedule

To manage users for a curriculum schedule:

1. In the categories bar, select **Curricula**.
2. Select the appropriate level in the hierarchy.
3. Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4. Select the curriculum in the results table to open the curriculum record.
5. Click **Schedule**, then **Manage Users**.
6. To add all users in the current level to the curriculum schedule, click Assign all users from level.
7. To add or remove specific users to the curriculum schedule, use the search options to filter the user list and select the users:
   a. Click Add criteria to create a search filter criteria.
   b. Select the data field that will be examined by the search criteria in the first drop down list.
   c. Select the type of evaluation that will be performed on that field from the second drop down list.
   d. Enter a string of text and/or numbers that will be used in the search on the field you have selected.
   e. Click **Search** on the right side of the screen.
   f. To further refine your search results, add additional criteria that will more precisely target the desired users.
   g. To remove an existing search filter criteria, click remove (X) at the left end of that criteria line.
   h. Select the check box next to the name of one or more users.
8. To assign the users you selected to the schedule, click **Assign**.
9. To remove the users you selected from the curriculum schedule, click **Remove**.

Viewing a curriculum schedule

You can review information and settings specific to the currently selected curriculum schedule.

To view a curriculum schedule:

1. In the categories bar, select **Curricula**.
2. Select the appropriate level in the hierarchy.
3. Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4. Select the curriculum in the results table to open the curriculum record.
5. Click **Schedule**, then **View**.

Editing a schedule for a curriculum

You can change the details of a curriculum schedule.

To add a edit a schedule:

1. In the categories bar, select **Curricula**.
2. Select the appropriate level in the hierarchy.
3. Locate the curriculum in the results table. If you do not see the curriculum you want, use the Search functions to find it.
4. Select the curriculum in the results table to open the curriculum record.
5. Click **Schedule**, then **Edit**.
6. Specify this information:

   Schedule Name
   Specify the name of the schedule.

   IMS Schedule ID
   Specify a unique IMS identifier to the schedule that will appear in reports.

   Location
   Specify a location that will be associated with the schedule, such as the country or city in which the user group is located.

   Language
   You can specify a language other than the Master language that should be used to display the schedule in the Portal.

   Active
   Select this field if you want the curriculum schedule to be available in Portal.

   Self Registration
   Select to allow users to self-register for the curriculum schedule. If selected, Active check box must be selected.

   Self Cancellation
   Select this field to allow users to self-cancel from the curriculum schedule. If selected, Active check box must be selected.

7. Define the course-specific settings for the courses in this curriculum. Specify this information:

   Included
   Select to include the listed course in the schedule.

   Sequence
   Specify the sort order. Change the number to change the order in which the listed courses will appear.

   Event Name
   Select the event of the course that users will be enrolled into.

8. Define the curriculum schedule properties. Specify this information:

Duration Days
Specify the expected duration of the curriculum schedule in days, this value can be fractional, such as 2.5 days.

Duration Hours
Specify the number of hours (this can be fractional, such as 3.5 hours).

In Hours
Select this field to indicate that the value in Duration Hours should be displayed instead of the value in Duration Days.

Description
Specify information about the curriculum schedule. There are six fields available to use as you wish, but only those fields that contain information will be displayed in the Portal.

9. If common fields on page 402 exist for the curriculum, navigate to the Hierarchy level at which the curriculum was created to view and edit the related common field values.
10. Click **Save**.

Catalogs

A list of all catalogs in levels that are assigned to the logged in Administrator is displayed by default when the **Catalogs** category is selected. To limit the catalogs to a specific level, select the level in the hierarchy. Use the **Filter** option search for a catalog by name. Click a catalog tile to view the catalog details and catalog management options.

Adding a new catalog

To add a new catalog:

1. In the categories bar, select **Catalogs**.
2. Select the appropriate level in the hierarchy.

   Note: While the Add New Catalog option can be used at any Hierarchy level, the following options only appear at Level 2 or below:

   - Active
   - Default
   - Enable Automatic Distribution
3. Select **Add New Catalog**.
4. Specify this information:

   Catalog Name
   Specify the title of the catalog.

   Description
   Specify a description or overview of the catalog.

   Active
   Select to make the catalog active.

   Default
   Select to make the catalog default for the level.

   Enable Automatic Distribution
   Select to enable automatic distribution of the catalog.

Allow Pulling Content by Lower Level Administrators
Select to allow administrators on lower levels to add or replace curriculum in the catalog. Changes to the catalog by administrators on lower levels will only affect those levels where the changes are made. They will not change the catalog at the parent level or any other level.

Add to Sub-Levels
Select to add the catalog to all levels below the current level.

5 Assign values to the common fields associated with this catalog. Select the values from the drop down lists or enter them in the relevant fields.
6 To save the new catalog and add an alternate language version to it, click Save & add another language.
7 Click **Save**.

Running the Catalogs Distribution process

You can manually distribute all catalogs according to their distribution rules.

To run the catalogs distribution process:

1. In the categories bar, select **Catalogs**.
2. Select the appropriate level in the hierarchy.
3. Select Catalogs Distribution from the other options list.
4. To manually begin the distribution process, click **Run**.

Viewing the catalogs distribution log file

To view or save a log file of previous distribution activities:

1. On the Catalogs Distribution page, click Distribution Process Log.
2. Click **Save**.
3. Browse to a place on your computer to save the log and specify the name for the log file.
4. Click **Save**.

Viewing a catalog

To view a catalog:

1. In the categories bar, select **Catalogs**.
2. Select the appropriate level in the hierarchy.

3 Locate the catalog in the results table. If you do not see the catalog you want, use the Search functions to find it.
4 Select the catalog in the results table to open the record.
  The catalog information will display by default. If it does not, or if you select another option and want to view this information again, click **More Options** and select **View**.
5 To view information on the curriculum and resources attached to the catalog, scroll to the bottom of the content area and click the arrow next to the catalog name to expand it.
  To view schedule and course information for a curriculum, click the triangular arrow located to the left of the curriculum name to expand it.

Removing a catalog from a level

You can remove a catalog from a specific level and from its sub-levels.

Note: This option does not delete the catalog from the system. This option only removes the catalog from one or more levels.

To remove a catalog from a level:

1 In the categories bar, select **Catalogs**.
2 Select the appropriate level in the hierarchy.
3 Locate the catalog in the results table. If you do not see the catalog you want, use the Search functions to find it.
4 Select the catalog in the results table to open the record.
5 In **More Options**, click **Remove**.
6 On the confirmation message, Are you sure you want to remove the catalog? select or clear **Remove from Sub-Levels** and then click **Yes**.

Editing a catalog

You can change the details of the catalog. However, you cannot change the curricula and resources from this page. See Managing curricula and resources for a catalog on page 164.

To edit a catalog:

1 In the categories bar, select **Catalogs**.
2 Select the appropriate level in the hierarchy.
3 Locate the catalog in the results table. If you do not see the catalog you want, use the Search functions to find it.
4 Select the catalog in the results table to open the record.
5 In **More Options**, click **Edit**.

6 You can edit this information:

Catalog Name
Specify the title of the catalog.

Description
Specify a description or overview of the catalog.

Active
Select to make the catalog active.

Default
Select to make the catalog default for the level.

Enable Automatic Distribution
Select to enable automatic distribution of the catalog.

Allow Pulling Content by Lower Level Administrators
Select to allow administrators on lower levels to add or replace curriculum in the catalog. Changes to the catalog by administrators on lower levels will only affect those levels where the changes are made. They will not change the catalog at the parent level or any other level.

Add to Sub-Levels
Select to add the catalog to all levels below the current level.

7 Assign values to the common fields associated with this catalog. Select the values from the drop down lists or enter them in the relevant fields.
8 Click **Save**.

Managing curricula and resources for a catalog

To add and remove curricula and resources for a catalog:

1. In the categories bar, select **Catalogs**.
2. Select the appropriate level in the hierarchy.
3. Locate the catalog in the results table. If you do not see the catalog you want, use the Search functions to find it.
4. Select the catalog in the results table to open the record.
5. In **More Options**, click **Manage Curricula and Resources**.
6. To export information on the current catalog and its curriculum and resources in an Excel spreadsheet, click the Export to Excel link.
7. To add or remove courses associated with the catalog, click the Curricula tab.
   a. To remove a curriculum from the catalog, in the Existing Curricula section, select one or more curricula that you want to remove and click **Remove**.
   b. To add a curriculum to the catalog, in the Available Curricula section, select one or more curricula that you want to add to the catalog and click **Add**.

8 To add or remove resources associated with the catalog, click the Resources tab.
   a To remove a resource from the catalog, in the Existing Resources section, select one or more resources that you want to remove and click **Remove**.
   b To add a resource to the catalog, in the Available Resources section, select one or more resources that you want to add to the catalog and click **Add**.

Activating or deactivating a catalog in a level and sub-levels

To activate or deactivate a catalog in a level and sub-levels:

1. In the categories bar, select **Catalogs**.
2. Select the appropriate level in the hierarchy.
3. Locate the catalog in the results table. If you do not see the catalog you want, use the Search functions to find it.
4. Select the catalog in the results table to open the record.
5. In **More Options**, click **Activate**.
6. To activate or deactivate the catalog, select or clear **Activate Catalog**.
7. To apply this change to all sub-levels of the current level, check **Apply for Sub-Levels**.
8. Click **Save**.

Managing users for a catalog

To assign or remove a catalog from specific users:

1. In the categories bar, select **Catalogs**.
2. Select the appropriate level in the hierarchy.
3. Locate the catalog in the results table. If you do not see the catalog you want, use the Search functions to find it.
4. Select the catalog in the results table to open the record.
5. In **More Options**, click **Manage Users**.
6. To remove existing users from the catalog:
   a If needed, you can filter the list of users displayed.
      Define search criteria:
      - Click Add criteria.
      - Select a data field to filter users by.
      - Select the parameters related to that data field that need to be met to display a user in the search results.

- If desired, create additional criteria to further narrow the list.
- Click **Search** to apply the specified criteria. Multiple criteria are applied in an "and" fashion, so all listed criteria must be met at the same time.

b In the Existing Users section, select one or more users that you want to remove from the catalog.

c Click **Remove**.

7 To add available users to the catalog:

a If needed, you can filter the list of users displayed.

Define search criteria:

- Click Add criteria.
- Select a data field to filter users by.
- Select the parameters related to that data field that need to be met to display a user in the search results.
- If desired, create additional criteria to further narrow the list.
- Click **Search** to apply the specified criteria. Multiple criteria are applied in an "and" fashion, so all listed criteria must be met at the same time.

b In the Available Users section, select one or more users that you want to add to the catalog.

c Click **Add**.

Managing levels for a catalog

To add or remove levels for a catalog:

1. In the categories bar, select **Catalogs**.
2. Select the appropriate level in the hierarchy.
3. Locate the catalog in the results table. If you do not see the catalog you want, use the Search functions to find it.
4. Select the catalog in the results table to open the record.
5. In **More Options**, click **Manage Levels**.
6. To have the catalog added to or removed from sub-levels along with the selected level, select or clear **Automatically check/uncheck sub-levels**.
7. To have catalog content such as curricula, courses, and resources added to levels along with the catalog, check **Add Catalog content to selected levels**.
8. Select or clear the check box next to the level name to add or remove the catalog from one or more specific levels (and sub-levels, if that option is selected).
9. Click **Save**.

Managing distribution rules for catalogs

If the catalog has been set up for automatic distribution, you can specify how the catalog will be distributed.

Catalogs that are set up for automatic distribution can be distributed three ways:

- during a daily batch job
- when the process is run manually for a catalog by clicking the **Run** in the **Manage Distribution Rules** view
- through the **Catalogs Distribution** option in the main **Catalogs** view

To manage distribution rules:

1. Select **Catalogs**.
2. Select the hierarchy level.
3. Locate and select the catalog.
4. Click **General Options** and then click **Manage Distribution Rules**.
5. To distribute the catalog according to the currently specified rules and options, click **Run**.
6. To add a new distribution rule, click **Add Rule**.
   a. Specify the distribution rule name.
   b. Select the common field to be evaluated.
   c. Select the type of comparison to be used to evaluate the condition.
   d. Specify the value or values for common field that satisfy the criteria.
   e. Repeat the process as necessary to add additional distribution rules.
7. To remove a distribution rule, select the rule in the table and click the remove icon. Click **OK** on the verification message.
8. To edit a distribution rule:
   a. To change the name of the rule, edit the name in the **Distribution Rule Name** field.
   b. To change the common field that will be evaluated by the rule, change the selection in the first drop down list.
   c. To change how the rule will be evaluated, make changes as necessary to the rest of the rule.
9. To specify whether the users who were previously assigned to the catalog will be kept or removed when the distribution process runs, select **Keep existing users** to keep them, or clear it to remove them.
10. To specify whether or not relevant curricula should be distributed with the catalog, select or clear **Curricula**. Checking this check box will enable the following two additional options, though only one of these may be selected.
    - Events - to assign and include curriculum schedules with the curricula when the catalog is distributed:
      a Select **Curriculum Schedules**.
      b If it is already selected and you want to edit the selected curricula schedules, click Edit.
      c In the popup window, select the schedule for each curriculum. It is not necessary to assign a schedule to every curriculum.
      d Click **OK**.

- Events - to assign and include events to the courses in the curricula when the catalog is distributed:
  - **a** Select **Events**.
  - **b** If it is already selected and you want to edit the selected course events, click Edit to the right of Events.
  - **c** In the popup window, select the event for each course listed within each curriculum. It is not necessary to assign an event to each course.
  - **d** Click **OK**.

11 To remove the users from the curricula and courses for which they are registered, select **Remove users from associated curricula and courses**.

Note: This option can be selected only if the**Keep existing users** option is not selected.

12 To create a text log of distribution activity and save it to your computer:

- a Click Distribution Process Log in the lower right corner.
- b Click **OK** on the prompt box.
- c Select where to save the log file on your computer and click **Save**.
- d You can now navigate to where you saved the file on your computer and open it to view the log.

13 Click **Save**.

Using the catalog Content Wizard

On this page you can add or remove curricula from the catalog on a specific level, pull down curricula from the parent level and the System level to be added to the catalog on the current level, and specify which levels changes made in this section should be applied to along with propagation and catalog update notification options.

To use the catalog content wizard:

1. In the categories bar, select **Catalogs**.
2. Select the appropriate level in the hierarchy.
3. Locate the catalog in the results table. If you do not see the catalog you want, use the Search functions to find it.
4. Select the catalog in the results table to open the record.
5. In **More Options**, click **Content Wizard**.
6. Add or remove curricula from the catalog on a specific level and make curricula mandatory for the catalog on the **Current Level** tab.
   - To make a curriculum mandatory, click the icon in the Mandatory column of the Curricula belonging to Catalog section.
   - To resize the visible area of the curricula lists, click and hold the **=** icon located below the Curricula belonging to Catalog section and drag it up or down.
   - To remove one or more curricula from the catalog:

   a. In the Curricula belonging to Catalog section, select one or more curricula that you want to remove.
   b. Click **Remove**.
- To add one or more curricula to the catalog:
   a. Locate the curricula in the Select Curricula existing on current Level section.
   b. Select one or more curricula that you want to add.
   c. Click **Apply**.
- To proceed to the next step of the wizard, click **Next**.

7. Pull down curricula from the parent level and the System level to be added to the catalog on the current level on the **Higher Level** tab.
   - To include curricula from the System level in the list of higher level curricula that can be added to the catalog, check **Show Curricula from System Level**.
   - To add one or more curricula to the catalog, select the curricula that you want to add.
     Note: Curricula added to the catalog in this step will not actually be added until **Finish** is clicked in the final step of this wizard.
   - To make a curriculum mandatory when it is added to the catalog, click the relevant icon in the Mandatory column.
   - To proceed to the next step of the wizard, click **Next**.
8. On the **Options** tab,
   - To specify which levels changes made in this section should be applied to, select the levels in the Hierarchy tree view on the left. Click the triangular arrows to expand a level to view its sub-levels, if necessary.
   - To select which types of items will be propagated to the selected levels, select either:
     - **Propagate all** to include curricula schedules, courses, and events
     - **Propagate following**, which then lets you to select one or more of the following types to include: Curricula, Curricula Schedule, Courses, Events
   - To select the type of level notifications that should be sent regarding these catalog changes, select from the following:
     - At all sub-levels
     - At all sub-levels where changes apply
     - At all sub-levels where changes don't apply
     - Do not send
   - To add additional text to any notifications that will be sent, enter that text in the **Please type in additional information to be added to Catalog Update Notification** field.
9. Click **Finish**.

Assigning Distribution Groups

1. To assign a distribution group, select the group from the **Available Distribution Groups** list and click **Assign.**
2. To remove an assigned distribution group, select the group from the **Assigned Distribution Groups** list and click **Remove**.

Resources

A list of all resources in levels that are assigned to the logged in Administrator is displayed by default when the **Resources** category is selected. To limit the resources to a specific level, select the level in the hierarchy. Click a resources tile to view the resource details and resource management options.

Adding a new resource

Use **Add New Resource** to add a new resource to Infor Learning Management. After resources are added, they can be included in catalogs.

To add a new resource:

1. Select **Resources > Hierarchy Level > Add New Resource**.
2. Complete the **Resource Details** tab.
   a. Specify a Name and Description.
   b. Select the language used within the resource or the language of the intended audience for the resource in the **Resource language** item list.
   c. Select the the common field values that should be associated with this resource from the **Common Fields** item lists.
   d. To save your changes and add alternate text in another language, click Save & Add another language.
   e. Click **Next**.
3. Complete the **Select Resource** tab.
   a. To upload a file as a resource:
      1. Select the **Uploading File** radio button.
      2. Click **Browse** to locate and select the file.
      3. Click **Open**.
   b. To use an Infor Learning Management course as a resource:
      1. Select the **Existing Course** radio button.
      2. Click the course title.
   c. Click **Next**.
4. Complete the **Manage Levels** tab.
   a. To have sub levels of the levels you select automatically selected or de-selected, select the **Automatically check/uncheck sub-levels** check box.

b If the resource is a course and you wish to manage that course in the levels where it is assigned as a resource, select the **Manage level courses along with the resource** check box.

c Select a level name check box.

d Click **Next**.

5 Complete the **Manage User Rights** tab.

a Select the name of the level on which user rights are managed.

b Select how the resource should be made available to users on that level:

- To assign the resource to all users on the selected level and, if the resource was also added to sub-levels, to users on those sub-levels as well, select the **For all users at the current level and below** radio button.
- To assign the resource to users based on their user properties, select the **Based on user properties** radio button.
- To assign the resource only to users that are manually added, select the **For manually added only** radio button.

c Click **Save**. A confirmation message is displayed.

6 Click **OK**.

Viewing resources

You can view the details of a resource and its associated common fields.

To view resources:

1 Select **Resources > Hierarchy Level > Resource Name > More Options >** View Resource.

2 View the resource information.

Editing resources

Use Edit Resource to edit the details of the selected resource and its associated common fields.

To edit a resource:

1 Select **Resources > Hierarchy Level > Resource Name > More Options >** Edit Resource.

2 Specify a Name and Description.

3 To change the identifier for the language that the resource was created in or the language of the audience it is intended for, make a selection from the **Resource language** item list.

4 To change the values for the associated common fields, select or enter the values.

5 Click **Save**.

Removing resources

Use Remove Resource to remove a resource from Infor Learning Management. How that removal is performed, however, depends upon the type of resource being removed.

- File Type: Resources of type File are deleted from ILM when removed. This is a permanent deletion that cannot be undone through ILM. To restore resources of this type you will need a copy of the resource stored elsewhere that can be used to recreate the resource.
- Course Type: Resources of type Course are not deleted when removed. Instead, their classification as a resource is removed and any users or levels assigned to them as a resource are removed. The course still exists within ILM and all levels, users, and curricula that were associated with the course through non-resource options will still be associated with the course.

Once a resource of type File is removed it cannot be recovered through ILM. To restore resources of this type you will need a copy of the file that was stored outside of ILM.

To remove a resource:

1. Select **Resources > Hierarchy Level > Resource Name > More Options >** Remove Resource.
2. A confirmation dialog is displayed. Click **Yes** to delete the resource or **No** to cancel.

Managing levels

Use Manage Levels to manage the levels to which a resource is assigned. Managing level courses along with the resource is only available on a Hierarchy Level 2.

To manage levels:

1. Select **Resources > Hierarchy Level > Resource Name > More Options >** Manage Levels.
2. To have sub levels of the levels you select automatically selected or de-selected, select the **Automatically check/uncheck sub-levels** check box.
3. If the resource is a course and you wish to manage that course in the levels where it is assigned as a resource, select the **Manage level courses along with the resource** check box.
4. Select the level check box to assign the resource.
5. Click **Save**.

Assigning users

Use Assign Users to manage the users to which a resource is assigned. The resource is displayed in the Infor Learning Management Portal under **My resources** for users that are assigned the resource. From there, the user can add the resource to their favorites.

To assign users:

1. Select **Resources > Hierarchy Level > Resource Name > More Options >** Assign Users.

2 To assign the resource to users:
   a To filter the list of users displayed:
      1 Click Add criteria.
      2 Specify the settings for the criteria.
      3 Click the **Search** icon.
   b Select the check box for the users to which the resource should be assigned.
   c Click **Assign**.

3 To remove the resource from users:
   a To filter the list of users displayed:
      1 Click Add criteria.
      2 Specify the settings for the criteria.
      3 Click the **Search** icon.
   b Select the check box for the users from which the resource should be removed.
   c Click **Remove**.

Managing user rights

Use Manage User Rights to manage how resources are assigned to users in Infor Learning Management. The selected users will be able to search for these in the Infor Learning Management Portal under **Resources**, but they need to mark the resource as their favorite to have it displayed on their **Resources** page.

To manage user rights:

1. Select **Resources > Hierarchy Level > Resource Name > More Options >** Manage User Rights.
2. Select the name of the level on which user rights are managed.
3. Select how the resource should be made available to users on that level:
   - To make the resource available to all users on the selected level and, if the resource was also added to sub-levels, to users on those sub-levels as well, select the **For all users at the current level and below** radio button.
   - To make the resource available to users based on their user properties, select the **Based on user properties** radio button.
   - To make the resource available only to users that are manually added, select the **For manually added only** radio button.
4. Click **Save**.

Managing catalogs

Use Manage Catalogs to manage the catalogs to which a resource is assigned.

To manage catalogs:

1. Select **Resources > Hierarchy Level > Resource Name > More Options >** Manage Catalogs.
2. To assign the resource to catalogs:
   a. To filter the list of catalogs displayed:
      1. Click Add criteria.
      2. Specify the settings for the criteria.
      3. Click the **Search** icon.
   b. Select the check box for the catalogs that the resource should be assigned to.
   c. Click **Assign**.
3. To remove the resource from users:
   a. To filter the list of users displayed:
      1. Click Add criteria.
      2. Specify the settings for the criteria.
      3. Click the **Search** icon.
   b. Select the check box for the catalogs that the resource should be assigned to.
   c. Click **Remove**.

Certification

A list of all certification programs in levels that are assigned to the logged in Administrator is displayed by default when the **Certification** category is selected. To limit the certification programs to a specific level, select the level in the hierarchy. Click a program tile to view the program details and certification program management options.

Adding a basic certification program

Use **Add New Certification Program** to create a new certification program. This option is displayed differently depending on whether or not your organization has the Advanced Certification Component enabled in Infor Learning Management. The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

If your organization has the Advanced Certification Component enabled, please see Adding an advanced certification on page 177. Otherwise, please continue.

To add a basic certification program:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Add New Certification Program**.
2. Specify the name of the certification.
3. Specify this information:

   Program Code
   Specify a short code by which to identify the certification program,

4. To make the certification program immediately active when it is created, select the **Active** check box.
5. To indicate that the certification program is associated with external training instead of an Infor Learning Management course or curriculum, select the **External Certification Program** check box.
6. Select a certification document from the **Associate Certificate Document** item list.
7. Specify an objective, description, and any program notes for the certification program in the fields.
8. Specify this information:

   Organization
   Specify the organization name as it should appear on the certificate document.

Body
Specify text for the body of the certification document.

Signed by
Specify the name of the individual signing the certification document.

Signed by Title
Specify the title of the person signing the certification document

9. To allow changes to be made to the certification document in other Hierarchy levels, select the **Allow Certification Document to be Changed in Other Levels** check box.
10. To allow changes to be made to the certification program in other Hierarchy levels, select the **Allow requirements to be changed in levels other than the management level** check box.
11. To have Infor Learning Management send reminders to users prior to the expiration of the certificate, specify the number of days prior to expiration that the reminders should be sent in the First Reminder, Second Reminder, and Third Reminder fields.

    While reminders are not required, if you do use them make sure that the number of days decreases from First Reminder to Third Reminder so that they will be sent in order.
12. Click **Next**.
13. Set the certification completion deadline.
    a. To restrict users so that they can only complete the certification between certain dates, select the **Between** radio button and specify the start and end dates.
    b. To require users to complete the certification program within a specific period of time after enrolling in it, select the**after enrollment** radio button, then specify the period length from the item list.
14. Set the certification expiration.
15. To archive a user's scores from the courses they complete during their certification and to reset the questions so they may renew their certification, select the**Enable Maintenance for certification program** check box and specify the number of days prior to certification expiration that the maintenance period should start.
16. Click **Next**.
17. Specify the number of credits required to pass the certification program or select the **User must complete all requirements that are present in the current ILM Level** check box.
18. To add a new requirement to the certification program:
    a. Select whether it is a course or curriculum requirement from the **Add new** item list.
    b. Click **Add**.
    c. Select the course or curriculum from the item list.
    d. Specify the number of awarded credits.
    e. Click **Apply**. A confirmation dialog box is displayed. Click **OK**.
19. To edit an existing requirement:
    a. Specify the credits awarded for successful completion of a requirement.
    b. Click the requirement name and specify the course or curriculum and credits.
    c. Click **Apply**.
    d. To remove a requirement from the certification program, click the Delete Requirement icon. A confirmation dialog box is displayed. Click **OK**.

20 To change the order of listed requirements, click within the blank space on a requirement and then drag and drop it into a new position within the list.

21 Click **Finish**.

If your organization has the Advanced Certification Component enabled, see Adding an advanced certification on page 177.

Adding an advanced certification

Use **Add New Certification Program** to create a new certification program. This option is displayed differently depending on whether or not your organization has the Advanced Certification Component enabled. The Advanced Certification Component is an optional module for Infor Learning Management.

To add an advanced certification:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Add New Certification Program**.
2. Specify the name and description of the program.
3. Proceed to the section that corresponds with the type of certification program you are creating.

Adding a certification program with requirements

A course or curriculum that has been linked to a certification program is considered a requirement of that certification program.

To add a certification program with requirements:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Add New Certification Program**.
2. Select the **This certification program will only contain one or more requirements that the user must complete to earn a certification** radio button.
3. Click **Next**.
4. Verify the Certification Program Name.
5. To change the information that has been entered, click **Previous** to return to the first screen.
6. Click **Finish** to save the certification program or click **Cancel** to discard your settings and start over.

Adding a certification program with requirement groups

Requirement groups are available only with the Infor Advanced Certification Add-on. Advanced Certifications require users to complete multiple levels of certification that may extend over a broader period. For example, a service technician could complete an entry-level certification and still need to take expert- and master-level training to satisfy an advanced certification.

Each level may have different requirements with regard to deadlines, maintaining compliance, and recertification-for example, a basic certification may never expire but an expert or master level might require annual recertification.

To add a certification program with requirement groups:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Add New Certification Program**.
2. Select the **This certification program will only contain requirement groups that the user must complete to earn certification** radio button.
3. Click **Next** to proceed to the next step.
4. Designate one or more Certification Program Requirement Groups:
   a. Specify a name for the requirement group.
   b. Click <u>Add Requirement Group</u>.
5. To remove a requirement group from the certification program, click <u>Remove</u>.
6. To change information in the previous step click **Previous**.
7. Click **Finish** to save the certification program or click **Cancel** to start over from the beginning.

Adding certification program levels

Advanced Certifications require users to complete multiple levels of certification that may extend over a broader period. For example, a service technician could complete an entry-level certification and still need to take expert- and master-level training to satisfy an advanced certification.

Each level may have different requirements with regard to deadlines, maintaining compliance, and recertification-for example, a basic certification may never expire but an expert or master level might require annual recertification.

To add certification program levels:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Add New Certification Program**.
2. Select the **This certification program will contain multiple levels with each level having its own completion criteria** radio button.
3. Click **Next**.
4. To create a new level and add it to the certification program:
   a. Specify the name of the level.
   b. Select the type of program level that you would like to create from the item list.
   c. Click <u>Add Level</u>.
5. To remove a level from the certification program, click **Remove**.
6. Click **Next** when you are ready to proceed to the next step, click **Previous** to return to the previous step, or click **Cancel** to start over.

7 If the **Program Level with Requirement Groups** item list option was selected for any of the levels created you can now add one or more requirement groups to that level:
8 Specify the Certification Program Requirement Group Name.
9 Click Add Requirement Group.
10 To remove a requirement group from the level, click Remove.
11 Click **Next** when you are ready to proceed to the final step, click **Previous** to return to the previous step, or click **Cancel** to start over.
12 Verify the certification program settings prior to creating it. To make changes to the certification program, click **Previous** to go back to the previous steps or click **Cancel** to start over.
13 Click **Finish**.

Initiating distribution for all certification programs

Use **Certification Programs Distribution** to manually start the distribution process for all of your certification programs. While distribution of certification programs is normally an automated process, you can manually initiate distribution for all certification programs via this option.

To initiate distribution for all certification programs:

1 Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification Programs Distribution**.
2 Click **Run** to begin the distribution process for all certification programs.
3 To view the log of past distribution process activities, click Distribution Process Log. A confirmation message is displayed. Click **OK**.
4 Select the destination to save the file.
5 Navigate to the saved file on your computer and open it to view the log file.

Adding existing certification programs on the current level

Use **Add existing certification programs on the current level** to move existing Certification Programs from parent hierarchy levels to your current hierarchy level. A list of Certification Programs is displayed. If the program has a code it is displayed before the name in the list.

To add an existing certification program to the current level:

1 Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Add existing certification programs on the current level**.
2 Search for the certification program.
3 Select the check box for the program.

4 To automatically move all linked requirements for each program, select the **Add all the requirements of selected programs by default** check box. This is selected by default.

5 To automatically push the programs to all levels below the selected level, select the **Add certification program to all levels below selected level** check box. This is selected by default.

6 Click **Add**.

Viewing certification programs

Use View Program to view the details of a certification program.

To view a certification program:

1 Select **Certification Programs > Manage Certification Programs > Hierarchy Level > More Options >** View Program.

2 View the information such as the name, associated certificate document, and information on associated levels, requirement groups, and requirements.

Editing a basic certification program

This topic applies to the Basic Certification Component only. If you have the Advanced Certification Component enabled, please see Editing an advanced certification program on page 181. The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use Edit Program to edit information and properties of the certification program. You can change information such as the certification program name, code, objective, description, or notes. You can also use this option to set the program as active or inactive.

You can specify information that is displayed on the certificate document, such as the organization, body, signed by, and signed by title. You can also specify whether the program or document can be changed in other levels and when reminders will be sent prior to certificate expiration.

To edit a basic certification program:

1 Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > More Options >** Edit Program.

2 Specify this information:

Certification Program Name
Specify the certification program name.

Program Code
Specify a code for the certification program.

3 Select a certificate document from the **Associate Certificate Document** item list.

4 Specify an objective, description, and any program notes for the certification program.

5 Specify this information:

Organization
Specify the organization that will be displayed on the certificate document.

Body
Specify the body text of the certificate document.

Signed by
Specify the name of the person signing the certification document.

Signed by Title
Specify the title of the person signing the certification document.

6 Click **Apply**. A confirmation message is displayed.

7 Click **OK**.

8 To make changes to the rules governing the certification, click **Certification Rules**.

9 Use the Certification Completion Deadline setting to specify when a user must complete the certification process.

10 Use the Certification Expiration setting to specify when a user's certification will expire.

11 Use the Certification Maintenance setting to reset a user's courses so that the user may complete them again to renew their certification prior to its expiration. This option is only available for certifications that will expire based on the settings in the Certification Expiration section.

   a Select the **Enable Maintenance** check box to give users a maintenance period in which to renew their certification.

   b Specify the number of days prior to expiration that the maintenance will begin in the field.

12 Select **Apply certification rule changes to existing user enrollments** to apply changes to existing enrollments.

- If an enrollment is in the "Started" state, the completion deadline date (if changed) is updated
- If an enrollment is in the "Completed" state, the expiration and maintenance start dates (if changed) are updated
- If an enrollment is in the "Maintenance" state, the expiration date (if changed) is updated
- No changes are made if the enrollment is in any other state (Expired, Recertification)

13 Click **Apply**. A confirmation message is displayed.

14 Click **OK**.

Editing an advanced certification program

This topic applies to the Advanced Certification Component only. If you do not have the Advanced Certification Component enabled, please see Editing a basic certification program on page 180. The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use Edit Program to edit information and properties of the certification program. You can change information such as the certification program name, code, objective, description, or notes. You can also use this option to set the program as active or inactive.

You can specify information that will be displayed on the certificate document, such as the organization, body, signed by, and signed by title. You can also specify whether the program or document can be changed in other levels and when reminders will be sent prior to certificate expiration.

To edit an advanced certification program:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > More Options >** Edit Program.
2. Specify this information:

   Certification Program Name
   Specify the certification program name.

   Program Code
   Specify a code for the certification program.

3. To allow users to view alternate certification program requirements other than the ones in which they are currently enrolled, select the **Display requirements users are not enrolled into** check box.
4. Select a certificate document from the **Associate Certificate Document** item list.
5. Specify an objective, description, and any program notes for the certification program.
6. Specify this information:

   Organization
   Specify the organization that will be displayed on the certificate document.

   Body
   Specify the body text of the certificate document.

   Signed by
   Specify the name of the person signing the certification document.

   Signed by Title
   Specify the title of the person signing the certification document.

7. Click **Apply**.

Modifying a basic program structure

This topic applies to the Basic Certification Component only. If you have the Advanced Certification Component enabled, please see Modifying an advanced program structure on page 183. The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use Modify Program Structure to edit settings for a certification program. Administrators can change the total number of credits required to pass the certification program or add new course or curriculum requirements. In addition, administrators can edit existing requirements of the certification program by changing the course or curricula associated with the requirement, changing the number of credits the requirement awards for successful completion, editing whether the requirement is mandatory, or deleting the requirement from the certification program.

To modify a basic program structure:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > More Options >** Modify Program Structure.
2. Specify the number of credits required for completion.
3. Click **Apply**. An confirmation message is displayed.
4. Click **OK**.
5. To add a new requirement to the certification program:
   a. Select the requirement type, course or curriculum, from the **Add New** item list.
   b. Click **Add**.
   c. Select the course or curriculum from the item list.
   d. Specify the number of credits that will be awarded for successful completion.
   e. Click **Apply**. A confirmation message is displayed.
   f. Click **OK**.
6. To edit an existing requirement:
   a. Click the name of the requirement to open it in an editing window.
   b. Specify the number of credits that will be awarded for successful completion.
   c. Click **Apply** to save changes or click **Cancel** to discard them.
   d. Close the window.
   e. To remove a requirement, click the **Delete** icon.
   f. To change the order of listed requirements, click and drag.

Modifying an advanced program structure

This topic applies to the Advanced Certification Component only. If you do not have the Advanced Certification Component enabled, see Modifying a basic program structure on page 182. The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use Modify Program Structure to edit settings for a certification program. Administrators can change the total number of credits required to pass the certification program or add new course or curriculum requirements. In addition, administrators can edit existing requirements of the certification program by changing the course or curricula associated with the requirement, changing the number of credits the requirement awards for successful completion, editing whether the requirement is mandatory, or deleting the requirement from the certification program.

Depending on the configuration of the certification program, some of the options will be available to you. Please note that there may be differences within an option based on where it appears in the structure of the certification program.

To modify an advanced program structure:

1 Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > More Options >** Modify Program Structure.

2 Click the Manage Certification Rules / Edit Certification Program Level icon to open this process in a new window in the Content Area.

   a If **Certification Program Level Properties** and **Certification Rules** are displayed, click **Certification Program Level Properties**.

   b Specify this information:

      Program Level Name
      Specify the name of the certification program.

      Program Level Code
      Specify the code associated with the program level.

   c Select the certificate document to associated with the certification from the **Associate Certificate Document** item list.

   d Specify this information:

      Objective
      Specify the objective of the certification program.

      Program Level Description
      Specify the description of the certification program level.

      Program Level Notes
      Specify the notes associated with the certification program level.

   e Select a certification type and click **Apply**.

   f If **Certification Program Level Properties** and **Certification Rules** is displayed at the top, click **Certification Rules**.

   g Select a certification type.

   h Set the **Certification Completion Deadline** for a basic certification or set the reset date for annual certifications.

3 Click **Apply**.

4 Click the **Manage Requirements** icon to open this process in a new window in the Content Area.

   a Specify the number of credits required to complete the certification.

   b Select **Course** or **Curriculum** from the **Add new** item list and select the course or curriculum name.

   c Specify the number of credits that will be earned upon completion.

   d Click **Apply**.

   e Drag and drop to re-order the requirements.

   f To manage requirement equivalents, click the**Manage Requirement Equivalents** icon.

1. Select that the user must complete all requirement levels or specify the number of credits that must be completed.
2. To add an equivalent to the requirement, select **Course** or **Curriculum** from the **Add new** item list and click **Add**.
3. Select the course or curriculum from the item list and specify the credits awarded for successful completion.
4. Click **Apply** to save your changes or **Cancel** to discard them.
5. To manage an existing requirement, click the name of the equivalent requirement in the **Equivalent Name** item list and select the course or curriculum.
6. Click **Apply** to save your changes or **Cancel** to discard them.
7. Click the **Delete** icon to remove an equivalent requirement.

g Click the **Delete** icon to remove a requirement.

5 Click the **Manage Certification Program Level** icon to open this process in a new window.

a Drag and drop levels to reorder them.

b To remove a level, click the **Delete** icon.

6 Click the **Manage Requirement Groups** icon to open this process in a new window.

a Specify the number of credits required to pass the certification program.

b Click the**Add New Requirement Groups** icon to add a requirement group.

c Specify the number of credits awarded for completion of a requirement group.

d To remove a requirement group, click the **Delete** icon.

e Click **Apply** to save your changes.

7 Click the **Use Multiple Requirement Groups** icon to open this process in a new window.

Caution:

Once you add requirement groups to a certification program you will not be able to remove all of them from it.

This is a permanent change to the certification program and, once completed, there will always be at least one requirement group within the certification program.

a Specify the name of the new requirement group and the number of credits that will be earned after successful completion.

b Click **Add**.

8 Click the **Add New Requirement Group** icon to open this process in a new window.

a Specify the name of the new requirement group and the number of credits that will be earned after successful completion.

b Click **Add**.

9 Click the **Use Multiple Levels** icon to open this process in a new window.

Caution:

Once you add levels to a certification program you will not be able to remove all of them from it.

This is a permanent change to the certification program and, once completed, there will always be at least one level within the certification program.

a Specify the name of the level.

   b. Select **Requirements** or **Requirement Groups** from the **with** item list.
   c. Click **Add**.

10. Click the **Add Certification Program Level** icon to open this process in a new window.
    a. Specify the name of the new level.
    b. Select **Requirements** or **Requirement Groups** from the **with** item list.
    c. Click **Add**.
11. To delete an item, click the **Delete** icon.
12. Click **OK** to delete the item or **Cancel** to abort the process.

Managing advanced program documents

This topic applies to the Advanced Certification Component only. The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use **Manage Program Documents** to view or change the certification document currently assigned to the certification program.

To manage program documents:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > More Options >** <u>Modify Program Documents</u>.
2. To view the currently associated certification document, click <u>Preview</u>. The document is displayed in a new window.
3. Click <u>Change document</u> to change the currently associated certification document.
   a. To assign the certificate document from the parent level to the current certification program, select the **Assign Parent Document** radio button. If the parent level does not have a certification document that can be applied here the option will be unavailable.
   b. Select the radio button for the certification document.
   c. Click **Apply** to save the changes.

Managing levels

Use <u>Manage Levels</u> to add or remove a certification program from levels within the Hierarchy and to view the management level of a certification program.

To manage levels:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > More Options >** <u>Manage Levels</u>.
2. To add the certification program to a specific level, select the level check box.

3 To add the certification program to all levels below a specific level:
   a Click the level name.
   b Click the **Add certification program to all levels below selected level** radio button.
   c Click **Apply**.
4 To remove the certification program from a specific level, clear the level check box.
5 To remove the certification program from all levels below a specific level:
   a Click the level name.
   b Click the **Remove certification program from all levels below selected level** radio button.
   c Click **Apply**.
6 To view the management level for a certification program, click **Management Level**.
7 To change the management level for a certification program, select the check box for the new management level.

Configuring notifications

Use Notifications Configuration to select which notifications will be applied to the certification program as well as the Hierarchy levels they will affect.

To configure notifications:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > More Options >** Notifications Configuration.
2. To set the Hierarchy level to which you will be assigning notifications, click the level name.
3. Select the check box for the notifications you will assign to the program.
4. To change the settings or the text of the notification, click Edit.
5. Select the radio button to indicate whether the notifications will be applied to the current level or all levels below the current level.
6. Click **Apply**.

Modifying basic program enrollment rules

This topic applies to the Basic Certification Component only. If you have the Advanced Certification Component enabled, please see Modifying advanced program enrollment rules on page 188. The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use Modify Enrollment Rules to configure how users will be added to the certification program. Users can be added by level or by meeting specific properties or they can be allowed to self enroll in the certification program.

To modify basic program rules:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > More Options >** Modify Enrollment Rules.
2. To enroll users in a certification program based on Hierarchy level:
   a. Select the level in the tree view.
   b. Select the Enroll all Users in the Selected Level radio button.
   c. Click **Apply**.
3. To enroll users in a certification program based on specified properties:
   a. Select the **Enable Self Registration for this Program** check box.
   b. Click **Apply**.

Modifying advanced program enrollment rules

This topic applies to the Advanced Certification Component only. If you do not have the Advanced Certification Component enabled, please see Modifying a basic program structure on page 182 . The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use Modify Enrollment Rules to configure how users will be added to the certification program. Users can be added by level or by meeting specific properties or they can be enabled to self-enroll in the certification program.

To modify advanced program enrollment rules:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > More Options >** Modify Enrollment Rules.
2. To enroll users in a certification program based on Hierarchy level, click the level and select the **Enroll all Users in the Selected Level** check box. Both the **Enable Self Registration for this Program** and the **Enable Automatic Distribution** check boxes are disabled.
3. To allow users to register themselves for this certification program, select the **Enable Self Registration for this Program** check box.
4. The **Enable Self Registration for this Program** check box will only be displayed if you either have an L2 or below selected in the Hierarchy or if you have selected an L2 or below in the tree view within the option screen. Additionally, this option will only be enabled for use if the Enroll all Users in the Selected Level check box is not checked.
5. To enable Infor Learning Management to perform automatic distribution for this certification program to users, select the **Enable Automatic Distribution** check box. The**Enable Automatic Distribution** check box will only be displayed if you either have an L2 or below selected in the Hierarchy or if you have selected an L2 or below in the tree view within the option screen. Additionally, this option will only be enabled for use if the **Enroll all Users in the Selected Level** check box is not selected.
6. Click **Apply**.

Copying a program

Use Copy Program to create a duplicate of an existing certification program. The new certification program is an exact copy of the one it was copied from, but it has a different name.

To copy a program:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > More Options >** Copy Program.
2. Select the level to which the certification program will be copied.
3. Specify a name for the new certification program.
4. If the certification program contains requirement groups or multiple levels with their own completion criteria:
   - To copy the entire certification program, select the **Copy Whole Certification Program** check box.
   - To copy only the desired groups or levels, select the desired items in the Level Name and/or Requirement Group columns and specify the new names for the copies of these items in the New Level Name and/or New Requirement Group Name columns.
5. Click **Next** and verify your selections.
6. To make changes, click **Previous** to go back to the previous screen; to complete the process, click **Finish** to make the copy.

Managing distribution rules

Use Manage Distribution Rules to specify how the certification program will be distributed if it has been set for automatic distribution. Certification programs that are set for automatic distribution will be distributed during the daily batch job or when the process is run manually for a certification program by clicking **Run** on this screen or through the Initiating distribution for all certification programs on page 179 option.

To manage distribution rules:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > More Options >** Manage Distribution Rules.
2. To manually run the distribution process for this certification program using the existing distribution rules, click **Run**.
3. To add a new distribution rule to the certification program, click **Add New**. A blank, unnamed rule is created that can be configured.
4. Specify a name for the rule.
5. To add a condition to the rule that will be used to select and add users to the curriculum:
   a. Click the **Add Line** icon to create a new condition line.
   b. In the first item list, select the data field that will be evaluated to see if the user meets the selection criteria.
   c. In the second item list, select the type of comparison that will be used to evaluate the condition.

d In the field, specify the specific value that the data field should be evaluated against using the above condition to determine whether the user is a match for the rule.

Note: If needed, use multiple condition lines to match the users more precisely. For example, you can match the users by the country, however, you may not want to include all users from that country. You can create two condition lines and set one to match the country, and another to match a specific city and the users who live in that country and city will be included. You can create rules based on the AND logic and OR logic.

6. To remove a distribution rule, click the **Remove** icon.
7. Select the desired Distribution Process (only one option can be selected):

Option	Description
Keep Existing Users	Previously associated users in the certificate program are kept if the rules change
Remove users from associated requirements	Previously associated users from the curriculum and courses are removed if the rules change

8. To obtain a log of the previous distribution activities for this certification program, click Distribution Process Log and save the text file to your computer.
9. Click **Save**.

Assigning Distribution Groups

1. To assign a distribution group, select the group from the **Available Distribution Groups** list and click **Assign.**
2. To remove an assigned distribution group, select the group from the **Assigned Distribution Groups** list and click **Remove**.

Viewing program users

Use View Program Users to view the users associated with a certification program and their progress toward completion of the certification program.

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > Manage Users >** View Program Users.
2. Use the Search options to find and select the desired user or click **Show All** to view all users associated with the certification program.
3. To view the details of a specific user's progress within the certification program, click the user's name.

Adding program users

Use Add Program Users to add users to an existing certification program.

To add program users:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > Manage Users >** Add Program Users.
2. Use the Search options to find and select the desired user or click **Show All** to display all available users that can be added to the level.
3. Select the check boxes for the users.
4. Click **Add**.

Removing program users

Use Remove Program Users to remove users from a certification program.

To remove program users:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > Manage Users >** Remove Program Users.
2. Use the Search options to find the desired users or click **Show All** to display all users in the certification program.
3. Select the check boxes for the users.
4. Click **Remove**.

Resetting program users

Use Reset Program Users to reset the progress of one or more users in a certification program.

To reset program users

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > Manage Users >** Reset Program Users.
2. Use the Search options to find the desired users or click **Show All** to display all users in the certification program.
3. Select the check boxes for the users.
4. Click **Reset**.

Printing program certificates

Use Print Program Certificates to print completion certificates for one or more users in a certification program.

To print program certificates:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > Manage Users >** Print Program Certificates.
2. Use the Search options to find the desired users or click **Show All** to display all users in the certification program.
3. Select the check boxes for the users.
4. Click **Print**.

Managing completion of certification programs

Use the **Completion Management** to manually grant or revoke completion for certification program requirements.

To manage completion of certification programs:

1. Select **Certification Programs > Manage Certification Programs > Hierarchy Level > Certification program > Manage Users > Completion Management**.
2. To locate one or more users in the current certification program, use the **Search** field.
3. To locate a specific program structure, select it from the **Filter Program Structure** list.
4. Click on the user row to expand it and display certification program details.
5. To change the completion status, change the selection in the **Status** item list to **Complete** or **Incomplete**.
6. To change the completion start date, edit the date in the **Completion Start Date** column.
7. To change the completion deadline date, edit the date in the **Completion Deadline Date** column.
8. To view the user's activity history for the certification program, click View History.
9. Click **Apply**.

Viewing certification documents

Use View Certification Document to view or download certification documents from the selected level. Default certification documents are indicated by an asterisk next to their name.

To view a certification document:

1. Select **Certification Programs > Manage Certificate Documents > Hierarchy Level > Certificate name > More Options >** View Certification Document.

2 To see a preview of the certification document, click Preview.
3 To download a copy of the certification document, click Download.
4 To download a sample certification document to use as a basis for creating a custom certification document, click Download Sample Certificate Document.

   After you click Download Sample Certificate Document a sample certificate document is downloaded so that you can customize a certificate's contents and upload it as a new certificate document using Adding a certification document on page 193 or Editing a certification document on page 194 options. The .ZIP file contains an HTML file, called certification.html, and associated images.

Adding a certification document

Use Add Certification Document to upload your own customized certification documents. You can download a sample certificate document to use as a base for any custom certificate documents you wish to upload and select which certificate document will be marked as the default for the selected level.

The .ZIP file you upload must contain your certification document in HTML format and its associated images.

To add a certification document:

1 Select **Certification Programs > Manage Certificate Documents > Hierarchy Level > More Options >** Add Certification Document.
2 To download a sample certification document to use as a basis for creating a custom certification document, click Download Sample Certificate Document.

   After you click Download Sample Certificate Document a sample certificate document is downloaded so that you can customize a certificate's contents and upload it as a new certificate document using Adding a certification document on page 193 or Editing a certification document on page 194 options. The .ZIP file contains an HTML file, called certification.html, and associated images.

3 Specify a name for the document.
4 To make the certification document the default on the selected level, select the **Certificate Document Default** check box.

   You can mark any certificate document as the default on the selected level. When you mark a certificate document as the default, the previous default certificate document will no longer will be marked as the default. You can not delete a certificate document that is marked as the default on the selected level.

5 Click **Browse** to locate the desired certificate .ZIP file on your computer.
6 Click **Upload**.

Editing a certification document

Certification document attributes can be changed using Edit Certification Document. You can change the certificate document title and its status as the default document.

To edit a certification document:

1. Select **Certification Programs > Manage Certificate Documents > Hierarchy Level > Certificate name > More Options >** Edit Certification Document.
2. To see a preview of the certification document, click Preview.
3. To download a copy of the certification document, click Download.
4. To download a sample certification document to use as a basis for creating a custom certification document, click Download Sample Certificate Document.

   After you click Download Sample Certificate Document a sample certificate document is downloaded so that you can customize a certificate's contents and upload it as a new certificate document using Adding a certification document on page 193 or Editing a certification document on page 194 options. The .zip file contains an HTML file, called certification, html, and associated images.

   Note: Do not change any of the file names.
5. Specify the title of the certification document.
6. To mark the certification document as the default for the selected level, select the **Certificate Document Default** check box.
7. To change the certificate document template, click **Browse** to locate a .ZIP file to upload from your computer.
8. Click **Edit**.

Customizing the certification document template

You can customize the certification document template to change the way the certification looks, and add additional images.

To customize the certification document template:

1. Open **certificate.html** in Notepad or a HTML editor.
2. Find any entries you need to customize:

   You can either change the file names in the **certificate.html** file (recommended) or replace the images in the **Images** folder with new images that have the same name.

Entry	Description
`##IMAGESPATH##/BG.gif`	Background image
`##IMAGESPATH##/topLeftCorner.gif`	Default top left corner pattern
`##IMAGESPATH##/topBackground.gif`	Default top pattern
`##IMAGESPATH##/topRightCorner.gif`	Default top right corner pattern
`##IMAGESPATH##/leftBackground.gif`	Default left pattern
`##IMAGESPATH##/rightBackground.gif`	Default right pattern

Entry	Description
##IMAGESPATH##/bottomLeftCorner.gif	Default bottom left corner pattern
##IMAGESPATH##/bottomBackground.gif	Default bottom pattern
##IMAGESPATH##/bottomRightCorner.gif	Default bottom right corner pattern

You can replace any of the system entries with images. For example, to replace the printed name of the person signing certificate with an image of an actual signature, find `<b>##SIGNED_BY##</b>` and replace it with `<img src="##IMAGESPATH##/signature.gif">`Add the signature image to the Images folder. Make sure the name of the signature file is the same name you use in the **certificate.html** code.

3 Move, delete, or change any of the tokens. A token is a code name for various sections of the certificate and is surrounded by "##" at the beginning and the end.

Note: Do not change any of the token code names.

TOKENS	DESCRIPTION
##CERTIFICATE_NAME##	Displays the name of the certificate. This is a dynamically populated token that is set under Certificate Programs -- Edit.
##USER_NAME##	Displays the first and last name of the user who is being issued the certification. This token cannot be modified.
##ORGANIZATION##	Displays the name of the organization issuing the certificate. This is a dynamically populated token that is set under Certificate Programs -- Edit.
##CERTIFICATE_BODY##	Displays certificate body text. This is a dynamically populated token that is set under Certificate Programs -- Edit.
##DATE_COMPLETED##	Displays the date the certification program was completed by the user. This token cannot be modified.
##DATE_VALID_UNTIL##	Displays the date certificate is valid until. This token cannot be modified.
##SIGNED_BY##	Displays the name of the person who signed the certificate. This is a dynamically populated token that is set under Certificate Programs -- Edit.
##SIGNED_BY_TITLE##	Displays the title of the person who signed the certificate. This is a dynamically populated token that is set under Certificate Programs -- Edit.

Adding new images to certification document

You can add new images or replace the default images in the certification document to customize the way the certificate looks. You can either change the file names in the certificate.html file (recommended) or replace the images in the Images folder with new images that have the same name. See Editing a certification document on page 194 for additional steps that may be required.

To add new images to the template:

1 Copy and paste or drag and drop the new images to the **Images** folder.
2 Select **Move and Replace** or **Copy and Replace** for any images that you are replacing.

Removing a certification document

You can use the Remove Certification Document option to remove certification documents from the system.

Certification documents marked as the default for the selected level can not be deleted. If a certification document you wish to delete is set as default, you must mark a different certification document as default using Editing a certification document on page 194 or add a new certification document and mark it as the default using the Adding a certification document on page 193.

To remove a certification document:

1 Select **Certification Programs > Manage Certificate Documents > Hierarchy Level > Certificate name > More Options >** Remove Certification Document.
2 To visually confirm which certification document you are about to delete, click Preview Certificate Document.
3 To download a sample certification document to use as a basis for creating a custom certification document, click Download Sample Certificate Document.

   After you click Download Sample Certificate Document a sample certificate document is downloaded so that you can customize a certificate's contents and upload it as a new certificate document using Adding a certification document on page 193 or Editing a certification document on page 194 options. The .ZIP file contains an HTML file, called certification.html, and associated images.
4 Click **Delete**.

Collaboration

A list of all collaboration spaces in levels that are assigned to the logged in Administrator is displayed by default when the **Collaboration** category is selected. To limit the spaces to a specific level, select the level in the hierarchy. Click a space tile to view the details and space management options.

Viewing a collaboration space

Use View Space to view an existing collaboration space and its properties.

To view a collaboration space:

1. Select **Collaboration > Manage Spaces > Space name > Manage >** View Space.
2. View the information.

Managing space settings

Use Manage Space Settings to configure the availability of activities such as blogs, file-sharing, task managers and more in your collaboration spaces. Space settings can also be modified from portal by users with the appropriate permissions. You can modify settings for these options:

- Articles
- Blogs
- Events
- File Sharing
- Forums
- Photo Sharing
- Video Sharing
- Wikis
- Task Managers

To manage space settings:

1. Select **Collaboration > Manage Spaces > Space name > Manage >** Manage Space Settings.
2. To edit the settings for any of the available options select the **Yes** or **No** radio button.

3 Click **Update**.

Editing a collaboration space

You can use Edit Space to edit an existing collaboration space and its properties, however, it is recommended to modify the spaces from the portal.

To edit a collaboration space:

1. Select **Collaboration > Manage Spaces > Space name > Manage >** Edit Space.
2. Specify a Space title and Space description.
3. Specify a start and end date or leave the fields blank to have the space be always available.
4. To make the space active, select the **Active** check box.
5. Click **Save**.

Managing ILM Administrators

Use Manage ILM Administrators to assign administrators to a collaboration space. The assigned administrators are able to perform administrative functions, such as distribution or editing, for that space. By default, all system administrators are assigned to all collaboration spaces.

To manage ILM administrators:

1. Select **Collaboration > Manage Spaces > Space name > Manage >** Manage ILM Administrators.
2. To add an administrator to the space:
   a. Search for the system administrator.
   b. Select their check box.
   c. Click **Assign**.
3. To remove an administrator:
   a. Search for the system administrator.
   b. Select their check box.
   c. Click **Remove**.

Associating a space with a course

Use Associate Courses to associate courses with a collaboration space so that any users who are enrolled in those courses will have access to the space. In this way, you can form communities around a particular course or courses.

To associate a space with a course:

1 Select **Collaboration > Manage Spaces > Space name > Associations >** Associate Courses.
2 To add a course to the space:
   a Search for and select the course for the Available Courses column.
   b Select the check box for the course.
   c Click **Add**.
3 To remove a course:
   a Search for and select the course for the Existing Courses column.
   b Select the check box for the course.
   c Click **Remove**.

Associating a space with a curriculum

Use Associate Curricula to associate curricula with a collaboration space so that any users who are enrolled in those curricula will have access to the space. In this way, you can form communities around particular curricula.

To associate curricula with a collaboration space:

1 Select **Collaboration > Manage Spaces > Space name > Associations >** Associate Curricula.
2 To add a curriculum to the space:
   a Search for and select the course for the Available Curricula column.
   b Select the check box for the curriculum.
   c Click **Add**.
3 To remove a curriculum:
   a Search for and select the course for the Existing Curricula column.
   b Select the check box for the curriculum.
   c Click **Remove**.

Associating a space with a curriculum schedule

Use Associate Curricula Schedules to associate curricula schedules with a collaboration space so that any users who are enrolled in those schedules will have access to the space. In this way, you can form communities around particular curriculum schedules.

To associate a space with a curriculum schedule:

1 Select **Collaboration > Manage Spaces > Space name > Associations >** Associate Curricula Schedules.
2 To add a curriculum schedule to the space:

   a Search for and select the course for the Available Curriculum Schedules column.
   b Select the check box for the curriculum schedule.
   c Click **Add**.

3. To remove a curriculum:
   a Search for and select the course for the Existing Curriculum Schedules column.
   b Select the check box for the curriculum schedule.
   c Click **Remove**.

Associating a space with a course event

Use Associate Course Events to associate course events with a collaboration space so that any users who are enrolled in those course events will have access to the space. In this way, you can form communities around particular course events.

To associate a space with a course event

1. Select **Collaboration > Manage Spaces > Space name > Associations >** Associate Course Events.
2. To add a course event to the space:
   a Search for and select the event for the Available Course Events column.
   b Select the check box for the course event.
   c Click **Add**.
3. To remove a course event:
   a Search for and select the event for the Existing Course Events column.
   b Select the check box for the course event.
   c Click **Remove**.

Associating a space with a catalog

Use Associate Catalogs to associate catalogs with a collaboration space so that any users who are enrolled in those catalogs will have access to the space. In this way, you can form communities around particular catalogs.

To associate a space with a catalog:

1. Select **Collaboration > Manage Spaces > Space name > Associations >** Associate Catalogs.
2. To add a catalog to the space:
   a Search for and select the catalog for the Available Catalogs column.
   b Select the check box for the catalog.
   c Click **Add**.

3 To remove a catalog:
   a Search for and select the catalog for the Existing Catalogs column.
   b Select the check box for the catalog.
   c Click **Remove**.

Associating a space with a hierarchy level

Use Associate Levels to associate levels with a collaboration space so that any users who exist on those levels will have access to the space. In this way, you can form communities around a particular level or levels.

To associate a space with a level:

1 Select **Collaboration > Manage Spaces > Space name > Associations >** Associate Levels.
2 To add or remove levels:
   a Select or clear the check box for the level.
   b Click **Save**.

Associating a space with a user

Use Manage User to associate specific users with a collaboration space so that those users will have access to the space. In this way, you can form communities around a particular group of users or add individual users to existing spaces associated with other objects in Infor Learning Management.

To associate a space with a user:

1 Select **Collaboration > Manage Spaces > Space name > Users >** Manage Users.
2 To add users to the space:
   a Search for and select the user in the Available Catalogs column.
   b Select the check box for the user.
   c Click **Assign**.
3 To remove users:
   a Search for and select the user in the Existing Catalogs column.
   b Select the check box for the user.
   c Click **Remove**.

Using space distribution rules

Use Distribution Rules to associate specific users with a collaboration space so that those users will have access to the space. In this way, you can form communities around a particular group of users or add individual users to existing spaces associated with other objects in Infor Learning Management.

To use space distribution rules:

1. Select **Hierarchy level 2 > Collaboration > Manage Spaces > Space name > Users >** Distribution Rules.
2. To add a new distribution rule:
   a. Click **Add New Rule**.
   b. Specify a **Distribution Rule Name**.
   c. Select a user attribute from the item list and select values from any subsequent item lists.
   d. To add additional user attributes, click the **+** icon.
   e. To remove an attribute, click the **X** icon.
   f. Click **Save**.
3. To remove a distribution rule, click the **X** icon.

Managing user roles for spaces

Use Manage Roles to assign specific roles to users in a collaboration space and determine what rights they will have inside that space. Roles include:

- Moderators - Moderators are members of the community who have the ability to edit and remove the content posted by other users in the community.
- Guests - Guests are non-members who may view activity in the community but not participate or contribute content.
- Members - Members are standard users who may participate in the community. They are limited to editing only the content they've submitted to the community themselves.
- Administrators - Administrators have the ability to configure all the settings for a collaboration space, including what options are available to other user roles.

Note: An expanded method of space role management is located at **Manage Collaboration > People > Roles**

To manage user roles for spaces:

1. Select **Collaboration > Manage Spaces > Space name > Users >** Manage Roles.
2. Click the user role in the User Role in Space column. Check boxes for the user roles are displayed.
3. Select or clear the check boxes to add or remove roles.
4. Click **Save**.

Assigning Distribution Groups

1. To assign a distribution group, select the group from the **Available Distribution Groups** list and click **Assign.**
2. To remove an assigned distribution group, select the group from the **Assigned Distribution Groups** list and click **Remove**.

Adding a new space

Use **Add New Space** to add a social collaboration space to your Infor Learning Management system. After adding a space, you must associate users, courses or other Infor Learning Management system objects to it to give users access to the new social collaboration space via the Infor Learning Management Portal. If you are the creator of a space, you are automatically able to access it and given full administrative rights to that space.

To add a new space:

1. Select **Collaboration > Manage Spaces > Add New Space**.
2. Specify a Space title and Space description.
3. Specify a start and end date or leave these fields blank to have the space be always available.
4. Select the **Active** check box.
5. Click **Save**.

Customizing text for community menu options

Use **Community Localization** to edit text keys in your collaboration spaces. You can customize or translate the text that is displayed for menu options in your collaboration spaces. For example, you could change the name of the Activity Feed which is default in collaboration spaces to something else, such as What's New. Items displayed in the Resource Value column shows the text as it would be displayed to a user accessing your communities.

To customize text for community menu options:

1. Select **Collaboration > Manage Spaces > Community Localization**.
2. To add new resources:
   a. Click Add New Resource.
   b. Specify this information:

      Resource Key
      Specify a key by which to identify the resource.

      Resource Value
      Specify text to be displayed.

3 Select a language from the **Culture Name** item list.
4 Click the **Save** icon.
5 To edit an existing item:
   a Click the **Edit** icon.
   b Alter the text in the field that is displayed.
   c Click the **Save** icon.

Distributing collaboration spaces manually

Use **Manual Space Distribution** to manually distribute collaboration spaces to users instead of waiting for them to be distributed automatically.

To distribute collaboration spaces manually:

1 Select **Collaboration > Manage Spaces > Manually Space Distribution**.
2 Click **Run** to distribute your collaboration spaces.
3 To view a log of the distribution process, click Distribution Process Log.

Viewing e-meeting information

Use View e-Meeting to view past, present, and future ad-hoc e-meetings. You can view the vendor, type, name, time, date, duration, and notification information for the e-meeting.

If the e-meeting has been organized through WebEX, an indicator is displayed.

To view e-meeting information:

1 Select **Collaboration > Hierarchy level > Manage e-Meetings > e-Meeting nameMore Options >** View e-Meeting.
2 The information is displayed.
3 To download a recording of the link, click Download Recording.

Adding an e-meeting

With e-meetings, users can meet at a central virtual location using e-collaboration software. Users can conference, share files, and view a host's computer, as well as conduct e-meetings via WebEx, if you have purchased a WebEx account.

There are two types of e-meetings. Regular e-meetings are associated with events and, thereby, courses. As these e-meetings are associated with courses in which scores are generated for the user, these e-meetings are scored. To schedule an e-meeting of this type, use the Event Information step of the Course Management Wizard on page 76.

Ad hoc e-meetings, on the other hand, are simple e-meetings that are not associated with any events. They are not associated with training, so scores are not assigned. Use Add e-Meeting to create new ad hoc e-meetings. This is similar to creating the e-meeting right in WebEx. Users who have been made e-meeting facilitators can also create e-meetings in the portal. The duration of the meeting and the number of concurrent users in the meeting are limited by your licensing agreement with the e-meeting host. When the e-meeting is scheduled, a “conflict check” ensures that the number of users requested and duration of the meeting are allowed under your licensing agreement.

To add an e-meeting:

1. Select **Collaboration > Hierarchy level > Manage e-Meetings > e-Meeting name > More Options >** Add e-Meeting.
2. Select a vendor from the **Vendor** item list.
3. Select an e-meeting type from the **Type** item list.
4. Specify a Meeting Name, Description, Password, Number of Users, and Date.
5. Select a time zone from the **Time Zone** item list.
6. Select the time from the **Time** item list.
7. Specify a duration in minutes.
8. To send reminder notifications to users:
   a. Specify this information:

      First Reminder
      Specify the number of days before the meeting that a reminder should be sent.

      Second Reminder
      Specify the number of days before the meeting that a second reminder should be sent.

   b. Enable and configure the notification with Manage Notification Profiles on page 330.
9. Click **Add** to complete the process or click **Reset** to undo your changes.

Removing an e-meeting

Use Remove e-Meeting to remove an e-meeting from a level. Deleting an e-meeting will remove all data associated with that e-meeting. It may also free up some licenses, depending on when the e-meeting is scheduled to take place.

To remove an e-meeting:

1. Select **Collaboration > Hierarchy level > Manage e-Meetings > e-Meeting name > More Options >** Remove e-Meeting.
2. Select **Remove** to remove the e-meeting.

Uploading an e-meeting recording

Use Upload e-Meeting Recording to upload recordings of past e-meetings. These recordings can then be distributed to all users who were unable to attend the e-Meeting.

You will only be able to upload recordings if your e-meeting host records the meeting and makes that file available to you.

To upload an e-meeting recording:

1 Select **Collaboration > Hierarchy level > Manage e-Meetings > e-Meeting name > More Options >** Upload e-Meeting Recording.
2 To locate the recording, click **Browse**.
3 Click **Upload** to complete the process.

Viewing a list of users for an e-meeting

Use View Users to view a list of participants for a scheduled e-meeting.

To view a list of users for an e-meeting:

1 Select **Collaboration > Hierarchy level > Manage e-Meetings > e-Meeting name > More Options >** View Users.
2 Search for the users or click **Show All**.

Adding users to e-meetings

Use Add Users to e-Meetings to assign participants to an e-meeting after the e-meeting has been created.

To add users to e-meetings:

1 Select **Collaboration > Hierarchy level > Manage e-Meetings > e-Meeting name > More Options >** Add Users to e-Meetings.
2 Locate your users or click **Show All** to view all available users.
3 Select the check box next to your users.
4 Click **Add**. A confirmation message is displayed.

Removing users from e-meetings

Use Remove Users from e-Meetings to remove multiple users from an e-meeting. This frees up licenses so that you can assign other users to the e-meeting.

To remove users from e-meetings:

1. Select **Collaboration > Manage e-Meetings > e-Meeting name > More Options >** Remove Users from e-Meetings.
2. Locate the user or select **Show All**.
3. Select the check box for the user.
4. Click **Remove**. A confimration message is displayed,

Reports

Standard Reports	
Report	**Description**
E-Meeting Attendance on page 265	View e-meeting attendance records for a selected event.
E-Meeting Calendar on page 266	View scheduled e-meetings in a calendar.
Event -- e-Meeting Attendance on page 266	View records of e-meeting attendance and session information for selected meetings.

Facilities

A list of all facilities in levels that are assigned to the logged in Administrator is displayed by default when the **Facilities** category is selected. To limit the facilities to a specific level, select the level in the hierarchy. Use the search bar to locate a specific facility by name. Click a facility tile to view the details and facility management options.

Adding a room

Use Add Room to add rooms to facility hierarchy levels, after you have populated the facility-level structure.

Facility levels that contain rooms are indicated by a blue house icon in the Facilities Hierarchy. These are referred to as room levels.

To add a room:

1. Select **Facilities > Facilities Hierarchy level > Facility Rooms >** Add Room.
2. Specify this information:

    Name
    Specify a room name.

    Description
    Specify a description of the room.

    Max Seats
    Specify the amount of available seating in the room.

    Cost
    Specify the cost of the room.

    Address
    Specify the address of the room.

    Other Info
    Specify any additional information.

    Contact Info
    Specify the contact information of personnel to contact for arranging to use the room.

Contact Email
Specify the e-mail address of personnel to contact for arranging to use the room.

Notes
SPecify any miscellaneous information.

3 Click **Add**.

Viewing a room

Use View Room to view all of the properties of a room.

To view a room:

1 Select **Facilities > Facilities Hierarchy level > Facility Rooms >** View Room **> Room name**.

2 View your room information.

Editing a room

Use Edit Room to change the properties of the room or add room items, after a room has been added to the system. Room items are fixtures such as a projector, a whiteboard, or a digital phone line.

Room items must be created before you can add them to a room. See Adding a room item on page 213 for details on adding an item to a room and Managing room items on page 214 for managing the room's items.

To edit a room:

1 Select **Facilities > Facilities Hierarchy level > Facility Rooms >** Edit Room **> Room name**.

2 To edit the room, specify a new Name, Description, Max Seats, Cost, Address, Other Info, Contact Info, Contact Email, and any Notes in the fields.

3 To add a room item to the room:

- a Select a room item from the **Item** item list.
- b Specify the quantity of the item.
- c Click **Add**.

4 To remove a room item from the room:

- a Select the check box for the item.
- b Click **Remove**.

5 Click **Update**.

Removing a room

Use Remove Room to remove rooms. If you remove a room you will be unable to retrieve it. Proceed with caution.

To remove a room:

1 Select **Facilities > Facilities Hierarchy level > Facility Rooms >** Remove Room **> Room name**.
2 Click **Remove**. A confirmation dialog box is displayed.
3 Click **OK**.

Viewing a calendar of all events scheduled for a room

Use Room Calendar to see all events scheduled for a room in the form of a calendar.

The box for the current date is highlighted in blue and the date itself is highlighted in red. Dates which are associated with scheduled events are highlighted in blue. You can view the room's scheduled events for past and future months by using the arrow buttons next to the month at the top of the calendar view.

To view a room calendar:

1 Select **Facilities > Facilities Hierarchy level > Room name > Facility Rooms >** Room Calendar.
2 To view information about a scheduled event, click on the event.

Viewing master room calendar

Use Master Room Calendar to view all scheduled events for a room that take place in any month. This is similar to List View by Room except that you can view only the events scheduled for a specified month instead of viewing all months at once.

To view a master room calendar:

1 Select **Facilities > Facilities Hierarchy level > Room name > Facility Rooms >** Master Room Calendar.
2 Select a month and year from the item lists. The events for that month are displayed.
3 To view event information, click the event.
4 To export calendar to a spreadsheet, click **Export Options**.
5 Select a year.
6 Select the check boxes for the months to export.
7 Click **Export to Excel**.

Viewing a list of all scheduled room events

Use List View by Room to view a list of all room events. This information can also be exported to an Excel spreadsheet.

To view a list of all scheduled room events:

1. Select **Facilities > Facilities Hierarchy level > Room name > Facility Rooms >** List View by Room.
2. To export the schedule as an Excel spreadsheet, click Export to Excel.

Adding a level to the facilities hierarchy

Facility levels are hierarchal levels within Infor Learning Management that represent the organization of facilities and rooms within facilities. The levels exist so that training event facilities can be named, grouped, and organized by their location or your organization's own structure. Rooms can be added to facility levels that are set as room levels. Facility levels can be created between Level 2 and level 10. The higher the number of a facility level, the more specific it is within the Facilities Hierarchy.

Depending on how you organize the facility Levels, you may have a level 2 facility correspond with its location within a state; a subsequent level 3 facility level may correspond to a city within the state. A fourth level may represent the building name within the city level (level 4), and a fifth level would be the room level to which the actual rooms would be added.

After a structure for the facility level has been established by deciding on the names for the facility levels, the next step is to actually set up the facility levels. Using an example of an international company, the following would be examples of facility levels that might fit into the facility level structure:

- Level 1: Country - USA, Canada
- Level 2: Region - Midwest, Northwest, Southwest, Southeast, and Northeast
- Level 3: State - Pennsylvania, Rhode Island, and New York
- Level 4: City - Lancaster, Harrisburg, and Pittsburgh
- Level 5: Building - Heinz Hall for the Performing Arts, the Benedum Center, and the Phipps Conservatory
- Level 6: Floor - 1, 2, and 3
- Level 7: Suite - 3a, 3b, and 3c

You will have to decide where rooms will be added to the structure by specifying which facility levels have rooms for each branch of the structure. To continue the example above, Level 7: Suite would be the branch that will have rooms attached to it. It could be that the Level 5: Building Heinz Hall has only floors but does not have suites. In this case, Level 6: Floor 1, 2, and 3 underneath Heinz Hall would have rooms. If you mark a branch of the tree as a branch that will have rooms (a Room Level), you cannot add levels below that branch. So if you specify the Level 6: Floor 1, 2, and 3 underneath the Heinz Hall as facility levels that have rooms, you will be unable to create suites under those levels. When you specify a level as having rooms, that level is the lowest level in the branch.

To add a level to the facilities hierarchy:

1 Select **Facilities > Facilities Hierarchy level > Facility Levels >** Add Level.
2 Click the parent level of your added level in the Facilities Hierarchy. For example, if you want to create a facility level 1 level, then select the System level.
3 Select a facility level from the **Level** item list.
4 Specify a Name.
5 To make the level you are adding a room level, select the **Room Level** check box .
6 Click **Add**.

Editing a facility level

Use Edit Level to change facility level attributes, after you have created a facility level . If the level is at the lowest point in your Hierarchy you can also select whether or not the facility level has rooms. If the facility level has children-levels below it in the Facilities Hierarchy-then you will be unable to change this setting.

To edit a facility level:

1 Select **Facilities > Facilities Hierarchy level > Facility Levels >** Edit Level.
2 To change the name of the level specify a Name.
3 To enable adding rooms to a level, select the **Room Level** check box. To disable, clear the check box.
4 Click **Update**.

Removing a facility level

Use Remove Level to remove a facility level from your structure.

Caution: After you remove a facility level, you have deleted it from the system. You will lose the facility level you removed plus any facility levels underneath it and any associated rooms. You will not be able to recover these facility levels and rooms. Proceed with caution.

To remove a facility level:

1 Select **Facilities > Facilities Hierarchy level > Facility Levels >** Remove Level.
2 Click **Delete** to remove the facility level. A confirmation dialog box is displayed.
3 Click **OK**.

Naming facility levels

Use Name Facility Levels to name facility levels. Manager can set up a hierarchy of up to ten facility levels. When setting up the Facilities Hierarchy, you should to start with the most general grouping of your facilities and then get more specific with each lower facility level and name them accordingly. For example, a plausible structure for an international company interested in managing facilities at several different locations could have the following structure:

- Level 1: Country
- Level 2: Region
- Level 3: State
- Level 4: City
- Level 5: Building
- Level 6: Floor
- Level 7: Suite

Note that as with the levels in Infor Learning Management, the facility levels are hierarchical in structure. This means that an instance of a Facility Level 1-in our example, a Country such as USA-can have many facility level 2s underneath it-in our example, regions such as Northeast, Southeast, and Northwest-and so on down to the lowest level. After the facility names have specified, these level names are displayed when adding new levels in your Facilities Hierarchy.

To name facility levels:

1. Select **Facilities > Facilities Hierarchy level > Facility Levels >** Name Facility Levels.
2. Specify a name for each facility level.
3. Click **Submit**.

Adding a room item

Use Add Item to add room items useful for course events. Items may include the equipment, furniture, or other fixtures and apparatuses that make an event more conducive to training. You can add any such items to the system. These items can then be added to any of the rooms in your Facilities Hierarchy when they are to be used in a room for an actual event. Room items can be added, edited, and removed from the system.

You must first add room items to the system before you can add room items to a room.

To add a room item:

1. Select **Facilities > Facilities Hierarchy level > Room Items >** Add Item.
2. Specify a Name and Description.
3. Click **Add**.

Managing room items

Use Manage Items to update all of the room items in the system. After you have added room items to the system, you may later need to update their names or descriptions or remove them from the system.

To manage room items:

1. Select **Facilities > Facilities Hierarchy level > Room Items >** Manage Items.
2. To update a room item:
   a. Specify a Name and Description.
   b. Select the item check box in the Update column.
   c. Click **Update**.
3. To remove a room item from the system:
   a. Click the item check box in the Delete column.
   b. Click **Delete**.
4. To refresh the list of room items click **Reset**.

LinkedIn courses

Use the LinkedIn course integration to browse and add LinkedIn courses to the selected level. The courses are launched from the LinkedIn server via the SCORM engine. Because the courses are located on the LinkedIn server, the catalog and the courses are automatically refreshed to reflect any changes. After the course is added to the learning management system, the administrators can then customize the course scheduling the same way as the other courses in the system.

Note: The learners must have a valid LinkedIn account to access the courses.

Reports

A categorized list of all reports that are available for the selected level are displayed when the **Reports** category is selected. Select the report to view the report options.

Understanding Reports

Use the **Reports** category of Infor Learning Management Administrator to define and view reports based on specific needs: reports by system, users, courses, curricula, and certifications. After you select the basis for the report, you can further define the component you want to see. There is an option on every report screen to export the report to Microsoft Excel, so you can manipulate and format the report to meet your needs.

In addition, use The Dynamic Reports function of Administrator to define and view reports based on the Level Hierarchy and specific parameters set during the report generation process. These reports are very useful when trends need to be examined in reference to a user's learning experience.

Date and time data generated by Infor Learning Management Ad Hoc reports display a value based on Greenwich Mean Time (GMT). While the Ad Hoc Infor Learning Management reports do utilize the GMT offset to yield data using your local time, Infor Learning Management Dynamic and Standard reports do not utilize your local time zone settings. Please be aware of this when viewing report data.

You will use **Reports** in conjunction with the Hierarchy to view reports. To do this you must be an administrator at the Hierarchy level where you wish to manage reports.

There are 15 categories of reports available for your use:

Category	Description
Ad Hoc Reports	View custom user-created reports
Certification Reports	View reports based on certifications and certified users
Courses	View reports based on course-related data, such as events, scores, and sessions
Curricula	View reports based on curriculum session data
Curricula Reports	View reports based on curriculum completion data

Category	Description
E-Commerce Reports	View reports based on purchase data by user or course
e-Meetings	View reports based on e-Meeting attendance or calendars
Event Reports	View reports based on enrollment data
Learning Trend Reports	View reports based on learning trend data, such as enrollment, scores, and pre- vs. post-assessment scores
Level Reports	View reports based on level roster data
Score Reports	View reports based on course score data
Session Reports	View reports based on course session data
Statistics Reports	View reports based on course statistics
Users	View session reports and scores by user

If the standard reports do not meet your needs, use dynamic or ad hoc reports.

Dynamic Reports

Use Dynamic Reports to define and view reports based on the Hierarchy level and specific parameters set during the report generation process. Dynamic reports can be used to measure and analyze learning trends. There is more flexibility with dynamic reports than there is with the standard reports offered in Infor Learning Management. With dynamic reports, you can choose the data that you want to see and select the order in which you want that data to appear. For some reports, information can be displayed in a graphical format.

The data incorporated into a dynamic report is automatically generated on a regular basis as the system extracts information from the system database and imports it into the Reporting Data Mart, or RDM.

Ad Hoc Reports

While there is a variety of reports in basic formats in Infor Learning Management, you may have reporting needs that are not satisfied by standard reports. Use the report designer to design custom reports that can be assigned to users. System data is used to generate sophisticated reports. The flexibility of ad hoc reports allows you to do the following:

- Access the datamart to format and generate reports
- Create reports that perform simple calculations
- Include trend, pie, plot, and bar charts within reports
- Create public and private reports
- Assign reports to users to allow them to view information in the Infor Learning Management Portal
- Save reports as CSV, XLS, DOC, XML, and RTF files
- Schedule reports to run automatically
- Send reports to recipients via email

Ad hoc report designer

While there are a variety of reports in basic formats in Infor Learning Management Administrator, you may have reporting needs that are not satisfied by any of these reports. Use ad hoc reporting to go beyond Infor Learning Management and dynamic reports to fulfill these needs. The Ad Hoc Report Designer can be used to quickly design sophisticated custom reports utilizing the latest system data. These reports can be assigned to specific users as needed.

Date and time data generated by Infor Learning Management Ad Hoc reports display a value based on Greenwich Mean Time (GMT). While the Ad Hoc Infor Learning Management reports do utilize the GMT offset to yield data using your local time, Infor Learning Management Dynamic and Standard reports do not utilize your local time zone settings. Please be aware of this when viewing report data.

The flexibility of Ad Hoc Reports allows you to:

- Access the datamart to format and generate reports.
- Create reports that perform simple calculations.
- Include trend, pie, plot, and bar charts within reports.
- Create public and private reports.
- Assign reports to users to allow them to view information in the Infor Learning Management Portal.
- Save reports as CSV, XLS, DOC, XML, and RTF files.
- Schedule reports to run automatically.
- Send reports to recipients via e-mail.

The Reports List is the main page of the Ad Hoc Report Designer. There is a list of available reports that you can view, e-mail, export, and edit. The reports are grouped by the report designer's name and the report's shared status.

You can perform these tasks on this screen:

- Click the report name link to view, export, modify, and update the report.
- View information regarding the report designer's name, whether it is a public or private report, the next scheduled time for the report to run, and the date it was most recently modified.
- Click the Design icon to use the Report Designer to modify the report.
- Click the Delete icon to permanently remove the report from the system.

To create new Ad Hoc reports, use Design New Report Report Designer's tabbed interface to create new Ad Hoc Reports. This simplifies the process of creating new reports, and makes it a more manageable process. Follow the steps below to create a custom report.

Ad Hoc Reports are not level specific. This means that the level a report is created on has no bearing on the data that will be included in the report. You can control that by including appropriate filters in your report design.

The Report Designer Tabbed Interface

Nine tabs simplify the process of creating and modifying Ad Hoc Reports. Detailed instructions for using these functions follow.

- Data Sources - Select the tables and views from which you want your report to draw information. See Understanding data sources on page 220 for more information.

- Fields - Select the fields you want to display in your report. See Understanding fields on page 220 for more information.
- Filters - Select the fields you want to use to filter the report. See Understanding filters on page 232 for more information.
- Summary - Select the fields and values for which you want to display general calculations. See Understanding summary on page 222 for more information.
- Chart - Select the type of chart you want to include in your report. See Understanding chart on page 225 for more information.
- Gauge - Include an animated half circle, radial, or linear gauge in your report. See Understanding gauge on page 230 for more information.
- Misc - Specify basic information about the report. See Understanding misc on page 231 for more information.
- Style - Configure basic report options and colors. See Understanding style on page 231 for more information.
- Preview - View the way the report will look. See Understanding preview on page 234 for more information.

A list of options is displayed on each of these tabs. Use these to navigate to the Report List, create a new report, save your report, print the report in either PDF or HTML format, export the report in a variety of formats such as CSV, XLS, or DOC, or e-mail the report.

Understanding ad hoc reports

While there are a variety of reports in basic formats in Infor Learning Management Administrator, you may have reporting needs that are not satisfied by any of these reports. Use ad hoc reporting to go beyond Infor Learning Management and dynamic reports to fulfill these needs. Use report designer to quickly design custom reports that can be assigned to users. The Report Designer uses system data to generate sophisticated reports.

The Ad Hoc Reports category contains custom reports designed by users of the Infor Learning Management Suite.

Designing a new ad hoc report

To create new Ad Hoc reports, use Design New Report Report Designer's tabbed interface to create new Ad Hoc Reports. This simplifies the process of creating new reports, and makes it a more manageable process. Follow the steps below to create a custom report.

Ad Hoc Reports are not level specific. This means that the level a report is created on has no bearing on the data that will be included in the report. You can control that by including appropriate filters in your report design.

To design a new report:

1. Select **Reports > Ad Hoc Report Designer >** Design New Report.
2. Work through the tabs to design your report.

Understanding data sources

Infor Learning Management data is organized in numerous views. These are sets of data organized into columns and rows. When a report is generated, information is pulled from these tables and views. When you create ad hoc reports using the report designer, you specify the information to be included in the report.

Use **Data Sources** to select the views from which you want to draw the information for the report. You cannot progress to any of the other tabs without first selecting your views. Since these views contain the information you want to report on, you need to tell Infor Learning Management from where to draw the information, before telling Infor Learning Management the actual information that you want to display. The subsequent tabs are dependent upon the views that you select in **Data Sources**.

Views are made up of fields that contain information in Infor Learning Management. Use **Data Sources** to join views. The process of joining views involves linking two views based on a field that is part of both views.

If you're unable to find a data source you need for an ad-hoc report, contact your Infor Learning Management account manager for help generating a customized data source.

When you begin creating Ad Hoc Reports, you should create simple reports. After you are more comfortable with the Report Designer you can make more complex reports.

- The **Allow Nulls** check box prevents your report from containing duplicate entries.
- The views that are stored in the data mart are displayed in the **Data Sources** item list. Select a view from which you want the report to draw information.
- The insert data source above icon inserts a data source row above the current data source row.
- The insert data source below icon inserts a data source row below the current data source row.

After you have selected all of the tables and views you need for your report, click **Continue to Fields**.

Understanding fields

Use **Fields** to specify the fields that are displayed in your report. To select a field, you must have selected a view that can supply the information for that field in **Data Sources**.

- Records - Specify the number of records to display in the report.
- Field - A list of fields that are available from the views you selected in **Data Sources** are displayed. The view name is displayed next to the field name in parentheses, if the field is included in more than one of the selected views. Select the fields you want to display in your report.
- Description - The default field description that is displayed in the report. You can specify a new description to display a different field title in the report.
- Sort - Select the **Sort** check box to sort the report by the corresponding field in ascending order.
- VG - Select the **VG** check box to visually group the data by this field in your report. If you select the VG check box, the **Sort** check box is automatically selected.
- A - Select the **A** check box to add, subtract, divide, or multiply the current field by the field selected in the row above. Click the button until the function you want to use is displayed. If you select **Sessions** as the first field and **Duration** as the second field, you can select ÷ from the **A** check box. When the report runs, the Sessions and Duration fields will be replaced with the value of the calculation of these two fields. The **A** check box is only available for fields that have numeric values.

- Function - Select from the **Function** item list to perform a function on the selected field. These are functions you can perform for the selected field:
    - Average - The mean of all of the values for the current field is calculated.
    - Count - The number of entries is displayed.
    - Count Distinct - The number of unique entries is displayed.
    - Maximum - The highest value for the field is displayed.
    - Minimum - The lowest value for the field is displayed.
    - Sum - The sum total of all of the values for the field is displayed. This simply involves adding all of the values together.
    - Group - Similar items in the report are displayed together.
- Format - Select the format of the current field. You can choose from these formats:
    - 0,000 - The value is displayed as a whole number.
    - $0.00 - The value is displayed as a currency.
    - 0.0 - The value is displayed as a number with one decimal place.
    - 0.00 - The value is displayed as a number with two decimal places.
    - 0.000 - The value is displayed as a number with three decimal places.
    - 0% - The value is displayed as a percentage.
    - % of group - The value is displayed as a percentage of the group. Each entry is calculated as a fraction of the sum of all of the entries. Therefore, percentages for the values in relation to the other value percentages are displayed.
    - Gauge - The value is marked on a linear gauge.
    - Gauge Variable - The value that would be marked is displayed on a linear or dash gauge as a simple numeric value.
    - Dash Gauge - The value is displayed on a radial gauge.
    - Custom URL - The value is displayed as a link. Click the link to open a new window with the value as the target.
    - Link (detail) - The value is a link that is displayed as another report. Click on the link to view report details of the target.
    - Link (embedded) - The value is a link that is displayed as an expansion of the current report. Click on the link to view report details of the target.
    - Link (popup) - The value is displayed as a separate window, after you click on the link.
    - Short Date - The value is displayed as a date using the mm/dd/yyyy format.
    - Long Date - The value is displayed as the day of the week, month, numeric day, and year.
    - Short Time - The value is displayed as a time using the hh:mm AM/PM format.
    - Long Time - The value is displayed as a time using the hh:mm:ss AM/PM format.
    - Full (short) - The value is displayed as a long date and short time.
    - Full (long) - The value is displayed as a long date and long time.
    - Gen (short) - The value is displayed as a short date and short time.
    - Gen (long) - The value is displayed as a short date and long time.
- Add Subtotals Using - A subtotal for each field is rendered using the selected function.
- The insert data source above icon inserts a data source row above the current data source row.
- The insert data source below icon inserts a data source row below the current data source row.
- The move current field row up icon moves the current field row up one row.
- The move current field row down icon moves the current field row down one row.
- Select the gear icon to access Advanced Field Settings. The window includes these options:

    - Column Group - Specify a name for the column group to visually combine columns with identical group names. This enables the individual designing the report to add a column header above several adjacent columns to categorize them.
    - Width - Specify the width of the column in pixels.
    - Label Justification - Click the check box to set the column label to the left, right, or middle of the row.
    - Value Justification - Click the check box to set the value of the field to the left, right, or middle of the row.
    - Subreport - Select an option from the **Subreport** item list to set the drill-down child report.
    - Drill-Down Style - Select from the **Drill-Down Style** item list to determine how the drill-down results are displayed:
        - If you select **Link** the results are displayed in the same browser window.
        - If you select **Link (New Window)** the results are displayed in a new browser window.
        - If you select **Embedded** the results are embedded in the main report.
        - If you select **Popup**, the results are displayed on a pop-up screen.
    - Url - Use this field to open an external address in a new window by passing field values as parameters.
    - Subtotal Function - Select from the **Subtotal Function** item list to determine how the subtotal is displayed.
    - Gradient Cells Shading - Select the **Gradient Cells Shading** check box to set a gradient effect that shades the cells.
    - Text Highlight - Specify a range of values within which the text color should be changed. For example, to make the text red or blue based on the value, the following expression can be used "1 to 25:Blue;26 to 1000000:Red". You can use any color from the **Color** item list in **Styles**.
    - Cell Highlight - Specify a range of values within which the cell background color should be changed. For example, to make the background color red or blue based on the value, the following expression can be used “1 to 25:Blue;26 to 1000000:Red”. You can use any color from the **Color** item list in **Styles**.
    - Value Ranges - Specify an expression upon which changes to values will be based. For example, for the value “less than 25” to be displayed when the value of the field is between 1 and 24, this expression may be used: “1 to 24:Under 25;25 to 50:25-50;50 to 10000:50+”
    - Expression - Specify an expression upon which displayed values will be based. Use Expression to reference multiple fields and perform a calculation to display a result in the field. For example, “COUNT(A) + SUM(B)” where A and B are fields in the current report.
- Quick Add - A pop-up window is displayed with check boxes for all currently selectable fields.
- Preview - The way the report will look with the information that has been specified is displayed. It will also tell you whether you have made any selections which will make the report invalid.
- Add Pivot - Add a pivot field for your report.

After you have selected all of the fields you want for your report, click **Continue to Summary**.

Understanding summary

Use **Summary** to include an area on the report that summarizes the selected fields. In the final report, there will be an area that gives a summary of the total sessions based on the selected function.

- Records - Specify the number of records to display in the report.
- Field - A list of fields that are available from the views you selected in **Data Sources** are displayed. The view name is displayed next to the field name in parentheses, if the field is included in more than one of the selected views. Select the fields you want to display in your report.
- Description - The default field description that is displayed in the report. You can specify a new description to display a different field title in the report.
- Sort - Select the **Sort** check box to sort the report by the corresponding field in ascending order.
- Function - Select from the **Function** item list to perform a function on the selected field. These are functions you can perform for the selected field:
  - Average - The mean of all of the values for the current field is calculated.
  - Count - The number of entries is displayed.
  - Count Distinct - The number of unique entries is displayed.
  - Maximum - The highest value for the field is displayed.
  - Minimum - The lowest value for the field is displayed.
  - Sum - The sum total of all of the values for the field is displayed. This simply involves adding all of the values together.
  - Group - Similar items in the report are displayed together.
- Format - Select the format of the current field. You can choose from these formats:
  - 0,000 - The value is displayed as a whole number.
  - $0.00 - The value is displayed as a currency.
  - 0.0 - The value is displayed as a number with one decimal place.
  - 0.00 - The value is displayed as a number with two decimal places.
  - 0.000 - The value is displayed as a number with three decimal places.
  - 0% - The value is displayed as a percentage.
  - % of group - The value is displayed as a percentage of the group. Each entry is calculated as a fraction of the sum of all of the entries. Therefore, percentages for the values in relation to the other value percentages are displayed.
  - Gauge - The value is marked on a linear gauge.
  - Dash Gauge - The value is displayed on a radial gauge.
  - Custom URL - The value is displayed as a link. Click the link to open a new window with the value as the target.
  - Short Date - The value is displayed as a date using the mm/dd/yyyy format.
  - Long Date - The value is displayed as the day of the week, month, numeric day, and year.
  - Short Time - The value is displayed as a time using the hh:mm AM/PM format.
  - Long Time - The value is displayed as a time using the hh:mm:ss AM/PM format.
  - Full (short) - The value is displayed as a long date and short time.
  - Full (long) - The value is displayed as a long date and long time.
  - Gen (short) - The value is displayed as a short date and short time.
  - Gen (long) - The value is displayed as a short date and long time.
- The insert data source above icon inserts a data source row above the current data source row.
- The insert data source below icon inserts a data source row below the current data source row.
- The move current field row up icon moves the current field row up one row.
- The move current field row down icon moves the current field row down one row.
- Select the gear icon to access Advanced Field Settings. The window includes these options:

- Column Group - Specify a name for the column group to visually combine columns with identical group names. This enables the individual designing the report to add a column header above several adjacent columns to categorize them.
- Width - Specify the width of the column in pixels.
- Label Justification - Click the check box to set the column label to the left, right, or middle of the row.
- Value Justification - Click the check box to set the value of the field to the left, right, or middle of the row.
- Subreport - Select an option from the **Subreport** item list to set the drill-down child report.
- Drill-Down Style - Select from the **Drill-Down Style** item list to determine how the drill-down results are displayed:
    - If you select **Link** the results are displayed in the same browser window.
    - If you select **Link (New Window)** the results are displayed in a new browser window.
    - If you select **Embedded** the results are embedded in the main report.
    - If you select **Popup**, the results are displayed on a pop-up screen.
- Url - Use this field to open an external address in a new window by passing field values as parameters.
- Subtotal Function - Select from the **Subtotal Function** item list to determine how the subtotal is displayed.
- Gradient Cells Shading - Select the **Gradient Cells Shading** check box to set a gradient effect that shades the cells.
- Text Highlight - Specify a range of values within which the text color should be changed. For example, to make the text red or blue based on the value, the following expression can be used "1 to 25:Blue;26 to 1000000:Red". You can use any color from the **Color** item list in **Styles**.
- Cell Highlight - Specify a range of values within which the cell background color should be changed. For example, to make the background color red or blue based on the value, the following expression can be used “1 to 25:Blue;26 to 1000000:Red”. You can use any color from the **Color** item list in **Styles**.
- Value Ranges - Specify an expression upon which changes to values will be based. For example, for the value “less than 25” to be displayed when the value of the field is between 1 and 24, this expression may be used: “1 to 24:Under 25;25 to 50:25-50;50 to 10000:50+”
- Expression - Specify an expression upon which displayed values will be based. Use Expression to reference multiple fields and perform a calculation to display a result in the field. For example, “COUNT(A) + SUM(B)” where A and B are fields in the current report.

- Add Subtotals - Select the **Add Subtotals** check box for subtotals of each section of the report to be displayed.
- Add Deltas - Select the **Add Deltas** check box to add a line beneath each report line that reveals the change between the current row and the preceding row.
- Invert - Select the **Invert** check box to have all of the results for each selected summary field displayed on the same row.
- Preview - The way the report will look with the information that has been specified is displayed. It will also tell you whether you have made any selections which will make the report invalid.

After you have selected all of the fields you want for your report, click **Continue to Chart**.

Understanding chart

Use **Chart** to include a chart in your report. As visual tools, charts present data in a meaningful way. You can choose from four types of charts to facilitate the different sorts of reports you will need to run:

- Trend Chart
- Pie Chart
- Funnel Chart
- Plot Chart
- Bar Chart

Some charts cannot handle a large result pool.

- Records - Specify the number of records to display in the report.
- Chart Type - Select the type of chart you want to include in your report.
- Preview - Click **Preview** to see the way the report will look with the information that has been specified. You can also see whether you have made any selections which will make the report invalid.

Trend, plot, and bar charts all have an X Axis and a Y Axis. In the Report Designer, the X Axis is also known as the Label, and the Y Axis is also known as the Value.

Trend chart options

Trend charts are graphs that show changes in a variable over an extended period of time. You could use a trend chart to show sales or users assessment scores over a period of time.

Some of these fields only appear when you click **Advanced Properties**.

- Title - Specify a title for your chart.
- Date - The date is displayed along the X Axis of the chart. It represents the time period in which the data is being compared. The field you can select here depends on the fields available in the tables and views that you have selected in **Data Sources**. Use the adjacent **Function** item list to decide the way the dates will be grouped.
- Value - The value is displayed along the Y Axis. It represents the value or amount of the variable. The value is the measurement of each instance. The field you can select depends on the fields available in the views you have selected in **Data Sources**.
- Separator - A secondary value that appears along the X Axis. This can be used to measure the data with another time period type. For instance, you may want to measure user scores over time. You can compare their scores monthly and yearly using the same chart. You would select the same field from the **Date** and **Separator** item lists. From the **Date** item list, you may elect to group the dates by month name, while you would elect to group the dates by year from the **Separator** item list. The separator is displayed in a different color, so that you can distinguish the two sets of results.
- Show Value Labels - Select the **Show Value Labels** check box to include labels for values on the chart.
- Label Title - Specify a title for your label on the bottom of the chart.
- Value Title - Specify a title for your value on the left of the chart.
- Function - Select from the **Function** item list to perform a function on the selected date, value, and separator. These are functions you can perform for the selected field:
  - Group (Day) - Same day items are displayed together in the report.

    - Group (Month) - Same month items are displayed together in the report, based on the numeric value of the month.
    - Group (Year) - Same year items are displayed together in the report.
    - Group (Month Name) - Same month items are displayed together in the report, based on the name of the month.
    - Group (Date) - Same date items are displayed together in the report.
    - Group - Similar items are displayed together in the report.
    - Average - The mean of all of the values for the current field is calculated.
    - Count - The number of entries is displayed.
    - Count Distinct - The number of unique entries is displayed.
    - Maximum - The highest value for the field is displayed.
    - Minimum - The lowest value for the field is displayed.
    - Sum - The sum total of all of the values for the field is displayed. This simply involves adding all of the values together.
- Sort - Select the **Sort** check box to determine the order of the date or value variables. You can only select this check box for the date or the value variables; you cannot select both. If you select this check box for the date variables, the dates are displayed in chronological order. If you select this check box for the value variables, the dates will be sorted so that the entries are displayed in ascending order for the value variables.
- Show Legend - If the **Show Legend** check box is selected, a key to let users know what each color represents is displayed.
- Smooth - If the **Smooth** check box is selected, the trend line is displayed as a smooth curve. By default, the trend line is sharp and angular.

Pie Chart Options

Pie charts are circular charts that are divided into sections. These sections typically display percentages of a whole. You could use a pie chart to display the number of users enrolled in each event of a course.

Some of these fields only appear when you click **Advanced Properties**.

- Label - The label is the title of each pie section. The field you can select here depends on the fields available in the tables and views that you have selected in **Data Sources**. Use the adjacent **Function** item list to decide the way the dates will be grouped.
- Value - The value represents the value or amount of the variable. The value is the measurement of each instance, or the section of the pie. The field you can select depends on the fields available in the tables and views you have selected in **Data Sources**. The value should correspond to the label you selected.
- Separator - A secondary value that is displayed as another pie chart. This can be used to measure the data with another time period type. For instance, you may want to measure user scores over time. You can compare their scores monthly and yearly using the pie chart. You would select the same field from the **Label** and **Separator** item lists. From the **Label** item list, you may choose to group the dates by month name, while you would elect to group the dates by year from the **Separator** item list.
- Function - Select from the **Function** item list to perform a function on the selected date, value, and separator. These are functions you can perform for the selected field:
    - Group (Day) - Same day items are displayed together in the report.
    - Group (Month) - Same month items are displayed together in the report, based on the numeric value of the month.
    - Group (Year) - Same year items are displayed together in the report.

  - Group (Date) - Same date items are displayed together in the report.
  - Group - Similar items are displayed together in the report.
  - Average - The mean of all of the values for the current field is calculated.
  - Count - The number of entries is displayed.
  - Count Distinct - The number of unique entries is displayed.
  - Maximum - The highest value for the field is displayed.
  - Minimum - The lowest value for the field is displayed.
  - Sum - The sum total of all of the values for the field is displayed. This simply involves adding all of the values together.
- Sort - Select the **Sort** check box to determine the order of the label or value variables. You can only select this check box for the date or the value variables; you cannot select both. If you select this check box for the label variables, the dates are displayed in chronological order. If you select this check box for the value variables, the dates will be sorted so that the entries are displayed in ascending order for the value variables.
- Show Legend - If the **Show Legend** check box is selected, a key to let users know what each color represents is displayed.
- Show as 3D - The graph is displayed three dimensionally.
- Explode Largest Slice - The largest section of the chart is separated from the rest of the pie.
- Show Percentage - The percentage of each section of the chart is displayed.
- Show Value Labels - Labels are displayed for each value.
- Show Slice Labels - Labels are displayed for each slice.
- Combine Bottom % - Specify a value to combine the smallest sections of the pie chart into a larger section.
- Chart Type - A regular or a doughnut pie chart is displayed. The doughnut pie chart differs in that it has a hole in the middle of the chart. This is a purely an aesthetic setting and does not affect the way the results are actually reported.

Plot Chart Options

Plot charts show values as points on a graph. They are used to compare results. Plot charts rarely display values that have a fixed relationship. Some of these fields only appear when you click **Advanced Properties**.

- X - Use the **X** item list to label the X Axis of the chart. It represents the time period in which the data is being compared. The field you can select here depends on the fields available in the tables and views that you have selected in **Data Sources**. Use the adjacent **Function** item list to decide how the dates will be grouped.
- Y - Use the **Y** item list to label the Y Axis of the chart. It represents the value or amount of the variable. The value is the measurement of each instance. The field you can select depends on the fields available in the tables and views you have selected in **Data Sources**.
- Function - Select from the **Function** item list to perform a function on the selected date, value, and separator. These are functions you can perform for the selected field:
  - Group (Day) - Same day items are displayed together in the report.
  - Group (Month) - Same month items are displayed together in the report, based on the numeric value of the month.
  - Group (Year) - Same year items are displayed together in the report.
  - Group (Month Name) - Same month items are displayed together in the report, based on the name of the month.
  - Group (Date) - Same date items are displayed together in the report.

- Group - Similar items are displayed together in the report.
- Average - The mean of all of the values for the current field is calculated.
- Count - The number of entries is displayed.
- Count Distinct - The number of unique entries is displayed.
- Maximum - The highest value for the field is displayed.
- Minimum - The lowest value for the field is displayed.
- Sum - The sum total of all of the values for the field is displayed.

- Sort - Select the **Sort** check box to determine the order of the label or value variables. You can only select this check box for the date or the value variables; you cannot select both. If you select this check box for the label variables, the dates are displayed in chronological order. If you select this check box for the value variables, the dates will be sorted so that the entries are displayed in ascending order for the value variables.
- Show Legend - If the **Show Legend** check box is selected, a key is displayed to let users know what each color represents.

Bar Chart Options

Bar charts are graphs that have rectangular blocks. The height of these blocks represents their value. Bar charts are useful in comparing items. You may want to use a bar chart to show users that have passed this month. Some of these fields only appear when you click **Advanced Properties**.

- Title - Specify a title for your chart.
- Records - Specify the number of records to display in the report.
- Label - The label is displayed along the X Axis of the chart. It represents the time period in which the data is being compared. The field you can select here depends on the fields available in the tables and views that you have selected in **Data Sources**. Use the adjacent **Function** item list to decide the way the dates will be grouped.
- Value - The value represents the value or amount of the variable and is displayed on the Y axis. The value is the measurement of each instance. The field you can select depends on the fields available in the tables and views you have selected in **Data Sources**.
- Separator - A secondary value that is displayed along the X Axis. This can be used to measure the data with another time period type. For instance, you may want to measure user scores over time. You can compare their scores monthly and yearly using the same chart. You would select the same field from the **Label** and **Separator** item lists. From the **Label** item list, you may choose to group the dates by month name, while you would elect to group the dates by year from the **Separator** item list. The separator is displayed in a different color, so you can distinguish the two sets of results.
- Function - Select from the **Function** item list to perform a function on the selected date, value, and separator. These are functions you can perform for the selected field:
  - Group (Day) - Same day items are displayed together in the report.
  - Group (Month) - Same month items are displayed together in the report, based on the numeric value of the month.
  - Group (Year) - Same year items are displayed together in the report.
  - Group (Month Name) - Same month items are displayed together in the report, based on the name of the month.
  - Group (Date) - Same date items are displayed together in the report.
  - Group - Similar items are displayed together in the report.
  - Average - The mean of all of the values for the current field is calculated.
  - Count - The number of entries is displayed.

- Count Distinct - The number of unique entries is displayed.
- Maximum - The highest value for the field is displayed.
- Minimum - The lowest value for the field is displayed.
- Sum - The sum total of all of the values for the field is displayed.

- Sort - Select the **Sort** check box to determine the order of the label or value variables. You can only select this check box for the date or the value variables; you cannot select both. If you select this check box for the label variables, the dates are displayed in chronological order. If you select this check box for the value variables, the dates will be sorted so that the entries are displayed in ascending order for the value variables.
- Show Legend - If the **Show Legend** check box is selected, a key is displayed to let users know what each color represents.
- Shade Area Under Line - Select the **Shade Area Under Line** check box to adds shading below the lines on the chart.
- Label Title (Bottom) - Specify the title for the label on the bottom.
- Value Title (Left) - Specify the title for the value on the left.
- Value Title (Right) - Specify the title for the value on the right.

Funnel Chart Options

Bar charts are graphs that have rectangular blocks. The height of these blocks represents their value. Bar charts are useful in comparing items. You may want to use a bar chart to display users that have passed this month.

- Title - Specify a title for your chart.
- Records - Specify the number of records to display in the report.
- Label - The label is displayed along the X Axis of the chart. It represents the time period in which the data is being compared. The field you can select here depends on the fields available in the tables and views that you have selected in **Data Sources**. Use the adjacent **Function** item list to decide the way the dates will be grouped.
- Value - The value represents the value or amount of the variable and is displayed on the Y axis. The value is the measurement of each instance. The field you can select depends on the fields available in the tables and views you have selected in **Data Sources**.
- Function - Select from the **Function** item list to perform a function on the selected date, value, and separator. These are functions you can perform for the selected field:
  - Group (Day) - Same day items are displayed together in the report.
  - Group (Month) - Same month items are displayed together in the report, based on the numeric value of the month.
  - Group (Year) - Same year items are displayed together in the report.
  - Group (Month Name) - Same month items are displayed together in the report, based on the name of the month.
  - Group (Date) - Same date items are displayed together in the report.
  - Group - Similar items are displayed together in the report.
  - Average - The mean of all of the values for the current field is calculated.
  - Count - The number of entries is displayed.
  - Count Distinct - The number of unique entries is displayed.
  - Maximum - The highest value for the field is displayed.
  - Minimum - The lowest value for the field is displayed.
  - Sum - The sum total of all of the values for the field is displayed.

- Sort - Select the **Sort** check box to determine the order of the label or value variables. You can only select this check box for the date or the value variables; you cannot select both. If you select this check box for the label variables, the dates are displayed in chronological order. If you select this check box for the value variables, the dates will be sorted so that the entries are displayed in ascending order for the value variables.
- Show Percent - If you select the **Show Percent** check box, the percent each section of the chart represents is displayed.

After you have selected the chart, click **Continue to Gauge**.

Understanding gauge

Use **Gauge** to include a visualization of a field. There are three types of gauges you can use: the Animated Half Circle gauge, Radial Gauge or the Linear Gauge. The Animated half circle resembles a speedometer and animates when first displayed. The radial gauge resembles a speedometer and does not animate, while the linear gauge resembles a ruler. The values are displayed as a marking on the selected gauge. You may want to include some gauges with your report to highlight the most important data. You can include up to sixteen gauges in your report. Since gauges measure empirical data, you should only use them to display numerical data.

- Title - Specify a title for your gauge.
- Results - Select the number of gauges displayed on the report.
- Name - Select the field that will serve as the scale by which the value is measured.
- Sort - Select the field by which the gauges will be sorted.
- Value - Select the field that will serve as the value of the gauges. The value is the number that is marked on the gauge.
- Function - Select from the **Function** item list to perform a function on the selected value or marking of the gauge. These are functions you can perform for the selected field:
  - Average - The mean of all of the values for the current field is calculated.
  - Count - The number of entries is displayed.
  - Count Distinct - The number of unique entries is displayed.
  - Maximum - The highest value for the field is displayed.
  - Minimum - The lowest value for the field is displayed.
  - Sum - The sum total of all of the values for the field is displayed.
  - Group - Similar items are displayed together in the report.
- Radial - Select the **Radial** radio button to include a radial gauge in your report.
- Radial 2 - Select the **Radial 2** radio button to include a radial gauge-style 2-in your report.
- Animated Half Circle - Select the **Animated Half Circle** radio button to include an animated half circle gauge in your report.
- Linear - Select the **Linear** radio button to include a linear gauge in your report.
- Preview - Click **Preview** to see the way the report will look with the information that has been specified. You can also see whether you have made any selections which will make the report invalid.

After you have selected all of the fields you want for your report, click **Continue to Misc**.

Understanding misc

Use **Misc** to specify administrative settings for the report. These settings include report name, description, privacy, and schedule. If you want to modify a read-only report that was created by another designer, use **Save As** to make a copy of the report and modify the new copy.

- Title - Specify the name of the report.
- Description - Specify some information about the report.
- Report Header - Specify text that is displayed at the top of the report on the first page.
- Page Header - Specify text that is displayed at the top of each report page.
- Footer - Specify text that is displayed at the bottom of each report page.
- Share With - Select from the **Share With** item list to choose with whom the report is shared.
- Rights - Select from the **Rights** item list to set what actions users can take with a report that is shared with them.
- Drill-Down Key - Select a field to use as a link to a drill-down report from the **Drill-Down Key** item list.
- Schedule - Schedule the report to run automatically. To schedule the report, select the date and time you want the report to run from the drop downs.
- Repeat Type - Select from the **Repeat Type** item list to set the frequency of reports you want to run on a schedule.
- Send Email as - Select from the **Send Email as** item list to select the format of the report e-mail.
- Recipients - Specify the e-mail addresses of the individuals you want the report to be sent to on the selected frequency.
- Preview - Allows you to see the way the report will look with the information that has been entered. It will also tell you whether you have made any selections which will make the report invalid.

After you have selected all of the fields, click **Continue to Style**.

Understanding style

Use **Style** to customize the look of the report, by changing the text and background colors and the order of the report areas.

- **Border color** - use to set the color of the border separating the cells.
- **Header color** - use to set the background color of the row that contains the header text.
- **Header foreground color** - use to set the color of the header text.
- **Item color** - use to set the background color of the rows that contain the results.
- **Item Foreground Color** - use to set the color of the result text.
- **Alternating Item Color** - use to set the background color of every other row containing results.
- **Restore Default** - use to revert to the original settings.
- **Sample Grid** - the way the report will be displayed with selected colors.
- **Landscape Printing** - select to print your report horizontally from left to right.
- **Show Page Number** - select to display page numbers when the report is exported to PDF.
- **Show Date and Time** - select to display the date and time when the report is exported to PDF..
- **Use Pagination in Web View** - select to display only a specific number of results on each web page.

- **Add bookmark for each visual group** - select to create anchors for each visual group. Item links are displayed at the top of the screen and are used to jump down to each visual group.
- **Page Break After Visual Groups** - select to insert a page break after each visual group.
- **Minimize Grid Width** - select to display the grid at the minimum possible width.
- **Visual Group Style**
  - **Comma Delimited** - select to separate each piece by a comma. This is a popular format for transferring data from one application to another, because most database systems are able to import and export comma-delimited data.
  - **Comma Delimited With Labels** - select to separate each piece of data by a comma and labeled.
  - **Line Delimited** - select to have each piece of data on a separate line.
  - **Line Delimited With Labels** - select to have each piece of data on a separate line and labeled.
  - **Field Value** - select for a cleaner, more modern display.
  - **Multi Level** - select to have each piece of data on a separate line with the first two data pieces in a bold type face.
  - **Multi Level With Labels**- select to have each piece of data on a separate line and labeled with the first two data pieces in a bold type face.
  - **VG Hierarchy** - select to display the fields defined as Visual Groups in sections that can be expanded and collapsed.
- **Items Per Page** - specify the number of results that are displayed on each page.
- **Report Order** - select the Move Field icons to rearrange the order of the report areas.
- **Field | Value Column Pairs** - specify the number of columns, the field and value pairs.
- **Show Main Report in Field | Value Style** - select to display the results in a way that matches the field name with the value name. Select this option to display the main report field/value pairs in the style that is selected from the previous item list.
- **Show Summary Report in Field | Value Style** - select to display the results in a way that matches the field name with the value name. Select this option to display the summary field/value pairs in the style selected from the previous item list.

Click **Continue to Filters**.

Understanding filters

Use **Filters** for two distinct purposes. You can limit the results that users see in the report, so you can satisfy your organization's security requirements. You can filter the report so that users only see their own information, or user managers only see the information for their users. You can also filter the report, so that only information of a certain type is displayed. If you create a report to view user course scores, you can use **Filter** to restrict the data to scores of a particular course. The former prevents users from seeing information not permitted by the filters, while the latter allows users to change the report views. This may make it easier for users to find the information they need.

To filter a report to only allow users to view their own data, you will need to use **Filter** in conjunction with Ad Hoc Reports: Manage Ad Hoc Reports: Filter Report By User on page 236. After the screen is displayed, select the check box for the filter that corresponds to the user ID. The user will only see data for his own user ID when the report is viewed in the Infor Learning Management Portal.

To filter a report to only allow users to view their own information, select **UserId** from the **Filter Field** item list, and then select **Equals** from the **Operator** item list. Clear the **Value(s)** and **Param** check boxes.

- Filter Field - Select the fields by which you want to filter the report from the **Filter Field** item list.
- Operator - Select operations that you can perform on the selected field from the **Operator** item list. You can choose from these operations:
  - Equals - Select **Equals** to only show results that are equal to the value you specify.
  - Is Less Than - Select **Is Less Than** to only show results that are less than the value you specify.
  - Is Greater Than - Select **Is Greater Than** to only show results that are more than the value you specify.
  - Between - Select **Between** to only show results that are more than the first value and less than the second value that you specify.
  - Doesn't Equal - Select **Doesn't Equal** to show all results, except for the ones that match the value you specify.
  - Doesn't Equal (Select) - Select **Doesn't Equal (Select)** to show all results, except for the ones that match the value you select from the item list.
  - Isn't Less Than - Select **Isn't Less Than** to only show results that are more than or equal to the value you specify.
  - Isn't Greater Than - Select **Isn't Greater Than** to only show results that are less than or equal to the value you specify.
  - Isn't Between - Select **Isn't Between** to only show results that are less than the first value and more than the second value that you specify.
  - Equals Autocomplete - Select **Equals Autocomplete** to have field values displayed that match the text that the user specifies.
  - Equals Checkboxes - Select **Equals Checkboxes** to have each option displayed with a check box for users who are not familiar with how to select multiple items in a list.
- Value(s) - Select the value to which the selected operation will be applied. This will be an item list or a field, depending on the type of operation you select. Leaving this field blank allows the user to choose the value, as long as the **Param** check box is selected.
- Blank - If you select the **Blank** check box, only items that do not have a value for the field are displayed.
- Param - If you select the **Param** check box, users can modify the filter parameters from the report viewer. For example, if you set one of the filters to course name, and then select the **Param** check box for that filter, the user can filter the results by course name when they view the report in the Infor Learning Management Portal.
- Select the Insert data source icons to insert a field above or below the current row.
- Select the Move field icons to rearrange the order of the report areas.
- Require - Select from the **Require** item list to require a certain amount of parameters in the report.
- Preview - Select **Preview** to see the way the report will look with the information that has been specified. You can also see whether you have made any selections that will make the report invalid.

Understanding preview

The report, as it is displayed to the user, is displayed in **Preview**. You can use this preview to determine whether you need to make any other changes. If there are any problems with your report, the Report Designer will let you know in **Preview**. To view the element that caused the report to become invalid, click the link that is displayed.

If you have modified someone else's private report, you will not be able to save it. Instead, click **Save As...** to create a copy of the report. If the report is filtered by user, that filter will not be enforced when the report is viewed from the designer. It is only enforced when the report is viewed from the Infor Learning Management Portal.

Ad hoc report dashboards

Use **Ad Hoc Report Dashboards** to combine several reports or different parts of reports into one view. The same levels of security for regular ad hoc reports also apply to dashboards You can share these views in the ILM Portal via the Ad Hoc Reports dashboard widget.

Expand the dashboard menu to view these options:

Menu Option	Description
Hide Buttons	Close the dashboard menu
Presentation Mode	Scroll through the dashboard tiles in a carousel view
Create a New Dashboard	Create a new dashboard view
Refresh	Refresh all tile elements such as data and filter and style settings.
Show Dashboard Filters	View available dashboard filters
Share With	Share dashboard with other users
Schedule	Send the dashboard via an email at a scheduled time
Print	Print the dashboard in HTML or PDF format
Save Dashboard	Save the current dashboard with the same name or with a different name
Change background	Change background color or image

Creating a new dashboard

1 Select **Reports > Ad Hoc Report Dashboards**.

2 Expand the menu and click **+**. The blank dashboard is displayed.

3 Click **+** to add a report part to the new dashboard
4 Select the report to add. Optionally, you can filter the reports by category.
5 Select a view from the list of views available for the selected report. The list may include views such as charts, maps, gauges, summaries, or report details.
6 To add additional tiles to the dashboard, click on a blank area of the dashboard background and repeat steps 4 and 5.
7 To remove a report from the dashboard, click **X** on the report tile and then click **Remove Tile**.
8 To view tile options, click on the menu icon on the report tile. In the options view you can add the report title and description, print, export to Excel, open the report in viewer, reload the tile from the source, add additional report parts, and set the records count.
9 Click the save icon to save the dashboard.
10 Specify the dashboard title and select the category from the dropdown list.
11 Click **OK**.

Assigning ad hoc reports to users

Use **Assign Ad Hoc Reports to Users** to assign a particular report to a single user or group of users. Those users can then view that report data in the Infor Learning Management Portal. A designer's private reports can only be viewed by the designer in the Report Designer. You can only assign public reports to users.

To assign ad hoc reports to users:

1 Select **Reports > Hierarchy level > Manage Users > Assign Ad Hoc Reports to Users > Report name**.
2 Use the search options to find the user or click **Show All**.
3 Select the check box for each user.
4 Click **Add**.

Removing ad hoc reports from users

Use **Remove Ad Hoc Report Users** to remove reports from a user's assigned reports.

To remove reports from users:

1 Select **Reports > Hierarchy level > Manage Users > Remove Ad Hoc Reports from Users > Report name**.
2 Use the search options to find the user or click **Show All**.
3 Select the check box for each user.
4 Click **Remove**. A confirmation dialog box is displayed.
5 Click **OK**.

Assigning users to ad hoc reports

Use **Assign Ad Hoc Reports to User** to assign multiple Ad Hoc Reports to a single user in the system. Users can view their assigned reports in the Infor Learning Management Portal. A designer's private reports can only be viewed by the designer in the Report Designer. You can only assign public reports to users.

To assign users to ad hoc reports

1. Select **Reports > Hierarchy level > Manage Users > Assign Users to Ad Hoc Reports > Report name**.
2. Select the check box for each user.
3. Click **Assign**.

Removing users from ad hoc reports

Use **Remove Users from Ad Hoc Reports** to remove any reports that have been assigned to a particular user.

To remove users from ad hoc reports:

1. Select **Reports > Hierarchy level > Manage Users > Remove Users from Ad Hoc Reports > Report name**.
2. Select the check box for each user.
3. Click **Remove**. A confirmation dialog box is displayed.
4. Click **OK**.

Filtering ad hoc reports by user

Use **Filter Ad Hoc Reports by User** to limit the Ad Hoc Report results that are displayed to users in the Infor Learning Management Portal. You can use it to ensure that users can only view certain types of information. You can only limit data for which a filter has been created in Ad Hoc Report Designer.

To prevent users from seeing particular values in a report, use **Filter Ad Hoc Reports by User** in conjunction with **Filters** in Ad Hoc Report Designer. You must first create a User ID filter in Ad Hoc Report Designer and clear the **Param** check box, and then enable the User ID filter via the Filter Report by User option.

The filters you choose must be fields that will be equal to a User ID value such as User ID, Author ID, User-Manager ID, Admin ID, or Instructor ID.

To filter ad hoc reports by user:

1. Select **Reports > Hierarchy level > Filter Ad Hoc Reports by User > Report name**.

2 Select the check box for the filter.
3 Click **Apply** to complete the process or **Reset** to undo.

Defining distribution rules for an Ad Hoc report

Use **Ad Hoc Reports Distribution** to manage distribution rules and automate the assignment of Ad Hoc Reports. You can add new rules, modify existing rules, enable/disable rules, remove rules or run the distribution process for a selected Ad Hoc Report.

Each distribution rule has these two check box options:

- The **Keep existing users** check box is selected by default. When this option is selected, existing users of the Ad Hoc report are not removed, even if these users do not match the specified conditions.
- The **Portal Managers Only** check box is clear by default. When this option is selected, users need a Portal Manager role assigned to them, in addition to the other conditions specified to satisfy the rule conditions. The Portal Manager role can be granted at any level of the hierarchy and does not necessarily have to be on the same level as the rule that is being created.

Similar to distribution rules for curricula and catalogs, Ad Hoc distribution rules are level specific. Thus, the rule will apply only to users existing on the level when the rule was created.

To define distribution rules for an Ad Hoc report:

1. Select **Reports > Hierarchy level > Ad Hoc Reports Distribution**.
2. Select an Ad Hoc report from the list.
3. To add a new distribution rule:
   a. Select **Add New**.
   b. Specify the **Distribution Rule Name**.
   c. Click the add line icon (+) to create a new condition line.
   d. In the first field, select the data field that will be evaluated to see if the user meets the selection criteria. Additional fields are displayed to build the condition.
   e. In the second field, select the type of comparison that will be used to evaluate the condition. You can select **`Contains`**, **`Starts with`**, or **`Equal to`**.
   f. In the last field, enter the specific value that the data field should be evaluated against using the above condition to determine whether the user is a match for the rule.
4. Select or clear the **Keep existing users** and **Portal Managers Only** check boxes.
5. Click **Save**. A confirmation message is displayed.
6. Click **OK**.
7. To run the distribution rule, click **Run**.

Understanding the dynamic reports interface

Use the dynamic reports interface to specify levels and report options for each individual report. A set of default fields are displayed within each dynamic report. These default fields can be modified using Report Options.

Display Columns

Use Display Columns to specify the information fields that are displayed in the report. Select the check boxes for the fields that you want to display in the report. You can include general user, course, curriculum, and certification information. There are also options that are relevant to particular dynamic reports. For example, you can have the User Response field displayed in the Survey - By Course report, while it is not available for the Level Roster report. You can click Add to sort to add the information field to Sorting Columns. Use the Move Up and Move Down buttons to change the sorting order in your report.

Sorting Columns

Use Sorting Columns to specify the fields that will determine the order in which the report items are displayed. You can select a primary, secondary, and supplementary sort field. If you have Course Name as the primary sort field and the User Name as the secondary sort field, then the report will first display all courses that begin with the letter A. When the course name for two items is the same, the user name will determine the order of those items. For each sort field, you can have the items appear in ascending or descending order. You can always change your sort fields by clicking Remove. You can use the Move Up and Move Down buttons to change the sorting order in your report.

Additional report options

Use the Additional Report Options to specify parameters relevant to the type of Dynamic Report you are working with. For all Dynamic Reports, you can select criteria you can use to break the report into different groups. This results in smaller report sections with in the Dynamic Report. Regardless of the criteria you select, the sorting settings still apply to all of these sections within the report.

Different Dynamic Reports have different Additional Options. For most of them you can also select the time period for which you want to run the report. You can also opt to only generate your report on certain types of items. Use the Infor Learning Management Statistics Report to run the report on items that have Normal Assessments, Pre Assessments, or Post Assessments. Clear the **Normal Assessment** check box to remove items that do not have Pre Assessments or Post Assessments from the report.

Please refer to the Information Fields Glossary on page 240 for more information on the available report options.

Click **Restore Default Settings** to return the Dynamic Report options to the initial state.

These are ways to navigate through the list of available Display Columns:

- Use the scroll bar to navigate through the list of available display columns.
- Highlight a single display column by clicking on its name.
- Highlight multiple display columns by pressing CTRL + click.

- After you have highlighted one or more items, use the Move Up and Move Down buttons to move the selected display columns into the order that you would like them displayed in your report.
- Use **Check All**, **Uncheck All**, and **Inverse Check** to control the selection of available display columns.

Understanding dynamic reports and levels

The level check boxes in the Hierarchy are displayed after you select a Dynamic Report option. This enables greater flexibility in generating Dynamic Reports because you can run a single report against multiple levels.

For certain Dynamic Reports, you must select items like users, courses, curricula, and certifications from an item list. After you select this information, you can set your report options and generate the report. The items that are displayed in the item list depend on the level you select in the Hierarchy. After you select an item, you can select the check boxes for the levels you want to run the report against.

In the tree view, an administrator can run a report in three of the sub levels of a parent level. The administrator first highlights the parent level of the levels the administrator wants to run the report on, and then selects the subject of the report from the item list. Then the administrator can select the levels that the administrator wants the report to actually cover.

Please note that the levels you select must be in the same tier as the level you highlight.

Understanding dynamic reports and manager roles

Infor Learning Management Administrators, Course/Curriculum Managers, and User Managers can run dynamic reports based on the levels in which they have access. This depends upon the rights they have been given in the system. Dynamic reports run by:

- System administrators with full rights will cover all users, courses, and curricula in the selected level.
- Course/curriculum managers will only cover the courses/curriculum that have been assigned to those managers.
- User managers will only cover the users that have been assigned to those managers.

Viewing and exporting dynamic reports

Microsoft SQL Server Reporting Services are used for dynamic reports. With this service, Infor Learning Management administrators and managers can view reports in a user-friendly environment. Reports can be exported to CSV, Excel, or web page formats. Additionally, you can print the report directly from Infor Learning Management Administrator. To print a dynamic report, the Microsoft SQL Server Reporting Services must be installed on your system.

These are the icons and controls you need to know to view, export, and print your Dynamic Reports.

- Click the dynamic report navigation icons to search or navigate by page within the generated dynamic report generated.
- Click the dynamic report search field to search for content within a dynamic report.
- Select a format from the dynamic report export format item list and click Export to export a Dynamic Report. The formats include HTML with Office Web Components, Microsoft Excel, Web archive, Adobe Acrobat PDF, TIFF, CSV comma delimited, and XML file with report data.
- Click the dynamic report refresh icon to refresh report data as needed.
- Click the dynamic report print icon to send the rpeort to a printer.
- Click the dynamic report help icon for helpful information regarding viewing & exporting a Dynamic Report using Microsoft SQL Server™ reporting services.

Using information fields in dynamic reports

You can customize and run a dynamic report based on information fields that best fit your needs. Below is a glossary of all the information fields utilized in dynamic reports.

General User Information Fields	
Address/Street Address:	The number and street of the user's home address.
City:	The user's home city.
Company Name:	The user's employer: the company that is providing the e-Learning.
Country:	The user's home country.
County:	The user's home county.
Date Graduated:	The month, day, and year when the user graduated from college or high school.
Date Hired:	The month, day, and year when the user was effectively employed by his or her company.
Department:	The user's division in his or her company.
Education Level:	The highest level of education completed by the user, such as high school, college, graduate school.
Email:	The user's e-mail address. Course registration and cancellation notifications will be sent to this address.
Employee ID:	The numbers or letters assigned to the user by his or her employer, for identification purposes.
First Name:	The user's given name.
Gender:	The user's sexual classification: male or female.
Last Name:	The user's surname

General User Information Fields	
Login Name:	The name the user specified to access Infor Learning Management.
Nickname:	The user's short name.
Phone/Extension:	The number at which the user can be reached.
School Graduated:	The College, University, or High School from which the user graduated.
SSN:	The user's social security number or tax identification code: xxx-xx-xxxx
State:	The user's home state.
Supervisor ID:	A code that identifies the user's department supervisor.
Title:	The user's job title.
User Name:	The user's first name and last name, such as Doe, John.
Zip:	The postal code of the user's residence or office.

General Administrative Fields	
Classroom Portion End:	The time and date when the classroom portion concludes.
Classroom Portion Start:	The time and date when the classroom portion commences.
Course Audience/Audience:	The groups or individuals for whom a course is intended.
Course Description/Description:	The course overview. The purpose and usefulness of the course may be displayed, supplemented by a brief summary.
Course Name:	The title of the course. This is the name displayed in the course list in Infor Learning Management Learner.
Course Objectives/Objectives:	A list detailing the knowledge and skills that the user will learn from the course.
Course Short Name/Short Name:	A brief name for the course. This name is for internal record keeping purposes and is not displayed to the user.
Curriculum Description:	The curriculum overview. The purpose and usefulness of the curriculum as well as the required courses are displayed. The description may be supplemented by a brief summary.

General Administrative Fields	
Curriculum Name:	The title given to a collection of courses. This is the name that is displayed in the curriculum list in Infor Learning Management Learner.
Custom 1 – 6:	The six user fields that administrators can customize in Infor Learning Management Administrator.
Environment Name:	The name of a group of modules.
Event Cancelled:	Tells whether or not an event has been cancelled: true and false.
Event End:	The date and time a classroom, Infor Learning Management, or online course concludes.
Event Name:	The title of a course event. This is the name displayed in the course list in the Infor Learning Management Portal.
Event Notes:	Additional information about a course event.
Event Start:	The date and time a classroom, Infor Learning Management, or online class commences.
Event Type:	The type of event that is associated with a particular course, such as Infor Learning Management, online, and classroom portions.
Maximum Enrollment:	The greatest number of people that can be enrolled in a classroom course.
Minimum Enrollment:	The fewest number of people that must be enrolled in a classroom event.
Module Name:	The name of the lesson or groups of pages, known as a module.
Online Portion End:	The time and date when the online portion, or 3rd party course content, concludes.
Online Portion Start:	The time and date when the online portion commences.
Page Name:	A course page where text and graphics are displayed. This is the smallest unit of a course.
Registration End:	The date at which registration for an event is no longer available.
Self Cancellation:	The date at which a user can no longer cancel him or herself from a course via their Infor Learning Management Portal.
Unique User ID:	A code used to identify the user in Infor Learning Management.

General Administrative Fields	
Infor Learning Management Portion End:	The time and date when the Infor Learning Management portion concludes.
Infor Learning Management Portion Start:	The time and date when the Infor Learning Management portion commences.

Score Report Fields	
Answered Correctly:	The number of questions answered correctly in an assessment.
Assessment Type:	The class of the assessment. An assessment can be a Pre-Assessment, Normal Assessment, or Post-Assessment.
Correct:	Tells whether or not the user answered a particular question correctly: true or false.
Credits Earned:	The number of credits the user has earned from passing his or her courses.
Date Scored:	The month, day, and year when the user earned a score for a particular course or test.
Difference:	The gap between a users pre and post assessment scores.
External Test Name:	The name of a test that is given in a classroom or 3rd party online course.
Mode:	The type of assessment that is being reported.
Module Score:	A user's lesson score. This is calculated by going through the module, or by completing the exercises within the module.
Passing Score:	The minimum score a user must earn to satisfy the requirements of a given course.
Post Assessment:	A test given at the conclusion of a course. Post-Assessments are used to measure what a user has learned from a course. These tests are also used to determine whether or not a user has passed the course.
Post Assessment Score:	The score a user earns on a test that is given at the conclusion of a course. This score may determine whether or not the user has passed the course.
Pre assessment:	A test given at the beginning of a course. Pre-Assessments are used to determine a user's level of knowledge before taking the course.

Score Report Fields	
Pre Assessment Score:	The score a user earns on a test that is given at the beginning of a course. This score may determine the topics that a user must learn. It may also contribute to the knowledge gap data.
Question Weight:	The gravity of a particular question that determines the user's module, course, or test score. Total question weights must equal 100.
Total Questions:	The number of questions in an assessment.
User Score:	The score the user earned on a test, module, or course.
Weighted Score:	The calculated score based on weighted questions.

Session Report Fields	
Average Session Duration:	The average length of time a user spends in a course.
Credit:	The number of credits the user earns from passing a course.
Time Online:	The total amount of time a user spends online. This includes time spent in the Infor Learning Management Portal, viewing courses, and in Administrator.
Total Sessions:	The amount of times a user has accessed a course.

Event Report Fields	
Status:	A user's status in Infor Learning Management. A user can be active or inactive.

Certification Report Fields	
Certificate Code:	A code that identifies a certificate.
Certificate Name:	The title of the certificate. This is the name displayed in the certificate list in the Infor Learning Management Portal.
Description:	An explanation or overview of the certification.
Expiration Date:	The month, day, and year when a certification ends. Users should consider re-certification by this date.

Certification Report Fields	
Completion Date:	The month, day, and year when an organization authorizes a certification for a user, who has satisfied certain requirements.
Organization:	The group that issues a certificate.

Statistics Report Fields	
Assessment Average Score:	The mean score users have earned on a particular assessment.
Assessment Name:	The title of a test given in a course.
Assessment Passing Score:	The minimum score a user needs to earn to satisfy the assessment requirements.
Average Time per User:	The mean time users have spent in a particular course.
Course Sessions:	The number of times a user has visited a course.
Course Users:	The number of users registered for a particular course.
New Registrations:	The number of people that have recently registered for a course or event.
Time Spent In the Course:	The total amount of time a user has spent in a course. This includes time spent in all sessions of the course.
User Course Sessions:	The number of times a user has visited a particular course.
Users Failed Assessment:	The number of users that have not satisfied the minimum assessment requirements.
Users Passed Assessment:	The number of users that have satisfied the minimum assessment requirements.
Users with Scores:	The number of users that have scores for a particular course or assessment.

Certification Reports

In Infor Learning Management there are reports detailing certification activities in the system. Certifications are associated with courses and curricula. Certifications can automatically be assigned to users in Infor Learning Management and the administrator can assign a certification to a user after the necessary requirements have been met.

This table shows the certification reporting options:

Report	Description
Certifications - By User (Advanced) on page 246	View certifications by user.
Certified Users (Advanced) on page 249	View users who have earned certifications in Infor Learning Management.
Certified Users - By Certification (Advanced) on page 250	Certification View a list of certified users by certification.
View Program (Advanced) on page 248	View a certification overview report.

Certifications - By User (Advanced)

This topic applies to the Advanced Certification Component only. If you do not have the Advanced Certification Component enabled, please see Certifications - By User (Basic) on page 247 .

The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use **Certifications - By User** to view the certifications a user has earned, and specific details of those certifications. It is a handy tool because you can see all of the certifications a user has earned and how long the user has until the certification expires. It displays the certifications name, organization, completion date, and expiration date. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To work with a certifications - by user report:

1. Select **Reports > Certification Reports > Certifications -- By User > Hierarchy level**.
2. Select the check box for each sub-level of the selected Hierarchy level on which you wish to run a report.
3. Select a user from the list.
4. To customize your report:
   a. Click **Show/Hide** to display the report options.
   b. To show a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your current selection.
   c. To designate a display column as a column by which to sort the report, click Add to sort.
   d. Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e. To divide the report by a specific criterion, select from the **Group By** item list.
   f. To narrow the scope of the report by date of certification issuance, specify dates in the fields.
   g. To narrow the scope of the report by date of certification expiration, specify dates in the fields.

5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

Certifications - By User (Basic)

This topic applies to the Basic Certification Component only. If you have the Advanced Certification Component enabled, please see Certifications - By User (Basic) on page 247.

The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

The Certifications - By User option shows you the certifications a user has earned, and it includes specific details of those certifications. It is a handy tool, because it allows you to see all of the certifications a user has earned, and how long the user has until the certification expires. It displays the certifications name, organization, completion date, and expiration date. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To work with a certifications - by user report:

1 Select **Reports > Certification Reports > Certifications -- By User > Hierarchy level**.
2 Select the check box for each sub-level of the selected Hierarchy level on which you wish to run a report.
3 Select a user from the list.
4 To customize your report:
   a Click **Show/Hide** to display the report options.
   b To show a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your current selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To narrow the scope of the report by date of certification issuance, specify dates in the fields.
   g To narrow the scope of the report by date of certification expiration, specify dates in the fields.
5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

View Program (Advanced)

This topic applies to the Advanced Certification Component only. If you do not have the Advanced Certification Component enabled, please see View Program (Basic) on page 248

The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use **Certifications Overview** to view which users have earned which certifications. All of the certifications earned by every user, the issuing organization, the completion date, and the expiration date are displayed. Information for all users and across all levels in the system is displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To work with a view program report:

1. Select **Reports > Certification Reports > View Program > Hierarchy level**.
2. Select the check box for each sub-level of the selected Hierarchy level on which you wish to run a report.
3. To customize your report:
   a. Click **Show/Hide** to display the report options.
   b. To show a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your current selection.
   c. To designate a display column as a column by which to sort the report, click Add to sort.
   d. Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e. To divide the report by a specific criterion, select from the **Group By** item list.
   f. To narrow the scope of the report by date of certification issuance, specify dates in the fields.
   g. To narrow the scope of the report by date of certification expiration, specify dates in the fields.
4. Click **Submit** to generate the report.
5. To export the report, select a format from the **Export** item list, and then click Export.

View Program (Basic)

This topic applies to the Basic Certification Component only. If you have the Advanced Certification Component enabled, please see View Program (Advanced) on page 248.

The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use **View Program** to view which users have earned which certifications. All of the certifications earned by every user, the issuing organization, the completion date, and the expiration date are displayed.

Information for all users and across all levels in the system is displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To work with a view program report:

1. Select **Reports > Certification Reports > View Program > Hierarchy level**.
2. Select the check box for each sub-level of the selected Hierarchy level on which you wish to run a report.
3. To customize your report:
   a. Click **Show/Hide** to display the report options.
   b. To show a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your current selection.
   c. To designate a display column as a column by which to sort the report, click Add to sort.
   d. Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e. To divide the report by a specific criterion, select from the **Group By** item list.
   f. To narrow the scope of the report by date of certification issuance, specify dates in the fields.
   g. To narrow the scope of the report by date of certification expiration, specify dates in the fields.
4. Click **Submit** to generate the report.
5. To export the report, select a format from the **Export** item list, and then click Export.

Certified Users (Advanced)

This topic applies to the Advanced Certification Component only. If you do not have the Advanced Certification Component enabled, please see Certified Users (Basic) on page 250

The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use **Certified Users** to view a list of users who have earned certifications in Infor Learning Management.

To work with a certified users report:

1. Select **Reports > Hierarchy level > Certification Reports > Certified Users**.
2. Select a certification.
3. Click **Submit** to run the report.
4. To export this report as an Excel spreadsheet, click Export to Excel.

Certified Users (Basic)

This topic applies to the Basic Certification Component only. If you have the Advanced Certification Component enabled, please see Certified Users (Advanced) on page 249.

The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use **Certified Users** to view a list of users who have earned certifications in Infor Learning Management.

To work with a certified users report:

1. Select **Reports > Hierarchy level > Certification Reports > Certified Users**.
2. Select a certification.
3. Click **Submit** to run the report.
4. To export this report as an Excel spreadsheet, click Export to Excel.

Certified Users - By Certification (Advanced)

This topic applies to the Advanced Certification Component only. If you do not have the Advanced Certification Component enabled, please see Certified Users - By Certification (Basic) on page 251

The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use **Certified Users - By Certification** to view all the users that have earned a particular certification. See who has earned a certain certification. You can use it to determine which users still need to get certified, and which users may need to get re-certified in the near future. It lists the user's name, issuing organization, completion date, and expiration date. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To work with a Certified Users - By Certification report:

1. Select **Reports > Certification Reports > Certified Users - By Certification > Hierarchy level**.
2. Select the check box for each sub-level of the selected Hierarchy level on which you wish to run a report.
3. Select a certification from the list.
4. To customize your report:
   a. Click **Show/Hide** to display the report options.
   b. To show a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your current selection.
   c. To designate a display column as a column by which to sort the report, click Add to sort.

d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
e To divide the report by a specific criterion, select from the **Group By** item list.
f To narrow the scope of the report by date of certification issuance, specify dates in the fields.
g To narrow the scope of the report by date of certification expiration, specify dates in the fields.

5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

Certified Users - By Certification (Basic)

This topic applies to the Basic Certification Component only. If you have the Advanced Certification Component enabled, please see Certified Users - By Certification (Advanced) on page 250.

The Advanced Certification Component is an optional module for Infor Learning Management. For additional information or to purchase the Advanced Certification Component, please contact your sales representative.

Use **Certified Users - By Certification** to view all the users that have earned a particular certification. See who has earned a certain certification. You can use it to determine which users still need to get certified, and which users may need to get re-certified in the near future. It lists the user’s name, issuing organization, completion date, and expiration date. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To work with a Certified Users - By Certification report:

1 Select **Reports > Certification Reports > Certified Users - By Certification > Hierarchy level**.
2 Select the check box for each sub-level of the selected Hierarchy level on which you wish to run a report.
3 Select a certification from the list.
4 To customize your report:
a Click **Show/Hide** to display the report options.
b To show a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your current selection.
c To designate a display column as a column by which to sort the report, click Add to sort.
d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
e To divide the report by a specific criterion, select from the **Group By** item list.
f To narrow the scope of the report by date of certification issuance, specify dates in the fields.
g To narrow the scope of the report by date of certification expiration, specify dates in the fields.

5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

Courses

There are several reports detailing activities in the system broken down by course and level in Infor Learning Management.

This table shows the courses reporting options:

Report	Description
Assign Chargeback on page 253	View total chargeback cost for an event.
Classroom Training Report on page 253	View a training report for classroom sessions.
Course/Event -- Cancelled Users on page 254	Select to view time period, method of cancellation and re-registration information for users who cancelled an event.
Evaluations -- Level 1 on page 254	View user responses to evaluations associated with a course.
Evaluations -- Level 2 on page 254	View the difference between the Pre- and Post-Assessment score for a user within a specified course.
Event -- Credit on page 256	Select to view all users, users with credit or users with no credit for a specified event.
Event -- Cancelled Enrollment on page 255	View the name, title, employee ID and level for users who cancelled their enrollment in an event.
Event -- Cost on page 255	View total cost of event items.
Event -- Enrollment Sheet on page 256	View the name, title, employee ID and level for users enrolled in an event.
Event -- Enrollment/Attendance on page 256	View enrollment, waiting list, cancelled enrollment and attendance credits for users of an event.
Event -- Waitlist on page 257	View all users who are on a waiting list for an event.
Scores -- By Module on page 257	View number of users, active users and averages of module scores for a selected course.
Scores -- By Question on page 257	View number of active users, total correct and ratio for each question within a selected course.
Scores -- By User on page 258	Presents an overview of all user scores.
Scores -- External Scores on page 258	View external test scores for all users within a selected course.
Scores -- Knowledge Gap on page 259	View possible points, user information and average score for courses that have a roadmap.
Scores -- Passing Scores on page 259	Define dates to view passing scores for users within a selected course.

Report	Description
Scores -- Percentages on page 259	Define date and passing score parameters to view scores for users within a selected course.
Sessions -- Not Started for Period on page 260	Set criteria to view a list of users who have not started a course within the specified time frame.
Sessions -- Overview on page 260	View sessions statistics for all users within a selected course.
Sessions -- Started for Period on page 260	Set criteria to view a list of users who started a course within the specified time frame.
Sessions -- User on page 260	View sessions statistics for a single user within a selected course.
Survey -- By User on page 261	View survey responses by user within a specified course.
Survey -- Essay on page 261	View essay response for a user within a specified course.
Survey -- Stats on page 261	View total survey response by all users within a specified course.

Assign Chargeback

Use **Assign Chargeback** to view charge back costs applied to courses in the selected level.

To view chargeback costs for a course:

1. Select **Reports > Hierarchy level > Courses > Assign Chargeback > Course name**.
2. Select a currency from the **Display Currency In** item list.
3. To export the report as an Excel spreadsheet, click Export to Excel.

Classroom Training Report

Use **Classroom Training Report** to view training reports for selected classroom courses.

To view a training report:

1. Select **Reports > Hierarchy level > Courses > Classroom Training Report**.
2. Specify a date range for the report.
3. Select a course.
4. Click **Submit**.
5. To export your report as an Excel spreadsheet click Export to Excel.

Course/Event -- Cancelled Users

Use **Course/Event -- Cancelled Users** to define criteria for the timing of a cancellation, the method of cancellation, and whether the user has re-registered for an event.

To view a cancelled users report

1. Select **Reports > Hierarchy level > Courses > Course/Event -- Cancelled Users > Course name**.
2. Select a course or event from the **Show cancelled users for** item list.
3. Select **Did not re-register**, **Re-registered** or **Both** from the **Show cancelled users who** item list.
4. Select **Administrator only**, **Self cancel only**, or **Both** from the **Show users cancelled by** item list.
5. Click **Show Report**.
6. To export this report as an Excel spreadsheet click Export to Excel.

Evaluations -- Level 1

Use **Evaluations -- Level 1** to view the results of course evaluations taken by users in the Infor Learning Management Portal or Infor Learning Management Learner.

The default response set for evaluation questions is 1 through 5, with 1 meaning "Strongly Disagree" and 5 meaning "Strongly Agree." Answers are displayed in this report as the numbers 1 through 5 and these numbers are averaged from all available user responses.

To create a course evaluations report:

1. Select **Reports > Hierarchy level > Courses > Evaluations -- Level 1 > Course name**.
2. Specify a date range for the report.
3. Select an evaluation from the **Please pick a Level 1 Evaluation from the list to view** item list.
4. To filter your report, select an event from the **Filter results by event** item list.
5. Click **Show**.
6. To view the actual text of a question, move the pointer over that question's number in the report table.
7. To export your report as an Excel spreadsheet click Export to Excel.

Evaluations -- Level 2

Use **Evaluations -- Level 2** to view the difference between a user’s pre and post assessment results by course.

- If your course was developed with pre and post assessment modules, you can review the comparative results to determine the level of improvement that was achieved by users.
- Points are equivalent to question weights.

To view user pre and post assessment results:

1. Select **Reports > Hierarchy level > Courses > Evaluations -- Level 2 > Course name**.
2. Specify a date range.
3. To filter your report, select an event from the **Filter results by event** item list.
4. Click **Show**.
5. To export your report as an Excel spreadsheet click Export to Excel.

Event -- Cancelled Enrollment

Use **Event -- Cancelled Enrollment** to view a list of users that have canceled their enrollment for a selected classroom-based event.

To view cancelled enrollment:

1. Select **Reports > Hierarchy level > Courses > Event -- Cancelled Enrollment > Course name**.
2. Specify a date range for the report.
3. To search for archived events:
   a. Select the **Check here to include archived events that fall within the date range** check box.
   b. Click **Search**.
4. Select an event from the **Please select an event** item list.
5. To export this report as an Excel spreadsheet, click Export to Excel.

Event -- Cost

Use **Event -- Cost** to view the costs associated with conducting a classroom-based event.

For this report to be generated, line item costs must be specified.

To view costs for a classroom-based event:

1. Select **Reports > Hierarchy level > Courses > Event -- Cost > Course name**.
2. Specify a date range for the report.
3. To search for archived events:
   a. Select **Check here to include archived events that fall within the date range**.
   b. Click **Search**.
4. Select event.
5. Select currency.
6. To export this report as an Excel spreadsheet, click Export to Excel.

Event -- Credit

Use **Event -- Credit** to view a list of users who have been given credit for attending a selected event.

To view users that have credit for an event:

1. Select **Reports > Hierarchy level > Courses > Event -- Credit > Course name**.
2. Specify a date range.
3. To search for archived events:
   a. Select the **Check here to include archived events that fall within the date range** check box.
   b. Click **Search**.
4. Select an event from the **Please select an event** item list.
5. To filter your results, click the **All**, **Credit** or **No Credit** radio button.
6. To export this report as an Excel spreadsheet, click Export to Excel.

Event -- Enrollment Sheet

Use **Event -- Enrollment Sheet** to view a list of registered users for a selected classroom-based event.

To view registered users for an event:

1. Select **Reports > Hierarchy level > Courses > Event -- Enrollment Sheet > Course name**.
2. Specify a date range.
3. Select an event from the **Please select an event** item list.
4. To search for archived events:
   a. Check the **Check here to include archived events that fall within the date range** check box.
   b. Click **Search**.
5. To export this report as an Excel spreadsheet, click Export to Excel.

Event -- Enrollment/Attendance

Use **Event -- Enrollment/Attendance** to combine the reports for the **Event -- Enrollment Sheet**, **Cancelled Enrollment**, **Credit** and **Wait List** options in one report.

To create an Event -- Enrollment/Attendance report:

1. Select **Reports > Hierarchy level > Courses > Event -- Enrollment/Attendance > Course name**.
2. Specify a date range.
3. To search for archived events:
   a. Select the **Check here to include archived events that fall within the date range** check box.

b Click **Search**.

4 Select an event from the **Please select an event** item list.
5 To export this report as an Excel spreadsheet, click Export to Excel.

Event -- Waitlist

Use **Event -- Waitlist** to view a list of users currently on the wait list for a selected classroom-based event.

To view and event wait list:

1 Select **Reports > Hierarchy level > Courses > Event -- Waitlist > Course name**.
2 Specify a date range.
3 To search for archived events:
   a Select the **Check here to include archived events that fall within the date range** check box.
   b Click **Search**.
4 Select an event from the **Please select an event** item list.
5 To export this report as an Excel spreadsheet, click Export to Excel.

Scores -- By Module

Use **Scores -- By Module** to view assessment module scores for a selected course. Information in the report includes: Environment, Module, Total Users, Active Users, Avg Score, Min Score, Max Score, Min Wgt Score and Max Wgt Score.

Only scores for assessment modules are displayed. Course completion criteria is not displayed. Scores for courses associated with the resetting of certification programs will not be displayed on this report until the user earns new scores.

To view assessment module scores:

1 Select **Reports > Hierarchy level > Courses > Scores -- By Module > Course name**.
2 To filter your report, select an event from the **Filter results by event** item list.
3 To export your report as an Excel spreadsheet click Export to Excel.

Scores -- By Question

Use **Scores -- By Question** to view individual assessment question statistics for all users in a given course. Information in the report includes: Environment, Module, Question, Active Users, Total Correct, and Ratio.

To view scores by question:

1 Select **Reports > Hierarchy level > Courses > Scores -- By Question > Course name**.
2 To filter your report, select an event from the **Filter results by event** item list.
3 To export your report as an Excel spreadsheet click Export to Excel.

Scores -- By User

Use **Scores -- By User** to view assessment module scores for a selected course. Information in the report includes: Environment, Module Name, User Name, Total Questions, Correct, Total Weight, Total Score, Passing Score and Last Taken.

Only scores for assessment modules are displayed and course completion criteria is not displayed. Scores for courses associated with the resetting of certification programs will not be displayed on this report until the user earns new scores.

To view assessment module scores:

1 Select **Reports > Hierarchy level > Courses > Scores -- By User > Course name**.
2 To filter your report, choose an event from the **Filter results by event** item list.
3 To export your report as an Excel spreadsheet click Export to Excel.

Scores -- External Scores

Use **Scores -- External Scores** to view test results for examinations given outside an Infor Learning Management course .

To generate this report, external test results must be logged into the system.

External tests are used to record final scores for SCORM courses. When a user earns a final score in a SCORM course the score is automatically recorded as an external test score.

To view scores for external tests:

1 Select **Reports > Hierarchy level > Courses > Scores -- External Scores > Course name**.
2 Specify a date range.
3 To search for archived events:
   a Select the **Check here to include archived events that fall within the date range** check box.
   b Click **Search**.
4 Select an event from the **Please select an event** item list.
5 Select a test from the **Please select a test** item list.
6 To export your report as an Excel spreadsheet click Export to Excel.

Scores -- Knowledge Gap

Use **Scores -- Knowledge Gap** to view how well users understand the concepts taught within each Infor Learning Management module by comparing their pre-assessment and post-assessment scores.

To generate a Knowledge Gap report, the course author must have used the Roadmap feature when developing the course.

To view the knowledge gap report:

1. Select **Reports > Hierarchy level > Courses > Scores -- Knowledge Gap > Course name**.
2. Specify a date range.
3. To filter your report, choose an event from the **Filter results by event** item list.
4. To export your report as an Excel spreadsheet click Export to Excel.

Scores -- Passing Scores

Use **Scores -- Passing Scores** to view a list of course users who have passed a post-assessment for a selected course.

This report will not be generated unless the selected course contains a post-assessment test. Scores for courses associated with reset certification programs will not be displayed on this report until the user earns new scores.

To view passing scores:

1. Select **Reports > Hierarchy level > Courses > Scores -- Passing Scores > Course name**.
2. Specify a date range.
3. To filter your report, choose an event from the **Filter results by event** item list.
4. Click **Submit** to generate the report.
5. To export your report as an Excel spreadsheet click Export to Excel.

Scores -- Percentages

Use **Scores -- Percentages** to view users who scored below or above a specified post-assessment score for a selected course.

The final score for the selected course is displayed for each user. Scores for courses associated with reset certification programs will not be displayed on this report until the user earns new scores.

To view the Scores -- Percentages report:

1. Select **Reports > Hierarchy level > Courses > Scores -- Percentages > Course name**.
2. Specify a date range.
3. Specify a score value to determine which users are displayed.
4. To filter your report, choose an event from the **Filter results by event** item list.

5 Click **Submit** to generate the report.
6 To export your report as an Excel spreadsheet click Export to Excel.

Sessions -- Not Started for Period

Use **Sessions -- Not Started for Period** to view users who have not started a selected course within a specified time period.

To view users who have not started a course:

1 Select **Reports > Hierarchy level > Courses > Sessions -- Not Started for Period > Course name**.
2 Specify a date range.
3 Click **Submit** to generate the report.
4 To export your report as an Excel spreadsheet click Export to Excel.

Sessions -- Overview

Use **Sessions -- Overview** to view session statistics for a selected course.

To view session statistics:

1 Select **Reports > Hierarchy level > Courses > Sessions -- Overview > Course name**.
2 To export your report as an Excel spreadsheet click Export to Excel.

Sessions -- Started for Period

Use **Sessions -- Started for Period** to view users who have started a selected course but have not yet completed either the pre or post assessment within a given date range.

To view the Sessions -- Started for Period report:

1 Select **Reports > Hierarchy level > Courses > Sessions -- Started for Period > Course name**.
2 Specify a date range.
3 Click **Submit** to generate the report.
4 To export your report as an Excel spreadsheet click Export to Excel.

Sessions -- User

Use **Sessions -- User** to view session information for all users of a selected course. Information such as Users, Sessions, and Time Online are displayed.

To view session information for all users of a course:

1. Select **Reports > Hierarchy level > Courses > Sessions -- User > Course name**.
2. To export your report as an Excel spreadsheet click Export to Excel.

Survey -- By User

Use **Survey -- By User** to view a selected user's replies to survey questions that are part of the online evaluation for a course.

To view survey question replies by user:

1. Select **Reports > Hierarchy level > Courses > Survey -- By User > Course name**.
2. Specify a date range.
3. To filter your report, select an event from the **Filter results by event** item list.
4. Select a user from the **User** item list.
5. Select a survey from the **Survey** item list.
6. To export your report as an Excel spreadsheet click Export to Excel.

Survey -- Essay

Use **Survey -- Essay** to view cumulative results of survey essay questions that are part of the online evaluation for a given course.

To view cumulative survey results:

1. Select **Reports > Hierarchy level > Courses > Survey -- Essay > Course name**.
2. Specify a date range.
3. To filter your report, select an event from the **Filter results by event** item list.
4. Select a survey from the **Survey** item list.
5. To export your report as an Excel spreadsheet click Export to Excel.

Survey -- Stats

Use **Survey -- Stats** to view cumulative results of survey questions, such as multiple choice, multiple multiple choice and item list questions, that are part of the online evaluation for a given course.

To view cumulative survey question results:

1. Select **Reports > Hierarchy level > Courses > Survey -- Stats > Course name**.
2. Specify a date range.
3. Select a survey from the **Please pick a survey from the list to view** item list.

4 To filter your report, select an event from the **Filter results by event** item list.
5 Click **Show**.
6 To export your report as an Excel spreadsheet click Export to Excel.

Curricula Reports

There are three reports detailing curricula completion activities in the system. Curricula are associated with courses. Information regarding users that have completed curricula in the system is displayed.

This table shows the curricula reporting options:

Report	Description
Curriculum Completion -- By Curriculum on page 263	View all of the users that have completed a particular curriculum.
Curriculum Completion -- By User on page 263	View all of the curricula that a particular user has completed.
Curriculum Completion -- Overview on page 264	View all curricula that has been completed by all users in the selected level.
Curriculum Sessions -- by Course on page 262	View session information for each course within a selected curriculum.
Curriculum Sessions -- By Users on page 262	View user sessions within a selected curriculum.

Curriculum Sessions -- by Course

Use **Curriculum Sessions -- by Course** to view session information for each course within a selected curriculum.

To view session information for courses with a curriculum:

1 Select **Reports > Hierarchy level > Curricula > Curriculum Sessions -- By Course > Curriculum name**.
2 To export this report as an Excel spreadsheet, click Export to Excel.

Curriculum Sessions -- By Users

Use **Curriculum Sessions -- By Users** to view user sessions within a selected curriculum.

To view user sessions within a curriculum:

1 Select **Reports > Hierarchy level > Curricula > Curriculum Sessions -- By Users > Curriculum name**.
2 To export this report as an Excel spreadsheet, click Export to Excel.

Curriculum Completion -- By Curriculum

Use **Curriculum Completion -- By Curriculum** to view all of the users that have completed a particular curriculum. This report can serve as a sort of roster for users that have completed a given curriculum. By default, the Course Name, Course Classification, Curriculum Completion available credits, Curriculum Completion earned credits, Score, Assessment Type, Passing Score, Date Scored, Total Sessions, and Time Online are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view users that have completed a curriculum:

1 Select **Reports > Curricula Reports > Curriculum Completion -- By Curriculum > Hierarchy level**.
2 Select the checkbox for sub-levels on which you want to run the report.
3 Select a curriculum.
4 To customize your report:
   a Click **Show/Hide**.
   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To view users that exist only in the selected Hierarchy levels, select the **Level User Filter** check box.
   g To view curricula that exist only in the selected Hierarchy levels, select the **Level Curriculum Filter** check box.
5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

Curriculum Completion -- By User

Use **Curriculum Completion -- By User** to view all of the curricula that a specific user has completed. This gives you a view of the users training progress. By default, the Course Name, Course Classification, Curriculum Completion available credits, Curriculum Completion earned credits, Score, Assessment Type, Passing Score, Date Scored, Total Sessions, and Time Online are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view curricula that a certain user has completed:

1. Select **Reports > Curricula Reports > Curriculum Completion -- By User > Hierarchy level**.
2. Select the checkbox for sub-levels on which you want to run the report.
3. Select a curriculum.
4. To customize your report:
   a. Click **Show/Hide**.
   b. To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c. To designate a display column as a column by which to sort the report, click Add to sort.
   d. Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e. To divide the report by a specific criterion, select from the **Group By** item list.
   f. To view users that exist only in the selected Hierarchy levels, select the **Level User Filter** check box.
   g. To view curricula that exist only in the selected Hierarchy levels, select the **Level Curriculum Filter** check box.
5. Click **Submit** to generate the report.
6. To export the report, select a format from the **Export** item list, and then click Export.

Curriculum Completion -- Overview

Use **Curriculum Completion -- Overview** to view all of the curricula that all users in a level have completed. You can view your users' training progress. By default, the Curriculum Name, Curriculum Completion Required Credits, User Name, and User Completion Status are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view all curricula that all users have completed:

1. Select **Reports > Curricula Reports > Curriculum Completion -- Overview > Hierarchy level**.
2. Select the checkbox for sub-levels on which you want to run the report.
3. Select a curriculum.
4. To customize your report:

a Click **Show/Hide**.
b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
c To designate a display column as a column by which to sort the report, click Add to sort.
d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
e To divide the report by a specific criterion, select from the **Group By** item list.
f To view users that exist only in the selected Hierarchy levels, select the **Level User Filter** check box.
g To view curricula that exist only in the selected Hierarchy levels, select the **Level Curriculum Filter** check box.

5. Click **Submit** to generate the report.
6. To export the report, select a format from the **Export** item list, and then click Export.

e-Meetings

There are three reports detailing activities related to e-Meetings.

This table shows the e-Meetings reporting options:

Report	Description
E-Meeting Attendance on page 265	View all users who attended an e-Meeting and the times they joined the e-Meeting.
E-Meeting Calendar on page 266	View a calendar of all scheduled e-Meetings.
Event -- e-Meeting Attendance on page 266	View all users who attended an e-Meeting by event.

E-Meeting Attendance

Use **e-Meeting Attendance** to view attendance and session information for ad-hoc or organized ad-hoc e-meetings created in a portal or via Infor Learning Management Administrator.

To view e-Meeting attendance and session information:

1. Select **Reports > Hierarchy level > e-Meetings > e-Meeting Attendance > e-Meeting name**.
2. To export this report as an Excel spreadsheet, click Export to Excel.

E-Meeting Calendar

Use **e-Meeting Calendar** to view all scheduled e-meetings in a calendar format. Depending on the selected level, all e-meetings created at that level and below are displayed.

To view scheduled e-Meetings:

1. Select **Reports > Hierarchy level > e-Meetings > e-Meeting Calendar**.
2. To view an e-Meeting's details, click the e-meeting's name in the calendar.
3. To export the calendar as an Excel spreadsheet, click Export to Excel.

Event -- e-Meeting Attendance

Use **Event -- e-Meeting Attendance** to view attendance and session information for e-meetings that are scheduled as part of an event. Information for ad-hoc or organized ad-hoc e-meetings is not displayed.

To view attendance and session information for event e-Meetings:

1. Select **Reports > Hierarchy level > e-Meetings > Event -- e-Meeting Attendance > Course name**.
2. Specify a date range.
3. Click **Search**.
4. Select an event from the **Please select an event** item list.
5. Select an e-Meeting from the **Please select a meeting** item list.
6. To export this report as an Excel spreadsheet, click Export to Excel.

Event Reports

There are two reports that you can use to view information about event enrollment.

This table shows the Event Reports reporting options:

Report	Description
Enrollment -- By Course on page 267	View enrollment by event name.
Enrollment -- By User on page 267	View enrollment status for all courses by user name.

Enrollment -- By Course

Use **Enrollment -- By Course** to view which users are enrolled in a particular course event. You can use it as a class roster for the event. Users that are enrolled for the course event, the name of the event, and the date they enrolled for the event are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view user enrollment for a course:

1 Select **Reports > Event Reports > Enrollment -- By Course > Hierarchy level**.
2 Select the checkbox for sub-levels on which you want to run the report.
3 Select a course.
4 To customize your report:
   a Click **Show/Hide**.
   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To narrow the scope of the report by date, specify dates.
   g To view which events users are enrolled in, select the **Enrolled** check box.
   h To display events which users are waitlisted for, select the **Waitlisted** check box.
   i To display events which users have canceled for, select the **Canceled** check box.
   j Select an event from the **Event** item list.
5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

Enrollment -- By User

Use **Enrollment -- By User** to view all of the course events a user is enrolled in. You can use it as a class schedule for the user. The courses & events in which the student is enrolled, the user's status in those courses & events, and the date of enrollment are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view all courses in which a user is enrolled:

1 Select **Reports > Event Reports > Enrollment -- By User > Hierarchy level**.

2 Select the checkbox for sub-levels on which you want to run the report.
3 Select a user.
4 To customize your report:
   a Click **Show/Hide**.
   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To narrow the scope of the report by date, specify dates.
   g To view which events users are enrolled in, select the **Enrolled** check box.
   h To display events which users are waitlisted for, select the **Waitlisted** check box.
   i To display events which users have canceled for, select the **Canceled** check box.
   j Select an event from the **Event** item list.
5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

Level Reports

There is one level report where information about the users that reside within that level is displayed.

This table shows the Level Reports reporting options:

Report	Description
Level Roster Report on page 268	View users by level.

Level Roster Report

Use **Level Roster Report** to view all the users that reside in a particular level and get an overview of a level's users. You can use this report to update and maintain your levels. Each user's first name, last name, login name, e-mail address, active status, and date registered are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

To view all users on a level:

1 Select **Reports > Level Reports > Level Roster Report > Hierarchy level**.
2 Select the checkbox for sub-levels on which you want to run the report.
3 Select a user.
4 To customize your report:

a Click **Show/Hide**.
b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
c To designate a display column as a column by which to sort the report, click Add to sort.
d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
e To divide the report by a specific criterion, select from the **Group By** item list.

5 Click **Submit** to generate the report.

6 To export the report, select a format from the **Export** item list, and then click Export.

Score Reports

There are several reports you can use to examine your users' success in understanding their course material. You can view this data based on the users overall course score, Infor Learning Management assessment scores, and external assessment scores. You can even view a breakdown of the Infor Learning Management assessment scores by test question.

This table shows the Level Reports reporting options:

Report	Description
Course Scores -- By Course on page 270	View course scores by course.
Course Scores -- By User on page 271	View course scores by user.
Course Scores -- Overview on page 271	View an overview of course scores.
External Assessment Scores -- By Course on page 272	View all of the external assessment scores all users earned for a particular course.
External Assessment Scores -- By User on page 273	View all of the external assessment scores that a user earned in all courses.
External Assessment Scores -- Overview on page 273	View a complete overview of external assessment scores.
Score Summary -- By Course on page 274	View a summary of all user assessment scores for a course.
Score Summary -- By User on page 275	View a summary of a user's assessment scores.
Score Summary -- Overview on page 276	View a summary overview of scoring history.
ILM Assessment Scores -- By Course on page 276	View the Infor Learning Management assessment scores all users earned for a particular course.
ILM Assessment Scores -- By User on page 277	View all of the Infor Learning Management assessment scores that a user earned in all courses.

Report	Description
ILM Assessment Scores -- Overview on page 278	View all users' Infor Learning Management Assessment Scores for all courses.
ILM Pre vs. Post Assessment -- By Course on page 279	View a comparison of users' pre and post assessment scores for a particular course.
ILM Question Scores -- By Course on page 279	View Infor Learning Management question scores by course.
ILM Question Scores -- By User on page 280	View Infor Learning Management question scores by user.

Course Scores -- By Course

Use **Course Scores -- By Course** to compare how different users have done in a particular course. View the overall course scores and the assessment scores. The user name, passing score, user score, date scored, and the amount of credits earned are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view overall course scores:

1. Select **Reports > Score Reports > Course Scores -- By Course > Hierarchy level**.
2. Select the checkbox for sub-levels on which you want to run the report.
3. Select a course.
4. To customize your report:
   a. Click **Show/Hide**.
   b. To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c. To designate a display column as a column by which to sort the report, click Add to sort.
   d. Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e. To divide the report by a specific criterion, select from the **Group By** item list.
   f. To only view users corresponding to the selected Hierarchy levels, select the **Level User Filter** check box.
5. Click **Submit** to generate the report.
6. To export the report, select a format from the **Export** item list, and then click Export.

Course Scores -- By User

Use **Course Scores -- By User** to view how a user has done in his or her courses. This report includes assessment scores, along with the overall course scores. The user's courses, passing score, user score, date scored, and the amount of credits earned are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view a particular user's scores:

1 Select **Reports > Score Reports > Course Scores -- By User > Hierarchy level**.
2 Select the checkbox for sub-levels on which you want to run the report.
3 Select a user.
4 To customize your report:
   a Click **Show/Hide**.
   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To only view courses corresponding to the selected Hierarchy levels, select the **Level Course Filter** check box.
5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

Course Scores -- Overview

Use **Course Scores -- Overview** to view a comprehensive look at the scores of all users in all of their courses. The course names, user names, passing score, user scores, date scored, and credits earned are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view all course scores for all users:

1 Select **Reports > Score Reports > Course Scores -- Overview > Hierarchy level**.
2 Select the checkbox for sub-levels on which you want to run the report.
3 To customize your report:
   a Click **Show/Hide**.

   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To only view users corresponding to the selected Hierarchy levels, select the **Level User Filter** check box.

4. Click **Submit** to generate the report.
5. To export the report, select a format from the **Export** item list, and then click Export.

External Assessment Scores -- By Course

Use **External Assessment Scores -- By Course** to gauge the effectiveness of a particular non Infor Learning Management course. Compare how the users of a classroom course or a third-party online SCORM course have scored on the external assessments. The user names, event name, external test name, assessment type, passing score, user score, and date scored are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view scores for external course assessments:

1. Select **Reports > Score Reports > External Assessment Scores -- By Course > Hierarchy level**.
2. Select the checkbox for sub-levels on which you want to run the report.
3. Select a course.
4. To customize your report:
   a Click **Show/Hide**.
   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To narrow the scope of the report by date, specify dates.
   g To narrow the scope of the report by score, specify score values.
   h To view user scores for each attempt of a single assessment, select the **Score history** check box. To view only user scores for the most recent attempt, clear the **Score history** check box.
   i To select which types of assessment to include in the report, select or clear the **Normal Assessment**, **Pre Assessment**, and **Post Assessment** check boxes.

5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

External Assessment Scores -- By User

Use **External Assessment Scores -- By User** to view how successful a user has been in understanding non Infor Learning Management course material. It is very similar to Course Scores -- By User on page 271. This report differs in it's inclusion of test scores that are earned in a classroom setting or through a third-party online SCORM course. The course name, event name, external test name, assessment type, passing score, user score, and date scored are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view a particular user's scores for all external courses:

1 Select **Reports > Score Reports > External Assessment Scores -- By User > Hierarchy level**.
2 Select the checkbox for sub-levels on which you want to run the report.
3 Select a user.
4 To customize your report:
   a Click **Show/Hide**.
   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To narrow the scope of the report by date, specify dates.
   g To narrow the scope of the report by score, specify score values.
   h To view user scores for each attempt of a single assessment, select the **Score history** check box. To view only user scores for the most recent attempt, clear the **Score history** check box.
   i To select which types of assessment to include in the report, select or clear the **Normal Assessment**, **Pre Assessment**, and **Post Assessment** check boxes.
5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

External Assessment Scores -- Overview

Use **External Assessment Scores -- Overview** to get a comprehensive view of the external assessment scores. The recorded external test scores that every user has earned in every classroom or third-party online SCORM course is displayed, as well as the user names, course names, event names, external test names, assessment types, passing scores, user scores, and the date scored. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view all external assessment scores for all users:

1. Select **Reports > Score Reports > External Assessment Scores -- Overview > Hierarchy level**.
2. Select the checkbox for sub-levels on which you want to run the report.
3. To customize your report:
   a. Click **Show/Hide**.
   b. To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c. To designate a display column as a column by which to sort the report, click Add to sort.
   d. Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e. To divide the report by a specific criterion, select from the **Group By** item list.
   f. To narrow the scope of the report by date, specify dates.
   g. To narrow the scope of the report by score, specify score values.
   h. To view user scores for each attempt of a single assessment, select the **Score history** check box. To view only user scores for the most recent attempt, clear the **Score history** check box.
   i. To select which types of assessment to include in the report, select or clear the **Normal Assessment**, **Pre Assessment**, and **Post Assessment** check boxes.
4. Click **Submit** to generate the report.
5. To export the report, select a format from the **Export** item list, and then click Export.

Score Summary -- By Course

Use **Score Summary -- By Course** to measure the effectiveness of a particular course. It differs from ILM Assessment Scores -- By Course on page 276 & External Assessment Scores -- By Course on page 272, in that it covers all test scores and module scores, regardless of the type of course. You can measure and compare the success of all the users who took the course. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view all test and module scores:

1. Select **Reports > Score Reports > Score Summary -- By Course > Hierarchy level**.
2. Select the checkbox for sub-levels on which you want to run the report.
3. Select a course.

4 To customize your report:
   a Click **Show/Hide**.
   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To narrow the scope of the report by date, specify dates.
   g To narrow the scope of the report by score, specify score values.
   h To display credit a user has earned, select the **Event Credit/All Modules Complete** check box.
5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

Score Summary -- By User

Use **Score Summary -- By User** to view how well a user has scored in all of his or her courses. You can get a view of the scores earned in the courses measured against the required passing score. The course names, external test names, user scores, and passing scores are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view a particular user's scores for all courses:

1 Select **Reports > Score Reports > Score Summary -- By User > Hierarchy level**.
2 Select the checkbox for sub-levels on which you want to run the report.
3 Select a user.
4 To customize your report:
   a Click **Show/Hide**.
   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To narrow the scope of the report by date, specify dates.
   g To narrow the scope of the report by score, specify score values.
   h To display credit a user has earned, select the **Event Credit/All Modules Complete** check box.

5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

Score Summary -- Overview

Use **Score Summary -- Overview** to see all of the scores earned by all users, for all courses. It is one of the most comprehensive Score Reports in Infor Learning Management Dynamic Reports, as it does not discriminate among the different course event types. The course name, the test or module name, assessment type, the user score, and the passing score are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view all scores for all users:

1 Select **Reports > Score Reports > Score Summary -- Overview > Hierarchy level**.
2 Select the checkbox for sub-levels on which you want to run the report.
3 To customize your report:
   a Click **Show/Hide**.
   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To narrow the scope of the report by date, specify dates.
   g To narrow the scope of the report by score, specify score values.
   h To display credit a user has earned, select the **Event Credit/All Modules Complete** check box.
4 Click **Submit** to generate the report.
5 To export the report, select a format from the **Export** item list, and then click Export.

ILM Assessment Scores -- By Course

Use **ILM Assessment Scores -- By Course** to gauge the effectiveness of a particular Infor Learning Management course. You can compare the Infor Learning Management assessment scores of all users in a particular course. The user name, environment name, module name, assessment type, total questions, answered correctly, passing score, user score, and date scored are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view all assessment scores for an ILM course:

1 Select **Reports > Score Reports > ILM Assessment Scores -- By Course > Hierarchy level**.
2 Select the checkbox for sub-levels on which you want to run the report.
3 Select a course.
4 To customize your report:
   a Click **Show/Hide**.
   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To narrow the scope of the report by date, specify dates.
   g To narrow the scope of the report by score, specify score values.
   h To view user scores for each attempt of a single assessment, select the **Score history** check box. To view only user scores for the most recent attempt, clear the **Score history** check box.
   i To select which types of assessment to include in the report, select or clear the **Normal Assessment**, **Pre Assessment**, and **Post Assessment** check boxes.
   j To display visited pages for tracked content, select the **Tracked Content** check box.
5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

ILM Assessment Scores -- By User

Use **ILM Assessment Scores -- By User** to view how successful a user has been in understanding Infor Learning Management course material. You can compare all of the Infor Learning Management assessment scores a single user has earned in his or her courses. The user's courses, assessment scores, passing assessment score, and number of correct answers are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view all ILM assessment scores for a particular user:

1 Select **Reports > Score Reports > ILM Assessment Scores -- By User > Hierarchy level**.
2 Select the checkbox for sub-levels on which you want to run the report.
3 Select a user.
4 To customize your report:

a. Click **Show/Hide**.
b. To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
c. To designate a display column as a column by which to sort the report, click Add to sort.
d. Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
e. To divide the report by a specific criterion, select from the **Group By** item list.
f. To narrow the scope of the report by date, specify dates.
g. To narrow the scope of the report by score, specify score values.
h. To view user scores for each attempt of a single assessment, select the **Score history** check box. To view only user scores for the most recent attempt, clear the **Score history** check box.
i. To select which types of assessment to include in the report, select or clear the **Normal Assessment**, **Pre Assessment**, and **Post Assessment** check boxes.
j. To display visited pages for tracked content, select the **Tracked Content** check box.

5. Click **Submit** to generate the report.
6. To export the report, select a format from the **Export** item list, and then click Export.

ILM Assessment Scores -- Overview

Use **ILM Assessment Scores -- Overview** to get a comprehensive view of all the Infor Learning Management assessment scores. You can see all of the scores that every user has earned in all of their courses. The course name, environment name, module name, assessment type, total questions, passing score, user score, and date scored are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view all ILM assessment scores for all users:

1. Select **Reports > Score Reports > ILM Assessment Scores -- Overview > Hierarchy level**.
2. Select the checkbox for sub-levels on which you want to run the report.
3. To customize your report:

a. Click **Show/Hide**.
b. To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
c. To designate a display column as a column by which to sort the report, click Add to sort.
d. Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
e. To divide the report by a specific criterion, select from the **Group By** item list.
f. To narrow the scope of the report by date, specify dates.
g. To narrow the scope of the report by score, specify score values.

h To view user scores for each attempt of a single assessment, select the **Score history** check box. To view only user scores for the most recent attempt, clear the **Score history** check box.

i To select which types of assessment to include in the report, select or clear the **Normal Assessment**, **Pre Assessment**, and **Post Assessment** check boxes.

j To display visited pages for tracked content, select the **Tracked Content** check box.

4. Click **Submit** to generate the report.
5. To export the report, select a format from the **Export** item list, and then click Export.

ILM Pre vs. Post Assessment -- By Course

Use **ILM Pre vs. Post Assessment -- By Course** to gauge the effectiveness of your Infor Learning Management courses, by looking at the gap between the Pre and Post- Assessment scores. You can compare users' Pre and Post-Assessment Scores for a single course. The score for each assessment, and the difference between these scores are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view the gap between the Pre and Post- Assessment scores for an ILM course:

1. Select **Reports > Score Reports > Hierarchy level > ILM Pre vs. Post Assessment -- By Course**.
2. Select the checkbox for sub-levels on which you want to run the report.
3. Select a course.
4. To customize your report:

   a Click **Show/Hide**.

   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.

   c To designate a display column as a column by which to sort the report, click Add to sort.

   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.

   e To divide the report by a specific criterion, select from the **Group By** item list.
5. Click **Submit** to generate the report.
6. To export the report, select a format from the **Export** item list, and then click Export.

ILM Question Scores -- By Course

Use **ILM Question Scores -- By Course** to break down assessment scores and view how users faired on individual questions in a specific course. It is a great way to see how users scored as they did. You can also identify problematic questions or course material. Course name, page name, correct, question weight, and weighted score are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view all assessment question scores for a course:

1. Select **Reports > Score Reports > ILM Question Scores -- By Course > Hierarchy level**.
2. Select the checkbox for sub-levels on which you want to run the report.
3. Select a course.
4. To customize your report:
   a. Click **Show/Hide**.
   b. To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c. To designate a display column as a column by which to sort the report, click Add to sort.
   d. Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e. To divide the report by a specific criterion, select from the **Group By** item list.
   f. To view only modules of a certain type, select from the **Module** item list.
5. Click **Submit** to generate the report.
6. To export the report, select a format from the **Export** item list, and then click Export.

ILM Question Scores -- By User

Use **ILM Question Scores -- By User** to break down assessment scores and view how a user faired on individual questions in a specific course. You can examine an individual's course success or failure. Course name, environment name, module name, page name, correct, question weight, and weighted score are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view all assessment question scores for a user:

1. Select **Reports > Score Reports > ILM Question Scores -- By User > Hierarchy level**.
2. Select the checkbox for sub-levels on which you want to run the report.
3. Select a user.
4. To customize your report:
   a. Click **Show/Hide**.
   b. To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.

c To designate a display column as a column by which to sort the report, click Add to sort.
d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
e To divide the report by a specific criterion, select from the **Group By** item list.

5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

Session Reports

There are several reports that you can use to examine the amount if time that users spend in their courses in Infor Learning Management. You can view this information by user, course, or curriculum.

This table shows the Session Reports reporting options:

Report	Description
Curriculum Online Course Sessions -- By User on page 281	View all curriculum course session statistics for a user.
Curriculum Online Course Sessions -- Overview on page 282	View curriculum online course session overview.
Online Course Sessions -- By User on page 283	View all course session statistics for a user.
Online Sessions -- Overview on page 283	View online session overview.
Online User Sessions -- By Course on page 284	View session statistics for all users in a course.
User Online Course Sessions -- By Curriculum on page 285	View curriculum session statistics for all users in a curriculum.

Curriculum Online Course Sessions -- By User

Use **Curriculum Online Course Sessions -- By User** to see how much time a user is spending in his or her curriculum courses. The report is broken down by curriculum, and then by course. The curriculum name, course name, total sessions, time online, average session duration, last name, and first name are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view how much time a user is spending on their curriculum courses:

1 Select **Reports > Session Reports > Curriculum Online Course Sessions -- By User > Hierarchy level**.

2. Select the checkbox for sub-levels on which you want to run the report.
3. Select a user.
4. To customize your report:
   a. Click **Show/Hide**.
   b. To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c. To designate a display column as a column by which to sort the report, click Add to sort.
   d. Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e. To divide the report by a specific criterion, select from the **Group By** item list.
   f. To narrow the scope of the report by date, specify a date.
5. Click **Submit** to generate the report.
6. To export the report, select a format from the **Export** item list, and then click Export.

Curriculum Online Course Sessions -- Overview

Use **Curriculum Online Course Sessions -- Overview** to get a broad view of how much time users are spending in their curriculum courses. The course name, total sessions, time online, and average session duration are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view how much time all users are spending on their curriculum courses:

1. Select **Reports > Session Reports > Curriculum Online Course Sessions -- Overview > Hierarchy level**.
2. Select the checkbox for sub-levels on which you want to run the report.
3. To customize your report:
   a. Click **Show/Hide**.
   b. To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c. To designate a display column as a column by which to sort the report, click Add to sort.
   d. Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e. To divide the report by a specific criterion, select from the **Group By** item list.
   f. To narrow the scope of the report by date, specify a date.
4. Click **Submit** to generate the report.
5. To export the report, select a format from the **Export** item list, and then click Export.

Online Course Sessions -- By User

Use **Online Course Sessions -- By User** to view the amount of time a user spends in his or her courses. It can be used as a tracking tool. It is helpful in monitoring an individual's use of Infor Learning Management. The number of sessions, the length of the sessions, and the average session length per course is displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view how much time a particular user spent on online course sessions:

1. Select **Reports > Session Reports > Online Course Sessions -- By User > Hierarchy level**.
2. Select the checkbox for sub-levels on which you want to run the report.
3. Select a user.
4. To customize your report:
   a. Click **Show/Hide**.
   b. To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c. To designate a display column as a column by which to sort the report, click Add to sort.
   d. Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e. To divide the report by a specific criterion, select from the **Group By** item list.
   f. To narrow the scope of the report by date, specify a date.
   g. To view all courses with sessions, select the **with sessions** check box.
   h. To view all courses without sessions, select the **without sessions** check box.
5. Click **Submit** to generate the report.
6. To export the report, select a format from the **Export** item list, and then click Export.

Online Sessions -- Overview

Use **Online Sessions -- Overview** to view how many sessions users have spent in their courses. The course names, the number of sessions, the total time spent online, and the average length of time a user has spent in a particular course session are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view how many sessions users have spent in all courses:

1. Select **Reports > Session Reports > Online Sessions -- Overview > Hierarchy level**.
2. Select the checkbox for sub-levels on which you want to run the report.

3 To customize your report:
   a Click **Show/Hide**.
   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To narrow the scope of the report by date, specify a date.
   g To view all courses with sessions, select the **with sessions** check box.
   h To view all courses without sessions, select the **without sessions** check box.
4 Click **Submit** to generate the report.
5 To export the report, select a format from the **Export** item list, and then click Export.

Online User Sessions -- By Course

Use **Online User Sessions -- By Course** to view how much time users are spending in a particular course. The number of sessions, the length of the sessions, and the average session length for each user of the course are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view how much time a users spends on a particular course:

1 Select **Reports > Session Reports > Online User Sessions -- By Course > Hierarchy level**.
2 Select the checkbox for sub-levels on which you want to run the report.
3 Select a course.
4 To customize your report:
   a Click **Show/Hide**.
   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To narrow the scope of the report by date, specify a date.
   g To view all courses with sessions, select the **with sessions** check box.
   h To view all courses without sessions, select the **without sessions** check box.
5 Click **Submit** to generate the report.

6 To export the report, select a format from the **Export** item list, and then click Export.

User Online Course Sessions -- By Curriculum

Use **Curriculum Online Course Sessions -- By Curriculum** to view how much time all assigned users are spending in a particular curriculum. The course name, total sessions, time online, and average session duration are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view how much time all assigned users spend on a particular curriculum:

1 Select **Reports > Session Reports > User Online Course Sessions -- By Curriculum > Hierarchy level**.

2 Select the checkbox for sub-levels on which you want to run the report.

3 Select a curriculum.

4 To customize your report:

- a Click **Show/Hide**.
- b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
- c To designate a display column as a column by which to sort the report, click Add to sort.
- d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
- e To divide the report by a specific criterion, select from the **Group By** item list.
- f To narrow the scope of the report by date, specify a date.

5 Click **Submit** to generate the report.

6 To export the report, select a format from the **Export** item list, and then click Export.

Statistics Reports

There are two reports detailing course and survey statistics.

This table shows the Session Reports reporting options:

Report	Description
Survey -- By Course on page 286	View all user responses for a course survey.
ILM Course Statistics on page 286	View course statistics.

Survey -- By Course

Use **Survey -- By Course** to view all the answers given to survey questions by end users. Surveys are administered to obtain a general idea of how people weigh in on an issue or a topic. Surveys measure reactions. Other Survey reports make it difficult to get this general idea, because of the way they are broken down. Moreover, the other survey reports are “normal” reports, which means that they do not lend themselves to the flexibility of the Dynamic Reports. The course name, question titles, question text, user responses, user names, user logins and email addresses are displayed in this report. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view all answers to a survey for a particular course:

1 Select **Reports > Statistics Reports > Survey -- By Course > Hierarchy level**.
2 Select the checkbox for sub-levels on which you want to run the report.
3 Select a course.
4 To customize your report:
   a Click **Show/Hide**.
   b To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c To designate a display column as a column by which to sort the report, click Add to sort.
   d Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e To divide the report by a specific criterion, select from the **Group By** item list.
   f To narrow the scope of the report by date, specify a date.
5 Click **Submit** to generate the report.
6 To export the report, select a format from the **Export** item list, and then click Export.

ILM Course Statistics

Use **ILM Course Statistics** to view information about individual courses. You can focus on course users, the time they have spent in their courses, and their assessment scores. In particular, course names, course users, new registrations, course sessions, time spent in the course, average course duration, average time per user, assessment name, assessment type, assessment passing score, assessment average score, and users passed assessment are displayed. As with all dynamic reports, you can customize the report so it best fits your needs.

Please refer to the Understanding the dynamic reports interface on page 238 for more information on customizing your Dynamic Report. See Using information fields in dynamic reports on page 240 to access information on the available fields.

To view information about individual courses:

1. Select **Reports > Statistics Reports > ILM Course Statistics > Hierarchy level**.
2. Select the checkbox for sub-levels on which you want to run the report.
3. To customize your report:
   a. Click **Show/Hide**.
   b. To display a particular column in the report, select the check box. Click **Check All** to select all display columns. Click **Uncheck All** to deselect all display columns. Click **Inverse Check** to reverse your selection.
   c. To designate a display column as a column by which to sort the report, click Add to sort.
   d. Select whether each sort column sorts **A-Z**, which is Ascending, or **Z-A**, which is descending, from the item list.
   e. To divide the report by a specific criterion, select from the **Group By** item list.
   f. To narrow the scope of the report by date, specify a date.
   g. To select which types of assessment to include in the report, select or clear the **Normal Assessment**, **Pre Assessment**, and **Post Assessment** check boxes.
4. Click **Submit** to generate the report.
5. To export the report, select a format from the **Export** item list, and then click Export.

Users

There are several reports detailing activities in the system broken down by users.

This table shows the Session Reports reporting options:

Report	Description
Credits -- By User on page 288	View Infor Learning Management and outside credits earned by a user.
Credits -- Overview on page 288	View Infor Learning Management and online credits for all users.
Registration -- Overview on page 288	View registration dates for all users.
Scores -- By Module on page 289	View a user’s assessment scores by module within a Infor Learning Management course.
Scores -- By Question on page 289	View a user’s assessment scores by question within a course.
Scores -- External Tests on page 289	View a user’s external test scores.
Scores -- Knowledge Gap on page 290	View a comparison of a user’s Pre- and Post-Assessment scores within a Infor Learning Management course.
Sessions -- Admin on page 290	View Administrator session statistics for a user.

Report	Description
Sessions -- Course on page 290	View total sessions and total online time for a user by course.
Sessions -- Course Overview on page 290	View total sessions and total online time for all users by course.
Sessions -- ILM Learner on page 291	View Infor Learning Management Learner session statistics for a user.

Credits -- By User

Use **Credits -- By User** to view Infor Learning Management course and external course credit information for a selected user, based on the most recent assessment scores. Course names, scores, pass/fail statuses, credits earned and dates scored are displayed.

To view credit information for a particular user:

1. Select **Reports > Hierarchy level > Users > Credits -- By User > User name**.
2. To export your report as an Excel spreadsheet click Export to Excel.

Credits -- Overview

Use **Credits -- Overview** to view the number of cumulative credits for each user in the selected level.

To view the number of cumulative credits for each user:

1. Select **Reports > Hierarchy level > Users > Credits -- Overview**.
2. To view a new group of records, choose a group from the **Records** item list.
3. To export the entire report as an Excel spreadsheet, select Complete Report. The report is displayed in a separate window.
4. To export only the records that you chose, select Export to Excel.

Registration -- Overview

Use **Registration -- Overview** to view a report of when all user accounts were created for the selected level.

To view when all user accounts were created:

1. Select **Reports > Hierarchy level > Users > Registration -- Overview**.
2. To view a new group of records, choose a group from the **Records** item list.

3 To export the entire report as an Excel spreadsheet, select Complete Report. The report is displayed in a separate window.
4 To export only the records that you chose, select Export to Excel.

Scores -- By Module

Use **Scores -- By Module** to view assessment scores by user for Infor Learning Management courses that contain pre, post or normal assessments. Environment, Module, Total Questions, Correct, Score, Passing Score, and Date Taken are displayed.

Only scores for assessment modules are displayed and course completion criteria is excluded. Scores for courses associated with the resetting of certification programs will not be displayed on this report until the user earns new scores.

To view ILM assessment scores for a particular course and particular user:

1 Select **Reports > Hierarchy level > Users > Scores -- By Module > User name**.
2 Select a course from the **Select Course** item list.
3 To export your report as an Excel spreadsheet, click Export to Excel.

Scores -- By Question

Use **Scores -- By Question** to view a user's assessment scores by question for Infor Learning Management courses that contain pre, post or normal assessments. You can determine which questions the user answered correctly. However you will not be able to view the specific answers the user selected. Environment, Module, Question (Page name), Score, Question Weight, and Weighted Score are displayed.

To view a particular user's assessment scores by question:

1 Select **Reports > Hierarchy level > Users > Scores -- By Question > User name**.
2 Select a course from the **Select Course** item list.
3 To export your report as an Excel spreadsheet, click Export to Excel.

Scores -- External Tests

Use **Scores -- External Tests** to view results for users' external tests that were recorded in Infor Learning Management. Assessment scores for supported third-party courses can also be viewed with this option.

To view a particular user's scores for an external test:

1 Select **Reports > Hierarchy level > Users > Scores -- External Tests > User name**.
2 To export your report as an Excel spreadsheet click Export to Excel.

Scores -- Knowledge Gap

Use **Scores -- Knowledge Gap** to view how well users understand the concepts taught within each Infor Learning Management course by comparing their pre-assessment and post-assessment scores.

For Infor Learning Management Administrator to generate a knowledge gap report for a particular course, the course author must have used the Roadmap feature when developing the course.

To compare a user's pre-assessment and post-assessment scores

1. Select **Reports > Hierarchy level > Users > Scores -- Knowledge Gap > User name**.
2. Select a course from the **Select Course** item list.
3. To export your report as an Excel spreadsheet, click Export to Excel.

Sessions -- Admin

Use **Sessions -- Admin** to view statistics, such as the total number of Infor Learning Management Administrator sessions and total time spent using Administrator for a selected user.

To view a particular user's statistics for ILM Administrator sessions:

1. Select **Reports > Hierarchy level > Users > Sessions -- Admin > User name**.
2. To export your report as an Excel spreadsheet, click Export to Excel.

Sessions -- Course

Use **Sessions -- Course** to view the number of sessions and time online for Infor Learning Management and supported third-party courses for individual users. Course names, total sessions, and time online are displayed.

To view a particular user's statistics for course sessions:

1. Select **Reports > Hierarchy level > Users > Sessions -- Course > User name**.
2. To export your report as an Excel spreadsheet click Export to Excel.

Sessions -- Course Overview

Use **Sessions -- Course Overview** to view records for Infor Learning Management and supported third-party courses for all users and courses in the selected level. Sessions, time online, and most recent pre and post assessment scores are displayed.

To view all course session statistics for all users:

1. Select **Reports > Hierarchy level > Users > Sessions -- Course Overview**.
2. Specify a date range for the report.

3 Select the **with Sessions**, **without Sessions** or **All** radio button.
4 Click **Submit**.
5 To export your report as an Excel spreadsheet click Export to Excel.

Sessions -- ILM Learner

Use **Sessions -- ILM Learner** to view the total number of Infor Learning Management Learner sessions and total time spent in Infor Learning Management Learner for a selected user.

To view a particular user's ILM Learner session statistics:

1 Select **Reports > Hierarchy level > Users > Sessions -- Learner > User name**.
2 To export your report as an Excel spreadsheet, click Export to Excel.

Reports by event type

This table shows which reports are available for which event type.

Table 4: Standard Reports

Users			
ILM Reports	ILM Courses	Online Courses	Classroom Courses
Scores – By Module	✓		
Scores – By Questions	✓		
Scores – Knowledge Gap	✓		
Scores – External Tests		✓	✓
Credits – By User	✓	✓	✓
Credits - Overview	✓	✓	✓

Courses			
ILM Reports	ILM Courses	Online Courses	Classroom Courses
Scores – By User	✓		
Scores – By Module	✓		

Courses			
ILM Reports	**ILM Courses**	**Online Courses**	**Classroom Courses**
Scores – By Question	✓		
Scores – By Percentages	✓	✓	
Scores – By Passed	✓		✓
Scores – Knowledge Gap	✓		
Scores – External Scores		✓	✓
Sessions – Overview	✓	✓	
Sessions – User	✓	✓	
Sessions – Started	✓	✓	
Sessions – Not Started	✓	✓	
Evaluations – Level 1	✓	✓	✓
Evaluations – Level 2	✓		
Survey – By Users	✓	✓	✓
Survey – Stats	✓	✓	✓
Survey – Session	✓	✓	✓
Event - Enrollment Sheet			✓
Event - Cancelled Enrollment			✓
Event – Credit			✓
Event – Wait List			✓
Event – Enrollment/Attendance			✓
Event - Cost	✓	✓	✓
Course/Event – Cancelled Users	✓	✓	✓

Courses			
ILM Reports	**ILM Courses**	**Online Courses**	**Classroom Courses**
Chargeback	✓	✓	✓

Table 5: Dynamic Reports

Score Reports			
ILM Reports	**ILM Courses**	**Online Courses**	**Classroom Courses**
ILM Pre vs. Post Assessment – By Course	✓		
ILM Assessment Scores – User	✓		
ILM Assessment Scores – Course	✓		
ILM Assessment Scores – Overview	✓		
External Assessment Scores – User		✓	✓
External Assessment Scores – Course		✓	✓
External Assessment Scores - Overview		✓	✓
Score Summary – User	✓	✓	✓
Score Summary – Course	✓	✓	✓
Score Summary - Overview	✓	✓	✓
Course Scores – User	✓	✓	✓
Course Scores - Course	✓	✓	✓
Course Scores – Overview	✓	✓	✓
ILM Question Scores – By User	✓		
ILM Question Scores – By Course	✓		

Session Reports			
ILM Reports	**ILM Courses**	**Online Courses**	**Classroom Courses**
Online Course Sessions – By User	✓	✓	
Online User Sessions – By Course	✓	✓	

Event Reports			
ILM Reports	**ILM Courses**	**Online Courses**	**Classroom Courses**
Enrollment – By Course	✓	✓	✓
Enrollment – By User	✓	✓	✓

Statistics Reports			
ILM Reports	**ILM Courses**	**Online Courses**	**Classroom Courses**
Survey – By Course	✓	✓	✓

Learning Trend Reports			
ILM Reports	**ILM Courses**	**Online Courses**	**Classroom Courses**
Users Courses Enrolled vs. Passed (version 5.6)	✓	✓	✓
Peer Groups Scoring Over Time Comparison	✓	✓	✓
Users Courses Taken	✓	✓	✓
User(s) Course(s) Enrolled	✓	✓	✓
Peer Groups Pre-Assessment vs. Post-Assessment	✓	✓	✓

System

Your Concept

Viewing server configuration details

Use Information to view configuration details about the Infor Learning Management server such as website IP, database server IP, and VB script version. You can not change this information with this option.

The VB Script version that is required to run Infor Learning Management is 5.6. If the version listed is below 5.6, then a newer version of the VB Script runtime should be installed on the web server. Please consult the ILM Server Installation Guide for details. This VB Script version is pre-installed on Windows 2000 and Server 2003.

To view server configuration details:

1. Select **System > System Information >** Information.
2. To view the hotfixes that have been applied on your site click **Hotfix Deployment Status**.

Viewing and updating the ILM License Key

Use ILM License Key to view and update your Infor Learning Management Level 1 License Key. The Level 1 License Key determines how many licenses are available. You will only update the Level 1 License when your contract has been revised. Upon changing your contract for licensing, your Infor account manager will provide you with a new license key. You will then specify the new key in the License Key field. You can also view license key information. The locales available, expiration date, and total users are displayed.

Infor provides Level 1 License Keys with each copy of Infor Learning Management based on the user license purchased. If you have questions about licensing or require additional licenses, please contact your Infor Account Manager.

A pop-up notification is automatically generated whenever an administrator launches Infor Learning Management Administrator 30 days prior to the product license key expiration date. The first time the pop-up notification is displayed, an e-mail is automatically sent to the Infor sales department.

To view and update the ILM License Key:

1 Select **System > System Information >** ILM License Key.
2 To update the license, specify the new license key provided to you by your Infor account manager in place of the existing license key.
3 Click **Submit**.

Viewing all hierarchy levels

Use Level Status to view all levels within the level selected on the Hierarchy. Active Sessions, Total Levels, Total Managers, Total Courses, Total Users, Total Level 2 Authors, and Total Course Authors are displayed. The statistics displayed are dependant on the level you have selected from the Hierarchy.

To view all hierarchy levels:

1 Select **System > Hierarchy level > System Information >** Level Status.
2 To export the information on the page as an Excel spreadsheet, click Export to Excel.

Working with common features

Use **Common Features** to specify a variety of configuration settings for the Infor Learning Management applications.

To work with common features:

1 Select **System > System hierarchy level > System Configuration Options > Common Features**.
2 Click the **General** tab.
   a Specify this information:

      Session Timeout
      Select the amount of time that a user account, which is no longer requesting information from the web server, will remain active in the system before it is automatically signed out. Options range from 20 to 120 minutes.

      System Status Interval Check
      select how often data on whether a user is logged in or not is transferred between the server and the Infor Learning Management Learner and Infor Learning Management Administrator applications. Options range from 1 to 120 minutes.

      Entry Message
      Specify text that is displayed in the status bar.

SMTP Server
Specify the SMTP server. A valid SMTP server is needed so you can send course registration approval requests and notifications. Specify your User Name and Password in the following fields if an **SMTP Authorization** is selected.

Default Mailbox
Specify the address that is used to send notifications. Any address specified on a notification screen will override this setting.

SSL
Select an option to govern the Secure Socket Layer settings throughout the system.

Login Method
Select an option to determine whether the method users employ to login is **ILM**, or integrated with **NT Login**, **Site Minder**, or **Site Minder (Encoded)**.

Number of user login attempts
Specify the number of attempts a user has to login before the user is locked out.

Force password change every
Specify the number of days in which the password will expire. Users will be prompted to select a new password based upon the specified number of days that the password will expire. Select **Never**, **First Login Only**, or numerals between 1 - 365 from the drop down list.

b To have a link displayed that the user can use to log into a course without specifying their password select the **Allow Seamless Login Without Password** check box.

c To log all e-mails sent by ASP pages for individual and group user notification to \repository\tempfiles\logs\email, select the **Log Emails** check box.

d To enable all foreign alphabet characters to be displayed when searching for users, select the **Enable search with foreign characters** check box. Only characters that pertain to the Administrator's default language are displayed if this option is disabled.

e To have the portal displayed for users who sign on to Infor Learning Management, select the **Portal Enabled** check box. To have Infor Learning Management Learner or Administrator displayed instead, depending on where they last signed on, clear the **Portal Enabled** check box.

f To have Interactive Help displayed in Learner Help, select he **Interactive Help Enabled** check box.

g To have a link displayed for events in which a user can register on the portal page, select the **Allow Register and Launch** check box. After registration, the course begins.

h To have a link displayed for events in which a user can register on the portal page, select the **Allow Register** check box. After registration, the course does not automatically begin.

i Specify this information:

System Offline
To take the system offline for maintenance, select the **System Offline** check box and specify a message that is displayed to users who attempt to sign on while the system is offline. Users with administrative privileges can still login when the system is offline.

FDA Learner - Show Score - Verify Password
To require the user to provide their password before they click **Click Here for Score** to submit an assessment score, select the **FDA Learner - Show Score - Verify Password** check box and specify a verify password message that is displayed on the **Score** page. This option is available in compliance with various FDA regulations.

Show Score Popup
To have a window displayed so you can inform the user that they must click **Click Here for Score** to record an assessment score, select an option from the **Show Score Popup** item list and specify the message that is displayed.

Roadmap Popup Message
Specify the message that is displayed to inform the user they have activated their personal roadmap. This message is displayed after the user turns on the Roadmap feature to customize their path through a course.

j Click **Update** to complete the process or **Reset** to undo changes.

3 Click the **Admin** tab.

a Specify this information:

Admin -- Report page sizing (paging)
Specify the size of pages for long reports.

Archive events (Specify 0 not to archive)
Specify the number of days to wait before archiving an event that has ended.

Maximum depth of levels hierarchy
Select the maximum number of levels to create in the Hierarchy. Choose value from 5 to 12 in the item list. If you change the maximum depth of levels to a value less than the currently deepest level in your Hierarchy, all levels below the depth you wish to select must be removed first.

Admin level display group threshold
Specify a value to control the number of levels that can be displayed in one branch of the Hierarchy before it is broken into groups of 100 levels.

b Click **Update** to complete the process or **Reset** to undo changes.

4 Click the **Portal** tab.

a To have a use's history displayed when they are removed from a level, select the **Show only activities pertaining to user's Hierarchy in Portal** check box. The user will not be able to view any courses associated with the level they were removed from in their portal.

b To have score history for aggregate courses displayed in the transcript history, select the **Show score history for aggregate courses in Transcript History** check box.

c Click **Update** to complete the process or **Reset** to undo changes.

5 Click the **Content Creator** tab.

a Specify this information:

Publish all courses with a default event template
Select the template that will be utilized to create a new event for Infor Learning Management courses. Existing event templates that were created in the system are available in the item list.

Publish all courses with a default Learner theme
Select the Infor Learning Management Learner theme that displays for Infor Learning Management courses. Individual course themes can be changed with Editing course information on page 108.

Quantity
Specify a value to determine the number of course versions that are maintained and tracked in Administrator. You can use this to allow authors to revert back to earlier versions of a course if it becomes necessary.

b To eliminate problems arising from multiple authors editing a course simultaneously, select the **Disable server-side editing** check box, so that authors must retrieve their courses from the server in order to edit them.

c Click **Update** to complete the process or **Reset** to undo changes.

6 Click the **Preview Features** tab.

a Specify this information:

SoHo Xi Portal
Select if you want to enable SoHo Xi Portal. SoHo Xi is the newer portal version with improved functionality and options. To apply a SoHo Xi template, select the template in the Portal Options.

SoHo Xi Administrator Functions
Select to enable SoHo Xi Administrator functions.

Distribution Enhancements
Contact your Infor support representative to request these functions for your staging site.

Changing application strings

Use **Change Application Strings** to modify keys-strings of placeholder text used to display pre-determined words or phrases-to change instances of words or phrases as they are displayed in either portals or administrator. For example, if your organization chooses to not use the term "curriculum," it can be replaced with another administrator-defined word or phrase. This can also be used for translation purposes if your organization operates in multiple languages.

To change application strings:

1 Select **System > System hierarchy level > System Configuration Options > Change Application Strings**.

2 Specify the value, the text displayed on-screen, for the key you wish to change in the Key Description field.
3 Select the Infor Learning Management component in which you wish to search for the key from the **Components** item list.
4 Select the area/language in which you wish to search for the key from the **Locale** item list.
5 Click **Search**. The results are displayed.
6 Click Select.
7 Specify a value for each locale in the fields.
8 Click **Update**.

Changing the title bar text

Use **Learner and Administrator Titles** to change the text that is displayed in the title bar in Infor Learning Management Administrator and Infor Learning Management Learner.

To change the title bar text:

1 Select **System > System hierarchy level > System Configuration Options > Learner and Administrator Titles**.
2 Specify an Admin title and Learner title.
3 Click **Update**.

Changing default colors

Use **Default Learner Theme Color** to change the default colors for the Infor Learning Management Learner interface. The Infor Learning Management Portal interface is not affected by these changes.

Default Learner Theme Color is only available when using Internet Explorer.

To change default colors:

1 Select **System > System hierarchy level > System Configuration Options > Default Learner Theme Color**.
2 To select a color: click the Color Picker, adjust the RGB Color Sliders, specify a hexadecimal code in the Hex # field, or specify numerical values in the Red, Green, and Blue fields.
3 To change the background color, click **Set Background**.
4 To change the text color, click **Set Text** to apply the selected color.
5 Click **Update**.

Enabling and disabling buttons in Learner

Use **Default Learner Toolbar** to disable and enable buttons on the Infor Learning Management Learner toolbar, and to define the buttons that are displayed in the **Tools** toolbar. This is a system-wide change and will modify the learner toolbar for all courses on the server.

To enable and disable buttons in learner:

1. Select **System > System hierarchy level > System Configuration Options > Default Learner Toolbar**.
2. Use the **Do Not Show**, **Default Learner Toolbar**, and **Tools Toolbar** radio buttons to select which buttons are displayed.
3. Click **Set Learner Toolbar** to complete the process.

Customizing the user registration form

On this page you can customize the user registration form. Select the fields users must complete during registration. You can run reports on this information. You can customize the user registration form by choosing the fields that users must fill in with their information. You can choose from 36 predefined fields and six custom fields. None of the fields are required to be on the user registration form. Think carefully about the information you want to use for user registration, because you can run reports on this information later on.

To customize user registration:

1. Select **System > Hierarchy level 2 > Configuration Settings > System Configuration Options > User Fields**.
2. For all of the available user fields, select **Don't Show**, **Show**, or **Required** in the **Status** item list.
3. To create a custom user field, specify the new name in the text field next to Custom 1, Custom 2, etc.
4. Click **Update**.

Viewing your content creator version

Use **Content Creator Version** to view the version of Infor Learning Management Content Creator that is currently installed on your organization's system. You can also use this option to update the displayed version to another build version if another version is installed.

To work with content creator version:

1. Select **System > System hierarchy level > Configuration Settings > System Configuration Options > Content Creator Version**.
2. Specify this information:

Upgrade to Version
To change the displayed version of Content Creator, specify the number of the currently installed build version of Content Creator.

3 Click **Update**.

Setting currency options

Use **Currency Options** to set a default currency for the system, add or remove additional currencies, and update current exchange rates for those currencies. The currency is used to compute the charge back cost. You cannot delete the default currency, unless you first select another default currency. This feature is global to the entire application and is only available at the System level.

To set currency options:

1. Select **System > System hierarchy level > Configuration Settings > System Configuration Options > Currency Options**.
2. To change the default system currency:
   a. Select the currency from the **Default System Currency** item list.
   b. Click **Change Default Currency**.
3. To add a currency:
   a. Specify this information:

      Symbol/Name
      Specify the 3-letter alphabetic code for the currency.

      Exchange Rate
      Specify the current exchange rate of the specified currency with the default currency.

   b. Click **Add currency**.
4. To change the exchange rate of a currency:
   a. Select the check box.
   b. Specify the new exchange rate in the field.
   c. Click **Update Rates**.
5. To remove a currency from the system:
   a. Select the check box.
   b. Click **Remove Selected**.

Using device user agent

Use **Device UserAgent** to view currently known user agents strings. In the event that a device used by your organization is not currently configured, use this page to generate and save a user agent string for that device. Infor will periodically update this list with additional user agent strings as new devices are released.

As an ever-increasing number of devices ranging from desktop or laptop computers to tablets to smartphones and beyond are being used to access Infor Learning Management, the platform must be configured to work on a per-device basis within the particular limitations of the accessing device. Not every device can launch Administrator, for example, so this feature needs to be disabled when the system is accessed through a device that lacks this functionality.

Every device that accesses Infor Learning Management sends a user agent string that identifies the device to the Infor Learning Management system. This identifying information is used to make adjustments to its functionality that are necessary to optimize the user experience through that device. All currently known user agents strings are listed on the Device User Agent option and are categorized into three types: Desktop or Laptop, Tablet, or Smartphone.

To use device user agent:

1. Select **System > System hierarchy level > Configuration Settings > System Configuration Options > Device UserAgent**.
2. To search for a device user agent, specify a search term for the Type or User Agent String.
3. To add a new user agent string to the list:
   a. Scroll to the bottom of the screen so that you can see the URL displayed.

      Note: The following steps are all performed on the device for which you wish to create the new user agent string.
   b. Turn on the device.
   c. Open a browser while connected to the Internet and navigate to the URL displayed on the **Device User Agent** screen. A similar screen is displayed on the device.
   d. Select the radio button for the type of device for which you are adding a user agent string.
   e. Click **Save**.

Configuring ILM for e-Meetings

To utilize e-Meeting functionality, you must have an account with WebEx. After this account is established, use **e-Meeting Configuration** to setup your e-Meeting functionality. You should have your account information handy, since you will need to specify this information on the screen. Specify the information on this screen to allow ILM to connect with WebEx.

After you configure your e-Meeting software, you will need to setup your licenses. To do this, see Configuring e-Meeting licenses on page 304.

To configure e-Meetings:

1 Select **System > System hierarchy level > Configuration Settings > System Configuration Options > e-Meeting Configuration**.
2 If you have purchased a WebEx account, select **WebEx** from the **Select e-Meeting Vendor** item list.
3 Specify this information:

WebEx ID
Specify the WebEx ID that was assigned to your organization. This field is displayed after you select **WebEx** from the **Select e-Meeting Vendor** item list.

Password
Specify the password that WebEX assigned to your organization. This field is displayed after you select **WebEx** from the **Select e-Meeting Vendor** item list.

Partner ID
Specify the partner ID that WebEx assigned to your organization. This field is displayed after you select **WebEx** from the **Select e-Meeting Vendor** item list.

Site ID
Specify the ID that WebEx assigned to your WebEx server. This field is displayed after you select **WebEx** from the **Select e-Meeting Vendor** item list.

Site URL
Specify your organization's WebEx server address. This field is displayed after you select **WebEx** from the **Select e-Meeting Vendor** item list.

4 Click **Update**.

Configuring e-Meeting licenses

Use **e-Meeting Licenses** to specify the number of licenses you have purchased, so that you can schedule e-Meetings with WebEx.

You can only create e-Meetings for a number of users less than or equal to the number of licenses you have purchased from your e-Meeting vendor.

To configure e-Meeting licenses:

1 Select **System > System hierarchy level > Configuration Settings > System Configuration Options > e-Meeting Licenses**.
2 Select the **Active** check box.
3 Specify this information:

Licenses
Specify the number of concurrent user licenses purchased from WebEx.

Offset
Specify how many minutes before an e-meeting's scheduled start time users can join the e-meeting.

4 Click **Update**.

Configuring ad hoc reports settings

Use **Ad Hoc Reports Settings** to configure a variety of settings related to your ad hoc reports. These settings cover the colors used in the reports as well as options related to the Toolbar, Tabs, Features, Viewer, and Security.

To configure ad hoc reports settings:

1. Select **System > System hierarchy level > Configuration Settings > System Configuration Options > Ad Hoc Reports Settings**.
2. To assign any ad hoc reports that currently belong to deleted users to yourself:
   a. Click **Reassign Reports from Deleted Users**. A confirmation dialog box is displayed.
   b. Click **OK**.
3. To change the current ad hoc report settings, select the desired settings and specify the desired values for each item you would like to change.
   a. You can move your mouse pointer over any item label to see a tooltip containing additional information about that setting.
      1. To allow users to add or modify gauges with the report designer, select the **Show Gauge Tab** check box. The **Gauge** tab is displayed on the **Report Designer** page.
      2. To allow users to use the report designer to add or modify a summary section in a report, select the **Show Summary Tab** check box. The **Summary** tab is displayed on the **Report Designer** page.
      3. To allow the user to set the title, description, header, footer, report scheduler settings (if enabled), and report access permissions for a report through the report designer, select the **Show Misc Tab** check box. The **Misc** tab is displayed on the **Report Designer** page.
      4. To allow the user to modify the report colors, print options, visual group advanced options, report order, set report viewer items per page, and modify field value / report layout options through the report designer, select the **Show Style Tab** check box. The **Style** tab is displayed on the **Report Designer** page.
      5. To allow the user to add or modify trend, pie, plot, and bar charts in a report through the report designer, select the **Show Chart Tab** check box. The **Chart** tab is displayed on the **Report Designer** page.
      6. Specify this information:

         Num Chart Tabs (1 to 6)
         Specify the maximum number of charts per report in the Report Designer. A tab is displayed for each chart on the **Report Designer** page.

         Report Viewer Default Preview Results
         Specify the default number of results in the Report Viewer for all reports. Izenda does not recommend setting this to a large number, such as 5000 or larger, as the html report will take a long time to generate. If you would like to view all the data, we recommend exporting the report: the entire output is displayed.

b Click the links in the Appearance (Images & CSS) section to view Microsoft's official Colors by Name chart. The acceptable color names that can be specified into these fields are displayed.

1 Specify this information:

Default Report Border Color
Specify the default border color for reports.

Default Report Item Color
Specify the default report item color. This mainly affects the grid report.

Default Header Foreground Color
Specify the default header foreground color.

Report Header Image Url
Specify a report header image to be used on reports. It must be an absolute path, such as http(s)://www.site.com/header.gif.

Default Alternating Item Color
Specify the default alternating item color. This mainly affects the grid report.

Default Report Header Color
Specify the default report header color, such as DarkSlateBlue.

Default Item Foreground Color
Specify the default item foreground color. This mainly affects the grid report.

c To enable the delete icons on the report list page for the current user, select the **Allow Deleting Reports** check box.

d To allow a user to overwrite saved reports, select the **Allow Overwriting Reports** check box. Many administrators create default reports for their users. If you want to disable the overwrite report feature to ensure that the default reports are not tampered with, clear the **Allow Overwriting Reports** check box.

e Specify this information:

Default Preview Results
Specify the default number of results displayed in the report designer **Preview** tab. After exporting, all results will be exported, regardless of what the default value is. Web browsers are not designed to show reports with hundreds of thousands of lines, so keep this in mind when changing this setting. This should be specified to a power of 10 such as 1, 10, 100, or 1000.

f To enable the Filter Logic field in the **Filters** tab in the Report Designer, select the **Show Filter Logic** check box. User Filter Logic when you need to change filters priority or define custom filters relations.

g To enable filters in the Report Viewer, select the **Show Filters In Report Viewer** check box.

h To enable the Simple Mode for Report Viewer, which disables the ability to load another report, export the report, and add fields, select the **Show Simple Report Viewer** check box. If the report has a filter, it can be used to update the report results. Simple Mode just shows the report and current filters. You can change the current filter, but the ability to add or export additional filters is removed.

i To have date and time data displayed based on the time zone (offset) coming from the user's browser, select the **Display dates in user's time zone** check box. This only applies to Ad Hoc reports and will only impact reports that are run and exported online through the portal or Administrator. It has no effect on scheduled reports that are sent through e-mail notifications.

j To collapse the filters in the report viewer by default, select the **Collapsed Filters In Report Viewer** check box. You should have ShowFiltersInReportViewer enabled to use this setting.

k Specify this information:

Data Cache Interval, minutes
Specify, in minutes, how often the data is cached.

l To have Data Sources displayed as check boxes instead of in an item list, select the **Show Data Sources As Check Boxes** check box.

m To enable Strict A N S I Outer Join, select the **Strict A N S I Outer Join** check box.

n To have the **Map** tab displayed in the report designer, select the **Show Map Tab** check box.

o To allow new categories to be created in the **Save As** window in the Report Designer, select the **Allow Create New Category** check box.

4 Click **Save**.

Configuring Tin Can activity provider

Learning Activity Provider (LAP) is a user activity source. This provider can be a site, an online course, an offline mobile app, or another external system that can publish user activities to ILM.

1 Select **System > Configuration Settings > System Configuration Options > Tin Can Activity Provider**.

2 Specify **Activity Provider ID** and click **Add Provider**.

3 Click **Edit** to edit provider settings.

4 Specify this information:

Tin Can Provider Info
ID/Consumer Key
Name
URL
Consumer Secret
RSA Public Key

Permissions
Statement Right
Statement Read
Activity Write
Actor Write
Document Read
Document Write

5 Click **Save**.

6 Specify an Activity ID and click **Add Activity**.
7 To remove an activity provider, click **Remove** next to that provider.

Changing level tier names

Use **Change Level Tier Names** to assign standard names to Hierarchy levels. Level names have an impact on the user registration process. When a new user registers with self-registration, level names are displayed to guide users to the appropriate levels.

To change level tier names:

1. Select **System > System hierarchy level > Configuration Settings > Level Structure > Change Level Tier Names**.
2. To rename a level, specify the new name in its field.
3. Click **Update**.

Adding a hierarchy level

Use **Add Level** to create levels in Infor Learning Management. You need to add levels to the Hierarchy to build your system. You should build your Hierarchy before creating other items. Think carefully about the organization of your portal before you build it.

Your courses, curricula, certifications, and report generation rely heavily upon the setup of the Hierarchy, so it is extremely important that you carefully plan it out before making any changes.

To add a hierarchy level:

1. Select **System > Parent hierarchy level > Configuration Settings > Level Structure > Add Level**.
2. Specify this information:

   Name
   Specify the name of the level.

   Password
   To require users to specify a password to self-register, specify the password.

   IMS Unique Level ID
   To assign an ID code to the new level, specify the appropriate code. The IMS Unique Level ID is used to match Infor Learning Management levels with hierarchical levels from other systems, such as HR databases, when data is imported and exported using the IMS API.

Manage Level 2 License Allocation
Specify the number of users who will be in the level. This field is only displayed if you are creating a new Level 2. The maximum total system license numbers for your server is displayed in parentheses.

3 To add custom fields to your new level, select the desired custom field values from the **Values** item list. See Add Custom Fields on page 333 for instructions on creating additional fields.

4 Click **Add**.

Editing level properties

Use **Edit Level Properties** to modify the name, password, IMS Unique Level ID, or custom fields of an existing level.

To edit level properties:

1 Select **System > Hierarchy level 2 or below > Configuration Settings > Level Structure > Edit Level Properties**.

2 Specify a Name and this information:

Password
To require a password for users who self-register for the level, specify a password.

IMS Unique Level ID
To assign an ID code to the level, specify a code.

3 To add custom fields to your new level, select the desired custom field values from the **Values** item list.

4 Click **Update**.

Removing a level

Use **Remove Level** to remove levels from the Hierarchy. You can not remove the System level.

> **Caution:** Removing a level is irreversible. Removing a level also removes all of its child levels. All data associated with the removed levels will be deleted, with the exception of users, scores and attendance records. Proceed with caution.

To remove a level:

1 Select **System > Hierarchy level 2 or below > Configuration Settings > Level Structure > Remove Level**.

2 Click **Remove**. A confirmation dialog box is displayed.

3 Click **OK**.

Managing level 2 license allocation

Use **Manage Level 2 License Allocation** to determine how licenses are divided between the levels. The total number of user licenses may be allocated to any number of Level 2 Hierarchy levels. The number of assigned users cannot exceed the total number of user licenses available. The system monitors the number of used licenses for allowing users into the system. The numbers in the Used column indicate how many of those assigned licenses have been used.

To manage level 2 license allocation:

1. Select **System > System hierarchy level > Configuration Settings > Level Structure > Manage Level 2 License Allocation**.
2. Specify this information:

   Assigned
   Specify the number of Level 2 licenses that you wish to assign. Fields may not be left blank. To leave a level without any licenses assigned to it, specify **0**. The values in each field are the number of licenses that have been assigned to each Level 2.

3. Click **Submit**.

Moving a level

Use **Level Movement** to move levels within the hierarchy. After the level move, all users, courses, curricula, certification programs, and distribution groups are associated with the new hierarchy tree.

To move a level:

1. Select **System > Configuration Settings > Level Structure > Move Level**.
2. If you want the users associated with the current level to be available only in the new parent level, select **Remove users from old hierarchy levels when the level is moved**.
3. Select the level you wish to move from the **Source Level** tree, and then select the new parent level from the **New Parent Level** tree.

   Note: System level cannot be moved.

4. Click **Confirm**.
5. To confirm the level movement, type `MOVE` and click **Move**.
6. To view level movement logs, select **Level Move Web Service Logs** or **Level Move Web Service Error Logs**.

Managing comment categories

Use **Manage Comments** to add and edit different comment categories and status flags that are displayed in Infor Learning Management Learner. This allows for more efficient comment searches in Infor Learning Management Administrator.

To manage comment categories:

1. Select **System > System hierarchy level > Configuration Settings >** Comments **> Manage Comment Categories**.
2. To add a new comment category:
   a. Specify this information:

      Categories
      Specify the name.

      Order ID
      Specify the numeric order.

   b. Click **Add New**.
3. To add a new status flag:
   a. Specify this information:

      Status
      Specify the description.

      Order ID
      Specify the numeric order.

   b. Click **Add New**.
4. To modify an existing comment category:
   a. Specify this information:

      Categories
      Specify the name.

      Order ID
      Specify the numeric order.

   b. Click **Update**.
5. To modify an existing status flag:
   a. Specify this information:

      Status
      Specify the name.

      Order ID
      Specify the numeric order.

   b. Click **Update**.

6 To remove a comment category or status flag from the system, click **Delete**. A confirmation dialog box is displayed.

7 Click **OK**.

Managing administrator comments

Use **Manage Administrator Comments** to search, view, and update comments that have been directed to the System Administrator.

To manage administrator comments:

1 Select **System > Hierarchy level > Configuration Settings >** Comments **> Manage Administrator Comments**.

2 To narrow your search to a particular version, select from the **Version** item list.

3 To narrow your search to a particular status flag, select from the **Status** item list.

4 To narrow your search to comments of a particular category, select from the **Related to** item list.

5 To narrow the time frame being searched, select a range from **Posted within** item list.

6 To select an alternate sort method for your search results, select from the **Sort By** item list.

7 To sort your search results in descending order, select the **Sort comments by Descending Order** check box.

8 Click **Search Comments**. Comments that meet your criteria are displayed.

9 To remove comments:

   a Select the check box.

   b Click **Delete**.

10 To reply to a comment, click the user name.

11 To add a note to the comment:

   a Click All notes. A **Comments** window is displayed.

   b Specify your text in the field.

   c Click **Add**. If you are updating an existing note, click **Update**.

   d Click **Close Window**.

12 To change the comment status for a comment, select from the **Status** item list.

13 To change the category the comment is related to, select from the **Related to** item list.

14 To direct the comment to specific personnel, select the **Course Manager** or **System Administrator** from the **Directed to** item list.

15 Click **Update**.

16 To export the listed comments to an Excel spreadsheet, click Export to Excel.

Manage Permission Groups

Administrators can assign roles and specific role permissions to users and associate users with one or more Permission Group. Almost every action has a permission rule associated with it. Some permissions are assigned by default when a user role is assigned and some permissions may need to be assigned manually. Permission groups can be created based on a specific set of permissions regardless of the user role. Individual user permissions are controlled via the user profile page.

To manage permission groups:

1. Select **System > Configuration Settings > Manage Permission Groups**.
2. To add a new permission group, click **+**.
   a. In the Name field, specify the name of the permission group.
   b. Select the user roles to be associated with the permission group.
   c. To assign only the specific role permissions, expand the role by clicking **+** next to the role, and select the permissions you want to associate with the permission group.
   d. Click **Add**.
3. To remove a permission group, click the **Delete** icon next to the group.

Configuring SAML integration settings

Use **SAML Configuration** to enable SAML SIngle Sign On integration. You can view and update SAML configuration values and you can view SAML Logs.

The SAML logs record detailed information about each SAML request that is processed. The logs may be useful in troubleshooting if issues are encountered.

To configure SAML integration settings:

1. Select **System > System hierarchy level > Configuration Settings >** SAML Configuration Settings **> SAML Configuration**.
2. Specify this information:

   SAML Audience String
   This is an optional parameter that can be included in the SAML assertion to identify the intended destination of the assertion. If you select the **Enable Federated Logout** check box, the web page at this URL is displayed after they sign out of the Infor Learning Management Portal.

3. To direct the user to the SAML Audience String URL that you specified, select the **Enable Federated Logout** check box .
4. To enable users, who have not yet authenticated, to navigate directly to Infor Learning Management and then get redirected to authenticate in another system, select the **Enable SP initiated SSO**
5. Click **Update**.
6. To view SAML Logs:
   a. Click **View SAML Logs**. The **SAML Logs** page is displayed.
   b. Click a log file. The log is displayed.

Adding an SAML identity provider

Use **SAML Identity Providers** to edit or delete existing identity providers or to add new providers. A list of identity providers is displayed.

To add an SAML identity provider:

1. Select **System > System hierarchy level > Configuration Settings >** SAML Configuration Settings **> SAML End Points**.
2. Click **Add**. A new window is displayed.
3. Specify this information:

   SAML Identity Provider
   Specify the name of the SAML provider.

   Error URL
   Specify a URL. The user is redirected to this URL if the SAML assertion process fails. Details on what issues may have caused the process to fail are displayed in the SAML log.

4. Click **Choose File** to locate and choose a Public Key Certificate.
5. Click **Apply**.

Editing an identity provider

Use **SAML Identity Providers** to edit or delete existing identity providers or to add new providers. A list of identity providers is displayed.

To edit an identity provider:

1. Select **System > System hierarchy level > Configuration Settings >** SAML Configuration Settings **> SAML End Points**.
2. Click the **Edit** icon.
3. Specify this information:

   SAML Identity Provider
   Specify the name of the SAML provider.

   Error URL
   Specify a URL. The user is redirected to this URL if the SAML assertion process fails. Details on what issues may have caused the process to fail are displayed in the SAML log.

4. To view a certificate that has already been added, click **Download Certificate**.
5. Click **Choose File** to locate and choose a Public Key Certificate.
6. Click **Apply**. A confirmation message is displayed.
7. Click **OK**.

Editing SAML mapping

Use SAML mapping to map SAML user fields to ILM user fields.

1. Select **System > System hierarchy level > Configuration Settings >** SAML Configuration Settings **> SAML End Points**.
2. Click **Edit** under SAML Mapping next to server name to edit mapping for that server.
3. To upload a sample SAML file:
   a. Click **Browse** select the XML file that has the sample mappings and data. (you can create this file using the SAML Logs: select all text including starting and ending tags between `<samlp:Response` and `</samlp:Response>` and save as ".xml".
   b. Click **Parse SAML**. Upon the upload completion, all dropdown lists for SAML Authentication, SAML Overrides, and Enable User Provisioning via SAML, will include all the attributes of that SAML.
4. Specify this information:

   User Identifier Mapping
   LMS Unique ID
   SAML Unique ID

   Timeout and Logout Mapping
   LocalLogoutResponseURL
   TimeoutRequestAssertionURL
   GlobalLogoutURL

5. Select **Enable User Provisioning via SAML** to map the ILM user fields to the SAML attributes. When enabled, users who log in to Ming.le that has an ILM instance associated to it and who do not have an ILM account, will automatically have an ILM account created.
6. Select a SAML attribute for each user property.
7. Click **Apply**.

Deleting an identity provider

Use **SAML Identity Providers** to edit or delete existing identity providers or to add new providers. A list of identity providers is displayed.

To delete an identity provider:

1. Select **System > System hierarchy level > Configuration Settings >** SAML Configuration Settings **> SAML End Points**.
2. Click the Delete icon. A confirmation message is displayed.
3. Click **OK**.

Configuring UltiPro integration

Use **Configuration Settings** to set up or edit the integration with UltiPro, so that you can use UltiPro to create, administer, and execute learning activities.

After integration with UltiPro is complete,

- user accounts are automatically provisioned and updated from UltiPro to Infor Learning Management.
- users sign into Infor Learning Management automatically from UltiPro without the need to sign in to multiple systems.
- courses and events created in Infor Learning Management are automatically synchronized to UltiPro.
- user details from Infor Learning Management, such as test scores and enrollment status, are displayed in UltiPro.

For more details on how to configure the parameters on this page, see documentation provided by UltiPro.

To configure UltiPro integration:

1. Select **System > System hierarchy level > Configuration Settings >** UltiPro Integration Settings **> Configuration Settings**.
2. Select the **Enable UltiPro Integration** check box.
3. Specify this information:

   Max Attempts Per Failed Record
   Specify the number of integration attempts that can fail for a single record before the next record is attempted.

   Max Failures Permitted Per Sync Run
   Specify the maximum number of records that can fail during the sync.

   Service Account Username
   Specify the account name from UltiPro.

   Service Account Password
   Specify the account password from UltiPro.

   User API Key
   Specify the user key from UltiPro.

   Customer API Key
   Specify the customer key from UltiPro.

   Service End Point (URL)
   Specify the URL from UltiPro.

4. Click **Test Communication** to validate the connection . A confirmation message is displayed. If you see another message, review the information you specified and try again.
5. Click **Update**.

Configuring UltiPro integration notifications

Use **Notification Configuration** to set up synchronization status notifications and to specify the frequency in which they are sent. Synchronization information, such as the number of pending, failed, and completed items, including any errors, is displayed in these notifications.

To configure UltiPro integration notifications:

1. Select **System > System hierarchy level > Configuration Settings >** UltiPro Integration Settings **> Notification Configuration**.
2. Select the **Enable UltiPro Integration notifications** check box.
3. Specify this information:

   Subject
   Specify the subject of the notification e-mail.

   Email Recipients
   Specify the e-mail address of the notification recipient.

   First Email At
   Specify at what time the first notification is sent.

4. Select the frequency that notifications are sent from the **Notification's Frequency** item list.
5. To add more recipients, click the add icon and specify the e-mail address.
6. Click **Update**.

Viewing integration status

Use **Integration Status** to view the status of integration. The date and time of the most recent sync and items that are pending, failed, or completed are displayed. You can reset the count for attempts, so that the number of failed and completed items goes to 0.

To view the status of integration:

1. Select **System > System hierarchy level > Configuration Settings >** UltiPro Integration Settings **> Integration Status**.
2. View the information.
3. To reset the count for attempts, click **Reset Attempt Count**.

Audit Trail Status

Use Audit Trail status to verify the status of the audit (Active or Inactive) and if all tables are enabled for the category in percentage (100% means the audit trail for this particular category is running and is at 100%).

Audit Trail Configuration

Use Audit Trail Configuration to set the time limit (in years, 10 years maximum) for which the data will be kept.

Last Modified Date indicates the date and time of the most recent change to the audit trail configuration settings.

Last Updated By indicates the individual who made the most recent change to the audit trail configuration settings.

Managing LinkedIn® Connector

Select **System > Manage LinkedIn® Connector** to manage the integration with the LinkedIn server. A Client ID and a Secret Key that are obtained from the LinkedIn website are required to enable the integration. Administrators need to work with their LinkedIn representative to setup the integration on the LinkedIn site.

Managing Microsoft Azure Application Registrations

Select **System > Manage Microsoft Azure Application Registrations** to manage the integration with the Microsoft Azure server, which includes the Microsoft Teams support. Administrators need to contact their IT Department to request the required application (client) ID, Directory (tenant) ID, and Client Secret keys.

Configuring your PayPal account

Configure your PayPal account so that you can configure e-commerce in Infor Learning Management. If you have already done this, you can skip this procedure. Please note that this process refers to the PayPal website, which is an external site that is not controlled by Infor. As such, the PayPal website is subject to change at any time without notice and these steps may not match the new PayPal site layout. If this occurs, then these steps and labels may no longer be accurate.

Administrators must first decide the portals in which they want to utilize e-Commerce. After this is set, a merchant account must be created with PayPal or AUTHORIZE.net. PayPal and AUTHORIZE.net are trusted and secure methods of sending and receiving payments. Most importantly, they protect and benefit merchants and consumers alike. You can configure your merchant account and shopping cart in Administrator after you set up an account with PayPal or AUTHORIZE.net.

To configure your PayPal account:

1. Sign in to your PayPal account.
2. Select **My Account >** Profile **>** My Selling Tools.
3. Click Update in the Website preferences row.
4. In the Auto Return for Website Payments section:
   a. Select the **On** radio button for Auto Return.
   b. Specify the URL of the page that the user will be returned to after they complete the transaction.
5. In the Payment Data Transfer section, select the **On** radio button for Payment Data Transfer, and configure other options.
6. Click **Save**. Your Payment Data Transfer ID Token is displayed. You will need this to configure your PayPal checkout options in Infor Learning Management.
7. To configure e-commerce in Infor Learning Management, see Configuring e-commerce on page 319.

Configuring e-commerce

Use **E-commerce Configuration** to set up payment processing providers to handle e-commerce transactions in Infor Learning Management Administrator.

With E-Commerce you can charge users' accounts and Infor Learning Management Online and Classroom course events. You can utilize this feature for multiple portals, levels, and events. This way, your employees can access their training material free of charge while external users such as business partners and customers will pay a specified fee to access their courses.

Administrators must first decide the portals in which they want to utilize e-Commerce. After this is set, a merchant account must be created with PayPal or AUTHORIZE.net. PayPal and AUTHORIZE.net are trusted and secure methods of sending and receiving payments. Most importantly, they protect and benefit merchants and consumers alike. You can configure your merchant account and shopping cart in Administrator after you set up an account with PayPal or AUTHORIZE.net.

To configure e-commerce:

1. Select **System > System hierarchy level > E-Commerce >** E-Commerce Configuration.
2. To configure PayPal checkout options:
   a. Click Pay Pal.
   b. Specify this information:

Server Url
Specify the PayPal transaction server URL.

Payment Data Transfer ID Token
Specify the Payment Data Transfer ID Token that you obtained from Configuring your PayPal account on page 318. Normally this ID Token can be found by returning to the Website Payment Preferences page and scrolling to the Payment Data Transfer section.

Email
Specify the e-mail address linked to your PayPal account.

c Click **Apply**.

3 To configure credit card payments:

a Click Credit Card.
b Specify your Service User Name, Transaction Key, and Server Url.
c To allow users to cancel purchased events, select the **Enable "Cancel Out" Link** check box.
d Click **Apply**.

Managing level course credit

Use Manage Level Course Credit to create credits for entire levels. These credits work like store credits. The credit is created with a fixed number of credits at the selected level. Then, specific courses are assigned to that credit. The Level Course Credit Amount must be greater than the amount of the assigned courses. A Credit Code is then created or generated for the course credit. When users of the level purchase the course, they will be asked for a coupon code. The users specify the Credit Code, and then the course gets added to their course list. As users spend the credit, the value decreases until it is depleted.

Users can only use a single course credit for each transaction. Users with multiple course credits will need to perform multiple transactions.

Caution: Credit codes can only be saved once you apply courses to the credit. If no courses are assigned to the credit, the credit code will not be saved.

To manage level course credit:

1 Select **System > Hierarchy level 2 or below > E-Commerce >** Manage Level Course Credit.

2 Specify this information:

Credit Amount
Specify a credit value.

Credit Code
Specify a credit code or to generate a credit code automatically, click **Generate**. If you choose to manually specify a credit code, you must specify a 10-character code that consists of letters A - Z and/or numbers 0 - 9. The system does not accept special characters.

3 To assign a course to the credit:
   a Click **New**.
   b Select a course from the item list.
   c Specify a credit value.
   d Click OK. Edit and Remove are displayed next to the course, in case you want to change the details of the credit or remove it.
   e Click **Apply**.

Adding a payment profile

Use Add Payment Profile to create new payment profiles for levels and users. Payment profiles specify payment methods and access terms for users. When you create payment profiles, you can set the period of time for which an account is valid, determine whether users will be charged for creating Infor Learning Management accounts, and customize payment profile notifications. You can also determine new user registration limitations, such as:

- **Unrestricted New User Registration** is the normal registration method, where users can register themselves for a Infor Learning Management account.
- **Require Manager Approval** can be used to require a manager's approval before a user's registration can be complete.
- **Set Payment or Access Terms** can be used to require users to pay an access fee in order to complete registration for an account.

You can create multiple payment profiles, and use one of them as the default for the system. You must set one payment profile as default for the system.

If you want to enable the PayPal / merchant payment option, make sure you have set up a PayPal or merchant account and specified the necessary information in Configuring e-commerce on page 319.

To add a payment profile:

1 Select **System > System hierarchy level > E-Commerce >** Manage Payment Profile **>** Add Payment Profile.
2 Specify a name.
3 To set the payment profile as the default for the system, select the **Set as Default Payment Profile** check box.
4 To allow users to pay using their PayPal accounts, select the **Pay Pal** check box.
5 To allow users to pay using a credit cared, select the **Credit Card** check box.
6 To allow users to pay by invoice, select the **Invoice** check box. The **Purchase Order # Required** and **Account # Required** check boxes are enabled:
   a Select the **Purchase Order # Required** check box to require users submit their purchase order numbers.
   b Select the **Account # Required** check box to require users to submit their account numbers.
7 Select a registration method:

a. To allow a user to register themselves for an account, select the **Unrestricted New User Registration** radio button.
b. To require a manager's approval before a user's registration can be complete, select the **Require Manager Approval** radio button.
c. To require users to pay an access fee in order to complete registration for an account, select the **Set Payment or Access Terms** radio button.

8 Select a currency from the **Currency** item list.

9 Specify this information:

Initial Access Term
Specify a number of days for the payment access term for new users. You can specify initial access terms only if the **Set Payment or Access Terms** radio button has been selected. To keep the registration period open, select the **Unlimited** check box.

Initial access Fee
To charge a fee for registering Infor Learning Management accounts, specify the amount you wish charge users.

Renewal Access Term
Specify the number of days for the renewal term period. You cannot specify renewal access terms if the **Require Manager Approval** or **Unrestricted New User Registration** radio button was selected and the **Unlimited** check box is selected.

Renewal Access Fee
To charge a renewal fee, specify the amount to charge.

Warn user at login X Days before expiration
Specify the number of days before account expiration that you want to warn users that their account is due to expire.

Your account will expire in
Specify the account expiration warning.

Send Notification
Specify the number of days before account expiration that you want to send the upcoming expiration message.

10 To customize the expiration warning:

a. Click the **Text** or **HTML** radio button.
b. Specify the upcoming expiration message.

11 To customize the user welcome message:

a. Click the **Text** or **HTML** radio button.
b. Specify the user welcome message.

12 To customize your account renewal notification:

a. Click the **Text** or **HTML** radio button.
b. Specify the account renewal message.

13 Click **Apply**.

Editing payment profile properties

Use Edit Payment Profile Properties to modify existing payment profiles for levels and users. You can also use this option to change the default payment profile. You must set one payment profile as default for the system.

Make sure you have set up a PayPal or merchant account and specified the necessary information in Configuring e-commerce on page 319 if you want to enable the PayPal / merchant payment option.

To edit payment profile properites:

1. Select **System > System hierarchy level > E-Commerce >** Manage Payment Profile **>** Edit Payment Profile Properties **> Payment profile**.
2. Specify a name.
3. To set the payment profile as the default payment profile for the system, select the **Default Payment Profile** check box.
4. To allow users to pay using their PayPal accounts, select the **Pay Pal** check box .
5. To allow users to pay using a credit cared, select the **Credit Card** check box.
6. To allow users to pay by invoice, select the **Invoice** check box. The **Purchase Order # Required** and **Account # Required** check boxes are enabled:
   a. Select the **Purchase Order # Required** check box to require users submit their purchase order numbers.
   b. Select the **Account # Required** check box to require users to submit their account numbers.
7. Select a registration method:
   a. To allow a user to register themselves for an account, select the **Unrestricted New User Registration** radio button.
   b. To require a manager's approval before a user's registration can be complete, select the **Require Manager Approval** radio button.
   c. To require users to pay an access fee in order to complete registration for an account, select the **Set Payment or Access Terms** radio button.
8. Select a currency from the **Currency** item list.
9. Specify this information:

   Initial Access Term
   Specify a number of days for the payment access term for new users. You can specify initial access terms only if the **Set Payment or Access Terms** radio button has been selected. To keep the registration period open, select the **Unlimited** check box.

   Initial access Fee
   To charge a fee for registering Infor Learning Management accounts, specify the amount you wish charge users.

   Renewal Access Term
   Specify the number of days for the renewal term period. You cannot specify renewal access terms if the **Require Manager Approval** or **Unrestricted New User Registration** radio button was selected and the **Unlimited** check box is selected.

Renewal Access Fee
To charge a renewal fee, specify the amount to charge.

Warn user at login X Days before expiration
Specify the number of days before account expiration that you want to warn users that their account is due to expire.

Your account will expire in
Specify the account expiration warning.

Send Notification
Specify the number of days before account expiration that you want to send the upcoming expiration message.

10. To customize the expiration warning:
    a. Click the **Text** or **HTML** radio button.
    b. Specify the upcoming expiration message.
11. To customize the user welcome message:
    a. Click the **Text** or **HTML** radio button.
    b. Specify the user welcome message.
12. To customize your account renewal notification:
    a. Click the **Text** or **HTML** radio button.
    b. Specify the account renewal message.
13. Click **Apply**.

Removing a payment profile

Use Remove Payment Profile to delete a payment profile. Please use caution when removing payment profiles since it is an irreversible action. Users that have been assigned to the deleted payment profile will be assigned to the default payment profile.

You cannot remove the default payment profile. If this is the payment profile you want to remove from the system, assign a new default payment profile, then remove the desired payment profile.

To remove a payment profile:

1. Select **System > System hierarchy level > E-Commerce >** Manage Payment Profile **>** Remove Payment Profile **> Payment profile**.
2. Click **Remove**. A confirmation dialog box is displayed.
3. Click **OK**.

Associating a payment profile with levels

Use Associate Payment Profile with Levels to assign each level a different payment profile. You can assign a payment profile to every level in the Hierarchy or you can assign a paument profile to multiple levels at once. The benefit of this feature depends on your Hierarchy configuration. A company that gives Infor Learning Management access to employees and customers may want to only charge customers for Infor Learning Management access and courses. Therefore, you can create a payment profile that gives employees free access to Infor Learning Management and the courses available within, and another payment profile that charges customers for Infor Learning Management access and courses available within. Payment profiles are created using Add Payment Profile, and assigned to levels using Associate Payment Profile with Levels option.

To associate a payment profile with levels:

1. Select **System > System hierarchy level > E-Commerce >** Manage Payment Profile **>** Associate Payment Profiles with Levels.
2. Select a level.
3. Select a payment profile from the item list.
4. To remove a payment profile from the level, select **None** from the item list.
5. Click **Apply**.

Changing the assigned payment profile

Payment profiles are usually assigned on a level basis. However, you can use Change Assigned Payment Profile to assign a payment profile to a particular user or group of users.

To change the assigned payment profile:

1. Select **System > Hierarchy level > E-Commerce >** Manage Payment Profile **>** Change Assigned Payment Profile **> Payment profile**.
2. Specify this information:

   Show Users Registered between
   Specify dates between which users' accounts were added, to search for users who registered within a specific timeframe. You may also select **All Registration Dates** check box to search for all registered users.

   Beginning with
   Specify search text to locate one or more users that you wish to change. You can also select **Show All** to view all users.

3. Select the check box for the user.
4. Click **Next**.
5. Select the payment profile from the **Select new payment profile** item list.
6. Click **Finish**.

Changing the assigned access term

Use Change Assigned Access Term to update the period of time that users have access to Infor Learning Management during their initial and renewal periods. You can then extend or limit access terms for particular users.

Only payment profiles that require payment or have access term limits are displayed.

To change the assigned access term:

1. Select **System > Hierarchy level > E-Commerce >** Manage Payment Profile **>** Change Assigned Access Term **> Payment profile**.
2. Specify this information:

   Show Users Registered between
   Specify dates between which users' accounts were added, to search for users who registered within a specific timeframe. You may also select **All Registration Dates** check box to search for all registered users.

   Beginning with
   Specify search text to locate one or more users that you wish to change. You can also select **Show All** to view all users.

3. Select the check box for the user.
4. Click **Next**.
5. To update users who are in their initial access period:
   a. Select the **Initial Term Users** check box.
   b. Specify the access period extension by specifying a number of days or a deadline.
6. To update users who are in their renewal access period:
   a. Select the **Renewal Term Users** check box.
   b. Specify the access period extension by specifying a number of days or a deadline.
7. Click **Finish**.

Adding a coupon

Use Add Coupon to offer users discounted prices for their courses. Coupons can mark down course event prices by taking either a percentage or a fixed amount off the total event price. Coupons can be used as a reward system for frequency of use, or for accomplishments.

To add a coupon:

1. Select **System > System hierarchy level > E-Commerce >** Manage Coupons **>** Add Coupon.
2. Specify this information:

Code
Specify a coupon ID. To automatically generate a coupon code, select **Generate**. If you choose to specify a coupon ID manually into the Code field, it may contain up to 10 characters consisting of numbers 0 – 9, and letters A –Z. The system does not accept special characters.

Coupon Type
Select **Fixed amount off purchase** or **Percent off purchase**.

Discount
Specify the percentage or the discount amount.

Number of Use
Specify the number of times the coupon can be used.

3. Specify the start and end date for which the coupon is valid.
4. Click **Add**.

Editing coupons

Use Edit Coupons to modify the settings of existing coupons to meet your needs. You can update the discount amount, number of uses, or end date.

To edit coupons:

1. Select **System > System hierarchy level > E-Commerce >** Manage Coupons **>** Edit Coupons **> Coupon name**.
2. Specify this information:

   Code
   Specify a coupon ID. To automatically generate a coupon code, select **Generate**. If you choose to specify a coupon ID manually into the Code field, it may contain up to 10 characters consisting of numbers 0 – 9, and letters A –Z. The system does not accept special characters.

   Coupon Type
   Select **Fixed amount off purchase** or **Percent off purchase**.

   Discount
   Specify the percentage or the discount amount.

   Number of Use
   Specify the number of times the coupon can be used.

3. Specify the start and end date for which the coupon is valid.
4. Click **Apply**.

Adding a notification

Use **Add Notification** to create custom notifications to send to users in a particular level and the levels below it. Level Notifications are used to send custom notifications to all users that reside in a given level. If the notification is invoked from the System level, then every user in Infor Learning Management will receive the notification. If the notification is invoked from a level below the System level, then all users in that level and the levels below it will receive the notification.

To add a notification:

1. Select **System > Hierarchy level > Notification Configuration >** Level Notifications **> Add Notification**.
2. Specify the subject of the notification.
3. To determine the message format, select the **Text** or **HTML** radio button. If HTML is selected, a formatting toolbar is displayed so you can use Microsoft Word-like features to format and edit your notifications.
4. Specify the body of the message, the date and time that it should be sent, the e-mail address of the sender, and the name of the sender.
5. Specify this information:

   Carbon Copy Email Address
   To send the notification to someone other than the members of the selected level, specify their e-mail address.

   Carbon Copy Name
   Specify a name to include the name of the person receiving the carbon copy e-mail.

6. Click **Add**.

Viewing notifications

Use **View Notifications** to view notifications that are scheduled to be sent at a future date. You cannot view notifications that already have been sent.

To view notifications:

1. Select **System > Hierarchy level > Notification Configuration >** Level Notifications **> View Notifications**.
2. Select a notification to view from the item list. The information is displayed.

Editing notifications

Use **Edit Notifications** to edit notifications that are scheduled to be sent at a future date. Notifications that have already been sent cannot be modified.

To edit notifications:

1. Select **System > Hierarchy level > Notification Configuration >** Level Notifications **> Edit Notifications**.
2. Select the notification from the **Level** item list.
3. Specify the subject of the notification.
4. To determine the message format, select the **Text** or **HTML** radio button. If HTML is selected, a formatting toolbar is displayed so you can use Microsoft Word-like features to format and edit your notifications.
5. Specify the body of the message, the date and time that it should be sent, the e-mail address of the sender, and the name of the sender.
6. Specify this information:

   Carbon Copy Email Address
   To send the notification to someone other than the members of the selected level, specify their e-mail address.

   Carbon Copy Name
   Specify a name to include the name of the person receiving the carbon copy e-mail.

7. Click **Add**.

Removing notifications

Use **Remove Notifications** to delete notifications that are scheduled to be sent at a future date. Because this action cannot be reversed, you need to use caution when deleting notifications.

To remove notifications:

1. Select **System > Hierarchy level > Notification Configuration >** Level Notifications **> Remove Notifications**.
2. Select the notification you want to remove from the **Level** item list.
3. Click **Delete Notification**. A confirmation dialog box is displayed.
4. Click **OK**.

Managing notification profiles

Use Manage Notification Profiles to edit a default notification or to add, edit, or remove a custom notification.

To manage notification profiles:

1. Select **System > System hierarchy level > Notification Configuration >** Manage Notification Profiles.
2. Select the type of notification from the **Type** item list.
3. To set the notification as default, click the check icon in the Default column.
4. To enable the notification, select the **Enabled** check box.
5. Click a notification to view the details of the notification. The **View Profile Details** page is displayed.
6. To edit the details of the notification, click the edit icon. The **Edit Profile Details** page is displayed.
7. To remove the notification, click the delete icon. It is not possible to delete the original notifications that are part of the Infor Learning Management implementation. The delete icon on these notifications is not enabled. Only custom notifications that have been made by the system administrators can be deleted.

Viewing notification settings

Use View to view the settings for a specific notification. This page also includes the tracking information such as the original author, date of creation, the name of the last person who modified the data and the date of last modification.

To view notification settings, select **System > System hierarchy level > Notification Configuration >** Manage Notification Profiles **> Notification name.**

Editing notification settings

Use **Edit** to change the settings for a specific notification. This topic describes all possible options that may be displayed on this screen. Not all items will be available on each notification.

The **Type** item list is displayed for informational purposes only and cannot be changed. If you are editing a custom notification, the name of the default notification that was used as a template for the custom notification is displayed.

To edit notification settings:

1. Select **System > System hierarchy level > Notification Configuration >** Manage Notification Profiles.
2. Select the notification type from **Type** item list.
3. To edit the details of the notification, click the edit icon. The **Edit Profile Details** page is displayed.
4. Specify a name.

5 To enable the notification, select **Enabled** check box.
6 To use a user's FROM information, select the **Use a User’s FROM Information When Sending Notifications** check box.
7 To send notifications only when a user completes a certification by completing courses, select the **Send notifications only when users complete certification programs by taking courses** check box.
8 To send the notification as a Microsoft Outlook meeting request, select the **Send as Outlook Meeting Request** check box.
9 To send notifications only for events with classroom portions, select the **Only Send Notifications for Events with Classroom Portions** check box.
10 To determine who will receive the notification, select from the **Send Notification** to item list.
11 To set the language template for the notification, select it from the **Template Language** item list.
12 To determine the message format, select the **Text** or **HTML** radio button. If HTML is selected, a formatting toolbar is displayed so you can use Microsoft Word-like features to format and edit your notifications.
13 Specify the body of the message. A list of tokens that are relevant to the current notification are displayed below the field. You can insert these tokens into the notification text in the Message Body field to have relevant information dynamically inserted into the notification when it is sent.
14 Click **Save**.

Removing a notification

Use Remove to delete a custom notification that has been created by an administrator.

It is not possible to delete the original notifications that are part of the Infor Learning Management implementation. The delete icon on these notifications will not be enabled.

Only custom notifications that have been made by a system administrator can be deleted.

To remove a notification:

1 Select **System > System hierarchy level > Notification Configuration >** Manage Notification Profiles.
2 Select the notification type from **Type** item list.
3 Choose one of the following removal methods:
   - To remove a notification:
     a Click the delete icon.
     b Click **Yes** to confirm the deletion.
   - To view the details of a notification prior to removing it:
     a Click the notification.
     b Review the details of the notification.
     c Click Remove.
     d Click **Yes** to confirm.

Assigning users to a notification

Use Assign Users to manage the users who are assigned to a custom notification.

All users are assigned to the default notifications. It is not possible to assign or remove users from them.

If you need to limit the number of users that receive a notification, create a custom notification that meets your needs and disable the default notification.

To assign users to a notification:

1. Select **System > System hierarchy level > Notification Configuration >** Manage Notification Profiles.
2. Select the notification type from **Type** list.
3. Select the notification. The **View** page is displayed.
4. Select Assign Users.
5. To have all available users are displayed, click the search icon.
6. To use the search options to find specific users:
   a. Click Add criteria.
   b. Select a data field.
   c. Select a logical operator.
   d. Specify the search text in the field.

      For example, to search for all users with the last name Smith: Select **Last Name** from the first item list, select **Equal** to from the second item list, and specify Smith in the final field.
   e. To add additional criteria, repeat this process.
7. Click **Assign**.
8. Select the check box for the user.

Removing users from a notification

Use Assign Users to manage the users who are assigned to a custom notification.

All users are assigned to the default notifications. It is not possible to assign or remove users from them.

If you wish to limit the number of users that receive a notification, create a custom notification that meets your needs and disable the default notification.

To remove a user from a notification:

1. Select **System > System hierarchy level > Notification Configuration >** Manage Notification Profiles.
2. Select the notification type from **Type** item list.
3. Click the notification. The **View** page is displayed.
4. Select Assign Users.

5 To have all available users are displayed, click the search icon.

6 To use the search options to find specific users:

   a Click Add criteria.

   b Select a data field.

   c Select a logical operator.

   d Specify the search text in the field.

      For example, to search for all users with the last name Smith: Select **Last Name** from the first item list, select **Equal** to from the second item list, and specify Smith in the final field.

   e To add additional criteria, repeat this process.

7 Select the check box for the user.

8 Click **Remove**.

Adding custom fields

Use Add Custom Fields to create new fields that are displayed on the **Add Level** screen. Use these custom fields to generate reports based on your levels. After you are finished, you can view all of the Level Custom Fields in the content area.

To add a custom field:

1 Select **System > Hierarchy level > Custom Fields >** Level Custom Fields **>** Add Custom Fields.

2 Specify a name and description.

3 To make the custom field a free text field, select the **Free Text Field** check box.

4 Click **Add**.

Viewing custom fields

Use View Custom Fields to view a list of level custom fields and associated values that have already been created.

To view custom fields:

1 Select **System > Hierarchy level > Custom Fields >** Level Custom Fields **>** View Custom Fields **> Custom field name**.

2 View the names and descriptions of the fields.

Editing custom fields

Use Edit Custom Fields, to modify existing custom level field names and descriptions.

To edit custom fields:

1 Select **System > Hierarchy level > Custom Fields >** Level Custom Fields **>** Edit Custom Fields **> Custom field name**.
2 Specify a name and description.
3 Click **Update**.

Localizing custom fields

Use Localize Custom Fields to reuse an existing custom field under a different name in the currently selected level. If a preexisting custom field and its associated field values are desired for a selected level, but the field needs to be renamed, for translation purposes for example, you can use this option.

Custom fields can only be localized from the parent and child levels of the currently selected level. Localizations will be reflected in both the parent and child levels of the selected level.

To localize a custom field:

1 Select **System > Hierarchy level 2 or below > Custom Fields >** Level Custom Fields **>** Localize Custom Fields **> Custom field name**.
2 Specify this information:

   Rename
   Specify the name to be used for the localized custom field.

3 Click **Update**.

Removing a custom field

Use Remove Custom Fields to remove a custom field, if you no longer want it to be displayed.

Caution: After you remove a custom field you, can not recover it and any data associated with that custom field will also be deleted. Proceed with caution.

To remove a custom field:

1 Select **System > Hierarchy level > Custom Fields >** Level Custom Fields **>** Remove Custom Fields **> Custom field name**.
2 Click **Remove**. A confirmation dialog box is displayed.
3 Click **OK**.

Adding a custom field value

Use Add Custom Field Value to associate values with your level custom fields. Then, administrators can choose the field information from an item list of the values that you specify. The values that are already associated with the level custom field are displayed in the content area.

To add a custom field value:

1. Select **System > Hierarchy level > Custom Fields >** Level Custom Fields **>** Add Custom Field Value **> Custom field name**.
2. Specify a name and description.
3. Click **Add**.

Editing custom field values

Use the Edit Custom Field Values to modify the names and descriptions of field values that have already been created.

To edit custom field values:

1. Select **System > Hierarchy level > Custom Fields >** Level Custom Fields **>** Edit Custom Field Values **> Custom field name**.
2. Select the checkbox for the value.
3. Specify the name and description of the value.
4. Click **Update**.

Removing a custom field value

Use Remove Custom Field Values to remove custom field values that are no longer necessary or applicable .

Caution: After you remove a custom field value you can not recover it. Proceed with caution.

To remove a custom field value:

1. Select **System > Hierarchy level > Custom Fields >** Level Custom Fields **>** Remove Custom Field Values **> Custom field name**.
2. Select the check box for the custom field.
3. Click **Remove**. A confirmation dialog box is displayed.
4. Click **OK**.

Adding a curricula custom field

Use Add Custom Field to create new fields that will apply to a selected curriculum. Custom Fields in Curricula give you the opportunity to “flag” curricula with a unique text identifier so that information can be gathered and filtered based on the identifier. This data field is for identification purposes only. Custom reports can be built to filter this data.

To add a curricula custom field:

1. Select **System > Hierarchy level > Custom Fields >** Curricula Custom Fields **>** Add Custom Field.
2. Specify a name and description.
3. To determine the scope of the custom field, click the **Level Specific** or **System Wide** radio button.
4. To make the field a free text field, select the **Free Text Field** check box.
5. Click **Add**.

Viewing curricula custom fields

Use View Custom Fields to view a list of curricula custom fields and associated values that have already been created.

To view curricula custom fields:

1. Select **System > Hierarchy level > Custom Fields >** Curricula Custom Fields **>** View Custom Fields **> Custom field name**.
2. View the information.

Editing curricula custom fields

Use Edit Custom Fields to change the names and descriptions of existing custom curricula fields.

The scope of custom curricula fields can not be changed using this option, nor can whether a custom curricula field is a free text field or not be changed.

To edit a curricula custom field:

1. Select **System > Hierarchy level > Custom Fields >** Curricula Custom Fields **>** Edit Custom Fields **> Custom field name**.
2. Specify the name and description.
3. Click **Update**.

Localizing curricula custom fields

Use Localize Custom Fields to reuse an existing custom field under a different name in the currently selected level. If a preexisting custom field and its associated field values are desired for a selected level, but the field needs to be renamed, for translation purposes for example, you can use this option.

Custom fields can only be localized from the parent and child levels of the currently selected level. Localizations will be reflected in both the parent and child levels of the selected level.

To localize a curricula custom field:

1. Select **System > Hierarchy level 2 or below > Custom Fields >** Curricula Custom Fields **>** Localize Custom Fields **> Custom field name**.
2. Specify the localized name in the Rename field.
3. Click **Update**.

Removing a curricula custom field

Use Remove Custom Fields, to remove a custom field that you do not want displayed.

Caution: After you remove a custom field you can not recover it and any data associated with that custom field will also be deleted. Proceed with caution.

To remove a curricula custom field:

1. Select **System > Hierarchy level > Custom Fields >** Curricula Custom Fields **>** Remove Custom Fields **> Custom field name**.
2. Click **Remove**.

Adding a curricula custom field value

Use Add Custom Field Value to associate values with custom curricula fields. This allows users to choose from an item list of values you specify in advance.

To add a curricula custom field value:

1. Select **System > Hierarchy level > Custom Fields >** Curricula Custom Fields **>** Add Custom Field Value **> Custom field name**.
2. Specify a Name and Description.
3. Click **Add**.

Editing curricula custom field values

Use Edit Custom Field Values to change the names and descriptions of the custom curricula field values have already been created.

To edit a curricula custom field:

1. Select **System > Hierarchy level > Custom Fields >** Curricula Custom Fields **>** Edit Custom Field Values **> Custom field name**.
2. Select the check box for the value.
3. Specify the Value Name and Description.
4. Click **Update**.

Removing curricula custom fields

Use Remove Custom Field Values to remove custom field values that are no longer necessary or applicable.

Caution: After you remove a custom field value, you can not recover it. Proceed with caution.

To remove a curricula custom field:

1. Select **System > Hierarchy level > Custom Fields >** Curricula Custom Fields **>** Remove Custom Field Values **> Custom field name**.
2. Select the check box for the custom field.
3. Click **Remove**.

Adding a course custom field

Use Add Custom Fields to create new custom fields. Custom Fields in Courses give you the opportunity to “flag” a course with a unique text identifier so that information can be gathered and filtered based on the identifier. This data field is for identification purposes only. Custom reports can be built to filter this data.

To add a course custom field:

1. Select **System > Hierarchy level > Custom Fields >** Course Custom Fields **>** Add Custom Field.
2. Specify a Name and Description.
3. To determine the scope of the custom field, click the **Level Specific** or **System Wide** radio button.
4. To make the field a free text field, select the **Free Text Field** check box.
5. Click **Add**.

Viewing course custom fields

Use View Custom Fields to view a list of course custom fields and associated values that have already been created.

To view course custom fields:

1. Select **System > Hierarchy level > Custom Fields >** Course Custom Fields **>** View Custom Fields **> Custom field name**.
2. View the information that is displayed.

Editing course custom fields

Use Edit Custom Fields to change the names and descriptions of existing custom course fields.

The scope of custom course fields can not be changed using this option, nor can whether a custom course field is a free text field or not be changed.

To edit a course custom field:

1. Select **System > Hierarchy level > Custom Fields >** Course Custom Fields **>** Edit Custom Fields **> Custom field name**.
2. Specify a Name and Description.
3. Click **Update**.

Localizing course custom fields

Use Localize Custom Fields to reuse an existing custom field under a different name in the currently selected level. If a preexisting custom field and its associated field values are desired for a selected level, but the field needs to be renamed, for translation purposes for example, you can use this option.

Custom fields can only be localized from the parent and child levels of the currently selected level. Localizations will be reflected in both the parent and child levels of the selected level.

To localize a course custom field:

1. Select **System > Hierarchy level 2 or below > Custom Fields >** Course Custom Fields **>** Localize Custom Fields **> Custom field name**.
2. Specify the localized name in the Rename field.
3. Click **Update**.

Removing course custom fields

Use Remove Custom Fields to remove a custom field that you no longer want displayed.

Caution: Once you remove a custom field you can not recover it, and any data associated with that custom field will also be deleted. Proceed with caution.

To remove course custom fields:

1. Select **System > Hierarchy level > Custom Fields >** Course Custom Fields **>** Remove Custom Fields **> Custom field name**.
2. Click **Remove**.

Adding a course custom field value

Use Add Custom Field Value to associate values with your custom fields. This allows users to choose from an item list of values you specified in advance.

To add a course custom field value:

1. Select **System > Hierarchy level > Custom Fields >** Course Custom Fields **>** Add Custom Field Value **> Custom field name**.
2. Specify the Name and Description.
3. Click **Add**.

Editing course custom field values

Use Edit Custom Field Values to change the names and descriptions of course field values that have already been created.

To edit a course custom field value:

1. Select **System > Hierarchy level > Custom Fields >** Course Custom Fields **>** Edit Custom Field Values **> Custom field name**.
2. Select the check box for the value.
3. Specify the Name and Description.
4. Click **Update**.

Removing course custom field values

Use Remove Custom Field Values to remove custom field values that are no longer necessary or applicable.

Caution: After you remove a custom field value you can not recover it. Proceed with caution.

To remove a course custom field value:

1 Select **System > Hierarchy level > Custom Fields >** Course Custom Fields **>** Remove Custom Field Values **> Custom field name**.
2 Select the check box for the custom field value.
3 Click **Remove**.

Adding an event custom field

Use Add Custom Field to create new custom fields. Custom Fields in Events give you the opportunity to “flag” the course event with a unique text identifier so that information can be gathered and filtered based on the identifier. This data field is for identification purposes only. Custom reports can be built to filter this data.

To add an event custom field:

1 Select **System > Hierarchy level > Custom Fields >** Event Custom Fields **>** Add Custom Field.
2 Specify a Name and Description.
3 To determine the scope of the custom field, click the **Level Specific** or **System Wide** radio button.
4 To make the field a free text field, select the **Free Text Field** check box.
5 Click **Add**.

Viewing event custom fields

Use View Custom Fields to view a list of event custom fields and associated values that have already been created.

To view event custom fields:

1 Select **System > Hierarchy level > Custom Fields >** Event Custom Fields **>** View Custom Fields **> Custom field name**.
2 View the information that is displayed.

Editing event custom fields

Use Edit Custom Fields to change the names and descriptions of existing custom event fields.

The scope of custom course fields can not be changed using this option, nor can whether a custom course field is a free text field or not be changed.

To edit an even custom field:

1. Select **System > Hierarchy level > Custom Fields >** Event Custom Fields **>** Edit Custom Fields **> Custom field name**.
2. Specify a Name and Description.
3. Click **Update**.

Localizing event custom fields

Use Localize Custom Fields to reuse an existing custom field under a different name in the currently selected level. If a preexisting custom field and its associated field values are desired for a selected level, but the field needs to be renamed, for translation purposes for example, you can use this option.

Custom fields can only be localized from the parent and child levels of the currently selected level. Localizations will be reflected in both the parent and child levels of the selected level.

To localize an event custom field:

1. Select **System > Hierarchy level 2 or below > Custom Fields >** Event Custom Fields **>** Localize Custom Fields **> Custom field name**.
2. Specify the localized name in the Rename field.
3. Click **Update**.

Removing event custom fields

Use Remove Custom Fields to remove a custom field if you no longer want it displayed.

Caution: After you remove a custom field you can not recover it, and any data associated with that custom field will also be deleted. Proceed with caution.

To remove an event custom field:

1. Select **System > Hierarchy level > Custom Fields >** Event Custom Fields **>** Remove Custom Fields **> Custom field name**.
2. Click **Remove**. A confirmation message is displayed.
3. Click **OK**.

Adding an event custom field value

Use Add Custom Field Value to associate values with your custom event fields. This allows users to choose from an item list of values you specified in advance.

To add an event custom field value:

1. Select **System > Hierarchy level > Custom Fields >** Event Custom Fields **>** Add Custom Field Value **> Custom field name**.
2. Specify a Name and Description.
3. Click **Add**.

Editing event custom field values

Use Edit Custom Field Values to change the names and descriptions of event values that have already been created.

To edit event custom field values:

1. Select **System > Hierarchy level > Custom Fields >** Event Custom Fields **>** Edit Custom Field Values **> Custom field name**.
2. Select the check box for the value.
3. Specify a Name and Description.
4. Click **Update**.

Removing event custom field values

Use Remove Custom Field Values to remove custom field values that are no longer necessary or applicable .

Caution: After you remove a custom field value you can not recover it. Proceed with caution.

To remove event custom field values:

1. Select **System > Hierarchy level > Custom Fields >** Event Custom Fields **>** Remove Custom Field Values **> Custom field name**.
2. Select the check box for the custom field value.
3. Click **Remove**. A confirmation message is displayed.
4. Click **OK**.

SCORM course overview

Infor Learning Management is integrated with a comprehensive SCORM engine to fully support SCORM 1.2 and all four editions of 2004. As a SCORM-compliant product, Infor Learning Management is designed to import all third party SCORM courses that are either 1.2- or 2004-compliant. In addition, all courses created using Infor Learning Management Content Creator can be exported as SCORM 1.2 or 2004 and opened with other systems.

In both situations where you begin an imported SCORM course in Infor Learning Management or begin an exported Infor Learning Management SCORM course in another system, the look and feel is preserved for end-users. Depending on the content vendor or development tool used, each SCORM course that is imported into Infor Learning Management can vary in terms of supported features and functionalities. For that reason, there is an extensive list of communication calls in Infor Learning Management to retrieve such information from the SCORM course content/data. Infor Learning Management courses that are exported as SCORM 1.2 or 2004 also have a set of communication calls that pass information to the system that is playing the course.

See Exporting SCORM courses on page 351 for more information about exporting Infor Learning Management courses to SCORM 1.2 or 2004.

The Infor Learning Management SCORM Player is designed so that SCORM 1.2- and 2004-compliant Sharable Content Objects (SCOs), can be displayed and tracked. SCORM 1.2- and 2004-compliant SCOs can be imported to Administrator and launched in the Infor Learning Management SCORM Player from the Infor Learning Management Portal. The Infor Learning Management SCORM Player has these capabilities:

- Navigation between SCOs by use of item lists or navigation buttons.
- Integrated with a SCORM Adapter that is used by the content to communicate with the server.
- Saves the position of the last SCO viewed by the user.
- SCOs are treated as online courses in the Infor Learning Management system. The course opens in the Infor Learning Management SCORM Player after the user clicks Launch Online from the Infor Learning Management Portal.

Tracking SCORM course data

Exported SCORM courses track this data:

- The position of last page visited
- CMI Elements:
  - cmi.core.score.raw
  - cmi.core.score.max
  - cmi.core.score.min
  - cmi.core.exit
  - cmi.suspend_data
  - cmi.core.lesson_status
  - cmi.core.lesson_location
- Lesson status (complete or incomplete)

Importing SCORM and AICC courses

SCORM and AICC courses are imported the same way as all other courses, see Importing a course on page 84 for more information.

Finalizing and testing the course

The course must be accessible under the Courses page in order to launch it.

1. Select **Courses > System level > Course Management Wizard**.
2. To work with an existing course, select **Select an Existing Course** and select the course. To create a new course, select **Create a New Course**.
3. Click **Next**.
4. Validate course information if you selected an existing course or specify the information for a new course.
5. Click **Next**.
6. Select **Create a New Event** or **Select an Existing Event**.
7. Click **Next**.
8. Validate event information if you selected an existing event or specify the information for a new event.
9. Click **Browse** and select the event file to upload
10. Click **Next**.
11. Validate **ILM Course Portion** availability dates.
12. Select **Online Portion** and specify the availability dates.
13. Click **Next**.
14. If classroom learning is used for this course, select **Classroom Portion** and specify the classroom information.
15. Click **Next**.
16. If there is a course completion deadline, select **Enable Completion Deadline** and specify the deadline information.
17. Click **Next**.
18. Select hierarchy levels to which you are adding the course, or select the levels from which you are removing the course.

    At least one level 2 must be selected.
19. Click **Next**.
20. To change the event properties for a level, select the level from the list and select the appropriate options for that level.
21. Click **Next**.
22. To change the event price for a level, select the level from the list and specify the price **Amount** and **Currency**.

23 Click **Next**.

24 If the course status is not Active, click **Make Course Active**. If you do not wish to make this course active, click **Make Course Inactive.**

Depending on your initial selection, the button availability will vary.

At this point, you should be able to locate your course in the Portal on the Courses page. If you set the course as Default, the students will be auto-enrolled. If you set it to self-registration, the students will need to register for the course before launching it. To take the course, click **Launch Course**.

The course opens in a new window. The way in which the course is displayed varies depending on the tool that was used to create it, the vendor who created it, or the standard used (SCORM vs. AICC):

SCORM	AICC
• This content runs through a dedicated SCORM player that is part of the system • The look and feel of this content and launch behavior is controlled by the tool that was used to create it. • The core course requirements of tracking, such as the number of course or exam attempts and structure (single SCO vs. multiple SCOs), are managed by the tool that was used to create it. This information is stored in an IMSManifest.xml file that is imported into the system. Any major changes that update the IMSManifest.xml typically require the course be re-imported. • In most cases, the content is stored and managed by the system after it has been initially imported. Advanced authors can choose to replace individual files in the course.	• This content runs from an external content server. Data tracking is performed by the system to which the server is linked. • The look and feel of this content and launch behavior is controlled by the external content server. • The uptime and availability of this content is controlled by the external content server.

Validating course tracking

Complete these scenarios to validate that the course is properly tracked in the system.

1 Take the course but do not complete it. Both the Course and Transcript pages should show that the course is In Progress.

2 Take the course and complete it. Both the Course and Transcript pages should show that the course is Complete (or Passed/Failed if there is a score).

3 Re-launch the course and complete it again. The status of the Course and Transcript pages either remains Passed/Completed or changes to Failed if you did not pass the exam. Previous scoring attempts are displayed when the View Details link is clicked.

Course completion logic

The way in which the course is displayed on a user's transcript and in reports is dictated by the way the three major course statuses are interpreted by the system.

Course Statuses:

- Completion Status: The statuses of Complete and Incomplete dictate the students' overall completion of the course. This is a required status for all standards to be determined by the system.
- Success Status: The statuses of Passed and Failed are controlled by either a lesson status or success status depending on the standard. If this status is unknown, the passing score set for the course in the system upon import is used.
- Score: If the course has an exam, quiz, rollup score, etc., then this value needs to be sent and tracked in the system.

Base Completion Logic:

Completion Status	Success Status	Score	Course Status on Transcript	Notes
Completed	Passed	Unknown	Complete	Course credit with a date scored is assigned to the user by the system
Completed	Unknown	Unknown	Complete	Course credit with a date scored is assigned to the user by the system
Completed	Unknown	Zero or greater	Passed/Failed	The External Test Passing Score value is captured by the system
Unknown	Unknown	Zero or greater	Passed/Failed	The External Test Passing Score value is captured by the system

Editing SCORM package properties

1. Select **Courses > Hierarchy Level > Course > More Options > Edit SCORM Package Properties**.
2. Specify SCORM Player settings:

Use reporting heuristics settings to manage course status	Manages tracking and completion logic of the course
Navigational Controls	Select SCORM Player controls
Launch Behavior	Select SCORM Player launch behavior settings

Rudimentary Sequencing	Specify settings that control the actions the SCORM Player takes when SCO exits. These settings are not applicable to SCORM 2004 courses since SCORM 2004 Simple Sequencing allows the content to specify these behaviors. There are three factors the SCORM Player looks at when determining the action to take when a SCO exits: the position of the SCO in the course, the state of the SCO/Course, and the SCORM exit type specified by the SCO. **Note:** These settings take affect only when the content originates an exit action by calling LMSFinish before the learner initiates an exit action by using a navigational control in the SCORM Player.
Rudimentary Rollup	Select Course scoring settings. These settings are not applicable to SCORM 2004 courses since SCORM 2004 Simple Sequencing allows the content to specify these behaviors.
Compatibility Settings	Select SCORM Player compatibility settings
Communication Settings	Select settings for saving the course status
Debugger Options	Select settings for the client:side (browser) logging
History Options	Select history collection settings
Reporting Heuristics	Select settings that give hints to allow more intelligent reporting on course status
Presets	Create a new preset based on your currently configured package properties or to apply previously created settings.

3 Click **Save**.

Updating the course

Whenever you need to update the course content with new information or for troubleshooting purposes, you can replace the entire course package or replace individual package files.

Replacing the course package

These steps are used to update a SCORM or an AICC course in the system without deleting it and to preserve the user's transcript (scoring history).

1 Select **Courses > Hierarchy Level > Course > More Options > Remove Online Portion Content**.
2 Click **Delete.**

> **Caution:** Performing this task resets the data table of the Ad Hoc Reporting View SCORMResponseData_v. This view contains data about specific question responses and other granular tracking data. All other reporting views are preserved.

3 Select **Add Online Portion Content**.
4 To add an event, select **Add Event** and select the event template.
5 To import a course from a .zip file:
   a Click **Browse file**.
   b Select the zip file containing the course.
   c Click **Import Course(s)**.
6 To import a SCORM course from a URL:
   a Specify the full URL, including the file name and file type extension, in the **Manifest URL** field.
   b Click **Import Course(s)**.

Replacing individual package files

Individual files can be replaced within a content repository viewer. You can delete and add the individual files in the repository within the content folder on the server. Manual updates cannot be performed in root folders.

> **Caution:** Use this method to make cosmetic changes to the course. For any changes to the imsmanifest.xml file or to the core logic of the course, you must use the standard method to replace the entire course package.

1 Select **Courses > Hierarchy Level > Online Courses > Manage SCORM Course Repository > Course name**.
2 Select the file and click the red **X**.
3 Click **+ Upload** and select the file to upload.

AICC Export

You must create a separate level for each external LMS with the required courses. This ensures that the accounts are created on the correct level in the system for license tracking and other reporting purposes when the new users launch those courses. Perform export AICC steps from the dedicated hierarchy level.

1 Select **System > Hierarchy Level > Import/Export > AICC Export**.
2 Select the courses to export.
3 Click **Export**.
4 To save the AICC zip file, click Download.

SCORM Export Overview

You can use SCORM Export to convert Content Creator courses into a SCORM standard. To export a course, the course has to be Active and have at least one event scheduled. After the SCORM Export is complete, a zip file is created. Any system that supports SCORM standard can run the course. SCORM version 1.2 and 2004 are currently supported in Infor Learning Management.

To retain the consistency between Infor Learning Management courses and their SCORM counterpart, the interface of the SCORM courses are similar to that of Infor Learning Management Learner. These SCOs are portable and can run in a SCORM 1.2- or 2004-compliant player provided by a third-party learning management system vendor.

Courses that are exported using the SCORM Export Utility maintain these functionalities when run in a SCORM player:

- Course Completion and Assessment Rules & Settings
- Tokens and Popups
- Learning Object links
- Rollovers and Flash interactions
- Multimedia, documents, and other repository links
- Group file structures in the Repository
- Feedback, Reset, and Submit functionality
- Previous and Next navigation
- Search functionality
- Question Pools and Roadmap. This feature is supported within the active session.
- Bookmarks and History. This feature is supported within the active session.

ILM SCORM Player does not support Infor Learning Management Learner these functionalities:

- Forums
- Comments & Evaluations
- Answers for each question that submitted by the user. After a user clicks **Submit** within an assessment, the score is sent directly to the system. However, the final score remains the next time the course is started.

Exporting SCORM courses

1. Select **System > Hierarchy level > Import / Export > SCORM Export**.
2. Select the language in which to export the course from the **Please select the language you would like to export the course in** list. The player is displayed in the selected language and the course content remains the same.
3. Select the SCORM version in which the course will be exported from the **Please select the SCORM version in which you want to create the course** list.
4. Select the course or click **Select All**.
5. Click **Create**. A .zip file is created for each selected course. A green check mark and a confirmation message are displayed.
6. Click the exported course link and save the file.

Exporting user scores

Use Export User Scores to export test results to an XML file or post them to a URL location. You can export test results for individual courses, or for all courses. If you have chosen to export the scores to an IMS XML file, the path to the file and the option to download it are displayed. If you have chosen to post the scores to a URL, you are prompted to specify a valid URL.

To export user scores:

1. Select **System > System hierarchy level > Import / Export > Export User Scores**.
2. Select an individual course or all courses from the **Test Scores To Export** item list.
3. Select the format in which to export test scores from the **Export Data To** item list.
4. Specify a range of dates for test scores to export or select the **All Dates** check box to export scores for all dates.
5. Click **Export Test Scores**.

Setting up an external site SSO without encrypted data elements

Use External Site SSO, single sign on, to allow a user to access systems outside of Infor Learning Management that would normally require a separate login. After a user clicks an External Site SSO link, they are automatically authenticated by the external system using the login credentials that are embedded within the SSO link and given access to the external course, document repository, application, or other secured item without having to supply login details. You can edit or delete an SSO link that has already been created.

Data included in an SSO link is not encrypted by default. This topic has instructions for creating SSO links without encrypted data elements. You can set up your SSO link so that users login with encrypted credentials. To do this, the Send MD5 option must be enabled. See Setting up an external site SSO with encrypted data elements on page 352 for instructions on creating SSO links with encrypted data elements and enabling the Send MD5 option.

To set up an external site SSO:

1. Select **System > System hierarchy level > Import / Export >** External Site SSO.
2. Click Add New External SSO.
3. Specify this information:

   External SSO Name
   Specify a name for the SSO link.

   External URL
   Specify the full address of the external system.

4. Select how data should be sent to the external URL by selecting either **Post** or **Get** in the **Method** item list.
5. Select the data elements to be passed in the SSO link:
   a. Select the **Include in SSO** check box.
   b. Specify the Variable Name for the selected items in the field.
6. Click **Add**.

Setting up an external site SSO with encrypted data elements

Use External Site SSO, single sign on, to allow a user to access systems outside of Infor Learning Management that would normally require a separate login. After a user clicks an External Site SSO link, they are automatically authenticated by the external system using the login credentials that are embedded within the SSO link and given access to the external course, document repository, application, or other secured item without having to supply login details. You can edit or delete an SSO link that has already been created.

Use these instructions to set up your SSO link so that users login with encrypted credentials and enable the Send MD5 option. Data included in an SSO link is not encrypted by default. See Setting up an external site SSO without encrypted data elements on page 351 for instructions on creating SSO links without encrypted data elements.

To set up an external site SSO with encrypted data elements:

1. Select **System > System hierarchy level > Import / Export >** External Site SSO.
2. Click Add New External SSO.
3. Specify this information:

   External SSO Name
   Specify a name for the SSO link.

External URL
Specify the full address of the external system.

4 Specify this information:
5 Select how data should be sent to the external URL by selecting either **Post** or **Get** in the **Method** item list.
6 Select the data elements to be passed in the SSO link:
   a Select the **Include in SSO** check box for the data element.
   b Select the **Include in MD5** check box for the data element.
   c Specify the Variable Name for the selected items in the field.
7 Enable MD5 on the SSO link:
   a Select the **Yes** radio button in the Send MD5 row.
   b Specify the name of the variable that will contain the MD5 hash code in the Variable Name field.
   c To use a secret key with the MD5 encryption:
      1 Select the **Yes** radio button in the Use Secret Key row.
      2 Specify the value of the secret key in the Secret Key field.
   d To specify a data element separator type, select a separator from the **Element Separator** item list.
   e Select the **Hexadecimal** or **String** radio button to indicate how the MD5 will be sent in the Send MD5 As row.
   f To set the order in which the selected MD5 elements will be sent, change the sequence number in each field listed in the MD5 Element Order section.
8 Click **Add**.

Viewing and editing an existing SSO link

You can view and edit an SSO link that has already been created.

To view and edit and existing SSO link:

1 Select **System > System hierarchy level > Import / Export >** External Site SSO.
2 Click the name of the SSO link. The **Edit** window is displayed.
3 Update the information. See Setting up an external site SSO with encrypted data elements on page 352 for more information.
4 Click **Update**.

Deleting an SSO link

You can delete any SSO links that are no longer needed.

To delete an SSO link:

1. Select **System > System hierarchy level > Import / Export >** External Site SSO.
2. Click **Delete**. A confirmation message is displayed.
3. Click **OK**.

Importing a hierarchy and custom field data into ILM

Use Hierarchy Import Utility to import a Hierarchy into Infor Learning Management Administrator. An .XLS file template is the a guide for importing the desired Hierarchy.

The .XLS file used as your import template must contain at least a Parent Level Name column and a Level Name column to successfully import a Hierarchy.

A sample Hierarchy template, upon which you can base yuour import template, can be downloaded from this page.

To import a hierarchy into ILM:

1. Select **System > Hierarchy level > Import / Export >** Hierarchy Import Utility.
2. To download a sample template, click Download Hierarchy Template.
3. To import a hierarchy template:
   a. Click **Browse** to locate a template document to upload.
   b. Click **Import**.
4. To import custom field data:
   a. Click **Browse** to locate a custom field data file to upload.
   b. Click **Import**.

Specifying settings for the user synchronization utility

Use **Settings for User Synchronization Utility** to modify the format of import/export logs and adjust various import/export options. You can add, delete, and update large numbers of users from a file into Infor Learning Management.

After using **Import Users from File** or **Remove Users from File**, an XML log of the process is created. This may be reformatted with an .XLS file in order to display the log in a more accessible format.

To specify settings for the user synchronization utility:

1 Select **System > System hierarchy level > Import / Export >** User Synchronization Utility **> Settings for User Synchronization Utility**.
2 To modify the format of the import users log:
   a Click View current to view the current XML format. The format is displayed.
   b Click **Browse** to locate the XLS file you wish to upload.
   c Click **Upload** to complete the process.
3 To revert to the default XLS file click **Restore Default XLS**.
4 To modify the format of the delete users log:
   a Click View current to view the current XML format. The format is displayed.
   b Click **Browse** to locate the XLS file you wish to upload.
   c Click **Upload** to complete the process.
5 To revert to the default XLS file click **Restore Default XLS**.
6 To have users be placed on a level specified by their unique level ID and removed from all other levels, select the **Remove users from all levels but the level specified** check box.
7 To allow users to be added to multiple levels, select the **Allow users to be added to multiple level 2s** check box. To place the user into another level, you must perform an additional import process with an updated unique level ID that specifies the new level where the user should also reside. The **Remove users from all levels but the level specified** check box must be cleared.
8 To specify a default password for users being imported into Infor Learning Management:
   a Select the **Allow default passwords** check box.
   b Specify a value for the password in the field.
9 To specify the date format that must be used in import/deletion spreadsheets:

   Date Format
   Specify the desired format and click **Update**.

10 To verify that your date format works properly:

   Test
   Specify a date in your date format and click **Test**. If there is anything wrong with the test date, an error message is displayed. The Standard Date Time Format Strings and Custom Date Time Format Strings contain information about date formatting best practices.

Importing users from a file

Use **Import Users From File** to import a group of users into Infor Learning Management. This allows you to insert a large number of new users and update existing users with ease. You can select a Microsoft Excel spreadsheet or a CSV file containing a list of users to import. XML log reports are automatically created, after you perform the Import Users From File process. You can view these logs in XML or other formats using the XSL sheet. Previous and current import information is displayed on this page.

You will first need to upload the file that contains all of the users you want to import. This file must be an .XLS or .CSV file. To successfully import users from an .XLS or .CSV file, you will need to have a properly formatted spreadsheet.

After the file has been uploaded, you will need to do the field mappings. This involves setting the criteria for the import into Infor Learning Management, and specifying which spreadsheet columns match each Infor Learning Management field.

IMS Unique Level ID dictates where in the Hierarchy the user will reside. If unspecified, this field will be ignored and the user will be imported into the System level.

To import users from a file:

1. Select **System > System hierarchy level > Import / Export >** User Synchronization Utility **> Import Users from File**.
2. To upload the file:
   a. Click **Browse** to locate the XLS or CSV file.
   b. Click **Upload**. The **Field mapping** page is displayed
3. To map the fields:
   a. For each field, select the corresponding spreadsheet column from the **Xls Fields** item list. For example, if the you want to populate the ILM Field Login Name with the field Login from the file, you would select the XLS field **Login** from the item list.
   b. To automatically reject records in cases where the selected field matches any previous records, select the **Distinct** check box. Do not select this box if you want to update users.
   c. Click the **Unique ID** radio button corresponding to the field you want to use as the key factor for determining whether a user is inserted or updated in Infor Learning Management. If a user with the selected unique identifier already exists in the system, the utility will update the user fields for that user in Infor Learning Management with the fields from the file. The utility will not overwrite information with blank fields.
   d. Select the **Required** check box for fields that are required for a new record to be created in Infor Learning Management. Fields marked with an asterisk are mandatory fields. If any of these fields are missing, you cannot create new users from the file. These fields include Login Name, Password, First Name, Last Name, and Email.
   e. Click **Submit** to import the file.
   f. To view a log of all successfully imported users, click the XML file link under Delete Log(s). You can also click Transform to view the log as a table.
4. To delete logs:
   a. Select the check box for the log.
   b. Click **Delete**. A confirmation dialog box is displayed.
   c. Click **OK**.

Removing users from a file

Use **Remove Users from File** to remove users from the system by uploading a XLS or CSV file that contains a list of users to be removed. After a user is deleted this way, all of the records of the user will be deleted including sessions, scores, and history. Log reports in XML form are automatically created after you complete the Delete Users From File process, and can be found in the same window. These log reports contain the users' transcript, along with previous and current deletion information. You can view these logs in XML in HTML format.

You will first need to upload the file listing all the users you want to remove. The file must be an .XLS or .CSV file. If the IMS Unique Level ID is included in the file, the user will only be deleted from that specific level. To delete a user from the entire system, do not include an IMS Unique Level ID in the file. The file used to delete users can only contain two columns.

After the file has been uploaded, you will need to do the field mappings. This involves setting the criteria for removal from the system, and specifying the spreadsheet columns that match the Infor Learning Management fields. The spreadsheet columns are displayed on the left, and you will have to select the Infor Learning Management fields to which those columns correspond.

To remove users from a file:

1. Select **System > System hierarchy level > Import / Export >** User Synchronization Utility **> Remove Users from File**.
2. To upload the file:
   a. Click **Browse** to locate the XLS or CSV file.
   b. Click **Upload**.
3. To map the fields:
   a. Select the Infor Learning Management fields to which the XLS columns correspond from the **ILM Field** item lists.
   b. Click **Submit**.
4. To view a log of the deletion, click the XML file link. To view it as a table, click transform.

Importing course data

Use **Attendance Data Import** to import course data, such as event credit and external test data, as well as users, courses, and events that do not already exist in Infor Learning Management.

To import course data:

1. Select **System > Hierarchy level > Import / Export >** Attendance Data Import **> Attendance Data Import**.
2. Select how the data is imported:
   a. **Multiple**—updates the course/event/test data from an Excel spreadsheet (.xls)
   b. **Single**—updates the course/event/test data with data from Infor Learning Management. To manually choose a course in which to import data, click its corresponding radio button.
3. Click **Excel File Upload**.
4. Click **Browse** to locate the .xls file you wish to upload from your computer.
5. Click **Mappings**.
6. Specify a value in the **Start processing data at Row** field.

7 Specify actions to process:

Create user that does not already exist in the system

Add existing user to the mapped level

Add course that does not already exist

Add event that does not already exist

Add test that does not already exist

Add course and event to every level where user exists
Select **Yes**, **No**, or **Add course event only below the currently selected level**.
Note: Add a Level IMS Unique ID to the import file or the import template to make sure the new data is created on the desired level. If no Level IMS Unique ID is mapped, all actions are performed on the System Level, except when either “Yes” or “Add course and event only below selected level” is selected.

8 Select **<New>** or choose an existing template from the **Load** item list.

Note: If an event template with classroom portion is used, and the Event Start date and Event End date are mapped, new one-hour sessions are created for each day between the start and end dates with the start time of 12:00 PM UTC.

9 To overwrite an existing template click **Save**.

10 To delete an existing template click **Delete**.

11 To add your current mapping as a new template, specify a new name and click **Save as**.

12 Select up to three unique identifier settings from the **Step 1**, **Step 2**, and **Step 3** item lists. These item lists determine options for how individual users are by identified from the columns in your spreadsheet. To choose not to use an identifier, select **None**

13 Select an Event Template, if used..

14 To map a field:

a Select the source column from the spreadsheet in the **Data source in spreadsheet Column** item list.

b Select **Column**, **Constant**, **LEFT**, **RIGHT** or **SUBSTR** from the **Function** item list. For Function choices other than **Column**, specify a value in the fields corresponding to your choice.

c Click the radio button for the desired field.

d Click **Add to Mapping**.

e Repeat above steps until all desired fields are mapped. The fields required for mapping are: **User Unique ID**,**Login Name**, **Unique course ID**, **Course Name**, **Event ID** or **Event Name**, and **Score Type**.

15 To undo the last field you mapped click **Remove Last Function**.

16 To undo a mapping click **Clear Mapping**.

17 Click **Process**. Make sure that the number of imported entries matches the Excel data, any failed entries are viewed on the next screen.

18 Click **Continue**. View the import details and correct any resulting errors from the error report.

Creating a template to import attendance data

Use **Attendance Data Import (Template Creation)** to create templates for importing attendance data. The administrators are able to import spreadsheets for classroom-based courses making the process more consistent and less prone to error. You can create a new template (from scratch or based on an existing template) or modify an existing template.

The .xls file you upload serves as a base for mapping the columns in a spreadsheet to fields in ILM when importing the information. A single .xls file can be used to create multiple templates as long as all the mandatory fields are mapped.

To create an Attendance Data Import template:

1. Select **System > Hierarchy level > Import / Export >** Attendance Data Import **> Attendance Data Import (Template Creation)**.
2. Click **Mappings**.
3. Select **<New>** or choose an existing template from the **Load** item list.
4. Select up to three unique identifier settings from the **Step 1**, **Step 2**, and **Step 3** item lists. These item lists provide options for how individual users will by identified from the columns in your spreadsheet. To choose not to use an identifier select **None** from the appropriate item list.
5. To map a field:
   a. Review available and required template fields (field properties, such as field length and type, are provided in the User Import Utility (HRIS) :

      Available fields:

      - Login Name
      - User unique ID
      - Password
      - Last Name
      - First Name
      - Email
      - Nickname
      - IMS Unique Level ID
      - Unique Course ID
      - Course Short Name
      - Course Name
      - Course description
      - Course objectives
      - Course audience
      - Course Credit
      - Event ID
      - Event Name
      - Event Start
      - Event End
      - Event notes
      - External test name
      - Score Type

There are two score types available:

- EXT_POST_SCORE—creates a score-based event and may have minimum passing requirements
- EVENT_CREDIT—creates a credit-based event where a user is awarded a credit upon completion

- Passing Grade
- Score
- Date Scored
- Citizenship
- Country of Origin
- Country of Birth
- DOB (Date of Birth)
- Emergency Contact
- Gender
- Hobby (Training needs US)
- Marital Status
- SSN
- Spouse Name
- Address
- Street Address
- City
- Country
- County1
- State
- Zip
- Emergency Phone
- Extension
- Fax
- Home phone
- Phone
- Date graduated
- Education level
- School graduated
- Company
- Date hired
- Department
- Employee ID
- Salary
- Deduction
- Supervisor ID
- Title
- Change Password at Next Login
- Custom 1
- Custom 2

- Custom 3
- Custom 4
- Custom 5
- Custom 6
- Email From Address
- Email From Name
- Interface Language
- Regional Local Preference
- User Active

Table 6: Required fields

Import	Required Field Mappings
Course(s) only	Unique course ID OR Course Name AND Course Short Name Event ID or Event Name
Event(s) only to an existing course	Course Name OR Unique course ID Event Name
Course(s) and Event(s)	Unique course ID OR Course Name AND Course Short Name Event Name
User(s) only to an existing course Users are imported to the current level as well as the parent level of that course.	Course Name OR Unique Course ID Event ID or Event Name First Name Last Name User login Password Email
Course(s), Event(s), and User(s) Users are imported to the current level as well as the parent level of that course.	Unique course ID OR Course Name AND Course Short Name Event ID or Event Name User unique ID Login Name First Name Last Name Password Email

b Select the source column from the spreadsheet in the **Data source in spreadsheet Column** item list.

c Select **Column**, **Constant**, **LEFT**, **RIGHT** or **SUBSTR** from the **Function** item list. For Function choices other than **Column**, specify a value in the fields corresponding to your choice.

d Click the radio button for the desired field.

e Click **Add to Mapping**.

f Repeat above steps until all desired fields are mapped. The fields required for mapping are:

6 To undo the last field you mapped click **Remove Last Function**.

7 To undo a mapping click **Clear Mapping**.

8 To overwrite an existing template click **Save**.

9 To delete an existing template click **Delete**.

10 To add your current mapping as a new template, specify a new name and click **Save as**.

Configuring attendance data import

Use **Attendance Data Import Configuration** to determine how users, courses, and events are imported into Infor Learning Management from an outside source. You can choose whether multiple or single courses will be imported at one time, and decide whether administrators will be able to alter certain elements of imported information.

Note: Maximum enrollment is automatically increased when enrolling users in events so that all imported users are enrolled.

To configure attendance data import:

1. Select **System > Hierarchy level > Import / Export >** Attendance Data Import **> Attendance Data Import Configuration**.
2. To allow course credit to be imported select **Allow course credit import**.
3. To allow scores from external tests to be imported select **Allow external test import**.
4. To allow the administrators to map Infor Learning Management fields to the items in import files, select **Allow mapping during processing**.
5. To allow multiple courses to be imported at once select **Allow multiple course import**.
6. To allow single courses to be imported individually, select **Allow single course import**.
7. To allow future enrollment, select **Allow future enrollment**.
8. To update the course/event/test data with data from a spreadsheet, select the **Multiple** radio button.
9. To update the course/event/test data with data from Infor Learning Management, select the **Single** radio button.
10. Select to if the option is available to administrators and whether the default value is set or if the administrators can specify a value:

    Start Processing Data at Row
    Specify a numerical value to determine which row in a spreadsheet is the first from which the information is processed.

    Create user that does not already exist in the system

    Add existing user to the mapped level

    Add course that does not already exist

    Add event that does not already exist

    Add test that does not already exist

    Add course and event to every level where user exists
    Select **Yes**, **No**, or **Add course event only below the currently selected level**.

11. Click **Apply**.

HRIS Import Utility

HRIS Import Utility interface within the Administrator can be used to manage the ImportUtility.exe.config files and Files.xml files.

ImportUtility.exe.config

1 Select **System > Hierarchy level > Import / Export >** HRIS Import Utility **> ImportUtility.exe.config**

2 Use these options to configure the utility or individual records:

Option	Description
Upload New File	Upload new config file to the ILM OLTP database
Download	Download and save the current config file
Delete	Delete a record from the table. **Note:** You cannot delete an active record.
Active	This checkbox is selected for every active record in the table. You can select another record to be active, however, you cannot deselect the active box on an active record.

Note: All fields are displayed in read-only format.

Course/Event Import Utility

Administrators can use **Course/Event Import Utility** to import courses, events, and all properties of the courses, into the system. You can select the level to which to import the course and map fields in the file to fields in the system. If the course already exists, the utility updates the current course

Importing Courses and Events

1 Select **System > Hierarchy level > Import / Export >** Course/Event Import Utility **> Course/Event Import**.

2 You must use the Course/Event Import template that is provided on the **Upload** tab. If you have not previously downloaded the import template, click Download Course/Event Import Template and enter the date to import using that template. The only field that is required is **IMS Course ID**.

3 Navigate to and select the .xls file that contains the import data and click **Upload**.
4 Once the file is uploaded, click **Next.**
5 If you changed the field names in the template, map the fields in the system to the fields in your template. You can load previously saved configuration settings for field mappings and apply them to the file that is being uploaded by clicking **Load Settings**. To save the current settings after you setup the field mappings, click **Save Current Settings**.
6 Click **Next**.
7 Any validation errors are displayed on the **Validation** tab. Correct the errors, upload the template again, and click **Process**. Process status and update summary is displayed. You can download the output file or **Go to History** to view the list of uploads.

Configuring settings for field mappings

1 Select **System > Hierarchy level > Import / Export >** Course/Event Import Utility **> Configuration**.
2 To edit field mappings, click **Edit** next to the template.
   Note: Settings for field mappings are saved during the Course/Event Import process. The **Configuration** tab is used to make changes to previously saved settings.
3 Select between **Course Fields**, **Event Fields**, and **Level Fields** to edit the mappings for those fields.
4 Click **Update**.

Understanding system utilities

Use System Utilities to perform various maintenance functions, such as removing expired records and logging out users.

Resetting sessions

You can reset session time for al sessions over 24 hours old.

To reset sessions:

1 Select **System > Hierarchy level > Utilities >** System Utilities.
2 Click **Submit** for **Clean up all sessions over 24 hours old**.

Removing expired records

Remove expired records to reset course waitlists with elapsed registration deadlines.

To remove expired records:

1 Select **System > Hierarchy level > Utilities >** System Utilities.
2 Click **Submit** next to **Remove all expired records from waiting list**.

Signing out all users

Use this procedure to sign out all users at once. You will also be signed out of the system.

To sign out all users:

1 Select **System > Hierarchy level > Utilities >** System Utilities.
2 Click **Submit** next to **Logout all users**.

Searching the repository

Use Search Repository to view items in The Repository, which includes images, documents, Adobe Flash, and multimedia files that are used in Infor Learning Management.

To search the repository:

1 Select **System > System Hierarchy level > Utilities >** Search Repository.
2 Use search to locate one or more repository items.
3 Select an item.
4 Click Click here to view this item. The item is displayed.

Understanding repository cleanup

Use Repository Cleanup to remove repository items and style sheets that are not linked to courses in the database. You can view all of these files and permanently remove the files that are no longer necessary from the system.

Caution: Items removed from the system can not be recovered. Proceed with caution.

Cleaning up physical files

Use the **Cleanup physical files** radio button to archive Repository files that are no longer in use. You can view these files to determine the items that you want to retain. The unused files will be backed up into an archive directory on the server as a precaution. The archive can be removed after validating the success of the cleanup.

To clean up physical files:

1. Select **System > System Hierarchy level > Utilities >** Repository Cleanup.
2. Select the **Cleanup physical files** radio button.
3. Click **Submit**. A list of physical files in the repository is displayed.
4. Click a file to view it.
5. Select the check boxes for the files.
6. Click **Remove**.

Cleaning up unlinked items

Use the **Cleanup Unlinked Items** radio button to remove repository file records in the database for unused files and to physically remove those files from the repository directory on the hard drive. You can view these files to determine the files that you want to retain.

To clean up unlinked items:

1. Select **System > System Hierarchy level > Utilities >** Repository Cleanup.
2. Select the **Cleanup unlinked items** radio button.
3. Click **Submit**. A list of unlinked repository items is displayed.
4. Click an item to view it.
5. Select the check boxes for the files.
6. Click **Remove**.

Cleaning up learning objects

Use the **Cleanup Learning Objects** radio button to remove unused learning objects from the database. You can click the learning object links to access information about those learning objects. The learning objects marked in red are not associated with any courses. These are the only learning objects that you will be able to remove.

To clean up learning objects:

1. Select **System > System Hierarchy level > Utilities >** Repository Cleanup.
2. Select the **Cleanup Learning Objects** radio button.
3. Click **Submit**. A list of available learning objects is displayed.
4. Click an item to view it.
5. Select the check boxes for the files.
6. Click **Remove**.

Cleaning up style sheets

Select the **Cleanup Style Sheets** radio button to remove unused style sheets from the database. You can only remove style sheets that are not associated with any courses.

To clean up style sheets:

1. Select **System > System Hierarchy level > Utilities >** Repository Cleanup.
2. Select the **Cleanup Style Sheets** radio button.
3. Click **Submit**. A list of available style sheets is displayed next to the courses that use them.
4. Select the check boxes for the files.
5. Click **Remove**.

Clearing level user history

Use Clear Level User History to remove a user's curricula, course, or event enrollment when the user is moved from one level to another. When an administrator moves a user from one level to another, the user's course, curriculum, and event enrollment associated with the original level is retained in the system. The user can continue to access those curricula, courses and events even though they do not exist in the user's new level. An administrator can use Clean Level User History to terminate enrollment in curricula, courses, or events that do not exist in the user's new level, after which the user will no longer be able to access them.

The user's transcript, session and score data are not deleted. You will be able to report on the user's activity at Level 1. The user will continue to see this information on their transcript.

To clear level user history:

1. Select **System > System Hierarchy level > Utilities >** Clear Level User History.
2. Use the search functions to locate the users. Click the search icon to view all users.
3. To enable cleaning users' curriculum history, select the **Clean level user curriculum history** check box.
4. To enable cleaning users' course history select the **Clean level user course history** check box.
5. To enable cleaning users' event history, select the **Clean level user event history** check box.
6. Select the check boxes for the users.
7. Click **Clean History**.

Adding, editing, and removing grades

Use Grades to create a set of grades for use in your courses and curricula.

After you add a grade level to the set, all existing score ranges will adjust to accommodate the new average for that number of ranges. If you want score ranges other than the default ranges you will have to manually adjust these values. You can associate the grade with an assignment template on page 122. Then, the grading system is automatically associated to a 'Post Assessment' external test on page 126. All events related to the course and assignment will be created with an external test 'post assessment' based on the grading system defined. The default passing score is set to 70%. To change the passing score, see Editing external tests on page 126.

After you remove a grade level from the set, all remaining score ranges will adjust to accommodate the new average for that number of ranges. If you want score ranges other than the default ranges you will have to manually adjust these values.

To add, edit, and remove grades:

1. Select **System > System Hierarchy level > Utilities >** Grades.
2. To create a new set of grades, click **Add new grade**.
3. To remove a set of grades, click the Delete icon.
4. To edit an existing set of grades, use the Search options to find and select the grade set.
5. To add an additional grade level to a set of grades, click Add grade.
6. To remove a grade level from a set of grades, click the Delete icon.
7. To remove all but two ranks from the set of grades, click Clear All. A set with a 0 to 50 range and a 51 to 100 range is displayed.
8. To change the grade icon so that a custom icon is displayed instead of the standard star icon, specify this information.

   Grade icon URL
   Specify the URL for the icon image file. Grade icons must be 16 x 16 pixels in size.

9. Specify a description or other text for the grade set.
10. To change the maximum grade for any level, specify the number for that level in the Value field.
11. Specify a description for any level in the field.
12. Click **Save**.

Making all events in a level default

Use Default All Events to make all events in the currently selected level default if the event has an Infor Learning Management portion, an online portion, or both portions active and the classroom portion is not active. This option is not available at the system level.

To make all events default for a level:

1. Select **System > Hierarchy level 2 or below > Utilities >** Default All Events.
2. Click **Submit**. A confirmation message is displayed.
3. Click **OK**.

Creating a new portal

Use Create New Portal to set up as many portals as you want for your Infor Learning Management site. This gives you the freedom of creating different portals specific to particular audiences. For each portal you create, you can choose to allow new users to register for levels 3 - 12 if applicable, utilize the e-Commerce functionality, and enable support for right-to-left languages.

Portal names may not contain spaces or special characters. These portal names cannot be used:

- Adapters
- admin
- App_Browsers
- App_GlobalResources
- App_Themes
- bin
- ClientBin
- Common
- Controls
- Examples
- ExceptionManagement
- HelpersInterfaces
- ITTWebServices
- learner
- mlearner
- obj
- OnlineEditor
- Portal
- Properties
- RadControls
- repository
- repositorydev
- Schema
- scormplayerScripts
- Service References
- SharePoint
- SharepointMaster
- standards
- tlearner
- VLSChat
- wa
- WCFServices
- Web References
- _custom
- _includes
- _js
- _newuser

To create a new portal:

1 Select **System > System hierarchy level > Portals >** Create New Portal.
2 Specify the name of the portal.
3 Specify this information:

On new user registration, allow choice of 'none' for level 3 and beyond
Select this check box to allow new users to register for levels 3 - 12.

New Portal Template
Select either SoHo or SoHo Xi template. SoHo is the legacy portal template.

Enable E-Commerce
Select this check box to enable e-commerce.

Enable support for right-to-left languages
Select this check box to enable support for languages which are read right-to-left.

Apply lowest level logic for registered events
If you select this check box, users in the Infor Learning Management Portal will only be able to view and begin events that are on their same lowest level. This applies to registered events only. This will also apply to portal managers when they are impersonating a user.

Apply lowest level logic for available events
If you select this check box, users in the Infor Learning Management Portal will only be able to view and begin events that are on their same lowest level. This applies to available events only. This will also apply to portal managers when they are impersonating a user.

Enable calculation of Certification Program credits based on completion of each Requirement
Select this check box to enable the calculation of Certification Program credits based on completion of each Requirement.

4 Click **Apply**.

Setting the default portal

Use Set Portal Default to change the default portal at any time. While you can have numerous portals, one of them must be designated as your default portal. The settings of your default portal are the initial settings for your other portals.

To set a portal as default:

1 Select **System > System hierarchy level > Portals >** Set Portal Default.
2 Select the radio button next to the name of your default portal.
3 Click **Update**.

Deleting a portal

Use Delete Portal to permanently remove any of the portals. Be careful when deleting portals because this action cannot be reversed. You will notice that your default portal is unavailable. This is because it is the only portal that cannot be deleted. If you want to delete that portal, you must first make another portal your default portal. See Setting the default portal on page 370.

To delete a portal:

1 Select **System > System hierarchy level > Portals >** Delete Portal.
2 Select the check box for the portal.
3 Click **Delete**. A confirmation dialog box is displayed.
4 Click **OK**.

Importing a new portal

Use Import Portal to import portals. For example, you can create and modify a portal on your staging site and then export that portal to your live site. You can also send portals to new sites. This is a two step process. First, you must export the portal from a site and save the portal zip package to your computer. See Exporting a portal on page 372. Second, you must import the portal package to another site. When importing a portal, you can import a new portal on page 371 or overwrite an existing portal on page 371.

To import a portal:

1 Select **System > System hierarchy level > Portals >** Import Portal.
2 Select the **Create New** radio button.
3 Specify this information:

   Portal File
   Specify the file path or click **Browse** to locate the .ZIP package on your computer.

4 Click **Import**.

Overwriting an existing portal

Use Import Portal to import portals. For example, you can create and modify a portal on your staging site and then export that portal to your live site. You can also send portals to new sites. This is a two step process. First, you must export the portal from a site and save the portal zip package to your computer. See Exporting a portal on page 372. Second, you must import the portal package to another site. When importing a portal, you can import a new portal on page 371 or overwrite an existing portal on page 371.

To overwrite and existing portal:

1 Select **System > System hierarchy level > Portals >** Import Portal.
2 Select the **Overwrite Existing** radio button.
3 Select an existing portal from the item list.
4 Specify this information:

   Portal File
   Specify the file path or click **Browse** to locate the .ZIP package on your computer.

5 Click **Import**.

Exporting a portal

Use Export Portal to export a portal. For example, you can create and modify a portal on your staging site and then export that portal to your live set. You can also send portals to new sites. This is a two step process. First, you must export the portal from a site and save the portal zip package to your computer. Second, you must import the portal on page 371 package to another site. You can also use Export Portal, to download or delete portal packages from the site. All of the available portals are displayed. The default portal is indicated with a green check mark.

To export a portal:

1 Select **System > System hierarchy level > Portals >** Export Portal.
2 Select the **Export** check box for the portal.
3 Click **Export** to create packages for all selected portals.

Downloading a portal package

Use Export Portal to export a portal. For example, you can create and modify a portal on your staging site and then export that portal to your live set. You can also send portals to new sites. This is a two step process. First, you must export the portal from a site and save the portal zip package to your computer. Second, you must import the portal on page 371 package to another site. You can also use Export Portal, to download or delete portal packages from the site. All of the available portals are displayed. The default portal is indicated with a green check mark.

To download a portal package:

1 Select **System > System hierarchy level > Portals >** Export Portal.
2 Export the portal. See Exporting a portal on page 372.
3 Click Download. A confirmation message is displayed.
4 Click **Save**.

Deleting a portal package

Use Export Portal to export a portal. For example, you can create and modify a portal on your staging site and then export that portal to your live set. You can also send portals to new sites. This is a two step process. First, you must export the portal from a site and save the portal zip package to your computer. Second, you must import the portal on page 371 package to another site. You can also use Export Portal, to download or delete portal packages from the site. All of the available portals are displayed. The default portal is indicated with a green check mark.

To delete a portal package:

1. Select **System > System hierarchy level > Portals >** Export Portal.
2. Click **X**.
3. If the **X** is not displayed, export the portal, then retry. See Exporting a portal on page 372.

Modifying portal HTML

Use Modify Portal HTML to edit the HTML code for a portal. You can edit the different sections or parts of a portal that are displayed in the general portal layout, upon signing in or out, or for other options or events that occur in the portal. Copying the HTML code and editing in another program will allow you to leave the current Portal HTML in place while you make the desired updates. You can customize your portal to give it the same look and feel as your organization's website. This entails modifying text, replacing images, creating links, adding tokens, and more. You should design your portal with an HTML editor, and then copy and paste the HTML code into the content body in Infor Learning Management Administrator.

Some text displayed cannot be edited in HTML mode because they are blocks of text stored in Language Keys. If you want to edit these predetermined text blocks, you must enter the exact text into the portal content search. Please refer to Searching portal content on page 379 for more information.

To access the files you are storing in the portal's repository, use the ##REPOSITORY_FOLDER## token to access the custom repository. For example, if you uploaded a file called custom_pic.jpg, use your custom files in HTML as in the following example: <img
src=##REPOSITORY_FOLDER##custom_pic.jpg>

THIS OPTION SHOULD ONLY BE USED BY USERS WHO KNOW HTML.

These tabs at the top of the Modify HTML screen represent the portal pages that may be edited:

- **Login Screen** - You can configure your company logo, a language selection item list, user name and password fields, a forgot password button, and a new users register here button.
- **Forgot Password** - You can configure the company logo, login name field, and e-mail field.
- **Portal Layout** - Design the general layout and appearance of your portal. You can customize the screen that users see when they first log into the system. The portal layout consists of the various frames used in the general design of the portal. Use this tab to modify settings such as the width of the frame at the top of the screen where your company logo is located, add and delete frames, and change the overall design of your portal.

- **Force PW Change** - For the force password change screen, you can configure the company logo, enter new password field, and confirm new password field.
- **Portal Header** - You can design the portal header located at the top of the portal screen. For the portal header you can configure the company logo, and simple graphics.
- **Manager Approval**- You can design the manager approval interface screen.
- **Portal Selector** - You can design the portal selector page. If your organization has more than one portal, this page is displayed for users to select the appropriate portal.
- **Course Approval Request** - You can design the course approval request screen.
- **New User** - You can configure the company logo, login name field, password field, confirm password field, first name field, last name field, e-mail field, local preference, and regional locale preference.
- **Logout** - You can design the user logout screen.

To modify portal HTML:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Modify Portal HTML.
2. Click the tab for the portal option or area you wish to edit.
3. To copy the HTML code, click **Copy to Clipboard**.
4. Edit the HTML code.
5. To revert all the HTML changes made to the portal since its creation to its original state, click **Restore Default**.
6. Click **Update**.

Making style changes across all portal pages

Use Manage Styles to make color and style changes across all of the portal pages, instead of having to modify each page individually. Use CSS files, which are a simple mechanism for adding style, such as fonts, colors, and spacing, to web documents. To use this page, download the CSS file that is stored on the Infor Learning Management server and save it to your hard drive, modify it with an HTML editor, and then upload it back to the server.

You can download an example CSS file that is stored on the Infor Learning Management server You can modify this CSS file as desired and upload it.

To make style changes across all portal pages:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Manage Styles.
2. Create a CSS file and upload it.
   a. To download an example CSS file that is stored on the Infor Learning Management server, click Download CSS File.
   b. Modify this CSS file.
   c. Save the file.
3. Click **Browse** to locate the CSS file.
4. Click **Upload**.

Uploading portal repository files

Use Manage Portal Repository to upload your own files including graphics, HTML pages, and other documents or files so you can customize the portal to be consistent with the look and feel of your company's website or corporate intranet. If you have several files that you want to import into the repository, you can upload them as a .ZIP file. The .ZIP will automatically be unzipped and stored as if you uploaded them individually. The files will be unpacked and placed into a new sub-directory under the portal. Files that are uploaded individually are uploaded to the portal's root directory.

The portal's repository is different from the repository created in Infor Learning Management Content Creator. A file must be uploaded into the portal's repository for it to be accessible for that portal. These files are displayed in the repository so you can use them in other places, such as the login screen, new user screen, and portal header. You can reference one of these files in your repository in the Modifying portal HTML on page 373 pages, by inserting the token that represents the file.

To access the files you are storing in the portal's repository, use the ##REPOSITORY_FOLDER## token to access custom repository. For example, if you uploaded a file called custom_pic.jpg, use your custom files in HTML like this example: <img src=#REPOSITORY_FOLDER#custom_pic.jpg>

To upload portal repository files:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Manage Portal Repository.
2 Specify the path of the .ZIP or individual file you want to upload or click **Browse** to find it on your computer.
3 Click **Upload**.

Understanding the configure portal structure page

Use Configure Portal Structure to customize the layout of your portals. The portal is broken into top categories, categories, and options. Top categories are the main classes found at the top of the portal. Categories are the main sections of the top categories, which are found on the left side of the portal screen. Options are the tools that users can use within the portal.

For example, Courses is a top category, My List is a category, and My Home, My Courses, My Curricula, My Calendar, and Available List are options.

Administrators can show and hide various categories and options, add and delete categories and options, move options into different categories, and even add links to external websites by arranging the portal structure.

Adding categories and options to your portal

Use **Add New Top Category**, **Add New Category**, and **Add New Option** to create your own categories and options . You can also create links to external web sites.

You can use Target Link options to specify how the new content will be displayed. If you select the **Content Zone** radio button, then the new area is displayed in the center of the portal screen. If you select the **New Window** radio button, then the new area is displayed in a new browser window. If you select the **Top** radio button, then the new area is displayed in the top portion of the portal screen. If you select the **Full frame** radio button, the new area is displayed in the current window.

To add categories and options to your portal:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Portal Structure.
2 Right-click a top category or category. A menu is displayed.
3 Select **Add New Top Category**, **Add New Category**, or **Add New Option**. Options are displayed.
4 To localize text within the category, select the **Localize Category/Option text** check box.
5 If adding a new top category, specify its name in the Top Category Name field.
6 If adding a new category, specify its name in the Category Name field.
7 If adding a new option, specify the name of the new option in the Option Name field.
8 Click the **Content Zone**, **New Window**, **Top**, or **Full frame** radio button to select the Target Link.
9 Specify the URL or path of the new category or option in the URL/Path field.
10 Click **Add Link** to save the new Top Category/Category/Option, or click **Cancel** to undo your changes.
11 Click **Save Configuration**.

Editing categories and options in your portal

Use the **Edit** menu option to edit existing categories and options.

You can use Target Link options to specify how the new content will be displayed. If you select the **Content Zone** radio button, then the new area is displayed in the center of the portal screen. If you select the **New Window** radio button, then the new area is displayed in a new browser window. If you select the **Top** radio button, then the new area is displayed in the top portion of the portal screen. If you select the **Full frame** radio button, the new area is displayed in the current window.

To edit categories and options in your portal:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Portal Structure.
2 Right-click a top category or category. A menu is displayed.
3 Select **Edit**.
4 To localize text within the category, select the **Localize Category/Option Text** check box.
5 To change the name of a top category, specify its name in the Top Category Name field.
6 To change the name of a category, specify its name in the Category Name field.
7 To change the name of an option, specify its name in the Option Name field.
8 Click the **Content Zone**, **New Window**, **Top**, or **Full frame** radio button to select the Target Link.
9 To change the location of a category or option, specify the URL or path of the category or option in the URL/Path field.

10 Click **Save** to save your changes or click **Cancel** to undo them.

11 Click **Save Configuration**.

Enabling and disabling categories and options

Use Configure Portal Structure to enable and disable different top categories, categories, and options. Enabled items are displayed in the portal and disabled items are not displayed. If you enable or disable an item, all items within it will also be enabled or disabled.

To enable and disable categories and options:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Portal Structure.
2. Select the check boxes for the Top Categories, Categories, or Options that you want displayed in the portal. Uncheck the check box to disable it again.
3. Clear the check boxes for the Top Categories, Categories, or Options that you do **not** want displayed in the portal.
4. Click **Save Configuration**.

Deleting categories and options

Use Configure Portal Structure to permanently remove items from the portal structure. You can only delete items that you or another administrator has created. Default items within the portal structure cannot be deleted and may only be disabled. See Enabling and disabling categories and options on page 377 if there are default items that you do not want displayed.

To permanently remove items from the portal structure:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Portal Structure.
2. Right-click a top category, category, or option. A menu is displayed.
3. Select **Delete Category** or **Delete Option**.
4. Click **Save Configuration**. To undo, click **Cancel**.

Moving portal options

Use Configure Portal Structure to drag and drop categories and options within the portal to rearrange the portal's structure. Determine the logical organization of your portal. Categories may be moved into other categories and options may be rearranged within a category.

To move portal options:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Portal Structure.
2 Click and drag a category or option to move it o another location.
3 Click **Save Configuration**.

Setting a portal or category as default

Use Configure Portal Structure to designate a top category or option as your portal default. The portal default is the top category or option that is displayed when the portal is launched. The default setting for this is My Courses. Category defaults may be set to designate the option that will be displayed by default when that category is selected.

- A red arrow indicates the portal default.
- A black arrow indicates the category default.
- A double black arrow indicates an option is set as default for both the Portal and the category.

After an option is set as a portal default, its top category is automatically set as the portal default and is also marked with a red arrow.

To designate a top category or option as default:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Portal Structure.
2 Right-click a top category, category, or option. A menu is displayed.
3 Select **Set Portal Default** or **Set Category Default**.
4 Click **Save Configuration**.

Removing portal or category default

Use Configure Portal Structure to remove an item's portal default status. The portal default is the category or option that is displayed when the portal is launched. The default setting for this is My Courses.

- A red arrow indicates the portal default.
- A black arrow indicates the category default.
- A double black arrow indicates an option is set as default for both the Portal and the category.

After an option is set as a portal default, its top category is automatically set as the portal default and is also marked with a red arrow.

To

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Portal Structure.
2 Right-click the currently set portal or category default. A menu is displayed.
3 Select **Remove Portal Default** or **Remove Category Default**.

4 Click **Save Configuration**.

Searching portal content

Use Search Portal Content to locate a specific portion of text in the portal and then modify the language of that block of text. When you perform this search, you are actually searching for a particular key that contains the value of that which you have specified. A key is a place holder for pre-determined text that is stored in the database. You can think of it as a unique code that identifies a particular portion of text for all languages. The value is the actual instance of the key or the definition of the key in a particular language.

All of the default keys are displayed in the **Database Content** tab. All of the modified keys are displayed in the **Portal Content** tab. To modify a key for the first time, you will need to look for it in the **Database Content** tab. Any time you wish to modify it thereafter, you will need to locate it in the **Portal Content** tab.

The search results include all of the keys that contain the specified text. After you select one of these keys, a list of locale identifiers, or LCID, and corresponding values is displayed. These are the values for the key in all available languages. Each can be modified individually so that users in different locales can view portal content in the appropriate language.

Every key in the portal can be translated and is available to edit with Search Portal Content. If a user signs in to the portal and chooses another language, the appropriate language text for that key is displayed on that line of the portal.

To search portal content:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Search Portal Content.
2. Specify the search text.
3. Click **Search**.
4. Click the **Database Content** tab. The keys are displayed.
5. Click Select to edit the key.
6. To modify a specific value for the key, specify the text in the Value field for the Lcid.
7. Click **Save**.
8. To add a new key:
   a. Specify the name for the key.
   b. Specify value for the key.
   c. Click **Add**.

Managing portal levels

Use Manage Portal Levels to associate a particular portal with single or multiple levels. This option is helpful for administrators who only want certain users to be accessing a particular portal. For example, if you make a portal for sales people, you can use Manage Portal Levels to only give the sales people levels access to that portal.

To manage portal levels:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Manage Portal Levels.
2. To view child levels, expand the levels.
3. Select the check box for each level you want to associate with the portal.
4. Click **Update**.

Editing portal options

Use Edit Portal Options to modify properties of an existing portal, such as e-Commerce and right-to-left language support. The same options from Creating a new portal on page 369 are displayed on this page.

To edit portal options:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Edit Portal Options.
2. Specify the name of the portal. See Creating a new portal on page 369 for naming restrictions.
3. Specify this information:

   On new user registration, allow choice of 'none' for level 3 and beyond
   Select this check box to allow new users to register for levels 3 - 12.

   Enable E-Commerce
   Select this check box to enable e-commerce.

   Enable support for right-to-left languages
   Select this check box to enable support for languages which are read right-to-left.

   Apply lowest level logic for registered events
   If you select this check box, users in the Infor Learning Management Portal will only be able to view and begin events that are on their same lowest level. This applies to registered events only. This will also apply to portal managers when they are impersonating a user.

   Apply lowest level logic for available events
   If you select this check box, users in the Infor Learning Management Portal will only be able to view and begin events that are on their same lowest level. This applies to available events only. This will also apply to portal managers when they are impersonating a user.

Enable calculation of Certification Program credits based on completion of each Requirement
This check box is cleared by default. If you select this check box, the number of credits completed within Requirements Groups are displayed in the portal without the need to expand the Certification Program. If you do not select this check box, only the number of requirement groups completed will be displayed, without the specific number of credits for each group, until you expand the Certification Program.

4 Click **Apply**.

Modifying registration and download pages

Use Advanced Settings to modify the registration and download pages within a portal.

To modify registration and download pages:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Advanced Settings.
2. To display the user manager item list, select the **Show User Manager Dropdown** check box.
3. To display an e-mail text field on the portal registration page, select the **Show Email Text Field** check box.
4. To enable the OLV download link, select the **Show OLV download link** check box.
5. Click **Update**.

Managing domains

Use Manage Domains to register your own domain name, and then manage and map the multiple domains to portals. You can direct users that use the new friendly domain names to sign in and only see specific content. Multiple domain names can direct to the same portal.

If you set up friendly domain, or DNS, names like http://newyork.companyx.com and http://newjersey.companyx.com using Manage Domains, you can assign each friendly domain name to a portal that is designed specifically for your users within that group.

Domain, or DNS, names need to be registered by your company's network administrator. Please contact your network administrator to discuss your company's registered domain names. If your company utilizes Infor hosting services please contact Xtreme Support.

To manage domains:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Manage Domains.
2. Specify this information:

http://
Specify the desired URL new domain name.

3 Click **Add Domain**.
4 To remove an existing domain:
   a Select the check box for the domain.
   b Click **Delete**.

Adding user-friendly names to your portals

Use Manage Portal Names to create friendly names for your portals, so users can easily access them. You can create multiple names for portals, and then a directory is created off of the main domain, or DNS, name. You can direct users that use the new friendly portal names to sign on and only see specific content. Multiple portal names can direct to the same portal.

Suppose you have a domain, DNS, name of http://www.certpointsystems.com. Use Manage Portal Names, to set up two friendly names such as "newyork" and "newjersey". This then creates direct URL addresses of http://www.certpoint.com/newyork and http://www.certpointsystems.com/newjersey. You can then assign each friendly name to a portal that is designed specifically for your New York or New Jersey users.

Domain, DNS, names need to be registered by your company’s network administrator. Please contact your network administrator to discuss your company’s registered domain names. If your company utilizes Infor hosting services please contact XTreme Support.

To add user-friendly names to your portals:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Manage Portal Names.
2 Specify the new name for the portal.
3 Click **Add Portal Name**.

Deleting an existing user-friendly portal name

Use Manage Portal Names to delete previously-created friendly names for your portals.

To delete an existing user-friendly portal name

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Manage Portal Names.
2 Select the check box for the portal name.
3 Click **Delete**.

Configuring mobile portal structure

Use Configure Mobile Portal Structure to modify and enable options for your mobile portal.

To configure the mobile portal structure:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Mobile Portal Structure.
2. Select the check boxes for the enabled options.
3. Clear the check boxes for the disabled options.
4. To modify a mobile option:
   a. Select an option from the tree.
   b. Select the **Active** check box to enable the option.
   c. Specify the option name in the Text field.
   d. To enable translation of option text, select the **Localize Category/Option text** check box.
   e. Specify the key that corresponds to the option in the Key field.
   f. Specify the path or URL of the option in the URL/Path field.
   g. Click **Save**.
5. To reconfigure the layout of your portal, click and drag an option to the new position in the option tree.
6. Click **Save Configuration** to save any changes you make to the mobile portal's layout.
7. To remove an option from the mobile portal:
   a. Select the option from the tree.
   b. Click **Remove**.

Modifying mobile portal HTML

Use Modify Mobile Portal HTML to access the HTML of a mobile portal so it may be edited. You can copy sections of the HTML you wish to modify, paste them in an HTML editor, make the changes, and copy the code back to the **Modify Mobile Portal HTML** screen.

THIS OPTION SHOULD ONLY BE USED BY USERS WHO KNOW HTML.

To modify mobile portal HTML:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Modify Mobile Portal HTML.
2. Click the tab of the portal page you want to edit.
3. Specify the code.
4. To revert all the HTML changes made to the portal since its creation to its original state, click **Restore Default**.
5. Click **Update**.

Configuring portal access

Use Configure Portal Access to designate up to five possible combinations of credentials that can be used by users to sign in to your portal. These credentials can be things like user IDs, birth dates, or passwords.

You can select up to five Login Name/Password combinations. These will only be assigned if options are selected from the item lists. If you want to have only three possible combinations, for example, you should not select options from the last two sets of item lists.

To configure portal access:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Portal Access.
2. To allow users to sign in with their user name and password, select the **Allow Access with User's Login Name and Password** check box.
3. Select Login Name/Password combinations from the item lists.
4. Click **Update**.

Configuring the transcript page

Use Configure Transcript Page to configure how users' transcripts are displayed in a selected portal.

1. Select **System > Portals > Manage Portals > Portal name > Configure Transcript Page**.
2. To have users' ILM credits displayed, select the **Show ILM Credits** check box.
3. To change the default display option:
   a. Select the **Default Display Options** check box.
   b. Select from the **Default Display Options** item list.
4. To change the Search options:
   a. Select the **Show Search Options** check box.
   b. Select the check boxes for the options you want to enable.
   c. Clear the check boxes for the options you want to disable.
5. To enable transcript export options:
   a. Select the **Export Options** check box.
   b. Select the check boxes for the file types you want to enable.
   c. Clear the check boxes for the file types you want to disable.
6. To enable export display options:
   a. Select the **Export Display** check box.
   b. Select an option from the item list.
7. Select the **Enable/Disable** check box for the search results columns you want displayed.
8. Clear the **Enable/Disable** check box for the search results columns you do not want displayed.
9. To change a column's position on the transcript page, specify a number in the Order field.

10 To display outside credits, select **Show Outside Credits** and select an order number from the item list.
11 To display certifications, select **Show Certifications** and select an order number from the item list.
12 To display the total credits the user has earned, select **Show Total Credits Earned**.
13 To display the CE credits, select **Display CE Credits**.
14 Click **Update**.

Configuring e-mail domains

Use Configure Email Domains to control which e-mail addresses can be used to self-register for the portal.

If the list on this page is blank then any e-mail address can be used to self-register. After at least one domain has been added, self-registration is restricted to the domains in the list and only e-mail addresses from those domains can be used to self-register for the portal.

To configure e-mail domains:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Email Domains.
2. To add a domain to the list, click **Add New**.
   a. Specify the e-mail domain, or the part following the @ symbol in the addresses you want to allow to register, in the Server URL field.
   b. Click Insert.
3. To remove a domain from the list, click the **Remove** icon.
4. To reload the list of domains, click **Refresh**.

Configuring the register by course page

Use Configure Register by Course Page to control display options for the **Register by Course** page that portal managers can view in the portal.

To configure the register by course page:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Register by Course Page.
2. To enable limiting the amount of users displayed in search results, select the **Display Results per page** check box.
3. To set the default amount of results per page, select from the **Default Results per page** item list.
4. To adjust user info displayed in the user list, select a type of user info, such as FirstName, in each column from the **Value** item list.

5 Configure the **Register Users** page:

   a To edit the displayed steps for registering users under Screen Help, specify text in the Step 1 and Step 2 fields in the Screen Help section.
   b To enable search options on the **Register Users** page, select the **Display Search** check box.
   c If search is enabled, select the default user filtration option from the **Default User Filter** item list.
   d If search is enabled, select the default search method from the **Default Search Method** item list.
   e To filter the users that are displayed on this page, select the **Show Filter for Registered Users** check box and select from the item list.

6 Configure the **Cancel Users** page:

   a To allow users to filter the content by status, select the **Display Status Filter** check box and select from the item list.
   b To edit the displayed steps for cancelling users under Screen Help, specify text in the Step 1 and Step 2 fields in the Screen Help section.
   c To enable search options on the **Cancel Users** page, select the **Display Search** check box.
   d If search is enabled, select the default user filtration option from the **Default User Filter** item list.
   e If search is enabled, select the default search method from the **Default Search Method** item list.

7 Configure the **Switch Users** page:

   a To filter the users that are displayed on this page, select the **Show Filter for Registered Users** check box and select from the item list.

8 Click **Update**.

Configuring search tabs

Use Configure Search Page to control options for the search page in the portal.

To configure search tabs:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Search Page.
2 Select the **Configure Search Tabs** tab.
3 To enable course search, select the **Course Search** check box.
4 To enable curricula search, select the **Curricula Search** check box.

   a To enable filtering by blended curricula, select the **Enable Blended Option** check box.
   b To enable filtering by curricula a user is already enrolled in, select the **Enable My Curricula Option** check box.

5 To enable certificate search, select the **Certificate Search** check box.
6 To enable open access resource search, select the **Open Access Resources Search** check box.

7 To have the menu of Advanced Search options expanded by default, select the **Expand Advanced Search Options** check box.
8 To only show child common fields after their parent common fields are selected, select the **Hide child Common Fields until parent value is selected** check box.

Configuring common fields available for use as search filters

Use Configure Search Page to control options for the search page in the portal.

To configure common fields available for use as search filters:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Search Page.
2. Select the **Configure Common Fields** tab.
3. Select the check boxes for the fields you want displayed.
4. Clear the check boxes for the fields you do not want displayed.

Configuring open access resources search

Use Configure Search Page to control options for the search page in the portal.

To configure open access resources search:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Search Page.
2. Click the **Open Access Resources Search** tab.
3. To disable the display of course names, select the **Hide the Course Name Line** check box.
4. To enable the display of a common field before the name of a resource:
   a. Select the **Common field before Resource name** check box.
   b. Select an option from the item list.
   c. To display an alternate item, such as an icon, related to a common field select the **Configure My Resources page enable Common Field before Resource name use relation** check box.
5. To determine what is displayed after the **Course Info** page is opened with a resource's listing, click the **Show only Enrolled Events**, **Show only Not Enrolled Events**, or **Show both** radio button
6. To determine how resources are displayed on the page:
   a. Select the **First group Resources by** check box and select a field from the item list. Values from the field are displayed in the box.

b Use the buttons to determine in which order the information is displayed.
c To enable custom sorting order, select the **Enable custom sorting order** check box.
d To group resources by a second field, select the **Second group Resources by** check box and repeat these steps.

7 Click **Apply**.

Configuring the tabs displayed on the catalog page

Use Configure Catalogs Page to choose the sections and information that are displayed on the **Catalogs** page in the portal. You can also configure the content that is displayed after the user clicks one of the tabs the **Catalogs** page. You can specify how the displayed catalogs should be grouped together. You can group them by up to two categories.

The **Enroll to Curriculum Schedules** check box is only available when editing settings for the **Registered Catalogs** tab.

You can select a common field that is displayed before the name of the curriculum or resource. For example, if you choose to show the value of the Department common field before the Curriculum or Resource name and the user is in the Sales department and is looking at the Widget 123 Product Overview curricula in the Catalogs section of the Portal, this will be displayed:

Sales - Widget 123 Product Overview

You can also use the parent common field instead of the selected common field.

For example, if Region is the parent common field of the Department common field and the Sales department is in the North America region, this will be displayed in the Catalogs section of the portal:

North America - Widget 123 Product Overview

Caution: It is important that you remember to click **Apply** after you configure one tab, before you configure the next tab. If you forget to click **Apply**, the settings for the first tab will not be saved.

To configure the tabs displayed on the catalog page:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Catalogs Page.
2 Select the check boxes for the tabs that you want displayed.
3 Clear the check boxes for the tabs that you do not want displayed.
4 Click **Apply**.

Configuring the content displayed on the catalog tabs

Use Configure Catalogs Page to choose the sections and information that are displayed on the **Catalogs** page in the portal. You can also configure the content that is displayed after the user clicks one of the tabs the **Catalogs** page. You can specify how the displayed catalogs should be grouped together. You can group them by up to two categories.

The **Enroll to Curriculum Schedules** check box is only available when editing settings for the **Registered Catalogs** tab.

You can select a common field that is displayed before the name of the curriculum or resource. For example, if you choose to show the value of the Department common field before the Curriculum or Resource name and the user is in the Sales department and is looking at the Widget 123 Product Overview curricula in the Catalogs section of the Portal, this will be displayed:

Sales - Widget 123 Product Overview

You can also use the parent common field instead of the selected common field.

For example, if Region is the parent common field of the Department common field and the Sales department is in the North America region, this will be displayed in the Catalogs section of the portal:

North America - Widget 123 Product Overview

Caution: It is important that you remember to click **Apply** after you configure one tab, before you configure the next tab. If you forget to click **Apply**, the settings for the first tab will not be saved.

To configure the content displayed on the catalog tabs:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Catalogs Page.
2. Select the tab from the **Current tab to configure** item list.
3. To have curricula displayed, select the **Curricula** check box.
4. To have curriculum schedules displayed, select the **Display Curriculum Schedules** check box.
5. To enable users to enroll in curriculum schedules, select the **Enroll to Curriculum Schedules** check box.
6. To limit the display of curricula to only those that have been assigned through catalogs, select the **Display only curricula assigned to user under Catalog** check box.
7. To group curricula by their mandatory or elective requirement status, select the **Group Curricula (Mandatory/Elective)** check box.
8. To group courses by their mandatory or elective requirement status, select the **Group Courses (Mandatory/Elective)** check box.
9. To display a common field before the name of a curriculum or resource, select the **Common Field before Curriculum/Resource name** check box and select a common field from the item list.
10. To have the parent common field displayed instead of the child common field, select the **Automatically calculate this field using parent Common Field** check box.
11. To have available resources displayed select the **Open Access Resources** check box.
12. To enable Evaluation, select the **Display Evaluation Link** check box.
13. To enable warning messages, select the **Warning Messages** check box.

14 To only show those catalogs in which the user is already assigned to curricula, select the **Display only catalogs which have curricula assigned to the user** check box.

15 Select the items for which a new event indicator should be displayed from the **Show New Event Indicator** item list.

16 Click **Apply**.

Grouping resources and curricula on the catalog page

Use Configure Catalogs Page to choose the sections and information that are displayed on the **Catalogs** page in the portal. You can also configure the content that is displayed after the user clicks one of the tabs the **Catalogs** page. You can specify how the displayed catalogs should be grouped together. You can group them by up to two categories.

The **Enroll to Curriculum Schedules** check box is only available when editing settings for the **Registered Catalogs** tab.

You can select a common field that is displayed before the name of the curriculum or resource. For example, if you choose to show the value of the Department common field before the Curriculum or Resource name and the user is in the Sales department and is looking at the Widget 123 Product Overview curricula in the Catalogs section of the Portal, this will be displayed:

Sales - Widget 123 Product Overview

You can also use the parent common field instead of the selected common field.

For example, if Region is the parent common field of the Department common field and the Sales department is in the North America region, this will be displayed in the Catalogs section of the portal:

North America - Widget 123 Product Overview

Caution: It is important that you remember to click **Apply** after you configure one tab, before you configure the next tab. If you forget to click **Apply**, the settings for the first tab will not be saved.

To group resources and curricula on the catalog page:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Catalogs Page.

2 Select the **I Group curricula By** check box. The item list is enabled.

3 Select a field from the **I Group curricula By** item list. Values from the field are displayed in the box.

4 To display the value as a header for the curricula group, select the **Show value as header** check box.

5 To enable a custom sorting order:

   a Select the **Enable custom sorting order** check box.

   b Select a sorting category.

   c Use the buttons to reposition the item.

6 To group curricula by an additional category, select the **II Group curricula By** check box and complete the information.
7 To group resources, select the **Group resources by** check box and complete the information.
8 Click **Apply**.

Configuring the Resources page

Use Configure Resources Page to choose what information is displayed on the resources page in the portal.

To configure the resources page:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Resources Page.
2 Select the check boxes for the tabs that you want displayed on the page.
3 Select a value from the item lists to specify the order in which the tabs are displayed.
4 Clear the check boxes for the tabs that you do not want displayed on the page.
5 To hide course names, select the **Hide the Course Name Line** check box.
6 To display a common field before the name of a curriculum, select the **Common Field before Curriculum name** check box and select a common field from the item list.
7 If the common field before curriculum name option is enabled and you want to calculate which common field is displayed based on parent values, select the **Automatically calculate this field using parent Common Field** check box.
8 Click **Apply**.

Grouping resources on the Resources page

You can specify how the displayed curricula should be grouped together. You can group them by up to two categories.

To group resources on the **Resources** page:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Resources Page.
2 Select the **I Group resources By** check box. The item list is enabled.
3 Select a field from the **I Group resources By** item list. Values from the field are displayed in the box.
4 To display the value as a header for the curricula group, select the **Show value as header** check box.
5 To enable a custom sorting order:
   a Select the **Enable custom sorting order** check box.
   b Select a sorting category.

c Use the buttons to reposition the item.

6 To group resources by an additional category, select the **II Group resources By** check box and complete the information.

7 Click **Apply**.

Configuring the courses page

Use Configure Courses Page to choose what information and options are displayed on the courses page in the portal. You can also set which tabs are the default. For example, you can set that the **Registered** or **Available** tabs are displayed by default, after a user accesses the **Courses** page. You can set the number of results that are displayed on each page, the names of the displayed tabs, and the order in which they are displayed.

For each tab, you can specify which search options should be displayed and which ones should be default. Some course display and filter options will be unavailable for some tabs. For example, the **Display courses that have ended** are not available for the **Available** tab because an ended course would never be displayed on this tab.

Lastly, you can select whether or not you want an indicator displayed for new courses and events.

To configure the courses page:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Courses Page.
2. Select a tab from the **Default Tab** item list.
3. Select a value from the **Results per page** item list.
4. Select the **Enabled** check boxes to have the tabs displayed.
5. Clear the **Enabled** check boxes to make the tabs unavailable.
6. Specify this information:

   Tab
   The default name for the tab is displayed. Specify text to change the name.

   Order
   The default order for the tab is displayed. Specify a number to re-order the tab.

7. Select the **Display Search** check box to enable search. The **Show Text Filter** check box is enabled.
8. To enable the text field, select the **Show Text Filter** check box. The **Show Course Filter** check box is enabled.
9. To enable the course filter, select the **Show Course Filter** check box. The **Default Search Method** item list is enabled.
10. Select the **Default Search Method**.
11. To allow the user to choose to search for whole words only, select the **Show Whole Word Search Filter in Portal** check box.

12 To have the **Show Whole Word Search Filter in Portal** check box selected by default, select the **Whole Word Search checked by Default** check box.
13 Select the **Show Filter** check boxes for the Course Display and Filter Options that you want displayed.
14 Select the default option from the **Default** item list for each displayed Course Display and Filter Option.
15 Clear the **Show Filter** check boxes for the Course Display and Filter Options that you do not want displayed.
16 Select an option from the **Show New Event Indicator** item list.
17 Click **Update** to save your changes.

Configuring the calendar page

Use Configure Calendar Page to choose what information in addition to registered courses and personal events will be displayed in users' calendars in the portal.

To configure the calendar page:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Calendar Page.
2 To enable listing courses in the calendar for which users are waitlisted, select the **Show "On Waiting List" message** check box.
3 To enable listing courses in the calendar for which users are waiting manager approval, select the **Show "Awaiting Approval" message** check box.
4 To enable listing courses in the calendar which are available for registration, select the **Show "Available Courses" message** check box.
5 Click **Apply**.

Configuring the Catalog Information page

Use Configure Catalog Information Page to choose what information will be displayed on the **Curriculum Information** page in the portal.

To configure the **Catalog Information** page:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Catalog Information Page.
2 Select the **Enabled** check box for the fields that you want displayed.
3 Specify this information:

Order
Specify the order in which you would like the fields displayed.

4. Clear the **Enabled** check box for the fields that you do not want displayed.
5. Select the **Show Empty Values** check box for the fields that you want displayed even if they are empty.
6. Clear the **Show Empty Values** check box for the fields that you do not want displayed if they are empty.
7. Click **Update**.

Configuring the Curriculum Information page

Use Configure Curriculum Information Page to choose what information is displayed on the **Curriculum Information** page in the portal.

To configure the curriculum information page:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Curriculum Information Page.
2. Select the check boxes for the tabs that you want displayed. The item list is enabled.
3. Select a value from the item lists to specify the order in which the tabs are displayed.
4. Clear the check boxes for the tabs that you do not want displayed.
5. Select the **Enabled** check box for the fields that you want displayed.
6. Specify this information:

   Order
   Specify the order in which you would like the fields displayed.

7. Clear the **Enabled** check box for the fields that you do not want displayed.
8. Select the **Show Empty Values** check box for the fields that you want displayed even if they are empty.
9. Clear the **Show Empty Values** check box for the fields that you do not want displayed if they are empty.
10. Click **Update**.

Configuring the Curriculum Schedule Information page

Use Configure Curriculum Schedule Information Page to choose what information is displayed on the **Curriculum Schedule Information** page in the portal.

To configure the **Curriculum Schedule Information** page:

1. Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Curriculum Schedule Information Page.
2. Select the **Enabled** check box for the fields that you want displayed.

3 Specify this information:

Order
Specify the order in which you would like the fields displayed.

4 Clear the **Enabled** check box for the fields that you do not want displayed.
5 Select the **Show Empty Values** check box for the fields that you want displayed even if they are empty.
6 Clear the **Show Empty Values** check box for the fields that you do not want displayed if they are empty.
7 Click **Update**.

Configuring the Course Information page

Use Configure Course Information Page to customize how **Course Information** pages are displayed in the portal.

1 Select **System > Portals > Manage Portals > Portal name > Configure Course Information Page**.
2 Select **Enabled** for the columns to be displayed:
   - Description
   - Objectives
   - Audience
   - Prerequisites
   - Credits
   - CE Credits
3 Specify column **Order**.
4 Select **Show Empty Values** if empty values need to be displayed.
5 Specify **Events Ordering** by selecting values from **Order by** and **Ascending/Descending**
6 To exclude past events from the page, select **Show only present and future events**.
7 Click **Update**.

Configuring the Event Information page

Use Configure Event Information Page to control display options for the **Event Information** page in the portal. Different varieties of displayed information can be enabled or disabled and reordered.

To configure the **Event Information** page:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Event Information Page.

2 Select the **Enabled** check box for the course information fields that you want displayed.
3 Specify this information:

   Order
   Specify the order in which you would like the fields displayed.

4 Clear the **Enabled** check box for the course information fields that you do not want displayed.
5 Select the **Show Empty Values** check box for the course information fields that you want displayed even if they are empty.
6 Clear the **Show Empty Values** check box for the course information fields that you do not want displayed if they are empty.
7 Repeat these steps for the event details fields.
8 Click **Update**.

Configuring the Resource Information page

Use Configure Resource Information Page to control display options for the **Resource Information** page in the portal.

To configure the Resource Information page:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Resource Information Page.
2 Select the **Enabled** check box for the fields that you want displayed.
3 Specify this information:

   Order
   Specify the order in which you would like the fields displayed.

4 Clear the **Enabled** check box for the fields that you do not want displayed.
5 Select the **Show Empty Values** check box for the fields that you want displayed even if they are empty.
6 Clear the **Show Empty Values** check box for the fields that you do not want displayed if they are empty.
7 Click **Update**.

Configuring the Certification Programs page

Use Configure Certification Programs Page to control display options for the **Certification Programs** page in the portal.

To configure the **Certification Programs** page:

1 Select **System > System hierarchy level > Portals >** Manage Portals **> Portal name >** Configure Certification Programs Page.
2 Select the **Display** check box for the tabs that you want enabled.
3 Clear the **Display** check box for the tabs that you do not want enabled.
4 Select the default page that is displayed from the **Default page** item list.
5 Specify this information:

   Order
   Specify the order in which you would like the tabs displayed.

6 Click **Update**.

Configuring My Profile Page

The administrator can control the fields that appear on **My Profile Page**.

1 Select **System > Portals > Manage Portals > Portal name > Configure My Profile Page**.
2 Select visibility for each field under **Display Mode**:
   - **Hidden** - does not appear in the portal
   - **Read-Only** - a read-only field
   - **Optional** - the user may provide a value but the field is not required
   - **Required** - the user is required to provide a value
3 Specify **Display Order** for each field.
4 Click **Apply**.

Understanding Manage Dashboards

Use Manage Dashboards to set up a user dashboard, complete with widgets, which will provide users in your system with at-a-glance information in various forms. In Infor Learning Management, dashboards can be used as landing pages for users signing in to a portal. Dashboards can be populated with widgets that display useful at-a-glance information, such as RSS feeds, multimedia content, reports, and more. These types of widgets are available:

- RSS Widgets - to display RSS feeds on user dashboards.
- HTML Widgets - to display any desired HTML-formatted content.
- Announcements Widgets - similar to the HTML widget, but meant to have multiple items within them, as opposed to a single item in the general HTML widget.
- Ad Hoc Reports Widgets - to display a selected Ad Hoc report from your system directly in the portal, allowing user to view commonly-accessed reports without manually accessing them.

- Approaching Deadlines Widgets - to display a list of approaching training deadlines, reminding learners what activities they need to complete without manually checking the status of each of their courses.
- Newly Registered Learning Widgets - to display a list of learning activities a learner has recently registered for.
- iFrame Widgets - to display external web content such as web pages and multimedia, as well as other Infor Learning Management pages.

In addition, the layouts of the widgets that you add to a dashboard can be fully configured, and they may even be adjusted by learners in order to suit their individual preferences.

Creating a dashboard layout

Before you can add widgets to your dashboard page, you must create a layout to organize them. You can select from supplied layouts or create your own by manually creating and editing rows. Each row that you add can have up to three columns.

To create a dashboard layout:

1. Select **System > System hierarchy level > Portals >** Manage Dashboards **> Portal name >** Manage Dashboards.
2. Select a layout from the **Add Layout** item list.
3. Select **Add Row** to add your rows.
4. Click and drag the border of the columns to change the width.
5. Click **Save**.

Adding widgets

After you create your layout, you can add widgets. System performance can be adversely affected if you add too many widgets, but you can add as many widgets as you like provided that there is enough space in the layout to accommodate them. Sometimes, multiple widgets may be able to fit into one section of a layout row. Performance can be improved if you collapse each widget and let the user expand them when they want instead of having them expanded by default.

Note that rows and columns that are displayed on this page are NOT displayed in user portals. They are only used as an aid to help you lay out and determine the size of displayed widgets. They also form the basis of users' options to customize their layouts.

To add widgets:

1. Select **System > System hierarchy level > Portals >** Manage Dashboards **> Portal name >** Manage Dashboards.
2. Select the widget from the **Add Widget** item list.

3 Click and drag widgets to their locations.
4 Click **Save**.

Adding content to RSS widgets

Use these widgets to show RSS feeds on user dashboards. After you add a widget to the dashboard, you can add content.

To add content to an RSS widget:

1 Select **System > System hierarchy level > Portals >** Manage Dashboards **> Portal name >** Manage Dashboards.
2 Locate the widget.
3 Click **Add**. The **Configure RSS feed** window is displayed.
4 Specify this information:

Title
Specify a name for the feed.

URL
Specify the URL of the RSS feed.

Number of list items
Specify the number of items that should be displayed in the widget.

5 To only display the widget on certain user levels:
a Select the **Levels** tab.
b Select the check boxes for the levels where the widget is displayed.
c Clear the check boxes for the levels where the widget is not displayed.

6 Click **Save**.

Adding content to HTML/Announcements widgets

Use HTML widgets to show any desired HTML-formatted content. Use Announcements widgets like an HTML widget that is meant to have multiple items within them, as opposed to a single item. Although they are intended for different purposes, the HTML and Announcements widgets are edited in the same way. To have a widget that does not have an end date, you must select a start date before the current date, and an end date of 1/1/2100.

To add content to HTML/Announcements widgets:

1 Select **System > System hierarchy level > Portals >** Manage Dashboards **> Portal name >** Manage Dashboards.

2 Locate the widget.
3 Click **Add**. The **Configure Announcement/HTML content** window is displayed.
4 Specify the Title, Start Date, End Date, and this information:

   Content
   Specify the desired content. Under the field, select **Design** to use the WYSIWYG editor or choose **HTML** to edit the code itself.

5 To only display the widget on certain user levels:
   a Select the **Levels** tab.
   b Select the check boxes for the levels where the widget is displayed.
   c Clear the check boxes for the levels where the widget is not displayed.
6 To only display the widget to users in certain courses:
   a Click the **Courses** tab. Available courses are displayed. If not, you must select at least one level from the **Levels** tab to complete this.
   b Select a course from the **Available Courses** item list.
   c Click **Add**. The course is displayed in the Selected Courses field.
7 Click **Save**.

Adding content to Ad Hoc Reports widgets

Use Ad Hoc Reports widgets to display a selected Ad Hoc report from your system directly in the portal, allowing users to view commonly-accessed reports without manually accessing them. Ad Hoc reports must already exist in your system in order for them to be displayed by this widget.

To add content to an Ad Hoc Reports widget:

1 Select **System > System hierarchy level > Portals >** Manage Dashboards **> Portal name >** Manage Dashboards.
2 Locate the widget.
3 Select an Ad Hoc report from the item list.
4 Click **Save**.

Adding content to Newly Registered Learning/Approaching Deadlines widgets

Use Newly Registered Learning widgets to display a list of learning activities for which a learner has recently registered. Use Approaching Deadlines widgets to display a list of approaching training deadlines, reminding learners what activities they need to complete without manually checking the status of each of their courses. Although they display different content, these two widgets are edited in the same manner.

To add content to a Newly Registered Learning/Approaching Deadlines widget:

1 Select **System > System hierarchy level > Portals >** Manage Dashboards **> Portal name >** Manage Dashboards.
2 Locate the widget.
3 Select a time period from the **Time Period** item list.
4 Click **Save**.

Adding content to iFrame Widgets

Use iFrame widgets to display external web content such as web pages and multimedia, as well as other Infor Learning Management pages. You can specify the URL and height of the iFrame widget. By default, the height is set to 250 pixels.

To add content to an iFrame widget:

1 Select **System > System hierarchy level > Portals >** Manage Dashboards **> Portal name >** Manage Dashboards.
2 Locate the widget.
3 Specify a URL.
4 Specify the height of the iFrame.

Applying custom style sheets to your dashboard

Use Manage Dashboard Styles to apply custom style sheets to your user dashboard and customize the look and feel of your widgets.

To avoid potentially overwriting the code currently in place, it is recommended that you copy and paste that code into an external HTML/CSS editor.

To apply custom style sheets to your dashboard:

1 Select **System > System hierarchy level > Portals >** Manage Dashboards **> Portal name >** Manage Dashboard Styles.
2 To copy the existing code to your clipboard, click **Copy to Clipboard**.
3 Specify the code in the field.
4 Click **Update**.
5 To restore the default style sheet to your user dashboards, click **Reset to original values**.

Common fields

Use Common Fields to classify objects in Infor Learning Management for a variety of purposes, such as automating distribution of learning content and creating custom fields to be included with registration/cancellation forms for courses and events. After you create a common field, it can be associated with a selected subset of objects in Infor Learning Management.

These are examples of use scenarios for common fields:

- An organization created a "department" custom field which is a mandatory part of the user-account-creation process. Therefore any new user added to the system must have a department associated with them. For example, the "department" custom field could take the form of an item list containing options such as "Sales," "HR," etc. As a result, created courses can have distribution rules which rely on user departments. A course primarily aimed at a sales audience will only be distributed to users who were labeled as "Sales" during the creation of their accounts. In this manner, course distribution can be targeted to sub-groups of users even within the same level in the Infor Learning Management hierarchy. It also ensures that users looking for classes to enroll in through the portal don't see large amounts of irrelevant courses in their search results.
- An organization which conducts much of its training in live classrooms often requires that learners travel to attend training. To facilitate travel arrangements, a common field was created and associated with event registration templates, called "Hotel Needed?" Then, users can specify whether or not they will need the company to book accommodations for them for the duration of the training after they register for live events.
- An organization which allows users to self-register and cancel their enrollment in classes they pay for requires users to provide an explanation for cancelling in order to determine whether a refund for the cost of course enrollment is justified. A blank text field is displayed where users can specify their reason for cancelling enrollment.

Manage Common Fields

Adding a common field

Use **Add New** to create a new common field on page 403 in Infor Learning Management. You will need to make different selections depending on the type that you set for the common field. For example, an **Integer** type will need minimum and maximum values, a **Single Line of Text** type will need a maximum character count, and a **Choice** type will need a default value setting. After the new common field is saved, it is not possible to change the field's type. If the common field is created with the wrong type you will need to delete it and create it again to correct the error.

To add a common field:

1. Select **System > System hierarchy level > Common Fields >** Manage Common Fields **> Add New**.
2. Specify a Name and Description.
3. Select the type from the **Type** item list.

4 To make the common field active, select the **Active** check box.
5 Make additional selections based on the type that you selected.
6 To select the parent common field for the new common field, select it in the **Parent Common Field** item list.
7 For each of the object types with which the common field can be associated, select one of the following from the item list:
   - Select **Not Used** to specify that the common field will not be used with this object type.
   - Select **Included Field** to specify that the common field is included, but is not a mandatory field.
   - Select **Required Field** to specify that the common field is included and is a mandatory field that must be completed.
8 Click **Save**.

Viewing common fields

Use View to view information on the selected common field on page 402.

To view common fields:

1 Select **System > System hierarchy level > Common Fields >** Manage Common Fields **> Common field name >** View.
2 View the displayed information.

Editing a common field

Use Edit to change the settings for the selected common field on page 402.

To edit a common field:

1 Select **System > System hierarchy level > Common Fields >** Manage Common Fields **> Common field name >** Edit.
2 Specify a Name and Description.
3 To make the common field active, select the **Active** check box.
4 To select the parent common field for the new common field, select it in the **Parent Common Field** item list.
5 For each of the object types with which the common field can be associated, select one of the following from the item list:
   - Select **Not Used** to specify that the common field will not be used with this object type.
   - Select **Included Field** to specify that the common field is included, but is not a mandatory field.
   - Select **Required Field** to specify that the common field is included and is a mandatory field that must be completed.
6 Click **Save**.
7 To add information in another language, select the language from the **Available languages** item list and repeat these steps.

Removing a common field

Use Remove to remove the selected common field on page 402 from the system.

To remove a common field:

1. Select **System > System hierarchy level > Common Fields >** Manage Common Fields **> Common field name >** Remove. A confirmation message is displayed.
2. Click **Yes**.

Managing common field values

Use Manage Values to perform management operations on the selected common field on page 402. If the common field type is one where a user can add free form values, such as Single Line of Text, Manage Values is unavailable.

Adding a common field

Use **Add New** to create a new common field on page 403 in Infor Learning Management. You will need to make different selections depending on the type that you set for the common field. For example, an **Integer** type will need minimum and maximum values, a **Single Line of Text** type will need a maximum character count, and a **Choice** type will need a default value setting. After the new common field is saved, it is not possible to change the field's type. If the common field is created with the wrong type you will need to delete it and create it again to correct the error.

To add a common field:

1. Select **System > System hierarchy level > Common Fields >** Manage Common Fields **> Add New**.
2. Specify a Name and Description.
3. Select the type from the **Type** item list.
4. To make the common field active, select the **Active** check box.
5. Make additional selections based on the type that you selected.
6. To select the parent common field for the new common field, select it in the **Parent Common Field** item list.
7. For each of the object types with which the common field can be associated, select one of the following from the item list:
   - Select **Not Used** to specify that the common field will not be used with this object type.
   - Select **Included Field** to specify that the common field is included, but is not a mandatory field.
   - Select **Required Field** to specify that the common field is included and is a mandatory field that must be completed.
8. Click **Save**.

Importing new common field values from an Excel spreadsheet

You can import common field values from an Excel spreadsheet that you have created.

To import new values from an Excel spreadsheet

1. Select **System > System hierarchy level > Common Fields >** Manage Common Fields **> Common field name >** Manage Values.
2. Click **Import**. The **Open** window is displayed.
3. Select the file.
4. Click **Open**. The values are displayed.

Exporting the current common field values

You can export the current common field values in Infor Learning Management to a spreadsheet.

To export common field values to a spreadsheet:

1. Select **System > System hierarchy level > Common Fields >** Manage Common Fields **> Common field name >** Manage Values.
2. Click Export to Excel. The file is downloaded to your machine.

Viewing and editing the child values of a common field value

Use this to associate child values with common field values.

To view and edit the child values of a common field value:

1. Select **System > System hierarchy level > Common Fields >** Manage Common Fields **> Common field name >** Manage Values.
2. Expand the common field value.
3. Click the pencil icon. The **Child Value** window is displayed.
4. Select the child value.
5. Click **Save**.

Editing a common field value

You can edit the name, ID, and parent for any common field value.

To edit a common field value:

1. Select **System > System hierarchy level > Common Fields >** Manage Common Fields **> Common field name >** Manage Values.
2. Click the Pencil icon for the value.
3. Specify this information:

   Master Name
   Specify the name of the new value.

External (IMS) ID
Specify an external IMS ID for the value, if needed.

4 To change the parent of the value, select the new parent.
5 Click OK.

Removing a common field value

You can remove a common field value so that it is no longer displayed for that common field.

To remove a common field value:

1 Select **System > System hierarchy level > Common Fields >** Manage Common Fields **> Common field name >** Manage Values.
2 Click the Remove icon next to the field value.
3 Click **OK**.

Associating common fields with objects

Use Associate Common Fields to manage the common fields on page 402 that are associated with object types in Infor Learning Management. There are six types of objects with which common fields can be associated:

- Curriculum
- Resources
- Users
- Catalog
- Enrollment
- Cancellation

Each object is represented by a tab on this page.

Associating a common field with an object

You can add a common field to Curricula, Resources, Users, Catalogs, Enrollments, and Cancellations.

To add a common field to an object:

1 Select **System > System hierarchy level > Common Fields >** Associate Common Fields.
2 Select the tab for the object.
3 Select the check box for the Available Common Field.
4 Click **Add Field**. A confirmation message is displayed.
5 Click **OK**.

Changing the sequence of common fields for an object

After you have added common fields to an object, you can re-order them.

To change the sequence of common fields for an object:

1 Select **System > System hierarchy level > Common Fields >** Associate Common Fields.
2 Select the tab for the object.
3 Specify the sequence for the Associated Common Field.
4 Select **Apply sequence**.

Setting a common field as mandatory

You can set a common field as mandatory for an object so that users must specify the field value.

To set a common field as mandatory for an object:

1 Select **System > System hierarchy level > Common Fields >** Associate Common Fields.
2 Select the tab for the object.
3 Click the Mandatory icon.

Removing a common field from an object

You can remove any common fields that you have associated to an object. This does not delete the common field from the system. It only removes it from the object.

To remove a common field from an object:

1 Select **System > System hierarchy level > Common Fields >** Associate Common Fields.
2 Select the tab for the object.
3 Select the check box for the Associated Common Field.
4 Click **Remove**. A confirmation message is displayed.
5 Click **OK**.

Templates

Creating a common field template

Use **Add new** to create a new common field on page 402 template in Infor Learning Management.

There are two different types of templates you can create. You can create an Enrollment template, to support end users in providing information to instructors when they enroll for an event. You can create a Cancellation template to provide information to instructors as to why a user is cancelling their enrollment in an event. It is not possible to change the type of a common field template after the template is saved.

If the common field template is created with the wrong type you must delete it and create it again to correct the error.

To add a common field template:

1. Select **System > Hierarchy level > Common Fields >** Templates **> Add new**.
2. Specify the Name and Description.
3. Select a template type from the **Type** item list.
4. To make the common field template active, select the **Active** check box.
5. Add common fields to the template:
   a. Click Add Field.
   b. Select the common field from the **please select** item list.
   c. To have the common field displayed when this template is used in the portal, select the **Show in portal** check box. The **Edit in portal** check box is enabled.
   d. To make this common field editable by the user when this template is used in the portal, select the **Edit in portal** check box. The **Mandatory** check box is enabled.
   e. To make it mandatory that the user fill in or select a value for this common field when this template is used in the portal, select the **Mandatory** check box.
6. Click and drag the added common fields to order them.
7. To remove a common field from a template, click the Remove icon.
8. To create an alternate language version of the template text, click Save & Add another language.
9. Click **Save**.

Adding an existing template to the current level

Use **Add Existing Templates to the Current Level** to add an already-existing common field template to another hierarchy level in Infor Learning Management.

To add an existing template to the current level:

1. Select **System > Hierarchy level 2 or below > Common Fields >** Templates **> Add Existing Templates to the current Level**.
2. Search for the template.
3. Select the check box for the template.
4. Click **Submit**.

Viewing a common field template

Use View to view information on the selected common field template.

To view a common field template:

1. Select **System > Hierarchy level > Common Fields >** Templates **> Template name >** View.
2. View the displayed information.

Editing a common field template

Use Edit to change the settings for the selected common field template.

It is not possible to change the type of a common field template after the template is saved. If the common field template is created with the wrong type you must delete it and create it again to correct the error.

To edit a common field template:

1. Select **System > Hierarchy level > Common Fields >** Templates **> Template name >** Edit.
2. Specify a Name and Description.
3. To make the common field active, select the **Active** check box.
4. Add common fields to the template:
   a. Click Add Field.
   b. Select the common field from the **please select** item list.
   c. To have the common field displayed when this template is used in the portal, select the **Show in portal** check box. The **Edit in portal** check box is enabled.
   d. To make this common field editable by the user when this template is used in the portal, select the **Edit in portal** check box. The **Mandatory** check box is enabled.
   e. To make it mandatory that the user fill in or select a value for this common field when this template is used in the portal, select the **Mandatory** check box.
5. Click and drag the added common fields to re-order them.
6. To remove a common field from a template, click the Remove icon.
7. Click **Save**.

Removing a template

Use Remove to remove the selected common field template from Infor Learning Management.

To remove a template:

1. Select **System > Hierarchy level > Common Fields >** Templates **> Template name >** Remove. A confirmation dialog box is displayed.
2. Click **OK**.

Understanding relevant vocabulary

This list shows terms used throughout this appendix:

Master Course
The original course that is the basis for translation or localization. Copies are made of the master course to support the translation process or the localization process.

Course Copy
A copy of the master course. In most cases, copies are made for translation or for localization.

Course Copy / Master Course
A course copy / master course is a course that was originally a copy of another master course, but became a master course in relation to other copies. For example, an English locale course may be the master course for a course in the French – France locale. The French – France locale course may then become the master course for another copy in the French – Belgium locale.

Content Translation
The process whereby the master course is copied for translation and the 'text content' in the course copies are translated.

Content Localization
Generating copies of a master course with the intent to modify both content and text for a specific audience. For example, a company may offer a product course that is 85% the same content for all markets and 15% of the content needs to be enhanced for specific markets.

Translation Package
A ZIP package generated with all of the text content of the course for purposes of translation. This package contains HTML and XML files used by Infor Learning Management Content Creator during the export for translation process. This file is to be updated by 3rd party translation tools, such as Trados 2009 or Memo, with the translated text, and then the ZIP file is imported again.

Element
An element is simply a piece of content that can be translated. The following items are all elements:

1. **Course Meta Data**
   The course title, short name, description, audience, objectives, and the titles of environments, modules, special paths, and pages.

2. **Course Content**
   The 'text-only' content of each page.

3 **Interaction Properties**
The text used in Infor Learning Management Flash Templates or in Infor Learning Management question types such as the drag and drop and shredder, feedback text, and the text used for tokens.

Translation and localization process

There are a suite of tools in Infor Learning Management for the translation and localization of e-Learning content within Infor Learning Management. To best understand the course translation process in Infor Learning Management, it is first important to understand the relationship between the original course and the translated versions. When a course created with Infor Learning Management Content Creator is ready for translation, we call this the Master Course. The master version is copied to create new courses to be translated and/or localized. To streamline this process, Infor offers three tools through Infor Learning Management Administrator called the Course Copy and Translation Wizard, ILM Online Editor, and Course Publishing Wizard.

This list shows the high-level steps and tools that are involved in the successful translation of a single ILM course in multiple languages:

1. Course on Edit Server
2. Content edited with Online Editor
3. Option to notify changes to authors of copies
4. Option to push changes to copies
5. Export or merge multiple translation files
6. Review edits/translations with an online editor
7. Publish to Live Server using Publishing Wizard

Translation process scenarios

These scenarios detail processes and roles involved in translating and localizing courses in Infor Learning Management.

Scenario 1: Translation by a Translation Tool and Localization by Infor Learning Management Content Creator

For each course copy, a translation package can be exported. This package includes a combination of HTML, XML, and PPT files used by Content Creator to build/display a page. Translation packages are exported, translated with a third-party translation tool and merged through Infor Learning Management Administrator's Course Copy and Translation Wizard on page 112. After a merge is complete, the updated course can be viewed instantly online through either Infor Learning Management Learner or Infor Learning Management Online Editor. Alternatively, Infor Learning Management Online

Editor can be used to make direct onscreen translations. Localization changes such as adding/removing pages and repository/content replacements must be performed through Content Creator by an author.

Scenario 2: Translation and Localization within Infor Learning Management

In this scenario, the translation process is completely managed within Infor Learning Management. A user with authoring rights opens a course copy in the Infor Learning Management Online Editor to manually translate all text and metadata. This requires the translator to have a basic knowledge of the Online Editor tool. Translations are saved directly on the server. It is also recommended that the translator open the Master Course in Infor Learning Management Learner for reference and while working in the Online Editor. Localization changes such as adding/removing pages and repository replacements must be performed through Content Creator by an author.

Understanding the course copy wizard

After the Master Course is ready for translation and/or localization, all related processes are managed through a wizard interface available in Administrator. This six-step wizard on page 112 simplifies the creation and distribution of copies to business units, or levels, and specific authors for localization and manages tasks such as:

- Configuration of course objects in each copy. For example, authors may modify learning objects and documents but may not modify style sheets or flash templates, as they must be shared across all versions.
- Generation of HTML-compliant translation files into one ZIP package. These files are designed to work with third-party translation tools that support this format such as Trados™ 2009/2011.
- Enabling the export of the master course and copies for translation in a single package - this package contains the translation files of the master course and its copies within one ZIP package. In addition, it is also possible to export only changes that have made within the master course and its copies making the translation process more efficient.
- Configuring security settings to prevent content changes during the translation process.

Understanding how the ILM Online Editor is used in translation

After course copies are ready for translation, the Infor Learning Management Online Editor is launched through the Infor Learning Management Portal to manage the translation process. The Infor Learning Management Online Editor simplifies text editing, page layout changes, and other metadata changes such as flash template properties. The Master Course can be viewed through Infor Learning Management Learner while the copied version is opened and translated within Infor Learning Management Online Editor.

There is more information on the online editor in the *Infor Learning Management Portal User Guide*.

Understanding the Course Publishing Wizard

After the master course and copies are ready to be published to the live site, all related processes are managed through a wizard interface in Infor Learning Management Administrator. This wizard on page 87 simplifies the publishing and distribution of multiple courses to multiple levels at once and eliminates the need to perform this migration with Content Creator. Built-in security features prevent users without authoring rights on the live server from publishing to it. Authoring rights must still be configured on the live server.

Understanding content development guidelines

An extensive feature set to support the development, localization, and translation of courses is available in Infor Learning Management. However, it is important to adhere to specific guidelines when developing content that is expected to be translated. This section, provides you the required guidelines for developing translatable courses in Infor Learning Management Content Creator.

Preparing text for translation

During course development, text-formatting tools in Content Creator should be used when working with text. Copying text from Microsoft Office™ applications introduces MS-Office-specific coding that is not intended for a web environment. Typically, this increases the level of effort required to translate exported pages with a third-party translation tool such as Trados. Generally, avoid copying and pasting text from other applications when developing course content as much as possible. If copying and pasting from other applications is required, please follow these recommendations:

- Copy content from “filtered” sources such as WordPad and Notepad. After copying from Word™ or PowerPoint™ documents, make sure they are first saved with “Filtered” settings. You will see this option under the “Save As” menu. This will clean up the page source code and reduce the level of effort required in formatting text.
- Enable Content Creator’s native text filter by selecting the **Paste Text Only** check box under **Menu > Options > Main**.
- Before copying and pasting from MS Office applications, disable the ‘smart cut and paste’ feature. Click **File > Options**. The application options window is displayed. Click **Advanced**. Clear the **Use smart cut and paste** check box.
- Use HTML clean-up tools such as **HTML Tidy** to clean up and optimize the source code of a page.

Editable text in graphics

When text is required in a graphic or animation, the object should be designed to help prevent the need to recreate the graphic or animation during translation.

- Try using universal references, such as numbers instead of letters, within the graphic and place text in areas where it will be easy to cover up with new content.
- You can make text editable within a graphic by using tables. The most common method is to make the graphic a background image of the table and specify text where it should be placed. Insert the background image with the table properties on the toolbar. Tables also give you the added flexibility to overlay “text boxes” above graphics. To do this, create a 1x1-cell table and specify the desired text. Right-click the table, and select **Bring in front of text**. You can now position your text table anywhere over an inserted graphic.

Spacing of text for multiple languages

When designing your course, it is important to recognize that text translated from one language to another could change the amount of space it occupies on a page. In fact, some languages can require as much as 30% additional space because the translated strings become longer. This requires special consideration when text is inside tables.

Minimize text by using visualizations and icons

To simplify the translation and localization process, the goal is to avoid text whenever possible. Try to use graphics to represent your learning objectives. Also, use icons when possible to reduce text for things such as navigation controls or common links.

Use Flash Templates

All text in a Flash object is translatable when the object is designed as a Flash template. The XML file of each Flash template added to the course should account for:

- making text exportable for translation.
- changes made to font size, type and color.
- containing extra space for translations that result in increased amounts of text.
- files used in the XML fields should be replaceable through the repository viewer.

Advanced Flash designers may also make the Flash Template localizable by allowing the author to replace other elements such as graphics, sound clips, and colors through the Flash template editor. Contact Infor Xtreme Support for documentation on creating Flash templates.

Use Course Specific Learning Objects

Caution: When creating a course that needs to be translated, you can only use course-specific Learning Objects. Shared Learning Objects will be overwritten when translated throughout the various courses in which they are used.

Understanding the course copy process

Use Manage Copies and Translations to translate and localize e-learning content with Infor Learning Management Administrator. A course created with Infor Learning Management Content Creator can be copied and those copies can be translated and localized. The original course, referred to as the Master Course, is copied and its elements are translated or localized as necessary. Localization includes replacement of both text and images.

Use the Create Copies Wizard to create the course copies, after the Master Course is ready for translation and/or localization. This six-step wizard simplifies the creation and distribution of copies to business units, or levels, and specific authors for localization and manages tasks such as:

- Configuration of course objects in each copy. For example, authors may modify learning objects and documents but may not modify style sheets or flash templates, as they must be shared across all versions.
- Generation of HTML-compliant translation files into one ZIP package. These files are designed to work with third-party translation tools that support this format such as Trados™ 2009/2011.
- Enabling the export of the master course and copies for translation in a single package - this package contains the translation files of the master course and its copies within one ZIP package. In addition, it is also possible to export only changes that have made within the master course and its copies making the translation process more efficient.
- Configuring security settings to prevent content changes during the translation process.

In Step 1, you specify the number of course copies and select which levels need those copies. The **Course copies will be translated** checkbox is selected by default. If the copies require no additional localization in Content Creator and are ready for translation, then translation files are automatically created for each copy at Step 6 of the wizard. This option ‘locks’ the course to authors, meaning the courses cannot be retrieved in Content Creator, until the translation process is marked complete and the translated file is merged back through the wizard.

In Step 2, you can define the scope of repository assets of each course copy. Options are **Copy** to generate new course specific assets and **Share** to retain the existing assets by referring to the versions existing in the master course.

- If the Master Course assets are Course-Specific, selecting **Copy** will duplicate these assets in each course copy. Selecting **Share** will retain the assets’ unique identifiers and promote them to the System Folder.
- If the Master Course assets are at the System-level, selecting **Copy** will duplicate these assets and place them in the Course folder of each copy. Choosing **Share** will maintain their System scope for each copy.

If you expect a course asset to change during your translation and/or localization of the courses such as documents, learning objects, or images, then you should select the **Copy** option. You can also identify all copied assets when accessed through Content Creator. You may change this extension to the object names to a distinguishable tag such as a version number or date. By default, **Append the following text to each copied item** is set to “-copy”.

In Step 3, you specify the language and regional locale, new course name, and custom field values for each of the new copies. Client-defined course custom fields will be displayed if available. You can also lock course copies. If you lock a course during the copy process, the ability to edit the course copy in Infor Learning Management Content Creator is disabled until the translation file is merged with the course copy and the translation process is marked as complete.

In Step 4, all existing authors at the levels selected are displayed and you can assign them to copies. A single user can be assigned as an author for multiple copies of the course, but must be selected individually for each copy. This gives them authoring rights for that copy. Assigned authors can either retrieve the copy in Infor Learning Management Content Creator or access it through the Online Editor. Each copy is listed separately.

In Step 5, you can review the choices you've made in the Create Copies Wizard and make any last-minute changes needed.

In Step 6, you can start the process again or move on to downloading the exported translation files. The copy process is now complete and you have the option of downloading the translation files. You may download translation files from the parent and child levels. If any problems were encountered in creating the copies of the selected course, an exception report link will be generated to show you what parts of the copy process failed and why. If download is displayed, then the course will remain locked and cannot be retrieved in Infor Learning Management Content Creator or accessed through the Online Editor, until the translation file is merged and the translation process is marked complete on the course overview screen.

Creating course copies

A course created with Infor Learning Management Content Creator can be copied and those copies can be translated and localized. This six-step wizard simplifies the creation and distribution of copies to business units, or levels, and specific authors for localization.

To create course copies:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options > Manage Copies and Translations**.
2. To create a copy of the event for each course copy, select the **Add Events** check box.
3. Click Create Copies Wizard.
4. Complete **Create Copies Wizard Step 1 of 6**. In this step you determine how many copies of a selected course will be created and where they will be placed.
    a. To create course copies for translation, select the **Course copies will be translated** check box.
    b. Select the check box for each level in your Hierarchy where you would like to create a copy of the course. You may also click **Select All** to select all the listed levels, or click **Invert Selection** to reverse your current selections.

   c For each selected level, specify a value in the Number of Copies field.
   d Click **Next**.

5. Complete **Create Copies Wizard Step 2 of 6**.
   a Select **Copy** or **Share** from the **Course Specific and Shared** item lists for each option.

     Copied items will be replicated so that the copies can be modified as needed independent of the original item.

     Shared items will be shared with original course and any modifications made to them will be reflected in the original course and all of its copies.
   b Specify the following information:

     Append the following text to each copied item
     Specify text that will be added to the item name, so you may identify it as a copy.
   c Click **Next**.

6. Complete **Create Copies Wizard Step 3 of 6**.
   a Select a language from the **Locale** item list.
   b Specify the title of each copy of the course the Course Title field.
   c Select a custom field value for each course from the **Custom Field Value** item list.
   d To lock a course copy for translation, select the **Lock Course and Generate Translation File** check box.
   e Click **Next**.

7. Complete **Create Copies Wizard Step 4 of 6**.
   a Select the check box for the users you want to assign as a course author for each copy of the selected course.
   b Click **Next**.

8. Complete **Create Copies Wizard Step 5 of 6**.
   a To make any alterations to your Copy Options or Course Copies, click Edit.
   b Click **Finish**.

9. Complete **Create Copies Wizard Step 6 of 6**.
   a Click **Close** to return to the **Manage Copies and Translation** page.

Understanding the online editor

If you have authoring rights for courses in Infor Learning Management, you can open the Online Editor to edit Infor Learning Management courses. You must access the Online Editor from the Infor Learning Management Portal. Courses can be edited and updated through the Online Editor without the need for retrieving courses from the server. The online editor is intended only for making small changes to courses which already exist, and is not a dedicated authoring tool. Any major structural changes, such as adding or removing pages from the course, must be completed with the Content Creator. Examples of uses for the Online Editor are:

- Fixing typographical errors in course text or updating outdated information
- Removing or repositioning graphics and images
- Adjusting font sizes, colors, and types
- Editing flash template properties such as displayed text
- Replacing course text with translations directly in a course, when working with copies of Master courses for intended for translation

Translations and edits should be performed on your dedicated Edit site.

These courses are displayed in the online editor:

- Courses that are assigned to you
- Courses that are not going into the translation process and have not generated a file for translation
- Editable courses that have a setting of Publish/Retrieve

After you have made your changes to a master course, you can notify authors of the child courses of your change.

Opening the online editor

To use the Online Editor you must access it from the Infor Learning Management Portal.

Follow these steps to open the Online Editor:

1. Select **My Information > Launch Online Editor**. The Online Editor is displayed.
2. Use the Online Editor to edit your course.

Editing a course with ILM Online Editor

To use the Online Editor you must access it from the Infor Learning Management Portal. The editing tools included in the Infor Learning Management Online Editor consist of a range of standard WYSIWIG text editing tools.

To edit a course:

1. Select **My Information > Launch Online Editor**. The **Online Editor - Course List** is displayed.
2. Select Edit Course. The **Online Editor** is displayed.
3. To edit a page in the course:
   a. Select the page from the Tree View. If desired, you can click **Hide Tree** after selecting a page. Click **Show Tree** to view it again.
   b. Select the **Edit** tab.
   c. Remove the original text.
   d. Specify your changes.
   e. To modify text within Flash Templates, select the **Properties** tab to view all of these editable course elements. This tab is displayed to the right of the **Edit** tab.
   f. Click the **Browse** tab to preview the page. View Flash animations or test interactive pages.
4. Click **Save**. A confirmation message is displayed.
5. To notify authors of your changes, select the **Inform author(s) of child courses about this change** check box.
6. Click **Yes** to confirm your changes, or **No** to discard them. If this prompt is displayed when you try to switch from one course page to another, you can click **Cancel** to stay on the current course page without saving or discarding your changes.
7. If you are working on the Master version of a course and wish to propagate your changes to all copies of the course, click **Synchronize Changes**.

   Caution: It is important that you are absolutely sure you want ALL copies of a master course to be updated with the changes you make. If you click **Synchronize Changes**, the changes you have made will overwrite all other courses irreversibly. Authors are notified of this replacement.

8. To end your course editing session after saving or discarding your changes, click **Finish editing**.
9. To return to the **Online Editor - Course List** at any time, click **Course List**.

Generating a translation file

After you create a copy of a course, generate a translation file for the course. The downloaded translation file is a ZIP file labeled with a unique alphanumeric code. Do not change the name of or modify the folder structure of this ZIP file.

To generate a translation file:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options > Manage Copies and Translations >** Export for Translation. A confirmation message is displayed. If you choose the master course, then all existing copies are displayed on this screen.
2. Click **OK** to generate a translation file, or click **Cancel** to return to the **Manage Copies and Translation** page.
3. To create a translation packages for each listed copy click Export for Translation.
4. Click Download to save file.

Merging translated content

After you have a generated and downloaded a translation file, merge translated content that has gone through the translation process with a third-party translation tool, such as Trados 2009/2011. After each translation file is successfully merged, the QA process can begin online through Infor Learning Management Learner. The course is displayed under the **Administrative Courses** tab.

To merge translated content:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options > Manage Copies and Translations**.
2. Select Merge Translated Content. If a master course was selected, all existing copies are displayed.
   a. Click Merge Translated Content for the copy. A Merge Translated Content screen is displayed for that copy.
3. Click **Browse** to locate the file.
4. Select the file and click **Open**.
5. Click **Upload**. The merge process begins. After the process is complete, a confirmation massage is displayed.

Marking translation as complete

A course translation that has an exported translation file will not be retrievable in Infor Learning Management Content Creator or editable in Online Editor on page 420 until the translation process is marked as complete. You can still continue to merge translation files for the same course until it is marked complete.

After the translation is marked as complete, Merge Translated Content, Download Translation File, and Mark Translation File are disabled. Export Translation and View History are enabled.

To mark a translation as complete:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options > Manage Copies and Translations**.
2. Click Mark Translation Complete. If a master course was selected, all existing copies are displayed.
   a. Click Mark Translation Complete for the copy. A confirmation message is displayed.
3. Click **OK**. The times at which the course was marked complete and the names of the administrators that marked the course complete are displayed on a history tracking screen.
4. Click **Close**.

Viewing translation history

Throughout the translation and review process, there may be many versions of translation files merged into a course. Every time a translation file is merged with a course, that translation file is stored in an Infor Learning Management history folder. Use this process to access those files.

To view translation history:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options > Manage Copies and Translations >** View History.
2. To download the translation file, click on its filename.

Restoring course content

After working with course copies and translations, you may wish to restore master course content for a copy. Use Restore Master Course Content to restore the text content of the copied course to its original state from the master course. The course copy retains all of its repository assets, such as images, media and document files.

This is a maintenance feature and is provided to fix course content in case of unexpected issues. This should be executed after careful consideration and might be dangerous if the copy has been localized already.

To restore course content:

1. Select **Courses > Hierarchy Level 2 > Course Name > More Options > Manage Copies and Translations**.
2. Click Restore Master Course.

Course publishing wizard

Use **Course Publishing Wizard** to publish one or more Infor Learning Management courses from the edit server to the live server through Infor Learning Management Administrator.

To use the Course Publishing Wizard:

1 Select **Courses > Hierarchy Level 2 > Course Publishing Wizard**.

2 Specify this information:

ILM Live Server URL
Specify the URL of the Infor Learning Management Live Server. Do not include "http://" in the URL.

ILM Live Server author username
Specify the username of the course author.

ILM Live Server author password
Specify the password of the course author.

3 Click **Next**.

4 To narrow down the list of displayed courses, specify search text in the field and click **Filter**.

5 Select the check boxes for the courses.

6 To make changes to previously specified information click **Back**.

7 To abort the publishing process click **Cancel**.

8 Click **Next**.

9 To select the levels at which each course will be published:

a Click **Select Level**.

b Select the check box for the hierarchy level.

c To have Infor Learning Management also publish the course at all levels below the selected level, select the **Automatically check/uncheck sub-levels** check box.

d Click **Save** or to abandon your changes, click **Cancel**.

10 Click **Next**.

11 To have the publishing process abort if it encounters an error, select the **Stop on error** check box.

12 To abort the process without publishing, click **Cancel**.

13 To return to a previous step to make changes, click **Back**.

14 To begin the publishing process, click **Start**.

15 To manually cancel the publishing process while it is running, click **Cancel**.

16 To review the results of the publishing process for each course, click Log File.

17 Click **Close** to exit the wizard.

Archives

Views_name	column_name	Table and Fields Descriptions
Archive_CompletionSummaryRepByCourse_v		Shows History of Completion Summary Report By Course
	Completion_Type	Type of Completion
	CourseID	Course ID
	CourseName	Course Name
	EventID	Event ID
	EventName	Event Name
	Instructor	Instructor
	i_users_id	User ID
	Name	Name
	DtScored	Date User Took the Test
	EventIsCancelled	Event Is Cancelled
	Score	Score
	Equivalent_Course_Name	Equivalent Course Name
Archive_CompletionSummaryRepByCurriculum_v		Shows History of Completion Summary Report By Curriculum
	Completion_Type	Type of Completion
	CourseID	Course ID
	CourseName	Course Name
	CurriculaID	ID of the Curricula
	CurriculaName	Name of the Curricula
	DtScored	Date User Took the Test
	Equivalent_Course_Name	Equivalent Course Name
	EventID	Event ID
	EventIsCancelled	Indicates if Event Is Cancelled
	EventName	Event Name
	i_users_id	User ID
	Instructor	Instructor
	Name	Name

Views_name	column_name	Table and Fields Descriptions
	Score	Score
ArchiveCourseSession_v		Shows History of Course Session
	CourseId	Course ID
	CourseName	Course Name
	Duration	Session Duration For the User In Seconds
	DurationHMS	Session Duration For the User In Hh:Mm:Ss
	FirstName	First Name
	LastName	Last Name
	SessionStart	Session Start Date In Mm/Dd/Yyyy
	UserId	UserID User ID of the User
ArchiveCourseSessionSummary_v		Shows History of Course Session Summary
	AverageSessionDuration	Average Session Duration In Seconds
	AverageSessionDura-tionHMS	Average Session Duration In Hh:Mm:Ss
	CourseId	Course ID
	CourseName	Course Name
	EnrolledUserCount	Enrolled User Count
	MaximumSessionDuration	Maximum Session Duration In Seconds
	MaximumSessionDura-tionHMS	Maximum Session Duration In Hh:Mm:Ss
	MinimumSessionDuration	Minimum Session Duration In Seconds
	MinimumSessionDura-tionHMS	Minimum Session Duration In Hh:Mm:Ss
	NoSessionUserCount	Number of Users Who Have Not Started the Session
	SessionUserCount	Number of Users Who Have Started the Session
ArchiveCourseSessionSummaryByUser_v		Shows History of Course Session Summary By User
	Average Session Duration	Average Duration of the Session In Seconds
	Average Session Duration HMS	Average Duration of the Session In Hh:Mm:Ss
	Course ID	Course ID
	Course Name	Course Name
	Enrolled	Indicates if the User Is Enrolled (1=Yes, 0=No)
	First Name	First Name
	i_users_ID	User ID
	Last Name	Last Name
	Maximum Session Dura-tion	Maximum Session Time Taken By the User In Seconds

Views_name	column_name	Table and Fields Descriptions
	Maximum Session Duration HMS	Maximum Session Time Taken By the User In Hh:Mm:Ss
	Minimum Session Duration	Minimum Session Time Taken By the User In Seconds
	Minimum Session Duration HMS	Minimum Session Time Taken By the User In Hh:Mm:Ss
	No Sessions	Indicates if the User DID Not Start A Session (1=Yes/0=No)
	Sessions	Number of Sessions Started By the User
ArchiveCourseSummaryData_v		Shows History of Course Session Summary Data
	CourseId	Course ID
	CourseName	Course Name
	CustomField	Course Custom Field Associated With the Course
	CustomFieldValue	Value For the Course Custom Field
	DateScored	Date User Took the Test
	Equivalent_Course_Name	Equivalent Course Name
	FirstName	First Name
	LastName	Last Name
	ScoreUser	User ID
	SessionDate	Session Date
	SessionUser	User ID
	UserId	User ID
	UserScore	Latest Score Achieved By the User
ArchiveCourseUsageReport_eLearning_v		Shows History of Course Usage For E-Learning.
	Average Time Online Min	Average Time Online In Minutes
	Average Time Online Sec	Average Time Online In Seconds
	CourseName	Course Name
	Sessions between 8:00AM and 10:00PM Yesterday	Sessions Between 8 And 10 Yesterday
	Total Sessions	Total Number of Sessions
	Total Sessions in Last 24hr	Total Number of Sessions In the Last 24 Hours
ArchiveCourseUser_v		Shows History of Course User
	CourseId	Course ID
	CourseName	Course Name
	FirstName	First Name
	LastName	Last Name
	UserId	User ID

Views_name	column_name	Table and Fields Descriptions
ArchiveCourseUserScore_v		Shows History of Course User Score
	Assessment	Assessment Type
	CourseId	Course ID
	CourseName	Course Name
	DateClassroomEnd	Date when Classroom Portion of the Event Ends
	DateClassroomStart	Date when Classroom Portion of the Event Starts
	DateEventEnd	End Date of the Event
	DateEventStart	Start Date of the Event
	DateOnlineEnd	Online Event End Date
	DateOnlineStart	Date when Online Portion of Event Starts
	DateRegEnd	Event Registration End Date
	DateRegStart	Event Registration Start Date
	DateScored	Date when the Course Was Scored
	DateSelfCancelEnd	Date when Self-Cancellation Ends
	DateVLSEnd	Date when the Lms Portion of the Event Ends
	DateVLSStart	Date when Lms Portion of the Event Starts
	EnvId	Environment ID Based On the Relevant Section of the Course
	EnvName	Environment Name Environment Name Based On the Relevant Section of the Course
	Equivalent_Course_Name	Equivalent Course Name
	EventId	Event ID
	EventIsCancelled	Indicates if the Event Is Cancelled
	EventName	Event Name
	EventType	Type of the Event
	ExternalTestName	External Test Name
	FirstName	First Name
	FirstSessionDate	First Session Date
	IsExternalTest	Indicates if It Is An External Test
	IsManualCredit	Determines if User Received Course Credit
	LastName	Last Name
	LastSessionDate	Last Date of the Session Taken By the User
	MaxEnrollment	Maximum Enrollment
	MinEnrollment	Minimum Enrollment
	ModuleId	Module ID Based On the Relevant Section of the Course
	ModuleName	Module Name Based On Relevant Section of the Course

Views_name	column_name	Table and Fields Descriptions
	ModuleWeight	Module Weight For Scoring
	Notes	Event Notes
	TotalCorrect	Total Correct Answers Provided By the User
	TotalDuration	Total Duration of the Course In Seconds
	TotalDurationHMS	Total Duration of the Course In Hh:Mm:Ss
	TotalQuestions	Total Amount of Questions In the Course
	TotalSessions	Number of Sessions Availed By the User
	UserCompletionStatus	Course Status Based On the Availability of A Completion Date
	UserId	User ID
	UserStatus	Course Status With Respect To the User (Passed, Failed Or Undetermined)
	WeightedScore	Score the User Has Earned
ArchiveCourseUserSessionTotal_v		Shows History of Course User Session Total
	Course ID	Course ID
	Course Name	Course Name
	First Name	First Name
	FirstSessionDate	First Session Date
	Last Name	Last Name
	LastSessionDate	Last Session Date
	Total Duration	Total Duration of the Session In Seconds
	Total Duration HMS	Total Duration of the Session In Hh:Mm:Ss
	Total Session	Number of Sessions Started By the User
	User ID	User ID
ArchiveEventUser_v		Shows History of Event User
	CourseId	Course ID
	CourseName	Course Name
	DateRegistered	Registration Date
	EventId	Event ID
	EventName	Event Name (Enrolled/Cancelled Etc.)
	FirstName	First Name
	LastName	Last Name
	MonthRegistered	Month when the User Registered For the Event (Numerical)
	MonthYearRegistered	Registered Year And Month when the User Registered For the Event (Yyyy/Mm)
	UserId	User ID
	YearRegistered	Registration Year

Views_name	column_name	Table and Fields Descriptions
ArchiveSCORMResponseData_v		Shows History of Scorm Response Data
	CourseCreditsEarned	Credits the User Earned For the Course
	CourseCurrentScore	User'S Current Score
	CourseCurrentScoreDate	User'S Current Score Date
	CourseId	Course ID
	CourseName	Course Name
	CourseStatus	User'S Course Status
	CourseTotalDuration	Total Time the User Was In the Course In Seconds
	CourseTotalDurationHMS	Total Time the User Was In the Course In Hh:Mm:Ss
	CourseTotalSessions	User'S Total Sessions
	Equivalent_Course_Name	Equivalent Course Name
	FirstName	User'S First Name
	LastName	Lastname User'S Last Name
	SCORMActivityAttempt-Complete	Scorm Activity Attempt Complete
	SCORMActivityAttempt-CompletionAmount	Completion Amount For the Scorm Activity
	SCORMActivityAttempt-Count	Attempt Count For the Scorm Activity
	SCORMActivityCorrectRe-sponse	Scorm Interaction Correct Response
	SCORMActivityCredit	Credit For the Scorm Activity
	SCORMActivityDescrip-tion	Describes the Scorm Activity
	SCORMActivityEntry	Scorm Activity Entry
	SCORMActivityFirstCom-pleteDate	Scorm Activity First Completion Date
	SCORMActivityId	ID of the Scorm Activity
	SCORMActivityLesson-Mode	Scorm Activity Lesson Mode
	SCORMActivityLocation	Scorm Activity Location
	SCORMActivityProgress-Measure	Scorm Activity Progress Measure
	SCORMActivityScoreMax	Scorm Activity Maximum Score
	SCORMActivityScoreMin	Scorm Activity Minimum Score
	SCORMActivityScoreRaw	Scorm Activity Raw Score
	SCORMActivi-tyScoreScaled	Scorm Activity Scaled Score
	SCORMActivitySuc-cessStatus	Scorm Activity Success Status

Views_name	column_name	Table and Fields Descriptions
	SCORMActivitySuspend-Data	Scorm Activity Suspend Data
	SCORMActivityUserCom-ment	Scorm Interaction User Comment
	SCORMActivityUserRe-sponse	Scorm Interaction User Response
	SCORMInteractionId	Scorm Interaction ID
	SCORMInteractionIndex	Scorm Interaction Index
	SCORMInteractionType	Scorm Interaction Type
	SCORMObjectTitle	Title of the Scorm Object
	UserId	User ID
	UserName	Represents User'S First And Last Name
ArchiveUser_v		Shows History of User
	AccessExpirationDate	Date when User Will Not Have Access To Portal
	AccessTerm	Access Term
	Citizenship	User'S Current Country of Citizenship
	City	City Where the User Is Located
	Company	Company Where the User Works
	Country	Country Where the User Is Located
	CountryofBirth	Country Where the User Was Born
	CountryofOrigin	Country Where the User Hails From
	County	County Where the User Is Located
	Custom_1	Custom 1 Custom Field By the User
	Custom_2	Custom 2 Custom Field By the User
	Custom_3	Custom 3 Custom Field By the User
	Custom_4	Custom 4 Custom Field By the User
	Custom_5	Custom 5 Custom Field By the User
	Custom_6	Custom 6 Custom Field By the User
	DateGraduated	User'S Graduation Date
	DateHired	Date when the User Was Hired
	DateofBirth	Date of Birth of the User
	DateRegistered	Registration Date Mm/Dd/Yyyy
	Deduction	Deduction Represents Any Monetary Deduction For the User
	Department	Department of the User
	EducationLevel	Education Level of the User
	Email	Email ID of the User

Views_name	column_name	Table and Fields Descriptions
	EmergencyContact	Emergency Contact of the User
	EmergencyPhone	Emergency Phone Number of the User
	EmployeeId	Employee ID of the User
	Extension	Extension Number of the User
	Fax	Fax Number of the User
	FirstName	First Name
	Gender	Gender of the User
	Hobby	Hobby of the User
	HomePhone	Home Number of the User
	IsActive	Indicates if the User Is Active
	LastName	Last Name
	LocaleID	Locale ID
	LoginName	Login Name of the User
	MaritalStatus	Marital Status of the User
	NickName	Nickname of the User
	PaymentProfileId	Payment Profile ID of the User
	Phone	Phone Number of the User
	RegionalLocalID	Regional Local ID
	Salary	Salary of the User
	SchoolGraduated	School the User Graduated From
	SpouseName	Spouse Name of the User
	SSN	Social Security Number of the User
	State	State From Where the User Hails
	StreetAddress	Street Address of the User
	StreetAddress2	Street Address 2 of the User
	SupervisorId	User ID 'S Supervisor
	SupervisorIdTxt	User ID 'S Supervisor
	Title	Title of the User
	UniqueId	Unique ID of the User
	UserId	User ID
	UserName	Name of the User
	Zip	Zip Code of the User
ArchiveUserCourseScore_v		Shows History of User Course Score
	AssessmentName	Name of Assessment
	CourseID	Course ID

Views_name	column_name	Table and Fields Descriptions
	CourseName	Course Name
	DateScored	Date Scored
	Equivalent_Course_Name	Equivalent Course Name
	Firstname	First Name
	LastName	Last Name
	Score	Score
	UserId	User ID
	UserStatus	Course Status With Respect To the User (Passed, Failed Or Undetermined)
ArchiveUserScore_v		Shows History of User Score
	Assessment	Assessment Type
	CourseId	Course ID
	CourseName	Course Name
	CreditsEarned	Credits Earned By the User By Passing the Course. if the User Could Not Pass the Course, the Field Contains 0.
	DateScored	Date Scored
	EnvId	Environment ID Based On the Relevant Section of the Course
	EnvName	Environment Name Based On the Relevant Section of the
	Equivalent_Course_Name	Equivalent Course Name
	EventId	Event ID
	EventName	Event Name
	ExternalTestName	External Test Name
	FirstName	First Name
	IsCreditsEarned	Indicates if Credit Earned
	IsCurrentModeScore	Indicates if In Current Mode Score
	IsCurrentScore	Indicates if Current Score
	IsExternalTest	Indicates if External Test
	IsManualCredit	Indicates if Manual Credit
	LastName	Last Name
	ModuleId	Module ID Based On the Relevant Section of the Course
	ModuleName	Module Name Based On Relevant Section of the Course
	ModuleWeight	Module Weight For Scoring
	TotalCorrect	Total Correct Answers Provided By the User
	TotalDuration	Total Duration of the Course In Seconds
	TotalDurationHMS	Total Duration of the Course In Hh:Mm:Ss
	TotalQuestions	Total Amount of Questions In the Course

Views_name	column_name	Table and Fields Descriptions
	TotalSessions	Number of Sessions Availed By the User
	UserCompletionStatus	Course Status Based On the Availability of A Completion Date
	UserId	User ID
	UserStatus	Course Status With Respect To the User (Passed, Failed Or Undetermined)
	vch_equivalent_course_id	ID of Equivalent Course
	WeightedScore	Score the User Has Earned

Audit

Views_name	column_name	Table and Fields Descriptions
spAuditTrailGetLevelCourseHistoryChangeSet		Changes in course level settings
	courseID	Course ID
	levelId	Level ID
	propertyName	Course Name fields that was modified
	oldValue	Old course field value
	newValue	New course field value
	updatedBy	Login name of the user who modified the record
	updatedByUserID	Modified by (user ID)
	modificationDate	Date when the course field was last modified
spAuditTrailGetCourseHistoryChangeSet		Changes in course information which are not localized or in master locale.
	courseID	Course ID
	propertyName	Course Name fields that was modified
	oldValue	Old course field value
	newValue	New course field value
	updatedBy	Login name of the user who modified the record
	updatedByUserID	Modified by (user ID)
	modificationDate	Date when the course field was last modified
spAuditTrailGetCourseCommonFieldHistoryChangeSet		Changes in course common fields
	courseID	Course ID
	commonFieldName	Common field name
	commonFieldId	Common field ID
	oldValue	Old common field value
	newValue	New common field value
	updatedBy	Login name of the user who modified the record
	updatedByUserID	Modified by (user ID)
	modificationDate	Date when the common field was modified
spAuditTrailGetCourseCustomFieldHistoryChangeSet		Changes in course custom fields

Views_name	column_name	Table and Fields Descriptions
	courseID	Course ID
	levelID	Level ID
	customFieldId	Custom field ID
	customFieldName	Custom field name
	isSystemWide	Indicates if changes to custom field is system wide
	oldValue	Old custom field value
	newValue	New custom field value
	updatedBy	Login name of the user who modified the record
	updatedByUserID	Modified by (user ID)
	modificationDate	Date when the custom field was modified
spAuditTrailGetCourseInfoAttributesLocalizedHisto-ryChangeSet		Changes in course localized attributes. Not showing changes in master locale, these are part of overall course information
	courseID	Course ID
	LCID	LCID
	propertyName	Localized attributes of the course that were modified
	oldValue	Old field value
	newValue	New field value
	updatedBy	Login name of the user who modified the record
	updatedByUserID	Modified by (user ID)
	modificationDate	Date when the field was modified
spAuditTrailGetEventLevelHistoryChangeSet		Changes in event's level settings (e.g. defaulting)
	eventID	Event ID
	levelId	Event level ID
	propertyName	Modified field name
	oldValue	Old field value
	newValue	New field value
	updatedBy	Login name of the user who modified the record
	updatedByUserID	Modified by (user ID)
	modificationDate	Date when the field was modified
spAuditTrailGetEventCustomFieldHistoryChangeSet		Changes in course custom fields
	eventID	Event ID
	levelID	Event level ID
	customFieldID	Custom field ID
	customFieldName	Custom field name
	isSystemWide	Indicates if change is system-wide

Views_name	column_name	Table and Fields Descriptions
	oldValue	Old field value
	newValue	New field value
	updatedBy	Login name of the user who modified the record
	updatedByUserID	Modified by (user ID)
	modificationDate	Date when the field was modified
spAuditTrailGetEventAttributesLocalizedHistoryChangeSet		Changes in event's localized attributes. Not showing changes in master locale, these are part of overall event information
	eventID	Event ID
	LCID	Localized attributes ID
	propertyName	Modified field name
	oldValue	Old field value
	newValue	New field value
	updatedBy	Login name of the user who modified the record
	updatedByUserID	Modified by (user ID)
	modificationDate	Date when the field was modified
spAuditTrailGetEventHistoryChangeSet		Changes in event information
	eventID	Event ID
	propertyName	Modified field name
	oldValue	Old field value
	newValue	New field value
	updatedBy	Login name of the user who modified the record
	updatedByUserID	Modified by (user ID)
	modificationDate	Date when the field was modified
spAuditTrailGetUserCommonFieldsHistoryChangeSet		Changes in user common fields.
	userId	Modified by (user ID)
	commonFieldName	Common field name
	commonFieldID	Common field ID
	oldValue	Old common field value
	newValue	New common field value
	updatedBy	Login name of the user who modified the record
	updatedByUserID	Modified by (user ID)
	modificationDate	Date when the common field was modified
spAuditTrailGetUsersAndUserFieldsHistoryChangeSet		Changes in user profile and user fields
	userId	Modified by (user ID)
	propertyName	Modified user field name

Views_name	column_name	Table and Fields Descriptions
	oldValue	Old common field value
	newValue	New common field value
	updatedBy	Login name of the user who modified the record
	updatedByUserID	Modified by (user ID)
	modificationDate	Date when the common field was modified
CourseUserHistory_v		Course user history
	CourseId	Course ID
	CourseName	Course name
	CourseStatus	Course status
	FirstName	First name
	LastName	Last name
	ResetDate	Course reset date (January 1, 1900 if never reset)
	UserId	User ID
CourseAttributesLocalizedHistory_v		Changes in localized attributes in a course
	CourseId	Course ID
	LCID	Localized attributes ID
	CourseName	Course name
	ShortName	Course short name
	Description	Course description
	Objectives	List the objectives of the course
	Audience	Audience
	ModificationDate	Date when the field was modified
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
CourseCommonFieldHistory_v		Course common field history
	CourseId	Course ID
	CFID	Common field ID
	CFName	Common field name
	CFValue	Common field value
	ModificationDate	Date when the field was modified
	DateCreated	Field creation date
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)

Views_name	column_name	Table and Fields Descriptions
	IsDeleted	Indicates if the record is deleted
CourseCostHistory_v		Course Cost History
	CourseId	Course ID
	LevelId	Level ID
	Cost	Course cost
	Type	Course Type
	CurrencyId	Currency ID
	ModificationDate	Date when the field was modified
	DateCreated	Field creation date
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
	IsDeleted	Indicates if the record is deleted
CourseCustomFieldHistory_v		Course custom field history
	CourseId	Course ID
	CustomFieldId	Custom field ID
	CustomFieldName	Custom field name
	CustomFieldValue	Custom field value
	LevelId	Level ID
	ModificationDate	Date when the field was modified
	DateCreated	Field creation date
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
	IsDeleted	Indicates if the record is deleted
	IsSystemWide	Indicates if changes to custom field is system wide
CourseHistory_v		Course History
	Audience	Audience
	CourseId	Course ID
	CourseName	Course name
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	Credits	Course credit value

Views_name	column_name	Table and Fields Descriptions
	DateCreated	Record creation date
	DateLastPublished	Last published date
	Description	Course description
	Duration	Course duration
	IsActive	Indicates if the course is active
	IsCheckedOut	Indicates if the record is checked out
	IsDeleted	Indicates if the record is deleted
	IsEditable	Indicates if the record is editable
	IsIMSLocked	Indicates if the record is IMS locked
	ModificationDate	Date when the field was modified
	Objectives	List the objectives of the course
	ShortName	Course short name
	UniqueCourseId	Course Unique ID
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
CourseLevelHistory		Course Level History
	DateCreated	UTC creation date
	Default	Indicates if the course is default on the level
	IsDeleted	Indicates if the course is deleted from the level
	LevelID	Level ID
	ModificationDate	UTC modification date
	NewEventFlag	New Event Flag indicator
	ParentDefault	Indicates if the parent level is default
	UpdatedBy	User or application that updated the course level
	UpdatedByUserId	User ID or application that updated the course level
EventUserHistory_v		Event registration history
	CourseId	Course ID
	CourseName	Course name
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	DateCompleteDeadline	Completion deadline date
	DateCompleteStart	Completion start date
	DateModified	Record modification date
	DateRegistered	Registration date
	EventId	Event ID

Views_name	column_name	Table and Fields Descriptions
	EventName	Event name
	FirstName	First name
	IsDeleted	Indicate if record is deleted
	LastName	Last name
	MonthRegistered	User registration - Month
	MonthYearRegistered	User registration - Year
	TotalCompletionDays	Total days to completion
	UpdatedBy	User who updated the record
	UpdatedByUserId	User ID of the user who updated the record
	UserId	User ID
	YearRegistered	Registration - Year
EventCustomFieldHistory_v		Event custom field history
	EventId	Event ID
	CustomFieldId	Custom field ID
	CustomFieldName	Custom field name
	CustomFieldValue	Custom field value
	LevelId	Event level ID
	ModificationDate	Date when the field was modified
	DateCreated	Field creation date
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
	IsDeleted	Indicates if changes to custom field is deleted
	IsSystemWide	Indicates if changes to custom field is system wide
EventHistory_v		Event history
	EventId	Event ID
	EventName	Event name
	CourseId	Course ID
	EventType	Event type
	MaxEnrollment	Maximum enrollment total
	MinEnrollment	Minimum enrollment total
	DateEventStart	Event start date
	DateEventEnd	Event end date
	DateVLSStart	VLS event start date

Views_name	column_name	Table and Fields Descriptions
	DateVLSEnd	VLS event end date
	DateOnlineStart	Online event start date
	DateOnlineEnd	Online event end date
	DateRegStart	Registration start date
	DateRegEnd	Registration end date
	IsCancelled	Indicates if the event was cancelled
	DateEventCancelled	Event cancelation date
	DateEvaluationStart	Event evaluation start date
	DateEvaluationEnd	Event evaluation end date
	CompletionDeadlineDate	Completion deadline
	CompletionDeadlineDays	Days until completion date
	CompletionResetDeadline	Indicates if deadline completion date was reset
	IsAvailableAfterDeadline	Indicates if completion is still available after deadline date
	Notes	Notes
	CancelFeeDate	Cancelation fee date
	CancelFee	Cancelation fee
	CurrencyId	Currency ID
	DateSelfCancelEnd	Self-cancelation end date
	EventGMToffset	GMT offset
	EventTimezone	Event time zone
	MaxWaitlistUsers	Waitlist maximum user limit
	PostEventInstructions	Post-event instructions
	AutoMarkAttendace	Indicates if event attendance is auto-marked
	AutoMarkCredit	Indicates if event credit is auto-marked
	IsDeleted	Indicates if event is deleted
	DateCreated	Field creation date
	ModificationDate	Date when the field was modified
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
EventCostHistory_v		Event cost history
	EventId	Event ID
	ItemName	item name of the event
	EstimatedCost	estimated cost of the event

Views_name	column_name	Table and Fields Descriptions
	ActualCost	actual cost of the event
	CurrencyId	Currency ID
	ModificationDate	Date when the field was modified
	DateCreated	Field creation date
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
	IsDeleted	Indicates if the event cost was deleted
EventLevelHistory_v		Event level settings history
	EventId	Event ID
	LevelId	Event level ID
	SelfRegAllowed	Indicates if self registration is allowed
	SelfCancelAllowed	Indicates if self cancellation is allowed
	Default	Indicates if the event is the default event in level
	ParentDefault	Indicates if the default event is the event in parent level
	ApprovalRequired	Indicates if approval is required
	ModificationDate	Date when the field was modified
	DateCreated	Field creation date
	CancelFee	amount of cancellation
	Price	amount price of event
	CurrencyId	ID of currency
	IsDeleted	Indicates if event is deleted
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
EventUserCancelledHistory_v		User event cancellation history
	CourseId	Course ID
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	DateCancelled	Cancelation date
	DateModified	Modification date
	EventId	Event ID
	EventUserCancelledId	Cancelation transaction ID

Views_name	column_name	Table and Fields Descriptions
	FirstName	First name
	IsDeleted	Indicates if event is deleted
	LastName	Last name
	SelfCancellation	Indicates if event is cancelled by user
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
	UserId	User ID of the user who created the record
ExternalTestscoreHistory_v		History of external tests cores
	AssesmentType	Assessment type
	Comment	Comment
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	DateCreated	Creation date
	DateModified	Modification date
	DateScored	Date when the user scored
	ExternalTestID	External test ID
	FirstName	First name
	IsDeleted	Indicates if Course is deleted
	LastName	Last name
	Score	User score
	Status	Status
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
	UserID	User ID of the user who created the record
LevelUserHistory_v		User level movement history
	LevelID	Level ID
	ModificationDate	UTC change date
	StatusChange	Status change of the user on the specific level
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
	UserID	User ID
PendingApprovalListHistory_v		Pending approval list history
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	DateModified	Modification date

Views_name	column_name	Table and Fields Descriptions
	DateRequested	Request date
	DateResponded	Response date
	Email	Requestor email address
	EventId	Event ID
	FirstName	First name
	LastName	Last name
	PendingApprovalListId	Cancelation transaction ID
	RespondedFromIP	Approver IP address
	Status	Approval status
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
	UserId	User ID of the user who created the record
PendingWaitListHistory_v		Pending wait list history
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	DateModified	Modification date
	DateWaitListed	date of wait list
	EventId	Event ID
	FirstName	First name
	IsDeleted	Indicates if event is deleted
	LastName	Last name
	Notification	Indicates if there is a notification
	PendingWaitListId	Cancelation transaction ID
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
	UserId	User ID of the user who created the record
	WaitingNumber	Waitlist number
UserCoursescoreHistory_v		User course score history
	AssesmentType	Assessment type
	CECreditCheck	Indicates if there is a CE Credit
	CourseID	Course ID
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	DateCreated	Creation date
	DateModified	Modification date

Views_name	column_name	Table and Fields Descriptions
	DateScored	Date when the user scored
	FirstName	First name
	IsDeleted	Indicates if Course is deleted
	LastName	Last name
	Score	User score
	Status	Status
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
	UserCoursescoreID	Cancelation transaction ID
	UserID	User ID of the user who created the record
UserLastscoreHistory_v		User last score history
	AssesmentType	Assessment type
	CourseID	Course ID
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	DateCreated	Creation date
	DateModified	Modification date
	DateScored	Date when the user scored
	EnvironmentID	Unique environment ID based on the section
	EventID	Event ID
	FirstName	First name
	IsDeleted	Indicates if Course is deleted
	LastName	Last name
	ModuleID	Module ID
	ModuleWeight	Module weight
	Status	Status
	TotalCorrect	Total of the correct answers
	TotalQuestions	Question total
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
	UserId	User ID of the user who created the record
	UserLastscoreID	Cancelation transaction ID
	UserWeight	User weight score
UsersHistory_v		User profile and user fields history
	UserName	User name

Views_name	column_name	Table and Fields Descriptions
	UserId	User ID
	LoginName	Login name
	Email	User email address
	LastName	Last name
	FirstName	First name
	Gender	Gender
	NickName	Nickname
	DateRegistered	Enrollment/registration date
	Department	Department name
	SupervisorId	Supervisor ID
	Title	Title
	DateHired	Hire date
	EmployeeId	Employee ID
	SSN	Social security number
	UniqueId	Unique ID
	StreetAddress	street address of the user
	StreetAddress2	Street address
	County	County
	City	City
	State	State
	Country	Country
	Zip	Zip code
	Company	Company
	DateofBirth	Date of birth
	CountryofBirth	Country of birth
	Citizenship	Citizenship
	CountryofOrigin	Country of origin
	Phone	Phone number
	Extension	Phone extentions
	EducationLevel	Education level
	SchoolGraduated	School graduated
	DateGraduated	Date graduation
	MaritalStatus	Marital Status
	SpouseName	Spose name
	Salary	Salary
	Deduction	Deduction

Views_name	column_name	Table and Fields Descriptions
	EmergencyContact	Emergency contact name
	EmergencyPhone	Emergency contact phone number
	Hobby	Hobby
	Custom_1	Custom field
	Custom_2	Custom field
	Custom_3	Custom field
	Custom_4	Custom field
	Custom_5	Custom field
	Custom_6	Custom field
	IsActive	Indicates if the user is active
	PaymentProfileId	Payment profile ID
	AccessExpirationDate	Access expiration date
	AccessTerm	Access term
	DateDeactivation	Payment deactivation date
	DateLeave	Leave date
	DateLeaveDeactivation	Leave date deactivation
	Fax	Fax number
	HomePhone	Home phone
	IsDeleted	Indicates if the user is deleted
	DateCreated	Date of creation
	ModificationDate	Modification date
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	Created by (user ID)
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
UserCommonFieldHistory_v		User common fields history
	CFID	Common field ID
	CFName	Common field name
	CFValue	Common field value
	CreatedBy	User name/application that created the common field value
	CreatedByUserId	User ID who created the common field value, NULL if it's an application
	DateCreated	UTC creation date
	IsDeleted	Indicates if the value was deleted
	ModificationDate	UTC Date of the change
	UpdatedBy	User name/application that updated the common field value

Views_name	column_name	Table and Fields Descriptions
	UpdatedByUserId	User ID who updated the common field value, NULL if it's an application
	UserID	User ID

Certificates

Views_name	column_name	Table and Fields Descriptions
Certificate_v		Certificate Details
	CertificateCode	Certificate Program Code
	CertificateId	Certificate ID
	CertificateName	Name of the Certificate Program
	CertificationLevelID	ID of the Certification Level
	CertificationLevelName	Name of the Certification Name
	CertificationProgramID	ID of the Certification Program
	CertificationProgramName	Name of the Certification Program
	CertificationRequirement-GroupID	ID of the Certification Requirement Group
	CertificationRequirement-GroupName	Name of the Certification Requirement Group
	DateExpires	Date when the Certificate Expires
	Description	Describes the Certificate
	OrganizationName	Organization Name of the Certificate Program
	ValidForDays	Number of Days when the Certificate Will
CertPrograms_v		Structure of Either Basic Or Advanced Certification Pro-grams
	CertificationLevelCode	Level Code Assigned To the Program Level
	CertificationLevelID	Unique ID of the Program Level
	CertificationLevelName	Program Level Name
	CertificationLevelSe-quence	Program Level Sequence Number
	CertificationProgramCode	Overall Program Code Populated By the Administrator
	CertificationProgramID	Unique ID Set For the Program
	CertificationProgramName	Name of the Program
	RequirementCredits	Number of Credits Assigned To the Requirements
	RequirementGroupCode	Code Assigned To the Requirement Group
	RequirementGroupCredits	Credits Assigned To the Requirement Group

Views_name	column_name	Table and Fields Descriptions
	RequirementGroupICCred-its	Credits Assigned To A Requirement Group
	RequirementGroupID	Unique ID Assigned To A Requirement Group
	RequirementGroupManda-tory	Displays if the Requirement Group Is Mandatory
	RequirementGroupName	Requirement Group Name
	RequirementGroupOption-al	Displays if the Requirement Group Is Optional
	RequirementGroupRC-Credits	
	RequirementGroupSe-quence	Sequential Order of the Requirement Group
	RequirementID	Unique ID of the Requirement
	RequirementMandatory	Requirement Setting of Mandatory Or Elective
	RequirementName	Requirement Name
	RequirementSequence	Sequential Order of the Requirement
	RequirementType	Type of Requirement (I.E. Module, Course,Or Curriculum)
	RequirementTypeID	Unique ID For the Type of Requirement
CertificateLevel_v		Location of Certificates in the Level Hierarchy.
	Branch	Name of the Parent Level 2 Field For Any Level. For Level 2 Fields, It Contains "System"
	CertificateId	Certificate ID
	CertificateName	Name of the Certificate Program
	CertificationLevelID	ID For the Certification Level
	CertificationLevelName	Name For the Certification Level
	CertificationProgramID	ID of the Certification Program
	CertificationProgramName	Name of the Certification Program
	CertificationRequirement-GroupID	ID of the Certification Requirement Group
	CertificationRequirement-GroupName	Name of the Certification Requirement Group
	i_vls_level_id	Level ID Where the Certificate Is Located
	LevelName	Name of the Level Where the Certificate Is Located
	LevelNode	Level Tier (System Is 1) Where the Course Is Located
CertificateUser_v		This View Contains Details Regarding Certificate User
	CertificateId	Certificate ID
	CertificateName	Name of the Certificate Program
	CertificationLevelID	ID For the Certification Level
	CertificationLevelName	Name For the Certification Level

Views_name	column_name	Table and Fields Descriptions
	CertificationProgramID	ID of the Certification Program
	CertificationProgramName	Name of the Certification Program
	CertificationRequirement-GroupID	ID of the Certification Requirement Group
	CertificationRequirement-GroupName	Name of the Certification Requirement Group
	CompletionStatus	Completion Status
	CurrentRecord	Indicates if This the Current Status of Certificate (1/0)
	DatePassed	Date when the Certificate Program Was Passed
	DateRecertificationStart	Date when the Recertification Started
	DateValidUntil	Date when the Certificate Program Expires
	FirstName	First Name of User
	IsCurrentRecord	Indicates if This the Current Status of Certificate (Yes/No)
	IsGranted	Indicates if the Certificate Was Granted
	IsPass	Indicates if the User Passed
	LastName	Last Name
	UserId	User ID Assigned Certificate
	ValidForDays	Number of Days Valid
CertificateUserExpire_v		Users With Valid Or Expired Certificates
	CertificateId	Certificate ID
	CertificateName	Name of the Certificate Program
	CertificationLevelID	ID For the Certification Level
	CertificationLevelName	Name For the Certification Level
	CertificationProgramID	ID of the Certification Program
	CertificationProgramName	Name of the Certification Program
	CertificationRequirement-GroupID	ID of the Certification Requirement Group
	CertificationRequirement-GroupName	Name of the Certification Requirement Group
	CourseID	ID of the Selected Course
	CourseName	Course Name
	DateScored	Date when the Course Was Scored
	ExpireAfter90Days	Status of A User Whose Certifications Are Expired Greater Than 90 Days. (1 = Expired And 0 = Not Yet Expired)
	ExpireIn30Days	Status of A User Whose Certification Will Expire Within 30 Days. (1 = Expired And 0 = Not Expired)
	ExpireIn60Days	Status of A User Whose Certification Will Expire Within 30 Days. (1 = Expired And 0 = Not Expired)

Views_name	column_name	Table and Fields Descriptions
	ExpireIn90Days	Status of A User Whose Certification Will Expire Within 30 Days. (1 = Expired And 0 = Not Expired)
	ShortName	Course Short Name
	UserCompletionStatus	Course Status Based On Completion
	UserFirstName	First Name
	UserId	ID of User Assigned To the Certificate
	UserLastName	Last Name
	UserStatus	Passed Or Failed Course Assigned To
	ValidForDays	Number of Days After Which the Certificate
	ValidUntil	Date when the Certificate Will Expire
	WillExpireAfter90Days	Represents when the Certificate Will Expire After 90 Days
	WillExpireIn30Days	Represents when the Certificate Will Expire In 30 Days
	WillExpireIn60Days	Represents when the Certificate Will Expire In 60 Days
	WillExpireIn90Days	Represents when the Certificate Will Expire In 90 Days
CertificateUserExpireSummary_v		Summary of Users With Valid Or Expired Certificates.
	CertificateId	Certificate ID
	CertificateName	Certificate Name
	CertificationLevelID	Certification Level ID
	CertificationLevelName	Certification Level Name
	CertificationProgramID	Certification Program ID
	CertificationProgramName	Certification Program Name
	CertificationRequirement-GroupID	Certification Requirement Group ID of the Certification Re-quirement Group
	CertificationRequirement-GroupName	Name of the Certification Requirement Group
	ExpireAfter90Days	Status of A User Whose Certifications Are Expired Greater Than 90 Days. (1 = Expired And 0 = Not Yet Expired)
	Expired	Status of A User Whose Certifications Have Expired. (1 = Expired And 0 = Not Expired)
	ExpireIn30Days	Status of A User Whose Certification Will Expire Within 30 Days. (1 = Expired And 0 = Not Expired)
	ExpireIn60Days	Status of A User Whose Certification Will Expire Within 30 Days. (1 = Expired And 0 = Not Expired)
	ExpireIn90Days	Status of A User Whose Certification Will Expire Within 30 Days. (1 = Expired And 0 = Not Expired)
	IsExpired	Represents if the Certificate Is Expired
	UserId	Expireafter90Days Status of A User Whose Certifications Are
	ValidForDays	Number of Days After Which the Certificate Will Expire

Views_name	column_name	Table and Fields Descriptions
	ValidUntil	Date when the Certificate Will Expire
	WillExpireAfter90Days	Represents when the Certificate Will Expire After 90 Days
	WillExpireIn30Days	Represents when the Certificate Will Expire In 30 Days
	WillExpireIn60Days	Represents when the Certificate Will Expire In 60 Days
	WillExpireIn90Days	Represents when the Certificate Will Expire In 90 Days
CertificateCurriculum_v		Certifications Associated With Curricula.
	Certificate ID	Certificate ID
	Certificate Name	Name of the Certificate Program
	Curriculum ID	Curriculum ID
	Curriculum Name	Curriculum Name
CertificateUserLevel_v		This View Contains Details of Certificate User Level
	Certificate ID	Certificate ID
	Certificate Name	Name of the Certificate Program
	Date Passed	Date User Passed the Certificate
	Date Recertification Start	Date when the Recertification Can Start
	Date ValID Until	Date Certificate Expires
	First Name	Represents First Name of the User
	Is Granted	Represents if Certificate Was Granted To User
	Is Pass	Represents if User Passed
	Last Name	Last Name
	Level ID	Level ID
	Pass	Pass
	User ID	User ID
AnnualComplianceIndividualReport_v		Annual Compliance Individual Report
	Certification Enroll Date	Represents Date Enrolled
	Certification Program ID	Represents Certification Program ID
	Certification Program Name	Represents Certification Program Name
	Compliance Year	Represents Year of Compliance
	Course Date Completed	Date Course Was Completed
	Course ID	Course ID
	Course Name	Course Name
	Employee ID	User ID
	Location	Location
	Requirements Group CompletePercent	Complete Percentage of the Requirements Group

Views_name	column_name	Table and Fields Descriptions
	Requirement Group CourseCompleted	Course Completed of the Requirements Group
	Requirement Group Course Total	Course Total
	Requirement Group ID	Unique ID Assigned To A Requirement Group
	Requirement Group Name	Name of the Group
	Run Date	Run Date
	Supervisor ID	ID of the Supervisor
	Supervisor Name	Name of Supervisor
	Type	Type
	User ID	ID of User
	User Name	Name of User
AnnualComplianceReport_v		This View Contains Details Regarding the Annual Compliance Report.
	CertificationEnrollDate	Represents Date Enrolled
	CertificationProgramId	Represents Certification Program ID
	CertificationProgramName	Represents Certification Program Name
	CertificationResetDate	Certification Reset Date
	CourseComplete	Course Complete
	CourseCount	Number of Courses
	CourseMedium	Course Medium
	Location	Location
	Pct	Percentage
	SupervisorID	ID of the Supervisor
	SupervisorName	Name of Superviso
AnnualComplianceSupervisor_v		Annual Compliance Supervisor Details
	CertificationEnrollDate	Represents Date Enrolled
	CertificationProgramId	Represents Certification Program ID
	CertificationProgramName	Represents Certification Program Name
	CertificationResetDate	Certification Reset Date
	CourseComplete	Course Complete
	CourseCount	Number of Courses
	CourseMedium	Course Medium
	EmployeeName	Location
	Pct	Percentage
	Plant	Plant
	SupervisorID	ID of the Supervisor

Views_name	column_name	Table and Fields Descriptions
	SupervisorName	Name of Superviso
	UserId	ID of User
CertProgramswithLevelsandRequirements_v		Certificate Programs With Level And Requirements.
	CertificationLevelCode	Level Code Assigned To the Program Level
	CertificationLevelID	Unique ID of the Program Level
	CertificationLevelName	Name of the Level Where the Certification Is Located
	CertificationLevelSe-quence	Program Level Sequence Number
	CertificationProgramCode	Overall Program Code Populated By the Administrator
	CertificationProgramID	Unique ID Set For the Program
	CertificationProgramName	Name of the Program
	RequirementCredits	Represents Credits
	RequirementID	ID of the Requirement
	RequirementMandatory	Indicates of the Requirement Is Mandatory
	RequirementName	Name of the Requirement
	RequirementSequence	Requirement Sequence
	RequirementType	Type of the Requirement
	RequirementTypeID	ID of the Requirement Type
CertProgramswithLevelswithReqGroupsandRequire-ments_v		Certificate Programs With Required Groups And Require-ments.
	CertificationLevelCode	Level Code Assigned To the Program Level
	CertificationLevelID	Unique ID of the Program Level
	CertificationLevelIsDefault	Default Displays if the Certification Level Is Default
	CertificationLevelName	Name of the Level Where the Certification Is Located
	CertificationLevelSe-quence	Program Level Sequence Number
	CertificationProgramCode	Overall Program Code Populated By the Administrator
	CertificationProgramID	Unique ID Set For the Program
	CertificationProgramName	Name of the Program
	RequirementCredits	Number of Credits Assigned To the Requirements
	RequirementGroupCode	Code Assigned To the Requirement Group
	RequirementGroupCredits	Credits Assigned To the Requirement Group
	RequirementGroupICCred-its	Credits Assigned To A Requirement Group
	RequirementGroupID	Unique ID Assigned To A Requirement Group
	RequirementGroupIsDe-fault	Displays if the Requirement Group Is Default

Views_name	column_name	Table and Fields Descriptions
	RequirementGroupMandatory	Indicates if Requirement Group Is Mandatory
	RequirementGroupName	Name of the Requirement
	RequirementGroupSequence	Requirement Sequence
	RequirementID	Displays the Unique ID of Requirement
	RequirementMandatory	Displays if the Requirement Group Is Mandatory
	RequirementName	Name of the Requirement
	RequirementSequence	Requirement Sequence
	RequirementType	Type of the Requirement
	RequirementTypeID	ID of the Requirement Type
CertProgramswithRequirementGroupsandRequirements_v		Certificate Programs With Requirement Groups And Requirements.
	CertificationProgramCode	Overall Program Code Populated By the Administrator
	CertificationProgramID	Unique ID Set For the Program
	CertificationProgramName	Name of the Program
	RequirementCredits	Number of Credits Assigned To the Requirements
	RequirementGroupCode	Code Assigned To the Requirement Group
	RequirementGroupCredits	Credits Assigned To the Requirement Group
	RequirementGroupICCredits	Credits Assigned To A Requirement Group
	RequirementGroupID	Unique ID Assigned To A Requirement Group
	RequirementGroupMandatory	Indicates if Requirement Group Is Mandatory
	RequirementGroupName	Name of the Requirement
	RequirementGroupOptional	Indicates if Requirement Group Is Optional
	RequirementGroupSequence	Requirement Sequence
	RequirementID	ID of the Requirement
	RequirementMandatory	Displays if the Requirement Group Is Mandatory
	RequirementName	Name of the Requirement
	RequirementSequence	Requirement Sequence
	RequirementType	Type of the Requirement
	RequirementTypeID	ID of the Requirement Type
CertProgramswithRequirements_v		Certificate Programs With Requirements.
	CertificationProgramCode	Overall Program Code Populated By the Administrator
	CertificationProgramID	Unique ID Set For the Program

Views_name	column_name	Table and Fields Descriptions
	CertificationProgramName	Name of the Program
	RequirementID	ID of the Requirement
	RequirementMandatory	Displays if the Requirement Is Mandatory
	RequirementName	Name of the Requirement
	RequirementSequence	Requirement Sequence
	RequirementType	Type of the Requirement
	RequirementTypeID	ID of the Requirement Type
CertProgramUserStatus_v		Certification Program User Status
	CertificationLevelCode	Code of Certification Level
	CertificationLevelCompletionDate	Completion Date of Certification
	CertificationLevelEnrolledBy	Certification Level Enrolled By
	CertificationLevelEnrolledDate	Certification Level Enrolled Date
	CertificationLevelID	Certificate Level ID
	CertificationLevelName	Name of the Certification Level
	CertificationLevelSequence	Sequence of the Certification Level
	CertificationLevelUserStatus	User Status of the Certification Level
	CertificationProgramCode	Overall Program Code Populated By the Administrator
	CertificationProgramCompletionDate	Completion Date of Certification Program
	CertificationProgramEnrolledBy	Certification Program Enrolled By
	CertificationProgramEnrolledDate	Certification Program Enrolled Date
	CertificationProgramID	Unique ID Set For the Program
	CertificationProgramName	Program Name
	CertificationProgramUserStatus	User Status of the Certification Level
	OverdueDays	Overdue Days
	RequirementCompletionDate	Completion Date of Requirements
	RequirementCredits	Requirement Credits
	RequirementEnrolledBy	Requirements Enrolled By
	RequirementEnrolledDate	Requirements Enrolled Date
	RequirementGroupCode	Requirement Group Code

Views_name	column_name	Table and Fields Descriptions
	RequirementGroupCompletedDate	Requirement Completed Date
	RequirementGroupCompletionDeadline	Requirement Completion Deadline
	RequirementGroupCredits	Requirement Group Credits
	RequirementGroupEnrolledBy	Requirements Group Enrolled By
	RequirementGroupEnrolledDate	Requirements Group Enrolled Date
	RequirementGroupExpireDate	Requirements Group Expire Date
	RequirementGroupICCredits	Requirements Group Ic Credits
	RequirementGroupID	ID of the Requirement Group
	RequirementGroupMandatory	Displays if the Requirement Is Mandatory
	RequirementGroupName	Name of the Requirement Group
	RequirementGroupOptional	Indicates if Requirement Group Is Optional
	RequirementGroupSequence	Requirement Sequence For the Requirement Group
	RequirementGroupStage	Stage For the Requirement Group
	RequirementGroupUserStatus	Course Status With Respect To the User (Passed, Failed Or Undetermined)
	RequirementID	ID of the Requirement
	RequirementMandatory	Displays if the Requirement Is Mandatory
	RequirementName	Name of the Requirement
	RequirementSequence	Requirement Sequence
	RequirementStage	Stage For the Requirement
	RequirementType	Type of the Requirement
	RequirementTypeID	ID of the Requirement Type
	RequirementUserStatus	Course Status With Respect To the User (Passed, Failed Or Undetermined)
	UserID	User ID
SupervisorTeamQualificationBookReport_v		Book Report For Supervisor Team Qualifications
	CertificationEnrollDate	Date when Enrolled To Certification
	CertificationProgramId	ID of the Certification Program
	CertificationProgramName	Name of the Certification Program
	CertificationResetDate	Date when Certification Is Reset
	CourseComplete	Indicates if Course Is Completed

Views_name	column_name	Table and Fields Descriptions
	CourseCompletedPeriod	Indicates the Completed Period
	CourseCount	Number of Courses Completed In Certification Program
	CourseDateCompleted	Date when Course Is Completed
	EmployeeID	ID of the Employee
	Location	Location
	Pct	Percentage
	RunDate	Run Date
	SupervisorID	ID of the Supervisor
	SupervisorName	Name of the Supervisor
	TimePeriod	Time Period
	UserId	User ID
	UserName	Users Username
spAnnualComplianceReport (SP)		Annual Compliance Report For Store Procedures.
	Certification Program Name (Param)	Name of the Certification Program
	Course Medium	Course Medium
	Date Enroll From (Param)	Date Enrolled From
	Date Enroll To (Param)	Date Enrolled To
	Date Reset From (Param)	Date Reset From
	Date Reset To (Param)	Date Reset To
	Location	Location
	Location (Param)	Location
	Pct%	Percentage
	Run Date	Run Date
	Supervisor ID	ID of the Supervisor
	Supervisor Name	Name of the Supervisor
	Total Completed	Total Completed
	Total Required	Total Required
spAnnualComplianceSupervisor (SP)		Annual Compliance Supervisor For Store Procedures.
	Certification Program Name (Param)	Name of the Certification Program
	Course Medium	Course Medium
	Current Date	Current Date
	Date From (Param)	Date From
	Date Reset From (Param)	Date Reset From
	Date Reset To (Param)	Date Reset To

Views_name	column_name	Table and Fields Descriptions
	Date To (Param)	Date To
	Employee Name	Name of the Employee
	Location (Param)	Location
	Supervisor ID	ID of the Supervisor
	Supervisor ID (Param)	ID of the Supervisor
	Supervisor Name	Name of the Supervisor
	Total Completed	Total Completed
	Total Required	Total Required
	User ID	User ID

Courses

Views_name	column_name	Table and Fields Descriptions
Course_v		Course Details
	Audience	Describes the audience of the course
	CourseId	Course ID
	CourseName	Course name
	CreatedBy	Login name of the user who created the record
	CreatedByUserId	User ID of the user who created the record
	Credits	Course credit value
	DateCreated	Record creation date
	DateLastPublished	Last published date
	Description	Course description
	IsActive	Indicates if the course is active
	ModificationDate	Date when the field was modified
	Objectives	List the objectives of the course
	ShortName	Course short name
	UniqueCourseId	Course Unique ID
	UpdatedBy	Login name of the user who modified the record
	UpdatedByUserId	Modified by (user ID)
CourseLevel_v		Course Location in the Hierarchy
	Branch	Name of the parent level 2 field for any level. For Level 2 fields, it contains "System".
	CourseId	Course ID
	CourseName	Course name
	i_eventcourse_key	Event course key
	i_levelid_2	Level 2 ID
	i_levels_id	ID of the level where the course is located
	IsDefault	Indicates if the course is the default course on the level
	LevelName	Level name
	LevelNode	Level tier

Views_name	column_name	Table and Fields Descriptions
CoursePage_v		Specific Course Page Details
	#ofQuestionsPooled	Number of pooled questions
	Answer	Answer selected by the user
	Assessment	Assessment type
	Audience	Audience
	CourseId	Course ID
	CourseName	Course name
	CoursePassingScore	Course passing score
	Description	Description
	EnvironmentId	Environment ID
	Envname	Environment name
	Feedback	Feedback
	Interactiontype	Interaction type
	IsActive	Indicates if the course is active
	IsCourseAggregate	Indicates if the page counts towards the course aggregate score
	IsPooled	Indicates if the page is pooled
	IsRoadMapModule	Indicates if the page is a part of the course completion rules
	ModName	Module name
	ModPassingScore	Module passing score
	ModuleId	Module ID
	Objectives	Course objectives
	Orderno	Order number
	Pageid	Page ID
	PageName	Page name
	QuestionWeight	Question weight
	ShortName	Course short name
	StandardName	Course standard name
	UniqueCourseId	Course unique ID
CoursePrerequisite_v		Course Prerequisite Details
	CourseId	Course ID
	CourseName	Course name
	LevelId	Level ID where the course is located
	LevelName	Level name
	Prerequisite	Prerequisite course
	PrerequisiteId	Prerequisite course ID

Views_name	column_name	Table and Fields Descriptions
CourseUser_v		Course User Details
	CourseId	Course ID
	CourseName	Course name
	CourseStatus	Course status
	FirstName	First name
	LastName	Last name
	ResetDate	Course reset date (January 1, 1900 if never reset)
	UserId	User ID
CourseUserStatus_v		User Course Status Details
	CourseId	Course unique ID
	CourseName	Course name
	Equivalent_Course_Name	Equivalent course name
	FirstName	First name
	LastName	Last name
	LastSessionDate	Last session date
	TotalDuration	Total duration in seconds
	TotalSessions	Number of sessions started by user
	UserId	User ID
	UserStatus	Course status with respect to the user
CourseUserNoEvent_v		Users enrolled in courses but not assigned to events
	CourseId	Course ID
	CourseName	Course name
	FirstName	First name
	LastName	Last name
	ResetDate	Reset Date Course reset date (January 1, 1900 if never reset)
	UserId	User ID
CourseChargeback_v		Course Billing
	BillingMethod	Billing method
	ChargbackId	Chargeback ID
	ChargebackAmount	amount of the chargeback
	CourseId	Course ID
	CourseName	Course name
	LevelId	Level ID
	LevelName	Level name
Coursecustomfield_v		Course Custom Fields

Views_name	column_name	Table and Fields Descriptions
	CourseId	Course ID
	CourseName	Course name
	CustomfieldLevelName	Custom field name level
	FieldName	Field name
	FieldValue	Field value
	LevelCreatedAt	Level for which the competency was created
	LevelId	Level ID
	LevelName	Level name
CourseCustomFieldAllCourses_v		Custom field names and values for all courses.
	CourseId	Course ID
	CourseName	Course name
	CustomfieldLevelName	Custom field level name
	FieldName	Field name
	FieldValue	Field value
	i_eventcourse_key	event course key
	LevelCreatedAt	Level for which the competency was created
	LevelId	Level ID
	LevelId	Level Name Level name
CourseUsageReport_eLearning_v		Course usage for e-learning sessions.
	Average Time Online Min	Average time online in minutes
	Average Time Online Sec	Average time online in seconds
	CourseName	Course name
	Sessions between 8:00AM and 10:00PM Yesterday	Sessions between 8 and 10 yesterday
	Total Sessions	Total number of sessions
	Total Sessions in Last 24hr	Total number of sessions in the last 24 hours
CourseUsageReport_eLearningDetail_v		Course usage details
	After 8:00AM PST Yester-day	Usage after 8 am PST yesterday
	CourseName	Course name
	dt_timein	Time
	dt_timein HMS	Time in HH:MM:SS
	Duration	Course duration
	FirstName	First name
	LastName	Last name

Views_name	column_name	Table and Fields Descriptions
	loginname	login name of the user
	Logins between 8:00 - 10:00 PST Yesterday	Represents logins between 8 - 10 yesterday
	session in last 24 hrs	Total number of sessions in the last 24 hours
	SysDtTemp	Today's date in date time format
	todays date	Today's date
Purchase_v		User Purchasing details
	AuthorizationCode	Authorization code
	CardNumber	Card number
	CardType	Card type
	CcardCity	City
	CcardFirstname	First name
	CcardLastname	Last name
	CcardState	State
	CcardStreetAddress	Street address
	CcardStreetAddress2	Street address 2
	CcardZip	Zip code
	Country	Country
	CouponCode	Coupon code
	CouponType	Coupon type
	Currency	Currency
	Discount	Discount percentage
	Firstname	First name
	i_related_purchase_id	ID of related purchase
	ItemDescription	Item description
	ItemId	Item ID
	ItemName	Item name
	ItemType	Item type
	Lastname	Last name
	Phone	Phone number
	PortalName	Portal name
	Price	Item price
	PurchaseDate	Purchase date
	PurchaseId	Purchase ID
	SubTotal	Purchase subtotal
	Total	Purchase Total

Views_name	column_name	Table and Fields Descriptions
	TransactionDate	Transaction date
	TransactionType	Transaction type
	UserId	User ID
UserCourseScore_v		User Course Scores
	AssessmentName	Assessment name
	CourseID	Course ID
	CourseName	Course name
	DateScored	Date when the user took the test
	Equivalent_Course_Name	Equivalent course name
	Firstname	First name
	LastName	Last name
	Score	Course score
	UserId	User ID
	UserStatus	Course status with respect to the user (Passed, failed or undetermined)
	vch_equivalent_course_id	Equivalent course ID
spClassroomSessionsFollowUpByParticipantAndCourse (SP)		Session followup by participants and courses
	Country	Country
	Course ID (Param)	GUID
	Course Name	Course name
	Course Name (Param)	Course name
	Credit Received	Credit received
	Division	Division
	Domain	Domain
	Entity	Entity
	Job	Job
	Participant Name	Participant name
	Seniority in Job	Job seniority
	Session Date	Session date
	Status	Status
	User ID (Param)	User GUID
spLevelCourseStat (SP)		Level course statistics
	Scored date	Date scored
	User count	User count
	Total session	Total sessions

Views_name	column_name	Table and Fields Descriptions
	Test count	Test count
spOjtSessionsFollowUpByParticipantAndCourse (SP)		OJT session followup by participants and courses
	Country	Country
	courseId(Param)	Course ID
	CourseName	Course name
	courseName(Param)	Course name
	CurriculumScheduleID	Curriculum schedule ID
	Division	Division
	Domain	Domain
	Entity	Entity
	Files Uploaded	Uploaded files
	Job	Job
	ParticipantName	Participant name
	Score	Score
	Seniority in Job	Job seniority
	Status	Status
	userId(Param)	User ID
spOnlineSessionsFollowUpByParticipantAndCourse (SP)		Online session followup by participants and courses
	AnswerProvided	Provided answer
	Country	Country
	courseId(Param)	Course ID
	CourseName	Course name
	courseName(Param)	Course name
	Division	Division
	Domain	Domain
	Entity	Entity
	Job	Job
	LastConnection	Indicates if session is last connection
	ParticipantName	Participant name
	Question	Question
	QuestionWeight	Question weight
	Score Pts	Score points
	Seniority in Job	Job seniority
	SessionDuration	Session Duration
	Status	Status

Views_name	column_name	Table and Fields Descriptions
	userId(Param)	User ID
spPurchaseGetByUserIdCourseID (SP)		Purchases by users and courses
	courseId(Param)	Course ID
	CourseName	Course name
	CurrencySymbol	Currency symbol
	endDate(Param)	End date
	EventName	Event name
	FirstName	First name
	LastName	Last name
	Price	Price
	PurchaseDate	Puchase date
	PurchaseId	Transaction ID
	startDate(Param)	Start date
	UserId	User ID
	userId(Param)	User ID
spUserCourseEnrolled (SP)		Users who are enrolled in courses
	b_level_course_filter	Filters level course
	b_level_user_filter	Filters level user
	dt_enddate(Param)	End date
	dt_startdate(Param)	Start date
	i_manager_id(Param)	Manager ID
	peer_group	Peer group
	registered_date	Registration date
	totalEnrolled	Total enrolled users
	totalUsers	Total users
	vch_course_id(Param)	Course ID
	vch_levels(Param)	Levels
	vch_users(Param)	Users
spUsersCoursesTaken (SP)		Courses taken by users
	b_level_course_filter	Filters level course
	b_level_user_filter	Filters level user
	credits_earned	credits earned
	dt_enddate(Param)	End date
	dt_startdate(Param)	Start date
	i_manager_id(Param)	Manager ID

Views_name	column_name	Table and Fields Descriptions
	peer_group	Peer group
	scored_date	Date scored
	user_score	User score
	users_passed_course	Passing score
	users_passed_course_ra-tio	Passing score ratio
	vch_course_id(Param)	Course ID
	vch_levels(Param)	Levels
	vch_users(Param)	Users
CourseAttributesLocalizedHistory_v		History of localized course attributes
	Audience	Audience
	CourseId	Course ID
	CourseName	Course name
	Description	Description
	LCID	Localization ID
	ModificationDate	Date modified
	Objectives	Objectives
	ShortName	Short name
	UpdatedBy	Modified by
	UpdatedByUserId	Modified by (user ID)
CourseCommonFieldHistory_v		History of course common fields
	CourseId	Course ID
	CFID	Common field ID
	CFName	Common field name
	CFValue	Common field value
	ModificationDate	Date modified
	DateCreated	Created on
	CreatedBy	Created by
	CreatedByUserId	Created by (user ID)
	UpdatedBy	Modified by
	UpdatedByUserId	Modified by (user ID)
	IsDeleted	Indicates if common field is deleted
CourseCustomFieldHistory_v		Custom fields associated with a course
	CourseId	Course ID
	CustomFieldId	Custom field ID
	CustomFieldName	Custom field name

Views_name	column_name	Table and Fields Descriptions
	CustomFieldValue	Custom field value
	LevelId	Level ID
	ModificationDate	Date modified
	DateCreated	Created on
	CreatedBy	Created by
	CreatedByUserId	Created by (user ID)
	UpdatedBy	Modified by
	UpdatedByUserId	Modified by (user ID)
	IsDeleted	Indicates if common field is deleted
	IsSystemWide	Indicates if common field is system wide
CourseLevelHistory_v		Course level history
	LevelId	Level ID
	CourseId	Course ID
	Default	Default
	ParentDefault	Default parent level
	CreditCode	Credit code
	CreditAmount	Credit amount
	DateCreated	Created on
	ModificationDate	Date modified
	NewEventFlag	Indicates if there's a new event
	IsDeleted	Indicates if course is deleted
	UpdatedBy	Modified by
	UpdatedByUserId	Modified by (user ID)
	CreatedBy	Created by
	CreatedByUserId	Created by (user ID)
	AutoDistribute	Indicates if course is auto distributed
CourseManager_v		Assigned manager for each course
	CourseManagerId	Course manager ID
	ManagerFName	Manager first name
	ManagerLName	Manager last name
	UserId	Manager user ID
	CourseId	Course ID
	CourseName	Course name
CoursesCFEntityValue_v		CF Entity values for courses
	CF_ID	Common field ID

Views_name	column_name	Table and Fields Descriptions
	CF_Name	Common field name
	CourseID	Course ID
	CourseName	Course name
	ShortName	Course short name
	IsActive	Indicates if course common field is active
	CourseType	Course type
	CF_Value	Common field value
	IsMandatory	Indicates if mandatory
	IsEnabled	Indicates if enabled
CourseSession_v		Duration of each session of each user log in
	CourseId	Course ID
	CourseName	Course name
	Duration	Course duration
	DurationHMS	Course duration in hours, minutes, and seconds
	FirstName	First name
	LastName	Last name
	SessionStart	Session start
	UserId	User ID
CourseSessionSummary_v		Average duration of each session of each user log in
	AverageSessionDuration	Average session duration
	AverageSessionDura-tionHMS	Average session duration in hours, minutes, and seconds
	CourseId	Course ID
	CourseName	Course name
	EnrolledUserCount	Enrolled user count
	MaximumSessionDuration	Maximum session duration
	MaximumSessionDura-tionHMS	Maximum session duration in hours, minites, and seconds
	MinimumSessionDuration	Minimum session duration
	MinimumSessionDura-tionHMS	Minimum session duration in hours, miniutes, and seconds
	NoSessionUserCount	Users with no sessions count
	SessionUserCount	Session user count
Dependent_Courses_v		Course equivalents
	Course_Name	Course name
	Depen-dent_Course_Name	Dependent course name

Views_name	column_name	Table and Fields Descriptions
ExternalTestscoreHistory_v		
	AssesmentType	Assessment type
	Comment	Comment
	CreatedBy	Created by
	CreatedByUserId	Created by (user ID)
	DateCreated	Created on
	DateModified	Date modified
	DateScored	Date scored
	ExternalTestID	External test ID
	FirstName	First name
	IsDeleted	Indicates if record is deleted
	LastName	Last name
	Score	Score
	Status	Status
	UpdatedBy	Modified by
	UpdatedByUserId	Modified by (user ID)
	UserID	User ID
***Customized report**		
spClassroomSessionsFollowUpByParticipantAndCourse		
	Country	Country
	Course ID (Param)	GUID
	Course Name	Course name
	Course Name (Param)	Course name
	Credit Received	Credit received
	Division	Division
	Domain	Domain
	Entity	Entity
	Job	Job
	Participant Name	Participant name
	Seniority in Job	Job seniority
	Session Date	Session date
	Status	Status
	User ID (Param)	User GUID

Credits

Views_name	column_name	Table and Fields Descriptions
CECreditCourse_v		CE Credits That Are Associated with Courses
	CECreditValidFromDate	Start Date of Validity Period
	CECreditValidToDate	End Date of Validity Period
	CECreditValue	Credit Value
	CEProviderDescription	Describes the CE Provider
	CEProviderId	Provider ID
	CEProviderIMSId	Provider MS ID
	CEProviderIsActive	Indicates if the CE Provider Is Active
	CEProviderTitle	Title of the CE Provider
	CourseId	Course ID
	CourseName	Course Name
	LevelID	Level ID of the CE Credit
	LevelName	Level Name
CECreditUser_v		CE Credits Granted To Users
	CECreditEarned	Earned CE Credits By User
	CECreditEarnedDate	Date when CE Credits Was Earned
	CECreditExpired	Indicates if CE Credits Was Expired
	CECreditExpireDate	Expiration Date of CE Credits
	CEProviderDescription	Describes the CE Provider
	CEProviderId	Provider ID
	CEProviderIMSId	Provider MS ID
	CEProviderIsActive	Indicates if the CE Provider Is Active
	CEProviderTitle	Indicates if the CE Provider Is Active
	CourseId	Title of the CE Provider
	CourseName	Course name
	FirstName	First name
	LastName	Last name
	UserId	User ID

Views_name	column_name	Table and Fields Descriptions
OutsideCredit_v		Outside Credits Details
	CreditsEarned	Earned Outside Credits By User
	DateCompleted	Date of Completion
	DateResolved	Date Resolved
	DateSubmitted	Submitted Date of Outside Credits
	ExpirationDate	Expiration Date of Outside Credits
	Hours	Hours Completed
	IsExpired	Indicates if Outside Credit Is Expired
	IsLatestStatus	Indicates if the Status Is the Latest
	IsPassed	Indicates if Credits Was Passed
	OutsideCreditID	ID of the Outside Credit
	ResolutionComment	Comment of the Approver
	ResolvedBy	Approver of the Submitted Outside Credits
	Score	Outside Credit Score
	Status	Outside Credit Status
	StatusID	Status ID
	Title	Title of Outside Credit
	TypeDescription	Describes the Outside Credit Type
	TypeID	Type ID of the Outside Credit
	TypeImsID	Type Ims ID
	TypeName	Name of the Outside Credit Type
	UserId	User ID

Curricula

Views_name	column_name	Table and Fields Descriptions
Curriculum_v		Curriculum Information Details
	CurDescription	Describes the Curriculum
	CurriculumCredits	Number of Credits Assigned To the Curriculum
	CurriculumId	Curriculum ID
	CurriculumName	Curriculum Name
	IsCcrActive	Indicates if the Course Completion Rule (Ccr) Is Active
CurriculumCourse_v		Courses Assigned To A Curriculum.
	Area	Area
	CourseId	Course ID
	CourseName	Course Name
	Credits	Number of Credits Assigned
	CreditType	Type of Credit Type
	CurriculumCredits	Number of Credits Assigned To the Curriculum
	CurriculumId	Curriculum ID
	CurriculumName	Curriculum Name
	Description1	Represent the Description 1
	Description2	Represent the Description 2
	Description3	Represent the Description 3
	Description4	Represent the Description 4
	Description5	Represent the Description 5
	Description6	Represent the Description 6
	DurationDays	Duration In Days
	DurationHours	Duration In Hours
	Hours	Hours
	IMSCurriculumnID	IMS Curriculum ID
	IsCcrActive	Indicates if the Course Completion Rule (Ccr) Is Active
	Mandatory	Indicates of Course Is Mandatory
	Order	Order

Views_name	column_name	Table and Fields Descriptions
	ParentIMSCurriculumID	Parent Ims Curriculum ID
	Status	Status
	vch_offershort	offershort
CurriculumLevel_v		Curriculum Location in the Hierarchy
	Branch	Name of the Parent Level-2 Where the Event Is Located. if A Level 2 Field Is the Lowest Level For the Event, then This Field Contains "System"
	CurriculumId	Curriculum ID
	CurriculumName	Curriculum Name
	i_levelid_2	ID 2 of the Level Where the Curriculum Is Located
	i_levels_id	Level ID Where the Curriculum Is Located
	IsDefault	Indicates if It Is the Default Curriculum
	LevelName	Name of the Level Where the Curriculum Is Located
	LevelNode	Level Tier (System Is 1) Where the Course Is Located
CurriculumUser_v		Users Assigned To A Curriculum
	CurriculumId	Curriculum ID
	CurriculumName	Curriculum Name
	DateCurriculumCompleted	Date when the Curriculum Is Completed
	Enrolled	Indicates if User Is Enrolled
	FirstName	First Name
	LastName	Last Name
	NotPassed	Indicates if User Did Not Pass
	Passed	Indicates if User Passed the Curriculum
	UserCurriculumStatus	User Status
	UserId	User ID
CurriculumSchedule_v		Curricula Schedule Details
	CreatedDate	Creation Date
	CurriculumId	Curriculum ID
	CurriculumScheduleId	Curriculum Schedule ID
	CurriculumScheduleName	Curriculum Schedule Name
	Description1	Description 1
	Description2	Description 2
	Description3	Description 3
	Description4	Description 4
	Description5	Description 5
	Description6	Description 6

Views_name	column_name	Table and Fields Descriptions
	DurationDays	Duration Days
	DurationHours	Duration Hours
	IMSCurriculumScheduleId	Ims Curriculum Scheduled ID
	InHours	In Hours
	Language	Language
	Location	Location
	ModifiedDate	Modified Date
CurriculumScheduleUsersStatus_v		User Enrollment Status For A Curricula Schedule.
	CancelDate	Cancellation Date
	CancelReasonID	Reason of Cancellation
	CurriculumScheduleId	Curriculum Schedule ID
	CurriculumScheduleName	Name of the Curriculum Schedule
	DateRegistered	Registration Date To Curriculum
	FirstName	First Name
	IsCancelled	Indicates if Schedule Is Cancelled
	IsEnrolled	Indicates if User Is Enrolled
	LastName	Last Name
	UserId	User ID
CurriculumScheduleLevel_v		Location of Curricula Schedules In the Hierarchy And Its Enrollment Settings.
	Active	Represents if the Curriculum Is Active
	Branch	Name of the Parent Level-2 Where the Event Is Located. if A Level 2 Field Is the Lowest Level For the Event, then This Field Contains "System"
	CancelTemplate	Cancel Template
	CreatedDate	Created Date
	CurriculumId	Curriculum ID
	CurriculumScheduleId	Curriculum Schedule ID
	CurriculumSched-uleLevelId	Curriculum Schedule Level ID
	CurriculumScheduleName	Curriculum Schedule Name
	Description1	Description 1
	Description2	Description 2
	Description3	Description 3
	Description4	Description 4
	Description5	Description 5
	Description6	Description 6

Views_name	column_name	Table and Fields Descriptions
	DurationDays	Duration Days
	DurationHours	Duration Hours
	EnrollTemplate	Enroll Template
	i_levelid_2	Level ID
	IMSCurriculumScheduleId	Ims Curriculum Scheduled ID
	InHours	In Hours
	Language	Language
	LevelId	ID Level
	LevelName	Name of the Level Where the Course Is Located
	LevelNode	Level Tier (System Is 1) Where the Course Is Located
	Location	Location
	ModifiedDate	Modified Date
	SelfCancellation	Self-Cancellation
	SelfRegistration	Self-Registration
CurriculumScheduleCourse_v		Curricula Schedule Details by Course
	CourseId	Course ID
	CourseName	Course Name
	CurriculumScheduleCour-seId	Curriculum Schedule Course ID
	CurriculumScheduleId	Curriculum Schedule ID
	CurriculumScheduleName	Curriculum Schedule Name
	EventID	Event ID
	EventName	Event Name
	HasPrerequisite	Prerequisite
	Included	Included
	IOrder	Iorder
Curriculum_CurriculumSchedule_Level_v		Curriculum Schedule Details by Level
	CourseName	Course Name
	CurriculumId	Curriculum ID
	CurriculumName	Curriculum Name
	CurriculumScheduleId	Curriculum Schedule ID
	CurriculumScheduleName	Curriculum Schedule Name
	EventEndDate	Event End Date
	EventName	Event Name
	EventStartDate	Event Start Date
	LevelID	ID Level

Views_name	column_name	Table and Fields Descriptions
	LevelName10	Level Name 10
	LevelName11	Level Name 11
	LevelName12	Level Name 12
	LevelName2	Level Name 2
	LevelName3	Level Name 3
	LevelName4	Level Name 4
	LevelName5	Level Name 5
	LevelName6	Level Name 6
	LevelName7	Level Name 7
	LevelName8	Level Name 8
	LevelName9	Level Name 9
Curriculum_CurriculumSchedule_AdminLevel_v		Curriculum Schedule Details by Admin Level
	CourseName	Course Name
	CurriculumId	Curriculum ID
	CurriculumName	Curriculum Name
	CurriculumScheduleId	Curriculum Schedule ID
	CurriculumScheduleName	Curriculum Schedule Name
	EventEndDate	Event End Date
	EventName	Event Name
	EventStartDate	Event Start Date
	LevelID	Level ID
	LevelName10	Level Name 10
	LevelName11	Level Name 11
	LevelName12	Level Name 12
	LevelName2	Level Name 2
	LevelName3	Level Name 3
	LevelName4	Level Name 4
	LevelName5	Level Name 5
	LevelName6	Level Name 6
	LevelName7	Level Name 7
	LevelName8	Level Name 8
	LevelName9	Level Name 9
	ManagerUser	Manager User
Curriculumcustomfield_v		Curriculum Custom Fields
	CurriculumId	Curriculum ID

Views_name	column_name	Table and Fields Descriptions
	CurriculumName	Curriculum Name
	CustomfieldLevelName	Custom Field Level Name
	FieldName	Field Name
	FieldValue	Field Value
	LevelCreatedAt	Level For Which the Competency Was Created
	LevelId	Level ID
	LevelName	Name of the Level Where the Curriculum Is Located
spCurriculumScheduleSynthesis (SP)		Curriculum Schedule Synthesis
	Country	Country
	Course ID	Course ID
	Course Name	Course Name
	Curriculum ID (Param)	Curriculum ID
	Curriculum Schedule ID	Curriculum Schedule ID
	Curriculum Schedule ID (Param)	Curriculum Schedule ID (Param)
	Curriculum Schedule Name	Curriculum Schedule Name
	Division	Division
	Domain	Domain
	Entity	Entity
	First Name	First Name
	i_levels_ID (Param)	Level ID Where the Curriculum Is Located
	In Class	Indicates if in Class
	Job	Job
	Last Name	Last Name
	OJT Assignment	On the Job Training Assignment
	Online	Represents if User Is Online
	Participant Name	Participant Name
	Seniority in Job R	Job Seniority
	User ID	User ID
CurriculumUserCompletionByDistributionGroups_v		User Curriculum Completion By Distribution Group
	CompletedCurriculum-Credits	Completed Curriculum Credits
	CompletionDeadline	Deadline of Completion
	CurriculumCompletePer-centage	Percentage
	CurriculumDescription	Describes the Curriculum

Views_name	column_name	Table and Fields Descriptions
	CurriculumId	Curriculum ID
	CurriculumName	Curriculum Name
	DateCurriculumCompleted	Custom Field Name Level
	DateRegistered	Field Name
	DaysOverdue	Field Value
	DistributionGroupCreated	Indicates if A Distribution Group Is Created
	DistributionGroupDescrip-tion	Describes the Distribution Group
	DistributionGroupID	ID of the Distribution Group
	DistributionGroupIsActive	Indicates if Distribution Group Is Active
	DistributionGroupModified	Indicates if Distribution Group Is Modified
	DistributionGroupName	Name of the Distribution Group
	Enrolled	Indicates if User Already Enrolled
	LevelID	Level ID
	LevelName	Name of the Level Where the Curriculum Is Located
	LevelNode	Node of the Level
	NotPassed	Indicates if Curriculum Is Not Passed
	Passed	Indicates if Curriculum Is Passed
	TotalCurriculumCredits	Total Credits
	UserCurriculumStatus	Status
	UserEmail	Email
	UserFirstName	First Name
	UserId	User ID
	UserLastName	Last Name

Events

Views_name	column_name	Table and Fields Descriptions
Event_v		Event Details
	Audience	Audience
	CancellationFee	Cancellation Fee
	CourseId	Course ID
	CourseName	Course Name
	CreatedBy	Created By
	CreatedByUserId	Created By (User ID)
	Credits	Course Credits
	DateChargeCancellation-FeeFrom	Cancellation Fee Charge Date
	DateClassroomEnd	Classroom Event End Date
	DateClassroomStart	Classroom Event Start Date
	DateCreated	Created On
	DateEvaluationEnd	Evaluation End Date
	DateEvaluationStart	Evaluation Start Date
	DateEventCancelled	Event Cancellation Date
	DateEventEnd	End Date of the Event
	DateEventStart	Event Start Date
	DateOnlineEnd	Online Event End Date
	DateOnlineStart	Online Event Start Date
	DateRegEnd	Event Registration End Date
	DateRegStart	Event Registration Start Date
	DateSelfCancelEnd	Event Self-Cancellation End Date
	DateVLSEnd	VLS Event End Date
	DateVLSStart	VLS Event Start Date
	Description	Description
	EventId	Event ID
	EventName	Event Name

Views_name	column_name	Table and Fields Descriptions
	EventType	Event Type
	ExternalTestId	External Test ID
	ExternalTestName	External Test Name
	ExternalTestPassingScore	External Test Passing Score
	IsActive	Indicates if the Course Is Active
	IsCancelled	Indicates if the Event Is Cancelled
	MaxEnrollment	Maximum Enrollment
	MinEnrollment	Minimum Enrollment
	ModificationDate	Date Modified
	Notes	Notes
	Objectives	Course Objectives
	ShortName	Course Short Name
	UniqueCourseId	Course Unique ID
	UpdatedBy	Modified By the Record
	UpdatedByUserId	Modified By (User ID)
EventEnrollment_v		User Course Enrollment Details
	Cancelled	Indicates if the User is Cancelled From the Event (0=No, 1=Yes)
	CourseId	Course ID
	CourseName	Course Name
	DateCancelled	Cancelation Fee Charge Date
	DateRegistered	Registration Date
	DateWaitlisted	Waitlist Date
	Enrolled	Indicates if User Is Enrolled (1=Yes, 0=No)
	EventId	Event ID
	EventName	Event Name
	FirstName	First Name
	IsCancelled	Indicates if the Event is Cancelled (Yes=True,
	IsEnrolled	Indicates if the User Is Enrolled (Yes=True, No=False)
	IsSelfCancelled	Indicates if the User Has Self-Cancelled (Yes=True,
	IsWaitlisted	Indicates if the User Is On Waitlist (Yes=True, No=False)
	LastName	Last Name
	SelfCancelled	Indicates if the User Is Self-Cancelled
	UserId	User ID Assigned To the Event
	Waitlisted	Indicates if the Event Has Waitlisted Users (1=Yes, 0=No)
	WaitNumber	Waitlist Number

Views_name	column_name	Table and Fields Descriptions
EventEnrollmentSummary_v		Summary of User Enrollment For Courses.
	CancelledUserCount	Canceled User Count
	CourseId	Course ID
	CourseName	Course Name
	EnrolledUserCount	Enrolled User Count
	EventId	Event ID
	EventName	Event Name
	WaitlistedUserCount	Waitlist User Count
EventEnrollmentSummaryByUser_v		Enrollment Summary For Each User.
	Cancelled	Indicates if the User is Cancelled From the Event (0=No, 1=Yes)
	CourseId	Course ID
	CourseName	Course Name
	CourseStatus	Course Status
	CourseUser	Indicates if the Corresponding User Is Associated With the Course (1=Yes, 0=No)
	Enrolled	Indicates if User Is Enrolled (1=Yes, 0=No)
	Equivalent_Course_Name	Equivalent Course Name
	EventId	Event ID
	EventName	Event Name
	FirstName	First Name
	LastName	Last Name
	SelfCancelled	Indicates if the User Is Self-Cancelled
	UserId	User ID Assigned To the Event
	Waitlisted	Indicates if the Event Has Waitlisted Users (1=Yes, 0=No)
EventLevel_v		Course Event Location in the Level Hierarchy.
	ApprovalRequired	Indicates of the Event Requires Approval
	Branch	Name of the Parent Level-2 Where the Event Is Located. if A Level 2 Field Is the Lowest Level For the Event, then This Field Contains "System"
	CancellationFee	Cancellation Fee
	Currency	Currency
	Default	Indicates if This Is the Default Event
	EventId	Event Unique ID
	EventName	Event Name
	i_eventcourse_key	Event Key
	i_levelid_2	Level ID 2

Views_name	column_name	Table and Fields Descriptions
	i_levels_id	Level ID
	LevelName	Level Name
	LevelNode	Event Level Tier (System Is 1, Level 2 Is 2, Etc.)
	ParentDefault	Indicates if This Is A Parent'S Default Level
	Price	Price of the Event
	SelfCancelAllowed	Indicates if Self Cancellation Is Allowed
	SelfRegAllowed	Indicates if Self Registration Is Allowed
EventCost_v		Event Cost Details
	ActualCost	Actual Cost of the Event
	Currency	Currency
	EstimatedCost	Estimated Cost
	EventCostId	Event Cost Unique ID
	EventId	Event Unique ID
	ItemName	Event Name Item
EventUser_v		Event Registration by User
	CourseId	Course ID
	CourseName	Course Name
	DateCompleteDeadline	Completion Date Deadline
	DateCompleteStart	Completion Start Date
	DateRegistered	Registration Date
	DaysOverdue	Days Overdue
	EventId	Event ID
	EventName	Event Name (Enrolled/Cancelled Etc.)
	FirstName	First Name
	LastName	Last Name
	MonthRegistered	Registration Month
	MonthYearRegistered	Registration Month And Year
	TotalCompletionDays	Total Completion Days Total Completion Date
	UserId	User ID
	YearRegistered	Registration Year
EventUserEvaluation_v		Event Evaluation Details by User
	CourseId	Course ID
	CourseName	Course Name
	DateEvalTaken	Evaluation Date
	DateRegistered	Registration Date

Views_name	column_name	Table and Fields Descriptions
	EvalEssay	Evaluation Essay
	EvalName	Evaluation Name
	EvalSetId	Evaluation Set ID
	EvalType	Evaluation Type
	EventId	Event ID
	EventName	Event Name (Enrolled/Cancelled Etc.)
	FirstName	First Name
	LastName	Last Name
	MonthRegistered	Registration Month
	MonthYearRegistered	Registration Month And Year
	Question	Question
	QuestionTitle	Question Title
	QuestionType	Question Type
	Response	Response
	UserId	User ID
	YearRegistered	Registration Year
UserAnswer_v		User Answers in a Course
	CorrectAnswer	Correct Answer
	CourseID	Course ID
	CourseName	Course Name
	DateAnswered	Date Answered
	EnvironmentId	Environment ID
	EnvName	Environment Name
	Feedback	Feedback
	FirstName	First Name
	IsCorrect	Indicates if Answer Is Correct
	LastName	Last Name
	ModuleId	Module ID
	ModuleName	Module Name
	PageId	Page ID
	PageLocation	Page Location
	PageName	Page Name
	QuestionType	Question Type
	QuestionWeight	Question Weight
	UserId	User ID

Views_name	column_name	Table and Fields Descriptions
	UsersAnswer	User'S Answer
UserCourseNotRegistered_v		Course Details for Non-Registered Users
	CourseId	Course ID
	CourseName	Course Name
	FirstName	First Name
	LastName	Last Name
	UserId	User ID
UserEnrollmentAllScores_v		Score Details by User
	Assessment	Assessment
	CourseId	Course ID
	CourseName	Course Name
	CreditsEarned	Credits Earned
	DateCancelled	Date of Cancellation
	DateRegistered	Registration Date
	DateScored	Date Scored
	DateWaitlisted	Date when Wait Listed
	EnvId	Environment ID
	EnvName	Environment Name
	Equivalent_Course_Name	Equivalent Course Name
	EventId	Event ID
	EventName	Event Name (Enrolled/Cancelled Etc.)
	ExternalTestName	External Test Name
	FirstName	First Name
	IsCancelled	Indicates if Enrollment Is Cancelled
	IsCreditsEarned	Indicates if there Are Credits Earned
	IsCurrentModeScore	Indicates if In Current Mode Score
	IsCurrentScore	Indicates if Current Score
	IsEnrolled	Indicates if User Is Enrolled (1=Yes, 0=No)
	IsExternalTest	Indicates if Course Has External Test(1=Yes, 0=No)
	IsManualCredit	Indicate if Credit Is Manual
	IsSelfCancelled	Indicates if Self Cancellation Is Allowed
	IsWaitlisted	Indicates if Enrollment Is Waitlisted
	LastName	Last Name
	ModuleId	Module ID
	ModuleName	Module Name

Views_name	column_name	Table and Fields Descriptions
	ModuleWeight	Module Weight
	TotalCorrect	Total Correct Answers
	TotalDuration	Total Duration
	TotalDurationHMS	Total Duration In Hh:Mm:Ss
	TotalQuestions	Total Questions
	TotalSessions	Total Sessionss
	UserCompletionStatus	User Completion Status
	UserId	User ID
	UserStatus	User Status
	WaitNumber	Waitlist Number
	WeightedScore	Weighted Score
UserEnrollmentAllStatuses_v		Enrollment And Status of Course Registration
	Assessment	Assessment
	CourseId	Course ID
	CourseName	Course Name
	CreditsEarned	Credits Earned
	DateCancelled	Date of Cancellation
	DateModified	Date Modified
	DateRegistered	Registration Date
	DateScored	Date Scored
	DateWaitlisted	Date when Wait Listed
	EnvId	Environment ID
	EnvName	Environment Name
	Equivalent_Course_Name	Equivalent Course Name
	EventId	Event ID
	EventName	Event Name
	ExternalTestName	External Test Name
	FirstName	First Name
	IsCancelled	Indicates if Enrollment Is Cancelled
	IsCreditsEarned	Indicates if there Are Credits Earned
	IsCurrentModeScore	Indicates if In Current Mode Score
	IsCurrentScore	Indicates if Current Score
	IsEnrolled	Indicates if User Is Enrolled (1=Yes, 0=No)
	IsExternalTest	Indicates if Course Has External Test(1=Yes, 0=No)
	IsLastUserStatus	Indicate if Credit Is Manual

Views_name	column_name	Table and Fields Descriptions
	IsSelfCancelled	Indicates if Self Cancellation Is Allowed
	IsWaitlisted	Indicates if Enrollment Is Waitlisted
	LastName	Last Name
	ModuleId	Module ID
	ModuleName	Module Name
	ModuleWeight	Module Weight
	ResetDate	Reset Date
	TotalCorrect	Total Correct Answers
	TotalDuration	Total Duration
	TotalDurationHMS	Total Duration In Hh:Mm:Ss
	TotalQuestions	Total Questions
	TotalSessions	Total Sessionss
	UserCompletionStatus	User Completion Status
	UserId	User ID
	UserStatus	User Status
	WaitNumber	Waitlist Number
	WeightedScore	Weighted Score
UserEvaluation_v		Evaluation And/Or Survey Set Responses.
	DateEvalTaken	Evaluation Taken Date
	DateTakenCentral	Date Taken
	DateTakenEastern	Date Taken
	DateTakenMountain	Date Taken
	DateTakenPacific	Date Taken
	EvalEssay	Evaluation Essay
	EvalType	Evaluation Type
	i_users_id	User ID
	Question	Question
	QuestionTitle	Question Title
	QuestionType	Question Type
	Response	Response
	vch_course_id	Course ID
	vch_coursename	Course Name
	vch_eval_set_id	ID of the Evaluation Set
	vch_evalname	Name of the Evaluation
	vch_firstName	First Name

Views_name	column_name	Table and Fields Descriptions
	vch_lastname	Last Name
CourseSummaryData_v		Course Session Summary
	CourseId	Course ID
	CourseName	Course Name
	CustomField	Custom Field
	CustomFieldValue	Custom Field Value
	DateScored	Date Scored
	Equivalent_Course_Name	Equivalent Course Name
	FirstName	First Name
	LastName	Last Name
	ScoreUser	User Score
	SessionDate	Date of Session
	SessionUser	Session User
	UserId	User ID
	UserScore	User Score
EventInstructor_v		Event Instructor Details
	AcademicHistory	Academic History
	AcademicHistoryShow	Indicates if Academic History Is Shown
	Active	Indicates if Instructor Is Active
	Addressoffice	office Addres
	AddressofficeShow	Indicates if office Addess Is Shown
	Country	Country
	CountryShow	Indicates if Country Is Shown
	CourseName	Course Name
	Degrees	Instructor Degrees
	DegreesShow	Indicates if Degrees Are Shown
	Email	Email Address
	EmailShow	Indicates if Email Address Is Shown
	EventID	Event ID
	EventName	Event Name
	FirstName	First Name
	InstructorId	ID of the Instructor
	InstructorName	Name of the Instructor
	IsDefault	Indicates if This Is the Default Instructor of the Event
	LastName	Last Name

Views_name	column_name	Table and Fields Descriptions
	Notes	Notes
	Phone	Phone
	PhoneShow	Indicates if Phone Is Shown
	Publications	Publication
	PublicationsShow	Indicates if Publication Is Shown
	State	State
	StateShow	Indicates if State Is Shown
	UniqueInstructorId	Unique ID of the Instructor
	UniqueInstructorIdShow	Indicates if Unique ID of the Instructor Is Shown
	UserId	Represent the ID of the User
EventApprovalList_V		Event Approval List Details
	ApprovalEmailAddress	Email Address of the Approver
	ApprovalStatus	Status of the Approval
	CourseId	Course ID
	DateRegistered	Registration Date
	DateRequested	Date Requested
	DateResponded	Date Responded
	EventId	Event ID
	ResponseIpAddress	Ip Address of the Response
	UserId	User ID
CourseEventLevel_v		Course Event Level Details
	Branch	Branch
	CourseId	Course ID
	CourseName	Course Name
	EventId	Event ID
	EventName	Event Name
	i_levelid_2	Level ID 2
	Level3Name	Name of Level3
	Level4Name	Name of Level4
	Level5Name	Name of Level5
	LevelID	Level ID
	LevelName	Name of the Level
	LevelNode	Node of the Level
Eventcustomfield_v		Event Custom Field
	CourseId	Course ID

Views_name	column_name	Table and Fields Descriptions
	CourseName	Course Name
	CustomfieldLevelName	Name of the Level Where Custom Field Is Created
	EventId	Event ID
	EventName	Event Name
	FieldName	Field Name
	FieldValue	Field Value
	LevelCreatedAt	Level Where the Custom Field Is Created
	LevelId	Level ID
	LevelName	Name of the Level
Eventcustomfieldallevents_v		Event Custom Fields for All Events
	CourseId	Course ID
	CourseName	Course Name
	CustomfieldLevelName	Level Name Where the Custom Field Is Created
	EventId	Event ID
	EventName	Event Name
	FieldName	Field Name
	FieldValue	Field Value
	LevelCreatedAt	Level Where the Custom Field Is Created
	LevelId	Level ID
	LevelName	Name of the Level
spSurveyOverview (SP)		Survey Overview
	Question title	Question Title
	Question text	Question Text
	User response	User Response
	Eval date	Evaluation Date
	usr_groupby_name	Group Name
	usr_name	User Name
	usr_loginname	Log In Name
	usr_email	Email
	usr_last_name	Last Name
	usr_first_name	First Name
	usr_gender	Gender
	usr_nickname	Nickname
	usr_date_registered	Registration Date
	usr_department	Department

Views_name	column_name	Table and Fields Descriptions
	usr_supervisor_id	Supervisor ID
	usr_title	Title
	usr_dt_hired	Date Hired
	usr_employee_id	Employee ID
	usr_ssn	Ssn
	usr_unique_id	Unique ID
	usr_street_address	Street Address
	usr_address	Address
	usr_county	County
	usr_city	City
	usr_state	State
	usr_country	Country
	usr_zip	Zip
	usr_company	Company
	usr_phone	Phone
	usr_extension	Extension
	usr_education_level	Education Level
	usr_school_graduated	School Graaduated
	usr_date_graduated	Date Graduated
	usr_custom_1	Custom 1
	usr_custom_2	Custom 2
	usr_custom_3	Custom 3
	usr_custom_4	Custom 4
	usr_custom_5	Custom 5
	usr_custom_6	Custom 6
	usr_active	Indicates if User Is Active
	crs_group-by_course_name	Group By Course Name
	crs_course_name	Course Name
	crs_short_name	Short Name
	crs_description	Description
	crs_audience	Audience
	crs_objectives	Objectives
	crs_unique_id	Unique ID
	crs_credit	Credits Earned
	crs_active	Indicates if Course Is Active

Notifications and Audit Trail

Views_name	column_name	Table and Fields Descriptions
NotificationProfileHistory_v		History of Notification Profiles That Are Common For All Levels
	ProfileID	ID of the Notification Profile
	ProfileName	Name of the Notification Profile
	ProfileType	Type of the Notificaiton Profile
	NotificationSendType	Send Type of Notification
	UseUsersFromInformation	Indicates if Users From the Information Will Be Used
	BodyType	Body Type of Notification
	IsEnabled	Indicates if the Profile Is Enabled
	SendAsOutlookMeeting	Indicates if the Notification Is Send As Outlook Meeting
	SendOnlyClassrooms	Indicates if the Notification Is Send Only For Classrooms
	ModificationDate	Date when the Field Was Modified
	DateCreated	Date when the Field Was Created
	CreatedBy	Log In Name of the User Who Created the Record
	CreatedByUserId	User ID of the User Who Created the Record
	UpdatedBy	Log In Name of the User Who Modified the Record
	UpdatedByUserId	Modified By (User ID)
	IsDeleted	Indicates if the Record Is Deleted
NotificationProfileLevelsHistory_v		History of Changes In Default Profile For Each Level
	ProfileID	ID of the Notification Profile
	LevelID	Level ID
	StatusChange	Status Change
	ModificationDate	Date when the Field Was Modified
	UpdatedBy	Log In Name of the User Who Modified the Record
	UpdatedByUserId	Modified By (User ID)
NotificationProfileLocalizedContentHistory_v		History of Changes In Body And Subject For All Notification Profiles And Languages
	ProfileID	ID of the Notification Profile

Views_name	column_name	Table and Fields Descriptions
	Subject	Subject of the Notification
	Lcid	ID of the Localized Content
	Body	Body of the Notification
	ModificationDate	Date when the Field Was Modified
	DateCreated	Date when the Field Was Created
	CreatedBy	Log In Name of the User Who Created the Record
	CreatedByUserId	User ID of the User Who Created the Record
	UpdatedBy	Log In Name of the User Who Modified the Record
	UpdatedByUserId	Modified By (User ID)
NotificationProfileUsersHistory_v		History of Enrollments And Removals of the Users From Notification Profiles
	ProfileID	ID of the Notification Profile
	UserID	User ID
	StatusChange	Enrollment Status
	ModificationDate	Date when the Field Was Modified
	UpdatedBy	Log In Name of the User Who Modified the Record
	UpdatedByUserId	Modified By (User ID)
spAuditTrailGetNotificationProfileHistoryChangeSet		Changes In Notification Profile
	userID (param)	User ID, All Users if Blank
	dateFrom (param)	Start Date of Changes, blank if none
	dateTo (param)	End Date of Changes, blank if none
	lcID (param)	Changes Specific For the LCID, All if Blank Or 0
	lcid	LcID if the Change Is Language Specific, 0 Otherwise
	modificationDate	Date of the Modification
	newValue	New Value of the Property
	notificationProfileId	ID of the Profile
	oldValue	Old Value of the Property
	propertyName	Name of the Property
	updatedBy	Name of the User Or Application Who/Which Updated the Property
	updatedById	ID of User Who Updated the Property, Null if It'S An Application

Scores

Views_name	column_name	Table and Fields Descriptions
CourseCompletionSummary_v		Course Completion Summary
	AverageCourseScore	Average Score of All the Assigned Users
	CourseId	Course ID
	CourseName	Course Name
	EnrolledUserCount	Enrolled User total
	FailedUserCount	Number of Users Who Failed the Course
	MaximumCourseScore	Highest Score Achieved in the Course
	MinimumCourseScore	Lowest Score Achieved in the Course
	NoFinalScoreUserCount	Total of users with no final score
	PassedUserCount	Passed User Count Number of Users Who Passed the Course
CourseCompletionSummaryByUser_v		Course Completion Summary by User
	CourseId	Course ID
	CourseName	Course Name
	CourseType	Type of the Course
	DateCompleteDeadline	Date of Completion Deadline
	DateRegistered	Registration Date
	Datescored	Score Date
	Enrolled	Indicates if the User Is Enrolled (1=Yes, 0=No)
	Equivalent_Course_Name	Equivalent Course Name
	Failed	Indicates if the User Failed In the Course (1= Yes /0= No)
	FirstName	First Name
	LastName	Last Name
	NoFinalScore	Indicates if the User Received A Score (1= Yes /0= No)
	Overdue	Indicates if Over Due
	Passed	Indicates if the User Passed the Course (1= Yes /0= No)
	UserId	User ID
CourseCompletionSummaryByDistributionGroups_v		Shows Summary of Course Completion By Distribution Group

Views_name	column_name	Table and Fields Descriptions
	UserId	User ID
	LastName	Last Name
	FirstName	First Name
	CourseId	Course ID
	CourseName	Course Name
	Enrolled	Indicates if User Is Enrolled
	Passed	Indicates if Passed
	Failed	Indicates if Failed
	NoFinalScore	Indicates if No Final Score
	DateRegistered	Registration Date
	DateScored	Date Scored
	CourseType	Course Type
	EquivalentCourseName	Equivalent Course Name
	DistributionGroupID	Distribution Group ID
	DistributionGroupIsActive	Indicates if Distribution Group Is Active
	DistributionGroupName	Distribution Group Name
	DistributionGroupDescrip-tion	Distribution Group Description
	DistributionGroupCreated	Created On
	DistributionGroupModified	Date Modified
	LevelID	Level ID
	LevelName	Level Name
	LevelNode	Level Node
CourseUserScore_v		Course Score By User
	Assessment	Assessment Type
	CourseId	Course ID
	CourseName	Course Name
	DateClassroomEnd	Classroom Event End Date
	DateClassroomStart	Classroom Event Start Date
	DateEventEnd	Event End Date
	DateEventStart	Event Start Date
	DateOnlineEnd	Online Event End Date
	DateOnlineStart	Online Event Start Date
	DateRegEnd	Event Registration End Date
	DateRegStart	Event Registration Start Date
	DateScored	Date when the Course Was Scored

Views_name	column_name	Table and Fields Descriptions
	DateSelfCancelEnd	Date when Self-Cancellation Ends
	DateVLSEnd	VLS Event End Date
	DateVLSStart	VLS Event Start Date
	EnvId	Environment ID Based On the Relevant Section of the Course
	EnvName	Environment Name Based On the Relevant Section of the
	Equivalent_Course_Name	Equivalent Course Name
	EventId	Event ID
	EventIsCancelled	Indicates if the Event Is Cancelled
	EventName	Event Name
	EventType	Type of the Event
	ExternalTestName	External Test Name
	FirstName	First Name
	FirstSessionDate	First Session Date
	IsExternalTest	Indicates if It Is An External Test
	IsManualCredit	Determines if User Received Course Credit
	LastName	Last Name
	LastSessionDate	Last Date of the Session Taken By the User
	MaxEnrollment	Maximum Enrollment
	MinEnrollment	Minimum Enrollment
	ModuleId	Module ID Based On the Relevant Section of the Course
	ModuleName	Module Name Based On Relevant Section of the Course
	ModuleWeight	Module Weight For Scoring
	Notes	Event Notes
	PassingScore	Passing Score
	TotalCorrect	Total Correct Answers Provided By the User
	TotalDuration	Total Duration of the Course In Seconds
	TotalDurationHMS	Total Duration of the Course In Hh:Mm:Ss
	TotalQuestions	Total Amount of Questions In the Course
	TotalSessions	Number of Sessions Availed By the User
	UserCompletionStatus	Course Status Based On the Availability of A Completion Date
	UserId	User ID
	UserStatus	Course Status With Respect To the User (Passed, Failed Or Undetermined)
	WeightedScore	Score the User Has Earned
CurriculumUserScore_v		User Score In Curriculum

Views_name	column_name	Table and Fields Descriptions
	CourseClassification	Course Classification
	CourseCreditsAvailable	Course Credits Available
	CourseCreditsEarned	Credits Earned
	CourseId	Course ID
	CourseName	Course Name
	CourseOrder	Course Order
	CurriculumComplete	Indicates if Curriculum Is Complete
	CurriculumDescription	Describes the Curriculum Description
	CurriculumId	ID of the Curriculum
	CurriculumName	Name of the Curriculum
	DateCourseScored	Date Scored
	DateCurriculumCompleted	Date when Completed
	DateReset	Indicates if Date Is Reset
	Equivalent_Course_Name	Equivalent Course Name
	FirstName	First Name
	i_session_count	Number of Sessions
	IsCcrActive	Indicates if Curriculum Is Active
	IsManualCredit	Indicates if Manual Credit
	LastName	Last Name
	TotalCurriculumCredits	Total Curriculum Credits
	TotalDuration	Total Duration
	TotalDurationHMS	Total Duration In HH:MM:SS
	UserCourseCompletion-Status	Completion Status of the User
	UserCourseStatus	User Course Status
	UserCurriculumStatus	User Status In Curriculum
	UserId	User ID
	WeightedScore	Weighted Score For the Course
UserExternalCredit_v		Shows External Credit Details
	#ofCredits	Number of Credits Earned By the User
	CreditName	Name of the Credit
	DateScored	Date when the Credit Was Assigned
	FirstName	First Name
	IsPass	Indicates if the User Passed
	LastName	Last Name
	Score	Score Received By the User

Views_name	column_name	Table and Fields Descriptions
	UserId	User ID
UserScore_v		User scores
	Assessment	Assessment Type
	CourseId	Course ID
	CourseName	Course Name
	CreditsEarned	Credits Earned By the User By Passing the Course. if the User Could Not Pass the Course, the Field Contains 0.
	DateModified	Date Modified
	DateScored	Date Scored
	EnvId	Environment ID Based On the Relevant Section of the Course
	EnvName	Environment Name Based On the Relevant Section of the
	Equivalent_Course_Name	Equivalent Course Name
	EventId	Event ID
	EventName	Event Name
	ExternalTestName	External Test Name
	FirstName	First Name
	IsCreditsEarned	Indicates if Credits Earned
	IsCurrentModeScore	Indicates if Current Mode Score
	IsCurrentScore	Indicates if Score Is Current
	IsExternalTest	Indicates if External Test
	IsManualCredit	Indicates if Manual Credit
	LastName	Last Name
	ModuleId	Module ID Based On the Relevant Section of the Course
	ModuleName	Module Name Based On Relevant Section of the Course
	ModuleWeight	Module Weight For Scoring
	TotalCorrect	Total Correct Answers Provided By the User
	TotalDuration	Total Duration of the Course In Seconds
	TotalDurationHMS	Total Duration of the Course In Hh:Mm:Ss
	TotalQuestions	Total Amount of Questions In the Course
	TotalSessions	Number of Sessions Availed By the User
	UserCompletionStatus	Course Status Based On the Availability of A Completion Date
	UserId	User ID
	UserStatus	Course Status With Respect To the User (Passed, Failed Or Undetermined)
	WeightedScore	Score the User Has Earned

Views_name	column_name	Table and Fields Descriptions
UserScoreEnrollment_v		User Enrollment Scores
	Assessment	Assessment Type
	CourseId	Course ID
	CourseName	Course Name
	CreditsEarned	Credits Earned By the User By Passing the Course. if the User Could Not Pass the Course, the Field Contains 0.
	DateCancelled	Date Cancelled
	DateRegistered	Registration Date
	DateScored	Date Scored
	DateWaitlisted	Date Waitlisted
	EnvId	Environment ID Based On the Relevant Section of the Course
	EnvName	Environment Name Based On the Relevant Section of the
	Equivalent_Course_Name	Equivalent Course Name
	EventId	Event ID
	EventName	Event Name
	ExternalTestName	External Test Name
	FirstName	First Name
	IsCancelled	Indicates if Cancelled
	IsCurrentModeScore	Indicates if Score Is Current Mode
	IsCurrentScore	Indicates if Current Score
	IsEnrolled	Indicates if Enrolled
	IsExternalTest	Indicates if External Test
	IsManualCredit	Indicates if Manual Credit
	IsSelfCancelled	Indicates if Self Cancelled
	IsWaitlisted	Indicates if Waitlisted
	LastName	Last Name
	ModuleId	Module ID Based On the Relevant Section of the Course
	ModuleName	Module Name Based On Relevant Section of the Course
	ModuleWeight	Module Weight For Scoring
	TotalCorrect	Total Correct Answers Provided By the User
	TotalDuration	Total Duration of the Course In Seconds
	TotalDurationHMS	Total Duration of the Course In HH:MM:SS
	TotalQuestions	Total Amount of Questions In the Course
	TotalSessions	Number of Sessions Availed By the User
	UserCompletionStatus	Course Status Based On the Availability of A Completion Date

Views_name	column_name	Table and Fields Descriptions
	UserId	User ID
	UserStatus	Course Status With Respect To the User (Passed, Failed Or Undetermined)
	WaitNumber	Waitlist Number assigned to User
	WeightedScore	Score the User Has Earned
UserTraining_v		Certificates And Curricula assigned to users
	AssessmentType	Assessment Type
	Cert Status	Current Status of the Certificate
	CertificateID	ID of the Certificate
	CertificateName	Name of the Certificate Course Is Associated With
	CourseDateReset	Date Course Will Be Reset For the User
	CourseEndDate	Last Date To Take the Course For User
	CourseID	Course ID
	CourseName	Course Name
	CourseType	Event Type User Is Enrolled In (Online/Classroom)
	CurriculumID	Represents ID of the Curriculum Associated With the Certificate.
	CurriculumName	Represents Curriculum Name
	DateCourseScored	Date when the Course Was Scored
	DatePassed	Date User Passed the Certificate
	Eventname	Event Name
	FirstName	First Name of User
	i_event_id	Event ID
	i_Session_Count	Number of Sessions the User Has For the Specified Course In the Curriculum
	IsManualCredit	Represents if the User Was Given Course Credit
	LastName	Last Name
	RecertStart	Date Re-Certification Starts
	TotalDuration	Total Duration In Seconds
	TotalDurationHMS	Total Duration In Hh:Mm:Ss
	UserCourseCompletionStatus	Course Status of the User (Complete/Not Complete)
	UserCourseStatus	Course Status of the User (Passed/Failed/Undetermined)
	UserID	User ID
	ValidUntil	Date until which the Certificate is Valid
	WeightedScore	User Score For the Course
UserTrainingOverview_v		User Training Overview

Views_name	column_name	Table and Fields Descriptions
	AssessmentType	Assessment Type
	Cert Status	Current Status of the Certificate
	CertificateId	ID of the Certificate
	CertificateName	Name of the Certificate Course Is Associated With
	CourseEndDate	Date User Has To Complete the Course By
	CourseID	Course ID
	CourseName	Course Name
	CourseType	Event Type User Is Enrolled In (Online/Classroom)
	CurriculumID	Represents ID of the Curriculum Associated With the Certificate.
	CurriculumName	Represents Curriculum Name
	DateCourseScored	Date when the Course Was Scored
	DateCurriculumCompleted	Date Curriculum Was Completed By User
	DatePassed	Date User Passed the Certificate
	DateReset	Date Curriculum Will Be Reset For the User
	Eventname	Event Name
	FirstName	First Name of User
	i_event_ID	Event ID
	i_Session_Count	Number of Sessions the User Has For the Specified Course In the Curriculum
	IsEventEnrolled	Represents if the Event Was Enrolled
	IsManualCredit	Represents if the User Was Given Course Credit
	LastName	Last Name
	RecertStart	Date Recertification Starts
	TotalDuration	Total Duration In Seconds
	TotalDurationHMS	Total Duration In Hh:Mm:Ss
	UserCourseCompletionStaus	Course Status of the User (Complete/Not Complete)
UserCourseTraining_v		Details for All Courses for which the user is registered.
	AssessmentType	Assessment Type
	CourseDateReset	Date Course Will Be Reset For the User
	CourseEndDate	Last Date To Take the Course For User
	CourseID	Course ID
	CourseName	Course Name
	CourseType	Event Type User Is Enrolled In (Online/Classroom)
	CustomField	Represents Custom Field Associated With the Course
	CustomFieldValue	Custom Field Value For the Course.

Views_name	column_name	Table and Fields Descriptions
	DateCourseScored	Completion Date
	EventID	Event ID
	Eventname	Event Name
	FirstName	First Name of User
	i_session_count	Number of Sessions the User Has For the Specified Course In the Curriculum
	IsManualCredit	Represents if the User Was Given Course Credit
	LastName	Last Name
	TotalDuration	Total Duration In Seconds
	TotalDurationHMS	Total Duration In Hh:Mm:Ss
	UserCourseCompletion-Status	Course Status of the User (Complete/Not Complete)
	UserCourseStatus	Course Status of the User (Passed/Failed/Undetermined)
	UserID	User ID
	WeightedScore	Weighted Score For the Course
Transcript_v		User Transcript Details
	CompletionActivity	Completion Activity
	CourseDateReset	Date the Course Will Be Reset
	CourseID	Course ID
	CourseName	Represent the Course Name
	CourseScoreType	Score Type of Course
	CourseType	Event Type the User Is Enrolled In(Online/Classroom)
	CreditsAvailable	Available Credits
	CreditsEarned	Credits Earned By the User By Passing the Course. if the User Could Not Pass the Course, the Field Contains 0.
	DateCourseScored	Date when the Course Was Scored
	EventCompleteDeadline	Event Completion Deadline
	EventID	Event ID Assigned To the User. It Will Be Blank For the Course Scores
	Eventname	Event Name Assigned To the User. It Will Be Blank For the Course Scores
	FirstName	First Name
	IsCourseCredit	Indicates if there is a Course Credit
	IsCurrentScore	Indicates if the Score Is the Latest/Newest (Yes/No)
	LastName	Last Name
	SessionCount	Number of Sessions
	TotalDuration	Total Duration of the Course In Seconds

Views_name	column_name	Table and Fields Descriptions
	TotalDurationHMS	Total Duration of the Course In HH:MM:SS
	UserCourseCompletion-Status	Completion Status of the Course For the User
	UserCourseStatus	Course Status of the User (Passed/Failed/Undetermined)
	UserID	User ID
	UserName	Name of the Ser
	WeightedScore	Score the User Has Earned
CurriculumUserCompletion_v		Curriculum completion details by user
	CompletedCurriculum-Credits	Completion Curriculum Credits
	CompletionDeadline	Completion Deadline
	CurriculumCompletePer-centage	Completion Percentage
	CurriculumDescription	Curriculum Description
	CurriculumId	Curriculum ID
	CurriculumName	Curriculum Name
	DateCurriculumCompleted	Date Curriculum Completed
	DateRegistered	Registration Date
	DaysOverdue	Days Overdue
	Enrolled	Indicates if Enrolled
	FirstName	First Name
	LastName	Last Name
	NotPassed	Indicates if Not Passed
	Passed	Indicates if Passed
	TotalCurriculumCredits	Total Curriculum Credits
	UserCurriculumStatus	Usercurriculumstatus User Curriculum Status
	UserId	UserID User ID
CourseSummaryData_v User Course Score per Session		
	UserId	User ID
	FirstName	First Name
	LastName	Last Name
	CourseId	Course ID
	CourseName	Course Name
	SessionUser	Session User
	SessionDate	Session Date
	ScoreUser	Score User
	UserScore	User'S Score

Views_name	column_name	Table and Fields Descriptions
	DateScored	Date Scored
	CustomField	Custom Field
	CustomFieldValue	Custom Field Value For the Course
	Equivalent_Course_Name	Equivalent Course Name
CourseUserLastScore_v		User Last Score for the Course
	UserId	User ID
	FirstName	First Name
	LastName	Last Name
	UserName	User Name
	CourseId	Course ID
	ShortName	Short Name
	CourseName	Course Name
	ResetDate	Date Reset
	Score	Score
	UserStatus	User Status
	Passed	Indicates if Passed
	CourseStatus	Course Status
	AssessmentName	Assessment Name
	DateScored	Date Scored
	UserIsActive	Indicates if User Is Active
	UserActive	User Active
	CourseIsActive	Indicates if Course Is Active
	CourseActive	Course Active
	Equivalent_Course_Name	Equivalent Course Name

Sessions

Views_name	column_name	Table and Fields Descriptions
AdminSession_v		Administrator session details
	Duration	Duration of Administrator Session In Seconds
	DurationHMS	Duration of Administrator Session In
	FirstName	First Name
	LastName	Last Name
	SessionStart	Date when the Administrator Session Was Started Dd/Mm/Yyyy
	UserId	User ID
AdminUserSessionTotal_v		Total sessions for Administrator
	First Name	First Name
	Last Name	Last Name
	Total Duration	Total Amount of Time of All Administrator Sessions In Seconds
	Total Duration HMS	Total Amount of Time of All Administrator Sessions In HH:MM:SS
	Total Sessions	Number of Administrator Sessions that were opened
	User ID	User ID
CourseSession_v		Details for Each Session For Users Assigned To Courses.
	CourseId	Course ID
	CourseName	Course Name
	Duration	Session Duration For the User In Seconds
	DurationHMS	Session Duration For the User In Hh:Mm:Ss
	FirstName	First Name
	LastName	Last Name
	SessionStart	Session Start Date In MM/DD/YYYY
	UserId	User ID of the User
CourseSessionSummary_v		Course Session Summary
	AverageSessionDuration	Average Session Duration In Seconds

Views_name	column_name	Table and Fields Descriptions
	AverageSessionDurationHMS	Average Session Duration In Hh:Mm:Ss
	CourseId	Course ID
	CourseName	Course Name
	EnrolledUserCount	Enrolled User Count
	MaximumSessionDuration	Maximum Session Duration In Seconds
	MaximumSessionDurationHMS	Maximum Session Duration In Hh:Mm:Ss
	MinimumSessionDuration	Minimum Session Duration In Seconds
	MinimumSessionDurationHMS	Minimum Session Duration In Hh:Mm:Ss
	NoSessionUserCount	Number of Users Who Have Not Started the Session
	SessionUserCount	Number of Users Who Have Started the Session
CourseSessionSummaryByUser_v		Course Session Summary By User
	AverageSessionDuration	Average Duration of the Session In Seconds
	AverageSessionDurationHMS	Average Duration of the Session In HH:MM:SS
	CourseId	Course ID
	CourseName	Course Name
	Enrolled	Indicates if the User Is Enrolled (1=Yes, 0=No)
	FirstName	First Name
	FirstSessionDate	First Session Date
	i_users_id	User ID
	LastName	Last Name
	LastSessionDate	Last Session Date
	MaximumSessionDuration	Maximum Session Time Taken By the User In Seconds
	MaximumSessionDurationHMS	Maximum Session Time Taken By the User In HH:MM:SS
	MinimumSessionDuration	Minimum Session Time Taken By the User In Seconds
	MinimumSessionDurationHMS	Minimum Session Time Taken By the User In HH:MM:SS
	NoSessions	Indicates if the User DID Not Start A Session (1=Yes/0=No)
	Sessions	Number of Sessions Started By the User
CourseUserSessionTotal_v		Total of user course sessions
	Course ID	Course ID
	Course Name	Course Name
	First Name	First Name
	FirstSessionDate	First Session Date

Views_name	column_name	Table and Fields Descriptions
	Last Name	Last Name
	LastSessionDate	Last Session Date
	Total Duration	Total Duration of the Session In Seconds
	Total Duration HMS	Total Duration of the Session In HH:MM:SS
	Total Session	Number of Sessions Started By the User
	User ID	User ID
EventSession_v		Event Session details
	Address	Event Address
	CourseId	Course ID
	CourseName	Course Name
	Description	Event Description
	EventId	Event ID
	EventName	Event Name
	FacilityDescription	Facility Description
	FacilityId	Facility ID
	FacilityName	Facility Name
	Instructor	Event Instructor
	SessionEndDate	Session End Date For the Event
	SessionStartDate	Session Start Date For the Event
	Timezone	Event Time Zone
	TotalHours	Total Hours for the Event
	VLSInstructorId	ID of the Instructor
	Weekday	Day For the Event
LearnerSession_v		Learner Session Details
	DateSessionStart	Session Start Date
	Duration	Session Duration In Seconds
	DurationHMS	Session Duration In HH:MM:SS
	FirstName	First Name
	LastName	Last Name
	UserId	User ID
LearnerUserSessionTotal_v		Learner Session Totals
	FirstName	First Name
	LastName	Last Name
	TotalDuration	Total Learner Session Duration In Seconds
	TotalDurationHMS	Total Learner Session Duration In Hh:Mm:Ss

Views_name	column_name	Table and Fields Descriptions
	TotalSession	Number of Learner Sessions
	UserId	User ID
EventSessionAttendance_v		Event Session Attendance
	Address	Address
	CourseID	Course ID
	CourseName	Course Name
	Description	Description
	EventID	Event ID
	EventName	Event Name
	EventSessionID	Event Session ID
	FacilityDescription	Facility Description
	FacilityID	Facility ID
	FacilityName	Facility Name
	FirstName	First Name
	Instructor	Instructor
	LastName	User Last Name
	SessionEndDate	Session End Date
	SessionStartDate	Session Start Date
	Timezone	Time Zone
	TotalHours	Total Hours
	UserID	User ID
	Weekday	Weekday
ElearningAttendanceByPortalManager_V		E-Learning Attendance By Portal Manager
	AdminID	Admin ID
	Company Name	Company Name
	Course Name	Course Name
	Course Short Name	Course Short Name
	Number of Sessions	Number of Sessions
	Pass	Pass
	Passing Score	Passing Score
	Score Date	Score Date
	Time Online	Time Online
	User Name	User Name
	User Score	User Score
ClassroomAttendanceByPortalManager_v		Classroom Attendance By Portal Manager

Views_name	column_name	Table and Fields Descriptions
	AdminID	Admin ID
	Attendance	Attendance
	Company Name	Company Name
	Course Name	Course Name
	Course Short Name	Course Short Name
	CreditInfo	Credit Info
	EventEndDate	Event End Date
	EventName	Event Name
	EventStartDate	Event Start Date
	SessionDate	Session Date
	User Name	User Name

Users

Views_name	column_name	Table and Fields Descriptions
LevelUser_v		Location of the User(S) In the Lms Level Hierarchy.
	Branch	Name of the Parent Level-2 Field For Any Level. For Level 2 Fields, It Contains "System".
	FirstName	First Name
	HierarchyLocation	Hierarchy Location
	IsLowestLevelNode	Indicates if Lowest Level Node
	LastName	Last Name
	LevelId	Level ID Where the User Is Located
	LevelName	Name of the Level Where the User Is Located
	LevelNode	Level Tier (System Is 1) Where the Course Is Located
	UserId	User ID User ID
Users_v		Users, Supporting All User Fields.
	AccessExpirationDate	Date when User Will Not Have Access To Portal
	AccessTerm	Access Term
	Citizenship	User'S Current Country of Citizenship
	City	City Where the User Is Located
	Company	Company Where the User Works
	Country	Country Where the User Is Located
	CountryofBirth	Country Where the User Was Born
	CountryofOrigin	Country Where the User Hails From
	County	County Where the User Is Located
	CreatedBy	Created By
	CreatedByUserId	UserID of User Who Created the Record
	Custom_1	Custom 1 Custom Field By the User
	Custom_2	Custom 2 Custom Field By the User
	Custom_3	Custom 3 Custom Field By the User
	Custom_4	Custom 4 Custom Field By the User
	Custom_5	Custom 5 Custom Field By the User

Views_name	column_name	Table and Fields Descriptions
	Custom_6	Custom 6 Custom Field By the User
	DateCreated	Created On
	DateDeactivation	Deactivation Date
	DateGraduated	User'S Graduation Date
	DateHired	Date when the User Was Hired
	DateLeave	Leave Date
	DateLeaveDeactivation	Deactivation Leave Date
	DateofBirth	Date of Birth
	DateRegistered	Registration Date Mm/Dd/Yyyy
	Deduction	Deduction Represents Any Monetary Deduction For the User
	Department	Department
	EducationLevel	Education Level
	Email	Email ID
	EmergencyContact	Emergency Contact
	EmergencyPhone	Emergency Phone Number
	EmployeeId	Employee ID
	Extension	Extension Number
	Fax	Fax Number
	FirstName	First Name
	Gender	Gender
	Hobby	Hobby
	HomePhone	Home Number
	IsActive	Indicates if the User Is Active
	LastName	Last Name
	LocaleID	Localeid
	LoginName	Login Name
	MaritalStatus	Marital Status
	ModificationDate	Date when Modified
	NickName	Nickname
	PaymentProfileId	Payment Profile ID
	Phone	Phone Number
	RegionalLocalID	Regional Local ID
	Salary	Salary
	SchoolGraduated	School the User Graduated From
	SpouseName	Spouse Name

Views_name	column_name	Table and Fields Descriptions
	SSN	Social Security Number
	State	State From Where the User Hails
	StreetAddress	Street Address
	StreetAddress2	Street Address 2
	SupervisorId	User ID 'S Supervisor
	SupervisorIdTxt	User ID 'S Supervisor
	Title	Title
	UniqueId	Unique ID
	UpdatedBy	Modified By
	UpdatedByUserId	UserUser ID Who Modified
	UserId	User ID
	UserName	Name
	Zip	Zip Code
Users2_v		This View Has Been Included To Support Certain Scenarios Where It Is Necessary To Filter A Report On Several Different Users' Fields. Except the Name of the View, This View Is the Same As Users_V.
	AccessExpirationDate	Date when User Will Not Have Access To Portal
	AccessTerm	Access Term
	Citizenship	User'S Current Country of Citizenship
	City	City Where the User Is Located
	Company	Company Where the User Works
	Country	Country Where the User Is Located
	CountryofBirth	Country Where the User Was Born
	CountryofOrigin	Country Where the User Hails From
	County	County Where the User Is Located
	CreatedBy	Created By
	CreatedByUserId	UserID of User Who Created the Record
	Custom_1	Custom 1 Custom Field By the User
	Custom_2	Custom 2 Custom Field By the User
	Custom_3	Custom 3 Custom Field By the User
	Custom_4	Custom 4 Custom Field By the User
	Custom_5	Custom 5 Custom Field By the User
	Custom_6	Custom 6 Custom Field By the User
	DateCreated	Created On
	DateDeactivation	Deactivation Date
	DateGraduated	User'S Graduation Date

Views_name	column_name	Table and Fields Descriptions
	DateHired	Date when the User Was Hired
	DateLeave	Leave Date
	DateLeaveDeactivation	Deactivation Leave Date
	DateofBirth	Date of Birth
	DateRegistered	Registration Date Mm/Dd/Yyyy
	Deduction	Deduction Represents Any Monetary Deduction For the User
	Department	Department
	EducationLevel	Education Level
	Email	Email ID
	EmergencyContact	Emergency Contact
	EmergencyPhone	Emergency Phone Number
	EmployeeId	Employee ID
	Extension	Extension Number
	Fax	Fax Number
	FirstName	First Name
	Gender	Gender
	Hobby	Hobby
	HomePhone	Home Number
	IsActive	Indicates if the User Is Active
	LastName	Last Name
	LocaleID	Localeid
	LoginName	Login Name
	MaritalStatus	Marital Status
	ModificationDate	Date when Modified
	NickName	Nickname
	PaymentProfileId	Payment Profile ID
	Phone	Phone Number
	RegionalLocalID	Regional Local ID
	Salary	Salary
	SchoolGraduated	School the User Graduated From
	SpouseName	Spouse Name
	SSN	Social Security Number
	State	State
	StreetAddress	Street Address
	StreetAddress2	Street Address 2

Views_name	column_name	Table and Fields Descriptions
	SupervisorId	Supervisor User ID
	SupervisorIdTxt	Supervisor User ID
	Title	Title
	UniqueId	Unique ID
	UpdatedBy	Modified By
	UpdatedByUserId	Modified by (user ID)
	UserId	User ID
	UserName	Name
	Zip	Zip Code
UserPerms_v		User Permissions.
	First Name	First Name
	Last Name	Last Name
	Permission	Name of the Permission
	Permission ID	Permission ID
	User ID	User ID
UserPermsGroup_v		User Permissions Groups
	First Name	First Name
	Group Name	Group Name
	Last Name	Last Name
	PermGrpID	ID of the Permission Group to which the User Is assigned
	Perm ID	ID of the Permission That Is Part of the Group
	Permission	Name of the Permission
	User ID	User ID
UserSessionAttendance_v		User Session Attendance
	CourseName	Course Name
	EventID	Event ID
	EventName	Event Name
	FirstName	First Name
	LastName	Last Name
	Number_of_Session	Number of Sessions Started By the User
	UserID	User ID
Instructor_v		Instructors
	Academic History	Academic History
	Academic History Show	Academic History Show
	Active	Represents if the Event Is Active

Views_name	column_name	Table and Fields Descriptions
	Addressoffice	Office Address
	Addressoffice Show	Office Address Show
	Country	Country
	Country Show	Country Show
	Degrees	Degrees
	Degrees Show	Degrees Show
	Email	Email Address
	Email Show	Email Address Show
	First Name	First Name
	Instructor ID	Instructor ID
	Instructor Name	Instructor Name
	Last Name	Last Name
	Notes	Notes
	Phone	Phone Number
	Phone Show	Phone Number Show
	Publications	Publications
	Publications Show	Publications Show
	State	State
	State Show	State Show
	Unique Instructor ID	Unique Instructor ID
	Unique Instructor ID show	Unique Instructor ID Show
	User ID	User ID
spSeminarStatistic (SP)		Seminar Statistics
	Seminar ID	ID of the Seminar
	Seminar Name	Name of the Seminar
	Number of enrollments	Number of Enrollments
	Number of completions	Number of Completions
LevelUserHistory_v		User Level Movement History
	LevelID	Level ID
	UserID	User ID
	StatusChange	Changes of the Status
	ModificationDate	Date Modified
	UpdatedBy	Log In NameWho Modified
	UpdatedByUserId	User ID
UserCommonFieldHistory_v		User Common Field History

Views_name	column_name	Table and Fields Descriptions
	UserID	User ID
	CFID	Common Field ID
	CFName	Common Field Name
	CFValue	Default Value of the Common Field
	ModificationDate	Date Modified
	DateCreated	Date of Creation of the Common Field
	CreatedBy	Log In NameWho Created
	CreatedByUserId	User ID
	UpdatedBy	Log In NameWho Modified
	UpdatedByUserId	User ID
	IsDeleted	Indicates if Common Field Was Deleted
UserPortalLastLoggedTime_v		Dates And Times of the Previous And Last User Logins to Each ILM Portal
	UserId	User IDWho Logged In
	LastName	Last Name
	FirstName	First Name
	PortalId	Portal ID
	PortalName	Name of the Portal
	LastLoginDate	Date of the Last Log In
	LoginBeforeDate	Date of the Previous Log In

Acronym

Letters that are used to represent a longer word or series of words. In Content Creator authors create acronyms, whereby users viewing a course can see the longer word or definition of an acronym by mousing over the acronym.

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.

Ad Hoc e-Meeting

e-Meetings that are independent of events. E-Meeting facilitators can schedule Ad Hoc e-Meetings in the Portal or in ILM.

Administrator

Users who have rights in ILM. Administrators are able to manage users, courses, curricula, certifications, credits, instructors, facilities, and ILM options.

AICC

See Aviation Industry CBT Committee.

Author

Users who can create and edit ILM courses in Content Creator. An author must be given rights to retrieve and publish other authors’ courses.

Automatic Waitlist Removal

Removes users from a course event waitlist, when that user registers for another event for the same course.

Aviation Industry CBT Committee (AICC)

An association of technology-based training professionals that develops guidelines for the development, delivery, and evaluation of computer based training. AICC has developed 11 Guidelines & Recommendations (AGR's) for computer based training.

Blended

A curriculum that contains both online and classroom training events.

Certificate

Documents that are given to individuals who have completed certification programs.

Certification Program

Tracks the activities that individuals are required to complete in order to earn a certification. Certification Programs consist of courses and curricula.

Chargeback

A single rate that is charged for a course. This can be either by hour or user.

Chart

Feature of Ad Hoc Reports. Administrators can include one of three chart types in their reports. These chart types include trend, pie, plot, and bar.

Children Levels

Sub levels of a level in the Level Hierarchy. A level is a child level of level 1, as a level 3 is the child level of a Level 2.

Classroom Course

A course that takes place in a classroom, and is led by an instructor. Classroom courses are scheduled and managed in ILM.

Codepage

Microsoft designated indicator that represents a group of related languages.

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.

Comment

A feature in ILM where users to make suggestions and recommendations for alteration of course content. Comments are then managed in ILM Administrator.

Coupon

Discount taken off the total price of a course for portals that utilize e-Commerce. Coupons can take a percentage or a fixed amount off of the course price.

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.

Course Audience

The groups or individuals for whom a course is intended.

Course and Curriculum Manager

A role that is created to form a relationship between a manager and courses and curricula that are assigned to them. Course and Curriculum Managers have rights to perform certain functions for the courses and curricula assigned to them.

Course Description

The course overview. It may explain the purpose and usefulness of the course, supplemented by a brief summary.

Course Display Resolution

The size of the user's browser window, in pixels, when a course is started.

Course Objective

A list with the knowledge that the user should learn from the course.

Course Optimizer

A tool used for maintenance functions to troubleshoot items in the repository, and remove unnecessary items from the repository for efficient publishing to the server.

Course Short Name

Identification code or name for a course. This name is for internal record keeping purposes, and is not displayed to the user.

Course Specific

The term given to Style Sheets, Learning Objects, and Repository items, such as graphics, documents, and animations, to indicate that they are ONLY available for use in a specific course. You can only set an item as Course-Specific when you first add it to the Repository. You can promote a Learning Object to Level-Two or System Wide, but you can NOT demote to a lower level.

CSV

See Comma-Separated Values.

Current Position

The position that a user was hired to perform.

Curriculum

A collection of courses. Users must pass all of the courses in a curriculum in order to pass the curriculum.

Curriculum Description

The curriculum overview. The purpose and usefulness of the curriculum and the required courses are displayed and may be supplemented by a brief summary.

Custom 1 – 6

The six user fields that administrators to customize.

Data Mart

Collection of facts from various data sources with specific focus on a particular subject or issue to be solved. Information is extracted from the ILM database and placed into data marts. Dynamic Reports are generated with information contained in these data marts.

Default

The initial settings of an application. When an application is reset, it will return to those initial settings.

Difference

The gap between a users pre and post assessment scores.

e-Collaboration

Use of electronic technologies to meet with other people. Users to meet through WebEx.

e-Commerce

Feature used to charge users for course events. E-Commerce can be enabled in ILM for one or more Portals.

e-Meeting Facilitator

A user who creates e-Meetings in the Portal using WebEx.

Editing Resolution

The size of the content area editing screen in Content Creator. Author can select the editing resolution from the item list in the upper right hand corner of the screen.

Eligible Position

Positions that are related to a user's current position. This position may be in the user's career path, or a position that the user must assume from time to time. Users are assessed based on the skills that make up the eligible position.

Environment

One of up to five parts of a course. Environments are made up of Modules. Environments are where users work on tasks, such as complete assessments, learn content, read reference materials.

Evaluation

ILM forms used for collecting feedback. A standard evaluation is associated with every course: ILM, online, or classroom. Users can access the evaluation while taking a course through ILM Learner. In addition to the standard evaluation, administrators can create custom evaluations that consist of any combination of instructions and multiple choice questions. Each multiple-choice question has an associated response set that must consist of five options.

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.

Event Cost

1) The difference between the amount users are charged for the course, and the amount the course costs to take place. This kind of event cost can be managed in Courses > Course Name > Course Events > View Event Cost. 2) The amount an organization charges internal users. This kind of event cost can be specified in the Schedule Course Wizard.

Event Template

Templates used to schedule courses quickly and efficiently. The information that is specified for similar courses is saved and then administrators can apply that information to future events.

Event Type

The sort of event that is associated with a particular course. An event can have ILM, online, and classroom portions.

Expertise

The areas mastered by an instructor, which qualify the instructor to teach a particular course.

Extensible Markup Language (XML)

General mark up language that is used to share, store, and transport information among different systems. Using XML, you can setup the structure of a web document. Several options in ILM Administrator show results as XML documents.

External Test

An assessment that is part of an online or classroom course. External assessments are recorded in ILM Administrator.

Forum

An outlet for users and instructors to discuss topics. Discussions are conducted through forum topics and posted threads to the forum topics. Forums can also be used to share files among users.

Forward Only

An assessment option where users cannot go back to previously answered questions. Users can review their answers after the assessment is completed and scored, if the assessment question review options are enabled.

Globally Unique Identifier

A randomly generated string of characters. The GUID is used to uniquely identify all repository items, course, environment, and module pages.

GMT

See Greenwich Mean Time.

Greenwich Mean Time (GMT)

Greenwich, England has been the home of GMT since 1884. It is measured from the Greenwich Meridian Line at the Royal Observatory in Greenwich. It is used in ILM Administrator as a standard way of observing time stamps for user, course, and session activity.

GUID

See Globally Unique Identifier.

Hierarchy

A tree view that displays the levels of an organization in ILM, and how they relate to one another.

HTML

See Hypertext Markup Language.

Hypertext Markup Language (HTML)

Popular mark up 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.

Image Map Editor

A tool where users can create "hot spots" on an image, which you can format as multiple links. Image maps can link to course pages, external websites, repository items, and learning objects.

Infor Learning Management Administrator

ILM web-based application used to manage ILM users, courses, curricula, certifications, and system information from any workstation with access to the Internet or your company's intranet.

Infor Learning Management Content Creator

ILM authoring tool that organizations use to rapidly create, edit, and manage interactive knowledge content formatted in shareable learning objects.

Infor Learning Management Learner

The component used to access ILM and online courses.

Infor Learning Management Portal

The web page through which users access all ILM systems - Administrator, Learner, and Content Creator. Users use the portal to view their transcripts and register, purchase, and launch courses.

Infor Learning Management Course

A learning program with text, graphics, and animations to train your users. A course typically consists of 3 main parts: environments, modules, and pages. Environments contain the modules which contain pages that include the text and graphics. Users view ILM courses in the Learner window.

Instructor

Users who facilitate live classroom training.

Key

A place holder for pre-determined text that is stored in the ILM database.

Knowledge Gap

The difference between the passing score and the actual score earned by a user for a particular skill or assessment.

LCID

See Locale Identifier.

Level 2 Specific

The term given to style sheets, learning objects, and repository items, such as graphics, documents, animations, media, and flash templates, to indicate that they are available to authors who have rights in the same Level 2.

Level 2 Specific LO

A right given to authors so they can make, add, and edit learning objects that can be shared across all of the courses within the same Level 2.

Level Course Credit

Credits that users of a specific level can use to purchase courses without exchanging any money. These credits work like a store credit. The credit is created with a fixed number of credits, which can be distributed among multiple courses. When users of the level purchase the course, they are asked for a credit code. The users specify the credit code, and then the course is added to their course list. As users spend the credit, the value decreases until it is depleted.

Live Server

The server used to deploy and present courses to users.

LO

Learning Object. A reusable module. It can be used as a non-assessment module that is displayed as part of the course tree view. It can also be used to provide additional information to the user, and can be displayed after a user answers an interactive question incorrectly or clicks a link. The latter is referred to as a Special Path.

Load Balancing

Use of multiple web servers to support a single ILM site. This lightens the load on the servers, and therefore server reliability is increased.

Locale Identifier (LCID)

Four digit number that is generated by Microsoft to represent the various languages of the world. LCID’s are for translation purposes.

Localization

Translation of strings, courses, and interfaces.

Login Name

The name a user specifies to access ILM.

Menu Filter

A list used by administrators to manage information in ILM Administrator. The menu filter is broken into nine categories, which are broken down even further. This is the area where you do things in Administrator.

Merge Wizard

A tool used to merge duplicate users into one single user for easier data management. You can also merge all current and past user profile data and user training data within ILM.

Module

A section of a course. A module has one or more pages. A module is part of an environment.

Multi-rater Assessment

Evaluations that are based on observations of user's skills by a user's managers and peers. A single user can be assessed by multiple individuals, and these assessors do not need to be in ILM. Multi-rated assessments are used to evaluate users.

Notification

E-mails sent to users to inform them about registration, enrollment, cancellation, and recertification for courses, curricula, and certifications. Notification options are managed in the System section of the Menu Filter in ILM Administrator.

Online Course

A third-party online course. These courses are accessed through the portal. The main difference is that the course is created using an application other than Content Creator. These courses are AICC and SCORM compliant.

Outside Credit

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

Page

A course page with text and graphics. This is the smallest unit of a course. A Page is within a Module.

Page Template

Backgrounds that are created in Content Creator, and can be applied to pages in other courses. Page templates are HTML pages, and thus repository items.

Passing Score

The minimum score a user must earn to satisfy the requirements of a course, assessment, or skill.

Permission Group

Groups of rights, which can be assigned to groups of administrators. Assigning rights in groups speeds up the process of assigning rights to administrators, and helps keep the process of assigning rights more consistent.

Popup Editor

Used by authors to create the settings for windows that are displayed for learning objects, links, and repository items. Authors can determine the window size, title, position, content, and the window in which it is displayed. Authors can also enable close and print buttons, the scrollbar, location bar, menu bar, tool bar, and whether it will open in a new window.

Portal Default

The main portal, which users go to, when they are not assigned to another portal.

Portal Selector

Item list where users can select the portal they want to visit. The portal selector is only available for users that have been assigned to more than one portal.

Post Assessment

A test given at the conclusion of a course. Post Assessments are used to measure the information a user has learned from a course. These tests may be used to determine whether or not a user has passed the course.

Post Assessment Score

The score a user earns on a test that is completed at the conclusion of a course. This score may indicate whether or not the user has passed the course. It can also indicate a user’s eligibility to move onto the next course in the curriculum.

Pre Assessment

A test completed at the beginning of a course. Pre assessments are used to determine a user's level of knowledge before the begin the course. If the course is designed with the roadmap feature, the user may be able to "test out" of some modules of the course, based on their pre assessment results.

Pre Assessment Score

The score a user earns on a test that is completed at the beginning of a course. This score may be used to determine the topics that a user must learn.

Prerequisite

Requirement a user must satisfy before they can begin a course.

Profile

A user’s name and password that is used to determine the user’s settings and rights in a server.

Public

A shared Ad Hoc Report that can be assigned to users in the portal.

Publish

Send a course from the Content Creator application to a server either for users to view or authors to view and edit. Author's can publish courses to either the Edit or the View (Live) server. When a course is published to the Edit server, it is MOVED from the author's hard drive to the Server. When it is published to the Live server, a copy of the course is sent to the server while leaving the course open in Content Creator.

Question Pooling

The grouping of similar questions. After question pools are created, assessment options can be set to have questions chosen at random from these pools.

Question Weight

The value given to a question within an assessment or set of questions. Questions are weighted to reflect their great or minor importance. The higher weight a question is given, the greater impact it will have on the user’s score.

Report Designer

Tool used to design Ad Hoc Reports in ILM Administrator.

Repository

A listing of images, documents, Adobe Flash, and multimedia files. Authors use the repository to manage the media elements in their courses. There is a repository for Content Creator and a separate repository for ILM Administrator. The repository for ILM Administrator contains all the files needed for portal customizations and data for notification configurations.

Rich Text Format (RTF)

A common document format that is compatible with most word processors. Administrators can export Ad Hoc Reports to RTF.

Roadmap

The feature of the ILM Learner where users can “test-out” of parts of a course by completing a pre or post assessment. Users complete the assessment, and then click Roadmap to remove the modules from which they have "tested out".

Rollover

A visual effect that results when a user pauses on an image and a different image is displayed.

Room Item List

An inventory of the items found in a classroom. These lists are helpful in determining the classroom that best fits a course’s needs.

Rooms

The physical location where a classroom course is held.

RTF

See Rich Text Format.

Schedule Course Wizard

A tool that administrators use to complete the process of scheduling a course from beginning to end. The Course Schedule Wizard consists of six section tabs, with a total of 11 steps to be completed by the administrator.

Score

The percentage of correct answers that a user has earned on an assessment.

SCORM

See Shareable Content Object Reference Model.

Seamless Login

An option where credentials are passed into the ILM system, through a link, to log users into ILM without the need to re-enter their usernames and passwords.

Self-Registration

An option where users can register themselves for a course event in the portal.

Server

The computer system where the ILM server is located. There are two separate ILM servers to facilitate content development and delivery to users: Edit Server and View (Live) Server.

Session

1) A user's visit to ILM or a course in ILM Learner. Session reports refer to these sorts of sessions. 2) An occurrence of a classroom course. Classroom courses can have a single or multiple sessions.

Shareable Content Object Reference Model (SCORM)

The industry standard. The central focus of SCORM is to enable sharing of SCORM – compliant content across different Learning Management Systems to accommodate different learner requirements. In ILM Administrator you can export ILM courses to SCORM v.1.2 compliant SCO's.

Short Name

An identification or code for a course. A course’s short name is not displayed to users.

Skill

An ability or characteristic that is required for a position. The acquisition of particular skills determines a user's training needs and the courses that he or she will take.

SQL

A database computer language that is used to manage and retrieve data from a database. Administrators can use the report designer to view ad hoc reports in SQL mode.

Status

A user’s status in ILM. A user can be active or inactive.

Style

A combination of reusable font sizes, background images, and other elements that authors can apply to any course, environment, module, or individual.

Survey

ILM forms used to collect data. Surveys may have multiple choice, multiple-multiple choice, or open-ended essay questions. A survey question differs from an evaluation question, in that you can elicit an open-ended response such as an “essay” entry. Surveys do not have response sets like evaluation questions do.

Synchronization

Used by authors to share repository items, style sheets, and learning objects with other authors. Through the synchronization features, authors can upload their items, and download items from other authors.

System Wide

A right given to authors so they can add and edit repository items and style sheets that can be shared with all authors in the system.

System Wide LO

A right given to authors so they can create, add, edit, and delete learning objects in the system.

Theme

The appearance of the ILM Leaner interface. Themes can be added by uploading the files in ILM Administrator.

Tokens

Shortcuts for information that is extracted from the ILM database and incorporated onto a page. Pre-defined tokens can be inserted where you would like different text to be dynamically generated on the page. Some tokens are only available for customizing the score page.

Transcript

Record of a user's learning data. The transcript can be accessed in the portal.

Tree View

An outline view of all the environments, modules, and pages in a course. Users click Tree View in ILM Learner to show and hide the tree view.

Unique User ID

A code used to identify a user in ILM Management.

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.

User Name

The name a user specified to sign in to ILM.

User Sync

A tool that administrators use to add, delete, and update large numbers of users from a file to ILM.

Users

Learners and administrators who access ILM. Most users merely undergo course training. Although some users also maintain courses. This depends on their assigned rights.

Value

A key’s translation in a particular language, in the portal content search.

View Server

The ILM server that users access. Organizational Hierarchy, Facilities Hierarchy, course evaluations, curricula, certifications, class room instructor profiles, classroom based course scheduling, and user accounts should be set up on the View server.

Weighted Score

The calculated score based on weighted questions.

What You See Is What You Get (WYSIWYG)

Describes an application with an editing page that closely resembles the final product. WYSIWYG applications are used to format and move objects around the page instead of modifying advanced code.

WYSIWYG

See What You See Is What You Get.

XML

See Extensible Markup Language.