skillsoft percipio

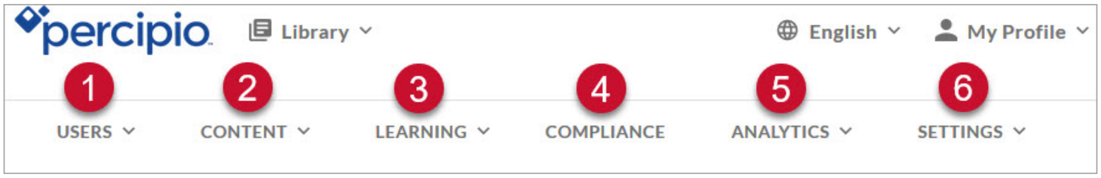
User Guide

For Admins

Contents

Percipio for Administrators

The administrative menu allows you to manage your users' experience using Percipio. When you sign in as an admin, you see the administrative menu including the following choices.



Note: Not all menu options display to all Percipio admins. For more information, see User Roles.

1. **Users**: In Users, you can create a new user, manage audiences, and create user attributes to define your user hierarchy.
2. **Content**: The Content menu provides you access to create custom linked content and custom channels for your organization, and access to Licenses, where you control access to content by managing license pools and audience associations.
3. **Learning**: Access Assignments and Content Promotions.
4. **Compliance**: Appears for Compliance administrators. If your organization has access to Percipio Compliance and you have Compliance administrator privileges, you can use Percipio in combination with Compliance Administrator to manage all aspects of your learners' Compliance training.
5. **Analytics**: Provides you access to Dashboards and Reports. Dashboards provide metrics related to user activity within Percipio and the status of key operational functions. Reports provide several views of operational data that help you analyze activity within Percipio.

6. **Settings**: Configure technical aspects of Percipio by managing system settings.

Set up your Percipio site

Access the Admin Training home page for step-by-step procedures and additional details.

Prior to making Percipio available to your learners, configure it to meet your organization's business needs. Developing an initial plan for managing your licenses, assignments, user organization, and reporting is crucial to implementing an effective learning strategy for your organization.

To set up your site

1. Review the system requirements.
2. Brand your site.

   Use the Site Configuration page to set course completions and features, and use site branding to customize your Percipio interface.

   Watch Tutorial

3. Confirm your license pools.

   Ensure you have access to the necessary license pools, so that the content you want to work with is available.

4. Create user attributes.

   Decide how you want to define the user hierarchy in your organization by creating the necessary descriptive attributes.

   Watch Tutorial

5. Create audiences.

   Place users into logical groups to manage the allocation of licenses and content assignments.

Watch Tutorial

6. Distribute licenses to audiences by making associations.

   Make content available to your users by associating your audiences with the correct license pools.

   Watch Tutorial

7. Create and manage your user accounts.

   Create a new user, or import users by batch. Review the user login experience so you can configure your user accounts and emails.

   Watch Tutorial

8. Manage your learners' Percipio-generated emails.

   Increase your learner engagement using Percipio's automatically-generated emails.

9. Create a new assignment for your audiences.

10. Assigned content displays on the learner's Percipio home page, as well as the Assignments page.

    Watch Tutorial

11. Become familiar with the dashboards and reports.

    Dashboards and reports contain metrics related to user activity and key operational functions within Percipio.

    Watch Tutorial

12. Customize your Percipio library for your organization.

    Create custom areas, custom subjects, custom channels, and custom journeys.

    Watch Tutorial

13. Upload and manage your custom content and instructor-led training.

    Add custom content in the form of SCORM/AICC, links, web pages, or document types.

    Watch Tutorial

    Add instructor-led training.

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14. If your organization has access to Percipio Compliance, and you have Compliance administrator privileges, you can use Percipio in combination with Compliance Administrator to manage all aspects of your learners' Compliance training.

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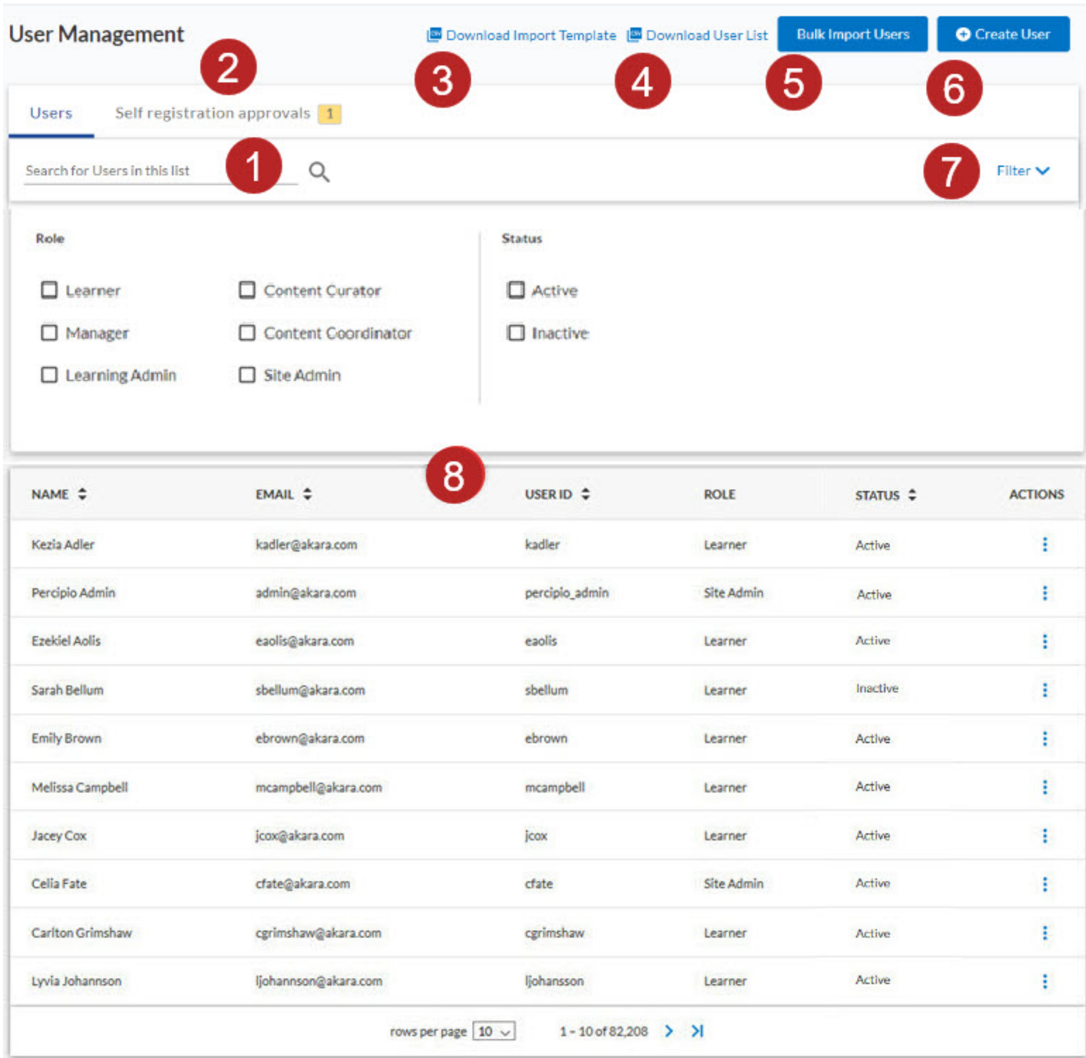
User Management

One of the most important admin functions within Percipio is managing your user community.

To get started, select **Users**, then **User Management**.

You see two tabs:

- **Users:** The list populates with data that you entered when you created a new user, bulk imported users, or used SAML integration (contact your Skillsoft representative to configure this third option). The list displays sorted by last name, followed by first name. If you have a user role of learning admin or manager, you only see users who are in an audience you own.
- **Self Registration:** This list shows all those users who self registered. It also shows any pending requests.



1. **Search for Users:** Enter text to find a specific user in your list. The search returns users based on the name, email, and/or User ID fields. Use the filters to narrow your search.
2. **Self Registration:** Shows all users who self registered and any that are waiting approval.
3. **Download Import Template:** A blank CSV template file containing only column headers, used to bulk import new users into Percipio.
4. **Download User List:** A populated CSV template file that includes a comprehensive list of all user accounts and their associated profile data. Use this file to make changes and updates to multiple user profiles, then

update existing users by bulk import into Percipio. Open the file in a program like Microsoft Excel to manipulate the data, or upload the file into another business system.

5. **Bulk Import Users**: Click to bulk import new users.
6. **Create User**: Click to create a new user.
7. **Filter**: Click to see options for filtering the user list by role and status.
8. **User list**: A list of Percipio users in your organization or in audiences you own. You can sort the list alphabetically by name, email, User ID, or status. If available to you, use the Action column to edit user details.

User Roles

User roles determine what level of access you have in Percipio. There are eight roles available in Percipio, one for learners and seven for administrators. Two of the seven admin roles are custom roles defined by you.

All roles have access to the learning content in Percipio. The five administrative roles have a default set of permissions. For a chart showing each role's default permissions and permissions that can be customized see Permissions by Role. The custom roles behave like the learning admin role. To customize a role, see Role Customization.

Learners can only access Percipio for Learners. This is the default role for new users and cannot be customized.

Site Admins have access to all administrative features and functions. You cannot customize this role.

Learning Admins typically own one or more audiences.

- For each audience they own, they can view some reports and dashboards, as well as create, edit, and manage assignments.

- Typically, learning admins are higher-level executives or cross-functional leaders, such as a manager within a distributed learning and development department.
- You can customize this role.
- If you grant this role content management permissions, all content changes impact the entire Percipio site. This role can only assign content to audiences that they own.
- If you grant this role Live Course permissions, they can add live courses and classes, and add instructors within audiences that they own. They can also manage the roster for only learners that belong to audiences that they own, including registering learners to classes, and approving/denying registration requests.
- You can set up this role as a reporting only admin.

Managers typically own one audience that usually consists of their direct reports.

- Managers may own more than one audience. For each audience they own, they can view some reports and dashboards.
- You can customize this role.
- If you grant this role content management permissions, all content changes impact the entire Percipio site. This role can only assign content to audiences that they own.
- You can set up this role as a reporting only admin.

Content Curators customize learning content and manage their organization's library structure by creating custom areas, subjects, channels, and content. They can also view some reports and dashboards. You can customize this role.

Content Coordinators manage their organization's custom channels and custom content and have access to some reports. You can customize this role.

Instructor is not a role, but a privilege that can be assigned to any role by selecting the check box: **Assign live course instructor privilege** when creating a new user. Instructors can manage a class registration list, a waitlist, and scores for class participants.

Approval Manager is not a role, but a user attribute. When you create a new user and select an existing user as their approval manager, the existing user automatically becomes an approval manager. Approval managers can approve Live Course registrations.

Custom roles provide a way for you to configure up to two additional roles unique for your organization. For example, you might need a report-only admin or an ILT-only admin. By default, custom roles start with the default learning admin privileges. You can choose which privileges to allow for the custom role.

What's an audience owner?

An audience owner is a user with the role of Manager or Learning Admin assigned to one or more audiences. The Manager or Learning Admin can access analytics about how users in their audience engage with Percipio. Owners who are Learning Admins can also create, edit, and manage assignments for users in their audiences. When an owner is added to or removed from an audience, Percipio may send them an email notification.

Why can only users with the Manager or Learning Admin roles be audience owners?

By default, **Site Admins** already have access to the reports, dashboards, and assignments of all audiences.

Managers usually manage small teams. They can view some reports and dashboards for their audiences.

Learning Admins usually manage large teams. They can view the same reports and dashboards as Managers, and they can also manage assignments for their audiences.

Content Curators and **Content Coordinators** only manage content-related tasks in Percipio Admin.

What is the difference between the default roles of Manager and Learning Admin?

Managers can access some dashboards and reports for their audiences.

Learning Admins can access the same dashboards and reports for their audiences and have assignment privileges for their audiences.

What is the difference between the default roles of Content Coordinator and Content Curator?

Content Coordinators manage hosted custom content and custom channels.

Content Curators manage hosted custom content and custom channels and have library management privileges (custom areas and custom subjects).

How do I customize a role?

To customize a role, see Role Customization.

What Percipio roles can access administrative tasks of Percipio Compliance?

Any Percipio role can access administrative tasks in Percipio Compliance provided they have admin level access in Percipio

Compliance. Percipio Compliance admins can define security levels for the different Percipio roles, which gives users the ability to access different administrative tasks.

If a user with a role other than Percipio site admin needs to access the Percipio Compliance admin interface to perform their designated compliance admin tasks, they must:

1. From the Percipio profile drop-down, select **Compliance**.
2. From the Compliance profile drop-down, select **Administrative tasks**.

Permissions by Role

The tables below list the permissions available to each administrative role. An X indicates permissions that are on by default, and a C indicates that the permission can be customized for that role. To customize a role, see Role Customization. All default permissions can be turned off.

The **domain admin** role, a specific role for multi-site, has the same permissions as the site admin role plus specific multi-site management functions.

The **system integrator** role must be turned on by your Skillsoft account team. This role has limited admin capability – users, custom content, and reporting – but can access the System integration option from the Settings menu allowing the user to configure SAML, SFTP, and content imports and exports with other systems in their learning environment.

The **custom admin roles** use the default permissions of the learning admin role and have the same customization options as the learning admin role. You can configure the custom roles different from the learning admin role to create a unique role for your organization.

The lists are organized by the sections of the Percipio admin menu. Items bolded in blue correspond to options in the interface.

Note: If you change a user's role, the updated permissions show within minutes for the user without them having to log out.

User Management

Permission	Site Admin	Learning Admin + Custom roles	Manager	Content Curator	Content Coordinator
User management					
View users	x	c	c		
Create users	x	c	c		
Send a welcome email	x	c	c		
Edit users	x	c	c		
Import multiple users	x				
User attributes					
View user attributes	x	c			
Create and assign new user attributes	x				

Permission	Site Admin	Learning Admin + Custom roles	Manager	Content Curator	Content Coordinator
Audience management					
View audiences	x	c	c*Known issue: If you select this option, you must also select the privilege to either Manage Content or Manage Journeys*		
Create a new audience	x				
Edit an audience	x				
Add an audience owner to an existing audience	x				
Add a user to	x				

Permission	Site Admin	Learning Admin + Custom roles	Manager	Content Curator	Content Coordinator
an existing audience					
Associate a custom channel to an audience	x				
Delete an audience	x				
Create a Team Automation Rule	x				
Edit a Team Automation Rule	x				
Pause a Team Automation Rule	x				
Resume a Paused Team Automation Rule	x				

Content Management

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Manage content settings	x			x	c
Areas & subjects					
Manage library	x	c	c	x	c
Create a new custom area	x	c	c	x	c
Edit a custom area	x	c	c	x	c
Delete a custom area	x	c	c	x	c
Create a new custom subject	x	c	c	x	c
Edit a custom subject	x	c	c	x	c
Delete a custom subject	x	c	c	x	c
Channels and Content Items (Hosted SCORM/AICC, Files, External links)					
Manage content	x	c	c	x	x
Copy a single-	x	c	c	x	x

Permission	Site Admin	Learn-ing Admin	Man-ager	Con-tent Cur-ator	Content Coordin-ator
view channel					
Edit a single-view custom channel	x	c	c	x	x
Copy a multi-view channel	x	c	c	x	x
Edit a multi-view channel	x	c	c	x	x
Add a language view	x	c	c	x	x
Retire a custom channel	x	c	c	x	x
Upload a SCORM or AICC package	x	c	c	x	x
Edit the SCORM or AICC package	x	c	c	x	x
Edit a package's player behavior	x	c	c	x	x
Replace a SCORM orAICC pac-kage	x	c	c	x	x
Retire a hosted	x	c	c	x	x

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
file					
Upload a single file	x	c	c	x	x
Edit the single file's details	x	c	c	x	x
Replace a hosted file	x	c	c	x	x
Retire a hosted file	x	c	c	x	x
Create external links	x	c	c	x	x
Edit external links	x	c	c	x	x
Retire an external link	x	c	c	x	x
Journeys					
Manage journeys (this includes creating, editing, copying and retiring)	x	c	c	x	x*Content coordinators can only save as draft and not select an audience.*

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Live Course (ILT)					
Manage ILT Courses	x	c	c	x	x
Manage roster *Note: learner role with instructor privileges can also manage roster*	x	*x with instructor privileges*	*x with instructor privileges*	x	x
Content Reports					
Managed retired content	x	c	c	x	x
All Content Listing by Collection report	x	x	x	x	x
All Content Listing by Title report	x	x	x	x	x
Hidden channels					
Manage hidden content	*c Configurable by Skillsoft admin only*	c	c	x	x
Social					
Review Q&A	x			c	c

Assignments

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Learning - Assignments					
Manage assignments	x	x	c		
Create a new assignment	x	x	c		
Edit an assignment	x	x	c		
Copy an assignment	x	x	c		
Delete an assignment	x	x			
Add a learner to an existing assignment	x	x	c		
Send an assignment reminder email	x	x	c		

Communication and Marketing

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Learning - Content promotions (Banners, images, and strips)					
Manage promotions	x	c	c	x	c
Create a Promotion	x	c	c	x	c
Edit a Promotion	x	c	c	x	c
Reorder Promotions	x	c	c	x	c
Pause or Resume a Promotion	x	c	c	x	c
End a Promotion	x	c	c	x	c

External Learning

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Learning - External Learning					
External learning	x				

Analytics

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Platform					
Access the Overview dashboard	x	x	x	x	c
Access the Program Value dashboard	x	c	c		
User reports					
Access the Activity dashboard	x	x	x	x	c
Access the Skills Activity dashboard	x				
Access the Skills Benchmark dashboard	x	x	x	x	x
Show Best Score	x	x	x	x	x
Access the Skills Dis-	x	x	x	x	

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
covery dash-board					
Access the Learner Activity report	x	x	x	x	c
Access the User Listing report	x	x	x	c	c
Access the User Summary report	x	x	x	c	c
Access the Audience Summary report	x	x	x	c	c
Access the Executive report	x	x	x	c	c
Assignment reports					
Access the Assignments dashboard	x	x	x	c	c
Access the Assignment Summary	x	x	x	c	c

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
report					
Access the Assignment Summary by User report	x	x	x	c	c
Access the Assignment Detail by User report	x	x	x	c	c
Content reports					
Access the Content Access report	x	x	x	x	c
Access the Content insights report (Not yet available)					
Access the Skillsoft Content Status report	x	x	c	x	x
Access the Content Promotion Sum-	x	c	c	x	c

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
mary report					
Access the Content Promotion Detail by User report	x	c	c	x	c
Access the All Content Listing by Collection report	x	x	x	x	x
Access the All Content by Collection report	x	x	x	x	x
Access the Credentials report	x	x	x	x	c
Access the License Consumption report	x	x	x	x	
Access the Content Evaluations report	x	c		x	x
Access the Compliance	x	x	x	c	c

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Assignment Summary by User report					
Channel reports					
Access the Channel Summary report	x	x	x	x	x
Access the Channel Summary by User report	x	x	x	x	c
Access the Channel Detail by User report	x	x	x	x	c
Journey reports					
Access the Journey Summary report	x	x	x	x	x
Access the Journey Summary by User report	x	x	x	x	c
Access the Journey	x	x	x	x	c

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Detail by User report					
Reports					
Report downloads	x	x	x	x	c

Settings

Site configuration

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Set a global course completion score	x				
Set reporting parameters	x				
Specify an internal contact	x				
Set up login security questions	x				
Redirect your learners to a corporate login screen	x				

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Specify site login timeouts	x				
Enable features such as Ask a Mentor, sharing content, course feedback, completion certificates, and NASBA settings	x				
Manage custom Digital Badges	x				

Site branding

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Brand your site and notifications with a custom logo and colors	x				

Engagement and notifications

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Set your organization name for outgoing emails	x				
Set an email template language	x				
Enable or disable Percipio-generated emails	x				
Enable or disable email collection	x				
Enable or disable Digital Badges	x				
Enable or disable the Mobile App promotion links on the home page and footer	x				

Corporate Policy

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Create or edit a Corporate Policy	x				

Content Providers

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Add or edit a course provider	x				

System Integration

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Selecting content	x			x	

Percipio Compliance

Each Percipio role maps to a default Compliance role. In order for the Compliance roles to perform administrative tasks, a Percipio site admin must define security levels for each Compliance role before the user can access Percipio Compliance and perform administrative tasks. Any Compliance role is not scoped to the audience owned by that Percipio user.

If a user with a role other than Percipio site admin needs to access the Percipio Compliance admin interface, they must:

1. From the Percipio profile drop-down, select **Compliance**.
2. From the Compliance profile drop-down, select **Administrative tasks**.

Permission	Site Admin	Learning Admin	Manager	Content Curator	Content Coordinator
Access Percipio Compliance	x				
Create user attributes for Compliance emails	x				

Create a New User

You can create and manage user accounts in Percipio using several approaches. Any combination of approaches can be used together to accurately maintain your Percipio user population. To decide which approach is right for your organization, see Get Started with Users.

The user login experience depends on the options you choose. See User Login Experience for details.

To create an individual user (in Percipio)

1. From the Admin menu, click **USERS > User Management**. The User Management page displays.
2. Click **New User**. The New User page displays.
3. Enter the **User details**.

User profile fields

Field	Description
First Name	First name of the user. • Users can download certificates of completion only if this field and the Last Name field is entered.
Middle Initial	Middle initial of the user. This displays on certificates of completion.
Last Name	Last name of the user. • Users can download certificates of completion only if this field and the First Name field is entered.
Suffix	If the user has a suffix such as junior or PhD., select it from the list. This displays on certificates of completion.
Login Name	The user name used to sign in to Percipio. • This is a required field and must be unique within an organization (if SAML is activated,

Field	Description

	only the USER ID is required).
	• The Login Name can only contain alpha-numeric characters and/or some special characters, including:
	  • @ (at symbol)
	  • _ (underscore)
	  • + (plus sign)
	  • - (hyphen)
	  • . (period)

Email	The email address must be unique for each user. • Users can sign in to Percipio using their email address instead of their Login Name. • Email addresses are not shared with any third parties per our [Privacy Policy](#). • Entering an email

Field	Description
	address enables Percipio to send your users password reset emails, Welcome emails and reminders, assignment reminders, new content offerings, and more.
User ID* (External User ID in Bulk Import)	The ID used to identify a user inside Percipio. • This is a required field and must be a unique value within an organization. • If you do not specify a User ID, the system uses the Login Name by default. • If SAML is activated, the SAML ID is used for the User ID. If you make this value equivalent to a user's Microsoft account email address, then the user gets automatically logged in when using MS Teams.

Field	Description
Role	Defines the level of access a user has within Percipio. See User Roles User Roles in the Percipio Knowledge Base for detailed information about the different roles available. For Compliance, user roles correspond to security levels defined on the Security Setup page. See Define Security Levels for more information. • **Site Admin:** Access to the learner platform and all administrator functions. • **Learning Admin:** Usually responsible for multiple teams of users. Access to the learner platform, as well as the reports and dashboards for audiences assigned to them (via the Audience Owner designation). • **Manager:** Usually

Field	Description
	responsible for a team of users. Access to the learner platform, as well as the reports and dashboards for audiences assigned to them (via the Audience Owner designation). • **Content Curator:** Access to the learner platform, as well as the library management and custom content areas of Percipio Admin. • **Content Coordinator**: Access to the learner platform and the custom content area of Percipio Admin. • **Learner:** Access to the learner platform only. This is the default role for new users.
Status	Determines a user's access to Percipio.

Field	Description
	• **Active:** the user can log on to the platform. This is the default status for newly created users. • **Inactive:** the user can’t log on to the platform. However, a user's historical activity is retained.
Password	Password used to access Percipio if your learners are signing in with their Percipio login name. If your learners access Percipio with their network credentials (SAML/SSO), you do not need to specify a password. The password must be at least 8 characters long and must consist of 3 of the following 4 types of characters: • Lower case letters • Upper case letters • Numbers • Special characters (for example, !@#$%^&*)

Field	Description
	If you set a password, we recommend that you require the user to change their password on first-time login.
Approval manager	Optionally, add an **Approval Manager**. An approval manager is any active Percipio user. Users added in the Approval Manager field have permission to approve a Live Course registration request for the user being added.

4. Select **Require this user to change their password during first-time log in** to force the user to change his password when he signs into Percipio for the first time. Entering a value in the **Password** field automatically selects this feature.

   Note: If your users are accessing Percipio directly with their Percipio login name, and you are sending a welcome email, we recommend selecting this option. If you specify a password and send a welcome email without selecting the option to require password reset, the user will not know their password for subsequent logins.

   Once the user changes his password, this feature automatically turns off and the check box clears.

5. Optionally, select **Assign Live Course instructor privileges** if this user is a Live Course instructor and needs to manage the roster for classes they teach.
6. View the setting for **Show a link in the user's profile menu that opens their Skillsoft Coaching account**. This setting is configured by your Skillsoft Coaching CSM if this user needs access their Skillsoft Coaching account from their My Profile menu. You can only view the configuration. If you need to change it for a user, please contact your Skillsoft Coaching CSM.
7. Optionally, select **Send Welcome email**, and enter the date and time you want to send the initial Welcome email.

   > **Note:** The date and time are based on your local system settings, not the email recipients' settings.

   - The learner must have a status of **active** and a valid email address included in the profile to receive the Welcome email.
   - If you scheduled a single Welcome email to be sent while uploading users, you can cancel the email by clearing the option prior to the scheduled send date.
   - Compliance only customers can send Welcome Emails from Percipio Compliance. See Configure Email Notifications for more information.
8. Select or enter values for user attributes. If you have an attribute that supports multiple values, you can specify as many values as you need for each user; there is no limit.

   > **User role note**: If you have a user role of learning admin or manager with the permission to create new users, Percipio

recommends that you choose user attribute values that assign the user to an audience you own. Click **View Audiences** to see audience selection criteria. If you create a user that is not in an audience you own, you cannot see the user in the user list.

9. Click **Create**.

   The user profile is available in Percipio after the nightly sync, or after the user logs into the system, whichever comes first.

Edit an Existing User

You can edit your existing users' information using the Edit User page. To edit multiple users, see Update Existing Users by Bulk Import.

1. From the Admin menu, click **USERS > User Management**. The User Management page displays.
2. Locate the user you want to edit.
3. In the **Actions** column, click ⋮ > ✎. The Edit User page displays.
4. Modify the information as necessary. For detailed descriptions of the user fields, see Create a New User.

Note: If you change a user's role, the updated permissions show within minutes for the user without them having to log out.

Modifying a user's attributes

Adding or removing user attributes from a user's profile can impact that user's entitlements.

- If you remove a user attribute, the user is removed from any audiences defined by that attribute. The user also loses access to the content associated to the audience.
- If you add a user attribute and an associated value, the user is automatically added to any audiences defined by that attribute and associated value. The user gains access to the content associated to those new audiences. Upon the next sign in to Percipio, the user consumes a license for that license pool.

Reactivate a User

You can reactivate inactive users individually, or by using the bulk import feature.

To reactivate an individual user

1. From the Admin menu, click **USERS > User Management**. The User Management page displays.
2. Locate the inactive user you want to reactivate.
3. In the **Actions** column, click ⋮ > . The Edit User page displays.
4. In the Status field, select **Active**.
5. Optionally, select **Require this user to change their password during first-time log in** to force the user to change his password when he signs into Percipio for the first time.

   Entering a value in the Password field automatically enables this feature, which is indicated when the option is selected. Once the user changes his password, this feature automatically turns off and the check box clears.
6. Optionally, select the date and time you want to send an initial Welcome email.

> **Note:** The date and time are based on your local system settings, not the email recipients' settings.

- The user must have a valid email address included in the profile to receive the Welcome email.

7. Click **Update**.

To reactivate multiple users at once

1. From the Admin menu, click **USERS > User Management**.
2. Click **Download List** to generate and download a CSV file containing all of your users and their user profile data. Alternatively, if you have an existing CSV file you wish to import, skip to the next step.

   > **Note:** We recommend you that you prevalidate the CSV file prior to uploading it. You cannot undo an import. We suggest that you keep your CSV files at least one back in case you need to roll back any changes.

3. Open the downloaded file and remove all columns except for **externalUserID** and **status**. This avoids any accidental overwrites for other users and data in Percipio.

   Optionally, sort your CSV by status.

	A	B	C	D
1	externalUserId	status		
2	kadler	inactive		
3	percipio_admin	inactive		
4	eaolis	inactive		
5	sbellum	inactive		
6	ebrown	inactive		
7	mcampbell	inactive		
8	jcox	inactive		
9	cfate	inactive		
10	hrgermani	inactive		
11	cgrimshaw	inactive		
12	ljohansson	inactive		
13	ykonector	inactive		
14	imacdonough	inactive		
15	jmarkham	inactive		

users

4. Locate the users you want to reactivate and, in the **status** column, change their status to **active**.
5. Save the CSV file.
6. On the **User Management** page, click **Import**.
7. Click the **PREVALIDATE** tab.
8. Open your saved CSV file and click **Prevalidate Users**. Percipio conducts the following checks on the import file:
   - File format (CSV)
   - Authorized separators: a comma (,) a semicolon (;) and the Tab function.
   - Empty file
   - Maximum size
   - CSV field values
9. If any errors occur, click **Download prevalidation report** to and correct them.
10. Click the **IMPORT** tab.
11. Click **Select a file** to browse to your CSV file.

12. Select the date and time you want to send the initial Welcome email.

    > **Note:** The date and time are based on your local system settings, not the email recipients' settings.

    - The user must have a valid email address included in the profile to receive the Welcome email

13. Click **Import**.

    The file imports, and users update automatically.

14. View the bulk import reports.

Bulk Import Many Users

With Percipio, you can add multiple new users, update existing users, or both via the Bulk Import feature. Download one of the CSV files on the User List page to add or update multiple user profiles at once.

Frequently asked questions about importing users

What is my users login experience like?

User login experience depends on your user account creation method and the options you choose. See User Login Experience for details.

Can I change the date and/or time of my Welcome emails after I've submitted an import?

Yes, but in order to do this, you must re-import the original CSV file.

To change your Welcome email date and/or time

1. Follow the steps detailed in "Bulk Import Many New Users" on page 89.
2. Browse to the same file you originally imported.
3. Set the Welcome email date and time to the new date and time.
4. Click **Import**.

Can I leave CSV fields blank when updating users via bulk import?

Yes. When you update users via bulk import and leave fields blank, any values associated with that blank field are removed from the user's profile.

The only fields that do not change when left blank are the `newPassword` and `newExternalUserId` fields.

We recommend that, when updating existing users, you select **Download list** instead of **Download template**. When you download the list, it includes all current information for all of your user accounts, and is easier to make deliberate changes to only the required areas.

Can I force users to update passwords using the bulk import?

Yes. In your bulk import file, add a column entitled `mustResetPassword` (use exact spelling and capitalization). Put the column anywhere after the `loginName` and `externalUserID` columns (A and B).

For each user who needs to reset a password, specify at least the user's loginName or externalUserID and then enter **Yes** in the `mustResetPassword` column for that user.

Next time the user attempts to sign in, Percipio prompts them to change their password.

Can I update user passwords using the bulk import?

Yes. In your bulk import file, add a column entitled `updatePassword` (use exact spelling and capitalization). Put the column anywhere after the `loginName` and `externalUserID` columns (A and B).

For each user who requires a new password, specify at least the user's loginName or externalUserID and then enter the new password in the `updatePassword` column for that user. You might also want to consider forcing the users to reset their password at this point. For more details, see "Bulk Import Rules" on page 61.

Percipio does not notify the user of the password change.

Can I change the headers within the template?

No. Headers must match Percipio exactly as they display in the downloaded template or list. However, you can remove an entire column.

Can I delete multiple users at once?

No. At this time, there is no functionality to delete users. You can change user statuses from active to inactive by entering **inactive** into their corresponding `status` column.

Can a user have multiple values for a custom attribute?

Yes for the list attribute type.

If a custom list attribute has the Allow multiple values to be selected for this attribute option selected, you can specify multiple values for an individual user by separating each value with a | (pipe) character.

How can I retain special characters within attribute values during importing?

If any of your attributes contain special characters, save the import file as **CSV UTF-8 (Comma delimited) (*.csv)** to maintain the special characters during the import.

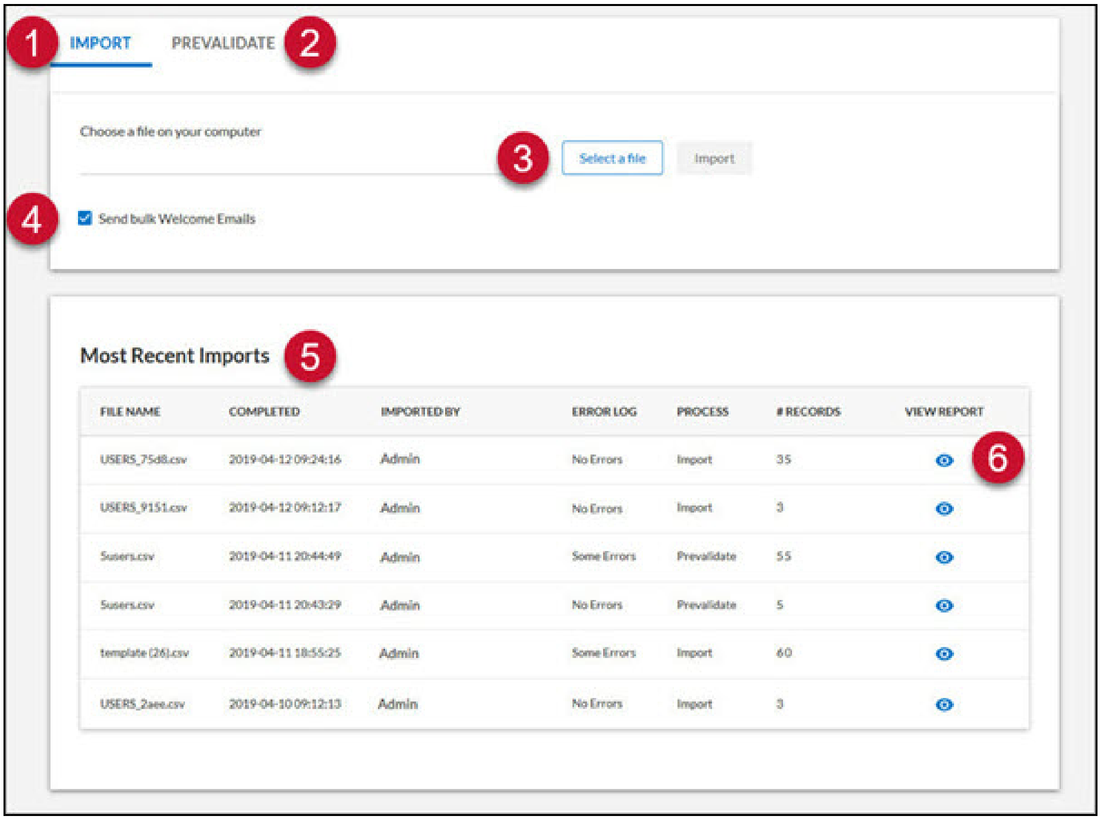
My attribute values contain commas so using a CSV file does not work for me, what should I do?

Enclose an attribute value that contains a comma in double quotations to retain the comma within the attribute value. Continue using a comma to separate the attribute values.

> **Example:** You have an attribute called **Job Title**. A value for a user is **Manager, HRIS**. The entry for user called Kelly James in HR in your CSV file might look like:
> Kelly, James, "Manager, HRIS", HR

Import Page

Use the Import page to bulk-add new users, bulk-update existing users, or both, using a CSV file.



1. **Import tab:** Use this tab to import a populated CSV file.
2. **Prevalidate tab:** Use this tab to upload and validate a CSV file prior to importing it. Prevalidating a CSV file allows you to fix any errors prior to Percipio upload.
3. **File selection:** Select a CSV file for import or prevalidation.
4. **Send bulk Welcome Emails:** Available on the Import tab, when selected, Percipio sends a Welcome email to all active users in the CSV file that have not yet received one.
5. **Most Recent Imports:** Displays a snapshot report of the most recent CSV file imports. See Bulk Import Reports for details.
6. **View Report:** Click to open a report detailing any errors found during the prevalidation or import process. See Bulk Import Reports for details.

Bulk Import Rules

Refer to the following rules when uploading a CSV file to Percipio.

- For organizations that do not have SAML enabled, the required CSV field for bulk import is `loginName`. See the CSV field values table for details.
- For organizations with SAML enabled, the required CSV field for bulk import is `externalUserID`. See the CSV field values table for details.
- Imported user profile values must be unique, as defined in the CSV field values table.
- To update or change an existing user's User ID, enter the new User ID in the `newExternalUserId` field.
- If an optional field in the CSV file is empty, Percipio applies the same default values as when you create a new user.
- If you need to update users passwords, add a column to the bulk template entitled `updatePassword`. Specify the new password in this column. Percipio does not notify the user of the password change. See the Additional CSV field values table for details.
- If you need to force users to update passwords, add a column to the bulk template entitled `mustResetPassword`. Enter a value of Yes in this column. See the Additional CSV field values table for details.
- The header row of the CSV file that contains the CSV field ID is case sensitive. If the capitalization does not match, Percipio ignores that column during data import. To avoid a case mismatch, a best practice is to download the template as a starting point.
- If a custom list attribute has the Allow multiple values to be selected for this attribute option selected, you can specify multiple values for an individual user by separating each value with a | (pipe) character.
- If any of your attributes contain special characters, save the import file as **CSV UTF-8 (Comma delimited) (*.csv)** to maintain the special characters during the import.

- Enclose an attribute value that contains a comma in double quotations to retain the comma within the attribute value. Continue using a comma to separate the attribute values.

  > **Example:** You have an attribute called **Job Title**. A value for a user is **Manager, HRIS**. The entry for user called Kelly James in HR in your CSV file might look like:
  > Kelly, James, "Manager, HRIS", HR

- For user attributes, values must be unique but are not case sensitive.

  > **Example:** If you have a user attribute of `location` with a value of `boston`, Percipio reads `BOston`, `BOSTON`, and `Boston` as the same value, `boston`.

Download a CSV File

Percipio uses a CSV file to import or update multiple users at once. The file can be opened in a spreadsheet program (such as Microsoft Excel) and edited directly. Prevalidate the CSV file to ensure your file has no errors

To download a CSV file

1. From the Admin menu, click **USERS > User Management**. The User Management page displays.
2. Click one of the available links:
   - **Download Template:** A CSV file with only the headers populated. These headers contain the CSV field values listed below, with any user attributes your organization has implemented.
   - **Download List:** A CSV file with the same headers described above, but it also includes all of the user profile data for your organization's existing Percipio users.

CSV fields and accepted values

> **Note:** Security Assertion Markup Language (SAML) is an open standard that allows identity providers to pass authorization credentials to service providers. SAML enables Single-Sign On (SSO), which allows users to use their company credentials to sign into Percipio.

If any of your attributes contain special characters, save the import file as **CSV UTF-8 (Comma delimited) (*.csv)** to maintain the special characters during the import.

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
`loginName`	Login Name	***Required field for non-SAML organizations** Name used to access Percipio. This must be unique within an organization (if SAML is activated, only USER ID is required). The Login Name can only contain alphanumeric characters and/or some special characters, including:	Maximum length 128

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		• @ (at symbol) • _ (underscore) • + (plus sign) • - (hyphen) • . (period)	
`externalUserId`	User ID	***Required field for SAML organizations** The ID used to identify a user inside Percipio. This must be a unique value within an organization. If you do not specify a User ID the system uses the login name by default. If SAML is activated, the SAML ID is used for the User ID. If you make this value equivalent to a user's Microsoft account email address, then the user gets automatically logged in when using	Maximum length 255

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		MS Teams.	
`newExternalUserId`	<no field in Percipio>	Used only to update an existing `externalUserID` (the ID used to identify a user inside Percipio) during bulk import. Enter a value that will replace the External User ID for an existing user.	If you enter a value in this column, it is ignored if the row is for a new user.
`migrationID`	<no field in Percipio>	*Optional field Used to link existing Academy users or Skillport Advanced Compliance users to user IDs within Percipio. **Note:** If you have an older version of the CSV file without this column, you must manually add this as a new column to your file. Enter `migrationID` as the column	

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		header, and save the file prior to uploading it to Percipio. You can leave the column blank.	
`newPassword`	Password	*Optional This field is for **new users only** and is the password used to access Percipio. The password must be at least 8 characters long and consist of 3 of the following 4 types of characters: • Lower case letters • Upper case letters • Numbers • Special characters (for example, !@#$%^&*) **Note:** Use this field to set the initial password	At least 8 characters plus complexity rules If you specify a password, new users are automatically prompted to change their password on first login unless you set the `mustresetpassword` to **NO**. If you don't a specify a password, users receive a separate email during their first

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		for new users only. Values added to this field for existing users are ignored to ensure that any user-created passwords are not overwritten. The value in this field is not used for users accessing Percipio via network credentials (SAML/SSO).	login that prompts them to set a password.
`firstName`	First Name	*Optional field First name of the user. Users can download certificates of completion only if this field and the Last Name field is entered.	Maximum length 255
`lastName`	Last Name	*Optional field Last name of the user. Users can download certificates of completion only if this field and the First Name field is entered.	Maximum length 255

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
`middleInitial`	Middle initial	*Optional field Middle initial of the user. Users see this on certificates of completion provided a first and last name have also been specified.	
`suffix`	Suffix	*Optional field Valid values include: **I**, **II**, **III**, **Esq.**, **Jr.**, **JR**, **MD**, **PhD.**, and **Sr.** Suffix of the user. Users see this on certificates of completion provided a first and last name have also been specified.	
`email`	Email	*Optional field Used by Percipio to send email notifications. The email address must be unique for each user. Users can sign into Percipio using their email address instead of their	Maximum length 255

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		Login Name.	
`role`	Role	*Optional field Defines the level of access a user has within Percipio. All user roles have access to Percipio Learner. • **site admin:** Access to the learner platform and all administrator functions. • **learning admin:** Usually responsible for multiple teams of users. Access to the learner platform, as well as the reports and dashboards for audiences assigned to them (via the Audience Owner designation).	

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		• **manager:** Usually responsible for a team of users. Access to the learner platform, as well as the reports and dashboards for audiences assigned to them (via the Audience Owner designation). • **content curator:** Access to the learner platform, as well as the library management and custom content areas of Percipio Admin. • **content coordinator:** Access to the learner platform, as well as the custom con-	

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		tent area of Percipio Admin. • **learner:** Access to the learner platform only. This is the default role for new users. If you added custom roles, enter the exact name you gave the custom role. For a complete description of all roles and their specific privileges, see User Roles.	
`status`	Status	Status determines a user's access to Percipio. • **active:** the user can log on to the platform. This is the default status for newly created users.	

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		• **inactive:** the user can’t log on to the platform. However, a user's historical activity is retained.	
`isinstructor`	Assign Live Course instructor privileges	*Optional field Assigns instructor privileges to a user so they can manage a roster for a class they teach. Values are not case sensitive. If you want to assign the user with instructor privileges, the following values are acceptable: • **TRUE** • **YES** If you do not want to assign instructor privileges, the following values are acceptable:	

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		• **FALSE** • **NO** • leave the field blank	
`approvalManager`	Approval Manager	*Optional field. Allows you to assign one approval manager to a user. Enter the external user ID or email address of the manager who can approve things like Live Course registration requests. The approval manager must have an active user account in Percipio. The approval manager can have any user role.	If the name to be added to the Approval Manager field is being created in the current import, the field will be correctly populated. If the user to be added to the Approval Manager field does not exist or is not present in the bulk list, Percipio reports an error.
`jobTitle`	N/A	*Optional field Use this field to specify	Maximum length 255

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		the user's job title. This is a string field.	
`directManager`	N/A	*Optional field Use this field to specify a user's direct HR manager. Enter the external user ID or email address of the HR manager who directly manages this user. The direct manager must have an active user account in Percipio. The direct manager can have any user role.	If the name to be added to the Direct Manager field is being created in the current import, the field will be correctly populated. If the user to be added to the Direct Manager field does not exist or is not present in the bulk list, Percipio reports an error.
`welcomeEmailLanguage`	Welcome email language (on the Engage-	Specifies the language of the Welcome emails for each user in your organization. Enter the value you want to asso-	

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
	ment & Notifications page)	ciate to the user. You can find the appropriate value from the list of supported languages.list of supported languages. **Note:** Languages are not case sensitive within the CSV file. During import, all language values automatically convert to lowercase. If left blank, Percipio defaults the Welcome emails to the language selected in the Email template language section on the Engagement page. The specified language on the CSV file overrides the selection on the Engagement page.	
`<user attributes>`	Custom user attrib-	Each custom attribute in your organization's Per-	Maximum length 255

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
	utes for your site	cipio site has a column. Enter the values you want to associate to a user. **Note:** Attributes are not case-sensitive within the CSV file. During import, all user attribute values automatically convert to lowercase. • **String attributes:** The entered value must be unique to each user. See [Create a String Attribute]() for details. • **String attribute values** retain their case ("Location" is considered a different	Date types: any valid ISO8601 or RFC2822 formatted date string User types: reference email or externalUserId of existing accounts

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		value than "location" or "LOCation"). Date = date format, and Percipio user is the userID • **List attributes:** Ensure existing List attribute values in the CSV file match those in the attribute's Values column on the User Attributes list. • New values for List attributes are only accepted if the attribute is set to allow the creation of new values. See	

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		Create a List Attribute for details. • **List attribute values** use the first instance of a value for all subsequent values ("Location" is the same as "location" and "LOCation"). • If a custom list attribute has the Allow multiple values to be selected for this attribute option selected, you can	

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		specify multiple values for an individual user by separating each value with a | (pipe) character. If you update existing values, you must still include all current values you want to keep, along with any new ones. • If you bulk import to update existing user data, any items	

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		entered in this field overwrite what is currently specified. If you leave the list field blank, current values specified are removed. • **Percipio User attributes:** The entered value must be either an existing Percipio User ID or an email address. See Assign a Percipio User Attribute for details. • **Date Attributes:** The entered date value can be in	

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		any of the following formats; see Assign a Date Attribute for details. • 2019-10-31 (this is preferred format) • 2019-10-31T12:34:78.678Z • Thurs, 31 Oct 2019 00:18:56 +0000 • Thurs, 31 Oct 2019	

CSV field ID	Corresponding Percipio field name	Description	Requirements (if any)
		• 31 Oct 2019	

Additional CSV Fields

The fields below do not appear when you download a bulk import template. You can manually add a column to the bulk import template anywhere after the `loginName` and `externalUserID` columns, if needed. Label the new column exactly as indicated in the **CSV field ID** column from the table below.

CSV field ID	Corresponding Percipio field name	Description	Notes or Requirements (if any)
`mustResetPassword`	Require users to change their password next time they login.	*Optional field Requires users to reset their password when signing in. Values are not case sensitive. If you want to require a user to change her password, the following values are acceptable: • **TRUE**	Insert this column with a value of **NO** if you do not want new users to reset the password you defined for them. Insert this column with a value of **Yes** if you want

CSV field ID	Corresponding Percipio field name	Description	Notes or Requirements (if any)
		• **YES** • **1** • leave the field blank If you do not want to require a user to change her password, the following values are acceptable: • **FALSE** • **NO** • **0** If the `mustResetPassword` column is not included in your CSV file: • New users in the CSV file that have a value specified in the `newPassword`	existing users to reset their password on their next login.

CSV field ID	Corresponding Percipio field name	Description	Notes or Requirements (if any)
		column will be required to change their password when they first sign in (the `newPassword` value is their temporary password). • Existing users in the CSV file are not required to change their password.	
`updatePassword`	<no field in Percipio>	*Optional field Specify a new password for the user. The password must be at least 8 characters long and consist of 3 of the following 4 types of characters: • Lower case let-	At least 8 characters plus complexity rules

CSV field ID	Corresponding Percipio field name	Description	Notes or Requirements (if any)
		ters • Upper case letters • Numbers • Special characters (for example, !@#$%^&*) If you leave the field blank, the user retains their existing password. Percipio does not notify the user of the password change. If you are resetting passwords for multiple users and using the same password for all, for security reasons, add the `mustResetPassword` field to your bulk import file to force users to	

CSV field ID	Corresponding Percipio field name	Description	Notes or Requirements (if any)
		create their own password upon sign-in.	

Prevalidate the CSV File

Before importing your users, use the **Prevalidate** feature to ensure your file is free from errors and ready for upload. You cannot undo an import. We suggest that you keep your CSV files at least one back in case you need to roll back any changes.

1. From the Admin menu, click **USERS > User Management**. The User Management page displays.
2. Click **Import**.
3. Click the **Prevalidate** tab.
4. Click **Select a file** to choose the file you want to validate.
5. Click **Open**.
6. Click **Prevalidate Users**.

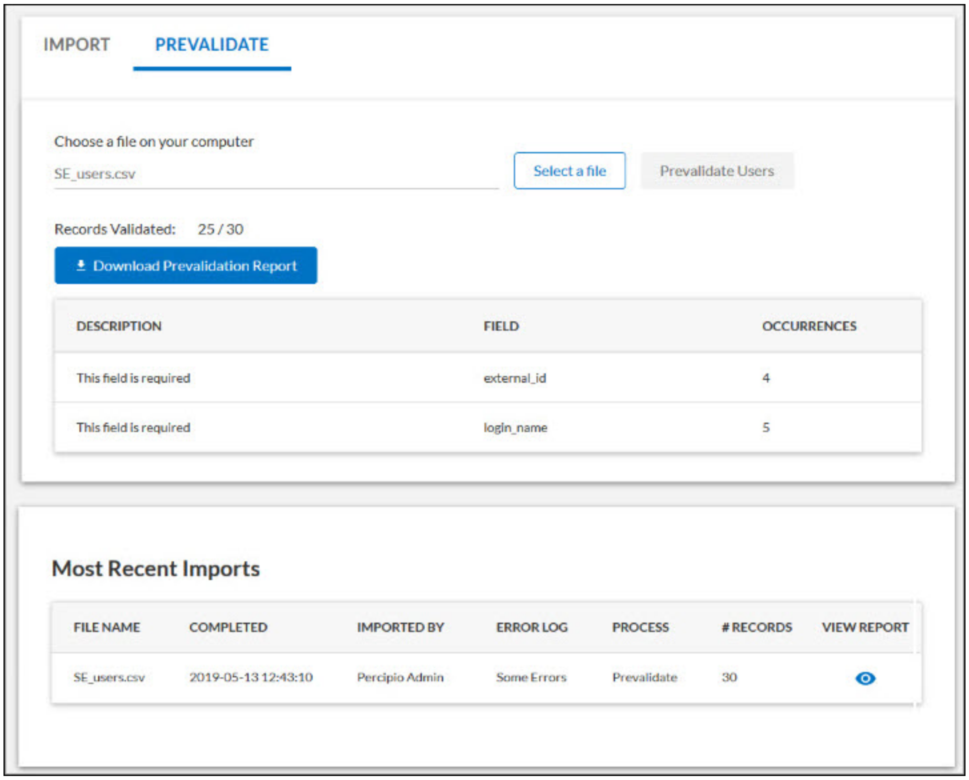
   Note: Prevalidation does not import your users from the file.

   Percipio conducts the following checks to validate the import file:

   - File format is a CSV format
   - Commas (,) or tabs can be used as separators
   - If the file is empty

- File does not exceed maximum size
- If CSV field values are valid

If any of these validations fail, descriptive error messages display:



7. To correct these errors, click **Download prevalidation report** to view the file.
8. A new column at the end of the CSV file details which lines have an error, and what the error is.

   Correct the errors within the CSV file and save it.

   > **Note:** Once corrected, remove the error column from your CSV file and save it. You can then use this file as your import file.

9. Upload your corrected CSV file using the procedures in Bulk Import Many New Users.

Bulk Import Many New Users

Use the bulk import to add multiple new users into Percipio. To create a single user, see Create a User. The user login experience depends on the options you choose. See User Login Experience for details.

> **Note:** We recommend you that you prevalidate the CSV file prior to uploading it. You cannot undo an import. We suggest that you keep your CSV files at least one back in case you need to roll back any changes.

1. From the Admin menu, click **USERS > User Management**. The User Management page displays.
2. Select **Bulk Import Users**.
3. On the **IMPORT** tab, select the file you want to import. Percipio conducts the following checks on the import file:
   - File format (CSV)
   - Authorized separators: a comma (,) and the Tab function.
   - Empty file
   - Maximum size
   - CSV field values
4. Optionally, select the date and time you want to send the initial Welcome email.

   > **Note:** The date and time are based on your local system settings, not the email recipients' settings.

5. Select **Import**.
6. View the batch import reports.

Update Existing Users by Bulk Import

If you want to make a change to multiple users, for example, change them from active to inactive or populate a new user attribute, you can use the bulk import feature.

To update a single user, see Edit an Existing User.

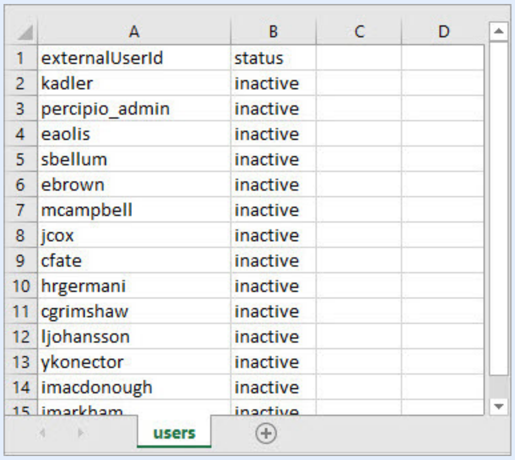
> **Note:** We recommend you that you prevalidate the CSV file prior to uploading it. You cannot undo an import. We suggest that you keep your CSV files at least one back in case you need to roll back any changes.

> **Caution:** When a column in the CSV file is left blank, Percipio imports a default value for the associated user profile field or removes existing values from custom attributes. Prior to uploading a CSV file, we recommend you delete all blank columns from the file to avoid overwriting any existing field values.

Creating the CSV file for importing

When creating a CSV file for changing user data, the only columns you need to specify in the CSV are the externalUserID (the unique user identifier in Percipio) and the columns for which you want to add or change data.

> **Example:** If you want to change a many users from active to inactive, your CSV file can look like this:



	A	B	C	D
1	externalUserId	status		
2	kadler	inactive		
3	percipio_admin	inactive		
4	eaolis	inactive		
5	sbellum	inactive		
6	ebrown	inactive		
7	mcampbell	inactive		
8	jcox	inactive		
9	cfate	inactive		
10	hrgermani	inactive		
11	cgrimshaw	inactive		
12	ljohansson	inactive		
13	ykonector	inactive		
14	imacdonough	inactive		
15	imarkham	inactive		

users

When you ensure all other columns are removed from your file, you avoid any accidental data overwrites.

Updating the data

If you don't know the User ID or are unfamiliar with your user data

The best way to get the externalUserID for each user and exact column heading titles is to download the current user list.

1. From the Admin menu, click **USERS > User Management**. The User Management page displays.
2. Click **Download List**. A CSV file containing all of your users and their user profile data downloads.

The downloaded list contains a row for each user and a column for each user profile and custom user attribute. To update this file with changes:

1. Sort and filter the columns to group users together. Delete any rows that contain users you do not want to update.
2. Delete any columns that contain data that you do not want to update.

3. Update the data in the remaining columns. If you leave a column blank, Percipio will populate it using system defaults or if it is a custom attribute, Percipio will remove any existing data. See CSV fields and accepted values for how to specify data in columns.
4. Save your file.

If you have the User IDs and are familiar with your user data

If you have a list of user ID's that need to be updated, you can copy them into the downloaded import template.

1. From the Admin menu, click **USERS > User Management**. The User Management page displays.
2. Click **Download Template**. A CSV file containing all user attributes downloads.

The downloaded template contains a column for each user profile and custom user attribute. To create your file for uploading changes:

1. Copy user ID's into the externalUserID field.
2. Delete any columns that you do not want to update.
3. Add data in the remaining columns. If you leave a column blank, Percipio will populate it using system defaults or if it is a custom attribute, Percipio will remove any data. See CSV fields and accepted values for how to specify data in columns.
4. Save your file.

To update many existing users via a bulk import

1. On the Users > User Management page, click **Bulk import users**.
2. Click the **IMPORT** tab.

3. Choose the file you want to import and click **Open**. Percipio conducts the following checks on the import file:
   - File format (CSV)
   - Authorized separators: a comma (,) a semicolon (;) and the Tab function.
   - Empty file
   - Maximum size
   - CSV field values
4. Select the date and time you want to send the initial Welcome email.

   Note: The date and time are based on your local system settings, not the email recipients' settings.
5. Click **Import**.
6. View the bulk import reports.

Bulk Import Reports

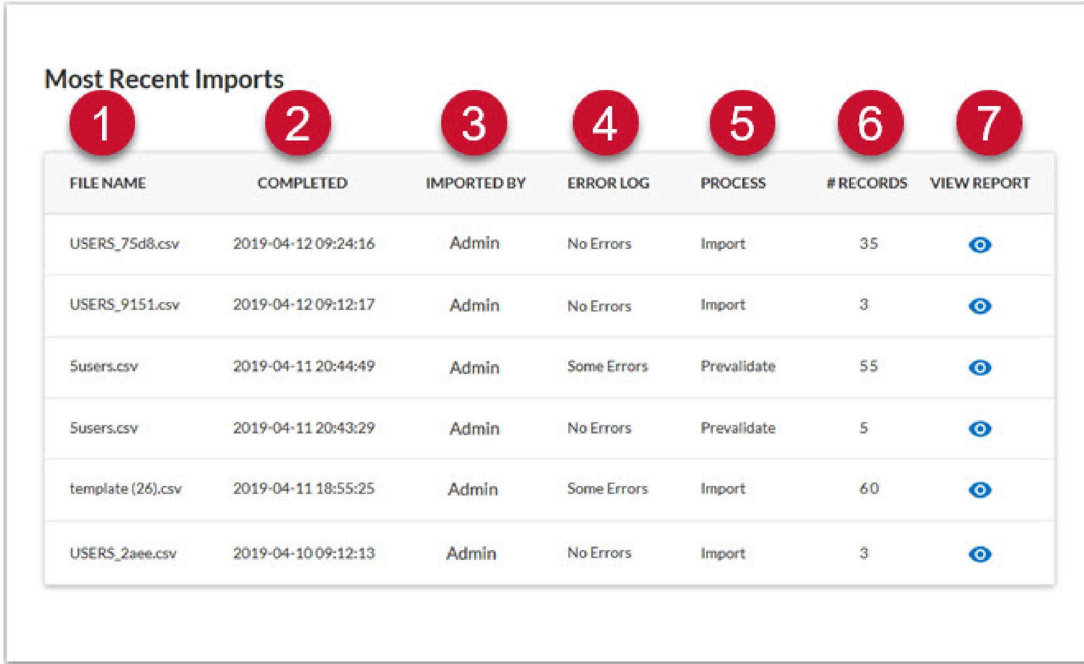
Once you import or prevalidate a CSV file, a report generates with the details.

To access the bulk import reports

1. From the Admin menu, click **USERS > User Management**. The User Management page displays.
2. Click **Import**. The Import page displays.

   The Most Recent Imports section displays on the Import page.

Most recent reports list



Most Recent Imports

FILE NAME	COMPLETED	IMPORTED BY	ERROR LOG	PROCESS	# RECORDS	VIEW REPORT
USERS_75d8.csv	2019-04-12 09:24:16	Admin	No Errors	Import	35	
USERS_9151.csv	2019-04-12 09:12:17	Admin	No Errors	Import	3	
5users.csv	2019-04-11 20:44:49	Admin	Some Errors	Prevalidate	55	
5users.csv	2019-04-11 20:43:29	Admin	No Errors	Prevalidate	5	
template (26).csv	2019-04-11 18:55:25	Admin	Some Errors	Import	60	
USERS_2aee.csv	2019-04-10 09:12:13	Admin	No Errors	Import	3	

1. **File name:** The CSV file name.
2. **Completed:** The date and time stamp of the prevalidation or upload.
3. **Imported by:** Name of the user who prevalidated or imported the file.
4. **Error log:** Displays if the file has errors or not.
5. **Process:** Displays the type of process: Prevalidate or Import.
6. **# Records:** The total number of user records within the file. This is inclusive of both validated and invalidated records.
7. **View report:** Click to view a detailed report of any errors found during the prevalidation or upload. This report includes information about the number of users that were processed and an explanation of any errors by indicating the row, the field, and an associated error message.

> **Note:** The “row” as indicated in this report does not count the header (or first row) of your bulk import file. When you

are comparing your CSV file to this error report, take this into consideration.

Bulk Import Error Messages

These errors can occur when uploading your CSV file.

Note: If a column is not required and it does not match the case of the header row from the template file, the data in the column is ignored during bulk import.

CSV field	Error message	Reason	Solution
`loginName`	`login_name->invalid_login_name_format`	One or more of the entered login names is formatted incorrectly.	Check your login names to ensure they only contain alphanumeric characters and/or the following special characters: • @ (at symbol) • _ (underscore) • + (plus sign) • - (hyphen) • . (period)
`loginName`	`login_name->field_too_long`	One or more login names exceed the allowed maximum character length.	Ensure all login names are no longer than 128 characters.

loginName	login_name->field_not_unique	One or more login names are already in use in Percipio. Login names cannot be reused.	Change the login name to be a unique value within Percipio.
loginName	login_name->field_not_camel_case_unique	One or more login names exist within Percipio, with different casing. Login names are not case-sensitive, so you cannot use the same name with different casing for different users (for example, the login name JohnSmith is seen as the same as a login name of johnsmith).	Change the login name to a unique value within Percipio.
externalUserId	external_id-	One or more user IDs are	Change the user ID to a unique value within Percipio.

	>field_not_camel_case_unique	already in use in Percipio. User IDs are not case-sensitive, so you cannot use the same name with different casing for different users (for example, the user ID john_smith is seen as the same as a user ID of John_Smith).	
externalUserId	external_id->field_too_long	One or more user IDs are already in use in Percipio. User IDs cannot be reused.	Change the user ID to a unique value within Percipio.
externalUserId	external_id->field_too_long	One or more user IDs exceed the allowed maximum character length.	Ensure each user ID is no longer than 255 characters.
status	status-	One or more	Check your status column

	>must_be_active_or_inactive	user statuses are not entered correctly.	to ensure only **active** or **inactive** is entered on each line.
role	role->is_invalid	One or more roles is entered incorrectly.	Ensure the roles in this column are either **site admin**, **learning admin**, **manager**, **content curator**, **content coordinator**, or **learner**.
email	email->invalid_email_format	One or more emails addresses are not formatted correctly.	Check that your email addresses are in the following format: user-specific character(s), @ symbol, a case-insensitive domain (example: JohnSmith@akara.com)
email	email->field_not_unique	One or more emails are already in use in Percipio. Emails cannot be reused.	Change the email to a unique value within Percipio.
email	email->field_too_long	One or more emails exceed the allowed maximum character length.	Ensure each email address is no longer than 255 characters.

`newPassword`	`password->at_least_8_characters`	One or more do not meet the minimum character length requirement.	Check your passwords and ensure they meet the minimum required length of 8 characters.
`password`	`password->complexity_too_low`	One or more passwords do not meet the complexity requirements.	Passwords must be at least 8 characters long **and** consist of 3 of the following 4 types of characters: • Lower case letters • Upper case letters • Numbers • Special characters (for example, !@#$%^&*)
`firstName`	`first_name->field_too_long`	One or more first names exceed the allowed maximum character length.	Ensure each name is no longer than 255 characters.
`lastName`	`last_name->field_too_long`	One or more last names exceed the allowed maximum character length.	Ensure each name is no longer than 255 characters.

	Invalid_Header_Warning	1. One or more of the headers in the CSV file have been modified and no longer match the columns in the original CSV template. 2. One or more of the required headings are missing in the CSV file.	1. Ensure the headers in your CSV file match the headers in the CSV template file. Access the template file on the User List page (click **Download Template**). 2. If you are updating users, you must have the **externalID** header in your CSV file. If you are creating new users, you must have the **login_name** and **newPassword** headers in your CSV file.
User attributes	attribute name->forbidden_user_	One or more values for the user attribute does not exist,	Check the specified user attribute values and enter only those that exist for your organization.

	attrib-ute_value	and the attribute is not set to allow new value creations.	If you need an additional value for the user attribute, contact your Site Admin to add the value to the user attribute.
User attrib-utes	attribute name->field_too_long	One or more of the custom attribute values exceed the allowed maximum character length.	Ensure all attribute values are no more than 255 characters.

User Attributes

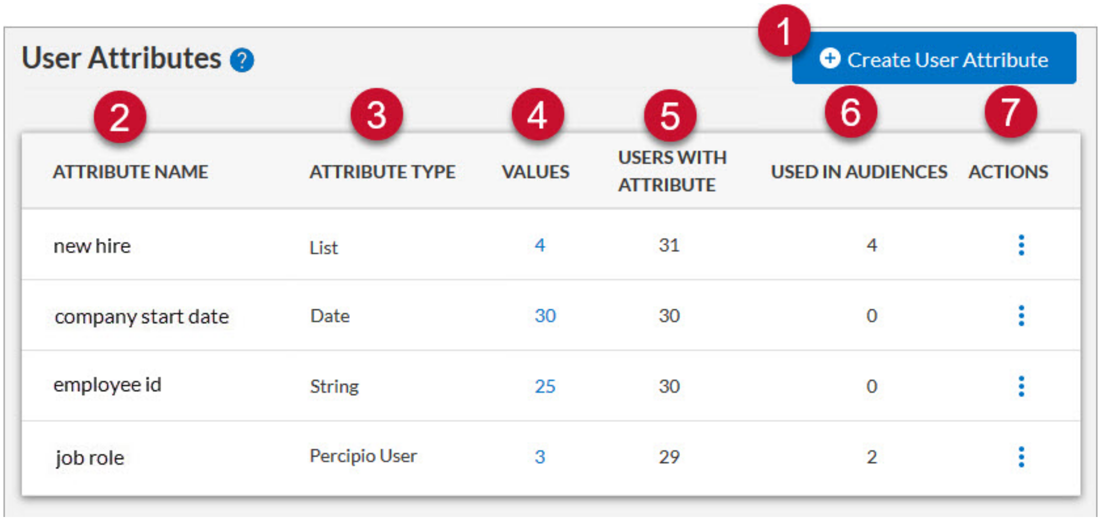
User attributes function as data points for each user account. For example, you can create a user attribute called Geography and add values such as: Americas, Europe, and Asia. You assign one value to each user when you create them.

You use attributes and their values to sort and filter reports and to group users into audiences. You use audiences when you want to make assignments and promote content to a specific group of users. You also use audiences to distribute content licenses to your users. The more user attributes you create, the more refined your audiences can be.

The ability to have multiple attributes defined for each user provides a great deal of flexibility, but it also means you must do thorough planning in order to support your long-term user management strategy.

You can define up to 30 user attributes on your Percipio site.

User Attributes list



1. **Create User Attribute:** Opens the Create Attribute page, where you can create one of the available attribute types.
2. **Attribute Name:** A descriptive title for the attribute. An attribute name is not case sensitive, but it must be unique.
3. **Attribute Type:** Attributes can be String, List, Percipio User, or Date. For details about these, see user attribute types and values.
4. **Values:** Click to view a complete list of values assigned to the attribute. There is no limit on the number of values you can assign to an attribute.
5. **Users with Attributes:** The number of individual users who are assigned to the attribute.
6. **Used in Audiences:** The number of audiences that have the attribute directly assigned to them.
7. **Actions:** You can edit or delete an attribute, but you can only delete an attribute if it is not assigned to any audiences. When an attribute is deleted, the values assigned to individual users are also deleted.

Important information about user attributes

- You can define a maximum of 30 user attributes, and attribute values can only contain text and numbers.
- You select the attribute type when you create a new user attribute.
- If a custom list attribute has the Allow multiple values to be selected for this attribute option selected, you can specify multiple values for an individual user by separating each value with a | (pipe) character.
- After the Allow multiple values to be selected for this attribute option is selected for a list attribute, that attribute cannot be returned to single value setting.
- When you edit an attribute, or add the attribute to (and specify a value for) an audience audience, the content licenses automatically update for users to give them access to the content available to that audience users assigned that attribute are added to the audience and inherit current assignments made to the audience.
- If you use self registration, you can configure each attribute type, except Percipio user, to display on a self registration page. For each attribute, you can add display labels in other languages, so when a user's browser is configured for that language, they see the attribute fields on the self registration page display in that language.

String Attribute

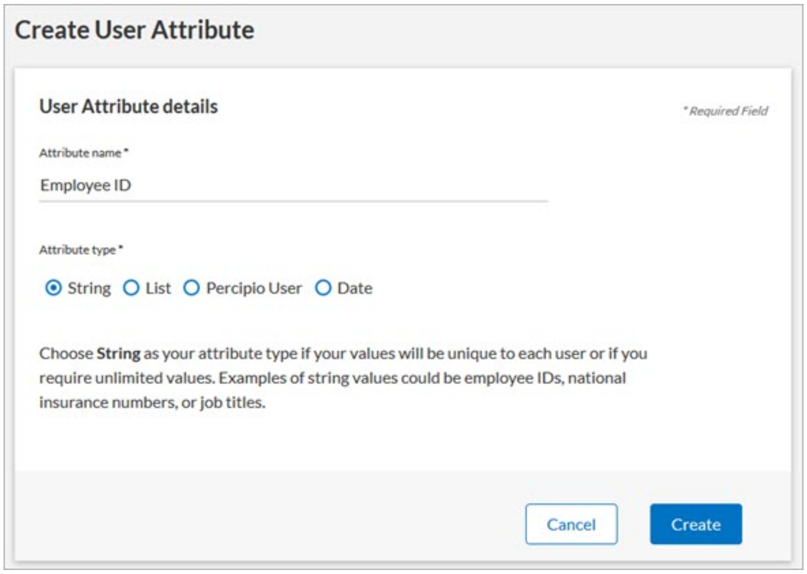
Use the String attribute if the values you need to create are unique to each user (for example, an employee ID, a national insurance number, or a specific job title).

Using a String attribute (example)

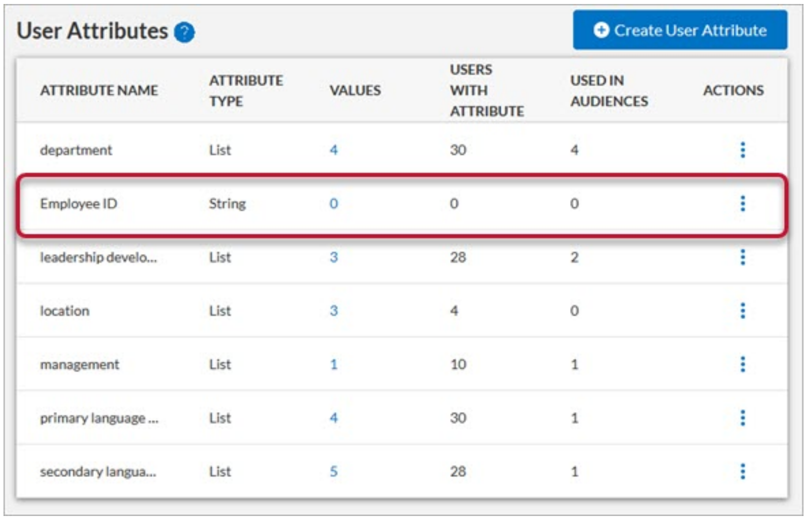
You want to ensure that your employee IDs are captured as part of your users' data in Percipio.

To do this:

1. [Create a String attribute]() and name it **Employee ID**.



Once created, the new **Employee ID** attribute displays on the User Attributes page, but without any values:



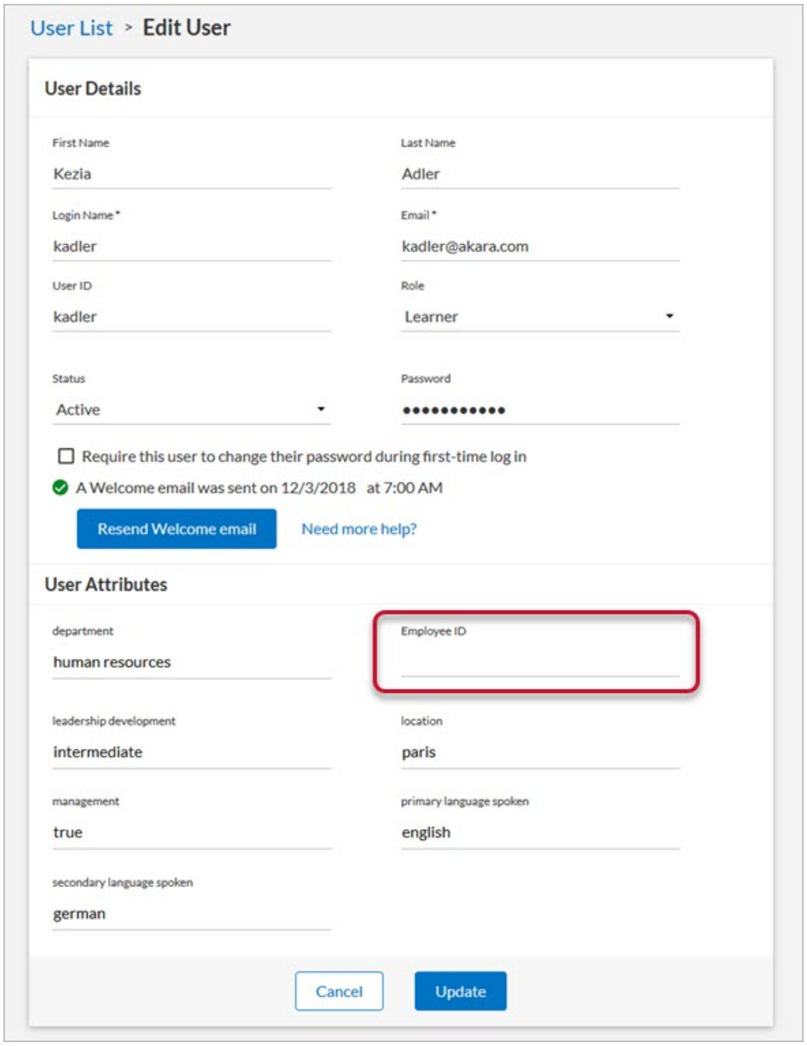
ATTRIBUTE NAME	ATTRIBUTE TYPE	VALUES	USERS WITH ATTRIBUTE	USED IN AUDIENCES	ACTIONS
department	List	4	30	4	⋮
Employee ID	String	0	0	0	⋮
leadership develo...	List	3	28	2	⋮
location	List	3	4	0	⋮
management	List	1	10	1	⋮
primary language ...	List	4	30	1	⋮
secondary langua...	List	5	28	1	⋮

2. **Add an employee ID for an individual user.**

   a. On the **USERS > User List** page, locate the user you want to edit.

   b. In the **Actions** column, click ⋮ > ✎. The Edit User page displays.

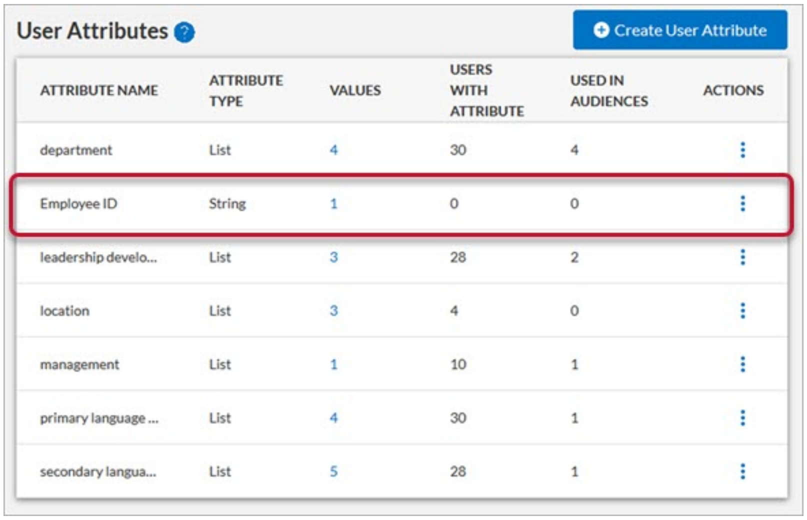
   c. In the User attributes section, enter the user's employee ID in the **Employee ID** attribute field.



The entered employee ID becomes a value for the **Employee ID** attribute.

d. Click **Update**.

The User Attributes page updates the **Values** column:



User Attributes

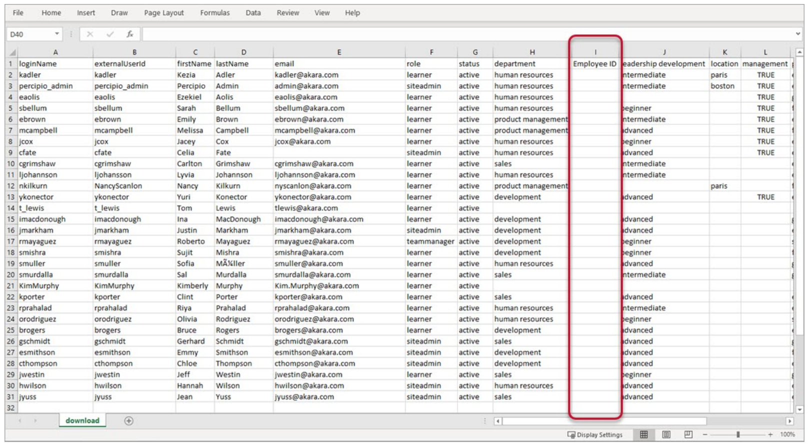
Create User Attribute

ATTRIBUTE NAME	ATTRIBUTE TYPE	VALUES	USERS WITH ATTRIBUTE	USED IN AUDIENCES	ACTIONS
department	List	4	30	4	
Employee ID	String	1	0	0	
leadership develo...	List	3	28	2	
location	List	3	4	0	
management	List	1	10	1	
primary language ...	List	4	30	1	
secondary langua...	List	5	28	1	

3. **Add an employee ID for multiple users at once.**

a. Download a CSV file of your current users.

b. For each user, in the **Employee ID** user attribute column, enter the user's employee ID:

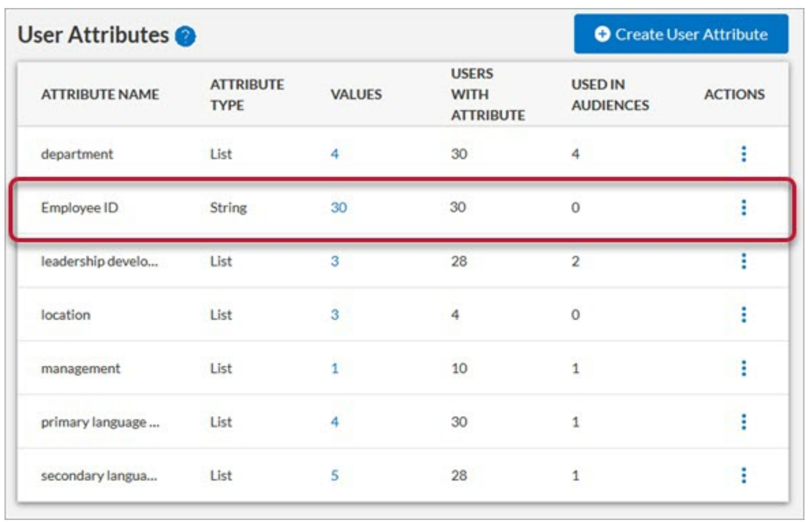


	A	B	C	D	E	F	G	H	I	J	K	L
1	loginName	externalUserId	firstName	lastName	email	role	status	department	Employee ID	eadership development	location	management
2	kadler	kadler	Kezia	Adler	kadler@akara.com	learner	active	human resources		ntermediate	paris	TRUE
3	percipio_admin	percipio_admin	Percipio	Admin	admin@akara.com	siteadmin	active	human resources		ntermediate	boston	TRUE
4	eaolis	eaolis	Ezekiel	Aolis	eaolis@akara.com	learner	active	human resources				TRUE
5	sbellum	sbellum	Sarah	Bellum	sbellum@akara.com	learner	active	human resources		eginner		TRUE
6	ebrown	ebrown	Emily	Brown	ebrown@akara.com	learner	active	product management		ntermediate		TRUE
7	mcampbell	mcampbell	Melissa	Campbell	mcampbell@akara.com	learner	active	product management		dvanced		TRUE
8	jcox	jcox	Jacey	Cox	jcox@akara.com	learner	active	human resources		eginner		TRUE
9	cfate	cfate	Celia	Fate		siteadmin	active	human resources		dvanced		TRUE
10	cgrimshaw	cgrimshaw	Carlton	Grimshaw	cgrimshaw@akara.com	learner	active	sales		ntermediate		
11	ljohannson	ljohansson	Lyvia	Johannson	ljohannson@akara.com	learner	active	human resources		ntermediate		
12	nkilkurn	NancyScanlon	Nancy	Kilkurn	nyscanlon@akara.com	learner	active	product management			paris	
13	ykonector	ykonector	Yuri	Konector	ykonector@akara.com	learner	active	development		dvanced		TRUE
14	t_lewis	t_lewis	Tom	Lewis	tlewis@akara.com	learner	active					
15	imacdonough	imacdonough	Ina	MacDonough	imacdonough@akara.com	learner	active	development		dvanced		
16	jmarkham	jmarkham	Justin	Markham	jmarkham@akara.com	siteadmin	active	development		dvanced		
17	rmayaguez	rmayaguez	Roberto	Mayaguez	rmayaguez@akara.com	teammanager	active	development		eginner		
18	smishra	smishra	Sujit	Mishra	smishra@akara.com	learner	active	development		eginner		
19	smuller	smuller	Sofia	MÃ¼ller	smuller@akara.com	learner	active	human resources		dvanced		
20	smurdalla	smurdalla	Sal	Murdalla	smurdalla@akara.com	learner	active	sales		ntermediate		
21	KimMurphy	KimMurphy	Kimberly	Murphy	Kim.Murphy@akara.com	learner	active					
22	kporter	kporter	Clint	Porter	kporter@akara.com	learner	active	sales		dvanced		
23	rprahalad	rprahalad	Riya	Prahalad	rprahalad@akara.com	learner	active	human resources		ntermediate		
24	orodriguez	orodriguez	Olivia	Rodriguez	orodriguez@akara.com	learner	active	human resources		eginner		
25	brogers	brogers	Bruce	Rogers	brogers@akara.com	learner	active	development		dvanced		
26	gschmidt	gschmidt	Gerhard	Schmidt	gschmidt@akara.com	siteadmin	active	sales		dvanced		
27	esmithson	esmithson	Emmy	Smithson	esmithson@akara.com	siteadmin	active	development		dvanced		
28	cthompson	cthompson	Chloe	Thompson	cthompson@akara.com	siteadmin	active	development		dvanced		
29	jwestin	jwestin	Jeff	Westin	jwestin@akara.com	learner	active	sales		eginner		
30	hwilson	hwilson	Hannah	Wilson	hwilson@akara.com	siteadmin	active	human resources		dvanced		
31	jyuss	jyuss	Jean	Yuss	jyuss@akara.com	siteadmin	active	sales		dvanced		
32												

Each entry becomes a value of the **Employee ID** attribute.

c. Save and import your CSV file to Percipio.

The User Attributes page updates the **Values** and **Users with Attributes** columns:



User Attributes

Create User Attribute

ATTRIBUTE NAME	ATTRIBUTE TYPE	VALUES	USERS WITH ATTRIBUTE	USED IN AUDIENCES	ACTIONS
department	List	4	30	4	
Employee ID	String	30	30	0	
leadership develo...	List	3	28	2	
location	List	3	4	0	
management	List	1	10	1	
primary language ...	List	4	30	1	
secondary langua...	List	5	28	1	

4. Once you've added values to the attribute, on the User Attributes page, click the number in the **Values** column to view all entered values for the **Employee ID** String attribute.


User Attributes > Edit User Attribute
Edit User Attribute
User Attribute details
* Required Field
Attribute name *
Employee ID
Attribute type
String
User Attribute values
Search for values in this list
Enter a search term
VALUES
43-211
43-212
43-213
43-214
43-215
43-216
43-217
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43-219
43-220
43-221
43-222
43-223
43-224
43-225
43-226
43-227
43-228
43-229
43-230
43-231
43-232
43-233
43-234
43-235
43-236
43-237
43-238
43-239
43-240
rows per page 50
1 – 30 of 30

Create a String Attribute

Use the String attribute type if your values are unique to each user, or if you require unlimited values (for example, employee IDs, national insurance numbers, or job titles). Values for this attribute are automatically populated based on data entered within user profiles (via the Create New User page, the Edit User page, or the Import User page).

1. On the Admin menu, click **USERS > User Attributes.** The User Attributes page displays.
2. On the User Attributes page, click **New Attribute**. The Create User Attribute page displays.
3. Enter a **Name** for the attribute.
    - This is a required field and must be unique within an organization.
    - The field limit is 255 characters.
4. Select **String**.
5. If you are using self registration and want this attribute to display in a user's browser language, select the language and specify the **Display Label** for that language. If you do not specify a Display label in a user's language, self registration displays the attribute in English.
6. Click **Create**. The attribute saves.

Note: To add values to this attribute type, you must create the value within a user's profile. See Assign a String attribute.

Assign a String Attribute

Because the String attribute values are user-specific (the attribute is assigned to multiple users, but each value of the attribute can be assigned to a single user), you must create the value within a user's profile.

To assign a String attribute to an individual user

If a new user

1. Click **USERS > User Management**.
2. Click **New User**. The Create User page displays.
3. Complete all required fields.
4. In the User Attributes section, locate the String attribute.
5. Enter a value.
6. Click **Create**. The value is added to the attribute, and the attribute is assigned to the user.

If an existing user

1. Click **USERS > User Management**.
2. Locate the user you want to edit.
3. In the **Actions** column, click ⋮ > ✎. The Edit User page displays.
4. In the User Attributes section, locate the String attribute.
5. Enter a value.
6. Click **Update**. The value is added to the attribute, and the attribute is assigned to the user.

To assign a String attribute to multiple users

If bulk uploading many new users

1. Click **USERS > User Management**.
2. Click **Download Template** to download a blank CSV file.

3. Once downloaded, open the CSV file and enter your users' data. For details about the fields, see Download a CSV File.
4. In the column with the header name that matches your String attribute, enter a value for each user.
5. Save the CSV file.
6. On the User List page, click **Import**.
7. Click the **PREVALIDATE** tab.
8. Click **Browse** to locate your CSV file.
9. Click **Prevalidate users**.
10. Fix any errors that may occur. See Bulk Import Error Messages for details.
11. Click the **IMPORT** tab.
12. Click **Import**. The values are added to the attribute, and the attribute is assigned to the users.

If bulk updating many existing users

1. Click **USERS > User Management**.
2. Click **Download List** to download a CSV file containing all of your users and their profile data.
3. Once downloaded, open the CSV file.
4. Locate the column with the header name that matches your String attribute.
5. Enter a value for each user.
6. Save the CSV file.
7. On the User List page, click **Import**.

8. Click the **PREVALIDATE** tab.
9. Click **Browse** to locate your CSV file.
10. Click **Prevalidate users**.
11. Fix any errors that may occur. See Bulk Import Error Messages for details.
12. Click the **IMPORT** tab.
13. Click **Import**. The values are added to the attribute, and the attribute is assigned to the users.

If updating existing users and adding new users at the same time

1. Click **USERS > User Management**.
2. Click **Download List** to download a CSV file containing all of your users and their profile data.
3. Once downloaded, open the CSV file and enter additional new user data at the bottom of the list.
4. Locate the column with the header name that matches your String attribute.
5. Enter a value for the attribute in each user row.
6. Save the CSV file.
7. On the User List page, click **Import**.
8. Click the **PREVALIDATE** tab.
9. Click **Browse** to locate your CSV file.
10. Click **Prevalidate users**.

11. Fix any errors that may occur. See Bulk Import Error Messages for details.
12. Click the **IMPORT** tab.
13. Click **Import**. The values are added to the attribute, and the attribute is assigned to the users.

Once you've assigned the String attribute, return to the User Attributes list (**USERS > User Attributes**) and locate it in the list. It now displays the number of values assigned to the attribute, and when you click that number, a list of all values for the attribute display.

List Attribute

Use the List attribute if the values you need to create are shared by users (for example, job roles, office locations, or departments).

You can also use the list attribute to assign multiple values to a user. For example, you might want to assign a user to more than one location if they split their time between the two.

You can add as many values as you want to a list attribute, but we recommend no more than 50 in order to successfully manage the list. If you have more than 50 values, consider using the String type attribute.

> **Note**: Instead of using a list attribute to contain a user's Manager's email address or name, we recommend that you use the Percipio User Attribute type. If you use a the Percipio user attribute and use team automation, the manager will be assigned as the audience owner.

Using a List attribute (example)

> Your company has a set of courses contained in a Percipio assignment that all employees in the engineering department must complete. You have other departments in your company that do not need this assignment, but may require other assignments in the future.

Segment the engineers into their own audience by first assigning them the value of a list attribute designated just to engineers, and then using that value to create an audience. When you create new users in Percipio and assign them that value, those new users are automatically assigned the audience's assignment.

To do this:

1. Create a List attribute and name it **department**.
2. Add values to the **department** attribute, and name them **engineering**, **HR**, **sales** and **finance**.
3. Create a new audience and name it **Engineering**.
4. Select the **department** user attribute from the drop-down list.
5. Select **engineering** as the attribute's value.
6. Assign the onboarding assignment to the **Engineering** audience.

   As you add users to your Percipio site, set their **department** attribute to **engineering**. This adds them to the **Engineering** audience and automatically assigns the engineering assignment to the newly-added users.

Create a List Attribute

Use the List attribute if the values you need to create are shared by users (for example, job roles, office locations, or departments). You can add unlimited values to the List attribute.

1. On the Admin menu, click **USERS > User Attributes.** The User Attributes page displays.
2. On the User Attributes page, click **New Attribute**. The Create User Attribute page displays.
3. Enter a **Name** for the attribute.
   - This is a required field and must be unique within an organization.
   - The field limit is 255 characters.
4. Select **List**.
5. If you are using self registration and want this attribute to display in a user's browser language, select the language and specify the **Display Label** for that language. If you do not specify a Display label in a user's language, self registration displays the attribute in English.
6. Optionally, select **Authorize direct creation of new values.**
   - **Selected:** Allow other admins to create new values for an attribute when they create a new user or edit an existing user. If selected, you do not need to specify an attribute value. This setting is helpful when bulk uploading users with new values, or for Compliance admins who want to send emails to users' supervisors.
   - **Not selected:** Do not allow other admins to create new values for an attribute when they create a new user or edit an existing user. Admins can only select from predefined values when assigning an attribute to a user. If this is not selected, you must specify at least one value for the attribute.
7. Optionally, select **Allow multiple values to be selected for this attribute**. If you save a list attribute with this feature selected, you can't unselect it.

- **Selected**: Allows a user to have more than one value associated to this attribute. There is no limit to the number of values you can associate to one user.
- **Not selected**: Default setting. User can only have one value associated with the attribute.

8. Create one or more values for the attribute:
   a. Enter a name for the value.
   b. Click **Add Value** or press **Enter**. The value displays in the attribute list.
   c. Repeat as necessary.
9. Select **Create**.

Assign a List Attribute

To assign a List attribute to a new user

1. Select **USERS > User Management**.
2. Select **New User**.
3. Enter the information for the user profile. See Create a New User for details about these fields.
4. In the User Attributes section, locate the List attribute.
5. Select a value.
   - If direct creation of new values is authorized, you can enter a new value.
   - If Allow multiple values to be selected for this attribute is selected, you can choose to select more than one value.
6. Select **Create**.

To assign your List attribute to an existing user

1. Select **USERS > User Management**.
2. Locate the user you want to edit.
3. In the **Actions** column, select ⋮ > ✏. The Edit User page displays.
4. In the User Attributes section, locate your List attribute.
5. Select a value.
   - If direct creation of new values is authorized, you can enter a new value.
   - If Allow multiple values to be selected for this attribute is selected, you can choose to select more than one value.
6. Select **Update**.

To assign a List attribute to multiple new users

1. Select **USERS > User Management**.
2. Select **Download Template** to download a blank CSV file.
3. Once downloaded, open the CSV file and enter your users' data. For details about the fields, see Download a CSV File.
4. In the column with the header name that matches your List attribute, enter an existing value for each user.
   - If direct creation of new values is authorized, you can enter a new value.
   - If a custom list attribute has the Allow multiple values to be selected for this attribute option selected, you can specify

multiple values for an individual user by separating each value with a | (pipe) character.

5. Save the CSV file.
6. On the User List page, select **Import**.
7. Select the **PREVALIDATE** tab.
8. Select **Browse** to locate your CSV file.
9. Select **Prevalidate users**.
10. Fix any errors that may occur. See Bulk Import Error Messages for details.
11. Select the **IMPORT** tab.
12. Select **Import**.

Assign your List attribute to multiple existing users

1. Select **USERS > User Management**.
2. Select **Download List** to download a CSV file containing all of your users and their profile data.
3. Once downloaded, open the CSV file and locate the column with the header name that matches your List attribute.
4. Enter an existing value for each user.
    - If direct creation of new values is authorized, you can enter a new value.
    - If a custom list attribute has the Allow multiple values to be selected for this attribute option selected, you can specify multiple values for an individual user by separating each value with a | (pipe) character..

5. Save the CSV file.
6. On the User List page, select **Import**.
7. Select the **PREVALIDATE** tab.
8. Select **Browse** to locate your CSV file.
9. Select **Prevalidate users**.
10. Fix any errors that may occur. See Bulk Import Error Messages for details.
11. Select the **IMPORT** tab.
12. Select **Import**.

Once you've assigned the List attribute, return to the User Attributes list (**USERS > User Attributes**) and locate it in the list. It now displays the number of users assigned to the attribute., You can select the number in the Values column to see a list of all values for the attribute.

Percipio User Attribute

Use the Percipio User attribute to represent the relationship between two or more Percipio user IDs that you want validated against the database (for example the relationship between a manager and his employees, a supervisor and her employees, an HR partner and an employee, or a mentor and his mentees).

This attribute can be used in team automation rules to automatically create and maintain audiences. When you create audiences using the Percipio User attribute type, Percipio assigns these audiences the Percipio user listed in this attribute as the owner of the audience.

Using a Percipio User attribute (example)

You want to create audiences of users who report to each of your company's three managers:

- Keira Adler, whose Percipio user ID is **k_adler**,
- Jane Doe, whose Percipio user ID is **j_doe**, and
- Pat Smith, whose Percipio user ID is **p_smith.**

In this example, you want to update all of the users in your company, so using the Bulk Import feature is the most efficient way to update.

To do this:

1. Create a Percipio User attribute and name it **manager**.
2. Download a CSV file of your current users.
3. For each learner, in the **manager** column, enter the User ID of the user's manager (**k_adler**, **j_doe**, or **p_smith**).

   Each entry becomes a value of the **manager** attribute. This ensures Percipio validates the user ID of your learners against the user ID of the specified managers.

4. Save and import your CSV file to Percipio.
5. Create a new audience.
6. Click **Add user attributes**.
7. In the Attribute drop-down, select **manager**.
8. In the Attribute values drop-down, select **k_adler** to create the audience for Keira Adler, which contains only those learners associated with her Percipio user ID.

9. Click **Done**. The audience is created and contains only those learners who report to Keira Adler.
10. Repeat steps 5-9 for the other two managers to create their specific audiences.

    Now, if anything changes with any of the users, (such as change job roles, become inactive within Percipio, or leave the company), you can update their value from k_adler to another manager's user ID to easily update the audiences.

Create a Percipio User Attribute

Use the Percipio User attribute if the values will represent the relationship between an audience and a Percipio user (for example, a manager, a supervisor, an HR partner, a division head, or a mentor). Values for this attribute are automatically populated based on data entered within user profiles (via the Create New User page, the Edit User page, or the Import User page).

1. On the Admin menu, click **USERS > User Attributes.** The User Attributes page displays.
2. On the User Attributes page, click **New Attribute**. The Create User Attribute page displays.
3. Enter a **Name** for the attribute.
    - This is a required field and must be unique within an organization.
    - The field limit is 255 characters.
4. Select **Percipio User**.
5. Click **Create**. The attribute saves.

> **Note:** To add values to this attribute type, you must create the value within a user's profile. See Assign a Percipio User Attribute.

Assign a Percipio User Attribute

Because the Percipio User attribute values are user-specific (the attribute is assigned to multiple users, but each value of the attribute is typically only assigned to a single user), you must create the value within a user's profile.

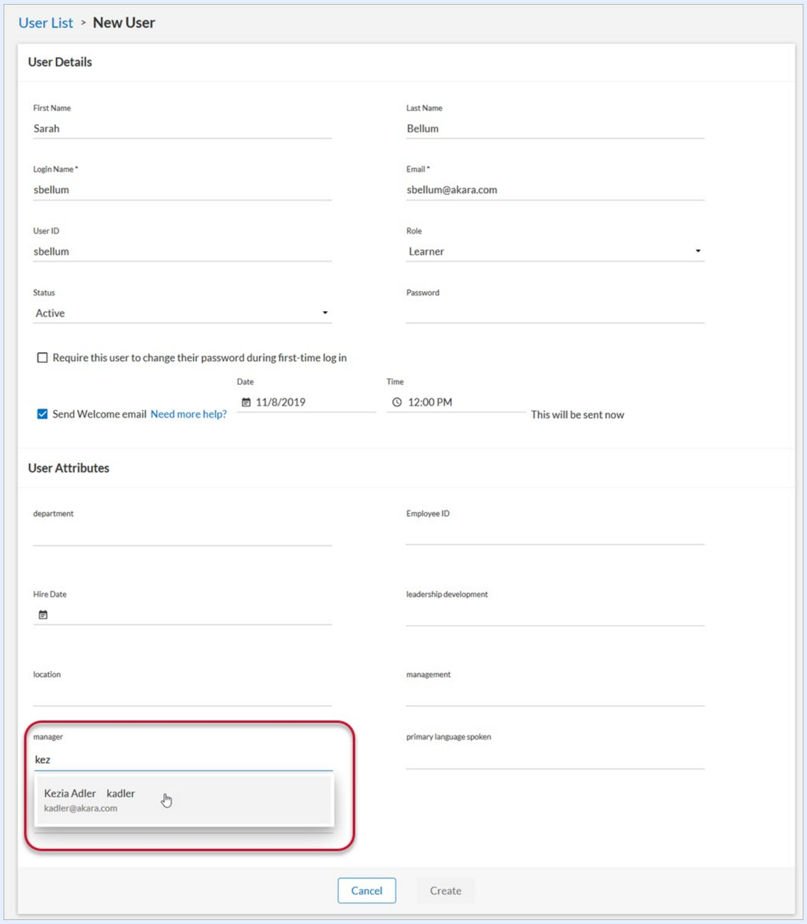
To assign a Percipio User attribute to an individual user

If a new user

1. Click **USERS > User Management**.
2. Click **New User**. The Create User page displays.
3. Complete all required fields.
4. In the User Attributes section, locate the **Percipio User** attribute.
5. Type in a corresponding user ID or email address. (For example, if the Percipio User attribute is **manager**, enter the user ID or email address of the user's manager. The email address must be associated with the manager's profile in Percipio.) This becomes a value of the attribute.
6. Click **Create**. The user ID is added to the attribute, and the attribute is assigned to the user.

> **Example**
> You create a new user named Sarah Bellum. She reports directly to Kezia Adler (whose user ID within Percipio is ka_adler), so you want to create an association from Sarah to Kezia because this association is used when creating audiences, and you want Sarah to be in Kezia's audience for assignments and reporting data.
>
> On the Create User page, when creating Sarah's user

profile, you would begin typing her manager's name in the **manager** attribute field and select it from the drop-down.



If an existing user

1. Click **USERS > User Management**.
2. Locate the user you want to edit.
3. In the **Actions** column, click ⋮ > ✎. The Edit User page displays.
4. In the User Attributes section, locate the Percipio User attribute.

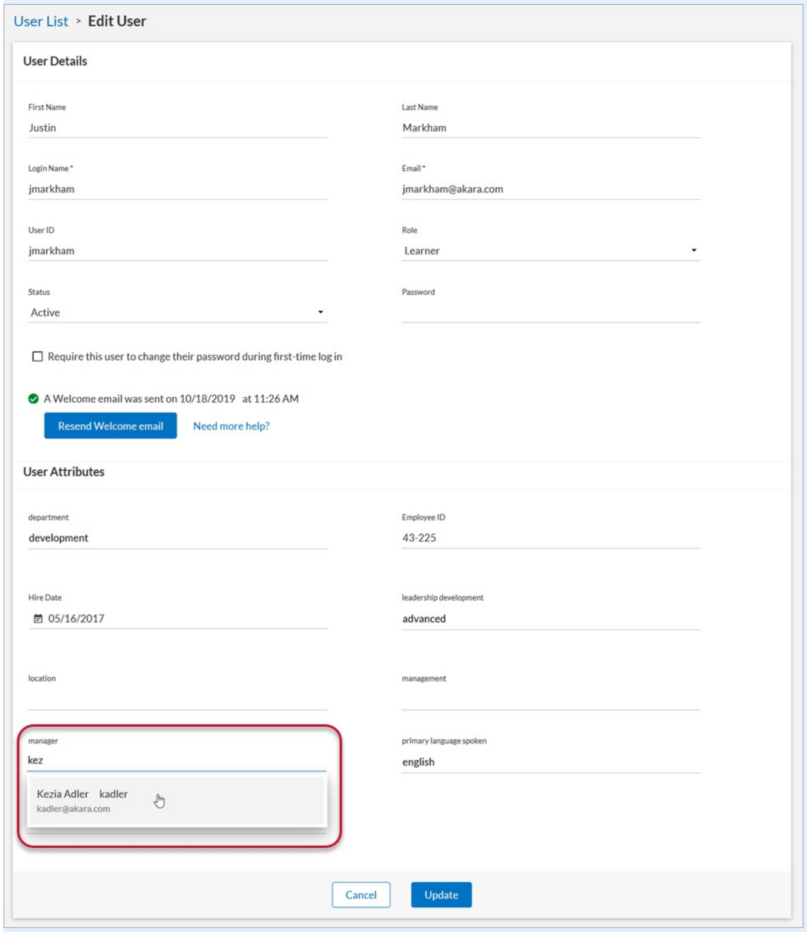
5. Type in a corresponding user ID. (For example, if the Percipio User attribute is **manager**, enter the user ID of the user's manager.) This becomes a value of the attribute.
6. Click **Update**. The value is added to the attribute, and the attribute is assigned to the user.

Example

You edit an existing user named Justin Markham. He recently moved team and now reports directly to Kezia Adler (whose user ID within Percipio is ka_adler), so you want to create an association from Justin to Kezia because this association is used when creating audiences, and you want Justin to be in Kezia's audience for assignments and reporting data.

On the Edit User page, when modifying Justin's user profile, you would begin typing his manager's name in the

manager attribute field and select it from the drop-down.



To assign a Percipio User attribute to multiple users

If bulk importing many new users

1. Click **USERS > User Management**.
2. Click **Download Template** to download a blank CSV file.
3. Once downloaded, open the CSV file and enter your users' data. For details about the fields, see [Download a CSV File](#).
4. In the column with the header name that matches your Percipio User attribute, enter an existing, corresponding user ID. (For

example, if the Percipio User attribute is **manager**, enter the user ID of the user's manager. The manager must already be set up in Percipio.) User IDs entered here become values of the attribute.

5. Save the CSV file.
6. On the User List page, click **Import**.
7. Click the **PREVALIDATE** tab.
8. Click **Browse** to locate your CSV file.
9. Click **Prevalidate users**.
10. Fix any errors that may occur. See Bulk Import Error Messages for details.
11. Click the **IMPORT** tab.
12. Click **Import**. The values are added to the attribute, and the attribute is assigned to the users.

If bulk importing many existing users

1. Click **USERS > User Management**.
2. Click **Download List** to download a CSV file containing all of your users and their profile data.
3. Once downloaded, open the CSV file.
4. In the column with the header name that matches your Percipio User attribute, enter an existing, corresponding user ID. (For example, if the Percipio User attribute is **manager**, enter the user ID of the user's manager. The manager must already be set up in Percipio.) User IDs entered here become values of the attribute.

5. Save the CSV file.
6. On the User List page, click **Import**.
7. Click the **PREVALIDATE** tab.
8. Click **Browse** to locate your CSV file.
9. Click **Prevalidate users**.
10. Fix any errors that may occur. See Bulk Import Error Messages for details.
11. Click the **IMPORT** tab.
12. Click **Import**. The values are added to the attribute, and the attribute is assigned to the users.

If updating existing users and adding new users at the same time

1. Click **USERS > User Management**.
2. Click **Download List** to download a CSV file containing all of your users and their profile data.
3. Once downloaded, open the CSV file and enter additional new user data at the bottom of the list.
4. In the column with the header name that matches your Percipio User attribute, enter an existing, corresponding user ID. (For example, if the Percipio User attribute is **manager**, enter the user ID of the user's manager. The manager must already be set up in Percipio.) User IDs entered here become values of the attribute.
5. Save the CSV file.
6. On the User List page, click **Import**.

7. Click the **PREVALIDATE** tab.
8. Click **Browse** to locate your CSV file.
9. Click **Prevalidate users**.
10. Fix any errors that may occur. See Bulk Import Error Messages for details.
11. Click the **IMPORT** tab.
12. Click **Import**. The values are added to the attribute, and the attribute is assigned to the users.

Once you've assigned the Percipio User attribute, return to the User Attributes list (**USERS > User Attributes**) and locate it in the list. It now displays the number of values assigned to the attribute, and when you click that number, a list of all values for the attribute display.

Date Attribute

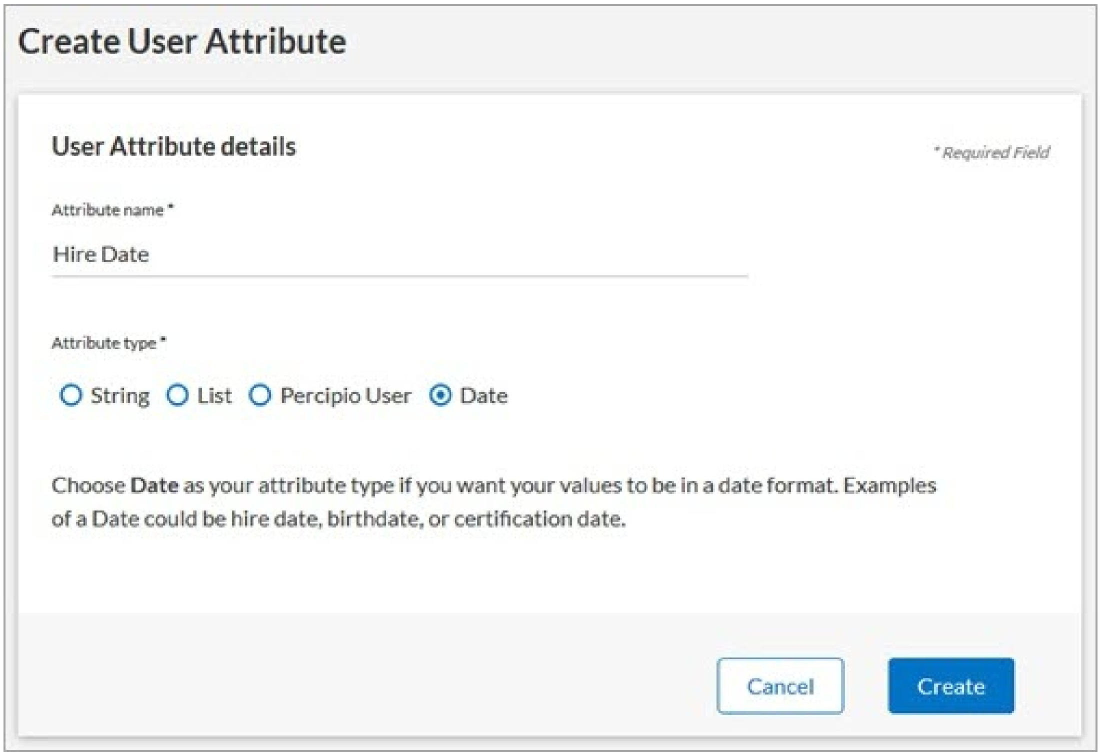
Use the Date attribute if you want your values to be in a date format (for example, a hire date, a birth date, or a certification date).

Using a Date attribute (example)

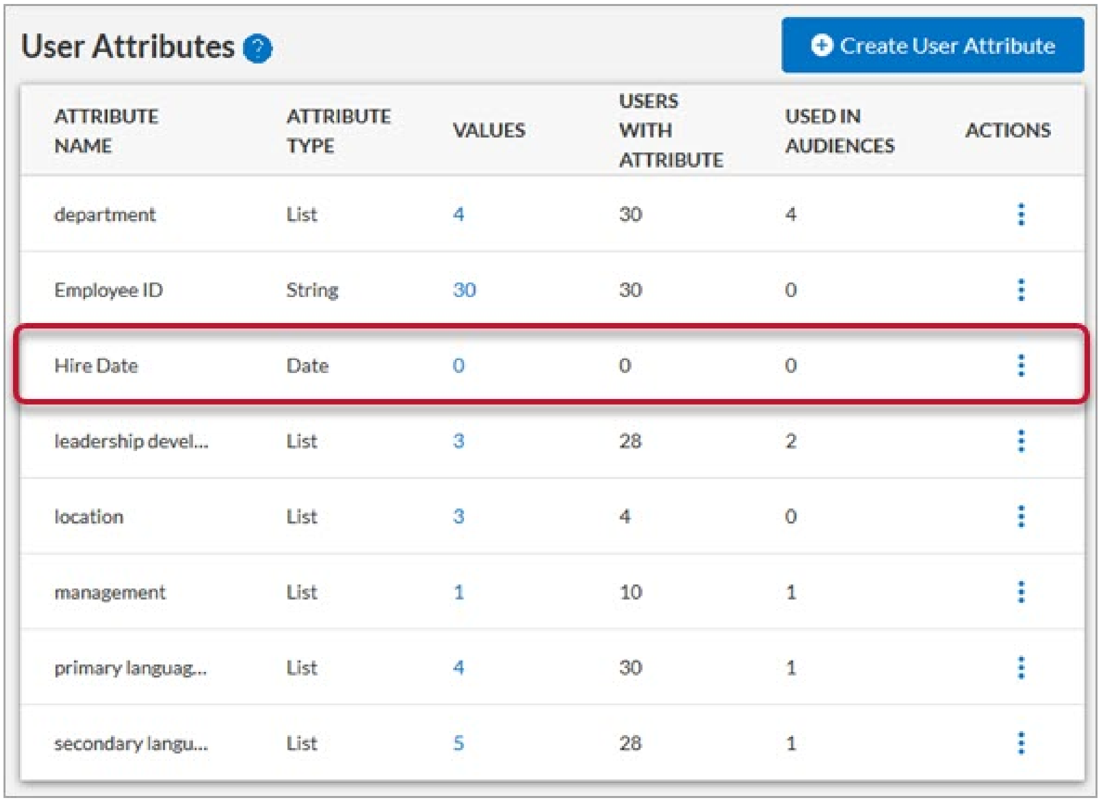
> You want to capture the hire date of your users, so that you can create an audience of all users hired during your organization's fiscal year.

To do this:

1. Create a Date attribute and name it **Hire Date**.



Once created, the new **Hire Date** attribute displays on the User Attributes page, but without any values:


User Attributes

Create User Attribute

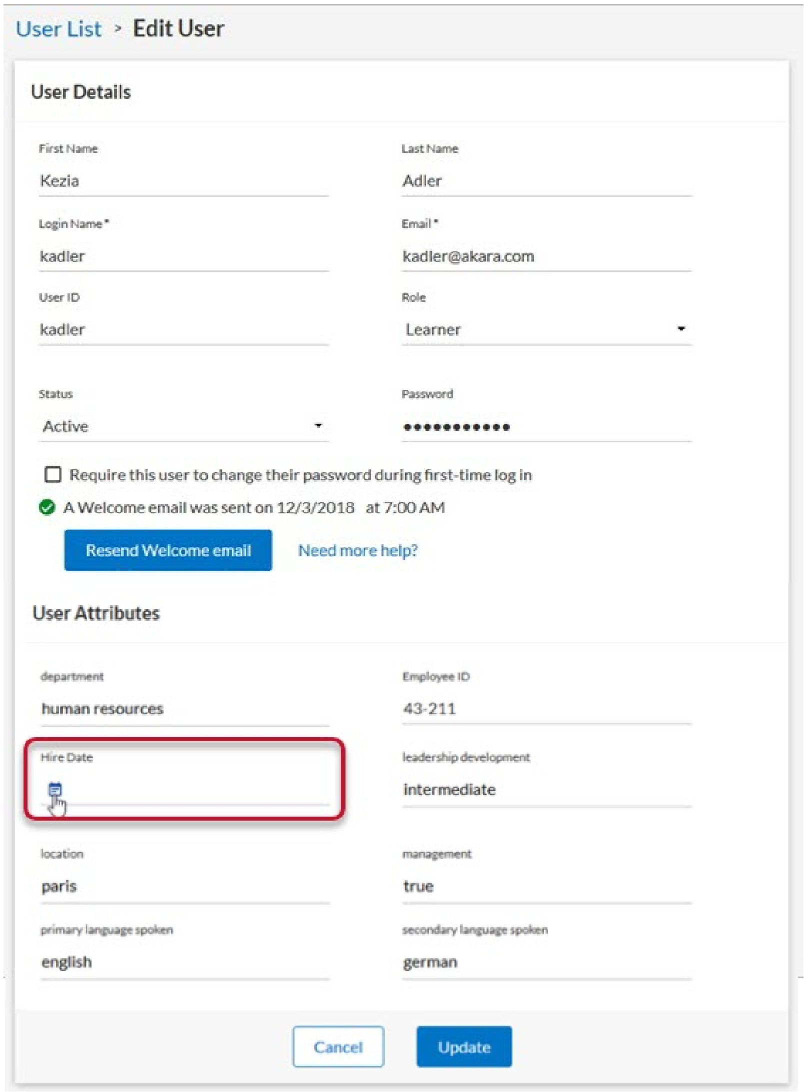
ATTRIBUTE NAME	ATTRIBUTE TYPE	VALUES	USERS WITH ATTRIBUTE	USED IN AUDIENCES	ACTIONS
department	List	4	30	4	⋮
Employee ID	String	30	30	0	⋮
Hire Date	Date	0	0	0	⋮
leadership devel...	List	3	28	2	⋮
location	List	3	4	0	⋮
management	List	1	10	1	⋮
primary languag...	List	4	30	1	⋮
secondary langu...	List	5	28	1	⋮

2. **Add a Hire Date for an individual user.**

   a. On the **USERS > User Management** page, locate the user you want to edit.

   b. In the **Actions** column, click ⋮ > . The Edit User page displays.

   c. In the User attributes section, in the Hire Date attribute field, click .

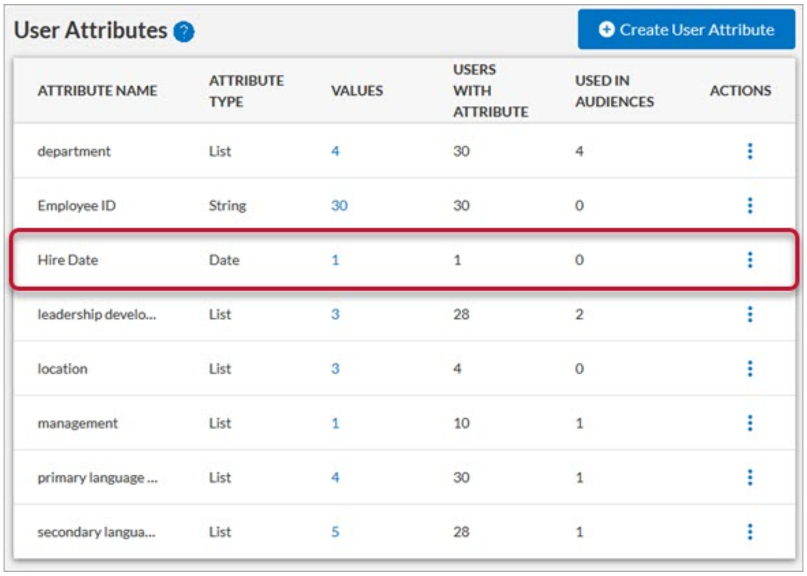


d. Select a date from the calendar.

The selected date becomes a value for the **Hire Date** attribute.

e. Click **Update**.

The User Attributes page updates the **Values** column:



User Attributes

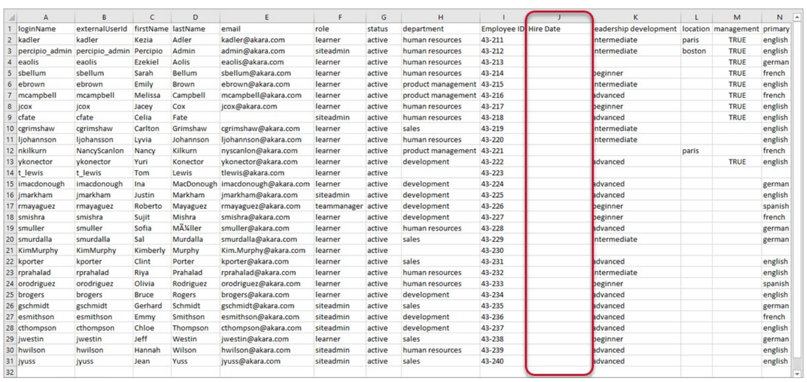
Create User Attribute

ATTRIBUTE NAME	ATTRIBUTE TYPE	VALUES	USERS WITH ATTRIBUTE	USED IN AUDIENCES	ACTIONS
department	List	4	30	4	⋮
Employee ID	String	30	30	0	⋮
Hire Date	Date	1	1	0	⋮
leadership develo...	List	3	28	2	⋮
location	List	3	4	0	⋮
management	List	1	10	1	⋮
primary language ...	List	4	30	1	⋮
secondary langua...	List	5	28	1	⋮

3. **Add a Hire Date for multiple users at once.**

   a. [Download a CSV file](#) of your current users.

   b. For each user, in the **Hire Date** user attribute column, enter the user's hire date in one of the [approved formats](#):

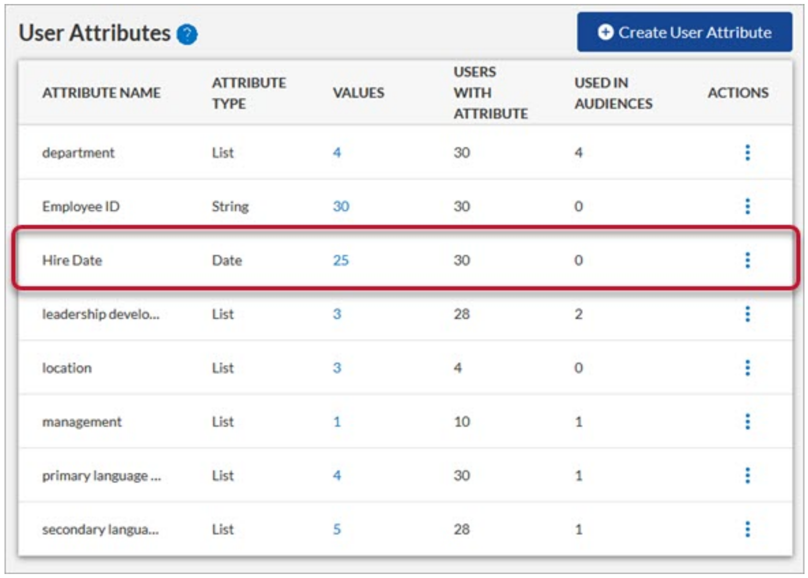


	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	loginName	externalUserId	firstName	lastName	email	role	status	department	Employee ID	Hire Date	eadership development	location	management	primary
2	kadler	kadler	Kezia	Adler	kadler@akara.com	learner	active	human resources	43-211		intermediate	paris	TRUE	english
3	percipio_admin	percipio_admin	Percipio	Admin	admin@akara.com	siteadmin	active	human resources	43-212		intermediate	boston	TRUE	english
4	eaolis	eaolis	Ezekiel	Aolis	eaolis@akara.com	learner	active	human resources	43-213				TRUE	german
5	sbellum	sbellum	Sarah	Bellum	sbellum@akara.com	learner	active	human resources	43-214		beginner		TRUE	french
6	ebrown	ebrown	Emily	Brown	ebrown@akara.com	learner	active	product management	43-215		intermediate		TRUE	english
7	mcampbell	mcampbell	Melissa	Campbell	mcampbell@akara.com	learner	active	product management	43-216		advanced		TRUE	french
8	jcox	jcox	Jacey	Cox	jcox@akara.com	learner	active	human resources	43-217		beginner		TRUE	english
9	cfate	cfate	Celia	Fate		siteadmin	active	human resources	43-218		advanced		TRUE	english
10	cgrimshaw	cgrimshaw	Carlton	Grimshaw	cgrimshaw@akara.com	learner	active	sales	43-219		intermediate			english
11	ljohannson	ljohansson	Lyvia	Johannson	ljohannson@akara.com	learner	active	human resources	43-220		intermediate			english
12	nkilkurn	NancyScanlon	Nancy	Kilkurn	nyscanlon@akara.com	learner	active	product management	43-221			paris		french
13	ykonector	ykonector	Yuri	Konector	ykonector@akara.com	learner	active	development	43-222		advanced		TRUE	english
14	t_lewis	t_lewis	Tom	Lewis	tlewis@akara.com	learner	active		43-223					
15	imacdonough	imacdonough	Ina	MacDonough	imacdonough@akara.com	learner	active	development	43-224		advanced			german
16	jmarkham	jmarkham	Justin	Markham	jmarkham@akara.com	siteadmin	active	development	43-225		advanced			english
17	rmayaguez	rmayaguez	Roberto	Mayaguez	rmayaguez@akara.com	teammanager	active	development	43-226		beginner			spanish
18	smishra	smishra	Sujit	Mishra	smishra@akara.com	learner	active	development	43-227		beginner			french
19	smuller	smuller	Sofia	MÃ¼ller	smuller@akara.com	learner	active	human resources	43-228		advanced			german
20	smurdalla	smurdalla	Sal	Murdalla	smurdalla@akara.com	learner	active	sales	43-229		intermediate			german
21	KimMurphy	KimMurphy	Kimberly	Murphy	Kim.Murphy@akara.com	learner	active		43-230					
22	kporter	kporter	Clint	Porter	kporter@akara.com	learner	active	sales	43-231		advanced			english
23	rprahalad	rprahalad	Riya	Prahalad	rprahalad@akara.com	learner	active	human resources	43-232		intermediate			english
24	orodriguez	orodriguez	Olivia	Rodriguez	orodriguez@akara.com	learner	active	human resources	43-233		beginner			spanish
25	brogers	brogers	Bruce	Rogers	brogers@akara.com	learner	active	development	43-234		advanced			english
26	gschmidt	gschmidt	Gerhard	Schmidt	gschmidt@akara.com	siteadmin	active	sales	43-235		advanced			german
27	esmithson	esmithson	Emmy	Smithson	esmithson@akara.com	siteadmin	active	development	43-236		advanced			french
28	cthompson	cthompson	Chloe	Thompson	cthompson@akara.com	siteadmin	active	development	43-237		advanced			english
29	jwestin	jwestin	Jeff	Westin	jwestin@akara.com	learner	active	sales	43-238		beginner			german
30	hwilson	hwilson	Hannah	Wilson	hwilson@akara.com	siteadmin	active	human resources	43-239		advanced			english
31	jyuss	jyuss	Jean	Yuss	jyuss@akara.com	siteadmin	active	sales	43-240		advanced			english
32														

   Each entry becomes a value of the **Hire Date** attribute.

   c. Save and [import your CSV file](#) to Percipio.

   The User Attributes page updates the **Values** and **Users with Attribute** columns:



User Attributes

Create User Attribute

ATTRIBUTE NAME	ATTRIBUTE TYPE	VALUES	USERS WITH ATTRIBUTE	USED IN AUDIENCES	ACTIONS
department	List	4	30	4	⋮
Employee ID	String	30	30	0	⋮
Hire Date	Date	25	30	0	⋮
leadership develo...	List	3	28	2	⋮
location	List	3	4	0	⋮
management	List	1	10	1	⋮
primary language ...	List	4	30	1	⋮
secondary langua...	List	5	28	1	⋮

4. [Create a new audience]() and name it **FY2019 Hires**.
5. In the Define your audience section, click **Add user attributes**.
6. Select **Hire Date** user attribute from the Attribute 1 drop-down list.
7. Select **Between** from the Operator drop-down list.
8. Enter a start date of the first day of your organization's fiscal year (for this example, we use 01/01/2019).
9. Enter and end date of your organization's fiscal year (for this example, we use 12/31/2019).
10. Click **Done**.
11. Click **Create Audience**. You can now create assignments for all users hired during your organization's specified fiscal year.

Create a Date Attribute

Use the Date attribute type if you want to identify users by specific dates (for example, hire date, birth date, or certification date). Values for this attribute are automatically populated based on data entered within user profiles (via the Create New User page, the Edit User page, or the Import User page).

1. On the Admin menu, click **USERS > User Attributes.** The User Attributes page displays.
2. On the User Attributes page, click **New Attribute**. The Create User Attribute page displays.
3. Enter a **Name** for the attribute.
    - This is a required field and must be unique within an organization.
    - The field limit is 255 characters.
4. Select **Date**.
5. If you are using self registration and want this attribute to display in a user's browser language, select the language and specify the **Display Label** for that language. If you do not specify a Display label in a user's language, self registration displays the attribute in English.
6. Click **Create**. The attribute saves.

> **Note:** To add values to this attribute type, you must create the value within a user's profile. See Assign a Date Attribute.

Assign a Date Attribute

Values for this attribute are automatically populated based on data entered within user profiles (via the Create New User page, the Edit User page, or the Import User page).

To assign a Date attribute to an individual user

If a new user

1. Click **USERS > User Management**.
2. Click **New User**.

3. Enter the information for the user profile. See [Create a New User](#) for details about these fields.
4. In the User Attributes section, locate your Date attribute.
5. In the value field, click .
6. Select the date you want associated with the user.
7. Click **Create**.

If an existing user

1. Click **USERS > User Management**.
2. Locate the user you want to edit.
3. In the **Actions** column, click > . The Edit User page displays.
4. In the User Attributes section, locate your Date attribute.
5. In the value field, click .
6. Select the date you want associated with the user.
7. Click **Update**.

To assign a Date attribute to multiple users

Examples of acceptable formats for the bulk import CSV file include:

- 2019-10-31 (this is preferred format)
- 2019-10-31T12:34:78.678Z
- Thurs, 31 Oct 2019 00:18:56 +0000
- Thurs, 31 Oct 2019
- 31 Oct 2019

If bulk uploading many new users

1. Click **USERS > User Management**.
2. Click **Download Template** to download a blank CSV file.
3. Once downloaded, open the CSV file and enter your users' data. For details about the fields, see Download a CSV File.
4. Locate the column with the header name that matches your Date attribute.
5. Enter a date in the attribute's row. Examples of acceptable formats include:
   - 2019-10-31 (this is preferred format)
   - 2019-10-31T12:34:78.678Z
   - Thurs, 31 Oct 2019 00:18:56 +0000
   - Thurs, 31 Oct 2019
   - 31 Oct 2019
6. Save the CSV file.
7. On the User List page, click **Import**.
8. Click the **PREVALIDATE** tab.
9. Click **Browse** to locate your CSV file.
10. Click **Prevalidate users**.
11. Fix any errors that may occur. See Bulk Import Error Messages for details.
12. Click the **IMPORT** tab.
13. Click **Import**. The values are added to the attribute, and the attribute is assigned to the users.

If bulk updating many existing users

1. Click **USERS > User Management**.
2. Click **Download List** to download a CSV file containing all of your users and their profile data.
3. Once downloaded, open the CSV file.
4. Locate the column with the header name that matches your Date attribute.
5. Enter a date in the attribute's row. Examples of acceptable formats include:
   - 2019-10-31 (this is preferred format)
   - 2019-10-31T12:34:78.678Z
   - Thurs, 31 Oct 2019 00:18:56 +0000
   - Thurs, 31 Oct 2019
   - 31 Oct 2019
6. Save the CSV file.
7. On the User List page, click **Import**.
8. Click the **PREVALIDATE** tab.
9. Click **Browse** to locate your CSV file.
10. Click **Prevalidate users**.
11. Fix any errors that may occur. See Bulk Import Error Messages for details.
12. Click the **IMPORT** tab.
13. Click **Import**. The values are added to the attribute, and the attribute is assigned to the users.

If bulk updating existing users and adding new users at the same time

1. Click **USERS > User Management**.
2. Click **Download List** to download a CSV file containing all of your users and their profile data.
3. Once downloaded, open the CSV file and enter additional new user data at the bottom of the list.
4. Locate the column with the header name that matches your Date attribute.
5. Enter a date in the attribute's row. Examples of acceptable formats include:
   - 2019-10-31 (this is preferred format)
   - 2019-10-31T12:34:78.678Z
   - Thurs, 31 Oct 2019 00:18:56 +0000
   - Thurs, 31 Oct 2019
   - 31 Oct 2019
6. Save the CSV file.
7. On the User List page, click **Import**.
8. Click the **PREVALIDATE** tab.
9. Click **Browse** to locate your CSV file.
10. Click **Prevalidate users**.
11. Fix any errors that may occur. See Bulk Import Error Messages for details.
12. Click the **IMPORT** tab.
13. Click **Import**. The values are added to the attribute, and the attribute is assigned to the users.

Once you've assigned the Date attribute, return to the User Attributes list (**USERS > User Attributes**) and locate it in the list. It now displays the number of values assigned to the attribute, and when you click that number, a list of all values for that Date attribute display.

Audience Management

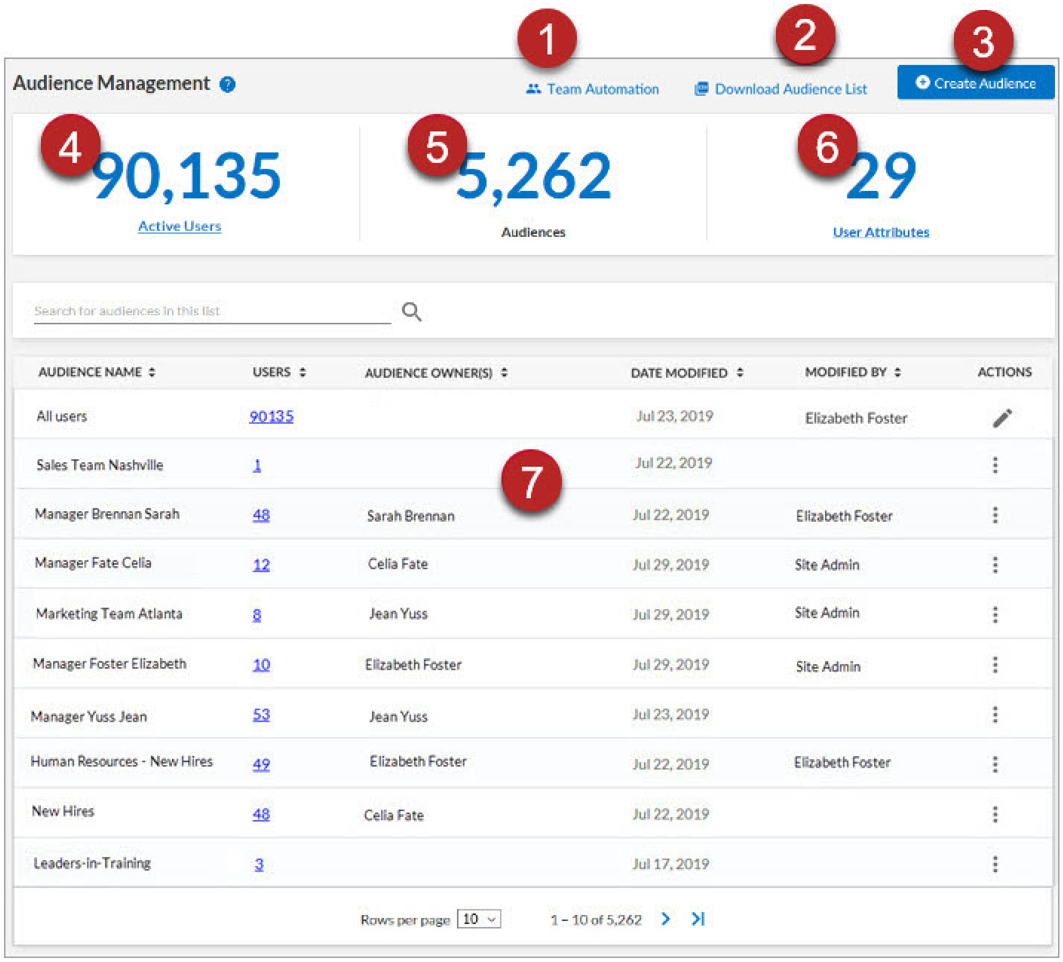
Audiences are a powerful tool for managing learning in Percipio. An audience is a subset of your user population that you define. For each audience you can manage the allocation of licenses, create content assignments, and filter reports.

Audiences can represent a broad segment of your population (for example, everyone in the same business unit or geographic region) or they can be narrow (for example, everyone on a team that shares the same manager). Audiences can be used to represent a new hire class or a group targeted for leadership development training.

There is no limit to the size of your audiences or the number of audiences that you can create in Percipio.

When you create an audience defined by a user attribute, the users in the audience update dynamically based on the value of the user attribute for each user.

Audience Management page



1. **Team Automation:** Click to access the team automation, which automatically creates multiple audiences (called team audiences) using a set of rules based on user attribute values.
2. **Download Audience List:** Click to download a CSV file containing details for each audience, including the audience name, how many users, audience owner, date last modified, who last modified the audience rule, and how many custom channels are associated with the audience.
3. **Create Audience:** Click to create a new audience.
4. **Active Users:** An at-a-glance view at the number of active users across your site.
5. **Audiences:** The number of audiences on your site.

6. **User Attributes:** The total number of user attributes for your site.
7. **Audience list:** Information and actions for all of your audiences.
   - **AUDIENCE NAME:** The name of the audience.
   - **USERS:** The total number of all users (active and inactive) within the audience. Select to see the audience members.
   - **AUDIENCE OWNERS:** Audience owners must have a user role of Learning Admin or Manager. Not all audiences need owners. Owners have the ability to run reports on users in their audience and in some cases make assignments.
   - **DATE MODIFIED:** The date the audience definition was last modified.
   - **MODIFIED BY:** The first and last name of the user who made the last modification.
   - **CUSTOM CHANNELS:**The number of custom channels associated to the audience. Select the number to see which channels are associated to that audience.
   - **ACTIONS**: You can edit or delete an existing audience, unless it is the **All Users** audience.

Frequently asked questions about Audience Management

What is the difference between an audience and a team audience?

An **audience** is created by an admin when they select Create Audience. Admins can add users by selecting either user attribute values or individual users. The admin can optionally select an audience owner who does not share user attribute values with members of the audience.

A **team audience** is an automatically-created audience based solely on user attribute values. If the attribute value is a Percipio user, the user automatically becomes the audience owner. Team audiences are created using team automation, which sets up multiple audiences at once based on a set of rules. Once you create these rules, Percipio creates the team audiences and updates them each time it detects a change to the rule data (new users, updates to existing users, or changes to user attribute values).

Both audiences update automatically if defined by user attribute values.

What's an audience owner?

An audience owner is a user with the role of Manager or Learning Admin assigned to one or more audiences. The Manager or Learning Admin can access analytics about how users in their audience engage with Percipio. Owners who are Learning Admins can also create, edit, and manage assignments for users in their audiences. When an owner is added to or removed from an audience, Percipio may send them an email notification.

Why can only users with the Manager or Learning Admin roles be audience owners?

By default, **Site Admins** already have access to the reports, dashboards, and assignments of all audiences.

Managers usually manage small teams and can view some reports and dashboards for their audiences, to view insights as to how their team members engage with Percipio.

Learning Admins usually manage larger, cross-functional teams and can view the same reports and dashboards as Managers, but they can also manage assignments for their audiences.

Content Curators and **Content Coordinators** only manage content-related tasks in Percipio Admin.

Learners do not have access to Percipio Admin.

What is the difference between the default roles of Manager and Learning Admin?

Managers can access some dashboards and reports for their audiences.

Learning Admins can access the same dashboards and reports for their audiences and have assignment privileges for their audiences.

Can I add an audience owner to the All Users audience?

Yes.

You might want to add a user with a manager or learning admin role as an owner for **All Users** and then customize the role to just include reporting options. Doing this gives you a reporting only admin role for all Percipio users in your organization.

How can I work with audience owner email notifications?

Audience owner emails are sent when owners are added or removed. Read more in Audience Owner Emails.

Individual Audiences

An audience is a subset of your user population that you define. For each audience you can manage the allocation of licenses, create content assignments, and filter reports. You can manually set up an individual audience using the Audience Management page.

There is no limit to the size of or the number of audiences that you can create in Percipio.

> **Note:** To create multiple team audiences using automation, see Team Automation.

Create a New Audience

An audience is a subset of your user population that you define. For each audience you can manage the allocation of licenses, create content assignments, and filter reports.

Audiences are created in Percipio.

Before you create your audiences, review About Attributes and Audiences.

1. From the Admin menu, select **USERS > Audience Management**.
2. Select **Create Audience**. The Create Audience page displays.
3. Enter the **audience details.**
    a. Enter an **audience name**.
    b. Optionally, select the **audience owners**.

    > Note: Audience owners are not available in Percipio Compliance.

    What's an audience owner?

    An audience owner is a user with the role of Manager or Learning Admin assigned to one or more audiences. The Manager or Learning Admin can access analytics about how users in their audience engage with Percipio. Owners who are Learning Admins can also create, edit, and manage assignments for users in their audiences. When an owner is added to or removed from an audience, Percipio may send them an email notification.

Why can only users with the Manager or Learning Admin roles be audience owners?

By default, **Site Admins** already have access to the reports, dashboards, and assignments of all audiences.

Managers usually manage small teams. They can view some reports and dashboards for their audiences.

Learning Admins usually manage large teams. They can view the same reports and dashboards as Managers, and they can also manage assignments for their audiences.

Content Curators and **Content Coordinators** only manage content-related tasks in Percipio Admin.

4. Define your audience by specifying user attributes, adding individual users individually or in bulk, or both:

   Specify user attributes.

   a. Select **Add user attributes**.

   b. Select the user attributes and values for the audience.

      You have the option to select either **Equals** or **Does not equal** when choosing to include or exclude users. Sometimes it may be easier to exclude one or two values, than to include 35.

c. Optionally, select **Add user attribute rule** if you need to further refine your audience with additional attributes. If you specify more than one attribute, the user must meet all conditions to be included in the audience.

d. Repeat for additional user attributes and values.

e. When you are done adding all attributes, select **Done**.

The following rules apply when composing an audience based on user attributes:

- If you have only one rule where the condition is **Equals**, at least one of the user values has to match one of the rule values for the user to be included in the audience. Said another way, if the user does not have any values that match the Equals value, they are not included in the audience.
- If you have only one rule where the condition is **Does not equal**, the user must have any values other than the values defined in the rule to be included in the audience. Said another way, if the user has at least one value that matches the Does not equal value, they are not included in the audience.
- If you have more than one rule defined, the user must meet the condition of both individual rules to be included in the audience.

Add individual users.

a. Select **Add individual users**.

b. Enter a user name, user email, first name, or last name in the search field. All active users containing the search term (s) display. You cannot add inactive users to new audi- ences.

c. Locate the active user in the list.

d. Select ⊕.

e. Repeat for additional users.

f. Select **Add to audience**.

Bulk add individual users.

Before selecting to Bulk add individual users, you must create a single column CSV file with the users' data. This file must be less than 10,000 users and no bigger 500 KB.

a. Enter one of the following in the header row of the CSV file exactly as shown:

- email
- loginName
- externalUserId

b. Populate the remaining 9,999 rows with the unique user identifier matching what you specified in the header row. For example, if you specified email in the header row, enter each user's email address, one email address in each row for each user you want to add to the audience.

c. Save the CSV file. Ensure it is under 500 KB.

To bulk add users with your CSV file:

a. Select **Bulk add individual users**.

b. Select **Select a file**. Choose your newly created CSV file.

c. Select **Get users**. This step pre-validates your CSV file to ensure you are only adding users who have an active account in Percipio. Percipio identifies if a user does not have a Percipio account or is not active. Update your CSV file and try again.

d. When Percipio detects no errors, select **Add users(s)**. The users get added to the audience individually.

5. **Optionally, select the custom channels you want to associate with this audience.**

Associating a custom channel to an audience entitles the users within the audience to the content. If you remove a user from the audience, she loses access to the channel's content (if she does not have access to the specific content from any other audience associations). Adding users to the audience automatically entitles them to the content.

a. In the **Content association** section, select **Associate custom channels**.

b. Either browse the list or enter a search term to locate the custom channel you want to associate to your audience.

c. Select + for each custom channel you wish to associate to your audience.

d. Select **Associate to audience**.

Note about Assignments: If a user is removed from an associated audience and content within the custom channel is included in one or more of theiir assignments, the assignment remains on the Assignments page only if it is in an **In Progress** or **Completed** status, or if it contains content entitled to them via another audience association. Any content within the assignment that they are no longer entitled to displays as unavailable, and the assignment cannot be completed.

Important information about associating custom channels with an audience

- Associating a custom channel with an audience entitles the users within that audience to the channel's content.
- Adding users to the associated audience at any time entitles them to the channel's content.
- If users do not have access to the content within the custom channel via any other audience association, and you remove users from the custom channel audience, the users immediately lose entitlement and can no longer view the content.

6. Select **Create Audience**.

Edit an Audience

You can edit an audience's name, owners, and users. Prior to modifying users, see Important information about audience modification and assignments below.

To edit an audience

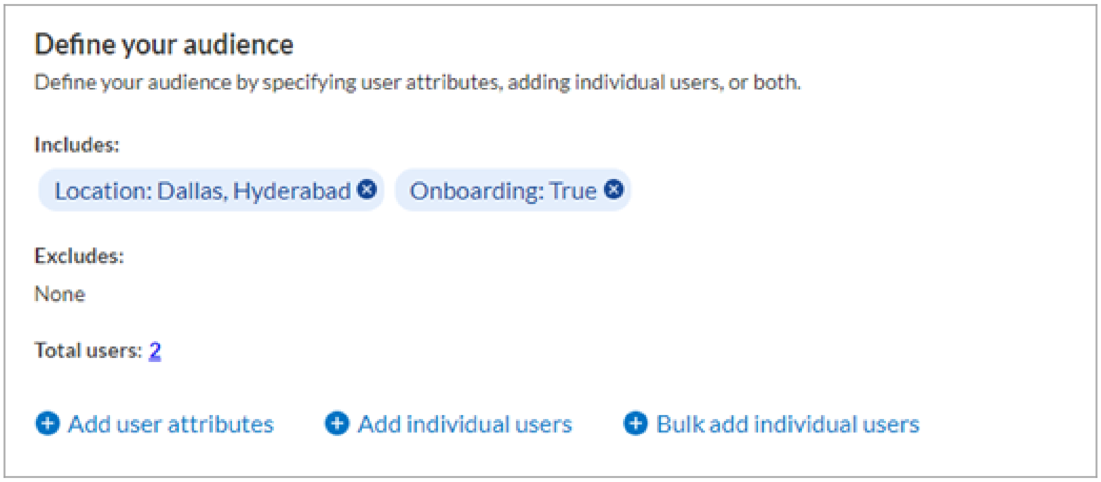
1. From the Admin menu, select **USERS > Audience Management**.
2. Locate the audience you wish to edit .
3. In the **ACTIONS** column,select ⋮ > **Edit**. The Edit Audience page displays.
4. Modify the **audience name**.

   CAUTION: If you change the name of an audience, and that audience has assignments made to it, all users that have not started the assignment will get an assignment email notification with a revised due date.

5. Optionally, select the **audience owners**.

   Audience owners must have a user role of Learning Admin or Manager. Not all audiences need owners. Audience owners may receive an email notification when they are added or removed.

6. Modify your audience definition. To assist you in your modifications, you see the current user attributes and users included and excluded from the audience. You also see the total number of users in the audience. You can add or remove either user attributes or individual users. Percipio recalculates the total number of users in your audience based on your new selections.



- ### To add user attributes

  Any user attributes you add to your existing selection act as an AND. Users need to meet all attribute conditions to be included in the audience. User attributes do not apply to individual users added to the audience.

  a. Select **Add user attributes**.

  b. Select the user attributes and values for the audience.

     You have the option to select either **Equals** or **Does not equal** when choosing to include or exclude users. Sometimes it may be easier to exclude one or two values, than to include 35.

  c. Optionally, select **Add user attribute rule** if you need to further refine your audience with additional attributes. If you specify more than one attribute, the user must meet all conditions to be included in the audience.

  d. Repeat for additional user attributes and values.

e. When you are done adding all attributes, select **Done**.

The following rules apply when composing an audience based on user attributes:

- If you have only one rule where the condition is **Equals**, at least one of the user values has to match one of the rule values for the user to be included in the audience. Said another way, if the user does not have any values that match the Equals value, they are not included in the audience.
- If you have only one rule where the condition is **Does not equal**, the user must have any values other than the values defined in the rule to be included in the audience. Said another way, if the user has at least one value that matches the Does not equal value, they are not included in the audience.
- If you have more than one rule defined, the user must meet the condition of both individual rules to be included in the audience.

- **To add individual users.**

a. Select **Add individual users**.

b. Enter a user name, user email, first name, or last name in the search field. All active users containing the search term(s) display. You cannot add inactive users to new audiences.

c. Locate the user in the list.

d. Select .

e. Repeat for additional users.

f. Select **Add to audience**.

- **To remove attributes or users**

a. Select next to the users and/or user attribute rules you wish to remove from the audience definition. If there are more users than what displays:

i. Select **Add individual users**.

ii. Select the **Selected users** tab.

iii. Select the checkmark to unselect all users that should no longer be in the audience. The user is immediately removed from the list.

iv. Select **Add to audience** to save your changes.

7. Select **Update Audience**.

Important information about audience modification and assignments

If you change the name of an audience, and that audience has assignments made to it, all users that have not started the assignment will get an assignment email notification with a revised due date.

Scheduled assignments have a Start Date in the future. When you **add a user** to an audience with a Scheduled assignment, the assignment displays on the user's Assignment page on the Start Date.

In Progress assignments have a Start Date in the past. When you **add a user** to an audience after the Start Date, the user receives an email notification and the assignment displays on their Assignment page.

The time to complete the assignment depends on how you configured the assignment. If you configured the assignment with a fixed date, the user sees the fixed date, which could be past due. If you configured the assignment with number of days, the user has the same number of days as all other users to complete the assignment.

> **Example**:
> An assignment has the **Number of days to complete** set to 30 and a **Start Date** of September 1.
> Jane Doe was part of the original audience, so the assignment started for her on September 1st. Jane's due date is September 30th.
> John Doe was added to the audience on September 4th, four days after the assignment's Start Date. John's due date is four days later, on November 4th.

Add an Audience Owner to an Existing Audience

You can add an audience owner to your audience at any time.

What's an audience owner?

An audience owner is a user with the role of Manager or Learning Admin assigned to one or more audiences. The Manager or Learning Admin can access analytics about how users in their audience engage with Percipio. Owners who are Learning Admins can also create, edit, and manage assignments for users in their audiences. When an owner is added to or removed from an audience, Percipio may send them an email notification.

1. From the Admin menu, click **USERS > Audience Management**.
2. Locate the audience to which you want to add an owner.

3. In the **ACTIONS** column, click ⋮ > ✏. The Edit Audience page displays.
4. In the **Audience owners** field, enter the name of the user you want to assign as the audience's owner.

   > **Note:** You can enter more than one user to be an audience's owner, but the user must have a user role of Learning Admin or Manager.

5. Click **Update Audience** to save your changes. Audience owners may receive an email notification when they are added or removed.

Add a User to an Existing Audience

You can add a user to an existing audience. Prior to modifying users, see Important information about audience modification and assignments below.

1. From the Admin menu, click **USERS > Audience Management**.
2. Locate the audience you want modify.
3. In the **ACTIONS** column, click ⋮ > ✏. The Edit Audience page displays.
4. In the Audience definition section, click **Add individual users**. The Add users page displays.
5. Enter a user name, user email, first name, or last name in the search field. All active users containing the search term(s) display. You cannot add inactive users to new audiences.
6. Locate the user in the list.
7. Click ⊕.
8. Repeat for additional users.
9. Click **Add to audience**. The Edit Audience page displays with the added user(s).
10. Click **Update Audience**.

Important information about audience modification and assignments

Scheduled assignments have a Start Date in the future. When you **add a user** to an audience with a Scheduled assignment, the assignment displays on the user's Assignment page on the Start Date.

Assignments can be set with either a fixed due date or a number of days to complete.

If you choose a fixed due date, everyone in the assigned audience must complete the assignment on that date no matter when they get added to the audience.

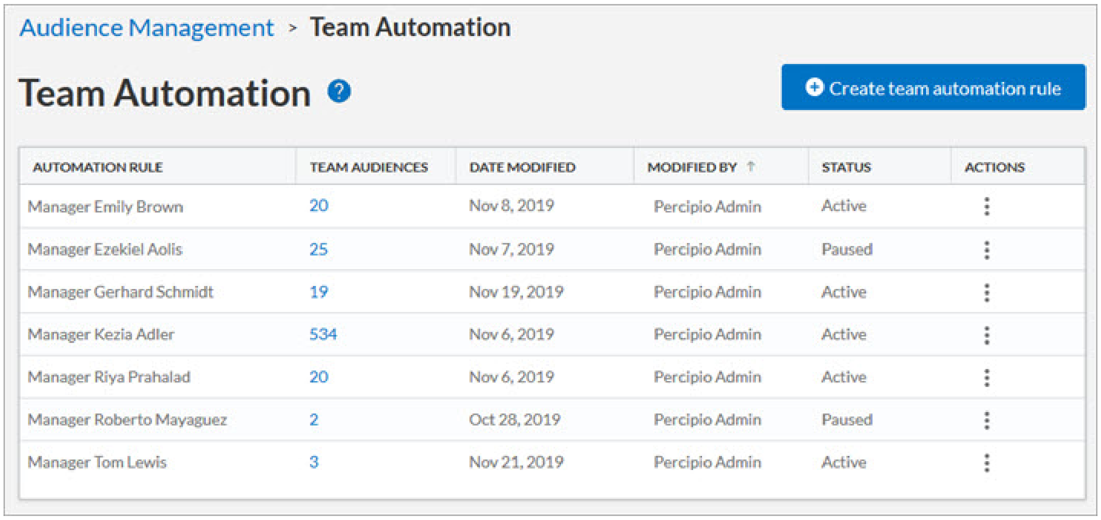
If you choose a number of days to complete, then whenever a user gets added to an assigned audience, they have that many days to complete it. The completion date could be different for different users depending on when they received the assignment.

> **Example**:
> An assignment has the **Number of days to complete** set to 30 and a **Start Date** of September 1.
> Jane Doe was part of the original audience, so the assignment started for her on September 1st. Jane's due date is September 30th.
> John Doe was added to the audience on September 4th, four days after the assignment's Start Date. John's due date is four days later, on October 4th.

Team Automation

Team automation automatically creates multiple audiences (called team audiences) using a set of rules based solely on user attribute values.

When Percipio detects a change within the rule data, it creates new team audiences for you during the daily job run. These run every day at 7:00 pm ET from the US data center and 4:15 am UTC from the EU data center. If a new attribute is added after that time (either manually or as the result of a scheduled data feed), then audiences with that attribute are not created until the following day's job run.



Team automation simplifies the process of creating multiple audiences and assigning audience owners in Percipio. Use team audiences to:

- automatically assign team owners (Learning Admins and Managers) to your learners.
    - When you select to define an audience using the Percipio User Attribute type, each audience is owned by the user defined in the Percipio user attribute. You can also add other users to be owners for all audiences created by the rule. For example, if you want all your managers to own the audience with their direct reports and also have an HR representative to see all of those audiences, define a team automation rule using the Percipio User Attribute type that has the manager name as values in it, and then add the HR representative to the rule definition.
    - If you use the Percipio list type to define the audience, you can specify at least one user to be the owner of all audiences created. This selection does not allow each audience to have a different owner

unless you assign the owner manually after the audience has been created.

- filter reports
- create assignments

> **Note:** To create a single audience that does not automatically update, see Individual Audiences.

Frequently asked questions about team automation

Why use team automation?

You can quickly create multiple audiences and keep them updated automatically. You can also automatically assign those audiences to one or more audience owners in Percipio. Audience owners (both Managers and Learning Admins) can access team analytics and, if the owner is a Learning Admin, they can create assignments for their audiences.

What is a team audience?

A team audience is one that is created using the team automation process in Percipio. It automatically generates based on rules; for procedures, see Create a Team Automation Rule.

How do team audiences work?

- When you select a Percipio User attribute, each value generates an audience, and that Percipio user is automatically set as the audience owner.

- When you select a List attribute, each value generates an audience. You can then assign one or more owners to all of these audiences at once.

Can I delete a team automation rule?

No, you cannot delete a rule once it's created. To stop a rule from running, and therefore stop team audience creation and updating, you can pause a rule. See Pause a Team Automation Rule for procedures.

When are the team audiences created?

Daily jobs run every day at 7:00 pm EST. If a new attribute is added after that time (either manually or as the result of a scheduled data feed), then audiences with that attribute are not created until the following day's job run.

My organization uses Percipio Compliance. Do team audiences automatically populate in Compliance Administrator the same way audiences do?

No. Team audiences are not designed for use with Percipio Compliance, as they do not automatically populate in Compliance Administrator. If you need an audience that is created via team automation for Percipio Compliance, you must manually recreate it in Percipio using the Create a New Audience procedure. For more information about how audiences work within Compliance, see About Compliance Audiences and Users.

Create a Team Automation Rule

1. From the Admin menu, click **USERS > Audience Management**.
2. Click **Team Automation**. The Team Automation page displays.
3. Click **Create team automation rule**. The Create Team Automation Rule page displays.
4. Enter an **Audience rule name**.
5. Select a user attribute. Only Percipio User and List attributes display in the drop-down list.
   - If you select a Percipio User attribute, each value (which is a Percipio user) generates a team audience **and** that Percipio user is automatically set as the audience owner. This sets up multiple audiences each with different audience owners. To add at least one user as owner for all audiences created by this rule, see additional audience owners.
   - If you select a List attribute, each value generates a team audience. This selection does not allow each audience to have a different owner unless you assign the owner manually after the audience has been created. To add at least one user as owner for all audiences created by this rule, see additional audience owners.

   Note: Once you select an attribute, the number of attribute values display. This is how many team audiences Percipio creates once you run this rule.

6. Optionally, you can change the **Team audience name prefix**. By default, this automatically populates as the same name as the selected user attribute.
7. Optionally, you can add **additional audience owners**. Enter a Percipio user name. Only users with a role of Manager or Learning Admin are

eligible to be an audience owner; for more information, see Audience Management.

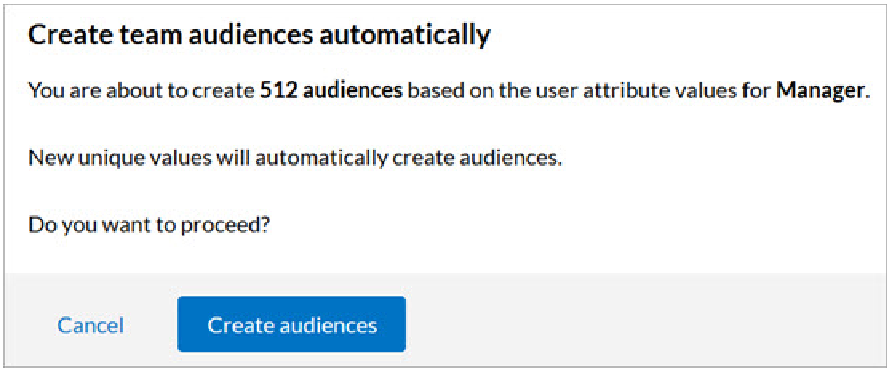
   a. When you select to define an audience using the Percipio User Attribute type, each audience is owned by the user defined in the Percipio user attribute. You can also add other users to be owners for all audiences created by the rule. For example, if you want all your managers to own the audience with their direct reports and also have an HR representative be able to see all of those audiences, define a team automation rule using the Percipio User Attribute type that has the manager name as values in it, and then add the HR representative to **additional audience owners**.

   b. If you use the Percipio list type to define the audience, you can specify at least one user to be the owner of all audiences created by selecting their name in **additional audience owners**.

8. By default, Percipio sends an email notification to the audience owners once the audience is created. If you do not want Percipio to notify the audience owners, change the **Send an email to audience owners when their audience is created** setting to Off.

   NOTE: If you do not see the option, **Send an email to audience owners when their audience is created** setting, the email notification has been disabled from Site Configuration.

9. Click **Create**. A confirmation message displays, informing you of the number of team audiences you are about to create.



10. Click **Create audiences**. The team audiences display on the Audience Management page.

Edit a Team Automation Rule

1. From the Admin menu, click **USERS > Audience Management**.
2. Click **Team Automation**. The Team Automation page displays.
3. Locate the rule you wish to edit.
4. Click the rule name. The Team Automation Rule page displays.
5. Modify the:
   - Audience rule name,
   - Team audience prefix, and
   - Additional audience owners.

   Note: You cannot modify the user attributes. If you wish to change the user attribute, you must create a new team automation rule.
6. Click **Update**. The rule runs immediately.

Pause a Team Automation Rule

When you pause a team automation rule, no updates are made to its audiences. To resume audience updates, see Resume a Paused Team Automation

Rule.

To pause a team automation rule

1. From the Admin menu, click **USERS > Audience Management**.
2. Click **Team Automation**. The Team Automation page displays.
3. Locate the rule you wish to pause.
4. Click ⋮ > **Pause automation**. A confirmation message displays.
5. Click **Pause automation**. The rule pauses immediately and no updates are made to its audiences.

Resume a Paused Team Automation Rule

1. From the Admin menu, click **USERS > Audience Management**.
2. Click **Team Automation**. The Team Automation page displays.
3. Locate the rule you wish to resume.
4. Click ⋮ > **Resume automation**. A confirmation message displays.
5. Click **Resume automation**. The rule resumes and runs immediately.

Associate a Custom Channel to an Audience

To control which learners can view your custom channels, associate the channels to one or more audiences. This entitles only those learners within the specified audience(s) to view the custom channels. You can associate custom channels and audiences through the **Create Audience**, **Edit Audience**, **Create Custom Channel**, and **Edit Custom Channel** pages in Percipio. You can also associate an audience to a custom channel within the Custom Channel workflow.

> **Note:** Skillsoft content within a custom channel remains viewable to users who have a license to the content, but they can only

access it via browsing the library, Percipio Search, or from an assignment containing the content. See Audience Associations for information about granting licenses to users.

To associate a new custom channel to an existing audience

This procedure is available only to Site Admins and Content Curators.

1. From the Admin menu, select **CONTENT** > **Custom Channels**. The Custom Channels page displays.
2. Click **Add Custom Channel**. The Create Channel page displays.
3. Enter a **Title** and **Description** for the channel, and select a background image.
4. Select your area and subject (for library placement) from the **Subject** drop-down list.
5. Click **Save and add content**.
6. Add content to the channel. For details about this step, see Add content to the channel.
7. At the bottom of the Create Channel page, in the Audience section, click **Select audiences**. The Select Audiences page displays.
8. Use the search to locate the audiences you want to associate to the custom channel and click ⊕ next to all audiences you wish to include.

   Note: If you do not select an audience, the custom channel displays to all learners via the **All users**

audience. If a learner is not entitled to content in the custom channel, an error message displays to him instead of the asset. To avoid this, select one or more audiences associated to the license pool in which the channel's content is included.

9. Click **Done**. The Create Channel page displays again.
10. Click **Publish**.

    Your channel publishes to Percipio and is available to the learners in your selected audiences.

To associate an existing custom channel to an existing audience

This procedure is available only to Site Admins and Content Curators. See the Important information about associating custom channels and audiences section above to view potential learner impacts.

1. From the Admin menu, select **CONTENT** > **Custom Channels**. The Custom Channels page displays.
2. Locate the channel you wish to associate to an audience.
3. Click ⋮ > **Edit**. The Edit Custom Channel page displays.
4. In the Audience section, click **Select audiences**. The Select Audiences page displays.

    Note: If you do not select an audience, the custom channel displays to all learners via the **All users** audience. If a learner is not entitled to content in the custom channel, an error message displays to him instead of the asset. To avoid this, select one or more audiences associated to the license pool in which the channel's content is included.

5. Use the search to locate the audiences you want to associate to the custom channel and click ⊕ next to all audiences you wish to include.
6. Click **Done**. The Create Channel page displays again.
7. Click **Publish**.

   Your channel publishes to Percipio and is available to the learners in your selected audiences.

To associate a new audience to an existing custom channel

This procedure is available only to Site Admins.

1. From the Admin menu, click **USERS > Audience Management**.
2. Click **Create Audience**. The Create Audience page displays.
3. Enter the **audience details.**
4. Define your audience by specifying user attributes, adding individual users, or both.
5. In the **Content association** section, click **Associate custom channels**.
6. Either browse the list or enter a search term to locate the custom channel you want to associate to your audience.
7. Click ⊕ for each custom channel you wish to associate to your audience.

8. Click **Associate to audience**. The Create Audience page displays again.
9. Click **Create Audience**.The audience displays in the audience list and is associated to the custom channel(s).

To associate an existing audience to an existing custom channel

This procedure is available only to Site Admins.

1. From the Admin menu, click **USERS > Audience Management**.
2. Locate the audience you wish to associate with the custom channel.
3. Click ⋮ > ✎ **Edit**. The Edit Audience page displays.
4. In the **Content association** section, click **Associate custom channels**.
5. Either browse the list or enter a search term to locate the custom channel.
6. Click ⊕ for each custom channel you wish to associate to your audience.
7. Click **Associate to audience**.

> **Note about Assignments:** If a learner is removed from an associated audience and content within the custom channel is included in one or more of their assignments, the assignment remains on the Assignments page only if it is in an **In Progress** or **Completed** status, or if it contains content entitled to them via another audience association. Any

content within the assignment that they are no longer entitled to displays as unavailable, and the assignment cannot be completed.

8. Click **Update Audience**.
9. Repeat steps 2 - 7 for additional audiences you want to associate to the custom channel

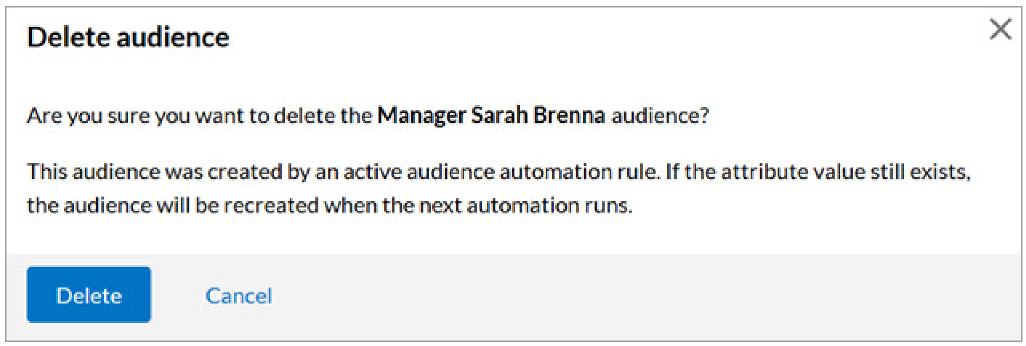
Important information about associating custom channels and audiences

- By default, custom channels are associated to the **All Users** audience.
- When you associate a custom channel to one or more audiences, the **All Users** audience association is removed and only the specified audience (s) can access the channel.
- If you change the audience association from **All Users** to a specific audience, learners in the **All Users** audience lose access to the channel's content because only those learners in the specified audience can access the content.
- Adding learners to an associated audience automatically entitles them to view the custom channel and grants them license to all content within it.
- If you remove a learner from an associated audience, they lose access to the channel's content (if they do not have access to the specific content from any other audience associations).

Delete an Audience

You can only delete an audience if there are no **In Progress** assignments associated with it.

1. From the Admin menu, click **USERS > Audience Management**.
2. Locate the audience you wish to delete.
3. Click ⋮ > . A confirmation message displays.
    - If the audience was created manually, click **Delete**. The audience is removed from Percipio.
    - If the audience was created using team automation, the following message displays:



        - If you want the team audience recreated, click **Delete**. The audience is removed from Percipio and will be recreated when the rule is next run.
        - If you do not want the team audience recreated, click **Delete**, then "Pause a Team Automation Rule" on page 163.

Assignments

Site Admins can create a new assignment for any audiences or learner in Percipio. **Learning Admins** (and Managers with Assignment privileges) can create assignments for their audiences or for the individual learners within their audiences. To create an assignment, you must:

- define its context (business objective and days to complete it and whether items should be completed in order)
- select audiences and/or learners for the assignment
- choose what content the learner must finish by the completion date
- decide if learners are required to restart any courses they may have already completed

Get started with assignments

This page contains information to get you started with assignments:

- Manage assignments
- Assignment status
- Important information about assignments

Manage assignments

To access assignments, From the Admin menu, select **LEARNING > Assignments**. The Assignments page displays.

The Assignments page displays a list of assignments created. From this page, you can:

- Download the Assignment List: This generates a CSV file about your assignments.

- Set default reminders: Configure how frequently Percipio sends email reminders to learners who receive assignments reminding them to complete the assignment.
- Create a new assignment
- Filter the assignment list by status. Each assignment status offers different actions. Possible actions include:
  - Copy: makes a copy of the assignment excluding any retired content and places it in a draft status for editing.
  - Edit: allows you to make changes to the assignment. If the assignment has a status of In Progress, you cannot change the content.
  - Delete: allows you to remove the assignment from the list. You can only delete draft assignments.
  - View a summary: allows you to view details and statistics about the assignment. From this page, you can also cancel the assignment for an individual user or audience.
  - Archive: allows you to close an assignment that has a specified end date.
  - Cancel for all: allows you to cancel the assignment for all users and audiences. You can also cancel for individual users from the Summary page.
  - Manage schedule: Override any default settings for how frequently Percipio sends email reminders to learners who receive assignments reminding them to complete the assignment.
  - Email: allows you to send a reminder email notification to all targeted learners and audiences.

- Sort on each column. The columns are:
  - **Name**: The title of the assignment
  - **Created by**: The first and last name of the person who created the assignment.
  - **Duration**: The specified end date or the number of days to complete as defined within the assignment.
  - **Users**: The total number of active users who received the assignment. This list does not show inactive users.If you select the hyperlinked number, you see a list of each active individual who sees the assignment (whether they were added as an individual or through an audience), the date it is due for them, and their status.
  - **Status**: The status of the assignment.

Assignment status

Each assignment has a status.

- **Draft:** The assignment is not launched.
  - You can edit, copy, and delete a Draft assignment.
- **Scheduled**: The assignment has been scheduled to launch at a later date.
  - You can edit, copy, view a summary, and cancel.
  - To delete a Scheduled assignment, edit it and save the assignment. This puts it into a draft state, which you can then delete.
- **In Progress**: The assignment is launched and it is available to learners.
  - You can copy and archive an In Progress assignment.
  - You cannot edit the contents of an In Progress assignment.

- You can edit the assignment name, business objectives, description, due dates, and audiences.
- You cannot delete an In Progress assignment.
- You can cancel an In Progress assignment.
- You can manage the schedule and adjust email reminder notifications.

- **Archived**: The assignment has been archived in Percipio because it is no longer relevant.
  - You can copy an assignment that has a status of Archived.
  - You cannot edit or delete an Archived assignment.
  - Archived assignments still appear on Assignment reports and dashboards.
  - Learners cannot see archived assignments in their Assignment list.
- **Canceled:** The assignment has been canceled because it was created in error.
  - Canceled assignments do not appear in Assignment reports or dashboards.
  - Learners can see canceled assignments on their Assignments page, but they cannot open them.
  - Learners can remove canceled assignments from their Assignment list.
  - You can copy and view canceled assignments.
  - You cannot edit canceled assignments.

Important information about assignments

- Start, end, and completion dates are in GMT.
- If a learner is assigned content they are not entitled to, they can see the content in their assignment list, but cannot access it. For more information about entitlements, see Licenses.
- You cannot add channels or leadership practice guides to an assignment.
- You can add a maximum of a 100 total content items to an assignment.
- If you select the option, **Require learners to complete all courses from the beginning**, learners who previously completed a course, must take it again to complete the assignment.
- Once an assignment is launched, you cannot add or remove content from the assignment.
- Assignments with the same due date are listed by when the assignment is launched, in ascending order, on a learner's assignments page and on the home page.
- If one or more assets within an assignment is retired, and the assignment has active content in it, the retired content no longer counts towards the assignment completion criteria. If the order is forced, the learner is automatically able to access the next item in the list after the retired content.
- If all content within an assignment is retired, the admin must cancel or archive the assignment, otherwise learners who started the assignment see it listed as In Progress and can't complete it.
- If you remove a learner from an audience that has an assignment and the learner has **not completed** the assignment, the assignment no longer displays for the learner in their assignment list and they no longer show in assignment reports.

If you remove a learner from an audience that has an assignment and the learner has **completed** the assignment, the assignment remains in their assignment list and their completion remains in assignment reports.

- To replace retired content:
    1. Copy the current assignment.
    2. Edit the copy to include a replacement asset and assign the copy to learners.
    3. Archive the original assignment.

Create a New Assignment

You can create assignments for entire audiences and/or individual learners. Audiences are comprised of learners who have a defined set of user attributes. When you assign user attribute values to learners, they are automatically added to one or more audiences if the assigned user values match the audience definition.

Site Admins can create assignments for any audience or learner in Percipio. **Learning Admins** (and Managers with Assignment privileges) can create assignments for their audiences and the learners within their audiences.

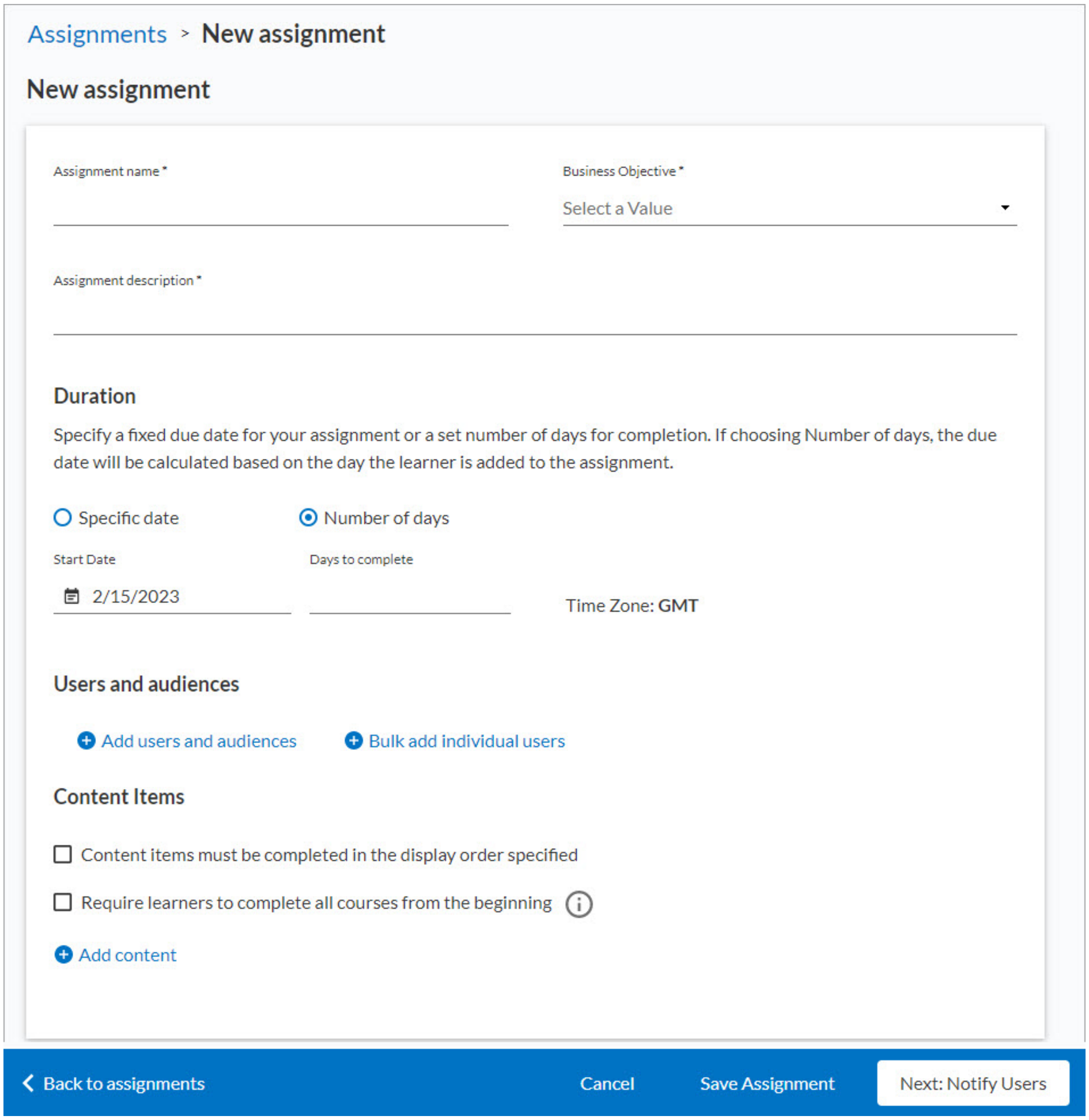
Example

Example:
1. Your organization has an audience called **New Hires**, which contains a user attribute called **new_hire**. This user attribute has two values: **true** and **false**.
2. The **New Hires** audience includes those users with the **new_hire** user attribute set to **true**.
3. You want to create an assignment specifically for the **New Hires** audience (**new_hire** = **true**).
4. When a new user is added to your site, with a **new_**

hire user attribute set to **true**, they automatically becomes a member of the **New Hires** audience, and receives the assignment created for that audience, with the relative due date set in the assignment.

To create a new assignment

1. From the Admin menu, select **LEARNING > Assignments**. The Assignments page displays.
2. Select **New Assignment**. The **New assignment** page displays.



Note: To create an assignment in a different language, select that language from the language drop down next to My Profile. The admin interface will change to that language. You can then specify all relevant assignment information in that language including selecting localized content.

3. Enter the **Assignment name**.
4. Using the drop-down list, associate a **Business Objective** with the assignment.

   This association is used to build alignment metrics for your organization.

These metrics are available from the Assignments dashboard.

Available Business Objectives

- **Cost control:** Formal and informal efforts made by managers to monitor, evaluate, and reduce expenditures.
- **Customer satisfaction:** Efforts focused on increasing the number of customers whose reported experience with a firm, its products, or its services exceeds specified satisfaction goals.
- **Employee engagement:** Quality and quantity of discretionary effort employees are willing to apply to the organization and its goals.
- **Revenue Growth:** Efforts designed to increase the revenue an organization derives from its products and services to customers.
- **Innovation:** The creation and capture of new value in the marketplace, including new products and services
- **Operational effectiveness:** Practices that enable the organization to better utilize its operations resources and better implement its processes and procedures
- **Quality:** Improvement in the quality of products and services produced and delivered by the organization
- **Workforce productivity:** Amount and impact of work delivered by an employee or group of employees in a specific period of time.

5. Enter an **Assignment description**. This displays to your learners in the assignment details.
6. Select a **Duration**.

Specific date

If you add a user or audience to this assignment while it is in an **In Progress** status, those learners must complete the assignment by the specified End date. If you want all users to have the same number of days to complete an assignment, regardless of when you add them to it, use the **Number of days** option.

Start, end, and completion dates are in GMT.

a. Enter a **Start date**.

b. Enter an **End date**.

> **Note:** If a learner is added to an audience with an assignment that has a specific end date, and that end date has passed, the learner will receive the assignment as overdue in their assignment list. To avoid this scenario, you can change the end date or archive the assignment.

Number of days

If you add a user to an assignment (or if you add a user to an audience with the assignment), they receive the assignment with a relative due date. See the note in step b.

Start, end, and completion dates are in GMT.

a. Enter a **Start date**.

b. Enter the number of **Days to complete**.

> **Note: Days to complete** is calculated for each user based on the day the user is added to the assignment or an assigned audience. For example, if you create an assignment October 1 and set the Days to complete to 15, the due date for the users and audiences is October 15. If a new user is added to the audience on October 5 (when the assignment has a status of **In Progress**), her due date is October 20.

7. **Add users and audiences to the assignment.**

   You can add users in one of two ways, by selecting them or via a bulk add using a CSV file.

   To add users or audiences:

   a. Select **Add users and audiences**.
   b. In the search field, enter the name of an audience or individual learner.
   c. Select .
   d. Locate the audience or learner you want to assign the content to and select . If you select audiences instead of individual users, then users automatically get added to and removed from an assignment based on the values in the user attribute set in the audience.

e. Repeat these steps until you've added all learners and/or audiences.

f. Select **Add to this Assignment**. The Edit Assignment page displays.

> **Note:** If you remove a learner from an audience that has an assignment and the learner has **not completed** the assignment, the assignment no longer displays for the learner in their assignment list and they no longer show in assignment reports. If you remove a learner from an audience that has an assignment and the learner has **completed** the assignment, the assignment remains in their assignment list and their completion remains in assignment reports.

To bulk add individual users using a CSV file:

a. Select **Bulk add individual users**.

b. Select to **Download template** CSV file. The template contains three columns:

   - **email**: the email of the user as specified in the Percipio user record.
   - **loginName**: the Login Name of the user as specified in the Percipio user record.
   - **externalUserId**: The User ID used to identify a user inside Percipio.

c. Include user data in one of the three columns and remove the other two unused columns.

d. Save and select the one-column CSV file for import.

e. Select **Add user(s)**.

8. **Add content to the assignment.**

Before you add content, select how you want the content to behave within the assignment. You have two options:

- **Content items must be completed in the display order specified:** To enforce a specific order of content, select this option. When you select this option, learners cannot access content out of the specified order. They must complete each piece of content before the next, in accordance with the set completion criteria. See Completion Settings for more information about setting course completion criteria. See Complete your Content for each asset type's specific completion criteria requirements.
- **Require learners to complete all courses from the beginning:** When selected, learners must restart from the beginning any previously completed Skillsoft courses that are part of the assignment. Previous course completions will not count towards the assignment completion when this option is selected.

  This setting does not apply to other content types within the assignment. If learners have any progress or completions for other content types such as books or videos, the learner's previous progress or completion does count toward the assignment completion.

If unselected, learners previous course completions do count toward assignment completion.

You cannot change this setting after you launch the assignment.

> **Note:** When choosing content to add to an assignment, you can choose content from all license pools installed on your site. If your users do not have access to a content item because their audience is not associated with the appropriate license pool, they see the item in the assignment and cannot launch it. They also cannot complete the assignment.

a. Select **Add Content**.

b. In the search field, enter keywords or titles of the content you want to include, then select the magnifying glass or press **Enter**.

c. Select next to each piece of content you want to add to the assignment.

d. Repeat these steps until you've added all the content. You can add a maximum of 100 total items.

> **Note:** You can add instructor-led training (live course) to an assignment. The learner must

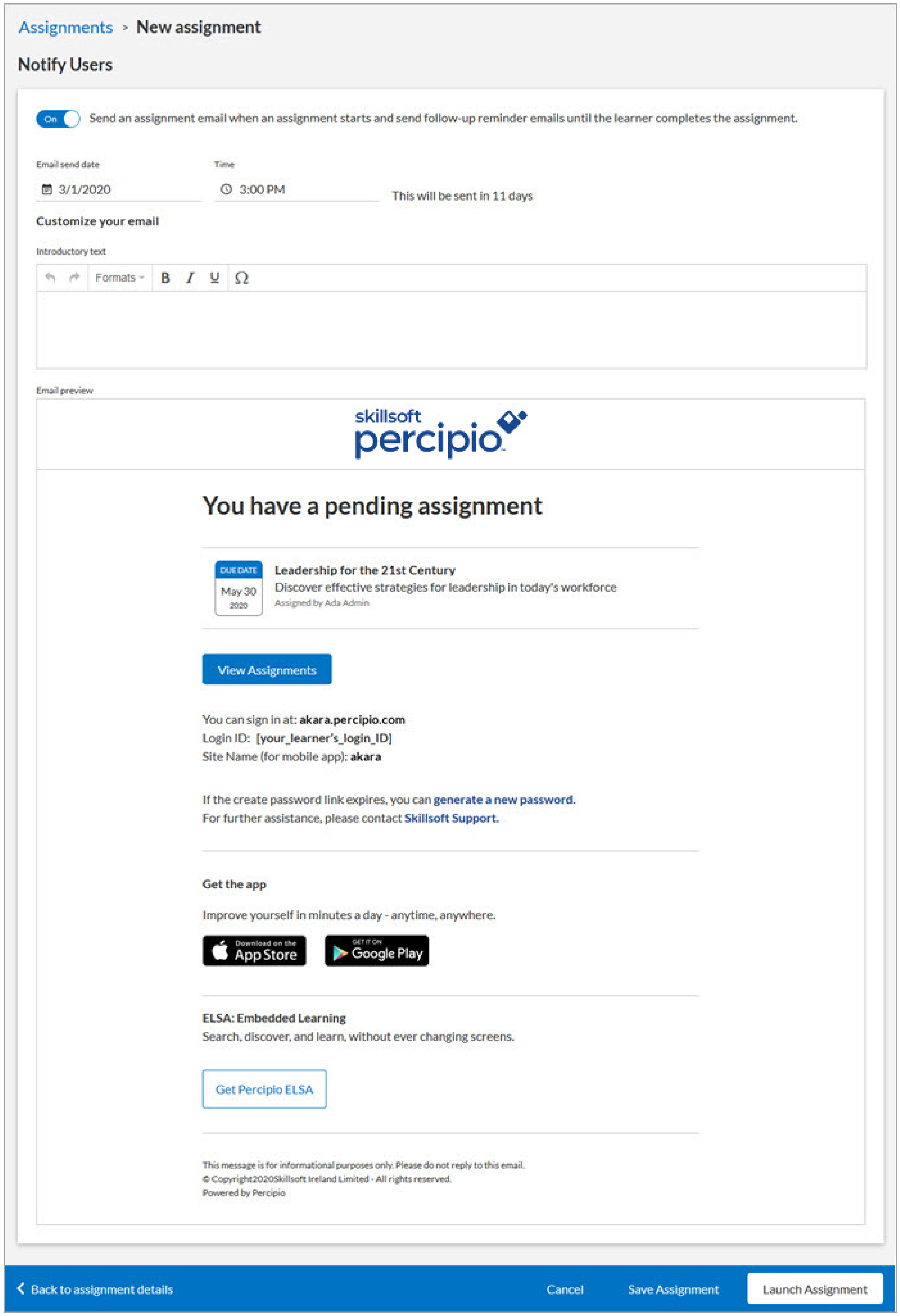
register for the class that best meets their schedule, attend the class, and achieve a passing score to achieve completion.

e. Select **Add Content**. The Edit Assignment page displays.

f. Drag and drop the content into the order you want it presented to the learner. Alternatively, use the arrow buttons to move content up or down the list.

   If you selected the **Content items must be completed in the display order specified** option, learners must complete each item in the order presented here.

9. Select **Next: Notify users**. The Notify Users page displays. If you want to send an initial assignment email to learners letting them know they now have an assignment, set the **Send an assignment email** toggle to On. You can then add customized text to the Assignment coming due email template. This initial notification sends independent of the default email reminder schedule. If you want to modify the default email reminder schedule for this individual assignment, see Manage schedule.



Assignments > New assignment
Notify Users
On
Send an assignment email when an assignment starts and send follow-up reminder emails until the learner completes the assignment.
Email send date
3/1/2020
Time
3:00 PM
This will be sent in 11 days
Customize your email
Introductory text
Formats
B
I
U
Ω
Email preview
skillsoft percipio
You have a pending assignment
DUE DATE
May 30
2020
Leadership for the 21st Century
Discover effective strategies for leadership in today's workforce
Assigned by Ada Admin
View Assignments
You can sign in at: akara.percipio.com
Login ID: [your_learner's_login_ID]
Site Name (for mobile app): akara
If the create password link expires, you can generate a new password.
For further assistance, please contact Skillsoft Support.
Get the app
Improve yourself in minutes a day - anytime, anywhere.
Download on the App Store
GET IT ON Google Play
ELSA: Embedded Learning
Search, discover, and learn, without ever changing screens.
Get Percipio ELSA
This message is for informational purposes only. Please do not reply to this email.
© Copyright2020Skillsoft Ireland Limited - All rights reserved.
Powered by Percipio
Back to assignment details
Cancel
Save Assignment
Launch Assignment

You can leave the toggle set to Off if you don't want to send the initial notification email. You can have the initial notification off and still send reminder emails. Percipio sends the reminder emails automatically to learners until they complete the assignment. Percipio sends these reminder emails based on the assignment duration and the frequency set for each reminder segment: Initial, Due date approaching, and Past due.

> **Note:** If you add customized text in the initial email notification when you create the assignment, those customizations are also used in the one-off email reminders and both the reminder emails that go prior to the due date as part of the reminder schedule.

10. Select one of the following options:
    - **Save assignment:** Saves the assignment, places it into a **Draft** status, and returns you to the Assignments page. You can modify this assignment later.
    - **Launch assignment:** Places the assignment into one of the following statuses:
        - If the **Start date** is today, the assignment is placed in an **In Progress** status and the assignment is immediately available to your learners. The email with the assignment details sends at the date and time you specified in step 9. Modifications to the assignment content cannot be made, but you can add a user to the assignment.
        - If the **Start date** is in the future, the assignment is placed in a **Scheduled** status and the email, if enabled, sends at the date and time you specified in step 9. You can make modifications to all aspects of the assignment until the **Start date**.

11. If you want to use scheduled email reminders for this launched assignment, return to the Assignment list page, then:
    a. Locate the assignment in the list, and from the More Actions menu, select **Manage schedule**.
    b. Make any adjustments to the scheduled reminders. If they are off, you can turn them on. When they are on, you can modify the frequency. For more information, see Schedule default email reminders.

Assignments with the same due date are listed by when the assignment is launched, in ascending order, on a learner's assignments page and on the home page.

Edit an Assignment

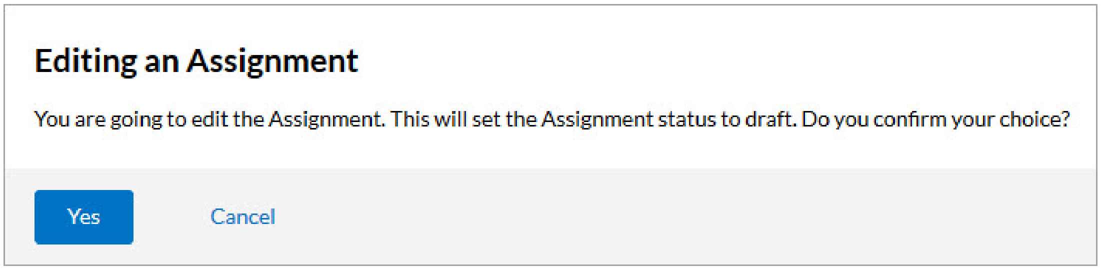
Site Admins can edit assignment meta data for all assignments including those they didn't create.

Learning Admins(and Managers with Assignment privileges) can only edit an assignment's meta data for assignments they created.

> **Note:** You cannot edit an **In Progress** assignment's content items or change the option to require learners to restart a course from the beginning.

1. From the Admin menu, select **LEARNING > Assignments**. The Assignments page displays.
2. Use the search to locate the assignment you wish to edit.
3. Select ⋮ > **Edit**.

   If you are editing a Scheduled assignment, click **Yes** when the following message displays:



4. You can modify the following:

   - assignment name
   - business objective
   - assignment description
   - start date (for Draft or Scheduled assignments only)
   - end date or number of days
   - learners and audiences
   - customized text for email reminders

   Note: Start, end, and completion dates are in GMT.

5. **Add users and audiences to the assignment.**

   You can add users in one of two ways, by selecting them individually or via a bulk import using a CSV file.

   To add users or audiences individually by selecting them:

   a. Select **Add users and audiences**.

   b. In the search field, enter the name of an audience or individual learner.

   c. Select the magnifying glass or press **Enter**.

d. From the list of search results, locate the audience or learner you want to include in the assignment and select .

e. Repeat these steps until you've added all learners and/or audiences.

f. Select **Add to this Assignment**. The Edit Assignment page displays.

To bulk add individual users with a CSV file:

a. Select **Bulk add individual users**.

b. Select to **Download template** CSV file. The template contains three columns:

   - **email**: the email of the user as specified in the Percipio user record.
   - **loginName**: the Login Name of the user as specified in the Percipio user record.
   - **externalUserId**: The User ID used to identify a user inside Percipio.

c. Include user data in one of the three columns and remove the other two unused columns.

d. Save and select the one-column CSV file for import.

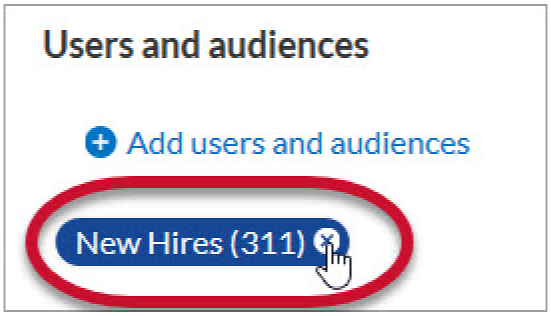
e. Select **Add user(s)**.

6. **Remove users and audiences from the assignment.**

> **Note:** Prior to removing audiences and learners, save your assignment. Removing audiences and

learners is an immediate action, and the only way to undo it is to click **Cancel**, which will not save any of your modifications.

If you need to remove users or audiences from an assignment, cancel it for them. If you select the X next to a user or audience, it does not remove them from the assignment.



If you remove a learner from an audience associated with an assignment, the user is removed from the assignment and they receive a cancellation email notification.

Note: If you remove a learner from an audience that has an assignment and the learner has **not completed** the assignment, the assignment no longer displays for the learner in their assignment list and they no longer show in assignment reports. If you remove a learner from an audience that has an assignment and the learner has **completed** the assignment, the assignment remains in their assignment list and their completion remains in assignment reports.

7. **Add content to a Draft or Scheduled assignment.**

   a. To enforce a specific order of content, select **Content items must be completed in the display order specified**.

      > **Note:** When you select this option, learners cannot access content out of the specified order. They must complete each piece of content before the next, in accordance with the set completion criteria. See Site Configuration for more information about setting course completion criteria. See Complete your Content for each asset type's specific completion criteria requirements.

   b. Click **Add Content**.

   c. In the search field, enter keywords or titles of the content you want to include, then click .

   d. Click next to each piece of content you want to add to the assignment.

   e. Repeat these steps until you've added all the content. You can add a maximum of 100 total items.

   f. Click **Done**. The Edit Assignment page displays again.

   g. If you selected the **Content items must be completed in the display order specified**, drag and drop the items into the order you wish the learners to complete the content.

Alternatively, use the arrow buttons to move content up or down the list.

The order in which the content is arranged here is the order in which it is presented to the learner.

8. To remove content from a Draft or Scheduled assignment, in the Content section, locate the content you wish to remove and click ⊗. The content is removed immediately.

9. **Customize email reminders that go prior to the due date.**

   a. Select **Next: Notify users**. The Notify users page displays.

   b. Because you are editing an existing assignment, this initial notification no longer sends. However, if you want to customize an one-off email or your scheduled email reminders, you can do it here. Set the **Send an assignment email** toggle to **On**, if not already.

   c. Customize your email. Any customizations you make here apply to all email reminders that go prior to the due date using the Assignment coming due template. Learners receive reminders until they complete the assignment.

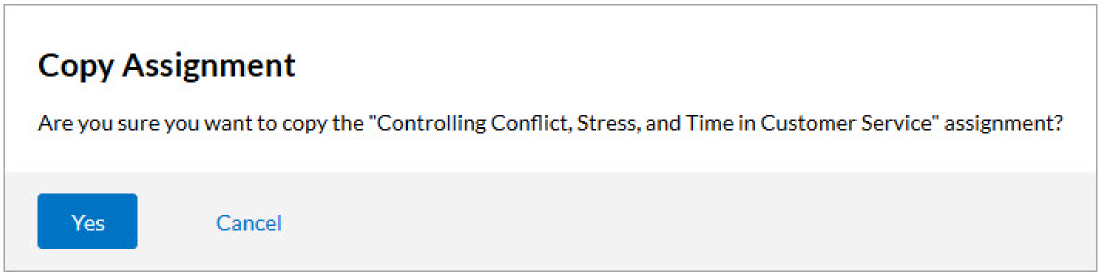
10. Select **Save assignment** to save any changes made. You can then navigate back to the Assignment page.

Copy an Assignment

Site Admins can copy any assignment in Percipio. **Learning Admins** can copy assignments they created for their audiences and the learners within their audiences.

1. From the Admin menu, select **LEARNING > Assignments**. The Assignments page displays.
2. Use the search to locate the assignment you wish to edit and click ⋮ > **Copy**.

   The following message displays:

3. Click **Yes**.
4. In the assignment list, locate the assignment copy you just created.

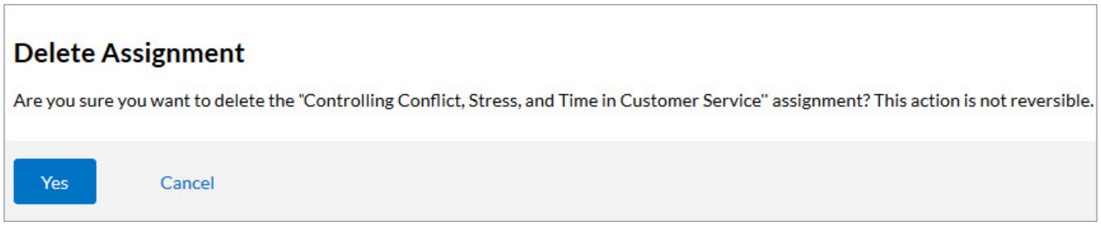
   For the example above, the name of the assignment would be **Controlling Conflict, Stress, and Time in Customer Service-copy**.
5. Click ⋮ > **Edit**.
6. Edit the assignment.

Delete a Draft Assignment

Deleting an assignment is irreversible, and the assignment is non-recoverable. You can only delete a Draft assignment.

Site Admins can delete Draft assignments for any audience or learner in Percipio. **Learning Admins** can delete only Draft assignments they created for their audiences and the learners within their audiences.

1. From the Admin menu, select **LEARNING > Assignments**. The Assignments page displays.
2. Locate the draft assignment you wish to delete.
3. Click > **Delete**. The following message displays:



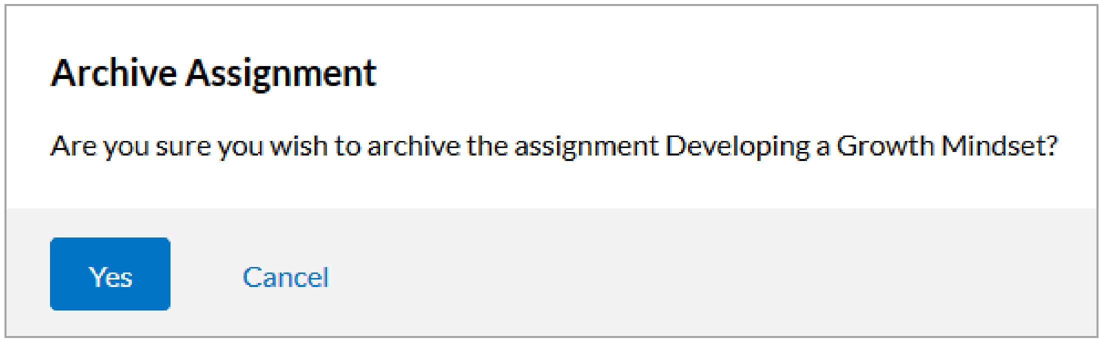
4. Click **Yes**. The assignment is immediately removed from the Assignments list.

Archive an In Progress Assignment

Archiving an assignment is irreversible, and the assignment is non-recoverable. You can only archive an In Progress assignment. Once archived, the assignment is no longer completable to those learners who have not finished it. You can still report on archived assignments.

Site Admins can archive In Progress assignments for any audience or learner in Percipio. **Learning Admins** can archive In Progress assignments they created for their audiences and the learners within their audiences.

1. From the Admin menu, select **LEARNING > Assignments**. The Assignments page displays.
2. Locate the In Progress assignment you wish to archive.
3. Click > **Archive**. The following message displays:



4. Click **Yes**. The assignment is immediately archived.

Add a Learner to an Assignment

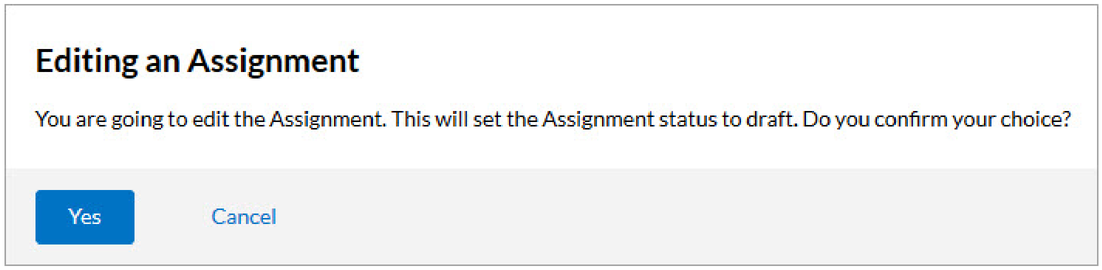
Site Admins and Learning Admins can add learners to assignments that are in a **Draft**, **Scheduled**, or **In Progress** status. **Site Admins** can add any learner or audience to any assignment, while **Learning Admins** can add only their audiences, and the learners within their audiences to assignments that they created.

If you need to add learners to an **Archived** assignment, [copy the assignment](#) and assign the learner to that new assignment.

To add a user to an assignment

1. From the Admin menu, select **LEARNING > Assignments**. The Assignments page displays.
2. Locate the assignment you wish to edit.
3. Click ⋮ > **Edit**.

   If you are editing a **Scheduled** assignment, click **Yes** when the following message displays:



4. Click **Add users and audiences**.
5. In the search field, enter the name of an audience or individual learner.
6. Click .
7. From the list of search results, locate the audience or learner you want to include in the assignment and click .
8. Repeat these steps until you've added all learners and/or audiences.
9. Click **Add to this Assignment**. The Edit Assignment page displays.
10. Click **Save Assignment** . If you have the initial notification email turned on for this assignment, learners will receive it immediately. Also, if default email reminders are on, new learners start receiving them as part of the regular assignment cadence.

> **Note:** If you remove a learner from an audience that has an assignment and the learner has **not completed** the assignment, the assignment no longer displays for the learner in their assignment list and they no longer show in assignment reports. If you remove a learner from an audience that has an assignment and the learner has **completed** the assignment, the assignment remains in their assignment list and their completion remains in assignment reports.

Schedule Default Email Reminders

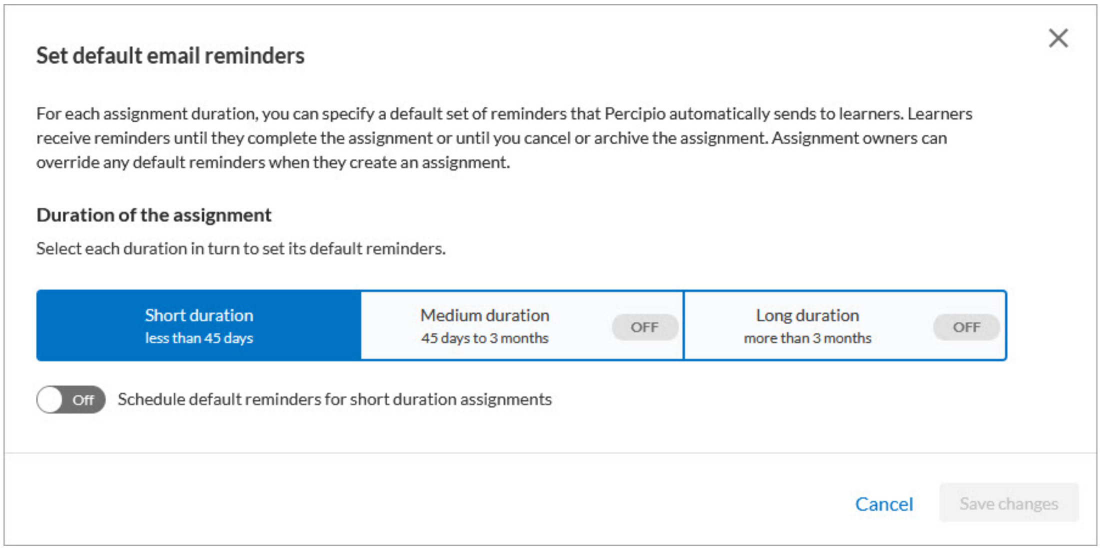
Site admins can configure Percipio to send email reminders automatically for all assignments. When you turn on reminders, learners automatically get regular emails, at a cadence you determine, reminding them to complete their assignment. The learner stops receiving reminder emails when they complete the assignment.

Site admins can define the schedule for default email reminders for all assignments at the organizational level so they don't have to be configured for each individual assignment. Then if needed, anyone with assignment privileges can modify the reminder schedule for individual assignments they create. To make changes to the default reminder schedule for any existing assignment, from the Assignment page, locate the assignment, then from the more actions menu, select Manage schedule. Even with the default email reminder schedule on, you can still choose to email learners independently of the schedule.

The setting for **Default email reminders** for assignments is off by default.

To locate the schedule for default email reminders:

1. From **Learning**, select **Assignments**.
2. Select **Default email reminders**. The Default email reminders page displays.



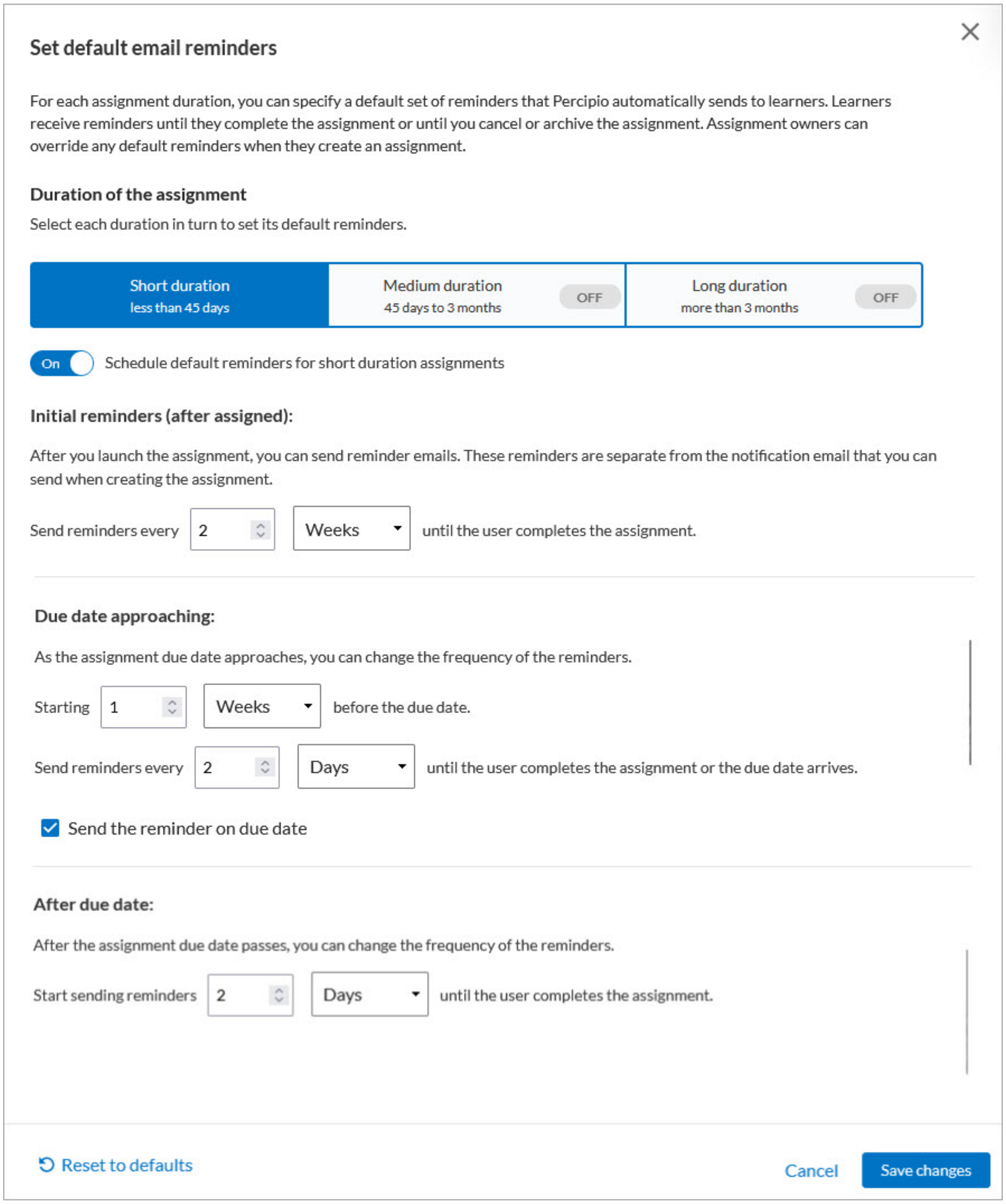
About default email reminders

Assignments may vary in duration with how long it takes to complete, which might necessitate the need for different email frequencies. You see three options for assignment duration:

- **Short:** Any assignment that is less than 45 days in duration is considered a short assignment. Short assignments might not require as many email reminders, at least initially.
- **Medium:** Any assignment that is at least 45 days in duration and less than 3 months is considered a medium assignment. Medium assignments might require more email reminders than short assignments after they launch to keep learners engaged.
- **Long:** Any assignment that is longer than 3 months in duration is considered a long assignment. Long assignments might require less email reminders initially after they launch and more reminders closer to the due date to keep learners engaged.

The duration setting only applies to the assignment's duration, not to the amount of time a learner has to complete the assignment. For example, if you create an assignment with a fixed due of March 31, which is 60 days from today, that assignment falls into the Medium duration. If a learner gets added to the assignment on March 11, even though they only have 20 days to complete the assignment, they still get the reminder frequency set for Medium duration assignments.

For each duration option, you see three segments of reminders:



- **Initial:** These reminders go out after the initial notification. Depending on the length of the assignment and the amount of content in the assignment, you may choose to send these more or less frequently. These email reminders use the Assignment coming due template including any customizations made for the initial notification.
- **Due date approaching:** As a due date gets closer, you can change the frequency of the reminders to give learners ample time to finish before the

due date. These email reminders use the Assignment coming due template including any customizations made for the initial notification.

- **After due date:**If the learner does not complete the assignment by their due date, you can set reminders to go at a different frequency than before the due date. These email reminders use the Assignment past due template, which cannot be customized at this time.

These duration options and reminder segments give you the maximum flexibility in configuring when Percipio sends out reminders. Skillsoft has supplied a default recommendation frequency for each assignment duration and segment and uses two standard email templates that have been researched and tested to ensure maximum learner engagement. You can add custom text to the Assignment coming due template when you create or edit the assignment.

Turn on default reminders

All reminders are off by default. When you turn on default reminders all in-progress and new assignments get the default reminder setting. To make changes to the default reminder schedule for any existing assignment, from the Assignment page, locate the assignment, then from the more actions menu, select Manage schedule.

To turn on and configure your default reminders:

1. Select the duration tab you want: Short, Medium, Long.
2. Turn on the reminders for that duration.
3. For each duration and segment, Skillsoft shows a recommended frequency. Make any adjustments to the three segments of reminders: Initial, Due date approaching, After due date. If you make changes that you don't like, you can select **Restore to defaults** to go back to the recommended frequencies.
4. Select **Save changes**.
5. Repeat steps 1 through 4 for the other durations.

Note: The learner stops receiving reminder emails when they complete the assignment.

Turn off default reminders

When you turn off default reminders, reminders are removed from all in-progress and new assignments unless you overrode the default settings for an individual assignment. Individual assignments that have their own schedule keep that schedule when you turn off default reminders. If you turn off default reminders, you can still manually send a reminder through email.

To turn off any default reminders:

1. Select the duration tab you want: Short, Medium, Long.
2. Turn off the reminders for that duration.
3. Select **Save changes**.

Manage Schedule for Reminder Emails

For any assignment you create, you can schedule automatic email reminders to go to all learners who have not yet completed the assignment. When learners receive email reminders, they are more likely to complete their assignment. The learner stops receiving reminder emails when they complete the assignment.

These reminders may be on by default if your site admin turned on and configured default email reminders. No matter how default email reminders are configured or whether they are turned on or off, you can choose how your individual assignment uses the email reminders by overriding any default settings.

> **Note:** If you add customized text in the initial email notification when you create the assignment, those customizations are also used in the one-off email reminders and both the reminder emails that go prior to the due date as part of the reminder schedule.

To manage the email reminder schedule for your assignment:

1. From the Admin menu, select **LEARNING > Assignments**. The Assignments page displays.
2. Locate the assignment for which you want to configure the email reminder schedule.
3. Select the more actions menu ⋮, and then **Manage Schedule**.
4. You have three options at this point:
   a. If the reminders are off and you want them on, select **On**.
   b. If the reminders are on and you want them off, select **Off**.
   c. If the assignment is on and you want to modify any default settings, make any adjustments to the three segments of reminders: Initial, Due date approaching, After due date. If you make changes that you don't like, you can select **Restore to defaults** to go back to the recommended frequencies.
5. Select **Save changes**.These changes are saved independent of the default email reminders. Any changes to the default email reminder schedule does not impact your saved schedule changes for this assignment. If you made schedule changes to an in-progress assignment, reminders follow the criteria you set and only go to users who haven't completed the assignment.

To edit the email text for reminders coming due:

By default, learners receive the same assignment email for all reminders before the due date and a different one for assignments that are past due. For email template details, see assignment emails.

If you add customized text in the initial email notification when you created the assignment, those customizations are also used in the one-off email reminders and in the initial and due date approaching reminders that go as part of the reminder schedule. At this time you cannot edit emails that go out for assignments that are past due.

To edit email text for reminders coming due, see edit assignments.

Send a Reminder Email

Site Admins can send a reminder email for any assignment, for any audience or learner, in Percipio. **Learning Admins** can send a reminder email to their audiences and the learners within their audiences for any assignment they created.

As a Site or Learning Admin, you can send a reminder email to all users that have not yet completed an assignment.

To send an immediate email for an assignment:

> **Why send this email?**
> Your learners received the assignment email on the assignment's Start date, and you want to send another assignment email as a reminder for them to complete the assignment.

1. From the Admin menu, select **LEARNING > Assignments**. The Assignments page displays.
2. Locate the assignment for which you want to send a reminder email.

1. Click ⋮ > **Email**.
2. When the confirmation message displays, click **Yes**.

The email is sent immediately to all learners who have not yet completed the assignment.

Notifications and Learner Engagement

Percipio-generated emails and push notifications, along with Digital Badges, can help you increase license consumption and adoption of Percipio content offerings. Admins can customize some email notifications, and not others.

About push notifications

Push notifications show for users who are using the Percipio mobile app. To receive push notifications, users must have push notifications turned on for the Percipio app and also have the individual notifications turned on. Admins cannot customize any push notifications.

Percipio-generated push notifications for the mobile app include:

- Learning goal reminders: Admins can choose to turn on these system-generated emails for all users in the company. Users can disable them from the Settings menu in the mobile app.
- Learning reinforcement push notifications: Admins can choose to turn on these system-generated emails for all users in the company. Users can disable them from the Settings menu in the mobile app.
- **Assignment push notifications**: Users cannot disable these notifications. When admin make an assignment and choose to send an email, learners automatically get an assignment push notification.

About email notifications

Users only receive email notifications if they have an email address defined for their Percipio user account and an admin configures the system to send them. From the Account information page under a user's profile, users can add an email address and choose which email notifications they wish to receive.

Admins can customize some email notifications.

Learner email notifications:

A learner could receive any of the following email notifications:

- Assignment emails: Users cannot disable these notifications. Admins can choose whether to send these emails when they create an assignment. Admins can customize this email.
- Career journey emails: Users cannot disable these notifications. Admins can choose whether to send these emails after they associate a Career Journey license pool with an audience. Admins can't customize this email.
- Welcome emails: Users cannot disable these notifications. Admins can choose whether to send these emails when they create a Percipio user account. Admins can customize this email.
- Recommendation emails and Re-engagement emails: Users can opt out of these by turning off: **Learning Reminders (once a week)**. Admins can choose to turn on these system-generated emails for all users in the company. Admins can customize re-engagement emails, but not recommendation emails.
- Live course emails: Users cannot disable these notifications. Admins can choose to turn on these system-generated emails for all users in the company. Admins can't customize these email notifications.
- Digital Badge emails: Users can opt out of these by turning off: **Badge Earned (up to twice weekly)**. Admins can choose to turn on these system-generated emails for all users in the company. Admins can't customize this email.

Admin email notifications:

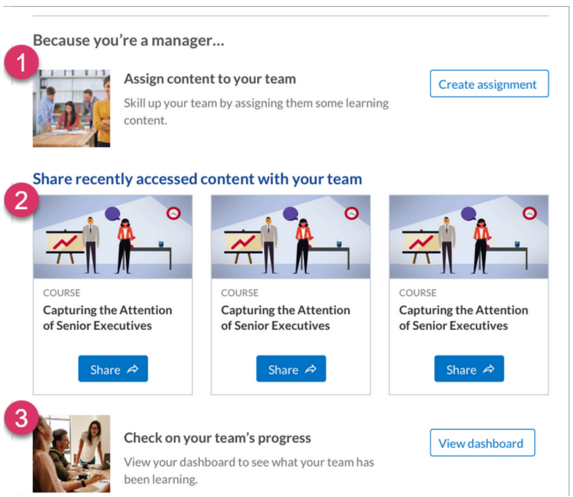
An admin could receive any of the following email notifications in addition to those received by learners:

- Audience owner emails: Users cannot disable these notifications. Admins can choose whether to send these emails when they make a user an owner of an audience. Admins can't customize this email.
- Live course emails: Users cannot disable these notifications. Admins can choose to turn on these system-generated emails for all users in the company. Admins can't customize these email notifications.
- Retiring and recently added content emails: Users can disable this notification. Admins can choose to turn on these system-generated emails for all admins in the company that can access this report. Admins can't customize this email.

Additional information about emails

- Percipio reminds all site admins to send Welcome emails, so there is no need to remember on your own.
- Percipio-generated emails are supported for both SAML and non-SAML users, based on your site configuration.
- Percipio-generated emails are accessible.
- Recipients can open the emails on any device.
- Supported languages include English, French, German, Spanish, Brazilian Portuguese, Mandarin Chinese, Japanese, Swedish, Finnish, and Greek. You can set the default email language on the Email Settings page.
- Learners can opt out of some emails at any time.
- Percipio runs a nightly program to generate recommendation and re-engagement emails at approximately 12:00 a.m. and 3:00 a.m. UTC/GMT Monday through Friday. Your learners receive these emails only once per week on a specific day as designated for your Percipio site.

- Learners receive Digital Badge emails on Mondays and Thursdays only if they have new badge activity.
- You can choose to send a single Welcome email instead of the Welcome and reminder emails.
- User data is encrypted.
- No PII data is ever shared with third parties unless you designate it.
- Users with a Percipio role of manager, see an additional section at the bottom of the Recommendation, Re-engagement, Digital Badge, or Audience owner emails as a way to encourage managers to promote learning with their teams. For every email, Percipio randomly chooses one of the following options to put in this section:
  1. Assign content to team (this option only displays if managers have the custom privilege to assign content.)
  2. Share recently accessed content with team
  3. Check on team's progress



About Digital Badges

Digital Badges are visual, sharable, and verifiable records of accomplishment enabling learners to socialize their achievements and growth. Digital Badges are issued upon successful completion of Skillsoft course assets delivered through Percipio.

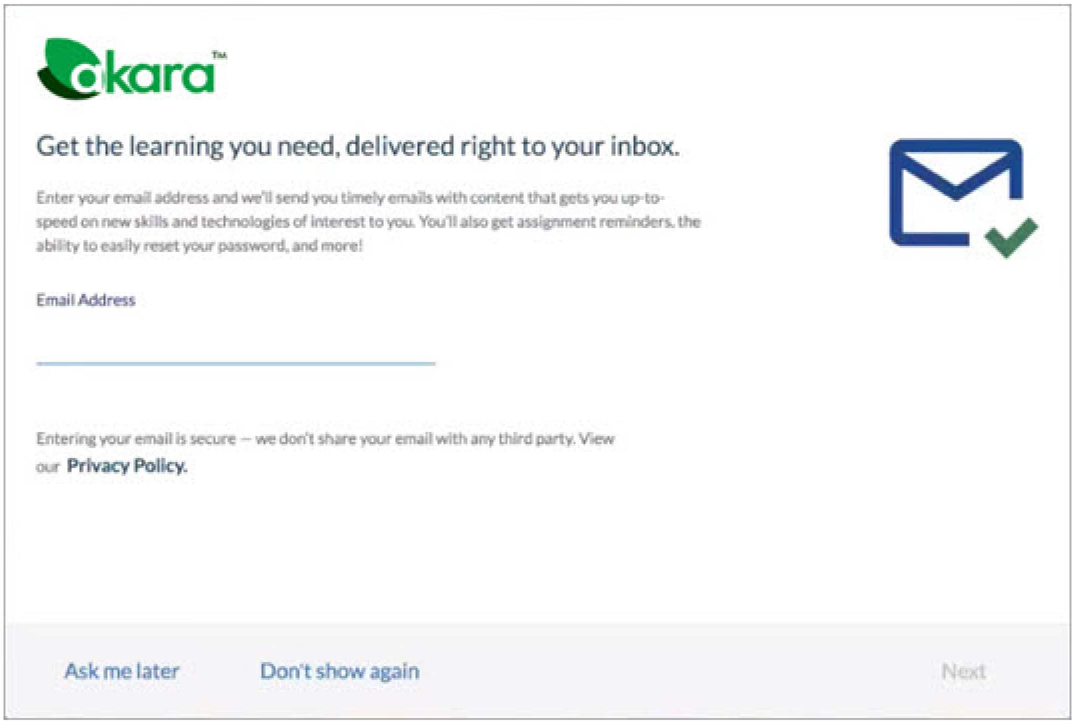
For more information on Digital Badges, see Digital Badges for Learner Engagement.

Email Collection

When you and your Site Admins create a new user in Percipio, you have the option to include an email address. This email address is not shared with any third parties per our Privacy Policy, and it enables Percipio to send your users password reset emails, Welcome emails and reminders, assignment reminders, new content offerings, and more.

If you do not include an email address during user creation, Site Admins can add it by editing the user profile. See Edit an Existing User or Update Existing Users by Bulk Import for procedures.

When signing in to Percipio, if users do not have an email address in their user profile, Percipio displays a notification that asks them for it:



By default, this setting is available on all Percipio sites. If you prefer Percipio to not collect emails directly from your users, you can disable email collection and add the email addresses via the email field on the Edit a User page or using the bulk import feature.

Turn On Email Collection

By default, this setting is available on all Percipio sites. When you turn on this setting, a message displays to all learners who do not have an email address already in their user profile.

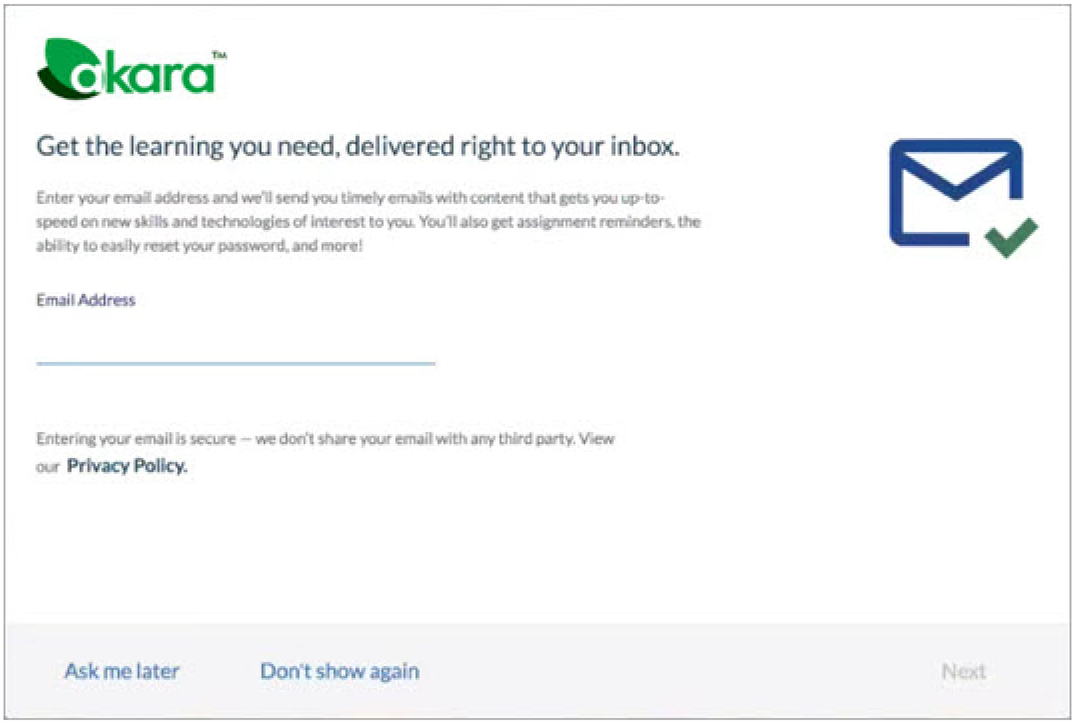
> **Note:** The logo for this engagement is set via the Site Branding page.

To turn on the Percipio email collection notifications

1. On the Admin menu, select **SETTINGS** then **Engagement & Notifications**and **Email Settings**.

2. In the Email collection section, turn on the **Allow Percipio to collect email addresses if missing** toggle. The setting updates immediately.

   When learners who do not have an email in their profile next sign in, they are presented with the following dialog:

Turn Off Email Collection

By default, this setting is available on all Percipio sites. If you prefer Percipio to not collect emails from your users directly, you can turn off this feature and add the email addresses when you Edit a User page or you can Update Existing Users by Bulk Import.

To disable the Percipio email collection notification

1. On the Admin menu, select **SETTINGS** then **Engagement & Notifications**and **Email Settings**.

2. In the Email collection section, turn off the **Allow Percipio to collect email addresses if missing** toggle. The setting updates immediately.

Assignment Emails

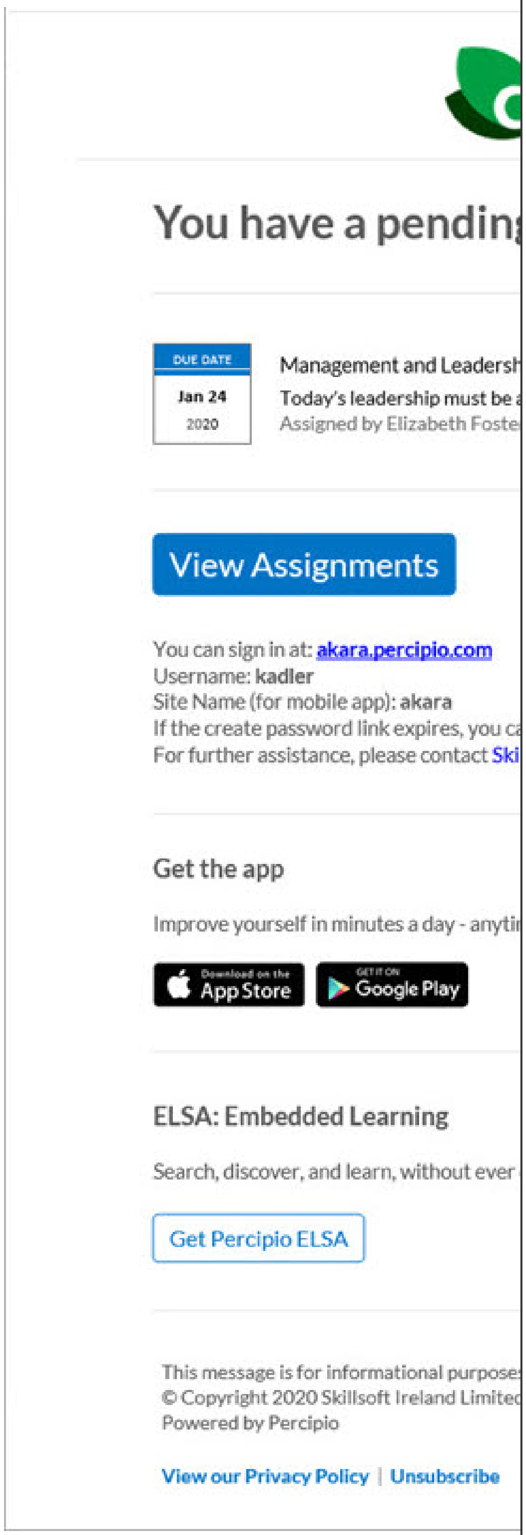
Assignment emails contain the details of and links to assigned content in Percipio.

When you create a new assignment, you can use the Notify Users page to specify the date and time to send an initial email notification to learners, and to add a custom message to the Assignment coming due template. If you add customized text in the initial email notification when you create the assignment, those customizations are also used in the one-off email reminders and both the reminder emails that go prior to the due date as part of the reminder schedule.

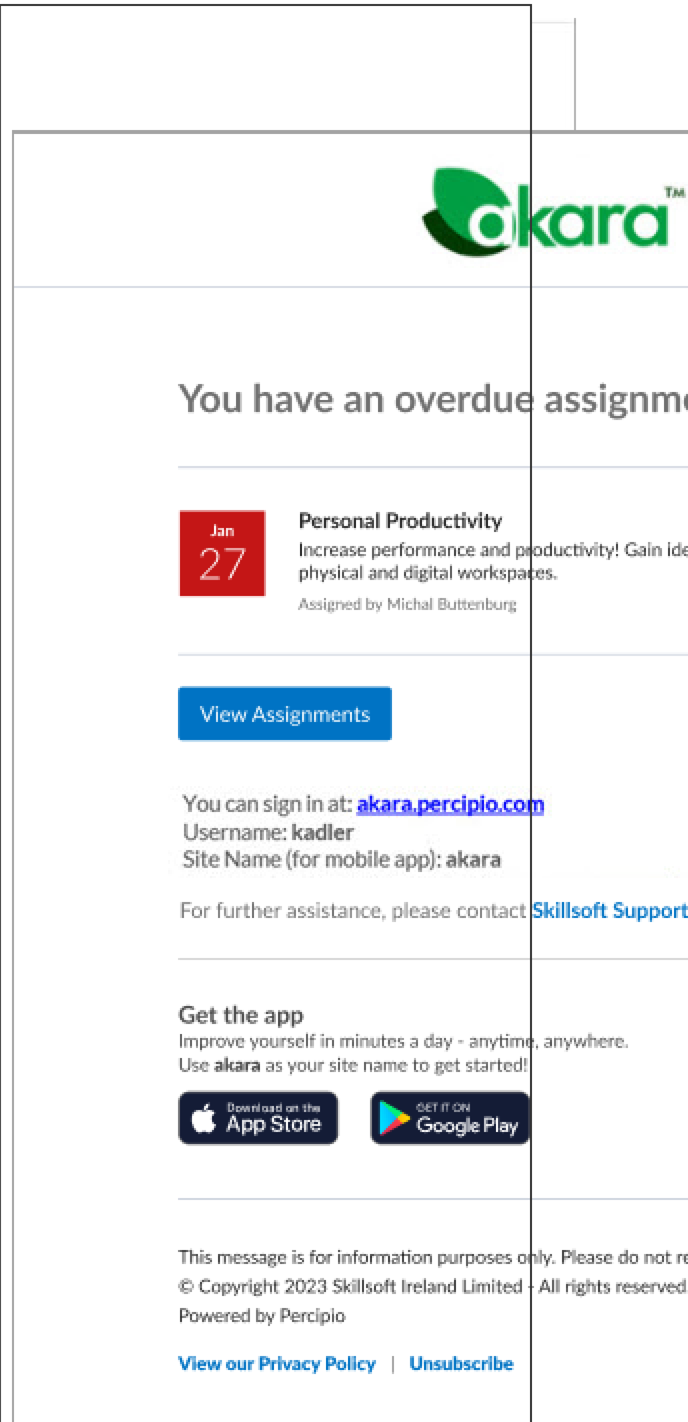
When you edit an assignment, you can change any customizations made to the Assignment coming due template. These changes apply to any email reminders Percipio sends prior to the due date, whether that is a one-off email or part of the schedule reminder series.

When you brand your emails to change your logo or colors, those changes are also reflected in the assignment emails. Percipio offers two assignment email templates, one for when an assignment is coming due and another for when an assignment is past due.

Assignment coming due	**Assignment past due**



Custom text can be added.



Cannot be customized at this time.

Email triggers

- **Initial assignment notification:** You turn on this initial notification when creating an assignment and set a date on which to send this initial notification. You can add custom text here that gets added to the Assignment coming due email template. Percipio sends this email according to the scheduled send date in the assignment, or immediately if a learner is added to an assignment that is already in progress.
- **One-off assignment reminder emails:** You can send a one-off reminder email immediately when you select **Email** from the More actions menu on the Assignments page. If you send these email reminders prior to the due date for the learner, the learner sees the Assignment coming due template including any customizations made for the initial notification. If you send these email reminders after the due date for the learner, the learner sees the Assignment past due template, which you can't customize.
- **Schedule email reminders:** You can configure email reminders at the organizational or individual assignment level. Percipio sends the reminder emails automatically to learners until they complete the assignment. Percipio sends these reminder emails based on the assignment duration and the frequency set for each reminder segment: Initial, Due date approaching, and Past due. Both Initial and Due date approaching email reminders use the Assignment coming due template including any customizations made for the initial notification. Past due reminders use the Assignment past due template, which cannot be customized. Learners receive all reminder notifications until they complete the assignment.

Welcome Emails

Welcome emails are sent directly to your learners from Percipio. The email contains a link that when clicked automatically signs the user into Percipio. The link is active for 60 days and can only be used once.

If the learner attempts to click the link a second time, the link takes the learner to the login page of Percipio. The learner then has to enter their username and password. If the learner does not have an initial password set by the administrator, they receive a separate email with their password for subsequent sign ins.

Only learners receive this type of welcome email. Any other Percipio user role who receives a welcome email, is provided a link to the site, a username and temporary password.

There are two options for welcome email delivery:

- a series of six welcome and reminder emails
- a single welcome email

Welcome and reminder emails

Percipio can send an initial welcome email to all new and updated learners who have not received one before, along with a series of subsequent reminder emails. These are proven to increase user engagement and site traffic. For details, see the Why use welcome and reminder emails? section below.

These emails are personalized, using the learner's name, organization name, and user-entitled content, in order to help drive more of your learners to sign in and engage with Percipio. You can also customize the welcome email, choosing a subject line, header, preheader, and introductory text. See Customize Welcome and Reminder Emails.

The first email (the **initial welcome email**) contains a link to your site that when clicked, automatically signs the learner into Percipio. The five subsequent emails (**reminder emails**) are sent only if a learner does not sign in. These reminder emails are sent every 3 days until either the learner signs in or until all five are delivered.

Why use welcome and reminder emails?

Adopters of the welcome and reminder emails observed increases in the following:

- Adoption rates
- Overall traffic
- Number of learner sign-ins
- Number of page views
- Number of sessions
- Duration of sessions

How do they work?

Welcome emails and follow-up reminders are sent in a series, depending upon the learner's engagement.

The first email (the **initial welcome email**) contains a link to your site that when clicked, automatically signs the learner into Percipio.

Five subsequent emails (**reminder emails**) are sent only when a learner does not sign in. These emails are sent every 3 business days until either the learner signs in or until all five are delivered.

How can I enable the welcome and reminder email series?

From **Settings**, select **Engagement & Notifications** and then **Email Campaigns** and select one of the **Sending Welcome Emails to new users** options to choose the series.

How are the emails triggered?

Initial Welcome email: Percipio delivers the initial Welcome email when you:

- select the **Send Welcome email** checkbox on the New User page, specify a date, and click **Create**,
- select the **Send Welcome email** checkbox on the Edit User page, specify a date, and click **Update**,
- select the **Send bulk Welcome emails** checkbox on the Import User page, specify a date, and click **Import**, or
- click the **Send Welcome emails** button on the Email Campaigns page.

Follow-up reminder emails: Percipio delivers follow-up reminder emails after the initial email is delivered, 3 days have passed, and the learner has not yet signed in. Follow-up emails are sent every few days until the learner signs in or until all five are delivered, whichever comes first.

How can I monitor my email performance?

For new sign-ins

- After you send out the Welcome emails, view data about the new sign-ins via the License Consumption report and the **New vs. returning users** chart on the Overview dashboard.

For traffic increase

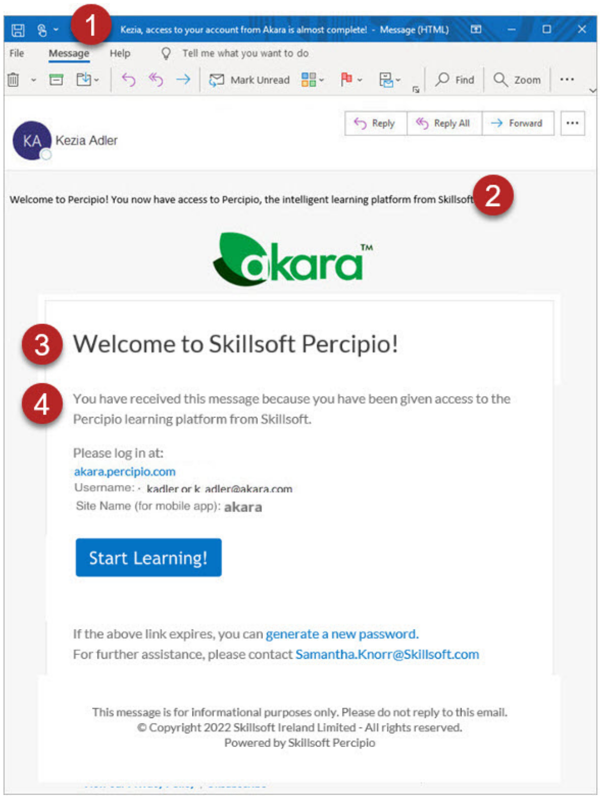
- Filter the User Listing report to view first-time sign ins for a date range beginning the day you send out the Welcome email.

What do the non-SAML organization Welcome and reminder emails look like?

If your learner signs in with a Percipio user name and password (non-SAML), they can see up to six welcome emails. Learners who do not sign in after receiving the initial Welcome email are sent up to five additional emails until they do sign in, or until all emails are delivered.

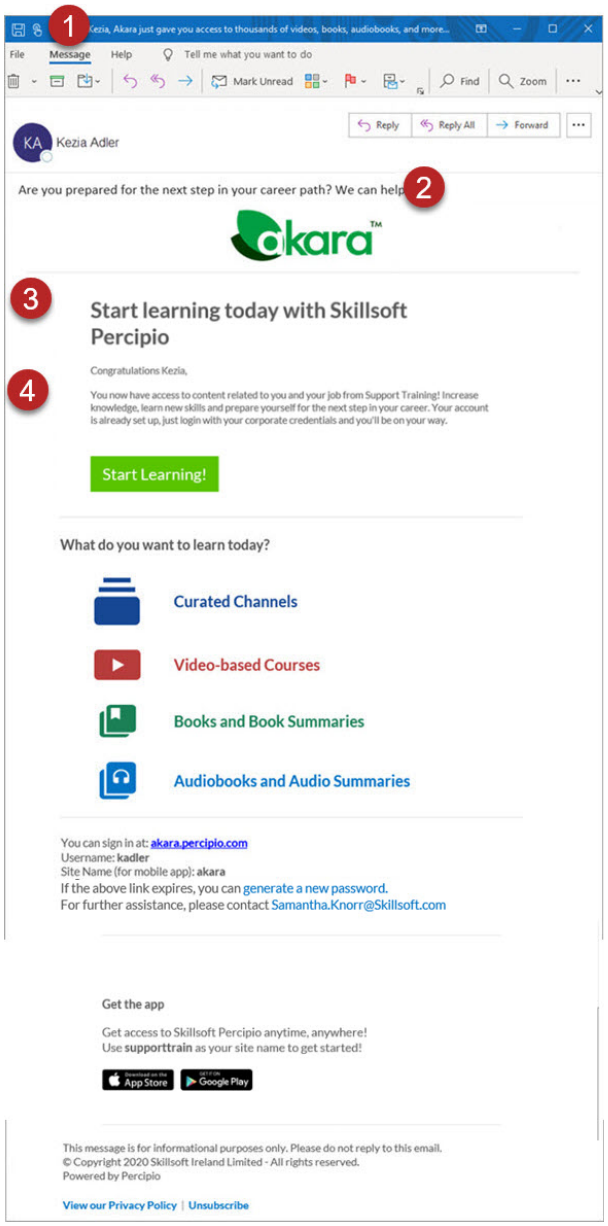
You can customize the welcome email series by choosing a template style and then specifying a subject line, header, pre-header, and introductory text for each of the six emails.

Template #1 : Selected by default for the initial Welcome email #1 and the reminder email #4.



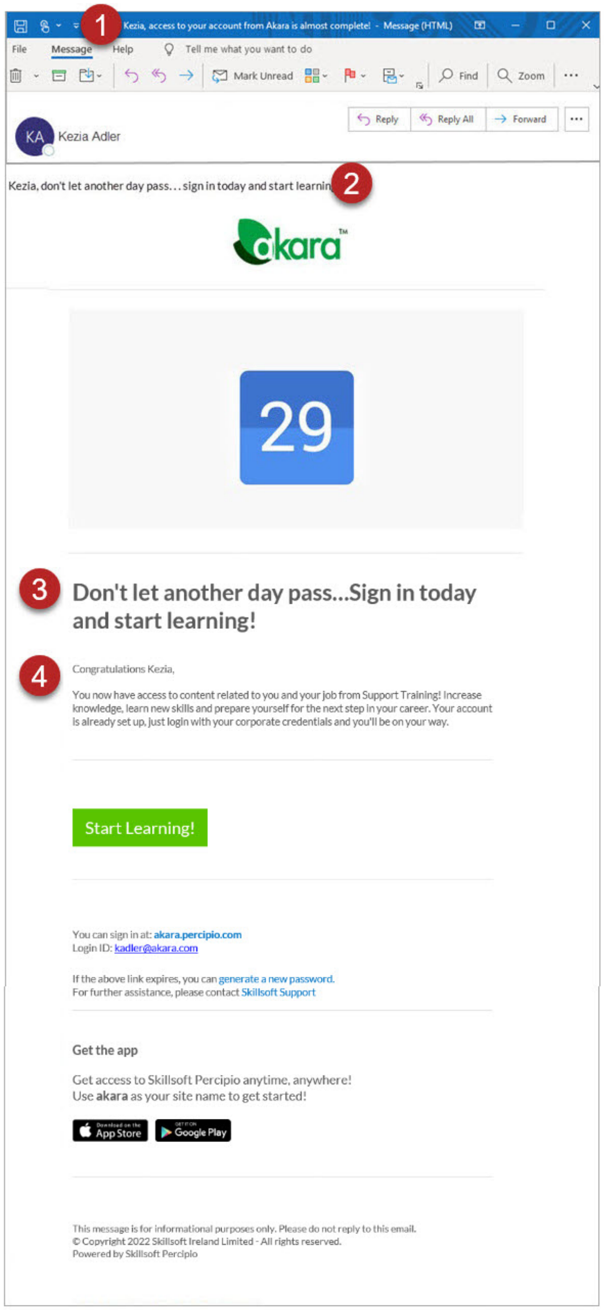
1. Subject line
2. Preheader text
3. Header text
4. Introductory text

Template #2: Selected by default for reminder emails #2 and #5.



1. Subject line
2. Preheader text
3. Header text
4. Introductory text

Template #3: Selected by default for reminder emails #3 and #6.



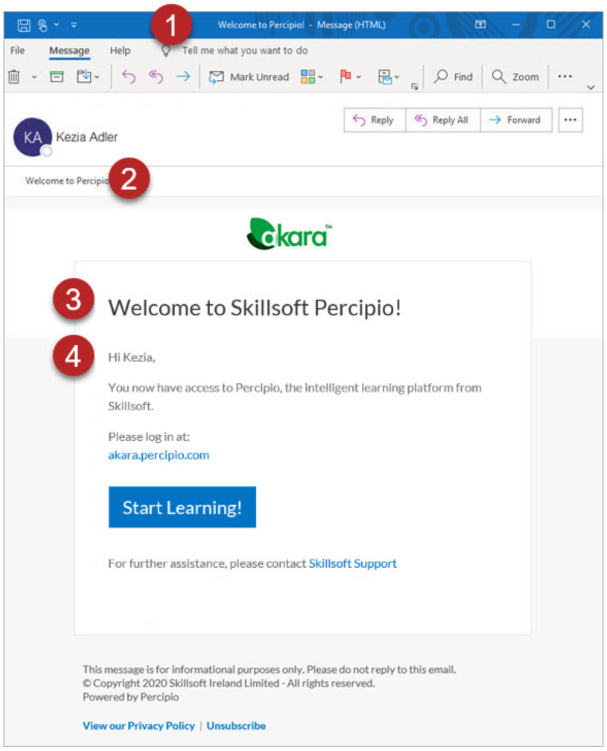
1. Subject line
2. Preheader text
3. Header text
4. Introductory text

What do the SAML-enabled organization Welcome and reminder emails look like?

If your learners sign in using corporate credentials (SAML), they can see up to six welcome emails. Learners who do not sign in after receiving the initial Welcome email are sent up to five additional emails until they do sign in, or until all emails are delivered

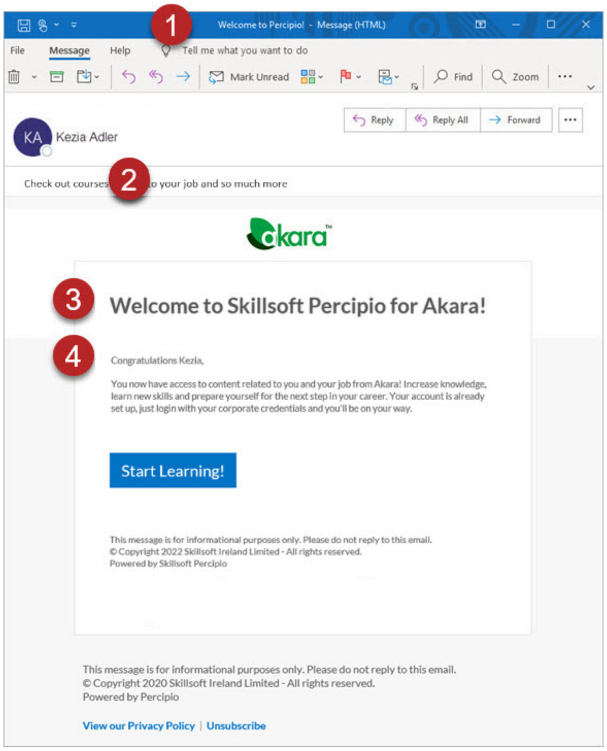
You can customize the welcome email series by choosing a template style and then specifying a subject line, header, pre-header, and introductory text for each of the six emails.

Template #1 : Selected by default for the initial Welcome email # 1 and reminder email #4.



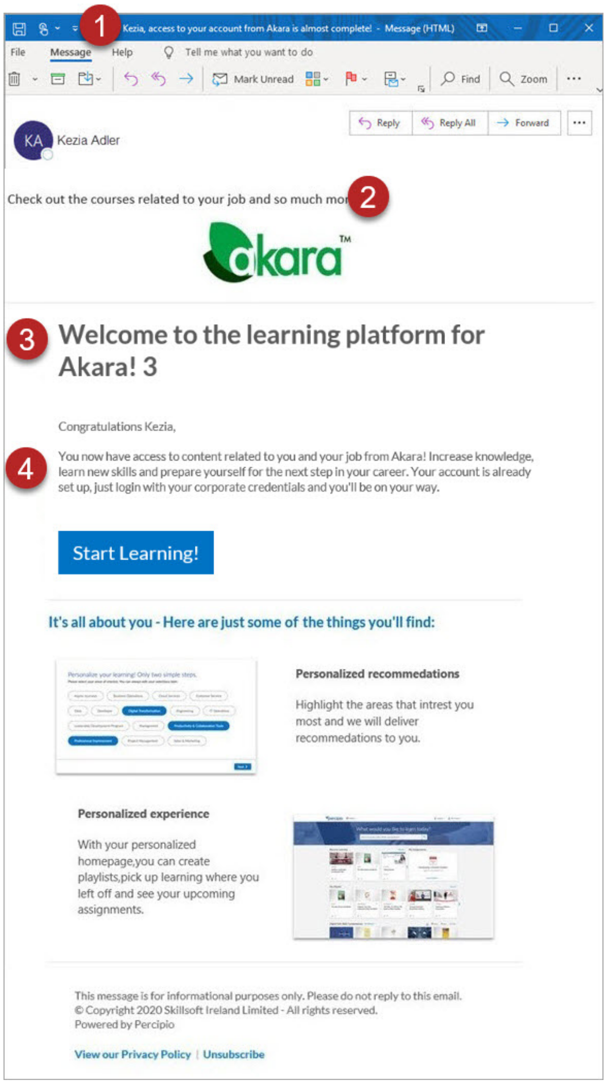
1. Subject line
2. Preheader text
3. Header text
4. Introductory text

Template #2: Selected by default for reminder emails #2 and #5.



1. Subject line
2. Preheader text
3. Header text
4. Introductory text

Template #3: Selected by default for reminder emails #3 and #6.



1. Subject line
2. Preheader text
3. Header text
4. Introductory text

Can I customize the welcome and reminder email series?

Yes, on the Email Campaigns page, select **Custom** in the **Email Template** field and then click the **Edit email** button. On the Configure Welcome Email Series page, you can change the header, subject, preheader, and introductory text for each of the six emails.

For more details, see Customize Welcome and Reminder Emails.

Single welcome email

If you do not want Percipio to send a series of welcome and reminder emails, you can opt to send a single welcome email with a one-time link for your learners to sign into Percipio. If they click the link again, they are prompted to sign in using Percipio credentials or Single sign-on credentials. If Percipio does not have a password on file for the user, Percipio sends a separate email to the learner that allows them to set a password.

How is the single Welcome email sent?

Use the **Sending Welcome Emails to new users** setting on the Email Campaigns page to choose a single welcome email.

A single welcome email is sent when you:

- select the **Send Welcome email** checkbox on the New User page, specify a date, and click **Create**,
- select the **Send Welcome email** checkbox on the Edit User page, specify a date, and click **Update**,
- select the **Send bulk Welcome emails** checkbox on the Import User page, specify a date, and click **Import**, or
- click the **Send Welcome emails** button on the Email Campaigns page.

For more details, see Send a Single Welcome Email.

Can I customize the welcome email?

Yes, on the Email Campaigns page, select **Custom** in the **Email Template** field and then click the **Edit email** button. On the Configure Welcome Email Series page, you can change the header, subject, preheader, and introductory text.

For more details, see Customize Welcome and Reminder Emails.

Welcome Email Best Practices

- Learners should be loaded into Percipio ahead of time in order to leverage the welcome email capabilities, otherwise, there are no email addresses on file to be able to send emails to your learners.
    - This is especially important for organizations who auto-provision SSO.
- Before you send welcome emails, let your learners know that a Percipio welcome email is coming their way. When possible, send emails from a high-ranking person in your organization.
- To kick off your campaigns or to increase adoption at any time, go to the Engagement & Notifications page and click **Send Welcome emails** to send emails to all users not signed in. This also displays how many learners received the welcome email.
- When you create a new user in Percipio, always provide at least the first name and email address to allow email personalization. We recommend that you also require users to reset their passwords.
- Specify the organization name you want to display in Percipio's emails to ensure your learners know it's from your company, and therefore, links are safe to click.
- Optionally, use that same organization name in the custom "From" email address on your welcome emails. Just check the box in the Organization Name section on the Engagement & Notifications page.
- Apply organization-specific branding to all emails.
- Monitor how well the email is performing:
    - New sign-ins
        - After you send out the Welcome emails, view data about the new sign-ins via the License Consumption report and the **New**

vs. returning users chart on the Overview dashboard.

- Traffic increase
    - Filter the User Listing report to view first-time sign ins for a date range beginning the day you send out the Welcome email.

Enable Welcome and Reminder Emails

To get the most engagement within your Percipio site, use the series of welcome and reminder emails.

> **Note:** By default, the series of welcome and reminder emails is enabled.

With the series, once an initial welcome email is sent, if your user does not sign in within a few days, another email is sent, reminding them of the benefits Percipio can bring to their career. This email series continues until the user signs in, or until a total of 6 emails are delivered.

To enable welcome and reminder emails

1. On the Admin menu, select **SETTINGS** then **Engagement & Notifications**and **Email Campaigns**.
2. In the **Welcome emails** section, choose **Send full welcome email series to new users (6 emails) by default**.
3. To customize the series, select **Custom** in the **Email Template** field and then select the **Edit email** button. The Configure Welcome Email Series page displays, where you can customize the subject line, header, pre-header, and introductory text for each of the six emails. For more information, see Customize Welcome and Reminder Emails.

Resend the Welcome and Reminder Emails

You can resend the welcome email and reminder emails to individual users at any time. The email provides the user name, a temporary password, and a link to your site.

> **Note**: You can also send the welcome email and reminder emails to all users who have not yet signed into Percipio. For instructions, see Engagement and Notifications.

1. On the User List page, locate the user to whom you want to send the email.
2. In the **Actions** column, click the More actions icon ⋮, then click the Edit icon.
3. On the Edit User page, click the **Resend Welcome email** link.

   The email sends immediately. If in a few days the learner does not sign in within a few days, additional reminder emails are sent until sign-in occurs, or a total of six emails are delivered.

Important information about the welcome and reminder emails

- The date and time are based on your local system settings, not the recipients' settings.
- The welcome email contains sign in instructions and a link to your Percipio site.
- The learner must have a status of **active** and a valid email address included in the profile to receive the welcome email.
- Your welcome email settings determine if the learner receives the welcome and reminder emails series or a single welcome email.

- If you scheduled a single welcome email to be sent while uploading users, you can cancel the email by clearing the option prior to the scheduled send date.

Enable Single Welcome Emails

> **Note:** Disabling the Welcome and reminder email series can decrease your user engagement in Percipio. We recommend keeping the series enabled rather than using a single Welcome email.

To enable single welcome emails

1. On the Admin menu, select **SETTINGS** then **Engagement & Notifications**and **Email Campaigns**.
2. In the **Welcome emails** section, choose **Send a single welcome email to new users by default**.
3. To customize the email, click the **Configure Email** button. The Configure Welcome Email page displays, where you can customize the subject line, header, preheader, and introductory text. For more information, see Customize Welcome and Reminder Emails.

Send a Single Welcome Email

The welcome email contains a link that automatically signs the learner into the Percipio site. The learner has up to 60 days to click the link before it expires. See Welcome Emails for important information about these emails.

You must enable single welcome emails prior to sending one. The default is a series of welcome and reminder emails.

To send a single welcome email

> **Note:** Skillsoft recommends that you notify your learners to expect this Welcome email. Alerting your learners to this email can increase the number of users who sign in.

For a new user

1. On the User Management page, click **New User**.
2. Enter the information for the user profile. See Create a New User for details.
3. Select the **Send the Welcome Email** option.
4. Select a date and time.

   > **Note:** The date and time are based on your local system settings, not the email recipients' settings.

5. Click **Create**.

For an existing user who has not yet received a Welcome email

You can send a welcome email to individual learners at any time. The email provides a one-time link that when clicked, automatically signs the learner into Percipio.

1. On the User Management page, locate the learner to whom you want to send the email.
2. In the **Actions** column, click ⋮, then click ✎.
3. On the Edit User page, select the **Send the Welcome Email** option.

4. Select a date and time.

   Note: The date and time are based on your local system settings, not the email recipients' settings.

5. At the bottom of the page, click **Update**.

For multiple new or existing users (bulk import)

1. From the User Management page, click **Import**.
2. On the **IMPORT** tab, choose the file you want to import and click **Open**.
3. Select **Send bulk Welcome Emails**.
4. Select a date and time.

   Note: The date and time are based on your local system settings, not the email recipients' settings.

5. Click **Import**.

To resend a single welcome email

You can resend a welcome email to individual learners at any time. The email provides a one-time link to your site. The learner has up to 60 days to click the link before it expires. To send a welcome email to all learners who have not yet signed into Percipio, see Engagement and Notifications.

1. On the User Management page, locate the user to whom you want to send the email.
2. In the **Actions** column, click ⋮, then click ✏.

3. On the Edit User page, click the **Resend Welcome email** link.

   The email sends immediately.

Important information about the Welcome email

- The welcome email contains a link to your Percipio site that when clicked automatically signs the learner into Percipio. It is a one-time link. If a learner clicks that link a second time, the learner is prompted to sign into Percipio with the login credentials or via SSO.
- The learner must have a status of **active** and a valid email address included in the profile to receive the welcome email.
- If you scheduled a single welcome email to be sent while uploading users, you can cancel the email by unchecking the option prior to the scheduled send date.

Recommendation Emails

If your learners are active, and accessed Percipio content within the last 30 days, a Recommendation email is available to them. When you enable Recommendation emails, Percipio sends a weekly, personalized email that includes new and recommended content as a reminder to continue learning.

Recommendation emails are meant to work with our Re-engagement emails, which are sent to users who are not active on Percipio. By enabling both emails, most of your learners receive a relevant, personalized email with recommendations. These emails are a proven, effective way to drive learner engagement by reminding your learners about Percipio's content and resources.

Learners with an email address in their profile receive Percipio-generated emails during the work week (Monday through Friday). They can opt out of these emails any time via their Account Information page or from the Unsubscribe link at the bottom of each email.

These emails capture learners' attention with personalized subject lines and learning recommendations based on recent activity, content to resume, and the skills in their profiles. The recommendations include all content types, including custom and linked content. When learners click on a link within the email, they are automatically logged into Percipio with the corresponding page or content item opened. The automatic login only works once per email per user and expires after 60 days. That means, if learners attempt a second click within the email, they are prompted to log in.

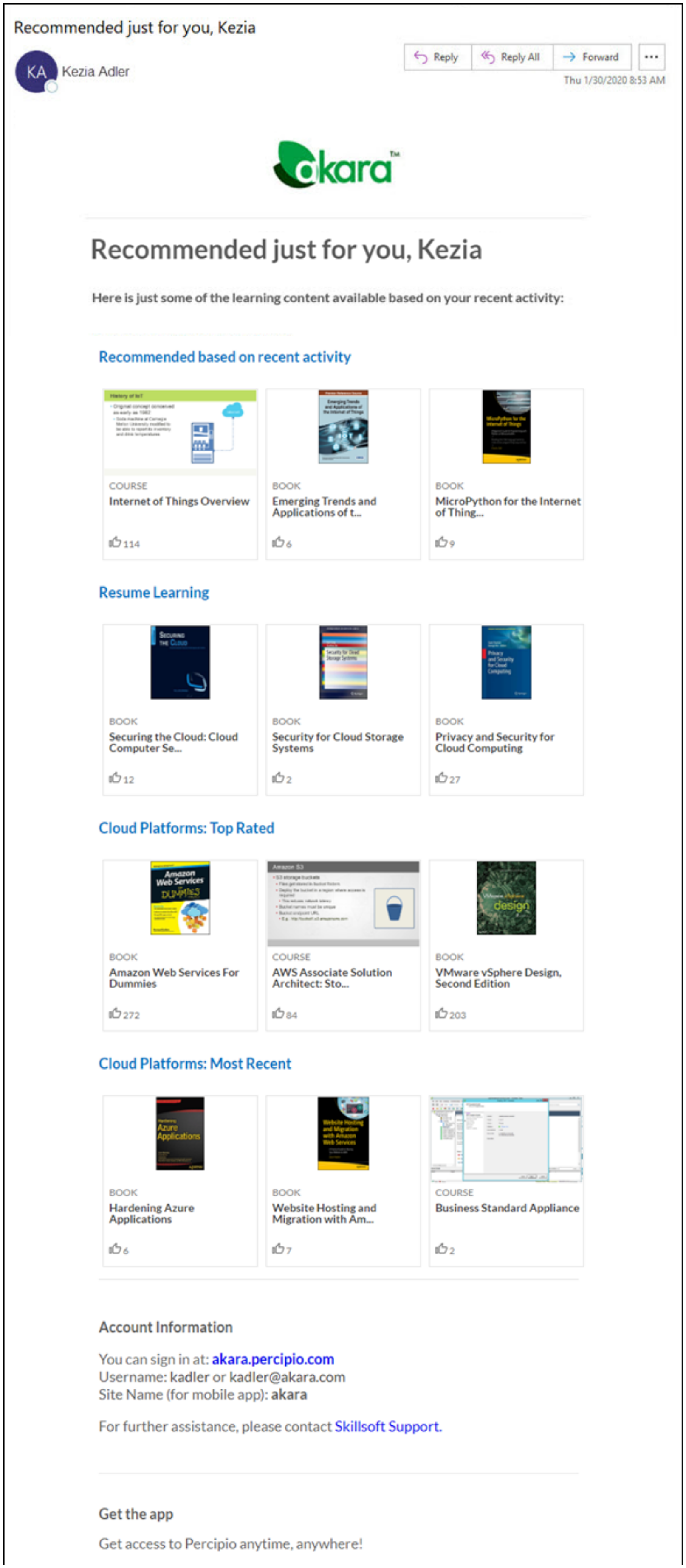
You can:

- Specify your organization’s name to display in Percipio’s emails to ensure your learners know the email is from your company and that the links are safe to click.
- Customize your logo and organization colors. You cannot edit the content of these emails.

> **Note:** To send a weekly email to those learners who have not accessed content in 30 or more days, see Re-engagement Emails.

What does the Recommendation email look like?

The Recommendation email includes content suggestions based on the learner's recent activity, content to resume, and selected skills. The recommendations include all content types, including custom and linked content. It also includes the learner's login ID, a link to the site, and the site name for Mobile App access.


Recommended just for you, Kezia

KA Kezia Adler

Reply | Reply All | Forward | ...

Thu 1/30/2020 8:53 AM

akara™

Recommended just for you, Kezia

Here is just some of the learning content available based on your recent activity:

Recommended based on recent activity

COURSE
Internet of Things Overview
114

BOOK
Emerging Trends and Applications of t...
6

BOOK
MicroPython for the Internet of Thing...
9

Resume Learning

BOOK
Securing the Cloud: Cloud Computer Se...
12

BOOK
Security for Cloud Storage Systems
2

BOOK
Privacy and Security for Cloud Computing
27

Cloud Platforms: Top Rated

BOOK
Amazon Web Services For Dummies
272

COURSE
AWS Associate Solution Architect: Sto...
84

BOOK
VMware vSphere Design, Second Edition
203

Cloud Platforms: Most Recent

BOOK
Hardening Azure Applications
6

BOOK
Website Hosting and Migration with Am...
7

COURSE
Business Standard Appliance
2

Account Information

You can sign in at: **akara.percipio.com**
Username: kadler or kadler@akara.com
Site Name (for mobile app): **akara**

For further assistance, please contact Skillsoft Support.

Get the app

Get access to Percipio anytime, anywhere!

If the learner completed a skill benchmark and did not achieve 100% proficiency, they also see a reminder to retake it so they can gauge their progress. The reminder to retake a skill benchmark only shows after the specified retake interval has passed.

skillsoft percipio

How much did you learn about Machine Learning this month?

Check your progress >

Recommended just for you

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COURSE
Planning for Skills Needs and Managin...

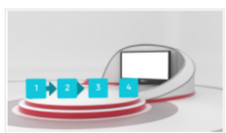
COURSE
Expert Insights on Organizational Cul...

1

COURSE
SOLID & GRASP

Resume learning

COURSE
Building Career Development Programs ...



COURSE
Implementing Transformational HR

1

COURSE
Kanban for Operations: Managing Proje...

2

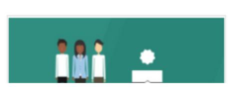
Product Management Skills: Top Rated

BOOK
The Product Manager's Toolkit: Method...

BOOK
The Design of Everyday Things, Revise...

BOOK
The Lean Product Playbook: How to Inn...

Product Management Skills: Most Recent



How do Recommendation emails work?

When enabled, a Recommendation email is automatically sent to learners each week if they are active and accessed Percipio content within the last 30 days.

How do I turn on the Recommendation emails?

Percipio sends the Recommendation emails to all active learners who accessed Percipio content in the last 30 days.

These emails are on by default.

If you've turned these emails off and want to turn them back on, see Turn On Recommendation Emails.

How do I turn off the Recommendation emails?

When you disable the Recommendation emails, email delivery ceases immediately, and no further Recommendation emails are sent.

For procedures, see Turn Off Recommendation Emails

My learners only access Percipio Compliance content, not the rest of the platform. Will they receive the Recommendation emails?

No, these emails are only sent to learners with a license to use the Percipio core platform. They do not go out to Compliance-only learners.

How are the emails triggered?

> **Note:** Recommendation emails are turned on by default.

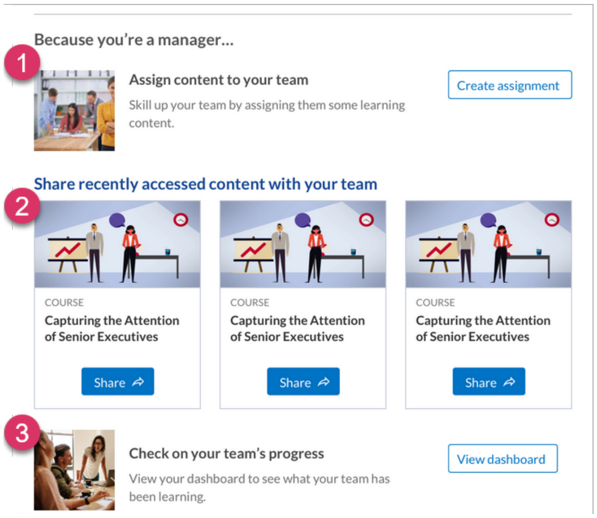
When you enable Recommendation emails:

- Percipio sends a weekly Recommendation email to all active learners who accessed Percipio content within the last 30 days.
- If a learner does not opt out using the **Unsubscribe** link in the email or via the Account Information page, they receive an email each week.
- If a learner does not access content for 30 days, the Recommendation emails stop and, if you have [Re-engagement emails]() enabled, those begin. See [How are the (Re-engagement) emails triggered?]() for more information.

Do managers get different emails than learners?

To help users who have the Percipio role of manager encourage learning in their team, the email contains a special manager section. For every email, Percipio randomly chooses one of the following options to put in this section:

1. Assign content to team (this option only displays if managers have the [custom privilege to assign content]().)
2. Share recently accessed content with team
3. Check on team's progress



Turn On Recommendation Emails

By default, recommendation emails are turned on for your site. If you turned them off, follow these steps to turn them back on for your organization.

To turn on the recommendation emails

1. On the Admin menu, select **SETTINGS** then **Engagement & Notifications**and **Email Campaigns**.
2. In the Recommendation emails section, turn the toggle to **On**.
3. Click **Save**.

   Recommendation emails are immediately sent to those learners who are active and accessed content in the last 30 days.

Turn Off Recommendation Emails

You can opt out of sending recommendation emails to learners by turning off a setting on the Engagement & Notifications page.

> **Note:** Turning off recommendation emails may reduce learner engagement in Percipio. We recommend you keep these emails turned on.

To turn off the recommendation emails

1. On the Admin menu, select **SETTINGS** then **Engagement & Notifications**and **Email Campaigns**.
2. In the Recommendation emails section, turn the toggle to **Off**.
3. Click **Save**. Recommended emails stop and are no longer sent to your learners.

Re-engagement Emails

Re-engagement emails are weekly emails sent to learners who have not accessed Percipio content in 30 or more days, as a reminder to continue learning. The weekly email stops when the user signs back into Percipio, or when the user is inactive for 8 weeks, whichever comes first. Users can opt out of emails at any time.

These emails are a proven, effective way to drive learner engagement by reminding your learners about Percipio's content and resources. Learners with an email address in their profile can receive a series of encouraging, personalized Re-engagement emails during the work week (Monday through Friday) when Re-engagement emails on the Engagement & Notifications page is turned on.

These emails capture learners' attention with personalized subject lines and learning recommendations based on the skills in their profiles. The recommendations include all content types, including custom and linked content. When learners click on a link within the email, they are automatically logged into Percipio with the corresponding page or content item opened. The automatic login only works once per email per user and expires after 60 days. That means, if learners attempt a second click within the email, they are prompted to log in.

You can:

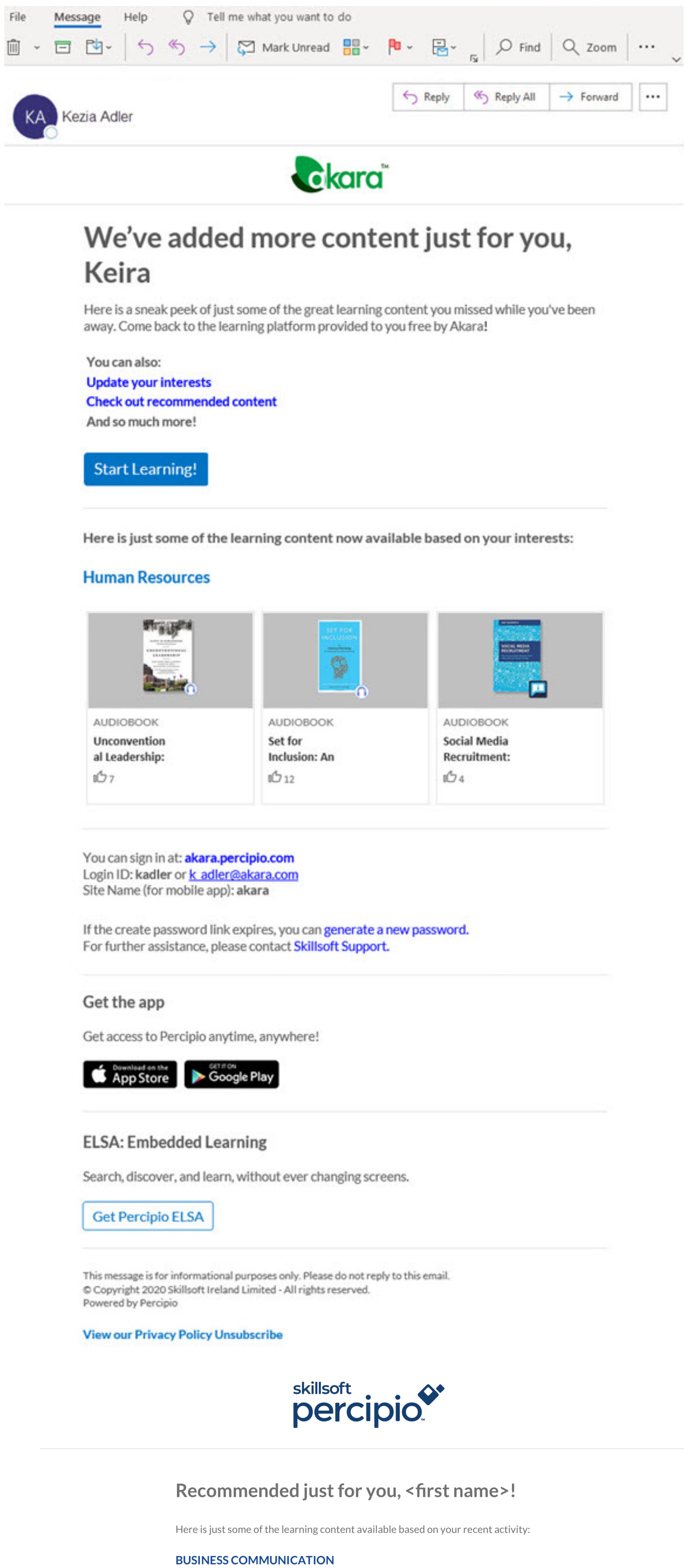
- Specify your organization's name to display in Percipio's emails to ensure your learners know the email is from your company and that the links are safe to click.
- Customize your logo and organization colors contained within the email
- Customize the subject, header, pre-header and introductory text, but not the content of these emails.
- Send only to a target audience.

Note: To send a weekly email to those learners who have accessed content within the last 30 days, see Recommendation Emails.

What does the Re-engagement email look like?

The Re-engagement email includes content suggestions based on the learner's selected skills. The recommendations include all content types, including custom and linked content. It also includes the learner's login ID, a link to the site, and the site name for Mobile App access.

Learners receive one of the three available template formats with customizations that you specify.



File Message Help Tell me what you want to do

Mark Unread Find Zoom

Reply Reply All Forward

KA Kezia Adler

akara™

We've added more content just for you, Keira

Here is a sneak peek of just some of the great learning content you missed while you've been away. Come back to the learning platform provided to you free by Akara!

You can also:
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Check out recommended content
And so much more!

Start Learning!

Here is just some of the learning content now available based on your interests:

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AUDIOBOOK	AUDIOBOOK	AUDIOBOOK
Unconvention al Leadership:	**Set for Inclusion: An**	**Social Media Recruitment:**
7	12	4

You can sign in at: **akara.percipio.com**
Login ID: **kadler** or k_adler@akara.com
Site Name (for mobile app): **akara**

If the create password link expires, you can generate a new password.
For further assistance, please contact Skillsoft Support.

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Search, discover, and learn, without ever changing screens.

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Recommended just for you, <first name>!

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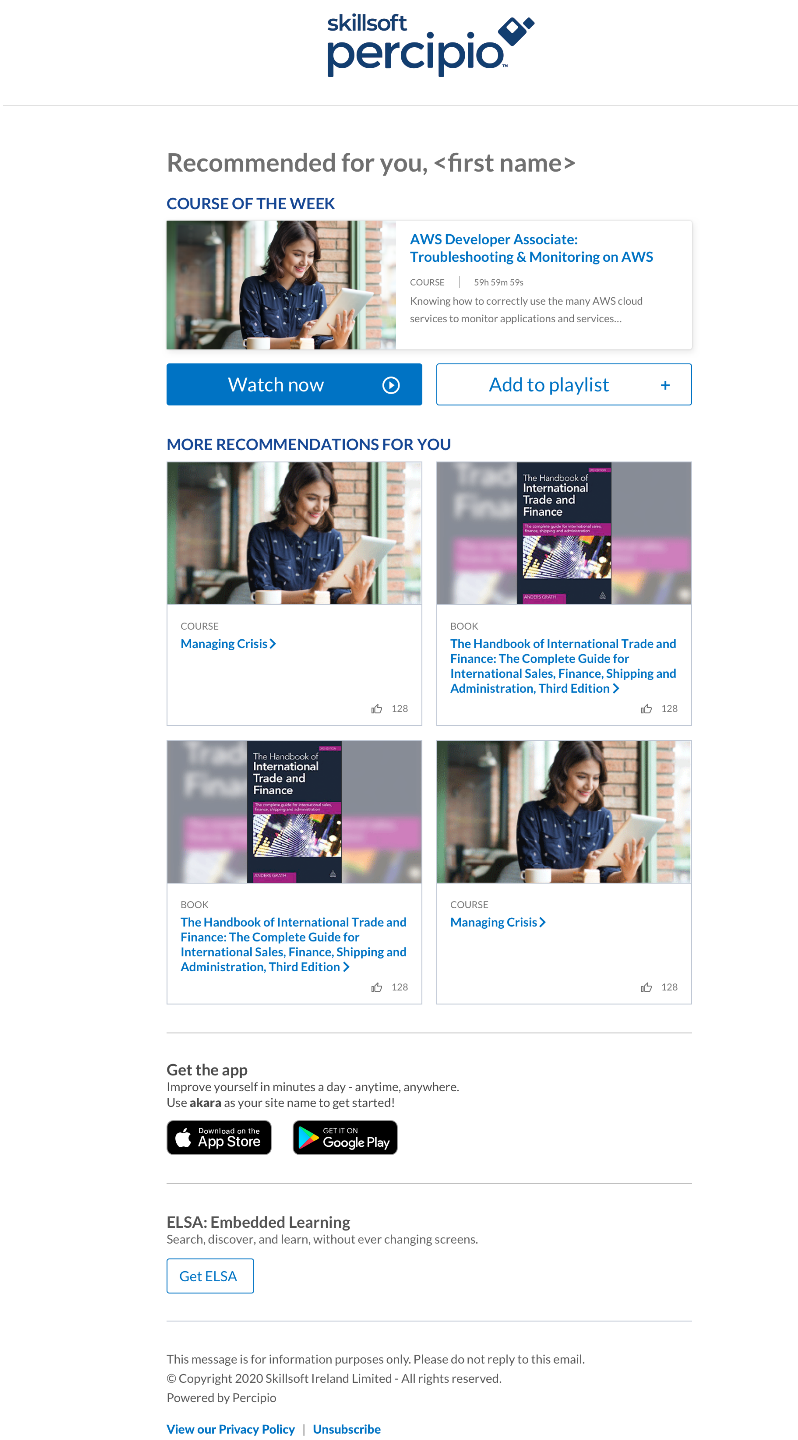
BUSINESS COMMUNICATION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Recommended for you, <first name>

COURSE OF THE WEEK

AWS Developer Associate: Troubleshooting & Monitoring on AWS

COURSE | 59h 59m 59s

Knowing how to correctly use the many AWS cloud services to monitor applications and services...

Watch now

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Managing Crisis >
128

BOOK
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128

BOOK
The Handbook of International Trade and Finance: The Complete Guide for International Sales, Finance, Shipping and Administration, Third Edition >
128

COURSE
Managing Crisis >
128

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ELSA: Embedded Learning
Search, discover, and learn, without ever changing screens.

Get ELSA

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If the learner completed a Skill Benchmark more than 30 days ago, they may also see a reminder to complete it again to gauge their progress.

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Recommended for you, Kristen

CHANNEL OF THE WEEK

IT Hardware Technician

CHANNEL

If you have an affinity for hardware, you've come to the right place. Take the first step at…

Watch now

Save for later +

How much did you learn about Machine Learning this month?

Check your progress >

MORE RECOMMENDATIONS FOR YOU

CHANNEL
Work/Life Balance

CHANNEL
Python

CHANNEL
Managing Across Generations

CHANNEL
Innovation & Creativity

Every day, thousands of people learn something new from Skillsoft Percipio. Access any of these channels to start learning now.

Get more out of your learning recommendations - choose from the latest skills available now!

Why should I use Re-engagement emails?

Early adopters of the Re-engagement emails have observed marked increases of the following:

- overall traffic to their Percipio site,
- number of page views,
- number of sessions, and
- duration of sessions.

How do Re-engagement emails work?

Re-engagement emails are automatically sent to a learner once 30 days pass from the last time they accessed Percipio content. When turned on, any learner that has not engaged with content for more than 30 days automatically receives these emails. Learners receive one email per week, for a total of eight weeks, or until they consume content.

Re-engagement emails stop after any of these:

- Once the learner consumes content again
- If the learner opts out via the **Unsubscribe** link within each email
- If the learner turns off the **Send me an email with new and featured content when I haven't recently visited Percipio** setting from their Account Information page
- When you turn off the feature for all learners via the Email Campaigns page

How do I turn on the Re-engagement emails?

To offer our customers the best return on investment, by default the Re-engagement emails are sent to all learners who have not accessed Percipio content in the last 30 days.

If you've turned these emails off and want to turn them back on, go to the Engagement & Notifications page and turn on the **Allow Percipio to send emails containing new and recommended content to learners who have not recently accessed your site** toggle.

How do I turn off the Re-engagement emails?

On the Email Campaigns page, turn off the **Allow Percipio to send emails containing new and recommended content to learners who have not recently accessed your site** toggle.

My learners only access Percipio Compliance content, not the rest of the platform. Will they receive the Re-engagement emails?

No, these emails are only sent to learners with a license to use the Percipio core platform. They do not go out to Compliance-only learners.

How are the emails triggered?

> **Note:** Re-engagement emails are turned on by default.

When you turn on the **Allow Percipio to send emails containing new and recommended content to learners who have not recently accessed your site** toggle on the Email Campaigns page:

- Percipio sends an initial Re-engagement email to all learners who have not accessed Percipio content within the last 30 days.

- If a learner does not reply by clicking **Unsubscribe** in the email, opting out on their Account Information page, or by signing in to Percipio and accessing content, they receive a reminder email each week until they consume content, or until a total of eight emails are delivered, whichever comes first.

When you turn off the **Allow Percipio to send emails containing new and recommended content to learners who have not recently accessed your site** toggle on the Email Campaigns page:

- Percipio does not send Re-engagement emails to learners.
- If Re-engagement emails have already been sent, the email delivery ceases immediately upon clicking **Save**, and no further Re-engagement emails are sent.

If you want to send a weekly email to learners who have accessed content within the last days, see Recommendation Emails.

How can I monitor my email performance?

For sign-ins

- You can view data about increased sign-ins via the Returning Users percentage on the Overview dashboard's **New vs. returning users** chart.

For traffic increase

- Filter the User Listing report to view last content accesses for a date range beginning the day you enable your Re-engagement emails.

How can I send the email to a targeted audience?

When you turn on the **Allow Percipio to send emails containing new and recommended content to learners who have not recently accessed your site** toggle on the Email Campaigns page, you have the option to send emails to a targeted audience.

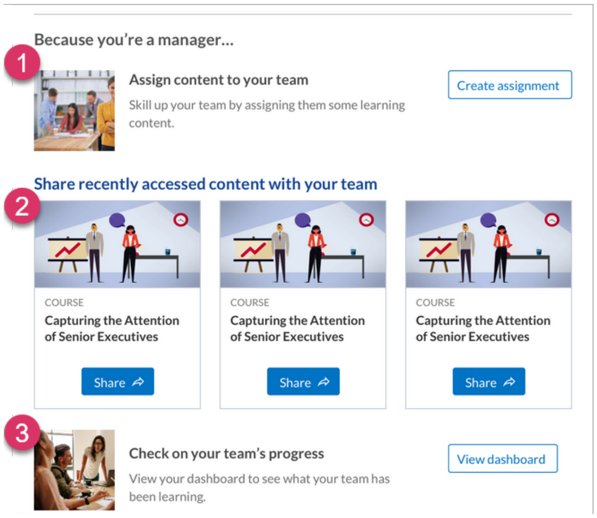
1. Click **Select Audience**. By default all audiences are selected.
2. Unselect all audiences, then find the audience you want to target and select it. Or simply unselect just those audiences who shouldn't get the email.
3. Click **Save audiences**. Emails only go to those in that audience who have not accessed Percipio in the last 30 days.

> **Note:** You can add an audience at any time. Learners in the newly added audience receive all 8 weeks of emails if they remain inactive for the duration and do not opt out.

Do managers get different emails than learners?

To help users who have the Percipio role of manager encourage learning in their team, the email contains a special manager section. For every email, Percipio randomly chooses one of the following options to put in this section:

1. Assign content to team (this option only displays if managers have the custom privilege to assign content.)
2. Share recently accessed content with team
3. Check on team's progress



Turn On Re-engagement Emails

By default, re-engagement emails are turned on for your site. If you turn them off, follow these steps to turn them back on for your organization.

To turn on the re-engagement emails

1. On the Admin menu, select **SETTINGS** then **Engagement & Notifications**and **Email Campaigns**..
2. In the re-engagement emails section, turn on the **Allow Percipio to send emails containing new and recommended content to learners who have not recently accessed your site** toggle.
3. Click **Save**.

   Re-engagement emails are sent immediately to those learners who have not consumed content in the last 30 days, and are automatically sent to any future learners who do not access content for more than 30 days.

Turn Off Re-engagement Emails

You can opt out of sending re-engagement emails to learners by turning off a setting on the Engagement & Notifications page.

> **Note:** Turning off automatic re-engagement emails may reduce learner engagement in Percipio. We recommend you keep these emails turned on.

To turn off the re-engagement emails

1. On the Admin menu, select **SETTINGS** then **Engagement & Notifications**and **Email Campaigns**.
2. In the Re-engagement emails section, turn off the **Allow Percipio to send emails containing new and recommended content to learners who have not recently accessed your site** toggle.
3. Click **Save**. Re-engagement emails stop and are no longer sent to your learners.

Digital Badges for Learner Engagement

Welcome to Digital Badges, where you can motivate and reward your learners. Digital Badges are visual, sharable, and verifiable records of accomplishment enabling learners to socialize their achievements and growth. Digital Badges are issued upon successful completion of Skillsoft course assets delivered through Percipio.

We recommend that **Compliance Only** customers disable this feature, as Compliance content is not eligible for Digital Badges.

Safelisting

Spam filters may block your learners from emailing their earned Digital Badges to recipients. We recommend your IT department(s) safelist the domain so the learner's emails are received. For more information, see the Digital Badges section of the system requirements.

Frequently asked questions

Why should my organization enable Digital Badges?

By enabling Digital Badges for your learners:

- you can reduce administrative efforts,
- increase adoption,
- drive learner engagement throughout your organization, and
- encourage continuous learning to fill in skill gaps and encourage career growth.

How do I enable Digital Badges?

The settings are available on the Engagement & Notifications page.

Can I disable Digital Badges for a specific audience?

No. Digital Badges are a site-level setting and cannot be disabled for a specific audience.

How do Digital Badges in Percipio work?

Digital Badges are provided by Accredible, a third-party provider and new sub-processor for Skillsoft, and is seamlessly integrated with Percipio.

Accredible provides the same level of protection for your organization's personal data as Skillsoft does, thereby meeting or exceeding its obligations as a processor of personal data under the GDPR. Accredible processes the minimum amount of personal data for the purpose of issuing a learner's Digital Badge, and neither process, nor have access to, the personal data of any individual beyond their first name, last name, and User ID/email address.

Why should my organization enable the "Badge Earned" emails?

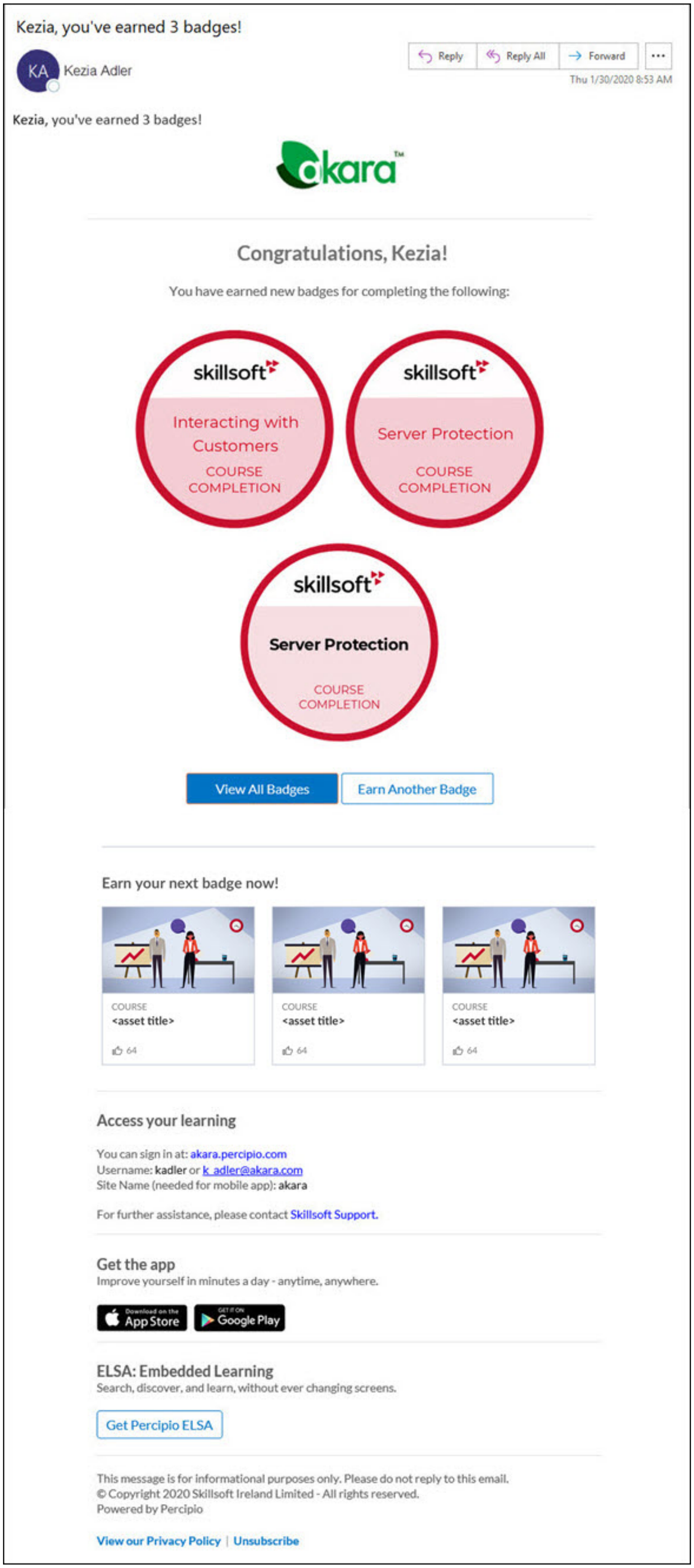
When you enable these emails:

- Any learners who earned a badge receive up to 2 emails per week (Mondays and Thursdays) with their Digital Badge information and recommendations about content where more badges can be earned.
- Site Admins receive a single email on the first Monday of each month with the total number of Digital Badges earned within their organization.

How do I enable the "Badge Earned" emails?

Turn on the **Enable "Badge Earned" emails** setting to on the Engagement & Notifications page. This enables both the up to twice weekly learner emails, and the once-monthly admin email.

Learner email:



Kezia, you've earned 3 badges!

KA Kezia Adler

Reply | Reply All | Forward | ...

Thu 1/30/2020 8:53 AM

Kezia, you've earned 3 badges!

akara™

Congratulations, Kezia!

You have earned new badges for completing the following:

skillsoft
Interacting with Customers
COURSE COMPLETION

skillsoft
Server Protection
COURSE COMPLETION

skillsoft
Server Protection
COURSE COMPLETION

View All Badges | Earn Another Badge

Earn your next badge now!

COURSE <asset title> 64	COURSE <asset title> 64	COURSE <asset title> 64

Access your learning

You can sign in at: akara.percipio.com
Username: kadler or k_adler@akara.com
Site Name (needed for mobile app): akara

For further assistance, please contact Skillsoft Support.

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ELSA: Embedded Learning

Search, discover, and learn, without ever changing screens.

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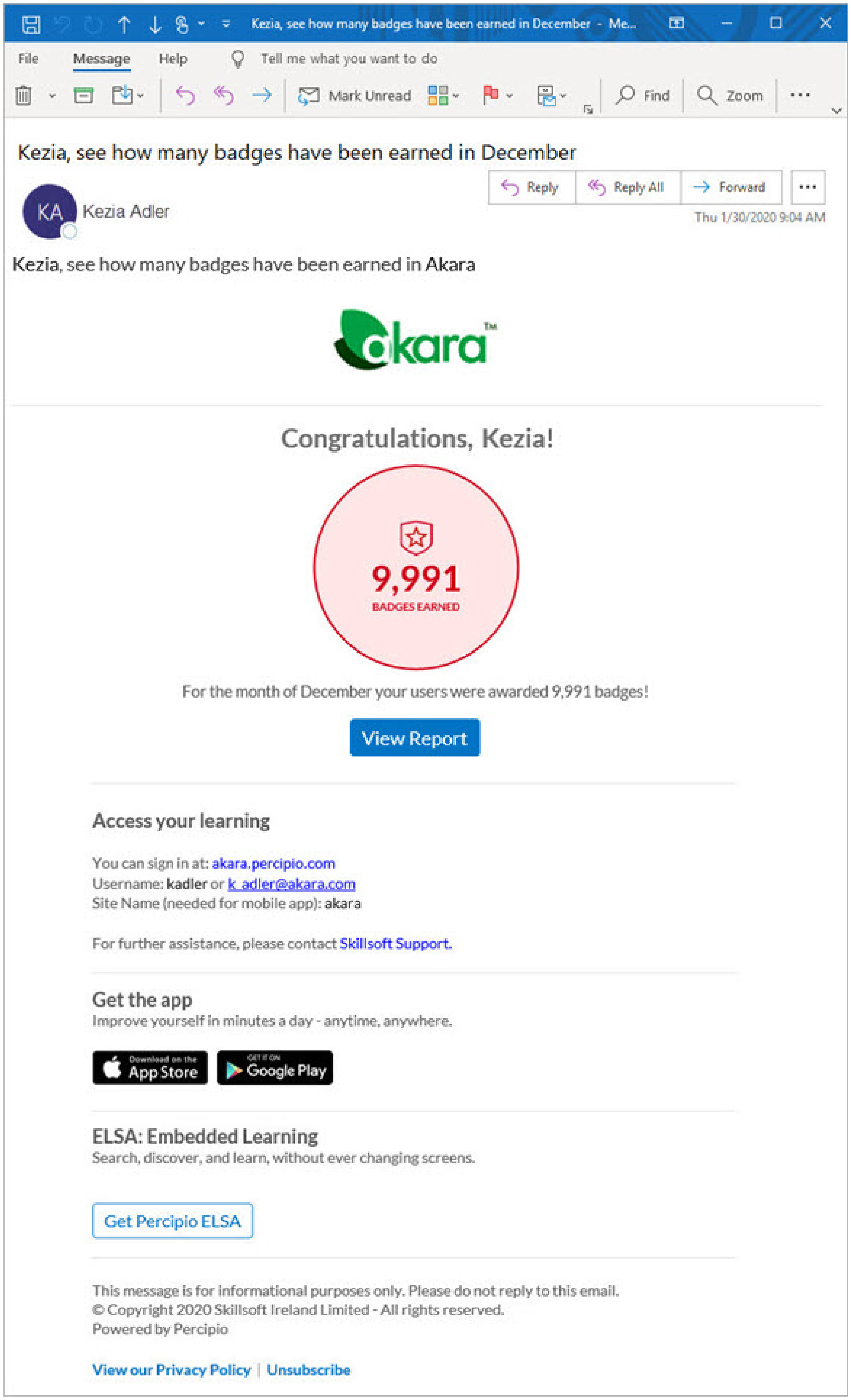
Admin email:


Kezia, see how many badges have been earned in December - Me...
File
Message
Help
Tell me what you want to do
Mark Unread
Find
Zoom
Kezia, see how many badges have been earned in December
KA
Kezia Adler
Reply
Reply All
Forward
Thu 1/30/2020 9:04 AM
Kezia, see how many badges have been earned in Akara
akara
Congratulations, Kezia!
9,991
BADGES EARNED
For the month of December your users were awarded 9,991 badges!
View Report
Access your learning
You can sign in at: akara.percipio.com
Username: kadler or k_adler@akara.com
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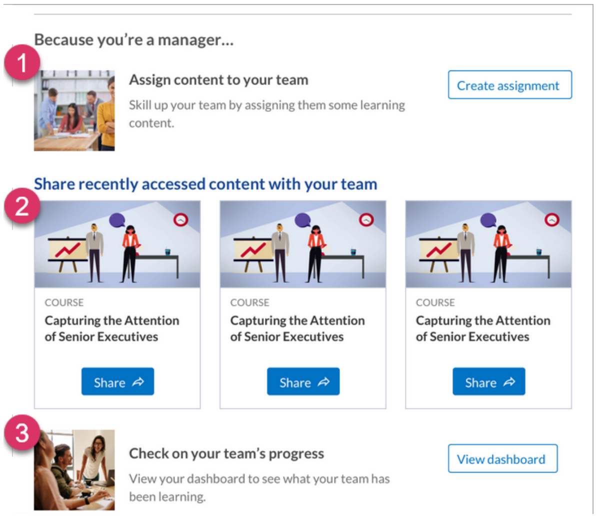
Do managers get different emails than learners?

To help users who have the Percipio role of manager encourage learning in their team, the email contains a special manager section. For every email, Percipio randomly chooses one of the following options to put in this section:

1. Assign content to team (this option only displays if managers have the custom privilege to assign content.)
2. Share recently accessed content with team
3. Check on team's progress



Can I customize Digital Badges?

Yes. See Custom Digital Badges for details.

Turn On Digital Badges

By default, Digital Badges are turned on for your site. If you turn them off, follow these steps to turn them back on for your organization.

To turn on Digital Badges

1. On the Admin menu, select **SETTINGS** then **Engagement & Notifications**and **Engagement**.
2. In the Digital Badges section, turn on the **Enable Digital Badges** toggle for each of courses, tracks or journeys.
3. Click **Save**.

   Digital Badges are immediately available to your learners.

Turn Off Digital Badges

You can opt out of Digital Badges by turning off a setting on the Engagement & Notifications page.

> **Note:** Prior to disabling Digital Badges, we recommend you inform your learners so that they can bookmark their Skillsoft Digital Badge page for continued access to any Digital Badges they may have earned.

To turn off Digital Badges

1. On the Admin menu, select **SETTINGS** then **Engagement & Notifications**and **Engagement**.
2. In the Digital Badges section, turn off the **Enable Digital Badges** toggles for each, courses, tracks, or journeys.
3. Click **Save**.

   The Digital Badges link under **My Profile** no longer displays to learners, and courses that are Badge-eligible no longer display the **Earn a Badge!** button.

Retiring and Recently Added Content Emails

In conjunction with the Skillsoft Content Status report, Percipio sends a monthly email to Percipio user roles that can access this report. This email alerts you that assets in your collection are either being retired or added, and provides you a link to view the report. The report shows the specific assets impacted so that you can update assignments, channels, journeys and content promotions as necessary.

What does the email look like?

The retiring and recently added content email indicates that Skillsoft content is either retiring soon, being added, or both. It also provides a link to view the Skillsoft Content Status report and information so you can sign into your Percipio site.

skillsoft percipio

Some of your content is retiring soon

Hi Kristen,

We work hard to keep our content fresh and up-to-date in Skillsoft Percipio and/or your LMS. As a result, we will be retiring some of your learning content soon. Don't worry, your learners will not experience any disruption, even if you take no action. As a best practice, we recommend you review the retiring content, and make any necessary adjustments, such as removing it from a custom channel or promotion.

View Retiring Content

Looking for retired or retiring books? Click here

You can sign in at: **akara.percipio.com**
Login ID: kristen.webster or kristen.webster@akara.com
Site Name (for mobile app): **akara**

For further assistance, please contact Skillsoft Support.

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How are the emails triggered?

If your organization is using content that is due to expire within the next 90 days, Percipio automatically sends the email to Percipio user roles that can access the Content Status report on the first Monday of each month.

How do I turn on the emails?

These emails are on by default for your organization. The toggle is set to **On** from the Email Campaigns page.

How do I turn off the emails?

If you want to disable the emails for your entire organization, set the toggle to **Off** from the Email Campaigns page.

As an individual, you can choose to unsubscribe from the emails in your personal Account Information or in Mobile App Settings.

Brand your Emails

You can brand your emails to ensure your learners know they are coming from your organization and safe to open.

To brand your emails

1. **Change the logo, background images, and colors to match your organization's brand.**

    a. On the Admin menu, click **SETTINGS > Site Branding**.
    The Site Branding page displays.

    b. Edit your branding settings.

    c. Select **Activate Branding**.

d. Select **Save**.

> **Note:** When you make changes to the Site Branding page, the changes apply to the appearance of your Percipio site, Percipio mobile app, Skillsoft completion certificates, and any Percipio-generated communications.

2. **Set the organization name to display in all Percipio-generated communications.**

    a. On the Admin menu, select **SETTINGS** then **Engagement & Notifications** and **Email Settings**. The Email Settings page displays.

    b. In the **Organization Name** section, enter your organization's name that you want to display in emails.

    c. Select **Save organization name**.

3. **Customize how the "From" line displays in all Percipio-generated communications.**

    a. On the Admin menu, select **SETTINGS** then **Engagement & Notifications** and **Email Settings**. The Email Settings page displays.

    b. In the **Organization Name** section, enter your organization's name or the name you want to display to user's receiving email notifications from Percipio. For example: **My Company**.

c. Next, select **Use the Organization Name to personalize emails coming from Percipio**. When learners receive an email, **My Company <no-reply@percipio.com>** displays in the From line.

d. Select **Save organization name**.

Retiring and Recently Added Content Emails

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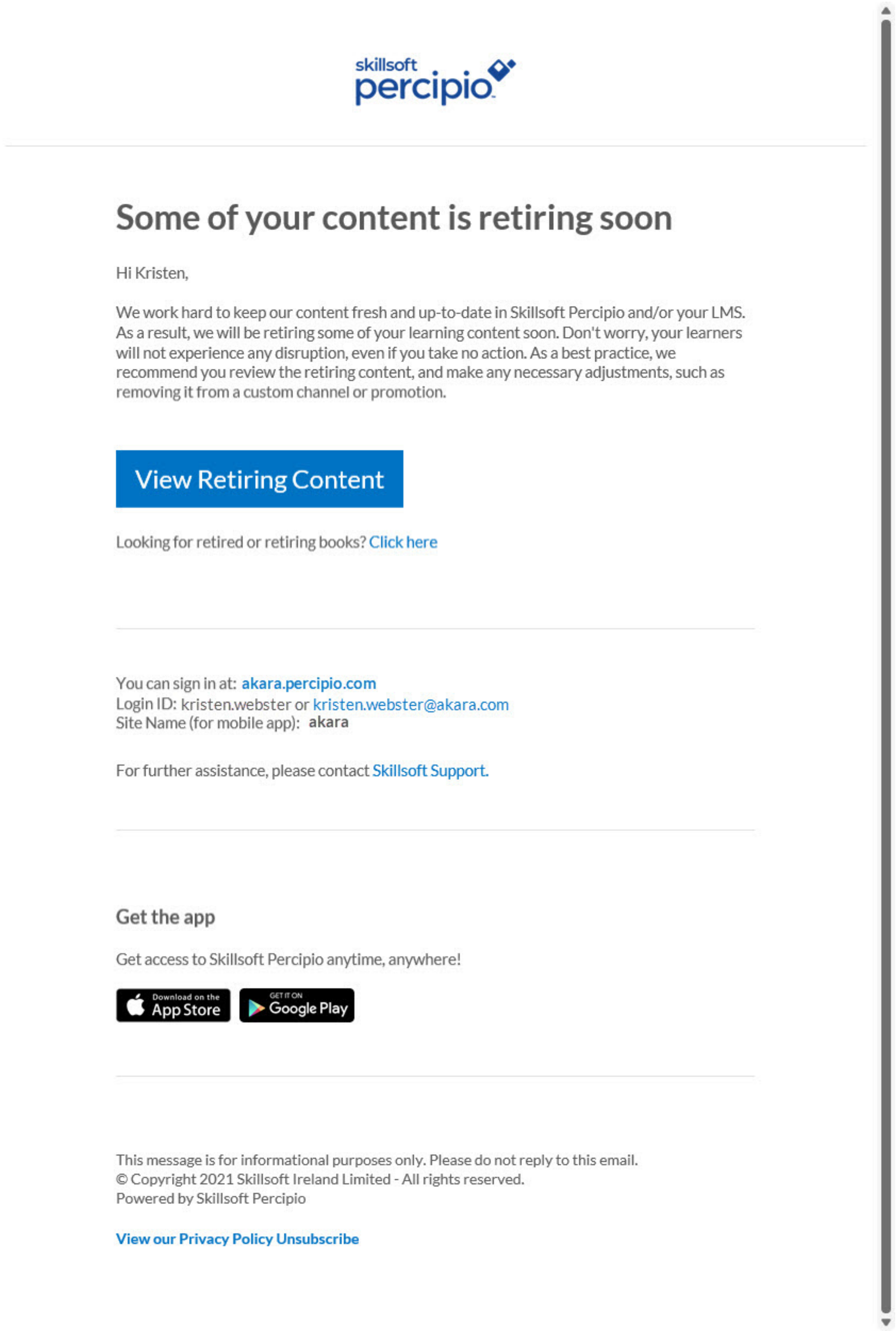

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How do I turn off the emails?

If you want to disable the emails for your entire organization, set the toggle to **Off** from the Email Campaigns page.

As an individual, you can choose to unsubscribe from the emails in your personal Account Information or in Mobile App Settings.

Library Management

You can manage your custom content and custom journeys inside of your library using the **Custom Areas & Subjects** menu in Percipio Admin. You must have Site Admin or Content Curator privileges to access these pages. Prior to managing your library, review the Library Management Best Practices.

> **Note:** Changes made to your library display in both Percipio for the Web and the Percipio mobile app.

Customize your library via custom areas, custom subjects, and custom channels.

Frequently asked questions

A Skillsoft channel in my library isn't relevant to my learners. Can I hide the entire Skillsoft channel from them?

Yes, you can hide an entire Skillsoft channel from your learners. When you hide a channel, it is removed from the Library link at the top of the page, and content within the channel is only accessible via search. Content continues to automatically update in hidden Skillsoft channels.

When you hide a channel, it is hidden from the entire organization.

For more information or procedures, see Hide and Show Channels and Channel Views.

I want to hide a custom channel from my learners. Can I do that?

Yes, you can hide an custom channel from your learners. When you hide a channel, it is removed from the Library link at the top of the page, and content within the channel is only accessible via search.

When you hide a channel, it is hidden from the entire organization. For more information or procedures, see Hide and Show Channels and Channel Views.

You can also choose to enable a custom channel to just a specific audience thereby hiding it from other users in Percipio. See editing custom channel for additional information.

Can I hide a specific language view of a multi-view channel from my learners?

You **cannot** hide a single language view from multi-view Skillsoft channels; you must hide the entire Skillsoft channel.

You **can** hide a single language view from multi-view custom channels.

For more information or procedures, see **To hide a custom channel view** in Hide and Show Channels and Channel Views.

Can I hide Skillsoft or custom courses from my learners?

No, you cannot hide courses in Percipio. If a learner is entitled to a course, it is available to her and is accessible via search.

Can I hide custom areas and subjects in my library?

No, you can only remove the subjects and areas by deleting them. To remove a subject from your library, you must edit the custom channel's Area/Subject association.

Can I hide custom journeys?

No, but you can make custom journeys available to only a select audience during the creation or editing process. See Creating a custom journey for details.

Area and Subject Best Practices

With Percipio, you can customize your library by adding a custom menu category and custom areas and subjects. Prior to creating these, Skillsoft recommends you follow some best practices.

Plan

- When planning a custom library area and subject, consider the most intuitive user path. Use labels that are familiar to your learners, and that clearly describe the channels they will find within each subject.
- Decide whether to add the custom area to the standard menu category of Skill Areas or to a custom menu category located at the top of the Library. You can label the custom menu category anything you want. You can also localize the custom menu category name.

Create

- Use custom areas sparingly, as creating too many areas in the Library drop-down adds a scroll bar to the list. This could negatively impact user experience.
- Instead of creating a large number of custom areas, create multiple custom subjects under the same area.
- Images are recommended (but not required) for custom areas and subjects. If you do not have a custom image, use one from a stock area or subject.

Display

- Library areas and subjects display in alphabetical order. Using special characters (such as spaces, numbers, and asterisks) push custom areas to the top of the Library menu, and custom subjects to the top of their areas.
- You can choose to have your area display within the standard menu category of Skill Areas or in a custom menu category located at the top of the Library. You can label the custom menu category anything you want.
- If you do not add a custom area to your custom menu category, the custom menu category does not display.
- Custom areas and subjects do not display in the library unless they contain published channels or journeys that also contain published content.

Skillsoft Library Maintenance for Percipio

Skillsoft continually develops and releases new content to meet your evolving needs. We also periodically update the subject matter of existing content and make changes for accuracy. Occasionally we choose to retire content that is outdated, no longer relevant, or is replaced by newer content.

Percipio streamlines the process of including these content updates in your organization's library. The following sections explain how Skillsoft library maintenance works for you.

New content releases

New content, such as courses, books, videos, and practice labs, are released on Percipio on an ongoing basis. New releases can be found in the All Content by Collection report, which is available to administrators.

Updates to existing content

Periodically, minor changes to content are required. This typically happens when content needs to reflect new technology features added since initial publication. We often choose to update existing content, rather than retire old content and release a new version of similar content. This allows us to use the same course code and UUID, seamlessly delivering updated content to your organization.

Content retirement

We periodically retire content that is outdated. Content becomes outdated for two reasons. First, it may cover a subject that is no longer relevant, such as a course covering an application that is no longer made or supported. Second, a content topic may still be relevant, but the way in which we cover it may need updates.

In both cases, we choose to remove the content entirely from the library, which prevents learners from using that content in the future. In the first case, we may or may not have replacement content available. In the second case, we release replacement content.

Similarly, books and audiobooks are retired due to relevancy of the subject, overall usage of the books, and changing relationships we have with publishers.

Frequently asked questions

What do I need to do to get new content?

Content is added automatically. There is nothing you need to do in order to update your library with new content.

What do I need to do to get updates to existing content?

Like new content releases, these updates require no action on your part.

What happens when content doesn’t have a replacement?

When content is retired, it is removed. Your organization cannot access it from the Percipio library, in assignments or promotions, or from custom channels you may have created.

When accessing a link to content that has been removed, learners see an on-screen notification message.

If one or more assets within an assignment is retired, and the assignment has active content in it, the retired content no longer counts towards the assignment completion criteria. If the order is forced, the learner is automatically able to access the next item in the list after the retired content. See Replace retired content.

All learner activity associated with the retired content remains on the Activity page.

What happens when content has a replacement?

Content replacements are listed in the Library Maintenance Report in the Skillsoft Client Community. The replacement content is published just like other new content and your library includes it automatically.

How do I know what content is retiring?

- The Skillsoft Content Status report lists retiring courses, channels, and linked content.
- A monthly Retiring Content email is sent to administrators. It alerts you about retiring assets due to expire and contains a link to view the Skillsoft Content Status report.

How often are courses retired?

Course retirements occur on the last day of each of the Skillsoft fiscal quarters: January 31, April 30, July 31, and October 31. We schedule content retirements with a minimum of 90 days advance notice.

How often are books retired?

Book retirements are generally scheduled with 30 days advance notice.

Areas

An area is a broad grouping of content within the Percipio library that contains sub-groups called subjects. When you create a custom area, you choose where in the library it displays. You can choose either the standard menu category, Skill Areas, or a custom menu category, that you define yourself.

Areas are listed alphabetically in the library either under a custom menu category or under the standard menu category, Skill Areas.

See Area and Subject Best Practices prior to creating your custom areas.

Custom Menu Category

You can group your custom areas into a category labeled for your company. By default, the custom menu category is equivalent to the Organization Name. To edit the label of a custom menu category in the Library:

1. From the **Content** menu, select **Areas and Subjects**.
2. At the top next to custom menu category, select **Edit label**.
3. Add the title to display in the Library. You can provide localized versions by selecting **Language** and adding a new title in that language.
4. Select **Publish** when you are done. This does not change the organization name, only the display in the Library.

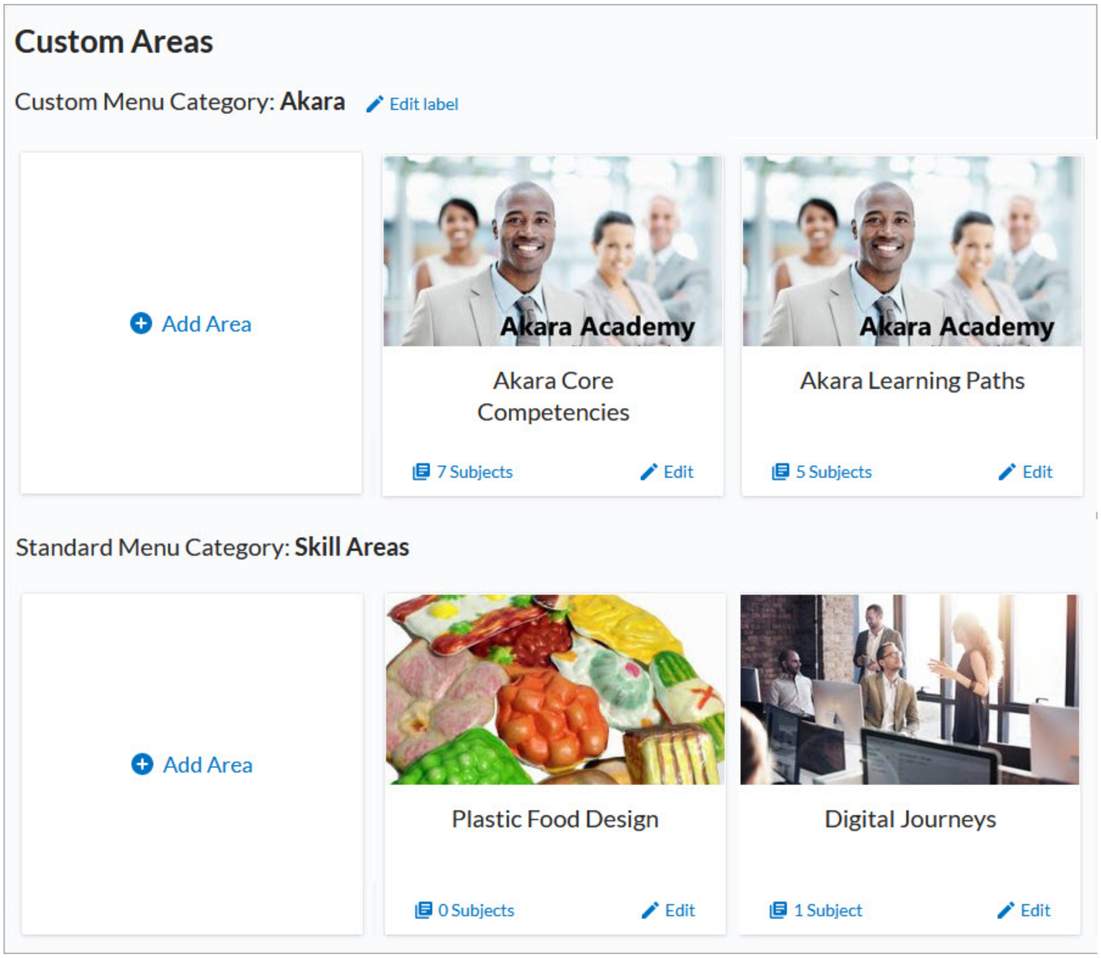
Create a New Custom Area

Prior to working with custom areas and subjects, see Area and Subject Best Practices.

When you create a custom area, you choose where in the library it displays. You can choose either the standard menu category, Skill Areas, or a custom menu category, that you define yourself.

To create a new custom area in your library

1. On the Admin menu, select **CONTENT** > **Custom Areas & Subjects**. The Custom Areas page displays. The page is broken into two sections, one for the custom menu category you defined, and one for the standard menu category, Skill Areas.



2. Select **+ Add Area** from either category section. The Add Custom Area page displays.

3. Enter an **Area title**. This displays in the library to your users.

4. Select the **Menu Category**. The menu category selection defaults to the name of the section where you selected **Add Area**.

   - **Skill Areas**: if chosen, your custom area displays alphabetically within the standard menu category, Skill Areas of the library list.

   - **Organization name**: if chosen, your custom area displays alphabetically in a new section in the library listed above the Skill Areas section. If you do not see your organization name in the list, you can add it from Settings, then Engagement and Notifications. If the display name of your organization is not what you want displayed in the Library menu, you can edit it.

5. Review the default setting:**Show activity data related to this area and its related subjects and channels in the Skills Activity Dashboard**

   - If selected, activity related to the custom area and its subjects and channels appears in the Skills Activity Dashboard.

   - If unselected, activity related tot he custom area and its subjects and channels does not appear in the Skills Activity Dashboard.

6. Choose an **image**.

   - The image displays on the Browse library page.

   - Images must be uploaded to Percipio in a 16x9 aspect ratio.

   - The recommended size for the image is 1920 x 1080px, with a file size of no more than 300k.

   - A .jpg format is preferred, but you can upload .jpg, .png, and .gif files.

7. Optionally, if you wish to include this area in other language libraries, select one language at a time from the **Language** drop down, specify the **title**, **menu category**, and **image** as you want it to display in the selected language. Continue in this manner until all languages have been specified. You cannot specify additional languages until you specify English.
8. Select **Publish**.

   The new custom area does not display in the library until you create a custom subject for it.

Edit a Custom Area

Prior to working with custom areas and subjects, see Area and Subject Best Practices.

To edit a custom area in your library

1. From the Admin menu, click **CONTENT** > **Custom Areas & Subjects**. The Custom Areas page displays.
2. Locate the custom area you wish to edit.
3. Click **Edit**. The Edit Area page displays.
4. You can:
   a. Modify the **title**.
   b. Choose a new **image**.
      - The image displays on the Browse library page.
      - Images must be uploaded to Percipio in a 16x9 aspect ratio.
      - The recommended size for the image is 1920 x 1080px, with a file size of no more than 300k.
      - A .jpg format is preferred, but you can upload .jpg, .png, and .gif files.

5. Select any **Language**you wish to include, and enter the **title** and **image** as you want it to display in the selected language.

6. Click **Publish**.

   The custom area updates immediately in your Percipio library.

Delete a Custom Area

Prior to working with custom areas and subjects, see Area and Subject Best Practices.

To delete a custom area from your library

1. Ensure you delete custom subjects from the custom area.

2. From the Admin menu, click **CONTENT** > **Custom Areas & Subjects**. The Custom Areas page displays.

3. Locate the custom area you wish to delete.

4. Click **Edit**. The Edit Area page displays.

5. At the top of the page, click **Delete this area**.

6. When the confirmation message displays, click **Delete**.

   Your library updates with the area removed.

Subjects

In the Percipio library, a subject is a sub-category of an area. You can create a custom subject within a custom area of your library.

Custom subjects display inside of custom areas, which your learners see in the library drop-down. You can also include custom subjects in your learner's skill selections during the creation or modification of a custom subject. See Create a New Custom Subject and Edit a Custom Subject for procedures.

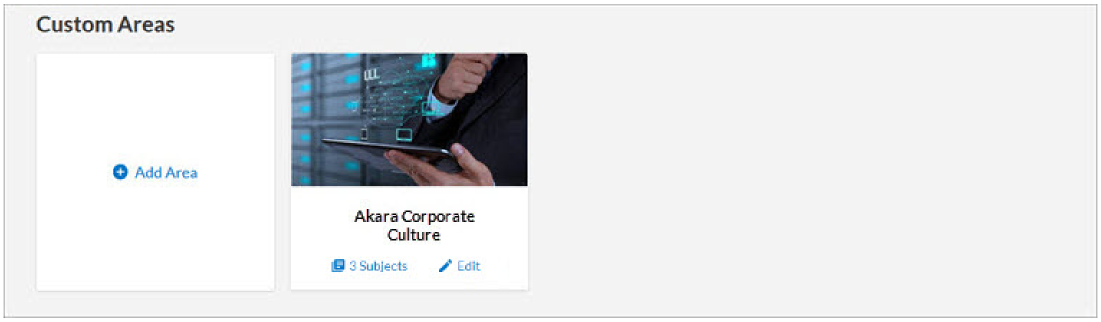
See Area and Subject Best Practices prior to creating your custom subjects.

Create a New Custom Subject

Prior to working with custom areas and subjects, see Area and Subject Best Practices.

To create a new custom subject

1. From the Admin menu, click **CONTENT** > **Custom Areas & Subjects**. The Custom Areas page displays.



2. Locate the area to which you want to add a new custom subject.
3. Click within the area card or select Subjects within the card. The area page displays.
4. Click **+ Add Subject**. The Add Subject page displays.
5. Enter a **Subject title**.
6. Optionally, select **Learners can select this subject as a skill and receive recommendations** if you want this subject presented to learners when they select their skills.
7. Choose an **image**.
   - The image displays on the Browse library page.
   - Images must be uploaded to Percipio in a 16x9 aspect ratio.
   - The recommended size for the image is 1920 x 1080px, with a file size of no more than 300k.

- A .jpg format is preferred, but you can upload .jpg, .png, and .gif files.

8. Optionally, if you wish to include this subject in other language libraries, select one language at a time from the **Language** drop down, specify the **Subject title** and **image** as you want it to display in the selected language. Continue in this manner until all languages have been specified. You cannot specify additional languages until you specify English.
9. If you know which channels and journeys you want to show under this subject, select **Add channels and journeys**. You can search for and add both custom and Skillsoft channels and journeys.

   If you do not know which channels or journeys you want to add or have not yet created them, you can skip to step 10 and publish your Subject.
10. Select **Publish**.

    The new custom subject does not display in the library until you add channels or journeys that contain published content. For more information on content visibility, see Content Visibility Rules.

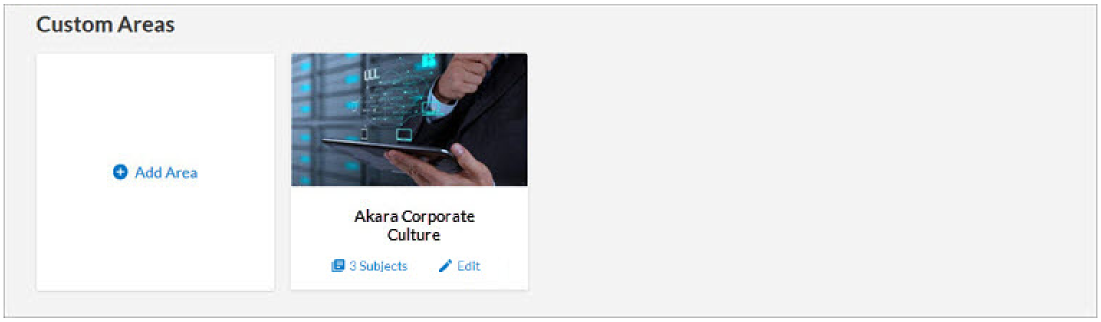
> **Note:** You can also add custom channels to your custom subject by following procedures in Create a New Custom Channel, and ensure you select the custom area and subject from the **Subject** drop-down list.

Edit a Custom Subject

Prior to working with custom areas and subjects, see Area and Subject Best Practices.

To edit a custom subject

1. From the Admin menu, click **CONTENT** > **Custom Areas & Subjects**. The Custom Areas page displays.



2. Locate the area that contains the custom subject you want to edit.
3. Select the area card or the number of Subjects link. The area page displays.
4. Locate the subject you want to edit and select **Edit**. The Edit Subject page displays.
5. You can edit any of the following:
   - Subject title
   - Image
   - The **Learners can select this subject as a skill and receive recommendations** selection (Select this if you want this subject presented to learners when they select their skills.)
   - Custom or Skillsoft channels and journeys contained in the subject
   - Language selections and titles
6. Select **Publish** to save your changes.

Delete a Custom Subject

Prior to working with custom areas and subjects, see [Area and Subject Best Practices](#).

You must remove all custom channels from the subject prior to deletion.

To delete a custom subject from a custom area

1. **Remove all custom channels from the subject.**

    a. Determine which channels are in the subject you wish to delete by locating the area and subject in the library, and viewing the subject's library page.

    b. From the Admin menu, click **CONTENT** > **Custom Channels**. The Custom Channels list displays.

    c. Click the title of the channel you wish to remove from the custom subject. The Channel page displays.

    d. In the channel header, click **Edit**. The Edit Channel page displays.

    e. In the Channel details section, click the X on the custom area/subject association.

    f. Click **Save and add content**. The Channel page displays.

    g. Click **Publish**.

    h. When the confirmation message displays, click **Publish** . The channel is immediately removed from the custom subject.

    i. Repeat for all channels in the custom subject you want to delete.

2. From the Admin menu, click **CONTENT** > **Custom Areas & Subjects**. The Custom Areas page displays.
3. Locate and select the custom area that contains the custom subject you wish to delete.
4. Locate the custom subject you wish to delete, then click **Edit**. The custom subject's page displays.

5. At the top of the page, click **Delete this subject**.

6. When the confirmation message displays, click **Delete**.

   Your subject is immediately deleted from the custom area.

Custom Channels

You can create custom channels specifically for your organization. You can create a new (blank) custom channel, copy an existing custom channel, or copy an existing Skillsoft channel. You can include a selection of custom content, Skillsoft content, or a combination of both.

Prior to creating custom channels, Skillsoft recommends you review theCustom Content Best Practices documentation.

Automatic content updates

- Skillsoft channels automatically receive new Skillsoft content offerings as those offerings become available.
- To receive automatic updates to a copied channel, you must not add or remove any content from the channel. You can change the title, description, and image without impacting automatic content updates to the copied channel.
- If you copy a Skillsoft channel and add/remove content, your custom channel does not automatically receive new Skillsoft content offerings.

Channel creation

- Check that existing channels do not already cover the topics you want to see in your custom channels.
- Do not create large amounts of custom channels.
- Ensure you have complete descriptions written for each channel.

Content selection

Ensure you know what content is already available on your site.

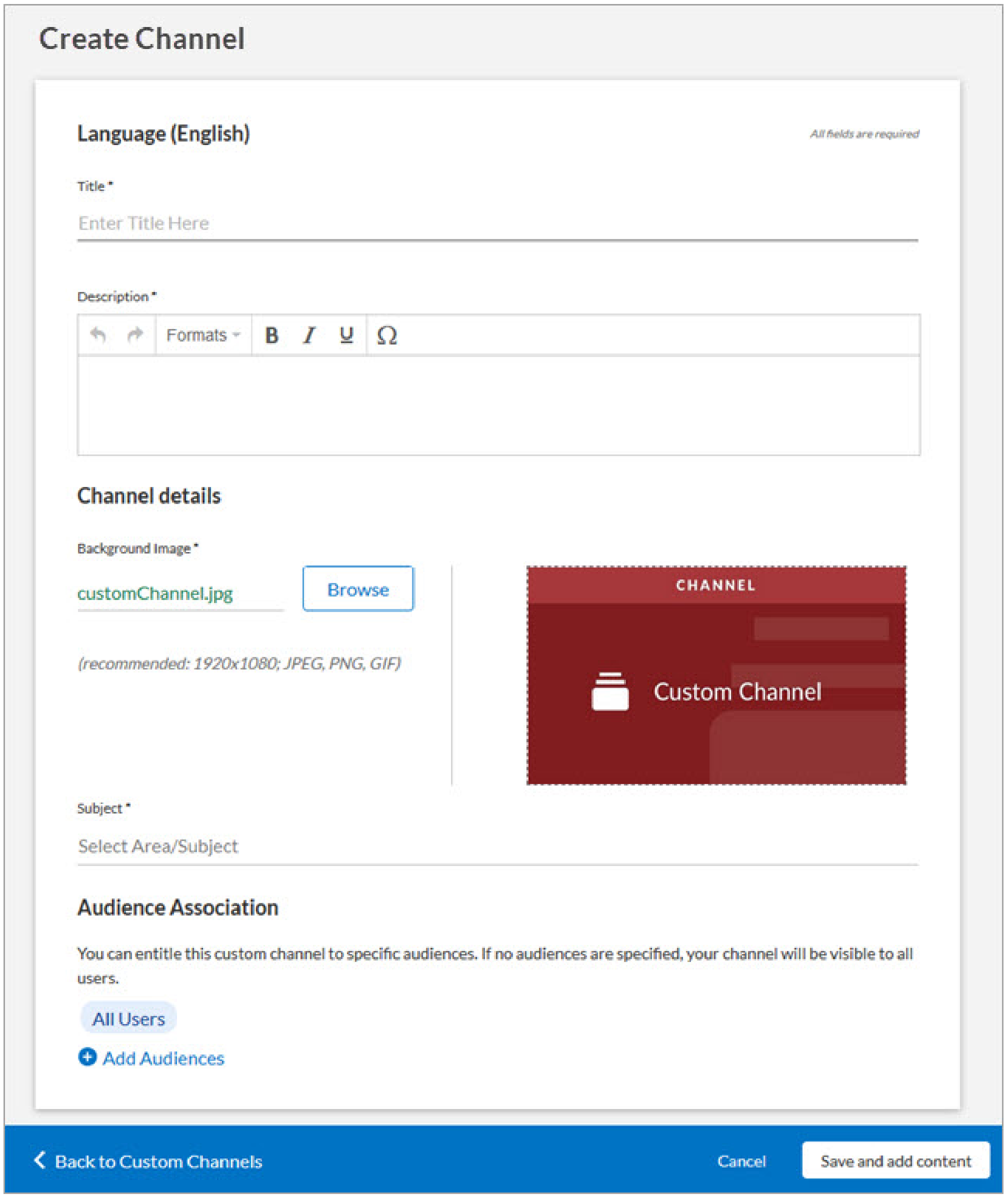
- Locate both Skillsoft and custom content using search, and by browsing your existing channels.
- Review your custom-linked content items.
- To identify courses in a local language, see Find a course in a different language or use the All content listing by collection or All content listing by title reports and filter on the **English Equivalent Title** column for the English title you are using.

Create a New Custom Channel

You can create new, customized channels in all supported languages. You can include a selection of custom content, Skillsoft content, or a combination of both.

To create a new custom channel

1. From the Admin menu, select **CONTENT** > **Custom Channels**. The Custom Channels page displays.
2. Click **Add Custom Channel**. The Create Channel page displays.



Note: You can create new custom channels in all supported languages, but you must first create the channel in English before creating the additional languages.

3. Enter a unique **Title** for the channel.

4. > **Note:** Titles are required to be unique. If you have already used a title in another channel, the new title here needs to be different.

5. Enter a **Description**. To ensure consistent display to the learner, formatting done to text in the description box may be lost when shown in the Percipio learner interface.

   > **Note:** The more text you enter into the description, the easier it is for your users to find the channel in their search results.

6. Choose a background image.
   - The background image displays at the top of the channel.
   - Channel images must be uploaded to Percipio in a 16x9 aspect ratio.
   - The recommended size for the image is 1920 x 1080px with a file size of no more than 300k.
7. Enter a channel source, to inform your learners about who created the channel, or where the content in the channel originated. The source defaults to your organization name.
8. Select your area and subject (for library placement) from the **Subject** drop-down list. You can select either Skillsoft or custom areas and subjects.
9. Click **Save and add content**. The channel page displays.
10. **Add content to the channel.**

Modifications to the content selections affect only the selected language view.

a. In the channel header, select a language from the drop-down menu.

b. On the channel page, add new content:

   - Click **Add content from library**: Search the Skillsoft library for existing content.

     i. Enter search terms and click .

        Note: You can only search content in the language selected in the channel header. If no language options are available to you on the header, search results are in English.

     ii. Optionally, use the filters to refine your search results.

     iii. Click next to the content to add it to the channel.

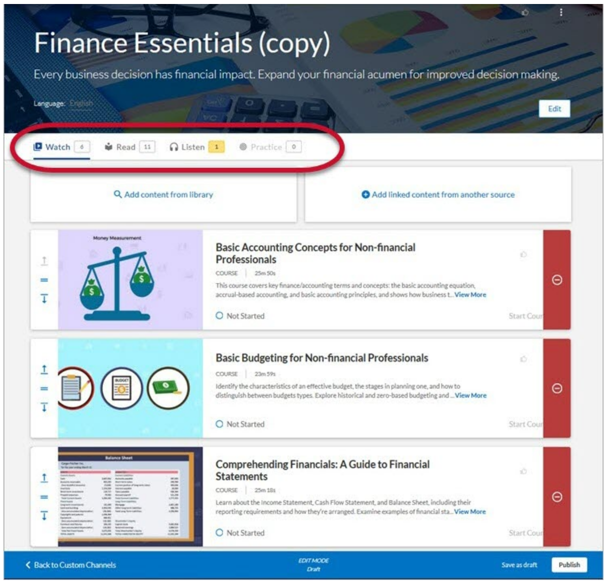
        You can include a selection of custom content, Skillsoft content, or a combination of both.If using Skillsoft content, ensure your users can view and access it by including them in audiences that are associated with the content license pools.

- Click **Add linked content from another source**: The Add Linked Content page displays, and you can create a new external link for your channel. Once created, Percipio returns you to the channel page, with the new external link added to your channel. See Create an External Link for steps.

c. If you added content but want to remove it before saving, click ✓.

d. Click **Done**.

The number of assets in each modality updates in yellow. To see the newly-added content, click the tabs.



11. **Remove content from the channel.**

Modifications to the content selections affect only the selected language view.

a. In the channel header, select a language from the drop-down menu.

b. Locate the content you want to remove from the channel.

c. Click ⊖. The content is removed from the channel list and the number of assets updates.

12. **Associate one or more audiences to the custom channel.**

a. In the Audiences section, click **Select audiences**.

b. Search for the audiences you want to access the custom channel.

c. Click ⊕ for all audiences you wish to associate to the custom channel.

d. Click **Done**. The Create Channel page displays again.

e. Click **Publish**. The custom channel publishes to Percipio and is available to the users in your selected audiences

> **Note:** If you do not select an audience, the custom channel displays to all learners via the **All users** audience. If a learner is not entitled to content in the custom channel, an error message displays to him instead of the asset. To avoid this, select one or more audiences associated to the license pool in which the channel's content is included.

13. Select one of the available actions:

- **Save and close**: Saves your changes for modification or publication later, and places your channel into a **Draft** status. You can then associate the custom channel to an audience.

- **Publish**: Publishes your channel to Percipio, and places your channel into a **Published** status. By default, the custom channel is associated to the **All Users** audience. If you do not want all users in your organization to access the content within your custom channel, associate the custom channel to another audience.

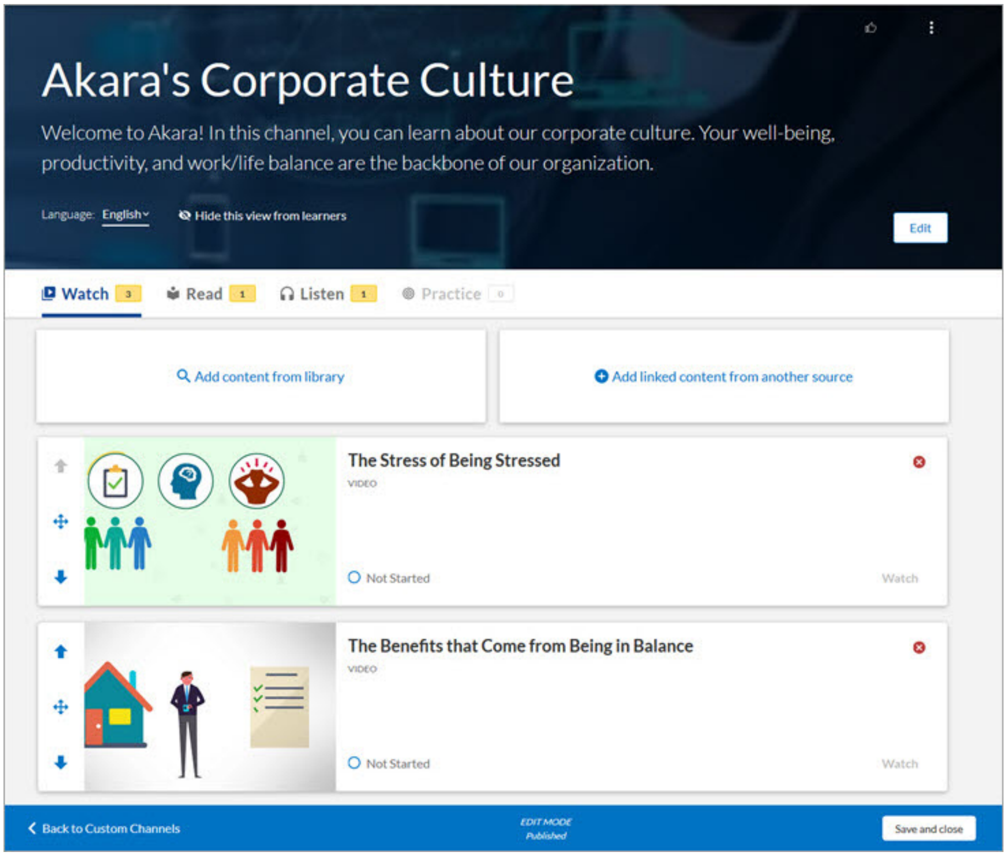
> **Note:** It may take several minutes for the channel to display in the library and in search results.

Copy a Custom Channel

You can copy a custom channel that is in a **Published** status in Percipio. Copying a custom channel that is in an **Unpublished Changes** status only copies the channel's currently-published header and content.

To copy a custom channel

1. From the Admin menu, select **CONTENT** > **Custom Channels**. The Custom Channels page displays.
2. Locate the custom channel you wish to copy.
3. Click ⋮ > **Copy and edit channel**. The channel page displays.

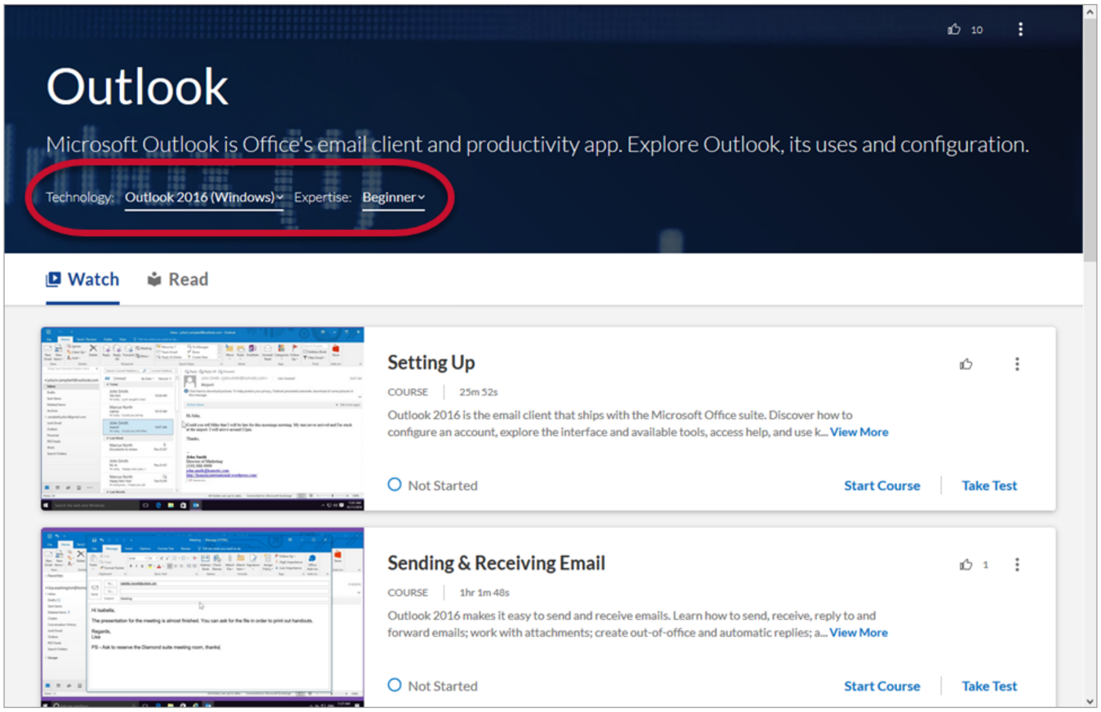


4. Edit the channel:

   - If the custom channel you copied has multiple technologies, versions, and/or expertise levels, see Edit a Multi-view Custom Channel.
   - If the custom channel you copied *does not* have multiple technologies, versions, and/or expertise levels, see Edit a Single-view Custom Channel.

Multi-view Channels

Multi-view channels can contain multiple languages, technologies, versions, and/or expertise levels; each combination of these selections presents a different channel view. A **channel view** displays the content within the channel selections.



Important information about multi-view channels

- Review the Automatic content updates section on the Custom Channels page.
- You can copy an existing Skillsoft or custom multi-view channel.
- When you copy a multi-view channel, all channel views (all versions of the technologies, languages, versions, and expertise levels) are copied within it.
- You can copy multi-view channels and customize them in supported languages using Skillsoft content, custom content, or a combination of both.

  > **Note:** If you copy a channel that has languages you did not license, those language views also get copied and must be hidden in order for you to publish the channel.

- When you create a copy of a Skillsoft channel, it becomes a custom channel.

- You can modify a custom channel that is in a **Draft**, **Unpublished Changes**, or **Published** status in Percipio.
- When you copy a multi-view channel, **all** channel views are copied into **all** available languages, and are given a default title of the original channel's name with a date and time stamp attached (for example *Excel - (2018-12-11T17:29:09.691*).

Copy a Multi-view Stock Channel

Prior to copying a multi-view stock channel, Skillsoft recommends you review the following:

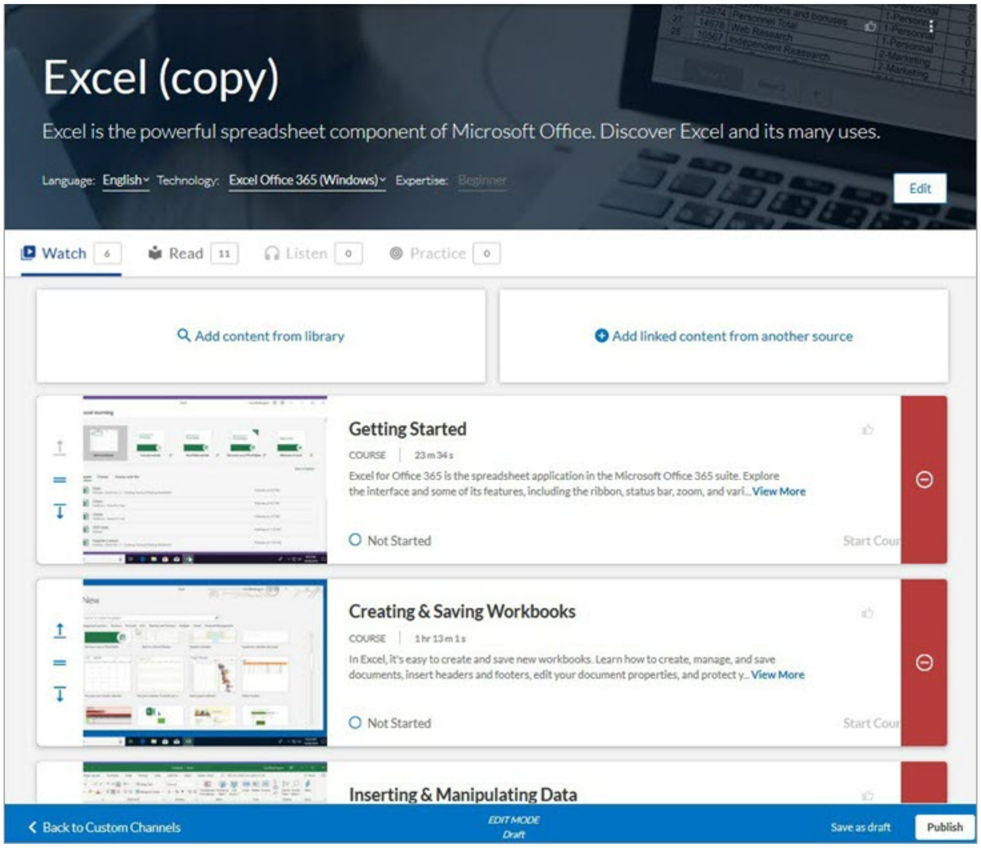
- Important information about multi-view channels
- Automatic content updates for copied channels

To copy a multi-view stock channel

1. Using the library or search, navigate to the multi-view channel you wish copy.
2. In the channel header, click ⋮ > **Copy and edit channel**.

   > **Note:** All channel views (languages, technologies, versions of technologies, and expertise levels) are copied when you copy a multi-view channel.

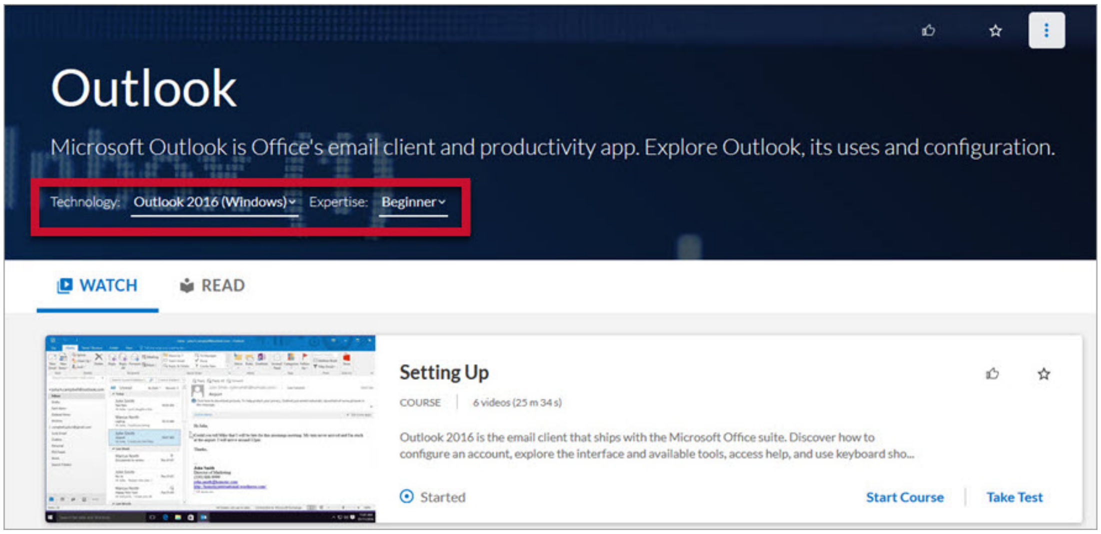
3. Enter a new **title** for the channel.
4. Click **Ok**. The channel page displays.



5. Edit the multi-view custom channel.

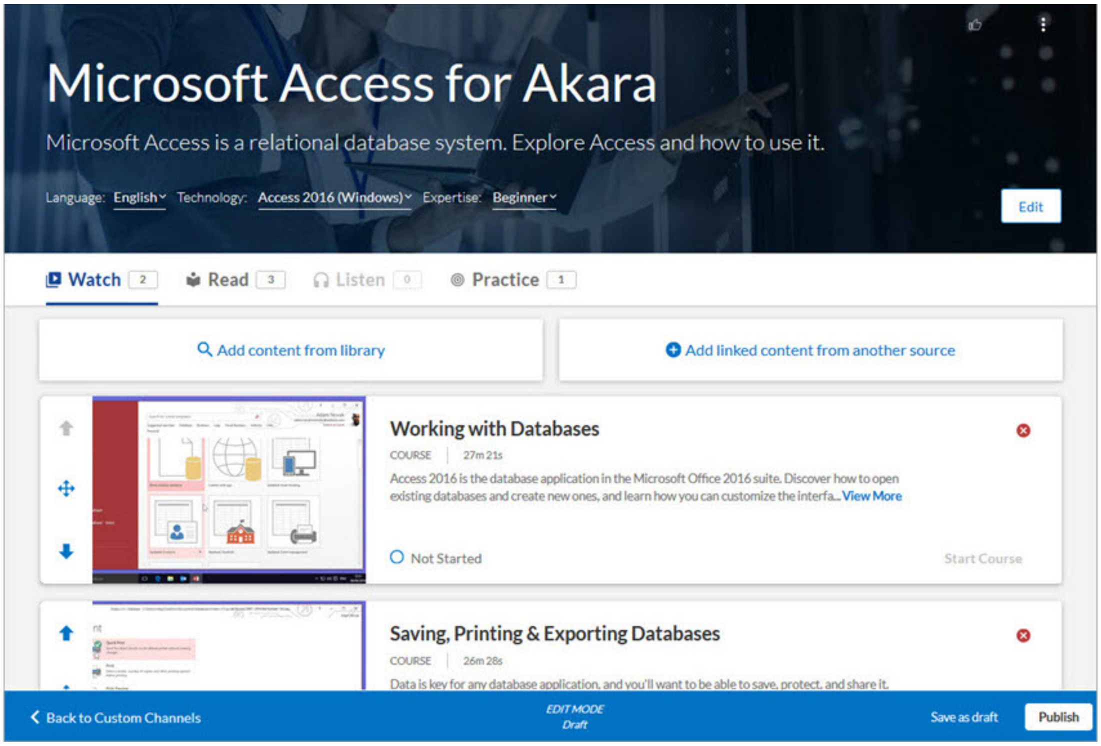
Edit a Multi-view Custom Channel

Multi-view channels can contain multiple languages, technologies, versions, and/or expertise levels; each combination of these selections presents a different channel view. A **channel view** displays the content within the channel selections.



To edit a multi-view custom channel

1. From the Admin menu, select **CONTENT** > **Custom Channels**. The Custom Channels page displays.
2. Locate the multi-view custom channel you wish to modify.
3. Click the channel name, or click ⋮ > **Edit**. The channel page displays.

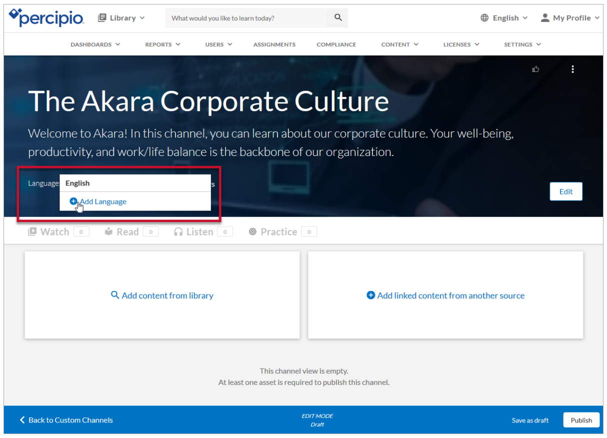


4. In the header, select the **language**, **technology**, **version**, and/or **expertise**. These selections make up the channel view you are editing.

    a. **Optionally, add additional languages for the channel.**

    When you copied the multi-view channel, all channel views (languages, technologies, versions, and expertise levels) were copied within it.

    a. On the header, click the **Language** drop-down. Available languages display in a list.

    b. Select the language(s) you want the channel to be available in.
    A new channel view is added for each selected language.

    c. In the **Language** drop down, select the language view you wish to edit.

    d. Click **Show this view to learners** to make the channel view available to learners when you publish the channel.

> **Note:** You cannot hide the English view of a channel.

5. **Change the title for each language in which the multi-channel is copied.**

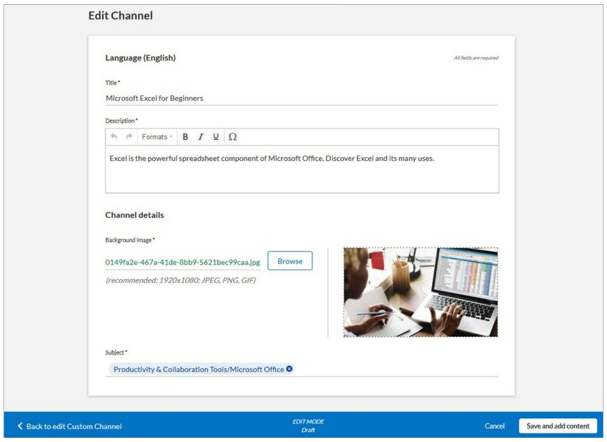
   When you copied the multi-view channel, all channel views (languages, technologies, versions, and expertise levels) were copied within it.

   a. Select a language from the drop-down list.
   b. Click **Edit**. The Edit Channel page displays.
   c. Change the **Title**.
   d. Click **Save and add content**. The channel page displays.
   e. Repeat these steps for each language.

6. **Modify the channel header.**

   Modifications to the channel header affect only the selected language view.

   a. In the channel header, select a language from the drop-down menu.
   b. Click **Edit**. The Edit Channel page displays.



c. Enter a new **Title** for the channel. This title displays regardless of what channel view the learner selects.

> **Note:** Before proceeding, Skillsoft recommends that you change the copied channel title for each language on your site, regardless of whether you plan to use the channel in multiple languages or not. See step 1.

d. Enter a **Description**.

> **Note:** The more text you enter into the description, the easier it is for your users to find the channel in their search results.

e. In the Channel details section, choose a background image.

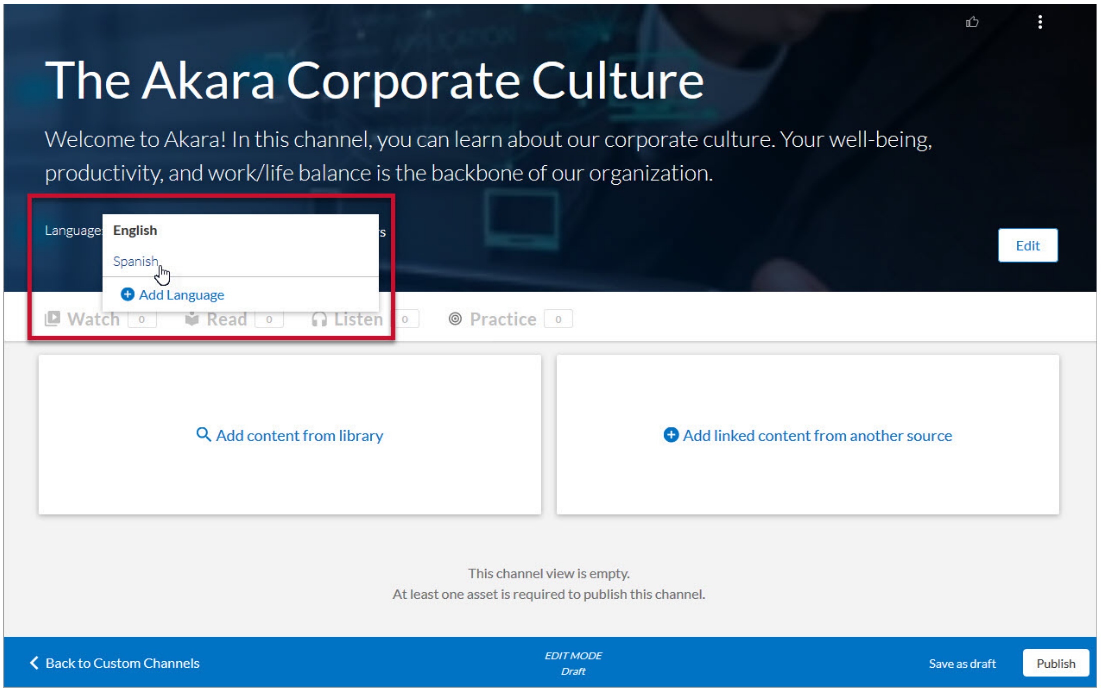
- The background image displays at the top of the channel.

- Channel images must be uploaded to Percipio in a 16x9 aspect ratio.
- The recommended size for the image is 1920 x 1080px with a file size of no more than 300k

f. Select your area and subject (for library placement) from the **Subject** drop-down list. You can select either Skillsoft or custom areas/subjects.

g. Click **Save and add content**.

7. Hide channel views you do not want your learners to access.
8. Select the language of the channel you wish to modify from the language drop-down.



9. Select the channel view you wish to edit by choosing the specific language, technology, version, and/or expertise level from the drop-downs in the header.

10. **Add content to the channel view.**

Modifications to the content selections affect only the selected channel view (language, technology, version, and/or expertise selected in the header).

a. In the channel header, select a language from the drop-down menu.

b. On the channel page, add new content:

- Click **Add content from library**: Search the Skillsoft library for existing content.

  i. Enter search terms and click 🔍.

  > **Note:** You can only search content in the language selected in the channel header. If no language options are available to you on the header, search results are in English.

  ii. Optionally, use the filters to refine your search results.

  iii. Click ⊕ next to the content to add it to the channel.

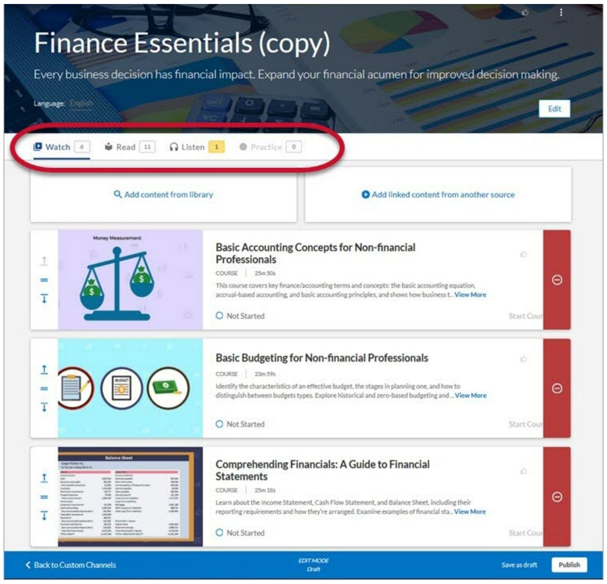
  You can include a selection of custom content, Skillsoft content, or a combination of both.If using Skillsoft content, ensure your users can view and access it by including them in audiences that are associated with the content license pools.

    - Click **Add linked content from another source**: The Add Linked Content page displays, and you can create a new external link for your channel. Once created, Percipio returns you to the channel page, with the new external link added to your channel. See Create an External Link for steps.

c. If you added content but want to remove it before saving, click ✓.

d. Click **Done**.

   The number of assets in each modality updates in yellow. To see the newly-added content, click the tabs.



11. **Remove content from the channel view.**

    Modifications to the content selections affect only the selected channel view.

a. In the channel header, select a language from the drop-down menu.

b. Locate the content you want to remove from the channel.

c. Click ⊖. The content is removed from the channel list and the number of assets updates.

12. **Associate one or more audiences to the custom channel.**

a. In the Audiences section, click **Select audiences**.

b. Search for the audiences you want to access the custom channel.

c. Click ⊕ for all audiences you wish to associate to the custom channel.

d. Click **Done**. The Create Channel page displays again.

e. Click **Publish**. The custom channel publishes to Percipio and is available to the users in your selected audiences

> **Note:** If you do not select an audience, the custom channel displays to all learners via the **All users** audience. If a learner is not entitled to content in the custom channel, an error message displays to him instead of the asset. To avoid this, select one or more audiences associated to the license pool in which the channel's content is included.

13. Select one of the available actions:

- **Save and close**: Saves your changes for modification or publication later, and places your channel into a **Draft** status. You can then associate the custom channel to an audience.

- **Publish**: Publishes your channel to Percipio, and places your channel into a **Published** status. By default, the custom channel is associated to the **All Users** audience. If you do not want all users in your organization to access the content within your custom channel, associate the custom channel to another audience.

  > **Note:** It may take several minutes for the channel to display in the library and in search results.

Manage Hidden Content

Using the hide and show features of channels and journeys along with the Manage Hidden Content page, you can control what your learners see when interacting with Percipio.

> **NOTE:** Content within a hidden channel or journey still shows in search results, but learners cannot see the content, channel, or journey when browsing. If you want to hide content from learners who search, hide the channel or journey and the individual content item.

Content continues to automatically update in hidden Skillsoft channels and journeys.

Hiding individual content items

When you choose to hide an individual content item, it does not show when the learner browses or searches. This is true whether the learner is using Percipio on the web, the mobile app, or the Percipio app for Microsoft Teams. Other important information about hiding content include:

- Hidden content items do not show in channels, journeys, or assignments.
- Learners can still complete a journey or assignment even if they can't see all the content.
- Hidden content does not show in re-engagement or recommendation email notifications.
- Admins do not see hidden content when they make assignments or use content promotions.
- If you use a content item in an assignment or promotion, then hide that item, learners will still see the item, but if they go to launch it, they get a message that they don't have access to the item.

To hide individual content items

These steps hide the content items from your learners and admins from browse and search. Items already used in assignments or promotions remain visible to the learner.

1. From the **Content** menu, select **Manage Hidden Content**. Ensure the Content tab is active.
2. Select **Find content to hide**.
3. Select the language of the content to hide.
4. Search for the title you want to hide.
5. From the list of results, locate the item to hide, then select the blue plus .
6. Repeat steps 3, 4, and 5 until you select all content you want to hide. Percipio keeps your selections between searches.
7. From the bottom of the page, select **Hide content**.

8. In the pop up box that appears, select a reason for hiding the content.
9. Review the list of items for accuracy.
10. Select **Hide content**. Learners no longer see the items when they browse or search.

To show hidden content items

These steps show hidden content items to your learners.

1. From the **Content** menu, select **Manage Hidden Content**. Ensure the Content tab is active.
2. From the list, locate the content you want to make visible.
3. Click > **Make visible**.
4. In the pop up box that appears, select **Make Visible**. You can also choose to Cancel at this point to keep the item hidden.

If you want to show many items at the same time:

1. Click **Bulk Actions**.
2. Select all or some of the items using the check box on the left.
3. With items selected select **Make content visible**.

Hide channels

When you hide channels, you are only hiding the channel from learners when they browse or search. Learners can still discover individual content items within a hidden channel when searching. This is so you can create a copy of a Skillsoft channel then customize it and learners can still access the content. You can then hide the original Skillsoft channel so learners only see your custom channel.

To hide an entire Skillsoft or custom channel

These steps hide the entire channel from your learners. If you wish to hide specific channel views of a multi-view channel, see the **To hide a channel view** drop-down below.

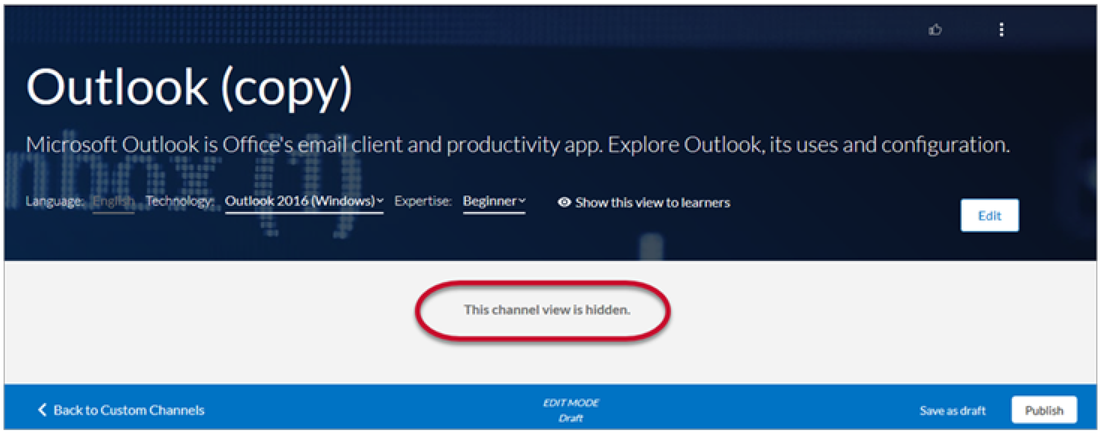
1. Using the library or search, browse to the channel you want to hide.
2. In the channel header, click > **Hide**.
3. Click **Hide** in the dialog box to confirm you want to hide the channel. The Manage Hidden Content list displays, updated with the channel you hid, and the channel is no longer available to learners.

To hide a custom channel view

You can hide a language view only from custom multi-view channels.

You cannot hide a single language view from multi-view Skillsoft channels; you must hide the entire Skillsoft channel.

1. From the Admin menu, click **CONTENT** > **Channels**. The Custom Channels page displays.
2. Locate the custom multi-view channel that has the view(s) you wish to hide from your learners.
3. Click the channel name to open it.
4. In the channel header, select the language, technology, version, and/or expertise level from the drop-downs to open the view you wish to hide.
5. Click **Hide this view from learners**. The page refreshes and the channel content is hidden.



6. Repeat these steps for all views you wish to hide.

7. Select one of the available actions:

    - **Save and close**: Saves your changes for modification or publication later, and places your channel into a **Draft** status. You can then associate the custom channel to an audience.

    - **Publish**: Publishes your channel to Percipio, and places your channel into a **Published** status. By default, the custom channel is associated to the **All Users** audience. If you do not want all users in your organization to access the content within your custom channel, associate the custom channel to another audience.

> **Note:** It may take several minutes for the channel to display in the library and in search results.

Hide journeys

When you hide journeys, you are only hiding the journey from learners when they browse or search. Learners can still discover individual content items that exist in a hidden journey when they search. This is so you can create a copy of a Skillsoft Aspire journey then customize it and learners can still access the content. You can then hide the original Skillsoft Aspire journey so learners only see your custom journey.

To hide an Aspire or custom journey

You might choose to hide a Skillsoft Aspire Journey, if you made a copy of it so you could add content in other languages. This procedure hides the entire journey from your learners.

1. Using the library or search, browse to the journey you want to hide.
2. In the journey header, click ⋮ > **Hide**.
3. Click **Hide** in the dialog box to confirm you want to hide the journey. The Manage Hidden Content list displays, updated with the journey you hid, and the journey is no longer available to learners.

Show hidden channels

To show a hidden Skillsoft or custom channel

There are two ways you can show a hidden channel.

To show a hidden channel from the Manage Hidden Content page

1. From the Admin menu, select **CONTENT > Manage Hidden Content** page.
2. Locate the channel you want to show to your learners.
3. Click ⋮ > **Make visible**.
4. Click **Show** in the dialog box to confirm you want to show the channel to learners.

The list updates, with the selected channel removed from the list, and the channel is immediately available to learners.

To show a hidden channel from the Custom Channels page

1. From the Admin menu, select **CONTENT > Custom Channels** page.
2. Locate the channel you want to show to your learners. Hidden channels are marked with an eye icon.
3. Click ⋮ > **Make visible**.
4. Click **Show** in the dialog box to confirm you want to show the channel to learners.

To show a hidden custom channel view

1. From the Admin menu, select **CONTENT** > **Channels**. The Custom Channels page displays.
2. Locate the multi-view channel.
3. Click the channel name to open it.
4. In the channel header, choose your selections to display the hidden channel view.
5. Click **Show this view to learners**. The page refreshes and the channel content displays.
6. Select one of the available actions:
   - **Save and close**: Saves your changes for modification or publication later, and places your channel into a **Draft** status. You can then associate the custom channel to an audience.

- **Publish**: Publishes your channel to Percipio, and places your channel into a **Published** status. By default, the custom channel is associated to the **All Users** audience. If you do not want all users in your organization to access the content within your custom channel, [associate the custom channel to another audience](#).

  > **Note:** It may take several minutes for the channel to display in the library and in search results.

Show hidden journeys

To show a hidden Aspire or custom journey

There are two ways you can show a hidden journey.

To show a hidden journey from the Manage Hidden Content page

1. From the Admin menu, click **CONTENT > Manage Hidden Content** page.
2. Locate the journey you want to show to your learners.
3. Click ⋮ > 👁 **Make visible**.
4. Click **Show** in the dialog box to confirm you want to show the journey to learners.

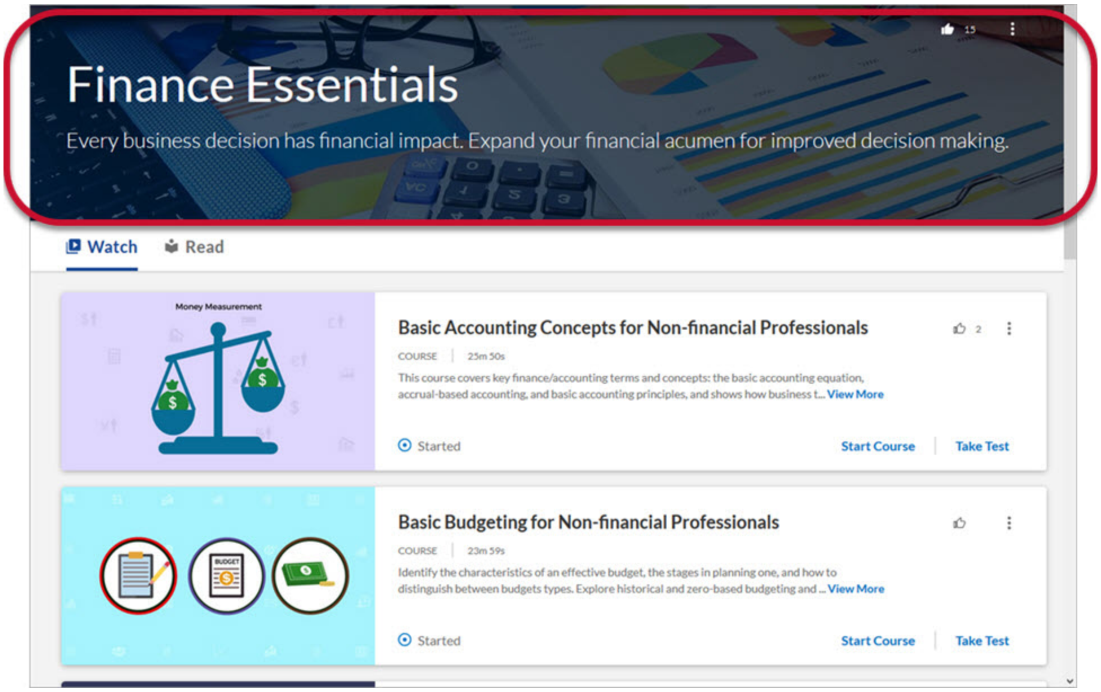
   The list displays, with the selected journey removed from the list, and the journey is immediately available to learners.

To show a hidden channel from the Custom Journeys page

1. From the Admin menu, click **CONTENT > Journeys** page.
2. Locate the journey you want to show to your learners. Hidden journeys are marked with an eye icon.
3. Click ⋮ > **Make visible**.
4. Click **Show** in the dialog box to confirm you want to show the journey to learners.

Single-view Channels

A single-view channel does not have technology, version, or expertise level selections on the header.



Important information about single channels

- Review the Automatic content updates section on the Custom Channels page.
- You can copy an existing Skillsoft single-view channel or an existing custom channel, and you can copy it into any of your supported languages. If

you do not have content available within your selected language, a message displays.

- You can copy single-view channels and customize them in supported languages using Skillsoft content, custom content, or a combination of both.
- You can edit a channel that is in a **Draft**, **Unpublished Changes**, or **Published** status in Percipio.

Copy a Single-view Skillsoft Channel

Prior to copying a single-view Skillsoft channel, review the following:

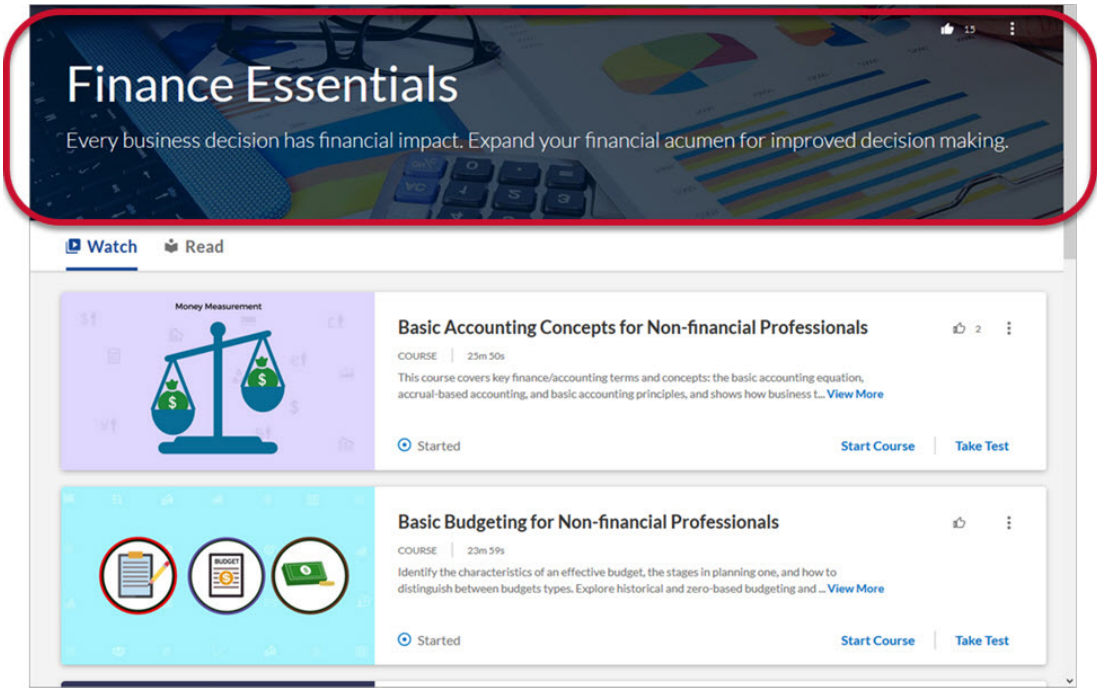
- Important information about single-view channels
- Automatic content updates for copied channels

To copy a single-view Skillsoft channel

1. Using the library or search, navigate to the single-view Skillsoft channel you wish copy.
2. In the channel header, click ⋮ > **Copy and edit channel**.
3. Enter a new **title** for the channel.
4. Click **OK**. The channel page displays.
5. Edit the new single-view custom channel you created.

Edit a Single-view Custom Channel

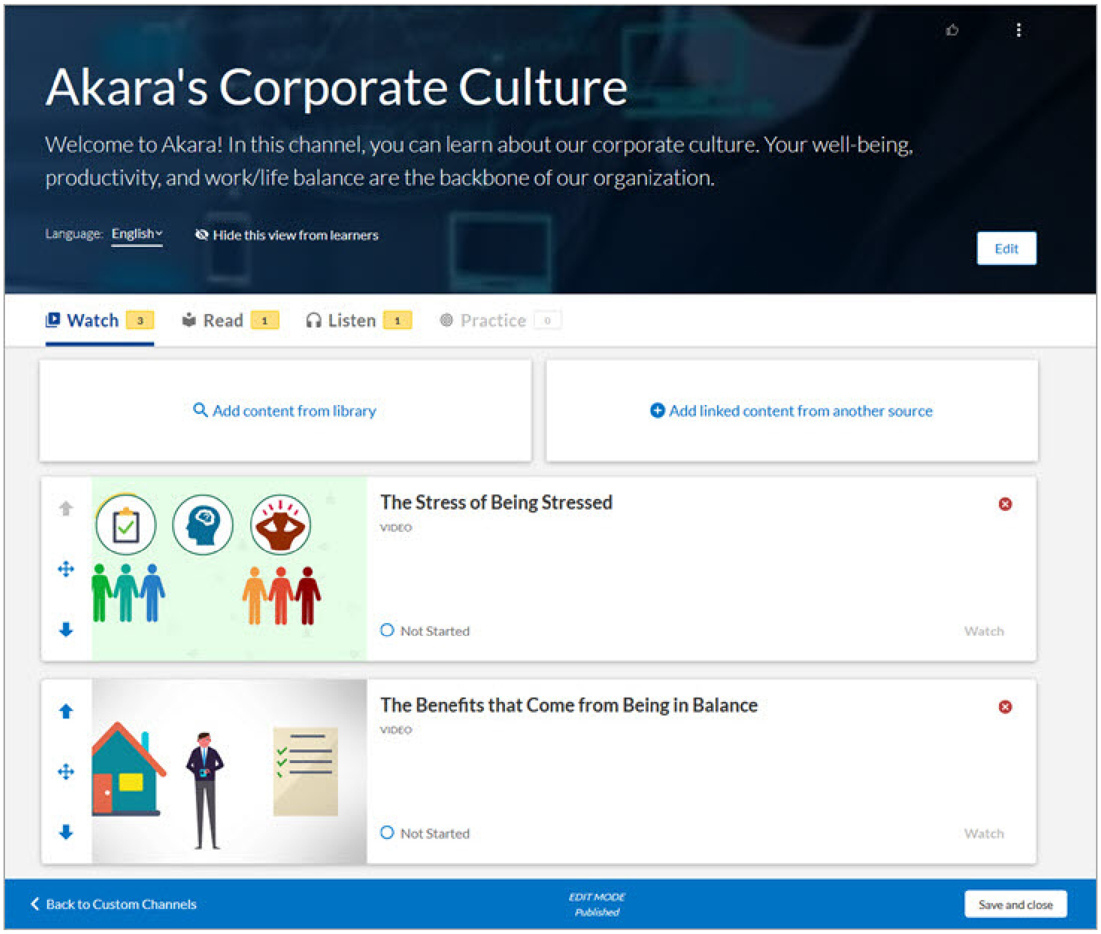
A single-view channel does not have technology, version, or expertise level selections on the header.



You can edit a custom channel that is in a **Draft**, **Unpublished Changes**, or **Published** status in Percipio.

To edit a single-view channel

1. From the Admin menu, select **CONTENT** > **Custom Channels**. The Custom Channels page displays.
2. Click the channel name, or click ⋮ > **Edit**. The channel page displays.



3. **Modify the channel header.**

   a. From the **CONTENT > Custom Channels** page, locate the custom channel you wish to modify.

   b. Click the channel name, or click ⋮ > **Edit**. The channel page displays.

   c. Enter a new **title** for the channel.

   d. Enter a **description**.

> **Note:** The more text you enter into the description, the easier it is for your users to find the channel in their search results.

e. Choose a background image.
   - The background image displays at the top of the channel.
   - Channel images must be uploaded to Percipio in a 16x9 aspect ratio.
   - The recommended size for the image is 1920 x 1080px with a file size of no more than 300k

f. Select your area and subject from the drop-down list. You can select either stock or custom areas/subjects.

g. Click **Save and add content**.

4. ### Add content to the channel.

   Modifications to the content selections affect only the selected language view.

   a. In the channel header, select a language from the drop-down menu.

   b. On the channel page, add new content:
      - Click **Add content from library**: Search the Skillsoft library for existing content.

i. Enter search terms and click .

Note: You can only search content in the language selected in the channel header. If no language options are available to you on the header, search results are in English.

ii. Optionally, use the filters to refine your search results.

iii. Click next to the content to add it to the channel.

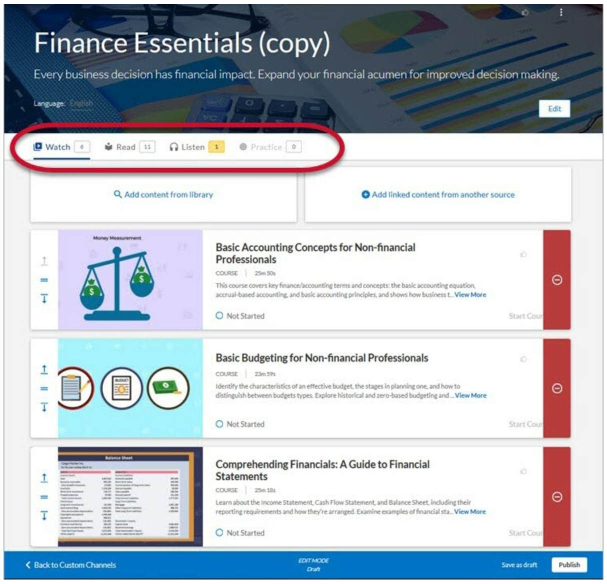
You can include a selection of custom content, Skillsoft content, or a combination of both.If using Skillsoft content, ensure your users can view and access it by including them in audiences that are associated with the content license pools.

- Click **Add linked content from another source**: The Add Linked Content page displays, and you can create a new external link for your channel. Once created, Percipio returns you to the channel page, with the new external link added to your channel. See Create an External Link for steps.

c. If you added content but want to remove it before saving, click .

d. Click **Done**.

The number of assets in each modality updates in yellow. To see the newly-added content, click the tabs.



5. **Remove content from the channel.**

   Modifications to the content selections affect only the selected language view.

   a. In the channel header, select a language from the drop-down menu.

   b. Locate the content you want to remove from the channel.

   c. Click . The content is removed from the channel list and the number of assets updates.

6. **Associate one or more audiences to the custom channel.**

a. In the Audiences section, click **Select audiences**.

b. Search for the audiences you want to access the custom channel.

c. Click ⊕ for all audiences you wish to associate to the custom channel.

d. Click **Done**. The Create Channel page displays again.

e. Click **Publish**. The custom channel publishes to Percipio and is available to the users in your selected audiences

> **Note:** If you do not select an audience, the custom channel displays to all learners via the **All users** audience. If a learner is not entitled to content in the custom channel, an error message displays to him instead of the asset. To avoid this, select one or more audiences associated to the license pool in which the channel's content is included.

7. Select one of the available actions:

   - **Save and close**: Saves your changes for modification or publication later, and places your channel into a **Draft** status. You can then associate the custom channel to an audience.
   - **Publish**: Publishes your channel to Percipio, and places your channel into a **Published** status. By default, the custom channel is associated to the **All Users** audience. If you do not want all users in your organization to access the content within your custom channel, associate the custom channel to another audience.

     > **Note:** It may take several minutes for the channel to display in the library and in search results.

Associate a Custom Channel to an Audience

To control which learners can view your custom channels, associate the channels to one or more audiences. This entitles only those learners within the specified audience(s) to view the custom channels. You can associate custom channels and audiences through the **Create Audience**, **Edit Audience**, **Create Custom Channel**, and **Edit Custom Channel** pages in Percipio. You can also associate an audience to a custom channel within the Custom Channel workflow.

> **Note:** Skillsoft content within a custom channel remains viewable to users who have a license to the content, but they can only access it via browsing the library, Percipio Search, or from an assignment containing the content. See Audience Associations for information about granting licenses to users.

To associate a new custom channel to an existing audience

This procedure is available only to Site Admins and Content Curators.

1. From the Admin menu, select **CONTENT** > **Custom Channels**. The Custom Channels page displays.
2. Click **Add Custom Channel**. The Create Channel page displays.
3. Enter a **Title** and **Description** for the channel, and select a background image.
4. Select your area and subject (for library placement) from the **Subject** drop-down list.
5. Click **Save and add content**.

6. Add content to the channel. For details about this step, see Add content to the channel.
7. At the bottom of the Create Channel page, in the Audience section, click **Select audiences**. The Select Audiences page displays.
8. Use the search to locate the audiences you want to associate to the custom channel and click ⊕ next to all audiences you wish to include.

   > **Note:** If you do not select an audience, the custom channel displays to all learners via the **All users** audience. If a learner is not entitled to content in the custom channel, an error message displays to him instead of the asset. To avoid this, select one or more audiences associated to the license pool in which the channel's content is included.

9. Click **Done**. The Create Channel page displays again.
10. Click **Publish**.

    Your channel publishes to Percipio and is available to the learners in your selected audiences.

To associate an existing custom channel to an existing audience

This procedure is available only to Site Admins and Content Curators. See the Important information about associating custom channels and audiences section above to view potential learner impacts.

1. From the Admin menu, select **CONTENT** > **Custom Channels**. The Custom Channels page displays.
2. Locate the channel you wish to associate to an audience.
3. Click ⋮ > ✎ **Edit**. The Edit Custom Channel page displays.
4. In the Audience section, click **Select audiences**. The Select Audiences page displays.

   > **Note:** If you do not select an audience, the custom channel displays to all learners via the **All users** audience. If a learner is not entitled to content in the custom channel, an error message displays to him instead of the asset. To avoid this, select one or more audiences associated to the license pool in which the channel's content is included.

5. Use the search to locate the audiences you want to associate to the custom channel and click ⊕ next to all audiences you wish to include.
6. Click **Done**. The Create Channel page displays again.
7. Click **Publish**.

   Your channel publishes to Percipio and is available to the learners in your selected audiences.

To associate a new audience to an existing custom channel

This procedure is available only to Site Admins.

1. From the Admin menu, click **USERS > Audience Management**.
2. Click **Create Audience**. The Create Audience page displays.

3. Enter the **audience details.**
4. Define your audience by specifying user attributes, adding individual users, or both.
5. In the **Content association** section, click **Associate custom channels**.
6. Either browse the list or enter a search term to locate the custom channel you want to associate to your audience.
7. Click for each custom channel you wish to associate to your audience.
8. Click **Associate to audience**. The Create Audience page displays again.
9. Click **Create Audience**.The audience displays in the audience list and is associated to the custom channel(s).

To associate an existing audience to an existing custom channel

This procedure is available only to Site Admins.

1. From the Admin menu, click **USERS > Audience Management**.
2. Locate the audience you wish to associate with the custom channel.
3. Click > **Edit**. The Edit Audience page displays.
4. In the **Content association** section, click **Associate custom channels**.
5. Either browse the list or enter a search term to locate the custom channel.

6. Click ⊕ for each custom channel you wish to associate to your audience.
7. Click **Associate to audience**.

    Note about Assignments: If a learner is removed from an associated audience and content within the custom channel is included in one or more of their assignments, the assignment remains on the Assignments page only if it is in an **In Progress** or **Completed** status, or if it contains content entitled to them via another audience association. Any content within the assignment that they are no longer entitled to displays as unavailable, and the assignment cannot be completed.

8. Click **Update Audience**.
9. Repeat steps 2 - 7 for additional audiences you want to associate to the custom channel

Important information about associating custom channels and audiences

- By default, custom channels are associated to the **All Users** audience.
- When you associate a custom channel to one or more audiences, the **All Users** audience association is removed and only the specified audience (s) can access the channel.
- If you change the audience association from **All Users** to a specific audience, learners in the **All Users** audience lose access to the channel's content because only those learners in the specified audience can access the content.

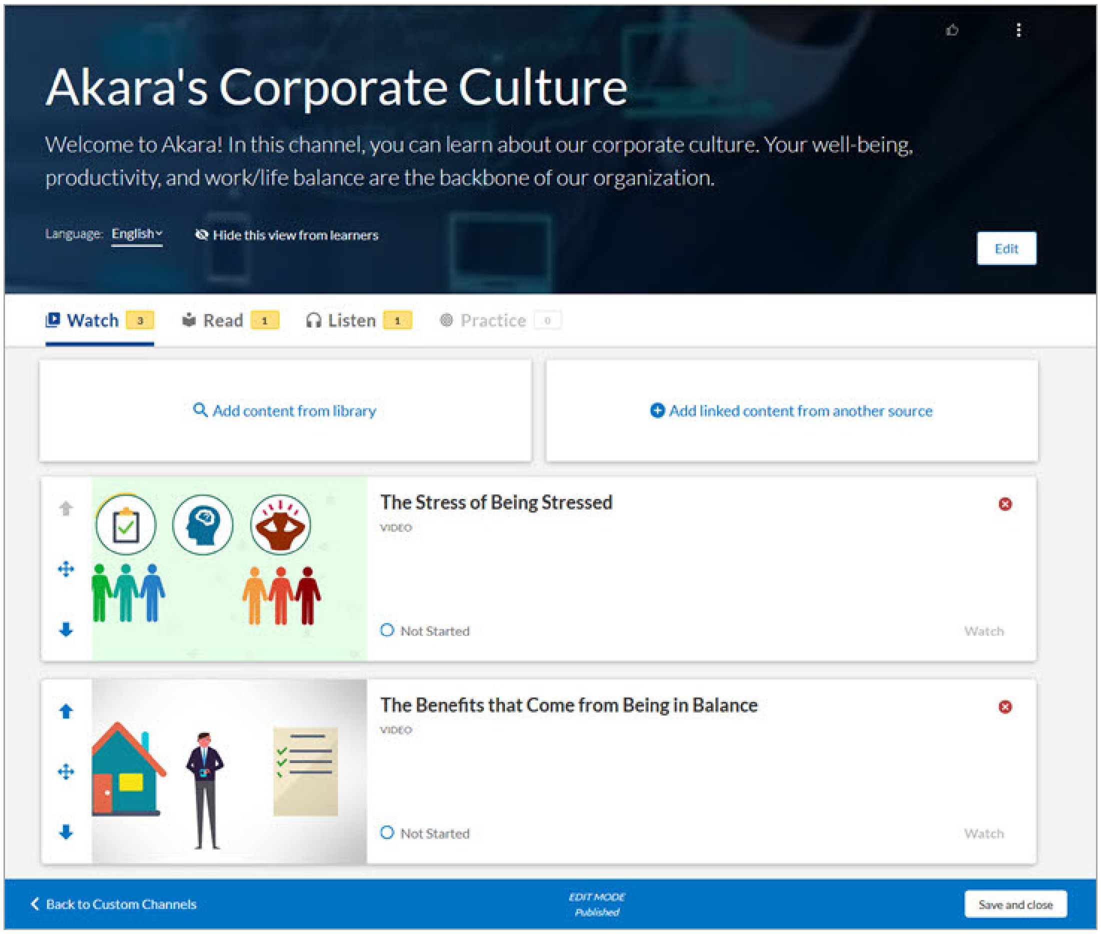
- Adding learners to an associated audience automatically entitles them to view the custom channel and grants them license to all content within it.
- If you remove a learner from an associated audience, they lose access to the channel's content (if they do not have access to the specific content from any other audience associations).

Add a Language View to a Custom Channel

A **language view** displays the content within a specific language of a channel. You can add a language view to both custom single-view and custom multi-view custom channels that are in a **Draft**, **Unpublished Changes**, or **Published** status in Percipio.

To add a language view

1. From the Admin menu, select **CONTENT** > **Custom Channels**. The Custom Channels page displays.
2. Locate the custom channel to which you want to add a language view.
3. Select the channel name, or ⋮ > **Edit**. The channel page displays.



4. If your custom channel is a multi-view channel, set the channel view by selecting the specific technology, version, and/or expertise level from the drop-downs in the header.

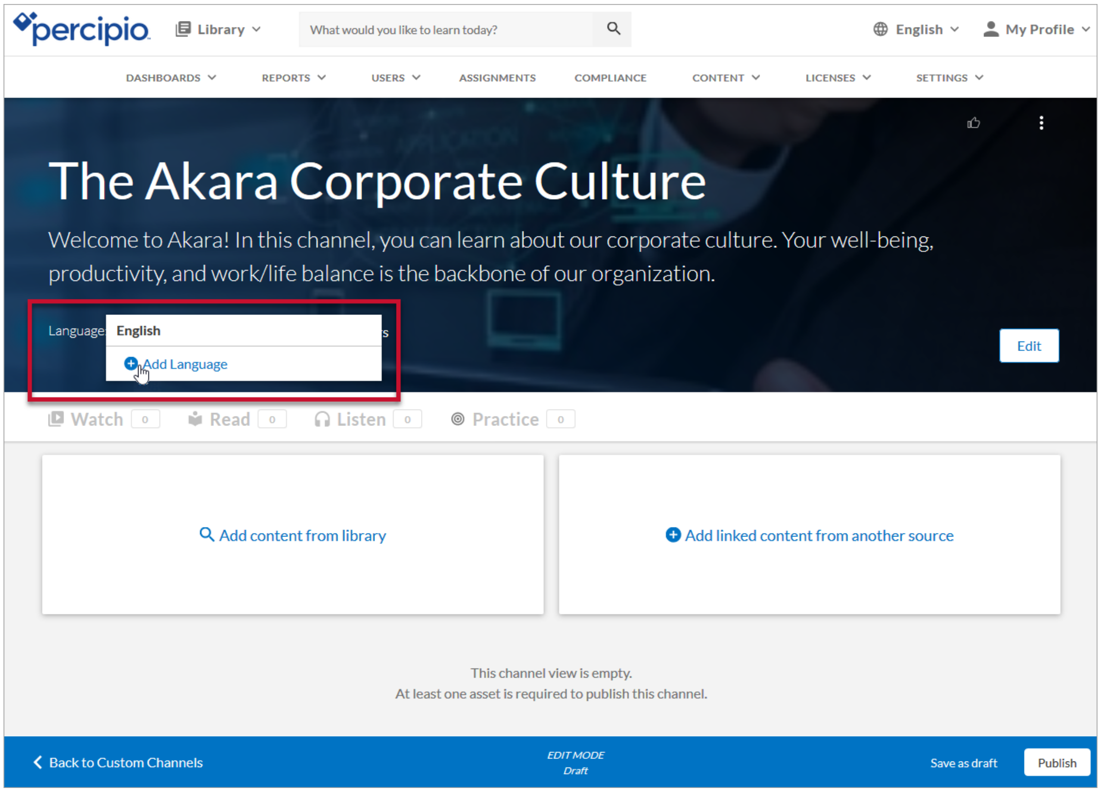
> **Note:** Content added to this channel view only displays when the selections here match the learner's selections.

> For example, you create a copy of the Outlook channel and select the following options:
>
> **Language:** English
> **Technology:** Outlook
> **Version:** 2016 (Mac)

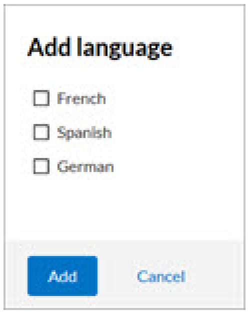
Expertise level: Beginner

Setting these options opens the *English: Outlook 2016 (Mac) for Beginners* view. Content within this view is only visible to learners if they select the same options. So if you add a *Setting Up* course to the *English: Outlook 2016 (Mac) for Beginners* view, learners who select a different language, technology, version, or expertise level do not see that specific course; you must add it to each view.

5. On the header, select the **Language** drop-down.



6. Select **Add Language**. The language box displays:



If the channel is already available in one or more supported languages, those languages are not listed in the language box.

7. Select the language(s) you want the channel to be available in and select **Add**.

   A new language view is added for each selected language.

8. In the **Language** drop down, select the language view you wish to edit.
9. Select **Show this view to learners** to make the channel view available to learners when you publish the channel.
10. **Note:** You cannot hide the English view of a channel.
11. Add content to the language view. To identify courses in a local language, see Find a course in a different language or use the All content listing by collection or All content listing by title reports and filter on the **English Equivalent Title** column for the English title you are using.

    Note: Language views do not publish and are not available to learners until you add at least one content item.

12. Add content items:
    - If the custom channel you copied has multiple technologies, versions, and/or expertise levels, see Edit a Multi-view Custom Channel.

- If the custom channel you copied *does not* have multiple technologies, versions, and/or expertise levels, see Edit a Single-view Custom Channel.

Manage Hidden Content

Using the hide and show features of channels and journeys along with the Manage Hidden Content page, you can control what your learners see when interacting with Percipio.

> **NOTE:** Content within a hidden channel or journey still shows in search results, but learners cannot see the content, channel, or journey when browsing. If you want to hide content from learners who search, hide the channel or journey and the individual content item.

Content continues to automatically update in hidden Skillsoft channels and journeys.

Hiding individual content items

When you choose to hide an individual content item, it does not show when the learner browses or searches. This is true whether the learner is using Percipio on the web, the mobile app, or the Percipio app for Microsoft Teams. Other important information about hiding content include:

- Hidden content items do not show in channels, journeys, or assignments.
- Learners can still complete a journey or assignment even if they can't see all the content.
- Hidden content does not show in re-engagement or recommendation email notifications.
- Admins do not see hidden content when they make assignments or use content promotions.

- If you use a content item in an assignment or promotion, then hide that item, learners will still see the item, but if they go to launch it, they get a message that they don't have access to the item.

To hide individual content items

These steps hide the content items from your learners and admins from browse and search. Items already used in assignments or promotions remain visible to the learner.

1. From the **Content** menu, select **Manage Hidden Content**. Ensure the Content tab is active.
2. Select **Find content to hide**.
3. Select the language of the content to hide.
4. Search for the title you want to hide.
5. From the list of results, locate the item to hide, then select the blue plus.
6. Repeat steps 3, 4, and 5 until you select all content you want to hide. Percipio keeps your selections between searches.
7. From the bottom of the page, select **Hide content**.
8. In the pop up box that appears, select a reason for hiding the content.
9. Review the list of items for accuracy.
10. Select **Hide content**. Learners no longer see the items when they browse or search.

To show hidden content items

These steps show hidden content items to your learners.

1. From the **Content** menu, select **Manage Hidden Content**. Ensure the Content tab is active.
2. From the list, locate the content you want to make visible.
3. Click ⋮ > **Make visible**.
4. In the pop up box that appears, select **Make Visible**. You can also choose to Cancel at this point to keep the item hidden.

If you want to show many items at the same time:

1. Click **Bulk Actions**.
2. Select all or some of the items using the check box on the left.
3. With items selected select **Make content visible**.

Hide channels

When you hide channels, you are only hiding the channel from learners when they browse or search. Learners can still discover individual content items within a hidden channel when searching. This is so you can create a copy of a Skillsoft channel then customize it and learners can still access the content. You can then hide the original Skillsoft channel so learners only see your custom channel.

To hide an entire Skillsoft or custom channel

These steps hide the entire channel from your learners. If you wish to hide specific channel views of a multi-view channel, see the **To hide a channel view** drop-down below.

1. Using the library or search, browse to the channel you want to hide.
2. In the channel header, click ⋮ > **Hide**.

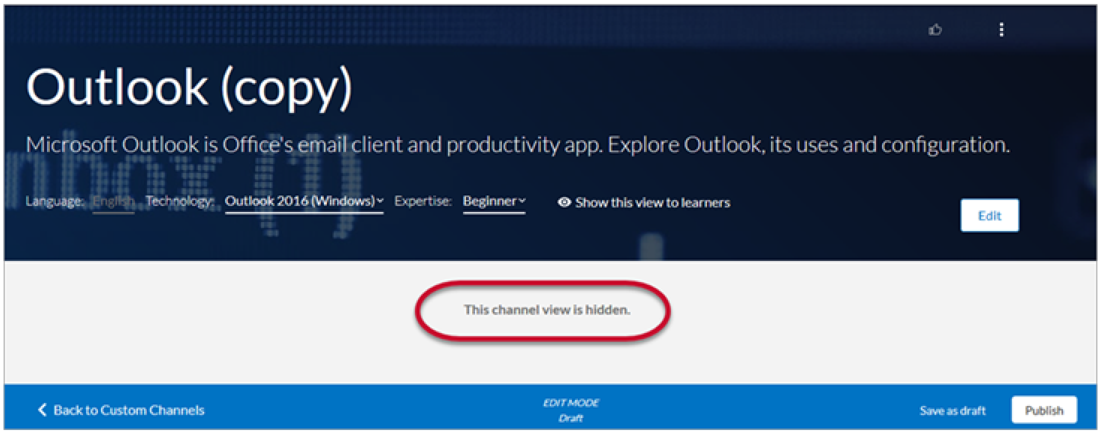
3. Click **Hide** in the dialog box to confirm you want to hide the channel. The Manage Hidden Content list displays, updated with the channel you hid, and the channel is no longer available to learners.

To hide a custom channel view

You can hide a language view only from custom multi-view channels.

You cannot hide a single language view from multi-view Skillsoft channels; you must hide the entire Skillsoft channel.

1. From the Admin menu, click **CONTENT** > **Channels**. The Custom Channels page displays.
2. Locate the custom multi-view channel that has the view(s) you wish to hide from your learners.
3. Click the channel name to open it.
4. In the channel header, select the language, technology, version, and/or expertise level from the drop-downs to open the view you wish to hide.
5. Click **Hide this view from learners**. The page refreshes and the channel content is hidden.



6. Repeat these steps for all views you wish to hide.
7. Select one of the available actions:
   - **Save and close**: Saves your changes for modification or publication later, and places your channel into a **Draft** status. You can then associate the custom channel to an audience.
   - **Publish**: Publishes your channel to Percipio, and places your channel into a **Published** status. By default, the custom channel is associated to the **All Users** audience. If you do not want all users in your organization to access the content within your custom channel, associate the custom channel to another audience.

     > **Note:** It may take several minutes for the channel to display in the library and in search results.

Hide journeys

When you hide journeys, you are only hiding the journey from learners when they browse or search. Learners can still discover individual content items that exist in a hidden journey when they search. This is so you can create a copy of a Skillsoft Aspire journey then customize it and learners can still access the content. You can then hide the original Skillsoft Aspire journey so learners only see your custom journey.

To hide an Aspire or custom journey

You might choose to hide a Skillsoft Aspire Journey, if you made a copy of it so you could add content in other languages. This procedure hides the entire journey from your learners.

1. Using the library or search, browse to the journey you want to hide.
2. In the journey header, click ⋮ > Hide.
3. Click **Hide** in the dialog box to confirm you want to hide the journey. The Manage Hidden Content list displays, updated with the journey you hid, and the journey is no longer available to learners.

Show hidden channels

To show a hidden Skillsoft or custom channel

There are two ways you can show a hidden channel.

To show a hidden channel from the Manage Hidden Content page

1. From the Admin menu, select **CONTENT > Manage Hidden Content** page.
2. Locate the channel you want to show to your learners.
3. Click ⋮ > **Make visible**.
4. Click **Show** in the dialog box to confirm you want to show the channel to learners.

   The list updates, with the selected channel removed from the list, and the channel is immediately available to learners.

To show a hidden channel from the Custom Channels page

1. From the Admin menu, select **CONTENT > Custom Channels** page.

2. Locate the channel you want to show to your learners. Hidden channels are marked with an eye icon.
3. Click ⋮ > **Make visible**.
4. Click **Show** in the dialog box to confirm you want to show the channel to learners.

To show a hidden custom channel view

1. From the Admin menu, select **CONTENT** > **Channels**. The Custom Channels page displays.
2. Locate the multi-view channel.
3. Click the channel name to open it.
4. In the channel header, choose your selections to display the hidden channel view.
5. Click **Show this view to learners**. The page refreshes and the channel content displays.
6. Select one of the available actions:
   - **Save and close**: Saves your changes for modification or publication later, and places your channel into a **Draft** status. You can then associate the custom channel to an audience.
   - **Publish**: Publishes your channel to Percipio, and places your channel into a **Published** status. By default, the custom channel is associated to the **All Users** audience. If you do not want all users in your organization to access the content within your custom channel, associate the custom channel to another audience.

> **Note:** It may take several minutes for the channel to display in the library and in search results.

Show hidden journeys

To show a hidden Aspire or custom journey

There are two ways you can show a hidden journey.

To show a hidden journey from the Manage Hidden Content page

1. From the Admin menu, click **CONTENT > Manage Hidden Content** page.
2. Locate the journey you want to show to your learners.
3. Click ⋮ > 👁 **Make visible**.
4. Click **Show** in the dialog box to confirm you want to show the journey to learners.

   The list displays, with the selected journey removed from the list, and the journey is immediately available to learners.

To show a hidden channel from the Custom Journeys page

1. From the Admin menu, click **CONTENT > Journeys** page.
2. Locate the journey you want to show to your learners. Hidden journeys are marked with an eye icon.
3. Click ⋮ > 👁 **Make visible**.
4. Click **Show** in the dialog box to confirm you want to show the journey to learners.

Retire a Custom Channel

Retiring a custom channel removes it from the library and it is no longer available to learners.

To retire a custom channel

1. From the Admin menu, select **CONTENT** > **Custom Channels**. The Custom Channels page displays.
2. Locate the custom channel you wish to retire.
3. Click ⋮ > **Retire**.
4. In the confirmation message, click **Retire**.

   The channel retires immediately and is no longer accessible to learners. Retiring a channel cannot be undone, and you cannot copy a retired channel.

Custom Content Items

You can add custom content items to customize the Percipio experience for your organization. Prior to working with custom content, review the Custom Content Best Practices documentation.

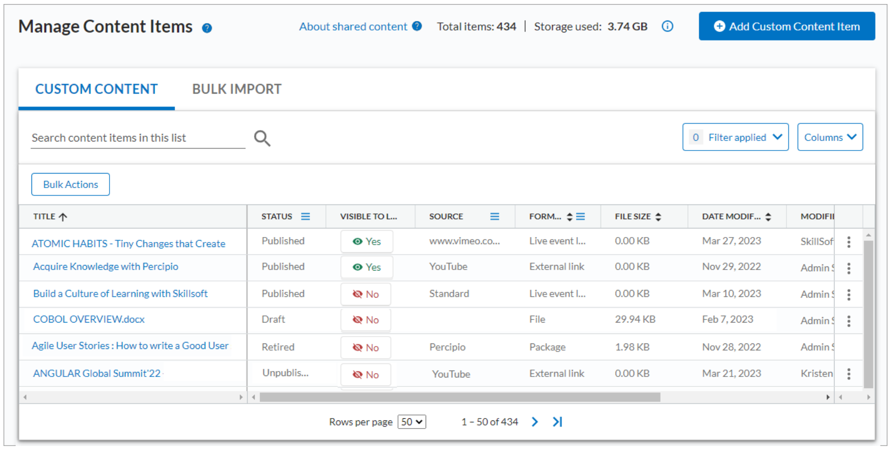
Note: If you plan to use Percipio for custom content only, your learners still require access to at least one Skillsoft license pool before they can see your custom content.

This page contains the following sections:

- Get started with custom content
- Types of custom content
- Process for adding custom content

Get started with custom content

To access custom content, from the **Content** menu, select **Content items**. The Manage Content page displays.



At the top you see the total number of items you added and the amount of storage they consume. You have up to 200 GB of storage space included with your contract. We ask that you please monitor your use of storage space because if you do exceed 200 GB, Skillsoft charges you a price per GB as outlined in your contract.

The page also shows up to two tabs, **Custom Content** and **Bulk Import**.

- **Custom Content** tab displays a list of all custom content items you added to Percipio including those made through bulk import. You can check the status of an item and see whether it is visible to learners. You also have the option to download the item for local storage, or edit and view an item's details.

  For each published item, you can retire it so learners can no longer find it. For draft items, you can preview its card, publish it, and delete it if no longer relevant.

- **Bulk Import**tab displays any bulk imports you did. It shows how many items were added, how many failed and how many were added to channels. You have the option to download the validation report and see the details of the validation. Any item added or updated through bulk import shows as an individual item on the **Custom Content** tab and can be manually viewed and updated on that tab.

To get started adding content, select **Add custom content item**. Percipio steps you through the process for adding a single item or for bulk importing many linked content items.

Types of custom content

All custom content types can display for learners who use mobile devices if you select the devices during individual custom content setup.

- Hosted custom content are files you create outside of Percipio, then upload and store them within Percipio. Percipio accepts the following types of files (see the full list):

        - Standards-based packages such as SCORM and AICC are packaged as .zip files. You can upload these .zip files and, once you add them to a custom channel or journey, your learners can access them.

          IMPORTANT: Flash-based courses will not play after December 31, 2020 when all browsers no longer support Flash.

        - Single files include documents such PowerPoint presentations, Excel spreadsheets, and Word documents, as well as audio formats and video files. You can upload these files and, once you add them to a custom channel or journey, your learners can access them.
        - Web pages include .htm or .html files, and website pages and files packaged as a .zip file. You can upload these files and, once you add them to a custom channel or journey, your learners can access them.
    - External links are links to content that do not require a license and are hosted outside of Percipio. These links can be to content such as YouTube videos, TED Talks, blogs, white papers, articles, and more. Once you add the links to a custom channel or journey, your learners can access them.
    - Live event links are links to virtual meetings or webinars that are hosted outside of Percipio. Once you add the links to a custom channel or journey, your learners can access them, you can promote them on the home page, and assign them.

Process for adding custom content

For learners to view the custom content you add to Percipio, the custom content item must be published **and** added to a custom channel or custom journey that is also published to a subject and area.

Step One: Add custom content item

Add your custom content item to Percipio. See the following for how to add each content item:

- Standards-based packages
- Single files
- Web files
- External links
- Live event links

Step Two: Add the content item to a channel or journey

The process is slightly different for each type of content item and whether you are adding the content type to an existing channel, journey, subject and area or a new one.

- Follow these steps to ensure that your standards-based packages show to learners:

  To make standards-based package content available to learners (via a new area/subject and new channel or journey)

  1. Review the Custom Content Best Practices documentation.
  2. Upload your SCORM or AICC package to Percipio. If your content is taking a while to upload, you can perform other tasks in Percipio as long as you leave the browser window open. If you close the browser window, the upload stops.
  3. Edit the package details so learners in finding your content. Percipio guides you through configuring the details.

4. Publish your package to Percipio's server.

   > **Note:** Publishing custom content at this point in the workflow publishes it to the Percipio server. Custom content is not yet available to learners at this point.

5. Create a new custom area for your library.
6. Create a new custom subject for your custom area.
7. Create a new custom channel or custom journey.

   On the Create Channel or Create Journey pages, ensure you select the custom area/custom subject you created in steps 5 and 6 from the **Subject** drop-down list.

8. Publish your custom channel or custom journey.

   > **Note:** Once you publish the custom channel or journey, the custom content you've placed within it is now available to your learners.

To make standards-based package content available to learners (via an existing area/subject and channel or journey)

1. Review the Custom Content Best Practices documentation.
2. Upload your SCORM or AICC package to Percipio.
3. Edit the package details to aid your learners in the discovery of your content.

4. Publish your content to Percipio's server.

   > **Note:** Publishing custom content at this point in the workflow publishes it to the Percipio servers. Custom content is not yet available to your learners.

5. Add your content to an existing channel or journey.
6. Publish your custom channel or journey.

   > **Note:** Once you publish the custom channel or journey to your library, the custom content within it is now discoverable by your learners.

- Follow these steps to ensure your single files show to learners:

  To make single files available to learners (via a new area/subject and new channel)

  1. Review the Custom Content Best Practices documentation.
  2. Upload your single file to Percipio.
  3. Edit the file details to aid your learners in the discovery of your content.
  4. Publish your content to Percipio.

     > **Note:** Publishing custom content at this point in the workflow publishes it within Percipio for the purpose of admin-only search. Custom

content is not yet available to learners at this point.

5. Create a new custom area for your library.
6. Create a new custom subject for your custom area.
7. Create a new custom channel or custom journey.

   During this process, on the Create Channel or Create Journey page, ensure you select the custom area/custom subject you created in steps 5 and 6 from the **Subject** drop-down list.
8. Add your file to your custom channel or custom journey.
9. Publish your custom channel or custom journey.

   Note: Once you publish the custom channel or journey, the custom content you've placed within it is now available to your learners.

To make single files available to learners (via an existing area/subject and channel or journey)

1. Review the Custom Content Best Practices documentation.
2. Upload your single file to Percipio.
3. Edit the file details to aid your learners in finding your content.
4. Publish your content to Percipio.

> **Note:** Publishing custom content at this point in the workflow publishes it to Percipio servers. Custom content is not yet available to your learners.

5. Add your content to an existing channel or an existing journey.
6. Republish your custom channel or custom journey.

> **Note:** Once you republish the custom channel or journey to your library, the custom content within it is now discoverable by your learners.

- Follow these steps to ensure your external links show to learners:

  To make an external link available to learners (via a new area/subject and new channel or journey)

  1. Review the Custom Content Best Practices documentation.
  2. Create a new custom area for your library.
  3. Create a new custom subject for your custom area.
  4. Create a new custom channel or custom journey.

     During this process, on the Create Channel or Create Journey page, ensure you select the custom area and custom subject you created in steps 2 and 3 from the **Subject** drop-down list.

5. Search, then add your external link to the channel or journey. External links display as their own content card within a channel or journey.

   > Note: When creating a custom channel, you have the option to create a new external link during the add content step.

6. Publish your custom channel or journey. This publishes your channel or journey (and its contents) to the Percipio library.
7. > Note: Once you publish the custom channel to your library, the custom content within it is now discoverable by your learners.

To make an external link available to learners (via an existing area/subject and channel)

1. Review the Custom Content Best Practices documentation.
2. On the Custom Channels or Custom Journey page, locate the channel or journey where you want to add your external link.
3. Click the channel name, or click ⋮ > **Edit**.
4. Search, then add your external link to the channel or journey. External links display as their own content card within a channel or journey.

Note: When editing a custom channel, you have the option to create a new external link during the add content step.

5. Publish your custom channel or journey. This publishes your channel or journey (and its contents) to the Percipio library.

6. Note: Once you publish the custom channel or journey to your library, the custom content within it is now discoverable by your learners.

- Follow these steps to ensure your live event links show to learners:

  To make a live event link available to learners (via a new area/subject and new channel or journey)

  1. Review the Custom Content Best Practices documentation.
  2. Create a new custom area for your library.
  3. Create a new custom subject for your custom area.
  4. Create a new custom channel or custom journey.

     During this process, on the Create Channel or Create Journey page, ensure you select the custom area and custom subject you created in steps 2 and 3 from the **Subject** drop-down list.
  5. Search, then add your previously created live event link to the channel or journey. Live event links display as their own content card within a channel or journey.

6. Publish your custom channel or journey. This publishes your channel or journey (and its contents) to the Percipio library.

   > Note: Once you publish the custom channel to your library, the custom content within it is now discoverable by your learners.

To make a live event link available to learners (via an existing area/subject and channel)

1. Review the Custom Content Best Practices documentation.
2. On the Custom Channels or Custom Journey page, locate the channel or journey where you want to add your live event link.
3. Select the channel name, or select ⋮ > **Edit**.
4. Search, then add your live event link to the channel or journey. Live event links display as their own content card within a channel or journey.
5. Publish your custom channel or journey. This publishes your channel or journey (and its contents) to the Percipio library.

   > Note: Once you publish the custom channel or journey to your library, the custom content within it is now discoverable by your learners.

Custom Content File Types

You can upload, manage, and publish up to 200 GB of your standards-based and single-file content with Percipio.

> **Note:** Learners cannot restart custom courses you add to Percipio

Storage

Depending on your contract, your organization has a certain amount of free storage for storing standards-based packages (such as SCORM and AICC) and single files (such as .pdf and .doc).

Additional fees apply when your total file storage exceeds this amount. For questions regarding these fees, additional storage, or your overall contract, contact your Skillsoft representative.

When you upload a .zip file (containing either standards-based content or web files), the .zip file itself must be 2 GB or less. However, when Percipio unpacks the .zip file, each file within the zip has its own size (in kb or GB). The total amount of storage used once all files within the .zip file are uploaded into Percipio varies based on the total file size of the unpacked files.

Standards-based content

Percipio supports the following standards-based packages when they are compressed as a single .zip file. Each uploaded file cannot exceed 2 GB, and both single-SCO and multi-SCO packages are supported.

> **Note:** For the most up-to-date guidance and best practices when creating these packages, see the Rustici Knowledge Base: Standards documentation.

Supported standards-based content includes:

- SCORM 1.1
- SCORM 1.2
- SCORM 2004 (1st, 2nd, 3rd, and 4th editions)
- AICC

IMPORTANT: Flash-based courses will not play after December 31, 2020 when all browsers no longer support Flash.

Single file types

Percipio supports the upload of single files.

Note: Except for PDFs, all files download directly to your learner's machine. If you do not want your learners to have to download each file, there are browser-specific extensions generally available that open files in new tabs or windows, instead of downloading them. For more information, see your web browser's support documentation.

PDF files always open in a new browser tab.

Percipio supports the following single file types:

Documents (up to 2 GB each upload)

- .doc/.docx
- .xls/.xslx
- .ppt/.pptx
- .pps/.ppsx
- .pdf

Media (up to 2 GB each upload)

- .mp3
- .mp4
- .mov

Images (up to 300 kb each upload)

- .png
- .jpg
- .gif
- .tif
- .bmp

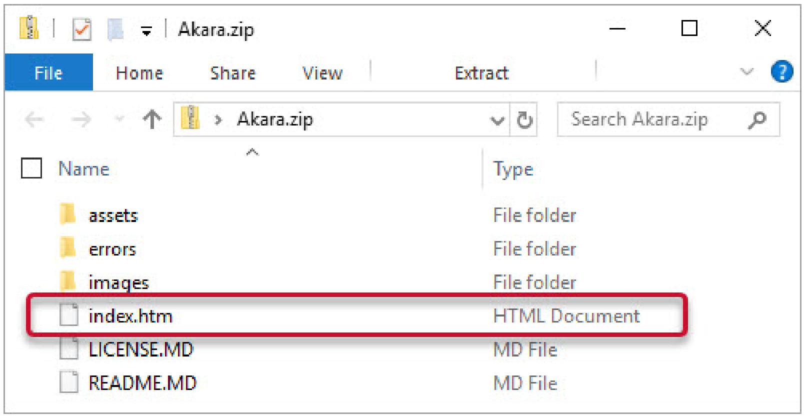
Web pages

Percipio supports the upload of .htm and .html files, as well as website support files included within a .zip file.

> **Note:** If you have any executable file types (for example .exe, .bat, or .com) within your .zip file, that executable is not copied to Percipio's servers.

Start/home page

If you upload a .zip file that contains multiple files for a website, Percipio automatically selects a home page to display when your learners launch it. Percipio looks for a root-level .htm or .html file named `index`, `default`, or `home`.



All other website files are supported within a .zip file; the list below includes most, but not all, supported file types.

Note: At this time, you cannot have a .zip file within a .zip file.

Supported web file types

Web file types (up to 2 GB each)

- .htm
- .html

Microsoft file types (up to 2 GB total for the .zip file in which they are contained)

In addition to the standard supported files, the following file extensions are acceptable within a zip file for web page upload:

- Microsoft Access files: .accda, .accdb, .accde, .accdt, .ade, .adn, .adp, .mdb, .mde, .mdf, .mdn, .mdt, .mdw
- Microsoft Excel files: .xla, .xlam, .xlsb,. xlsm, .xlt, xltm, xltx, xlw
- Microsoft PowerPoint presentation files: .potm, .potx, .ppa, .ppam, .pps, .ppsm, ppt, pptm, .pptx
- Microsoft Word files: .docm, .dotc, .w6w, .word

Additional file types (up to 2 GB total for the .zip file in which they are contained)

.abs	.gtar	.ogv	.src
.ai	.gz	.ogx	.sv4cpio
.aif, .aiff	.hdf	.opf	.svg
.aim	.hlp	.otf	.swf
.anx	.hqx	.pbm	.tar, .tar.gz, .tgz
.art	.ief	.pct	.tcl
.asf	.jar	.pgm	.tex, .texi, .texinfo
.asx	.js	.pic	.thmx
.au	.kar	.pict	.tiff
.avi, .avx	.latex	.pl	.tsv
.axa, .axv	.m3u	.pnm	.ttf
.bcpio	.mac	.pnt	.txt
.bin	.mht, .mhtml	.ppm	.ulw
.bz2	.md	.ps	.ustar
.calcx	.mid, .midi	.psd	.vsd
.cdf	.mif	.qt, .qti, .qtif	.vtt
.cer	.movie	.ra, .ram	.wav
.class	.mp1, .mp2	.ras	.wbmp
.cpio	.mps	.rdf	.wmlc, .wmlcscriptc
.csh	.mpe, .mpeg, .mpega	.rgb	.wmv
.css	.mpg	.rm	.wri
.dib	.mpp	.rtf	.xbm
.dotx	.mpv2	.sgml	.xlf
.dtd	.ms	.sh	.xml
.dv, .dvi	.nc	.shar	.xpm
.eps	.ncx	.sit	.xwd
.epub	.oda	.sldx	.z
.es	.oga	.snd	.zip, .zipx
.flac	.ogg	.spx	

Custom Content Best Practices

Before learners can see any custom content, you must ensure they are a member of an audience that has been associated to at least one license pool.

To ensure your custom content provides your users with a positive user experience, Skillsoft suggests that you:

- Follow the content visibility rules.
- Manage your content effectively.
- Manage your images effectively.
- Review Skillsoft's curation practices.

Unless otherwise stated, all behaviors apply to both the Percipio web and mobile experiences.

Content Visibility Rules

When creating your custom content and custom channels, you must ensure your learners can access them.

> **Note:** If you plan to use Percipio for custom content only, your learners still require access to at least one Skillsoft license pool before they can see your custom content.

Each type of content (custom and stock) has its own set of visibility rules:

- Custom content
- Custom channels
- Skillsoft content
- Percipio library: areas and subjects

> **Note:** There may be a delay in learners being able to see content you publish. Most content is available within 10 minutes, but it could take longer depending on back end processes.

Custom content

External links do not require a license and are hosted outside of Percipio. See Create an External Link for details about how to create external links.

Hosted custom content (such as standards-based packages and single files) are hosted inside of Percipio. See Custom Content File Types for details about the types of files you can add to Percipio.

Live event links: are links to virtual meetings or webinars that are hosted outside of Percipio. See Create live event links for details on how to create live event links.

> **Note:** For the most up-to-date guidance and best practices when creating these packages, see the Rustici Knowledge Base: Standards documentation.

To ensure that any user (learners and admins) can find your custom content, all the following must be true:

- The content item does not require Flash.
- The content item is published.
- The content item is curated into a custom channel or custom journey.
- The custom channel or journey is published.

The Manage Content page indicates whether learners can see an item. From the **Content** menu, select **Content items**, then click the Yes or No button in the **Visible to Learners** column for details.

Custom channels

To create your own custom channels, see Custom Channels.

> **Note:** Learners can only see a custom channel if they are part of an audience that has been associated with a license pool.

- A custom channel is built specifically for your organization.
- A custom channel can include:
  - only custom linked content
  - only stock content
  - a combination of custom linked content and stock content.
- Content within a custom channel displays as a list of assets, with a separate tab for each modality (Watch, Read, Listen, and Practice).
- To ensure a positive user experience, Skillsoft recommends custom channels contain no more than 10 assets.
- You can feature a custom channel on the Percipio home page in either a banner or strip promotion.

Skillsoft content

Skillsoft content is the content included in the various Skillsoft content collections. To ensure a learner can see a Skillsoft content item, the following must be true:

- The collection is available to your organization via a license pool.
- The learner is entitled to the content in the license pool via an audience association.
- The content is not excluded.
- The content, channel, or journey is not hidden.

- The content item is curated into a channel.
- The channel is published.

If any of these pre-conditions are not met, your users may not see the content in the custom channel. To avoid this, ensure that all targeted users for the custom channel have appropriate licenses to all Skillsoft content.

Percipio library: areas and subjects

> **Note:** The Percipio library is sorted by area and subject.

- A **subject** is visible to users if they are entitled to at least one content item in the subject.
- An **area** is visible to users if they are entitled to at least one subject in the area.
- Users can access custom channels via the library or search.

Content Management

Each aspect of custom content has its own set of guidelines. This page contains guidelines for the following:

- Custom channels
- Custom content (hosted content and links)
- Tracking and reporting
- Assignments and audiences

Custom channels

When working with custom channels, there are two areas to focus on - **content selection** and **channel creation**.

Content selection

- How much and what type of content should be included?
- What content is already available?

  Locate existing stock and custom content using search, or browse the available channels.

- What external sources of content are available?

  Use the linked custom content feature to bring these into your custom channels.

Channel creation

- How many custom channels should be created?
- Do existing channels already cover these topics?
- Channel descriptions need to be accurate for the content within.

Custom content (hosted content and links)

- Descriptions and metadata are used within the search function of Percipio.
  - Include descriptions that enable the search functionality to find the content.
- If content is hosted outside of Percipio, ensure the content hosting service is stable.
- Verify that all potential users have access to the content wherever it resides.
- Ensure that your naming conventions for the content type (such as Video, Course, etc.) and source (such as vendor, department, speaker, etc.) are consistent (including spacing and capitalization).

    - For example, "job-aid," "Job Aid," and "job aid" are treated as 3 separate content types.
- Always include the duration in hours, minutes, seconds (they display in hours and minutes in Percipio).
    - For video or audio content, the duration is the length of the video or audio content.
    - For text, use the standard book calculation of 300 words per minute.

Custom content completion criteria

Single-SCO courses

Completion criteria for single-SCO courses is included within the course package. We recommend you author single-SCO courses so that full control of completion can be managed by the course itself.

Multi-SCO courses

Completion criteria for multi-SCO courses can be managed in Percipio. See Edit a Package's Content Player Behavior to view how the completion behaviors of each topic roll up in the course completion.

Tracking and reporting

- Currently, the tracking for external links is the launch of the item, or a self-reported completion of the link. If the Learning time entry setting is turned on, learners can also specify the time they spent learning.
- Currently, the only tracking for custom channels is the launch of the channel and the assets within.
- If your external link consists of trackable content, that tracking is outside of Percipio (in the system where the content is hosted).
- If your content is hosted within Percipio, progress is tracked and available to learners via the Activity page, and to admins via reports and dashboards.

Assignments and audiences

- You can associate a custom channel to an audience, so only that audience can see it and its content.
- You cannot assign a custom channel to an individual or an audience.
- Although you cannot assign custom channels, the channel can be accessed by a URL, so it can be promoted via email and other means available to your organization.

Image Management

Manage your custom content images using these guidelines.

Custom channel

- Channel images must be uploaded to Percipio in a 16x9 aspect ratio.
- The recommended size for the image is 1920 x 1080px with a file size of no more than 300k.
- The channel image is used in multiple locations throughout Percipio and the Percipio mobile app.

Custom content

Content images can be uploaded to Percipio.

- Recommended specifications for content images:
  - Images should be in a 16x9 aspect ratio.
  - The recommended size for the image is 1920 x 1080px.
  - The file size must be 300k or less.

Curation Best Practices

The Skillsoft Curation Team has put together a list of curation best practices used within our own content. There are four main areas to focus on - planning, building, content discoverability, and iterating and improving.

Planning

Understand the difference between aggregation and curation.

- **Content aggregation** is information collection based on a common topic, using one or more related keywords.
  - Historically, content providers have done well at content aggregation.
- **Content curation** is the collection, organization, and online presentation of content related to a particular theme or topic.
  - Content curation helps users make decisions that give them exactly what they need in a concise delivery method.

Establish a mission statement or scope statement dependent upon the scale of the curation project.

- Key components should include (but are not limited to) business objective, time line, resourcing, and, most importantly, success metrics.
- Treat curation like a project with specific deliverables, and determine a way to measure success.

Consider the audience. Who are the learners, and what are their roles? How much time do they have and how do they prefer to learn?

- Determine the types of content the target user needs/wants, their prerequisite knowledge, and the modalities that work best for them.
- The key is to curate content in a way that meets the needs of the target audience, but also to not overwhelm the user.

Building

Think about the structure of what you curate and the logical order in which content should be consumed.

- You can use various consumption methods (weekly goals or assignments), or think about proficiency levels (transitioning a learner from beginner to expert).
- Think about the flow of content and keeping users engaged.
- Provide choices and options when possible.
- Consider the appropriate amount and types of assets – you don't want to overwhelm a learner but you also do not want to provide insufficient resources.
- Understand how any assessments will be applied. Are you testing that the learner completed the assignments and can apply their new skills?

Content discoverability

Having appropriate metadata for all content is critical.

- Consider factors such as expertise level, topic areas, competencies, skills, and content length/duration
- These factors improve the discoverability of content through search results, defining relationships between assets, and providing recommendations to learner based on similar topics or other similar learners.
- This important data can also help learners know if the content they are consuming is appropriate for them.

Iterating and improving

Learn and iterate constantly.

- Repeat the process above as part of continuous improvement. What was the impact and did it meet your expectations? Are there any additional improvements to recommend?
- Your first curation model may change or evolve over time. Don't think that you curate once and it is set forever.
- Your curation model needs to be maintained, bugs need to be addressed, and new features or components need to be added.
- Continually revisit your curation to ensure it is up-to-date and efficient.

Curation needs to be dynamic and evolve, but it is also important to establish governance and rules around how curation is iterated.

- Establish criteria for the frequency of updates, the types of updates, and how that is communicated. These lead to the success of the program.
- Ask the following questions:
  - How can the model be expanded? Consider new topics and content assets to keep things fresh and relevant.
  - How is new content added or other content removed?
  - What is the process for adding new modalities?

Analyze metrics and various sources of feedback.

- Use metrics to measure success and study usage patterns. When possible, obtain user feedback.
- Collect and review learner and stakeholder feedback regularly to address challenges and plan new features or processes. Possible methods for gathering this feedback includes:
  - Surveys
  - Advisory panels
  - A/B testing

Standards-based Packages

SCORM (Shareable Content Object Reference Model) is a collection of technical standards and specifications for eLearning products. SCORM defines how content can be packaged into a transferable .zip file, and it governs how online learning content and a Learning Management System (an LMS) communicate.

AICC (Aviation Industry Computer-Based Training Committee) is a collection of nine guidelines and recommendations; to be AICC-compliant, your content needs to follow one or more of them. The AICC specification is no longer maintained or updated, but it is still widely used in eLearning.

IMPORTANT: Flash-based courses will not play after December 31, 2020 when all browsers no longer support Flash.

Upload a SCORM or AICC Package

Percipio supports SCORM 1.1, SCORM 1.2, SCORM 2004 (1st, 2nd, 3rd, and 4th editions), and AICC packages when they are compressed as a single .zip file. Each uploaded file cannot exceed 1 GB, and both single-SCO and multi-SCO packages are supported.

> **Note:** For the most up-to-date guidance and best practices when creating these packages, see the Rustici Knowledge Base: Standards documentation.

To upload a SCORM or AICC package

1. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
2. Click **Add Custom Content Item**.
3. Click **Upload package(s)**. The Upload Package page displays.
4. Click **Browse** to locate your package, or drag and drop the package .zip file onto the page. The upload begins immediately.
5. Once the upload completes, you can either:
    - edit the SCORM or AICC package details, or
    - make your content available to learners by adding the custom content to a custom channel.

Edit the SCORM or AICC Package Details

You can edit the Percipio-specific details of your SCORM or AICC package. Here, you can add details to aid your learners in the discovery of your content, and specify the package's content player behaviors.

> **Note:** On-screen fields marked with * are required.

1. **Navigate to the hosted custom content.**
    a. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
    b. Locate the content in the list.

c. Click the title, or click the More Actions icon ⋮, then click > **Edit**. The Edit Custom Content page displays.

2. On the Edit Custom Content page, the **Title** may be automatically generated from the content. You can edit this field if necessary.
3. The **Description** may be automatically generated from the content. You can edit this field if necessary .
4. Choose a background image.
   - Images should be in a 16x9 aspect ratio.
   - The recommended size for the image is 1920 x 1080px.
   - The file size must be 300k or less.
5. Select the **content language**.
6. Specify content completion criteria:
   - For **single files, web pages**, and **external links** select one of the following completion options:
     - **The learner opens it:** Once the learner launches the link, Percipio marks it as complete and places the status to **Completed** on the learner's Activity page.
     - **The learner marks it as complete:** Once the learner launches the link, they can mark the content as complete using the **Mark as completed** option from the content card while viewing the card from a channel or journey or from Activity page. If the learner views the content from search results, they do not see the Mark as complete option and must choose to mark the item complete from their Activity page.
     - If the Learning time entry setting is selected for your site, learners can also add the amount of time they spend learning

for this item. The time they enter is tracked in their learning activity and counts towards their learning goals. Learners can enter their time from the More actions menu on a content card or from the Activity page.

    - In some cases, like YouTube, tracking and completions options are included with the link.

  - For **SCORM** and **AICC** packages, Percipio uses the completion criteria specified in the course package.
  - For **YouTube** links, .mp3, and .mp4 files Percipio assumes completion after the user watches at least 50% of the video or listens to at least 50% of the audio file.

7. If you uploaded a SCORM or AICC package, optionally edit the package's content player behavior.
8. Select **Next: Add content discovery details** to continue making edits, or select **Save unpublished changes** to return at a later date.
9. Select your **modality**.

   Choose the learning style that best fits your content to determine how it is categorized within Percipio.

   - **Watch**: usually a video or course
   - **Read**: usually an e-book, article, or blog post
   - **Listen**: usually an audio book
   - **Practice**: usually resources that can be edited for a user's purpose, such as Microsoft Word or Excel documents

10. Select a **Content type**. Content type is a universally recognized classification that defines how the content will be consumed by the learner. Skillsoft uses the types: videos, courses, labs, live events, books, audio books, etc. We suggest you use these as a starting point, but also define

some of your own such as web articles, presentations, and quarterly meetings.

There is a default selection but you can select a different type from the drop-down or enter a new value. We suggest you use the type ahead feature to avoid replicating an existing entry. You do not want to have two or three entries for the same item; one with title-case, one with all lowercase, a one-word entry, a two-word entry, or a hyphenated word would all be considered different types.

A couple of notes about **Content type**:

- When adding an external link, we recommend that you do not specify the Content type as **link** because it does not give the user any idea what kind of content it is. Is it a link to a video, document, or some interactive website?
- When adding a SCORM/AICC course we recommend that you keep the Content type as **course** so learners can receive completion certificates, if enabled on your site. If you change the Content type to something other than **course** for a SCORM/AICC course, learners can't receive a completion certificate.

11. Select a **content source** from the list or enter a new value. We suggest you use the type ahead feature to avoid replicating an existing entry.

    Content Source is who owns the intellectual property; it is not the platform where the item resides, such as YouTube or SharePoint. Skillsoft uses source to distinguish brands and partner content like Wintellect and GoFluent.

    > **Note**: Content source is a required field. If you are editing a previously created content item and did not specify a content source at the time of creation, Percipio populates the field with the Organization Name.

12. Enter a **recommended duration**.

    This displays on the content card. The duration is the average amount of time your learner can expect to engage with the content. To estimate books and content, use the average of 300 words per minute. If adding a video file, use the actual duration of the video.

13. To ensure the best experience, select the **device(s) for which your content is optimized**. When learners attempt to access this content on a device not selected here (an “unsupported device”), a message directs them to access the content on the selected (“supported”) device(s).

14. Optionally, select or enter a new **expertise level**, **technology title**, **technology version**, and **additional search terms**.

15. Optionally, enter an **external ID**. This is a unique identifier you can use to search for your custom content in Percipio Admin. The external ID does not display to learners in any search results or content cards.

16. Select one of the following actions:

    - **Cancel**: Discard all changes.
    - **Save as Draft**: Save your changes for modification or publication later.
    - **Next: Review content details**: Progress to the final stage to review your settings and publish.

17. Review the details of your custom content. Select to edit any details if necessary, then choose one of the following actions:

    - **Cancel**: Discard all changes.
    - **Save as Draft**: Save your changes for modification or publication later.
    - **Next: Publish Content**: Publish the content to a Percipio server so that you can add it to a channel or journey.

18. Select to **Publish** your content or **Save as draft** for editing at a later date.

> **Note:** Publishing your content places it on the Percipio server. It is not yet available to your learners; to make it available to them, it must be added to a custom channel or journey.

19. **Add published custom content item to a custom channel or journey.**

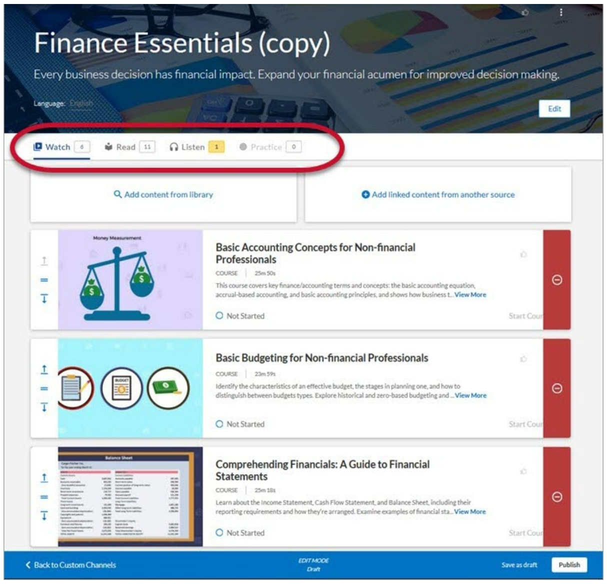
    To add the item to a journey, see Editing a Journey. To add to a custom channel follow these steps:

    a. On the **CONTENT > Custom Channels** page, click the name of the channel to which you want to add the custom content. The Edit Channel page displays.
    b. Select **Add content from library**.
    c. Enter item's title.
    d. Select .

    > **Note:** If you recently published your item to Percipio's server, it may take several minutes to display in your search results.

    a. Locate the item and click to add it to the channel.
    b. Select **Done** to save the channel.

The number of assets in each modality updates in yellow. To see the newly-added item, click the appropriate modality tab.



c. Select **Publish** to publish the channel to Percipio.

   Learners can now find your custom content in the library or by searching.

You can only add published custom content to a custom channel.

Edit a Package's Content Player Behavior

By default, the content player launches in a new browser (pop-up) window using default settings. You can configure the player's launch behavior, apply advanced navigation settings, and configure your content's scoring and completion settings.

> **Note:** Custom content player settings are specific only to the package you are editing. Changes made to these settings do not save for later use; instead, they can only be published.

The default behavior for the content player includes allowing window resizing, and browser window dimensions of 1012 x 705.

To edit the content player behavior

1. **Navigate to the hosted custom content.**

    a. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.

    b. Locate the content in the list.

    c. Click the title, or click the More Actions icon, then click > **Edit**. The Edit Custom Content page displays.

2. Near the bottom of the Edit Custom Content page for the **Describe Your Content** step, expand the **Modify default content player behaviors (optional)** section and select how content launches and specify settings if applicable:

    - **Content launches in a new browser tab:** when selected, the course player launches in a new browser tab. Use this option if pop-up blockers prevent custom courses from launching. Selecting this option does not allow you to specify window resizing or toolbar options.

    - **Content launches in a pop up window:** Selected by default, launches the course player in a pop up window. You can specify the following settings:

        - **Show browser toolbar**: You can hide or show the toolbar in the browser where your content plays.

            - Check to give users access to their browser toolbar.

            - Leave unchecked to remove the browser toolbar.

- **Full screen:** Select to open the content player in a full-screen browser window.
- **Specify dimensions:** Select to open the content player in a specific window size, and specify your window dimensions in the **Width** and **Height** fields.

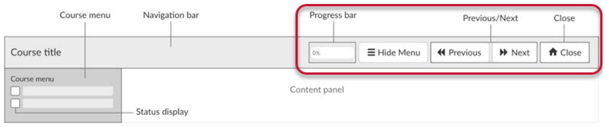
To edit the advanced player configurations (multi-SCO packages only)

If your package is multi-SCO, you can edit the player configurations. We recommend only changing these settings if necessary.

1. From the Edit Custom Content page for the **Describe Your Content** step, expand the **Modify default content player behaviors (optional)** section and click **Advanced navigation and scoring configurations (optional)**.
2. Click **Edit advanced configurations**.
3. **Modify the navigation controls.**

> **Note:** If your course package already contains navigation and you enable these controls, your learners will see two sets of navigation when the course launches. If your package contains navigation controls, leave **Show Navigation bar** unchecked.

- **Show Navigation bar** displays available options for the Percipio course player navigation controls.



  - Check to display the navigation bar. Only check this option if your package does not already contain navigation.
    When checked, select the options you want to display (Close button, Previous/Next, buttons, Progress bar, and Course title).
  - Leave unchecked to hide the Percipio course player navigation controls.
- **Prevent right-click within player** gives learners the option to open the browser's right-click menu.
  - Check to prevent the right-click menu from displaying in the player window.
  - Leave unchecked to allow the right-click menu to display in the player window.
- **Show course menu to learner** displays your course menu within the player window.

  - Check to show the menu in the course player window.
  - Leave unchecked to hide the menu in the course player window.
  - **Show expanded course menu when course first loads** controls the course menu display within the player window.

        - Check to display the course menu in its entirety in the player window (as shown in image above).
        - Leave unchecked if you want to display only a **Show course menu** option in the player window.
    - **Allow learners to select from the course menu** controls the forced order of items within the player.
        - Check to allow learners to play any item in the course menu in any order they choose.
        - Leave unchecked to enforce the specific order of content.
- **Completion status and completion display settings** shows or hides the item-specific completion and success statuses next to each item in the course menu.

    - **Disabled item display setting** controls how learners who must follow the order of items can access previously-completed items in the course menu.
    - **Show and enable links** displays completed menu items in the course menu, and learners can access them.

- **Show but disable links** displays completed menu items in the course menu, but learners cannot access them.
- **Hide completely** removes the completed items from the course menu, and learners cannot access them.

4. **Modify the scoring and completion (SCORM 1.1/SCORM 1.2 only) settings.**

   Use these settings to specify how the player handles score rollups in SCORM 1.1 AND SCORM 1.2 courses.

   > **Note:** These settings do not apply to SCORM 2004 packages, as the scoring and completion behaviors are already specified via SCORM 2004 Simple Sequencing.

   a. **Score rollup method** determines which learner score to use.

   b. **Number of scoring objects** is the number of items in the package that can be scored.

   c. **Completion status rollup method** determines when to display the completion status to the learner.

   d. **Threshold score for completion** determines when the item is marked successfully completed.

5. Click **Save**. The Edit Custom Content screen displays again.
6. Click **Publish**.

Replace an Existing SCORM or AICC Package

There are three scenarios Percipio detects when you attempt to replace an existing SCORM or AICC package:

- Percipio detects only minor changes. You can replace the existing file without impacting learners completion or progress. Learners see the updates next time they start the course.
- Percipio detects major changes. You can't replace the existing file. You must add it as a new course.
- Percipio detects minor changes that might impact learners' progress or their ability to complete it properly. You can still replace the existing file.

Types of changes and impacts to learners

The types of changes you make to a SCORM or AICC package may impact what learners see when you republish. Types of changes you can make to a SCORM or AICC fall into three categories: minor, major, and minor with impact.

Minor changes, no impact

Minor changes, or non-material changes, include grammatical or spelling errors and image file updates.

If you make minor changes, Skillsoft recommends that you replace the existing course. The impact to learners is:

- Learners who started the original course see the new version when they reopen the course. The learner can start where they left off, progress is maintained.
- Learners who completed the original course can view the new version. The course remains complete.
- Learners who haven't started the course only see the new version.

Minor changes with learner impact

Minor changes that impact learners are things like a change in course identifiers or changes to the content of the course within existing topics.

If you make these types of changes, Skillsoft recommends that you retire the existing course and publish the changes as a new course. If you choose to replace the existing course with the new course, the impact to learners is:

- Learners who started the original course see the original version of the course when they open it.
- Learners who completed the original course see the original version if they open it. Their completion remains.
- Learners who did not yet start the course, see the new version when they open it.

Major changes

Major changes include those that impact the table of contents, the content organization and sequence, and going from single SCO to multi-SCO or vice versa.

If you make major changes, you can't replace your existing file.

Skillsoft recommends the following for a package with major changes:

1. Edit the existing course title by appending **Retiring soon** to the title.
2. Notify your learners that have started the course that you plan to retire the existing course and that they should complete the course to avoid losing their progress.
3. Retire the older course.

4. Upload the new package.
5. Archive existing assignments that contain the old course if you want to be able to report on assignment completions, otherwise, you can cancel the assignment.
6. Create a new assignment with the new course.

Important information about replacement file storage

Percipio supports versioning for hosted custom content packages. In an ongoing effort to ensure a positive user experience, when you replace an existing SCORM or AICC package, Percipio maintains only the most recently-uploaded package files. Previous versions of these files are cleaned up from the server to free up more storage space.

Skillsoft recommends that you download a copy of the current package files prior to replacing them.

Replace a package

1. Navigate to the hosted custom content.
   a. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
   b. Locate the package in the list.
2. Skillsoft recommends that you download a copy of the current package files prior to replacing them. Select the More Actions icon ⋮, then select **Download package** to download a copy of your source files.
3. Select the More Actions icon ⋮, then **Edit details**. The Edit Custom Content page displays.
4. At the top of the page, select **Replace file**.
5. Browse to the new file.

6. Select **Upload**.
7. Edit the package details.
8. Select **Publish**.

   The content updates in Percipio and, if it is already added to a published custom channel or journey, is immediately available to learners.

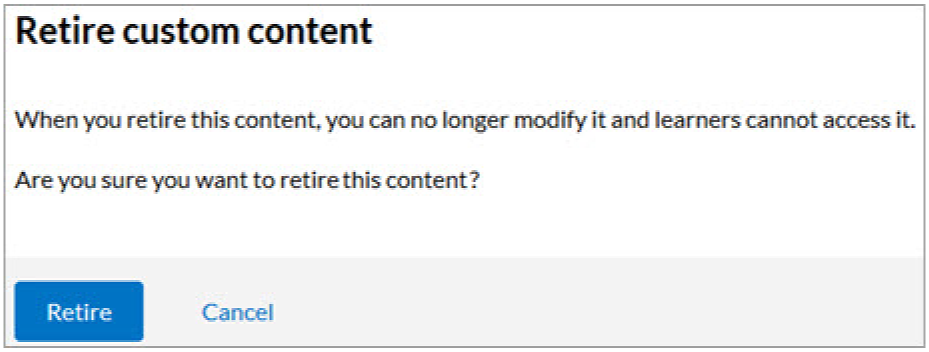
   > **Note:** If the original package was not yet added to a custom channel, the content is not yet discoverable or available to learners, and you must add the custom content to a custom channel or journey and publish it.

Retire a Hosted Package

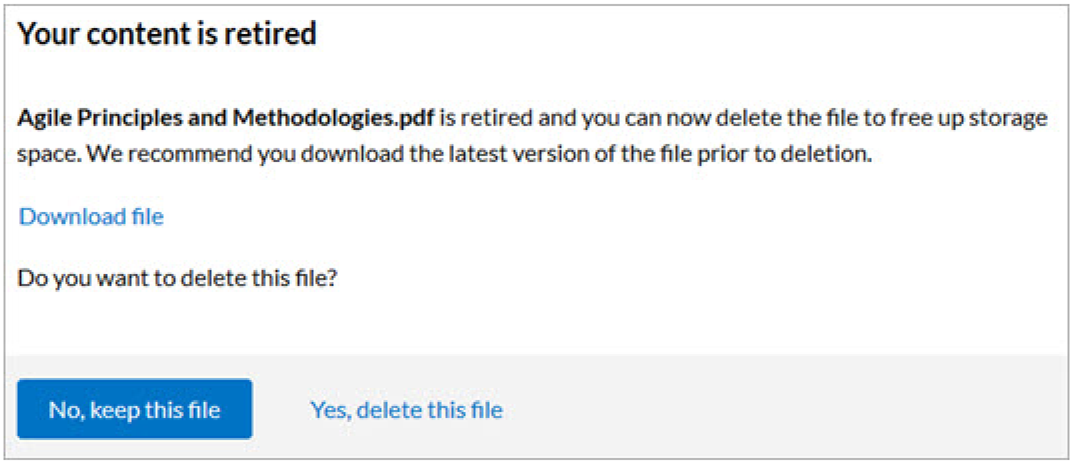
Retiring a hosted package removes it from the library, and makes it unavailable to learners.

> **Note:** Retiring content cannot be undone.

1. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
2. Locate the custom content you wish to retire.
3. Select the More Actions icon ⁝, then **Retire**. A confirmation message displays:



4. In the confirmation message, select **Retire**.The content retires immediately and is no longer accessible to learners.
5. Another message displays asking if you want to free up space.



6. Select **Download file** to save a copy of the retired content.
7. Select one of the options:
   - **No, keep this file:** Keeps the content on the server, and storage space remains unchanged.
   - **Yes, delete this file:** Removes the content from the server and frees up storage space.

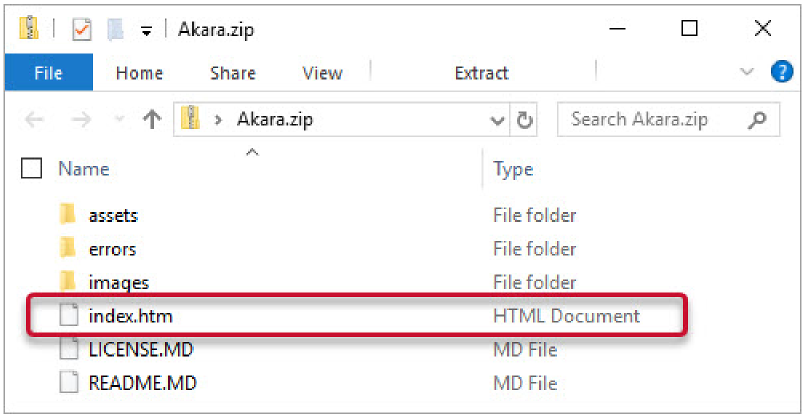
Web Files

When you upload your web pages to Percipio, you can upload a single HTML file (.html or .htm), or a .zip file that contains files to support your web pages.

> **Note:** If you have any executable file types (for example .exe, .bat, or .com) within your .zip file, those executable file types are not copied to Percipio's servers.

Start/home page

If you upload a .zip file that contains multiple files for a website, Percipio automatically selects a home page to display when your learners launch it. Percipio looks for a root-level .htm or .html file named `index`, `default`, or `home`.



If there is no file with one of those names and extensions, Percipio selects an .htm or .html file in the root folder to act as the home page. If the root folder does not contain an acceptable file, an error displays when you attempt to access it from Percipio.

Upload a Web Page

If you upload a .zip file, most file types are supported. Exceptions include executable files; if you have any executable file types (for example, .exe, .bat, or .com) within your .zip file, those are not copied to Percipio's servers. See Supported web file types for more information.

To upload a web page

1. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
2. Click **Add Custom Content Item**.
3. Click **Upload web page(s)**. The Upload web page(s) page displays.

4. Click **Browse** to locate your .htm, .html, or .zip file, or drag and drop it onto the page. The upload begins immediately.
5. Once the upload completes, you can either:
   - edit the web page details, or
   - click **Publish**, then make your content available to learners by adding the custom content to a custom channel.

Edit a Web Page's Details

You can edit the Percipio-specific details of your uploaded file to aid your learners in the discovery of your content. You can only add published custom content to a custom channel.

> **Note:** On-screen fields marked with * are required.

1. **Navigate to the hosted custom content.**
   a. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
   b. Locate the content in the list.
   c. Click the title, or click the More Actions icon ⋮, then click > **Edit**. The Edit Custom Content page displays.
2. On the Edit Custom Content page, the **Title** may be automatically generated from the content. You can edit this field if necessary.
3. The **Description** may be automatically generated from the content. You can edit this field if necessary .
4. Choose a background image.

- Images should be in a 16x9 aspect ratio.
- The recommended size for the image is 1920 x 1080px.
- The file size must be 300k or less.

5. Select the **content language**.
6. Specify content completion criteria:
   - For **single files, web pages**, and **external links** select one of the following completion options:
     - **The learner opens it:** Once the learner launches the link, Percipio marks it as complete and places the status to **Completed** on the learner's Activity page.
     - **The learner marks it as complete:** Once the learner launches the link, they can mark the content as complete using the **Mark as completed** option from the content card while viewing the card from a channel or journey or from Activity page. If the learner views the content from search results, they do not see the Mark as complete option and must choose to mark the item complete from their Activity page.
     - If the Learning time entry setting is selected for your site, learners can also add the amount of time they spend learning for this item. The time they enter is tracked in their learning activity and counts towards their learning goals. Learners can enter their time from the More actions menu on a content card or from the Activity page.
     - In some cases, like YouTube, tracking and completions options are included with the link.
   - For **SCORM** and **AICC** packages, Percipio uses the completion criteria specified in the course package.

- For **YouTube** links, .mp3, and .mp4 files Percipio assumes completion after the user watches at least 50% of the video or listens to at least 50% of the audio file.

7. If you uploaded a SCORM or AICC package, optionally [edit the package's content player behavior](#).
8. Select **Next: Add content discovery details** to continue making edits, or select **Save unpublished changes** to return at a later date.
9. Select your **modality**.

   Choose the learning style that best fits your content to determine how it is categorized within Percipio.

   - **Watch**: usually a video or course
   - **Read**: usually an e-book, article, or blog post
   - **Listen**: usually an audio book
   - **Practice**: usually resources that can be edited for a user's purpose, such as Microsoft Word or Excel documents
10. Select a **Content type**. Content type is a universally recognized classification that defines how the content will be consumed by the learner. Skillsoft uses the types: videos, courses, labs, live events, books, audio books, etc. We suggest you use these as a starting point, but also define some of your own such as web articles, presentations, and quarterly meetings.

    There is a default selection but you can select a different type from the drop-down or enter a new value. We suggest you use the type ahead feature to avoid replicating an existing entry. You do not want to have two or three entries for the same item; one with title-case, one with all lowercase, a one-word entry, a two-word entry, or a hyphenated word would all be considered different types.

A couple of notes about **Content type**:

- When adding an external link, we recommend that you do not specify the Content type as **link** because it does not give the user any idea what kind of content it is. Is it a link to a video, document, or some interactive website?
- When adding a SCORM/AICC course we recommend that you keep the Content type as **course** so learners can receive completion certificates, if enabled on your site. If you change the Content type to something other than **course** for a SCORM/AICC course, learners can't receive a completion certificate.

11. Select a **content source** from the list or enter a new value. We suggest you use the type ahead feature to avoid replicating an existing entry.

    Content Source is who owns the intellectual property; it is not the platform where the item resides, such as YouTube or SharePoint. Skillsoft uses source to distinguish brands and partner content like Wintellect and GoFluent.

    > **Note**: Content source is a required field. If you are editing a previously created content item and did not specify a content source at the time of creation, Percipio populates the field with the Organization Name.

12. Enter a **recommended duration**.

    This displays on the content card. The duration is the average amount of time your learner can expect to engage with the content. To estimate books and content, use the average of 300 words per minute. If adding a video file, use the actual duration of the video.

13. To ensure the best experience, select the **device(s) for which your content is optimized**. When learners attempt to access this content on a

device not selected here (an “unsupported device”), a message directs them to access the content on the selected (“supported”) device(s).

14. Optionally, select or enter a new **expertise level**, **technology title**, **technology version**, and **additional search terms**.
15. Optionally, enter an **external ID**. This is a unique identifier you can use to search for your custom content in Percipio Admin. The external ID does not display to learners in any search results or content cards.
16. Select one of the following actions:
    - **Cancel**: Discard all changes.
    - **Save as Draft**: Save your changes for modification or publication later.
    - **Next: Review content details**: Progress to the final stage to review your settings and publish.
17. Review the details of your custom content. Select to edit any details if necessary, then choose one of the following actions:
    - **Cancel**: Discard all changes.
    - **Save as Draft**: Save your changes for modification or publication later.
    - **Next: Publish Content**: Publish the content to a Percipio server so that you can add it to a channel or journey.
18. Select to **Publish** your content or **Save as draft** for editing at a later date.

    Note: Publishing your content places it on the Percipio server. It is not yet available to your learners; to make it available to them, it must be added to a custom channel or journey.

19. **Add published custom content item to a custom channel or journey.**

To add the item to a journey, see Editing a Journey. To add to a custom channel follow these steps:

a. On the **CONTENT > Custom Channels** page, click the name of the channel to which you want to add the custom content. The Edit Channel page displays.

b. Select **Add content from library**.

c. Enter item's title.

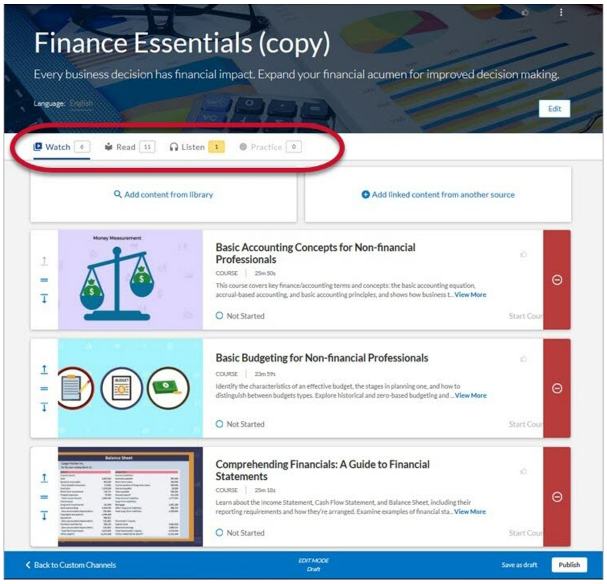
d. Select .

> **Note:** If you recently published your item to Percipio's server, it may take several minutes to display in your search results.

a. Locate the item and click to add it to the channel.

b. Select **Done** to save the channel.

The number of assets in each modality updates in yellow. To see the newly-added item, click the appropriate modality tab.



c. Select **Publish** to publish the channel to Percipio.

Learners can now find your custom content in the library or by searching.

You can only add published custom content to a custom channel.

Replace a Web Page

Skillsoft recommends you replace a file when the changes within it are minimal and provide no new information to the learner. Grammatical or spelling errors and image updates are common reasons to replace an existing file, instead of retiring the current file and uploading a new one in its place.

Important information about replacement file storage

When you replace a hosted file, the existing version is removed from Percipio's server, and a copy is not saved. Your hosted storage space is affected only if the new file is smaller or larger than the original (for example, if the original file is 20 MB and the replacement file is 18 MB, 2 MB of storage becomes free on your site).

To replace a file

1. **Navigate to the hosted custom content.**
   a. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
   b. Locate the content in the list.
   c. Click the title, or click the More Actions icon ⋮, then click > **Edit**. The Edit Custom Content page displays.
2. At the top of the page, click **Replace file.**
3. Browse to the new file.
4. Click **Upload**.
5. Edit the web page details.
6. Click **Publish**.

   The content updates in Percipio and, if it is already added to a published custom channel, is immediately available to learners.

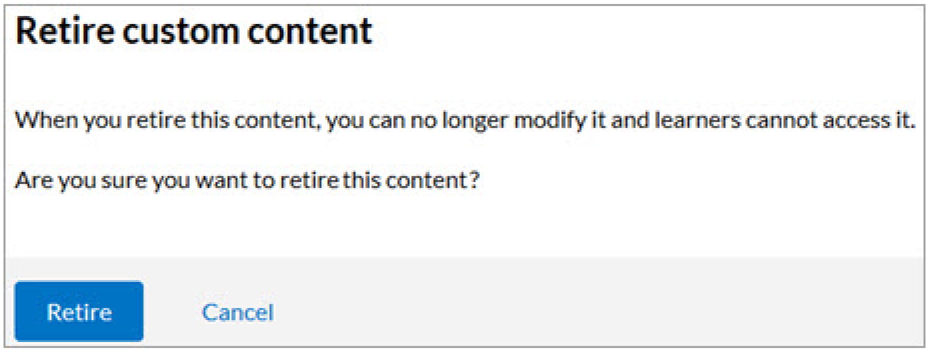
   > **Note:** If the original content was not yet added to a custom channel, the content is not yet discoverable or available to learners. You must add the custom content to a custom channel and then publish that channel.

Retire a Web Page

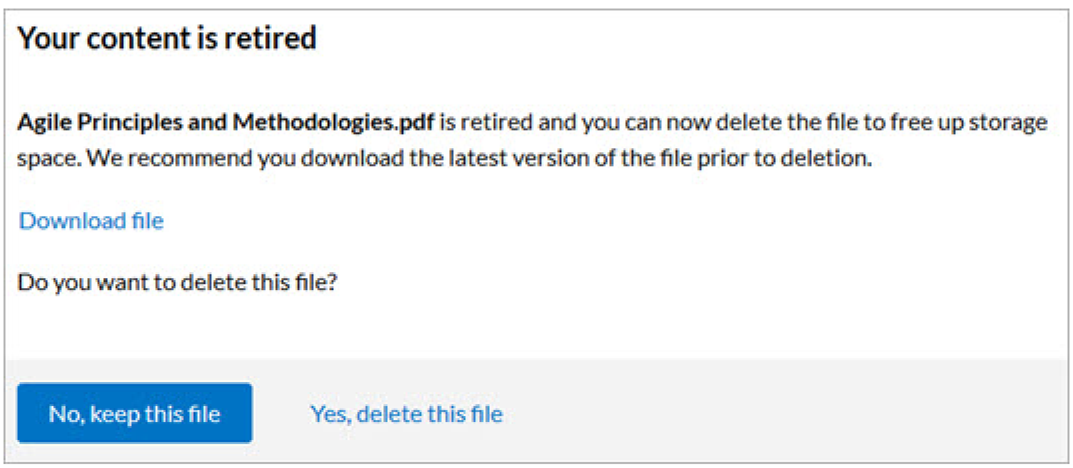
Retiring a file removes it from the library, and makes it unavailable to learners.

> **Note:** Retiring content cannot be undone.

1. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
2. Locate the custom content you wish to retire.
3. Select the More Actions icon ⋮, then **Retire**. A confirmation message displays:



4. In the confirmation message, select **Retire**.The content retires immediately and is no longer accessible to learners.
5. Another message displays asking if you want to free up space.



6. Select **Download file** to save a copy of the retired content.
7. Select one of the options:
    - **No, keep this file:** Keeps the content on the server, and storage space remains unchanged.

- **Yes, delete this file:** Removes the content from the server and frees up storage space.

Single Files

You can upload Microsoft Word documents (.doc, .docx), Microsoft Excel spreadsheets (.xls, .xlsx), Microsoft PowerPoint presentations (.ppt, .pptx), PowerPoint slideshows (.pps, .ppsx), PDF documents (.pdf), and media files (.mp4, .mp3, .mov). You also can copy a link to a course, document, or video that is hosted somewhere else (at your company, on YouTube, in your LMS, or any other source).

See the complete list of supported single file types.

Upload a Single File

For a complete listing of supported file types, see Single-file custom content.

To upload a file

1. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
2. Click **Add Custom Content Item**.
3. Click **Upload single file(s)**. The Upload file page displays.
4. Click **Browse** to locate your file, or drag and drop the file onto the page. The upload begins immediately.
5. Once the upload completes, you can either:
    - edit the single file details, or
    - click **Publish**, then make your content available to learners by adding the custom content to a custom channel.

Edit a Single File's Details

You can edit the Percipio-specific details of your uploaded file. Here, you can add details to aid your learners in the discovery of your content. You can only add published custom content to a custom channel.

> **Note:** On-screen fields marked with * are required.

1. **Navigate to the hosted custom content.**
   a. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
   b. Locate the content in the list.
   c. Click the title, or click the More Actions icon ⋮, then click > **Edit**. The Edit Custom Content page displays.
2. On the Edit Custom Content page, the **Title** may be automatically generated from the content. You can edit this field if necessary.
3. The **Description** may be automatically generated from the content. You can edit this field if necessary .
4. Choose a background image.
   - Images should be in a 16x9 aspect ratio.
   - The recommended size for the image is 1920 x 1080px.
   - The file size must be 300k or less.
5. Select the **content language**.
6. Specify content completion criteria:
   - For **single files, web pages**, and **external links** select one of the following completion options:

        - **The learner opens it:** Once the learner launches the link, Percipio marks it as complete and places the status to **Completed** on the learner's Activity page.
        - **The learner marks it as complete:** Once the learner launches the link, they can mark the content as complete using the **Mark as completed** option from the content card while viewing the card from a channel or journey or from Activity page. If the learner views the content from search results, they do not see the Mark as complete option and must choose to mark the item complete from their Activity page.
        - If the Learning time entry setting is selected for your site, learners can also add the amount of time they spend learning for this item. The time they enter is tracked in their learning activity and counts towards their learning goals. Learners can enter their time from the More actions menu on a content card or from the Activity page.
        - In some cases, like YouTube, tracking and completions options are included with the link.
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7. If you uploaded a SCORM or AICC package, optionally edit the package's content player behavior.
8. Select **Next: Add content discovery details** to continue making edits, or select **Save unpublished changes** to return at a later date.
9. Select your **modality**.

Choose the learning style that best fits your content to determine how it is categorized within Percipio.

- **Watch**: usually a video or course
- **Read**: usually an e-book, article, or blog post
- **Listen**: usually an audio book
- **Practice**: usually resources that can be edited for a user's purpose, such as Microsoft Word or Excel documents

10. Select a **Content type**. Content type is a universally recognized classification that defines how the content will be consumed by the learner. Skillsoft uses the types: videos, courses, labs, live events, books, audio books, etc. We suggest you use these as a starting point, but also define some of your own such as web articles, presentations, and quarterly meetings.

    There is a default selection but you can select a different type from the drop-down or enter a new value. We suggest you use the type ahead feature to avoid replicating an existing entry. You do not want to have two or three entries for the same item; one with title-case, one with all lowercase, a one-word entry, a two-word entry, or a hyphenated word would all be considered different types.

    A couple of notes about **Content type**:

    - When adding an external link, we recommend that you do not specify the Content type as **link** because it does not give the user any idea what kind of content it is. Is it a link to a video, document, or some interactive website?
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tent type to something other than **course** for a SCORM/AICC course, learners can't receive a completion certificate.

11. Select a **content source** from the list or enter a new value. We suggest you use the type ahead feature to avoid replicating an existing entry.

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12. Enter a **recommended duration**.

    This displays on the content card. The duration is the average amount of time your learner can expect to engage with the content. To estimate books and content, use the average of 300 words per minute. If adding a video file, use the actual duration of the video.

13. To ensure the best experience, select the **device(s) for which your content is optimized**. When learners attempt to access this content on a device not selected here (an “unsupported device”), a message directs them to access the content on the selected (“supported”) device(s).
14. Optionally, select or enter a new **expertise level**, **technology title**, **technology version**, and **additional search terms**.
15. Optionally, enter an **external ID**. This is a unique identifier you can use to search for your custom content in Percipio Admin. The external ID does not display to learners in any search results or content cards.

16. Select one of the following actions:
    - **Cancel**: Discard all changes.
    - **Save as Draft**: Save your changes for modification or publication later.
    - **Next: Review content details**: Progress to the final stage to review your settings and publish.
17. Review the details of your custom content. Select to edit any details if necessary, then choose one of the following actions:
    - **Cancel**: Discard all changes.
    - **Save as Draft**: Save your changes for modification or publication later.
    - **Next: Publish Content**: Publish the content to a Percipio server so that you can add it to a channel or journey.
18. Select to **Publish** your content or **Save as draft** for editing at a later date.

    Note: Publishing your content places it on the Percipio server. It is not yet available to your learners; to make it available to them, it must be added to a custom channel or journey.

19. **Add published custom content item to a custom channel or journey.**

    To add the item to a journey, see Editing a Journey. To add to a custom channel follow these steps:

a. On the **CONTENT > Custom Channels** page, click the name of the channel to which you want to add the custom content. The Edit Channel page displays.

b. Select **Add content from library**.

c. Enter item's title.

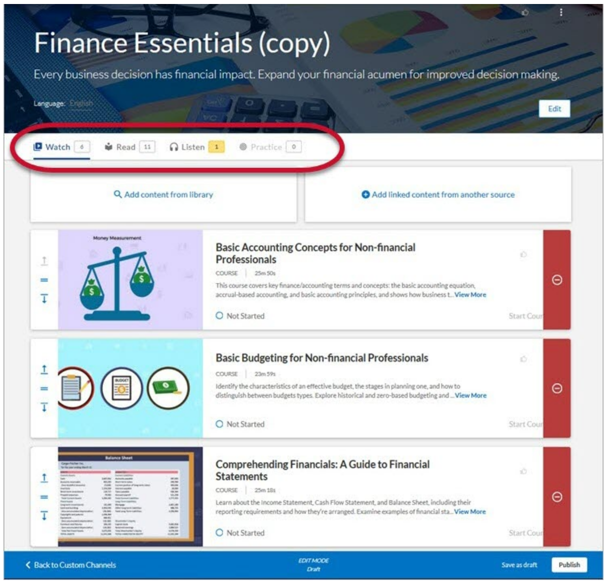
d. Select 🔍.

> **Note:** If you recently published your item to Percipio's server, it may take several minutes to display in your search results.

a. Locate the item and click ⊕ to add it to the channel.

b. Select **Done** to save the channel.

The number of assets in each modality updates in yellow. To see the newly-added item, click the appropriate modality tab.



c. Select **Publish** to publish the channel to Percipio.

   Learners can now find your custom content in the library or by searching.

You can only add published custom content to a custom channel.

Replace a Single File

Skillsoft recommends you replace a single file when the changes within it are minimal and provide no new information to the learner. Grammatical or spelling errors and image updates are common reasons to replace an existing file, instead of retiring the current file and uploading a new one in its place.

Important information about replacement file storage

When you replace a hosted single file, the existing version is removed from Percipio's server, and a copy is not saved. Your hosted storage space is affected only if the new file is smaller or larger than the original (for example, if the original file is 20 MB and the replacement file is 18 MB, 2 MB of storage becomes free on your site).

To replace a file

1. **Navigate to the hosted custom content.**

   a. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.

   b. Locate the content in the list.

   c. Click the title, or click the More Actions icon ⋮, then click > **Edit**. The Edit Custom Content page displays.

2. At the top of the page, click **Replace file**.

3. Browse to the new file.
4. Click **Upload**.
5. Edit the file details.
6. Click **Publish**.

   The content updates in Percipio and, if it is already added to a published custom channel, is immediately available to learners.

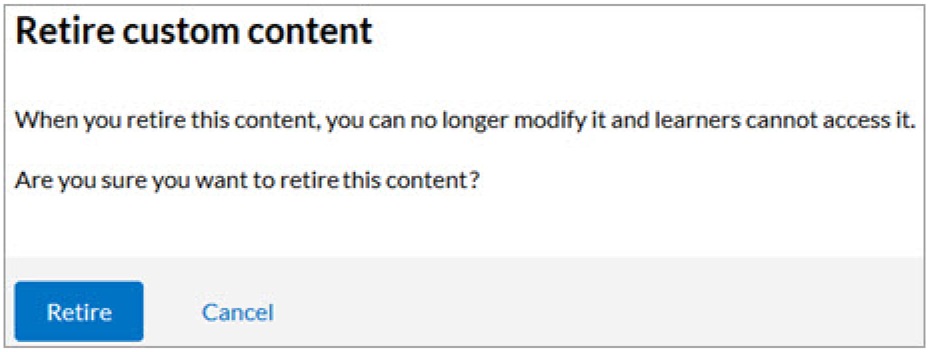
   > **Note:** If the original file was not yet added to a custom channel, the content is not yet discoverable or available to learners. You must add the custom content to a custom channel and then publish that channel.

Retire a Single File

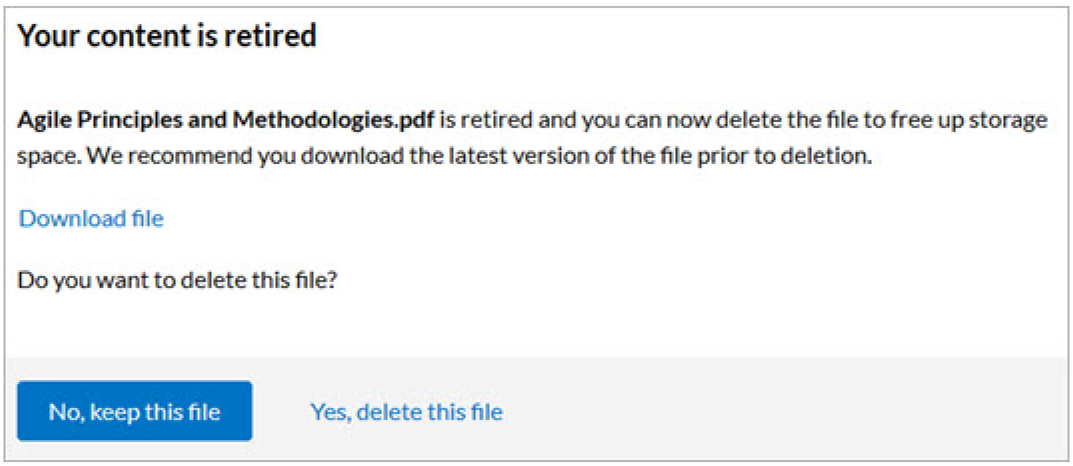
Retiring a file removes it from the library, and makes it unavailable to learners.

> **Note:** Retiring content cannot be undone.

1. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
2. Locate the custom content you wish to retire.
3. Select the More Actions icon ⋮, then **Retire**. A confirmation message displays:



4. In the confirmation message, select **Retire**.The content retires immediately and is no longer accessible to learners.
5. Another message displays asking if you want to free up space.



6. Select **Download file** to save a copy of the retired content.
7. Select one of the options:
   - **No, keep this file:** Keeps the content on the server, and storage space remains unchanged.
   - **Yes, delete this file:** Removes the content from the server and frees up storage space.

External Links

External links are links to content that does not require a license and are hosted outside of Percipio. These links can be to content such as YouTube videos, TED Talks, blogs, white papers, articles, and more. Once added to Percipio, you can assign the link, add it to promoted content banners and strips, and report on it.

External links are made available to learners when you:

1. Add the external link using either the single entry form or the bulk import process.
2. Add the link to a channel and publish it. Learners have to be in an audience that has access to the channel to see the content.

Before creating an external link, review the Custom Content Best Practices documentation.

Actions you can take on external links include:

- Create a single external link
- Add multiple external links at once
- Edit an external link
- Retire an external link

Create an External Link

You can create an external link for your Percipio learners. External links can be any URL you want. They can also be Percipio share links including those to chapters or sections of books and audiobooks.

1. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
2. Select **Add Custom Content Item**.
3. Select **External link(s)**. The Add Custom Content page displays.
4. Enter the **URL** where the content is hosted.

- This field is required.
- The URL must include `https://`
- For some sites (such as YouTube), Percipio automatically populates many of the fields when you enter the URL.
- You can also add a Percipio share link in this field. This is helpful for example, if you want to add a book chapter to a channel, journey, or assignment. When you add a Percipio share link for a book chapter, the following happens:
  - The book title, chapter title, description, and thumbnail auto populate
  - When the learner selects the chapter link, the specific chapter or section opens inline and not in a new tab

5. **Enter the Content details.**

   a. Enter a **title** for the content. This field is required.

   b. Enter a **description**.

   c. Choose a background **image**.
      - Images should be in a 16x9 aspect ratio.
      - The recommended size for the image is 1920 x 1080px.
      - The file size must be 300k or less.

   d. Select a **Content language**. This field is required.

      This determines which language a learner must have set as their Percipio site language in order to see the link from Percipio.

   e. Select your content completion criteria:

- **The learner opens it:** Once the learner launches the link, Percipio marks it as complete and places the status to **Completed** on the learner's Activity page.
- **The learner marks it as complete:** Once the learner launches the link, they can mark the content as complete using the **Mark as completed** option from the content card while viewing the card from a channel or journey or from Activity page. If the learner views the content from search results, they do not see the Mark as complete option and must choose to mark the item complete from their Activity page.
- If the Learning time entry setting is selected for your site, learners can also add the amount of time they spend learning for this item. The time they enter is tracked in their learning activity and counts towards their learning goals. Learners can enter their time from the More actions menu on a content card or from the Activity page.
- In some cases, like YouTube, tracking and completions options are included with the link.

6. **Enter your Content discovery details.**

   These details are visible to learners and determine how your content is classified in Percipio.

   a. Select the **modality** (learning style) that best fits your content.

- **Watch**: usually a video
- **Read**: usually an e-book, article, or blog post
- **Listen**: usually an audio book
- **Practice**: usually resources that can be edited for a user's purpose, such as Microsoft Word or Excel documents

b. Select a **Content type**. Content type is a universally recognized classification that defines how the content will be consumed by the learner. Skillsoft uses the types: videos, courses, labs, live events, books, audio books, etc. We suggest you use these as a starting point, but also define some of your own such as web articles, presentations, and quarterly meetings.

   There is a default selection but you can select a different type from the drop-down or enter a new value. We suggest you use the type ahead feature to avoid replicating an existing entry. You do not want to have two or three entries for the same item; one with title-case, one with all lowercase, a one-word entry, a two-word entry, or a hyphenated word would all be considered different types.

c. Select a **content source** from the list or enter a new value. We suggest you use the type ahead feature to avoid replicating an existing entry.

   Content Source is who owns the intellectual property; it is not the platform where the item resides, such as YouTube or SharePoint. Skillsoft uses source to distinguish brands and partner content like Wintellect and GoFluent.

d. Enter a **recommended duration**, which is the average amount of time your learner can expect to engage with the content.

   To estimate books and content, use the average of 300 words per minute.

e. Select the type of device for which the content is optimized.

   When learners attempt to access this content on a device not selected here (an “unsupported device”), a message directs them to access the content on the selected ("supported”) devices.

7. **Optionally, add additional content discovery details.**

   a. Select an **expertise level** from the drop-down list.

   b. Enter the **technology title** and **version**.

   c. Select **additional search terms** from the list, or enter new terms.

   d. Optionally, enter an **external ID**. This is a unique identifier you can use to search for your custom content in Percipio Admin. The external ID does not display to learners in any search results or content cards.

8. Select one of the following actions:

   - **Cancel**: Discard all changes.
   - **Save as Draft**: Save your changes for modification or publication later.
   - **Next: Review content details**: Progress to the final stage to review your settings and publish.

9. Review the details of your external link. Select to edit any details if necessary, then choose one of the following actions:
   - **Cancel**: Discard all changes.
   - **Save as Draft**: Save your changes for modification or publication later.
   - **Next: Publish Content**: Publish the link to a Percipio server so that you can add it to a channel or journey.
10. Select to **Publish** your external link or **Save as draft** for editing at a later date.
11. **Add published custom content item to a custom channel or journey.**

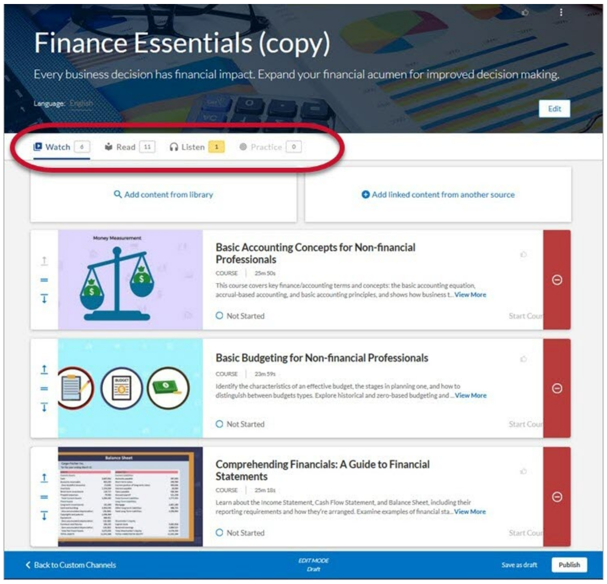
    To add the item to a journey, see Editing a Journey. To add to a custom channel follow these steps:

    a. On the **CONTENT > Custom Channels** page, click the name of the channel to which you want to add the custom content. The Edit Channel page displays.
    b. Select **Add content from library**.
    c. Enter item's title.
    d. Select .

    > **Note:** If you recently published your item to Percipio's server, it may take several minutes to display in your search results.

    a. Locate the item and click to add it to the channel.
    b. Select **Done** to save the channel.

The number of assets in each modality updates in yellow. To see the newly-added item, click the appropriate modality tab.



c. Select **Publish** to publish the channel to Percipio.

   Learners can now find your custom content in the library or by searching.

Edit an External Link

You can edit an external link that is in a **Draft**, **Unpublished Changes**, or **Published** status in Percipio.

To edit an external link from the Custom Content page

1. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
2. Locate the link you wish to modify.

3. Select the title, or select ⋮ > ✎ **Edit**. The Edit Custom Content page displays.
4. On the Edit Custom Content page, modify the fields.

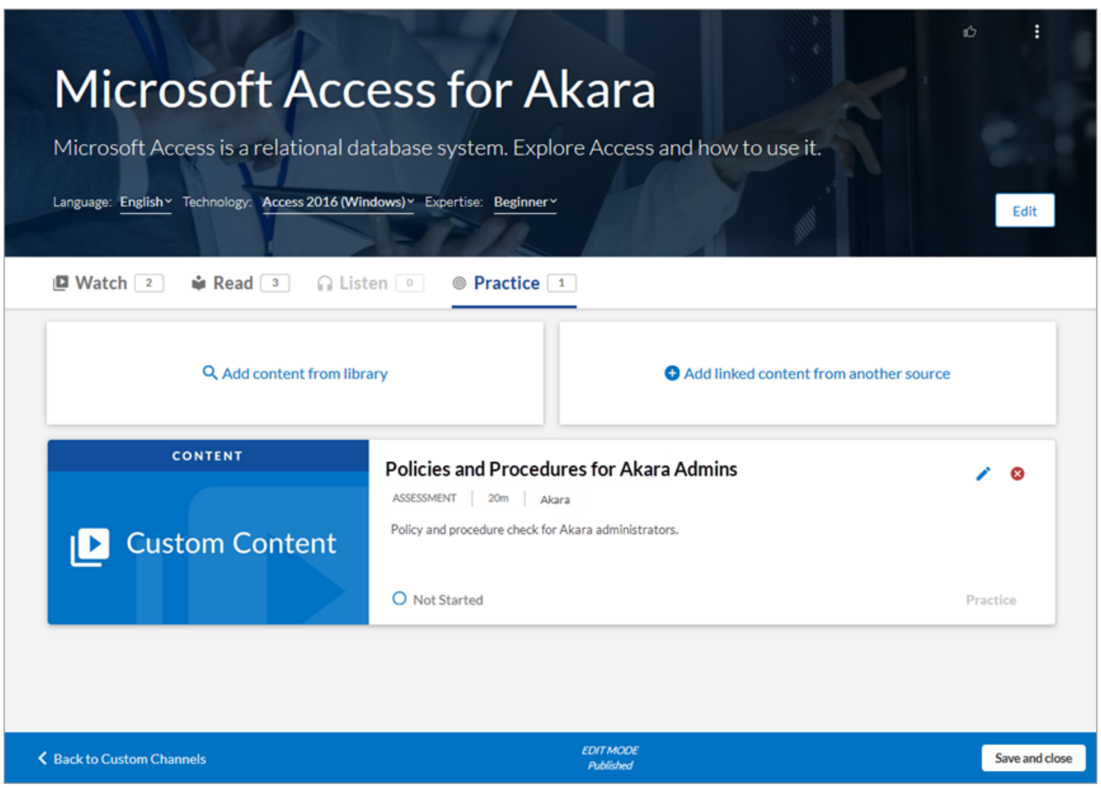
   For detailed information about these fields, see Create an External Link.
5. Select one of the following actions:
   - **Cancel**: Discard all changes.
   - **Save unpublished changes**: Save your changes for modification or publication later.
   - **Next: Add content discovery details**: Make any adjustments to these fields.
6. **Next: Review content details**: Progress to the final stage to review your settings and publish.
7. Review the details. Select to edit any details if necessary, then choose one of the following actions:
   - **Cancel**: Discard all changes.
   - **Save unpublished changes**: Save your changes for modification or publication later.
   - **Next: Publish Content**: Publish the link to a Percipio server so that you can add it to a channel or journey.
8. Select to **Publish** your link or **Save unpublished changes** for editing at a later date.

   > **Note:** If the link was not yet added to a custom channel, the content is not yet discoverable or available to learners, and you must add the custom

content to a custom channel and publish the channel.

To edit an external link from within a custom channel

1. From the Admin menu, select **CONTENT** > **Custom Channels**. The Custom Channels page displays.
2. Locate the channel containing the link you wish to edit.
3. Click the title, or click ⋮ > **Edit**. The Edit Channel page displays.
4. In the content list, locate the external link you wish to edit.



5. Click . The Edit Custom Content page displays.

6. On the Edit Custom Content page, modify the fields.
   For detailed information about these fields, see Create an External Link.
7. Select one of the following actions:
   - **Cancel**: Discard all changes.
   - **Save as Draft**: Save your changes for modification or publication later.
   - **Next: Review content details**: Progress to the final stage to review your settings and publish.
8. Review the details of your external link. Select to edit any details if necessary, then choose one of the following actions:
   - **Cancel**: Discard all changes.
   - **Save as Draft**: Save your changes for modification or publication later.
   - **Next: Publish Content**: Publish the link to a Percipio server so that you can add it to a channel or journey.
9. Select to **Publish** your external link or **Save as draft** for editing at a later date.

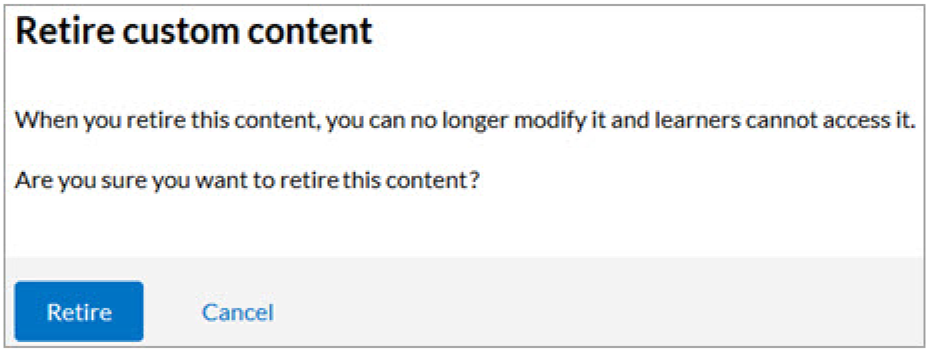
Retire an External Link

Retiring an external link removes it from the library, and makes it unavailable to learners.

> **Note:** Retiring content cannot be undone.

To retire an external link:

1. From the Admin menu, choose **CONTENT > Content Items**. The Manage Content Items page displays.
2. Locate the custom content you wish to retire.
3. Select the More Actions icon, then **Retire**. A confirmation message displays:



4. In the confirmation message, select **Retire**.The content retires immediately and is no longer accessible to learners.

Custom Journey Overview

Upskill or reskill your workforce

If you need to provide your business with an organized way to upskill or reskill your workers, consider creating a custom journey. You might create a custom journey for new hires to onboard more quickly, or another custom journey aimed to cross-train teams, or a third for a new manager training program.

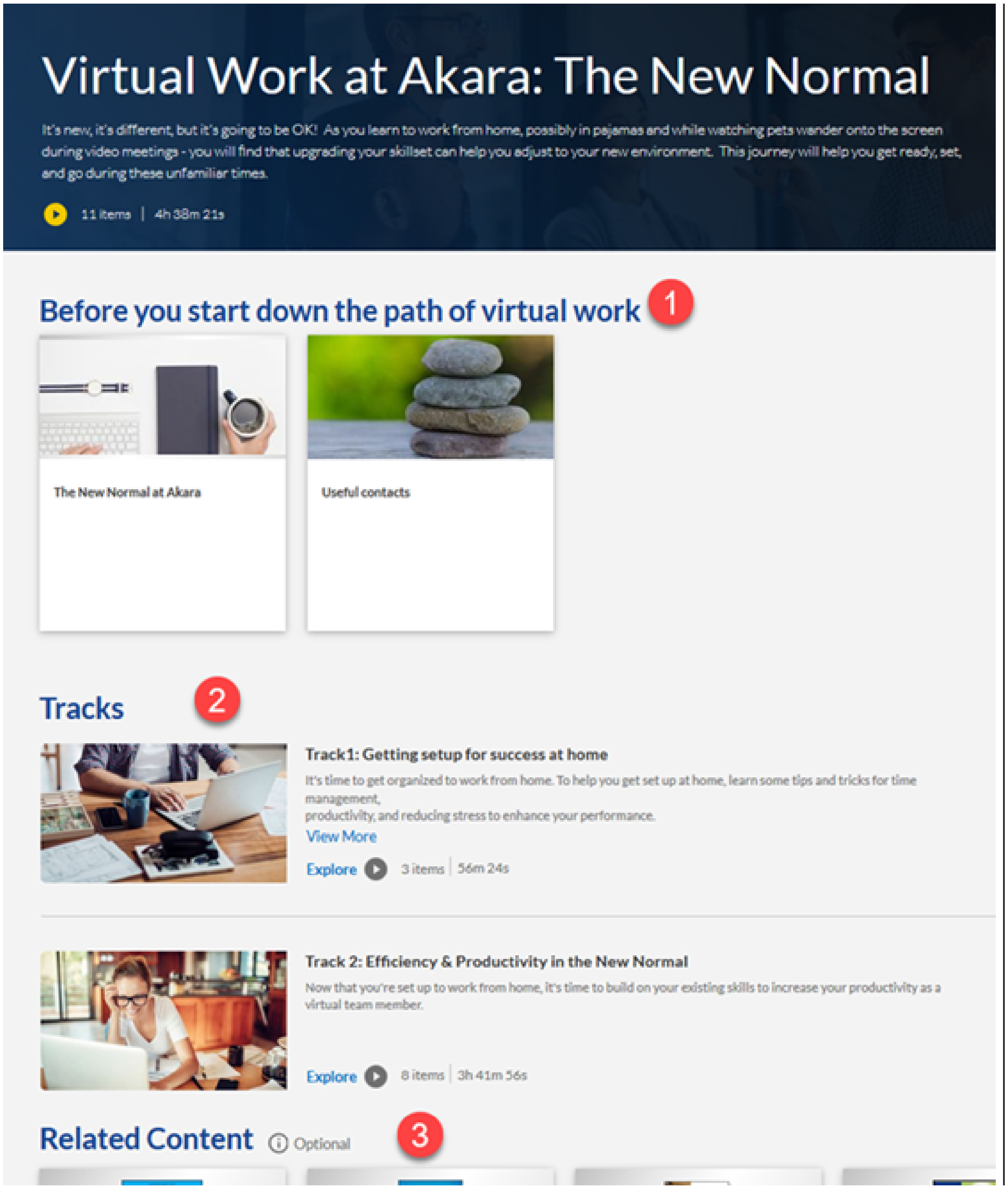
A custom journey is a guided learning path where you can group and order learning content in an organized way, provide both optional and required content, and track progress and completion for your learners. Learning content that you add to a custom journey can be either Skillsoft content or custom content.

Learners can discover a journey by browsing the library or searching, the same as any other content item. When a learner discovers a journey, they can add it to their playlist or share it with a colleague. You can also allow learners to earn a custom Digital Badge for completing custom tracks and journeys.

Before you create a custom journey, read the planning your custom journey to ensure you have the necessary details at hand.

Journey structure

A journey can contain up to three parts depending on the starting point of the learners taking the journey, the skill covered, and the level of support required throughout and after the journey. Before you create a journey, see how it appears to the learner:



1. **Introduction**: In this part, learners see any prerequisite material. Content you might consider including here might be a welcome video, instructions for completing the journey, or a self evaluation so learners can gauge areas of focus. Items in this part of the journey are optional and do not count toward journey completion.
2. **Tracks:** In this part, learners see all the learning content required to complete the journey and acquire the new skill. The learning content is grouped into tracks, which display as strips on the page. A journey must have at least one track, but can have many tracks. Each track can have as many content items as you want. The learner needs to complete all items in a track for it to be marked complete. After a learner completes all tracks, the journey is complete.
3. **Related Content**: Learners see any supplemental material. Content you might consider sharing here include reference books, job aids, company policy or procedure documents, or a final self evaluation so learners can gauge progress. Items in this part of the journey are optional and do not count toward completion of the journey.

Custom journey page

When you view the custom journey page, you see all journeys created and the following information about each:

- **Title:** Shows a hyperlinked title of the journey that when selected brings you to the editing flow.
- **Status:** Indicates the state of the journey. Options include:
  - **Draft:** This means you started creating the journey and saved your changes before publishing. Journeys in this status are not visible to learners.
  - **Unpublished changes:** This means you made and saved changes to a previously published journey, but have not yet published it.

Learners in the targeted audiences can see the published version of the journey, but not the journey with the changes.

- **Published:** This means you made the journey active and learners in the target audience can see and take the journey.
- **Retired:** This means you removed the journey from view and learners can longer see or access it. Retired journeys cannot be edited.

- **Digital Badge:** Indicates whether you associated a custom Digital Badge with the journey or any of its tracks. A value of **Yes** indicates that learners can earn a badge for completing the track or journey. Selecting the hyperlinked Yes shows an image of the badges that can be earned for the journey and its tracks. A value of **No** indicates that learners cannot earn a badge for completing the track or journey.
- **Date modified:** The date someone last modified the journey.
- **Modified by:** The name of the person who last modified the journey. The format shown is the first initial of the first name and the full last name as stored in the Percipio user record.
- **Created by:** The name of the person who created the journey. The format shown is the first name and the last name as stored in the Percipio user record.
- **Actions:** Allows you to perform actions on a journey. You can view details, edit details, or retire a journey.

Frequently asked questions

Why should my organization use custom journeys?

When you use custom journeys, you provide your learners with a defined path through learning content, enabling them to develop their career, assess their skills, and open up opportunities to achieve their fullest potential within your organization. To further understand when to use a custom journey, see Which one to use: Custom Channel, Custom Journey, or Assignment?

Will a custom journey appear in the Aspire Journey section of the library?

No. A custom journey will appear in the area/subject you specify during the creating process.

What Percipio user roles can create a custom journey?

Users with a Percipio role of site admin, content curators and content coordinators can create and edit journeys. Content coordinators cannot assign the journey to an audience and publish, they can only save as draft.

Can I assign custom journeys to my learners?

Yes. After you've created and published your custom journey, you can select it when you're adding content to a new assignment.

Can my learners earn a Digital Badge for completing a track or journey?

Yes. To allow learners to earn a custom Digital Badge for completing the custom track or journey, you must:

1. Turn on custom Digital Badges for your site.
2. Design and publish a custom Digital Badge.
3. Add the custom Digital Badge to each new or existing journey.

Can I target my custom journey to a particular audience?

Yes. When you create a journey you can associate it with a particular audience so only that audience can discover it from search or by browsing.

Add Custom Content to a Custom Channel

Modifications to the content selections affect only the selected language view. For information about language views, see Add a Language View to a Custom Channel.

Adding custom content to a channel makes it available to your learners. You can only add published custom content to a custom channel.

1. From the Admin menu, select **CONTENT** > **Custom Channels**. The Custom Channels page displays.
2. Locate the channel from the list where you want your custom content to display.
3. Select the title, or ⋮ > **Edit**. The Edit Custom Channel page displays.
4. Select **Add content from library.**
5. Enter the title of your custom content and select the search icon .
6. Optionally, use the filters to refine your search results.
7. Select the plus icon, , next to your custom content to add it to the channel.
8. Select **Done**.
9. Select **Publish** to publish the channel updates to Percipio.

   The channel may take a few minutes to update within Percipio. Once updated, the content is available to your learners.

About Regaining Hosting Storage Space

Content replacement

When you replace an existing SCORM or AICC package, Percipio maintains only the most recently-uploaded package files. We recommend you download a copy of the content (via the **Actions > Download File** menu option on the Custom Content page) prior to replacing it.

Content retirement

When you retire a hosted package or a hosted single file, you can opt to delete retired content from the server to free up more storage space. When you delete the content, a record of the retired asset remains via metadata that Percipio uses for historical purposes (such as in reports or on a learner's Activity page).

We recommend you download a copy of the content (via the **Actions > Download File** menu option on the Custom Content page) prior to deleting it.

> **Note:** Retiring content cannot be undone. See Retire a Hosted Package and Retire a Hosted File for procedures.

Custom Content Error Messages

These errors can occur when uploading files and packages, editing the file or package details, creating external links, or editing external links.

Error message	Reason/Solution
An error has occurred. Please check your file and try again.	Ensure your file is in the correct format, then try your upload again.

This field is required.	A required field is not completed. Complete the required field.
Invalid URL format.	The external link URL is incorrect. Re-enter the URL in the correct format.
Title must be unique.	The title already exists in Percipio. Enter a unique title.
Failed virus scan. Please check your file and try again.	Your file may be corrupt or contain a virus. Verify your file is safe for upload, then try to upload it again.
File type must be .png, .jpg, .jpeg, or .gif.	An unsupported image type was placed in the upload area. Select a supported image file type. For supported image

	types, see Single-file custom content.
File type must be .doc, .docx, .ppt, .pptx, .mp3, .mp4, or .mov.	An unsupported file type was placed in the upload area. Select a supported file type, then try your upload again.For supported file types, see Single-file custom content.
File type must be .zip.	An unsupported file package type was placed in the upload area. Select a supported package file, then try your upload again.. For supported package types, see Standards-based custom content.

File size must be less than 2 GB.	The file is too large. Review the file and ensure it is less than 2 GB, then try your upload again.
File size must be less than 2 GB and one of the following formats: .doc, .docx, .ppt, .pptx, .mp3, .mp4, or .mov.	The file is too large and the file type may be unsupported. Review the file to ensure it is less than 2 GB and one of the supported file types (for a complete list, see Single-file custom content), then try your upload again.
File size must be less than 1 GB and be in one of the following formats: .png, .jpg, .jpeg, or .gif.	The package is too large and the package type may be unsupported. Review the package and ensure it is less than 1 GB and

	one of the supported package types (for a complete list, see Standards-based custom content), then try your upload again.
File size must be less than 2 GB and be in one of the following formats: .png, .jpg, .jpeg, or .gif.	The image is too large and the image type may be unsupported. Review the image to ensure it is less than 300k and one of the supported file types (for a complete list, see Single-file custom content), then try your upload again.
A course already exists with the specified id	There is an error with version settings. Fix these settings and try the upload again.

Unable to import course into Rustici Engine because duplicate external package id and version id exists and Integ- ration.Im- plementation.ShouldCreateNewPackageVersion returned false	There is an error with version set- tings. Fix these settings and try the upload again.
Specified zip does not contain a manifest.	There is an error with the mani- fest.Ensure your manifest file is in the zip package, then try your upload again.
Specified zip is invalid as it contains manifest in multiple folders at the same level. ({0} and 1})	There is an error with the mani- fest.Review your zip folder struc- ture, then try your upload again.
No manifest could be found in the list of manifests for the specified zip.	There is an error with the mani- fest.Ensure your manifest file is in the zip package, then try your upload again.
There was an error opening the manifest file. Check that the file exists and that the ASP.NET user has the	There is an error with the mani-

required permissions to read it.	fest. Ensure your manifest file is in the zip package and that its permissions are set appropriately.
The manifest format was not recognized.	There is an error with the manifest. Ensure your manifest is in a standard format, then try your upload again.
Error opening file. Could not load manifest from-[path here] Possible causes of this problem include a bad file location or an invalid XML document (check for unencoded special XML characters such as & > <)	There is an error with the manifest.Check the path and XML document, then try your upload again.
The manifest is malformed, manifest node not found. Are you sure you selected the 'imsmanifest.xml' file?	There is an error with the manifest. Check your file, then try your upload again.
Manifest did not validate against schema.	There is an error

	with the manifest. Validate your manifest, then try your upload again.
ImportCourse failed: webPathToCourse is null	There is an error with the path. Review your files, then try your upload again.
Package web path given exceeds the maximum length of 500 characters. Path: {packageWebPath}	There is an error with the path. Ensure the web path is no more than 500 characters, then try your upload again.
Cannot import this {learning standard} package. Tin Can API functionality is not enabled/licensed by this installation	Learning standard must be one of the following: SCORM 1.1, SCORM 1.2, SCORM 2004 (2nd, 3rd, or 4th editions), or AICC.

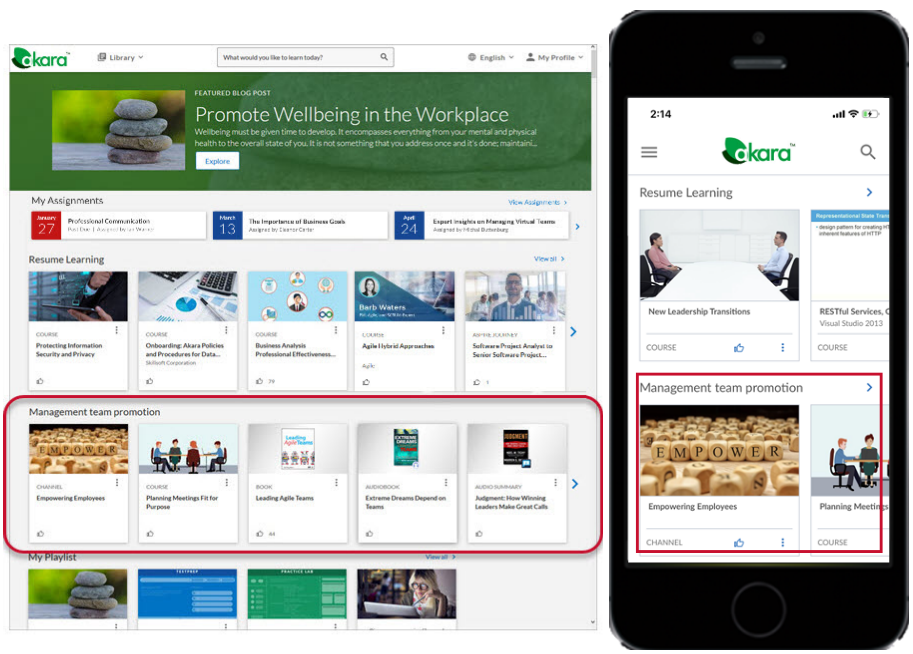
Content Promotions

Content promotions display in banners and/or strips on the Percipio home page, giving a visual display of content items or links you want to highlight to your learners. There is no limit to the number of promotions you can create, but learners only see the first five most-recently created (or edited) banners and first two most-recently created (or edited) strips they are entitled to view, based on their audience membership. Promotions can be targeted to all learners or to specific audiences.

Content strip promotions

A content strip promotion is a collection of up to 15 admin-selected Skillsoft and/or custom content items that display in a single row on the Percipio home page, below the My Assignments and Resume Learning strips.

There is no limit to the number of promotions you can create, but learners only see the first two most-recently created (or edited) strips they are entitled to view, based on their audience membership.



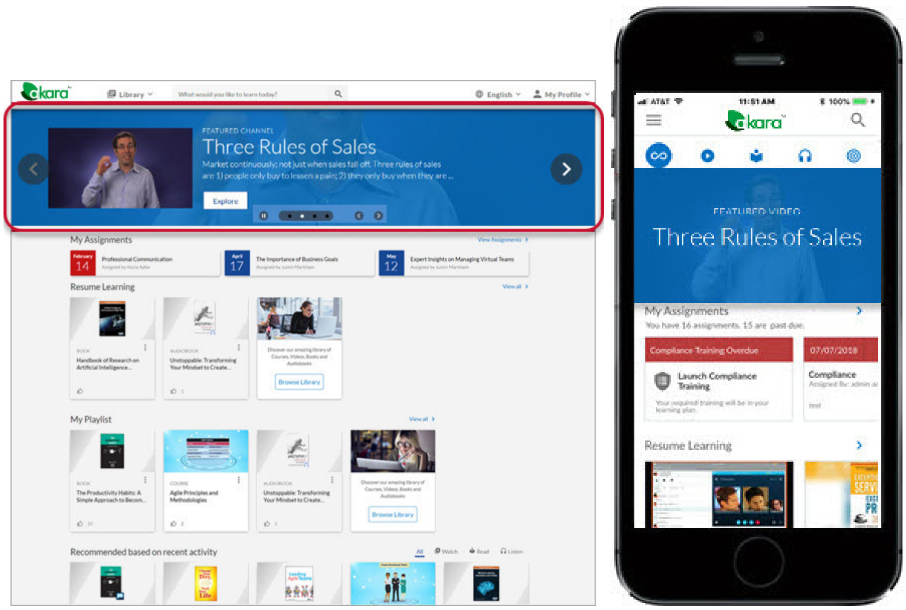
Banner promotions

You can choose one of two types of banner promotions to display across the top of the home page in place of the search banner:

- A content banner promotion highlights a single piece of content that exists within Percipio.
- A image banner promotion provides a way to customize your Percipio home page with an image or promote a link to an external item.

There is no limit to the number of promotions you can create, but learners only see the first five most-recently created (or edited) banners they are entitled to view, based on their audience membership.

Banners display via a carousel, and each one can call attention to a content item or external link most relevant to your learners.



You can:

- target these promotions to specific groups of learners using audiences,
- customize the banner,
- add your own call-to-action, and

- change the promotion at any time to support various objectives your organization may have.

Frequently asked questions

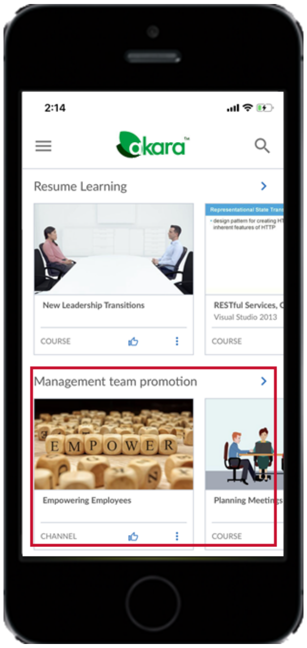
Why should I use content promotions?

Use content promotions to highlight specific content items relevant to your learners, and target these promotions to specific groups of learners using audiences. You can add your own call-to-action and change the promotions at any time to support various objectives your organization may have.

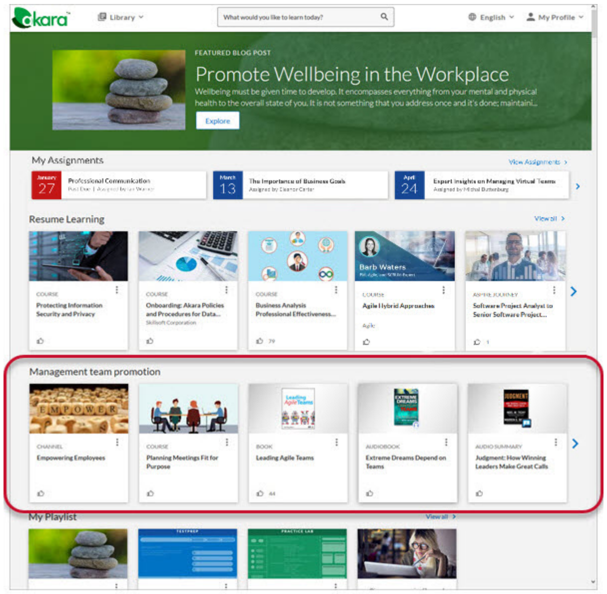
Where does a content strip promotion display?

Learners see up to two content strips on their home page, and they display in the order in which they are modified (most recent first).

- **Percipio mobile app:** Strips display below the My Assignments and Resume Learning strips. If a banner is present, the strip displays below it.



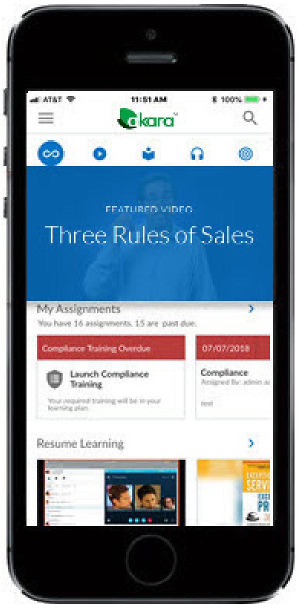
- **Percipio for the Web:** Strips display below the My Assignments and Resume Learning strips.



Where does a banner promotion display?

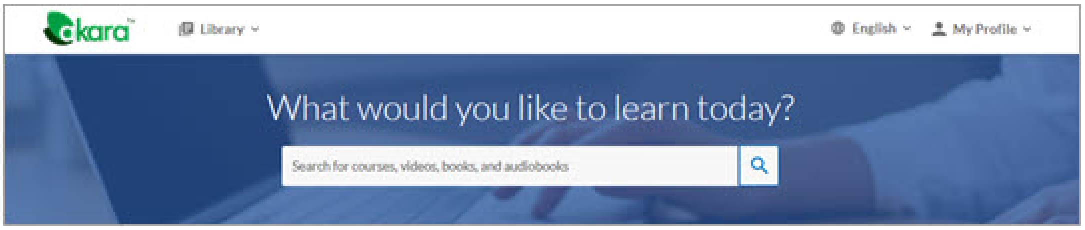
Learners see up to five content banners in a carousel on their home page, and they display in the order in which they are modified (most recent first).

- **Percipio mobile app:** The banner displays on the home page, above the My Assignments strip.

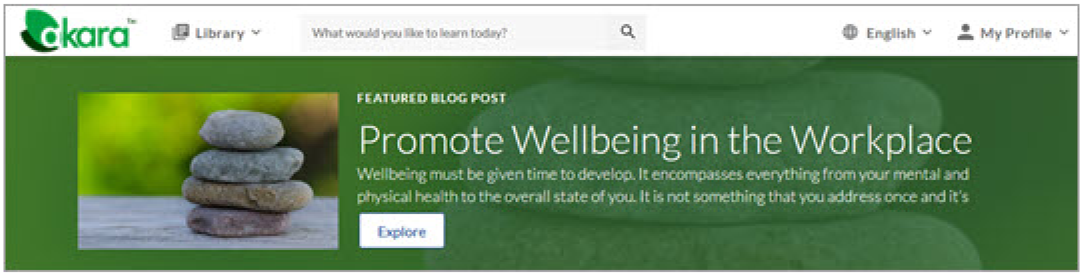


- **Percipio for the Web:** The content banner displays in place of the search banner on the home page, and the search bar moves to the very top of the page. Learners see a carousel of up to five banners on their home page, and they display in the order in which they are modified (most recent first).

  Search banner on the home page (no promoted content banner):



  The promoted content banner replaces the search banner and moves the search bar to the top of the page:



If I change the title, description, or other information for a piece of custom content that I'm promoting, will my content promotion automatically change with it?

No. You must manually enter your changes into the content promotion. See Edit an Existing Content Strip Promotion and Edit an Existing Content Banner Promotion for procedures.

What is the difference between a content banner and a content image promotion?

A content banner allows you to select any Skillsoft or custom content item from the Percipio library to promote in a banner at the top of the Percipio home page, including a channel or journey. The image displayed comes from the image loaded with the content item.

An image banner is not tied to a Percipio content item. You upload any image you want to help brand your Percipio home page or promote something outside of Percipio. You can make the image interactive by specifying a valid URL.

Can I customize the image of a banner promotion?

No. Banner promotions use the image associated with the content item. You cannot change the image that shows in the promotion.

If you are using a custom content item and decide to change its image, the banner is not automatically updated with the new image. For learners to see the new image, you must either remove the item from the promotion and re-add it, or create a new promotion all together.

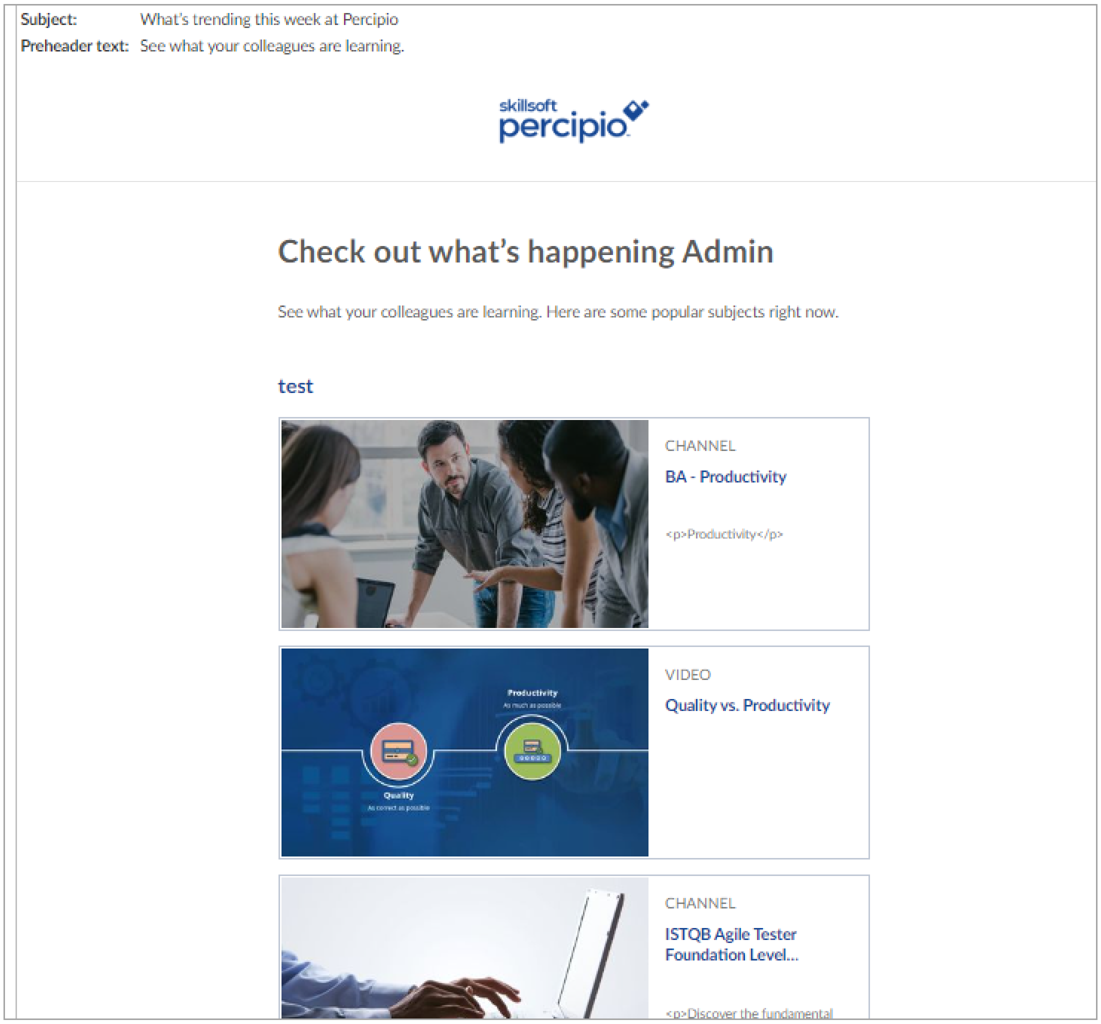
Can I notify my learners of a new promotion?

When you launch a new content strip promotion, you can opt to send a customized email to your learners notifying them that the promotion is live.

Email notifications is coming soon for content banner promotions.

What does the content strip email notification look like?

You can customize the messaging for the email notification for the content strip promotion and preview it on screen. A sample email is shown below.



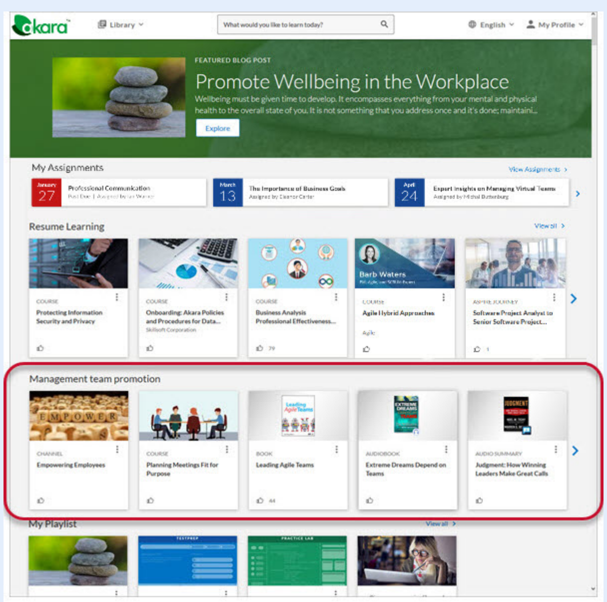
Content Strip Promotions

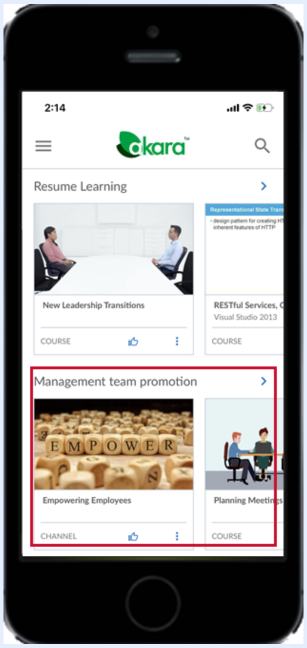
You can use content strips to highlight specific content items relevant to your learners, and target these promotions to specific groups of learners using audiences. There is no limit to the number of promotions you can create, but learners only see the first two most-recently created (or edited) strips they are entitled to view, based on their audience membership. Promotions can be targeted to all learners or to specific audiences.

To encourage learners to view the content within your promotion and engage with the learning, you have the option to send email notifications to learners and audiences you targeted. You can customize the email and send it upon launch of the promotion. You can then edit the email and resend it any time throughout the duration of the promotion. Measure the success of your email campaign by reviewing the Content Promotion Summary report.

Example content strip promotion

Example: You want to create a strip for your management team to call attention to various courses, channels, and books available to them.





Assumptions for this example:

1. Your learners are already set up as users within Percipio.
2. Learners are already in an audience called Management Team.

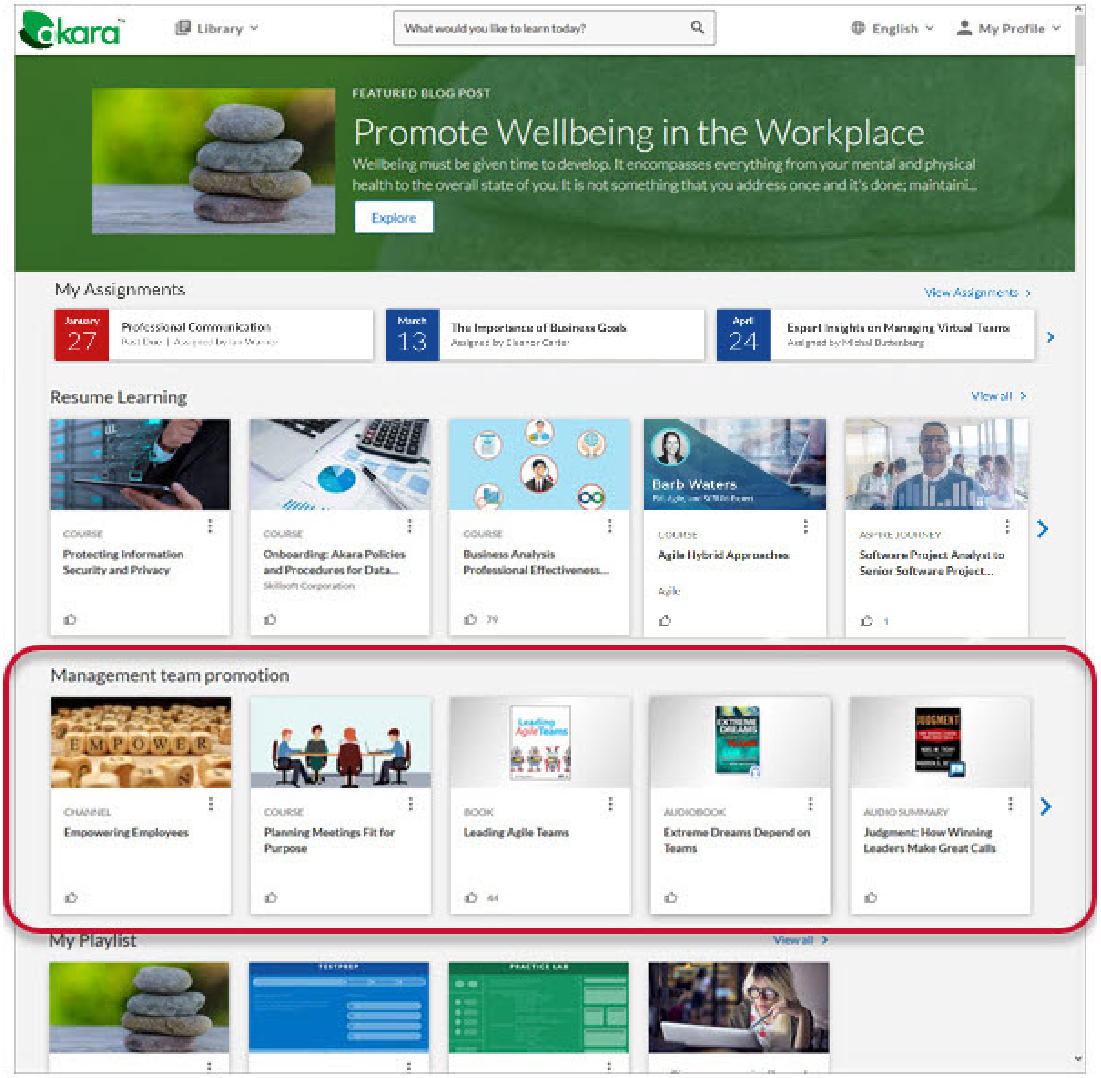
3. The Management Team audience is associated with the license pool that contains the content you want to showcase.

For procedures to set up new users, see Create a New User or Bulk Import New Users. For procedures to set up an audience, see Create a New Audience.

Create the strip promotion. Select the content items, from 3 up to 15 items, and the Management Team audience. Choose the start date and an end date to avoid maintenance in the future. Place the items in the order they should display to learners.

Create a Content Strip Promotion

A learner can view up to two content strips on the home page. You can create as many as you want and target them to different audiences.



To create a new content strip promotion

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. Select **Create New Promotion**.

2. Select **Content strip promoting channels or content items from the library**. The New Promotion - Library Content Strip page displays.
3. Enter the **Content strip title**. This is the title that displays to the learner as the strip header.
4. Select a **Language** from the drop-down list. This only affects the language of content you can add to the strip (for example, if you select German, when you search for content items to add to the content strip, only German content items display in your search).
5. Enter a **Start date**.

   > **Note:** If the Start date is in the future, the promotion displays to your learners beginning at 12:00:00 GMT of the chosen day.

6. Optionally, enter an **End date**. The promotion stops at 11:59:59 GMT of the selected day.

   > **Note:** If you choose not to enter an **End date**, the promotion runs until you change the end date or pause the promotion.

7. Select **Add content**.
   a. Search for the content item(s) you want to promote. Optionally, you can filter the results using the Filters on the left hand side, then select ⊕ to add content. You must add at least three and up to 15 items to the strip.
   b. Select **Add to promotion**. The New Promotion - Library Content Strip page displays again.
8. Optionally, target your promotion to one or more audiences.

a. Select **Add audiences**.

b. Enter the name of an audience you wish to target, or browse the audience list.

c. Select **Done**. The Create Promotion page displays again.

> **Note**: If you do not target specific audiences, the promotion displays to all learners via the **All users** audience. If a learner is not entitled to the promoted content, they get an error message instead of the content item. To avoid this, select one or more audiences associated to the license pool that contains the content you are promoting.

9. Optionally, notify your target audience that the promotion is live by ensuring the **Send promotional email for this content promotion** is selected. If you choose not to send an email, unselect this option and proceed by selecting**Create Promotion**. When you choose to send the email (option selected), you can then customize your email as follows:

   a. Select **Next, Notify users**.

   b. Select a date to send your email. By default, the date defaults to the start date of your promotion. You can choose to have the email go on a different date. At any time throughout the duration of the promotion, you can choose to edit your promotion to update and resend an email.

   c. You can use the default text, but we recommend that you customize your email message by entering a **Subject line**, **Pre-header text**, **Header text**, and **Custom text**. The text you specify in these fields is meant to get the user to open the email and follow the links. To further personalize your email message, you can choose to use two variables within any of the text fields, {First_name} and

{Organization_name}.

Example using variables

In this example, the learner receiving the welcome email is Kezia Adler, and her company is Akara.

In the subject line field, this string:

`{First_name}, access to your Percipio account from {Organization_name} is nearly complete!`

Produces this subject line in the email for Kezia:

`Kezia, access to your Percipio account from Akara is nearly complete!`

d. Select **Refresh Preview** to see how your message will look to users. The email displays the first three items in the content strip.

e. When the email is as you want it, select **Create promotion and send email**.

10. After you select to create a promotion:

- If the promotion's **Start date** is set to today, the promotion launches to the targeted audiences immediately.

  Note: After creating your promotion, refresh your Percipio home page to see your new strip.

- If the **Start date** is in the future, the promotion launches to the targeted audiences at 12:00:00 UTC on the selected date.
- If you selected to send an email notification, Percipio sends the email on the date specified at 12:00 UTC.

Edit a Content Strip Promotion

Learners only see up to two content strip promotions on the home page. You can create as many promotions as you want. You can also send email notifications as often as you like by editing the promotion.

To edit a content strip promotion

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. Select the title of the promotion you wish to edit.
2. Modify the promotion. You can change any of the details, content, and audiences.
3. Optionally, notify your target audience about the promotion by ensuring the **Send promotional email for this content promotion** is selected. If you choose not to send an email, unselect this option and proceed by selecting**Update Promotion**. When you choose to send the email (option selected), you can then customize your email as follows:
   a. Select **Next, Notify users**.
   b. Select a date to send your email. By default, the date defaults to the start date of your promotion. At any time throughout the duration of the promotion, you can choose to update and resend an email.
   c. You can use the default text, but we recommend that you customize your email message by entering a **Subject line**, **Pre-header text**, **Header text**, and **Custom text**. The text you specify in these fields is meant to get the user to open the email and follow the links. To further personalize your email message, you can choose to use two variables within any of the text fields, {First_name} and {Organization_name}.

Example using variables

In this example, the learner receiving the welcome email is Kezia Adler, and her company is Akara.

In the subject line field, this string:

```
{First_name}, access to your Percipio
account from {Organization_name} is
nearly complete!
```

Produces this subject line in the email for Kezia:

```
Kezia, access to your Percipio account
from Akara is nearly complete!
```

d. Select **Refresh Preview** to see how your message will look to users. The email displays the first three items in the content strip.

e. When the email is as you want it, select **Update promotion and send email**. The email sends at 12:00 am UTC on the date specified to all users in the target audience(s) for that promotion.

4. Select **Update promotion**.

Note: If your promotion is active, once you select **Update Promotion**, refresh your Percipio home page to see your changes.

To change the order of your content strip promotions, see Reorder your Content Strip Promotions.

Pause or Resume a Content Strip Promotion

Instead of ending a promotion, you can pause it and resume it at a later date. A paused promotion does not display on the home page and is not visible to your learners.

To pause a content strip promotion

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. From the **Actions** column, click ⋮, then click **Pause promotion**, then click **Yes, pause**. The promotion pauses immediately.

Note: Refresh your Percipio home page to see your changes.

To resume a content strip promotion

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. From the **Actions** column, click ⋮, then click **Resume promotion**, then click **Yes, resume**. The promotion resumes immediately. .

Note: Refresh your Percipio home page to see your changes. Because you updated the promotion, it now displays first. By default, a new promotion or the most-recently edited promotion displays first, followed by the next most recently-edited promotion.

Reorder your Content Strip Promotions

You can have up to two content strip promotions on the home page. By default, a new content strip and/or the most-recently edited strip displays first, followed by the next most-recently edited strip.

To reorder your content strip promotions

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. Locate the strip you want to display first on the home page.
2. Click the promotion title.
3. Make one or more edits on the page.
4. Click **Update promotion**. The promotion displays first to your targeted audiences.

End a Content Strip Promotion

To end a content strip promotion immediately

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. Locate the banner you wish to take down.
2. Click the promotion title.
3. In the **End date** field, enter a date in the past.
4. Click **Update Promotion**. The promotion ends immediately and is removed from the home page.

> **Note:** After you click **Update Promotion**, refresh your Percipio home page to see your changes.

To end a content promotion on a specific date

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. Locate the strip you want to take down.
2. Click the promotion title.

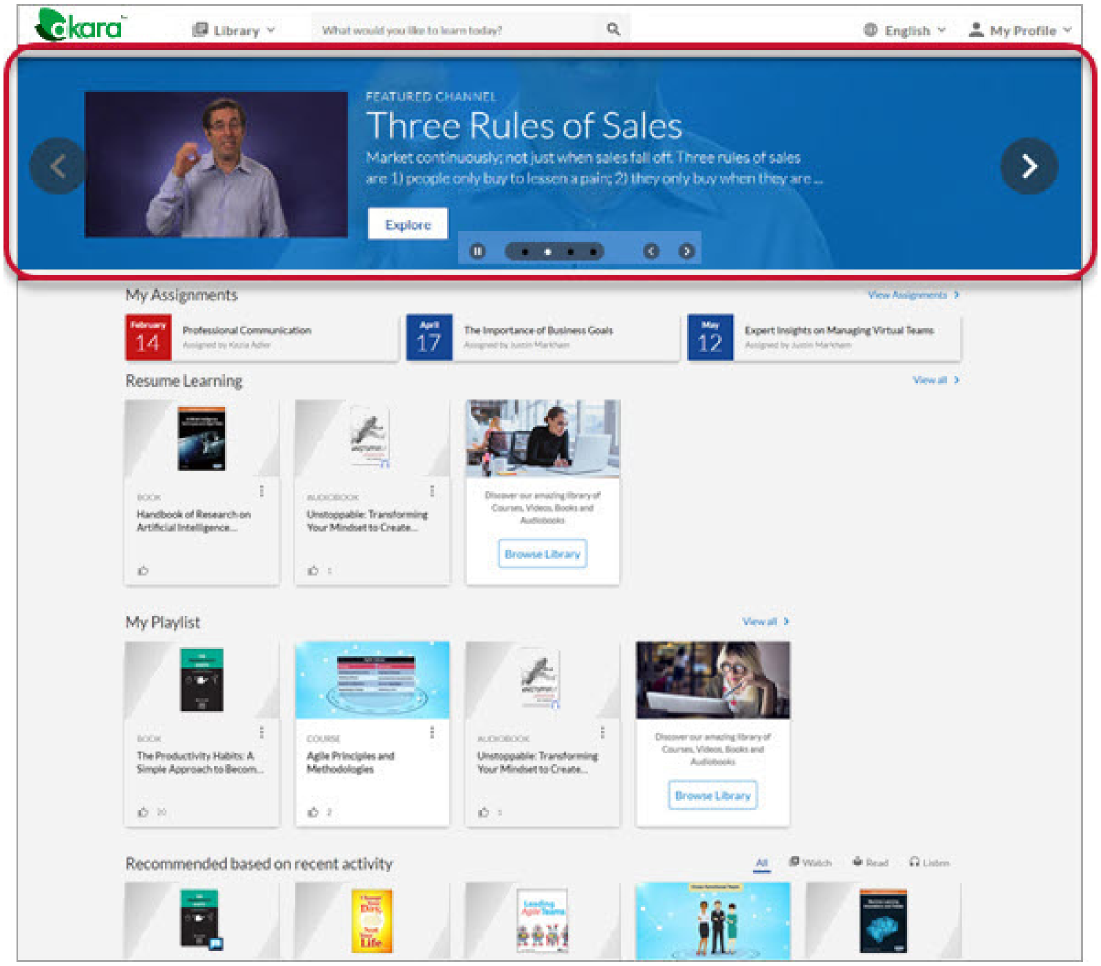
3. In the **End date** field, enter the date you want the promotion to end. The promotion stops at 11:59:59 GMT of the selected day.
4. Click **Update Promotion**.
   - Because you updated the promotion, it now displays first. By default, a new promotion or the most-recently edited promotion displays first, followed by the next most recently-edited promotion.
   - The promotion disappears from your site at 11:59:59 GMT on the selected **End date.**

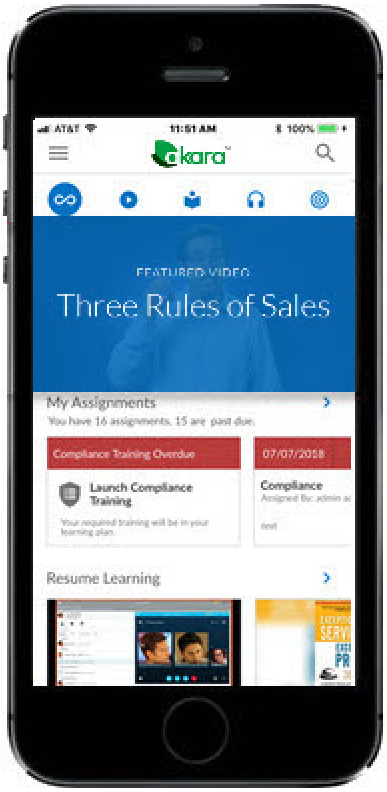
Banner Promotions

You can use banners to highlight specific content items, images, or external links relevant to your learners, and target these promotions to specific groups of learners using audiences. You can also add your own call-to-action and change the promotions at any time to support various objectives your organization may have.

There is no limit to the number of promotions you can create, but learners only see the first five most-recently created (or edited) banners they are entitled to view, based on their audience membership. Promotions can be targeted to all learners or to specific audiences.

You can have up to five banners display via a carousel at the top of your learners' home page. You can set the banners to automatically scroll every 7 seconds. Learners have the option to individually turn automatic play on or off and to manually scroll through banners with the next and previous buttons.


Library
What would you like to learn today?
English
My Profile
FEATURED CHANNEL
Three Rules of Sales
Market continuously; not just when sales fall off. Three rules of sales are 1) people only buy to lessen a pain; 2) they only buy when they are ...
Explore
My Assignments
View Assignments
Professional Communication
The Importance of Business Goals
Expert Insights on Managing Virtual Teams
Resume Learning
View all
Handbook of Research on Artificial Intelligence...
Unstoppable: Transforming Your Mindset to Create...
Browse Library
My Playlist
View all
The Productivity Habits: A Simple Approach to Becom...
Agile Principles and Methodologies
Unstoppable: Transforming Your Mindset to Create...
Browse Library
Recommended based on recent activity

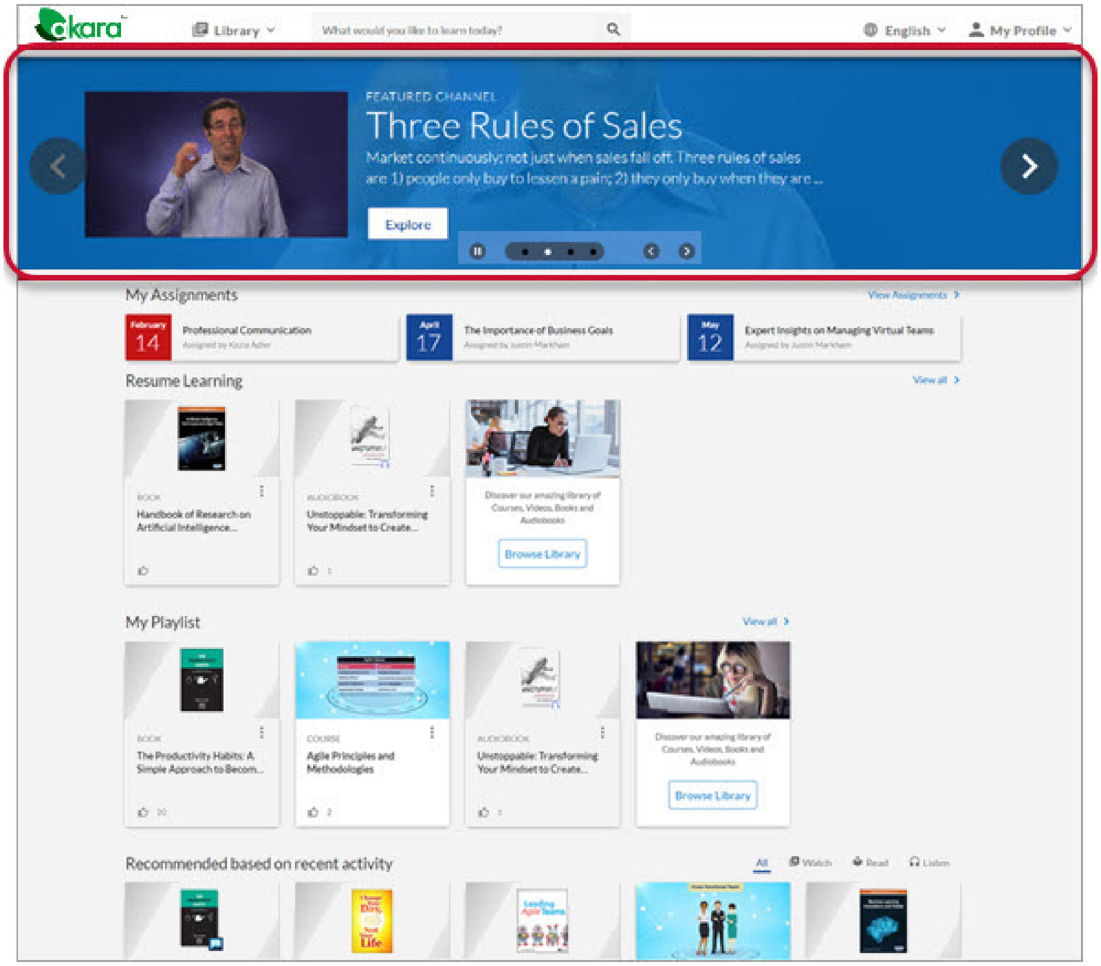

FEATURED VIDEO
Three Rules of Sales
My Assignments
You have 16 assignments. 15 are past due.
Compliance Training Overdue
07/07/2018
Launch Compliance Training
Compliance
Resume Learning

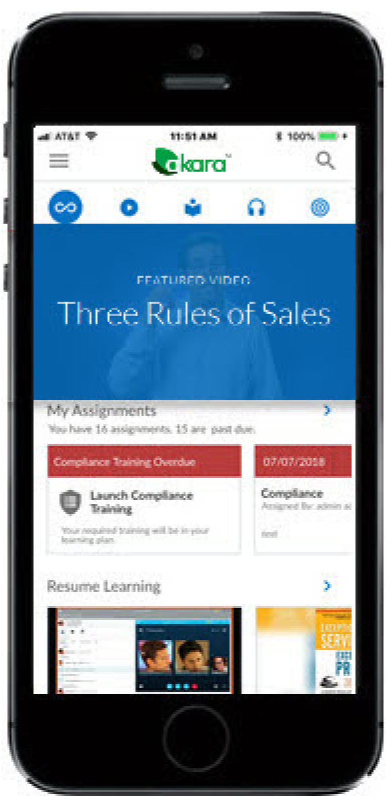
Example content banner promotion

> **Example:** You want to create a banner for your sales team to call out attention to a specific video you want them to watch.
>
> **Assumptions for this example:**
> 1. Your learners are already set up as users within Percipio.
> 2. Learners are already in an audience called Sales Team.
> 3. The Sales Team audience is associated with the license pool containing the content you want to promote.
>
> For procedures to set up new users, see Create a New User or Bulk Import New Users. For procedures to set up an audience, see Create a New Audience.
>
> Create the banner promotion. Select the content item and Sales Team audience. Choose the start date and an end date to avoid maintenance in the future. Customize the title and button if you want. The image that displays in the promotion is the image of the content item you selected; you cannot change it.

Create a Content Banner Promotion

You can have up to five banners display via a carousel at the top of your learners' home page. You can set the banners to automatically scroll every 7 seconds. Learners have the option to individually turn automatic play on or off and to manually scroll through banners with the next and previous buttons.


Library
What would you like to learn today?
English
My Profile
FEATURED CHANNEL
Three Rules of Sales
Market continuously; not just when sales fall off. Three rules of sales are 1) people only buy to lessen a pain; 2) they only buy when they are ...
Explore
My Assignments
View Assignments
February 14
Professional Communication
April 17
The Importance of Business Goals
May 12
Expert Insights on Managing Virtual Teams
Resume Learning
View all
BOOK
Handbook of Research on Artificial Intelligence...
AUDIOBOOK
Unstoppable: Transforming Your Mindset to Create...
Discover our amazing library of Courses, Videos, Books and Audiobooks
Browse Library
My Playlist
View all
BOOK
The Productivity Habits: A Simple Approach to Becom...
COURSE
Agile Principles and Methodologies
AUDIOBOOK
Unstoppable: Transforming Your Mindset to Create...
Discover our amazing library of Courses, Videos, Books and Audiobooks
Browse Library
Recommended based on recent activity
All
Watch
Read
Listen


AT&T
11:51 AM
100%
FEATURED VIDEO
Three Rules of Sales
My Assignments
You have 16 assignments, 15 are past due.
Compliance Training Overdue
07/07/2018
Launch Compliance Training
Your required training will be in your learning plan
Compliance
Resume Learning

To create a new content banner promotion

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. Select **Create New Promotion**.
2. Select **Banner promoting a channel or content item from the library**. The New Promotion - Library Content Banner page displays.
3. Enter the **Banner promotion title**. This is only the title of the promotion itself, not what displays to learners on the banner.
4. Select a **Language** from the drop-down list. This only affects the language of content you can add to the banner (for example, if you select German, when you search for a content item to promote in the banner, only German content items display in your search).
5. Enter a **Start date**.

   > **Note:** The promotion displays to your learner beginning at 12:00:00 GMT of the selected day.

6. Optionally, enter an **End date**. The promotion stops at 11:59:59 GMT of the selected day.

   > **Note:** If you choose not to enter an **End date**, the promotion runs until you change the end date or pause the promotion.

7. Select **Add content**.
8. Search for the content item you want to promote. Optionally, you can filter the results using the Filters on the left hand side, then click . You may only display one content item per banner.
9. Select **Done**.

10. Optionally, select **Customize banner** to change colors and text appearing in your banner. The image that displays in the banner is loaded from the image of the content item you selected; you cannot change the image.

 > **Note:** If you are using a custom content item and decide to change its image, the banner is not automatically updated with the new image. For learners to see the new image, you must either remove the item from the promotion and re-add it, or create a new promotion all together.

Customize the banner text

a. If you want something other than the content item title to display, in the Banner text section, enter a new **title**. We recommend no more than 30 characters.

b. If you want something other than the content item description to display, enter a new **description**. We recommend no more than 140 characters.

c. Optionally, modify the **button** text. We recommend no more than 25 characters.

d. If you are finished with the banner customizations, click **Done**. The New Promotion - Library Content Banner page displays with preview of the banner for both the Web and Mobile App.

Customize the banner color

a. Select a **Background color** or enter a hex color value. This is the banner's overlay color.

b. Select a **"Featured" text color** or enter a hex color value. "Featured" text identifies the content type (for example, FEATURED VIDEO), and generates automatically above the title on your banner.

c. Select a **Title description text color** or enter a hex color value for your banner text.

d. If you are finished with the banner customizations, click **Done**. The New Promotion - Library Content Banner page displays with preview of the banner for both the Web and Mobile App.

Customize the button colors

a. Select a **Button background color** or enter a hex color value.

b. Select a **Button text and border color** or enter a hex color value.

c. Select a **Button hover color** or enter a hex color value to display when a learner hovers his cursor over the button.

d. If you are finished with the banner customizations, click **Done**. The New Promotion - Library Content Banner page displays with preview of the banner for both the Web and Mobile App.

11. Optionally, target your promotion to one or more audiences.

    a. Click **Add audiences**.

    b. Enter the name of an audience you wish to target, or browse the audience list.

c. Click **Done**. The Create Promotion page displays again.

> **Note**: If you do not target specific audiences, the promotion displays to all learners via the **All users** audience. If a learner is not entitled to the promoted content, they get an error message instead of the content item. To avoid this, select one or more audiences associated to the license pool that contains the content you are promoting.

12. Click **Create Promotion**.
    - If the promotion's **Start date** is set to today, the promotion launches to the targeted audiences immediately.

      > **Note:** After creating your promotion, refresh your Percipio home page to see your new banner.

    - If the **Start date** is in the future, the promotion launches to the targeted audiences at 12:00:00 GMT on the selected date.

Edit a Banner Promotion

You can have up to five banners display via a carousel at the top of your learners' home page.

To edit a content banner promotion

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. Select the **CONTENT BANNER** tab. The Content Banner list displays.
2. Select the title of the promotion you wish to edit.

3. Modify the promotion. You can change any of the details, content, customizations, and audiences.

   If you are using a custom content item and decide to change its image, the banner is not automatically updated with the new image. For learners to see the new image, you must either remove the item from the promotion and re-add it, or create a new promotion all together.

4. Select **Update promotion**.

> **Note:** If your modified promotion is live, after you select **Update Promotion**, refresh your Percipio home page to see your changes.

To change the order of your banner promotion carousel display, see Reorder your Banner Promotions.

Pause or Resume a Banner Promotion

Instead of ending a promotion, you can pause it and resume it at a later date. A paused promotion does not display on the home page and is not visible to your learners.

To pause a content banner promotion

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. Click the **CONTENT BANNER** tab. The Content Banner list displays.
2. From the **Actions** column, click ⋮, then click **Pause promotion**, then click **Yes, pause**. The promotion pauses immediately.

> **Note:** Refresh your Percipio home page to see your changes.

To resume a banner promotion

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. Click the **CONTENT BANNER** tab. The Content Banner list displays.
2. From the **Actions** column, click ⋮, then click **Resume promotion**, then click **Yes, resume**. The promotion resumes immediately.

Note: Refresh your Percipio home page to see your changes. Because you updated the promotion, it now displays first. By default, a new promotion or the most-recently edited promotion displays first, followed by the next most recently-edited promotion.

Reorder your Banner Promotions

You can have up to five banners display via a carousel at the top of your learners' home page. By default, a new banner or the most-recently edited or resumed banner displays first, followed by the next most-recently edited banner.

To reorder your content banner promotions

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. Click the **CONTENT BANNER** tab. The Content Banner list displays.
2. Locate the banner you want to display first in the carousel. You can either make an edit or pause and resume it to move it to the top of the list.
3. From the **Actions** column, click ⋮, then click **Pause promotion** or **Edit**.
4. Either **Resume promotion** or save your changes. The promotion displays first in the list to your targeted audiences.

End a Banner Promotion

To end a banner promotion immediately

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. Click the **CONTENT BANNERS** tab and locate the banner you wish to take down.
2. Click the promotion title.
3. In the **End date** field, enter a date in the past.
4. Click **Update Promotion**. The promotion ends immediately and is removed from the home page.

> **Note:** After you click **Update Promotion**, refresh your Percipio home page to see your changes.

To end a banner promotion on a specific date

From the Admin menu, select **LEARNING > Content Promotions**. The Content Promotions page displays with the **CONTENT STRIPS** tab open by default.

1. Click the **CONTENT BANNERS** tab and locate the banner you wish to take down.
2. Click the promotion title.
3. In the **End date** field, enter the date you want the promotion to end. The promotion stops at 11:59:59 GMT of the selected day.
4. Click **Update Promotion**.
    - Because you updated the promotion, it now displays first. By default, a new promotion or the most-recently edited promotion

displays first, followed by the next most recently-edited promotion.

- The promotion disappears from your site at 11:59:59 GMT on the selected **End date.**

Percipio Compliance

If your organization has access to Percipio Compliance and you have Compliance administrator privileges, you can use Percipio in combination with Compliance Administrator to manage all aspects of your learners' Compliance training.

In Percipio, you can:

- Bulk import many new users in Percipio
- Create a new user
- Create a new audience
- Access Compliance Administrator

In Compliance Administrator, you can:

- Assign Compliance content to audiences and individual users
- Configure email notifications and set security levels for Compliance users
- Use the Compliance reporting feature to monitor users' Compliance training

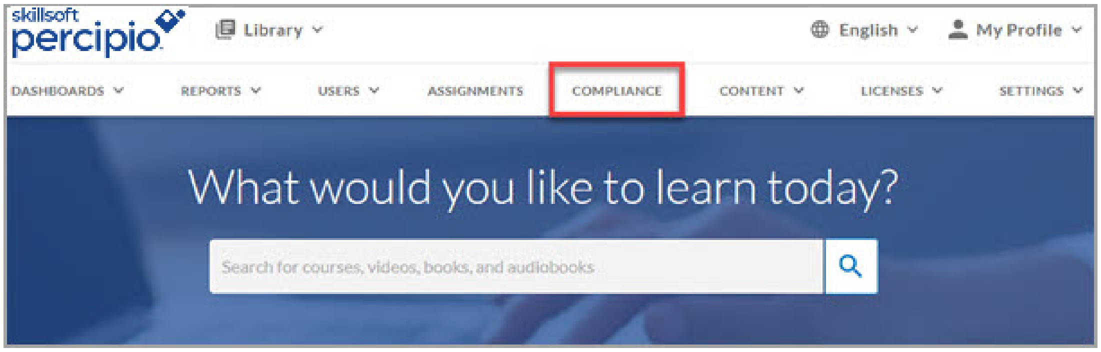
See the Compliance Knowledge Base for more information.

Access Percipio Compliance Administrator

Depending on your privileges, you can access Percipio Compliance Administrator in different ways.

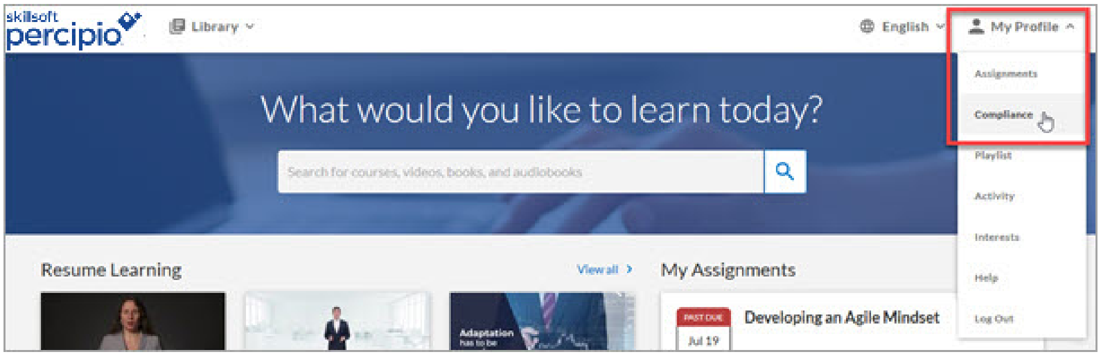
If you have administrator privileges in both Percipio and Percipio Compliance

- Click the **COMPLIANCE** link on the Admin menu to open Percipio Administrator.



If you have administrator privileges in Percipio Compliance only

1. From the **My Profile** menu, click **Compliance.**



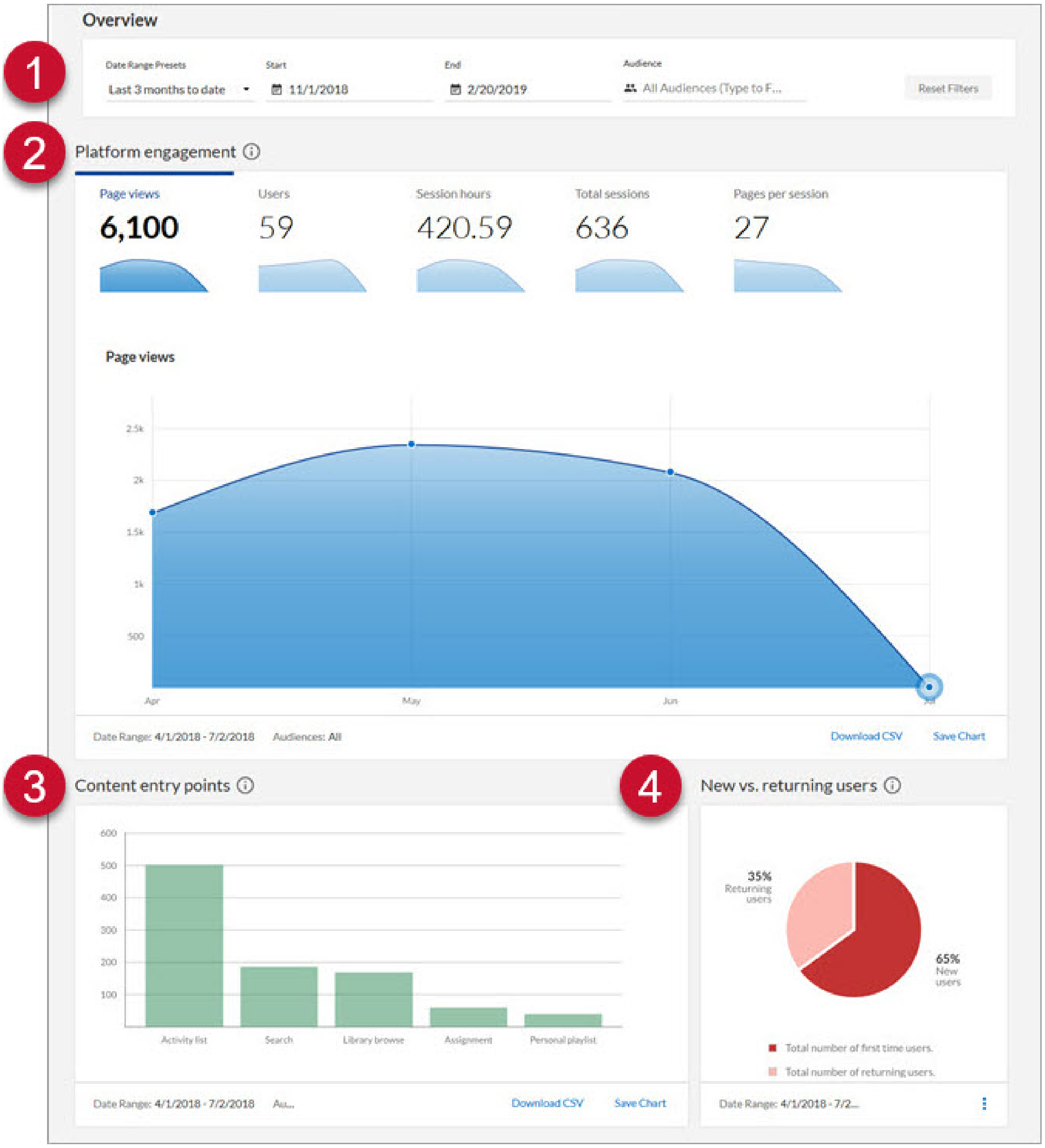
   The Percipio Compliance page displays.

2. On the Percipio Compliance page, click **Administrative Tasks** from your profile drop down. Compliance Administrator opens in a new window.

> **Note**: The Compliance Administrator Knowledge Base is available from the Help links in Compliance Administrator.

Overview Dashboard

The Overview dashboard displays several metrics about how your learners are interacting with the Percipio platform.



1. **Filters**

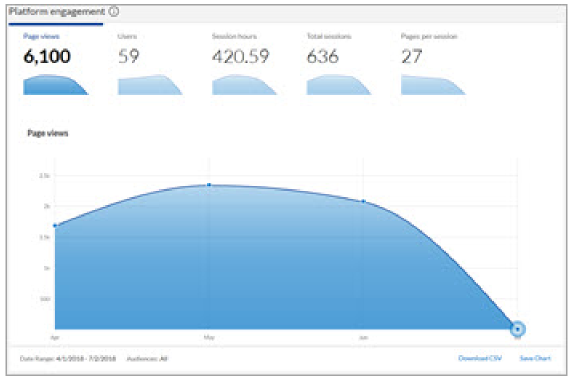
You can filter data on this dashboard by date and audience.

- **Date filters:** Use these to specify the data on your Activity dashboard.
  - **Date Range Presets:** Filters the data by a specified range of dates from the drop-down list.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
  - **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

  > **Example:**
  > If you set the date to **Start** on September 1 and **End** on October 1, only the platform data within the September 1 - October 1 time period is shown.

- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.

2. **Platform engagement chart**



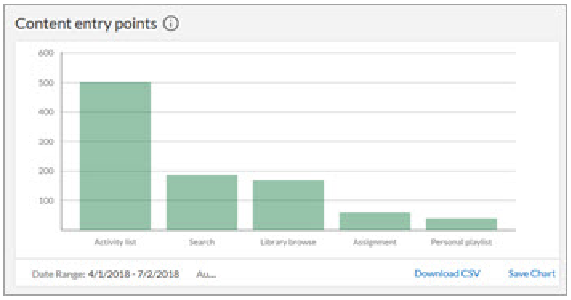
Platform engagement shows several charts related to overall usage in Percipio. When you select one of the individual metric charts, the larger graphic updates to reflect the selected data.

- **Page views:** Total number of platform page views for all users during the selected time frame. A page view is counted each time a user accesses a page within Percipio (whether it be through navigating through Percipio or using search).
  - Examples of a page include a search results page, the Activity page, and the home page.
- **Users:** Total number of unique users accessing the platform during the selected time frame. Each user is counted only once, regardless of how many times they accessed the site.
  - For example, if a learner signs in to Percipio four times within the specified date range, only one visit for this learner is included in this calculation.
- **Session hours:** Total time users spent engaged with the platform during the selected time frame.

- **Total sessions:** Total number of sessions during the selected time frame. This is not user-specific.
  - For example, if a learner signs into Percipio four times within the specified date range, all four sessions are included in this calculation.
  - You can configure how long a learner can stay logged into a session from the Settings, Site Configuration option.
- **Pages per session:** Average number of platform page views per user during a single session during the selected time frame.
  - For example, if a learner signs in to Percipio three times during the specified time frame, and visited six pages during the first session, four pages during the second session, and eight pages during the third session, the average number of platform page views would be six (6 page views + 4 page views + 8 pages views = 18 page views. When those 18 page views are divided by the total number of sessions for the user – in this case, 3 – the average number is six.

To save or download this chart, see Working with the Overview dashboard charts.

3. **Content entry points chart**

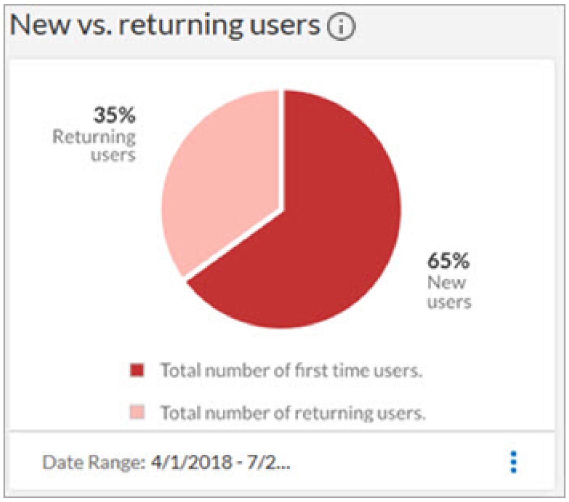


This chart displays the frequency in which learners viewed each of these content access points within Percipio.

- **Activity list:** Total number of time users accessed their Activity page.
- **Assignment:** Total number of times users accessed the assignment.
- **Library browse:** Total number of times users accessed browsing the library.
- **Personal playlist:** Total number of times users accessed the Personal playlist.
- **Search:** Total number of times users accessed search.

To save or download this chart, see Working with the Overview dashboard charts.

4. **New vs. returning users chart**



This chart displays the percentage of new versus returning users. A new user is one who logged in for the first time within the specified date range. A returning user is one who logged in prior to the specified date range AND viewed at least one page within the specified date range.

To save or download this chart, see Working with the Overview dashboard charts.

Working with the Overview dashboard charts

Save a chart

All charts on the Overview dashboard have a **Save chart** option, which saves the chart as a .PNG file for use in other documents (such as a slide presentation).

For most browsers

1. Click **Save Chart**.
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Download a chart's CSV file

You can download a CSV file with the selected chart metrics and use it to import the data into other business systems or documents.

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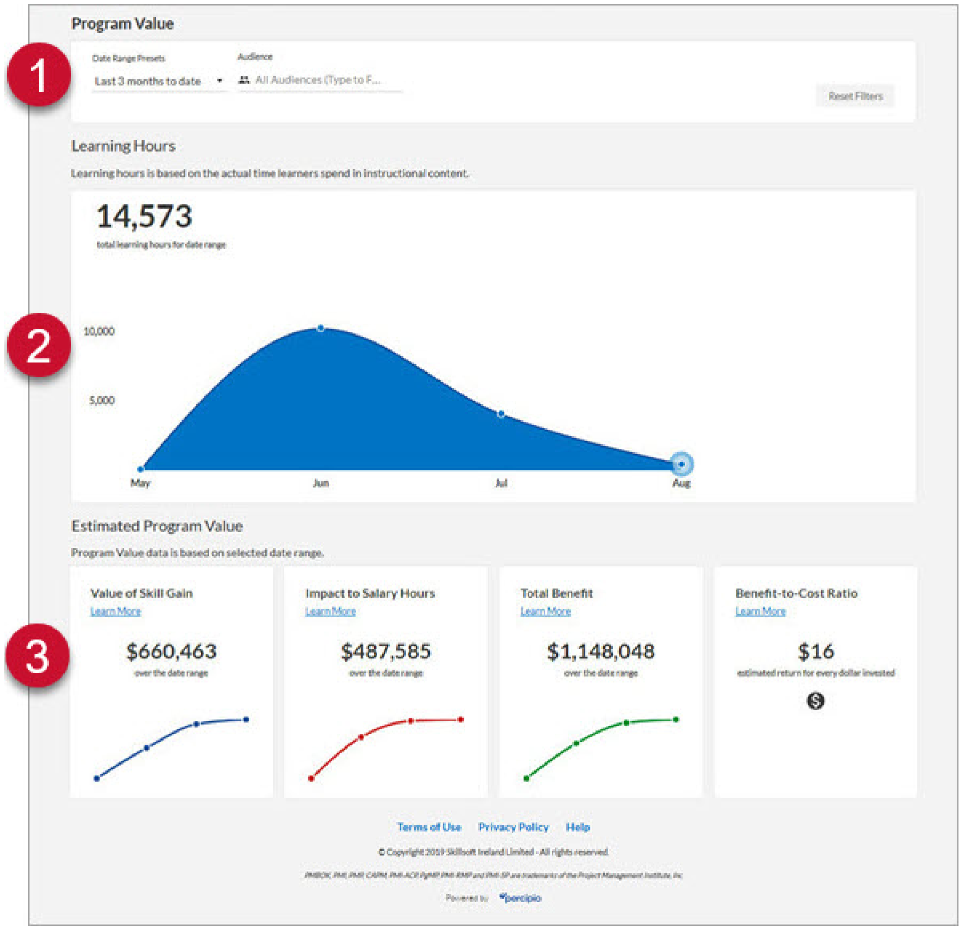
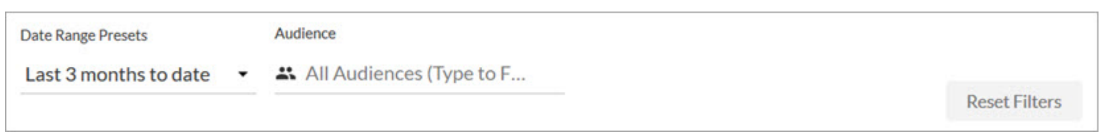
Program Value Dashboard

The Program Value dashboard provides insight into your eLearning program. The highly visual metrics, along with the detailed reports, deliver important information that you can use to understand and manage your organization's learning hours and estimated program value.



1.

Filters



You can filter data on this dashboard by date range and audience.

- **Date Range Presets:** Filters the data by a specified range of dates from the drop-down list.
- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display

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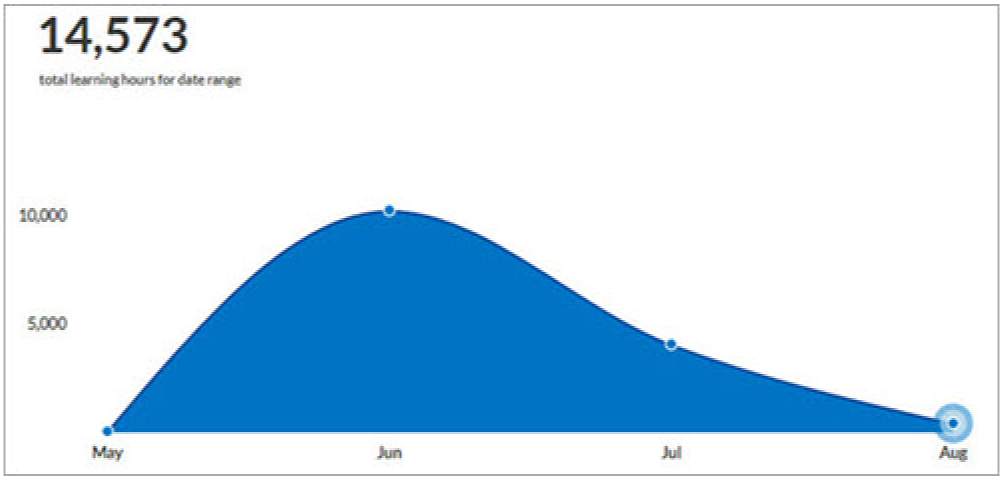
2.

Learning Hours chart



Learning hours are based on the actual time learners spend in instructional content. The Learning Hours chart is a view into the total learning hours for your organization. This important metric includes time the learner spent within any of the instructional content (including courses, books, book summaries, audiobooks, audio summaries, labs, TestPreps, tests, live courses (scheduled content), and videos).

3.

Estimated Program Value chart

The Estimated Program Value charts help you gain insight into the ongoing value to your organization accrued through the use of Skillsoft content solutions. The program estimates calculated in Percipio provide financial metrics on how learning impacts your organization in terms of the value of improved skills and of productive time saved. These estimates are standardized and are based in part on financial information provided by your organization and your contract value (not including the Compliance component of your contract).

See Estimated Program Value Charts for detailed information about each of these charts, and about how estimates and adjustments are calculated.

> **Note**: Compliance contract values are not included in the contract values being passed to Percipio for these dashboard calculations.

Estimated Program Value Charts

The Estimated Program Value charts help you gain insight into the ongoing value to your organization accrued through the use of Skillsoft content solutions. The program estimates calculated in Percipio provide financial metrics on how learning impacts your organization in terms of the value of improved skills and of productive time saved. These estimates are standardized and are based in part on financial information provided by your organization and your contract value (not including the Compliance component of your contract).

Value of Skill Gain chart

The Value of Skill Gain chart helps your organization gain insight into the increased value each employee is delivering from stronger skills obtained through eLearning. The increases in skill gain can add value in multiple ways, such as increased engagement, reduced voluntary turnover, helping the employee deliver results more consistently, and preparing the employee for more advanced work.

Value of Skill Gain calculation

This calculation is derived using the following formula:

> **When the selected date range is for one month:**
> (# users who accessed the content in a selected month) * (annual salary) * (% of tasks requiring skill) * (% skill gain)

÷ 12 (the number of months in a year) = **Monthly estimate of skill gain per user**.

When the selected date range is for multiple months:
1. Take the monthly estimate of skill gain per user calculation for the first month, and add it to the second month's estimate of skill gain per user calculation.
2. Add that total to the third month's estimate of skill gain per user calculation.
3. Continue adding each month into the last until you've added all monthly estimates of skill gain per user totals together to see your final **Value of Skill Gain** estimate.

The values applied to model the Value of Skill Gain in Percipio are derived from Skillsoft's Impact Benchmarks, salary information provided by your organization, and an industry standard adjustment for self-reporting bias.

- **% of tasks requiring skill = 25%**

  Skillsoft's Impact Benchmark for % of tasks requiring skill (relevance) is 50 - 56%. In Percipio, the low end of the range (50%) is reduced to 25% to deliver a conservative estimate. Relevance is used to isolate the impact to that portion of the job to which the improved skills apply to monetize impact for only the portion of the job role the content is affecting.

- **% skill gain = 8%**

  Skillsoft's Impact Benchmark for % of skill gain is 15-17%, varying by business sector. Percipio uses the midpoint of 8% to conservatively estimate the improvement level occurring across your user population.

- **Annual salary = variable**

  This model uses the average annual salary listed on your **SETTINGS > Site Configuration** page in Percipio Admin. The default value is $50,000 USD.

How is Skill Gain determined?

In this example, we have a Skill Gain of $63,750 over a selected date range of Jan 2019 - April 2019:

To calculate this number:

1. Determine how many users accessed content in the first month of your filtered data. (This number is available via the Learner Activity report.)

   In this example: In January of 2019, **135** users accessed content.

2. Multiply the number of users accessing the content by the average annual salary.

   In this example: The average annual salary is set to **$50,000**.

   135 * 50,000 = $6,750,000

3. Multiply that total by **25%** (the % of tasks requiring skill).

   In this example: 6,750,000 * .25 = $1,687,500

4. Multiply that total by **8%** (the % skill gain).

   In this example: $1,687,500 * .08 = $135,000

5. Divide this total by **12** (the number of months in a year).

   In this example: $135,000 / 12 = $11,250

You're left with you monthly Skill Gain value for January of $11,250.

Next, repeat that formula for February, and add it to the January Skill Gain total. In this example, in February 2019:

240 users accessed content * the average annual salary that was set to **$50,000** = $12,000,000.

$12,000,000 * 25% (the % of tasks requiring skill) = $3,000,000

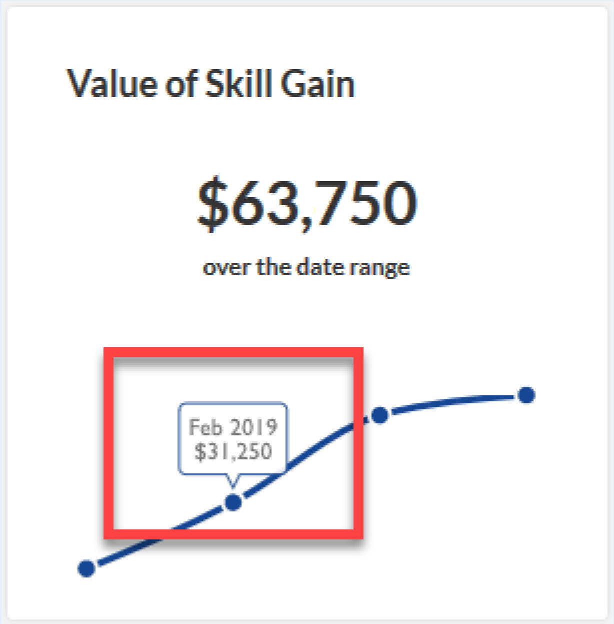
$3,000,000 * 8% (the % skill gain) = $240,000

$240,000 / 12 (the number of months in a year) = $20,000

Now that you have February's total, add it to January's total to get your cumulative total Skill Gain for both months:

$20,000 + $11,250 = $31,250

The cumulative total displays on your chart at the February point:



Repeat this formula for all months in your chart, adding each total to the next month, to see your total Skill Gain number for your selected date range. In the example above, the total Skill Gain number for the selected date range (Jan - Apr) is $63,750.

Impact to Salary Hours chart

The Impact to Salary Hours chart provides insight into the value of protecting productive work time across your organization by increasing the efficiency of training delivery through eLearning. The model is based on a globally accepted industry standard that instructor-led delivery takes twice as much time to deliver the same content as eLearning[1].

Example: Four hours of instructor-led content is delivered via elearning in 2 hours. The time savings result is 2 hours of productive time. If the employee earns $100 per hour, the value of the time saved is $200 in productive work time, now available to the employee.

Impact to Salary calculation

This calculation is derived using the following formula:

(# total hours of eLearning recorded in Percipio) * (average hourly salary**) = **Value of training time using eLearning**
(Value of training time using eLearning) * 2 = **Cost of equivalent Instructor-Led training**
(Cost of equivalent Instructor-Led training) - (Value of training time using eLearning) = **Impact to Salary Hours estimate**

**average hourly salary is roughly calculated as (40 hours/week * 50 weeks/year) / annual salary specified in Settings

The values applied to model Impact to Salary Hours in Percipio are derived from industry standard comparisons of instructor-led and eLearning delivery times and annual salary information.

- **# total hour of eLearning recorded in Percipio:** For the time frame given, the total number of hours of eLearning consumed and recorded in Percipio. Estimated Duration as reflected in the description of how each content asset consumed, is used to calculate this figure.

Total Benefit chart

The Total Benefits chart helps you gain insight into the combined value of improving skills and protecting productive work time by increasing the speed of training delivery using eLearning.

Total Benefits calculation

This calculation is derived using the following formula:

> (Value of Skill Gain estimate) + (Impact to Salary Hours estimate) = Total Benefits estimate

The values applied to model Total Benefit in Percipio are derived from adding the **Value of Skill Gain** and **Impact to Salary Hours** estimates.

Benefit-to-Ratio chart

The Benefit-to-Cost Ratio estimate helps you weigh program benefits against program costs for the purpose of gauging overall impact and success of your organization's eLearning investment. The Benefit-to-Cost estimate suggests a monetized return value for every $1 USD invested.

Benefit-to-Cost Ratio calculation

This calculation is derived using the following model:

> (Total Benefits estimate) ÷ (Skillsoft investment) = **Benefit-to-Cost Ratio**

The values applied to model Benefit-to-Cost Ratio in Percipio are derived from dividing Total Benefit estimate for the time period specified by your Skillsoft investment (contract value) prorated for the time period specified in your filters.

About estimates

Estimating the credible impact of a training program can be difficult. Just as the impact of an advertising program can never be known precisely, calculating the true value of learning is equally as complicated. However, reasonable estimates are a generally accepted technique for measuring learning impact as well as for decision-making in other parts of your organization. Sales forecasts, growth estimates and similar analysis are used daily to make choices about how dollars should be spent. Similarly, the estimates included in Percipio's

Value Dashboard are not intended to provide an exact impact figure; they are designed to produce reasonable analysis based on conservative assumptions derived from Skillsoft's value benchmarks and your organization's adoption data.

Standard adjustment: 50%

Skillsoft's current Impact Benchmarks are derived from self-reported data collected from more than 30,000 actual end users of Skillsoft content in 2014-2015. The goal of Percipio's Value Dashboards is to deliver a credible monetized estimate of value without overstating the effect. Since your users have not provided the relevance and skill gain estimates as they would through a formal impact analysis, the benchmarks in Percipio's Value Dashboard are adjusted by 50% to ensure no over-estimation of value.

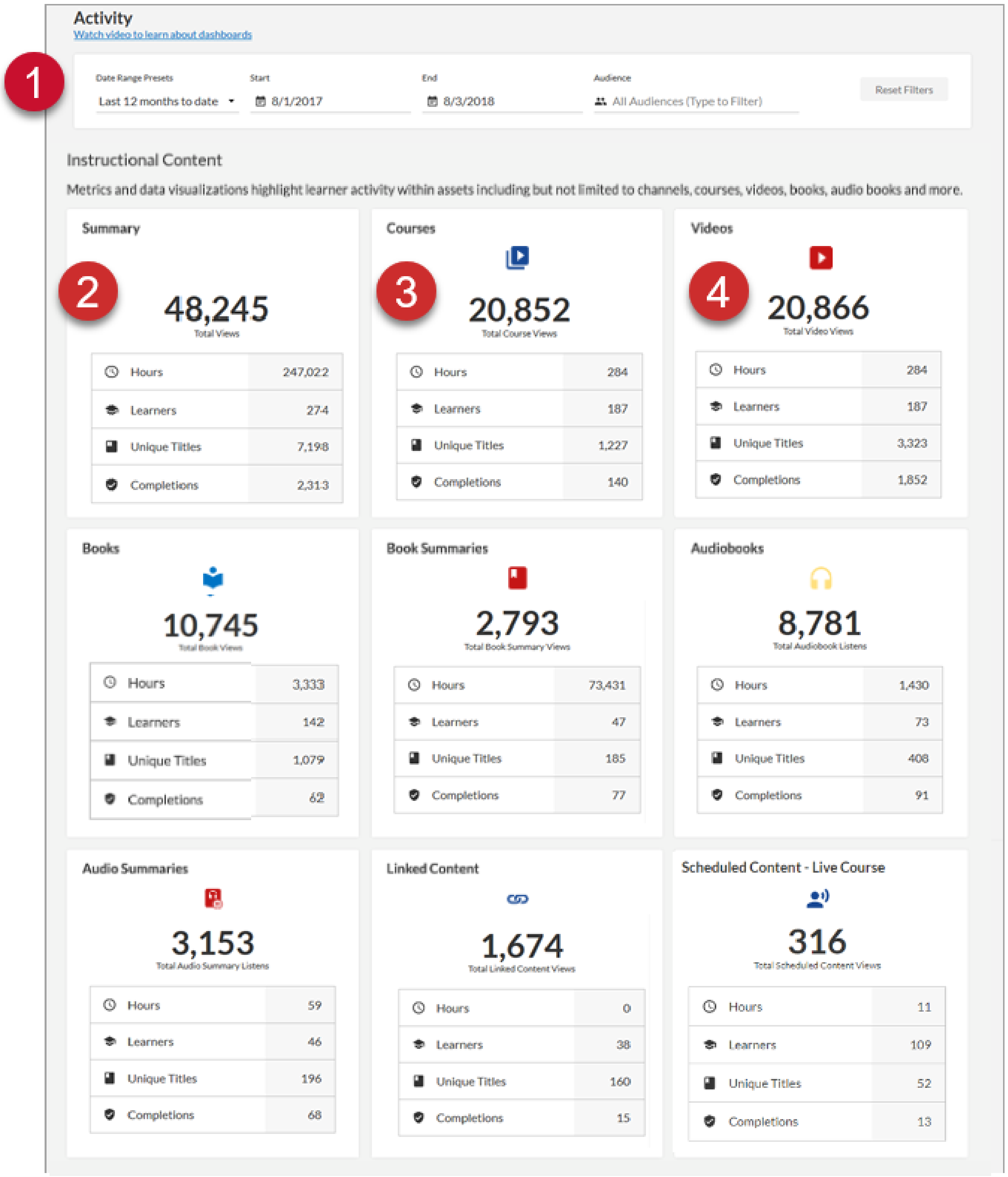
1

Skillsoft cites Karl M. Kapp's compilation of studies to support this 2x factor.

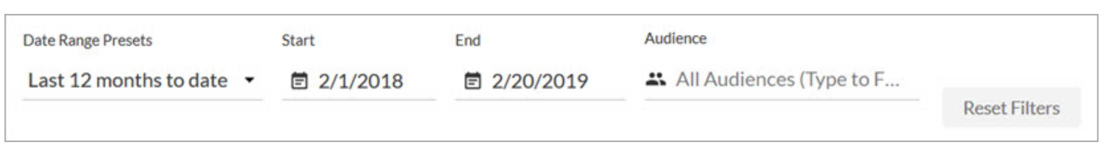
Activity Dashboard

The Activity dashboard provides key metrics on how utilization progresses for each type of learning modality. You can filter this dashboard by date range and audience to assist in understanding learning trends. Each content type (such as courses and books) has its own table to show you more detailed data.

> **Note:** How a learner accesses an asset impacts the data presented in this dashboard.



1. **Filters**



You can filter data on this dashboard by date and audience.

- **Date filters:** Use these to specify the data on your Activity dashboard.

- **Date Range Presets:** Filters the data by a specified range of dates from the drop-down list.
- **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
- **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

Example:
If you set the date to **Start** on September 1 and **End** on October 1, only the platform data within the September 1 - October 1 time period is shown.

- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.

2. **Summary table**

The Summary table provides a complete overview of all the activity in Percipio across the different types of content.

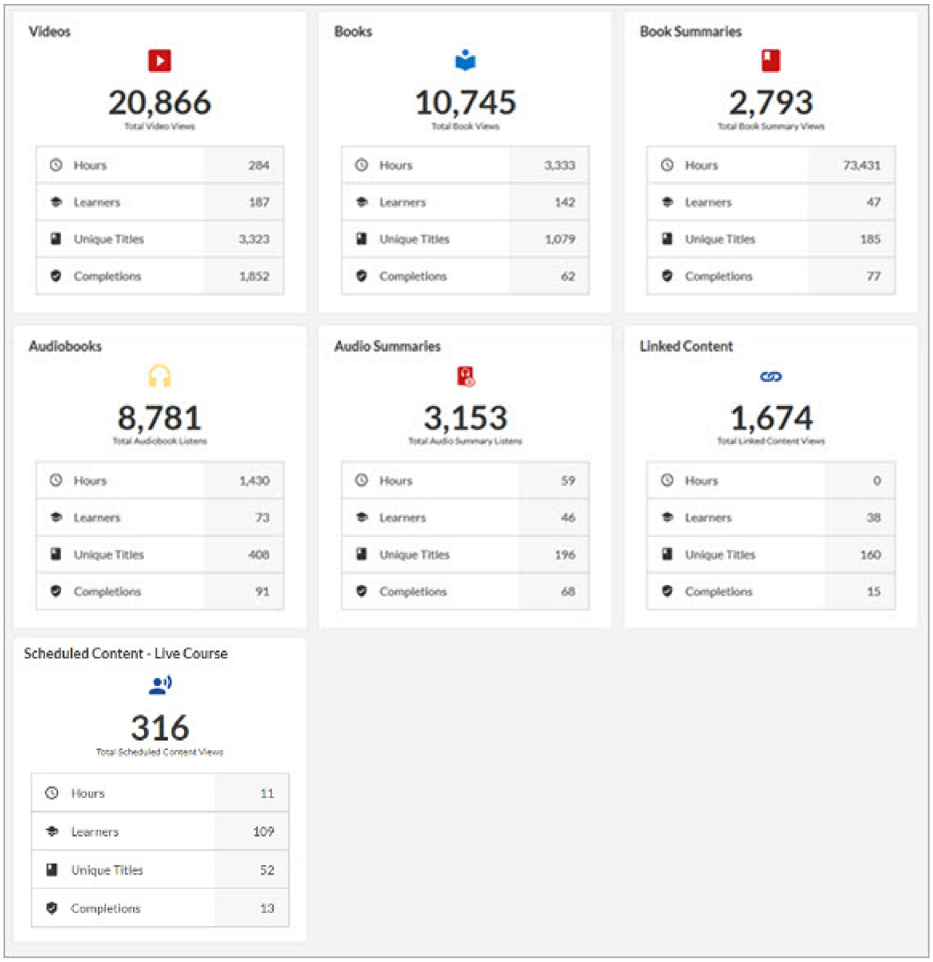
- **Total Views:** The number of unique learner visits in Percipio (for example, if a learner accesses a page on Tuesday, then again on Thursday, that counts for 2 unique visits).
- **Hours:** The total number of hours spent on content including courses, books, book summaries, audiobooks, and audio summaries, (videos are tracked as part of courses, not separately).
- **Learners:** The number of distinct learners accessing the asset types.
- **Unique Titles:** The total number of distinct assets (titles) accessed by learners.
- **Completions:** The total number of completions for all asset types.

3. **Courses table**

The Courses table provides an overview of course-related activity in Percipio. Activity for courses reflects the time spent in videos and assessments.

- **Total Views:** The number of unique video views in Percipio courses. All videos are inside of courses. If a learner launches a video, the dashboard shows that activity in the Videos table, and that rolls up into the Courses table. Time is not double-counted based on different kinds of activity.
- **Hours:** The total number of hours spent on videos only. If a learner accesses a course assessment but does not launch a video, activity is reflected for the number of learners, but not for hours.
- **Learners:** The number of distinct learners who have launched a video in a course, or launched a course assessment.
- **Unique Titles**: Number of unique courses that have had a video or assessment launched.
- **Completions:** The total number of course completions across Percipio.

4. **Content type tables**



These tables include activity for specific content types: videos, books, book summaries, audiobooks, audio summaries, linked content, and scheduled content. Linked content includes labs and TestPreps along with custom content linked items. Scheduled content includes all live course (ILT) items you configured. (Other activities in Percipio that are described as practice, such as within the Leadership Development Program area, are not included here.)

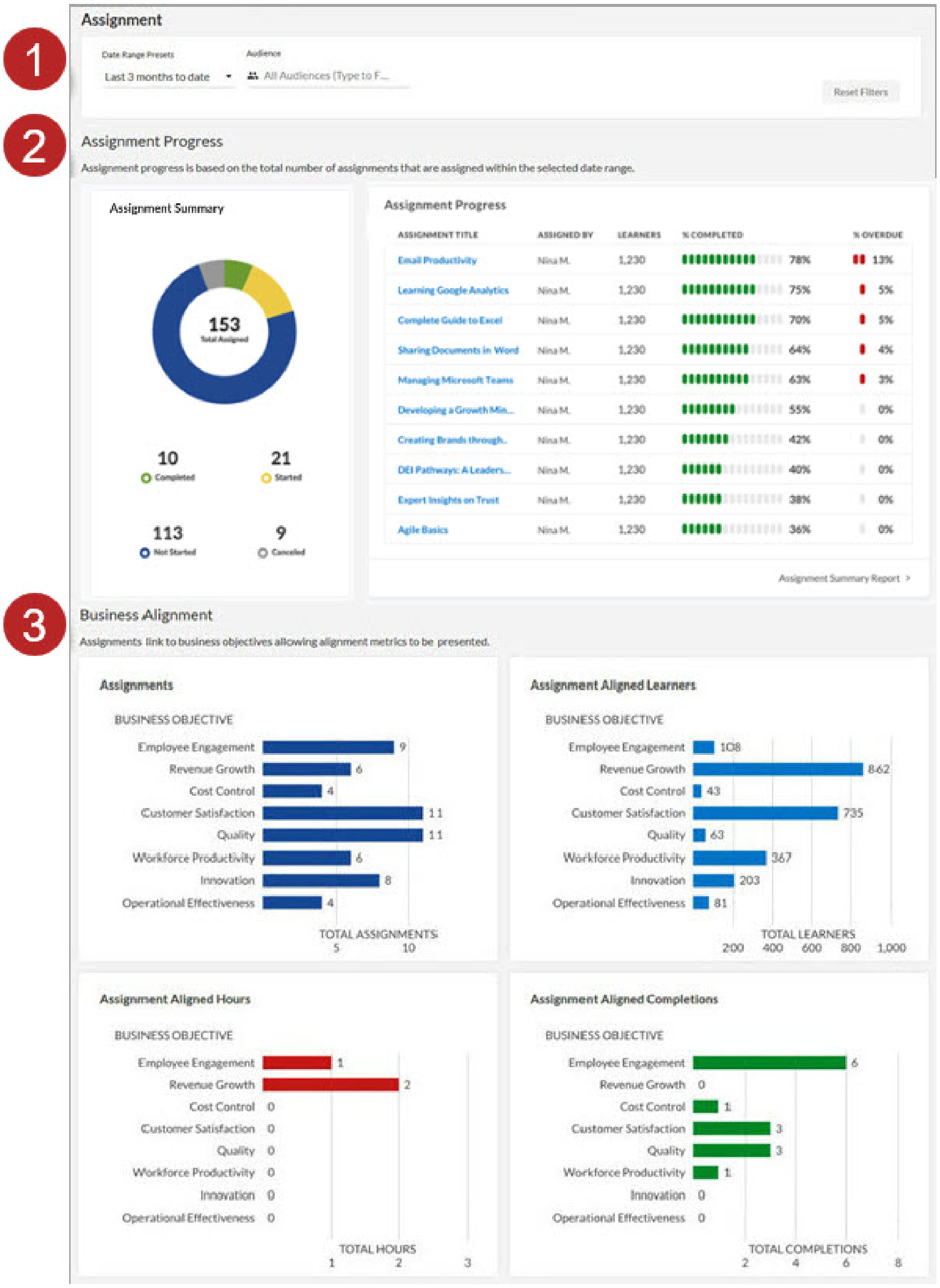
- **Total Views**: The number of unique asset-specific views.
- **Hours**: The total number of hours spent engaging with the specific asset type, except for linked custom content items

that are not track-able. Also, all videos are inside of courses. If a learner launches a video, the dashboard shows that activity in the Videos table, and that rolls up into the Courses table.

- **Learners:** The number of distinct learners who have launched the specified content type.
- **Unique Titles**: The number of the specific asset type accessed by learners.
- **Completions**: The number of asset-type completions by learners.

Assignments Dashboard

The Assignments dashboard provides insight into your assignments (including your learner engagement and associated business objectives) across your Percipio site.



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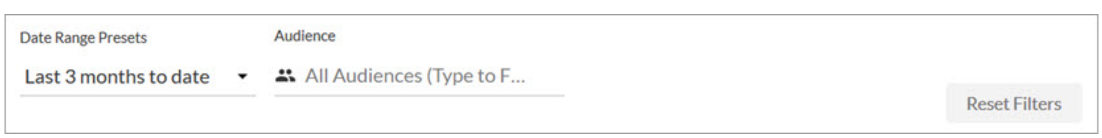


You can filter data on this dashboard by date range and audience.

- **Date Range Presets:** Filters the data by a specified range of dates from the drop-down list.
- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.

2. **Assignment Progress charts**

   Assignment progress is based on the total number of assignments that are assigned within the selected date range. This does not include canceled assignments.

   - **Assignment Summary:** A summary of all assigned learning in your organization. The chart displays what assigned content has been completed, started, not started, and canceled.
   - **Assignment Progress:** The progress of top 10 assignments as determined by the number of learners assigned. The chart displays the assignment names, the number of learners assigned a particular assignment, who assigned it, the percentage of learners that have completed it, and the percent of learners that are overdue. If you select the hyperlinked assignment title you see the Assignment detail report for that assignment with the same filters selected as on this page.
   - **Assignment Summary Report**: Select this link to view the summary information for all assignments.

3. **Business Alignment charts**

The Business Alignment charts provide insight into how assigned learning is tracking against strategic business objectives within your organization. No canceled assignments are included in the data.

- **Assignments:** The number of assignments associated with each business objective. Business objectives are selected when you create a new assignment.
- **Assignment Aligned Learners:** The number of individual users that have an assignment associated with each business objective.
- **Assignment Aligned Hours:** The number of hours learners have spent in assignments associated with each business objective.
- **Assigned Aligned Completions:** The total number of assignment completions associated with each business objective.

Dashboards

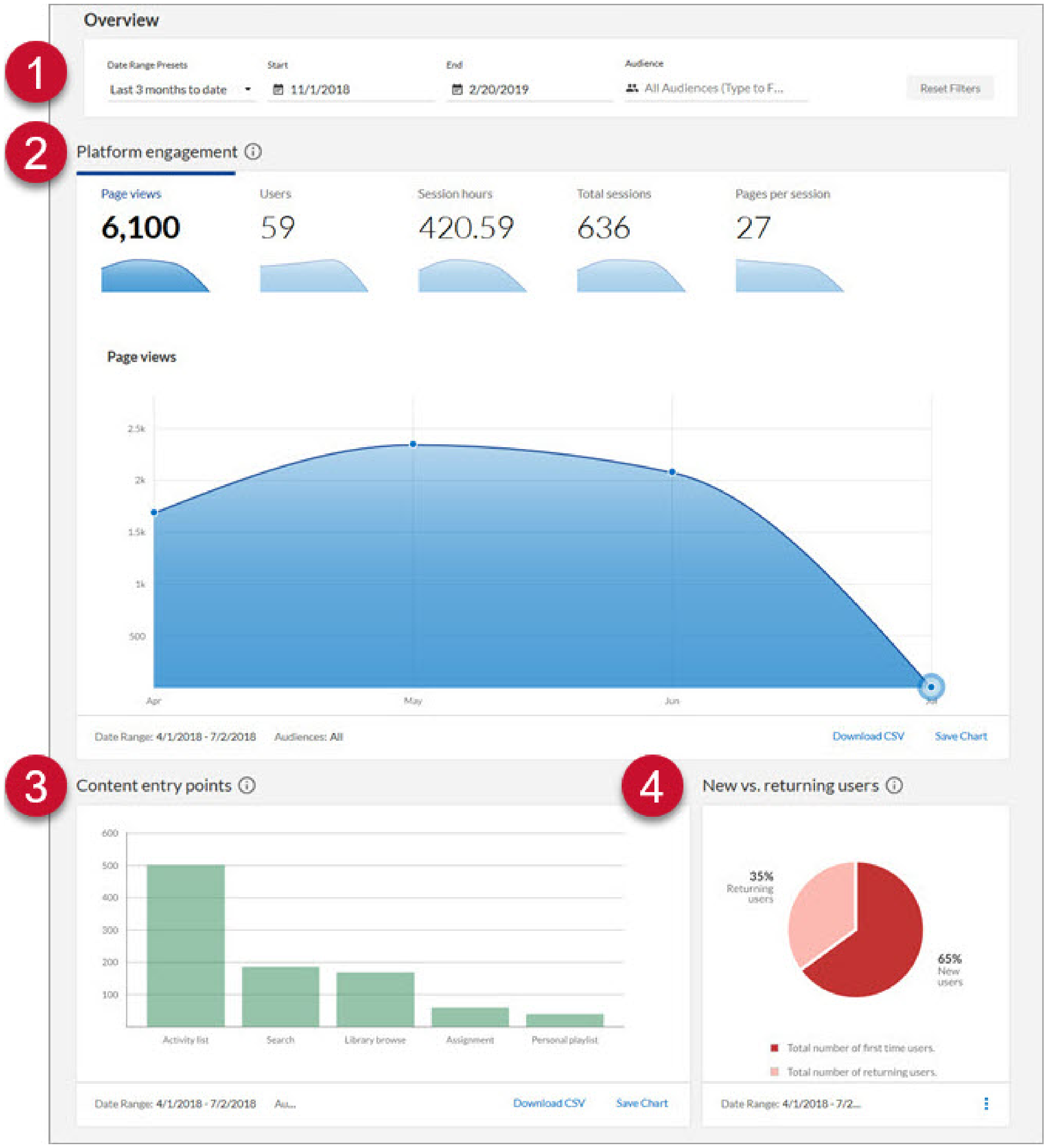
Dashboards provide metrics related to user activity within Percipio and the status of key operational functions.

- **Overview:** The Overview dashboard displays several metrics on how learners interact with the Percipio platform.
- **Activity:** The Activity dashboardprovides key metrics on how utilization progresses for each type of learning modality. You can filter this dashboard by date range and audience to assist in understanding learning trends.
- **Program Value:** The Program Value dashboard provides insight into your eLearning program. The highly visual metrics, along with the detailed reports, deliver important information that you can use to understand and manage your organization's learning hours and estimated program value.
- **Assignments:** The Assignments dashboard provides insight into the assignments (including your learner engagement and associated business objectives) across your Percipio site.
- **Skill Benchmarks:** The Skill Benchmarks dashboard shows a visual summary of your organization's proficiency for different skills.
- **Skills Discovery:** The Skills Discovery dashboard gives you valuable insight into how your learners are exploring content on Percipio. The sections of the dashboard show what learners are searching for and the skills they are choosing during their onboarding.
- **Skills Activity:**The Skills Activity dashboard provides insight into how skills are being developed within your organization and answers the following questions: Which skills are being learned by your employees? Which employees are most engaged in learning specific skills? Which titles are most often being used to learn specific skills?

- **Executive:** The Executive dashboard is a framework for showing value and providing insights about learning success. It is designed to show how your people are moving from adoption through to achievement.
- **Career Journey:** The Career Journey dashboard provides valuable insight into how your users are using Career Journeys.

Overview Dashboard

The Overview dashboard displays several metrics about how your learners are interacting with the Percipio platform.



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You can filter data on this dashboard by date and audience.

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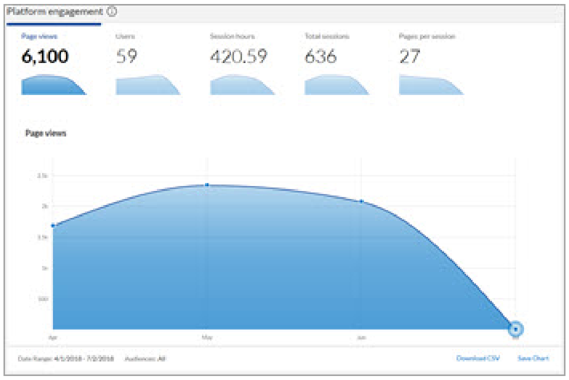

Platform engagement shows several charts related to overall usage in Percipio. When you select one of the individual metric charts, the larger graphic updates to reflect the selected data.

- **Page views:** Total number of platform page views for all users during the selected time frame. A page view is counted each time a user accesses a page within Percipio (whether it be through navigating through Percipio or using search).
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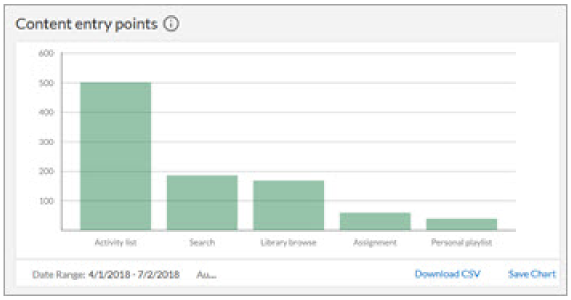
- **Users:** Total number of unique users accessing the platform during the selected time frame. Each user is counted only once, regardless of how many times they accessed the site.
  - For example, if a learner signs in to Percipio four times within the specified date range, only one visit for this learner is included in this calculation.
- **Session hours:** Total time users spent engaged with the platform during the selected time frame.

- **Total sessions:** Total number of sessions during the selected time frame. This is not user-specific.
  - For example, if a learner signs into Percipio four times within the specified date range, all four sessions are included in this calculation.
  - You can configure how long a learner can stay logged into a session from the Settings, Site Configuration option.
- **Pages per session:** Average number of platform page views per user during a single session during the selected time frame.
  - For example, if a learner signs in to Percipio three times during the specified time frame, and visited six pages during the first session, four pages during the second session, and eight pages during the third session, the average number of platform page views would be six (6 page views + 4 page views + 8 pages views = 18 page views. When those 18 page views are divided by the total number of sessions for the user – in this case, 3 – the average number is six.

To save or download this chart, see Working with the Overview dashboard charts.

3. **Content entry points chart**



This chart displays the frequency in which learners viewed each of these content access points within Percipio.

- **Activity list:** Total number of time users accessed their Activity page.
- **Assignment:** Total number of times users accessed the assignment.
- **Library browse:** Total number of times users accessed browsing the library.
- **Personal playlist:** Total number of times users accessed the Personal playlist.
- **Search:** Total number of times users accessed search.

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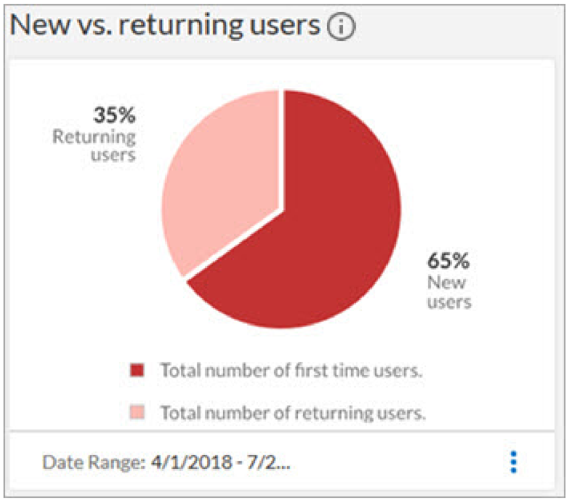
4. **New vs. returning users chart**



This chart displays the percentage of new versus returning users. A new user is one who logged in for the first time within the specified date range. A returning user is one who logged in prior to the specified date range AND viewed at least one page within the specified date range.

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Working with the Overview dashboard charts

Save a chart

All charts on the Overview dashboard have a **Save chart** option, which saves the chart as a .PNG file for use in other documents (such as a slide presentation).

For most browsers

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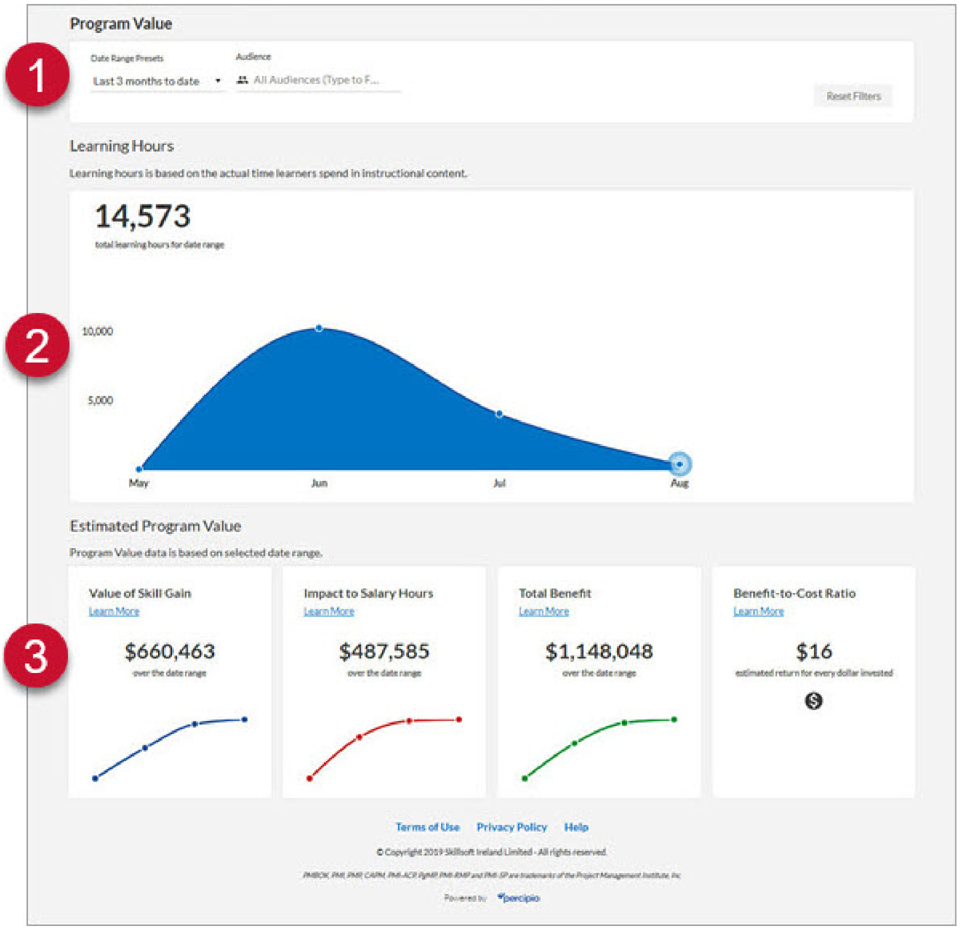
2. Follow your browser's prompts to save the file.

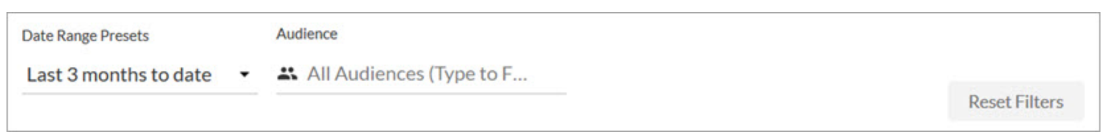
Program Value Dashboard

The Program Value dashboard provides insight into your eLearning program. The highly visual metrics, along with the detailed reports, deliver important information that you can use to understand and manage your organization's learning hours and estimated program value.



1.

Filters



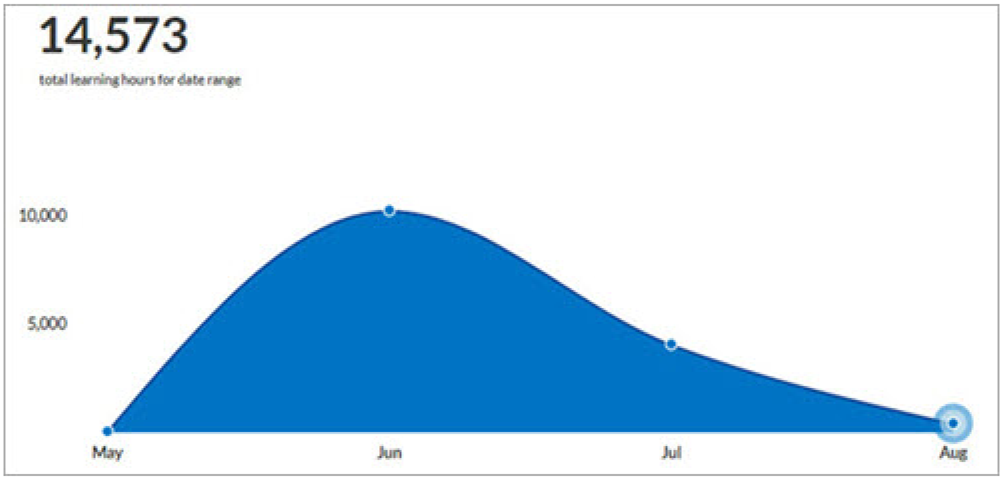
You can filter data on this dashboard by date range and audience.

- **Date Range Presets:** Filters the data by a specified range of dates from the drop-down list.
- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display

the data for multiple audiences at the same time by entering more than one audience name.

2.

Learning Hours chart



Learning hours are based on the actual time learners spend in instructional content. The Learning Hours chart is a view into the total learning hours for your organization. This important metric includes time the learner spent within any of the instructional content (including courses, books, book summaries, audiobooks, audio summaries, labs, TestPreps, tests, live courses (scheduled content), and videos).

3. **Estimated Program Value chart**

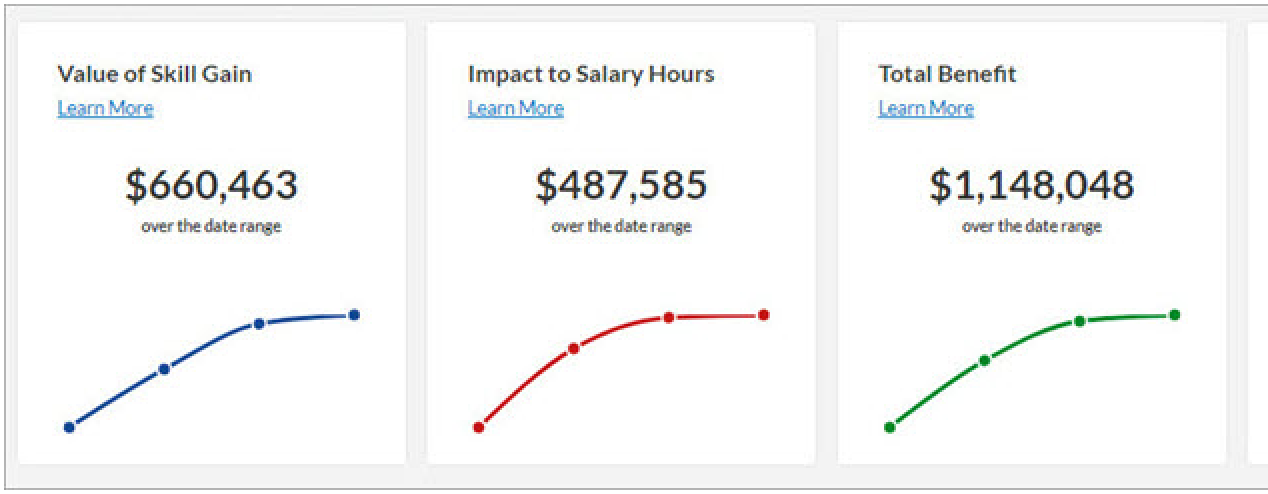
The Estimated Program Value charts help you gain insight into the ongoing value to your organization accrued through the use of Skillsoft content solutions. The program estimates calculated in Percipio provide financial metrics on how learning impacts your organization in terms of the value of improved skills and of productive time saved. These estimates are standardized and are based in part on financial information provided by your organization and your contract value (not including the Compliance component of your contract).

See Estimated Program Value Charts for detailed information about each of these charts, and about how estimates and adjustments are calculated.

> **Note**: Compliance contract values are not included in the contract values being passed to Percipio for these dashboard calculations.

Estimated Program Value Charts

The Estimated Program Value charts help you gain insight into the ongoing value to your organization accrued through the use of Skillsoft content solutions. The program estimates calculated in Percipio provide financial metrics on how learning impacts your organization in terms of the value of improved skills and of productive time saved. These estimates are standardized and are based in part on financial information provided by your organization and your contract value (not including the Compliance component of your contract).



Value of Skill Gain chart

The Value of Skill Gain chart helps your organization gain insight into the increased value each employee is delivering from stronger skills obtained through eLearning. The increases in skill gain can add value in multiple ways, such as increased engagement, reduced voluntary turnover, helping the employee deliver results more consistently, and preparing the employee for more advanced work.

Value of Skill Gain calculation

This calculation is derived using the following formula:

When the selected date range is for one month:
(# users who accessed the content in a selected month) * (annual salary) * (% of tasks requiring skill) * (% skill gain)

÷ 12 (the number of months in a year) = **Monthly estimate of skill gain per user**.

When the selected date range is for multiple months:

1. Take the monthly estimate of skill gain per user calculation for the first month, and add it to the second month's estimate of skill gain per user calculation.
2. Add that total to the third month's estimate of skill gain per user calculation.
3. Continue adding each month into the last until you've added all monthly estimates of skill gain per user totals together to see your final **Value of Skill Gain** estimate.

The values applied to model the Value of Skill Gain in Percipio are derived from Skillsoft's Impact Benchmarks, salary information provided by your organization, and an industry standard adjustment for self-reporting bias.

- **% of tasks requiring skill = 25%**

  Skillsoft's Impact Benchmark for % of tasks requiring skill (relevance) is 50 - 56%. In Percipio, the low end of the range (50%) is reduced to 25% to deliver a conservative estimate. Relevance is used to isolate the impact to that portion of the job to which the improved skills apply to monetize impact for only the portion of the job role the content is affecting.

- **% skill gain = 8%**

  Skillsoft's Impact Benchmark for % of skill gain is 15-17%, varying by business sector. Percipio uses the midpoint of 8% to conservatively estimate the improvement level occurring across your user population.

- **Annual salary = variable**

  This model uses the average annual salary listed on your **SETTINGS > Site Configuration** page in Percipio Admin. The default value is $50,000 USD.

How is Skill Gain determined?

In this example, we have a Skill Gain of $63,750 over a selected date range of Jan 2019 - April 2019:

To calculate this number:

1. Determine how many users accessed content in the first month of your filtered data. (This number is available via the Learner Activity report.)

In this example: In January of 2019, **135** users accessed content.

2. Multiply the number of users accessing the content by the average annual salary.

   In this example: The average annual salary is set to **$50,000**.

   135 * 50,000 = $6,750,000

3. Multiply that total by **25%** (the % of tasks requiring skill).

   In this example: 6,750,000 * .25 = $1,687,500

4. Multiply that total by **8%** (the % skill gain).

   In this example: $1,687,500 * .08 = $135,000

5. Divide this total by **12** (the number of months in a year).

   In this example: $135,000 / 12 = $11,250

You're left with you monthly Skill Gain value for January of $11,250.

Next, repeat that formula for February, and add it to the January Skill Gain total. In this example, in February 2019:

240 users accessed content * the average annual salary that was set to **$50,000** = $12,000,000.

$12,000,000 * 25% (the % of tasks requiring skill) = $3,000,000

$3,000,000 * 8% (the % skill gain) = $240,000

$240,000 / 12 (the number of months in a year) = $20,000

Now that you have February's total, add it to January's total to get your cumulative total Skill Gain for both months:

$20,000 + $11,250 = $31,250

The cumulative total displays on your chart at the February point:

Repeat this formula for all months in your chart, adding each total to the next month, to see your total Skill Gain number for your selected date range. In the example above, the total Skill Gain number for the selected date range (Jan - Apr) is $63,750.

Impact to Salary Hours chart

The Impact to Salary Hours chart provides insight into the value of protecting productive work time across your organization by increasing the efficiency of training delivery through eLearning. The model is based on a globally accepted industry standard that instructor-led delivery takes twice as much time to deliver the same content as eLearning[1].

Example: Four hours of instructor-led content is delivered via elearning in 2 hours. The time savings result is 2 hours of productive time. If the employee earns $100 per hour, the value of the time saved is $200 in productive work time, now available to the employee.

Impact to Salary calculation

This calculation is derived using the following formula:

(# total hours of eLearning recorded in Percipio) * (average hourly salary**) = **Value of training time using eLearning**

(Value of training time using eLearning) * 2 = **Cost of equivalent Instructor-Led training**

(Cost of equivalent Instructor-Led training) - (Value of training time using eLearning) = **Impact to Salary Hours estimate**

**average hourly salary is roughly calculated as (40 hours/week * 50 weeks/year) / annual salary specified in Settings

The values applied to model Impact to Salary Hours in Percipio are derived from industry standard comparisons of instructor-led and eLearning delivery times and annual salary information.

- **# total hour of eLearning recorded in Percipio:** For the time frame given, the total number of hours of eLearning consumed and recorded in Percipio. Estimated Duration as reflected in the description of how each content asset consumed, is used to calculate this figure.

Total Benefit chart

The Total Benefits chart helps you gain insight into the combined value of improving skills and protecting productive work time by increasing the speed of training delivery using eLearning.

Total Benefits calculation

This calculation is derived using the following formula:

> (Value of Skill Gain estimate) + (Impact to Salary Hours estimate) = Total Benefits estimate

The values applied to model Total Benefit in Percipio are derived from adding the **Value of Skill Gain** and **Impact to Salary Hours** estimates.

Benefit-to-Ratio chart

The Benefit-to-Cost Ratio estimate helps you weigh program benefits against program costs for the purpose of gauging overall impact and success of your organization's eLearning investment. The Benefit-to-Cost estimate suggests a monetized return value for every $1 USD invested.

Benefit-to-Cost Ratio calculation

This calculation is derived using the following model:

> (Total Benefits estimate) ÷ (Skillsoft investment) = **Benefit-to-Cost Ratio**

The values applied to model Benefit-to-Cost Ratio in Percipio are derived from dividing Total Benefit estimate for the time period specified by your Skillsoft investment (contract value) prorated for the time period specified in your filters.

About estimates

Estimating the credible impact of a training program can be difficult. Just as the impact of an advertising program can never be known precisely, calculating the true value of learning is equally as complicated. However, reasonable estimates are a generally accepted technique for measuring learning impact as well as for decision-making in other parts of your organization. Sales forecasts, growth estimates and similar analysis are used daily to make choices about how dollars should be spent. Similarly, the estimates included in Percipio's Value Dashboard are not intended to provide an exact impact figure; they are designed to produce reasonable analysis based on conservative assumptions derived from Skillsoft's value benchmarks and your organization's adoption data.

Standard adjustment: 50%

Skillsoft's current Impact Benchmarks are derived from self-reported data collected from more than 30,000 actual end users of Skillsoft content in 2014-2015. The goal of Percipio's Value Dashboards is to deliver a credible monetized estimate of value without overstating the effect. Since your users have not provided the relevance and skill gain estimates as they would through a formal impact analysis, the benchmarks in Percipio's Value Dashboard are adjusted by 50% to ensure no over-estimation of value.

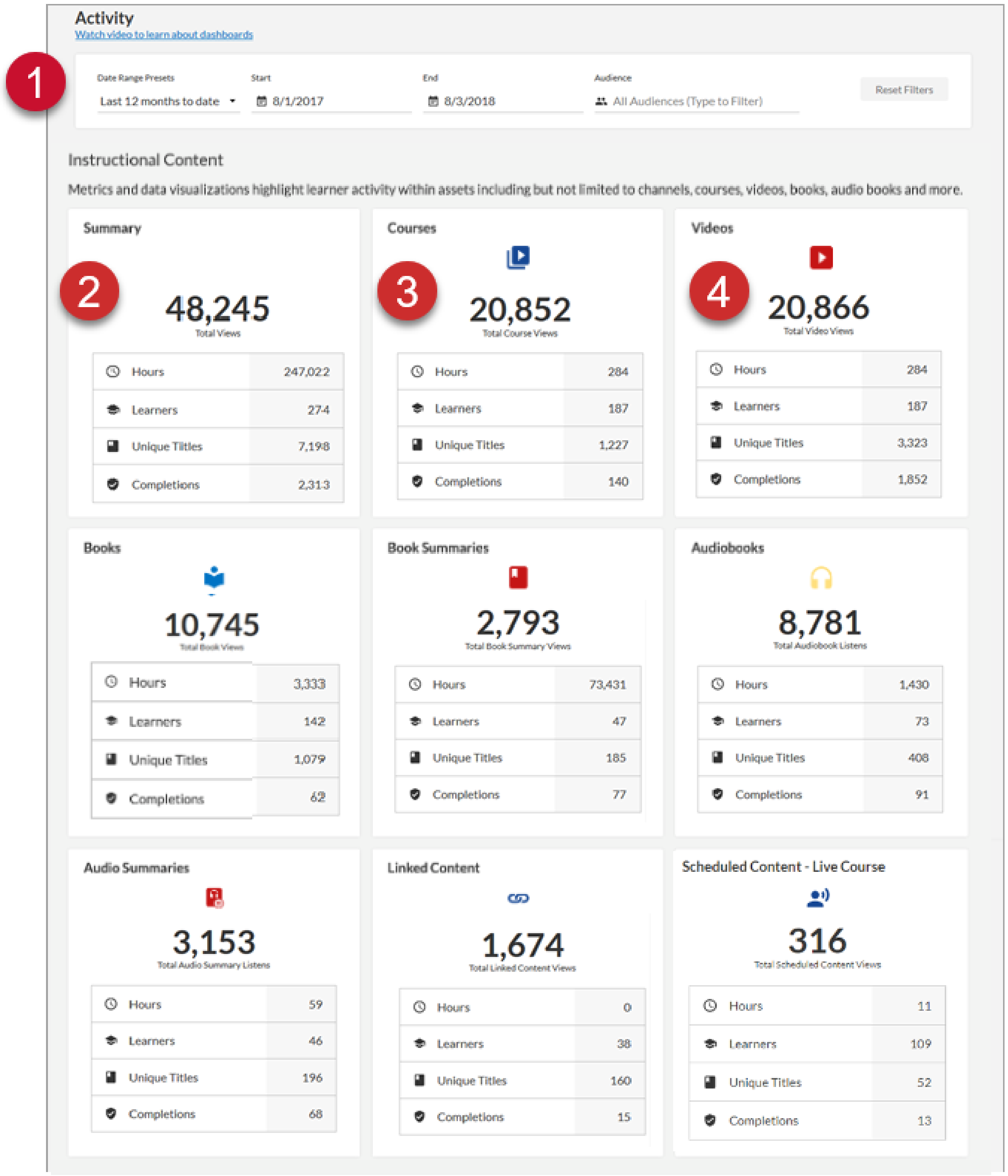
1

Skillsoft cites Karl M. Kapp's compilation of studies to support this 2x factor.

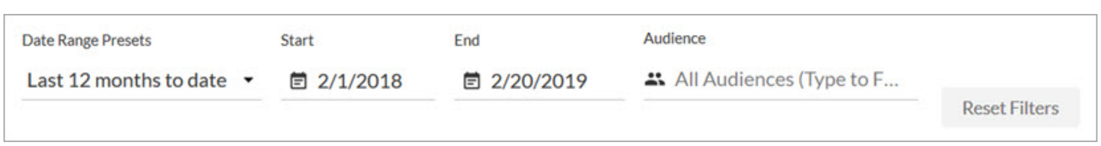
Activity Dashboard

The Activity dashboard provides key metrics on how utilization progresses for each type of learning modality. You can filter this dashboard by date range and audience to assist in understanding learning trends. Each content type (such as courses and books) has its own table to show you more detailed data.

> **Note:** How a learner accesses an asset impacts the data presented in this dashboard.



1. **Filters**



You can filter data on this dashboard by date and audience.

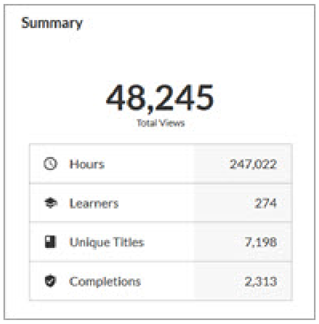
- **Date filters:** Use these to specify the data on your Activity dashboard.

- **Date Range Presets:** Filters the data by a specified range of dates from the drop-down list.
- **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
- **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

Example:
If you set the date to **Start** on September 1 and **End** on October 1, only the platform data within the September 1 - October 1 time period is shown.

- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.

2. **Summary table**



The Summary table provides a complete overview of all the activity in Percipio across the different types of content.

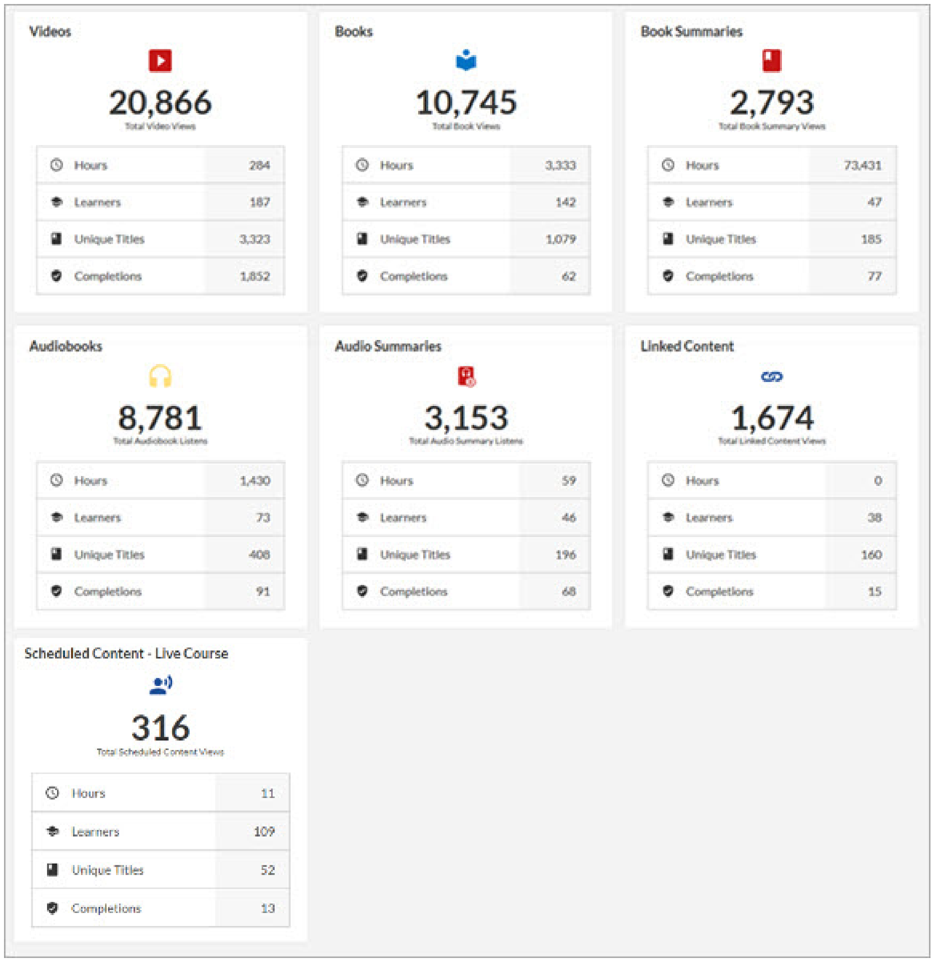
- **Total Views:** The number of unique learner visits in Percipio (for example, if a learner accesses a page on Tuesday, then again on Thursday, that counts for 2 unique visits).
- **Hours:** The total number of hours spent on content including courses, books, book summaries, audiobooks, and audio summaries, (videos are tracked as part of courses, not separately).
- **Learners:** The number of distinct learners accessing the asset types.
- **Unique Titles:** The total number of distinct assets (titles) accessed by learners.
- **Completions:** The total number of completions for all asset types.

3. **Courses table**

The Courses table provides an overview of course-related activity in Percipio. Activity for courses reflects the time spent in videos and assessments.

- **Total Views:** The number of unique video views in Percipio courses. All videos are inside of courses. If a learner launches a video, the dashboard shows that activity in the Videos table, and that rolls up into the Courses table. Time is not double-counted based on different kinds of activity.
- **Hours:** The total number of hours spent on videos only. If a learner accesses a course assessment but does not launch a video, activity is reflected for the number of learners, but not for hours.
- **Learners:** The number of distinct learners who have launched a video in a course, or launched a course assessment.
- **Unique Titles**: Number of unique courses that have had a video or assessment launched.
- **Completions:** The total number of course completions across Percipio.

4. **Content type tables**



These tables include activity for specific content types: videos, books, book summaries, audiobooks, audio summaries, linked content, and scheduled content. Linked content includes labs and TestPreps along with custom content linked items. Scheduled content includes all live course (ILT) items you configured. (Other activities in Percipio that are described as practice, such as within the Leadership Development Program area, are not included here.)

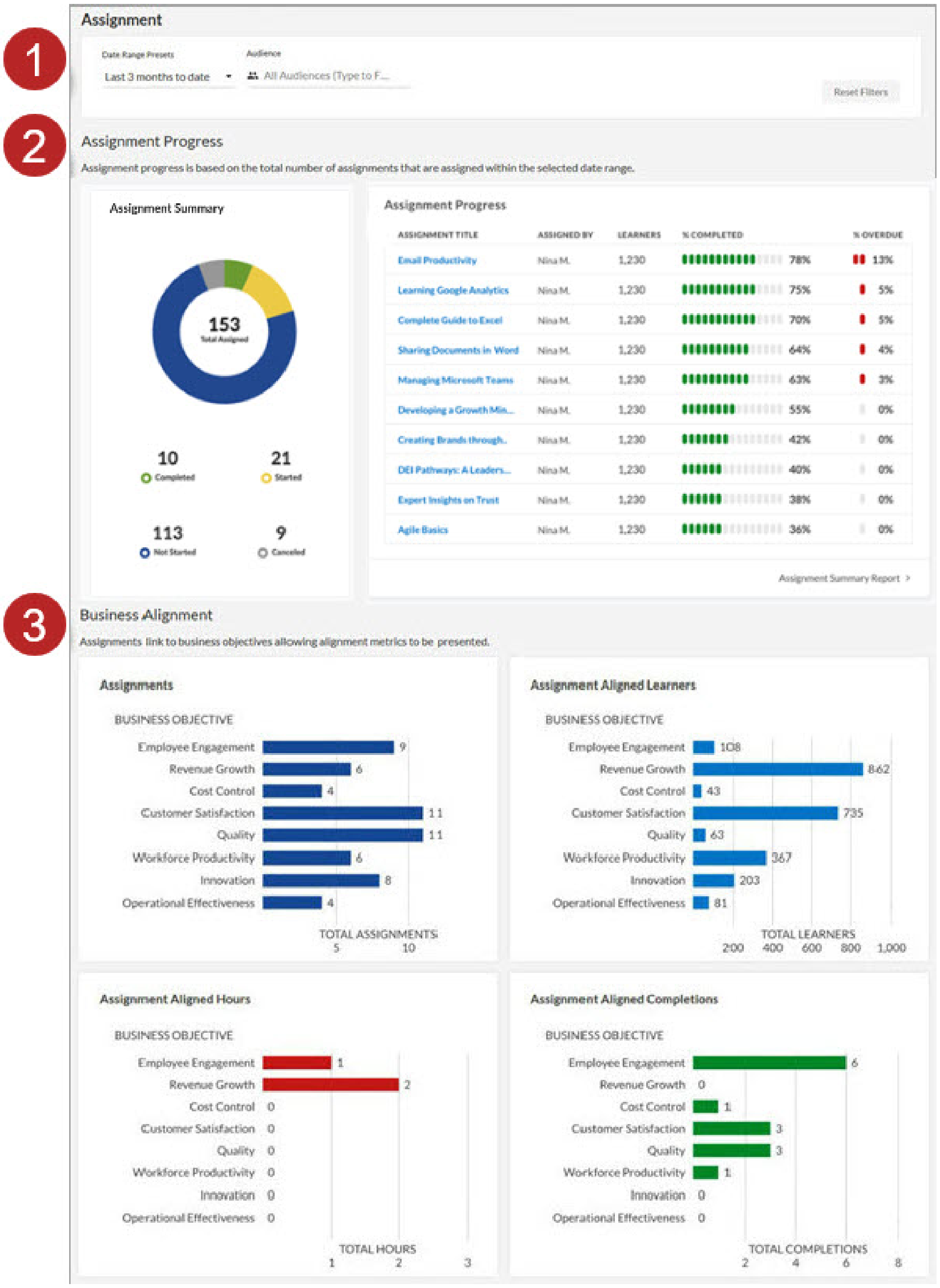
- **Total Views**: The number of unique asset-specific views.
- **Hours**: The total number of hours spent engaging with the specific asset type, except for linked custom content items

that are not track-able. Also, all videos are inside of courses. If a learner launches a video, the dashboard shows that activity in the Videos table, and that rolls up into the Courses table.

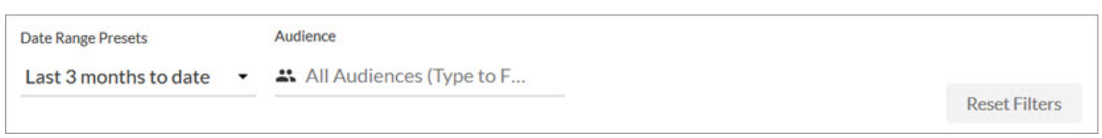
- **Learners:** The number of distinct learners who have launched the specified content type.
- **Unique Titles**: The number of the specific asset type accessed by learners.
- **Completions**: The number of asset-type completions by learners.

Assignments Dashboard

The Assignments dashboard provides insight into your assignments (including your learner engagement and associated business objectives) across your Percipio site.



1. **Filters**



You can filter data on this dashboard by date range and audience.

- **Date Range Presets:** Filters the data by a specified range of dates from the drop-down list.
- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.

2. **Assignment Progress charts**

   Assignment progress is based on the total number of assignments that are assigned within the selected date range. This does not include canceled assignments.

   - **Assignment Summary:** A summary of all assigned learning in your organization. The chart displays what assigned content has been completed, started, not started, and canceled.
   - **Assignment Progress:** The progress of top 10 assignments as determined by the number of learners assigned. The chart displays the assignment names, the number of learners assigned a particular assignment, who assigned it, the percentage of learners that have completed it, and the percent of learners that are overdue. If you select the hyperlinked assignment title you see the Assignment detail report for that assignment with the same filters selected as on this page.
   - **Assignment Summary Report**: Select this link to view the summary information for all assignments.

3. **Business Alignment charts**

The Business Alignment charts provide insight into how assigned learning is tracking against strategic business objectives within your organization. No canceled assignments are included in the data.

- **Assignments:** The number of assignments associated with each business objective. Business objectives are selected when you create a new assignment.
- **Assignment Aligned Learners:** The number of individual users that have an assignment associated with each business objective.
- **Assignment Aligned Hours:** The number of hours learners have spent in assignments associated with each business objective.
- **Assigned Aligned Completions:** The total number of assignment completions associated with each business objective.

Reports

Reports provide several views of operational data that help you analyze activity within Percipio. For any of the reports, you can either view the data online or download it to a CSV file that you can open with a business system such as Microsoft Excel. You can also share reports with users who have Percipio user accounts.

From the **Analytics** menu, you can:

- Access the most common reports
- View all reports: From this view you can:
  - Create a new report template
  - Edit a custom template
  - Delete a custom template
  - Schedule a report
- View downloaded reports: From this view you can:
  - Share reports
  - Remove the downloaded report

> **Note:** Dates in report CSV files are in ISO 8601 format.

Learner Activity Report

The Learner Activity report provides metrics on learner engagement with content and Digital Badges earned. You can filter data by date range, audience, individual user, or asset type. This report shows all learner activity for your organization, and you can view up to 50 actions per page.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

> **Notes:**
> The Learner Activity report CSV file includes a **Content UUID** (universal unique identifier) column.
>
> When the Learner Activity report initially opens, to save load

times, only the first 500 rows of data populate, so the bottom "rows per page" numbers display as "1 - 50 of 500." When you load the next page of results, the total number of rows for the entirety of the report loads and displays at the bottom (for example, "51 of 64660"). All rows in the report, depending on the filters you set, download into the CSV file provided the total number of rows is not greater than 500,000.

If the report contains more than 500,000 rows, the CSV download will limit the download to 500,000 rows. Use the filters to adjust the amount of data shown.

Filters

- **Date filters:** The Date filters apply to the **DURATION**, **FIRST ACCESS**, **LAST ACCESS**, and **TOTAL ACCESSES** columns.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
  - **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

    Example

    > A user accesses a course on September 1 and September 15. They accesses it again on

October 1, when they complete the course. They access it once more on October 15 to review it.

The activity for this user, with **Start** set as September 1 and **End** set as October 15, would look like this:

FIRST ACCESS: September 1
LAST ACCESS: October 15
TOTAL ACCESSES: 4
COMPLETED DATE: October 1
STATUS: Completed

- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.
- **User**: Individual with a Percipio user account. Enter a user's name to filter the report to include that user. You can display data for up to 10 users at the same time by typing in more than one user name.
- **Asset Type**: Default asset type selections include **Audiobook**, **Audio Summary**, **Book**, **Book Summary**, **Course**, **Scheduled content** (for example live course), **Assessment** (for Skill Benchmarks) and **Linked Content**. To include additional content types, click the Asset Type filter field for a drop-down list. To remove a filter, click the to the right of the content type.
- **Language:** Select only one option from the drop-down list. **All Languages** is set by default.

Columns

> **Note:** Each user number-related column is specific to the filtered date range (for example, the FIRST ACCESS date is the first time the user accessed the content within the specified date range, and not necessarily the first time content was accessed.)

The following columns are available in the Learner Activity report:

- **USER ID**: The value entered in the User ID attribute. It is used to identify a user inside Percipio.
- **FIRST NAME**: The value entered in the First name user attribute. Usually the user's first name.
- **LAST NAME**: The value entered in the Last name user attribute. Usually the user's last name.
- **AUDIENCE**: The audience(s) in which users are a member.
- **CONTENT UUID**: This is an internal Percipio code used with third-party learner management systems.
- **CONTENT ID**: Unique identifier for Skillsoft courses and videos.
- **CONTENT TITLE**: The title of the asset.
- **ASSET TYPE**: The type of asset. Asset types may include courses, videos, books, audiobooks, audio summaries, book summaries, scheduled content, assessment, and linked content. When you see the asset type, linked content, it could be associated with any of following Skillsoft items: test preps, labs, bootcamps, live events, partner content, and any custom content items you added. When you see the asset type, scheduled content, it could be associated with any of following Skillsoft items: live courses, bootcamps or leadercamps. View the report online to see the list of asset types available for that report. When you see the asset type, assessment, it is associated with Skill Benchmarks.

- **LANGUAGE:** The language of the asset. Available languages and their codes are listed here.
- **RECURRENCE:** The number of times a learner returned and accessed Skill Benchmark assessments or Skillsoft courses.
- **TECHNOLOGY TITLE**: The title of the content technology (such as Mac, Linux, etc.).
- **TECHNOLOGY VERSION**: The version of the content technology (such as Excel 2018, Windows 10, etc.).
- **CATEGORY**: The label of a linked content item.
- **SOURCE**: The source of a linked content item.
- **STATUS**: The status of the content. The status is not impacted by the Date filters. For all content items you could see Started or Completed.
- **COMPLETED DATE**: The date the user completed the content. This date is not impacted by the Date Range Presets filter. For scheduled content this could be the date of the class or the date the admin entered the completion and scores.
- **BADGE EARNED:** The date the user earned the content's Digital Badge. This date does not change and is not affected by the date range filters. You may encounter situations where the First Access date shows a date later than the Badge Earned date. This happens when a learner accesses content again after they earn a badge AND you run the report for a date range that does not include the original date the content was accessed. Percipio populates the First Accessed date using the first date the content was accessed within the date range you specified.
- **DURATION**: The amount of time the user has spent engaged with the content. If the item is a Skillsoft course, the total includes time spent watching videos, working on knowledge checks, and taking tests.Time is listed in (00h00m00s) format. On the CSV download, the value in this

column is shown in total seconds. The CSV download contains a second column called Duration (HMS) that shows duration in the 00h00m00s format. The duration only includes the time the learner spent watching the videos in the course. It does not include any time the learner spends on the test. If you see learners with a completed status and with 0 duration, the learner only took the test and did not watch any of the content.

- **ESTIMATED DURATION (HHMMSS)**: Total estimated amount of time it takes a learner to complete the specified content. Time is listed in (00h00m00s) format. On the CSV download, the value in this column is shown in total seconds. The CSV download contains a second column called Estimated Duration (HMS) that shows duration in the 00h00m00s format.
- **FIRST ACCESS DATE**: The first date within the filtered date range that the learner accessed the content. If the learner accessed the content on multiple occasions, this date may change based on the date range filters you specify.
- **LAST ACCESS DATE**: The last date within the filtered date range that the user accessed the content.
- **TOTAL ACCESSES**: The total number of times within the filtered date range that content was accessed. For example, if a learner launches the same course 3 times within the specified date range, the total accesses is 3.
- **FIRST SCORE**: The first score recorded for the content.
- **HIGH SCORE**: The high score recorded for the content.
- **LAST SCORE**: The last score recorded for the content.
- **COURSE ASSESSMENT ATTEMPTS**: The number of times the user attempted the assessment.

- **% OF VIDEO OR BOOK**: The percent of the video or book that the user has watched or read. This includes audiobooks.
- **EMAIL ADDRESS**: The value entered in the Email address user attribute; the user's email address.
- **User Attributes (varies)**: These fields are defined by (and are unique to) your organization. For more information, see User Attributes. If you are using an attribute type of Percipio User, the value in the field can be either first and last name, email address, login ID, or external user ID. The value that appears depends on what has been specified for the individual user.

Assignment Detail by User Report

The Assignment Detail by User report details what content has been assigned to learners. You can filter data by date range, audience, individual user, or assignment title. This report does not show canceled assignments.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

- **Date filters:** The Date filters apply to the **ASSIGNED DATE** column.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.

- **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

  Example

  > If you set the date to **START** on September 1 and **END** on October 1, only the assignments that were assigned within the September 1 - October 1 time period display.

- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.
- **User**: Individual with a Percipio user account. Enter a user's name to filter the report to include that user.
- **Assignment Title**: The title of an assignment.

Columns

The following columns are available in the Assignment Detail by User report:

- **USER ID**: The value entered in the User ID attribute. It is used to identify a user inside Percipio.
- **FIRST NAME**: The value entered in the First name user attribute. Usually the user's first name.
- **LAST NAME**: The value entered in the Last name user attribute. Usually the user's last name.
- **EMAIL ADDRESS**: The value entered in the Email address user attribute; the user's email address.
- **ASSIGNMENT TITLE**: The assignment's title.

- **DUE DATE**: The date the assignment is (or was) due.
- **ASSIGNMENT STATUS**: The status of the assignment (Started, Not Started, Complete, Archived).
- **ASSIGNMENT COMPLETED DATE**: The date the assignment was completed by the user.
- **ASSET TYPE**: The type of asset. Asset types may include courses, videos, books, audiobooks, audio summaries, book summaries, scheduled content, assessment, and linked content. When you see the asset type, linked content, it could be associated with any of following Skillsoft items: test preps, labs, bootcamps, live events, partner content, and any custom content items you added. When you see the asset type, scheduled content, it could be associated with any of following Skillsoft items: live courses, bootcamps or leadercamps. View the report online to see the list of asset types available for that report. When you see the asset type, assessment, it is associated with Skill Benchmarks.
- **LANGUAGE:** The language of the asset. Available languages and their codes are listed here.
- **CONTENT UUID**: A unique identifier for a specific content asset. Content UUIDs are mapped to activity codes in SumTotal Learn and are also used with third-party learner management systems.
- **CONTENT ID**: Unique identifier for Skillsoft courses and videos.
- **CONTENT TITLE**: The title of the asset.
- **STATUS**: The status of the content. The status is not impacted by the Date filters. For all content items you could see Started or Completed. For live courses, you may also see the following values in the Status column: Registered, Approval pending, Canceled, Denied, and Wait listed. When learners restart a course, you see either Restarted or Completed.

- **COMPLETED DATE**: The date the user completed the content. This date is not impacted by the Date Range Presets filter.
- **ASSIGNED DATE**: The date when the assignment was assigned to the user.
- **ASSIGNED BY USER ID**: The User ID of the user who assigned the content.
- **ASSIGNED BY FIRST NAME**: The first name of the user who assigned the content.
- **ASSIGNED BY LAST NAME**: The last name of the user who assigned the content.
- **BUSINESS OBJECTIVE**: The business objective that is linked to the assignment. For a complete listing of available business objectives, see Create a New Assignment.
- **USER STATUS**: The user's status within the system. Values include Active or Inactive.
- **OVERDUE:** A No value indicates that the user did complete the assignment. When an assignment status is incomplete, a Yes value indicates the user did not complete the assignment by the specified due date.
- **HIGH SCORE**: The high score recorded for the content.
- **DURATION**: The amount of time the user has spent engaged with the content. If the item is a Skillsoft course, the total includes time spent watching videos, working on knowledge checks, and taking tests.Time is listed in (00h00m00s) format.
- **User Attributes (varies)**: These fields are defined by (and are unique to) your organization. For more information, see User Attributes. If you are using an attribute type of Percipio User, the value in the field can be either first and last name, email address, login ID, or external user ID. The value that appears depends on what has been specified for the individual user.

Assignment Summary Report

The Assignment Summary report provides summary information on assignments that are in draft, in progress, or archived. Canceled assignments do not display in this report.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

- **Date filters:** The Date filters apply to the **ASSIGNMENT CREATED DATE** column.
    - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
    - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
    - **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

    Example

    > If you set the date to **START** on September 1 and **END** on October 1, only the assignments that were assigned within the September 1 - October 1 time period display.

- **Assignment Status**: Select an assignment status from the drop-down list.
- **Assignment Title**: The title of an assignment.

Columns

The following columns are available in the Assignment Summary report:

- **ASSIGNMENT TITLE**: The assignment's title.
- **ASSIGNED BY**: The assigner's name and User ID.
- **LEARNERS ASSIGNED**: The number of users who have the assignment.
- **% COMPLETED**: The percentage of assigned users who have completed the assignment.
- **STATUS**: The status of the content. The status is not impacted by the Date filters. For all content items you could see Started or Completed. For live courses, you may also see the following values in the Status column: Registered, Approval pending, Canceled, Denied, and Wait listed. When learners restart a course, you see either Restarted or Completed.
- **ASSIGNMENT CREATED DATE**: The date when the assignment was created.

Assignment Summary by User Report

The Assignment Summary by User report details the completion status for each user within each assignment. This report displays one line per user, per assignment. This report does not show canceled assignments.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

- **Date filters:** The Date filters apply to the **ASSIGNED DATE** column.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
  - **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

  Example

  > If you set the date to **START** on September 1 and **END** on October 1, only the assignments that were assigned within the September 1 - October 1 time period display.

- **Assignment Title**: The title of an assignment.
- **Assignment Status**: Select an assignment status from the drop-down list.
- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.
- **User**: Individual with a Percipio user account. Enter a user's name to filter the report to include that user.

Columns

The following columns are available in the Assignment Summary by User report:

- **ASSIGNMENT TITLE**: The assignment's title.
- **ASSIGNED DATE**: The date when the assignment was assigned to the user.
- **STATUS**: The status of the content. The status is not impacted by the Date filters. For all content items you could see Started or Completed. For live courses, you may also see the following values in the Status column: Registered, Approval pending, Canceled, Denied, and Wait listed. When learners restart a course, you see either Restarted or Completed.
- **USER ID**: The value entered in the User ID attribute. It is used to identify a user inside Percipio.
- **LAST NAME**: The value entered in the Last name user attribute. Usually the user's last name.
- **FIRST NAME**: The value entered in the First name user attribute. Usually the user's first name.
- **EMAIL ADDRESS**: The value entered in the Email address user attribute; the user's email address.
- **DUE DATE**: The date the assignment is (or was) due.
- **COMPLETION DATE**: The date the user completed the assignment. This date is not impacted by the Date Range Presets filter.
- **USER STATUS**: The status of the user in Percipio. Valid values are active or inactive.
- **% COMPLETED:** This number indicates how much of the assignment a user has completed as of the time the report runs. It is calculated by the

number of items completed divided by the total number of items assigned.

- **OVERDUE:** A No value indicates that the user did complete the assignment. When an assignment status is incomplete, a Yes value indicates the user did not complete the assignment by the specified due date.
- **TOTAL ASSETS:** The number of assets contained in the assignment.
- **ASSETS NOT STARTED:** The number of assets within an assignment that a user has not started.
- **ASSETS STARTED:** The number of assets within an assignment that a user started.
- **ASSETS COMPLETED:** The number of assets within an assignment that a user completed.
- **User Attributes (varies)**: These fields are defined by (and are unique to) your organization. For more information, see User Attributes. If you are using an attribute type of Percipio User, the value in the field can be either first and last name, email address, login ID, or external user ID. The value that appears depends on what has been specified for the individual user.

License Consumption Report

The License Consumption report displays a listing of users, by collection, who have consumed a license. It also notes the name of the audience that the user is a member of and that is associated to the collection's license pool (which entitles the user to that collection).

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

- **Date filters:** The Date filters apply to the **CONSUMED** column.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
  - **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

  Example

  > If you set the date to **START** on September 1 and **END** on October 1, only the licenses that were consumed within the September 1 - October 1 time period display.

- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.
- **User**: Individual with a Percipio user account. Enter a user's name to filter the report to include that user.
- **Collection**: Filters by specific content collection.

Columns

The following columns are available in the License Consumption report:

- **COLLECTION**: The name of the content collection that contains the content item.
- **USER ID**: The value entered in the User ID attribute. It is used to identify a user inside Percipio.
- **FIRST NAME**: The value entered in the First name user attribute. Usually the user's first name.
- **LAST NAME**: The value entered in the Last name user attribute. Usually the user's last name.
- **EMAIL ADDRESS**: The value entered in the Email address user attribute; the user's email address.
- **ENTITLED BY AUDIENCE:** The audience in which the user is a member of that grants him entitlement to the collection's licenses.
- **CONSUMED:** The date the collection's license was consumed by the specific user.
- **START DATE:** The date the license pool was activated. With the start and end dates, you can easily distinguish when the license pool was active within the date range filter.
- **END DATE:** The date the license pool expired.
- **User Attributes (varies)**: These fields are defined by (and are unique to) your organization. For more information, see User Attributes. If you are using an attribute type of Percipio User, the value in the field can be either first and last name, email address, login ID, or external user ID. The value that appears depends on what has been specified for the individual user.

Content Access Report

The Content Access report details what content users in your organization are accessing and how many Digital Badges they earned.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose

Start CSV Download, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

- **Date filters:** The Date filters apply to the **TOTAL UNIQUE USERS, TOTAL ACCESSES, TOTAL DURATION, and TOTAL COMPLETIONS** columns.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
  - **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

  Example

  > If you set the date to **START** on September 1 and **END** on October 1, only content accessed within the September 1 - October 1 time period displays .

- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.
- **Asset Type**: Select specific asset types from the drop-down list.
- **Collection**: Filters by specific content collection.

- **Language:** Select only one option from the drop-down list. **All Languages** is set by default.

Columns

The following columns are available in the Content Access report:

- **COLLECTION**: The name of the content collection that contains the content item.
- **CHANNEL:** The name of the channel.
- **CONTENT TITLE**: The title of the asset.
- **CONTENT UUID**: A unique identifier for a specific content asset. Content UUIDs are mapped to activity codes in SumTotal Learn and are also used with third-party learner management systems.
- **CONTENT ID**: Unique identifier for Skillsoft courses and videos.
- **ASSET TYPE**: The type of asset. Asset types may include courses, videos, books, audiobooks, audio summaries, book summaries, scheduled content, assessment, and linked content. When you see the asset type, linked content, it could be associated with any of following Skillsoft items: test preps, labs, bootcamps, live events, partner content, and any custom content items you added. When you see the asset type, scheduled content, it could be associated with any of following Skillsoft items: live courses, bootcamps or leadercamps. View the report online to see the list of asset types available for that report. When you see the asset type, assessment, it is associated with Skill Benchmarks.
- **LANGUAGE:** The language of the asset. Available languages and their codes are listed here.
- **TOTAL UNIQUE USERS**: The total number of individual users that accessed an asset.

- **TOTAL ACCESSES**: The total number of times within the filtered date range that content was accessed. For example, if a learner launches the same course 3 times within the specified date range, the total accesses is 3.
- **TOTAL DURATION**: The total amount of time all users spent in an asset. Time is listed in (00h00m00s) format.
- **AVERAGE DURATION**: The average amount of time a user spent in an asset.
- **COMPLETIONS**: The total number of completions for that user. This number does not include individual Skillsoft course videos.
- **TOTAL BADGES EARNED:** The total number of users who have earned a Digital Badge for the asset, within the specified date range. Badges cannot be earned for scheduled content.

User Listing Report

The User Listing report displays a full listing of all users within Percipio.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

The filters you set apply to all data presented in the report.

- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.
- **User**: Individual with a Percipio user account. Enter a user's name to filter the report to include that user.

Columns

The following columns are available in the User Listing report:

- **USER ID**: The value entered in the User ID attribute. It is used to identify a user inside Percipio.
- **FIRST NAME**: The value entered in the First name user attribute. Usually the user's first name.
- **LAST NAME**: The value entered in the Last name user attribute. Usually the user's last name.
- **EMAIL ADDRESS**: The value entered in the Email address user attribute; the user's email address.
- **USER STATUS**: The status of the user in Percipio. Valid values are active or inactive.
- **ROLE**: The user's role (admin, learner).
- **CREATED DATE**: The date the user was created.
- **LAST LOGIN DATE**: The date when the user last signed into Percipio within the specified date range.
- **LAST CONTENT ACCESS**: The date when the user last accessed content within the specified date range.
- **AUDIENCE**: The audience(s) in which users are a member.
- **USE POLICY AGREEMENT DATE:** The date when the user last accepted the Corporate Use Policy.
- **User Attributes (varies)**: These fields are defined by (and are unique to) your organization. For more information, see User Attributes. If you are using an attribute type of Percipio User, the value in the field can be either first and last name, email address, login ID, or external user ID. The value that appears depends on what has been specified for the individual user.

User Summary Report

The User Summary report provides an overall summary of the users and their Percipio usage within your organization and Digital Badges earned.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

- **Date filters:** The Date filters apply to the all columns.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
  - **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.
- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.
- **User**: Individual with a Percipio user account. Enter a user's name to filter the report to include that user.

Columns

The following columns are available in the User Listing report:

- **USER ID**: The value entered in the User ID attribute. It is used to identify a user inside Percipio.
- **FIRST NAME**: The value entered in the First name user attribute. Usually the user's first name.
- **LAST NAME**: The value entered in the Last name user attribute. Usually the user's last name.
- **AUDIENCE:** The audience(s) in which users are a member.
- **UNIQUE TITLES VIEWED**: The number of distinct/unique titles viewed.
- **TOTAL VIEWS**: The total number of content accesses.
- **TOTAL LEARNING HOURS**: The duration (in hours) of time the user spent within learning assets.
- **COMPLETIONS**: The total number of completions for that user. This number does not include individual Skillsoft course videos.
- **TOTAL PAGE VIEWS**: The total number of platform/site pages viewed by users.
- **TOTAL SESSIONS**: The total number of user login sessions in Percipio on the web, in the mobile app, via ELSA, or through content integration.
- **PAGES PER SESSION:** The average number of pages in Percipio that the user accessed in each session.
- **BADGES EARNED:** The total number of Digital Badges for courses, tracks, and journeys the user earned during the specified time period.
- **USER STATUS**: The status of the user in Percipio. Valid values are active or inactive.

Audience Summary Report

The Audience Summary report displays all of your Percipio audiences, and the number of active and inactive users in each.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

The filters you set apply to all data presented in the report.

- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.

Columns

The following columns are available in the Audience Summary report:

- **AUDIENCE**: The audience(s) in which users are a member.
- **TOTAL USERS**: The total number of users within Percipio.
- **ACTIVE USERS**: The total number of active users in the audience.
- **INACTIVE USERS**: The total number of inactive users in the audience.

All Content by Collection Report

The All Content by Collection report lists available content by collection. It includes descriptions for courses, books, book summaries, audiobooks, and linked content.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

The filters you set apply to all data presented in the report.

- **Asset Type**: Select specific asset types from the drop-down list.
- **Collection**: Filters by specific content collection.
- **Language:** Select only one option from the drop-down list. **All Languages** is set by default.

Columns

The following columns are available in the All Content by Collection report:

- **COLLECTION**: The name of the content collection that contains the content item.
- **AREA:** The library area where you can find the content item's associated subject and channel.
- **SUBJECT:** The library subject where you can find the content item's associated channel.
- **CHANNEL:** The name of the channel.
- **CONTENT UUID**: A unique identifier for a specific content asset. Content UUIDs are mapped to activity codes in SumTotal Learn and are also used with third-party learner management systems.
- **CONTENT ID**: Unique identifier for Skillsoft courses and videos.
- **CONTENT TITLE**: The title of the asset.
- **ASSET TYPE**: The type of asset. Asset types may include courses, videos, books, audiobooks, audio summaries, book summaries, scheduled content, assessment, and linked content. When you see the asset type, linked content, it could be associated with any of following Skillsoft items: test preps, labs, bootcamps, live events, partner content, and any custom content items you added. When you see the asset type, scheduled content, it could be associated with any of following Skillsoft items: live courses, bootcamps or leadercamps. View the report online to see

the list of asset types available for that report. When you see the asset type, assessment, it is associated with Skill Benchmarks.

- **LANGUAGE:** The language of the asset. Available languages and their codes are listed here.
- **TECHNOLOGY TITLE**: The title of the content technology (such as Mac, Linux, etc.).
- **TECHNOLOGY VERSION**: The version of the content technology (such as Excel 2018, Windows 10, etc.).
- **EXPERTISE LEVEL**: The level of expertise of content, as noted by the curator (beginner, intermediate, advanced, everyone).
- **ESTIMATED DURATION (HHMMSS)**: Total estimated amount of time it takes a learner to complete the specified content. Time is listed in (00h00m00s) format.
- **CATEGORY**: The label of a linked content item.
- **SOURCE**: The source of a linked content item.
- **BADGE ELIGIBLE:** Displays a **Y** if the learner can earn a Digital Badge for the content or an **N** if he cannot.
- **STATUS**: The status of an asset (published, retired, pending retirement).
- **LAST PUBLISHED DATE**: The date the asset was last updated in Percipio.
- **DESCRIPTION**: A detailed description of the asset.

Executive Report

The Executive report displays a full listing of active and inactive users. It also provides data for a specified time period about the unique user session and number of login sessions, as well as a summary of each user session. You can view the users accessing content, total content accesses, Digital Badges earned, and unique titles accessed.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

- **Date filters:** The Date filters apply to all data presented in the Executive report.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
  - **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.
- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.

Columns

The following columns are available in the Executive report:

- **TOTAL USERS**: The total number of users within Percipio.
- **ACTIVE**: The number of users with an active status in Percipio.
- **INACTIVE**: The number of users with an inactive status in Percipio.
- **USERS LOGGED IN**: The number of users within the Total Users number that signed into Percipio during the specified time frame.

- **NUMBER OF LOGIN SESSIONS**: The total number of times users engaged with the platform during the specified time frame.
- **USERS ACCESSING CONTENT**: The total number of unique users who accessed content from within the platform during the specified time frame.
- **TOTAL TIME IN CONTENT**: The total amount of time users actively used the content during the specified time frame. Time is listed in (00h00m00s) format.
- **TOTAL CONTENT ACCESSES**: The total number of times within the filtered date range that content was accessed.
- **UNIQUE TITLES ACCESSED**: The total number of individual assets accessed during the specified time frame. This does not include videos, channels, or journeys. When a course is **restarted**[1] within the specified time frame, that is only counted once.
- **TOTAL COMPLETIONS:** The total number of completions of all asset types, but does not include videos inside the course.
- **TOTAL BADGES EARNED:** The total number of Digital Badges for courses, tracks, and journeys your users earned during the specified time period.
- **WEB USERS:** The total number of unique users who accessed Percipio via the web during the specified time frame.

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[1]A course is considered restarted if a learner previously completed it and then selected the Restart button. When a course is restarted, the learner sees a new row in their My Activity page and admins see a new row in reports. If a learner just relaunches a previously completed course, no new row shows in My Activity or reports. When a course is restarted and completed, the learner earns a new certificate of completion with the new completion date. Learners do not earn a new badge for a restarted course.

- **MOBILE APP USERS:** The total number of unique users who accessed Percipio via the mobile app during the specified time frame.
- **MS TEAMS USERS:** The total number of unique users who accessed Percipio via the Percipio app for Microsoft Teams during the specified time frame.
- **APPLE TV USERS:** The total number of unique users who accessed Percipio via the Percipio app for Apple TV during the specified time frame.

Channel Summary Report

The Channel Summary report provides a summary of user activity within your Percipio channels.

> **Note:** Custom channels do not display in this report until content within them is accessed by a learner.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

- **Date filters:** The Date filters apply to all data presented in the Channel Summary report.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.

- **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

- **Channel Type:** Select whether you want to see all channels, only Skillsoft channels, or only custom channels in your report data.
- **Language:** Select only one option from the drop-down list. **All Languages** is set by default.
- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.
- **Channel:** Type a channel name in the field to filter the report to only that channel. This filter is single-select only.

Columns

The following columns are available in the Channel Summary report:

- **CHANNEL:** The name of the channel.
- **CHANNEL TYPE:** The type of channel (Skillsoft or Custom). Skillsoft channels are stock channels, and custom channels are those built specifically for or by your organization.
- **ACCESSES OF CONTENT:** The total number of content accesses within the channel. A content item may exist in more than one channel. If a learner accesses a single content item that exists in three different channels, you see a count for that learner in the **Accesses of Content** column for each channel.
- **LAST PUBLISHED DATE:** The date the channel was last published within Percipio.
- **SUBJECT:** The library subject that contains the channel.

- **AREA:** The library area that contains the subject to which the channel is associated.
- **USERS IN CONTENT:** The total number of users who accessed content within the channel.
- **TOTAL DURATION**: The total amount of time all users spent in a channel. Time is listed in (00h00m00s) format.
- **ESTIMATED CHANNEL DURATION:**The estimated amount of time in hours, minutes, and seconds (00h00m00s) to complete all content within the channel.
- **CHANNEL UUID:** A unique identifier for a channel. Channel UUIDs are mapped to activity codes in SumTotal Learn and are also used with third-party learner management systems.

Channel Detail by User Report

The Channel Detail by User report provides a detailed look of user activity of assets within your Percipio channels.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

- **Date filters:** The Date filters apply to all data presented in the Channel User Details report.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.

- **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
- **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

- **Channel Type:** Select whether you want to see all channels, only Skillsoft channels, or only custom channels in your report data.
- **Language:** Select only one option from the drop-down list. **All Languages** is set by default.
- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.
- **User**: Individual with a Percipio user account. Enter a user's name to filter the report to include that user.
- **Channel:** Type a channel name in the field to filter the report to only that channel. This filter is single-select only.

Columns

The following columns are available in the Channel Detail by User report:

- **AREA:** The library area that contains the subject to which the channel is associated.
- **SUBJECT:** The library subject that contains the channel.
- **CHANNEL:** The name of the channel.
- **CHANNEL TYPE:** The type of channel (Skillsoft or Custom). Skillsoft channels are stock channels, and custom channels are those built specifically for or by your organization.

- **CHANNEL UUID:** A unique identifier for a channel. Channel UUIDs are mapped to activity codes in SumTotal Learn and are also used with third-party learner management systems.
- **USER ID**: The value entered in the User ID attribute. It is used to identify a user inside Percipio.
- **FIRST NAME**: The value entered in the First name user attribute. Usually the user's first name.
- **LAST NAME**: The value entered in the Last name user attribute. Usually the user's last name.
- **CONTENT ID**: Unique identifier for Skillsoft courses and videos.
- **CONTENT UUID**: A unique identifier for a specific content asset. Content UUIDs are mapped to activity codes in SumTotal Learn and are also used with third-party learner management systems.
- **CONTENT TITLE**: The title of the asset.
- **ASSET TYPE**: The type of asset. Asset types may include courses, videos, books, audiobooks, audio summaries, book summaries, scheduled content, assessment, and linked content. When you see the asset type, linked content, it could be associated with any of following Skillsoft items: test preps, labs, bootcamps, live events, partner content, and any custom content items you added. When you see the asset type, scheduled content, it could be associated with any of following Skillsoft items: live courses, bootcamps or leadercamps. View the report online to see the list of asset types available for that report. When you see the asset type, assessment, it is associated with Skill Benchmarks.
- **LANGUAGE:** The language of the asset. Available languages and their codes are listed here.
- **TECHNOLOGY TITLE**: The title of the content technology (such as Mac, Linux, etc.).

- **TECHNOLOGY VERSION**: The version of the content technology (such as Excel 2018, Windows 10, etc.).
- **CATEGORY**: The label of a linked content item.
- **SOURCE**: The source of a linked content item.
- **TOTAL ACCESSES**: The total number of times within the filtered date range that content was accessed. For example, if a learner launches the same course 3 times within the specified date range, the total accesses is 3.
- **LAST CONTENT ACCESS**: The date when the user last accessed content within the specified date range.
- **TOTAL DURATION**: The total amount of time all users spent in a channel. Time is listed in (00h00m00s) format.
- **ESTIMATED DURATION (HHMMSS)**: Total estimated amount of time it takes a learner to complete the specified content. Time is listed in (00h00m00s) format.
- **STATUS**: The status of the content. The status is not impacted by the Date filters. For all content items you could see Started or Completed. For live courses, you may also see the following values in the Status column: Registered, Approval pending, Canceled, Denied, and Wait listed. When learners restart a course, you see either Restarted or Completed.
- **COMPLETION DATE**: The date the user completed the content. This date is not impacted by the Date Range Presets filter. The time stamp of t00:00:00Z is expected.
- **EMAIL ADDRESS**: The value entered in the Email address user attribute; the user's email address.
- **User Attributes (varies)**: These fields are defined by (and are unique to) your organization. For more information, see User Attributes. If you are using an attribute type of Percipio User, the value in the field can be either

first and last name, email address, login ID, or external user ID. The value that appears depends on what has been specified for the individual user.

Channel Summary by User Report

The Channel Summary by User report provides a summary of user activity of assets within your Percipio channels.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

- **Date filters:** The Date filters apply to all data presented in the Channel User Summary report.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
  - **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.
- **Channel Type:** Select whether you want to see all channels, only Skillsoft channels, or only custom channels in your report data.
- **Language:** Select only one option from the drop-down list. **All Languages** is set by default.

- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.
- **Channel:** Type a channel name in the field to filter the report to only that channel. This filter is single-select only.

Columns

The following columns are available in the Channel Summary by User report:

- **AREA:** The library area that contains the subject to which the channel is associated.
- **SUBJECT:** The library subject that contains the channel.
- **CHANNEL:** The name of the channel.
- **CHANNEL TYPE:** The type of channel (Skillsoft or Custom). Skillsoft channels are stock channels, and custom channels are those built specifically for or by your organization.
- **CHANNEL UUID:** A unique identifier for a channel. Channel UUIDs are mapped to activity codes in SumTotal Learn and are also used with third-party learner management systems.
- **USER ID**: The value entered in the User ID attribute. It is used to identify a user inside Percipio.
- **FIRST NAME**: The value entered in the First name user attribute. Usually the user's first name.
- **LAST NAME**: The value entered in the Last name user attribute. Usually the user's last name.
- **TOTAL CONTENT ACCESSES**: The total number of times within the filtered date range that content was accessed.
- **TOTAL DURATION**: The total amount of time all users spent in a channel. Time is listed in (00h00m00s) format.

- **ESTIMATED DURATION (HHMMSS)**: Total estimated amount of time it takes a learner to complete the specified content. Time is listed in (00h00m00s) format.
- **UNIQUE ASSETS ACCESSED**: The number of distinct/unique assets accessed within the channel.
- **COMPLETIONS**: The total number of completions for that user. This number does not include individual Skillsoft course videos.
- **LAST ACCESS DATE**: The last date within the filtered date range that the user accessed the content.
- **EMAIL ADDRESS**: The value entered in the Email address user attribute; the user's email address.
- **User Attributes (varies)**: These fields are defined by (and are unique to) your organization. For more information, see User Attributes. If you are using an attribute type of Percipio User, the value in the field can be either first and last name, email address, login ID, or external user ID. The value that appears depends on what has been specified for the individual user.

Journey Summary Report

The Journey Summary report provides a complete summary of the number of unique learners, completions, accesses, and estimated hours of content for Aspire Journeys and custom journeys. You can filter data by date range, and audience.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

When journey progress tracking starts

In order to start tracking progress within a journey, learners must launch at least one item from within the journey. Scenarios for when journeys start tracking progress:

- After learners launch an item from within the journey, tracking of journey completion starts, and at that point learners can launch any journey item from search results or a channel and the progress counts toward track and journey completion.
- If learners launch an item that is contained in a journey from search results or from a channel, without first launching any item from within the journey, Percipio does not start tracking journey progress, only the progress of the individual item.
- If learners previously completed any item contained in the journey, those completed items count towards the track and journey completion provided learners first launched an item from within the journey.
- After learners launch content from within a journey, you see progress in all the journey reports.

Filters

- **Date filters:**
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
  - **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.If the user within an audience has accessed more than one journey, all journeys the user accessed show in the report.
- **Journey Source**: Select whether you want to see Skillsoft, custom or both types of journeys listed in your report.

Columns

The following columns are available in the Journey Summary report:

- **JOURNEY TITLE:** The title of the journey.
- **NUMBER OF UNIQUE LEARNERS**: The total number of individual learners that accessed the Journey within the specified date range.
- **NUMBER OF JOURNEY COMPLETIONS:** The number of times the Journey was completed within the specified date range.
- **TOTAL CONTENT ACCESSES**: The total number of times within the filtered date range that content was accessed.
- **TOTAL ESTIMATED DURATION:** The total number of estimated hours it will take a learner to complete all of the content in all of the tracks within the Journey.
- **JOURNEY SOURCE**: Identifies whether the journey is Skillsoft or custom.

Journey Summary by User Report

The Journey Summary by User report provides a summary of a learner's engagement and progress within a specific Aspire Journey or custom journey.

You can filter data by date range, audience, or individual user.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose

Start CSV Download, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

When journey progress tracking starts

In order to start tracking progress within a journey, learners must launch at least one item from within the journey. Scenarios for when journeys start tracking progress:

- After learners launch an item from within the journey, tracking of journey completion starts, and at that point learners can launch any journey item from search results or a channel and the progress counts toward track and journey completion.
- If learners launch an item that is contained in a journey from search results or from a channel, without first launching any item from within the journey, Percipio does not start tracking journey progress, only the progress of the individual item.
- If learners previously completed any item contained in the journey, those completed items count towards the track and journey completion provided learners first launched an item from within the journey.
- After learners launch content from within a journey, you see progress in all the journey reports.

Filters

- **Date filters:** The Date filters apply to the **COMPLETED DATE** column.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.

- **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.If the user within an audience has accessed more than one journey, all journeys the user accessed show in the report.
- **User**: Individual with a Percipio user account. Enter a user's name to filter the report to include that user.
- **Journey Source**: Select whether you want to see Skillsoft, custom or both types of journeys listed in your report.

Columns

The following columns are available in the Journey Summary by User report:

- **JOURNEY TITLE:** The title of the journey.
- **USER ID**: The value entered in the User ID attribute. It is used to identify a user inside Percipio.
- **USER NAME:** Also called a Login Name, learners use this to sign into Percipio.
- **JOURNEY STATUS:** A Journey can be in a **Started** or **Completed** status.
- **COMPLETED DATE**: The date the user completed the all tracks in the Journey. This date is not impacted by the Date Range Presets filter, and the time stamp of t00:00:00Z is expected.
- **% COMPLETE:** The percentage of completed tracks within the entire Journey. For example, if the learner completes one track out of four, his percentage is 25%.

- **TOTAL DURATION**: The amount of time the user has spent engaged with the content. If the item is a Skillsoft course, the total includes time spent watching videos, working on knowledge checks, and taking test-s.Time is listed in (00h00m00s) format.
- **ESTIMATED DURATION (HHMMSS)**: Total estimated amount of time it takes a learner to complete the specified content. Time is listed in (00h00m00s) format.
- **JOURNEY START DATE:** The date the learner began the journey. This date is not impacted by the Date Range Presets filter, and the time stamp of t00:00:00Z is expected.
- **EMAIL ADDRESS**: The value entered in the Email address user attrib-ute; the user's email address.
- **JOURNEY SOURCE**: Identifies whether the journey is Skillsoft or cus-tom.
- **User Attributes (varies)**: These fields are defined by (and are unique to) your organization. For more information, see User Attributes. If you are using an attribute type of Percipio User, the value in the field can be either first and last name, email address, login ID, or external user ID. The value that appears depends on what has been specified for the individual user.

Journey Detail by User Report

The Journey Detail by User report provides metrics on a learner's engagement and progress within a specific Aspire Journey or custom journey. You can filter data by date range, audience, or individual user.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

When journey progress tracking starts

In order to start tracking progress within a journey, learners must launch at least one item from within the journey. Scenarios for when journeys start tracking progress:

- After learners launch an item from within the journey, tracking of journey completion starts, and at that point learners can launch any journey item from search results or a channel and the progress counts toward track and journey completion.
- If learners launch an item that is contained in a journey from search results or from a channel, without first launching any item from within the journey, Percipio does not start tracking journey progress, only the progress of the individual item.
- If learners previously completed any item contained in the journey, those completed items count towards the track and journey completion provided learners first launched an item from within the journey.
- After learners launch content from within a journey, you see progress in all the journey reports.

Filters

- **Date filters:** The Date filters apply to the **COMPLETED DATE** column.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
  - **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.If the user within an audience has accessed more than one journey, all journeys the user accessed show in the report.
- **User**: Individual with a Percipio user account. Enter a user's name to filter the report to include that user.
- **Journey Source**: Select whether you want to see Skillsoft, custom or both types of journeys listed in your report.

Columns

The following columns are available in the Journey Detail by User report:

- **JOURNEY TITLE:** The title of the journey.
- **TRACK TITLE:** The title of a track within the journey.
- **USER ID**: The value entered in the User ID attribute. It is used to identify a user inside Percipio.
- **FIRST NAME**: The value entered in the First name user attribute. Usually the user's first name.
- **LAST NAME**: The value entered in the Last name user attribute. Usually the user's last name.
- **CONTENT TITLE**: The title of the asset.
- **CONTENT ID**: Unique identifier for Skillsoft courses and videos.
- **CONTENT UUID**: A unique identifier for a specific content asset. Content UUIDs are mapped to activity codes in SumTotal Learn and are also used with third-party learner management systems.
- **ASSET STATUS**: The status of the content. The status is not impacted by the Date filters. For all content items you could see Started or Completed. For live courses, you may also see the following values in the

Status column: Registered, Approval pending, Canceled, Denied, and Wait listed. When learners restart a course, you see either Restarted or Completed.

- **COMPLETED DATE**: The date the user completed the content. This date is not impacted by the Date Range Presets filter. The time stamp of t00:00:00Z is expected.
- **TOTAL DURATION**: The amount of time the user has spent engaged with the content. If the item is a Skillsoft course, the total includes time spent watching videos, working on knowledge checks, and taking tests.Time is listed in (00h00m00s) format.
- **ESTIMATED DURATION (HHMMSS)**: Total estimated amount of time it takes a learner to complete the specified content. Time is listed in (00h00m00s) format.
- **EMAIL ADDRESS**: The value entered in the Email address user attribute; the user's email address.
- **JOURNEY SOURCE**: Identifies whether the journey is Skillsoft or custom.
- **User Attributes (varies)**: These fields are defined by (and are unique to) your organization. For more information, see User Attributes. If you are using an attribute type of Percipio User, the value in the field can be either first and last name, email address, login ID, or external user ID. The value that appears depends on what has been specified for the individual user.

Credentials Report

The Credentials report displays a list of users within your organization who earned credit(s) for completing their NASBA CPE course(s).

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters:

- **Date filters:** The Date filters apply to the **START DATE** and **CPE COMPLETION DATE** columns.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.Date (based on completion date)
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
  - **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

    Example

    If you set the date to **START** on November 1 and **END** on December 1, only the content with credit hours that was accessed between the November 1-December 1 time period displays.
- **User**: Individual with a Percipio user account. Enter a user's name to filter the report to include that user.
- **AUDIENCE**: Predefined group of users. Enter the name of an audience and then select it from the list. You can display the data for multiple audiences at the same time by entering more than one audience name.

Columns

The following columns are available in the Credentials report:

- **USER ID**: The value entered in the User ID attribute. It is used to identify a user inside Percipio.
- **FIRST NAME**: The value entered in the First name user attribute. Usually the user's first name.
- **LAST NAME**: The value entered in the Last name user attribute. Usually the user's last name.
- **CREDIT TYPE:** The type of credit necessary to receive the credential.
- **CREDIT HOURS**: The number of credit hours the user completed for the credential.
- **COURSE TITLE:** The title of a course that is part of a credential certification.
- **COURSE ID:** A unique identifier for a course that is part of a credential certification.
- **START DATE**: The start date of the credential course.
- **CPE COMPLETION DATE:** The date that all of the Continuing Professional Education requirements for the credential were met by the user.

Content Promotion Summary Report

The Content Promotion Summary report provides metrics for your organization's content promotions. Filter your data by date range to view details such as unique impressions, targeted audiences, unique clicks, and a promotion's click-through rate.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

- **Date filters:** The Date filters apply to the **START DATE**, **END DATE**, **TOTAL IMPRESSIONS**, **TOTAL UNIQUE IMPRESSIONS**, **TOTAL CLICKS**, **TOTAL UNIQUE CLICKS**, and **CLICK-THROUGH RATE** columns.
  - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
  - **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
  - **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

  Example

  > If you set the date to **START** on September 1 and **END** on October 1, only the promotions that were active within the September 1 - October 1 time period display.

Columns

The following columns are available in the Content Promotion Summary report:

- **PROMOTION TITLE:** The promotion title.
- **PROMOTION TYPE:** The type of promotion — content **banner** or content **strip**. Image types are not currently supported in the report.
- **CONTENT TITLE**: The title of the asset.
- **CREATED BY:** The User ID of the person who created the promotion.
- **START DATE**: The date the promotion began (or is scheduled to begin).
- **END DATE**: The date the promotion ended (or is scheduled to end).
- **TARGET AUDIENCES:** A list of the promotion's targeted audiences. Only learners in these audiences see the promotion.
- **TOTAL IMPRESSIONS:** The number of times within the specified date range the promotion rendered on all learner home page screens. Impressions are not action-based. For example, if a learner signed into Percipio four times within the specified date range and viewed her home page each time (an impression), all four impressions are included in this calculation.
- **TOTAL UNIQUE IMPRESSIONS:** The number of unique learners who accessed their home page within the specified date range while the promotion was active, regardless of how many times the promotion was actually viewed. For example, if a learner signed into Percipio four times within the specified date range and viewed her home page each time (an impression), only one impression for this learner is included in this calculation.
- **TOTAL CLICKS:** The total number of times within the specified date range learners clicked the promotion to access the content. For example, if a learner clicked the promotion four times within the specified date range, all four clicks are included in this calculation.
- **TOTAL UNIQUE CLICKS:** The number of unique learners who clicked the promotion within the specified date range, regardless of how many

times they clicked it. For example, if a learner clicked the promotion four times within the specified date range, only one click for this learner is included in this calculation.

- **CLICK-THROUGH RATE:** The percentage of impressions that led to learners clicking the content. This number is a strong indicator of how well your promotion performed with your learners.
- **EMAILS SENT:**The total number of users who received emails.
- **EMAILS OPENED:** The total number of users who opened the emails that were sent.
- **EMAILS CLICKED:** The total number of users who clicked on at least one link in the email.

Content Promotion Detail by User Report

The Content Promotion Detail by User report provides metrics for the number of impressions and clicks for each content promotion.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

Filters

- **Date filters:** The Date filters apply to the **START DATE**, **END DATE**, **TOTAL IMPRESSIONS**, **TOTAL CLICK-THROUGHS**, and **LAST CLICK-THROUGH DATE** columns.
    - **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.

- **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
- **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

  Example

  > If you set the date to **START** on September 1 and **END** on October 1, only the promotions that were active within the September 1 - October 1 time period display.

Columns

The following columns are available in the Content Promotion Detail by User report:

- **USER ID**: The value entered in the User ID attribute. It is used to identify a user inside Percipio.
- **FIRST NAME**: The value entered in the First name user attribute. Usually the user's first name.
- **LAST NAME**: The value entered in the Last name user attribute. Usually the user's last name.
- **EMAIL ADDRESS**: The value entered in the Email address user attribute; the user's email address.
- **PROMOTION TITLE:** The promotion title.
- **PROMOTION TYPE:** The type of promotion — content **banner** or content **strip**. Image types are not currently supported in the report.

- **CREATED BY:** The User ID of the person who created the promotion.
- **START DATE**: The date the promotion began (or is scheduled to begin).
- **END DATE**: The date the promotion ended (or is scheduled to end).
- **TOTAL IMPRESSIONS:** The number of times within the specified date range the promotion rendered on all learner home page screens. Impressions are not action-based. For example, if a learner signed into Percipio four times within the specified date range and viewed her home page each time (an impression), all four impressions are included in this calculation.
- **TOTAL CLICKS:** The total number of times within the specified date range learners clicked the promotion to access the content. For example, if a learner clicked the promotion four times within the specified date range, all four clicks are included in this calculation.
- **LAST CLICK-THROUGH DATE:** The most recent date within the specified date range when a learner clicked the promotion to access the content.

Skillsoft Content Status Report

The Skillsoft Content Status Report contains up to three tabs and a link to retiring books:

- **Retiring Soon**: lists courses, channels, and linked content about to retire.
- **Recently Added**: lists courses, channels, and linked content added to your collections.
- **Retired/Removed**: lists courses, channels, and linked content already retired. *You only see this tab if you are integrating Percipio with another LMS and your Skillsoft Account Team turned on the LMS Integration setting*. Speak to your Skillsoft representative if this is something that interests you.

- **Looking for retiring books**: this link takes you to a web page containing a spreadsheet listing books that have been retired and are scheduled to be retired.

Use this report to manage the assets in assignments, custom channels, custom journeys, and promoted content.

As a reminder, Percipio sends a monthly Retiring and recently added content email to Percipio user roles that can access this report. This email alerts you that assets in your collection are either being retired or added, and provides you a link to view the report.

To access the same report direct from Percipio at any time, from the **Content** menu, select **Content Status**.

For more information about how Percipio handles retired content within assignments, see Retired Content.

> **Note:** The Content Status report does not include books or audiobooks, or any Percipio Compliance assets.

Specify filters, then select **Update Table** to view the report data in the current window, or select **Start CSV Download** to generate a CSV file. If you chose **Start CSV Download**, a message displays with a link to the Reports download tab. Select the link to view the CSV download progress and/or open the CSV file.

> **Note:** The Recently Added portion of the report is not available for CSV download at this time. You can only download the Retiring Soon and Retired/Removed portion of the report.

Report Filters

Date filters: The Date filters apply to the content shown in the reports.

- **Date Range Presets:** A drop-down list of date ranges that filters the data to the selected range. Select **Custom** to enter specific dates.
- **Start**: Instead of using a Date Range preset, use this to specify a start date. When you enter a **Start** date, the Date Range Presets filter changes to **Custom**.
- **End**: Instead of using a Date Range preset, use this to specify an end date. When you enter an **End** date, the Date Range Presets filter changes to **Custom**.

Content Rule Set: If you integrate Percipio with an LMS, you may see this option. If you select the value: **Show items within the rule set**, you see just the content impacted by the content rules you defined. On the Recently Added tab, you can then download an AICC package that contains just the content that was added within the date range specified.

Example

> If you set the date to **Start** on September 1 and **End** on October 1, only the content that is retiring or has been added during the September 1 - October 1 time period is included in the list.

Columns for Retiring Soon tab

The following columns are available in the Skillsoft Content Status report for the Retiring Soon tab:

- **TITLE**: The title of the asset.
- **TYPE**: The type of asset. See Working with Content for a complete list of available asset types.

- **RETIRE DATE**: The date the asset is set to retire. within the specified date range.
- **DETAILS:** Click the **View Details** link to see the reason for retirement, any replacement assets available, and the retirement date.
- **TOTAL UNIQUE USER ACCESSES**: The all-time, cumulative, total number of individual users that accessed an asset, not limited to a date range.
- **CONTAINED IN**: The three CONTAINED IN columns show how many assignments, custom channels, and promotions include the retiring content.

Columns for Recently Added tab

The following columns are available in the Skillsoft Content Status report for the Recently Added tab which shows courses added to your collections in the date range specified:

- **TITLE**: The title of the asset.
- **TYPE**: The type of asset. See Working with Content for a complete list of available asset types.
- **CONTAINED**: The three CONTAINED columns show the channel or journey, area, and subject where the new asset resides.
- **INFO:** Clicking on the icon provides links so you can quickly make the content more prominent for your learners by adding it as a promotion, to a channel, or to an assignment.

Columns for Retired/Removed tab

You only see this tab if you are integrating Percipio with another LMS and your Skillsoft Account Team turned on the LMS Integration setting. Speak to your Skillsoft representative if this is something that interests you.

The following columns are available in the Retired/Removed tab:

- **TITLE**: The title of the asset.
- **TYPE**: The type of asset. See Working with Content for a complete list of available asset types.
- **RETIRE DATE**: The date the asset is set to retire. within the specified date range.

Columns for CSV Download

The following columns are available in the Skillsoft Content Status report when you download it from for the Retiring Soon tab:

- **ASSET UUID**: A unique identifier for a specific content asset. Content UUIDs are mapped to activity codes in SumTotal Learn and are also used with third-party learner management systems.
- **ASSET ID**: Unique identifier for a specific content asset.
- **CONTENT TITLE**: The title of the asset.
- **CONTENT TYPE**: The type of asset. See Working with Content for a complete list of available asset types.
- **RETIRE DATE**: The date the asset is set to retire. within the specified date range.
- **TOTAL UNIQUE USER ACCESSES**: The all-time, cumulative, total number of individual users that accessed an asset, not limited to a date range.
- **REASON FOR RETIREMENT:** A description of why the content item is being retired. The options include:
    - TECHNOLOGY_NOT_SUPPORTED: Technology required for the course is no longer supported
    - TECHNOLOGY_VERSION_NOT_SUPPORTED: Technology version is no longer supported
    - CONTENT_OUT_OF_DATE: Content is out of date

    - EXAM_RETIRED: Exam is retired
    - REPLACEMENT_CONTENT_AVAILABLE: New or updated content is available
- **REPLACEMENT CONTENT ID:**The unique identifier for a specific content asset that replaces the retiring one. There may be more than one ID listed.
- **REPLACEMENT CONTENT TITLE:** The title of the asset(s) that are replacing the retiring one.

Settings

Use Settings to customize and configure your Percipio experience. Available settings include:

- Site Configuration: Manage the global parameters for your entire Percipio site.
- Site Branding: Customize the colors and logo for Percipio-generated notifications, Percipio for the Web, and the Percipio Mobile App
- Engagement and Notifications: Manage Percipio-generated emails and Digital Badges
- Corporate Use Policy: Set up a Corporate Use Policy in one or more languages for your organization

Site Configuration

From the **Settings** menu, select **Site Configuration** to implement global settings for your entire Percipio site. These settings include:

- Site features
- Content Settings
- Completion settings
- Internal support contact
- Security and login
- Self registration

Site Features

From this page configure how your instance of Percipio behaves for the learner.

Access this page from the **Settings** menu and **Site Configuration**, then **Site Features**.

Feature Settings

The following settings are in this section:

Ask a Mentor

Selected by default, this setting displays the Ask a Mentor link. This setting applies to Percipio for the Web, Percipio mobile app, and ELSA. With **Ask a Mentor** learners can connect with Skillsoft mentors directly from the course or channel to get advice and answers to questions via live chat or email. This is great for those learners seeking certifications or studying difficult topics.

- **Ask a Mentor - Channel level access:** Displays the link from select channels .
- **Ask a Mentor - Course level access:** Displays the link in the course player for select courses. This features stays with the course if the course is added to a custom channel or journey.

Allow note taking

Selected by default, this setting allows learners to capture important points and concepts as notes within a course or audiobook. Learners can reference their notes at any time, helping them recall what they learned and apply it on the job.

When this setting is selected, learners see a Notes tab within the course and audiobook player and a Notes page under their profile, which contains a collection of all the notes the learner took for all content items listed as hyperlinks for easy reference.

Allow sharing of content

Selected by default, this setting allows learners to share content with other Percipio users in your organization through email or by copying a link. Sharing aids in learner engagement and retention. When this setting is selected, learners see the share icon on content cards.

Allow learners to create and share multiple playlists

Selected by default, this setting allows learners on both Percipio web and the mobile app to create multiple playlists to categorize saved content. They can also share any one of their multiple playlists with other learners in your organization.

If selected, learners see the option to **Add/Remove playlist** from the more action menu on content cards and can manage their playlist from their profile.

If the setting is not selected, learners have access to the default **Save for Later** playlist that cannot be shared.

Add external learning

Selected by default, this setting allows learners to add learning that they did outside of Percipio and have it become part of their Percipio activity. For example, they can add articles read, courses taken, or conferences attended. You can report on this learning from the **Learning** menu, **External Learning**.

Audience owner emails

Selected by default, this setting sends a user an email notification when their audience ownership changes. Changes can occur as a result of a team automation rule updating or a site admin changing the audience owner of an individual audience.

- When selected:
  - Audience owners get an email if they are added or removed as an audience owner.
  - The option, **Send an email to audience owners when their audience is created**, displays in the team automation rule creation process allowing you to determine notification independently for each rule.
- When not selected
  - Audience owners do not get an email if they are added or removed as an audience owner.
  - The option, **Send an email to audience owners when their audience is created**, does not display in the team automation rule creation process.

Allow Percipio to collect job role from learners

Selected by default, this setting allows Percipio to prompt learners to select their job role from an existing list during onboarding for new users and from the home page for existing users. If users bypass the prompt, they can specify their job role at any time from the Role page. Percipio uses job role data to provide personalized content recommendations on the user's home page specifically tailored to skills needed by that job role.

When the setting is unselected, learners cannot enter a job role and do not get job role recommendations.

For more information about job roles, see the FAQ.

Allow Percipio to present guides and surveys to user via Pendo

Selected by default, this setting allows your learners and admins to get system notifications, instruction guides, and surveys via Pendo, a Skillsoft-approved third-party data subprocessor.

- Notifications, guides, and surveys are targeted to specific groups of users. For example, learners do not get admin notifications, seasoned users do not get onboarding instructions, users not using a feature do not get surveys asking how they like it.

  > **Examples:** Notifications can come in the form of a pop up drawing attention to a feature showing on the page that just released. Guides can come in the form of a pop up walking your through how to do something or showing a new user different features of the product. Surveys can show as a button allowing you to give feedback on a particular feature.

- Skillsoft uses the data collected by Pendo to build a better experience for all users.
- All user data is anonymized; Pendo does not capture any personalized identifying information (PII) about any user.
- To help us better service you, please keep the feature checked. Only uncheck it to meet accessibility standards (this feature does not yet conform to WCAG accessibility standards).

Automatically scroll banner promotions

Selected by default, this setting improves visibility of banner promotions by allowing multiple banners to automatically display one after the other every 7 seconds.

When the setting is unselected, learners must manually scroll through the list of banner promotions to see them.

To meet accessibility guidelines, each learner has the ability to pause or start their own display. The learner override setting persists until they change it.

Reporting Parameters

The **Average annual salary per employee ($)** figure is a US dollar amount used by the Estimated Value charts to calculate several key business metrics showing the ongoing value to your organization accrued through use of Skillsoft content solutions. The reporting parameter currently only supports US dollars.

To change it, type in a new number. The Estimated Value charts update when you save this information.

Course Feedback

Options in this section impact whether the learner can provide feedback on Skillsoft and customer courses. The option to give feedback is only available from Percipio for the web, not the mobile app. The Content Evaluation report tracks all results from the standard 8-question Skillsoft survey for both Skillsoft and custom courses.

Options available include:

- **Feedback on Skillsoft Courses:** Selected by default, this setting displays a **Give Feedback** button in Skillsoft-only courses. The **Give Feedback** button displays under the **Take Test** button of the course window and also on the Test Results page.
    - **Automatically display survey:** Unselected by default, this setting, when selected, automatically opens the survey after a learner com-

pletes a Skillsoft course. If selected, learners still see the **Give Feedback** button.

- **Feedback on custom courses:** Unselected by default, this setting, when selected, allows you to gather feedback for custom courses (AICC or SCORM). Learners can access **Give Feedback** from the More actions menu. All custom courses use the same survey. If selected, choose one of the following survey options:
  - **Feedback on custom courses:** Unselected by default, this setting, when selected, allows you to gather feedback for custom courses (AICC or SCORM). Learners can access **Give Feedback** from the More actions menu. All custom courses use the same survey. If selected, choose one of the following survey options:
  - **Learners complete a standard Skillsoft survey on their course experience:** Use the standard Skillsoft survey. Results appear in the Content evaluation report.
  - **Learners complete a customized survey that can be accessed in a new window upon course completion:**Outside of Percipio, in a survey tool such as Survey Monkey or Qualtrics, create a custom survey for use in all custom courses. Enter the URL from the survey tool to use your custom survey.

> **Note:** Learners can access the NASBA survey from the NASBA Activity page or from the **How to complete** link in the title bar at the top of the course player.

Completion Settings

On this page you can configure a minimum passing score and choose whether learners can receive certificates of completions.

Access this page from the **Settings** menu and **Site Configuration**, then **Completion Settings**.

Course Completion

In this section, you set the completion criteria for all Skillsoft courses. You cannot change the completion criteria for any other asset types (such as videos, audiobooks, books, or TestPreps). Custom course packages include their own completion criteria (which is set during course creation).

Minimum required assessment score: This number is the minimum score percentage a learner must score on a course test.

- This minimum score percentage applies universally for all Skillsoft courses.
- The default score percentage is 70%, but you can customize the value from 50% to 100%.
- The minimum score percentage displays to learners on the course page, as part of the course completion criteria.
- This score does not apply to TestPrep exams.

Course is complete when minimum assessment score is achieved: Selecting this option allows the user to take the assessment without having to watch any course videos. Use this option to help learners test out of content they may already know. If the course does not have an assessment, the learner must watch at least 50% of each video to achieve completion..

Course is complete when all videos are viewed or minimum assessment score is achieved: This is the default option. When selected, a learner can either achieve the minimum score or watch at least 50% of every video within the course for the course to be marked as complete.

- A video is considered viewed (complete) when a learner views at least 50% of the content.

- A learner can complete the course by achieving the minimum score percentage on the assessment (test) instead of watching all the course videos.
- If the course does not have an assessment, the learner must watch at least 50% of each video to achieve completion.

Course is complete when all videos are viewed and minimum assessment score is achieved. When selected, learners only achieve completion after they watch all videos (at least 50% of each video) and achieve the minimum score on the assessment. If the course does not have an assessment, the learner must watch at least 50% of each video to achieve completion.

Learning time entry

By default, Percipio doesn't capture learning time for learners when they access custom external linked content, custom web pages, or custom files. You can allow learners to enter the time they spend on such content by selecting this option: **Allow learners to enter time spent for non-tracked content items**.

If you allow learners to enter their own time spent learning for these non-tracked items, the time the learner enters counts toward any learning goal they set and shows in reports in their total learning time. When you allow learners to enter time, they can specify time for both types content completion criteria: The learner opens it and The learner marks it as complete.

Skill Benchmark Completion Interval

Skill Benchmarks allow learners to rate their level of proficiency for a particular skill. The results of a benchmark show how strong an individual is in that skill and where they can improve. To help a learner improve, Percipio shows them specific content recommendations targeted to those questions answered incorrectly. The learner then consumes the recommended content and retakes the benchmark to improve their proficiency.

The default number of days that have to pass before a learner can retake the benchmark is 30 days. You can change this to fit your organization's culture. The minimum value you can select is 14 days; this gives the learner a chance to review content before retaking the benchmark.

To change the default:

1. Check the box for: **Override 30 days completion interval**.
2. Specify the number of days in the **Re-take assessment interval (in days)** field.
3. Select **Save changes**.

After the selected number of days passes, Percipio sends a recommendation email to the learner prompting them that it is time to retake their benchmark to improve their score.

Completion Certificates

The settings in this section control whether learners can receive certificates of completion for either Skillsoft courses and Aspire Journeys or custom SCORM/AICC courses and custom journeys.

If a learner downloaded a certificate upon completion, and then the item had a name change, they can download the certificate again to show the new name.

Enable Completion certificates for Skillsoft Content: When selected, learners see a Download Certificate link next to each eligible, completed Skillsoft course, Aspire journey, or custom journey on their Activity page. When not selected, learners do not see the Download Certificate link. See Site Branding for customizing Skillsoft certificates of completion.

Enable Completion certificates for Custom Content: When selected, learners see a Download Certificate link next to each eligible, completed custom AICC or SCORM course on their Activity page. When not selected, learners do not see the Download Certificate link. See Site Branding for customizing custom course or journey certificates of completion.

Frequently asked questions

Can I set different course completions for individual Skillsoft courses?

No. These settings are applied universally.

Can I set different course completions for my custom SCORM and AICC course packages?

Yes, but not inside of Percipio. Course completions for custom SCORM and AICC courses are set during course creation.

My learner passed the course test, but I selected the *Authorize course completion by viewing all videos* setting. Does he have to go back and view all videos in order for the course to be marked as complete?

No. When a course has a test, a passing score automatically marks the course as complete. Selecting the **Authorize course completion by viewing all videos** setting gives the learners the option to skip the test and just view the videos.

What if a course does not have a test?

When a course does not have a test, the **Course is complete when all videos are viewed** criteria applies and a learner must watch at least 50% of every video within the course for it to be marked as complete.

How are test scores calculated?

Test scores are calculated by totaling the number of correct and partially-correct answers and dividing by the total number of questions.

- Single response questions are scored as correct (100%) or incorrect (0%).
- Learners receive partial credit on questions that have multiple answers. (For example, if a learner answers 2 out of 4 answers correctly on a matching question, he receives a partial credit of 50% for that question).

Does this completion score apply to TestPreps?

No, this setting does not apply to TestPreps. The minimum passing score varies depending on TestPrep.

Support Contacts

If you offer your own support for Percipio, you can configure the details about how users contact support with the settings on this page.

Access support contacts

To access the Support Contact page:

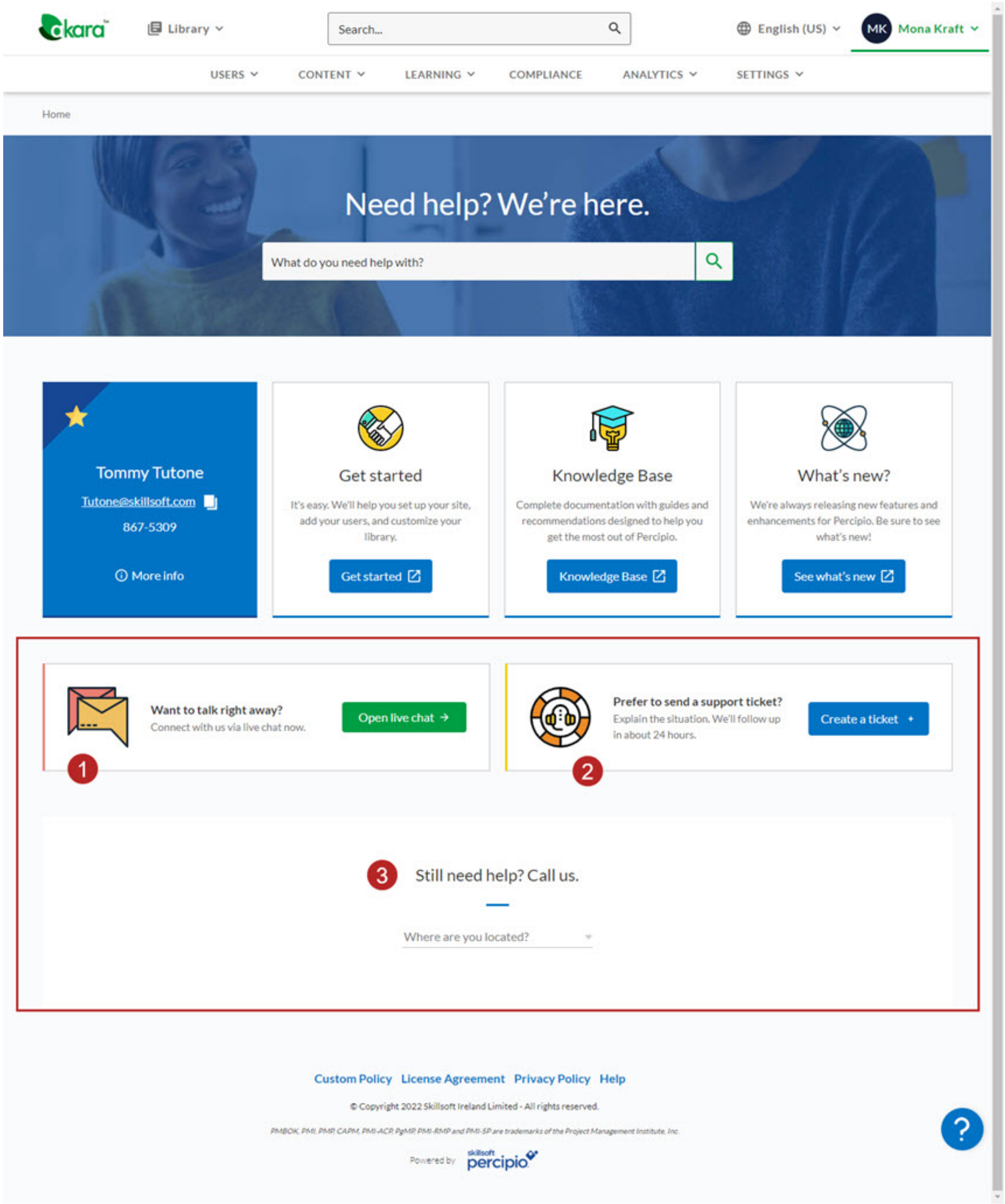
1. Select **Settings**, then **Site Configuration**.
2. From the left navigation, select **Support Contacts**.

Support options

There are three options available and you must select at least one to show to users. You can select all three.

Display Skillsoft help

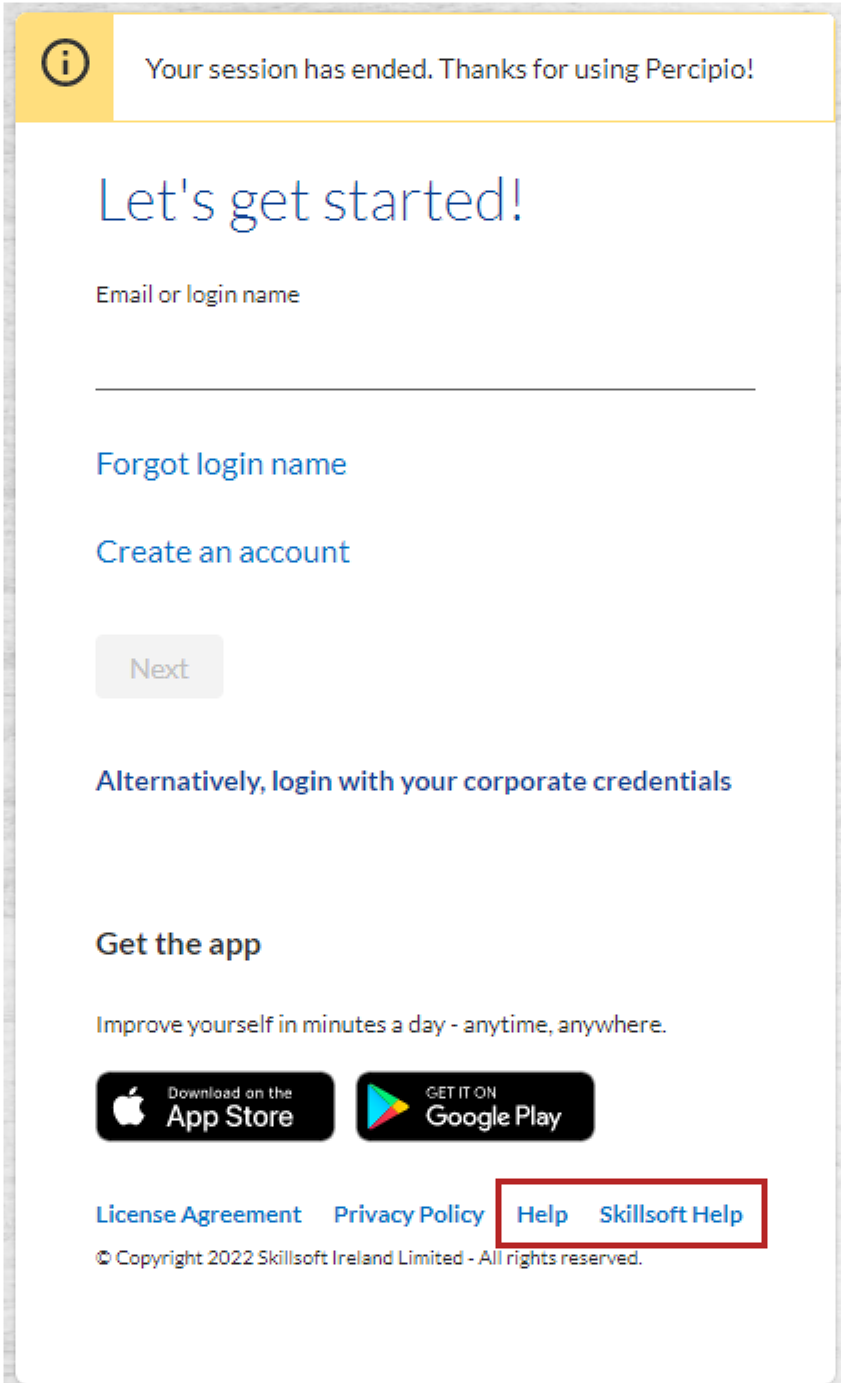
Selected by default, **Display Skillsoft help** shows links to contact Skillsoft Support on the Help page. These links include: Live chat, Create a ticket, and Call us.



This setting also controls the visibility of the **Help** link on the login page. When a user selects the Help link on the login page, they can connect with Percipio Live Help.

If you offer your own support for Percipio, you can prevent all these links from showing by unselecting **Display Skillsoft help**.

If you choose to keep this setting turned on and also add your own display link, the label on the login page changes from **Help** to **Skillsoft help**. Help directs the user to your display link.



Internal Support Contact

Select this option and add details if you want to specify a person or department within your organization for learners to contact for things like forgotten passwords. This contact is shown on the Help page and in specific scenarios. If you choose not to identify a contact person, your learners can always reach out to Skillsoft Customer Support.

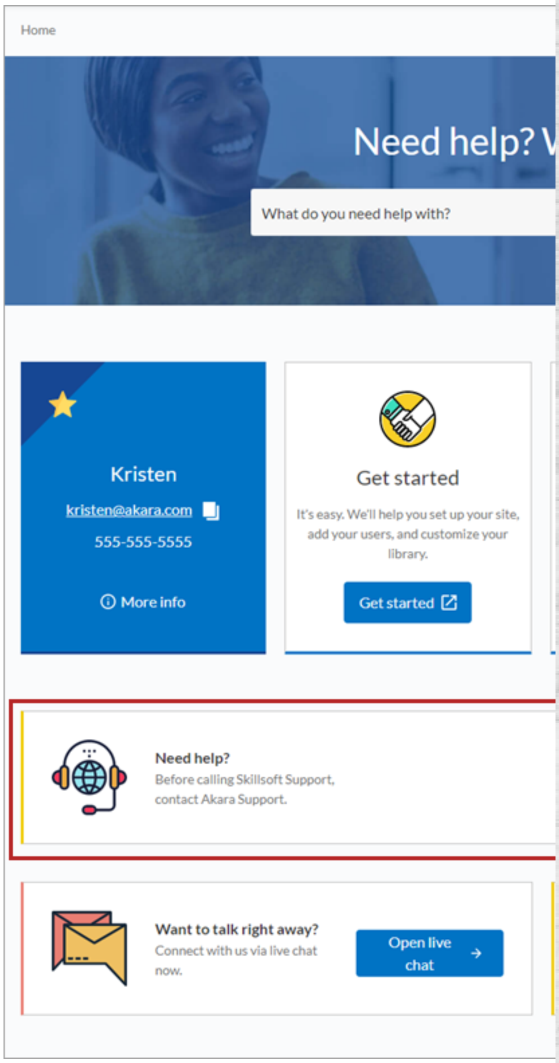
Information to specify for your internal support contact includes:

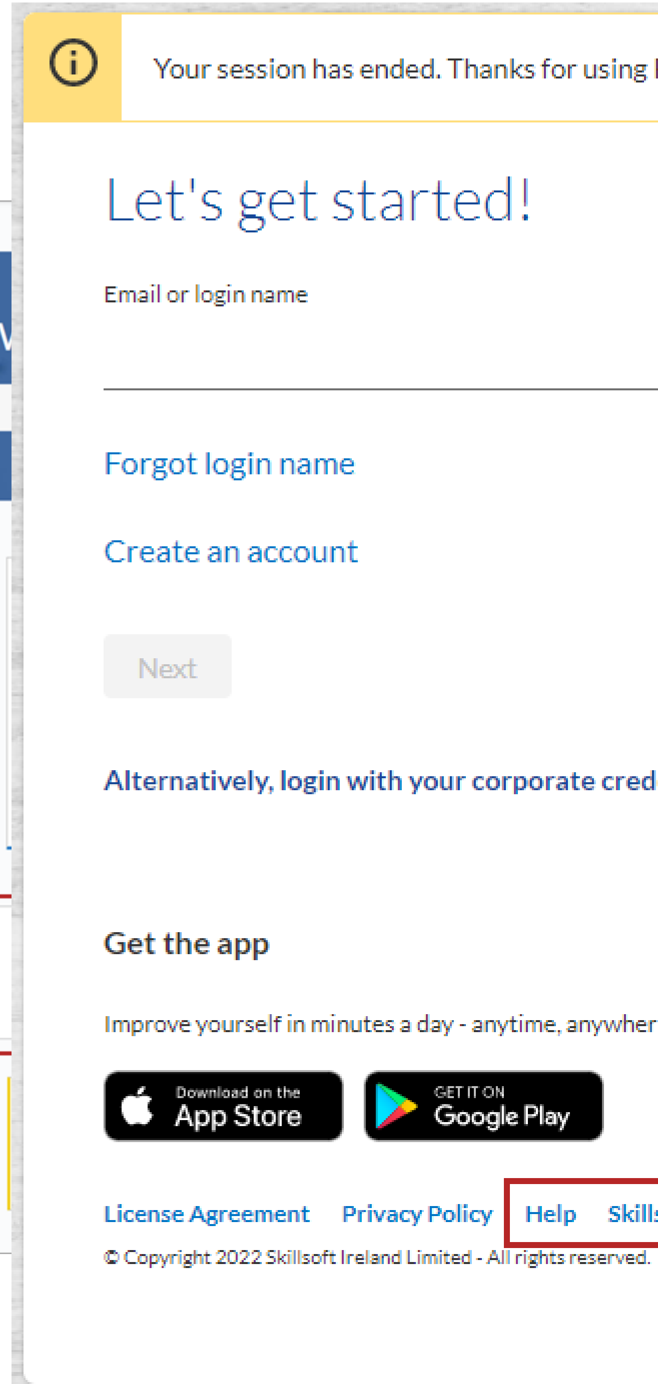
- **Language selection:** Optionally, you can set a different internal support contact for each language. Choose the language, add the contact information, then click **Save**. The default setting is English and if you do not specify other languages, all learners see the contact associated to English.
- **Name:** The person or department's name.
- **Phone number:** The person or department's phone number that learners can call for assistance.
- **Email address:** The person or department's email address that learners can email for assistance.
- **Custom message:** Optionally, you can include a custom message to your learners. For example, "The Learning Management department is based in our Baltimore office, and is available from 9am - 5pm ET."

Display additional help link

Select this option and specify details if you want to direct users to a particular URL to get help with Percipio.

Learners can access the URL from the **Get Support** button on the Help page or the **Get Support** link after selecting the **Help** link on the Login page.


Home
Need help? W
What do you need help with?
Kristen
kristen@akara.com
555-555-5555
More info
Get started
It's easy. We'll help you set up your site, add your users, and customize your library.
Get started
Need help?
Before calling Skillsoft Support, contact Akara Support.
Want to talk right away?
Connect with us via live chat now.
Open live chat


Your session has ended. Thanks for using
Let's get started!
Email or login name
Forgot login name
Create an account
Next
Alternatively, login with your corporate cred
Get the app
Improve yourself in minutes a day - anytime, anywher
Download on the App Store
GET IT ON Google Play
License Agreement
Privacy Policy
Help
Skills
© Copyright 2022 Skillsoft Ireland Limited - All rights reserved.

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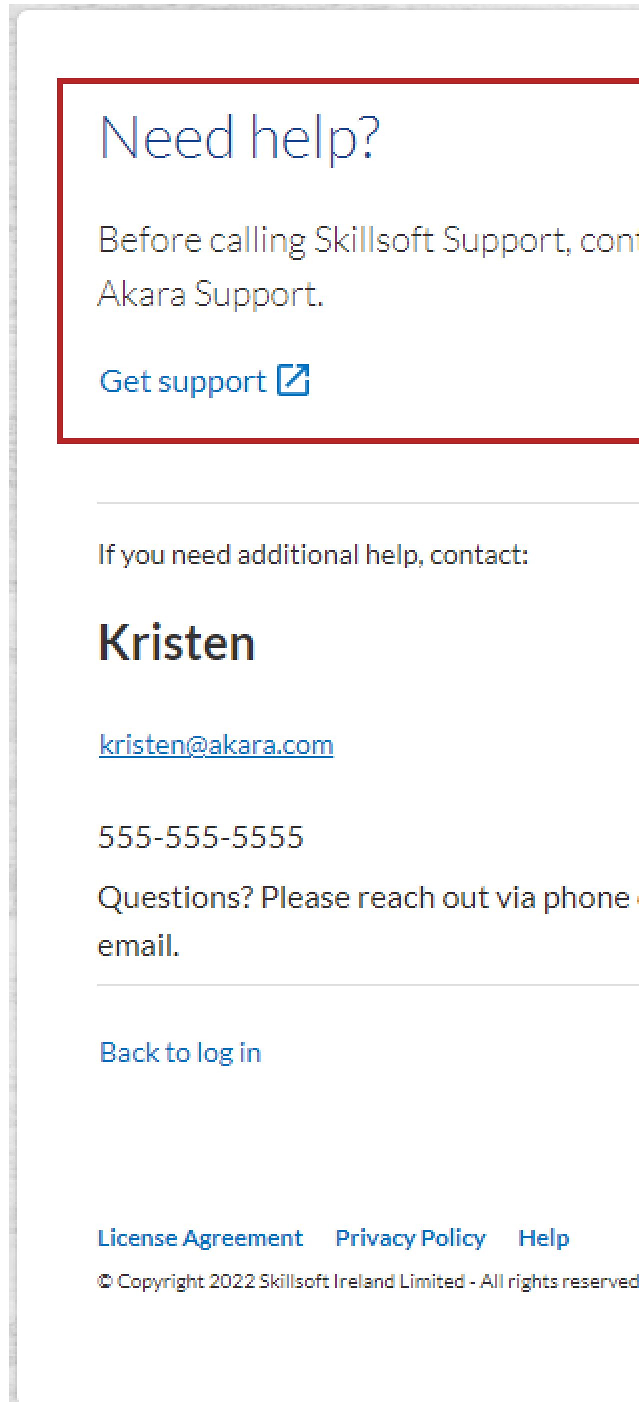


Specify the following information:

- **Language**: Choose in which languages to offer help. For each language you select, you need to identify the Title, Message, and

Help link for that language. Percipio does not translate your text. To use multiple languages:

1. From the Language dropdown, select **Manage languages**.
2. Select a language.
3. Specify Title, Message, Help link. The Help link can be different for each language.
4. Repeat steps 1 through 4 to add all desired languages. If a user selects a Percipio site language you do not define, they see the English version.

- **Title**: The text that shows in bold on the Help page or at the top on the login help page. You need to specify a title in each language you selected.
- **Message**: the text that shows under the title. We recommend offering some type of guidance or instruction. You must specify a message in each language you selected.
- **Help link**: The URL that users go to when they select the Get Support button from the Help page or the Get Support link from the login help page. This can be different for each language you selected.

Frequently Asked Questions

Can I localize the help link or Support contact?

Yes. Under each option, select **Language** and **Manage languages**. Choose a language. For each language you choose, enter translated and localized information in the fields. If a user selects a Percipio site language that you did not configure, Percipio shows the user the

English version.

Can I change the Get Support button text?

Not at this time.

Where does the Internal Support Contact information display?

The internal support contact email address displays in all email notifications replacing the default link to Skillsoft Support.

When learners are already signed into Percipio, they can view the Internal Support Contact information on the Help page.

When a learner signs into Percipio using their Percipio credentials, and not credentials provided through a single sign-on configuration, Percipio displays contact information in the following situations:

- When a learner who doesn't have an email address or security questions configured clicks the **Forgot Password?** link, the Internal Support Contact displays on the Forgot Password screen.
- When a learner clicks the **I don't know my email or login name** link, the Internal Support Contact displays on the Contact Support screen.
- When a learner who doesn't have an email address or password on file tries to log in for the first time, the Internal Support Contact displays on the Contact Support screen.

Security and Login

On this page you configure password and security settings including how long learners can stay logged in before Percipio automatically logs them out.

Access this page from the **Settings** menu and **Site Configuration**, then **Security and Login**.

Security

Prevent users from reusing last five passwords

Selected by default, this option prevents learners from entering any of their last five passwords when they reset their password.

Prompt users without email on file to provide security questions and answers

Selected by default, this option allows learners who do not have an email address in their Percipio user profile to specify security questions and answers. Percipio automatically prompts the user to specify questions and answers the second time they log in. Having questions and answers specified allows learners who forget their password to access their account without calling for support.

If you know your users will not add an email address to their profile, you can require that they specify questions and answers by selecting the option: **Make security questions and answers collection mandatory**.

If learners enter their email address on their Account Information page, the security questions are no longer used and learners are instead sent a Reset Password email.

For more information on how admin settings impact a learner's first login experience, refer to User Login Experience.

Automatically redirect users to corporate sign-in screen

This setting is only available to organizations with a SAML integration. When selected, Percipio redirects users to your corporate sign in page instead of Percipio's sign in page or for mobile users, only shows the option to sign in using corporate credentials.

- Users without corporate credentials can access your site via the on-screen link:

  https://<sitename>.percipio.com/login.html#/classic

- Unselect this option if you want to give your users the option to select the corporate sign in page or the direct Percipio sign in option.

Login timeout

Enter the number of days your users can remain signed in until they are automatically signed out of Percipio and made to reenter their sign-in credentials.

Desktop users: applies to learners accessing Percipio from their desktop browser. This setting also applies to Percipio ELSA if you are using the corporate login (SAML) at your organization.

1. Select **Days**, **Hours**, or **Minutes** from the drop-down.
2. Enter a numeric value between 30 minutes and the equivalent of 90 days. By default, desktop users remain signed in for 90 days.
    - For **Days**, the value must be between 1 and 90.
    - For **Hours**, the value must be between 1 and 2,160.
    - For **Minutes**, the value must be between 30 and 129,600

Mobile users: applies to learners accessing Percipio from the mobile app. This setting also applies to Percipio ELSA if you are using Percipio login at your organization

1. Select **Days**, **Hours**, or **Minutes** from the drop-down.
2. Enter a numeric value between 30 minutes and the equivalent of 90 days. By default Percipio mobile app users remain signed in for 30 days.
   - For **Days**, the value must be between 1 and 90.
   - For **Hours**, the value must be between 1 and 2,160.
   - For **Minutes**, the value must be between 30 and 129,600

Note: These timeout durations apply to both SAML (corporate credential sign in) and non-SAML (Percipio credential sign in) sites.

Login timeouts go into effect the next time your learner signs out of Percipio. When you change your timeout values, Skillsoft recommends you send a notification to your learners asking them to sign out of Percipio.

Multi-factor authentication via email

Multi-factor Authentication (MFA) is a secure authentication method that requires users to prove their identity by supplying two or more factors when they log in. MFA can only be used with Percipio login credentials, not single sign on configurations.

In addition to a user's login credentials, you can have users enter a 6-digit authentication code that they get to their email address that is saved in Percipio.

MFA is off by default. When MFA is on, it works for users logging into the web and the mobile app.

To turn on and configure MFA:

1. Select **Enable Multi-factor Authentication (MFA) via email**.
2. Choose if you want MFA to be on for just admin roles (site admins, learning admins, managers, content curators, content coordinators, and custom roles) or all users, including learners.
3. Choose if you want MFA to remember a user's device. If your users log into Percipio from shared devices, we suggest that you do not check this box.
4. Select **Save changes**.

The next time the user logs in they are prompted to enter their login credentials and then a 6-digit code that they receive in their email.

Frequently asked questions

Can my learners log into Percipio using their corporate credentials?

Yes, if you have SAML enabled on your site. You must enable the **Automatically redirect users to corporate sign-in screen** setting.

How do I turn on or off site security questions?

Use the **Prompt users without email on file to provide security questions and answers** setting. This setting only applies to learners without an email address in their Percipio user profile.

What if the learner does not have an email address specified in Percipio?

If the user does not have an email associated with their Percipio user account and you have MFA turned on, Percipio prompts the user to enter an email address and then sends the code to that email address.

Site Branding

Customize visible elements of the Percipio user experience such as logos, graphics, and colors. When you activate branding changes, all of the following interfaces are updated:

- Percipio for the Web
- Percipio mobile app
- Percipio-generated notifications
- Certificates of completion for Skillsoft courses and Aspire Journeys, not including NASBA or PMI/PDU courses, if turned on for your site
- Certificates of completion for custom courses and journeys if turned on for your site

Changing the brand

To change the brand of the Percipio user interface, certificates of completion, and notifications:

1. From the **Settings** menu, select **Site Branding**.
2. Make any adjustments to logo, colors, and graphics.

   Changing logo, search banners, and header background and text colors for the user interface, email notifications, and completion certificates

   From the **Headers and platform search banner** section, you can change the following fields.

   > **Note:** The custom logo added in this section displays on completion certificates if an alternate logo is not specified. Completion certificates for SLDP

and MIT co-branded courses, NASBA, and PMI/PDU courses do not use any custom logos or colors. For learners to see their completion certificates, ensure the feature is turned on in Site Configuration - Completion Settings.

Logos	• The logo displays on the header of pages in both the web and mobile apps, as well as in certificates of completion and email notifications.
	• Percipio checks all uploaded images for viruses.
	• Recommended file specifications:
	  ▪ maximum size of 2 MB
	  ▪ transparent .png
	• Recommended minimum image dimensions: 480x120 pixels
	• Uploaded images scale down to a 160x40 pixel size, so uploading any mul-

	tiple of these dimensions scales accordingly (for example, 480x120, 640x180, 800x200, etc.). Percipio requires a logo file. If you do not have one, Percipio reverts to the Skillsoft logo. Percipio displays the custom logo in the user interface and email notifications. Certificates of completion only receive this custom logo if an alternate logo is not specified in the Completion certificate section of this page. If you do not add a custom logo for your site and do not specify an alternate logo, Percipio uses no logo in the certificate for custom courses or journeys, but uses the Skillsoft logo in the certificate for Skillsoft courses and Aspire journeys. Completion certificates for NASBA and PMI/PDU courses do not use any custom logos.
Header background color	The background color for the header banner of the web and

	mobile apps as well as for email notifications.
Header default text color	Primary icon and text color for the header.
Header hover and active text color	The color of the text and icons when a user hovers the mouse over them.
Admin sub-menu selection	This setting affects the menu strip that appears for administrators. Choose one: ▪ **Dark version**: dark background with white text ▪ **Light version:** white background with dark text
Search banner text color	The color of the main text on the search banner. The search box background is always white and the search text is always black.
Search banner background image	The main background image for the home page search banner. • This image appears only in the web app. • This image only appears if there are no banner pro-

	motions.
	• Recommended file specifications:
	  ▪ Maximum size 2 MB, .png or .jpg
	  ▪ Minimum width 1280x232 px
	• This image displays at full browser width and scales down as the browser resizes while maintaining the aspect ratio.
	• The original Skillsoft search banner image size is 2297x416.
	• The banner image should use a picture with an integrated filter to maintain contrast with the search box and search banner text color.

Changing button colors for user interface and email notifications

From the **Button color** section, you can change the following field.

Button default color	This setting is for primary and secondary buttons: - Primary buttons use the default color as the background with white text. When you roll over the primary button, the color is a few shades darker. - Secondary buttons have a white background and use the default color for the text. When you roll over the secondary button, a secondary outline appears around the button. Primary buttons may appear in some email notifications.

Changing graphic on Login page

From the **Login page** section, you can change the following field.

Background image on Login page	This image appears on the login page. Recommended file specifications:

	- Maximum size 2 MB, .png or .jpg
	- Recommended minimum image dimensions:
	  - 1280 x 720 pixels
	  - 16:9 ratio
	- This image displays at full browser width and scales down as the browser resizes while maintaining the aspect ratio.
	- The login box where learners enter login credentials is 410x728 pixels but does not scale as the browser resizes. At small browser widths the login box could cover 50% of the image.

Changing logos and colors only for completion certificates

From the **Completion certificate** section, you can change the following fields for completion certificates only, separate from the user interface and email notifications.

Note: The logo and colors specified in this section appear only on completion certificates. To ensure your learners see their completion certificates, ensure the feature is turned on from Settings - Site Configuration - Completion Settings.

Logos	• The logo displays in the upper right corner of the completion certificates.
	• Percipio checks all uploaded images for viruses.
	• Recommended file specifications:
	    ▪ maximum size of 2 MB
	    ▪ transparent .png
	• Recommended minimum image dimensions: 480x120 pixels
	• Uploaded images scale down to a 160x40 pixel size, so uploading any multiple of these dimensions scales accordingly (for example, 480x120,

	640x180, 800x200, etc.). If you do not specify a logo here, Percipio uses the site logo you specified in the **Header and Platform banner search** section for your Percipio site. If you do not add a custom site logo and do not specify an alternate completion certificate logo, Percipio uses no logo in the certificate for custom courses and journeys, but uses the Skillsoft logo in the completion certificates for Skillsoft courses and Aspire Journeys. Completion certificates for SLDP and MIT co-branded courses, NASBA, and PMI/PDU courses do not use any custom logos or colors.
Primary color	This setting is for primary color of the certificate.
Secondary color	This is the setting for the secondary color of the certificate.

3. To apply all changes to all interfaces, ensure **Activate branding** check box is selected. If you leave the **Activate branding** check box unselected, changes are not applied, they are only stored in a draft state.

4. Click **Save** to apply all changes or store all changes in draft state.
5. To ensure your learners see their completion certificates, ensure the feature is turned on from Settings - Site Configuration - Completion Settings.

Restoring to system defaults

You can restore any branding changes to system defaults by clicking **Reset all to Percipio look & feel** from the top right corner of the Site Branding page.

Engagement and Notifications

From the **Settings** menu, use the **Engagement & Notifications** option to manage your Percipio-generated emails, push notifications, and engagement features.

The setting has five pages from the left navigation menu:

- Email Settings
- Email Campaigns
- Engagement
- Mobile App
- Social Learning

Email Settings

Organization name

You typically define the Organization name during initial site set up. If you did not and nothing is specified, we recommend entering your company's name or a department name in the text field. This field cannot contain the following characters: **: ; < > @ [ ] , " \ ( )** (colon, semi colon, greater than, less than, at symbol, square brackets, comma, quotation marks, backslash, and parentheses).

The Organization name can display in two places.

- As the default Menu category option when creating a custom area. You can edit how this displays in the Library.
- In Percipio generated email notifications. Use the following checkbox to control this.

  Use the **Use the Organization Name to personalize emails coming from Percipio** setting to control the display of your organization's name in Percipio-generated email subject lines, email body text, and From: fields. If you put this setting to On, you can increase learner engagement by providing better context in emails from Percipio.

  - (Default) **On:** Replaces "Percipio' with the name entered in the subject lines, body, and From: field for all Percipio-generated emails, including assignment, audience owner, Welcome, Re-engagement, and password reset emails.
  - **Off:** All emails include "Percipio" instead of an organization name.

Show username and users' email address on email templates

Your organization uses single sign-on (SSO), but your users can sign into Percipio with the user name or email address provided when learners were added to Percipio. If you only want learners to sign in with your organization's SSO, disabling this setting omits user names from all email.

- (Default) **On:** Includes user names/email addresses in all Percipio email.
- **Off:** Omits user names/email addresses from email. Note that user names/email addresses are still in user accounts and can be used for sign in.

Email template language

This controls the default language for the Percipio-generated emails. Emails are sent out in the selected language to those learners who have not signed in and selected a site language.

> **Note:** If your learners select a different language for their Percipio emails, their setting overrides this global setting for their profile only. If you upload a CSV file of learners with language preferences, these override the email template language. When learners do not select a language, all of their emails are sent in English.

To set a default email template language

1. From the drop-down list, select the default language in which you want your emails sent.
2. Click **Save email template language**.

Email collection

The **Allow Percipio to collect email addresses if missing** setting allows you to prompt users without an email address in their profile to provide their email address for the purpose of receiving Percipio communications such as live course and assignment reminders.

- (Default) **On:** Prompts users to add their email address the second time they sign into Percipio. The user can respond to the prompt in two ways:
  - The user can choose **Ask me later**, and the next time they login, Percipio prompts them again.

  - The user can select **Don't show again**, Percipio respects that and won't prompt them with the next login attempt.
- **Off:** Does not prompt users to add their email address. Learners can still add an email address from the My Profile page.

Users who are not associated with a license pool, and only have access to Percipio Compliance, are also prompted to add an email address.

Email Campaigns

Career Journeys emails

If you purchased Career Journeys as an add-on, you have the option to send an email to only the learners who can access them. This email notifies the learner about what a Career Journey is, how to access it, and how to get the most out of it.

To send a Career Journey email:

1. Select the Career Journey from the list.
2. Select which audience population to include in the email. You have two options:
   - **Limited eligible users**: Select this option if you want to send an email to only those users who are new to the Career Journey or did not open a previous Career Journey email from at least 14 days prior. Users who received a Career Journey email within the last 14 days, do not receive this email.
   - **All eligible users**: Select this option if you want to send an email to all users.
3. Select **Send Career Journeys email**.

To view a sample Career Journey email, see Career Journey emails.

Welcome emails

The **Sending Welcome Emails to new users** setting controls the type of Welcome and reminder emails that are sent when creating or editing users.

The setting choices are:

- **Send full welcome email series to new users**: All new users receive an initial welcome email. New users with access to at least one license pool can receive up to five additional reminder emails. This is the default setting. If a user does not access the site within a few days after receiving the initial welcome email, Percipio sends reminder emails until the user signs in.

  > **NOTE:** Users with access only to compliance content do not receive reminder emails, only the initial welcome email.

- **Send a welcome email to new users by default:** Percipio sends a single welcome email to all users by default, without any follow-on reminder emails.
- **Don't send by default:** Percipio does not send any welcome emails by default. You choose whether or not to send a single welcome email at the time you are creating or editing a user.

The **Email Template** setting allows you to switch between the Percipio default email templates and custom email templates. If you choose **Custom**, you can customize the email subject line, header, pre-header, and introductory text. For more details, see Customize Welcome and Reminder Emails.

To see a sample welcome email, see Welcome emails.

Note: Percipio sends emails based on what is currently selected. If a learner received the first two emails in the series as custom, but then you switch to default, the third email will be the default email. Switching from custom to default and back again retains any customizations made.

The **Sending Welcome Emails to existing users** setting includes a **Send Welcome emails** button you can click to send email to existing users who have not yet signed in.

1. Click the **Send Welcome emails** button.
2. Choose either **Send to all users who have not signed in** or **Send to selected audiences who have not signed in**.
   a. If you chose the latter, notice that all audiences are selected by default. Click the checkmark, to unselect the audiences in the list who should not receive the welcome email. At this point, you may want to unselect the **All Users** audience to prevent everyone from getting welcome emails.
   b. Alternatively, click the checkmark, next to **Select All** to unselect all audiences then, select click the next to each audience who should receive the welcome email.
3. Click **Send Welcome Emails**. Percipio sends welcome emails to all users who have not yet signed in.

Note: If you use the **Send Welcome emails** button, there is a 48 hour delay before you can use the button again. The button is disabled during this 48 hour period.

Re-engagement emails

Re-engagement emails help drive your users back to Percipio to engage with the content. If your users do not access content for 30 days, Percipio sends a weekly email that includes new and recommended content. The recommendations are based upon a user's selected skills and whether they took a Skill Benchmark. If the learner took a Skill Benchmark more than 30 days previous, the email also contains a section reminding the learner to retake their benchmark to gauge their progress.. The weekly email stops when the user signs back into Percipio, or when the user does not access content for eight weeks, whichever comes first.

- (Default) **On:** Sends Re-engagement emails to learners who have not accessed content for 30 or more days.
- **Off:** Does not send Re-engagement emails. If this setting was on and you turn it off, Re-engagement emails stop immediately.

When this setting is turned on, learners can still opt out of these emails via their Account Information page or from the Unsubscribe link at the bottom of each email.

If you want to send re-engagement emails only to a specific groups of users:

1. Click **Select Audience**. By default all audiences are selected.
2. Unselect all audiences, then find the audience you want to target and select it. Or simply unselect just those audiences who shouldn't get the email.
3. Click **Save audiences**. Emails only go to those in that audience who have not accessed Percipio in the last 30 days.

> **Note:** You can add an audience at any time. Learners in the newly added audience receive all 8 weeks of emails if they remain inactive for the duration and do not opt out.

The **Email Template** setting allows you to switch between the Percipio default email template and a custom email template. If you choose **Custom**, you can customize the email subject line, header, pre-header, and introductory text. For more details, see Customize Re-engagement Emails.

To see sample re-engagement emails, see Re-engagement Emails.

Recommendation emails

If your learners are active, and accessed Percipio content within the last 30 days, you can opt to send them a Recommendation email. When you enable Recommendation emails, Percipio sends a weekly, personalized email that includes new and recommended content as a reminder to continue learning. If the learner took a Skill Benchmark more than 30 days previous, the email also contains a section reminding the learner to retake their benchmark to gauge their progress.

- (Default) **On:** Sends Recommendation emails to active learners who accessed content in the last 30 days.
- **Off:** Does not send Recommendation emails. If this setting was on, and you turn it off, Recommendation emails stop immediately.

When this setting is turned on, learners can still opt out of these emails any time via their Account Information page or from the Unsubscribe link at the bottom of each email.

To see sample recommendation emails, see Recommendation emails.

Retiring and recently added content emails

By default, Percipio sends a monthly email that contains a link to the Skillsoft Content Status report to Percipio user roles that can access this report. The report shows the specific assets impacted so that you can update assignments, channels, journeys and content promotions as necessary.

- (Default) **On:** Enables monthly email alerting you about retiring assets due to be removed and assets being added.
- **Off:** Disables the email.

To see sample emails, see Retiring and Recently Added Content Emails.

Live Course Emails

You can license Skillsoft live courses, such as bootcamps and leadercamps. You can also configure your own live courses in Percipio. You can choose how learners get notified regarding live courses. The options include:

- Notifications for **Skillsoft live courses:** Percipio always sends email notifications for Skillsoft live courses. You cannot turn off the notifications, but you can configure how many email reminders learners receive when they are registered for a class. Learners receive the emails about Skillsoft live courses when the following happens:

- Learner registers for or cancels a class
- Learner joins a wait list
- Administrator modifies or cancels a class the learner is registered or wait listed for
- Administrator adds a class to a course that the learner has added to their playlist
- The class is starting soon. You can choose whether the learner receives one email or three emails:
  - **Send full reminder email series (3 emails):** If selected, Percipio sends the first email 7 days prior to the start of the class, the second email 3 days prior to the start of the class, and the last email 1 day prior to the start of the class. Percipio does not send emails on weekends. If a class starts on a Monday, the learner only receives the first two emails.
  - **Send a single reminder email:** If selected, Percipio sends one email reminder 3 days prior to the start of the class.

- Notifications for **Custom live courses:** If you are using Live Course, instructor-led training you have the option to have Percipio send email notifications to learners and administrators. All notifications are either on or off.

  When you set this option to **On**:

  - **Learners** receive the emails about custom live courses when the following happens:

- Learner registers for or cancels a class
- Learner joins a wait list
- Administrator modifies or cancels a class the learner is registered or wait listed for
- Administrator adds a class to a course that the learner has added to their playlist
- Administrator or manager approves or denies a registration request
- The class is starting soon. You can choose whether the learner receives one email or three emails:
  - **Send full reminder email series (3 emails):** If selected, Percipio sends the first email 7 days prior to the start of the class, the second email 3 days prior to the start of the class, and the last email 1 day prior to the start of the class. Percipio does not send emails on weekends. If a class starts on a Monday, the learner only receives the first two emails.
  - **Send a single reminder email:** If selected, Percipio sends one email reminder 3 days prior to the start of the class.

- **Administrators** receive emails when:
  - Learners register for a class that requires approval. This is a daily email; it is not a separate email for each request.

- **Approval Managers** receive emails when:
  - Learners register for a class that requires approval by them. This is a daily email; it is not a separate email for each request.

To see sample emails, see Live Course emails.

Engagement

Digital Badges and Digital Badge notifications

Learners can earn Digital Badges upon completing select content items within Percipio. Enabling Digital Badges reduces your administrative efforts, increases adoption, and drives learner engagement within the organization.

You can offer Skillsoft Digital Badges for Skillsoft courses, tracks, and Aspire Journeys and you can create your own custom Digital Badges for custom tracks and journeys.

When you turn on Digital Badges, the following occurs:

- When a learner meets the completion criteria for an item, a badge automatically generates and displays on the learner's Digital Badge page.
- If a learner completed an item prior to Digital Badges being turned on, they can open the item and select **Generate badge** to claim their badge.
- By default, all Skillsoft badges earned are public. Learners can choose to make their badges private.

- Percipio admins with reporting privileges for the Learner Activity report can see which users earned badges even if the learner opts to make their badges private.
- When learners select a badge from the Percipio Digital Badge page, Accredible creates an account for them using the email address associated with their Percipio user account.

When you turn off Digital Badges after they were on, learners can still access their previously earned badges from Percipio by selecting them, but they cannot earn new badges.

Settings for Skillsoft Digital Badges:

- **Allow learners to earn Digital Badges for course completions**
  - (Default) **On:** Enables learners to earn badges for the completion of select courses within Percipio
  - **Off:** Disables badges for courses.
- **Allow learners to earn Digital Badges for track completions**
  - (Default) **On:** Enables learners to earn badges for the completion of tracks within Skillsoft Aspire Journeys
  - **Off:** Disables badges for tracks.
- **Allow learners to earn Digital Badges for journey completions**
  - (Default) **On:** Enables learners to earn badges for the completion of an entire Skillsoft Aspire Journey. This setting doesn't apply to custom journeys.
  - **Off:** Disables badges for journeys.

Settings for custom Digital Badges:

- **Allow learners to earn Digital Badges for custom track completions**
  - (Default) **On:** Turns on the ability to create custom digital badges and allows learners to earn badges for the completion of tracks within custom journeys.
  - **Off:** Disables badges for tracks.
- **Allow learners to earn Digital Badges for custom journey completions**
  - (Default) **On:** Turns on the ability to create custom digital badges and allows learners to earn badges for the completion of custom journeys.
  - **Off:** Disables badges for custom journeys.

Allowing learners to take badges with them

If you want to allow learners to access their earned Digital Badges if they leave your company for whatever reason, the learner must reset their password on their Accredible account and link an email address to it before they leave.

Digital Badges Notifications:

When you turn on **Enable "Badge Earned" emails**:

- Any learners who earned a Digital Badge receive up to two emails per week with their Digital Badge information.
- Site Admins receive a single email on the first Monday of each month with the total number of Digital Badges earned within the organization during the previous calendar month, plus a link to the Learner Activity report. Digital Badge data is also listed in the

Executive report.

> **Note**: Course statuses in the Learner Activity report are irrespective of badge issuance dates. If a learner accesses a course during the date range specified but a badge was earned outside of that range, the report still includes a row for the course access/activity irrespective of when a badge was earned.

By default, this setting is set to **On**.

- (Default) **On:** Sends both the learner emails (up to two emails per week) and admin emails (once monthly).
- **Off:** Does not send either the learner or admin emails to your organization.

When this setting is turned on, learners can still opt out of these emails via their Account Information page or from the Unsubscribe link at the bottom of each email.

Learning Reinforcement Notifications

Drive retention with reinforcement push notifications. Learners tend to forget 90% of what they learn within the first month. Research proves that information presented over spaced intervals is learned and retained more easily and more effectively.

When you keep the **Learning Reinforcement Notifications** setting **On**, the following happens:

- When a learner completes a course that contains flashcards, they receive up to 2 push notifications over the next 30 days, starting on the Tuesday after the initial completion.
- The second notification comes out two weeks after the first notification.
- Each notification contains a link to the **My Flashcards** page in the Percipio Mobile app where the learner can test their retention.
- If the learner completes more than one course in a 30 day period, Percipio still sends only 2 total notifications in the 30 day period.
- 30 days after the learner stops completing courses, Percipio stops sending push notifications.

If you switch the **Learning Reinforcement Notifications** setting **Off**, learners receive no push notifications linking them to the My Flashcards page. Learners can still access the My Flashcard page from the profile drop down menu of the mobile app.

Learning Goals and learning goal notifications

With learning goals, Percipio learners can set a weekly learning goal of 15, 30, 45, or 60 minutes, track progress, schedule learning time in their calendars, and receive encouraging reminders. A week starts on Monday and ends on Sunday. Learners can see learning goals from both the web and mobile devices.

There are two settings for learning goals:

- **Allow users to optionally set a Learning Goal**. The default is on. This allows learners to choose a weekly goal and track progress.

- **Allow Percipio to send Learning Goal reminders to mobile app users through a push notification**. The default is on. This enables push notification reminders, encouraging learners to keep up with their learning goal each week. In addition to this setting, learners also need to enable push notifications on their devices. If a learner hasn't finished their goal by Thursday, they receive the reminder.

  Some content cannot be tracked against a goal because Percipio can't track its duration. This mostly occurs for items that are linked outside of Percipio. If you launch an item that Percipio can't track, Percipio displays a message telling you that consuming this content won't count toward your weekly learning goal.

Mobile App

Promote the Mobile App

Improve learner engagement by enabling Mobile App promotions on the sign in page, in the footer of pages, and in Percipio-generated emails. The app allows on-the-go learning with a phone or tablet, plus includes additional features like offline play and voice control.

- (Default) **On:** Enables promotion of the Mobile App with links to the Apple App Store and Google Play.
- **Off:** Disables the Mobile App promotion.

Social Learning

Questions and Answers (Q&A)

Skillsoft courses are available with a Q&A tab, which allows learners to ask a question of your organization's Percipio community about the content covered in the course. Any learner can answer questions posed, view questions from other learners, and **like** questions and answers. Learners can also follow a course's Q&A and receive email notifications when activity occurs.

If any question or answer is flagged as inappropriate, site admins receive a summary notification the day after with all the items that were flagged as inappropriate. Admins can then follow the link in the email notification to go directly to the offending content to review and decide whether to remove it.

You can configure content curators, and content coordinators with permissions to also be able to review Q&A responses flagged as inappropriate. These roles do not get notified.

The settings available are:

Display Questions and Answers (Q&A) tab in the course player

- (Default) **On:** Shows the Q&A tab for all courses where Q&A is available.
- **Off:** Hides the Q&A tab on all courses.

Allow Q&A to send email notifications to learners (recommended)

- (Default) **On:** Shows the option within the Q&A tab that allows learners to follow the Q&A. If learners select to follow a course's Q&A, they receive email notifications when someone adds a question or answer. This setting also controls whether an administrator gets notified when someone flags a question or answer as inappropriate.

- **Off:** Hides the option to follow a Q&A and prevents Percipio from sending any email notifications to learners or admins.

Policy Management

You can manage whether you require users to accept a corporate policy before they access Percipio. You also have the ability to hide the Skillsoft license agreement and privacy notice from the login page and footer.

To get started, from the **Settings** menu, select **Policy Management**.

Hide standard license agreement

By default, users can view the standard Skillsoft license agreement from the footer of all pages including the sign-in page. If you do not want users to see the license agreement, turn this setting **Off**.

Hide standard privacy notice

By default, users can view the standard Skillsoft privacy policy (privacy notice) from the footer of all pages including the sign-in page. If you do not want users to see this policy, turn this setting **Off**.

Cookie preferences

Individuals may use browser settings to refuse or disable cookies. If an individual has disabled or refused all cookies, some parts of Percipio may become inaccessible or not function properly. Percipio offers the following cookie preferences for your site:

- **Percipio cookies**: These are required to optimize performance and cannot be turned off.
- **Google cookies**: On be default, Google cookies allow Percipio to send usage data to Google for analysis. Percipio anonymizes all personal identifying information before sending any data. We analyze how people

use Percipio so we can improve it for you. Help us by keeping this switch on.

> **Note**: If you turn off Google cookies and use Google-related apps, such as YouTube for linked content, Google cookies will still be shared in those cases.

See Cookies for more information on how Percipio uses cookies.

Add your custom corporate use policy

You can create a corporate use policy for your users to accept when they first sign into Percipio. The corporate use policy only appears for each user once unless you update the policy.

If you create a policy for a language other than English, your users' browser language determines which policy displays. If a user's browser language is not one of Percipio's supported languages, the English policy displays, so you must have an English version prior to creating it in any additional languages.

To create a custom policy (in English)

1. From the left navigation, click **Custom Policy**.
2. Select **On** to have the policy viewable to users from the footer and sign-in pages. If set to **Off**, your policy will not display to your users.
3. Enter a **Policy Title**.
4. Enter the **Policy Content** and format your text using the toolbar options (keyboard accessible instructions).
5. If users need to accept the policy when they sign in, select the check box next to **Require users to accept this policy before accessing Percipio**. If you leave this blank, your policy appears

only in the footer and the sign-in page. This setting applies to all languages.

6. Click **Save custom policy**.

To create a custom policy (in other languages)

1. From the left navigation, click **Custom Policy**.
2. Select the **Language** from the drop down list.
3. Enter a **Policy Title** and the **Policy Content**.
4. Repeat steps 2 and 3 for each additional language.
5. Click **Save custom policy**.

Edit an existing custom policy

> **Note:** When you edit a custom policy and user acceptance is set to **ON**, users must accept the policy again prior to signing in.

1. From the left navigation, click **Custom Policy**.
2. If applicable, click the language drop-down and select the language of the policy you wish to edit.
3. Modify the **Policy Title** or **Policy Content**.
4. Click **Save custom policy**.

Understanding Licenses and License Pools

A license pool is a collection of content purchased by your organization. A license pool consists of assets such as courses, videos, books, book summaries, audiobooks, and audio summaries that are grouped based on subject. Examples of license pools include Business Advance and the Skillsoft Leadership Development Program. License pools do not include Skillsoft compliance content.

For each license pool you buy, you choose a number of licenses based on your user population. Each license represents a single learner "seat." You give available licenses from each pool to groups of learners as you see fit. This is called license distribution.

Consuming a License

To give a learner access to content within a license pool, you add the learner to an audience and then associate that audience with one or more license pools. This is called license distribution.

- When a learner first signs into Percipio, they consume a license from every pool they are associated with.
- Learners see only the content from the license pools they are associated with.
- When a learner consumes a license, the learner keeps access to all associated content until the rollover date of the license pool.
- There is no way to remove a consumed license from a learner and return it to the license pool prior to the license rollover date.

Organizations may have one or more license pools depending on the signed contract. A site admin controls how each license pool gets distributed across the different audiences.

Start, Rollover, and Contract End Dates

Each license pool has a start date, rollover date, and contract end date. These dates are determined in the signed Skillsoft contract. Each license pool automatically rolls into a new license pool annually when it is part of a multi-year contract.

To help remind you of upcoming expiring license pools, Skillsoft sends you a notification.

- The **start date** is the day the content in your license pool is available for consumption. Learners can access content within Percipio as of the start date, provided they are in an audience associated with the license pool.
- The **rollover date** is the day the current license pool expires and a new one is activated. The new license pool is a duplicate of the existing one and inherits all audiences that are associated with it. Any consumed licenses are released at this time.
  - Approximately 30 days prior to the rollover date in a multi-year contract, Percipio creates a new license pool with new dates.
  - Percipio activates this new license pool on the rollover date and then removes the old license pool from the list.
  - During the transition, users retain access to all content to which they are entitled.
  - Prior to the rollover date, if you removed a user from an audience that was associated with a license pool, and that user had consumed a license, that license at the rollover date is released to be consumed by another user.
- The **contract end date** is the day the content in your license pool is no longer available for consumption. Learners can still view their assignments and historical data, but they cannot access the content.

- **If all of your license pools have the same contract end date:** Your site remains active, but learners cannot access any Skillsoft or custom content. To access custom content, users must be part of an audience that is associated to at least one current license pool.
- **If your license pools have different contract end dates:** Only the content within the expired license pool becomes inaccessible to learners. The other (active) license pools are not affected.
- **If you want to extend the contract end date of your license pool:** Contact your sales representative prior to the end date.

> **Note:** Skillsoft cannot guarantee that audience that are associated with a license pool will be preserved if your license pool expires. Contact your sales representative prior to the contract end date to renew your Percipio licenses.

License pool renewals

When you **renew an existing license pool** because your contract is expiring, or when a license pool automatically rolls over to a new one during a multi-year contract:

- The existing license pool retires on the rollover date and is replaced with a new license pool that automatically has the same audience associated to it as the retired pool.
- All active learners in the associated audience have continued, uninterrupted access to the content during the transition to the new license pool.
- Learners who are signed into Percipio during the transition notice no interruption in service, but automatically consume a new license.

- All other licenses in the new license pool are freed up and get consumed when learners sign-in again.
- When a license pool reaches its rollover date, it no longer displays as an option in the License Pool list.

> **Note:** If you are using multi-site management, and if you want the number of licenses on the child site to renew automatically when the parent site renews, select **Automatically renew with parent site** for each license pool. When selecting this option, the license distribution to audiences is also retained on renewal.
>
> If you are using multi-site management, you need to reallocate licenses to all child sites if your contract changes. You then need to create new license distributions on each child site to ensure learners maintain access to the content.

If you **obtain a new license pool** or have any contract changes during a multi-year contract, you need to associate audiences with the new license pools, as you did when you first set up your Percipio site.

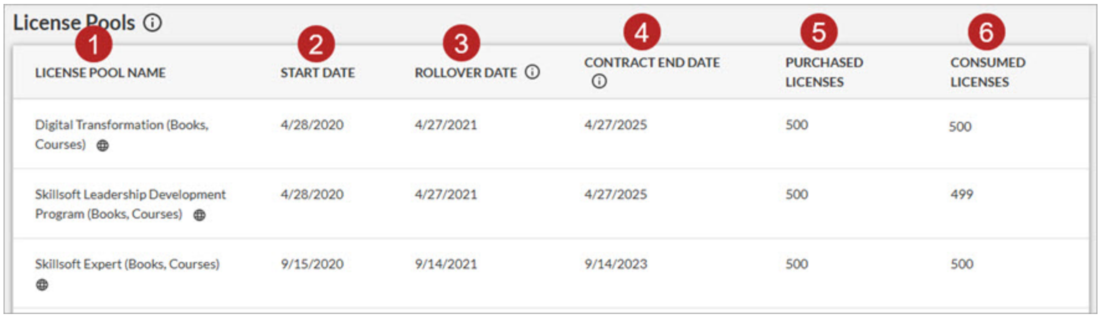
Viewing content within a license pool

You can see what content is included in each license pool using the Collections report .

- To access the Collections report, click **CONTENT > All Content by Collection** within Percipio.

License Pool List

The License Pool list provides details on all the active license pools owned by your organization.



License Pools

LICENSE POOL NAME	START DATE	ROLLOVER DATE	CONTRACT END DATE	PURCHASED LICENSES	CONSUMED LICENSES
Digital Transformation (Books, Courses)	4/28/2020	4/27/2021	4/27/2025	500	500
Skillsoft Leadership Development Program (Books, Courses)	4/28/2020	4/27/2021	4/27/2025	500	499
Skillsoft Expert (Books, Courses)	9/15/2020	9/14/2021	9/14/2023	500	500

1. **LICENSE POOL NAME:** Unique identifier for a license pool, typically relating to the general subject and type of assets in the collection. Hover your pointer over the Language icon to view your organization's available content languages.
2. **START DATE:** The day the content in your license pools is available for consumption. Your learners can access the content in the license pool once the start date commences provided they are in an audience associated with that license pool.
3. **ROLLOVER DATE**: The day the current license pool expires and a new one is activated. The new license pool is a duplicate of the existing one and inherits all audience associations. Any consumed licenses are released at this time.
4. **CONTRACT END DATE:** The day the content in your license pools is no longer available for consumption. You cannot see a license pool in the list once it reaches its end date. See more on contract end date and license pool renewal.
5. **PURCHASED LICENSES:** Total number of purchased licenses available in a license pool.
6. **CONSUMED LICENSES:** Total number of licenses currently assigned to users. The number appears in bold if the number of consumed licenses exceeds the total number of bought licenses.

> **Note:** If there are no more licenses available in a license pool, a new learner still consumes a license and can access the assigned the content. New learners are not automatically prevented from joining a license pool.

License Distribution

To make content available to your learners:

1. Add the learner to an audience.
2. Associate that audience to a license pool by creating a license distribution.

Managing license distribution

You can associate one or more audiences to one license pool. For every association, you create a new license distribution. Sometimes, a learner appears in more than one audience; this can impact how licenses are consumed:

- If a user is in two audiences associated with a single license pool, they only consume one license.
- If a user is in multiple audiences associated with two or more licenses pools with overlapping content, they consume a license in each license pool. This rule applies even if the content of a particular license pool is a subset of content that appears in the other license pool.
- If a user is made inactive after signing into Percipio and consuming a license, they continue to count as a consumed license until the anniversary date of the license pool. However, they cannot access Percipio.
- If active users are removed from an audience after consuming a license, they can continue to access that content as long as they have access to Percipio (not deactivated), or until the license expires.

Note: If you plan to use Percipio for custom content only, your learners still require access to at least one Skillsoft license pool before they can see your custom content.

License Distribution List

The License Distribution List displays details about your audiences and all license pool assignments.

- **New License Distribution:** Click to create a license distribution.
- **AUDIENCE:** An audience is a subset of your user population that you define. For each audience you can manage the allocation of licenses, create content assignments, and filter reports.
- **LICENSE POOL:** A collection of content, purchased by your organization, that includes learning assets such as courses, videos, books, audiobooks, journeys, and more. Hover your pointer over the Language icon 🌐 to view your organization's available content languages.
- **CREATED BY:** The User ID of the person who created the audience association.
- **START DATE:** The day the content in your license pools is available for consumption.
- **ROLLOVER DATE**: The day the current license pool expires and a new one is activated. The new license pool is a duplicate of the existing one and inherits all audience associations. Any consumed licenses are released at this time.
- **CONTRACT END DATE:** The day the content in your license pools is no longer available for consumption. You cannot see a license pool in the list once it reaches its end date. See more on contract end date and license pool renewal.

- **STATUS:** An audience association is either active or archived. An active association is current and means the content within the selected license pool is available to users. An archived association is not actively assigning content. When an audience association is archived, users lose the ability to access that content unless they have already consumed a license in it.
- **ACTIONS:** Click ⋮ > to archive an audience association.

Create a License Distribution

To give your learners access to content, you must associate the audience they are in with the license pool containing the content. This is called a license distribution.

1. Create one or more audiences.
2. From the Admin menu, click **CONTENT > License Distribution**.
3. Click **New License Distribution**.
4. Select an audience from the **Audiences** drop-down list. This list is prepopulated with the existing Audience List.
5. Select a license pool from the **License Pool** drop-down list.

   > **Note**: When a license pool reaches its rollover date, it no longer displays as an option in the License Pool list.

6. Click **Create**.

   When you create the new distribution, Percipio calculates the new license consumption and updates content entitlements for learners.

