Infor Learning Management System Portal Designer Guide

Release 9.1

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Contents

About this guide

This guide provides information for the Infor Learning Management Portal.

Portal is a component of the Infor Learning Management system. Use this guide to learn about the portal and its functions.

The Infor Learning Management Portal is the gateway to the Infor Learning Management system. Your organization has structured a completely personalized learning program for you.

Because the portal is configurable, the pages or icons that are shown in this guide may differ from your company's portal. Additionally, certain options and items described in this guide may or may not be available based on your organization's policies and your role in the Infor Learning Management system.

Intended audience

This guide is intended for content authors, instructors, managers, and users who need to work with or complete training programs. This document is not intended for those who need to perform administrative tasks in Infor Learning Management, such as changing the permissions rights of users or assigning training content to users. This guide explains how content authors can provide course content through the Infor Learning Management Portal, but does not explain how to develop the course content.

Prerequisite knowledge

There is no prerequisite knowledge required for this document.

Related documents

These documents are related to this guide and focus on other components of Infor Infor Learning Management:

- *Infor Learning Management System Administrator User Guide*
- *Infor Learning Management Content Creator CE User Guide*
- *Infor Learning Management Portal User Guide*
- *Infor Learning Management Release Notes*
- *Infor Learning Management Resolved Issues*
- *Infor Learning Management System Requirements*

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at https://concierge.infor.com/ and create a support incident.

The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

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Chapter 1: Overview

The Infor Learning Management Portal is used to access the personalized learning program that your company has structured for you in Infor Learning Management. These are examples of tasks you may perform within your personalized portal:

- Register and launch e-learning courses
- Register and track instructor-led training sessions
- Complete curricula and certification programs
- Take online evaluations and surveys
- View your instructor-led training calendar, training history, and achieved certifications
- Run, print, and export reports
- View and track e-Meetings

Depending upon your company's configuration of Infor Learning Management Portal, the fields and screens that are described in this guide may differ from your portal.

Obtaining sign on credentials for ILM Portal

You may skip this section if your organization has SSO enabled and does not require you to have a separate account for the learning system.

In all other cases, to access the Infor Learning Management Portal, you must sign in with your assigned login name and password. Your system administrator can create an account for you or you can create your own account on the sign in page.

Creating an account

If you have not been assigned a sign in name and a password, then you can create your own user account. You can use New Users Register Here to begin the self-registration process.

Depending on the way your Infor Learning Management system administrator has configured the sign in page, you may not be able to self-enroll. In this case, your manager or Infor Learning Management system administrator must provide you with your log-on credentials.

To register:

1. Specify your portal URL in your browser window and press **Enter**.
2. Click New Users Register Here.
3. Specify your Login Name, Password, Name, Email, and the following information.

   Digits
   Specify the number that is displayed in the security image.

   Level
   Select the registration level for your user group. After you select a level, additional levels may be displayed. Continue to select the appropriate level. If you have any questions or concerns about which level to select, contact your manager or Infor Learning Management system administrator.

4. Click **Next**.
5. Specify your personal information in the provided fields.
6. Click **Submit**.

Resetting a password

If you forget your password, you can use the **Forgot Password** page to request an email with a temporary password. You can use the temporary password to sign in and create a new password.

To reset a password:

1. Click Forgot Password?.
2. Specify your login name or email address.
3. Click **Submit**. Within 15 minutes you will receive an email with a temporary password that you can use to sign in and create a new password.

Selecting a portal

Your organization may have configured different access points for different business units, divisions, and departments. If your Infor Learning Management user account is associated with multiple Infor Learning Management Portals, then a **Portal Selector** page is displayed immediately after you log on.

Although the look and feel and available options may be different between Infor Learning Management Portals, your content such as learning activities, training history, and certifications, are shared across all Infor Learning Management Portals.

To select a portal:

1. Select a portal from the **Choose Portal** item list.
2. Click **Go**.

Chapter 2: Navigation

The Infor Learning Management Portal is divided into category tabs and menu options. The menu options are updated depending on the selected category tab.

Chapter 3: User role views

You can switch between user roles to access each view. If you made any design changes, you need to switch to that role to view the changes.

Chapter 4: Configuring portal

You can customize the way the portal looks, such as change colors and add company logo, on the **Configure Portal** screen.

To configure portal:

1. Select **Designer > Configure Portal**.
2. To add a custom logo, which is displayed in place of the default Infor logo, specify the URL for the logo image or select a logo file by clicking the **Browse** icon. It is recommended to use smaller images with lower resolution for the logo files. Larger images may increase page loading time.

   Note: The default logo size is 36x36 px. The logo width can be increased up to 150px, the logo height cannot be changed. The same logo is displayed at the top and bottom of the page. SVG is the recommended file format for the logo image due to better scaling on multiple platforms.
3. To customize top bar, title bar, left menu, various interface items, and search bar background, font, and mouseover colors and opacity, select a color from the swatches dropdown list, or specify a custom color. Specify the opacity between 0 and 100 next to each color selection.
4. If Ming.le is enabled, select **Ming.le Enabled**.
5. Click **Save**.

   Reload the page to see changes.

Chapter 5: Configuring templates

1. Select **Designer > Configure Templates**.
2. To see a page preview, select the template and click **Show Preview**.

   Preview is updated in real time. You do not need to save the template to preview the changes.
3. To customize the **Login** template:
   a. Select **Login** from the template dropdown list.
   b. If using a background image, specify the image URL. Otherwise, select the background color from the swatches dropdown list or specify a custom color. Specify the opacity between 0 and 100.
   c. For the **User Input Section**, specify alignment, background color and opacity, login button label color, login button background color, registration button label color, and registration button background color.
   d. Specify **Company Logo** URL, **Company Title**, and select the **Title Color** or specify a custom color.
   e. Click **Save**.
4. To customize the **Logout** template:
   a. Select **Logout** from the template dropdown list.
   b. If using a background image, specify the image URL. Otherwise, select the background color from the swatches dropdown list or specify a custom color. Specify the opacity between 0 and 100.
   c. For the **Content Section**, specify the alignment.
   d. Specify **Company Logo** URL, and page message.
   e. Click **Save**.
5. To customize the **Forgot Password** template:
   a. Select **Forgot Password** from the template dropdown list.
   b. If using a background image, specify the image URL. Otherwise, select the background color from the swatches dropdown list or specify a custom color. Specify the opacity between 0 and 100.
   c. For the **User Input Section**, specify alignment, background color and opacity, submit button label color, submit button background color, go back button label color, and go back button background color.
   d. Specify **Company Logo** URL and **Page Message**.
   e. Click **Save**.
6. To customize the **Force Change Password** template:
   a. Select **Force Change Password** from the template dropdown list.

- b If using a background image, specify the image URL. Otherwise, select the background color from the swatches dropdown list or specify a custom color. Specify the opacity between 0 and 100.
- c For the **User Input Section**, specify alignment, background color and opacity, login button label color, and login button background color.
- d Specify **Company Logo** URL and **Page Message**.
- e Click **Save**.

7 To customize the **Portal Selection** template:

- a Select **Force Change Password** from the template dropdown list.
- b If using a background image, specify the image URL. Otherwise, select the background color from the swatches dropdown list or specify a custom color. Specify the opacity between 0 and 100.
- c For the **Content Section**, specify alignment, background color and opacity, login button label color, and login button background color.
- d Specify **Company Logo** URL and **Page Message**.
- e Click **Save**.

8 To customize the **New User** template:

- a Select **New User** from the template dropdown list.
- b If using a background image, specify the image URL. Otherwise, select the background color from the swatches dropdown list or specify a custom color. Specify the opacity between 0 and 100.
- c For the **User Input Section**, specify alignment, background color and opacity, button label color, and button background color.
- d Specify **Company Logo** URL.
- e Click **Save**.

9 To edit the template HTML code, enable the **HTML Mode (Advanced Users)** option.

Chapter 6: Configuring dashboard

You can customize learner dashboard widgets on the **Configure Dashboard** screen.

To customize dashboard:

1. Select **Designer > Configure Dashboard**.
2. To add a widget:
   a. Select a user role to view the dashboard options. Widget types vary based on the selected role. See Dashboard widget types on page 13 for more information.
   b. Click **Add Widget.**
   c. Specify a widget name.
      This is the name displayed in the title bar of the widget and it is visible to learners.
   d. Select a widget type..
   e. Select whether to stretch the widget to full width on desktop and tablet screens.
   f. Specify widget options.
   g. Click **Save**.
3. To modify an existing widget:
   a. Select a widget from the list.
   b. Make the changes and click **Save**.
4. To reorder the existing widgets, click **Reorder**, drag and drop the widgets into desired positions and click **Save Order.**. To discard the reordering, click **Reset Order**.

Dashboard widget types

Widget	Description	Availability
Ad Hoc Reports	A simple or dashboard-type shared ad hoc report view. Select **Simple** to display a single report, then select the report from the dropdown list. Select **Dashboard** to display a shared dashboard, then select the dashboard from the dropdown list.	Learner Manager Instructor Administrator Author

Widget	Description	Availability
Announcements	A Rich Text Format widget. Use this widget to display scheduled announcements to users. You can specify a locale and create an announcement in the language of that locale. The content will be automatically loaded based on the user's locale. If no translated content is available, the default locale (United States - English) announcement is loaded. In HTML mode, you can add a token `#LCID#` in any URL while editing content of Announcement widget to specify the locale.	Learner Manager Instructor Administrator Author
Certification Snapshot	A snapshot view of top three certificates listed in alphabetical order.	Learner
Course Snapshot	A snapshot view of top three courses listed in alphabetical order. Select which course status to display: • Not Started • In Progress • Credit Pending • Failed • Passed Select which course type to display: • Online • Classrom • Blended	Learner
Course Statistics	A pie chart view of user courses based on course status: Not Started, In Progress, Passed, Failed.	Learner
Team Snapshot	A snapshot view of top three team members and their course progress listed in alphabetical order.	Manager

Chapter 7: Configuring pages

You can customize individual page availability and display order to users on the **Configure Pages** screen. Refer to corresponding topics in this chapter to customize pages that require further role-specific customizations..

Note: Pages must be reloaded to view changes.

1 Select **Designer > Configure Pages**.

2 To customize menu modes (device- and role-based view):

   a Select the user role in the tree view.

   b Select the menu mode for each device type. It is recommended to select more compact display options for smaller devices, such as mobile phones and tablets.

   - **Icon only**. Select to display only the category icon in the menu.
   - **Text next to the icon**. Select to display the category name next to category icon.
   - **Text under the icon**. Select to display the category name under the category icon.

   c For users with Administrator role, select **Default display type**, **Level Tree**, and **Level Breadcrumbs**.

   d Click **Save**.

3 To customize the page name and availability to users:

   a Select the page in the tree view.

   b Specify the page name.

   Note: The page name can be specified in two ways: hard-coded, if you simply specify the name, or via using the strings. The advantage of using strings is being able to utilize locales and having the page name automatically displayed in the user's language.

   Use this format to specify a string `$L{your_string_name}`. The default option is the system default string name for that page and it can be found one the **Configure Strings** page. You can use the existing string or create a new string.

   See Configuring strings for more information.

   c Select whether the page is available to users by selecting or clearing the **Display this page in application menu** check box.

   d Click **Save**.

4 To specify the page locale, add a `#LCID#` token in the External URL field when adding or editing an external page to automatically display the interface in the user's language.

5 To customize a linked external page:

   a Select the page in the tree view.

b Specify the page name, external URL, and URL Suffix. URL Suffixes are parts of a URL delimited by slashes. In this case you are entering the suffix for the linked page. Only lower case letters, numbers, hyphens, and underscores can be used.

Note: To display the external page based on the user's locale, add the token `#LCID#` in the **External URL** field following the URL. After the link is clicked, the UI is displayed in the user's selected UI language and token is replaced by the UI language name.

c Click **Save**.

6 To change the page order in the menu, click **Reorder**, change the page order using the arrows, and click **Save**. To undo or cancel the re-ordering, click **Reset Order**.

Configuring pages for learners

You can customize individual page design and availability to learners on the **Configure Pages** screen. The pages mentioned in this section are specific only to learners.

Note: Pages must be reloaded to view changes.

1 Select **Designer > Configure Pages > Learner**.

2 To customize the **Courses** page:

a Select **Courses** in the tree view.

b Select which **Status** filter options are visible and selected by default.

c Select which **Course Type** filter options are visible and selected by default.

d Select **Sort Options** order and visible options.

e Select **Additional Fields** and display style.

f Select **Enable Advanced Filter** to enable the advanced filter view.

g Click **Save**.

3 To customize the **Course Details** page:

a Select **Learner > Courses > Course Details** in the tree view.

b Select which **Dynamic Fields** are visible.

c Specify **Event Options** settings:

Sort Order
Specify the default event sort order.

Visible Options
Specify which sort options are available to learners.

My Events List
Select if you want the list to be **Collapsed** or **Expanded** by default.

Available Events
Select if you want the list to be **Collapsed** or **Expanded** by default.

d Select **Filter Options** to determine which events are displayed to learners.

e Select **Event Enrollment Settings**.

f Click **Save**.

4 To customize the **Certification Programs** page:

a Select **Learner > Certification Programs** in the tree view.
b Select which **Filters** options are visible and pre-selected by default.
c Select **Sort Options** order and visibility.
d Click **Save**.

5 To customize the **Curricula** page:

a Select **Learner > Curricula** in the tree view.
b Select which **Filters - Status** options are visible and pre-selected by default.
c Select **Sort Options** order and visibility.
d Click **Save**.

6 To customize the **Resources** page:

a Select **Learner > Resources** in the tree view.
b Select which **Filters - Status** options are visible and pre-selected by default.
c Select **Sort Options** order and visibility.
d Select **Additional Fields** and display style
e Select **Enable Advanced Filter** to enable the advanced filter view.
f Click **Save**.

7 To customize the **Catalogs** page:

a Select **Learner > Catalogs** in the tree view.
b Select which **Filter - Status** options are visible and pre-selected by default.
c Select **Sort Options** order and visibility.
d Select **Additional Fields** and display style.
e Select **Enable Advanced Filter** to enable the advanced filter view.
f Click **Save**.

8 To customize the **Calendar** page:

a Select **Learner > Calendar** in the tree view.
b To allow learners to create personal events in the calendar, select **Allow users to create personal events**.
c Select which **Filter - Status** options are visible and pre-selected by default.
d To hide all available courses, select **Hide all available courses**. If selected, the **Available** option is removed from the status filters.
e Click **Save**.

9 To customize the **Transcript** page:

a Select **Learner > Transcript** in the tree view.
b Specify the page **Title**.
c Select to **Use current portal logo** or to **Upload a new logo** and select a new logo.
d Select a **Header Style**.
e Select which learner details to display from the **Show Options** list.
f Specify the section **Display Order**.
g Specify the title, background and opacity, and font color and opacity for each transcript section.
h Select **Available Fields**, **Sort By** field, and **Sort Order**.

- i To show a section, select **Show Section**.
- j (Courses and Certificates sections only) To show a section icon, select **Show Icon**.
- k (Courses and Continuing Education Credits sections only) To display courses that are inactive, select **Show inactive courses** .
- l Click **Save**.

10 To customize **My Profile** page:

- a **Learner > My Profile** in the tree view.
- b If you want users to be able to update their profile picture, select **Allow users to update their profile picture**
- c Select the fields to display on the profile page and if the fields are required, read-only, or optional.

Configuring pages for managers

You can customize individual page design and availability to managers on the **Configure Pages** screen. The pages mentioned in this section are specific only to managers.

Note: Pages must be reloaded to view changes.

1 Select **Designer > Configure Pages > Manager**.

2 To customize the **My Team** page:

- a Select **Manager > My Team** in the tree view.
- b Select **Sort Options** order and visibility.
- c Select **Additional Fields** and display style
- d Select **Enable Advanced Filter** to enable the advanced filter view.
- e Click **Save**.

3 To customize the **Course Details** page:

- a Select **Manager > My Team > Employee Details > Courses > Course Details** in the tree view.
- b Specify **Event Options** settings:

  Sort Order
  Specify the default event sort order.

  Visible Options
  Specify which sort options are available to managers.

- c Click **Save**.

Configuring pages for instructors

You can customize individual page design and availability to instructors on the **Configure Pages** screen. The pages mentioned in this section are specific only to instructors.

Note: Pages must be reloaded to view changes.

1 Select **Designer > Configure Pages > Instructor**.
2 To customize the **Courses** page:
   a Select **Courses** in the tree view.
   b Select **Sort Options** order and visible options.
   c Select **Additional Fields** and display style.
   d Select **Enable Advanced Filter** to enable the advanced filter view.
   e Click **Save**.

Configuring pages for administrators

You can customize individual page design and availability to administrators on the **Configure Pages** screen. The pages mentioned in this section are specific only to administrators.

Note: Pages must be reloaded to view changes.

1 Select **Designer > Configure Pages > Administrator**.
2 To customize the **Users** page:
   a Select **Users** in the tree view.
   b Specify **Sort Options** settings:

      Sort Order
      Specify the default event sort order.

      Visible Options
      Specify which sort options are available to learners.

   c Select which **Filter Fields** are visible.
   d Select **Enable Advanced Filter** to enable the advanced filter view.
   e Select if you want to **Display administrators assigned only to the current level** or to **Display administrators assigned to the current level and all parent levels**.
   f Click **Save**.
3 To customize the **Courses** page:
   a Select **Courses** in the tree view.
   a Select which **Filter Fields** are visible.
   b Select **Enable Advanced Filter** to enable the advanced filter view.
   c Click **Save**.

Chapter 8: Configuring features

You can customize portal features on the **Configure Features** page.

To customize features:

1. Select **Designer > Configure Features**.
2. To customize new event indicator:
   a. Select if the new event indicator is for both courses and events, only courses, or not shown.
   b. If event indicator is shown, specify background color, font color, and indicator text.
   c. Click **Save**.
      Reload the page to see changes.
3. Select **Course Features**.
4. Select **Certification Features**.
5. Select **Curriculum Features**.
6. Select **Resource Features**.
7. Select **Catalog Features**.
8. Click **Save**.
   Reload the page to see changes.

Chapter 9: Managing portal repository

Portal repository is used for storing portal configuration files, images, and templates.

1. Select **Designer > Manage Portal Repository**.
2. To upload a file, select the folder in which the file will be located and click **Browse**, select the file to upload, and then click **Upload**.
3. Use the folder navigation arrows, **Open Folder**, **Refresh**, **Create New Folder**, and **Delete** icons for their corresponding actions.

Chapter 10: Configuring user access restriction

Use **User Access Restriction** to create schedules allowing or denying specified users access the system.

1. Select **Designer > User Access Restriction**.
2. Select **Enable User Access Restriction** to enable the user access restriction schedules.
3. Click the **Audience** tab to specify to which users the restriction schedule will be applied.
   a. Add the restriction criteria field.
   b. Specify the field match condition.
   c. To view the user list and count of the users that match the specified criteria, click **View Users**.
4. Click the **Schedule** tab to define the restriction schedule.
   a. Select the schedule time zone or select **Use user's time zone** to use the user's time zone instead.

      Note: Schedule restriction can be bypassed if the users manually adjusting their device time zone.
   b. Click **Add Restriction Rule**.
   c. Specify this information:

      Access
      Select to **Allow** or **Deny** access.

      Time
      Select **All Day** or specify the **From** and **To** hours.

      Day
      Select to which days to apply the schedule:

      Always
      Select this option to apply the schedule every day.

      Specific Days of the Week
      Select this option to apply the schedule only to specific days of the week and select the days.

      Date Range
      Select this option to apply the schedule during a specific date range and specify the range.
5. Click the **Appearance** tab to define the restriction page appearance.
   a. Specify this information:

Background Image
Specify the background image file URL.

Background Color and Opacity
Specify the background color and opacity.

Logo
Specify the logo file URL.

Use Custom Message
Select this option to replace the default system message with a custom message and specify the language locale and the message.

Chapter 11: Configuring acknowledgment page

Use the acknowledgment page to display an important system message based on a set frequency.

1. Select **Designer > Acknowledgment Page**.
2. Select **Enable Acknowledgment Page** to display the acknowledgment page upon user login.
3. Click the **Audience** tab to specify to which users the acknowledgment page will be displayed.
   a. Add the criteria field.
   b. Specify the field match condition.
   c. To view the user list and count of the users that match the specified criteria, click **View Users**.
4. Click the **Display Options** tab to specify when the acknowledgment page is displayed.
   a. Select the **Frequency** type.

      Recurrence Pattern
      Select this option to repeat displaying the acknowledgment page at specified intervals and then select the pattern.

      Display on every login
      Select this option to display the acknowledgment page on every user login. Select **No end date** to display the page indefinitely or specify the date range.

5. Click the **Appearance** tab to define the restriction page appearance.
   a. Specify this information:

      Background Image
      Specify the background image file URL.

      Background Color and Opacity
      Specify the background color and opacity.

      Logo
      Specify the logo file URL.

   b. Specify **Affirmative Action Button** text, text color, and background color.
   c. Specify **Dismissive Action Button** text, text color, and background color.
   d. Specify **Neutral Action Button** text, text color, and background color.
   e. To hide the neutral action button, select **Hide Neutral Action Button**
   f. To allow users to bypass the acknowledgment page, select **Allow users to bypass the acknowledgment page**
   g. Select the language **Locale**.
   h. To restore the default configuration settings, click **Restore Default Settings**.