Skillport 8 Administrator Guide

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CHAPTER 1
Getting Started

In This Chapter

New Features in Skillport Administrator

Skillport Administrator has many new features and enhancements to enhance your organization's elearning experience.

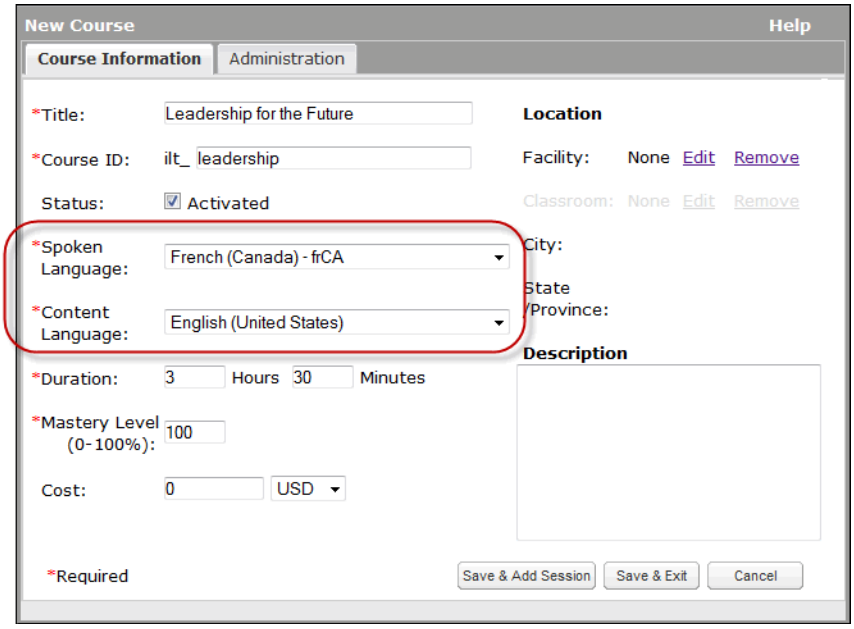
Patch 27 (November 2014)

When creating Instructor-led Training (ILT) courses, External Learning Objects (ELOs), and Learning Programs in Skillport, a new Content Language field is available. Selecting a language in this field places these content types in a learner's search results when they've opted to search for content in that content language.

Language support for Instructor-led Training (ILT) Courses

When creating a new or editing an existing ILT course, you can specify both the Spoken Language (that of the Instructor) and the Content Language (that of the course itself). Sessions inherit both the Spoken and Content Language of their parent ILT course.

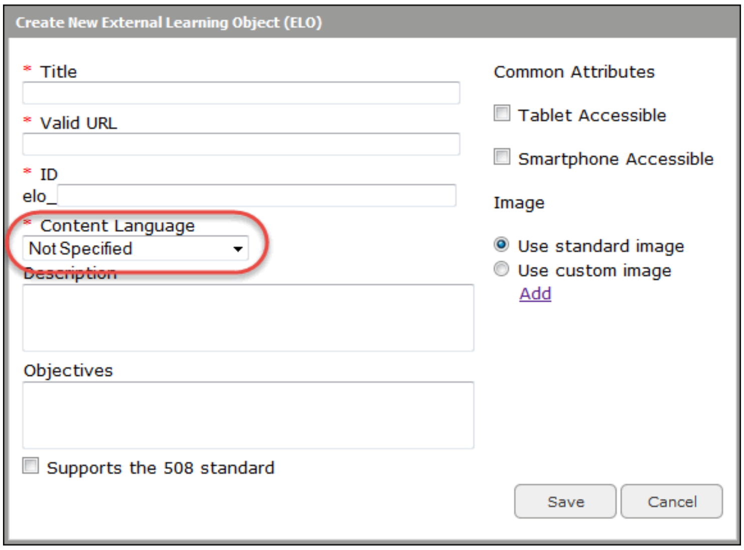
Note: Selecting **Not Specified** ensures the course displays in a learner's search results regardless of their chosen content language.



Language support for External Learning Objects (ELOs)

When creating a new or editing an existing ELO, you can specify its content language.

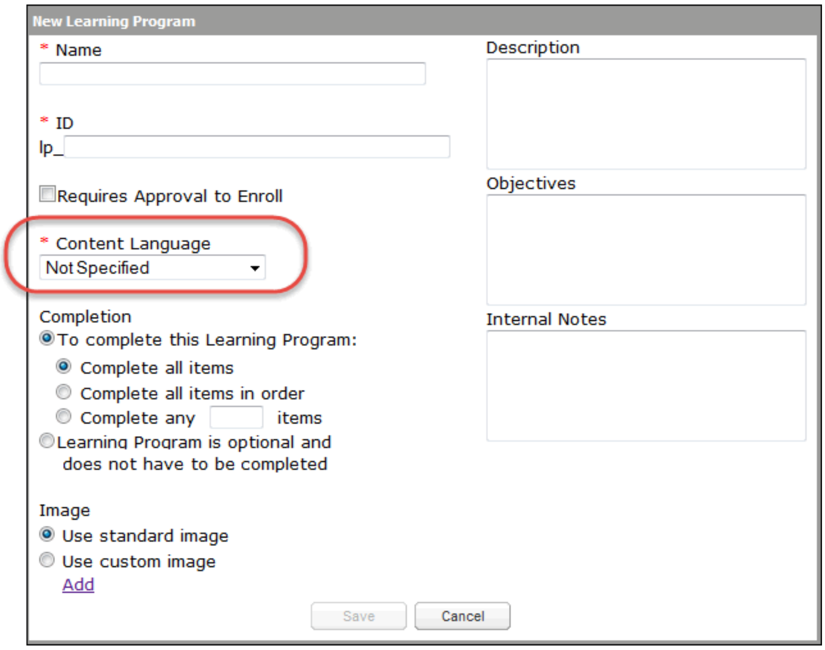
Note: Selecting **Not Specified** ensures the ELO displays in a learner's search results regardless of their chosen content language.



Language support for Learning Programs

When ***creating a new*** on page 258 or ***editing an existing Learning Program*** on page 263, you can specify its content language.

Note: Selecting **Not Specified** ensures the Learning Program displays in a learner's search results regardless of their chosen content language.



Patch 22 (July 2014)

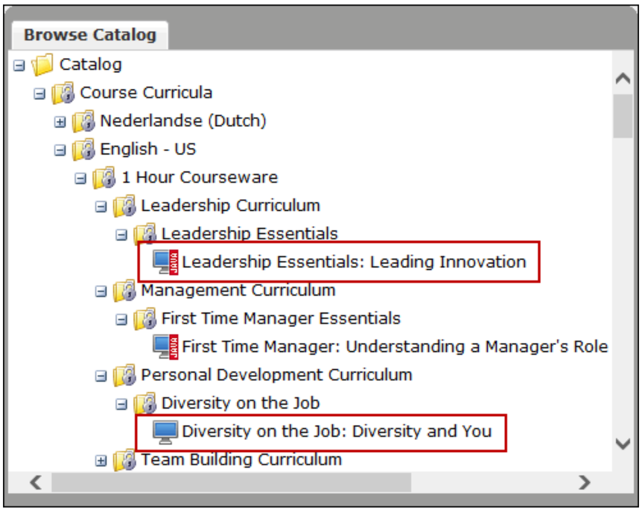
Java-free and Java-dependent content control

As part of Skillsoft's Java-free initiative, content in Skillport can now be identified as either Java-free or Java-dependent. This allows sites **without custom content installed** to control what content is made visible to learners based on whether the content is Java-free or not.

If your site is configured (using the enable_java_free_content SKP parameter) to support the new Java-free content feature, Skillport Administrator uses icons to differentiate between Java-free and Java-dependent content wherever content is displayed.

Note: Skillport sites that **have custom content installed** should keep their enable_java_free_content SKP parameter setting at **0, Disabled** (default) because the Java status of previously-installed custom content is unknown.

An example of Java-dependent and Java-free content icons displayed in the Library is shown below:



Depending on the Java-free configuration settings, Java-dependent content is available to learners in certain circumstances.

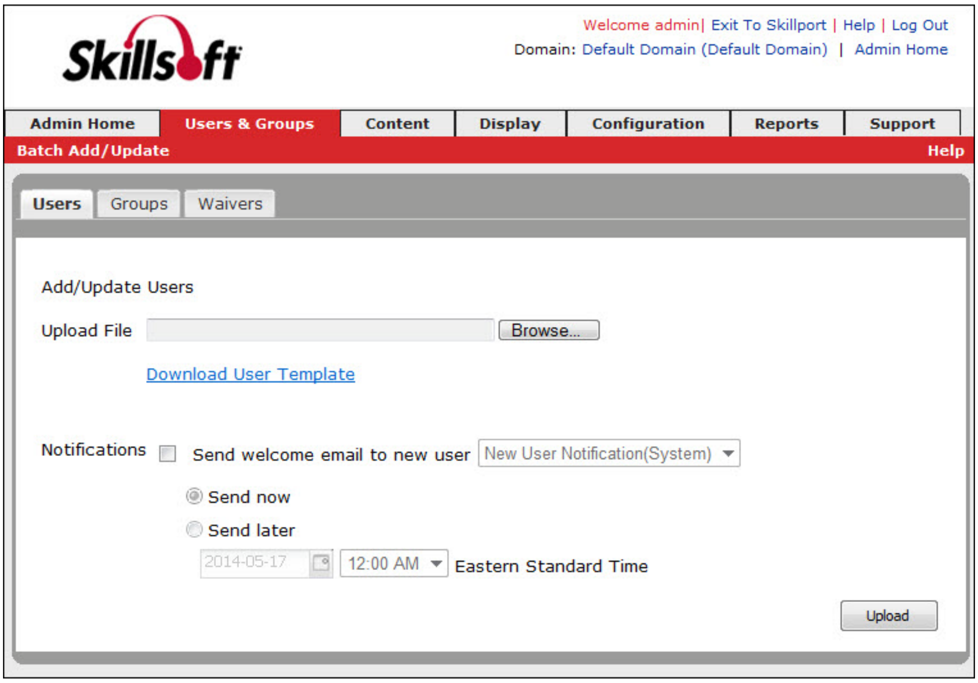
For more information, see Java-Free and Java-Dependent Content.

Patch 20 (May 2014)

Updates to the Batch Add (Users, Groups and Waivers) CSV template file and workflow

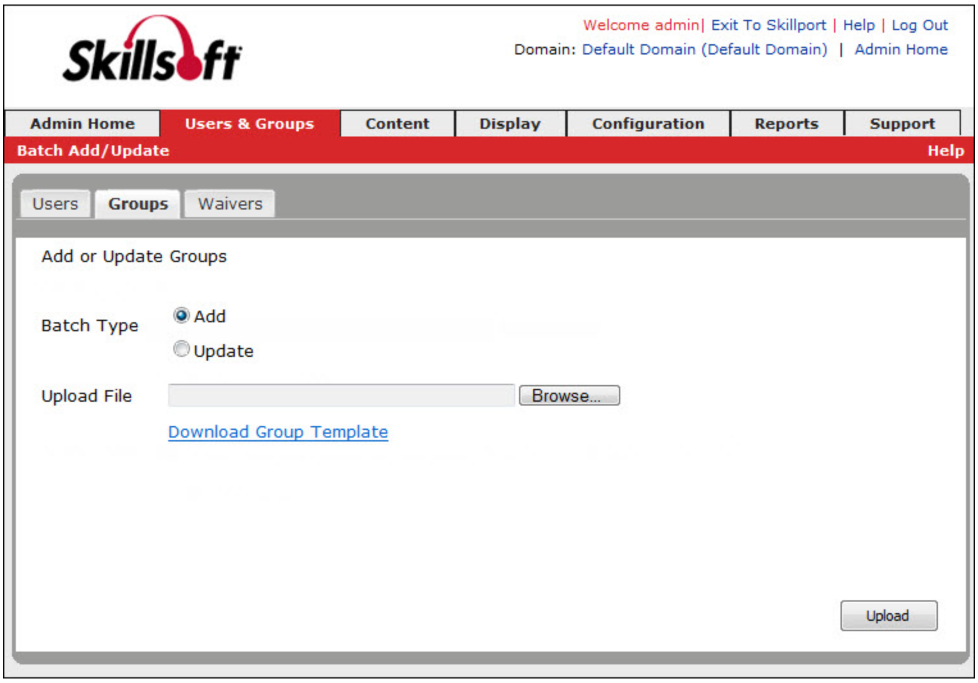
With the release of Skillport 8 Patch 20 (8.0.3285), the Batch Add functionality in Skillport Administrator has been enhanced. Updates include the following:

- For all Batch Add functionality, the file size limit has been removed.
- For all Batch Add functionality, the manual validation step is no longer necessary. Clicking **Upload** validates and uploads the CSV file.
- A simpler set of Batch Add screens in Skillport Administrator are available. There are now three tabs: **Users**, **Groups**, and **Waivers**:

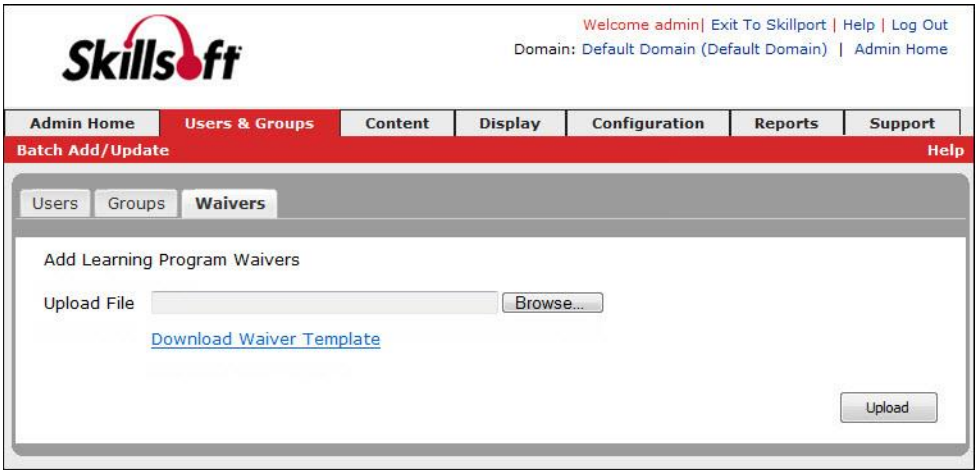


- For **Users**, a new screen is available, as shown above.
- A single batch import process now accepts new user records and updates to existing ones.
  - Customers can now submit a CSV template file with both types of changes (add and update), and the import process determines which records are new, updated, or unchanged. This replaces the previous workflow. See Add or Update Multiple Users (Batch Add).
  - **A new User CSV template is introduced with this release.** Two of the column names have changed (**sys_userid** and **sys_password**), and the order of the columns has also changed. If customers are using a version they downloaded prior to this release, the upload will fail. They must either download a new template, or modify their existing template to match the new column headers and column order.

- For **Groups**, a new screen is available. Documentation has been enhanced for completing the group CSV file, see Completing the Group CSV Template.

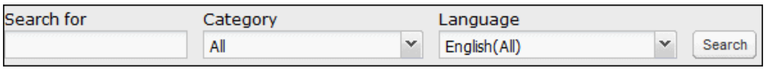


- For **Waivers**, a new screen is available, and it clearly states that this is for Learning Program Waivers. See Grant Multiple Waivers for a Learning Program (Batch Add).



Search for Assets and Folders

Some pages in Skillport include a search tool you can use to search for folders and content within the Library.



Because this search uses the same underlying search engine as the one used by learners, you can use it create several different kinds of search expressions. However, unlike the search tool learners use, you can use it to search for folders, but you cannot use it to perform "searches within search results."

Note: The Evaluation search function does not allow search at the folder level.

To use the search tool

1. In **Search for**, enter a keyword or phrase.

   For examples of search expressions, see the **Search Tips** section at the end of this topic.

2. Select a **Category**. You can:

   - choose a specific type of learning asset to search for (such as Courses, KnowledgeCenters, or Books),
   - select **All** to return all types of learning assets and folders, or
   - select **Folders** to search for folders only.

   Note: The options listed in the **Category** list depend on your context. For example, when you're viewing the Library contents, you cannot search directly for Job Aids, SkillBriefs, videos, and books because you cannot add these types of assets to the Library. Similarly, in the Learning Program Manager, you cannot search directly for KnowledgeCenters because you cannot add these types of assets to a learning program.

3. Select a **Language**. This is for the returned search results' asset language (for example, if you choose French, only assets written in French display in the search results).

   Note: You must enter your search term(s) in the language specified. This setting is disabled when you select **Folders** from the **Category** drop-down list.

4. Click **Search**.

Search Tips

The search engine ranks all search results not only by the number of occurrences of the search term, but also by their location. Results found in titles and headings are given greater weight than occurrences in the body of the text. Not only are search results listed in relevant order, but sections and topics within each course, book, or simulation are also ranked by relevancy, presenting the top results for single-click access to the content.

You may specify words or phrases alone or grouped in Boolean combinations. Phrases are groups of words enclosed in quotation marks.

The search engine is not case-sensitive.

The following are examples of search expressions:

- **Word proximity search**: Content with the words closest together is ranked higher.

  Example: advanced project management

- **Exact phrase search**: Content must match the phrase exactly to be part of the search results.

  Example: "advanced project management"

- **Boolean expressions**: Boolean operators are AND, OR, and NOT. The NOT operator cannot be used alone; use the NOT operator with the AND operator. Use quotes to group search terms.

  Example: "project management" and not "cost estimating"

- **Word Truncation Expression**: Use of the wildcard (*) character. You can use the wildcard operator at the end of a word, but not at the start or in the middle of a word.

  Example: project plan*

Searching for Specific Learning Assets

For the best results, search for the learning asset's ID number (such as a course number). If you are searching for a learning asset by its title, place the title in quotes to conduct an exact phrase search. This is particularly important if the title contains a Boolean operator (AND, OR, or NOT).

Example: "Budgeting and Financial Management: Planning Your Budget"

Search Configuration

You can modify the order of appearance of the search categories in Skillport. For more details, see ***Search*** (on page 479) in the **Configuration** chapter.

Manage Information in Tables

Many pages of the Skillport Administrator display information in a table. You can make it easier to work with large amounts of data by:

- Sorting by a specific column.
- Showing and hiding columns.
- Filtering the information to include only that which meets specific criteria.

Note: Not all tables support all features.

To sort by a specific column

5. Click the column header.

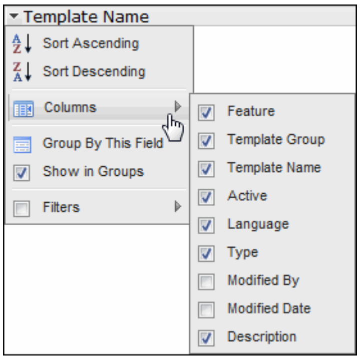
6. To change the sort order from ascending to descending or vice versa, click the header again.

To show or hide columns

1. Click the down arrow on the right end of any column header.

2. Select **Columns** from the context menu.

3. Select the check box beside each column that you want to show, and clear the check box beside each column that you want to hide.



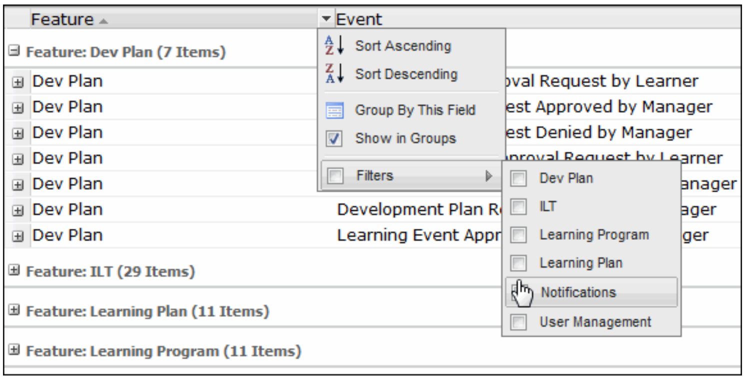
To filter information to include specific criteria

1. Click the down arrow on the right end of the column that contains the information for which you want to apply a filter.

2. Select **Filters** from the context menu.

3. Specify the criteria using the available controls. The type of controls available to you depends on the type of information shown in the column.

For example, on the Notification Management page, you can select any of the available features to show only those Notification email templates related to the selected feature.



A column with a filter applied to it has a column header in bold and italics, so you can easily understand that a filter is in use.

To remove a filter

1. Click the down arrow on the right end of the column that contains the filter(s) you want to remove.
2. Click **Filters** from the context menu.
3. Clear the check box next to each filter you wish to remove.

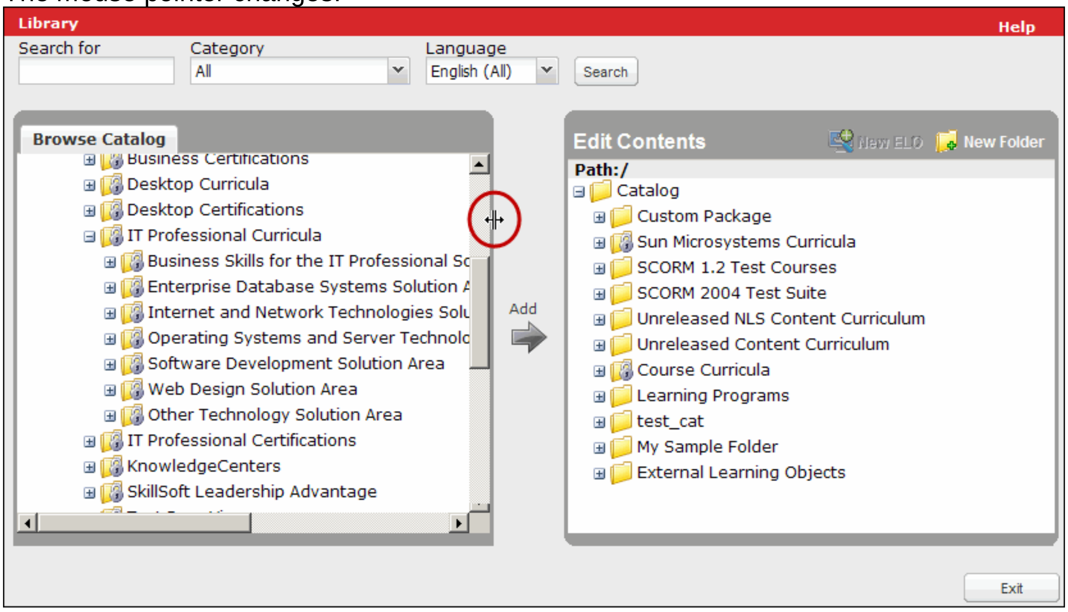
Resize Panes

If desired, you can resize the panes on those pages in the Skillport Administrator that utilize them, such as the Library or User Management page.

To resize a pane

1. Hover your mouse over the edge of the pane.

   The mouse pointer changes:



2. Click the edge of the pane, and drag it to the desired place.

Hyperlinks

You can add hyperlinks to custom pages within Skillport. These links can point to other custom pages in Skillport or to external documents and web sites. Restrictions and best practices for working with hyperlinks are described in the following sections.

Absolute Paths and Relative Paths

You can use either an absolute path or a relative path for the hyperlinks. A hyperlink must be a valid, fully qualified URL.

An **absolute path** Uniform Resource Locator (URL):

- Must start with `http://` or `https://`
- If the URL starts with `http`, then the string length should be at least nine (9) characters.
- If the URL is in the format `<string>.action`, then the length of any string should be at least two (2) characters.

A **relative path** URL:

- Must start with either `/` or `./`.
- Should be followed by a folder name or a file name.
- Should end with a file name (file name is a string that has one occurrence of '**.**').

Examples of valid URLs:

- goodbyepageurl: `goodbye.action`
- segment URL: `main.action?rightPanel=learningplan&rightAction=home`
- segment URL: `/custom/customPage.html`
- Background Image URL: `./images/Skillport-bckgrd.jpg`
- segment URL: `http://www.skillsoft.com`

Hyperlinks to Non-HTML Documents

You cannot create direct links to non-HyperText Markup Language (HTML) documents (such as a Microsoft Word document). You can save the target document as HTML and link to it, or you can define it as custom content on the Library page in Skillport Administrator.

Hyperlinks to External Documents

You can add links to pages outside Skillport using HTML or HTML with JavaScript. To add a link using just HTML, add the code shown below:

```
<a href="http://<domain>/<path>/<filename>" target="_blank">Link Text</a>
```

Example:

```
<a href="http://office.microsoft.com/support_materials/using_excel.doc"
target="_blank">Using Excel</a>
```

You can also add JavaScript to control the size of the new window with a `window.open` JavaScript event. The following code opens a window in front of, but not obscuring, the Skillport window:

```
<a href="#"
onClick='window.open("http://office.microsoft.com/support_materials/using_e
xcel.xls","Using Excel","height=800,width=400")'>Link Text</a></li>
```

Note: You cannot add content to a page by using an Internet Protocol (IP) address.

Pages with Redirection

Some URLs use a redirection in the web page to send visitors to a different URL. These pages fail to launch from Skillport and, when the user attempts to view the URL, an error message displays.

To correct this problem, open the desired site in a separate browser, copy the actual URL from the address bar, and paste it as the custom link URL.

Email Links

Add code for email links as shown below:

```
<a href="mailto: support@Skillsoft.com">Skillsoft Technical Support</a>
```

CHAPTER 2
Users and Groups

In This Chapter

User Roles

A user's role determines his privileges to the various functions in the Skillport Administrator.

For details about specific privileges each role has within Skillport, see User Privileges by Role. For details about additional privileges you can assign to each role, see Custom User Privileges.

The following roles are available in Skillport:

- **Company Admin**: This user has access to most features and functions in Skillport; this is your *site-wide* administrator. Company Admins can administer all users on the site, regardless of group membership, and administer Advanced Groups.
- **Admin**: This user has access to a subset of features and functions in the Skillport Administrator. Admins can administer only those users in the group hierarchies to which they are a member.
- **Manager**: This user has even more limited access to the Skillport Administrator than an administrator. Managers can administer only those users in the group hierarchies to which they are a member.
- **End User**: This user does not have access to the Skillport Administrator. A user with this role uses the site only to use the instructional content.
- **ILT Roles**: If your organization uses Instructor Led Training, see ILT Roles for a complete description of the available roles.

User Privileges

Important Information about Custom User Privileges

An administrator user has access to specific features in the Skillport Administrator based on his user profile. If your site has been configured to support it, you can further define a user's access to administrative features by customizing their user privileges. As you do so, keep in mind the following:

- If you clear a privilege check box (to remove the privilege for the user), all subordinate privileges are no longer available to the user. For example, if you clear the **Users & Groups** check box, the user cannot access any of the user, group, and asset assignment features.
- If a privilege is removed for a user, the user cannot access the related feature in the Skillport Administrator.
- By default, only super administrators have the privilege to delete users and groups. To grant this privilege to users with other administrator or manager profiles, you must customize the user's privileges as described in this section and ensure that you select the check box for the privilege.
- You cannot customize user privileges for users with the Super Admin profile.
- If a user has been customized with a removed user privilege, that user cannot grant that particular privilege to any other admins he creates. For example, if he does not have access to delete users, no other admins he creates will have the option to delete users.
- Users with a Manager profile cannot set custom user privileges for other users.
- Users with custom privileges are represented by icons that include a wrench, for example, for custom administrators.

User Privileges by Role

Note: You can customize the privileges of a company administrator, administrator, and manager using custom user privileges.

User and Group-specific Privileges

- A Company Admin can view and manage all users and groups on the site (company). She can also configure Configuration and Display settings for the site or for any advanced group.
- An admin can view and manage the users and subgroups contained in her normal (organizational) group or advanced group. If she is not in an advanced group, she can configure some Configuration and Display settings for the site. If she is in an advanced group, she can configure some Configuration and Display settings for only her advanced group.
- Like an admin, a manager can view and manage the users and subgroups contained in her group, but these management functions are limited to the assignment of content: Catalog assignments, Learning Plan assignments, enrollments and waivers, and Books24x7 assignments. A manager cannot configure Configuration and Display settings.

Content-specific Privileges

When assigning content to users and groups:

- A company administrator can select from all active assets in the Catalog.
- An administrator or manager can select from only the assets that are assigned (available) to her in the Catalog.

Reporting Privileges

- A company administrator can run reports on all users, groups, and content.
- An administrator or manager can run reports on the users and subgroups contained in her normal (organizational) group or advanced group. Additionally, she can run reports on the assets that are assigned (available) to her in the Catalog.

Note: In the Reporting feature, User and Group *visibility* is controlled by the User and Group Privileges setting in the Administrator tool. For more information see ***User and Administrator Privileges*** on page 501. This setting does not affect report results, nor is it available in Legacy Reporting.

Instructor Led Training (ILT) Privileges

The table below shows the ILT features available for the different Admin user roles.

Privilege	**Admin**	**Course Admin**	**Session Admin**	**Session Approver**	Instructor
View ILT courses and sessions through SkillPort catalog	X	X	X	X	X
Enroll in ILT sessions	X	X	X	X	X
Watch ILT courses	X	X	X	X	X
Assign user roles in ILT Admin interface	X				
Create a course	X	X			
Edit a course	X	X			
Delete a course	X	X			
Create a session	X	X	X		

Edit a session	X	X	X		
Delete a session	X	X	X		
Approve session registration requests	X			X	X Applies only when **Instructor Can Manage Roster** is set to **Yes** for the session.
Reject session registration requests	X			X	X Applies only when **Instructor Can Manage Roster** is set to **Yes** for the session.
E-mail all learners enrolled in a session	X	X	X		X
Close a session	X	X	X		
Force enroll learners into a session	X	X	X		X Applies only when **Instructor Can Manage Roster** is set to **Yes** for the session.
Enter test scores/attendance for a session	X	X	X		X
Edit/preview an e-mail template	X				

Users & Groups page Privileges

Page/Setting/Function	**Company Admin**	**Admin (not in advanced group)**	**Admin (in advanced group)**	**Manager**
Search	x	x	x	x
New User/Group	x	x	x	-
Upload (Users/Groups)	x	-	-	-
User/Group Info	x	x	x	-
(Group) Membership	x	x	x	-
Catalog Assignment	x	x	x	x
Learning Plan Assignment	x	x	x	x

Enrollments and Waivers	x	x	x	x
Books24x7 Assignment	x	x	x	x
Enrollments and Waivers	x	x	x	x
Send Email	x	x	x	x

Content page Privileges

Page/Setting/Function	Company Admin	Admin (not in advanced group)	Admin (in advanced group)	Manager
Catalog	x	x	x	x
Learning Programs	x	x	x	-
Evaluations	x	x	x	-
Credentials	x	x	x	-

Display page Privileges

Page/Setting/Function	Company Admin	Admin (not in advanced group)	Admin (in advanced group)	Manager
Home Page	x	x	x	-
Default View	x	x	x	-
Login/Logout Options	x	x	-	-
Navigation: Navigation Buttons	x	x	x	-
Navigation: Shortcuts	x	x	x	-
Navigation: Top Links	x	x	x	-
Navigation: Toolbar	x	x	x	-
Player Skins	x	x	-	-
Registration	x	x	-	-
Colors	x	x	x	-
Text: Login Text Customizations	x	x	-	-
Web Site Settings	x	x	x	-

Configuration page Privileges

Page/Setting/Function	Company Admin	Admin (not in advanced group)	Admin (in advanced group)	Manager
Features: Ask the Experts	x	x	x	
Features: Books24x7	x	x	x	-
Features: inGenius	x	x	-	-
Completion Criteria	x	x	-	-
Email	x	-	-	-
Search	x	x	-	-
Self-Registration	x	x	-	-
User Profile	x	x	-	-
Language	x	x	x	-
Report Configuration	x	x	x	-
Web Site Switches				
Allow Learning Plan Reminders	x	x	x	-
Allow Learning Plan Due Dates	x	x	x	-
Show PalmLink	x	x	x	-
Enable LP Enrollment/Approval Emails	x	-	-	-
Enable Credentials	x	x	-	-
Enable Forced Restart	x	-	-	-

Reporting page Privileges

Page/Setting/Function	Company Admin	Admin (not in advanced group)	Admin (in advanced group)	Manager
View and Edit My Dashboard Charts	x	x	x	x
Create Personal Report Templates	x	x	x	x
Run Reports	x	x	x	x
Schedule Reports	x	x	x	x

Manage Saved Reports	x	x	x	x
View Reports	x	x	x	x

Custom User Privileges

Custom Privilege	Function	Company Admin	Admin	Manager	End User
Configuration	Provides access to Configuration area of Skillport Administrator.	x	x		
▪ InGenius Settings	Allows the user to specify social community settings. A social community administrator moderates comments reported as abuse on the Moderate Community page in Skillport Administrator (**Content > Moderate Community**).	x	x		
▪ Multiple Completion Access	Allows the user to set specific courses to allow multiple completions.	x			
▪ Notification Access	Provides access to the Notification Management area of Skillport Administrator to manage Skillport email notifications. This privilege is granted by default to company admins, but it can be revoked.	x			
▪ Delete Email Templates	Allows the user to delete email templates. This privilege is not granted by default to company administrators, but it can be granted.	x			
Display	Provides access to the Display area of Skillport Administrator.	x	x		
Users & Groups	Provides access to the Users & Groups area of Skillport Administrator.	x	x	x	

▪ User/Group Info	Allows the user to view and edit user and group information.	x	x		
▪ User/Group Delete	Allows the user to delete users and groups.	x	x		
▪ Catalog Assignment	Allows the user to assign (expose) assets in the Skillport Library to users and groups.	x	x	x	
▪ Learning Plan Assignment	Allows the user to assign assets to the Learning Plan for individual learners and groups.	x	x	x	
▪ Enrollments and Waivers	Allows the user to enroll other users and groups in assets such as learning programs or ILT sessions, and grant associated waivers for specific assets in those learning programs.	x	x	x	
▪ Books24x7 Assignment	Allows the user to assign Books24x7 collections to users and groups.	x	x	x	
▪ Assignment Group Access	Allows the user to see and manage assignment groups, where the specific capabilities granted depend on the user's role. This custom privilege only displays if your site has been configured to support assignment groups.	x	x	x	
Content	Provides access to the Content area of Skillport Administrator.	x	x	x	

▪ Catalogs	Allows the user to make changes to the Skillport Library.	x	x	x	
▪ Publisher	Allows the user access to access the Skillsoft Publisher, which is used to upload custom content to Skillport. Specifically, this privilege provides access to perform the following two Publisher-related tasks: ▪ **General Publish**: Access to the Publisher, to upload custom content. ▪ **Passive Content**: Access to the Publisher for publishing passive content.	x	x		
▪ Course Evaluations	Allows the user to create and manage evaluations.	x	x		
▪ Learning Programs	Allows the user to create and manage learning programs.	x	x		
▪ Keywords	Allows the user to create and manage keywords. This privilege is granted by default to company administrators, but it can be revoked. It is also available to administrators, but it is not granted to them by default.	x	x		
Reports	Provides access to the Skillport Reports.	x	x	x	
Curator	The user can add and remove assets within an active Featured Topics folder in the Library. Selecting this option displays the **Add to Featured Topics** option on an asset's Details page in Skillport.	x	x	x	x
Moderator	The user receives notifications when comment are flagged as abuse in the community, and can take action against that comment (remove it) if deemed inappropriate.	x	x	x	

Create a User with Custom User Privileges

To create a user with custom administrator privileges

1. Click **Users & Groups > User Management** on the navigation bar.
2. Navigate the tree of user groups, and select the parent group for the new user.
3. Click **New User** at the top of the page.
4. Enter the appropriate information in the fields provided.

5. In **Role**, select **Company Admin**, **Admin**, **Manager** or **End User**.
6. Beside **Role**, click **Customize**.

   The Privileges dialog box displays. The list of available privileges is based on the selected role.
7. Select or clear the appropriate boxes to customize the user's administrator privileges. See Custom User Privileges for a complete listing of each available custom privilege by role.
8. Click **OK**.
9. Click **Save**.

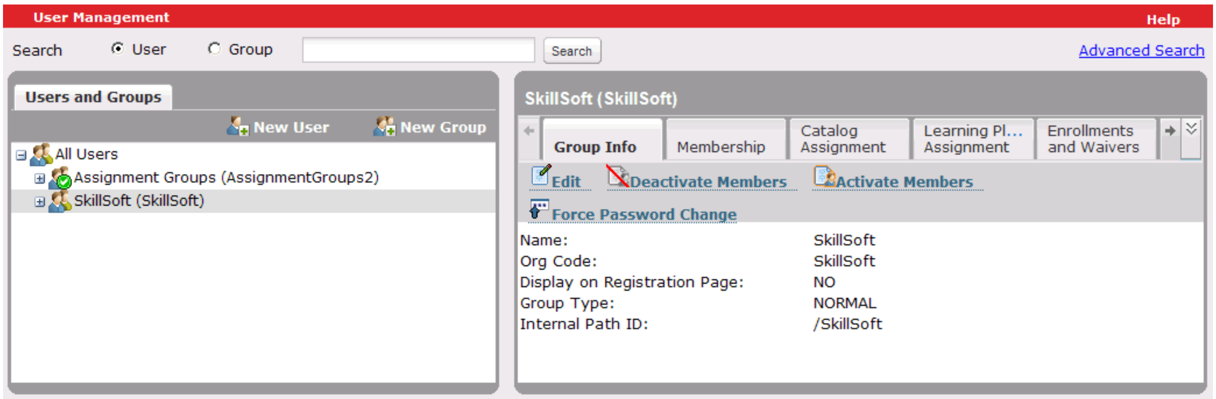
User Management

Create a New User

If you have Company Admin or Admin privileges, you can create users.

To create a user manually

1. Click **Users & Groups > User Management** on the navigation bar.



2. In the group hierarchy, navigate to the group to contain the new user, and select it.

   By default, the new user inherits the content assignments of any groups to which he belongs.

3. Click **New User**.

   The New User dialog box displays.

4. Enter information for the user in the fields provided.

Note: The user profile fields (both standard and custom) that display for entering new user information are determined by the settings specified on the Manage User Profile Fields page. See Configure User Profile Settings for more information.

Refer to the following table for accepted characters for the text fields. If you do not supply a password, first name, or last name, the **User ID** value is used. For **Status**, select **Activated** if the user should be able to sign in to Skillport; select **Deactivated** if the user should not be able to sign in.

The following information is helpful when creating a new user:

- **Single-byte characters** are the letters of the alphabet in most languages (such as English, French, German, Hebrew, Russian, and Turkish).
- **Multi-byte characters** are the letters of the alphabet in Asian languages (such as Chinese, Japanese, and Korean).
- **Latin 1 characters:** These include numbers 0-9, accented letters in various European languages (such as ç, è and ñ), and the following special characters:

  ! " # $ % & ' ( ) * + , - . / [] | : ; < = > ? @

Field	Accepted Characters
User ID (login name)	▪ abcdefghijklmnopqrstuvwxyz0123456789@$_.~'- ▪ Login names cannot start with apostrophe (') or dash (-) ▪ Non-breaking white spaces (space, tab, new line) are not allowed in login names ▪ All user-entered User IDs are converted to lower case before the validation ▪ Multi-byte characters are not allowed ▪ The following characters are not allowed: <> [ ] ( ) ; \ / Also, there is a list of reserved words that you cannot use (doing so produces an error). The following are the most common: add, all, block, count, down, force, link, mount, off, simple, tag, up

Password	▪ Passwords are case-sensitive
	▪ All single-byte characters are allowed except the following:
	  ▪ backslash (\)
	  ▪ plus (+)
	  ▪ double quote (")
	▪ Non-breaking white spaces (space, tab, new line) are not allowed
	▪ No blank passwords are allowed
	▪ Multi-byte characters are not allowed

First Name, Last Name	▪ All Latin1 and double-byte characters are accepted
Email Address	▪ abcdefghijklmnopqrstuvwxyz0123456789 - _ . * ^ + = @ ' ▪ Capital letters are accepted

1. To force the user to change his password immediately after logging in for the first time, select **Force Password Change**.

2. To add the user to an additional group:

   a. In **Group Membership**, click **Edit**.

   b. In the Select Groups dialog box, select the desired group, then click **Add**.

      Repeat this process as many times as needed to add the user to multiple groups. A user can belong to any number of normal (organizational) groups, but he can only belong to one advanced group.

      You can also use the fields provided to search for the desired group. If needed, you can enter an asterisk (*) as a wildcard that represents one or more characters.

   c. To remove a group, in **Group Membership**, select the group name, and click **Remove**.

3. In **Role**, select a role (profile) for the user.

Note: If custom user privileges have been enabled on your site, you can ***customize the user's privileges*** on page 22 to limit Administrator or Manager access to a subset of administrator features. Click **Customize** next to the **Role** drop-down list.

4. If the manager approval feature has been enabled on your site, you can specify the approval manager who must approve or reject the user's requests to enroll in learning programs and Live Learning courses.

   d. In **Approval Manager**, click **Edit**.

   e. In the Select User dialog box, navigate to the user who will be the approval manager for the new user, and click **OK**.

      You can also use the fields provided to search for the desired approval manager. If needed, you can enter an asterisk (*) as a wildcard that represents one or more characters.

5. To send an email to the newly created user:

   a. In **Send Notification Email**, select **Send Welcome email**.

   b. Select an email template from the drop-down list.

6. Click **Save & Add Another** to save this user and add another new user, or click **Save** to save this user and return to the User Management page.

Create a New Group

If you are a Company Admin within Skillport, you can create groups.

To create a group manually

1. Click **Users & Groups > New Group** on the navigation bar.

   The New Group dialog box displays.

2. Enter the information for the new group:

   - **Name**: Group names are limited to 240 characters.
   - **Org Code**: This code, limited to 240 characters, uniquely identifies the group in the system (group names do not have to be unique). If you do not specify an organizational code, the system assigns one automatically using the format org_<number> (for example, org_18). You can change the org code at any time.

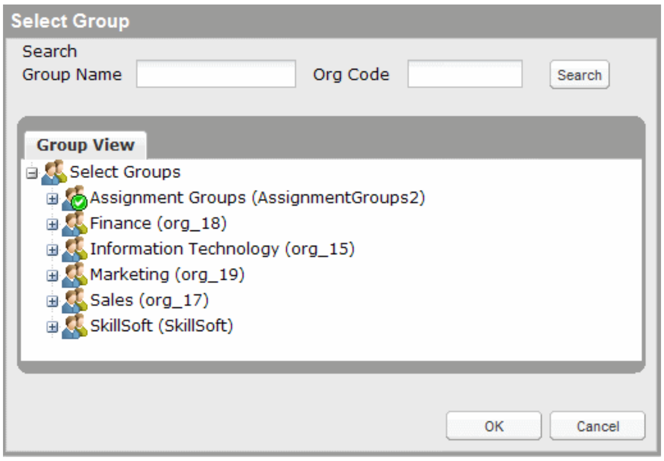
     Acceptable characters include all Latin-1 characters (codes #161-#255 inclusive), a-z, A-Z, 0-9, _ and -
   - **Display on Registration Page**: Select this option to make the group available on the self-registration page.
   - **Group Type**: Depending on the configuration of your site, you may be able to select from one or more of the following: normal (organizational), assignment, and advanced.

Note: By default, the new group inherits the content assignments of its parent group. The default is to create the new group at the top-level of the group hierarchy.

3. To change the parent group for the new group:

a. Click **Edit** next to **Parent Group**.

The Select Group dialog box displays:



b. In the **Group View** tab, select the parent group.

You can also search for a group by Group Name and/or Org Code. If needed, you can enter an asterisk (*) as a wild card that represents one or more characters.

c. Click **OK**.

The Select Group dialog box closes.

4. Click **Save.**

Working with Users

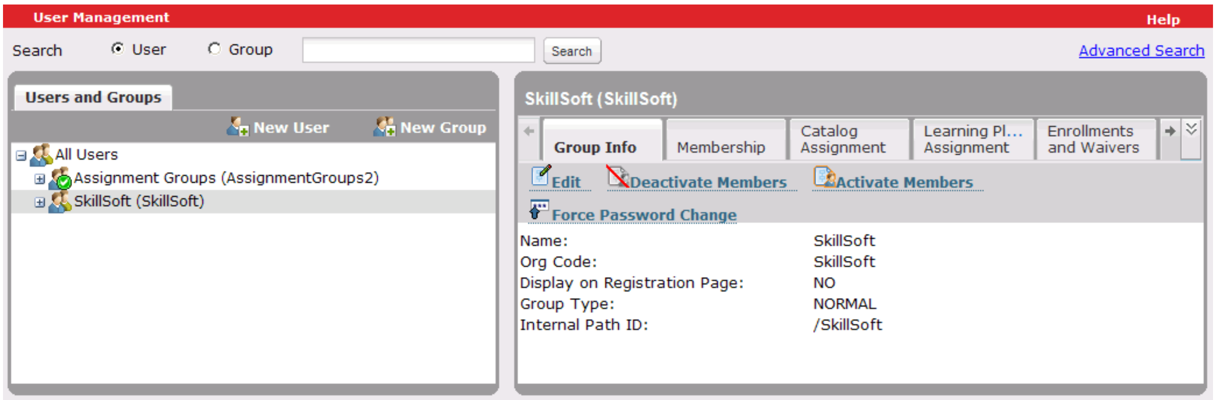
Find a User

You can quickly search for a user that you need to view or modify.

To find a user

1. Click **Users & Groups > User Management** on the navigation bar.

   The User Management page displays.



2. To search for active users:

   a. In **Search**, select **User**.

   b. Enter a user name, first name, last name, or email address.

      You can also use an asterisk (*) as a wild card that represents one or more characters.

   c. Click **Search**.

      Active users matching your search criteria display on the **Search Results** tab.

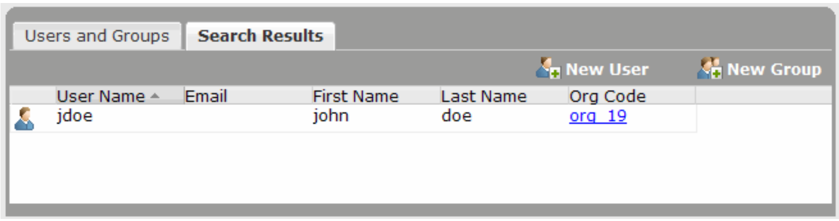
3. To search for both active and deactivated users:

   a. Click **Advanced Search**.

   b. Specify your search criteria.

   c. Click **Search**.

   The results display on the **Search Results** tab in the left pane. To find a user's location in the group hierarchy, click the corresponding **Org Code** link.



Activate or Deactivate a User

Activating an account changes its status to **Activated** and allows the user to log in. Conversely, deactivating an account changes its status to **Deactivated** and denies the user the privilege to log in.

Note: You can also activate or deactivate all members of a group at once.

To activate or deactivate a user

1. Click **Users & Groups > User Management** on the navigation bar.
2. On the **Users and Groups** tab, navigate to the desired user in the group hierarchy, then select the user.

   A user with a deactivated account has an icon that contains a red slash, such as . A user with an activated account does not have this red slash.
3. Click the **User Info** tab in the right pane, then click **Activate** or **Deactivate**, as appropriate.

Unlock a User's Account

If the account lockout feature is enabled for your site, a user who makes 5 failed login attempts is automatically locked out of the system. When this occurs, you must manually unlock the user's account.

Note: To enable this feature, contact your Skillsoft representative.

To unlock a user's account

1. Click **Users & Groups > User Management** on the navigation bar.
2. On the **Users and Groups** tab, navigate to the desired user in the group hierarchy, then select the user.

   A user with a locked account shows as .
3. Click the **User Info** tab in the right pane
4. Click **Unlock**. The user can now log in again.

Force a Password Change

If you have Company Administrator or Administrator privileges, you can force a password change for an individual user. This forces the user to change his or her password immediately after the next login.

Note: You can also force a password change for all members of a group at once.

To force a password change for a user

1. Click **Users & Groups > User Management** on the navigation bar.
2. On the **Users and Groups** tab, navigate to the desired user in the group hierarchy, then select the user.
3. Click the **User Info** tab in the right pane, then click **Force Password Change**.
4. When the message displays asking if you want to continue, click **OK**.

Delete a User

Warning: By default, only Company Administrators can delete a user. Admins can delete users if they are granted the Delete a User privilege. Deleting a user will permanently remove all user progress and the user's account. Skillsoft recommends you deactivate the user instead, to preserve user progress.

To delete a user

1. Click **Users & Groups > User Management** on the navigation bar.
2. On the **Users and Groups** tab, navigate to the desired user in the group hierarchy, and select the user.
3. Click the **User Info** tab in the right pane.
4. Click **Delete**.
5. When the confirmation message displays, click **OK**.

   The user is deleted, and the account is permanently removed.

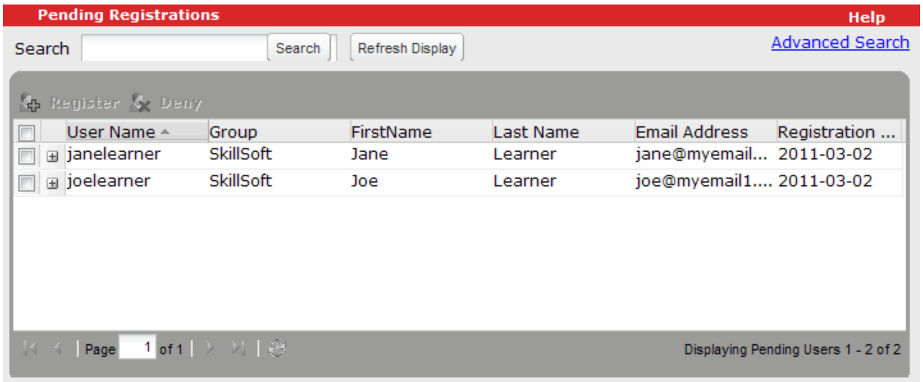
Activate Pending Users

If your site has been configured to allow self-registration, but requires the approval of an administrator for all self-registered users, you must approve those users before they can log in.

To approve users with pending registrations

1. Click **Users & Groups > Pending Registrations** on the navigation bar.

   By default, the Pending Registration page lists all users requiring self-registration approval:



2. If desired, narrow the list of pending users by searching for those that match your criteria. For information on performing searches, see ***Find a User*** on page 35.

   The list of pending users is filtered to include only those that match the criteria you specified.

   Note: To view additional details for a user, hover your mouse over the user name. To change the sort order for a column, click the column header. To restore the view to include all pending users, click **Refresh Display**.

3. To approve the self-registrations of one or more users:

   a. Select the check box beside each user name.

b. Click **Register**.

c. Click **OK**.

An email is sent to each user with their username and password to sign in to the site.

4. To reject the self-registrations of one or more users:

a. Select the check box beside each user name.

b. Click **Deny**.

c. Click **OK**.

An email is sent to each user informing them that their self-registration request was rejected.

Assign or Remove an Approval Manager

Note: The Approval Manager feature must be enabled on your site to assign approval managers. Any user with Manager, Admin, or Company Admin privileges in addition to the Enrollments and Waivers privilege automatically has the ability to act as an approval manager over all users and groups within their administrative domain, and can also approve or deny each other's requests. Any user with Company Admin privileges always has the ability to act as an approval manager.

Assigning a user to act as an approval manager allows that user access to the Approval Manager page in Skillport, where he can approve or deny asset requests and waivers for those learners assigned to him. To assign a user as an approval manager, you must first identify one or more learners who will send their requests to the user you want to set up as an approval manager.

To assign or change a user's approval manager

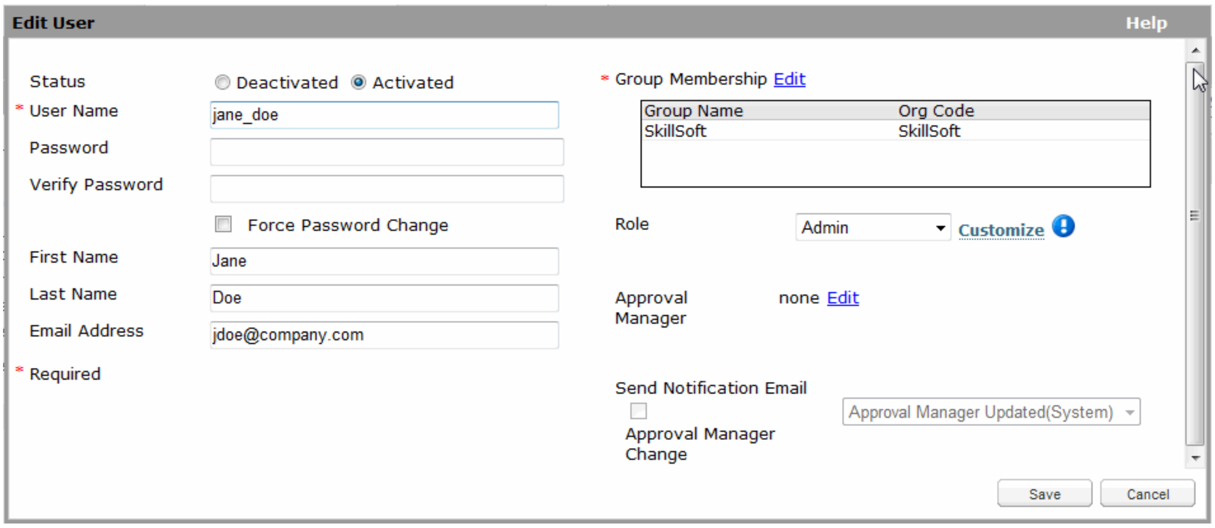
1. Click **Users & Groups > User Management**.

   The User Management page displays.

2. In the left pane, select the user for whom to assign the approval manager.

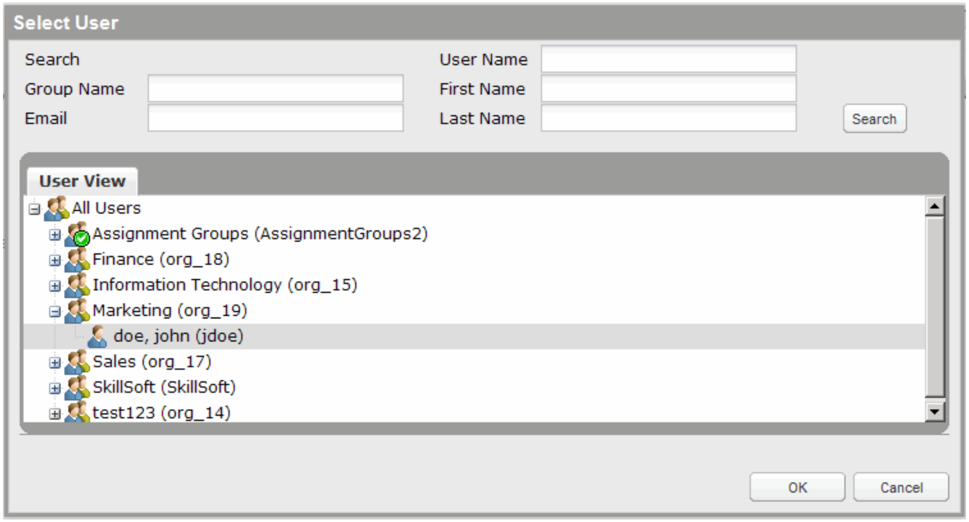
3. In the right pane, click **Edit** at the top of the **User Info** tab.

   The Edit User dialog box displays.



4. Next to **Approval Manager**, click **Edit**.

The Select User dialog box displays.



5. Select the user whom you wish to assign as an approval manager.

Note: The selected user does not need any special privileges assigned to him to act as an approval manager.

6. Click **OK**.

7. If the **Approval Manager Change** check box is enabled on your site, you can now choose whether to send an email to the learner about the change. Select the check box to send the email. Alternatively, clear the check box if you do not want to send it.

Note: No email is sent if an invalid email address is specified for the user.

8. Click **Save**.

To remove a user's approval manager

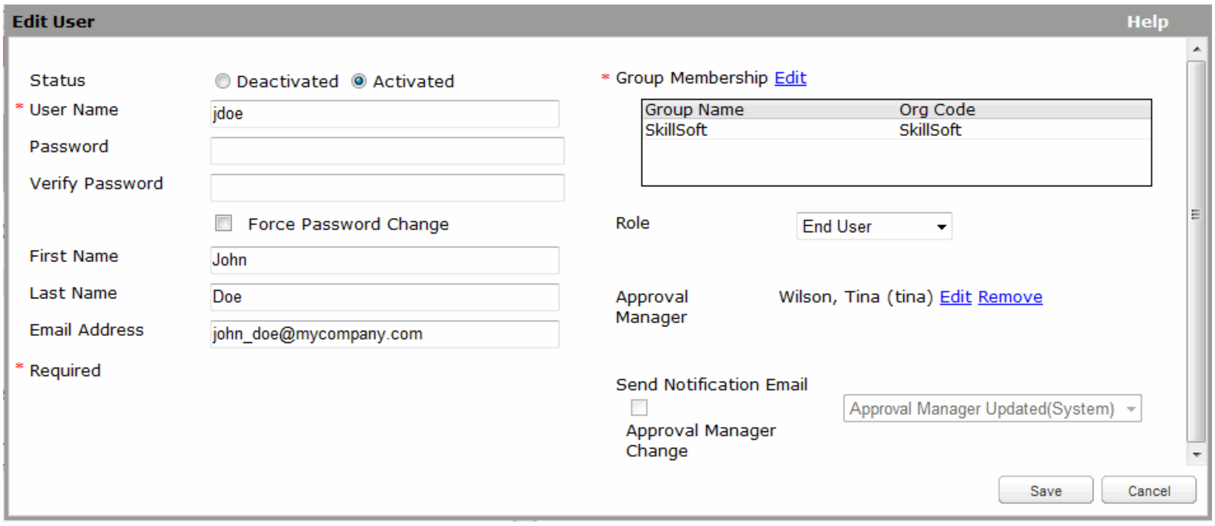
1. Click **Users & Groups > User Management**.

   The User Management page displays.

2. In the left pane, select the user whose approval manager you want to remove.

3. In the right pane, click **Edit** at the top of the **User Info** tab.

The Edit User dialog box displays.



4. Next to **Approval Manager**, click **Remove**.

5. If the **Approval Manager Change** check box is enabled on your site, you can choose whether to send an email to the learner about the change. Select the check box to send the email. Alternatively, clear the check box if you do not want to send it.

Note: No email is sent if an invalid email address is specified for the user.

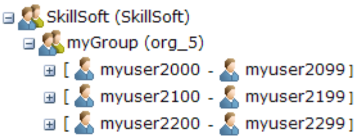
6. Click **Save**.

Working with Groups

Organizational Groups

You can add users to organizational groups ( ). You can then use the groups to control users' access to learning assets. The following are tips for working with organizational groups:

- Users can be part of more than one group. No matter the number of groups in which a user appears, there is still only ONE record for that user in the database.
- If a group contains a very large number of users, it is further subdivided alphanumerically into groups of 100 users. This enhances the performance of your site because all users do not have to be displayed at once. These "display only" groups are not actual organizational groups defined for your site. They are named using the names of both the first and last users contained therein, as shown in the following image:



- Deleting a user removes the user record from the database. Removing a user from a group does not delete the user from the system (he is only removed from the group itself).
- A user must be a part of at least one organizational group.
- You cannot delete the original admin or administrator users in the root group.
- If the Instructor Led Training (ILT) add-on module is installed and enabled, users with ILT history cannot be deleted. If you wish to delete a user from the system, you can either remove their ILT records using the ILT module and then delete them, or deactivate the user instead of deleting them.
- If an Approval Manager is deleted, all users assigned to that account will be left without an Approval Manager. Prior to deleting an Approval Manager:
  - You should first assign those users to a new Approval Manager.
  - Run the Users Manager Report to locate all users assigned to the Approval Manager being deleted and assign those users to a new Approval Manager.
  - You can then delete the original Approval Manager account.
- Only registered users are shown in the user tree in the User & Groups Management page.
- Users are either active (able to log in and access learning events) or inactive (unable to log in).

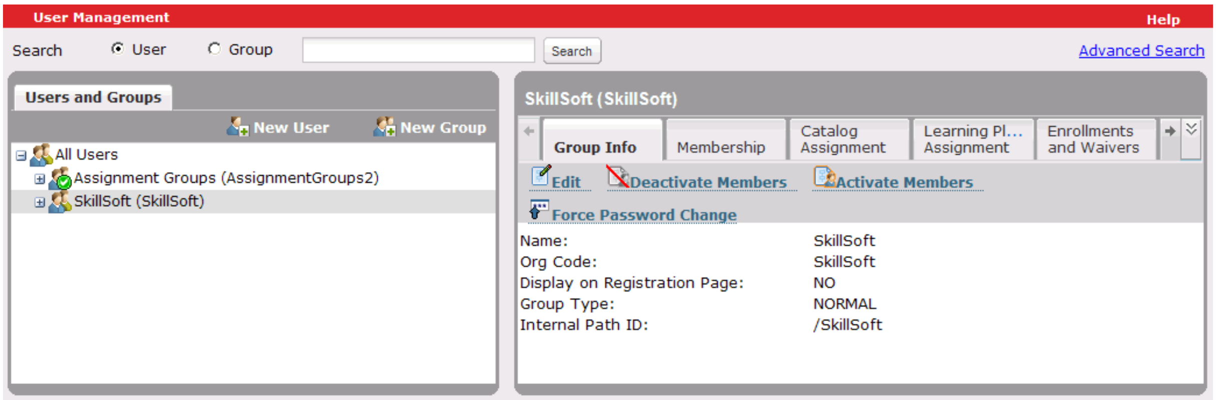
Find a Group

You can quickly search for a group that you need to view or modify.

To find a group

1. Click **Users & Groups > User Management** on the navigation bar.

The User Management page displays.



2. To perform a basic search:

   a. In **Search**, select **Group**.

   b. Enter a group name or org code.

      You can also use an asterisk (*) as a wild card that represents one or more characters.

   c. Click **Search**. Groups matching your search criteria display on the **Search Results** tab.

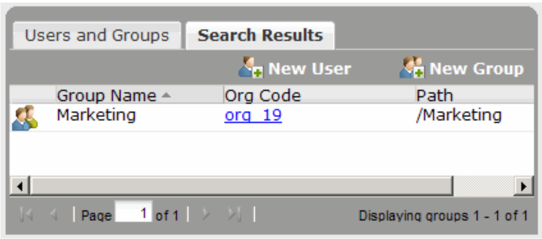
3. To perform an advanced search:

   a. Click **Advanced Search**.

   b. Specify your search criteria.

   c. Click **Search**.

   The results display on the **Search Results** tab in the left pane. To find the group's location in the group hierarchy, click the corresponding **Org Code** link.



Activate or Deactivate the Members of a Group

Activating an account changes its status to **Activated** and allows a user to sign in. Conversely, deactivating an account changes its status to **Deactivated** and denies the user the privilege to sign in.

You can activate all members of a group at once. This activates any deactivated members of the group and all subgroups. You also can deactivate all members of a group with the same type of effect.

To activate or deactivate the members of a group

1. Click **Users & Groups > User Management** on the navigation bar.

2. On the **Users and Groups** tab, navigate to the desired group, and select it.

   A user with a deactivated account has an icon that contains a red slash ( ). A user with an activated account does not have this red slash.

3. In the right pane, click **Activate Members** or **Deactivate Members**, as appropriate.

   All users are activated or deactivated as needed.

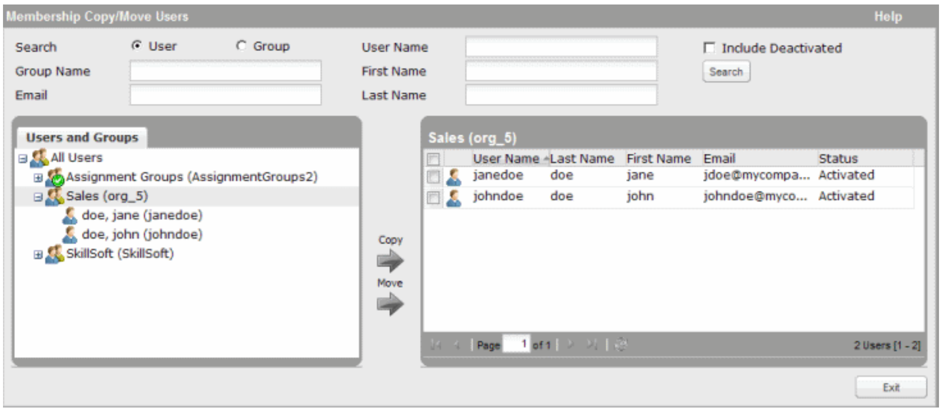
Modify the Members of a Group

Note: A user must be a member of at least one organizational group.

To modify the members of a group

1. Click **Users & Groups > User Management** on the navigation bar.
2. On the **Users and Groups** tab, navigate to the desired group in the group hierarchy, then select the group.
3. Click the **Membership** tab in the right pane.
4. To add existing users to the group:

   a. Click **Copy/Move Users** in the right pane.

   b. In the user hierarchy in the left pane, browse to or search for the user to copy to the new group.

   c. Select the user, and click **Copy**.

      The user is added to the group whose membership displays in the right pane.

      (You can also move users out of the group whose contents are displayed in the right pane: Select the users in the right pane, select the target group into which to move the users in the left pane, and click **Move**.)

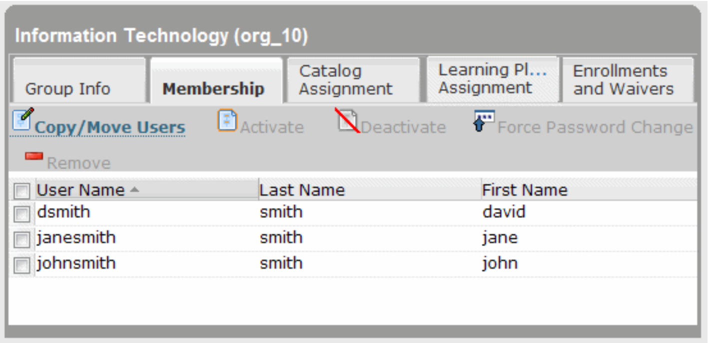
   d. Repeat this process as many times as needed to add additional users.

   e. Click **Done**.

5. To remove members from the group:

   a. In the user hierarchy in the left pane, browse to or search for the group, and select it.

b. In the right pane, click the **Membership** tab.



c. Select the check box beside each user you want to remove from the group, and click **Remove**.

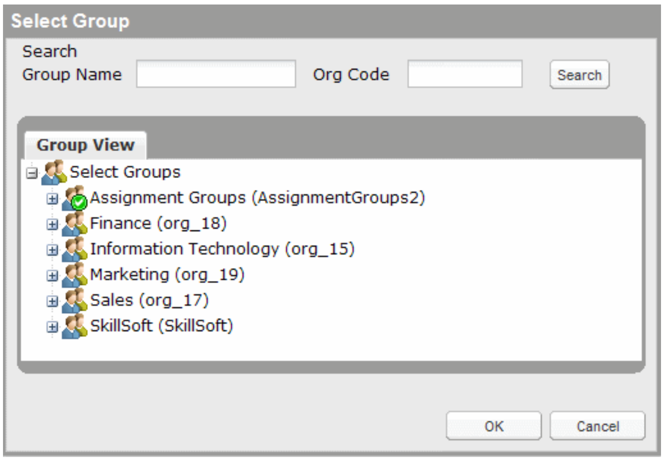
Change the Parent Group for a Group

You can change the parent group for a group at any time. Be aware that a group will inherit the content assignments of the new parent group unless the group has explicit content assignments (which override all inherited ones).

To change the parent group for a group

1. Click **Users & Groups > User Management** on the navigation bar.
2. On the **Users and Groups** tab, navigate to the desired group in the group hierarchy, then select the group.
3. Click the **Edit** tab in the right pane.
4. Click the **Edit** link next to **Parent Group**.

   The Select Group dialog box displays.



5. Navigate to the desired group, and select it.

   You can also search for a group by Group Name and/or Org Code. If needed, you can enter an asterisk (*) as a wild card that represents one or more characters.
6. Click **OK**, and then click **Save**.

Force a Password Change for a Group

If you are a user with a Super Administrator or Company Administrator role, you can force a password change for all members of a group. This forces both the members of the group and the members of all child groups to change their passwords immediately after the next login.

To force a password change for a group

1. Click **Users & Groups > User Management** on the navigation bar.
2. On the **Users and Groups** tab, navigate to the desired group in the group hierarchy, then select the group.
3. Click the **Group Info** tab in the right pane
4. Click **Force Password Change**.
5. Click **OK**.

Delete a Group

By default, only super administrators can delete groups. However, this ability can be granted to company administrators and administrators as a custom user privilege.

If you are **not** a super administrator, you cannot delete a group if it contains users that are not also members of another group. You must manually delete or move these users (both immediate ones and those within subgroups, if any) before you can delete the group. This is to prevent the inadvertent deletion of users.

To delete a group

1. Click **Users & Groups > User Management** on the navigation bar.
2. On the **Users and Groups** tab, navigate to the group you want to delete, then select the group.
3. Click the **Group Info** tab in the right pane.
4. Click **Delete**.
5. Click **OK**.

Advanced Groups

An advanced group is a special class of user group that has different site settings from its parent company. Administrators can enable certain add-ons and different web site color schemes for each advanced group, while maintaining reporting capabilities for their entire company.

Note: The maximum number of advanced groups supported on a site is 100.

When creating advanced groups, remember the following:

- Use advanced groups sparingly. Too many advanced groups will make it hard for you to keep track of the different settings for each group.
- Advanced groups have their own settings and are not affected by changes to company settings. However, note that some settings are company-only and cannot be changed at the advanced group level.
- You must create advanced groups directly under the All Users level of the company hierarchy.
- An advanced group cannot be a member of another group.
- If you create advanced groups and then install an add-on module, such as Books24x7 or Ask My Mentor, to your company, you need to enable the add-on module in the Configuration menu.
- A user may belong to only one advanced group, although they can belong to more than one standard group.

Example

Your organization may have three separate divisions: sales, production, and administration. You may want to enable the Books24x7 add-on module for just two of those divisions, and the Ask My Mentor add-on module for the third. You may also want to use different color schemes for each division's implementation of the site.

You could achieve this by creating three separate companies, each with its own installation, but this would not allow you to run reports across your entire organization. By creating an advanced group for each division, you can treat each advanced group as its own entity while retaining the capability to run reports on all of them.

Create an Advanced Group

- Users with a **Company Administrator** role can create advanced groups. They can also edit settings for the parent company and for any advanced groups.
- Users with an **Administrator** role who belong to an advanced group cannot create advanced groups, but they can edit company settings and those for the advanced group to which they belong. Users with an Administrator role who do not belong to an advanced group can edit company settings, but they cannot edit advanced group settings.

Note: To create an advanced group, the `max_advanced_groups` SKP parameter must be set to 1 or greater by a super administrator.

To create an advanced group

1. Click **Users & Groups > New Group** on the navigation bar.

2. In the New Group window, enter the information for the new group. You must select **Advanced** as the **Group Type**. For help with this step, see ***Create a Group Manually*** on page 33.

3. Click **Save**.

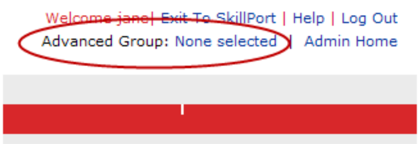
4. Make the advanced group that you just created the *active* advanced group. For help with this step, see ***Select an Advanced Group to Administer*** on page 47.

5. Change the settings of the advanced group. Note that some settings can only be changed by a Super Administrator or Company Administrator.

   For information on the specific settings that you can configure for an advanced group, see ***Settings Configurable for Advanced Groups*** on page 48. Your access to the various administrative functions depends on your user privileges.

   Note: As you modify settings for an advanced group, other sitewide settings are available to you, such as Completion Criteria or Login Text Customizations. If you modify a sitewide setting, you do so for the entire Skillport site (company), not just the currently-selected advanced group.

Select an Advanced Group to Administer
You can configure settings for the entire Skillport site or for a specific advanced group. The context in which you are working is always indicated in the upper-right corner of the page, as shown in the following image.



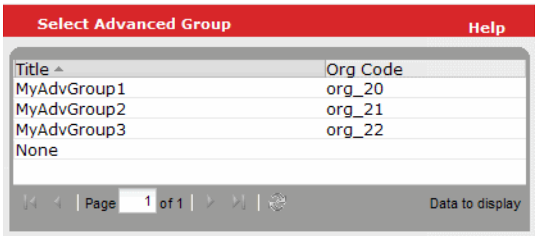
If you are configuring settings for the entire Skillport site, the name of the Advanced Group displays as **None selected**.

Before you perform any Skillport administration tasks for an advanced group, you must make current the advanced group in which you want to work. The current advanced group is the one that will be affected by your changes (for example, creating new users or modifying settings).

To select an advanced group to administer

1. In the upper-right corner of the page, click **None selected** or the name of the current advanced group.

   The Select Advanced Group page appears.



2. Select the name of the advanced group for which you want to configure settings.

   The name of the advanced group you selected displays in the upper-right corner of the page to indicate that it is now the current advanced group.

Settings Configurable for Advanced Groups
The tables that follow list the Configuration and Display settings that are 1) available to company administrators and 2) configurable at the advanced group level.

Configuration Settings	Settings Customizable for Advanced Groups
Features: Books24x7	All settings
Notification Management	All settings
Notification Settings	All settings
Self-Registration	▪ Comma-separated list of Administrator e-mail addresses
Language	All settings
Report Configuration	▪ Certificates of Completion settings
Web Site Switches	▪ Allow Learning Plan Reminders ▪ Allow Learning Plan Due Dates ▪ Enable Forced Restart

Display Settings	Settings Customizable for Advanced Groups
What's New Page	All settings
Web Site Colors	All settings
Default View	All settings
Navigation	All settings
Quick Links	All settings
Toolbar	All settings
Web Site Settings	All settings

Assignment Groups

An assignment group is a special class of user group that you can use to control Catalog and Learning Plan assignments for users based on factors other than your organization's existing group hierarchy. For example, assume your group hierarchy includes the following organizational groups:

- Marketing
- IT
- Finance

Your organization also has a Leadership Team with members from each of the preceding organizational groups, and you want to be able to assign assets to the Leadership Team. To accomplish this, you would create an assignment group with those members.

Assignment Groups versus Organizational Groups

To use organizational groups and assignment groups effectively, it is important to understand when to use these two types of groups.

Organizational Groups	Assignment Groups
Have members who belong to the same organization, for example, the Marketing department.	Have members who can belong to any organization.
Control access to some Administrator functions such as reporting capabilities and the management of users and groups. For more information, see ***User Privileges by Role*** on page 22.	Do not control access to functionality. Only control the assignment of learning assets to users.
Can have a hierarchy. That is, organizational groups can contain other organizational groups.	Are non-hierarchical. All assignment groups are located under a top-level group named Assignment Groups. Assignment groups cannot contain other groups—neither organizational groups nor other assignment groups. Because assignment groups are non-hierarchical, you cannot copy or move other groups into them.
Can be moved into other organizational groups. However, they cannot be moved into assignment groups.	Cannot be moved into other groups. Assignment groups can only exist under the top-level group named Assignment Groups. In addition, you cannot change an assignment group into an organizational group.
Are required. Users must belong to at least one organizational group.	Are optional. Users do not need to belong to assignment groups.
Can be viewed and managed by company administrators, administrators, and managers depending on how the groups are set up. The specific functions available depend on his or her role. For more information, see ***User Privileges by Role*** on page 22.	Can be viewed and managed by company administrators, administrators, and managers if they have the Assignment Group Access custom privilege. The specific functions available depend on his or her role. For more information, see Working with Assignment Groups.
Allow you to create users within them and move users between them.	Do not let you create users within them or move users between them. You can only **copy** users into

	assignment groups
Are always accessible.	Are only accessible if the feature has been enabled by a super administrator.

Working with Assignment Groups
Only super administrators can enable or disable the assignment groups feature as a whole.

If this feature is enabled, in order to see the assignment groups on your site, you *must* have the Assignment Group Access custom privilege. If you have this custom privilege, then the specific capabilities available to you for managing them depend on your role.

Company Administrators can:

- See all assignment groups on the site. Moreover, they can see all users within those groups.
- Manage all aspects of assignment groups. They can create, specify the members of, assign content to, delete, and report on assignment groups.

Administrators and Managers can:

- See all assignment groups on the site. However, within those assignments groups, they can only see the users that they have the privileges to see and manage, namely, the users in normal groups and advanced groups (or in one of their child groups) in which the administrator or manager is also a member.
- See a read-only view of the content assignments for all assignment groups.
- Add and remove users from assignment groups, but this capability is limited to the users that they have the privileges to see. They cannot perform any other operation on assignment groups.
- Select from all assignment groups on the site when running reports, but the report output is limited to that for the users that they have the privileges to see and manage.

Note: If your site has been configured to expose the Assignment Group Access custom privilege, by default the privilege is granted to company administrators but not to administrators or managers. As a result, if the privilege is *removed* from a company administrator or *granted* to an administrator or manager, the user's privileges are considered to be customized, and, therefore, a custom user icon is shown for the user. For images of the custom user icons, see Group and User Icons.

Create an Assignment Group
While only company administrators can create assignment groups, your site may be configured to allow administrators with other Skillport roles to copy users into them (see Working with Assignment Groups).

To create an assignment group

1. Click **Users & Groups > New Group** on the navigation bar.

   The New Group dialog box displays.

2. Enter the information for the new group. Be sure to select **Assignment** in **Group Type**. For help with this step, see ***Create a Group Manually*** on page 33.

Note: If **Assignment** is not an option in **Group Type**, verify that your Skillsoft representative has enabled the feature. In addition, note that users cannot add themselves to assignment groups during self-registration. As a result, once you select **Assignment** in **Group Type**, the **Display on Registration Page** check box is disabled.

3. Click **Save**.

   You cannot create a user within an assignment group or move a user to an assignment group. However, you can *copy* existing users to assignment groups; the users must already exist and must remain members of an organizational group. You can copy users to multiple assignment groups.

4. Populate the new assignment group with users by copying existing users into the new group. For information on how to copy users into a group, see ***Modify the Members of a Group*** on page 43.

Granting Access to Content

Entitlements vs. Assignments

What are Entitlements?

Entitlements are the assets a learner can access within Skillport. If a learner does not see an asset within his Skillport site (either in the Library or within a search), he is not entitled to it.

To entitle content, use the **Catalog Assignment** tab on the Users and Groups Management page. See Entitle Content for procedures.

What are Assignments?

Assignments are assets a learner is entitled to, that are placed in a learning plan. If a learner can see an asset within the Skillport Library, he is entitled to it and can save it to the **Personal Learning** tab of his learning plan.

To assign content, use the **Learning Plan Assignment** tab on the Users and Groups Management page. See Assign an Asset to a Learning Plan for procedures.

Entitling and Assigning Assets in Skillport

When a Manager, Admin or Company Admin within Skillport is entitled to an asset, he can assign it to himself, and he can assign it to someone in his hierarchical group. When he assigns the asset to another user, he grants that learner access to the content, but the learner will not see the asset in the Library (or within a search) unless the admin specifically entitles it to the learner.

Java-Free and Java-Dependent Content

If your site supports Java-free content, SkillPort Administrator uses icons to differentiate Java-dependent content from Java-free content (for example, and). Admins can use this functionality to make decisions about whether or not to assign Java-dependent content to learners. This configuration can be applied at the Site or Advanced Group level.

Content Icons

Java-dependent content icons are visible on the following Skillport Administrator pages:

- Users & Groups
  - User Management (Catalog Assignment, Learning Plan Assignment, Enrollments and Waivers)
  - Enrollment & Waivers
- Content
  - Library
  - Learning Programs
  - Credentials
  - Keywords > Link Keyword

- Reports
- License Manager
- Configuration > Completion Criteria

Availability to Learners

Depending on Java-free configuration settings, Java-dependent content is available to learners as follows:

- All Java-dependent content is hidden when learners browse the library and search for content. **Exception:** *Java-dependent content has already been assigned to the learner*.

  Note: To allow learners to complete previously-assigned or accessed content, pre-existing assignments, assets with learner transcript entries, learning program assignments, and bookmarks are not affected by the Java-Free configuration settings.

- Job Aids and SkillBriefs associated with Java-dependent content are still available in the Library and via Search, even when the content itself is not available.
- Java-dependent content is visible to Admins, and may still be assigned and included in a Learning Program.
- If Java content is hidden, learners can still view previously-accessed Java-dependent content in their learning plan and learner transcript.
- If Java-dependent content is republished and SkillPort determines that the content is no longer Java-dependent, the content automatically displays to learners.

For more information, see ***Skillport Content Java-Free Status*** in the Skillsoft Support Knowledge Base.

Working with Entitlements

An entitlement is a collection of content a learner is granted permission to access within the Skillport Library. If a learner does not have entitlements to certain assets, the learner does not see those assets when browsing the Library or searching for assets.

Modify Books24x7 Collection Entitlements

Entitling Books24x7 collections to users and groups makes those collections available to them. You can assign (place within the learning plan) specific books or individual book chapters to:

- Groups
- Advanced groups
- Assignment groups
- Individual users

You can directly entitle Books24x7 collections to all top-level groups and sub-groups as needed. If you assign a collection to a group, it is inherited by all members of the group and all members of all child groups.

Note: Directly assigning collections to a user or child group overrides all inherited assignments for that user or group. For this reason, when you make direct assignments, be sure to assign all of the intended collections. To restore the inherited assignments, you must change the assignment to INHERITED (as described below), which automatically removes all direct assignments.

To modify the Books24x7 collection entitlements for a group or user

1. In Skillport Administrator, click **Users and Groups** > **User Management** from the top navigation bar.

   The User Management page displays.

2. In the left panel, find the group or find the user whose assignments you want to modify, and select the group or user.

3. In the right panel, click **Books24x7 Assignment**.

   The entitled collections display. By default, individual users inherit their group's Books24x7 collection.

4. If you want to change the Books24x7 entitlements for a user or group, do the following:

   a. Click **Edit Group Assignments** (if assignments have not yet been made to the group) or **Override Inherited Assignments** (if the group currently has assignments).

      The Books24x7 Assignment dialog box displays.

   b. Specify the collections to entitle:

- **The same as the parent group:** Gives user or group access to the same collections the parent group is currently entitled, and any additional collections that are subsequently added to (or removed from) the parent group assignment.
- **All collections:** Gives user or group access to all collections currently available in your organization's Books24x7 subscription, and all additional collections that are subsequently added to or removed from the subscription.
- **No collections:** Removes the user or group access to your organization's Books24x7 subscription, and all additional collections that are subsequently added to or removed from the subscription.
- **Only the selected collections:** Give access to specific Books24x7 collections for the user or group. If you select this option and choose all currently-available collections in your organization's Books24x7 subscription, the user or group *will not* have access to any additional collections that are subsequently added to the subscription.

Note: The list of collections available for individual selection is determined first by your organization's Books24x7 subscription, and second by the collections that are assigned to the selected user's group or the selected group's parent group. Subscription information is available in the Books24x7 System Settings.

a. Click **Save**.

5. To modify overridden user or group entitlements, click **Edit Individual Assignments** and make your selections.

Inherited versus Explicit/Individual Assignments
You can make the following types of content assignments:

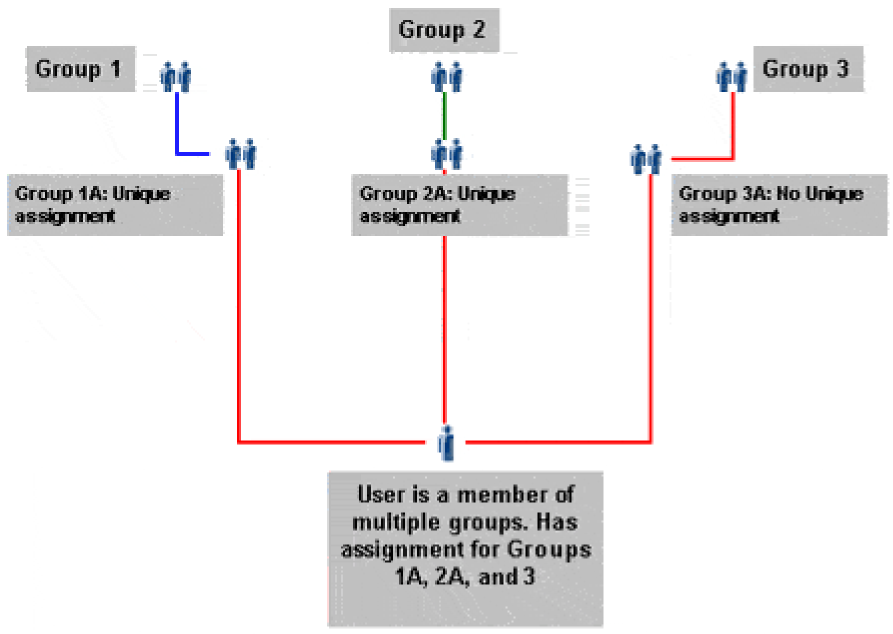
- **Catalog Assignments**: These assignments determine what learning assets are exposed to users and groups in the Library and using Search.
- **Learning Plan Assignments**: These assignments add learning assets to users' Learning Plan, which allows you or them to set goals, due dates, and reminders.
- **Enrollments and Waivers**: These assignments enroll users in learning programs. You can also grant waivers to individual courses within a program on a per user basis.
- **Books 24x7 Assignments**: These assignments determine what Books24x7 collections are exposed to users and groups.

Groups can be assigned content by inheriting it due to their membership in their parent group; these assignments are referred to as *inherited assignments*. They can also be assigned content directly; these assignments are referred to as *explicit assignments*.

Similarly, individual users can be assigned content by inheriting it due to their membership in a group; these assignments are referred to as *inherited assignments*. They can also be assigned content directly; these assignments are referred to as *individual assignments*.

Inherited Assignments

By default, any content assigned to a group is inherited by all users in that group and by any child groups. This enables administrators to assign specific content to a large number of users. Users in multiple groups inherit the assignments of all the groups in which they are a member.



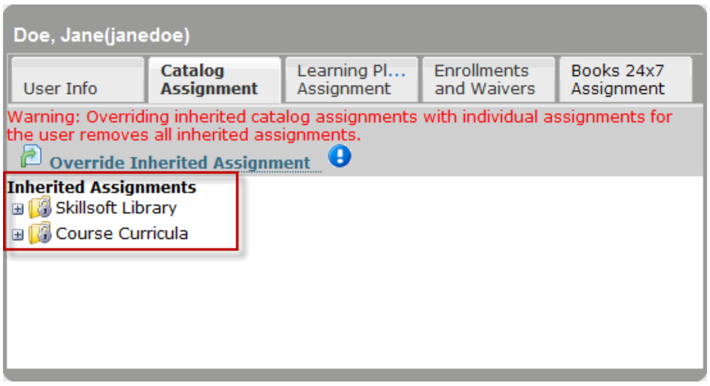
Explicit and Individual Assignments

In the case of Library assignments and Books24x7 assignments, if you assign content to a group or user directly, that assignment *overrides* all inherited assignments.

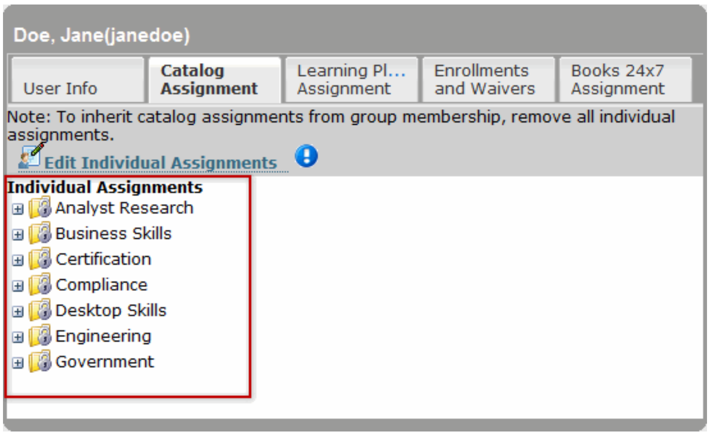
In the case of learning plan assignments and enrollments, learners can only remove content that they have assigned to themselves. This content is in the user's **Personal Learning** tab of the learning plan.

Entitle Content

When you entitle content to a group, that content becomes an individual user's **Inherited Assignment** on his **Catalog** tab in the User Management page. Example of Inherited (Group) Assignment



When you entitle a different set of content to a user (overriding the inherited assignments on his **Catalog** tab), that content becomes his **Individual Assignments**. Example of Individual Assignments



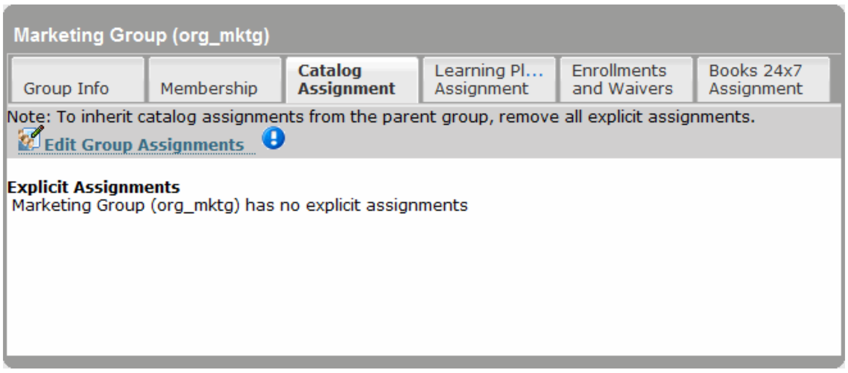
Note: The Library contains all stock and custom content installed on your Skillport site. You can organize this content into one or more libraries to optimize learner browsing and searching, and to facilitate the entitling and assigning of content.

To entitle an asset to a group (create Inherited Assignments)

Note: When you entitle content to a group, all members of the group see that content when browsing the Library and in their search results.

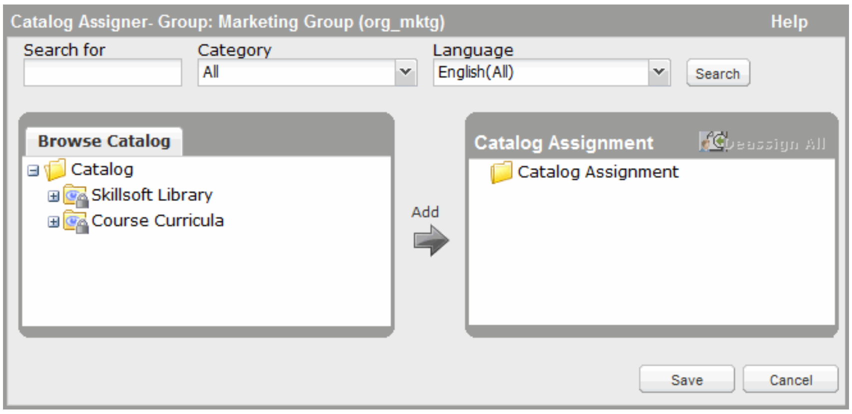
1. Click **Users & Groups > User Management** on the navigation bar.
2. In the left panel, select the group to which you want to entitle content.

3. In the right panel, click the **Catalog Assignment** tab.



4. Click **Edit Group Assignments**.

   The Catalog Assigner - Group dialog box displays:



Note: For more information about the folder icons, see Folder Icons.

5. To entitle the entire Catalog contents to a group, select all the folders in the **Catalog** top-level folder in the Browse Catalog pane and click **Add**, or drag the content to the right pane and drop it into the Catalog Assignment folder.

6. To entitle specific content to a group, browse or search the Catalog to find the content that you want to entitle and click **Add**, or drag the content to the right pane and drop it into the Catalog Assignment folder.

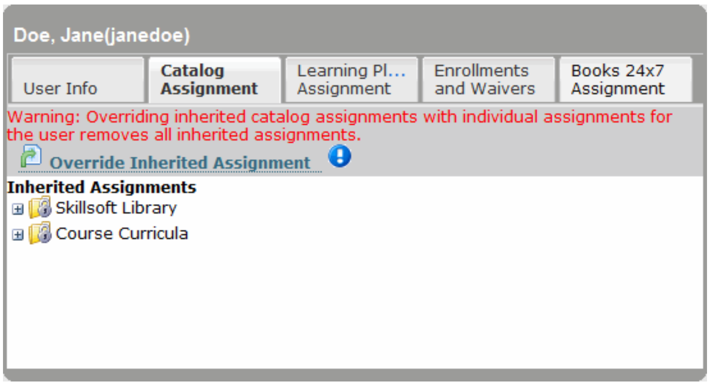
7. Click **Save**.

To entitle an asset to a user (create Individual Assignments)

1. Click **Users & Groups > User Management** on the navigation bar.

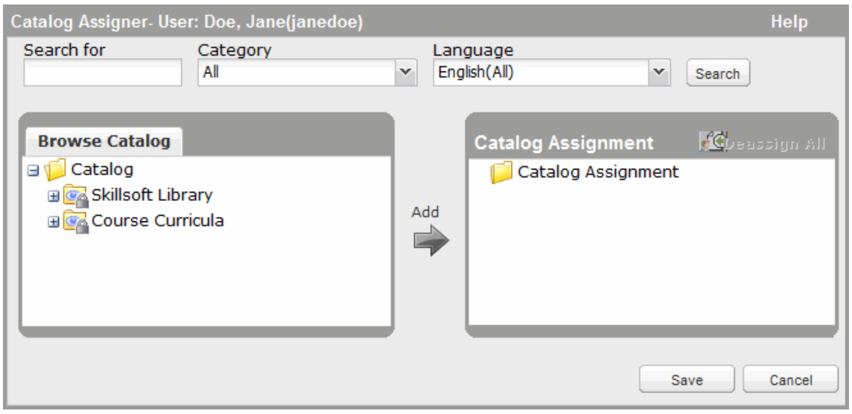
2. In the left panel, select the user to which you want to entitle content.

3. In the right panel, click the **Catalog Assignment** tab.



4. Click **Override Inherited Assignment**.

   The Catalog Assigner - User dialog box displays:



Note: For more information about the folder icons, see Folder Icons.

5. To entitle the entire Catalog contents to the user, select all the folders in the **Catalog** top-level folder in the Browse Catalog pane and click **Add**, or drag the content to the right pane and drop it into the Catalog Assignment folder.

6. To entitle specific content to a user, browse or search the Catalog to find the content that you want to entitle and click **Add**, or drag the content to the right pane and drop it into the Catalog Assignment folder.

Note: Ensure you add ALL the content to which you want the user entitled. Modifying a user's individual assignments removes the group entitlements, and only the content within the user's Catalog Assignment folder is available to him when he browses or searches the Library.

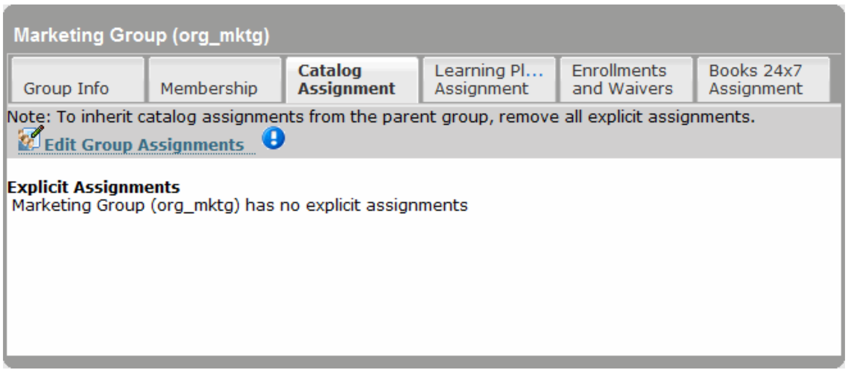
7. Click **Save**.

Remove Content Entitlements

To remove content entitlements for a group

Note: When you remove an entitlement from a group, all members of the group lose the entitlement. See Entitle Content to a User or Group if you want only specific users within the group to have entitlement to the content.

1. Click **Users & Groups > User Management** on the navigation bar.
2. In the left panel, select the group from which you want to remove the entitlement.
3. In the right panel, click the **Catalog Assignment** tab.



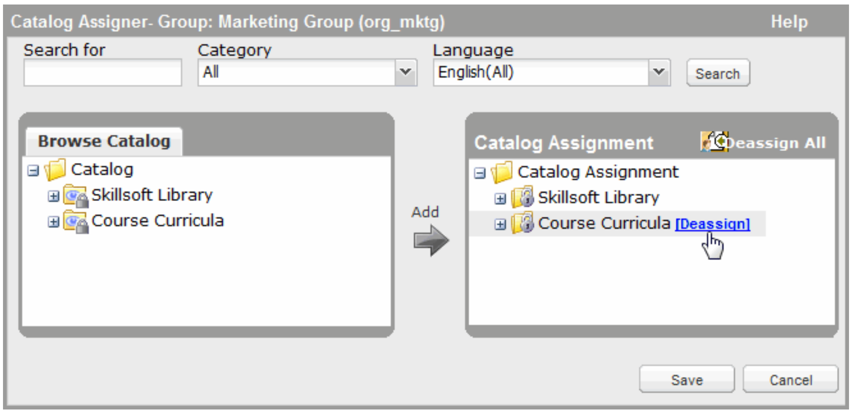
4. Click **Edit Group Assignments**.

   The Catalog Assigner - Group dialog box displays. See Folder Icons for more information about the folder icons.

5. In the Catalog Assignment folder in the right pane, locate the content for which you wish to remove entitlement.

Note: You can remove top-level folders only. If you wish to remove entitlements for specific folders, but leave entitlement intact for others within the same top-level folder, you must remove the top-level folder, then follow the T*o entitle an asset to a user (create Individual Assignments)* procedure in Entitle Content to a User or Group and assign just those folders to the user.

6. Hover your mouse over the folder and click the **Deassign** link that displays:



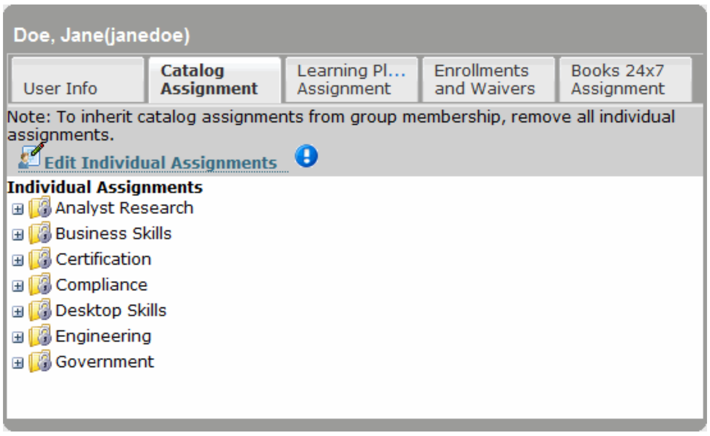
7. Click **OK** to close the confirmation message.
8. Click **Save**.

To remove content entitlements for a user

1. Click **Users & Groups > User Management** on the navigation bar.
2. In the left panel, select the user from which you want to remove the entitlement.

3. In the right panel, click the **Catalog Assignment** tab.

   The user's entitlements display:

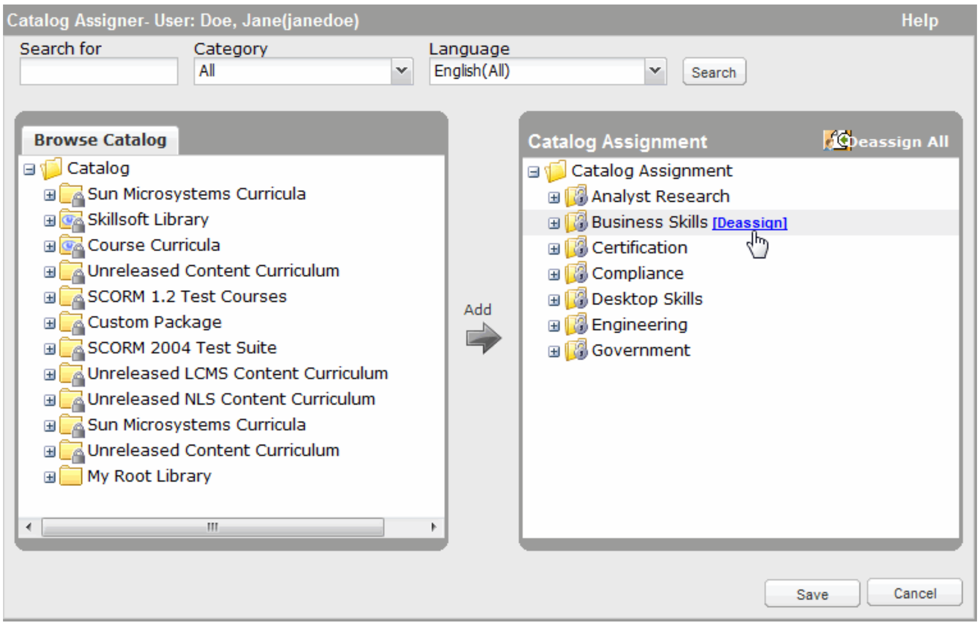


4. Click **Override Inherited Assignments** (if the user does not have individual assigments) or **Edit Individual Assignments** (if the user has individual assignments, such as in the image, above).

   The Catalog Assigner - User dialog box displays. See Folder Icons for more information about the folder icons.

5. In the Catalog Assignment folder in the right pane, locate the content for which you wish to remove entitlement.

6. Hover your mouse over the content and click the **Deassign** link that displays:



7. Alternatively, to remove entitlements for all assignments, click **Deassign All**.

8. Click **OK** to close the confirmation message.

9. Click **Save**.

Working with Assignments

For details about the different learning assets Skillsoft offers, see Types of Learning Assets.

Asset Type/Subtype Map

The following table lists the primary content types and sub-types that learners will see when searching and/or filtering search results in the Skillport Library.

Content Types (formerly Content Bins)	Content Sub-Type (formerly Asset Type)
Courses	▪ Assessments ▪ Courses ▪ Course Topics * ▪ Learning Programs ▪ Live Learning Courses ▪ Live Learning Expert Live class ** ▪ Live Learning Expert Encore (recorded classroom) ** ▪ Live Learning Hands-On Labs ** ▪ Live Learning Module Pre-Test ** ▪ Live Learning Module Post-Test ** ▪ Live Learning ▪ Simulations
Books	▪ Audio Books ▪ Blueprints ▪ Books ▪ Book Sections * ▪ Journals ▪ Newsletters ▪ Recorded Sessions ▪ Reports ▪ Summaries
Videos	▪ Live Events ▪ Videos

Instructor Led Training (ILT)	▪ Dialogue Live ▪ ILT Courses
Resources	▪ Business Impact ▪ Challenges ▪ Express Guides ▪ Job Aids ▪ Learning Sparks ▪ Live Learning ▪ Live Learning Class Notes ** ▪ Live Learning Mentoring ** ▪ Live Learning Student Guide: Slides ** ▪ Mentoring ▪ Practice Labs ▪ Projects ▪ SkillBriefs
Portals	▪ Business Exploration Series ▪ KnowledgeCenters ▪ Skillsoft Advantage
Custom (courses, passive objects, custom content published by your organization)	▪ External Learning Object (ELO) ▪ Custom ***

***** - Course topics and book sections cannot have Community features, such as comments and recommendations. These are done at the parent level.

****** - This content item displays only in a Live Learning Course and is not browsable nor searchable on its own.

******* - All Custom types except for ELOs also have a "Custom" sub-type.

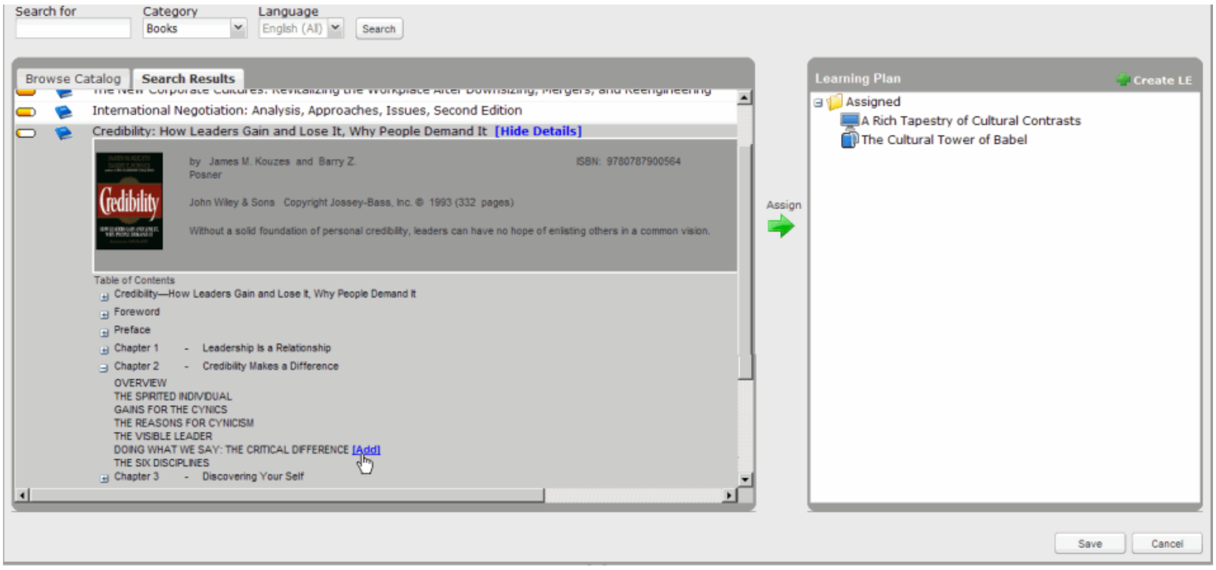
Digital Books vs. Print Books

Pages are rendered differently in digital books. Because the size of a page on screen can vary greatly from a traditional book page, Skillsoft uses the term "book section" to distinguish the sections of a chapter, instead of the traditional page number.

In the example below, the top-level is the book **title** (*Credibility: How Leaders Gain and Lose It, Why People Demand It*).

Next, the book's Table of Contents displays, showing the book **chapters** (*Chapter 1 - Leadership in a Relationship*). These are determined by the traditional format of the book in print format.

Finally, within the chapter are the book **sections** - grouping of text as determined by the publisher (*DOING WHAT WE SAY: THE CRITICAL DIFFERENCE*). This helps the reader hone in on areas of chapters that are most beneficial to his or her particular learning needs. You can add these sections to a learning plan.



Note: Only Skillport Administrators can add Book sections to a learning plan.

Custom Content

Administrators and managers can create custom content.

- Administrators can assign curricula to any group or user.
- However, managers can assign content only to groups and users below them in the group hierarchy.

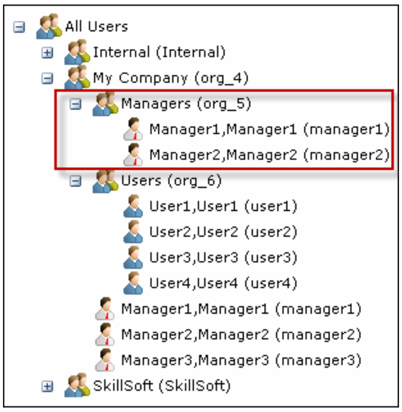
Before creating custom content using the Library page, there must be a location already in place for it; this location **must** be subordinate to the `All Curricula` folder. Contact your Skillsoft representative to set up this location.

Depending on the needs of your organization, you can assign these areas to a group or individual users.

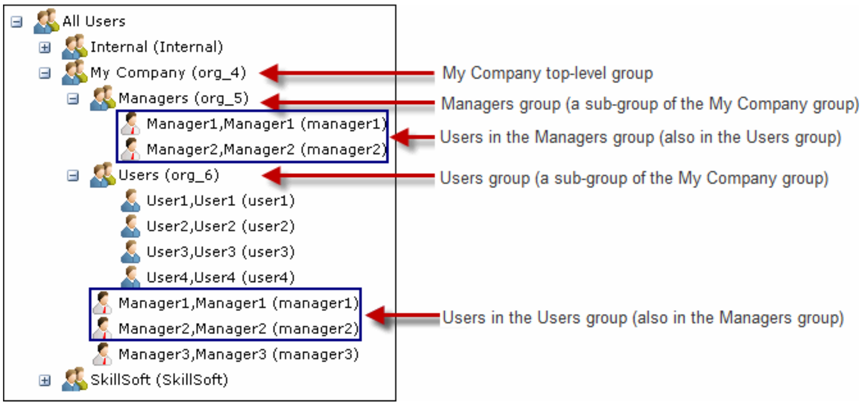
Example: Assign a Custom Content Area to a Group

1. You log in as an administrator, and you create a new user group called *Managers*.

2. You add the users **Manager1** and **Manager2** to the new *Managers* group, as shown in the following image:

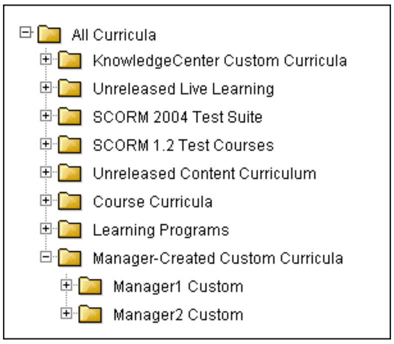


Manager1 and Manager2 now have multiple group assignments (they are both in the *Managers* group and the *Users* group). In order for them to assign content to the Users group (or to the individual members of that group), they must be a part of the *My Company* group because managers can only assign content to managers and other users who are below them in the organizational hierarchy:



In order to create custom content, Manager1 and Manager2 must also be a part of the Managers group. This allows them to assign (expose) content to the Managers group that you do not expose to the Users group.

3. Use the Library page to create a custom content area for managers. This is a folder that is referred to in the user interface as a curricula "group." Within the custom area, you also create separate areas for Manager1 and Manager2, as shown in the following image.



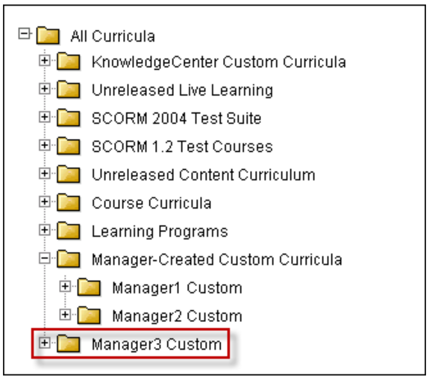
4. On the **User and Group Management** page, assign the Manager-Created Custom Curricula folder to the Manager group. This has two effects in the Skillport Administrator:

- It exposes the folder in the Library to all members of the Manager group (in this case, Manager1 and Manager2).
- It exposes the folder on the **Catalog Assignment** tab of the User and Group Management page, which means all members of the Manager group can assign the content (including the content in its subfolders) to users.

Example: Assign a Custom Content Area to an Individual User

If privacy is a concern, you can use the Library Manager to create a custom content folder under `All Curricula` for each individual manager and expose each folder to only the appropriate manager by assigning it to only that manager.

For example, building upon the first example, the following image shows an additional custom curricula folder named `Manager3 Custom`. This folder lives outside of the `Manager-Created Custom Curricula` folder:



If you assigned the `Manager3 Custom` folder to just Manager3, the folder would be visible to only Manager3. As a result, while Manager1 and Manager2 could see the contents of each other's custom content folders, they could not see the contents of Manager3's custom content folder, nor could Manager3 see the contents of theirs.

Assign or Deassign Assets in the Library

Assigning content (including learning programs and Live Learning courses) to users and groups makes it available within the Library and search to those specific users. You can assign content to:

- Groups
- Advanced groups
- Assignment groups
- Individual users

If you assign content to a group, it is inherited by all members of the group and all members of all child groups.

Note: Be aware that directly assigning content to a group or user overrides all inherited assignments from that group or user. For this reason, when you make direct assignments, be sure to assign all of the intended content. To restore the inherited assignments, you must manually remove all direct assignments.

You can also deassign content that you have directly assigned to a group or user. However, you cannot deassign inherited content. To remove inherited assignments, deassign the content from the group to which it was directly assigned.

To assign or deassign content to a group or user

1. Click **Users & Groups > User Management** on the navigation bar.

   The User Management page displays.

2. In the left panel, find the group or find the user whose assignments you want to modify, and select that group or user.

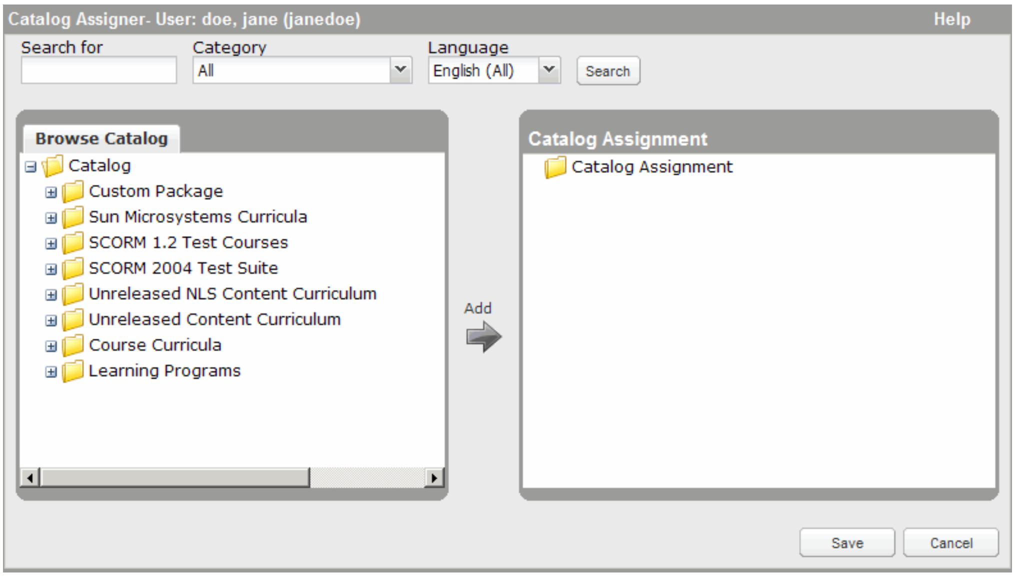
3. In the right panel, click the **Catalog Assignment** tab.

   The content assigned to the selected user or group displays.

4. If the assignments are inherited, you can override the assignments.

   a. Click **Override Inherited Assignment**.

   The Catalog Assigner opens with the available content for assignment displayed:



   b. Browse or search the available content to find the asset(s) you want to assign.

   c. Select the asset that you want to assign. To select multiple assets, use the standard keyboard shortcuts (CTRL+click and SHIFT+click).

   d. Click **Add**.

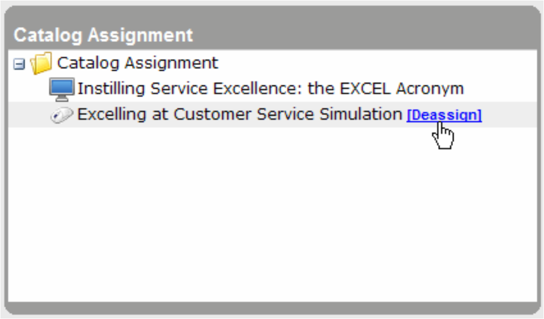
   e. Click **Save**.

5. If the assignments are explicit (directly assigned to the selected group) or individual (directly assigned to the selected user), and you want to **remove** one or more assignments:

   a. Click **Edit Individual Assignments**.

   b. Hover your mouse over the assignment.

c. Click the **Deassign** link that displays:



d. Click **OK**.

Note: If you remove all explicit (direct) assignments from a group, the assignments inherited from the parent group are restored. If you remove all individual (direct) assignments from a user, the assignments inherited due to membership in one or more groups are restored.

Managing Assets in Learning Plans
You can manage assigned assets for:

- Individual users
- Groups
- Advanced groups
- Assignment groups

When you add an asset to a learning plan, it displays in the learner's **Assigned Learning** tab in his learning plan. Before adding assets to a learning plan, note the following:

- When you assign an asset to a group, all group and sub-group members inherit that asset.
- When you assign an asset that a learner has already assigned to himself, the asset is moved from the learner's **Personal Learning** tab to the **Assigned Learning** tab within his learning plan. All progress is retained.
- When a learner inherits an asset in his learning plan (for example, from a group assignment) but also has the same asset assigned to him (by an administrator), the asset displays twice in the learning plan.
- Adding a learning program or Live Learning Course (LLC) to a learning plan for a group or individual learner does not automatically enroll the group or learner. You must enroll the group or learner as a separate, explicit action. Alternatively, each learner can withdraw himself.

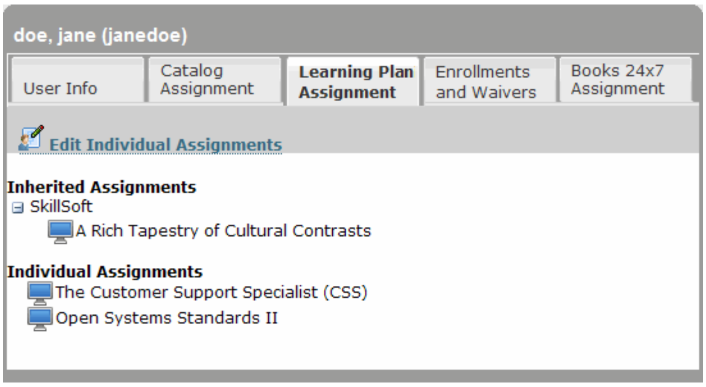
Assign an Asset to a Learning Plan

Note: If your organization has enabled Skillport's recurrence feature, use the *To add a recurring asset to the learning plan for a group or user* drop-down.

To add an asset to the learning plan for a group or user

1. Click **Users & Groups > User Management** on the navigation bar.
2. In the left panel, find the group or find the user whose assignments you want to modify, and select that group or user.
3. In the right panel, click the **Learning Plan Assignment** tab.

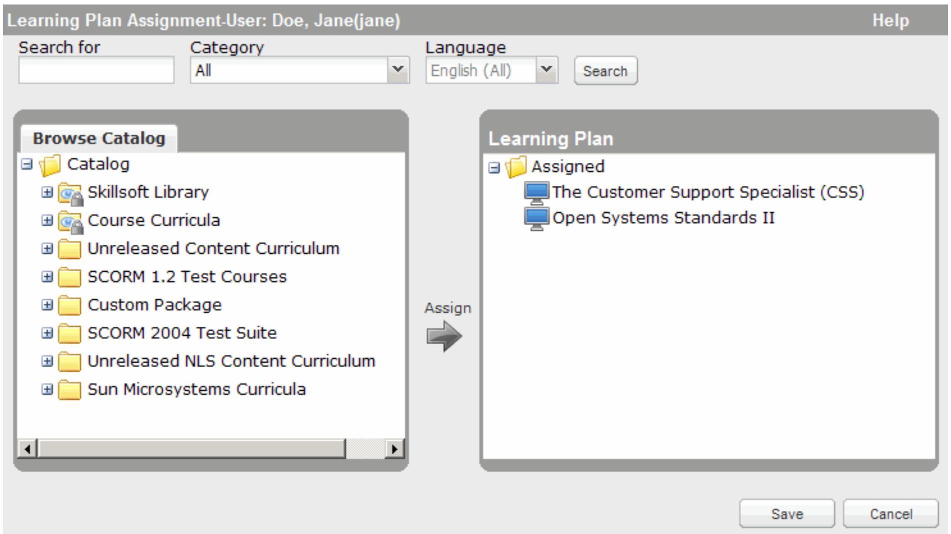
   All Learning Plan assignments for the user or group display:

Note: While you can browse the inherited Learning Plan assignments for the user or group, to modify these, you must modify the assignments of the parent group.

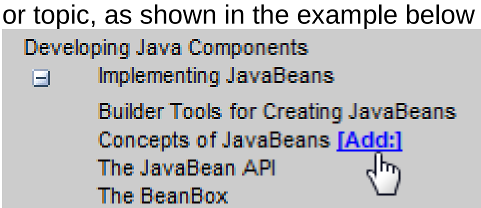
4. Do one of the following:
   - If you have selected a user, click **Edit Individual Assignments**.
   - If you have selected a group, click **Edit Group Assignments**.

   The Learning Plan Assigner page displays.

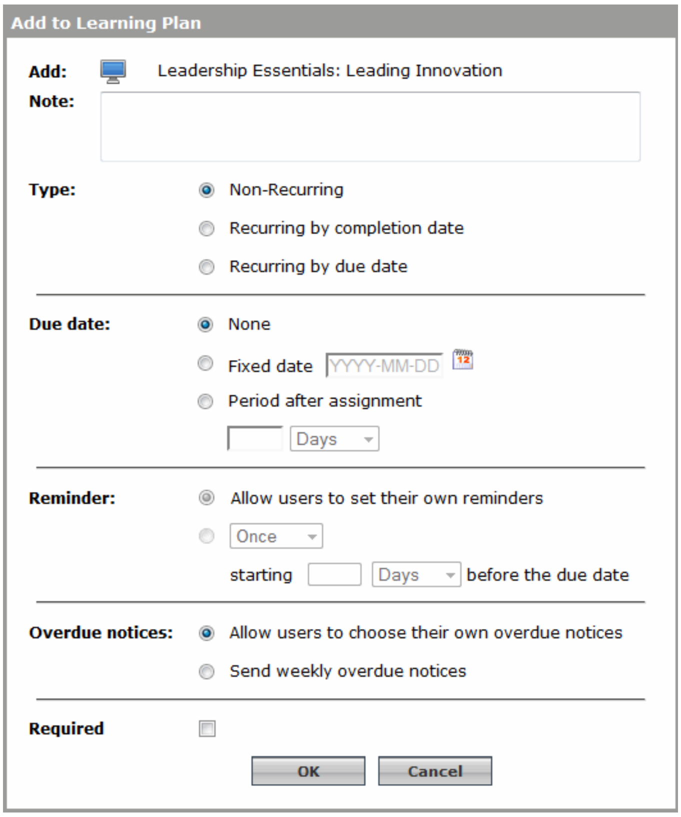


5. Browse or search the library to find the learning asset that you want to add, and select it.
6. Click , or drag the asset to the right pane and drop it into the Assigned folder.

Note: To add a specific *section* of a book or a specific *topic* in a course, you must move your mouse over the asset's title, and then click the **Show Details** link that displays. Next, click to expand the relevant chapter or lesson, and click the **Add** link that appears beside the section or topic, as shown in the example below for a section.



The Add to Learning Plan dialog box displays.



Depending on the configuration of your site, one or more of the settings shown in the image above might not be available.

7. If the option exists, select **Non-recurring**.
8. Enter a **Note** (for example, the objective of the learning asset) up to 100 characters.
9. Select a **Due Date**.
   - **Fixed date** is a date you select from the calendar.
   - **Period after assignment** is the number of days, weeks or years from the date you assign the asset to the user.
10. Select the type of **Reminder**.
    - Select **Allow users to choose their own overdue notices** to have the user set his own reminder.
    - Select a one-time or recurring email to be sent to the user automatically.

Note: If you set a reminder, you must also enter the number of days before the asset's due date to send the initial or one-time reminder email. The reminder e-mail contains direct links to the asset itself and to its details page.

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11. Optionally, select ☑ **Overdue notices** to send weekly email reminders if the asset is not completed by the specified Due Date.
12. If applicable, select ☑ **Required**.

Note: This setting does not affect the behavior of application; it is used for reporting. It differentiates required assets from optional ones.

13. Click **OK**. The asset displays in the user's Development Plan set in the **Assigned Learning** tab in his learning plan, and is automatically in an approved state.

14. Click **Save**.

15. If your site is configured to do so, the Preview Email Template dialog box displays, where you can send an email about the assignment:

    a. If desired, enter a personal message in any language at the top of the body of the email, and click **Send**. You can enter a maximum of 1,024 characters. Click **Don't Send** if you do not want to send the email.

    b. In the case of a group assignment, click **Send** again in the confirmation window that displays to confirm the action.

To add a recurring asset to the learning plan for a group or user

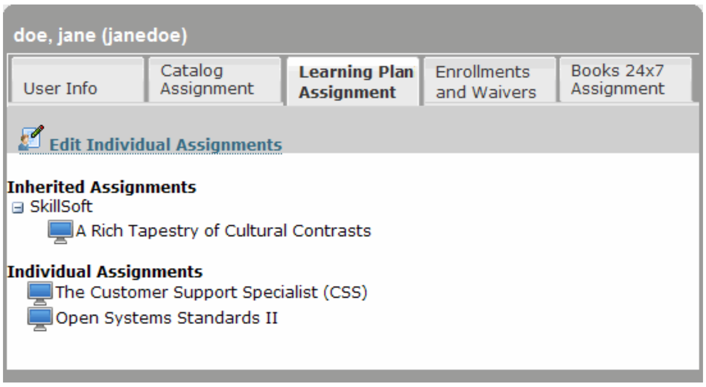
Note: The types of assets you can restart include courses, test preps, SkillSims, custom content, practice labs, and recorded Dialogue sessions. For more information, see Compliance.

1. Click **Users & Groups > User Management** on the navigation bar.

2. In the left panel, find the group or find the user whose assignments you want to modify, and select that group or user.

3. In the right panel, click the **Learning Plan Assignment** tab.

   All assignments for the user or group display:



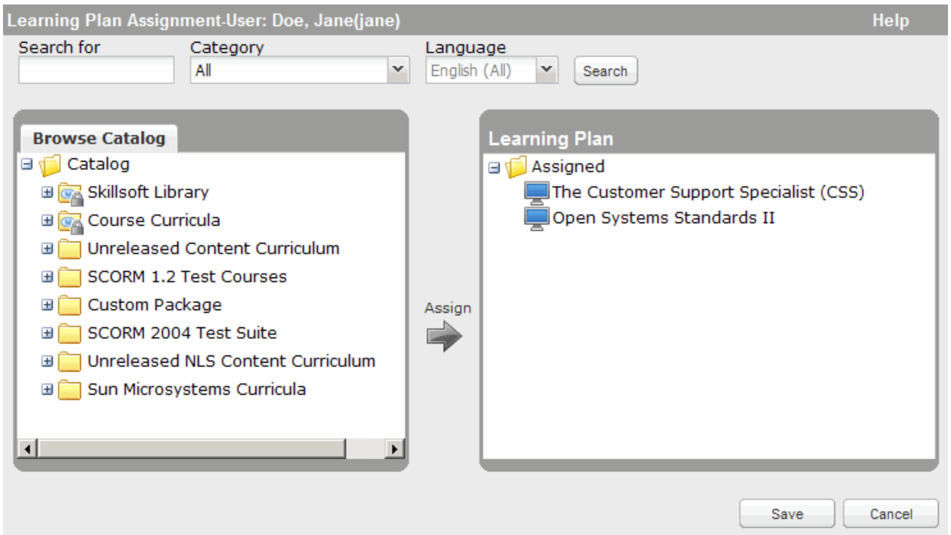
Note: While you can browse the inherited learning plan assignments for the user or group, to modify these, you must modify the learning plan assignments of the parent group.

4. Do one of the following:

   - If you have selected a user, click **Edit Individual Assignments**.

   - If you have selected a group, click **Edit Group Assignments**.

The Learning Plan Assigner page displays.



5. Browse or search the library to find the learning asset that you want to add, and select it. You can also add a specific book section or course topic to the Assigned folder.

6. Move your mouse over the asset title.

   A **Show Details** link displays.

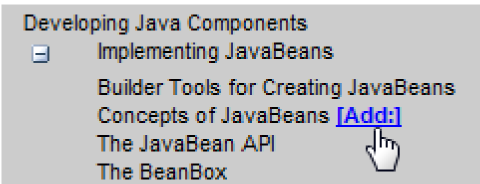
7. Click **Show Details**.

8. Click ⊞ to expand the relevant book chapter or course lesson.

   A list of the book sections or course topics display.

9. Hover your mouse over the book section or course topic you want to add to the Assigned folder.

   An **Add** link displays:

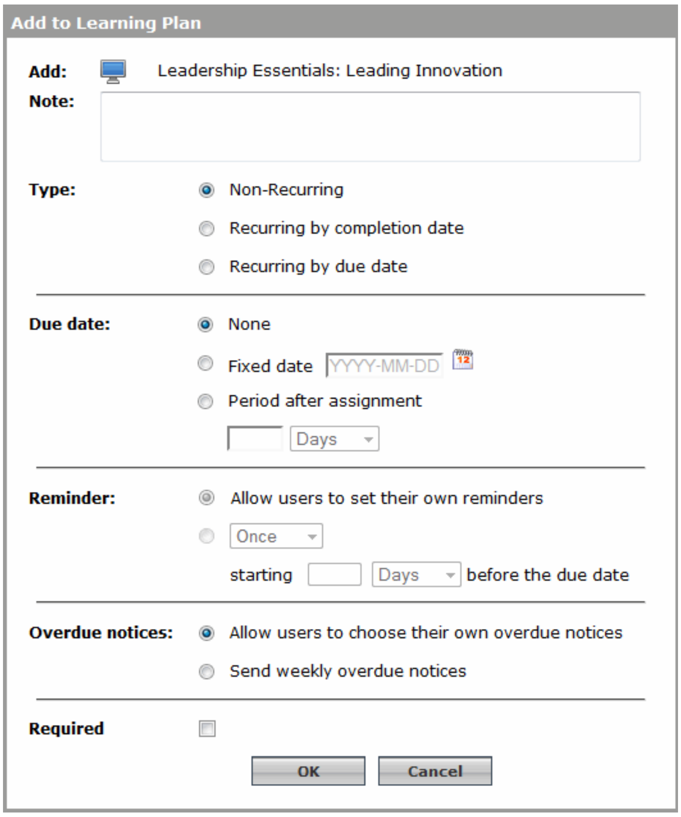


10. Click **Add**.

    The Add to Learning Plan dialog box displays.

11. Click , or drag the asset to the right pane and drop it into the Assigned folder.

The Add to Learning Plan dialog box displays.



Note: Depending on the configuration of your site, one or more of the settings shown in the image above might not be available.

12. Enter a **Note** (for example, the objective of the content) up to 100 characters.

13. Select the **Type** of content.

    - Non-recurring content (see *To add an asset to the learning plan for a group or user,* above)

    - Recurring by completion date

a Select ⊙ **Recurring by completion date**.

b Enter the **Initial Due Date**.

This date is the first time the assigned content will be due for completion. Enter a numeric value and select **Days**, **Weeks** or **Years** from the drop-down list. (For example, if you assign an asset on May 1, and enter the **Initial Due Date** as **30 Days**, the assignment is due on May 31.)

c Enter the **Recurrence**.

This becomes the date from which the reassignment value is based. Enter a numeric value and select **Days**, **Weeks** or **Years** from the drop-down list. For example, if you set the **Recurring Due Date** to May 1, 2014 and the user completes the asset on February 1, 2014 (earlier than expected), the next due date remains May 1, 2015.

d Set the **Open window**.

The time frame set here determines when the user can access the content. If, for example, a course repeats yearly, you may not want a user to take the course on December 31, 2014 and again on January 1, 2015 to fulfill the requirement. The Open Window option allows you to specify when you want the course available to the user for training.

e For the **Reminder**, select one of the following:

- **Allow users to set their own reminders**
- **Set your reminder:** Select the frequency from the drop-down list and enter a number of days, weeks or months prior to the due date to send the reminder. (For example, a **Daily** reminder set for **5 Days** before the due date.)

Note: If you set a reminder, users cannot change it. However, if you allow users to set their own reminders, you can override them with a reminder that you set (which also cannot be changed by users).

f For **Overdue notices**, select one of the following:

- **Allow users to choose their own overdue notices**
- **Send weekly overdue notices:** The system sends an email the day after the due date and every 7 days thereafter until the user completes the course. The Overdue notices setting is not available if you are adding a series from the Library, because the series will contain multiple courses that may be in varying stages of completion.

g If applicable, select ☑ **Required**.

Note: This setting does not affect the behavior of application; it is used for reporting. It differentiates required assets from optional ones.

h Click **OK**. The Add to Learning Plan dialog box closes and the content displays in the **Assigned Learning** tab in the learning plan. If the content is for the Development Set, it displays in that set within the tab.

- Recurring by due date

i Select ◉ **Recurring by due date**.

j Enter the **Initial Due Date**.

This date is the first time the assigned content will be due for completion. Enter a numeric value and select **Days**, **Weeks** or **Years** from the drop-down list. (For example, if you assign content on May 1, and enter the **Initial Due Date** as **30 Days**, the assignment is due on May 31.)

k Enter the **Recurrence**.

Reassign every x Days/Weeks/Years based on recurring due date: Enter the number of days, weeks or years when you want this assignment to reassign (reappear) in the user's learning plan. Enter a numeric value and select **Days**, **Weeks** or **Years** from the drop-down list.

Recurring Due Date: This becomes the date from which the reassignment value is based. Enter a numeric value and select **Days**, **Weeks** or **Years** from the drop-down list. For example, if you set the **Recurring Due Date** to May 1, 2014 and the user completes the asset on February 1, 2014 (earlier than expected), the next due date remains May 1, 2015.

Note: For example, on May 1, 2014, you set the **Initial Due Date** to 30 days after the assignment, making the asset due on May 31, 2014. If the **Recurring Due Date** is set to May 31, 2015 (because you want the user to take the course every year), and you set the **Reassign every...** field to **180 Days**, then the content displays in the learning plan on November 27, 2014 and the next time the content is due is the date set in the **Recurring Due Date** field.

l Set the **Open window**.

The time frame set here determines when the user can access the content. If, for example, a course repeats yearly, you may not want a user to take the course on December 31, 2014 and again on January 1, 2015 to fulfill the requirement. The Open Window option allows you to specify when you want the course available to the user for training.

m For the **Reminder**, select one of the following:

- **Allow users to set their own reminders**
- **Set your reminder:** Select the frequency from the drop-down list and enter a number of days, weeks or months prior to the due date to send the reminder. (For example, a **Daily** reminder set for **5 Days** before the due date.)

Note: If you set a reminder, users cannot change it. However, if you allow users to set their own reminders, you can override them with a reminder that you set (which also cannot be changed by the user).

n For **Overdue notices**, select one of the following:

- **Allow users to choose their own overdue notices**
- **Send weekly overdue notices:** The system sends an email the day after the due date and every 7 days thereafter until the user completes the course. Note that the Overdue notices setting is only available if you are assigning an *individual course* to a learning plan (and for no other type of content). It is not available if you are adding a curriculum folder of courses since the folder will contain multiple courses that may be in varying stages of completion.

Note: If the content is a *course*, for **Overdue notices**, select one of the following:
- users can choose whether to receive overdue notices by email, or
- overdue notices should be sent (and users should not be given the choice to receive these notices)

o Click **OK**. The Add to Learning Plan window closes and the content displays in the user's learning plan. If the content is for the Development Set, it displays in that set within the tab.

14. Click **OK**.
15. Click **Save**.
16. If your site is configured to do so, the Preview Email Template dialog box displays, where you can send an email about the assignment:
    a. If desired, enter a personal message in any language at the top of the body of the email, and click **Send**. You can enter a maximum of 1,024 characters. Click **Don't Send** if you do not want to send the email.
    b. In the case of a group assignment, click **Send** again in the confirmation window that displays to confirm the action.

Remove an Asset from a User's Learning Plan

Note: Removing a learning program or Live Learning Course (LLC) from a learning plan does not withdraw the learner from it. For information about withdrawing a learner, see Withdraw Users or Groups.

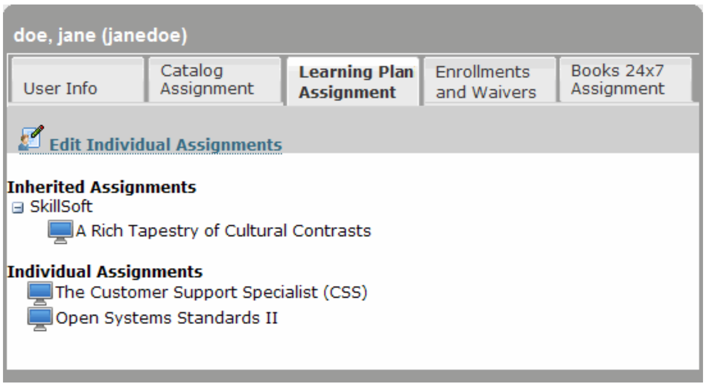
To remove an asset from the learning plan for a group or user

1. Click **Users & Groups > User Management** on the navigation bar.

2. In the left panel, find the group or find the user whose assignments you want to modify, and select that group or user.

3. In the right panel, click the **Learning Plan Assignment** tab.

   The current assignments display:

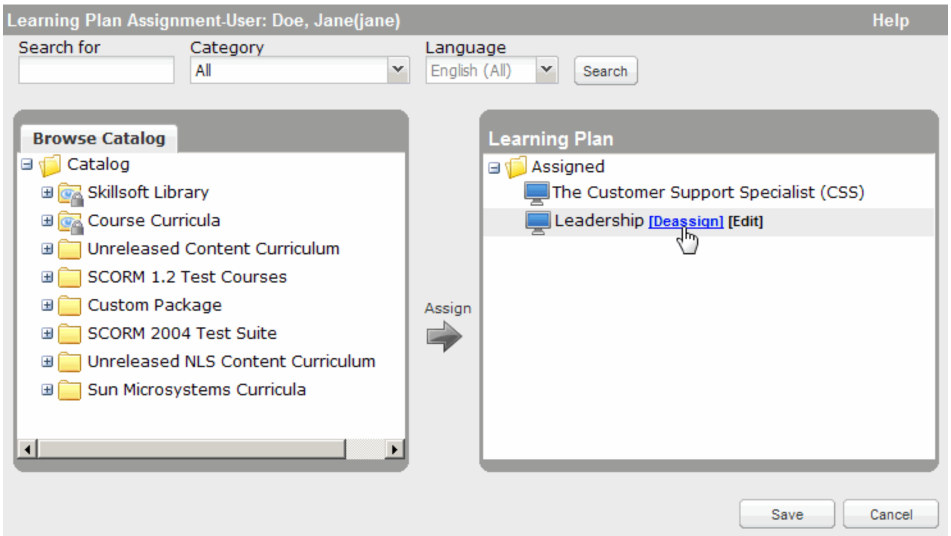
   

   Note: While you can browse the inherited learning plan assignments for the user or group, to modify these, you must modify the assignments of the parent group.

4. Do one of the following:

   - If you have selected a user, click **Edit Individual Assignments**.
   - If you have selected a group, click **Edit Group Assignments**.

5. In the right pane, move the cursor over the asset in the displayed list, and click the **Deassign** link that displays:



6. Click **OK**, and then click **Save**.

7. If your site is configured to do so, the Preview Email Template dialog box displays, where you can send an email about the assignment:

   a. If desired, enter a personal message in any language at the top of the body of the email, and click **Send**. You can enter a maximum of 1,024 characters. Click **Don't Send** if you do not want to send the email.

   b. In the case of a group assignment, click **Send** again in the confirmation window that displays to confirm the action.

Create and Assign a Learning Event in the Learning Plan

You can use a learning event to track training completed outside of the Skillport LMS, such as a conference, training course, or webinar. You must create the learning event at the same time you assign it to a user or group.

To assign a learning event to an individual learner's learning plan

1. In Skillport Administrator, click **Users and Groups** > **User Management** from the top navigation bar.

   The User Management page displays.

2. In the Users and Groups pane, navigate to the learner name.

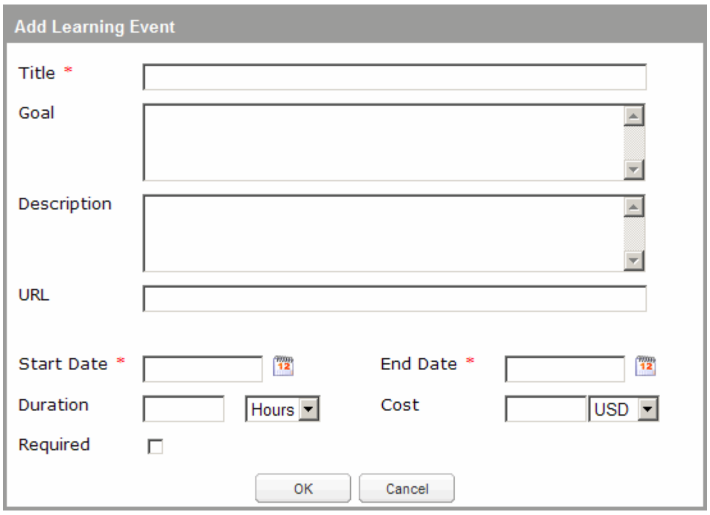
3. In the right pane, click the **Learning Plan Assignment** tab.

4. Click **Edit Individual Assignments**.

   The Learning Plan Assigner dialog box displays.

5. At the top right of the Learning Plan Assigner dialog box, click **Create LE**.

The Add Learning Event dialog box displays:



6. Enter the **Title**, **Start Date** and **End Date**.

7. Optionally, enter a **Goal** (up to 100 characters), **Description**, **URL**, the **Duration** (in **Hours** or **Days**), and the **Cost**.

8. If asset completion is required, select **Required**.

   Note: This setting has no impact on the system's behavior; it is an attribute that displays in generated reports.

9. Click **OK**.

   The learning event displays in the **Assigned Learning** tab of the user's learning plan.

To assign a learning event to a group's learning plan

1. In Skillport Administrator, click **Users and Groups** > **User Management** from the top navigation bar.

   The User Management page displays.

2. In the Users and Groups pane, navigate to the group name.

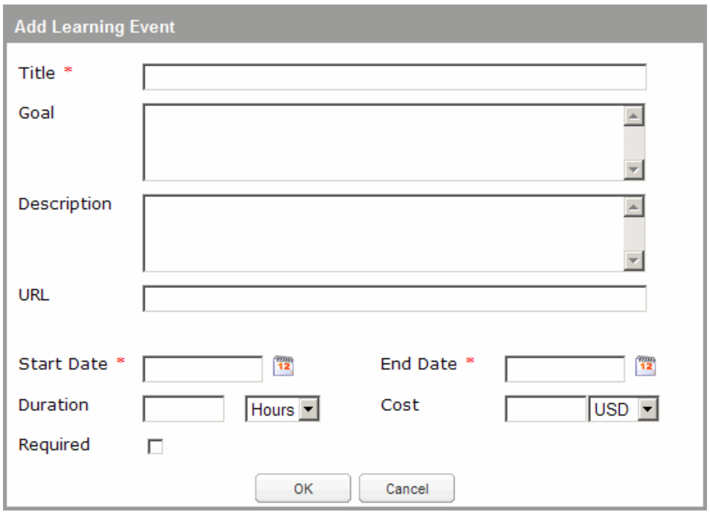
3. In the right pane, click the **Learning Plan Assignment** tab.

4. Click **Edit Group Assignments**.

   The Learning Plan Assigner dialog box displays.

5. At the top right of the Learning Plan Assigner dialog box, click **Create LE**.

The Add Learning Event dialog box displays:



6. Enter the **Title**, **Start Date** and **End Date**.

7. Optionally, enter a **Goal** (up to 100 characters), **Description**, **URL**, the **Duration** (in **Hours** or **Days**), and the **Cost**.

8. If asset completion is required, select **Required**.

Note: This setting has no impact on the system's behavior; it is an attribute that displays in generated reports.

9. Click **OK**.

   The learning event displays in the **Assigned Learning** tab of each group member's learning plan.

Managing Development Plan Sets

To use Development Plans in Skillport, your organization must enable this feature. Contact your Skillsoft representative to enable Development Plans.

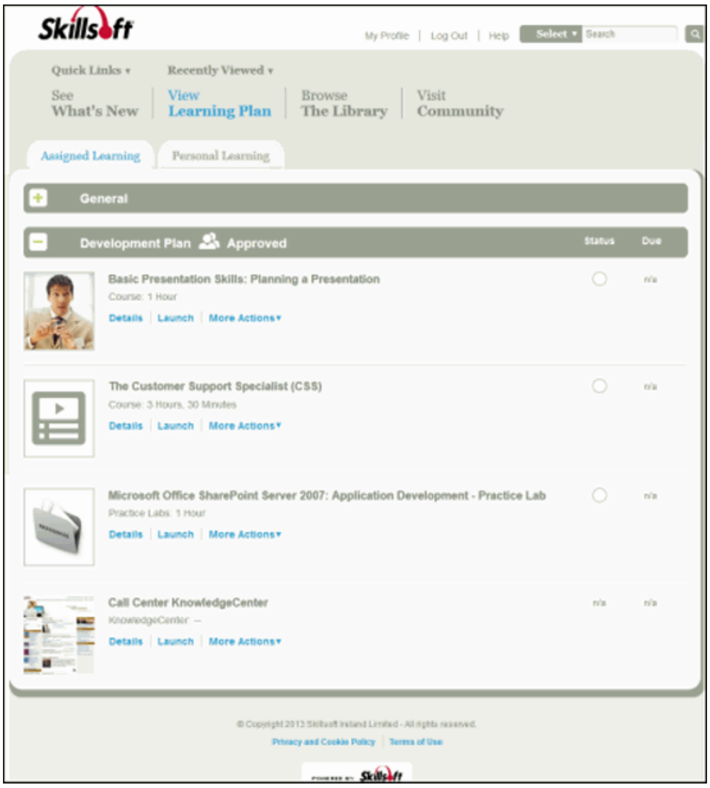
Development Plan Set

What is the Development Plan Set?

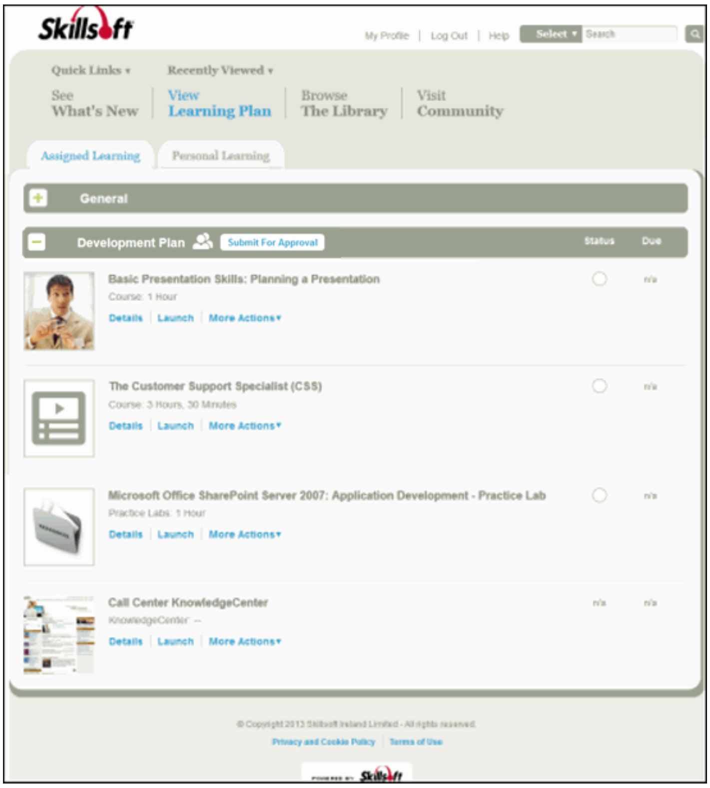
The Development Plan set is an area where both the learner and manager can collaboratively develop an approved, personalized development plan designed to achieve specific career development goals and keep track of assets.

Development Plan Approval State

The learner and his manager can add learning assets to the Development Plan set in the learning plan. When the learner's manager adds an asset to the Development Plan set, there is no submission required and the set displays as Approved.



Whenever the learner makes a change to the set, the Development Plan set title changes to display a Submit for Approval button.



- the learner submits the Development Plan for approval and the manager approves the assets. The Development Plan set then displays as **Approved**.
- the learner removes the new assets. The Development Plan set reverts back to the state it was in prior to any changes.

Approve or Deny a Development Plan Set

When a user adds an asset to the Development Plan folder, the folder is in a Pending state. The user can then click **Request Approval** to send the folder contents to the Approval Manager for review and approval or denial.

To review, approve or deny a Development Plan request

1. Click **Quick Links** > **Approval Manager** at the top of the page.

   The Approval Manager page displays:

2. Locate the pending request you want to approve or deny.

Note: Once you approve or deny a Development Plan, it cannot be undone. Be sure you select the correct request prior to continuing.

3. Click ✔✖ in the **Actions** column corresponding to the request.

   A dialog box displays that includes information about the selected request.

4. If applicable, review the learner's note.

Note: If a learner's note exceeds the space restraints in a window, an ellipsis (...) appears at the end of the viewable text. To see the learner's note in its entirety, hover your mouse over the ellipsis and the full text appears in a pop-up window.

5. In **Details**, view the contents of the request.

6. If applicable, enter notes to the learner.

7. Do one of the following:

   - Click **Approve** to approve the request.
   - Click **Deny** to deny the request.
   - Click **Cancel** to close the Request window without approving or denying the request.

   The status of the request displays on the Approval Manager page as either **Approved** or **Denied**. If you did not approve or deny the request, the status displays as **Pending**.

8. To view a summary of the request, click in the **Actions** column.

9. To view and print a report of the request, click in the **Actions** column. Or, click **Print Report** in the upper-right corner of the page.

Assign an Asset to Users' Development Plan Folders

Note: If your organization has enabled Skillport's recurrence feature, use the *To add a recurring asset to a Development Plan set for a group or user* drop-down.

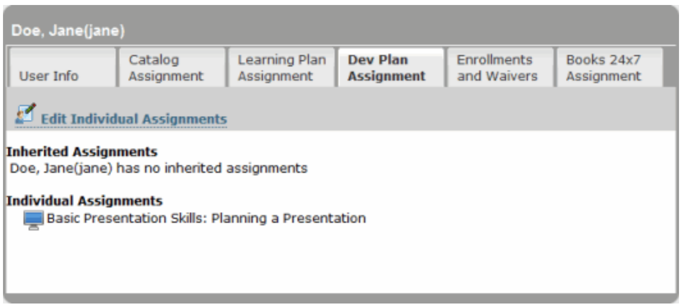
To add an asset to a Development Plan set for a group or user

1. Click **Users & Groups > User Management** on the navigation bar.

2. In the left panel, find the group or find the user whose assignments you want to modify, and select that group or user.

3. In the right panel, click the **Dev Plan Assignment** tab.

   All Development Plan assignments for the user or group display:

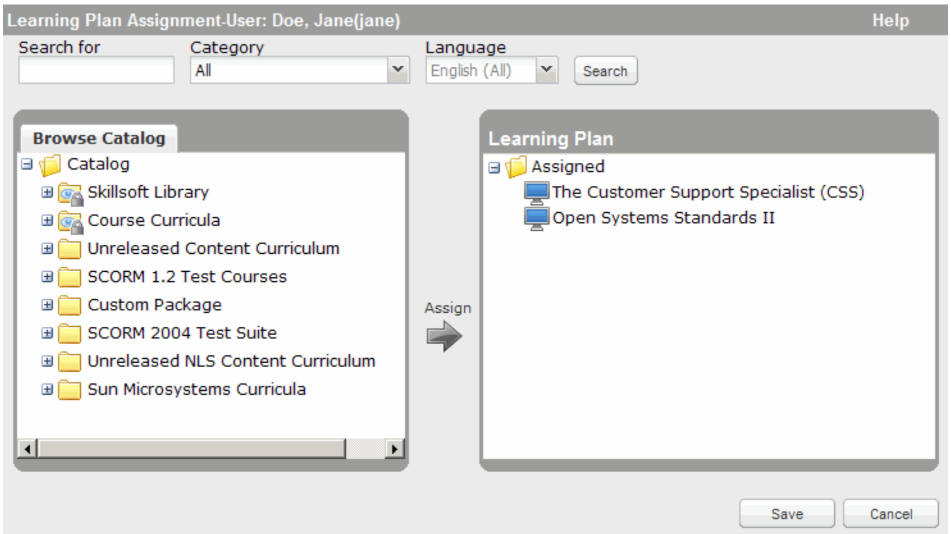


Note: While you can browse the inherited Development Plan assignments for the user or group, to modify these, you must modify the assignments of the parent group.

4. Do one of the following:

   - If you have selected a user, click **Edit Individual Assignments**.
   - If you have selected a group, click **Edit Group Assignments**.

   The Development Plan Assigner page displays.



5. Browse or search the library to find the learning asset that you want to add, and select it. You can also add a specific book section or course topic to the Assigned folder.

6. Move your mouse over the asset title.

   A **Show Details** link displays.

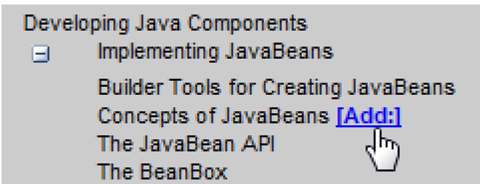
7. Click **Show Details**.

8. Click ⊞ to expand the relevant book chapter or course lesson.

   A list of the book sections or course topics display.

9. Hover your mouse over the book section or course topic you want to add to the Assigned folder.

   An **Add** link displays:

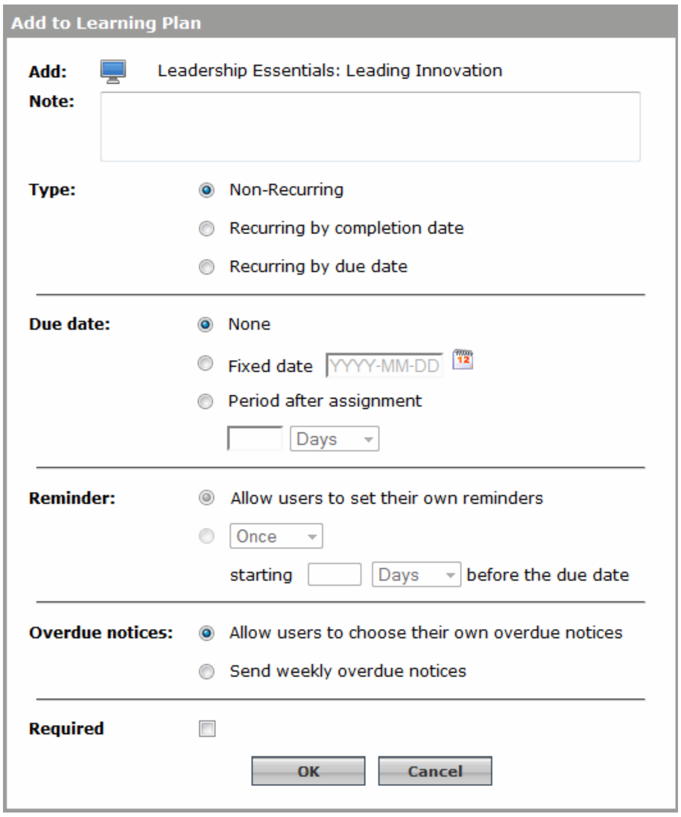


10. Click **Add**.

    The Add to Learning Plan dialog box displays.

11. Click , or drag the asset to the right pane and drop it into the Assigned folder.

The Add to Learning Plan dialog box displays.



Depending on the configuration of your site, one or more of the settings shown in the image above might not be available.

12. If the option exists, select **Non-recurring**.

13. Enter a **Note** (for example, the objective of the learning asset) up to 100 characters.

14. Select a **Due Date**.

    - **Fixed date** is a date you select from the calendar.

    - **Period after assignment** is the number of days, weeks or years from the date you assign the asset to the user.

15. Select the type of **Reminder**.

    - Select **Allow users to choose their own overdue notices** to have the user set his own reminder.

    - Select a one-time or recurring email to be sent to the user automatically.

Note: If you set a reminder, you must also enter the number of days before the asset's due date to send the initial or one-time reminder email. The reminder e-mail contains direct links to the asset itself and to its details page.

16. Optionally, select ☑ **Overdue notices** to send weekly email reminders if the asset is not completed by the specified Due Date.

17. If applicable, select ☑ **Required**.

Note: This setting does not affect the behavior of application; it is used for reporting. It differentiates required assets from optional ones.

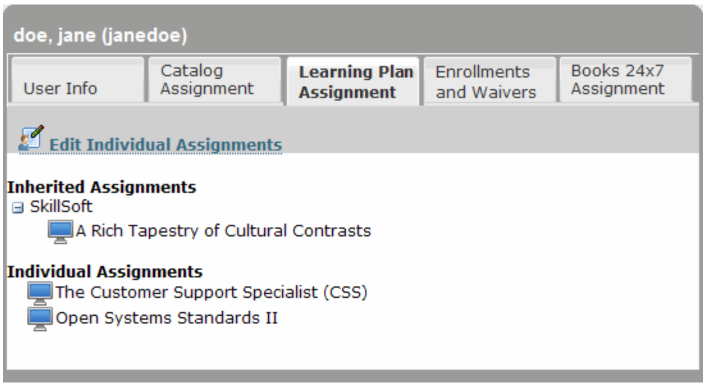
18. Click **OK**. The asset displays in the user's Development Plan set in the **Assigned Learning** tab in his learning plan, and is automatically in an approved state.
19. Click **Save**.
20. If your site is configured to do so, the Preview Email Template dialog box displays, where you can send an email about the assignment:
    a. If desired, enter a personal message in any language at the top of the body of the email, and click **Send**. You can enter a maximum of 1,024 characters. Click **Don't Send** if you do not want to send the email.
    b. In the case of a group assignment, click **Send** again in the confirmation window that displays to confirm the action.

To add a recurring asset to a Development Plan set for a group or user

Note: The types of assets you can restart include courses, test preps, SkillSims, custom content, practice labs, and recorded Dialogue sessions. For more information, see Compliance.

1. Click **Users & Groups > User Management** on the navigation bar.
2. In the left panel, find the group or find the user whose assignments you want to modify, and select that group or user.
3. In the right panel, click the **Development Plan Assignment** tab.

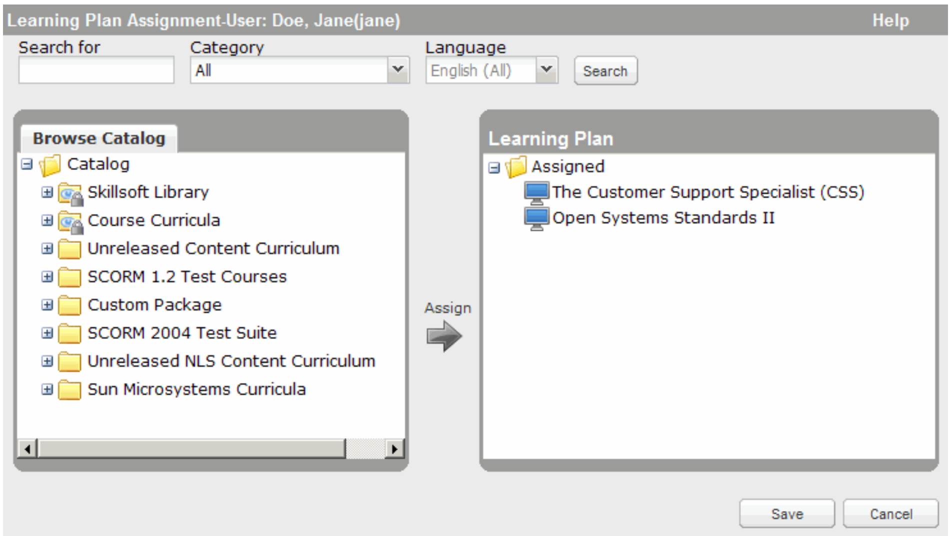
   All assignments for the user or group display:



Note: While you can browse the inherited learning plan assignments for the user or group, to modify these, you must modify the learning plan assignments of the parent group.

4. Do one of the following:
   - If you have selected a user, click **Edit Individual Assignments**.
   - If you have selected a group, click **Edit Group Assignments**.

The Learning Plan Assigner page displays.



5. Browse or search the library to find the learning asset that you want to add, and select it. You can also add a specific book section or course topic to the Assigned folder.

6. Move your mouse over the asset title.

   A **Show Details** link displays.

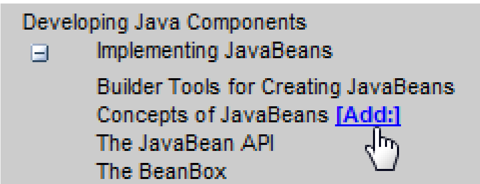
7. Click **Show Details**.

8. Click ⊞ to expand the relevant book chapter or course lesson.

   A list of the book sections or course topics display.

9. Hover your mouse over the book section or course topic you want to add to the Assigned folder.

   An **Add** link displays:

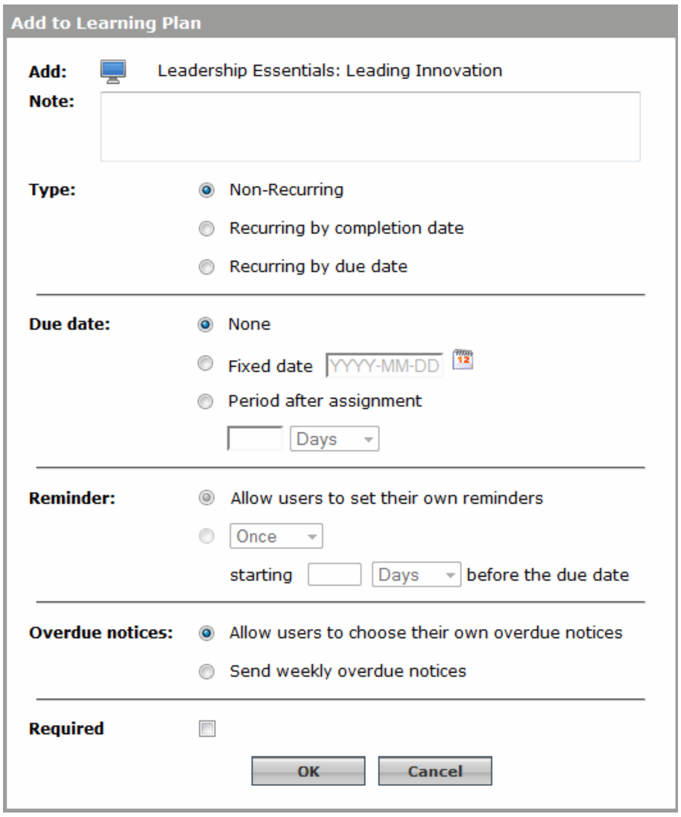


10. Click **Add**.

    The Add to Learning Plan dialog box displays.

11. Click ➡, or drag the asset to the right pane and drop it into the Assigned folder.

The Add to Learning Plan dialog box displays.



Depending on the configuration of your site, one or more of the settings shown in the image above might not be available.

12. Enter a **Note** (for example, the objective of the asset) up to 100 characters.

13. Select the **Type** of asset.

   - Non-recurring asset (see *To add an asset to the Development Plan for a group or user,* above)

   - Recurring by completion date

a Select **Recurring by completion date**.

b Enter the **Initial Due Date**.

This date is the first time the assigned content will be due for completion. Enter a numeric value and select **Days**, **Weeks** or **Years** from the drop-down list. (For example, if you assign an asset on May 1, and enter the **Initial Due Date** as **30 Days**, the assignment is due on May 31.)

c Enter the **Recurrence**.

This becomes the date from which the reassignment value is based. Enter a numeric value and select **Days**, **Weeks** or **Years** from the drop-down list. For example, if you set the **Recurring Due Date** to May 1, 2014 and the user completes the asset on February 1, 2014 (earlier than expected), the next due date remains May 1, 2015.

d Set the **Open window**.

The time frame set here determines when the user can access the content. If, for example, a course repeats yearly, you may not want a user to take the course on December 31, 2014 and again on January 1, 2015 to fulfill the requirement. The Open Window option allows you to specify when you want the course available to the user for training.

e For the **Reminder**, select one of the following:

- **Allow users to set their own reminders**
- **Set your reminder:** Select the frequency from the drop-down list and enter a number of days, weeks or months prior to the due date to send the reminder. (For example, a **Daily** reminder set for **5 Days** before the due date.)

Note: If you set a reminder, users cannot change it. However, if you allow users to set their own reminders, you can override them with a reminder that you set (which also cannot be changed by users).

f For **Overdue notices**, select one of the following:

- **Allow users to choose their own overdue notices**
- **Send weekly overdue notices:** The system sends an email the day after the due date and every 7 days thereafter until the user completes the course. The Overdue notices setting is not available if you are adding a series from the Library, because the series will contain multiple courses that may be in varying stages of completion.

g If applicable, select ☑ **Required**.

Note: This setting does not affect the behavior of application; it is used for reporting. It differentiates required assets from optional ones.

h Click **OK**. The Add to Learning Plan dialog box closes and the content displays in the **Assigned Learning** tab in the learning plan. If the content is for the Development Set, it displays in that set within the tab.

- Recurring by due date

i Select ⊙ **Recurring by due date**.

j Enter the **Initial Due Date**.

This date is the first time the assigned content will be due for completion. Enter a numeric value and select **Days**, **Weeks** or **Years** from the drop-down list. (For example, if you assign content on May 1, and enter the **Initial Due Date** as **30 Days**, the assignment is due on May 31.)

k Enter the **Recurrence**.

Reassign every x Days/Weeks/Years based on recurring due date: Enter the number of days, weeks or years when you want this assignment to reassign (reappear) in the user's learning plan. Enter a numeric value and select **Days**, **Weeks** or **Years** from the drop-down list.

Recurring Due Date: This becomes the date from which the reassignment value is based. Enter a numeric value and select **Days**, **Weeks** or **Years** from the drop-down list. For example, if you set the **Recurring Due Date** to May 1, 2014 and the user completes the asset on February 1, 2014 (earlier than expected), the next due date remains May 1, 2015.

Note: For example, on May 1, 2014, you set the **Initial Due Date** to 30 days after the assignment, making the asset due on May 31, 2014. If the **Recurring Due Date** is set to May 31, 2015 (because you want the user to take the course every year), and you set the **Reassign every...** field to **180 Days**, then the content displays in the learning plan on November 27, 2014 and the next time the content is due is the date set in the **Recurring Due Date** field.

l Set the **Open window**.

The time frame set here determines when the user can access the content. If, for example, a course repeats yearly, you may not want a user to take the course on December 31, 2014 and again on January 1, 2015 to fulfill the requirement. The Open Window option allows you to specify when you want the course available to the user for training.

m For the **Reminder**, select one of the following:

- **Allow users to set their own reminders**
- **Set your reminder:** Select the frequency from the drop-down list and enter a number of days, weeks or months prior to the due date to send the reminder. (For example, a **Daily** reminder set for **5 Days** before the due date.)

Note: If you set a reminder, users cannot change it. However, if you allow users to set their own reminders, you can override them with a reminder that you set (which also cannot be changed by the user).

n For **Overdue notices**, select one of the following:

- **Allow users to choose their own overdue notices**
- **Send weekly overdue notices:** The system sends an email the day after the due date and every 7 days thereafter until the user completes the course. Note that the Overdue notices setting is only available if you are assigning an *individual course* to a learning plan (and for no other type of content). It is not available if you are adding a curriculum folder of courses since the folder will contain multiple courses that may be in varying stages of completion.

Note: If the content is a *course*, for **Overdue notices**, select one of the following:
- users can choose whether to receive overdue notices by email, or
- overdue notices should be sent (and users should not be given the choice to receive these notices)

o Click **OK**. The Add to Learning Plan window closes and the content displays in the user's learning plan. If the content is for the Development Set, it displays in that set within the tab.

14. Click **OK**.
15. Click **Save**.
16. If your site is configured to do so, the Preview Email Template dialog box displays, where you can send an email about the assignment:

    a. If desired, enter a personal message in any language at the top of the body of the email, and click **Send**. You can enter a maximum of 1,024 characters. Click **Don't Send** if you do not want to send the email.

    b. In the case of a group assignment, click **Send** again in the confirmation window that displays to confirm the action.

Create and Assign a Learning Event for a Development Plan

You can use a learning event to track training completed outside of the Skillport LMS, such as a conference, training course or webinar. You must create the learning event at the same time you assign it to a user or group.

To assign a learning event to an individual user's Development Plan set

1. In Skillport Administrator, click **Users and Groups** > **User Management** from the top navigation bar.

   The User Management page displays.

2. In the Users and Groups pane, navigate to the learner name.

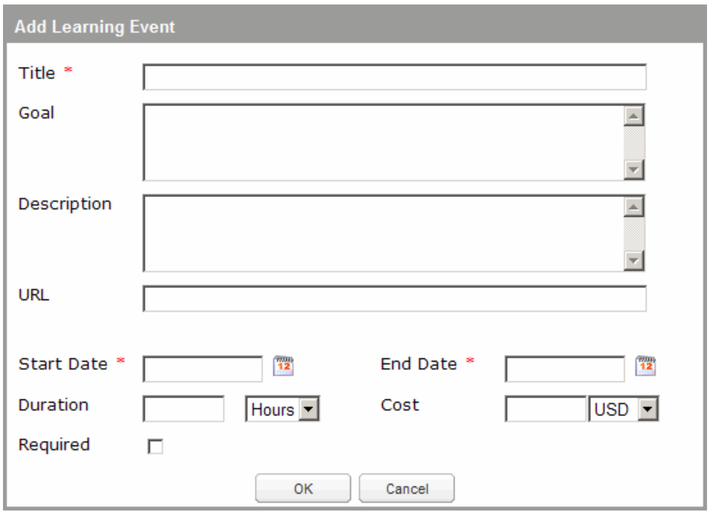
3. In the right pane, click the **Dev Plan Assignment** tab.

4. Click **Edit Individual Assignments**.

   The Development Plan Assigner dialog box displays.

5. At the top right of the Development Plan Assigner dialog box, click **Create LE**.

   The Add Learning Event dialog box displays:



6. Enter the **Title**, **Start Date** and **End Date**.

7. Optionally, enter a **Goal** (up to 100 characters), **Description**, **URL**, the **Duration** (in **Hours** or **Days**), and the **Cost**.

8. If asset completion is required, select **Required**.

   Note: This setting has no impact on the system's behavior; it is an attribute that displays in generated reports.

9. Click **OK**.

   The learning event displays in the Development Plan set in the **Assigned Learning** tab of the user's learning plan.

To assign a learning event to a group's Development Plan set

1. In Skillport Administrator, click **Users and Groups** > **User Management** from the top navigation bar.

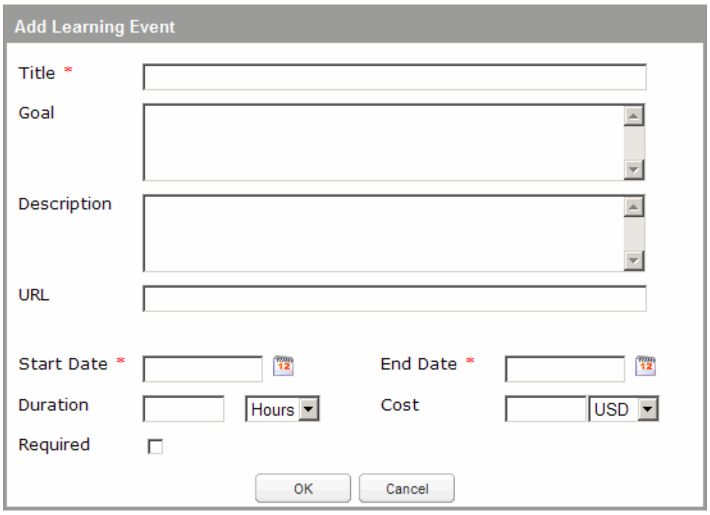
The User Management page displays.

2. In the Users and Groups pane, navigate to the group name.
3. In the right pane, click the **Development Plan Assignment** tab.
4. Click **Edit Group Assignments**.

   The Development Plan Assigner dialog box displays.

5. At the top right of the Development Plan Assigner dialog box, click **Create LE**.

   The Add Learning Event dialog box displays:



6. Enter the **Title**, **Start Date** and **End Date**.
7. Optionally, enter a **Goal** (up to 100 characters), **Description**, **URL**, the **Duration** (in **Hours** or **Days**), and the **Cost**.
8. If asset completion is required, select **Required**.

Note: This setting has no impact on the system's behavior; it is an attribute that displays in generated reports.

9. Click **OK**.

   The learning event displays in the Development Plan set on the **Assigned Learning** tab of each group member's learning plan. The Development Plan displays as **Approved**.

Recurring Assets (Compliance)

Compliance

What is Compliance?

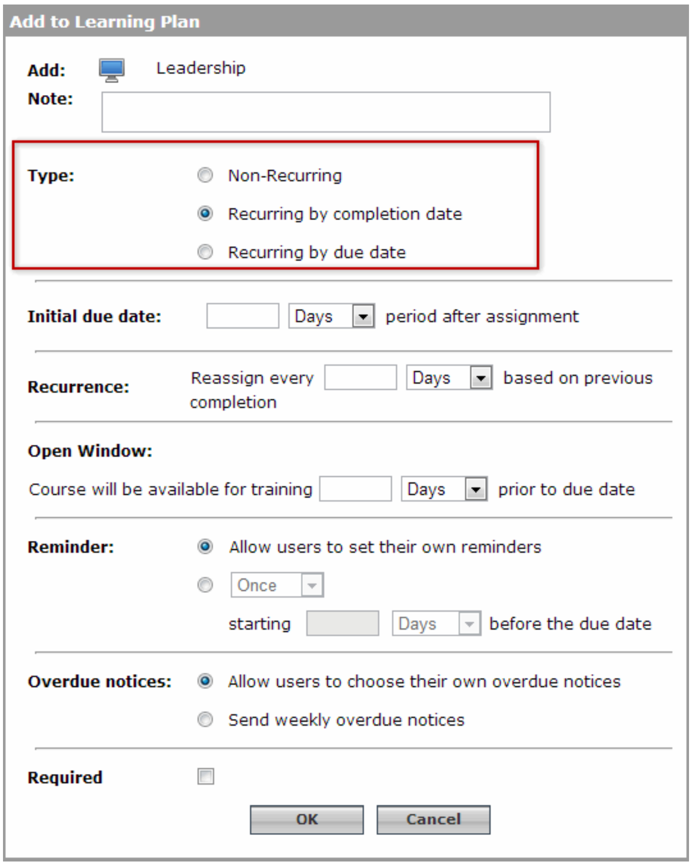
When you are *in compliance* within Skillport, you have successfully completed the specified learning asset(s) your organization set forth, by the specified due date.

You are *not in compliance* within Skillport when the time period for asset completion has passed, and the asset is not successfully completed. If you are not in compliance, check with your organization to determine next steps to be in compliance.

Understanding Recurring Assets

What is a recurring asset?

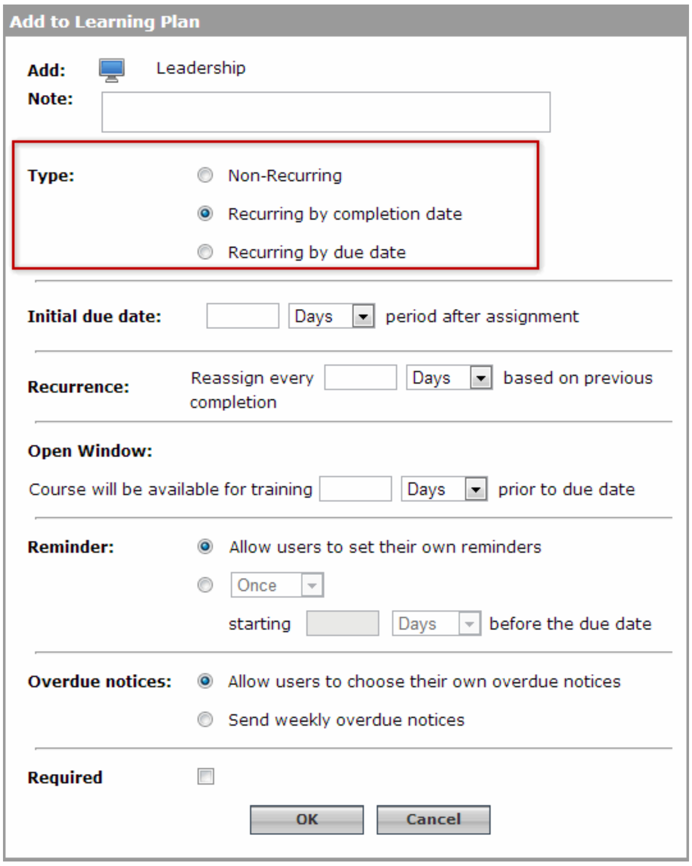
A recurring asset is an *administrator-assigned asset* that learners must retake at specified intervals (for example, every year to maintain a certification). When an Admin assigns a recurring asset to a learner, he can select what type of recurrence he wants the asset to follow:



Once assigned, and outside of the open window, the asset displays a **Launch in Review** link instead of the **Launch** link wherever the learner can access the asset (from his learning plan, search results, or Library Browse results).

Where to designate an asset as recurring

If recurring assets are enabled for the organization, there are slight differences when assigning content to learning plans. A new area (**Type**) appears in the Add to Learning Plan dialog box:



How recurring assets are presented within the learning plan

When compliance is configured for your site, there are differences in how the assets are presented within learning plans. Stringency rules are the logic behind how Skillport prioritizes required assets. They are as follows:

Individual Requirement (Overridden Assignments) or Group Requirement (Inherited Assignments)

- The individual assignment is more stringent, and takes priority over the group (inherited) assignment.

Required Asset or Optional Asset

- The required asset is more stringent and takes priority over the optional asset.

Recurring Assignment Type

- An asset marked as *Recurrence by Completion Date* is more stringent than and takes priority over assets marked as *Recurrence by Due Date*.

Due Date (Only for Recurring Due Date)

- The closest due date, or the Most Overdue, is more stringent than other assets.

Initial Training

- The smallest period-based assignments take priority over assignments with longer periods.

Enable a forced restart of assets

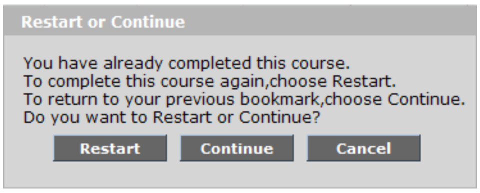
Using the Enable Forced Restart web site switch, you can configure your Skillport site to force an asset to restart once it is completed.

If the Enable Forced Restart web site switch is **enabled:**

- This setting affects any self-assigned assets, and any non-recurring assignments (both self-assigned and manager-assigned) where the asset has the "Allow Multiple Completions" flag set in the completion criteria.
- When a user launches a completed course, a new progress record is automatically created, and the previous progress record is archived.

If the Enable Forced Restart web site switch is **disabled:**

- When launching an asset that has already been completed, learners are given a choice as to create a new progress record or not. They are presented with the following message:



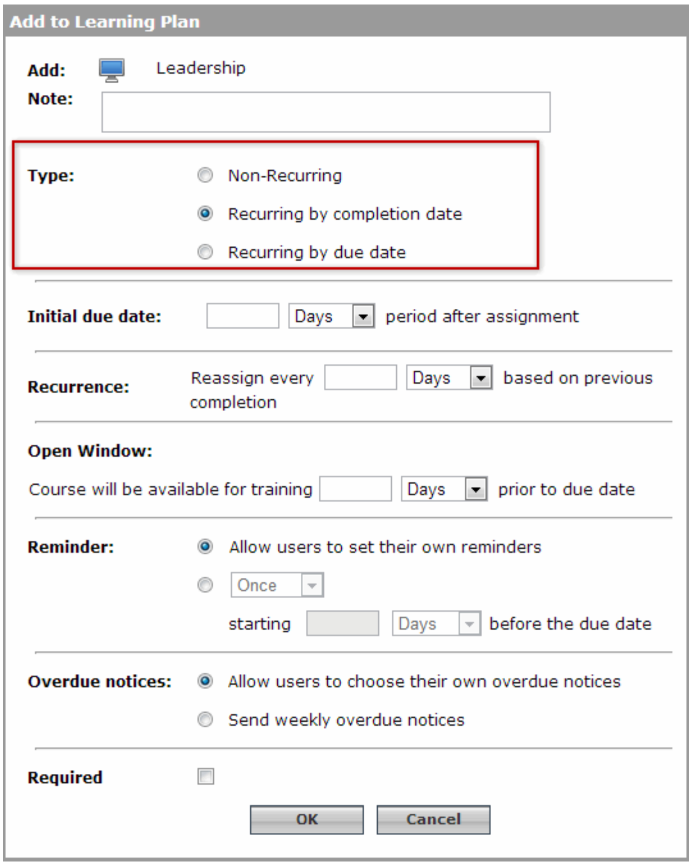
  - **Restart:** This freezes the last completion record and creates a new record in the learner transcript that counts toward the next completion.
  - **Continue:** This does not create a new record in the learner transcript; instead, it allows the learner to re-enter the last completion with the goal of changing and improving its score. If the learner selects this option, he is returned to his previous bookmark, and the progress he makes is applied to his last completion.

Note: For procedures, see the *To add a recurring asset to a learning plan* drop-down in Assign an Asset to a Learning Plan.

Recurring Assets vs. Assets That You Can Restart

What is a Recurring Asset?

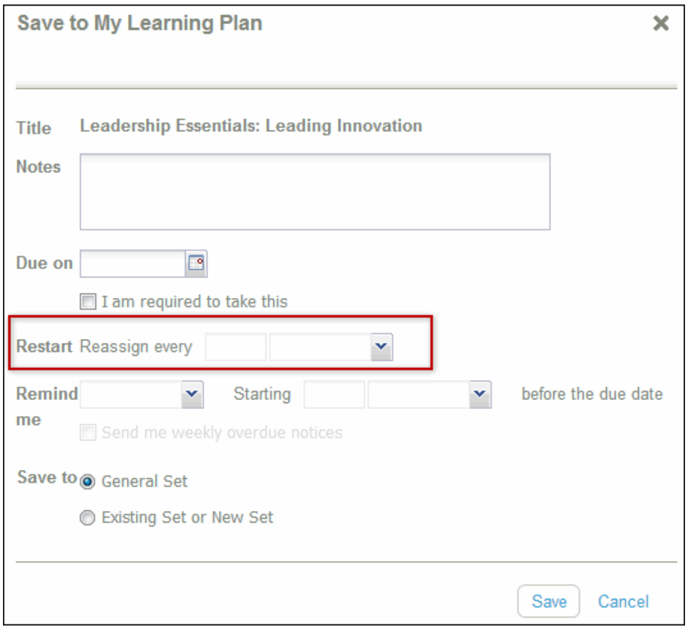
A recurring asset is an *administrator-assigned asset* that learners must retake at specified intervals (for example, every year to maintain a certification). When an Admin assigns a recurring asset to a learner, he can select what type of recurrence he wants the asset to follow:



Once assigned, and outside of the open window, the asset displays a **Launch in Review** link instead of the **Launch** link wherever the learner can access the asset (from his learning plan, search results, or Library Browse results).

What is an Asset that can be Restarted?

An asset that learners can restart is a *self-assigned asset* that can be restarted at user-specified intervals (for example, every year as a memory refresher course). Assets that learners can restart are determined by the learner when he is adding an asset to his learning plan:



For more information, see Recurring Assets and the Assets You Can Restart topics in the Skillport Learner help.

Assets That Learners Can Restart

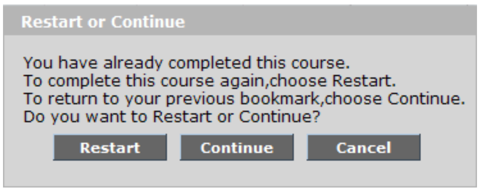
If your site is configured for it, you can restart (take again) the following types of assignments:

- **Multiple Completions**

  Typically, you can complete a course only once. However, your site may allow for a course to be completed multiple times, which gives you more chances to earn a higher score or satisfy specific qualifications for the course. Your learner transcript reflects the highest scores for all course completions, so you will see multiple records for a course you have completed multiple times.

- **Recurring Learning Plan Assignments**

  When you launch an asset you've already completed within its open window timeframe, and it has been marked as recurring, you receive the following prompt:



- **Restart:** This freezes the last completion record and creates a new record in the learner transcript that counts toward the next completion.
- **Continue:** This does not create a new record in the learner transcript; instead, it allows you to re-enter the last completion with the goal of changing and improving its score. If you select this option, you are returned to your previous bookmark, and the progress made is applied to your last completion.

See Recurring Assets for more information.

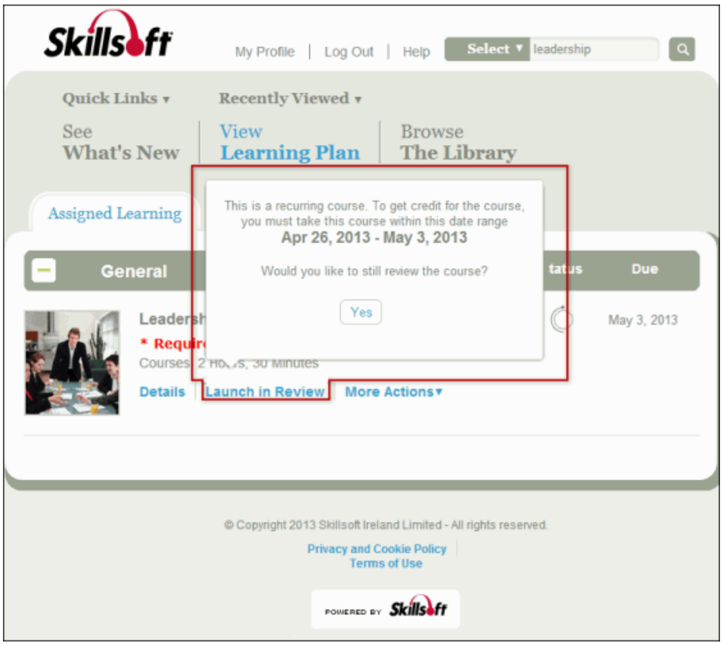
Important Information About Recurring Assets

As you work with recurring assets, keep in the mind the following:

- The Skillsoft Course Manager (SCM) is an application that manages downloaded course content. Because the SCM is not aware of multiple progress records, learners cannot use it to record any assets that they can restart.
- Each completion of a recurring asset has its own record within reports.
- Your site might be configured to force learners to **always restart** the 2 types of assets described above. For more information, see the *Enable a Forced Restart of Assets* section in Understanding Recurring Assets and the Enable Forced Restart setting in the Web Site Switches topic.

Note: A restart only occurs when, once an asset is completed, the learner launches the asset again. The learner is presented with a message about restarting the asset before any progress is made on the new launch.

- Assets that can be restarted display special icons in the learning plan. See Learning Plan Icons for more information.
- Some assets may only be available for credit during a specific time period (the Open Window). Click a recurring asset within the learning plan to view the Open Window dates:



Advanced Compliance

Advanced Compliance is a feature set in Skillport that provides a more complex implementation of compliance programs for your organization.

As an administrator, you can configure and manage Advanced Compliance to:

- Create demographic groups to assign learning programs to groups of users
- Create and edit learning plan assignments for users and groups
- Grant completions for non-web-based (non-WBT) courses
- Assign exemptions and equivalencies
- Create prerequisites
- Create and activate automated emails for users, supervisors, and administrators
- Run reports
- Set up security levels and grant other administrators access to certain Advanced Compliance features

Note: The Advanced Compliance feature set is only available if it has been enabled on your site.

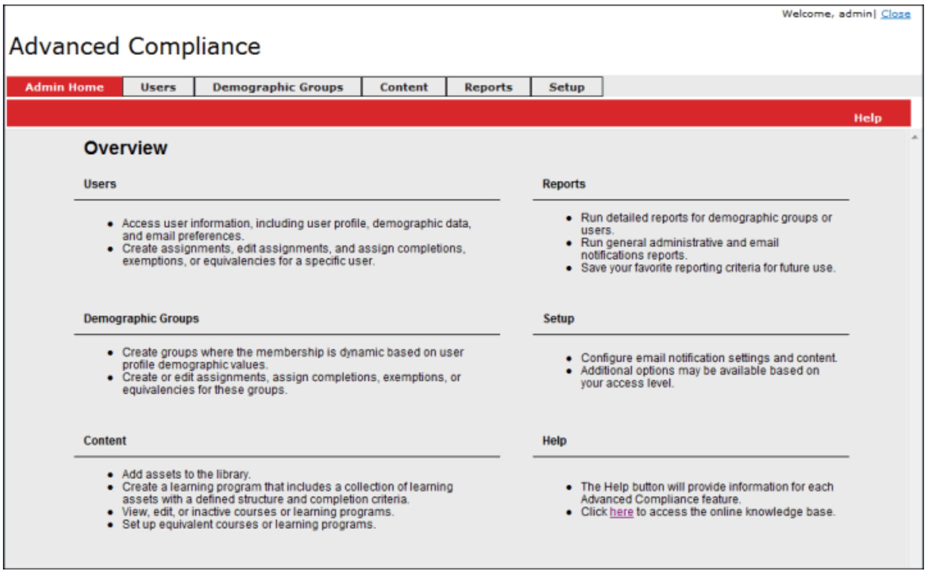
Overview

If you are assigned a Company Admin, Admin, or Manager role within Skillport, you can access the Advanced Compliance Administrator to configure your organization's Advanced Compliance features. A Skillsoft representative will work with you to achieve the desired level of functionality.

To access the Advanced Compliance Administrator:

1. Click **Quick Links > Admin** in the Skillport Learner.
2. Click **Access Advanced Compliance** in the Users & Groups section on the Skillport Administrator home page.

   The Advanced Compliance Administrator Home page displays.



From the Advanced Compliance Administrator home page, you can access the following options on the navigation bar:

- **Users:** View user information, create individual learning plan assignments, create individual exemptions and equivalencies, and assign completions.
- **Demographic Groups:** Create demographic groups using Skillport User Profile fields, create group learning plan assignments, and create group exemptions and equivalencies.
- **Content:** View available Advanced Compliance courses, create learning programs, create prerequisites, and designate equivalent courses.
- **Reports:** View and print training reports for individual users and groups of users.
- **Setup:** Specify security levels for administrators and whether to use email notifications.

From any of these areas, you can select:

- **Close** to return to the Skillport Administrator home page.
- **Help** for instructions on how to use the Advanced Compliance Administrator.

Advanced Compliance Limitations in Skillport

There are several limitations to be aware of when using Advanced Compliance in Skillport 8:

- Advanced Compliance assets are not available to be Featured Topics on the Skillport 8 What's New page.
- Advanced Compliance assets cannot be searched or browsed for in Skillport 8.
- No community features are available for Advanced Compliance assets.
- Assets available through the Advanced Compliance feature set are not available in the Skillport Catalog.
- Reports for Advanced Compliance assignments are separate from other Skillport assignments, and are accessible only through the Advanced Compliance Administrator.
- ILT content cannot be assigned using the Advanced Compliance feature set.

Working with Users

You can perform user-specific administrative functions, such as editing user email settings, making learning plan assignments for individual users, assigning exemptions or equivalencies, assigning completions, or running reports.

View or Edit User Information

All user data is maintained in Skillport and is passed to Advanced Compliance on a nightly basis. There is no capability within Advanced Compliance to add new users.

To utilize Advanced Compliance features for new users, the user must first be added to your Skillport site. The new user will display in the Advanced Compliance Administrator after the user has accessed Skillport or after the next nightly data synchronization process has run, whichever occurs first.

You can view the user information from Skillport in the Advanced Compliance Administrator. However, the only field you can edit is the **Send Email to User** field.

To view or edit user information

1. Click **Users > User Information** on the navigation bar.
2. In the **Select administrative function** drop-down list, select **Edit User Info**.
3. Search for the user by entering the first letter(s) of the last name, then click **Find**.

   You can also search by User ID or one of the two customer-defined text fields, if they are included in your user information (for example, account number or corporate ID).
4. Click the desired user name from the list.
5. On the Edit User page, view the user's information.
6. (Optional) Select a different value for the **Send Email to User** field. Valid values are **Yes** and **No**.
7. Click **Submit**.

Assign a Learning Plan to a User

If a particular user has a unique learning plan assignment different from the requirements designated for a demographic group, you can assign training to an individual user as needed.

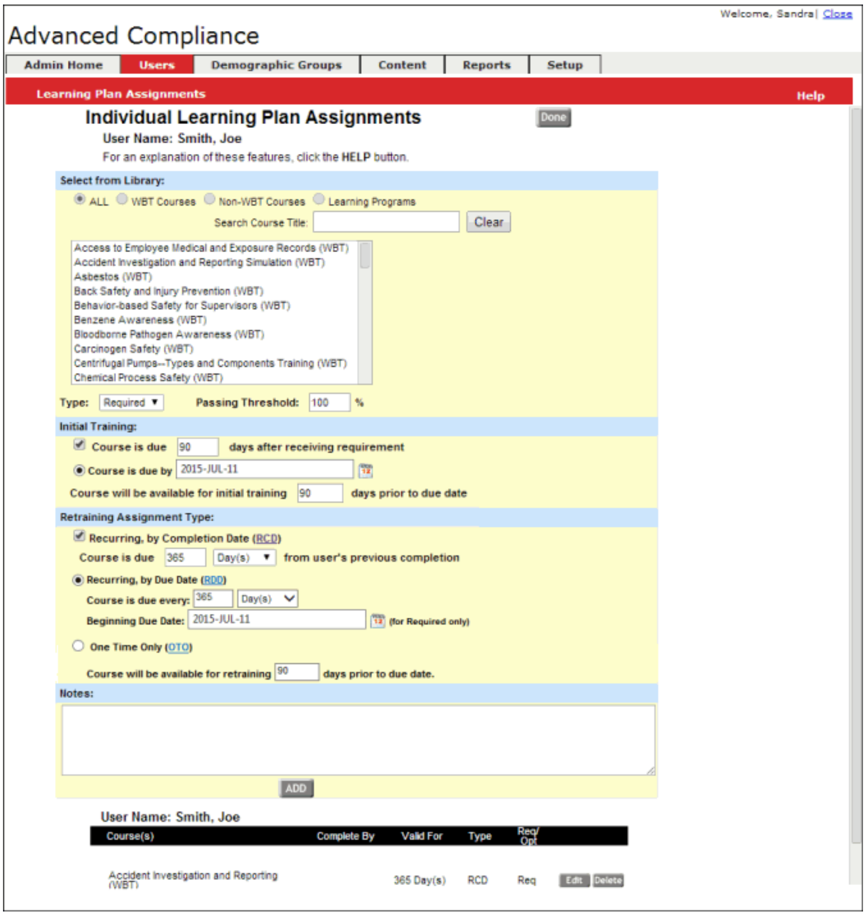
To assign a learning plan to a user

1. Click **Users > Learning Plan Assignments** on the navigation bar.

   The Assign Individual Learning Plan Assignments page displays.
2. To search for the user by **Last Name**, enter the first letter(s) of the last name.

   Or, use the drop-down menu to select a different search criteria.
3. Click **Find**. A list of users matching your search criteria displays.
4. Click the desired user name from the list.

The Individual Learning Assignments page displays.



5. In the **Select from Library** section, select a requirement (or use Ctrl+Click to select multiple requirements) from the library. Alternately, you can enter a search term in **Search Course Title**. You can enter a full course title, a partial title, or partial words.

6. In **Type**, specify whether the requirement is **Required** or **Optional**. Required assignments have a due date; optional assignments do not have a due date.

7. In **Passing Threshold**, specify the score required for the user to achieve a completion. The default value is 100%.

Note: Some SCORM course players control the passing threshold in the course player and will not adhere to the passing threshold set in the LMS.

8. In **Initial Training**:

   a. Select the option for when the course is due. Then, enter the number of days after receiving the course requirement that the course is due, or enter the calendar date when the course is due, depending on the selected option.

   Note: If a past calendar date is entered, the due date defaults to the same date the following year. For example, if an Initial Training date of 1/1/2014 is entered on 3/1/2014, the due date defaults to 1/1/2015.

b. In **Course will be available for initial training X days prior to due date,** specify how many days prior to the due date the course will become available on the user's learning plan.

   To make the course available immediately, this number must be equal to or greater than the number of days until the course is due. For example, if you select the Initial Training to be due 90 days after the user receives the course and you want to make the course available to the user immediately, the availability value must be set to at least 90 days.

9. In **Retraining Assignment Type**, specify whether training is considered "retraining" and how long the training is valid, or whether the training is considered "one time only" training.

   - **Recurring, by Completion Date (RCD):** This is the most stringent assignment type. Users will be required to take the course on a recurring basis, and their next due date is calculated from their last completion date. Recurrence is based on the number of days, weeks, or years you enter. After a user completes the course, his next due date will be calculated as last completion plus the validity period.

   - **Recurring, by Due Date (RDD):** This allows you to specify a calendar date when the learning plan is due, regardless of past completion dates. This assignment type is also required on a recurring basis depending on the number of days, weeks, or years you enter. The next due date is calculated as previous due date plus the validity period. You can also specify how many days prior to the recurring due date the course will become available on the user's learning plan. To make the course available immediately, this number must be one day less than the recurrence period. For example, if you specify that the course is due 365 days from the user's previous completions, and you want to make the course available to the user immediately, the availability value must be set to 364 days.

   - **Course will be available for retraining X days prior to due date:** For RCD and RDD training, specify when courses will be made available for retraining. This time period indicates when a course will move from the Completed Training section of a user's Learning Plan back to the Current Training section.

   - **One Time Only:** Learning plan assignments of this type are required only once for users.

10. If desired, enter information in **Notes**. Notes are for administrator use only and do not display on administrative reports.

11. Click **Add**. The new learning plan assignment displays in the Course(s) list at the bottom of the page, and on the user's Learning Plan.

12. Repeat steps 5-11 until all desired learning plans have been assigned to the user.

13. Click **Done**.

Note: Individual learning plan assignments take precedence over all other assignments for a user. If a user has the same course assigned through a group and as an individual learning plan assignment, the individual assignment takes precedence. This means individual requirements can be made less stringent than group requirements. For more information, see Stringency Rules.

Assign an Exemption or Equivalency to a User

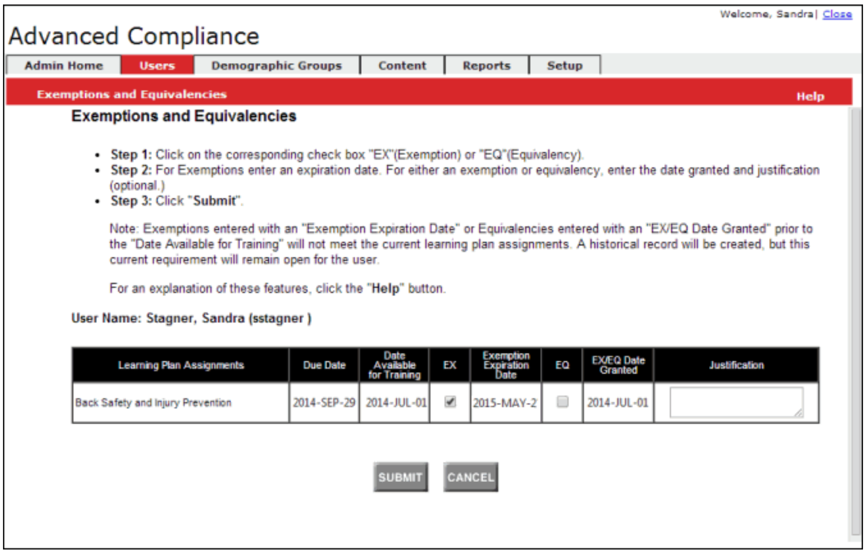
You can give a user credit for a learning plan assignment by assigning an equivalency for a course. If a user is exempt from training and therefore can have the learning plan assignment waived, you can assign an exemption for the course.

Once exemptions or equivalencies have been assigned, the learning plan assignment no longer displays on the user's learning plan. The exemption or equivalency is listed in the user's transcript.

To assign an exemption or equivalency to a user

1. Click **Users > Exemptions and Equivalencies** on the navigation bar.

   The Exemptions and Equivalencies page displays.



2. To search for the user by **Last Name**, enter the first letter(s) of the last name.

   Or, use the drop-down menu to select a different search criteria.

3. Click **Find**. A list of users matching your search criteria displays.

4. Click the desired user name from the list.

   The Exemptions and Equivalencies page displays, showing the list of learning plan assignments for the selected user.

5. To assign an exemption:

   a. Select the corresponding check box in the **EX** column for the desired course.

   b. In **Exemption Expiration Date**, enter the date the course exemption expires.

   c. In **EX/EQ Date Granted**, enter the date the exemption was granted.

   d. (Optional) In **Justification**, enter the reason for the exemption.

6. To assign an equivalency:

   a. Select the corresponding check box in the **EQ** column for the desired course.

   b. In **EX/EQ Date Granted**, enter the date the equivalency was granted.

   c. (Optional) In **Justification**, enter the reason for the equivalency.

7. Click **Submit**.

Delete an Exemption or Equivalency from a User

When an equivalency or exemption is deleted, the learning plan assignment will be displayed on the user's learning plan under Current Training.

To delete an exemption or equivalency from a user

1. Click **Users > Exemptions and Equivalencies** on the navigation bar.

   The Assign Exemptions and Equivalencies page displays.

2. To search for the user by **Last Name**, enter the first letter(s) of the last name.

   Or, use the drop-down menu to select a different search criteria.

3. Click **Find**. A list of users matching your search criteria displays.

4. Click the desired user name from the list.

   The Exemptions and Equivalencies page displays, showing the list of learning plan assignments for the selected user.

5. To delete an exemption, clear the corresponding check box in the **EX** column for the desired course.

6. To delete an equivalency, clear the corresponding check box in the **EQ** column for the desired course.

7. Click **Submit**.

Assign User Completions

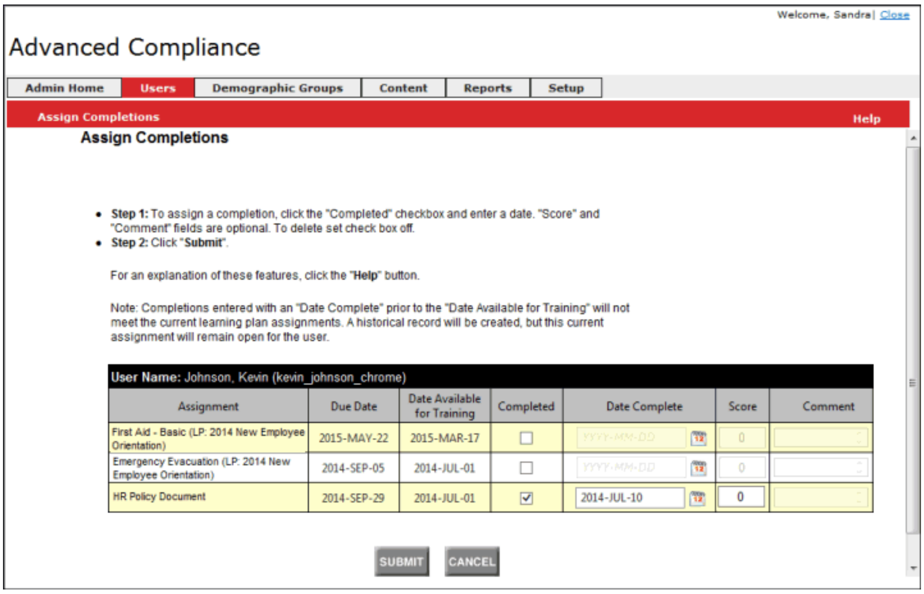
If you have made a learning plan assignment with a non-web-based training (non-WBT) delivery method (such as video, classroom, or CD), you can record a training completion for individual users.

Note: If an HTML link has been assigned and the Completion dialogue box is enabled, the user will get a completion for that non-WBT assignment by accepting the confirmation upon closing the HTML link.

To assign user completions

1. Click **Users > Assign Completions** on the navigation bar.

The Assign Completions page displays.



2. To search for the user by **Last Name**, enter the first letter(s) of the last name.

   Or, use the drop-down menu to select a different search criteria.

3. Click **Find**. A list of users matching your search criteria displays.

4. Click the desired user name from the list.

   The Assign Completions page displays with the user's list of learning plan assignments.

5. For the desired assignment, select the **Completed** check box, then enter a date in **Date Complete**.

   Note: The **Score** and **Comment** fields are optional.

6. Click **Submit**.

Run a User Report

To run a user report

1. Click **Users > User Information** on the navigation bar.

   The User Information page displays.

2. In the **Select administrative function** drop-down list, select the desired user report:

3. Search for the user by entering the first letter(s) of the last name, then click **Find**.

   You can also search by User ID or one of the two customer-defined text fields, if they are included in your user information (for example, account number or corporate ID).

4. Click the desired user name from the list.

5. To specify filter criteria for all reports except the *User Report, Email* report:

   a. To filter the library by delivery method, select the desired **Delivery Method** from the drop-down list.

b. To filter the library by course status, select the desired **Course Status** from the drop-down list.

c. Select one or more courses to include in the report filter, then click **Select Course**.

To select multiple courses, use Ctrl+Click.

d. Enter date filters, if needed.

6. To specify filter criteria for the *User Report, Email* report:

a. Specify the **Email Type**, either **All**, **Non-recurring**, or **Recurring**.

b. In Sent in Last, enter the desired time period. For example, to view emails sent to a user in the past week, enter a 1 in the Sent in Last box, then select Week from the drop-down list.

7. Select the report output format, either **Web browser**, **PDF**, or **CSV** (spreadsheet).

8. Click **Run Report**.

Working with Demographic Groups

You can create demographic groups, and then make learning plan assignments, assign exemptions or equivalencies, and assign completions to the them.

About Demographic Groups

Demographics refers to the information associated with each user. Demographics are mapped into your Advanced Compliance feature set using the user profile fields from your Skillport site. For information on mapping learning profiles to demographics, contact your Skillsoft representative.

All your reports and assignments are based on the types of demographics you specify. The user demographics enable you to sort reports by this information and make learning plan assignments to specific groups of users.

A *demographic group* is created to enable groups of users having a defined demographic to share the same learning plan assignments. Groups are created using the demographic labels that have already been created in Skillport.

Note: You must create a demographic group before making learning plan assignments.

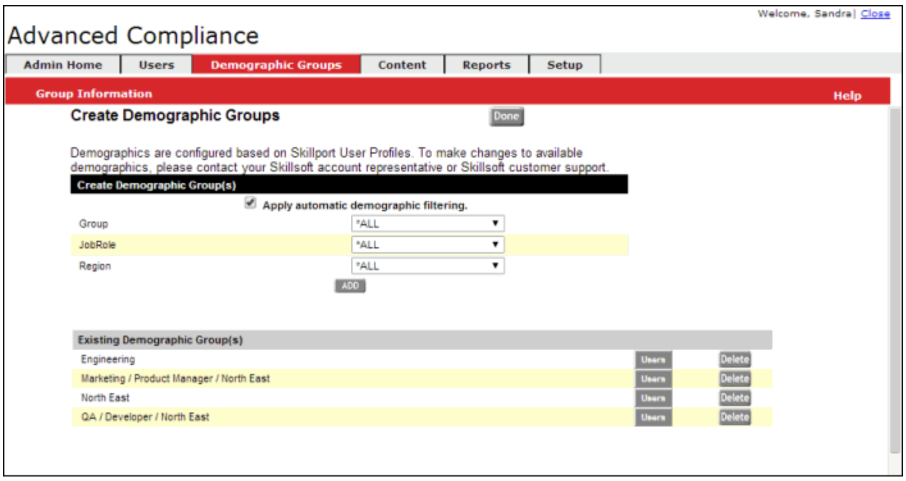
It is recommended that you spend time analyzing the user demographics to determine which demographic groups share the same learning plan assignments and which demographic groups have unique learning plan assignments. For example, if a demographic category (such as Job Function) which includes electricians, welders, and operations shares the same learning plan assignments, you can designate just one demographic group (Job Function = All). However, if your organization has unique learning plan assignments for each job function, the best approach is to create a demographic group for each job function (select a defined job function, such as "electrician").

Create a Demographic Group

To create a demographic group

1. Click the **Demographic Groups > Group Information** on the navigation bar.

   The Create Demographic Groups page displays.

2. In the Create Demographic Group(s) section, for each of the demographic categories, selecting the appropriate demographic label from the drop-down list.

Note: To create demographic groups using only demographic labels associated with user data, select the **Apply automatic demographic filtering** option.

3. Click **Add**.

   The demographic group displays in the **Existing Demographic Group(s)** list. Click **Users** to view the users who are included in the group.

4. When you have defined each demographic group, click **Done**.

   The Create Learning Plan Assignments page displays.

5. To create learning plan assignments, see Create a Learning Plan Assignment for a Group.

Delete a Demographic Group

If learning plan assignments have been assigned to a demographic group, you must delete the learning plan assignments before deleting the demographic group.

To delete a demographic group

1. Click **Demographic Groups > Group Information** on the navigation bar.

   The Create Demographic Groups page displays. The list of demographic groups displays in the Existing Demographic Groups section.

2. For the demographic group you want to delete, click the corresponding **Delete** button.

3. When the message displays asking if you are sure you want to delete the group, click **OK**.

Assign a Learning Plan to a Demographic Group

To create a learning plan assignment for a group

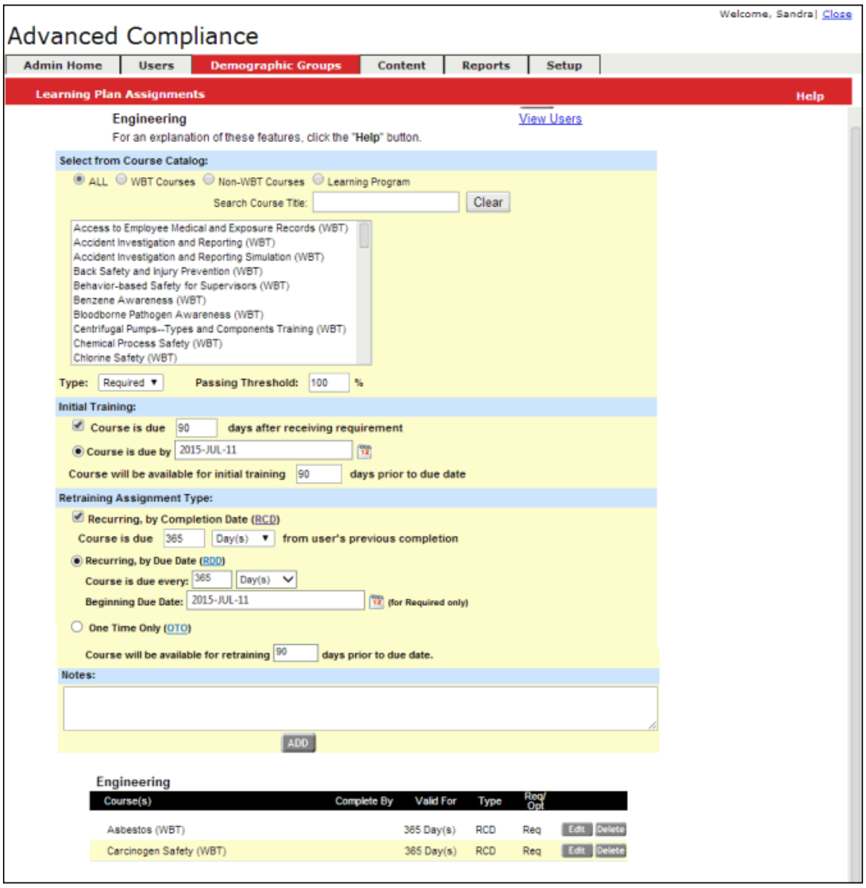
1. Click the **Demographic Groups > Learning Plan Assignments** on the navigation bar.

   The Create Learning Plan Assignments page displays.

2. To search for a demographic group, enter the search criteria in **Filter Groups**. You can enter either a full or partial group title.

3. In the Demographic Group(s) list, click **Assign** next to the desired group.

The Learning Plan Assignments page displays.



4. In the **Select from Course Catalog** section, select a requirement (or use Ctrl+Click to select multiple requirements) from the library. Alternately, you can enter a search term in **Search Course Title**. You can enter a full course title, a partial title, or partial words.

5. In **Type**, specify whether the requirement is **Required** or **Optional**. Required assignments have a due date; optional assignments do not have a due date.

6. In **Passing Threshold**, specify the score (percentage) required for the user to achieve a completion. The default value is 100%.

Note: Some SCORM course players control the passing threshold in the course player and will not adhere to the passing threshold set in the LMS.

7. In **Initial Training**:

   a. Select the option for when the course is due. Then, enter the number of days after receiving the course requirement that the course is due, or enter the calendar date when the course is due, depending on the selected option.

   Note: If a past calendar date is entered, the due date defaults to the same date the following year. For example, if an Initial Training date of 1/1/2014 is entered on 3/1/2014, the due date defaults to 1/1/2015.

   b. In **Course will be available for initial training X days prior to due date,** specify how many days prior to the due date the course will become available on the users' learning plans.

To make the course available immediately, this number must be equal to or greater than the number of days until the course is due. For example, if you select the Initial Training to be due 90 days after the user receives the course and you want to make the course available to the user immediately, the availability value must be set to at least 90 days.

8. In **Retraining Assignment Type**, select one of the following options to specify whether training is considered "retraining" and how long the training is valid, or if it is "one time only" training:

   - **Recurring, by Completion Date (RCD):** This is the most stringent assignment type. Users will be required to take the course on a recurring basis, and their next due date is calculated from their last completion date. Recurrence is based on the number of days, weeks, or years you enter. After a user completes the course, his next due date will be calculated as last completion plus the specified validity period.

   - **Recurring, by Due Date (RDD):** This allows you to specify a calendar date when the learning plan is due for all users, regardless of past completion dates. This assignment type is also required on a recurring basis depending on the number of days, weeks, or years you enter. The next due date is calculated as previous due date plus the validity period. You can also specify how many days prior to the recurring due date the course will become available on the users' learning plans. To make the course available immediately, this number must be one day less than the recurrence period. For example, if you specify that the course is due 365 days from the user's previous completions, and you want to make the course available to the user immediately, the availability value must be set to 364 days.

   - **Course will be available for retraining X days prior to due date:** For RCD and RDD training, specify when courses will be made available for retraining. This time period indicates when a course will move from the Completed Training section of a user's Learning Plan back to the Current Training section.

   - **One Time Only:** Learning plan assignments of this type are required only once for users.

9. If desired, enter information in **Notes**. Notes are for administrator use only and do not display on administrative reports.

10. Click **Add**. The new learning plan assignment displays in the Course(s) list at the bottom of the page, and on the users' Learning Plans.

11. Repeat steps 4-10 until all desired learning plans have been assigned to the demographic group.

12. Click **Done**.

Edit Learning Plan Assignments

To view or edit learning plan assignments

1. Click the **Demographic Groups > Learning Plan Assignments** on the navigation bar.

2. To search for a demographic group, enter the search criteria in **Filter Groups**. You can enter either a full or partial group title.

3. In the Demographic Group(s) list, click **Assign** next to the desired group.

   The Learning Plan Assignments page displays. The list of courses for the selected demographic group displays at the bottom of the page.

4. To change the training requirement information for a course:
   a. Click **Edit** next to the desired course.
   b. On the Edit Learning Plan Assignment page, edit the fields as needed.
   c. Click **Done**.

Assign an Exemption or Equivalency to a Demographic Group

You can assign exemptions and equivalencies to all users in a demographic group. The values you enter in the **EX/EQ Date Granted**, **Exemption Expiration Date** (for exemptions) and **Justification** fields apply to all users in the group.

To assign an exemption or equivalency to a group

1. Click **Demographic Groups > Exemptions and Equivalencies** on the navigation bar.
2. Select the course from the Course drop-down list.
3. To further filter the group, select the appropriate demographics from the drop-down lists.

   A list of only those users with an open (non-complete) assignment for the selected course and who meet the demographic criteria, if specified, displays.
4. To assign an exemption (waive the course for users who are exempt from training):
   a. Select the **EX** check box.
   b. In **Exemption Expiration Date**, enter the date the course exemption expires.
   c. In **EX/EQ Date Granted**, enter the date the exemption was granted.
   d. In **Justification**, enter the reason for the exemption.
5. To assign an equivalency (give users credit for a learning plan assignment):
   a. Select the **EQ** check box.
   b. In **EX/EQ Date Granted**, enter the date the equivalency was granted.
   c. In **Justification**, enter the reason for the equivalency.
6. To grant the exemption or equivalency:
   - To all users in the list, select the **Select/Unselect All** check box.
   - To only certain users, click the check box beside each name.

     To clear all users, click the **Select/Unselect All** box again. You can clear certain users by clicking the check box beside each name.
7. Click **Submit**.

Delete an Exemption or Equivalency from a Demographic Group

When an equivalency or exemption is deleted, the learning plan assignment will be displayed on each user's learning plan under Current Training.

To delete an exemption or equivalency from a group

1. Click **Demographic Groups > Exemptions and Equivalencies** on the navigation bar.

   The Exemptions and Equivalencies by Demographic page displays.

2. Select the course from the Course drop-down list.
3. To further filter the group, select the desired demographics from the drop-down lists.

   A list of only those users with an open (non-complete) assignment for the selected course and who meet the demographic criteria, if specified, displays.

4. Click **Submit**.
5. To delete an exemption, clear the corresponding check box in the **EX** check box for the desired course.
6. To delete an equivalency, clear the corresponding check box in the **EQ** check box for the desired course.
7. Click **Submit**.

Assign Group Completions

If you have made a learning plan assignment with a non-web-based training (non-WBT) delivery method (such as video, classroom, or CD), you can record a training completion for a demographic group.

Note: If an HTML link has been assigned and the Completion dialogue box is enabled, the demographic group will get a completion for that non-WBT assignment by accepting the confirmation upon closing the HTML link.

To assign completions to a group

1. Click **Demographic Groups > Assign Completions** on the navigation bar.
2. In **Course**, select the desired assignment.
3. If desired, select additional demographic filters for **Department**, **JobRole**, **Region**, and **User Status**.
4. Click **Submit** to generate a list of learners with the course assigned.
5. In **Date Complete**, enter the date for the completion.
6. If desired, enter information in the **Comment** field.
7. In the left column, select the checkbox corresponding to each learner who completed the assignment. To select/clear all learners in the list, select **Select/Unselect All**.

8. (Optional) In *Score*, enter the learner's test score for the assignment.
9. Click **Submit**.

Learning Programs

A *learning program* is a group of courses that you can assign to users or groups, and designate completion requirements for, such as complete all, complete in order, or minimum duration in hours. A learning program can have multiple folders assigned to it, each with its own completion requirements.

Administrators can:

- Create a learning program
- Assign a group of courses to it
- Designate completion requirements for the learning program

The assignment of a learning program allows the Administrator to follow the current process of creating an assignment for a user or group, and at the time of assignment set the conditions in which the Learning Program is successfully completed, such as type, passing threshold, and number of days to complete the assignment.

Note: The **Passing Threshold** value for a learning program is applied to each course within the learning program; it is not a cumulative passing threshold.

The user's learning plan displays a single title for each learning program, with **(LP)** displayed after the title. If you click the Learning Program name, the information about the Learning Program is displayed, including the Description.

If a Learning Program assignment is edited after it has been assigned to users, the following rules apply:

- If the Learning Program has been completed, the users will not have to complete based upon any updates to the Passing Threshold, and the Learning Program will stay marked as "completed".
- If the Learning Program has been partially completed, any courses that had met the passing threshold prior to the change will not be subject to the new passing threshold.
- Any courses in the Learning Program that have not been completed will now need to meet the updated passing threshold percentage.
- If the Learning Program passing threshold is lowered and, based upon that lowered threshold a user would now be eligible to pass a course, the user must re-launch the course in order to receive an updated completion status.
- Only custom Learning prerequisites may be edited. Certain Learning Programs such as "HAZWOPER Annual 8-hour Refresher" are defined and provided by Skillsoft and cannot be customized. To edit these Learning Programs, an administrator must first copy the Learning Program and then edit the contents.
- A Learning Program cannot be edited after it is assigned to a user or demographic group.

Learning Plan Assignments

Initial Training
There are two ways a user can receive Initial Training. The most common way is when the user receives the course assignment for the first time. This can occur either when a user is added or when a user is placed into a Demographic Group having the course assignment. In either case, the user has never had this course assigned during his history.

The second way a user can receive Initial Training is when the course is assigned to the user following a previous assignment of the same course, but the previous assignment has been removed or no longer exists. In this case, a user may have had a previous completion, but that completion is no longer valid.

Examples

1. New Assignment: John Doe is added on 1/1/2013 after being hired. All courses assigned to John Doe are Initial Training.

2. Re-assignment: Jane Doe was a supervisor in 2010, and completed *Behavior-based Safety for Supervisors*.

   In 2011, Jane changed job functions, and *Behavior-based Safety for Supervisor*s was no longer required for her. As a result, her previous course completion was classified as history.

   In 2013, Jane once again moved into a supervisory role, and *Behavior-based Safety for Supervisors* was again required for her job function. The new course assignment is required annually, so her 2010 completion is not valid. As a result, her 2013 assignment will be assigned as Initial Training.

Stringency Rules
Learners are often part of several different training groups and can have individual training requirements assigned as well. As a result, a learner may have the same course assigned multiple times. Overlapping training requirements may have different settings for initial training, recurrences, due dates, and retraining windows.

Multiple listings in a user's learning plan can be confusing, especially if due dates are not the same. Therefore, only one assignment of the course is displayed on the user's learning plan from any overlapping Advanced Compliance assignments. Skillport determines which assignment to display by using a process called *stringency*.

The application of stringency rules for a group or individual determines which one of multiple training assignments takes precedence over the others. Individual training assignments always take precedence over assignments made through a group. This gives an administrator the option to make exceptions at an individual level.

Stringency rules apply in the following order of descending precedence:

Training Requirement Property	Precedence
Individual or Group Requirement	Individual Requirement is more stringent
Required or Optional	Required is more stringent
Training Type	▪ Recurring by Completion Date (RCD) is most stringent ▪ Recurring by Due Date (RDD) ▪ One Time Only (OTO) is least stringent

Validity in Days	The shortest validity or recurring period is more stringent
Due Date (for RDD requirements only)	The earliest due date is more stringent
Assessment minimum score	The highest minimum score is more stringent

Although the learner only sees one assignment, all the unseen assignments for the same course remain in the system as unique group or individual training requirements; training requirements are not combined to form a hybrid requirement. When a training requirement is determined more stringent, *all* parameters for that particular requirement are given to the learner.

For instance, a Required assignment for Back Safety is more stringent than an Optional assignment for Back Safety. If the Required assignment has a passing threshold of 80%, the learner will be required to achieve at least 80% on the course exam, even if the Optional assignment has a 100% passing threshold. This same decision hierarchy applies when determining how an inherited assignment may be edited at the group level. For example, an administrator may edit an optional assignment to Required but cannot edit a required assignment to Optional. When the administrator changes the assignment to Required, he can also make other options less stringent (for example, change the Optional RCD to a Required RDD).

Example:

Jane Smith is a member of the following demographics:

Location: Knoxville

Job Role: Welder

Division: East

She has received several training requirements for *Fire Safety*:

Assignment #1: Individual training requirement that is **Optional**

Assignment #2: Group training assignment for the Welders Training Group that is **Required by Due Date (RDD)** in 90 days

Assignment #3: Group training requirement for Knoxville/East Training Group that is **Required by Completion Date (RCD)** in 180 days

When Jane opens her learning plan, she will see that she has *Fire Safety* as an Optional course with no due date. This was the individual training Assignment #1, which takes precedence over any Group requirements.

If the Training Administrator decides that the course is required, he can either delete the individual training requirement or change its parameters. If Jane's individual training assignment #1 were deleted, when she opens her learning plan, she will see that the two remaining Group requirements for *Fire Safety* are both Required. Assignment #3 is RCD, which takes precedence over RDD in assignment #2. Jane would now see that *Fire Safety* was a required course due in 180 days.

Inherited Learning Plan Assignments

If a learning plan assignment has been established for a particular demographic category (for example, Site), all subsequent demographic groups associated with Site will inherit the learning plan assignment and the learning plan assignment information (such as passing threshold and due date). Learning plan assignments that are inherited from another demographic group are indicated in gray, and the source demographic group for the inherited requirement is indicated in parentheses after the course title. You can make an inherited learning plan assignment more stringent (for example, by entering a higher passing threshold or earlier completion date), but you will not be able to specify less stringent requirements.

Note: Learning plan assignments made at the individual level take precedence over all group assignments made to a user for the same course. Therefore, it is possible to make a learning plan assignment less stringent for a user at the Individual learning plan assignment level. For more information, see Stringency Rules.

Example:

John Doe is an office administrator in a Houston manufacturing facility. All Houston employees must complete Electrical Safety annually, as assigned through the demographic group "Houston". However, office employees only need Electrical Safety every 2 years. By editing the inherited Electrical Safety assignment at the Individual level for John Doe and setting the validity period to 2 years, he will only be required to complete the course every 2 years regardless of the annual requirement at the "Houston" level.

Removal of Prior Course Starts

Each Advanced Compliance site has a setting that is used to identify and remove old course starts. The number of days is configurable. By default, all sites are set to 3 years, but you can contact your Skillsoft representative to request a different period of time. The purpose of this feature is to prevent the "linking" of old course starts to new, more stringent course requirements. A process runs nightly to check for any course start (never completed) older than the specified time period, and these starts are reset.

Example:

A user has Ergonomics Awareness assigned as "optional" in 2014 and starts the course at that time. In 2015, the course becomes required for that individual. It would not be wise for partial progress from over 3 years ago to be maintained. This course start would be removed by the nightly processor at the point of expiration determined by the setting in Advanced Compliance.

Editing Demographic Group Due Dates and Learning Assignments

Editing Demographic Group Due Dates

When editing a Recurring by Completion Date (RCD) requirement for a demographic group, due dates for users will be calculated from their previous completion date using the validity period specified by the administrator. If the validity or recurring period is modified, users' next due dates are recalculated accordingly. If the recurring period is increased, making a user's previous completion valid for the new period, the previous completion will be removed from history and re-linked to the current open requirements.

When editing a Recurring by Due Date (RDD) requirement for a demographic group, due dates for users are based on the specified calendar date. Users who have completed the learning plan assignment will retain their current completion and associated due date until the next assignment comes due. Based on the number of days specified for the course to be made available for retraining, the completed learning plan assignment will be moved to history and a new requirement added to the user's learning plan with the due date specified.

Note: All users in Initial Training are not affected by changes to the Assignment Type due dates unless the recurring period is modified in such a way that the user's previous completion, if one exists, becomes valid. Otherwise, users in Initial Training maintain due dates set by the Initial Training parameters. Modifying the values for Initial Training will update the due dates for all users in Initial Training.

Editing Demographic Group's Learning Plan Assignment Info (due date doesn't change)

When an administrator edits any learning plan assignment field other than the due date, users who have not completed the learning plan assignment or who have not begun training will automatically receive the new learning plan assignment information. Those users who have completed the training will receive the newly established assignment information upon retraining.

Create a Learning Program

To create a learning program

1. Click **Content > Learning Programs** on the navigation bar.
2. On the Learning Programs page, click **Add**.
3. On the Add/Edit Learning Program Info page, enter the learning program information in each field (if applicable):

Field	Description
Course Title	Enter the learning program title as you want it to display in the learning plan.
Course Number	If you use a numbering system to catalog your learning program, enter the learning program number.
Library	Enter the learning program category (for example, Human Resources, Ethics, or Environmental, Safety and Health).

Version	Enter a version number to help you track the most recent version of the learning program.
Delivery Method	Indicates that this is a Learning Program (LP). You cannot edit this field.
Date Added	Displays the date the learning program was added.
CEU	Specify Continuing Education Units (CEUs) that may be earned for completion of this learning program. CEUs are included in .csv versions of the Training Status, Exemptions/Equivalencies, and Completions Only reports for Users and Groups.
Cost	If you track cost for learning program, enter the cost for the user to complete the learning program here. Cost is shown on the Training Status report.
Estimated Duration	Enter the estimated time to complete this learning program.
Objectives	Enter the learning objectives for the learning program.
Intended Audience	Enter the target audience for this training.
Description	Enter a brief description of the learning program.
Approved Date	Enter the date the learning program was approved. This allows you to keep track of the most recent version of the learning program.
Equivalency	If you select **No** for equivalencies, equivalencies cannot be assigned for this learning program for any reason.
Exemption	If you select **No** for exemptions, exemptions cannot be assigned for this learning program for any reason.
Client Drivers	Enter any procedures or policies that relate to this learning program.
Related Drivers	Enter all related procedures or policies related to this learning program.
Primary Drivers	Enter all regulatory drivers related to this learning program.
Author	Enter the name of the author or owner of the learning program content.

4. Click **Save and Add Content**.

   The Edit Learning Program Content page displays.

5. In the left pane, in Course Catalog Types, select the course type you want to use, either **All**, **WBT Courses**, or **Non-WBT Courses**.

6. To search for a course, enter a full or partial course title in **Filter by Course Title**.

7. Select a course title, then click **ADD**. The course title displays under the title of the learning program.

8. Continue adding courses as needed.

9. Click **Save**.

10. In the right pane, in Completion Requirements:

    a. Select **Complete All** or **Complete All in Order**.

    b. If desired, enter a value (in hours) in **Minimum Time Spent**.

NOTE: If a folder is selected, **Complete All** or **Complete All in Order** applies to the courses in the folder.

11. (Optional) To create multiple folders for Learning Program contents:

    a. Click **New Folder**, then enter a folder name.

    b. Select **Complete All**, **Complete All in Order**, or **Optional**.

    c. Click **Save**.

NOTE: Courses included in a Learning Program share the same training requirement information (such as Date Due, Passing Threshold, and Validity set at the time of assignment).

Edit a Learning Program's Contents

You cannot edit the completion requirements or content of a learning program that is currently assigned to a user or group.

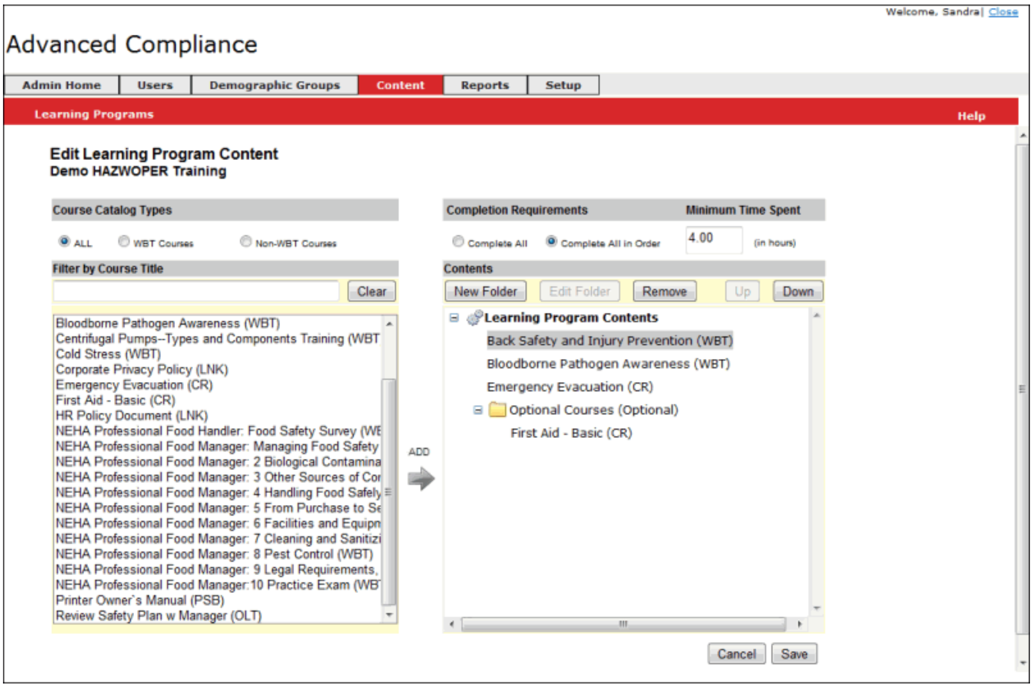
To edit contents of a learning program

1. Click **Content > Learning Programs** on the navigation bar.

2. In the Learning Program list, select the radio button next to the learning program you want to edit.

3. Click **Edit Contents**.

   The Edit Learning Program Content page displays. The contents of the selected learning program display in the right pane.



4. In the right pane, in Completion Requirements:
    a. Select the completion criteria, either **Complete All** or **Complete All in Order**.
    b. If desired, enter a value (in hours) in **Minimum Time Spent**. This value is the minimum amount of time that must be spent in this learning program in order to meet the completion requirements.
5. To create a new folder:
    a. Click **New Folder**.
    b. In **Folder Name**, enter a name for the folder.
    c. Select the folder completion criteria, either **Complete all items**, **Complete all items in order**, or **Optional items**.
    d. Click **Save**.
6. To add a course to the learning program:
    a. In the right pane, click the folder to which you want to add a course.
    b. In the left pane, select the desired course, then click **Add**.
7. To edit folder contents:
    a. Click the folder name, then click **Edit Folder**.
    b. Modify the folder name and completion options as desired, then click **Save**.
8. To delete a course or folder, click the course or folder name, then click **Remove**.
9. To change the order of a course or folder in the list of Learning Program Contents, click the course or folder name, then click **Up** or **Down**.
10. Click **Save**.

Copy a Learning Program

If an existing learning program closely resembles the desired program, you can copy the existing program and modify its contents as needed.

To copy a learning program

1. Click **Content > Learning Programs** on the navigation bar.

    The Learning Programs page displays.
2. In the Learning Programs list, select the radio button next to the learning program you want to copy.
3. Click **Copy**.

    The Add/Edit Learning Program Info page displays.
4. Modify the learning program properties as desired. Fields displayed in gray cannot be edited. For more information about the properties, refer to Create a Learning Program.
5. Click **Save & Add Content**.

    The Edit Learning Program Content page displays.

6. Edit the learning program's contents, as desired.
7. Click **Save**.

Inactivate a Learning Program

When a learning program is inactivated, it is removed from all learning plan assignments.

To inactivate a learning program

1. Click **Content > Learning Programs** on the navigation bar.

   The Learning Programs page displays.
2. In the Learning Programs section, select the radio button in the left hand column next to learning program you want to inactivate.
3. Click **Inactivate**.

   A message displays informing you that all assignments for the learning program will be removed and the learning program will no longer display in the list on the Learning Programs page.
4. To inactivate the learning program, click **OK**.

Content

You can view the Library listing of all courses available to your Advanced Compliance feature set, and also add non-Web-based (non-WBT) training course titles that can be assigned as learning plan assignments. For example, you can add a video title or classroom training as a learning plan assignment.

You can also do the following:

- Create a **Learning Program**, assign courses to it, and designate completion requirements, such as Complete All, Complete in Order, and Minimum Duration. A learning program can consist of multiple folders, each with its own completion requirements.
- Create **Prerequisites**, which allow you to make assignments to be completed in a certain order. You can create a collection of learning assets with a defined structure and completion criteria.
- Designate **Equivalent Courses**. Equivalent Courses are defined so that when one course is completed, the requirement for the equivalent course is marked with an EQ (equivalency) and removed from the user's Learning Plan.

Library

The library contains a list of all training courses (Web-based training (WBT) and non-WBT) as well as information on each course in your Advanced Compliance site. This feature provides a convenient method to create additional courses, links to documents, or other assets that may be offered to your users through a delivery method other than the Web. For example, you can add a video title or classroom training to the library so you can assign it as a learning plan assignment. In addition, you can edit existing course information.

To access the library, click **Content > Library** on the navigation bar.

To search the library, enter the search criteria in the **Filter Course Titles** field, then click **Filter**. You can enter a full course title, a partial title, or partial words.

View Course Information

To view course information

1. Click **Content > Library** on the navigation bar.

   The Library page displays.

2. In either the Non-WBT Courses list or the WBT Courses list, select the radio button in the left hand column for the desired course.

3. Click **Course Info** to display the course information.

Edit Course Information

To edit course information

1. Click **Content > Library** on the navigation bar.

   The Library page displays.

2. In either the Non-WBT Courses list or the WBT Courses list, select the radio button in the left hand column for the desired course.

3. Click **Edit Course**.

4. On the Add/Edit Course page, edit the course information. Refer to Add a New Course to the Library for a description of each field.

   Note: Depending on the course type, certain fields will be disabled and cannot be edited.

5. Click **Add**.

Add a New Course to the Library

You can add a new course, with a non-WBT delivery method, to the library. For example, you can add company procedures, video titles, or classroom training, and then assign the content as part of your learning program.

Note: Courses added to a non-WBT library will not utilize the SCORM or AICC standards. To communicate with the Advanced Compliance system, completions must be entered by the administrator or uploaded through an import process. For courses with an HTML link delivery method, users can confirm that the course was accessed to achieve a completion.

To add a new course to the library

1. Click **Content > Library** on the navigation bar.

2. In the Non-WBT Courses section, click **Add Course to Library**.

3. On the Add/Edit Course page, enter the course information in each field (if applicable):

Field	Description
Course Title	Enter the title as you want it to display in the learning plan.
Course Number	If you use a numbering system to catalog your courses, enter the course number.
Library	Enter the course category (for example, Human Resources, Ethics, or Environmental, Safety and Health).
Version	Enter a version number to help you track the most recent version of the course.
Delivery Method	Indicate the course training method, such as video, classroom, or CD. If you add a course with delivery method **HTML Link,** you can also specify a URL which the user can launch from his learning plan.
Link to this URL	Displays for delivery method **HTML Link** only. If the course delivery method is **HTML Link**, enter the URL that users should be directed to from the learning plan.
Completion Dialogue	For HTML links, there are three options: ▪ **Manual Entry**: Course completions may be entered by the administrator, just as other non-WBT completions are entered. ▪ **Completion Dialogue**: The user is presented with a dialog box after the HTML content is displayed. The user can either **Confirm** that he has reviewed the material or **Cancel** to exit without generating a completion. If the user confirms review of the material, a completion is automatically created for that HTML link and the link is moved to the completed section of the user's learning plan. ▪ **Do not show Completion Dialogue**: The course is marked complete immediately after the user launches the link, and no confirmation dialog box is shown.
Date Added	Displays the date the course was added to the library.
CEU	Specify Continuing Education Units (CEUs) that may be earned for completion of this course. CEUs are included in .csv versions of the Training Status, Exemptions/Equivalencies, and Completions Only reports for Users and Groups.
Cost	If you track cost for courses, enter the cost for the user to complete the course here. Cost is shown on the Training Status report.
Estimated Duration	Enter the estimated time to complete this course.
Objectives	Enter the learning objectives for the course.

Intended Audience	Enter the target audience for this training.
Description	Enter a brief description of the course.
Approved Date	Enter the date the course was approved. This allows you to keep track of the most recent version of the course.
Equivalency	If you select **No** for equivalencies, equivalencies cannot be assigned for this course for any reason.
Exemption	If you select **No** for exemptions, exemptions cannot be assigned for this course for any reason.
Client Drivers	Enter any procedures or policies that relate to this course.
Related Drivers	Enter all related procedures or policies related to this course.
Primary Drivers	Enter all regulatory drivers related to this course.
Author	Enter the name of the author or owner of the course content.

1. Click **Add**.

Inactivate a Course
You can only inactivate non-WBT courses. When a course is inactivated, it is removed from all learning plan assignments, learning programs, and prerequisites.

To inactivate a course

1. Click **Content > Library** on the navigation bar.

   The Library page displays.

2. In the Non-WBT Courses section, select the radio button in the left hand column next to the desired course.

3. Click **Inactivate Course**.

4. When the message displays asking if you want to continue, click **OK**.

Completion Criteria

A course's completion status is checked when results are posted to the Skillport database. This typically occurs when a learner finishes a session and closes a course. The learner's results are compared to the course's completion criteria to determine the course's completion status. A course is either COMPLETE (the learner has met the criteria) or STARTED (the learner has started the course but not yet met the criteria).

You can define global (company-wide) and course-specific completion criteria for Advanced Compliance courses.

Set Global Completion Criteria

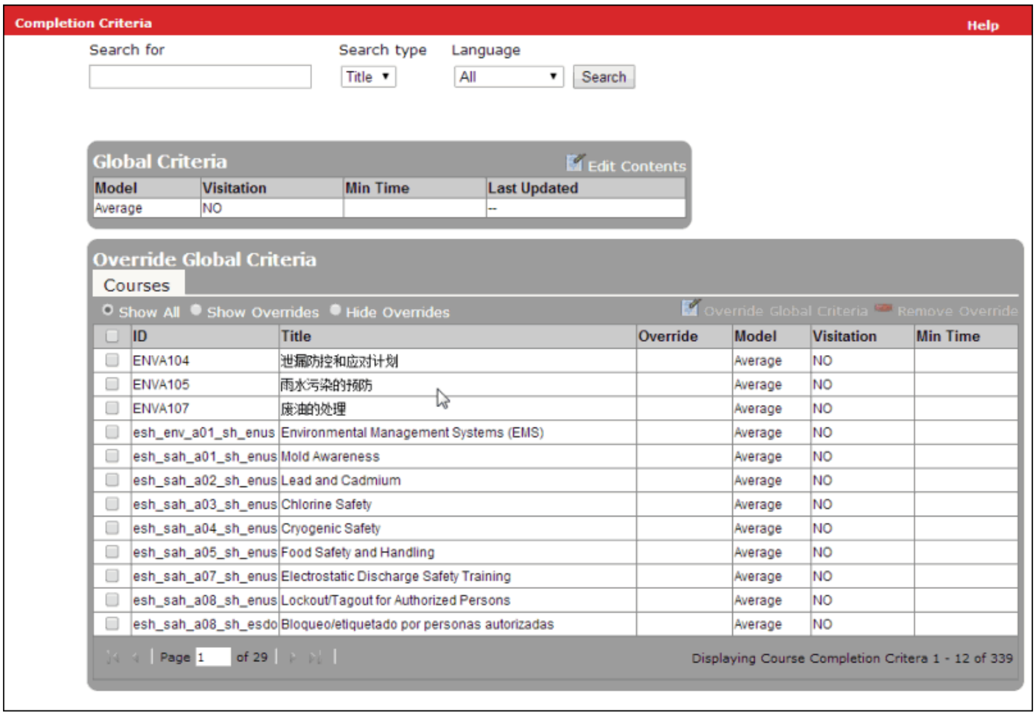
You can set global (company-wide) completion criteria that learners must meet in order to complete any course in the Advanced Compliance Library.

Note: If you have also set course-specific completion criteria for one or more courses, the course-specific criteria supersede the global criteria.

To set global completion criteria

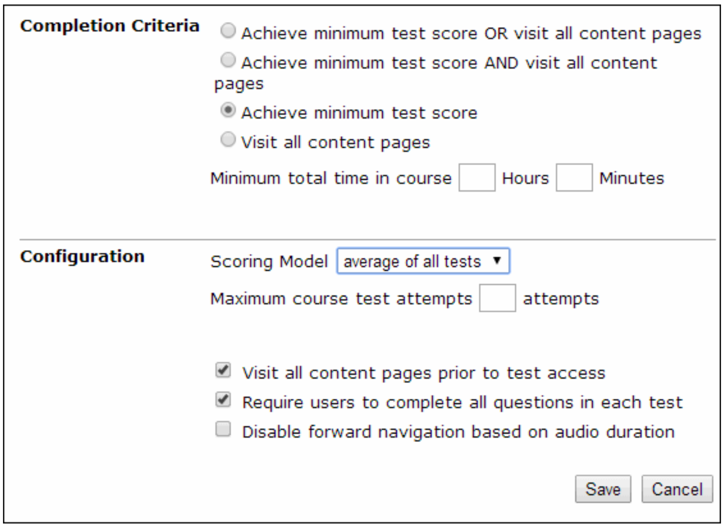
1. Click **Content > Completion Criteria** on the navigation bar.

   The Completion Criteria page displays.



2. In the **Global Criteria** section, click **Edit Contents**.

The Completion Criteria dialog box displays.



3. Change the completion criteria as needed. For help with this step, see Completion Criteria Settings.

4. Click **Save**.

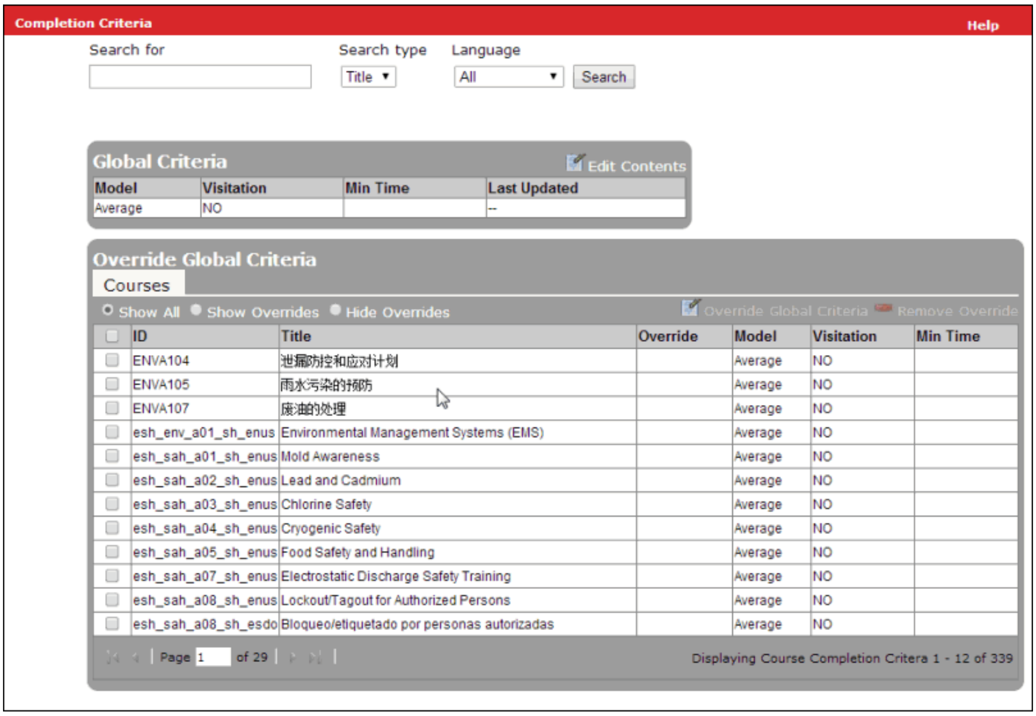
5. Contact Skillsoft Technical Support and request that your company's database be re-summarized.

Set Course-Specific Completion Criteria
You can set course-specific completion criteria that learners must meet in order to finish one or more specific Advanced Compliance courses. Course-specific criteria overrides global criteria.

To set course-specific completion criteria

1. Click **Content > Completion Criteria** on the navigation bar.

The Completion Criteria page displays.



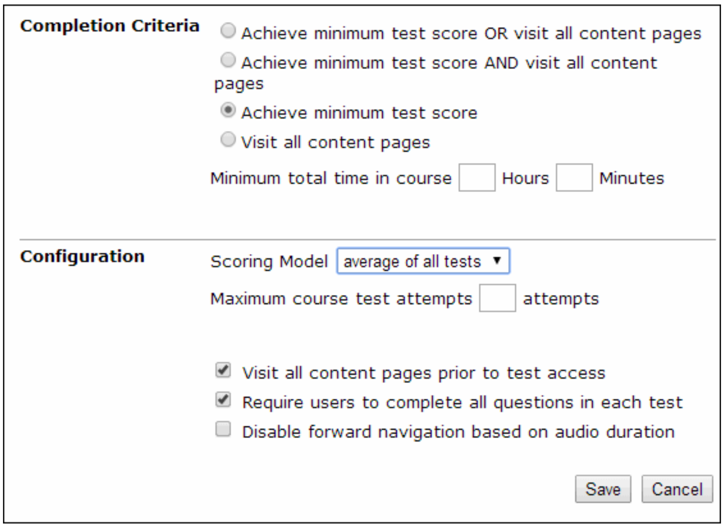
2. In the Override Global Criteria section, locate the desired course(s).

   You can use the sorting options in the Override Global Criteria section to locate the course. You can also use the search fields at the top of the page. Only search categories for asset types for which completion criteria can be set are shown.

3. Select the check box next to each desired course.

4. Click **Override Global Criteria**.

   The Override Global Criteria dialog box displays.



5. Change the criteria as needed. For help with this step, see Completion Criteria Settings.

6. Click **Save**.

7. If there are existing course completions that have not yet been preserved (frozen), you are prompted to confirm that you want to change the criteria. Click **OK** to confirm, or click **Cancel** to discard the changes.

8. Contact Skillsoft Technical Support and request that your company's database be re-summarized.

To remove course-specific completion criteria

1. Click **Content > Completion Criteria** on the navigation bar.

   The Completion Criteria page displays.

2. In the Override Global Criteria section, select the check box next to each course for which you want to remove course-specific completion criteria.

3. Click **Remove Override**, and then click **OK**.

4. If there are existing course completions that have not yet been preserved (frozen), you are prompted to confirm that you want to change the criteria. Click **OK** to confirm, or click **Cancel** to discard the changes.

   The selected courses revert to using the defined global (company-wide) criteria.

5. Contact Skillsoft Technical Support and request that your company's database be re-summarized.

Completion Criteria Settings
You can configure the following completion criteria settings for Advanced Compliance courses.

Completion Criteria: Specify one of the following visitation criteria and, if desired, the minimum time duration.

- **Visitation**
  - **Achieve minimum test score OR visit all content pages**: Learners can satisfy the **Minimum test score** and scoring model criteria OR page through all topics, whichever comes first.
  - **Achieve minimum test score AND visit all content pages**: Learners must satisfy the **Minimum test score** and scoring model criteria AND must page through all topics.
  - **Achieve minimum test score**: Content visitation is ignored. Learners must satisfy the **Minimum test score** and scoring model criteria.
  - **Visit all content pages**: Learners must page through all topics. The **Minimum test score** and scoring model criteria is ignored.

  If the course cannot be completed because there are no assessments or because of passive content, do not specify **Achieve minimum test score AND visit all content pages** or **Achieve minimum test score**.

- **Minimum total time in course**: Specify the minimum time duration (in hours and/or minutes) the learner must spend in the course to achieve completion. The Hours value must be an integer between 0 and 99, and the Minutes value must be an integer between 0 and 59. The default value is blank (no minimum specified).

Configuration: Specify one or more of the following configuration options.

- **Scoring Model**: The scoring model is the logic to apply when determining completion. There are 2 scoring models:
  - **Each Test** (lesson scoring): In order for the learner to complete the course, each lesson test must have a high score that meets or exceeds the value specified for **Minimum test score**.
  - **Average** (course scoring): In order for the learner to complete the course, the average of all lesson test scores must meet or exceed the value specified for **Minimum test score**. Tests that have not been attempted are scored as 0.
- **Maximum course test attempts**: Allows you to specify the maximum number of attempts allowed for a learner to take a course test; after the maximum attempts is reached, the learner can request a course retake. You can enter an integer value from 1 - 99, or leave the field blank (unlimited attempts).
- **Visit all content pages prior to test access**: When selected, prohibits the learner from directly accessing the test without first completing all the pages in the course.
- **Require users to complete all questions in each test**: If you select this option, all questions must be answered in all tests in order to complete a course.

  When this option is selected, either **Average +** or **Each Test +** displays in the Model column in the Override Global Criteria list.
- **Disable forward navigation based on audio duration**: When selected, the forward navigation for course pages is not enabled until the audio portion of the current page has completed and prevents the audio portion from being muted.

Note: After you make changes to completion criteria, you must call Skillsoft Technical Support and request that your Skillport database be **re-summarized**. This updates the completion criteria, updates the summary data for all applicable courses, and reevaluates learners' completion status on all applicable courses based on the new criteria.

However, if you do not want the changes to the completion criteria to affect learners who have already completed affected courses (based on the old completion criteria), first you must 1) freeze existing completions of the courses, and then 2) request that Skillsoft Technical Support re-summarize your Skillport database. Once this is done, you can change the completion criteria.

Reset Course Test Attempts

You can reset a course when a user has reached the maximum number of test attempts specified in the course completion criteria. The user must have the course reset to take the test again. You can also reset a course that is assigned to a demographic group.

To reset a course test attempt for a user

1. Click **Users > Test Attempt Reset** on the navigation bar.

   The Test Attempt Reset page displays.

2. To search for the user by **Last Name**, enter the first letter(s) of the last name.

   Or, use the drop-down menu to select a different search criteria.
3. Click **Find**. A list of users matching your search criteria displays.
4. Click the desired user name from the list. A list of courses requiring a reset are displayed.
5. Click the **Action** check box next to the course you want to reset.
6. In the Test Attempt Reset dialog box:
   a. Review the course information.
   b. If desired, add a **Note**.
   c. Click **Save**.

To reset a course test attempt for a demographic group

1. Click **Demographic Groups > Test Attempt Reset** on the navigation bar.

   The Test Attempt Reset page displays.
2. In **Course**, select the learning plan assignment you want to reset.
3. If desired, select additional demographic criteria.
4. Click **Submit**.
5. Click the **Action** check box next to the course you want to reset.
6. In the Test Attempt Reset dialog box:
   a. Review the course information.
   b. If desired, add a **Note**.
   c. Click **Save**.

Set the Player Logo

You can modify the appearance of the Skillsoft Course Player (SCP) by uploading a custom logo or image.

Note: The custom logo image specified in the Advanced Compliance Admin applies only to Advanced Compliance-assigned courses.

To set the player logo for Advanced Compliance-assigned courses

1. Click **Content** > **Player Logo** on the navigation bar.
2. In **Skillsoft Course Player Logo**, select either option:
   - **Use standard image**: Displays the Skillsoft logo in the upper left corner of the SCP.
   - **Use custom image**: Displays your custom logo image in the upper left corner of the SCP.

3. For **Use custom image**, click **Choose File** to browse for the desired file, then click **Upload** to upload the image.

Note: Recommended image dimensions are 62 pixels wide and 23 pixels high. Files are limited to 1.5 MB and jpeg formats only.

4. Click **Save**.

Prerequisite Courses

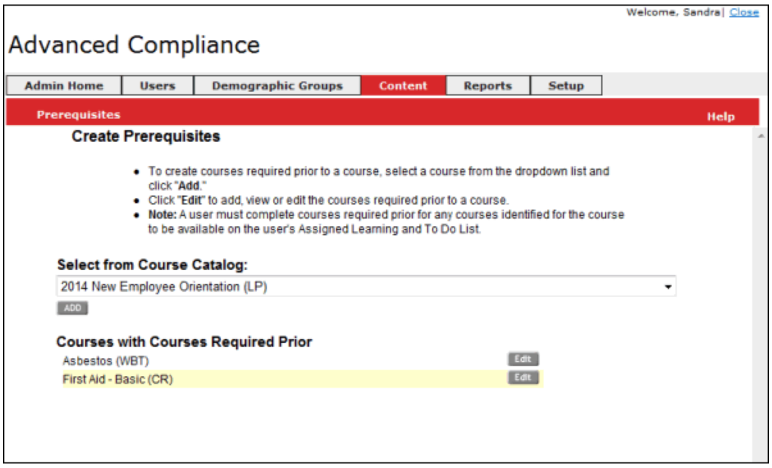
Prerequisites allow you to specify assignments to be completed in a certain order. You can create a collection of learning assets with a defined structure and completion criteria.

Create Prerequisites

To create prerequisites

1. Click **Content > Prerequisites** on the navigation bar.

   The Create Prerequisites page displays.



2. In the **Select from Course Catalog** drop-down list, select the course that should be completed last.

3. Click **Add**.

4. In the **Select a Course required prior to <selected course>** drop-down list, select the course that should be completed prior to the previous course.

5. Click **Add**.

6. If the completion of the previous course is a prerequisite for the completion of the selected course, select the **Due Date of <Course Name> Based on Completion Date of selected course** option.

7. To add additional courses as prerequisites, repeat steps 4 through 6.

8. Click **Done** when you are finished adding courses.

Edit Prerequisites

To edit prerequisites

1. Click **Content > Prerequisites** on the navigation bar.

   The Create Prerequisites page displays.

2. In the **Courses with Courses Required Prior** list, click **Edit** next to the prerequisite you want to edit.

3. To add additional courses, select the course from the **Select a Course required prior to <course name>** list, then click **Add**.

4. To delete a course, click **Delete** next to the course name in the **Courses Required Prior to <course name>** list.
5. Click **Done**.

Equivalent Courses

You can designate equivalent courses so that when one course is completed, learners receive credit for the requirement after completing a different course. When a learner completes a web-based training (WBT) course or is granted a completion for a non-WBT, any equivalent course is marked with a status of EQ (equivalency) and is removed from the learner's Learning Plan.

Note: For equivalent courses to apply to a learner, the learner must have assignments for both courses. A learner will not receive an equivalency automatically for any course not assigned to him, even if an equivalency relationship exists between the courses.

Equivalency Direction

Uni-directional (-->): When the first course selected is completed, an equivalency is generated for the equivalent course(s). However, if the second course (or courses) is/are completed first, it will not generate an equivalency for the first course.

Bi-directional (<-->): When either course is completed, an equivalency is generated for the other course(s).

Courses may be equivalent to more than one course, and in those cases, a completion for any of the courses results in EQs for all others in the group. However, EQs assigned automatically by the system for a course which has other equivalent courses do not result in EQs for the additional courses. This prevents "cascading" equivalencies.

Example 1

Back Safety is equivalent to *Ergonomics Awareness* and *Office Ergonomic*s. *Ergonomics Awareness* is equivalent to *Back Safety* and *Computer Ergonomics*.

A learner completes *Back Safety*. This learner will receive an EQ for *Ergonomics Awareness* and *Office Ergonomics*, but not for *Computer Ergonomics*.

An equivalency or exemption assigned manually by an administrator on the Assign Exemptions and Equivalencies page functions the same as a completion, and any course set as equivalent will also be marked with an EQ.

Example 2

Back Safety is equivalent to *Ergonomics Awareness* and *Office Ergonomics*. *Ergonomics Awareness* is equivalent to *Back Safety* and *Computer Ergonomics*.

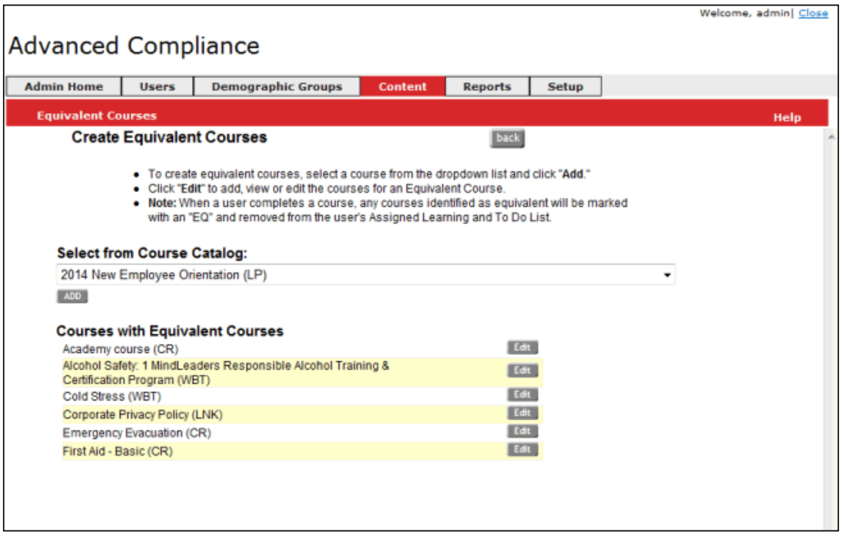
An administrator grants a learner an Exemption for *Back Safety*. This learner will receive an EQ for *Ergonomics Awareness* and *Office Ergonomics*.

Create Equivalent Courses

To create equivalent courses

1. Click **Content > Equivalent Courses** on the navigation bar.

The Create Equivalent Courses page displays.



2. In the **Select from Course Catalog** drop-down list, select the course title for which you want to create equivalent courses.

3. Click **Add**.

4. On the Equivalent Courses page:

   a. Select the equivalent course title from the drop-down list.

   b. Select the equivalency direction, either uni-directional or bi-directional.

   c. Click **Add**.

5. Repeat step 4 to specify additional equivalent courses.

6. Click **Done** to return to the Create Equivalent Courses page.

Any course with an associated equivalent course displays in the Courses with Equivalent Courses list at the bottom of the page.

Note: When a course is set as equivalent to another, any user with an existing completion for either course will immediately receive an equivalency (EQ) for the second course.

Edit an Equivalent Course

To edit an equivalent course

1. Click **Content > Equivalent Courses** on the navigation bar.

2. On the Equivalent Courses page, in the **Courses with Equivalent Courses** list, click **Edit** beside the desired course title.

3. To add an associated equivalent course:

   a. Select the equivalent course title from the drop-down list.

   b. Select the equivalency direction, either uni-directional or bi-directional.

   c. Click **Add**.

4. To delete an equivalent courses, click **Delete** next to the desired course name in the Courses Equivalent to <Course Name> list.

5. Click **Done**.

Delete an Equivalent Course
You can delete a course from its associated equivalent course.

To delete an equivalency

1. Click **Content > Equivalent Courses** on the navigation bar.

2. On the Create Equivalent Courses page, in the **Courses with Equivalent Courses** list, click **Edit** next to the desired course title.

   The Edit <Course Name> Equivalent Courses page displays, with a list of equivalent courses for the selected course.

3. Click **Delete** beside the equivalent course(s) you want to remove.

4. Click **Done**.

Note: If an equivalent course is deleted, any users who have been granted an EQ for that course as a result of completing the equivalent course will retain his equivalency.

Exemption and Equivalency Expiration

An equivalency (EQ) assigned to a learning plan assignment expire upon the learning plan assignment due date.

Exemptions (EX) expire on the date specified by the administrator. Upon expiration, the learning plan assignment is displayed on the user’s Learning Plan under Current Training with a new due date equal to the previous due date + the "valid-for" period or the calendar-based (RDD) due date.

If the learning plan assignment has been defined as one-time-only training, the EX/EQ never expires.

Questionnaires

The Questionnaire tool is a powerful resource for creating compliance-related questionnaires, surveys, and policy certifications, all supported by the robust administrative functionality of Advanced Compliance. After a user submits the questionnaire, it is reviewed and optionally commented on. When creating a questionnaire, certain questions can be marked as variant. This enables the reviewer to receive a notification when a user submits a non-standard answer.

Administrators can:

- Create and edit a questionnaire
- Assign a questionnaire to a user or demographic group
- Review a user's answers to a questionnaire and make comments
- Run a questionnaire report for a user or demographic group

Create a New Questionnaire

Note: While creating a questionnaire, click **Save Draft** periodically to save it as a draft without activating it. Questionnaires cannot be assigned unless they have been activated.

To create a new questionnaire

1. Click **Content > Questionnaires**.

   The Questionnaires page lists all the questionnaires you have created.

2. On the Questionnaires page, click **New Questionnaire**.
3. Specify information about the questionnaire.
4. Click the **Info** tab.
5. Enter information in the fields as described below:

Field	Description
Name	Enter a unique name for the questionnaire. This is a required field.
ID	Displays the questionnaire ID. This value cannot be modified.
Title	Enter the title you want to display in the learning plan. This is a required field.
Questionnaire Number	If you use a numbering system to catalog your questionnaires, enter the questionnaire number.

Version	Displays the version number of the questionnaire. When you first create a questionnaire, it is automatically assigned version 1. Each time you edit and save the questionnaire, the version increments automatically (version 2, version 3, and so on). Versioning helps track the historical records of users who have taken this questionnaire. When you run a report, you can see which users took which version of the questionnaire.
Author	Enter the name of the author or owner of the questionnaire content.
Reviewer Email	Enter the email address of the person who will review user responses to the questionnaire.
Created On	Displays the date the questionnaire was created. This value cannot be modified.
CEU	Specify Continuing Education Units (CEUs) that may be earned for completion of this questionnaire.
Cost	If you track cost, enter the cost for the user to complete the questionnaire. Cost is shown on the Training Status report.
Estimated Duration	Enter the estimated time to complete this questionnaire.
Library	Select the questionnaire category from the drop-down list (for example, **Human Resources** or **Food Safety**).
Delivery Method	Displays how the questionnaire is delivered to the user. This value is **Web-based Training** and cannot be modified.
Objectives	Enter the objectives for the questionnaire.
Description	Enter a brief description of the questionnaire.
Intended Audience	Enter the target audience for the questionnaire.
Primary Drivers	Enter all regulatory drivers related to this questionnaire.
Client Drivers	Enter any procedures or policies that relate to this questionnaire.
Related Drivers	Enter all related procedures or policies related to this questionnaire.
Exemption	By default, exemptions are allowed. If you select **Disallow Exemptions**, exemptions cannot be assigned for this questionnaire for any reason.
Equivalency	By default, equivalencies are allowed. If you select **Disallow Equivalencies**, equivalencies cannot be assigned for this questionnaire for any reason.
Policy Explanation	Enter the text to display to the user before they begin taking the questionnaire.
Policy Document	Identifies the policy for the user to review that is associated with the questionnaire. Either enter the URL to the policy or click the link to upload the document. You can only upload PDF files less than 10 MB.

Standard Completion Message	Enter the text to display to the user after he has submitted his questionnaire responses.
Variant Completion Message	Enter the text to display to the user if he has submitted any variant responses. This completion message will display instead of the standard completion message.

6. Click **Save Draft**.
7. Add questions and answers to the questionnaire.
8. Click the **Questions** tab.
9. To add a question, click the icon.
10. Click the **Click here to edit this question** link.
11. In the Question {N} Properties dialog box, specify the following information:
    - **Number**: If you have multiple questions, use this property to reorganize the order of the questions.
    - **Response**: Select whether or not the response is **Required** or **Optional**. By default, every question is required.
    - **Response Type**: Select the method for responding to the question, either **Checkbox** (user can select multiple choices from a list), **Multiple Choice** (user can select only one response from a list), or **Text Response** (user can write his own response).
    - **Max Checks (Optional)**: If using the **Checkbox** response type, enter the maximum number of choices the user can select.
    - **Question**: Enter the question text.
12. Click **Apply**. The question displays on the **Questions** tab.
13. Click **Add Answer**.
14. Click the **Click here to edit this answer** link.

    The Question {N}, Answer {N} Properties dialog box displays.
    - **Number**: Use this property to reorganize the display order of the answers.
    - **Notify Reviewer**: Enables you to determine if this response is a variant response. Select **No** if this response is standard (no email notification is sent). Select **Yes** if this response is non-standard (an email notification will be sent to the reviewer).
    - **Answer Options**: Specify further actions to take when the question is answered, either **None** (no further actions required), **Create a series of follow-up questions** (more questions will need to be answered), or **Request further explanation** (
    - **Answer**: Enter the text for the answer to the question.
15. Click **Apply**.

The answer displays below the question on the **Questions** tab.

16. If applicable, click the icon to add a follow-up question.

17. To add more answers, click **Add Answer** and repeat steps 7 through 9.

18. To add more questions, click the icon either above or below the current question, depending on how you want to order the questions.

19. Click **Save Draft**.

20. Specify how the questionnaire will look when printed.

21. Click the **Print Options** tab.

    - To add a page break before or after a question, click the corresponding **Click to Force Page Break** button. You may want to do this, for example, if a question prints on a separate page than the answers.

    - For questions with text responses, click the icon to add an additional line for text or click the X icon to remove a line.

22. Click **Save Draft**.

23. Click **Save & Activate**. The questionnaire displays in the list on the Questionnaires page and is ready to be assigned.

Edit an Existing Questionnaire

To edit an existing questionnaire

1. Click **Content > Questionnaires**.

2. On the Questionnaires page, select the desired questionnaire from the list.

3. Click **Edit**.

4. Modify the information as desired.

> **Note:** You cannot edit the **ID**, **Version**, and **Delivery Method**. You can edit the **Name** *only* if the questionnaire has not yet been activated.

5. Click **Save & Activate**.

Assign a Questionnaire

You can assign a questionnaire to a user or a demographic group. Once assigned, the questionnaire displays in the user's Learning Plan and is launched in the same manner as a course.

To assign a questionnaire to a user

1. Click **Users > Learning Plan Assignments**.

2. To search for the user by **Last Name**, enter the first letter(s) of the last name.

   Or, use the drop-down menu to select a different search criteria.

3. Click **Find**. A list of users matching your search criteria displays.

4. Click the desired user name from the list.

   The Individual Learning Plan Assignments page displays.

5. In **Select from Library**, click **Questionnaire** to filter the library to show only questionnaires.
6. Select the questionnaire from the list.
7. Click **Add**. The questionnaire assignment is added to the user's learning plan.

To assign a questionnaire to a demographic group

1. Click **Demographic Groups > Learning Plan Assignments**.
2. In the **Demographic Group(s)** list, click **Assign** for the desired group.

   The Learning Plan Assignments page displays.

3. In **Select from Library**, click **Questionnaire** to filter the library to show only questionnaires.
4. Select the questionnaire from the list.
5. Click **Add**. The questionnaire assignment is added to the learning plan for all users in the demographic group.

Review and Comment On a Questionnaire

If you have been assigned as a reviewer, you can review and make comments on submitted questionnaires. You will also receive an email notification when a user's response to a particular question has been flagged as variant.

To review a questionnaire for a user

1. Click **Users > Questionnaire Review.**
2. To search for the user by **Last Name**, enter the first letter(s) of the last name.

   Or, use the drop-down menu to select a different search criteria.

3. Click **Find**. A list of users matching your search criteria displays.
4. Click the desired user name from the list.
5. On the Questionnaire Review page, select the desired questionnaire, then click **View/Edit Comments**.
6. Review any variant responses, indicated by the icon.
7. To add a comment:

   a. Click the icon next to the response.

   b. In the Add a Comment dialog box, enter the desired text, then click **Add Comment**.

   The icon now displays next to the response.

8. To view/edit a comment:

   a. Click the icon next to the response.

   b. In the View/Edit Comment dialog box, edit the comment if desired, then click **Update**.

9. Click **Save Comments**.

Reports

Use the Reports functionality to view and print training records for individual users and demographic groups. For most reports, you can sort by user, or filter by demographics, status, or group by dates.

The Create a New Report page is organized by report types:

- Group Reports
- User Reports
- E-mail Notification Reports
- General Administrative Reports

To access reports, click **Reports** on the navigation bar.

Report Types

Group Reports
You can generate and view the following types of group reports from the Reports page:

Group Report, Completions Only
Run this report to view all training completed by a group of users. This report also includes training that was granted an exemption or equivalency. The filters available for this report are course title, course status, delivery method, demographic labels, training type, user status, and date. The groupings available for this report are course (default) and user. Output types available are web browser, .PDF, and .CSV (optionally, demographic labels may be included).

Note: If a date filter is specified for this report, the filter is applied to the users' completion dates.

Group Report, Exemptions/Equivalencies Only
Run this report to view exemptions and equivalencies issued to users. This report also includes the justification text entered for the exemptions and equivalencies. The filters available for this report are course title, course status, delivery method, demographic labels, training type, user status, and date. The groupings available for this report are course (default) and user. Output types available are web browser, .PDF, and .CSV.

Note: If a date filter is specified for this report, the filter is applied to the date the exemption or equivalency was granted.

Group Report, Training Status
Run this report to view the training status by a group of users. The report includes courses that are overdue, not started, in progress, and completed. This report also includes learning plan assignments that were granted an exemption or equivalency. The filters available for this report are course title, course status, delivery method, demographic labels, training type, training status, user status, and date. The groupings available for this report are course (default) and user. Output types available are web browser, .PDF, and .CSV (optionally demographic labels may be included).

Note: If a date filter is specified for this report, the filter is applied to the users' due dates. Not-started optional course assignments are not returned in this report.

User Reports
You can generate and view the following types of user reports from the Reports page:

Note: You can also run user reports from the User Information page.

User Report, Completions Only
Run this report to view all training completed by an individual user. This report also includes training that was granted an exemption or equivalency. The filters available for this report are course title, course status, delivery method, demographic labels, training type, user status, and date. The groupings available for this report are alphabetical by course title or sorted by completion date. Output types available are web browser, .PDF, and .CSV.

Note: If a date filter is specified for this report, the filter is applied to the user's completion dates.

User Report, Exemptions/Equivalencies Only

Run this report to view exemptions and equivalencies issued to users. This report also includes the justification text entered for the exemptions and equivalencies. The filters available for this report are course title, course status, delivery method, demographic labels, training type, user status, and date. The groupings available for this report are alphabetical by course title or sorted by completion date. Output types available are web browser, .PDF, and .CSV.

Note: If a date filter is specified for this report, the filter is applied to the date the exemption or equivalency was granted.

User Report, Training Status

Run this report to view all training completed by an individual user. The report includes courses that are overdue, not started, in progress, and completed. This report also includes learning plan assignments that were granted an exemption or equivalency. The filters available for this report are course title, course status, delivery method, demographic labels, training type, training status, user status, and date. The groupings available for this report are alphabetical by course title or sorted by completion date. Output types available are web browser, .PDF, and .CSV.

Note: If a date filter is specified for this report, the filter is applied to the user's due dates. Not-started optional course assignments are not returned in this report.

Learning Plan Assignments by User

Run this report to view a list of learning plan assignments associated with user. The learning plan assignments are further identified by delivery method, valid period, passing threshold, test-out, test-out threshold, pretest, required/optional, original due date, assignment type (RCD/RDD), due date (for RDD requirements), retraining due date, and group where assignment was made. Output types available are web browser, .PDF, and .CSV.

User Report, Learning Plan

Run this report to view a list of learning plan assignments associated with user. The learning plan assignments are further identified by delivery method, valid period, passing threshold, test-out, test-out threshold, pretest, required/optional, original due date, and assignment type (RCD/RDD).

Email Notification Reports

Data for email reports are maintained for 6 months. Reports may be filtered for a shorter time period (for example, those sent in the past 7 days), but data older than 6 months cannot be returned and viewed in reports.

You can generate and view the following types of email notification reports from the Reports page:

User Report, Email

Run this report to view a list of all emails sent to a user. You can filter by email type and by period of time (for example, sent in last 7 days). This report includes email title, user name, user ID, user email address, date the email was sent, and if the email is recurring. Output types available are web browser, .PDF, and .CSV.

Group Report, Email

Run this report to view a list of emails sent to a group of users. You can filter the list by user status, email type, period of time and job function. This report includes email title, user name, user ID, user email address, date the email was sent and if the email is recurring. Output types available are web browser, .PDF, and .CSV.

Supervisor Report, Email

Run this report to view a list of emails sent to supervisors. You can filter this report by period of time. This report includes email title, email address of the supervisor, date the email was sent, and if the email is recurring. Output types available are web browser, .PDF, and .CSV.

Administrator Report, Email

Run this report to view a list of emails sent to administrators. You can filter this report by period of time. This report includes email title, email address of the administrator, date the email was sent, and if the email is recurring. Output types available are web browser, .PDF, and .CSV.

Invalid Email Report

Run this report to view all emails flagged as "failed" due to an invalid or malformed email address. You can correct email addresses for users, supervisors, or administrators identified here by clicking **Email Notifications > Address Mgmt**. Output types available are web browser, .PDF, and .CSV.

General Administrative Reports
You can generate and view the following types of general administrative reports from the Reports page:

Equivalent Courses (Web Only)

Run this report to view a list of equivalent courses.

Unused Demographics (Web Only)

Run this report to view a list of demographics that have not been assigned to users or used to create demographic groups.

Demographics Summary (Web Only)

Run this report to view a list of demographic categories and demographic names.

Users by Demographic

Run this report to view a list of users associated with a demographic or several demographics. The users are identified by User ID, name, and user status.

User Information Report

Run this report to view all information associated with a user including User ID, security level, email address, supervisor's email address, user status, and associated demographics. The filters for this report are demographics and user status. Output types available are web browser, .PDF, and .CSV.

Learning Plan Assignments by Demographic

Run this report to view a list of learning plan assignments associated with each demographic group at any given time. The learning plan assignments are further identified with delivery method, required/optional, initial training period, assignment type (RCD/RDD), due date (for RDD requirements), passing threshold, test out, test out threshold, pre-test, and group where assignment was made. The filters for this report are course title and demographic labels. Output types available are web browser, .PDF, and .CSV.

Users with Individual Learning Plan Assignments (CSV only)

Run this report to view the learning plan assignments that were made on an individual basis. This report is only available in a .CSV format. Each learning plan assignment is identified with UserID, user name, course ID, course name, delivery method, validity (in days), passing threshold, test-out, test-out passing threshold, pre-test, required/optional, original due date, assignment type (RCD/RDD), whether it was assigned as a group or individual requirement, group where it was assigned (if applicable), and whether the group or individual assignment is most stringent (if applicable).

Learning Plan Assignments Summary (CSV only)

Run this report to view a list of training assignments by demographic names.

Completion Summary by Demographics for Required Courses (CSV Only)

Run this report to view completion summary data for required courses associated with each defined demographic group.

Prerequisites (Web Only)

Run this report to view the prerequisites which include the selected courses.

Questionnaire Reports

You can generate and view the following types of questionnaire reports from the Reports page:

User Report, Questionnaire Results

Run this report to view all questionnaire responses completed by an individual user. The filters available for this report are questionnaire title, response type (all responses or variant responses only), and due date. Output types available are web browser, .PDF, and .CSV.

Group Report, Questionnaire Results

Run this report to view all users who have completed the specified questionnaire(s). The filters available for this report are questionnaire title, response type (all responses or variant responses only), and due date. Output types available are web browser, .PDF, and .CSV.

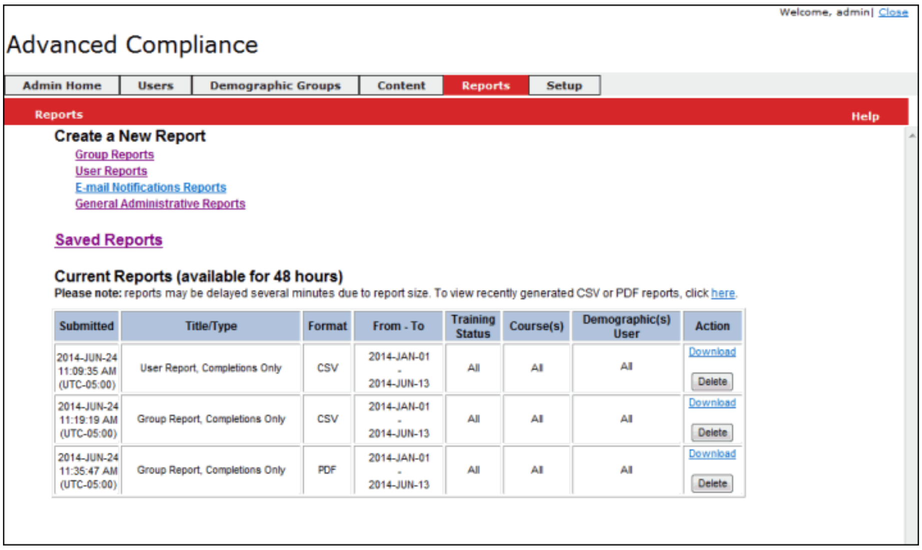
Create a Report

Note: Reports for an individual user can also be run from the User Information page.

To create a report

1. Click **Reports** on the navigation bar.

   The Create a New Report page displays.



2. Click the desired report category to display the list of available reports.

3. Click the report you want to create.

4. On the <Report Name> page, specify the desired filter criteria needed to run your report query. The fields vary depending on the selected report.

5. In **Output**, select how you want the report displayed:

   - **Web Browser**: Displays the report in your web browser for immediate viewing.

   - **PDF**: Displays the report in PDF format that may be viewed in your browser using the Adobe Reader plug-in.

- **CSV**: Displays the report in a comma-delimited format that may be uploaded into data management applications, such as Microsoft Excel. If desired, select the **With demographics** option to include user demographics in the report output.

6. (Optional) To save the report, enter a name in **Report Title**, then click **Save Report**.
7. Click **Run Report**.
8. If the selected output is **Web Browser**, the report displays immediately on the Reports page.
9. If the selected output is **PDF** or **CSV**, the Report Generation page displays.
    a. Click **Back to Reports** to access the report. The report information displays in the Current Reports section.

    Note: Depending on the file size, PDF and CSV report outputs may take several minutes to download. All report queries requested in PDF or CSV format remain on the Reports page for 48 hours.

    b. To view a report, click the **Download** link in the Action column for the desired report.

    c. To delete a report, click **Delete** in the Action column for the desired report, then click **OK** in the message that displays.

Saved Reports

For many report types, you can save search criteria.

- To save a report type, enter a title for your report in **Report Title**, then click **Save Reports**.
- To view your saved reports, click **Saved Reports** on the Reports page.

  A list of saved reports displays, with options to run, edit, and delete them.

Report Types

The Compliance Reporting Dashboards enable administrators to display, manage, and customize compliance training program details.

The dashboards provide a customizable graphical display of training data, such as training program health, training assignments and asset assignments, allowing administrators to quickly analyze metrics and monitor the overall health of their compliance training program.

Administrators can:

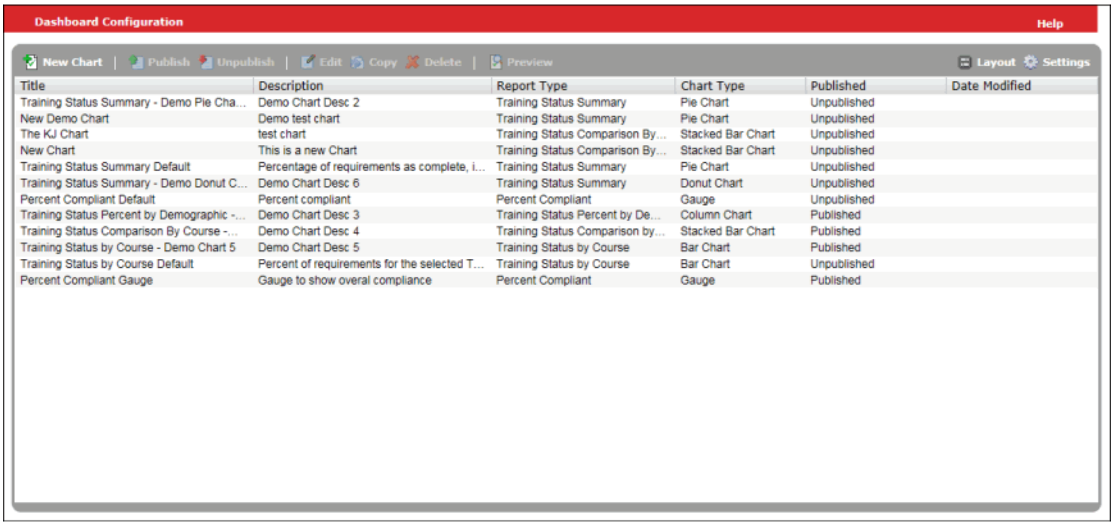
- Customize data views with multiple chart options.
- Print or export detailed data in a variety of report formats.
- Filter on a variety of parameters allowing for user flexibility when creating, saving, and modifying custom graphics.
- Quickly gain insight into the key performance indicators that support your organization's training initiatives.
- Specify filters for summarized reports on a variety of fields to include your demographic categories and content types.
- Assess training status by monitoring assigned training, completions, overdue courses, and equivalencies.

Note: The Reporting Dashboards feature is only available if it has been enabled on your site.

Configuring the Dashboard

The first time you launch the dashboard, it displays default charts in a default layout. You can subsequently customize it to meet your needs. Use the Dashboard Configuration page to create and edit charts, configure dashboard settings and layouts, and publish or unpublish charts.

To access this page, click **Reports > Dashboard Configuration** on the navigation bar.



Title	Description	Report Type	Chart Type	Published	Date Modified
Training Status Summary - Demo Pie Cha...	Demo Chart Desc 2	Training Status Summary	Pie Chart	Unpublished	
New Demo Chart	Demo test chart	Training Status Summary	Pie Chart	Unpublished	
The KJ Chart	test chart	Training Status Comparison By...	Stacked Bar Chart	Unpublished	
New Chart	This is a new Chart	Training Status Comparison By...	Stacked Bar Chart	Unpublished	
Training Status Summary Default	Percentage of requirements as complete, i...	Training Status Summary	Pie Chart	Unpublished	
Training Status Summary - Demo Donut C...	Demo Chart Desc 6	Training Status Summary	Donut Chart	Unpublished	
Percent Compliant Default	Percent compliant	Percent Compliant	Gauge	Unpublished	
Training Status Percent by Demographic -...	Demo Chart Desc 3	Training Status Percent by De...	Column Chart	Published	
Training Status Comparison By Course -...	Demo Chart Desc 4	Training Status Comparison by...	Stacked Bar Chart	Published	
Training Status by Course - Demo Chart 5	Demo Chart Desc 5	Training Status by Course	Bar Chart	Published	
Training Status by Course Default	Percent of requirements for the selected T...	Training Status by Course	Bar Chart	Unpublished	
Percent Compliant Gauge	Gauge to show overal compliance	Percent Compliant	Gauge	Published	

Create a New Chart

To create a new chart

1. On the Dashboard Configuration page, click **New Chart**.
2. In the Create New Chart dialog box:
    a. Enter a **Name** for the chart. This field is required and is the name that displays on the dashboard above the chart.
    b. (Optional) Enter a **Description** of the chart.
    c. In **Report Type**, select the report you want to create.

        A description of the selected report displays below the **Report Type** field.
    d. Select the **Chart Type**.
    e. Click **Next**.
3. Click **Save**.

    The chart displays on the Dashboard Configuration page as an unpublished chart. To include the chart on your dashboard, publish the chart.

Edit a Chart
You can edit an existing chart to modify the name, description, report type, and filter selections. The edited version of the chart is saved as a copy; however, the Published/Unpublished status of the edited chart remains unchanged. Charts can be edited from either the Dashboard Configuration page and the My Dashboard page.

To edit a chart

1. From the Dashboard Configuration page:
   a. Click **Reports > Dashboard Configuration** on the navigation bar.
   b. Select the desired chart in the list, then click **Edit**.
2. From the My Dashboard page:
   a. Click **Reports > My Dashboard** on the navigation bar.
   b. Click ▾ in the upper-right corner of the desired chart, then click **Edit**.
3. In the Edit Chart dialog box, modify the desired chart details.
4. Click **Next**.
5. Modify the demographic filter selections as desired, then click **Next**.
6. Modify the assignment filter selections as desired, then click **Next**.

   A preview of the modified chart displays.
7. Click **Save**.

Copy a Chart
You can save a copy of an existing chart by renaming it with a new title. The copied chart will initially have a status of Unpublished, regardless of the status of the chart from which it was copied.

To copy a chart

1. Click **Reports > Dashboard Configuration** on the navigation bar.
2. On the Dashboard Configuration page, select the desired chart from the list, then click **Copy**.
3. In the **Copying** dialog box, specify a new **Name** for the chart copy.
4. Click **Copy**.

   The chart copy displays in the list.

Delete a Chart
You can no longer edit or publish a chart to your dashboard once you have deleted it. You must recreate the chart if it is subsequently needed.

To delete a chart

1. Click **Reports > Dashboard Configuration** on the navigation bar.
2. On the Dashboard Configuration page, select the desired chart from the list.
3. Click **Delete**.

4. When the message displays asking if you are sure you want to delete the chart, click **Yes**.

Publish or Unpublish a Chart
In order for a chart to display on the dashboard, you must publish it. You can publish a maximum of six charts at one time.

If you want to remove a chart from displaying on the dashboard, you can unpublish it. Unpublished charts remain in the list on the Dashboard Configuration page and can be re-published at any time.

To publish a chart

1. Click **Reports > Dashboard Configuration** on the navigation bar.

   The Dashboard Configuration page displays with a list of charts that have been created.

2. Select the chart that you want to publish, and click **Publish**.

   The chart status in the Published column changes from Unpublished to Published.

To unpublish a chart

- From the Dashboard Configuration page:
  i. Click **Reports > Dashboard Configuration** on the navigation bar.
  ii. Select the chart you want to unpublish.
  iii. Click **Unpublish**.
- From the My Dashboard page:
  i. Click **Reports > My Dashboard** on the navigation bar.
  ii. Click ✖ in the upper-right corner of the desired chart.

The chart status in the Published column changes from Published to Unpublished.

Configure Dashboard Settings
You can specify settings to display your dashboard as the default Administrator landing page and reset the dashboard to the default view.

To configure the dashboard settings

1. Click **Reports > Dashboard Configuration** on the navigation bar.
2. On the Dashboard Configuration page, click **Settings**.

   The Dashboard Settings dialog box displays.

3. Specify the settings as desired:
   - **Login to My Dashboard**: This option is selected by default. When selected, your customized dashboard displays as the landing page when you log in to the administrator tasks.
   - **Reset Dashboard**: Select this option to reset the dashboard to the default configuration. Any custom charts you have published to the dashboard will be unpublished, and the layout will be reset.
4. Click **Save**.

Configure Dashboard Layout
You can customize your dashboard by using one of several available layouts that are based on the number of currently published charts.

To configure the dashboard layout

1. Click **Reports > Dashboard Configuration** on the navigation bar.

   The Dashboard Configuration page displays.

2. Click **Layout**.
3. In the Dashboard Layout dialog box, click **Edit**.
4. In the **Select a layout** section, click the desired layout. The available layouts depend on the number of published charts.

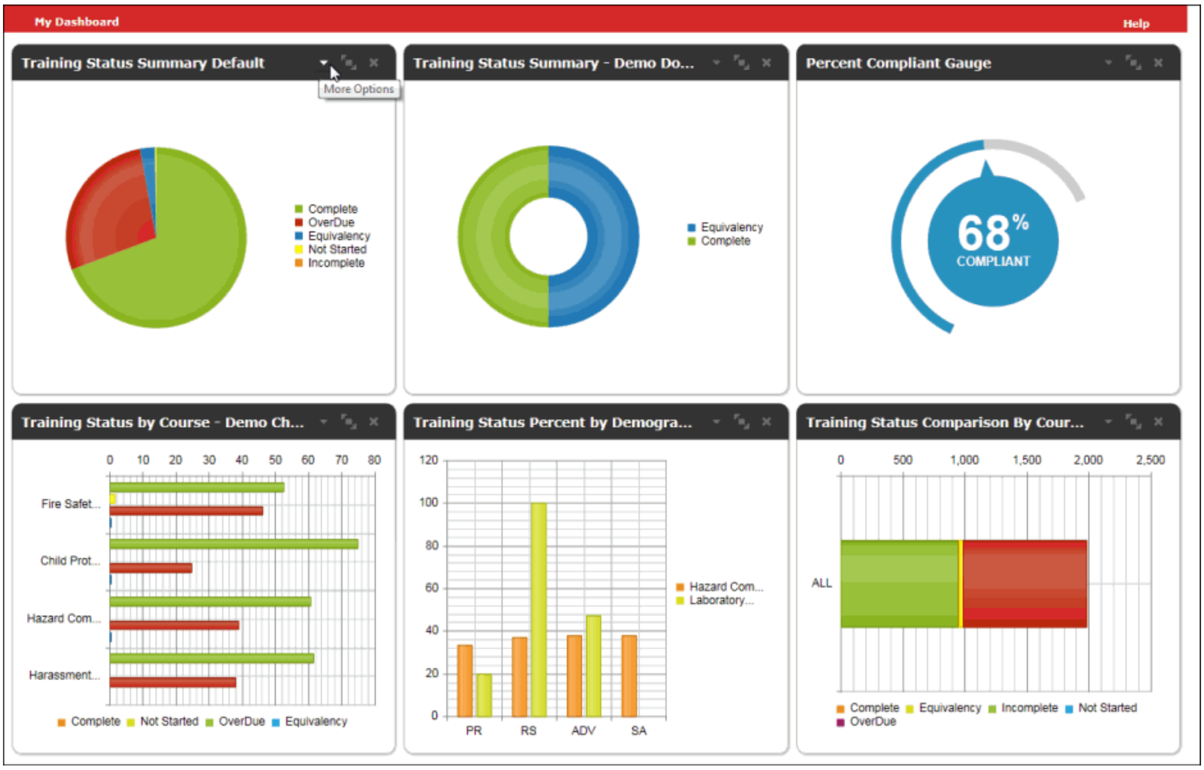
   A template of the layout displays.

5. From the list of your published charts, drag and drop each chart to the desired position in the template.
6. Click **Save**.

Working with the Dashboard

Use the My Dashboard page to view compliance training program data, edit charts, export charts as image files, and print charts.

To access this page, click **Reports > My Dashboard** on the navigation bar.



View Chart Data

You can view the data used to create an individual chart.

To view chart data

1. On the My Dashboard page, click in the upper-right corner of the desired chart.
2. Click **View All Data**.

   The chart data displays in a tabular format. You can view data such as user ID, name, course title, training status, due date and completed date. Each column in the spreadsheet can also be filtered using several different search criteria.
3. To view additional pages of the chart data, use the navigation buttons (First Page, Previous Page, Next Page, and Last Page) below the table.
4. Click in the upper-right corner for options to edit the chart, view the chart, or export the data to a CSV file.
5. To return to the dashboard view, click in the upper-right corner.

Expand a Chart to Full Screen

To expand a chart

1. Click **Reports > My Dashboard** on the navigation bar.
2. On the My Dashboard page, click in the upper-right corner of the desired chart.

   The chart displays in full-screen mode. In this mode, you can click in the upper-right corner to edit the chart, view the chart data, export it as an image, or print the chart.
3. Click to condense the chart and return to the dashboard view.

Display Drill Down Chart Information

Depending on the chart type, you can display the chart data for a selected section of the chart.

To display drill down chart information

1. Click **Reports > My Dashboard** on the navigation bar.
2. On the desired chart, click on the desired section of the chart.

   The chart data displays in tabular format.
3. Click in the upper-right corner of the table to return to the dashboard view.

Export a Chart as an Image

You can save a chart that is displayed on the dashboard as a .png image file.

To export a chart as an image

1. Click **Reports > My Dashboard** on the navigation bar.
2. On the My Dashboard page, click in the upper-right corner of the desired chart, then click **Export as Image**.
3. In the Save As dialog box, browse to the location where you want to save the file.
4. In **File name**, specify a different file name if you do not want to use the default name.

   The default name is the chart title with the date appended to it.
5. Click **Save**.

Export Chart Data to a CSV File

You can export detailed chart data to a file in .csv format.

To export chart data

1. Click **Reports > Dashboard** on the navigation bar.
2. On the My Dashboard page, click in the upper-right corner of the desired chart, then click **View All Data**.

   The chart data is displayed in tabular format.
3. Click in the upper-right corner of the table, then click **Export CSV**.

   You can either open the CSV file to view now or save the file to the desired location. The default file name is the chart name with the date and time appended to it. All chart data is included in the CSV file, not just the data that is currently displayed in the table.

Print a Chart

To print a chart

1. Click **Reports > Dashboard** on the navigation bar.
2. On the My Dashboard page, click ▾ in the upper-right corner of the chart you want to print.
3. Click **Print Chart**.
4. In the Print dialog box, select the desired options, then click **Print**.

Setup

Use the Setup functionality to specify whether to use the automatic email notification system and to designate access levels for each of the administrative functions.

Initial Setup

The Initial Setup page allows you to specify whether or not you want to use the email notification system. If you activate the system, you can then configure it to send email notifications to learners, learners' supervisors, and the Administrator. If the system is not activated, no email notifications will be sent.

To specify email notification system option

1. Click **Setup > Initial Setup** on the navigation bar.

   The Initial Setup page displays.

2. To activate the email notification system, select **Yes** in **Do you want to use the email notification system?**.

3. If you do not want to activate the email notification system, click **No**.

4. Click **Submit**.

   For information about creating custom emails, refer to Create and Edit a Custom Email.

Security Setup

The Security Setup option allows you to designate levels of access for each Advanced Compliance administrative page or function.

There are four security access levels associated with Advanced Compliance: User, Manager, Administrator, and Company Administrator.

Note: A security access level is based on the user’s role as defined in Skillport. To change a user’s security access level in Advanced Compliance, you must change that user’s role in User Management in the Skillport Administrator.

For each administrative function, there are two levels of access:

- **Read Only:** Allows the user to view a specific page or function, but the user is not permitted to make entries or edit existing information.

- **Read/Change:** Allows the user to view the page and create or edit entries.

A *demographic delimiter* enables you to limit what data is viewable by administrators. If you choose to use a demographic delimiter, administrators who have a security level at or below the selected level will only have access to users with the same demographic label as the administrator.

To specify security access levels

1. Click **Setup > Security Setup** on the navigation bar.

   The Security Setup page displays.

2. To specify which security access levels can view the administrative functions menu, select the corresponding check box in the Admin Menu column in the **Currently Defined Security Levels** section.

3. To change the security access to a specific page or function, in the **Assign Security Level to a Page or Function** section:

    a. Select the lowest security access level of Read Only access for the desired page or function.

    b. Select the lowest security access level of Read/Change access for the desired page or function.

    Note: You cannot set the Read/Change access to a security access level lower than what is set for Read Access.

4. To change the demographic delimiter:

    a. In **Security level to which delimiting applies**, select the desired security access level from the drop-down list.

    b. In **Demographic to use as filter**, select the desired demographic category from the drop-down list.

5. Click **Submit**.

Email Notifications

Email Types

The available email types are described below. Depending on the email type, certain fields can be customized. See Customizable Email Fields for more information.

Initial Training Notice

The initial training notice sends an email to users who have the **Send Email to User** option set to **Yes** and have an email address configured in their User Information profile. Initial Notices are sent each night to users who had new learning plan assignments added to their requirements on the previous day. The email includes the course(s) that have been assigned and when the courses are due.

Overdue Training Notice

The overdue training notice sends an email to users who have the **Send Email to User** option set to **Yes** and have an email address configured in their User Information profile. Overdue Training Notices are sent each night to users who had learning plan assignments become overdue on the previous day. The email includes the overdue course(s) and the course due date(s). Click **Edit** to view the Overdue Training Notice configuration page.

User Welcome Notice

The User Welcome notice sends an email to users who have the **Send Email to User** option set to **Yes** and an email address configured in their User Information profile. User Welcome notices are sent to users on the night after they are added and also to users added in the past 60 days who have not already received a Welcome notice. The email includes the web address (URL), the User ID, and password. The notice also includes instructions for accessing the learning plan, launching a course, and Customer Service contact information.

Custom User Email – Non-recurring/Recurring

You can create custom emails for users, either recurring or non-recurring. Users who receive a custom email are determined by the distribution list criteria. For recurring and non-recurring emails, schedules are based on a calendar date and recurrence interval. All users who meet the distribution criteria within the period specified (for example, due within 90 days) will receive the email.

Custom User Email – Training Status

Training reminder emails for users are similar to recurring user emails. However, the frequency on which the email is sent is based on the user, not a calendar schedule. For example, a Training Status email set for "Due in 90 days" will email each user due in exactly 90 days.

Example

John Doe has Back Safety due 1/31/2014 and Asbestos Awareness due 2/15/2014. Jane Doe has Back Safety due 3/1/2014. For a Training Reminder email set to email any user with a course due in 90 days, emails will be sent to these users on the following dates:

John Doe, Back Safety: 11/2/2013
Jane Doe, Back Safety: 12/1/2013
John Doe, Asbestos Awareness: 11/17/2013

Supervisor User Status Report

This standard email will send notices to supervisors every 2 weeks, summarizing the training status for users reporting to them. The email text, sort order, schedule, and start date are configurable. The report includes users with courses due in 30 days, overdue, and completed in the past 30 days.

Custom Supervisor Email – Non-recurring/Recurring

You can create custom administrator emails, either recurring or non-recurring. The administrators who receive custom emails are determined by the list of administrators entered in the target recipients list on the distribution list page. You can enter up to 25 administrator addresses for each custom email. The users summarized in the email may be further filtered in the Distribution List settings.

Custom Administrator Email – Training Reminder

Training Reminders for Administrators are similar to custom recurring Administrator emails. However, the frequency that the email is sent is based on the due dates of the users in the distribution list settings, not a calendar schedule. For example, a Training Reminder email set for "Due in 90 days" will send an email to the administrators in the Target Recipient list summarizing each user who is due in exactly 90 days from the email send date.

Custom Supervisor Email – Non-recurring/Recurring

You can create custom supervisor emails, either recurring or non-recurring. The supervisors who receive custom emails are determined by the distribution list settings for the email. The supervisors of all users who meet the distribution criteria will receive the message.

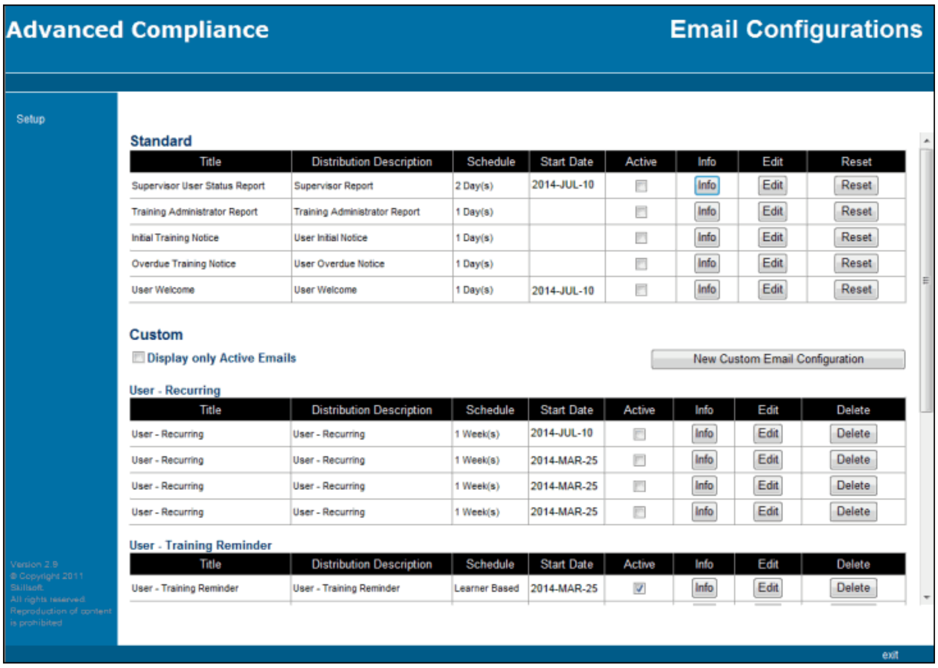
Training Administrator Report

The standard Training Administrator Report sends summary reports in .csv format to all Advanced Compliance administrators. By default, any user with security level 10 is included in the distribution list. This list may be edited manually by clicking **Edit** beside the Training Administrator configuration in the Standard table on the main Email Configuration page. Summary reports include all Advanced Compliance users who have courses due in 30 days, are overdue, or have completed courses in the past 30 days. Because these reports have the potential to be quite large, they are included as .csv attachments to the emails.

Email Notifications

You can configure the Email Notification System to send email notifications to the learner, the learner's supervisor, and the Administrator.

To access the Email Notifications window, click **Setup > Email Notifications** on the navigation bar.



The table below shows the standard emails and the associated distribution.

Email Title	Distribution Description
Initial Training Notice	User
Overdue Training Note	User
User Welcome	User
Supervisor User Status	Supervisor
Training Administrator Report	Administrator

You can also create custom emails for users or supervisors. Available custom email types include:

- User - Recurring
- User -Training Reminder
- User - Non-Recurring
- Supervisor - Recurring
- Supervisor - Non-Recurring
- Administrator – Recurring
- Administrator – Training Reminder

Recurring emails are sent on a specified frequency (such as twice per month or weekly). Non-recurring emails are a one-time email event sent to a group of users or supervisors.

Create a Custom Email

To create a custom email

1. Click **Setup > Email Notifications** on the navigation bar.
2. On the Email Configurations page, click **New Custom Emails Configuration**.
3. Select the custom email type.
4. Click **Next**.
5. Click **Edit** beside the email name.
6. On the Content page, enter an email title for custom email types to help you identify the email configuration at a later time. This title displays in the email list on the Email Notifications page. You can also edit the **From Name**, **Data Sort Order**, and **Email Text** on this page.

   Email titles for the standard emails cannot be customized.
7. Click **Next** to display the Distribution List page.
8. For custom user and supervisor emails, enter a new **Distribution List Title** as a reminder of the group you are selecting. You can determine who receives the email by filtering on course title, course status, user status, training type, due date, assigned date, and demographic. The default distribution list is all required courses not started or incomplete, for active users due within 90 days.

   Available filters include:

   - **Course Title:** To filter the list by course assignment, click the desired course title in the left-hand column, and click the ">" arrow button to move the courses to the Selected column. You can select multiple courses at the same time by holding the Ctrl key and clicking each title. For emails filtered by course, only users who have those courses assigned will receive an email, and only the selected course titles will be summarized in the email report. For supervisor emails, only supervisors of the users meeting the distribution list criteria will receive the email.

     Note: Moving all courses using the double arrow ">>" button does not have the same effect as selecting the **All courses** check box. If new titles are added at a later time, the **All courses** option will include these new courses in the email distribution. When the ">>" button is used, only the titles in the list at that time will be used to determine the distribution.

   - **Course Status:** You can also filter the distribution list by course status: Not Started or Incomplete; Not Started, Incomplete, Complete, or Overdue.
   - **User Status:** You can elect to send the email to active users only, both active and inactive users, or inactive users only.
   - **Training Type and Date:** You can select the email to only be sent to users who have the course(s) specified as required, optional or both. Likewise, you can filter the list by due date or assignment date.

Note: If the emails are set for users with both optional and required courses, the due date filter is not applied to the optional course assignments. Therefore, any user with the specified course(s) assigned as optional will receive the email, even if a "Due Within" filter is applied.

If you select "Due Within," the email will be sent to users who have the course due any time during the period specified here (for example, "Due within 30 days."). If **Next** is selected, the distribution list is filtered for users with courses due in the future. If **Last** is selected, the list is filtered for users who are overdue, or who had the course "Due within the past X days".

Note: When "Due Within the past X days" is selected, only users with overdue training will be returned.

If you select "Assigned Within", the distribution is filtered based on the date the course was assigned to the user. Here, only **Last** will return users, and **Next** is not applicable. For example, users who have had the course "Assigned Within the Last 30 days" will receive the email.

To add all overdue training records to the distribution list, regardless of how the email has been configured, select the **Include ALL overdue courses** check box.

- **Demographics:** You can further filter the distribution list by selecting certain demographics. Only users who meet all the demographics specified will receive the email.

9. Click **Next** to display the Schedule page.
10. Enter the date you want the emails to start, and for recurring emails, the frequency to send them.

Note: The frequency for standard user emails is not editable.

11. Click **Next** to display the Review Setup page to review the distribution list settings and schedule.
12. Click **Next** to display the Preview page to review the format and custom text of the email message.
13. Click **Done** to return to the Email Configuration page.
14. To activate the email, click the **Active** checkbox beside the new email configuration.

Note: Whenever you edit an email configuration, you must reactivate the email on the Email Configuration page.

Customizable Email Fields

Each email type has customizable fields and settings.

- **From Name:** The name to display in the **From** field in the email.
- **Subject:** The subject line of the email.
- **Data Sort Order:** The order of data in the report included in the email. The default sort order for each email is as follows:
  - **User emails**: Due Date, Course Title, Course Type
  - **Supervisor emails**: User Name, Due Date Descending, Course Title

  - **Administrator emails**: Supervisor Name, User Name, Due Date Descending, Course Title

  If desired, you can select an alternate sort order from the drop-down list:

  - **User emails**: Course Title, Due Date, Course Type
  - **Supervisor emails**: Course Title, Due Date Descending, User Name
  - **Administrator emails**: Supervisor Name, Course Title, Due Date Descending, User Name

- **Email Text:** There are two blank fields that you can use to display custom text in each email. Each field is limited to 2000 characters. Click in the empty field to begin entering your custom text. Click in the blank field at the end of the email to enter additional custom text.
- **Distribution List:** The audience who will receive the email. For Custom email types, this audience can be filtered by demographic, course title, user status, course due date, or course assigned date. If no users meet the criteria established in the distribution list settings, no emails will be sent.
- **Start Date:** The date on which an email will first process.
- **Email Frequency:** For recurring emails, the frequency at which the email will be sent.

The following table shows which of these fields can be customized for each email type.

Email Type	From Name	Subject	Data Sort Order	Email Text	Distribution List	Start Date	Email Frequency
Initial Training Notice	X	-	X	X	-	X	-
Overdue Training Notice	X	-	X	X	-	X	-
User Welcome	X	X	-	X	-	X	-
Supervisor User Status Report	X	-	X	X	-	X	X
Training Administrator Report	X	-	X	X	X	X	X
User - Recurring	X	X	X	X	X	X	X
User - Training Reminder	X	X	X	X	X	X	-
User - Non-recurring	X	X	X	X	X	X	X
Supervisor - Recurring	X	X	X	X	X	X	X
Supervisor – Training Reminder	X	X	X	X	X	X	-
Supervisor - Non-recurring	X	X	X	X	X	X	X
Administrator – Recurring	X	X	X	X	X	X	X

Administrator - Training Reminder	X	X	X	X	X	X	-
Administrator - Non-recurring	X	X	X	X	X	X	X

Edit Email Setup Options

To edit email setup options

1. On the main Email Configurations page, click **Setup** on the left-hand menu.
2. In **Number of Retry Attempts**, enter the number of retry attempts for any message the system deemed undeliverable. By default, the system will try to resend any email for seven days. Emails are flagged for resend if the system cannot create or send the message or if the nightly system fails at any point during processing.
3. In **Default Access URL**, specify the default URL you want included in emails. This is the URL to which the user is directed to log in.

   Note: If the default URL is changed, the URL in existing email configurations is not modified.

4. To have users receive emails in HMTL format, select the **Use HTML** check box.
5. To use the international date format in the emails, select the **Use International Date** check box.
6. Click **Submit**.

Advanced Compliance Glossary

A

Administrative Functions: Primary navigation features that allow the Administrator to set up and monitor Advanced Compliance users.

Assign Completions: A method to track learning plan assignments with a delivery method other than the Web (for example, video, classroom, CD, etc.).

Associated Document: A document that is designated as required reading for completion of course requirements. Once the document has been assigned as a learning plan assignment, users will be able to click on a link in the Learning Plan to access the document file.

C

Client Drivers: Policies and procedures within an organization that mandate training for employees.

Completion Record: A record of current completion or historical completion. The record is for one user, one course. When a user launches a course from the learning plan, a completion record is created. A current completion record may be either completed or started. A current completion record does not become "completed" until the user passes all exams or assessments.

Course Category: A broad description used to categorize courses in the Library option such as HR, Health and Safety, and Environmental.

Course Reset Date: Course reset date = date user completed course + valid-for period - 90 days.

Current Completion: A completion record, which is linked to a current requirement and, if completed, appears as a completed course both in the user's learning plan and on reports.

Current Requirement: A record signifying that this course is currently assigned to the user (regardless if the user has completed the course). A current requirement displays in both the user's Learning Plan and My Transcripts.

D

Delivery Method: The instructional method used to present course content (such as classroom, video, CBT, or CD).

Demographic: Information related to the organizational structure associated with a user (such as Job Function, Site, or Division). All reports and curriculum assignments are based on demographic categories.

Demographic Group: A category of users who share similar training needs. A demographic group must be defined prior to making a learning plan assignment.

E

Email Notification: A feature that allows automated email reminders and reports to be sent to users, their immediate supervisor, and the Administrator.

Equivalency: A credit awarded to a user for previous training, education, and/or work experience.

Exemption: The learning plan assignment is specifically removed (waived).

H

Historical completion: A completion record. An exemption/equivalency in history also qualifies as a historical completion. A completion is pushed into the historical table when 1) the completion expires and the course is ready for retraining, or 2) the learning plan assignment (and any path of inheritance for that course) is completely removed from the user or group.

Historical requirement: A record which may be a previous instance of a course for which the user still has a current requirement, meaning the user still has this course assigned to him but this instance was completed, expired and moved to history; or this may be a requirement previously assigned to the user and the learning plan assignment has been removed entirely from the user or the demographic group. For a requirement to be in history, there must be an associated completion or exemption/equivalency for that requirement. A historical requirement displays for a user only in My Transcript.

I

Inherited Learning plan assignments: If a learning plan assignment has been established for "All" members of a particular demographic category (for example, Site), all subsequent demographic groups associated with that particular site will inherit the learning plan assignment.

Initial Setup: A feature that guides the Administrator through decisions regarding user access to Advanced Compliance and the Automatic Email Notification System.

Initial Training: The first instance when a learning plan assignment is assigned, where the learning plan assignment's "valid-for" date is established as anything other than "one-time training". When an administrator assigns a course to a demographic group or user for the first time, it is considered initial training. A user may also receive initial training when a new requirement is assigned and all previous completions for that course are invalid (see Valid Completion).

Initial Training Decision: The option for assigning new or initial training. Options include calendar-date or "due within X days" from receiving the requirement.

L

Learner transcript: A user's listing of the history and status of all assets. By default, the Core Data transcript displays, which contains the complete history of all launched and/or completed self-assigned and manager-assigned assets.

Learning plan: A user's listing of all assigned courses (required and optional learning plan assignments).

Learning plan assignment (Individual): If a user has a unique learning plan assignment above and beyond or different from the requirements designated for a demographic group, training can be assigned to the user as required.

Learning plan assignment (Group): A course that is required for a group of users by virtue of their job task duties.

Learning Program: An administrative function that allows the administrator to assign a group of courses and designate completion requirements, such as complete all, complete in order, and minimum duration in hours. A Learning Program can have multiple folders assigned to it, each with its own completion requirements.

Library: A comprehensive directory of all available training courses as well as information on each course. The function provides a method to add or delete course titles to your online library.

N

New User: Any user added after learning plan assignments have been assigned to the demographic groups.

O

One-Time Training: One-time training never expires, and therefore is not considered retraining. One-time training will remain on the Learning Plan for one year following completion.

"Open for retraining" window: This is the period of time before a course is due in which a user can launch the course and create a completion record. X-days will be a configurable number for each TR.

OrgGroup info: The parameters set for a particular learning plan assignment When a new assignment is set, a record is created. The parameters set for this assignment (such as Initial Training decision, training type, required/optional, due date, validity period, test out, and passing threshold) are referred to as OrgGroup info.

P

Passing Threshold: The minimum test score allowed for successful completion of the learning plan assignment.

Pre-test: A comprehensive exam administered at the beginning of a course to establish a baseline score for post-test comparison to determine learning gains.

Primary Drivers: The main regulatory drivers for a course that mandate the training be provided (for example, OSHA).

Push completion to history: Move a current completion record to history. If the assignment is completed, the requirement and completion will be preserved in the historical tables and continue to show on the Training Status reports. If the completion is only a start (not completed), it and the requirement will be deleted in this process.

R

RCD: Recurring on Completion Date, equivalent to frequency-based training. Next due dates are calculated off last completion dates.

RDD: Retraining on Due Date, equivalent to calendar-based training. Next due dates are calculated off previous due dates. (for example, due 12/31/14, next due is 12/31/15).

Requirement: A training assignment; one course assigned to a user either through a demographic group or an individual Learning Plan assignment. A course assigned to a user results in a record. The term has no implication on required versus optional. An optional assignment is referred to as a requirement.

Restricted Access: An Initial Setup feature that allows the Administrator to control access to Advanced Compliance features. With this option, a user must be pre-registered before they are able to log in and generate a record. Restricted access requires the use of a User ID and password, which must be distributed to the user.

Resurrect completion: Extract a completed completion and its associated learning plan assignment record from the historical tables and make them current.

Retraining: Retraining is defined as any subsequent completion of the learning plan assignment following initial training. Retraining occurs as often as specified in the Learning Plan assignment's "valid-for" field and is dependent upon the user's completion date of initial training. Retraining due date = date user completed course + valid-for period.

S

Security Setup: Designated levels of access for each of the Advanced Compliance administrative functions.

T

Test-Out: A comprehensive test at the beginning of the course. If the user's score meets or exceeds the minimum passing threshold, they are not required to complete the course and will receive credit for the course.

Training Administrator: A person or people who have full unrestricted access to all the Advanced Compliance administrative functions.

U

User Status: Users have a status of either 1) Active or 2) Inactive.

V

Valid completion: A completion which, based on completion date, meets the criteria for a current requirement. This may be either a historical or current completion. A valid completion must be in the window between "today" (the day the user receives the learning plan assignment) and "today – valid for period."

For example, a completion for Back Safety on or after 12/1/2014 would be valid for a requirement for Back Safety due every 1 year, assigned on 12/1/2014. A completion on or before 11/30/2014 would not be valid for this requirement.

"Valid-for" Period: The period for which training is considered valid. Training expires after the "valid-for" period has elapsed.

Enrollments and Waivers

Learner Enrollment

You can enroll a learner into a learning program or Live Learning Course (LLC) in one of two ways:

1. Enroll the learner individually.
2. Enroll the group in which the learner is a member.

These enrollments are treated independently. If you enroll a group, and later withdraw a member of that group from the learning program or LLC, the rest of the group is unaffected. Also, if you enroll an individual learner, then enroll a group to which that learner is a member, the learner is not double-assigned.

Group Enrollment

Note the following:

- If you remove a learner from an enrolled group, he is automatically withdrawn from the learning program or LCC unless he has already completed it. No further steps need to be taken.
- If you remove a learner from an enrolled group, his completion data for the learning program or LCC (**In Progress** or **Completed**) remains in the system, even if he has not made any progress within it.
- If you add additional members to an enrolled group, those learners are automatically enrolled in the learning program or LCC.

  Exception: If you add a new subgroup directly under the ALL USERS group (visible only to Company Admins), those members are not automatically enrolled. You must enroll them individually, or add them to a different group.

Completion Status

Enrolling in a learning program or LLC is considered the first step of starting the program or course; as a result, the learning content is automatically displayed in the learner's learning transcript immediately upon enrollment. For more information about completion status, see Learning Program Completion Criteria.

Learning Programs within a KnowledgeCenter

If a learning program is used in a KnowledgeCenter roadmap, learners must be assigned and enrolled in the learning program before they can see it in the KnowledgeCenter. If they are not assigned, they will see an error message. If they are assigned but not enrolled, the learning program appears empty in the KnowledgeCenter roadmap details page.

Enroll Users or Groups

To enroll users or groups in a learning program or LLC

1. Access the current enrollments for the given program or course.
2. If you want to individually enroll users instead of enrolling an existing group (or groups), click the **Users** tab in the Current Enrollments pane on the right. Otherwise, leave the **Groups** tab active.

Note: The previous step is not strictly required. That is, if you drag and drop a set of users to the Groups tab (or a set of groups to the Users tab), the application detects this and automatically changes the tabs accordingly for you. However, it can be helpful to preview the existing list of enrolled groups or users before you enroll additional ones.

3. In the Users and Groups pane on the left, locate the users or groups that you want to enroll. You can do this in one of two ways:
   - Browse the hierarchy of groups and users.
   - Search for the groups or users using the search controls at the top of the page. If you are searching for a group, you can enter a group name or org code. If you are searching for users, you can enter a login name, first name, last name, or email address. You can also use an asterisk (*) as a wildcard that represents one or more characters.
4. Select the users or groups that you want to enroll, drag them to the Current Enrollments pane, and drop them on the pane. To select multiple users or groups, use Shift-click and Ctrl-click.

   Alternatively, you can select the users or groups, and then click beneath the two panes.

   The users or groups are enrolled in the learning program or LLC.
5. If prompted (because your site is configured to use enrollment-related notification emails), click **Yes** if you want to send a related email notification to the users or groups. If you do not, click **No**.
6. If desired, create an entry in the learning plan for the users or groups that you enrolled:
   a. In the Current Enrollments pane, select the users or groups. (Use **Shift-click** or **Ctrl-click** to select multiple users or groups.)
   b. Click **Configure Learning Plan** at the top of the pane.
   c. In the Editing Learning Plan dialog box, enter the information as appropriate (see Managing Assets in Learning Plans).

      Note that if you specify a relative due date for a learning asset that you are assigning to a *group*, be aware that users who are added to the group *at a later date* will inherit the assignment when they are added to the group, but they will not have the same due date. Their due date will be relative to the date on which they were assigned the asset, which is the date on which they were added to the group.

      For example, assume you add a course entitled *Leadership* to the learning plans for all members of a group (*Marketing Group*) on January 1, 2014; you also specify members of the Marketing Group must complete the *Leadership* course 3 months after you assign it, which means it is due April 1, 2014. On February 1, 2014, you add John to the Marketing Group. Because John is assigned *Leadership* one month later (when he is added to the group), his due date for the *Leadership* course is also one month later (May 1, 2014).
   d. Click **OK**.

Note: If a user has an existing administrator-assigned learning plan entry for the asset, this step **updates** the entry; it does not create a new one. In addition, be aware that you can modify thisentry later by returning to this page and repeating this step.

An icon displays in the **Learning Plan** column for the selected users or groups to indicate that they have a corresponding learning plan entry.

Approve Pending Enrollment Requests

If you have been selected as an approval manager for learners, you must approve the enrollment of those learners in all learning programs that have been configured to require manager approval.

To approve the enrollment of learners in a learning program

1. In Skillport Administrator, click **Content > Learning Programs**.
2. Click the **Users** tab in the Current Enrollments pane on the right.
3. On the Users tab, select the users whose enrollments are in Pending Approval status. To select multiple users, use Shift-click or Ctrl-click.

   Note: You can also filter the list of users shown to include only those whose status is Pending Approval. For more information, see ***View Current Enrollments*** on page 36.

4. Click **Approve Pending**.

Withdraw a User or Group

When you withdraw users or groups from a learning program or Live Learning course (LLC), keep in mind the following:

- A user can be enrolled in a learning program or LLC both individually and due to membership in a group that is enrolled. These enrollments are treated independently; if you withdraw one, the other is unaffected.
- You cannot withdraw users who have completed the program or course. The completion data for all users who have completed learning programs or LLCs always remains in the learner transcript for those users (unless you delete the learning program).
- You cannot withdraw an individual user from a group enrollment.
- If you remove a user from a group, the user is automatically withdrawn from a group enrollment as long as he or she has not completed the program or course.
- If your site is configured to use enrollment-related notification emails:
  - When you individually withdraw users from a learning program, the users are automatically sent a notification email.
  - When you withdraw groups, you are prompted to specify whether to send a notification email.

You can withdraw users or groups in two ways:

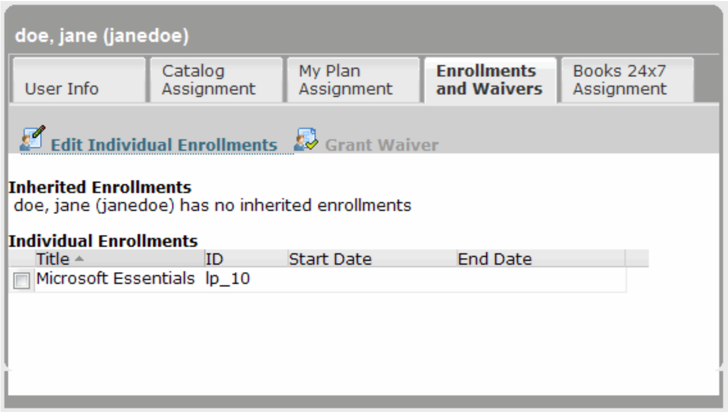
To withdraw by selecting users or groups

1. Click **Users & Groups > User Management** on the navigation bar.

   The User Management page displays.

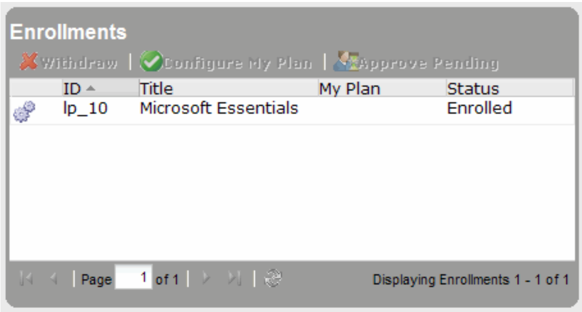
2. In Users and Groups, find the group or find the user that you want to withdraw from a learning program, and select that group or user.
3. In the right pane, click the **Enrollments and Waivers** tab.

Both inherited enrollments and individual (if you have selected a user) or explicit (if you have selected a group) enrollments for the user or group are displayed. As an example, the following image shows the inherited and individual enrollments for a selected user.



4. Do one of the following:

   - If you selected a user, click **Edit Individual Enrollments**.
   - If you selected a group, click **Edit Group Enrollments**.



5. In the right pane, select the learning program, and click **Withdraw**.

6. In the Confirm dialog box, click **OK**.

7. In the Withdraw dialog box (if available), if you want to send a notification email to the group or user, click **Yes**. Otherwise, click **No**.

8. Click **Save**, and then click **OK**.

   The learning program is removed from the learner transcripts for all affected users.

Note: You may also want to remove any corresponding entries in the users' Learning Plan. You can remove Learning Plan entries using the **Learning Plan Assignment** tab on the **User and Group Management** page. For more information, see ***Add or Remove Assets from a User's Learning Plan*** on page 69.

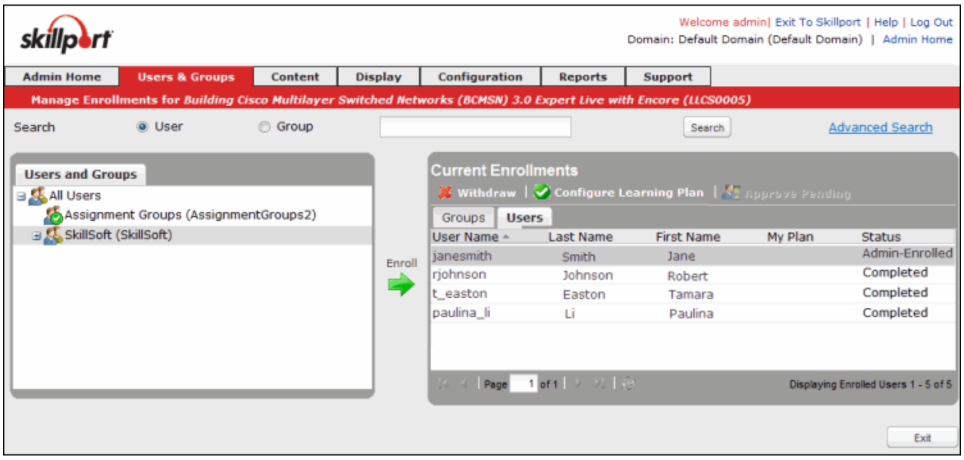
To withdraw by selecting the learning program or LLC

1. Click **Users & Groups > Enrollments and Waivers** on the navigation bar.

   The Manage Enrollments and Waivers page displays.

2. Select the learning program from the list, and click **Manage Enrollments**.

The Manage Enrollments page displays.



3. If you want to withdraw individual users, click the **Users** tab in the Current Enrollments pane. Otherwise, leave the **Groups** tab active.

4. In the Current Enrollments pane, select the users or groups that you want to withdraw. To select multiple users or groups, use **Shift-click** or **Ctrl-click**.

5. Click **Withdraw**, and then click **OK**.

6. If the users or groups have associated Learning Plan assignments, you are prompted to choose whether to remove them:

   - Click **Yes** to remove the assignment.

   - Click **No** to keep the assignment.

7. Click **Yes** to confirm the withdrawal.

8. If prompted, click **Yes** if you want to send an email notification to the users or groups. If you do not, click **No**.

   The learning program is removed from the learner transcripts for all applicable users.

Grant Waivers to a User

You can grant a waiver from one or more learning assets in a learning program to one or more users. A waiver from an asset applies to all of the user's enrollments in the learning program; even if the user withdraws and then enrolls again, the waiver remains. In addition, if the user is enrolled in the learning program both individually and due to membership in a group that is enrolled, the waiver applies to both enrollments.

Note: You can grant waivers from assets on a per-learning program basis. If an asset is used in two learning programs, a waiver from the asset in one learning program does not automatically apply to the same asset in the other learning program.

To grant a waiver by selecting a learning asset

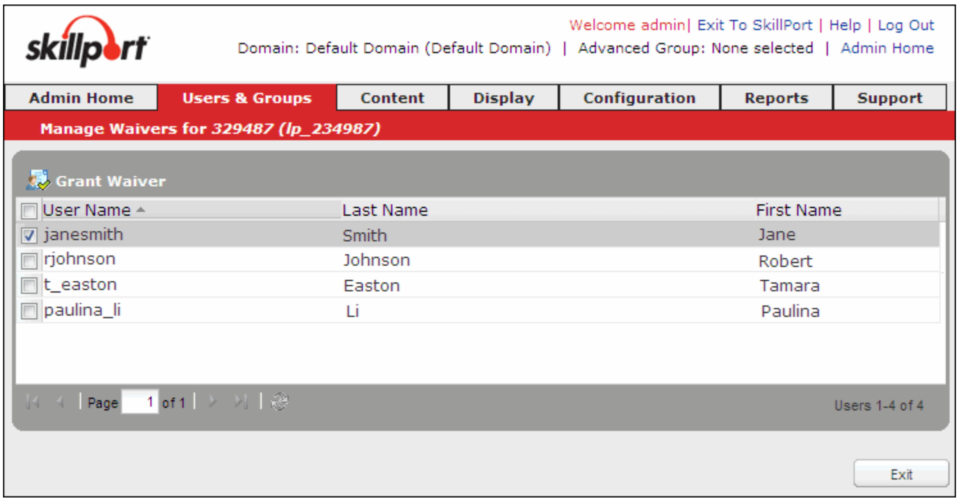
1. Click **Users & Groups > Enrollments and Waivers** on the navigation bar.

   The Manage Enrollments and Waivers page displays.

2. Click the asset for which you wish to grant waivers.

3. Click **Manage Waivers**.

   The Manage Waivers page displays:



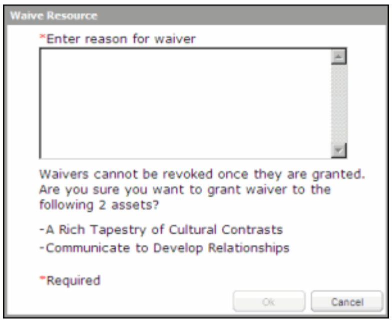
Note: If the list of learners is long, it can be helpful to filter the display to include only those learners who meet specific criteria. For this reason, use the columns in the table to apply filters in the same way that you can on the Manage Enrollments page. For information on working with these filters, see Manage Information in Tables.

4. Select the user for whom you want to grant the waiver, and click **Grant Waiver**.

   The Grant Waiver dialog box displays, which lists all the learning assets in the learning program or Live Learning course (LLC) for which completion can be determined.

5. Select all the assets for which you want to grant a waiver.

6. Click **Waive**. The Waive Resource dialog box displays:



7. Enter the reason for the waiver.

8. Click **OK**. The Waive Resource dialog box closes, and the Grant Waivers to Multiple Users dialog box updates to reflect the granted waivers.

Note: Waivers cannot be revoked once granted. Repeat these steps for each additional asset for which you want to grant a waiver.

9. Click **Exit**.

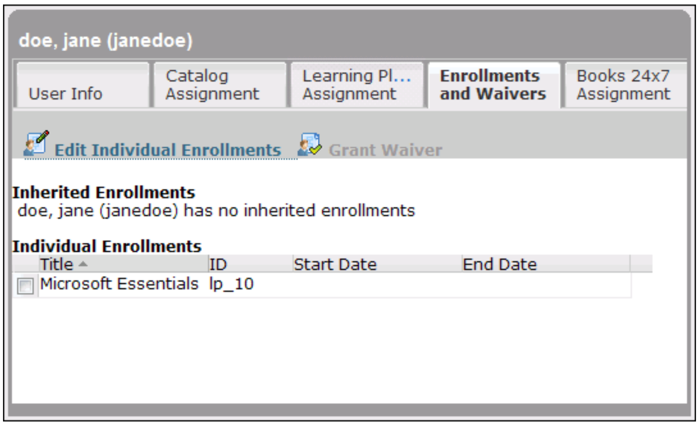
To grant a waiver by selecting a user

1. Click **Users & Groups > User Management** on the navigation bar.

2. Find the user for whom you want to grant a waiver, then select the user.

3. In the right pane, click the **Enrollments and Waivers** tab.

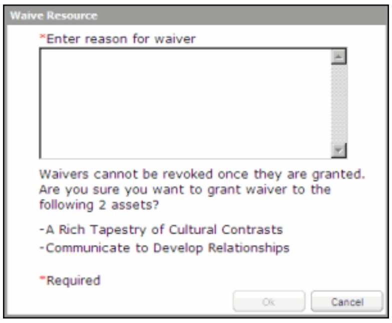
   The enrollments for the selected user display:



4. Select the check box beside the learning program for which you want to grant a waiver, and click **Grant Waiver**.

The Grant Waiver for User dialog box displays:

5. Select all the assets for which you want to grant a waiver.
6. Click **Waive**. The Waive Resource dialog box displays:



7. Enter the reason for the waiver.
8. Click **OK**. The Waive Resource dialog box closes, and the Grant Waiver for User dialog box updates to reflect the granted waivers.

Note: Waivers cannot be revoked once granted. Repeat these steps for each additional asset for which you want to grant a waiver.

9. Click **Exit**.

Grant Waivers to Multiple Users

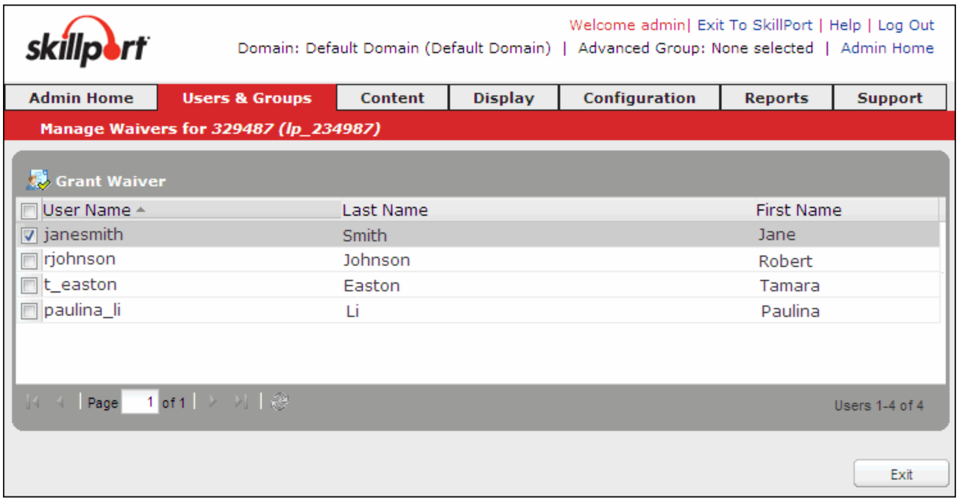
If multiple users have requested a waiver for the same asset, you can grant waivers to them using the

Grant waivers to multiple users

1. In Skillport Admin, click **Users & Groups > Enrollments and Waivers** on the navigation bar.

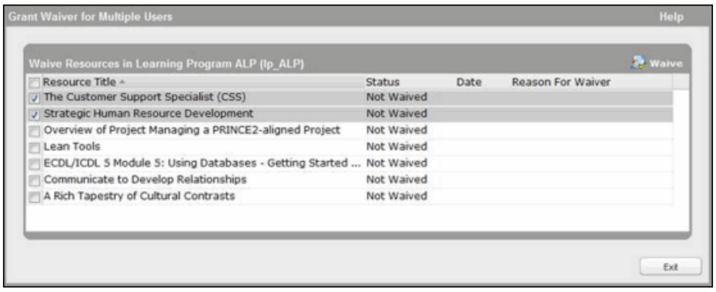
   The Manage Enrollments and Waivers page displays.
2. Click the asset for which you wish to grant waivers.
3. Click **Manage Waivers**.

The Grant Waivers page displays.



4. Select all users for whom you want to grant the waivers, and click **Grant Waiver**.

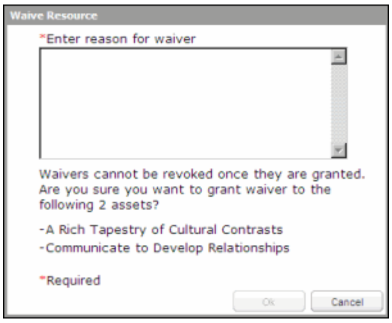
   The Grant Waivers for Multiple Users dialog box displays.



5. Select each asset you wish to waive for the selected users.

6. Click **Waive**.

   The Waive Resource dialog box displays.



7. Enter the reason for the waiver.

8. Click **OK**. The Waive Resource dialog box closes, and the Grant Waivers to Multiple Users dialog box updates to reflect the granted waivers.

Note: Waivers cannot be revoked once granted.

9. Click **Exit**.

Batch Add/Update (Users & Groups)

Add or Update Multiple Users (Batch Add)

Using the Batch Add/Update page, you can use a single process to:

- upload multiple users at once
- upload changes to existing users at once
- upload multiple new users and update multiple existing users at the same time

Download the User template on the Batch Add/Update page to add multiple new users, or make changes to existing ones. To create a single user, see ***Create a User Manually*** on page 31.

Note: You can also add or update multiple groups and grant multiple waivers to assets within a Learning Program.

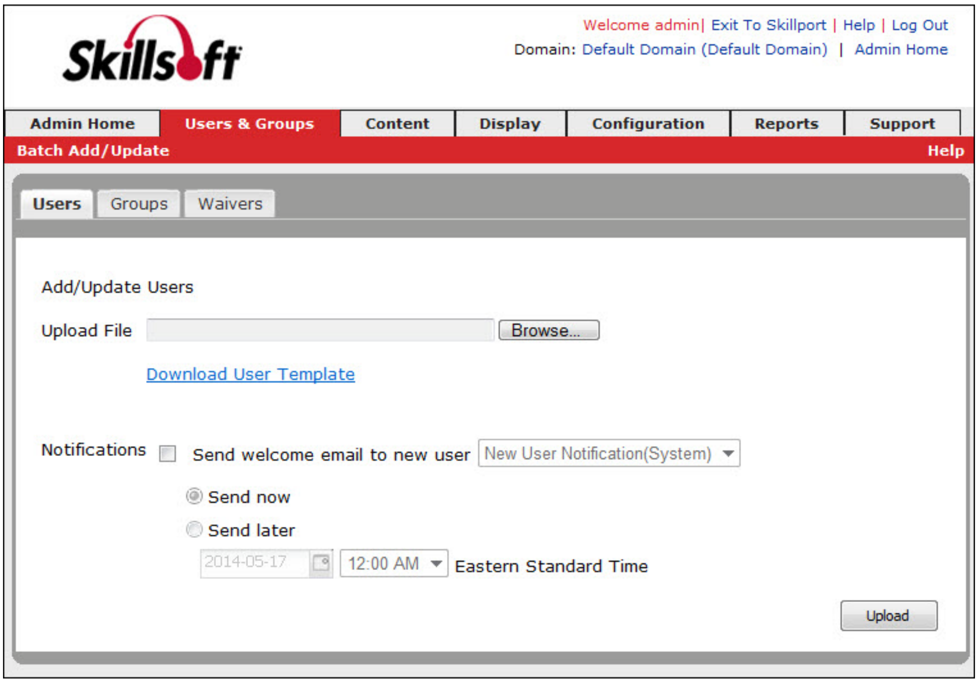
To add or update multiple users at once

1. Properly complete the User template.

   Note: In the User template, ensure the second line containing the helpful hints is removed from the CSV file.

2. Click **Users & Groups > Batch Add/Update** on the navigation bar.

   By default, the **Users** tab displays on the Batch Add/Update page:

   Note: If Approval Managers are enabled on your site, the **Send approval manager email to updated user** option displays.

3. Click **Browse**.

4. Locate the User template .csv file and select it.

Note to Safari users: When using Safari to download the template, it downloads in TXT format, not CSV format. You must use the CSV file format for the upload.

5. If enabled on your site, select your notification preferences:

   - Select the **Send Welcome email to new user** option to send an automatically-generated email to all users with a valid email.

   - Select the **Send approval manager email to updated user** option to send an automatically-generated email about the changes to the users' approval managers to all users with a valid email.

6. If you have selected to send emails, specify when to send them:

   - If you want to send the email immediately after the upload, click **Send now**.

   - If you want to send the email at a specific date and time, click **Send later**, and then specify the date and time.

   If you select to send the notification email at a specific date and time, you cannot change the date or time, or delete emails from the queue.

7. Click **Upload**.

   The upload and verification process begins. If you have a valid email address associated with your Skillport credentials, an email is sent to you that contains the URL of a status report, and the date and time that the batch was submitted.

Note: Once processed, view the *Batch Uploads* report (**Users & Groups > Batch Uploads Report** on the navigation bar) to see the upload records.

User CSV Template

****IMPORTANT:** If using a CSV file downloaded prior to the Skillport 8.0.3285 release, it will not upload. You must either download a new CSV file, or modify your existing CSV file.****

To modify an existing User CSV file (prior to May 2014)

1. In your User CSV file, change `_sys_userid` to `Username`.

2. Change `_sys_password` to `Password`.

3. Ensure the column headers are in the following order:

   - `Username`
   - `Password`
   - `_sys_firstname`
   - `_sys_lastname`
   - `_sys_emailaddress`

- `_sys_display_first_name`
- `_sys_display_last_name`
- `_sys_location`
- `Force Password Change`
- `Status`
- `Role`
- `Group Membership`
- `Group Operation`
- `Approval Manager`
- `custom_privileges`

4. Save your file in the .csv file format.

This template contains standard user profile fields. The fields included in the template may vary, based on the settings configured on the Manage User Profile Fields page. A standard field that displays as **Enabled** on the Manage User Profile Fields page is included in the user CSV template.

Note to Safari users: When using Safari to download the template, it downloads in TXT format, not CSV format. You must use the CSV file format for the upload.

File Type

- Must be submitted in CSV format
- Must be encoded in UTF-8 format.

  Ensure you specify the encoding format before you save the file.

  - If using a text editor, such as Notepad, click **File > Save As**, then select **UTF-8** as the encoding format.
  - If using Microsoft Excel, click **File > Save As > Web Options**, then select **Unicode (UTF-8)** as the document type.

Upload Guidelines

- If you are uploading a batch of changes to existing users, you only need to complete the **Username** fields and the fields you wish to change. During an update operation, if a field is left empty, the existing value for a user is not changed.
- You can add or update values in the custom user profile fields when you add or update multiple users.
- Do not change the values in row 1 (column headers).
- Enclose fields with embedded commas in quotes. Note that the quotes are not saved as part of the field value. If quotes are desired as the first and last characters of the field data, then you must enclose them with a second set of quotes. For example, to upload `“myName”`, you must enter `““myName””`.
- If the administrator submitting the upload file has a valid email address, an email is sent that includes the URL of the file, and the date and time that the upload was submitted.
- When an upload is requested, an entry displays in the Reports section. The CSV-format report lists any records that were not successfully uploaded.
- If an error occurs with the column names, the batch file is rejected at upload.
- If there is an error with an individual user record in the template, only that record will fail, and correct records in the same batch file upload without issue.
- You can view all batch file rejections, individual failures, and the reason for these errors in the Batch Upload report.

User CSV Template Field Definitions

The following table describes each standard user profile field in the user CSV template. Multiple custom user profile fields can be uploaded using a different CSV template. See Batch Add/Update Custom User Profile Fields for more information.

Field	Required?	Max Text Size	Description
Username	**Yes**	255 acceptable characters	abcdefghijklmnopqrstuvwxyz0123456789@$_.~'- A user ID (user name) cannot start with an apostrophe (') or a dash (-). Non-breaking white spaces (space, tab, and newline) and multi-byte characters (for example, Japanese or Chinese characters) are not allowed. All user IDs are converted to lower case, then validated, and finally saved in lower case if valid. The user's sign in name. **Note:** The user name cannot be changed when doing updates by upload. Certain reserved words produce an error. The most common are: add, all, block, count, down, force, link, mount, off, simple, tag, up.

Password	No	255 acceptable characters	abcdefghijklmnopqrstuvwxyz0123456789@$_.~'- A user ID (user name) cannot start with an apostrophe (') or a dash (-). Non-breaking white spaces (space, tab, and newline) and multi-byte characters (for example, Japanese or Chinese characters) are not allowed. All user IDs are converted to lower case, then validated, and finally saved in lower case if valid. The user's password for Skillport sign on. If omitted, the value for **Username** is used. Passwords are case-sensitive. **Note:** This field is ignored during a batch update. Passwords can only be changed within Skillport Administrator.
_sys_firstname	No	255 All Latin-1 and double-byte characters are accepted.	The user's first name. If omitted, the value for **Username** is used.
_sys_lastname	No	255 All Latin-1 and double-byte characters are accepted.	The user's last name. If omitted, the value for **Username** is used.
_sys_emailaddress	No	255 acceptable characters	abcdefghijklmnopqrstuvwxyz0123456789@$_.~'- A user ID (user name) cannot start with an apostrophe (') or a dash (-). Non-breaking white spaces (space, tab, and newline) and multi-byte characters (for example, Japanese or Chinese characters) are not allowed. All user IDs are converted to lower case, then validated, and finally saved in lower case if valid. The user's email address. If omitted, this field is left blank. Non-breaking white spaces (space, tab, newline) are not allowed.
_sys_display_first_name	No	255 All Latin-1 and double-byte characters are accepted.	The user's first name to display in the Skillport interface, such as in the Community. (For example, a learner's nickname, or a name other than his legal first name).

_sys_display_last_name	No	255 All Latin-1 and double-byte characters are accepted.	The user's last name to display in the Skillport interface, such as in the Community. (For example, a learner's maiden name, or a name other than her legal last name).
_sys_location	No	4000	The user's geographic location.
Force Password Change	No	See Description	You can force the user to change his password the first time he signs into Skillport. Acceptable values are 1 or 0. If omitted, the default is 0. ▪ **0:** Allows the user to keep his assigned password. Determines whether the user will be forced to change his or her password immediately after the next (or first) login. ▪ **1:** Forces the user to change his password when he first signs into Skillport.
Status	No	See Description	The active/inactive status of the user. Acceptable values are 1 and 0. If omitted during an add operation, the default is 1. If omitted during an update operation, the user's status is unchanged. ▪ **0:** Marks the user as Deactive. ▪ **1:** Marks the user as Active.
Role	No	See Description	The user's role. The default value is `END_USER`. Values include: ▪ `END_USER` ▪ `MANAGER` ▪ `ADMIN` ▪ `COMPANY_ADMIN` **Note**: The value for Role determines the user's access privileges in the system and is not meant to identify his position within the organization. Super administrators cannot be created using Batch Add.

Group Membership	**Yes** for New Users **No** for Existing Users (See note in Description.)	240	One or more org codes associated with the groups to which the given user should be added. A user can belong to multiple organizational groups, but only one advanced group. Each org code must be separated by a semicolon. Capital letters are accepted. Non-breaking white spaces (space, tab, newline) are not allowed. **Note:** This field is required for new users and optional for existing users. Groups associated with the specified org codes must exist prior to the upload; to determine a group's org code, click **Users and Groups > User Management**, and navigate to the group in the left pane. The org code displays in parentheses beside the group name.
Group Operation	No	See Description	Indicates how the groups specified in the Group Membership field are applied to the user. If omitted, the default is 0. If a value for Group Membership is omitted, this field is ignored. Acceptable values are: **0**: Replaces the user's current list of groups with the list specified in the Group Membership field. If you use this value, include in the Group Membership field the complete list of new groups that will replace the user's current groups. If you are uploading new users, this option adds them to the specified groups. **1**: Adds the user to the groups specified in the Group Membership field. If you use this value, include in the Group Membership field only the groups that you are adding. If you are uploading updates to existing users, this option retains the users' existing groups and adds the users to the specified groups. **2**: Removes the user from the groups specified in the Group Membership field. This value is only valid if you are uploading updates to existing users. If you use this value, include in the Group Membership field only the groups that you are removing.

Approval Manager	No	255 All Latin-1 and double-byte characters are accepted.	The user ID of an existing user who is the approval manager for this user. **Note:** This column only displays if Approval Managers are enabled on your site.
custom_privileges	No	See Description	If you want to assign custom privileges not already associated with the user's selected role, or if you wish to remove specific custom privileges that are already assigned to the user (or are included in the user's role by default), use this column to specify those. See Assign Custom Privileges in the User CSV Template before using this column.

Assign Custom Privileges in the User CSV Template

Important Information About Assigning Custom Privileges using Batch Add

- Multiple values can be provided in this field using the pipe (|) to separate the values.
- Each value must start with either + or - to indicate the inclusion or exclusion of the privilege.
- When adding a custom privilege to a user, Skillport examines the user's assigned role and grants the custom privilege only if the assigned role allows it (for example, a user with an END_ROLE user cannot be granted course completion privileges, as that is only available to Admins). If a custom privilege in the custom_privilege column is not allowed within the specified role, the privilege is not assigned, and the user is processed without it. All valid privileges in this column will be assigned to the user, even if one or more in the list are skipped.

Example of Removing Privileges from a User Role

- **Goal:** Add a user specifically to run reports.
- **Choose the User Role:** Reports can be run by managers and above; as you want this user to have only a single privilege, choose the lowest role possible, which is Manager.
- **Set the Privilege:** You must remove all privileges except reporting, so you would enter the following in the custom_privileges column in the CSV template:

```
-USER_MANAGER_PRIVS|-CURRICULUM_BUILDER_PRIVS|-
CURRICULUM_ASSIGNER_PRIVS|-LEARNER_RECORD_ASSIGNER_PRIVS|-
COURSE_EVAL_BUILDER_PRIVS|-ADMIN_MANAGEMENT_PRIVS|-
ADMIN_SYSTEM_PRIVS|-ADMIN_PRESENTATION_PRIVS|-
BOOKS24X7_ASSIGNER_PRIVS|-LEARNING_PROGRAMS_PRIVS|-ENROLLMENT_PRIVS|-
USERS_AND_GROUPS_PRIVS
```

Example of Adding Privileges to a User Role

- **Goal:** You want a user to be able to delete other users and groups.
- **Choose the User Role:** This privilege can only be granted to users with an Admin or Company Admin role. Select one of these.
- **Set the Privilege:** Enter the following in the custom_privileges column in the CSV template:

  `+DELETE_USER_PRIVS`

Valid values for the custom_privileges column in the User CSV Template:

- `ADMIN_MANAGEMENT_PRIVS`

  Allows access and configuration privileges to the Content pages.
- `ADMIN_PRESENTATION_PRIVS`

  Allows the user to configure the Skillport Learner interface.
- `ADMIN_REPORTS_PRIVS`

  Provides access to Skillport Reports.
- `ADMIN_SYSTEM_PRIVS`

  Allows access and configuration privileges to the Configuration pages.
- `ASSIGNMENT_GROUP_PRIVS`

  Allows the user to create and manage assignment groups.
- `BOOKS24X7_ASSIGNER_PRIVS`

  Allows the user to assign Books24x7 collections to users and groups.
- `COURSE_COMPLETION_PRIVS`

  Allows access and configuration privileges to the Completion Criteria page.
- `COURSE_EVAL_BUILDER_PRIVS`

  Allows the user to create and manage evaluations.
- `CURRICULUM_ASSIGNER_PRIVS`

  Allows the user to assign or deassign content in the Library.
- `CURRICULUM_BUILDER_PRIVS`

  Allows the user to make changes to the Skillport Library.
- `DELETE_DOMAIN_PRIVS`

  Allows the user to delete domains.
- `DELETE_USER_PRIVS`

  Allows the user to delete users and groups.
- `ENHANCED_COMPLIANCE_PRIV`

Allows the user Advanced Compliance privileges.

- `ENROLLMENT_PRIVS`

  Allows the user to ***enroll other users and groups in assets*** on page 176 such as learning programs or ILT sessions, and grant associated waivers for specific assets in those learning programs.

- `FEATURED_TOPIC_PRIV` (available to the End User role)

  Grants the Curator role to the user. This allows him to add and remove assets within an active Featured Topics folder in the Library. Enabling this privilege displays the **Add to Featured Topics** option on an asset's Details page in Skillport Learner.

- `ILT_ADMIN_PRIV` (available to the End User role)

  Allows the user access to all ILT pages within Skillport Administrator, including the Course and Session Manager, Resources Manager, and Batch Add functionality.

- `ILT_COURSE_ADMIN_PRIV` (available to the End User role)

  Grants access to the ILT Course and Session Manager.

- `ILT_SESSION_ADMIN_PRIV` (available to the End User role)

  Grants access to the ILT Session Manager.

- `ILT_SESSION_APPROVER_PRIV` (available to the End User role)

  Allows the user to access the Approval Manager to approve session enrollment requests.

- `ILT_SESSION_INSTRUCTOR_PRIV` (available to the End User role)

  Grants the Instructor role to the user. As an instructor, you can manage most of the ILT session details you deliver and also manage the session roster.

- `INGENIUS_PRIVS`

  Allows the user to specify Community settings.

- `KEYWORD_PRIV`

  Allows the user to create and manage keywords. This privilege is granted by default to company administrators, but it can be revoked. It is also available to administrators, but it is not granted to them by default.

- `LEARNING_PROGRAMS_PRIVS`

  Allows the user to create and manage learning programs.

- `LEARNER_RECORD_ASSIGNER_PRIVS`

  Allows the user to assign assets to the Learning Plan for individual learners and groups.

- `MULTIPLE_COMPLETION_ACCESS_PRIVS`

  Allows the user to set specific courses to allow multiple completions.

- `PUBLISHER_PRIV`

  Allows the user access to Skillsoft Publisher and the ability to upload custom content and publish passive content.

- `USERS_AND_GROUPS_PRIVS`

  Provides access to the Users & Groups pages.
- `USER_MANAGER_PRIVS`

  Allows the user access to view and edit user and group information for those within the user's hierarchy.

Add or Update Multiple Groups (Batch Add)

You can create a batch of new groups or upload a batch of changes to existing groups. This is useful when creating an initial organizational group hierarchy for the users in your organization. A group hierarchy is needed in order to register learners into specific groups or subgroups. Once a group structure is in place, you and other administrators can better manage reporting and curriculum assignments.

If you need to create just a few groups, see ***Create a Group Manually*** on page 33.

Note: You can also add or update multiple users and grant multiple waivers to assets within a Learning Program.

To add or update multiple groups at once

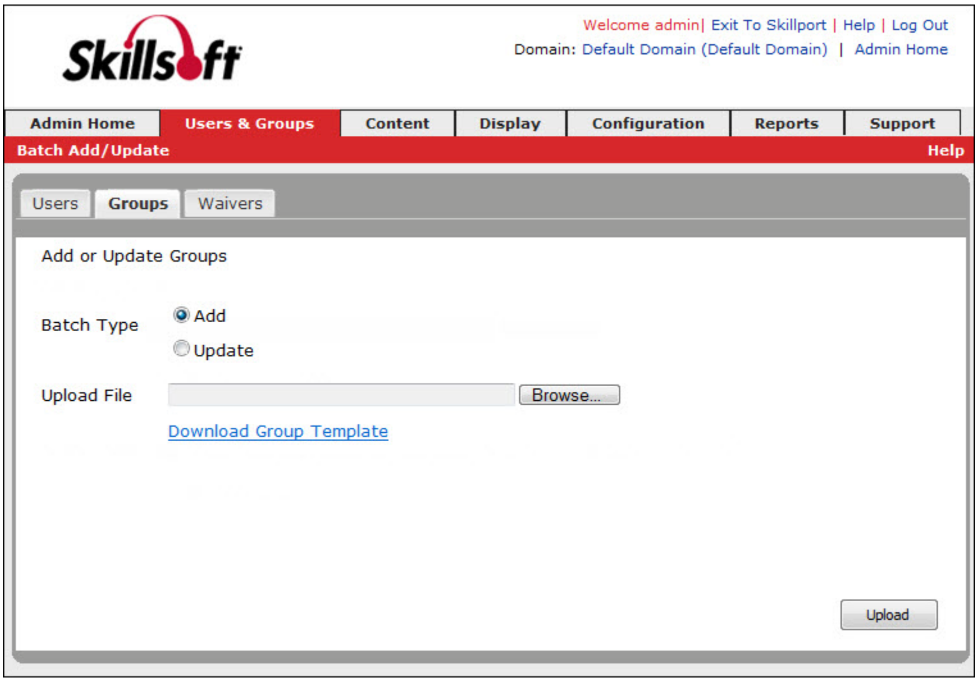
1. Properly complete the Group CSV template.

   Note: In the User template, ensure the second line containing the helpful hints is removed from the CSV file.

2. Click **Users & Groups > Batch Add/Update** on the navigation bar.

   By default, the **Users** tab displays on the Batch Add/Update page.

3. Click the **Groups** tab.



4. Select the type of Batch Add you want to perform.

   - **Add:** The .csv file contains new groups.

     Note: Groups are added in a hierarchical and sequential manner. Be sure to place the highest level group first, followed by subgroups. Your main company group is typically created as part of your Skillsoft site build. See Completing the Group CSV Template.

   - **Update:** The .csv file contains updates to existing groups.

     Note: If you are updating changes to existing groups, changes to the Parent Group column in the Group CSV file are ignored because groups cannot be moved to new parent groups using the Batch Add/Upload feature.

5. Click **Browse**.

6. Locate the group template .csv file and select it.

   Note to Safari users: When using Safari to download the template, it downloads in TXT format, not CSV format. You must use the CSV file format for the upload.

7. Click **Upload**.

   The upload and verification process begins. If you have a valid email address associated with your Skillport credentials, an email is sent to you that contains the URL of a status report, and the date and time that the batch was submitted.

Note: Once processed, view the *Batch Uploads* report (**Users & Groups > Batch Uploads Report** on the navigation bar) to see the upload records.

Group CSV Template

Use the group CSV template to define and upload the hierarchy of the user groups in your organization. A group hierarchy is needed to register learners into specific groups or organizations. Once your group structure is in place, administrators can better manage reporting and curricula assignments.

File Type

- Must be submitted in CSV format
- Must be encoded in UTF-8 format

File Names

As a best practice (not required), use a convention such as `<mycompany>_groupUPDATE_<date>.csv`, for example, `skillsoft_groupUPDATE_05312014.csv`.

Upload Guidelines

- You must include all required fields.
    - You can view all batch file rejections and individual failures, and the reason for these errors, in the Batch Upload report.
- During an update operation, if an optional field is left empty, the existing value for a group is not changed.
- Specify parent groups before subgroups. See Define the Group Hierarchy using the Group CSV Template.
- Do not change the values in row 1 (column headers) or the import will fail.
- Do not exceed the maximum field sizes (see table below).
- Enclose fields with embedded commas in quotes.
    - Quotation marks are not saved as part of the field value. If quotes are desired as the first and last characters of the field data, you must enclose them with a second set of quotes. For example, to upload "`myName`", you must enter ""`myName`"".

Upload Format

A group upload file contains several columns that organize the groups in an expandable tree structure. The column labels in the group CSV file are identical to the field labels that you see when you create a new group on the User Management page. The following table describes each field in the group CSV template:

Field	Required?	Max Text Size	Description
Name	Yes	240	The name for the group that is displayed on the User Management page.
Org Code	Yes, but only for an update	240	The unique, alphanumeric identifier for the group. The purpose of the org code is to uniquely identify the group in the system, as the name of the group does

	operation		not have to be unique. If you do not specify an org code for a new group, the system assigns one to the group automatically during the import process using the format org_<number>, for example, org_18. However, you can change the org code for a group at any time. You can use the following characters: ▪ a-z ▪ A-Z ▪ 0-9 ▪ _ (underscore) ▪ - (hyphen) ▪ all Latin-1 characters that correspond to the following codes: #161 through #255, inclusive Spaces, tabs, and new lines are not accepted. **Note:** Do not change this value when performing a group update. To determine a group's org code, click **Users & Groups > User Management**, and navigate to the group in the hierarchy in the left pane. The org code for a group is displayed in parentheses beside the group name.
Display on Registration Page	No	See Description	Determines whether the group is displayed on the Self-Registration page. Acceptable values are: ▪ **0** - Hides the group on the registration page ▪ **1** - Displays the group on the registration page The default value is 0. **Note**: All groups displayed on the Self-Registration page must also display the parent group under which they reside. In other words, to display a subgroup on the Self-Registration page, you must first display its parent group.
Group Type	No	See Description	Indicates the type of group. Acceptable values include: ▪ `NORMAL` ▪ `ADVANCED` ▪ `ASSIGNMENT_GROUP` If this field is left blank the group data is treated as a

			NORMAL group.
Parent Group	Yes	240	The org code of the parent group for this group. A group with this org code must already exist. Capital letters are accepted, and the value must not contain spaces, tabs or new lines. The value _*_ means this group is a root group (has no parent). The position of this field in the group upload file will determine its lineage. **Note:** Advanced groups may only be top-level groups. Assignment groups may only exist in the top-level group called Assignment Groups. The Parent Group field is ignored for both of these group types, and any changes to this column in the Group CSV template are ignored (groups cannot be moved to new parent groups using the Batch Add/Upload feature).

Completing the Group CSV Template

Important Information

- The group CSV template adds groups in a hierarchical manner:
  - The top-level (root) group must be indicated first.
  - Subgroups are added sequentially as defined in the group CSV template.
- To effectively show how to create a group CSV file, this procedure uses an example company, Akara.

Example Group CSV Template

Because groups are added to Skillport in a specific manner, to create an effective group hierarchy like this:

You must create a group CSV template like this:

Top-level (Root) Group "Akara"
Subgroup of Akara group
Subgroups of Human Resources group
Subgroups of Akara group

	A	B	C	D	E
1	Name	Org Code	Display on Registration Page	Group Type	Parent Group
2	Akara	Akara	1		
3	Human Resources	org_2	1		Akara
4	Benefits	org_3	1		org_2
5	Compensations	org_4	1		org_2
6	Marketing	org_5	1		Akara
7	Sales	org_6	1		Akara
8					

To successfully complete the group CSV template

1. List your groups and associated Org Codes. You can use the default groups (*Skillsoft* and *Assignment Groups*), or create your own.

a Enter the name of a parent group you wish to add in the **Name** column.

b In the **Org Code** column, enter a unique code for the group.

c Enter the name of the subgroups you wish to add in the **Name** column directly below their associated group.

d In the **Org Code** column, enter a unique code for the subgroup.

e Repeat these steps for all groups and subgroups you wish to add to Skillport.

Note: To create a top-level group in the Group CSV file, enter its group name in both the **Name** and **Org Code** columns. Then, for each of its subgroups, enter the new top-level group's name. For example, to create the Akara top-level group, enter the following:

	A	B	C	D	E
1	Name	Org Code	Display on Registration Page	Group Type	Parent Group
2	Akara	Akara	1		

Default Groups in Skillport

Two top-level groups are available by default in Skillport - *Assignment Groups* and *Skillsoft*. By default, both of these groups are entitled to all content your Skillport site offers.

In this example

Akara wants to target their users based on their department and team. They have three departments: *Human Resources*, *Marketing* and *Sales*. The Human Resources department has two teams - *Benefits* and *Compensations*. They want each department to have its own group within Skillport, and they want the Human Resources department to have two subgroups for its teams.

Akara creates their own top-level group and enters the group names and associated Org Codes into the group CSV template, listing first the parent group, then any subgroups:

	A	B	C	D	E
1	Name	Org Code	Display on Registration Page	Group Type	Parent Group
2	Akara	Akara	1		
3	Human Resources	org_2	1		Akara
4	Benefits	org_3	1		org_2
5	Compensations	org_4	1		org_2
6	Marketing	org_5	1		Akara
7	Sales	org_6	1		Akara

Note: If the Benefits and Compensations groups are listed in the row **before** the Human Resources group, the upload would fail because both groups are subgroups of the Human Resources group. To add either group to the system, the Human Resources group must already exist - which means it must be created first during the upload.

1. Mark groups for inclusion or exclusion on your Skillport registration page.

You can specify that the groups defined in the group CSV file display on the registration page, to allow learners to join these groups (either a single group or multiple groups) when they register themselves.

In the group CSV template, in the Display on Registration Page column:

- Enter `0` to hide a group on the registration page.
- Enter `1` to display the group on the registration page.*

  *You must enter `1` for the parent group of any sub-group you wish to display in the drop-down list.

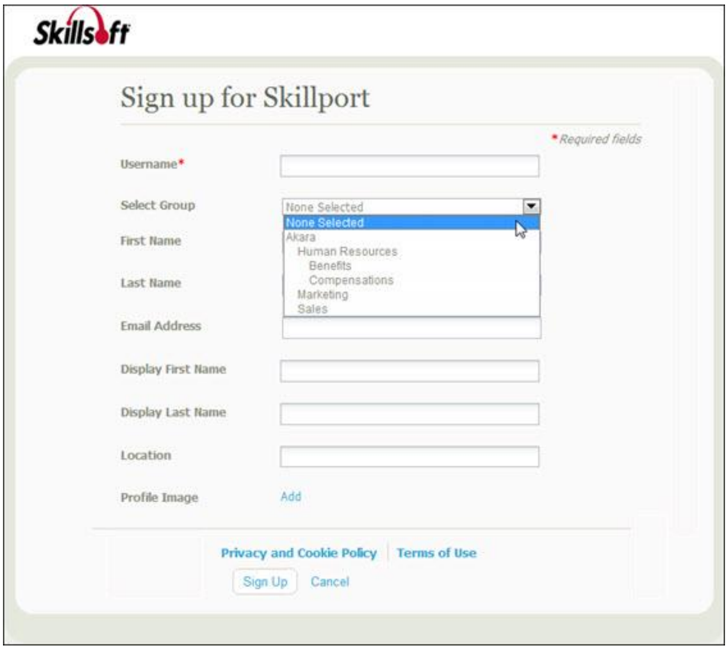
Note: Ensure you have your Skillport site configured to display groups. See Registration for more information.

In this example

Akara wants to display all of their company-specified groups and subgroups on the registration page. In the groups CSV file, they entered `1` for all groups:

	A	B	C	D	E
1	Name	Org Code	Display on Registration Page	Group Type	Parent Group
2	Akara	Akara	1		
3	Human Resources	org_2	1		Akara
4	Benefits	org_3	1		org_2
5	Compensations	org_4	1		org_2
6	Marketing	org_5	1		Akara
7	Sales	org_6	1		Akara

Their registration page, once configured to display groups and the CSV template uploads to Skillport, looks like this:



1. Determine each group's type.

There are three different types of groups within Skillport: Normal groups, ***Advanced groups*** on page 46, and ***Assignment groups*** on page 49. Enter one of the following values in the Group Type column in the groups CSV template:

- `NORMAL`
- `ADVANCED`
- `ASSIGNMENT_GROUP`

If this field is left blank, the group data is treated as a Normal group.

In this example:

Akara created only Normal groups by leaving those fields blank in the group CSV file:

	A	B	C	D	E
1	Name	Org Code	Display on Registration Page	Group Type	Parent Group
2	Akara	Akara	1		
3	Human Resources	org_2	1		Akara
4	Benefits	org_3	1		org_2
5	Compensations	org_4	1		org_2
6	Marketing	org_5	1		Akara
7	Sales	org_6	1		Akara

1. Define the parent groups.

- If the parent group already exists in Skillport, enter the parent group name in the Parent Group column.
- If the parent group is being created in the group CSV template, in the **Parent Group** column, enter the Org Code specified in the **Org Code** column of the group CSV template.

In this example

Akara had an existing group already existing in Skillport (*Akara*). Akara wants to target their users based on their department and team. They have three departments: *Human Resources*, *Marketing* and *Sales*. The Human Resources department has two teams - *Benefits* and *Compensations*. They want each department to have its own group within Skillport, and they want the Human Resources department to have two sub-groups for its teams. Each department - *Human Resources*, *Marketing*, and *Sales* - has a parent group of Akara.

They enter the Akara parent group name in the **Parent Group** column:

	A	B	C	D	E
1	Name	Org Code	Display on Registration Page	Group Type	Parent Group
2	Akara	Akara	1		
3	Human Resources	org_2	1		Akara
4	Benefits	org_3	1		org_2
5	Compensations	org_4	1		org_2
6	Marketing	org_5	1		Akara
7	Sales	org_6	1		Akara

The Human Resources group has its own subgroups. Those subgroups, *Benefits* and *Compensations*, are listed directly underneath the Human Resources group, and reference the Human Resources Org Code (org_2) as their parent group:

	A	B	C	D	E
1	Name	Org Code	Display on Registration Page	Group Type	Parent Group
2	Akara	Akara	1		
3	Human Resources	org_2	1		Akara
4	Benefits	org_3	1		org_2
5	Compensations	org_4	1		org_2
6	Marketing	org_5	1		Akara
7	Sales	org_6	1		Akara

Note: If the Benefits and Compensations groups are listed in the row **before** the Human Resources group, the upload would fail because both groups are subgroups of the Human Resources group. To add either group to the system, the Human Resources group must already exist - which means it must be created first during the upload.

Grant Multiple Waivers for a Learning Program (Batch Add)

You can grant waivers to multiple assets for multiple users when you upload a completed waiver batch request. You must download and enter the information on the waiver template to grant these waivers at once.

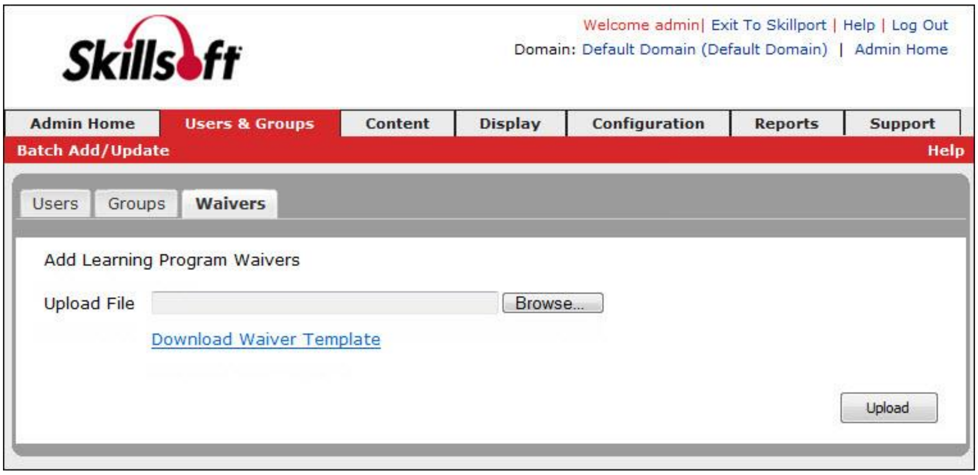
Note: You can also add or update multiple users and add or update multiple groups.

To grant multiple Learning Program asset waivers at once

1. Ensure you have properly completed the Waiver template.
2. Click **Users & Groups > Batch Add/Update** on the navigation bar.

   By default, the **Users** tab displays on the Batch Add/Update page.

3. Click the **Waivers** tab.



4. Click **Browse**.

5. Locate the waiver template .csv file and select it.

Note to Safari users: When using Safari to download the template, it downloads in TXT format, not CSV format. You must use the CSV file format for the upload.

6. Click **Upload**.

   The upload and verification process begins. If you have a valid email address associated with your Skillport credentials, an email is sent to you that contains the URL of a status report, and the date and time that the batch was submitted.

Note: Once processed, view the *Batch Uploads* report (**Users & Groups > Batch Uploads Report** on the navigation bar) to see the upload records.

Waiver CSV Template

Use the waiver CSV template to approve multiple user waiver requests for one or more assets within a specified Learning Program.

File Type

- Must be submitted in CSV format
- Must be encoded in UTF-8 format

File Names

As a best practice (not required), use a convention such as `<mycompany>_waiver_<date>.csv`, for example, `skillsoft_waiver_05312014.csv`.

Upload Guidelines

- Do not change the values in row 1 (column headers) or the import will fail.
- Data for a column must fit in one cell. See the maximum field sizes that follow.
- Enclose fields with embedded commas in quotes. Note that the quotes are not saved as part of the field value. If quotes are desired as the first and last characters of the field data, then you must enclose them with a second set of quotes. For example, to upload `"myName"`, you must enter `""myName""`.

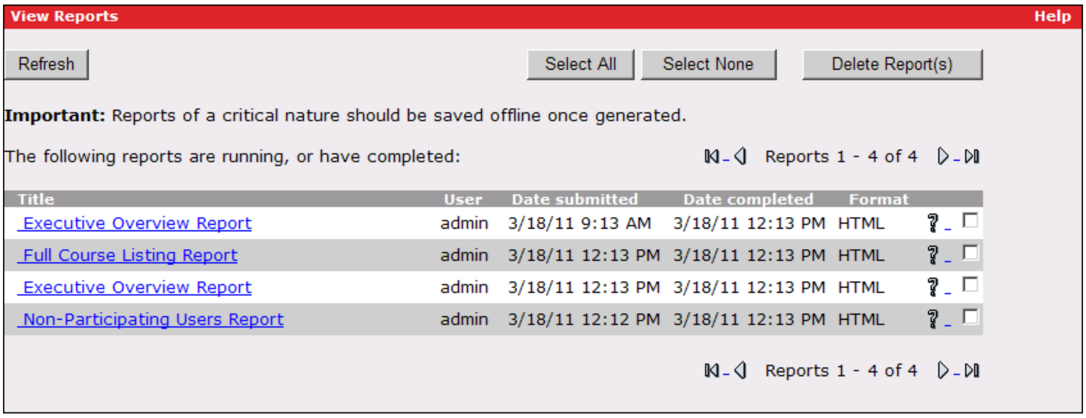
Upload Format

The following table describes each field in the waiver CSV template. All fields are required.

Field	Required?	Maximum Text Size	Description
LP Asset ID	Yes	240	The learning program asset identification number (for example, lp_leadership_001).
Asset ID	Yes	240	The asset identification number within the learning program (for example, lead_05_a06_bs_enus).
User Login Name	Yes	240	The Skillport user ID.
Reason for Waiver	Yes	240	Enter the reasons you are waiving the assets for the user.

Batch Upload Report

When you click **Users & Groups > Batch Upload Report**, the View Reports page displays.



The View Reports page is a list of currently-running reports, and generated reports that are ready for review. Select a report title to open and view the report in a new window. The report listing table shows the name of the user who ran the report, the date and time the report was submitted, when it was completed, and the format in which the report was generated.

Reports currently generating have a - (Dash) under **Date Completed** and **Format**. The course title link is not available for these reports until the report generates.

Click **Refresh** to see if the report is complete and ready for viewing.

Important Note Regarding Times Displayed in CSV Reports

You can select UTC (GMT) or Local Time for the display of certain time fields in CSV reports. Please refer to the **Configuration | Report Configuration** section for more details.

HTML report times all appear in UTC (GMT) format.

Viewing Batch Upload Reports

Note: To enhance storage utilization and maximize report performance, saved reports are only available for a maximum of 30 days. Skillsoft makes every effort to ensure that saved reports are always available during this window; however, unforeseen maintenance may result in a loss of saved reports. As a result, Skillsoft strongly recommends that you **save critical reports as soon as they are generated**.

To view and save a batch upload report

1. Click **Users & Groups > Batch Upload Report** from the top navigation bar.

   The View Reports page displays.

2. Click the name of the report you want to view.

   The report opens in a new window.

3. Select **File > Save As** to save the report.

When viewing reports, note that some reports include deactivated users, while other reports do not, as shown in the following table.

Report Type	Deactivated Users Included	Deactivated Users Not Included	Customize to Include/Exclude Deactivated Users
Full Course Listing	X		
Course Completion		X	
Custom			X
User Activity		X	
Miscellaneous Activity	X		
Course Activity Report		X	
Executive Overview	X		
Course Utilization		X	
User Listing by Group	X		
Evaluation			X
Non-Participating Users	X		
KnowledgeCenter Access			X
Leadership Advantage			X
Learning Program			X
Credentialing		X	

To delete a batch upload report

1. Click **Users & Groups > Batch Upload Report** from the top navigation bar.

   The View Reports page displays.

2. To delete individual reports:

   a. Select the check box next to the name of the report(s) you wish to delete

   b. Click **Delete**.

3. To delete all currently-displayed reports:

   a. Click **Select All**.

   b. Click **Delete**.

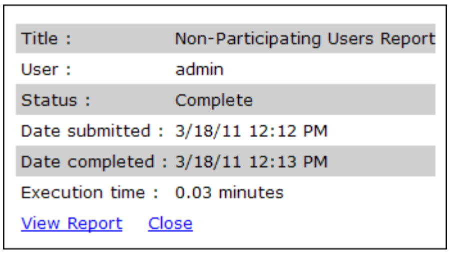
Note: Reports marked for deletion are *not* retained when paging through available report pages. You must delete reports one page at a time.

Batch Upload Report Details

To view the upload report details:

- Click next to a report title.

  The report details display in a new window:



Title :	Non-Participating Users Report
User :	admin
Status :	Complete
Date submitted :	3/18/11 12:12 PM
Date completed :	3/18/11 12:13 PM
Execution time :	0.03 minutes

View Report Close

Field	Description
Title	The report title.
User	The user ID for the Admin who requested the report.
Status	The current status of a report request. The report status indicates if the Report request has been Submitted or if the request is Complete.
Date Submitted	The date and time the report request was submitted.
Date Completed	The date and time the report request was completed.
Execution Time	The amount of time taken to generate the report.
File Name	TThe location of the generated report on the site's server.

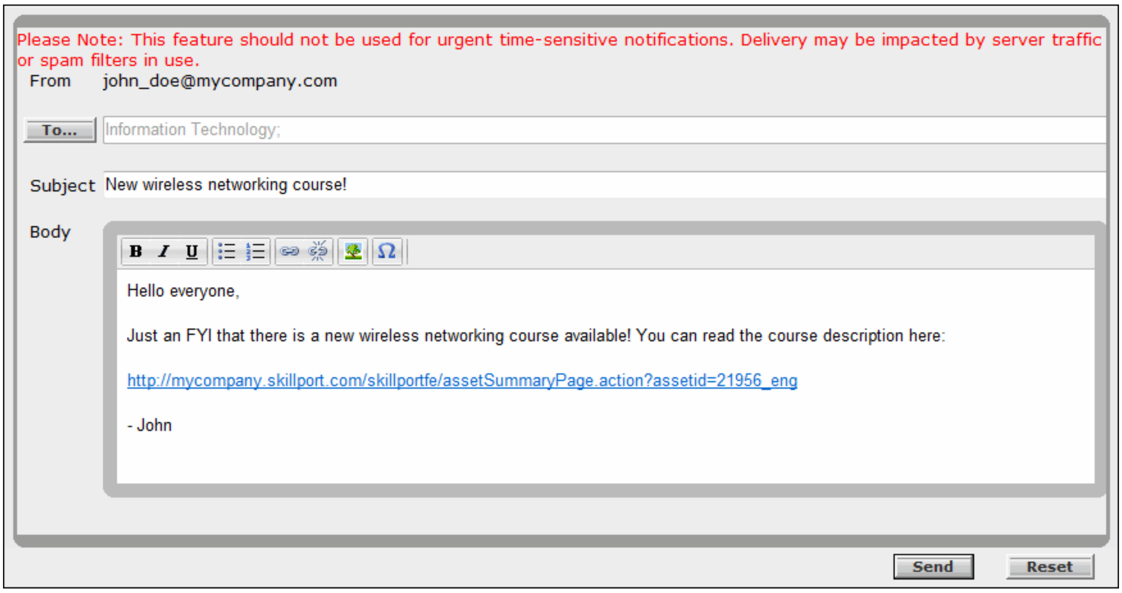
Send Email

If it is enabled on your site, you can use the Send Email page to send an email to a combination of individual users and group members. Emails sent through the Skillport system are not stored within Skillport for accessing at a later date; as an alternative, include yourself as one of the recipients so you receive and can retain a copy in your default email application.

If you have an email address set in your profile, you are identified as the sender. If you do not, Skillport uses a generic and unmonitored "sender" email address (to which users cannot reply).

Note: Do not use this feature for time-sensitive communications. For guidelines on how to test email delivery, contact your Learning Consultant or Application Engineer at Skillsoft. Skillsoft does not accept liability for non-delivery of emails due to circumstances beyond its control, such as a local network outage.

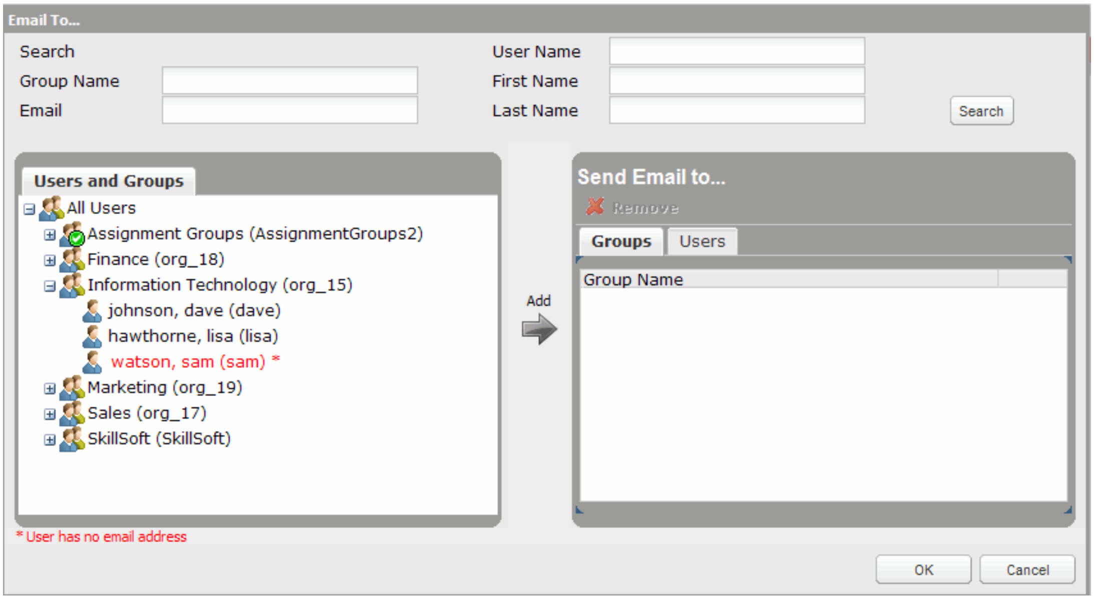
See an example email.



To send an email

1. Click **Users & Groups > Send Email** on the navigation bar.
2. Specify the users to whom to send the email.
   a. Click **To**.

   The Email To dialog box displays; in the left pane, the users and groups to which you have access privileges display.



   b. To add users to the recipient list, select the users and/or groups in the left pane, and click **Add**. Alternatively, you can drag and drop the selection into the right pane.

   If desired, you can search for a group by group name or org code, or search for a user by login name, first name, last name, or email address. Use an asterisk (*) as a wild card that represents one or more characters.

You cannot enter email addresses manually; you must select the users and groups from the group hierarchy. You cannot add individual users who do not have a defined email address; these users are highlighted in red.

If you add a group to the recipient list, both the members of the selected group and those in its subgroups will receive the email (if they have defined email addresses).

c. To remove users or groups from the email, select the users or groups in the right pane, and click **Remove**.

d. Click **OK**.

Note: There is a supporting User Management system email template called Ad-hoc Email for this page. By default, the system template is empty. However, if your site uses a custom version of this template, you may see some default but editable text on the page. While the language-specific template that is shown to you depends on the default site language of your Skillport site, you can enter text in any desired language.

3. In **Subject**, type the subject of the email. You can enter a maximum of 255 characters.

4. In **Body**, type the email message.

Note: The message can include a combination of plain text, symbols (accessible via the Ω button), hyperlinks, and images. You cannot include fields; these controls are disabled.

5. If desired, add a hyperlink.

   a. Select the text to convert to a hyperlink, and click .

   The Insert/edit link dialog box displays.

   b. In **Link URL**, enter the Uniform Resource Locator (URL).

   This value is required. The URL must be complete and begin with `http://`.

   c. In **Target**, specify whether the URL should be launched in a new browser window or the existing browser window.

   If you do not specify a value, the hyperlink is launched in a new window. This setting affects browser-based email clients only, and the recipient's own browser settings determine whether or not it is respected. Non-browser-based email clients always use a new window.

   d. In **Title**, enter a short description.

   In browser-based email clients only, this appears as a tool tip when the user moves the cursor over the hyperlink.

   Note: The **Class** setting is not used.

   e. Click **Insert**.

   The Insert/Edit dialog box closes and the hyperlink displays in the body of the email.

6. To remove a hyperlink, place the cursor on the link, and click .

7. If desired, add an image.

   a. Put the cursor in the desired location, and click .

   The Insert/edit image dialog box appears.

b. In **Image URL**, enter the complete URL for the location of the image. The image must be a JPEG or GIF file that is hosted on a web site elsewhere. In the recipient's email, the URL will render as a link that, if clicked, will display the image itself. This value is required.

c. In **Image description**, enter a description of the image. In text-only environments (browsers that cannot display inline images), this text is displayed instead of the image. This value is required.

d. In **Alignment**, select how to align the image relative to the line of text in which it is inserted. For example, select **Left** to align the image with the left margin and have the text wrap around the image's right side.

e. In **Dimensions**, enter in pixels the size (width x height) of the image if you want it to be resized before being inserted into the email.

f. In **Border**, enter in pixels the width of the border to add around the image.

g. In **Vertical space**, enter in pixels the width of the padding to add before and after the image.

h. In **Horizontal space**, enter in pixels the width of the padding to add to the left and right of the image.

i. Click **Insert**.

1. If desired, format the text using the toolbar buttons in the **Body**.

2. Click **Send**, and then click **OK**.

   The email is sent immediately. However, there may be a delay in when it is received, based on the number of recipients and other email being processed. You will receive a confirmation email when your email is sent. See ***Non-Customizable Emails*** on page 432 for an example of what this email contains.

CHAPTER 3
Content

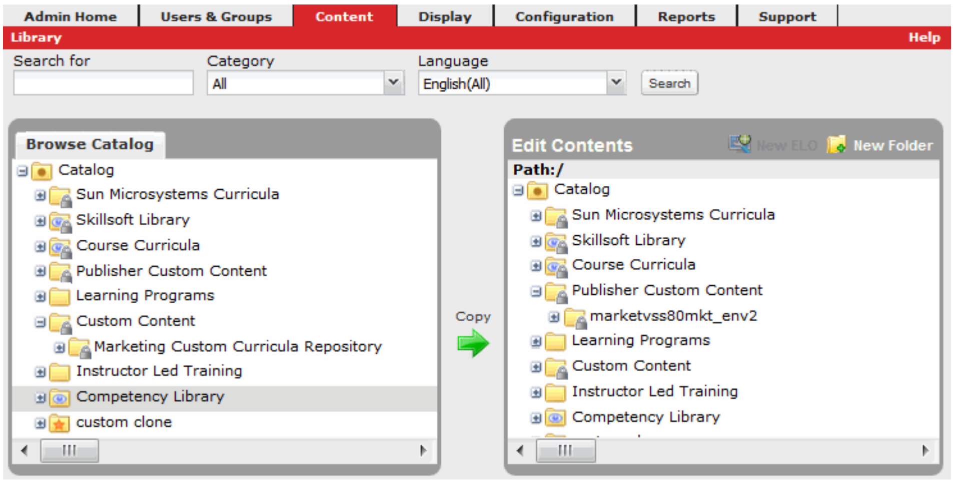
In This Chapter

Library

The Library

As a Skillport user with an admin or manager role, you can:

- Manage the library by working with the assets in Skillsoft's two stock content catalogs (Skillsoft Library and Course Curricula catalogs) as well as all custom content.
- Organize the content to create any number of custom libraries. Each ***root folder*** on page 228 (top-level folder) in the Catalog is an independent library that can be created for different purposes, such as job roles or compentency skills to optimize content for learner browsing and for admin catalog assignment and entitlement purposes. For examples, see Examples of Library Organization.



The Library page has three main areas:

- **Search panel:** Use this panel at the top to specify the search criteria when you search for folders and assets. (For more information on this search tool, see ***Search for Assets and Folders*** on page 14.)
- **View Contents pane:** Use this left pane to browse the Catalog in its current state or to browse the results of a search. For convenience, you can also use this pane to quickly rename or remove custom folders.
- **Edit Contents pane:** Use this right pane to edit the contents of a folder, that is, to add or remove learning assets; to create, rename, remove, or reorganize the contents a folder; or to create, edit, or delete an external learning object (ELO).

Note: A user cannot see any stock or custom content in the Library until you **assign** it to him or her directly or to a group of which he or she is a member. To access the interface with which to assign content to groups and individual users, click **Users & Groups > User Management** on the navigation bar.

Library Workflow

To set up the Library

1. Customize the order and grouping of content from within the stock and custom content folders to best meet your organization's learning goals and objectives.

2. Create browse views for learners to group content according to your preferred browsing metaphors.

3. Create ***Featured Topic folders*** on page 225.

4. Assign the Curator role as a custom privilege to one or more learners. Curators can add and remove content from the Featured Topics area via the learner user interface (UI).

5. Create a series to explicitly order content and convey (but not enforce) a preferred completion order.

   Note: If you want to enforce an order of completion for content, create a learning program.

6. Hide (or unhide) specific assets to display only relevant content for your organization.

After you have organized your library content, you need to entitle and/or assign the content to learners.

To make content available to learners

1. Entitle content to learners.

2. Assign content to your learners' Assigned Learning tab.

3. Assign content to your learners' Development Plan set.

Library Permissions

Permissions by Admin Type

- Company admins can view all content available for your site.
- Admins and managers can view all content that they are entitled to view, i.e., all content that has been assigned to them.
- Unscoped admins can create root folders (same as 7.x), and hide/unhide assets
- Any admin can create new folders, series, and Featured Topic folders, as well as copy, move and remove assets and folders.

Permissions for Folders

Action	Stock Folder	Linked Folder (top folder)	Linked Folder (subfolder)	Custom Folder
Copy	x	x	x	x
Move		x		x
Remove		x		x
Unlink		x		
Hide	x	x	x	x
Unhide	x	x	x	x

Add a custom folder		x	x	x
Remove a custom folder		x	x	x
Edit contents		x	x	x
Edit properties		x	x	x

Permissions for Assets

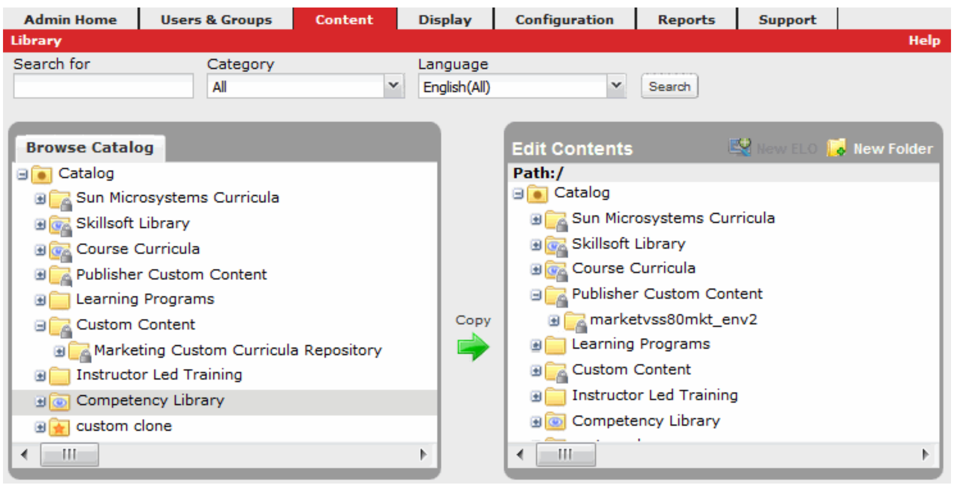
Action	Stock Asset in Stock Folder	Stock Asset in Linked Folder	Stock Asset in Custom Folder	Linked Asset in Linked Folder	Custom Asset	External Learning Object (ELO)
Copy	x	x	x	x	x	x
Move					x	x
Remove		x	x	x	x	x
Delete						x
Hide			x		x	x
Unhide			x	x	x	x
Unlink						
Edit properties					x	x

Browse the Catalog

To browse the Catalog

1. Click **Content > Library** on the navigation bar.

   The Library page displays.



Use the left pane to browse the Catalog in its current state or to browse the results of a search.

Use the right pane to edit the contents of a folder. You can add or remove learning assets; create, edit, remove, or reorganize the contents of a folder; or create, edit, or delete an external learning object (ELO).

2. Browse the contents of the Catalog and examine its structure by expanding and collapsing the folders in the left pane.

Note: Folders whose contents cannot be modified are shown with a locked icon ( ).

Search the Catalog

To search the Catalog

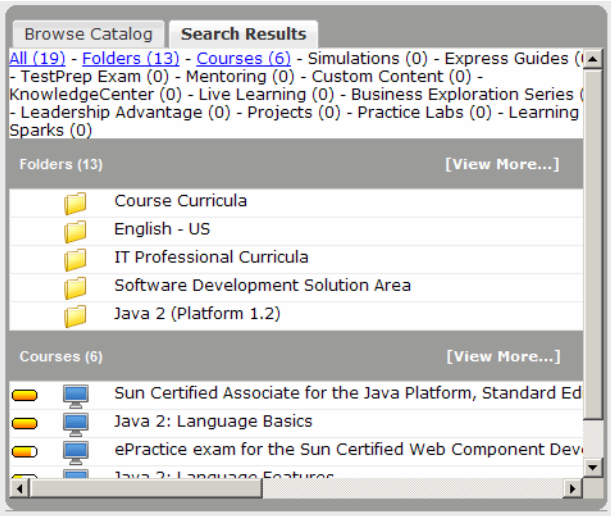
1. Click **Content > Library** on the navigation bar.

   The Library page displays.

2. In the search fields at the top of the page, enter your search criteria, and click **Search**.

Note: For detailed information on the search tool, including tips on creating search expressions, see ***Search for Assets and Folders*** on page 14.

Both the folders and assets that match your specified criteria are displayed on the **Search Results** tab in the left pane, as shown below in an example search for the term "java".

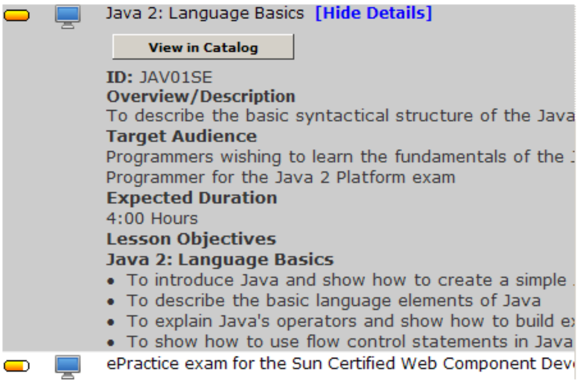


3. To filter the search results to show only a certain type of asset, click the corresponding category link at the top of the results.

4. To view more search results for a given category, click **View More** (shown above) for that category. Depending on the number of items returned and how the ***search settings*** (on page 479) for your site are configured, there may be multiple pages of search results.

5. To view more information about an asset, move your mouse over the asset title, and click **Show Details**.

If you want to identify the location of the asset in the Catalog, click **View in Catalog** (shown below). This returns you to the **Browse Catalog** tab with the Catalog opened to the location of the asset (and with the asset selected so you can easily add it to a folder in the Edit Contents pane using drag-and-drop).



Note: Folders whose contents cannot be modified are shown with a locked icon ( ).

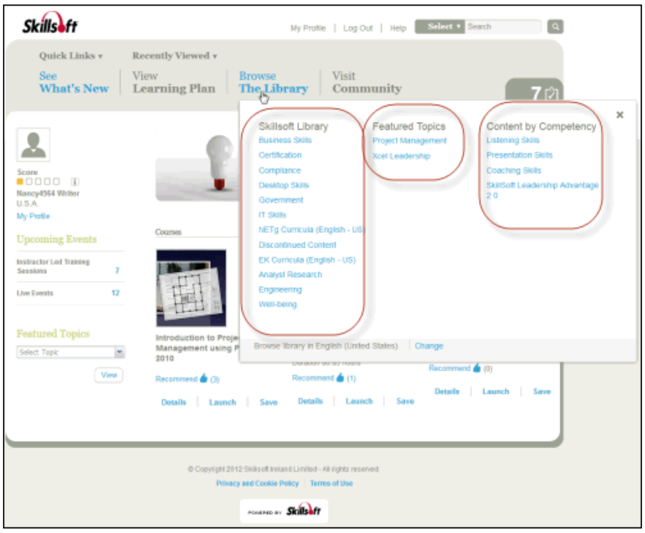
Working with Browse Views

A **browse view** is a custom view folder created to:

- Optimize content for learner browsing.
- Optimize the content for administrator entitling and promotion.

You can designate up to three browse views to display in the learner user interface in the **Browse the Library** link. The sub-folders in a browse view are presented to learners as topics and sub-topics in the Library.

Browse views use an organizing principle that is useful for specific types of browsing, such as by job role, competency, or vendor. However, you might also create browse views that highlight specific types of learning content, align with training objectives, or other organizational objectives. See an example here.



Browse View Workflow

A browse view is an organization of content displayed to learners as a column in the **Browse the Library** menu in Skillport Learner. You can create a browse view to organize content specific to your organization.

To create a browse view

1. Create a custom view folder.

a In Skillport Administrator, click **Content > Library** on the top navigation bar.

The Library page displays.

b In the Edit Contents pane, click **New Folder**.

The New Root Folder dialog box displays.

c Complete the required folder fields.

For more information about these fields, see ***Create a Root Folder*** on page 228. Note that the **Name** displays as the title of the browse view, and is visible to learners in Skillport Learner.

d Select the **This is a Browse View** check box.

> **Note:** Selecting this flags the custom view to display as an available Browse View on the Designate Browse View page in Skillport Administrator.

e Click **Save**.

The New Root Folder dialog box closes, and the Library page refreshes, displaying the custom view (the new root folder) in the Browse Catalog pane.

2. Add content to the custom view folder.

f In the Browse Catalog pane, hover your mouse over the custom view folder.

g Click the **Edit Contents** link that displays.

The custom view folder displays in the Edit Contents pane.

h In the Browse Catalog pane, locate the content folder(s) you wish to include in the custom view folder.

i Click the folder to highlight it.

j Click **Copy**.

The content copies into the custom view folder and saves automatically.

3. Ensure the users you wish to access this custom view folder are entitled to the content.

k Click **Users & Groups > User Management** on the navigation bar.

l In the left panel, select the user or group to which you want to entitle content.

m In the right panel, click the **Catalog Assignment** tab.

n Locate the content you added to the custom view folder in the **Catalog Assignment** tab.

> **Note:** If the content displays in the **Catalog Assignment** tab, the content is entitled and your user(s) can view the content when the Browse View is enabled. If the content does not display, it is not yet entitled to the user or group.

o If necessary, entitle the content:

a. Click **Override Inherited Assignment** (if a user) or **Edit Group Assignments** (if a group).

The Catalog Assigner dialog box displays.

b. In the Browse Catalog pane, click the custom view you created to highlight it.

c. Click **Add**.

> **Note:** Ensure you add all the content to which you want the user entitled. Modifying a user's individual assignments removes the group entitlements, and only the content within the user's Catalog Assignment folder is available to him when he browses or searches the Library.

4. Designate the custom view as a Browse View.

p Click **Content > Designate Browse View.**

q Select which view you want the custom view to display:

- **Primary View:** This is the default view displayed to learners, and it displays as the first column in the browse view.
- **Alternate View 1:** The view displays as the second column in the browse view.

- **Alternate View 2:** The view displays as the third column in the browse view.

r In the drop-down menu, select the custom view folder you wish to display as a browse view to learners.

s Click **Save**.

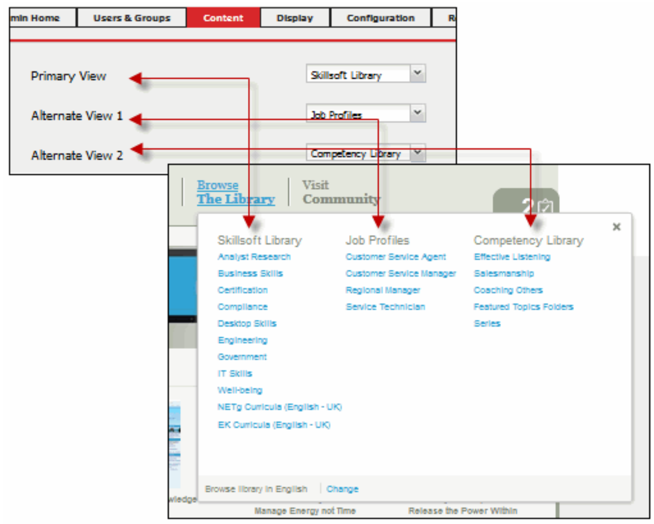
The browse view displays the next time a learner signs into Skillport.

Important Information About Browse Views

A **browse view** is a top-level folder that can be created to:

- Optimize content for learner browsing.
- Optimize the content for admin entitling and assigning.

You can designate up to three browse views to display in the **Browse the Library** link in Skillport Learner.



Browse views are useful for browsing by organizational needs such as job roles, competencies, or vendors. However, you might also create browse views that highlight specific types of learning content, align with training objectives, or suit another purpose.

It is important to understand the following regarding browse views:

- All top-level folders in the Catalog—including those designated as browse views—are displayed in all of the areas of Skillport Administrator in which you assign content to users, for example, in the Learning Plan Assignment interface.
- A learner cannot automatically view all of the assets in a browse view, only those she is assigned and entitled to see.
- Because you can assign assets that are *not* included in a browse view, a browse view does not necessarily provide access to the learner's full entitlement. For example, the learner can also access and launch content in the following manners provided she is entitled to it:
  - She performs a search.
  - She receives an email containing the URL for accessing an asset.

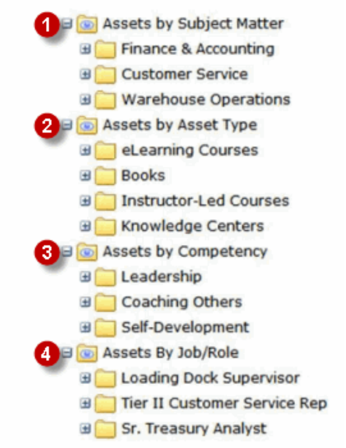
- She is assigned an asset in her learning plan by her manager, and she receives a reminder email about the assignment that contains the URL for accessing the asset.
- She clicks an asset that is shared by a community member via the Community activity stream.

- In order to enforce proper display in the Library, a browse view cannot contain assets directly within it. All assets must be located in a folder within the Library.
- You can designate an unlimited number of top-level folders as browse views. However, you can only have 3 active browse views at a time. For more information, see Designate the Library's Browse Views.

Note: Browse views are available across the entire site for all users and groups, including ***Advanced Groups*** on page 46.

Examples of Library Organization

You can organize the catalog content in ways to create unique libraries that align content with your organization's training goals. You can create custom libraries that optimize learner search and browse, as well as separate libraries solely for the purpose of entitling and assigning content. Below are examples of ways to arrange assets by different subject or role metaphors.



- **Assets by Subject Matter**: You can organize content based on pure subject areas.
- **Assets by Asset Type**: Group together like assets, such as courses, books, videos, instructor led training, and live events.
- **Assets by Competency**: Arrange content into competency categories.
- **Assets By Job/Role**: Create libraries custom curated for specific job functions and roles within your organization.

Browse Views vs. Entitlement Views

There are two distinct types of views of content that you can create when organizing your library: browse views and entitlement views. Browse views allow learners to browse for content, while entitlement views facilitate assigning and entitling content to learners.

A **browse view** is a type of library view that:

- Is specified as a browse view in the root folder properties.
- Is eligible to be exposed to learners (up to a maximum of three browse views) when they select **Browse the Library** from the top of the Skillport home page.
- May be created solely for the purpose of organizing and facilitating catalog and learning plan assignments.
- Is visually indicated in the Library Manager by the icon.

Although you can create unlimited browse views, you can only designate up to three browse views at a time to be exposed in the Browse the Library area in Skillport.

Note: Learners will only see content to which they are entitled in browse views.

A learner's entitlement is content entitled to them via the catalog assigner or the learning plan assigner.

An **entitlement view** is a type of library view that:

- Groups content together for entitlement or assignment purposes.
- Will not appear in **Browse the Library** in the Skillport learner user interface (UI).

Assets can be catalog-assigned and entitled to a learner but not contained within any of the three exposed browse views. If this is the case, then:

- A learner will not find the asset by browsing the library.
- A learner can find the asset via Search.
- A learner may see the asset in their learning plan (if assigned) and/or learning transcript (if previously launched).

Create a Custom View Folder

You can create a custom view folder, combining stock and custom content, for one of two purposes:

- To designate as a custom browse view that can be exposed to learners from the **Browse the Library** link in Skillport.
- To serve as a custom entitlement view for assignment purposes.

To create a custom view folder

1. Click **Content > Library** on the navigation bar.

   The Library page displays.

2. ***Create a root folder*** on page 228 and, if desired, specify it as a browse view in the folder properties. You can also edit an existing root folder's properties and set the folder as a browse view.

3. ***Copy folders of content and/or individual assets*** on page 232from various folders into your custom view folder. To further customize your browse view, you can also hide/unhide content. Hiding/unhiding content is a site-wide action, and will affect all locations in the Library that contain this content.

   Note: Copying stock folders into a browse view creates linked folders that maintain a dynamic relationship with its parent folder, inheriting all updates to the parent folder.

4. If your custom view folder is to be a Browse View, click **Content > Designate Browse Views** to designate the custom view as one of the browse views that you want to expose to learners in **Browse the Library**.

5. If your custom view folder is for entitlement purposes, then you must entitle or assign the view to learners so that they can find the content in Skillport.

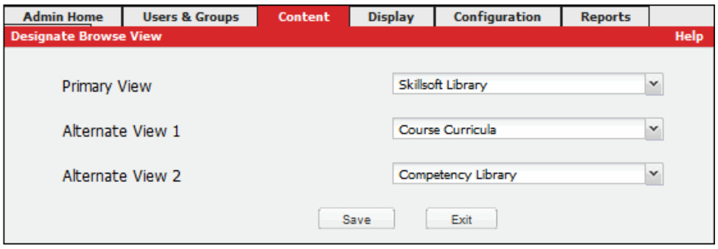
Designate the Library's Browse Views

The Library can have only 3 active browse views at any given time. These browse views designate the content that will appear in the **Browse the Library** area in the Skillport learner user interface (UI). Folders that you create as browse views are identified with a browse view folder icon ( ).

To designate the Library's browse views

1. Click **Content > Designate Browse Views** on the navigation bar.

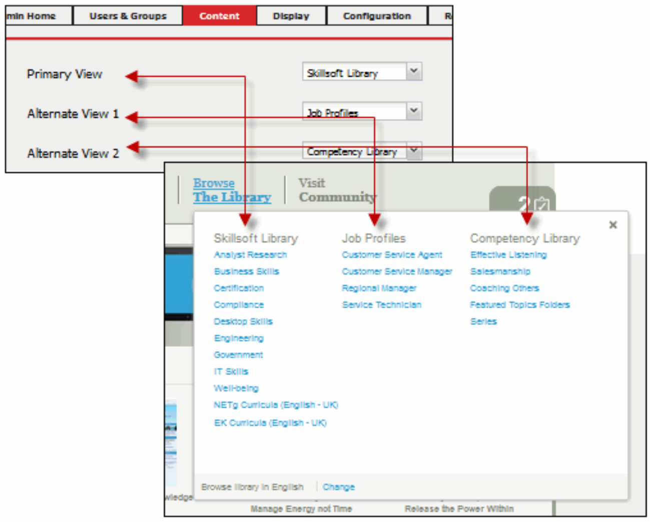
   The Designate Browse View page displays.



2. Select a view for each of the following settings. You can select from the stock view provided by Skillsoft and all of the custom views that you have created and specified as browse views.

   - **Primary View**: This is the default view shown to learners, and it appears as the first option in the browse menu.
   - **Alternate View 1**: (Optional) If you select a view for this setting, the view appears as the second option in the browse menu.

- **Alternate View 2**: (Optional) If you select a view for this setting, the view appears as the third option in the browse menu.



3. Click **Save**.

Note: Browse views are available across the entire site for all users and groups, including Advanced Groups.

Designate the Library's Featured Topics

You can designate a subfolder of a browse view as a Featured Topics folder. Featured topics display in the Featured Topics area on the What's New page in Skillport Learner.

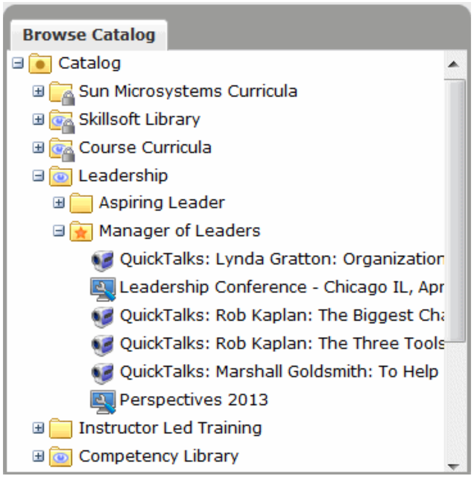
Note: Featured topics folders must be the lowest subfolder of the browse view folder structure. See the image below.

To designate the Library's Featured Topics

1. In a browse view folder, create a ***custom subfolder*** on page 229 and designate this folder as a Featured Topics folder. In the example below:

- **Leadership** is a browse view folder.
- **Manager of Leaders** is a Featured Topics folder.

  For more information on folder icons, see Folder Icons.



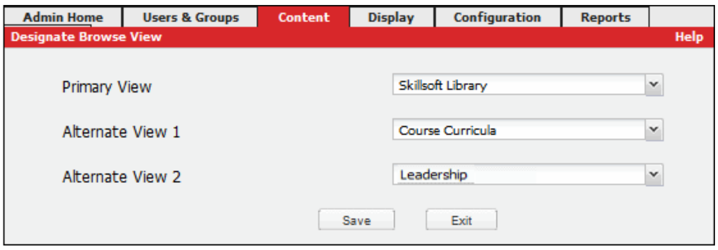
1. Copy assets into the Featured Topics folder.

   Note: Do not include child folders in a Featured Topics folder as assets contained within child folders will not display.

2. Click **Exit** to exit the Library and save your changes.
3. Click **Content > Designate Browse View**.

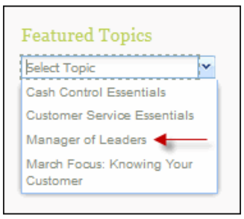
   The Designate Browse View page displays.

4. Select the browse view folder as one of the three exposed browse views.



5. Click **Save.** The browse view folder containing the featured topics folder is saved as one of the three exposed browse views. Learners can view these by clicking **Browse the Library** in Skillport.

To view the changes, open Skillport Learner. The content within the featured topic folder displays in the Featured Topics dropdown menu on the What's New page in Skillport Learner.



Working with Folders

Note: The Library contains all stock and custom content installed on your Skillport site. You can organize this content into one or more libraries to optimize learner browsing and searching, and to facilitate the entitling and assigning of content.

Folder Overview

As you customize the Catalog into libraries to meet your organization's needs, you work with several types of folders:

- **Stock folder**: A folder of content created by Skillsoft.
- **Root folder**: A folder in the top level of the Library under the Catalog folder. A root folder can be designated as a browse view.
- **Custom folder**: This is a folder you create that is not linked to a stock folder. The contents of the folder are not affected by changes to the contents of any other folder.
- **Linked folder**: A *copy* of a stock folder that maintains a *dynamic* relationship to the stock folder. If the contents of the stock folder are changed in any way (additions, changes, and deletions to the assets and child folders therein), the copies in the linked folder are automatically updated in the same manner. You cannot reorder the linked subfolders or linked assets within a linked folder; they remain at the top of the folder. However, you can add custom folders and custom assets to the bottom of the linked folder.

  If Skillsoft removes a stock folder in the Library for which you have a linked folder, the following occurs:

  - The linked folder becomes a custom folder (that is, the dynamic relationship is broken). If there are no custom assets in the folder, the folder is removed entirely.
  - All linked assets are removed.
  - All custom assets are preserved.

For information about icons used to represent folders, see Folder Icons.

Folder Behaviors

- **Normal:** Any folder you create that is not a series folder or a featured topic folder.
- **Series**: A *series* is a folder of assets whose order of completion is prescribed for learners. A series can contain assets of different types (courses and related resources). A series cannot contain subfolders.

  A series is often used to:

  - Group related assets together (for example, the assets required to obtain a certification).
  - Maintain a specific order when displayed in the Library. Unlike a learning program, a series cannot be completed, but the assets within a series may be completable.

  When a learner views the assets in a series in the Library, he views them in the fixed order determined by the creator of the series. In contrast, when he views other assets, he views them sorted and displayed by the first date they were published. Assets for which this publication information is not available are displayed last and in alphabetical order.

- **Featured Topic folder**: You can designate a subfolder of a ***browse view*** on page 221 as a *featured topic* folder. These folders display as featured topics on the What's New page in the Skillport Learner interface. Users with the role of End User or higher and the Curator custom user privilege can add assets to featured topics using the Skillport Learner interface. Folders of this type cannot contain any series folders or subfolders.

  For more information, see ***Designate the Library's Featured Topics*** on page 225.

Support for Multiple Languages

Every folder has the following:

- A specified default language and a corresponding folder name in that language.
- (Optional) One or more additional languages specified and corresponding folder names in those languages.

Note: You must provide the additional language folder names. They are not auto-generated.

In the learner interface, a learner views the folder name that matches the language in which he is currently browsing the Library. In the administrator interface, an administrator views the English-language folder name if it is available. Otherwise, he views the folder name specified for the default language.

For more information, see ***Create a Custom Folder*** on page 229 and ***Create a Root Folder*** on page 228.

Create a Root Folder

You can create a new root folder to be a repository for a custom library. This allows you to structure the Library to optimize learner browsing, and to optimize administrator tasks, such as entitling content to users and groups, and assigning assets.

To create a root folder

1. Click **Content > Library** on the navigation bar.

   The Library page displays.

2. In the Edit Contents pane, select the top-level **Catalog** folder, and then click **New Folder**.

3. In the New Root Folder dialog box, specify the properties of the folder:

   - **Default Language**: The default language of the folder.
   - **Name**: (Required) The name of the folder in the selected default language. You can enter a maximum of 255 characters. All printable characters, including double-byte characters, are accepted.

     If a learner is entitled to content in the folder, he sees the folder represented as a category in the Library. If the learner's content language (specified in his profile) does not match any of the folder's alternate languages, this name is shown.

   - **Alternate Languages**: If your site is configured to support it, you can specify localized folder names.

   a. In the Alternate Languages section, click **Add**.

      The Add Languages dialog box displays.

b. In **Language**, select the desired language.

c. In **Name**, enter the text (in the selected language) that you want to display in the user interface.

d. Click **OK and Add Another** to specify another label, or click **OK** to save the label.

4. If you want the folder to be a ***browse view*** on page 221, select **This is a Browse View**.

Note: You cannot add assets directly to a browse view folder; you must add them to its subfolders.

5. Click **Save**.

The folder is created, and you can now populate it with subfolders and assets as needed. Empty folders do not display in the Library. For more information, see ***Copy Folders and Assets into Other Folders*** on page 232.

6. Click **Exit**.

Note: The Library is not updated with your changes until you exit the Library page.

Create a Custom Folder

You can create a custom folder in any folder whose contents can be modified. If a folder's contents cannot be modified, the folder is shown with a locked icon ( ).

A custom folder can be:

- A subfolder of a root folder, to contain assets for browse views
- A subfolder of a linked folder
- A subfolder of a normal folder (not a series or featured topic folder)

To create a custom folder

1. Click **Content > Library** on the navigation bar.

   The Library page displays.

2. In the Browse Contents pane, browse to or search for the folder in which to create the custom folder.

3. Move your mouse over the folder title, and click the **Edit Contents** link.

   The selected folder is displayed in the Edit Contents pane.

4. In the Edit Contents pane, click **New Folder**.

5. In the New Folder dialog box, specify properties of the folder:

   - **Default Language**: The default language of the folder.
   - **Name**: (Required) The name of the folder in the selected default language. You can enter a maximum of 255 characters. All printable characters including double-byte characters are accepted.

If a learner is entitled to content in the folder, the learner sees the folder represented as a category in the Library. If the learner's content language (specified in his profile) does not match any of the folder's alternate languages, this name is shown.

- **Description**: A description of the folder's contents. You can enter a maximum of 4,000 characters. All printable characters including double-byte characters are accepted. Learners can view the description using the **View Description** link at the top of the category.

6. If your site is configured to support it, you can specify localized folder names:
   a. In the Alternate Languages section, click **Add**.

      The Add Language dialog box displays.
   b. In **Language**, select the desired language.
   c. In **Name**, enter the text (in the selected language) that you want to display in the user interface.
   d. In **Description**, enter a a description of the folder.
   e. Click **OK and Add Another** to specify another label, or click **OK** to save the label.
7. Specify the folder type as a **Normal Folder**, **Featured Topic Folder**, or **Series**.

   See Folder Overview for more information.
8. (For series folders only) To specify a custom image to use for the series folder, click **Use custom image**. Then, click **Add**, click **Browse** to navigate to the desired file, and click **Upload**.

   The image file must be a .gif, .png, or .jpg file, and can have a maximum size of 5 MB.
9. Click **Save**.

   The folder is created, and you can now populate it with subfolders and assets as needed. Empty folders do not display in the Library. For more information, see ***Copy Folders and Assets into Other Folders*** on page 232.
10. Click **Exit**.

Note: The Library is not updated with your changes until you exit the Library page.

Rename a Folder

You can rename a root folder or a custom folder, but you cannot rename a folder provided with the stock Catalogs.

To rename a folder

1. Click **Content > Library** on the navigation bar.

   The Library page displays.
2. In the Edit Contents pane, navigate to the folder that you want to rename.
3. Move your mouse over the folder title, and click the **Edit** link.
4. In **Name**, enter a new name for the folder.

The folder name can be a maximum of 255 characters, and all alphanumeric and special characters that you can enter using the keyboard are permitted except for double-quotes ("") and the backslash (\). In addition, the name must be unique with respect to all other folders in the same location in the Catalog. However, case-sensitivity is considered when determining uniqueness; for example, "Sample Curricula" and "Sample curricula" are considered two unique names.

5. Click **OK**.

6. Click **Exit**.

Note: The Library is not updated with your changes until you exit the Library page.

Unlink a Linked Folder

Unlinking a linked folder permanently breaks the dynamic relationship that exists between it and the original, stock folder. The unlinked folder becomes a static "snapshot" of the stock folder at the time that you unlink it. If the linked folder has linked subfolders, they too are unlinked.

You can only unlink a top-level linked folder. If you want to create a static copy of a subfolder, you must first copy that subfolder to a custom folder (so that it becomes a top-level folder), and then unlink that newly-created linked folder.

Unlinking a linked folder is a permanent action; you cannot undo it.

To unlink a linked folder

1. Click **Content > Library** on the navigation bar.

   The Library page displays.

2. In the Browse Catalog pane, browse to or search for the folder that you want to unlink. Note that a linked folder can only be unlinked at the folder level where the original link was created.

3. Move your mouse over the folder title, and click the **Unlink** link. A Warning dialog displays asking you to confirm the unlink action.

4. The folder, and any linked subfolders, are now unlinked.

5. If desired, you can now edit, remove, or hide/unhide the folders.

6. Click **Exit**.

Note: The Library is not updated with your changes until you exit the Library page.

Edit a Folder's Properties

When editing folder properties, be aware of the following:

- You can change a normal folder to a featured topic folder if the normal folder contains no subfolders. You can also change a featured topic folder to a normal folder.
- A series folder must always be created from scratch. You cannot change a normal folder or a featured topic folder to a series folder, nor can you change a series folder to a normal folder or a featured topic folder.
- A root folder can be changed to a browse view only if it contains no assets directly within it. All assets must be located in subfolders.
- You can remove a folder's designation as a browse view only if it is not currently an active ***browse view*** on page 221 in the Library.

To edit a folder's properties

1. Click **Content > Library** on the navigation bar.

   The Library page displays.
2. In the Edit Contents pane, navigate to the folder you want to edit.
3. Move your mouse over the folder name and click **Edit**.
4. Edit the folder's properties as desired.

   Depending on the selected folder type, the folder properties will differ. For folder property descriptions, see ***Create a Custom Folder*** on page 229 and ***Create a Root Folder*** on page 228.
5. Click **Save**.
6. Click **Exit**.

Note: The Library is not updated with your changes until you exit the Library page.

Copy Folders and Assets into Other Folders

You can copy existing folders and assets into any other folder whose contents can be modified. If a folder's contents cannot be modified, the folder is shown with a locked icon (). Folders from the stock Catalogs are locked.

Although you cannot modify the folders in the stock Catalog, you can copy their contents into custom folders, which you can then modify by removing and reorganizing the copies.

You can copy a stock, linked, or custom folder to any of the following destinations:

- A normal, custom folder.
- A linked folder.

Note: Series folders and Featured Topic folders cannot contain subfolders.

If you copy:

- A **stock** folder, then the copy becomes a **linked** folder.
- A **custom** folder, then the copy also becomes a **custom** folder. The new copy does not have a dynamic relationship with the custom folder that you copied. If the source folder contains any linked folders, the new copy also contains linked folders that are also linked to the original stock folders.
- A **linked** folder, then the copy becomes a **linked** folder that is also linked to the original stock folder. The new copy does **not** have a dynamic relationship with the linked folder that you copied.

Note: If the contents of the stock folder are changed in any way (additions, changes, and deletions to the assets and child folders therein), the copies in the linked folder are automatically updated in the same manner.

To copy folders and assets into a folder

1. Click **Content > Library** on the navigation bar.

   The Library page displays.
2. In the Browse Catalog pane, browse to or search for the folder into which you want to copy one or more folders or assets.
3. Move your mouse over the folder title, and click the **Edit Contents** link.

   The selected folder is displayed in the Edit Contents pane.
4. In the Browse Catalog pane, browse to or search for the folders or assets that you want to copy, and then select them.

   Note: To select multiple folders or assets, use Shift-click or Ctrl-click. Also note that you can select a combination of folders and assets, not just one or the other.
5. Drag and drop the selected folders and assets in the Browse Catalog pane to the desired folder in the Edit Contents pane. If you move your mouse over a collapsed subfolder, it automatically expands to allow you to drop the assets inside.

   Alternatively, you can select folders and assets in the Browse Catalog pane, select a destination folder in the Edit Contents pane, and then click .
6. Click **Exit**.

   Note: The Library is not updated with your changes until you exit the Library page.

Reorder Folders and Assets

You can reorder the folders and assets in any folder whose contents can be modified. If a folder's contents cannot be modified, the folder is shown with a locked icon ().

To reorder the folders and assets in a folder

1. Click **Content > Library** on the navigation bar.

   The Library page displays.

2. In the Browse Catalog pane, browse to or search for the folder in which you want to reorder subfolders and assets.
3. Move your mouse over the folder title, and click the **Edit Contents** link.

   The selected folder is displayed in the Edit Contents pane.
4. In the Edit Contents pane, select the folder or asset that you want to move, then drag and drop it to the desired location inside of the folder.
5. Click **Exit**.

Note: The Catalog is not updated with your changes until you exit the Library page.

Remove Content from a Folder

You can remove content from any folder whose contents can be modified. If a folder's contents cannot be modified, the folder is shown with a locked icon ( ). Folders from the stock Skillsoft Library are locked.

You can remove the following types of content:

- An instance of an asset from the stock Library that you have copied into a custom folder. Removing the copy does not affect the original asset in the stock Library.
- A custom asset in a custom folder. If this is the only instance of the asset in the Library, this removes the asset from both the Library and the Catalog view on the Library page in the Administrator UI. However, it does not permanently delete the asset from your site; the asset remains in an Active state in the Content Installer. This is the case regardless of how the custom content was initially installed (Content Installer or Skillsoft Publisher). To permanently remove custom content, contact your Skillsoft account team representative for assistance.

To remove content from a folder

1. Click **Content > Library** on the navigation bar.

   The Library page displays.
2. In the Browse Catalog pane, browse to or search for the folder that contains the learning asset that you want to remove.
3. Move your mouse over the folder title, and click the **Edit Contents** link.
4. In the Edit Contents pane, move your mouse over the asset you want to remove, and click the **Remove** link.
5. Click **OK** to confirm the removal.
6. Click **Exit**.

Note: The Library is not updated with your changes until you exit the Library page.

Remove a Folder

You can permanently remove custom folders from the Catalog. However, you cannot remove any folders provided with the stock Catalog or linked contents in a linked folder.

Removing a custom folder from the Catalog also permanently removes all child folders and learning assets in the folder. If the folder's contents include custom assets that are not located elsewhere in the Catalog, this permanently removes them from the site. Before removing a folder, carefully examine its contents and copy any custom assets to a different folder, if necessary.

To remove a folder

1. Click **Content > Library** on the navigation bar.

   The Library page displays.

2. In the Edit Contents pane, navigate to the folder that you want to remove.
3. Move your mouse over the folder title, and click the **Remove** link.
4. In the Warning dialog box, click **OK** to confirm the removal.
5. Click **Exit**.

   Note: The Library is not updated with your changes until you exit the Library page.

Folder Icons

The following table identifies the folder icons that you see on the Library page.

Icon	Description
Catalog Folder	
	Top-level folder that represents the overall Catalog
Browse Views (always root folders)	
	Stock "browse view" folder
	Linked "browse view" folder (top-level folder)
	Custom "browse view" folder
Normal Folders	
	Stock folder
	Linked folder (top-level folder)
	Linked subfolder (subfolder)
	Custom folder
Series Folders	
	Stock series
	Linked series (top-level folder)
	Linked series (subfolder)

	Custom series
Featured Topics	
	Stock "featured topic" folder
	Linked "featured topic" folder (top-level folder)
	Linked "featured topic" folder (subfolder)
	Custom "featured topic" folder

Working with Series

You can create a series to present assets in a fixed order and suggest an order of completion but, unlike a learning program, series do not enforce a completion order.

Series are created in a custom folder that you designate a series folder.

Important Information about Series

A *series* contains specifically-ordered assets whose order is important for learners. A series can contain assets of different types. It is often used to:

- Group related assets together (for example, the assets required to obtain a certification).
- Maintain a specific order when displayed in the Library.

A series itself cannot be completed, but the assets within the series may be completable.

As you work with series folders, note the following:

A series can:

- Provide a higher profile presentation of a content set.
- Implicitly convey an order of completion.
- Have its own image.
- Only contain certain asset types. (See Types of assets you can add to a series, below.)

A series cannot:

- Force a learner to complete assets in a certain order. If you want to do this, create a learning program.
- Contain other folders.
- Be a Featured Topics folder.
- Flip between series and non-series folder designation.

Types of assets you can add to a series

- Courses
- Simulations
- LLC
- Assessments
- Learning Programs
- Business Impact & Challenges
- Learning Sparks
- Projects
- Practice Labs
- Mentoring
- Express Guides

Series subsets

A *series subset* is a grouping of specific items within a series.

Note: A series subset is live - any asset added to the series displays to learners when they next sign in.

Create a Series

You can create a series, which is a folder of content that you explicitly order to suggest a specific order of completion. You can assign a custom image to the series that will display when learners view the folder when they browse the library.

To create a series

1. Click **Content > Library** on the navigation bar.

   The Library page displays.

2. In the Browse Catalog pane, browse to or search for the folder where you want to create the series folder.

3. Move your mouse over the folder title, and click the **Edit Contents** link.

   Note: The Edit Contents link only appears beside folders whose contents can be modified.

4. In the Edit Contents pane, click **New Folder**.

   The New folder dialog box displays.

5. Fill in the desired fields:

   - **Default Language**: The default language of the folder.

   - **Name**: (Required) The name of the folder in the selected default language. You can enter a maximum of 255 characters. All printable characters, including double-byte characters, are accepted.

     If a learner is entitled to content in the folder, the learner sees the folder represented as a category in the Library. If the learner's content language (specified in his profile) does not match any of the folder's alternate languages, this name is shown.

   - **Alternate Languages**: If your site is configured to support it, you can specify localized folder names.

   a. In the Alternate Languages section, click **Add**.

      The Add Languages dialog box displays.

   b. In **Language**, select the desired language.

   c. In **Name**, enter the text (in the selected language) that you want to display in the user interface.

   d. Click **OK and Add Another** to specify another label, or click **OK** to save the label.

6. Select the **Series** radio button.

7. Select one of the following:

- **Use standard image**: Uses a standard image provided by Skillsoft.
- **Use custom image**: Click **Add**, click **Browse** to locate a custom image to display to your learners when viewing the custom series folder, and then click **Upload**.

Note: Image file size is limited to 5 MB and must be .gif, .png., or .jpg formats.

8. Click **Save**. The series folder is created and is marked with the folder icon. You can now populate it with stock and/or custom assets as needed. For more information, see Copy Assets into Other Folders.

9. Click **Exit**.

Note: The Library is not updated with your changes until you exit the Library page.

Edit a Series' Contents

You can edit the content in a series by adding, rearranging, removing content from, or hiding/unhiding content in the series folder.

To edit a series' content

1. Click **Content > Library** on the navigation bar.

   The Library page displays.

2. In the Browse Catalog pane, browse to or search for the series that you want to edit.

3. At the top level Catalog folder, select **Edit Contents**.

4. In the Edit Contents pane, select the series folder and click **Edit**.

   The series folder opens and the content displays.

5. Do any of the following:
   - Reorder assets by by dragging and dropping into their desired location in the folder.
   - Remove assets by selecting the asset and clicking **Remove**.
   - Hide/Unhide assets by selecting the asset and clicking **Hide/Unhide**.

6. Click **OK**.

Note: The Library is not updated with your changes until you exit the Library page.

Remove a Series

You can remove a series, which deletes the folder and all of its contents, from the Library. The individual assets, if copied from a stock folder, still exist in the Library.

To remove a custom series

1. Click **Content > Library**.

   The Library Manager displays.

2. In the Browse Catalog pane, browse to or search for the series that you want to remove.

3. At the top level Catalog folder, select **Edit Contents**.

4. In the Edit Contents pane, select the series folder and click **Remove**.

   A warning messages displays that you are about to permanently remove the series folder and all of its contents.

5. Click **OK**.

6. The series folder is removed.

Notes: Removing a series is an unrecoverable action; you cannot undo it. The content may still be discoverable via search or browse if the asset(s) were contained in a different folder or hierarchy in the Library.

Working with Assets in the Library

What is a Stock Asset?

Stock assets are content items created by Skillsoft. These are contained in the two main Skillsoft catalog folders:

- Course Curricula (Skillsoft legacy content)
- Skillsoft Library (Skillsoft content that is unified with books and video content, and arranged by subject matter)

Actions you can take with stock content include:

- Copy stock assets from one customized library to another
- Hide or unhide stock assets within a library
- Entitle stock assets to learners, so they can search and browse for them
- Assign or deassign stock assets to learning plans, so learners have direct access in the Assigned Learning tab of their learning plans

Default icons for Skillsoft's stock assets include the following:

Icon in the Catalog (Skillport Administrator)	Icon in the Learning Plan (Skillport Learner)	Content Type
		**Courses** A course is web-based instructional content delivered to you on your computer. During a course, you practice and are assessed on your mastery of the skills and knowledge learned in the course. The following types of courses are examples of what may be available in your Library: ▪ Business Skills ▪ Certifications ▪ Compliance **Note**: Compliance courses assigned from the Advanced Compliance feature set display in the learning plan with a badge symbol  on the course icon. This is applicable only if Advanced Compliance is enabled for your site. ▪ Desktop Skills ▪ IT Skills ▪ Instructor-Led Training (ILT)

		Simulations A SkillSim (Skillsoft simulation) is a technology-enabled simulation that puts you in an authentic business or professional situation. You play a major role in a variety of simulated interactions where your decisions have a direct impact on the course of events and result in realistic consequences. The SkillSim is designed to help you practice or assess your mastery of skills and knowledge learned in a series of Skillsoft courses. As you progress through a series of scenes, you will receive feedback on your performance. To assist you, the simulation incorporates links to context-sensitive Skillsoft course material.
		Live Learning Courses (LLC) Live Learning courses are a derivative of traditional, instructor-led technical training. Instead of gathering students in a physical location, lectures are delivered to participants with streaming audio, video presentations, and application sharing over the Internet. Lectures are also available as recordings for on-demand viewing. Live Learning courses are hosted and delivered as a collection of launchables; once you enroll in a Live Learning course, all of its assets become available to you on the course summary page.
		Live Learning: **Expert Live Sessions:** Live Learning Expert Live sessions are live, webcast instructional sessions taught at specific, scheduled dates and times by a team of expert instructors.
		Live Learning: **Expert Encore Sessions:** Recorded sessions for on-demand viewing or reviewing of Expert Live sessions.
		Books: **Analyst Perspectives** Summaries of the views of many different analyst firms. Analyst Perspectives provide insight into their research and opinions on IT and telecommunications in a context that helps planners and decision makers at all levels make better informed decisions. With hundreds of research firms tracking the technology industry, Analyst Perspectives help you to select and apply the right reports to your business needs.
		Books: **Blueprints** Authored by C-level business executives, Blueprints provide nuts and bolts information to help formulate planning and action of strategies.
		Books: **Summaries** Summaries are summaries of leading business books from today's foremost business authors. Summaries expertly encapsulate the salient points and ideas of full-length books into digestible, 8-page summaries. Unlike excerpts or reviews, Summaries skillfully distill the essence of the author's work, conveying content, style and spirit. Designed for ease-of-use with short passages, bulleted lists, and

		other useful elements, these thorough, yet concise high-level overviews represent cutting-edge ideas that are shaping today's business environment
		Books: **Journals** Journals are issues of a given publication released on a periodic basis.
		Books: **Newsletters** Newletters are short-form text documents containing news and other topical information.
		Books: **Recorded Sessions** Recorded Sessions are recorded audio conversations with leading business book authors. (transcripts are included)
		Books: **Reports** Reports are short-form text documents covering a specific business or technical topic.
		Books: **Audio books** Certain collections of books have audio editions available for download in MP3 format.
		Business Exploration Series: **Courses** Business Exploration Series courses (Business Impact Series and Challenges) provide learners with engaging, visually rich, scenario-based learning that enables them to experience real world situations in safe, exploratory environments. These learning assets use video and Flash to make the learning experience engaging and authentic.
		Business Exploration Series: **Business Impact Series** Media-rich dramatizations of frequently encountered business problems. Use these to pick up on best practices and things to avoid in various business scenarios.
		Business Exploration Series: **Challenges** Media-rich case studies focused on content analysis, problem solving, and decision making. Each challenge presents learners with a specific objective or goal, along with related discovery material and multiple potential solutions. Learners are challenged to analyze a business problem and discovery material, select one of several potential solutions, and then defend or justify their selections by answering questions about the selected outcome.

		Express Guides™ Express guides are electronically-delivered equivalents of the student guides that IT professionals receive when they attend instructor-led training classes. They consist primarily of text and graphics and do not contain interactive practice questions or assessments.
		Job Aids Job aids are standalone documents that support the transfer of knowledge and skills from courses to the workplace. They are performance-support tools designed to be used on an ongoing basis, or around a specific work-focused events, such as performance reviews, interviewing, or strategic planning. Job aids are not dependent on course content. If a job aid is available for a particular course, you can launch it from the course summary page.
		Learning Sparks Learning Sparks are interactive assets designed primarily for information technology subjects such as Cisco and IT Security.
		Practice Labs Practice labs are designed to help you practice and assess your current skill levels and maintain ongoing expertise. An expert introduction provides you with insights and key pointers to the core skills practiced in the lab. After the introduction, you work in a learning environment that replicates a real-world job situation, and you complete hands-on exercises designed to build a rounded aggregation of competencies and skills.
		Projects Projects give IT professionals the opportunity to test their skills in structured learning environments that reflect real-world situations. They consist of extensive programs of unified, integrated projects that challenge developers to solve practical business problems, and they foster the acquisition of core programming skills. Use a hosted IDE or Microsoft Visual Studio to build a robust business application by completing a series of coding projects. Skillsoft's innovative code judging application can evaluate your solutions, provide targeted feedback, and pinpoint helpful reference materials.
		SkillBriefs SkillBriefs are single-page, condensed summaries of the instructional content of a course topic. Use SkillBriefs as an instant reference after you have completed a course. If a SkillBrief is available for a particular course, you can launch it from the course summary page.

		Mentoring Mentoring provides a convenient way of accessing the Ask My Mentor feature for a particular course or certification path. Mentoring assets map to specific certification exams, and, therefore, they appear in the Library beneath applicable exams in a certification-related curricula folder. You can access mentoring support by clicking ? in one of the following locations: ▪ A course summary page that has a related mentoring offering. Browse the certification-related categories in the Library, or use search. ▪ The objectives screen of a mentored exercise. The Ask My Mentor page allows you to take advantage of three types of mentoring: live chats, questions and answers by email, and daily messages. ▪ **Chat with a Mentor:** If you have a quick question about a course or certification, your mentoring team can provide you with a quick answer. To enter a live chat with a mentor, click **Chat with a Mentor**. ▪ **Email My Mentor:** If you have a detailed question about a course or certification, your Mentoring Team can provide you with a detailed answer via email. To email a mentor, click **Email My Mentor**. ▪ **Change Daily Email Options:** You can receive daily email messages that contain questions and information relevant to the specific certification. To activate this feature and specify the frequency with which to receive messages, click **Change Daily Email Options**.
		Videos Videos covers a variety of business- and leadership-related themes. Videos include: ▪ Leadership QuickTalks ▪ CEO QuickTalks ▪ On-Demand versions of Live Events ▪ Live Video Events
		Live Events Live Events are scheduled live and interactive forums during which recognized thought leaders offer cutting edge thinking on a leadership topic. Live Events are recorded for viewing at a later date.

		Skillsoft Advantage Skillsoft Advantage (SA) is a series of targeted development programs comprised of a collection of learning assets that have been thoughtfully selected and organized by industry experts. Individual learning tracks offer a combination of new and existing assets that combine multiple modes of instruction, including text, video, and interactive practice activities that are intended to keep the learning quick and engaging. Each track is designed to take no more than two hours to complete, although you can complete as much or as little of any track at one time.
		KnowledgeCenters A KnowledgeCenter™ is a pre-packaged, user-friendly learning portal that allows learners instant access to trusted, targeted content. Each KnowledgeCenter includes material selected by subject matter experts to help learners build knowledge around a topic quickly and efficiently. KnowledgeCenter materials can include featured topics refreshed on a monthly basis, online books and reference materials, Skillsoft courses, Live Learning courses and their related assets, SkillSims, practice labs, projects, and more.
		TestPrep Exam TestPrep Exams are practice tests that help you prepare for a certification exam by testing your knowledge in a simulated certification testing environment. You can take a TestPrep exam in Study Mode (where you receive feedback after each question) or in Certification Mode (designed to mimic a certification exam).
		Final Exam These are final tests associated with a series of courses or learning path. Questions are drawn from all courses in the series to create an inclusive exam to test your knowledge of the subject matter. You demonstrate your competency with the associated courseware by successfully completing the final exam. In some cases, you must complete a final exam in order to earn college credits or to meet the requirements for professional-level certifications.

		Evaluations Some learning assets, such as courses and learning programs, can have associated evaluation forms that allow you to provide feedback about your experience. In some cases, courses that you take as part of a credential require that you complete an evaluation in order to receive credit for the course. If you complete an asset that has an associated evaluation, an evaluation is automatically added to the **Assigned Learning** tab of your learning plan. (Evaluations for learning programs and Live Learning courses are only added after the entire program or course is completed.) After you complete the evaluation, it is then automatically removed from your learning plan. If the evaluation is optional, you do not have to complete it, and you can remove it from your learning plan at any time. If the evaluation is required, you can only remove it from your learning plan by completing it. Each time you sign in to Skillport, you are reminded to complete the required evaluation.

What is a Custom Asset?

Custom assets are those created specifically for your organization, such as external learning objects (ELOs), Instructor-led training (ILT) courses and sessions, Dialogue Live sessions, and custom courses uploaded using Skillsoft Publisher.

Actions you can take with custom assets include:

- Copy custom assets from one customized library to another
- Hide or unhide custom assets within a library
- Entitle custom assets to learners, so they can search and browse for them
- Assign or deassign custom assets to learning plans, so learners have direct access in the Assigned Learning tab of their learning plans

Default icons for custom assets vary; you can upload your own image, or use the default icons:

Icon in the Catalog (Skillport Administrator)	Icon in the Learning Plan (Skillport Learner)	Content Type
		Custom Course A custom course is organization-specific web-based instructional content delivered to you on your computer. During a custom course, you practice and are assessed on your mastery of the skills and knowledge learned in the course.

		**Instructor Led Training (ILT) Courses** Instructor Led Training (ILT) courses are scheduled courses that you attend at a specific time. An ILT course can have one or more sessions, which are scheduled instances of the course. There are 2 types of ILT sessions: ▪ **ILT physical sessions**: These sessions are held at physical locations, for example, a classroom or conference room. ▪ **ILT virtual sessions**: These sessions are delivered online via web conferencing applications. You can enroll yourself in an ILT session, or your manager or training administrator can enroll you. Depending on the configuration of your site, your manager may need to approve the enrollment if you enroll yourself. If your manager enrolls you, you are notified by email of the location, duration, time, and date of the scheduled session. If sessions of a course are currently unavailable (that is, there are no scheduled sessions or all scheduled sessions are full), you can add an ILT course to your watchlist in order to be notified when a new session is scheduled.
		**Learning Programs** A Learning Program is a collection of learning assets that are grouped together based on subject matter, target audience, learning goal, or another organizing principle. Learning programs can include required and elective assets, have a defined structure that requires completion in a prescribed order, and a learner's progress can be tracked.
		**External Learning Objects (ELOs)** An external learning object (ELO) is a reference to a learning activity or resource such as: ▪ A membership in a professional association ▪ A subscription to, or an article in, a journal or magazine ▪ An on-the-job or off-the-job experience ▪ A web site (for example, http://www.mywebsite.com/usefulinfo.html) ▪ An Internet newsgroup ▪ An in-house policy and procedure manual (for example, http://www.mywebsite.com/manuals/newemployeemanual.pdf) External learning objects can be displayed, and searched for, in the Library. However, Skillport cannot track their completion by learners.

Custom Image Specifications

Custom images must follow these guidelines:

- **Size:** Up to 5 MB
- **Format:** .jpg, .gif, .png
- **Dimensions:** 125 pixels x 138 pixels

Note: Skillport automatically resizes custom images depending on where they display (such as in the learning plan or in search results.)

Copy an Asset

You can include an asset in multiple libraries by copying it into different folders. Valid folder destinations are:

- A custom folder or linked folder.
- A custom series or linked series, if the selections in the Browse Catalog pane are resources and courses only (no books).

Note: You cannot copy an asset into a root folder that is a browse view, nor into a stock folder (as these are locked and not disabled for editing).

To copy an asset

1. Click **Content > Library** on the navigation bar.

   The Library page displays.
2. In the Browse Catalog pane, browse to or search for the folder into which you want to copy one or more assets.
3. Move the mouse over the folder title, and click the **Edit Contents** link.

   The selected folder displays in the Edit Contents pane.
4. In the Browse Catalog pane, browse to or search for the asset(s) that you want to copy, and then select them. To select multiple assets, use **Shift-click** or **Ctrl-click**.
5. Drag and drop the selected assets in the Browse Catalog pane to the desired folder in the Edit Contents pane. If you hover your mouse over a collapsed subfolder, it automatically expands to allow you to drop the assets inside.
6. Alternatively, you can select assets in the Browse Catalog pane, select a destination folder in the Edit Contents pane, and click the arrow icon displayed on Library page for copying assets into different folders.
7. Click **Exit**.

   Note: The Library is not updated with your changes until you exit the Library page.

Hide or Unhide Assets

You can hide assets to remove them from the view of other administrators and learners without having to reorganize the Catalog. You can hide all types of assets, except for Instructor Led Training (ILT) courses, books, videos, Live Events, SkillBriefs, job aids, and portals (such as KnowledgeCenters). You must be a company administrator to hide or unhide assets.

Note: The Library contains all stock and custom content installed on your Skillport site. You can organize this content into one or more libraries to optimize learner browsing and searching, and to facilitate the entitling and assigning of content.

When you hide an asset:

- It is marked as hidden (grayed out) in the Catalog. If there are multiple instances in the Catalog, all of the instances are marked as hidden.
- It is hidden from all learners in the Library, Community, and Search.
- It cannot be launched (for example, via a link in an email).
- It continues to display in a learner's Learning Plan and Learning Transcript, if he has already made progress on the asset.
- It continues to be viewable in reports. Hidden assets can still be selected as filter criteria in the Reports user interface.

If you hide all the assets in a particular folder, and then later add an asset to that folder, the new asset does not inherit the hidden state of the other assets in the folder.

To hide one or more assets

1. Click **Content > Library** on the navigation bar.

   The Library page displays.
2. In the Edit Contents pane, navigate to the folder containing the asset(s) you want to hide.
3. To hide a single asset:
   a. Expand the folder to display the assets in the folder.
   b. Move your mouse over the desired asset, then click the **Hide** link.
4. To hide all the assets in a folder:

   Note: When you specify a folder of assets to hide, only the assets contained in the folder are hidden; the folder and any subfolders remain visible.

   a. Move your mouse over the desired folder, then click the **Hide/Unhide** link.
   b. In the confirmation dialog box, click **Hide All Assets**.
5. Click **Exit**.

   Note: The Library is not updated with your changes until you exit the Library page.

To unhide one or more assets

1. Click **Content > Library** on the navigation bar.

The Library page displays.

2. In the Edit Contents pane, navigate to the folder containing the asset(s) you want to unhide.
3. To unhide a single asset:
   a. Expand the folder to display the assets in the folder.
   b. Move your mouse over the desired asset, then click the **Unhide** link.
4. To unhide all the assets in a folder:
   a. Move your mouse over the desired folder, then click the **Hide/Unhide** link.
   b. In the confirmation dialog box, click **Unhide All Assets**.
5. Click **Exit**.

Note: The Library is not updated with your changes until you exit the Library page.

Edit a Custom Asset's Image

External learning objects (ELOs) created within Skillport, as well as custom assets created outside of Skillport and then uploaded to your site, can use either a standard image provided by Skillsoft (the default) or a custom one that you upload.

To edit a custom asset's image

1. Click **Content > Library** on the navigation bar.

   The Library page displays.
2. In the Edit Contents pane, expand the Publisher Custom Content folder (with the lock icon) and locate the desired custom asset.
3. Hover the cursor over the custom asset, and click the **Edit** link.

   The Edit Asset dialog box displays.
4. Select **Use custom image**.
5. Click **Add**.
6. Click **Browse** to navigate to the desired image file.

   Custom images must follow these guidelines:
   - **Size:** Up to 5 MB
   - **Format:** .jpg, .gif, .png
   - **Dimensions:** 125 pixels x 138 pixels

   Note: Skillport automatically resizes custom images depending on where they display (such as in the learning plan or in search results.)
7. Click **Upload**.
8. Click **Save**.

Content Types

Skillsoft supports a wide variety of content types which can be divided into two basic categories: Active and Passive content.

About Active Content

Active Content (or trackable content) uses standardized commands to communicate student progress results to a standards-conformant learning management system (LMS) such as Skillport. Trackable content consists of the course content files and a file set (either third-party or Skillport-proprietary) designed to enable the LMS to understand the structure and communication protocol of the course.

Skillport supports three basic types of active or trackable content:

- Assets in the Skillsoft standard library that include an end user assessment or test are considered active.
  - Courses
  - Simulations (SkillSims): Note that learners must select the option to take the Simulation in **Score mode** upon launch or the asset will NOT track as complete.
  - TestPrep Exams
- AICC third-party content hosted in Skillsoft environment
- SCORM third-party content hosted in Skillsoft environment

Active Content Types

Below is a list of currently supported active content types.

- Skillsoft Stock Library courses
- Course Topics
- Custom Courses
  - SkillStudio courses (both generated from or modified in SkillStudio)
  - Dialogue Design courses (provided they contain assessments)
  - Courses generated in third-party tools

    Note: Follow the authoring guidelines for AICC/SCORM content authoring to ensure that your content will be trackable and completable.
- Final Exams*
- Instructor Led Training (ILT) Course
- Learning Events

  Note: By default, Learning Events are passive but can be configured to be completable.
- Resources
  - Projects
  - Practice Labs

- Series

Note: Content in a series may be completable (active), but the series itself is not completable.

- Simulations
- TestPrep Exams*

* To complete this type of asset, you must obtain the minimum score.

About Passive Content
Passive Content (or non-trackable content) is typically used to supplement or enhance the learning experience as additional reference or resource material.

- Passive content does not communicate with Skillport or third-party LMS systems in any way.
- Skillport does record the date and number of times passive content is accessed and by whom.
- Skillport does not track the duration, score, or completion status for this content. The status of any passive object will be indicated as **In Progress** after that content item has been launched.
- Typical file formats that are considered passive include .pdf, .doc, .xls, .zip, .txt, and .htm. Examples of passive content include white papers, articles, Microsoft Office files, and media files.
- Any External Learning Object (ELO) published in Skillport is considered passive.
- All content (regardless of file format) hosted outside the Skillport hosting environment is considered passive.

Passive Content Types
While passive content can be launched and tracked, and reported on (first access and last access dates), it cannot be completed.

Below is a list of currently supported passive content types.

- Books: All books and book sections, including:
  - Newsletters
  - Recorded Sessions
  - Reports
  - Summaries
- External Learning Objects (ELOs)
- Learning Events

Note: Learning Events by default are passive but can be configured to be completable.

- Learning Portals
  - Business Exploration Series

  - Knowledge Centers
  - Skillsoft Advantage Products
- Resources
  - Business Impacts
  - Business Challenges
  - Job Aids
  - Learning Sparks
  - Live Learning Mentoring
  - SkillBriefs
  - Videocasts
  - Mentoring
- Videos

Learning Programs

A learning program consists of folders and learning content with specified orders and completion criteria.

The root folder defines the basic attributes of the learning program and can have both learning assets and child folders. Each child folder can have its own completion criteria. These child folders can contain learning assets and child folders of their own.

Important Information about Learning Programs

Learner Enrollment

You can enroll a learner into a learning program in one of two ways:

1. Enroll the learner individually.
2. Enroll the group in which the learner is a member.

These enrollments are treated independently. If you enroll a group, and later withdraw a member of that group from the learning program, the rest of the group is unaffected. Also, if you enroll an individual learner, then enroll a group to which that learner is a member, the learner is not double-assigned.

Group Enrollment

Note the following:

- If you remove a learner from an enrolled group, he is automatically withdrawn from the learning program unless he has already completed it. No further steps need to be taken.
- If you remove a learner from an enrolled group, his completion data for the learning program (In Progress or Completed) remains in the system, even if he has not made any progress within the learning program.
- If you add additional members to an enrolled group, those learners are automatically enrolled in the learning program.

  Exception: If you add a new subgroup directly under the ALL USERS group (visible only to Company Admins), those members are not automatically enrolled. You must enroll them individually, or add them to a different group.

Completion Status

Enrolling in a learning program is considered the first step of starting the program or course; as a result, the learning content is automatically displayed in the learner's learning transcript immediately upon enrollment. For more information about completion status, see Learning Program Completion Criteria.

Learning Programs within a KnowledgeCenter

If a learning program is used in a KnowledgeCenter roadmap, learners must be assigned and enrolled in the learning program before they can see it in the KnowledgeCenter. If they are not assigned, they will see an error message. If they are assigned but not enrolled, the learning program appears empty in the KnowledgeCenter roadmap details page.

Content Types

You can add the following content types to learning programs:

- Books
- Courses
- Express Guides
- Instructor-led Training Courses
- Folders
- Job Aids
- Learning Sparks
- Mentoring
- Practice Labs
- Projects
- Simulations
- SkillBriefs
- TestPrep Exams
- Videocasts
- Videos

Learning Program Completion Criteria

Learning programs are presented in a hierarchical (tree view) form, and completion of a learning program is determined by the completion criteria specified for it. A folder's rules are imposed on its immediate children unless a child is a folder with its own rules, in which case the child folder's rules apply.

The completion criteria for a folder can be one of the following:

- **Complete All:** Complete all courses in the folder in any order.
- **Complete In Order:** Complete all courses in the folder in a specific, forced order. A learner must complete the first course before the link for the second course becomes active, and so on.
- **Complete Any {N}:** Complete a specified number of the courses in the folder, for example, "Complete Any 3." You must specify the number of courses that must be completed.
- **Optional:** No courses in the folder need to be completed.

Note: If all the assets in a learning program are optional, a learner's status in the learning program is automatically changed to **Completed** when he enrolls. This is because there are no requirements for completion. Furthermore, if you subsequently change the learning program's completion criteria, the learner's status of **Completed** remains unaffected.

As a learner completes a learning program, he receives a **% Completed** score. This value is determined by dividing the number of completed courses by the total number of courses in the learning program. Learning assets for which progress cannot be tracked (for example, a document or a hyperlink) are not included in this calculation.

Create a Learning Program

You can create a new learning program from scratch. However, if an existing learning program closely resembles the desired program, you can copy the existing learning program instead and then modify its contents as needed. For more information, see ***Copy a Learning Program*** on page 261.

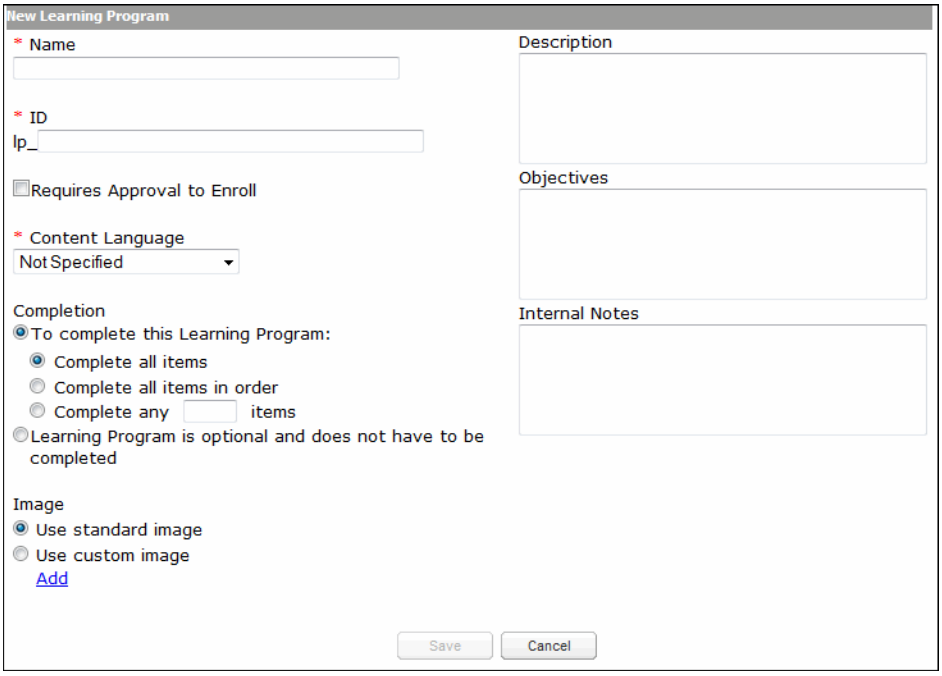
To create a learning program

1. Click **Content > Learning Programs** on the navigation bar.

   The Manage Learning Programs page displays, which lists the learning programs created on your site.

2. Click **New Learning Program**.

The New Learning Program dialog box displays:



3. Enter the information. An asterisk (*) indicates a required field.

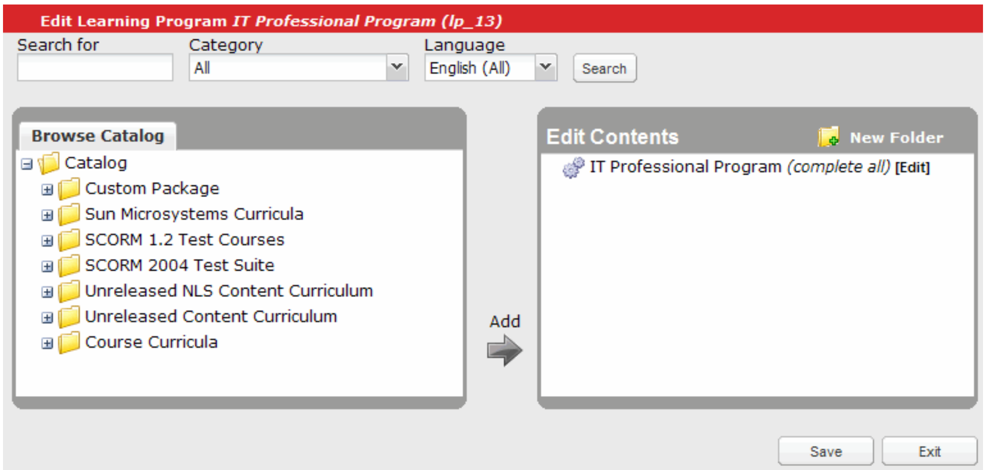
Property	Description
Name*	The name of the learning program.
ID*	Uniquely identifies the learning program in the system. This value can be a maximum of 250 alphanumeric characters, and cannot begin with an underscore. If you do not enter an ID, one is automatically generated.
Requires Approval to Enroll	Select this option if learners must request approval from their designated approval managers to enroll in the learning program. If you select this option, learners who are not enrolled cannot access the learning assets in the learning program.
Content Language*	This setting determines where the learning program displays when a user searches or browses within a selected language. Select **Not Specified** to ensure it displays in all searches regardless of a learner's selected content language, or select a language to include it only when a learner searches within that language.
Completion	The completion criteria for the root folder in the learning program: ▪ **Complete all items**: Learners must complete all of the items in the folder, but they can do so in any order. ▪ **Complete all items in order**: Learners must complete all of the items in the folder in a specific, forced order. In other words, a learner must complete the first item before the link for the second item becomes active, and so on. ▪ **Complete any <N> items**: Learners must complete a specified number (N) of items in the folder, but they can do

	so in any order. You must specify the number of items that must be completed. ▪ **Learning Program is optional and does not have to be completed**: Learners do not have to complete any of the items in the root folder, nor do they have to complete any of the items in any child folders. If you select this option, a learner is considered to have completed the learning program as soon as he or she has enrolled.
Image	Specify the image to display for the learning program: ▪ **Use standard image:** This is the default setting. ▪ **Use custom image:** Click **Add**, click **Browse** to browse for the desired file, then click **Upload** to upload the image. The image must be either a .png, .gif, or .jpg file, and can have a maximum size of 5MB.
Description	A description of the contents of the learning program. This value must be 4,000 characters or less.
Objectives	The objectives (goals) of the learning program. This value must be 4,000 characters or less.
Internal Notes	Any information you want to note for administrators about the learning program. These notes do not display on the learning program summary page that learners can view. This value must be 4,000 characters or less.

1. Click **Save**.
2. Click **OK**.

Note: The learning program is added to the Manage Learning Programs page, and added as the last asset in the Learning Programs folder in the Catalog. Therefore, if you have assigned the Learning Programs folder to any groups or individual users, the learning program is now accessible to them by browsing the Library and by using Search (once the next run of Search indexing has occurred for your site).

The Edit Learning Program page displays, showing the Catalog in the left pane and the learning program root folder in the right pane.



3. Add learning assets to the root folder, and add child folders (to contain related learning assets) to the root folder, as appropriate.

   For help with this step, see ***Edit a Learning Program*** on page 263.

   Note: Assigning a Learning Program with an empty folder can cause incorrect values in report data for the **Status** and **Percent Started** fields.

4. Click **Save**, then click **Exit**.

5. If desired, relocate the learning program or copy it into additional catalog folders.

   To get started with this, select **Admin Home** in the upper-right corner, then click **Organize the catalog** on the **Admin Home** tab. For more information, see ***Library*** on page 214.

6. If desired, assign the learning program to one or more groups or individual users.

   To get started with this, select the learning program, and click **Manage Enrollments**. For more information, see ***Enroll Users or Groups*** on page 176.

Copy a Learning Program

If an existing learning program closely resembles the desired program, you can copy the existing program and modify its contents as needed.

To copy a learning program

1. Click **Content > Learning Programs** on the navigation bar.

   The Manage Learning Programs page displays, which lists the learning programs created on your site.

2. Select the learning program that you want to copy, and click **Copy** at the top of the page.

3. In the Copy Learning Program dialog box, modify the learning program properties as desired. For more information about the properties, see ***Create a Learning Program*** on page 258.

4. Click **Save**, then click **OK**.

   The Edit Learning Program page displays. The new learning program (shown in the right pane) contains all the assets in the original learning program.

   Note: The learning program is added to the Manage Learning Programs page, and added as the last asset in the Learning Programs folder in the Catalog. Therefore, if you have assigned the Learning Programs folder to any groups or individual users, the learning program is now accessible to them by browsing the Library and by using Search (once the next run of Search indexing has occurred for your site).

5. If desired, edit the learning assets and folders in the learning program. For help with this step, see ***Edit a Learning Program*** on page 263.

6. Click **Save**, then click **Exit**.

7. If desired, relocate the learning program or copy it into additional catalog folders. To get started with this, select **Admin Home** in the upper-right corner, then click **Organize the catalog** on the **Admin Home** tab. For more information, see ***Library*** on page 214.

8. If desired, assign the learning program to one or more groups or individual users. To get started with this, select the learning program, and click **Manage Enrollments**. For more information, see ***Enroll Users or Groups*** on page 176.

Edit a Learning Program

You can modify a learning program in several ways. Prior to editing a learning program, you must open it for editing (that is, display the Edit Learning Program page).

To open a learning program for editing

1. Click **Content > Learning Programs** on the navigation bar.

   The Manage Learning Programs page displays, which lists the learning programs created on your site.

2. Select the learning program that you want to edit, and click **Edit**.

   The Edit Learning Program page displays, with the contents of the learning program displayed in the right pane. Note that both the left pane and the right pane are resizable.

Add or Remove Assets from Folders

To add a learning asset to a learning program

1. Open the learning program for editing.

2. In the Browse Catalog pane, locate the asset that you want to add to the learning program. You can do this in one of two ways:

   - Browse the Catalog by navigating through its structure.

   - Search for the asset using the search fields at the top of the page. For detailed information on the search tool, including tips on creating search expressions, see ***Search for Assets and Folders*** on page 14.

3. To add the asset:

   a. Select the title of the asset in the Browse Catalog pane, and drag it to the Edit Contents pane on top of the desired folder or asset.

   b. When the cursor changes from a red circle with a line through it, to a green circle with a plus sign, drop the asset in the desired location.

   Alternatively, you can select the title of the asset, select the destination folder in the Edit Contents pane, and click between the two panes. If you want to select the root folder of the learning program, select the title of the learning program as the destination.

   Note: You can use Shift-click and Ctrl-click to select multiple assets.

4. Click **Save**, then click **OK**.

To remove a learning asset from a learning program

1. Open the learning program for editing.

2. In the Edit Contents pane, move your mouse over the title of the asset, and click the **Remove** link.

3. Click **OK**.

Add or Remove Child Folders

You can add and remove child folders from a learning program as needed. Note that removing a child folder also removes all of the assets in the folder from the learning program.

To add a child folder to a learning program

1. Open the learning program for editing.
2. In the Edit Contents pane, select the folder in which to create the child folder:
   - To add the folder as a top-level folder in the root folder, select the title of the learning program.
   - To add the folder as a child folder within another folder, select the parent folder.
3. Click **New Folder**.

   The New Folder dialog box displays.
4. In **Name**, type a name for the folder.
5. In **Completion**, select the completion criteria for the items that the folder will contain.
6. Click **OK**.

To remove a child folder in a learning program

1. Open the learning program for editing.
2. In the Edit Contents pane, move your mouse over the title of the folder, and click the **Delete** link.
3. Click **OK**.

Reorder Assets and Folders in a Learning Plan

You can reorder the assets or folders in any folder in a custom learning program. This changes the order in which they are displayed to learners. Be aware that if the parent folder's completion criteria is Complete All In Order, reordering the items in a folder also affects the order in which learners must complete the items. For more information, see ***Learning Programs*** on page 258.

To reorder the assets or folders in a learning program

1. Open the learning program for editing.
2. In the Edit Contents pane on the right, select the asset or folder that you want to move, drag it to the desired location, and drop it.

Edit the Properties of a Folder

You can edit the name and completion criteria for any folder in a learning program.

The root folder of a learning program has several additional properties that apply to the learning program as a whole, such as the objectives of the learning program and whether the learning program requires approval in order for learners to enroll. You can edit these properties as well.

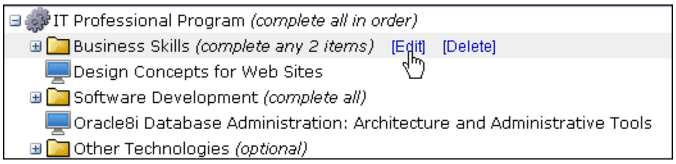
To edit the properties of the root folder or a child folder

1. Open the learning program for editing.

2. In the Edit Contents pane on the right, do one of the following:

   - If you want to edit the properties of the root folder, move your mouse over the title of the learning program, and click the **Edit** link that displays.

   - If you want to edit the properties of a child folder, move your mouse over the title of the folder, and click the **Edit** link that displays.



3. In the Edit Learning Program box (if you are editing the root folder) or Edit Folder dialog box (if you are editing a child folder), edit the properties of the folder as needed. For more information on these properties, see ***Create a Learning Program*** on page 258.

Note: The **Content Language** setting determines if the folder displays when a user searches or browses within a selected language. Select **Not Specified** to ensure it displays in all searches regardless of a learner's selected content language, or select a language to include it only when a learner searches within that language.

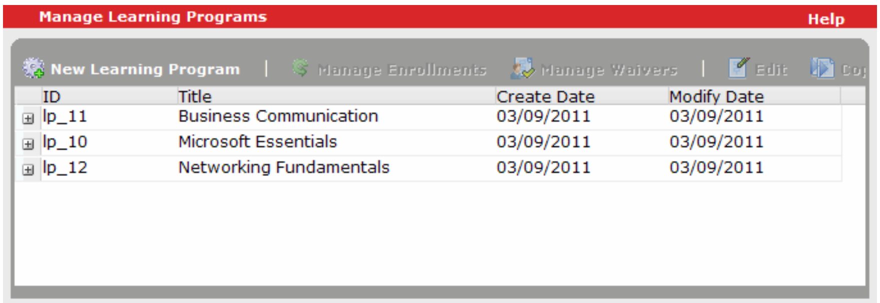
4. Click **OK**, and then click **Save** to save your changes.

View Existing Learning Programs

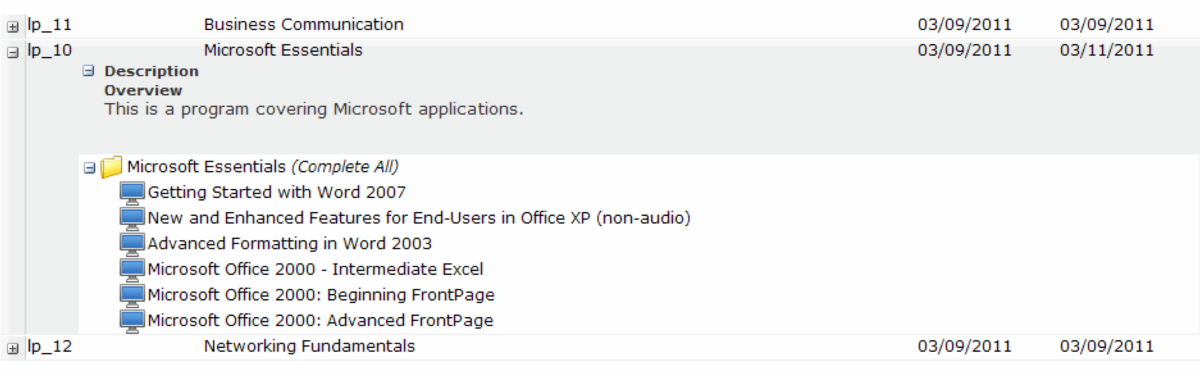
To view existing learning programs

1. Click **Content > Learning Programs** on the navigation bar.

   The Manage Learning Programs page displays, which lists all the learning programs created on your site. By default, the learning programs are sorted by title.



2. To view the details of a learning program, click the plus sign (⊞) to expand it.



Delete a Learning Program

If you delete a learning program that one or more users have already completed, the completion data for the learning program as a whole is also deleted for those users.

However, the completion data against the individual assets of the learning program is retained and remains in each user's Learner Transcript, and is represented in any reports that you run.

Note: If you no longer want to use a learning program, but want to keep the existing results, do not delete the learning program. Instead, create a new folder (for example, Retired LPs) in the Catalog, and move the learning program into that folder. To ensure its contents are hidden from users, do not give anyone any entitlement to the folder.

To delete a learning program

1. Click **Content > Learning Programs** on the navigation bar.

   The Manage Learning Programs page displays, which lists the learning programs created on your site.

2. Select the learning program that you want to delete, and click **Delete**.
3. Click **OK** to confirm the deletion.
4. Click **Yes** to delete the learning program.
5. Click **OK** to acknowledge the deletion.

External Learning Objects (ELOs)

An external learning object (ELO) is a reference to a learning activity or resource such as:

- A membership in a professional association
- A subscription to, or an article in, a journal or magazine
- An on-the-job or off-the-job experience
- A web site (for example, http://www.mywebsite.com/usefulinfo.html)
- An Internet newsgroup
- An in-house policy and procedure manual (for example, http://www.mywebsite.com/manuals/newemployeemanual.pdf)

External learning objects can be displayed, and searched for, in the Library. However, Skillport cannot track their completion by learners.

Create an ELO

You can add an external learning object (ELO) to any folder that can be modified except for the top-level Catalog folder.

To create an ELO

1. Click **Content > Library** on the navigation bar.

   The Library page displays.
2. In the Browse Catalog pane, browse to or search for the folder in which to create the ELO.
3. Move your mouse over the folder title, and click the **Edit Contents** link.
4. In the Edit Contents pane, select the folder, and click **New ELO**.
5. In the **Create New External Learning Object (ELO)** dialog box, enter the information for the new ELO. Required fields are indicated with an asterisk (*):
   - **Title:** Enter up to 54 characters. All Latin1 and double-byte characters are accepted.
   - **Valid URL**: The URL to access the ELO.
   - **URL Restrictions:** The URL must be static (no passing of parameters or variables is permitted), and it must begin with http:// or https://. Also, if the resource to which the URL points is hosted by Skillsoft, the URL must point to either a PDF file or an HTML page that does not include scripting. Microsoft Office documents, including those converted to HTML, are not permitted. If you want to point to a resource whose file type is not permitted, you must host it on an external server (that is, specify an external URL).
   - **ID:** The unique identifier for the ELO within Skillport. The identifier is automatically assigned a prefix of "elo_".
   - **Content Language:** This setting determines where the ELO displays when a user searches or browses within a selected language. Select **Not Specified** to ensure it displays in all searches regardless of a learner's selected content language, or select a language to include it only when a learner searches within that language.

For example:
An admin, Joe, creates an ELO for an upcoming seminar for leadership and sets the content language to Spanish. A learner, Kim, searches for leadership, but her content language in Skillport Learner is set to English (United States). Kim won't see the ELO because it isn't marked as English (United States). If Joe sets the content language to **Not Specified**, Kim would be able to see the ELO regardless of her set content language.

Note: To include the external learning object in browse and search results regardless of language, select **Not Specified**.

- **Description:** Enter descriptive text about the ELO. All Latin1 and double-byte characters are accepted.
- **Objectives:** The learning objectives that the ELO satisfies.
- **Common Attributes:** Select whether the ELO is **Tablet Accessible**, **Smartphone Accessible**, or both.

Note: If the ELO's URL is supported by mobile browsers, you can select this option to enable launch of the ELO from a tablet or smartphone. If you do not select this option, the user is able to search for and save the ELO to their learning plan, but cannot launch it, from their mobile device.

- **Image:** To specify a different image to display for this ELO in Skillport Learner, click **Use custom image**. Then, click **Add**, click **Browse** to navigate to the desired file, then click **Upload**.

  The image file must be a .gif, .png, or .jpg file, and can have a maximum image size of 5 MB.

6. Click **Save**.
7. Click **Exit**.

Note: The Library is not updated with your changes until you exit the Library page. Once the ELO displays in the Library, any learners who have been assigned the ELO's parent folder (directly or indirectly) can access the ELO.

8. If necessary, assign the ELO to users and groups as needed. For more information, see ***Assign and Deassign Assets in the Library*** on page 66.

Edit an ELO

To edit an ELO

1. Click **Content > Library** on the navigation bar.

   The Library page displays.
2. In the Browse Catalog pane, browse to or search for the folder that contains the ELO you want to edit.
3. Move your mouse over the folder title, and click the **Edit Contents** link.
4. In the Edit Contents pane, move your mouse over the title of the ELO, and click the **Edit** link.
5. In the **Edit External Learning Object (ELO)** dialog box, edit the properties as desired. For descriptions of each property, see Create an ELO .

6. Click **Save**.
7. Click **Exit**.

   Note: The Library is not updated with your changes until you exit the Library page.

Remove an ELO

Note: Removing an external learning object (ELO) from one folder automatically removes all instances of that ELO from all other folders. The ELO is permanently removed from the site.

To remove an ELO

1. Click **Content > Catalog** on the navigation bar.

   The Library page displays.
2. In the Browse Catalog pane, browse to or search for the folder that contains the ELO that you want to remove.
3. Move your mouse over the folder title, and click the **Edit Contents** link.
4. In the Edit Contents pane, move your mouse over the title of the ELO, and click the **Remove** link.
5. Click **OK** to confirm the removal.
6. Click **Exit**.

   Note: The Library is not updated with your changes until you exit the Library page.

Dialogue Live

You can list Dialogue Live sessions directly in the Skillport Library to make them easier for learners to locate and attend.

About Dialogue Live Sessions

If your Skillport site is configured to support it, Dialogue Live sessions can be listed in the Skillport Catalog when they are created.

Be aware that, while adding a Dialogue Live session to your Skillport Catalog automatically adds the session to a custom folder (Live Dialogue Sessions), it will not make these sessions visible to learners. To make the sessions visible to learners, you must do the following:

1. Entitle the sessions to learners so that they can search for sessions.
2. Add the Dialogue Live session(s) to one of the three designated ***browse views*** on page 221 so that learners can browse for sessions via the **Browse the Library** link in Skillport.
3. Create a copy of the folder and designate this copy a browse view. Note that copies of custom folders do not inherit any updates to the parent folder. For more information on custom folders, see ***Create a Custom Folder*** on page 229.

Instructor Led Training (ILT)

Getting Started with ILT

Overview

Instructor Led Training (ILT) enriches and optimizes the learning experience of your students. By extending the Skillport platform with a wide range of ILT functionality, Skillsoft offers you a way to manage instructor-led training sessions.

With ILT, you can manage all the requirements for:

- In-house or third-party training sessions delivered in a classroom environment by an instructor to students (for example new employee orientation)
- Online training sessions delivered by an instructor using Skillsoft Dialogue Virtual Classroom or other online collaboration software.

ILT also provides tools for tracking facilities and classrooms, and for scheduling instructor-led training sessions. ILT does not track classroom or facility attributes such as projectors, printers, network connections, or other infrastructure such as availability.

Note: You cannot add ILT courses or sessions to a series. For information about which asset types can be added to a series, see Important Information about Series.

A series is a container of specifically-ordered assets used to group related assets together (for example, to obtain a certification). Series cannot have subsets.

ILT and Advanced Groups

You can create and use advanced groups on your Skillport site when you are also using ILT. This works as follows:

- **ILT administration**: While your ability to access **non-ILT** pages in Skillport Administrator depends entirely on your Skillport role, your ability to access **ILT** pages depends entirely on your ILT role. On the ILT pages that you can access, neither the tasks that you can perform nor the users on which you can perform them are affected by your or their existence in an advanced group. If you can perform an ILT-related task for users and groups, you can do so for all users and groups on your site, including all advanced groups.
- **Reports**
  - **ILT Event Journals**: Like for other ILT-related pages, your ability to access this page depends entirely on your ILT role, and you can view event journals for all users and groups, including all advanced groups.

- **Skillport Reporting**: Skillport's Reporting feature includes a large number of templates that you can use to run reports, including several ILT course and session reports and ILT student roster reports. If you do not have Admin privileges with Reporting capabilities in Skillport, you will not be able to run these reports. In addition, you will only be able to run reports on groups to which you are a member. Your ILT role has no effect on your privileges in this area. Rather, your Skillport role and how your site's User/Group Filter Scoping setting is configured determine the specific users and groups—including advanced groups—that you can select to include in reports. For more information, see User and Admin Privileges.

ILT Terms

Skillport

Skillport is a Learning Management System (LMS) where you can personalize your elearning environment and monitor your progress toward your own learning goals. Reminders can also be e-mailed in order to complete courses and simulations.

You can also link the areas of Skillport which you use most often to the Quick Links area. These links can be Skillsoft features and any custom pages.

Course

A course is a training activity which addresses a specific topic. A course can consist of: traditional materials presented in a PowerPoint format, a recorded live session delivered by a presenter, simulations which replicate a program or environment so you can practice completing tasks, other multimedia clips that support leaning, test and assessments that verify retention of knowledge, as well as job aids, skill briefs, or other materials to support the learning activities.

ILT Course

Instructor Led Training courses are placeholders to which an ILT Administrator attaches scheduled sessions that a learner can attend at a specific time and place. A learner can select an ILT course from the Skillport Library and add it to his watch list for sessions that meets his schedule, or it can be assigned by a training administrator.

Session

A session is an instance of a course that has been scheduled for a specific date and time and will be held in a facility/classroom or virtually, with an instructor and students.

Learning Plan

Learning Plan contains items that are part of your formal learning program. You, your training administrator, or your manager can add ILT courses to your Learning Plan.

ILT Roles

The table below shows the ILT features available for the different user roles.

	Learner	Admin	Course Admin	Session Admin	Session Approver	Mgr	Instructor
View ILT courses and sessions through Skillport catalog	X	X	X	X	X	X	X
Enroll in ILT sessions	X	X	X	X	X	X	X

Watch ILT courses	X	X	X	X	X	X	X
Assign user roles in ILT Admin interface		X					
Create a course		X	X				
Edit a course		X	X				
Delete a course		X	X				
Create a session		X	X	X			
Edit a session		X	X	X			
Delete a session		X	X	X			
Approve session registration requests		X			X	X	X - Applies only when **Instructor Can Manage Roster** is set to **Yes** for the session.
Reject session registration requests		X			X	X	X - Applies only when **Instructor Can Manage Roster** is set to **Yes** for the session.
E-mail all learners enrolled in a session		X	X	X			X
Close a session		X	X	X			
Force enroll learners into a session		X	X	X			X - Applies only when **Instructor Can Manage Roster** is set to **Yes** for the session.
Enter test scores/attendance for a session		X	X	X			X
Edit/preview an e-mail template		X					

Assign an ILT Role to a User

To assign an ILT role to a user

1. In Skillport Administrator, click **Users & Groups** > **ILT Roles** > **User Role Management**.

   The list of users and their associated roles displays.

2. Find the user you wish to assign a role to by:

   - manually searching through the list of usernames for the user

- using the Search feature at the top of the page.

Note: The grid refreshes to show the search results, and a **Clear Search** button displays on the page. **Clear Search** clears the top bar search, but not the column filters or the "Group By" function.

3. Select the role's check box. See ILT Roles for more information.
4. Click **Submit** to save your changes and assign the selected role to the user.

Generate and Export a Learner Report
To manage the users and their roles with ease, you can also generate a **Learner Report**.

Note: The **Learner Report** button on the top of the ILT User Role Management screen is enabled only if one of the records in the grid are selected.

To generate and export a Learner Report

1. In Skillport Administrator, click **Users & Groups** > **ILT Roles** > **User Role Management**.

   The list of users and their roles displays.

2. Click the username of the learner of whom you want to run the report.
3. Click **Learner Report** on the top of the screen.

   The Learner Report can be viewed in the resulting page.

   Note: This report is generated only for the selected user.

4. To export the Learner Report, click **Export Report**.
5. The following information can be obtained from the resulting .csv document that you download:
   - Session ID
   - Status
   - Course ID
   - Course Title
   - User Name
   - Last Name
   - First Name
   - Email
   - Zip
   - Pass

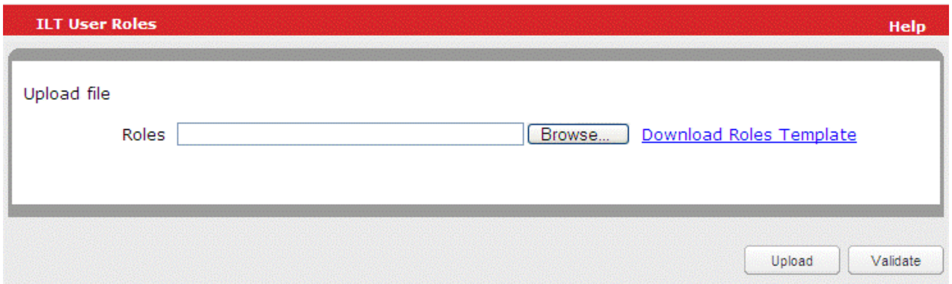
- Attd (attendance)
- Score
- Instructor User Name
- Instructor Last Name
- Instructor First Name
- Facility ID
- Facility Name
- Classroom ID
- Classroom Name
- Start
- End
- Notes

Upload User Roles
You can use the Batch Add function to upload multiple ILT user roles from another system, spreadsheet, or data from a third party (such as an external session vendor).

To upload ILT roles

1. Click **Users & Groups > ILT Roles > User Role Batch Update.**

   The ILT User Roles screen displays:



2. Next to the file type that you want to upload, click **Browse.**

   The **Choose File** window displays.
3. Navigate to the .csv file you want to upload.
4. Click the .csv file to select it.
5. Click **Open**.

   The path to your .csv file displays in the field.
6. Click **Validate** to validate the .csv file.

7. Click **Upload**.

   The upload process begins. If you have a valid email address, an email is sent containing the URL of a status report and the date and time of the batch submission.

User Roles Template
Use the **User Roles Template** to upload roles for a user quickly and easily. The table below shows the correct data format for each field in the template.

Field Name	Format
Login	**Required**. This must be a Skillport login ID.
Administrator	**Optional.** ▪ **1**: enables the role for the user ▪ **0 or leave blank:** disables the privilege.
Instructor	**Optional.** ▪ **1**: enables the role for the user ▪ **0 or leave blank:** disables the privilege.
Session Administrator	**Optional.** ▪ **1**: enables the role for the user ▪ **0 or leave blank:** disables the privilege.
Course Administrator	**Optional.** ▪ **1**: enables the role for the user ▪ **0 or leave blank:** disables the privilege.
Session Approver	**Optional.** ▪ **1**: enables the role for the user ▪ **0 or leave blank:** disables the privilege.

ILT Course and Session Manager

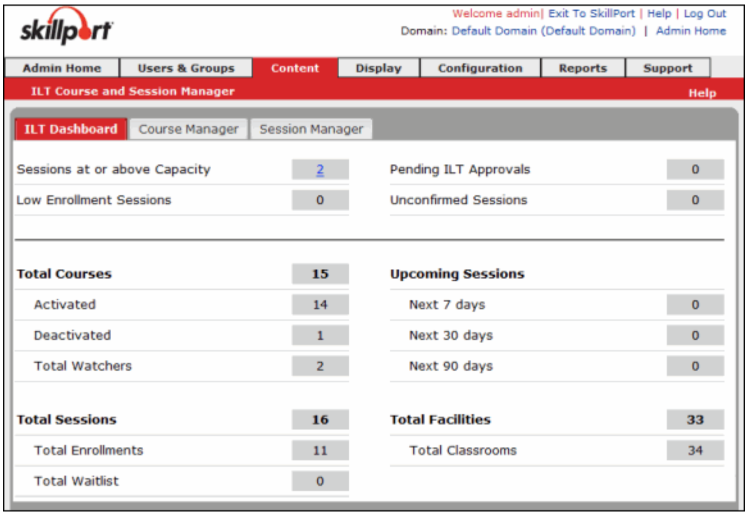
Dashboard

The dashboard provides you with a summary of details related to courses and sessions.

To view the dashboard

1. Click **Content** > **ILT** > **Course and Session Manager** on the navigation bar.

   The dashboard displays under the **ILT Dashboard** tab.



The following are the items that can be found in the dashboard.

- **Sessions At or Above Capacity**: Sessions that are full with 100% or more participants as determined by the Session Capacity and the site-wide default setting “Full Session Threshold”.

  Note: Site Settings are controlled by the Skillport Company Admin.

- **Low Enrollment Sessions**: This includes the sessions that do not meet the session low enrollment criteria. The criteria is determined by the entry in the **Minimum Enrollment** and **Low Enrollment Alert** fields.

- **Pending ILT Approvals**: This includes the list of ILT approvals that are pending.

- **Unconfirmed Sessions**: This displays all sessions that have a status of **Unconfirmed**. From the **View more in print friendly window,** the Admin can select one or more sessions and click **Confirm the selected sessions** to mark sessions as **Confirmed**.

  Note: If the Skillport Company Admin disables **Unconfirmed** in the site-wide ILT Site Settings, then no sessions will appear in this section.

- **Total Courses**: Displays the total number of ILT courses.
  - **Activated**: Displays the total number of activated ILT courses.
  - **Deactivated**: Displays the total number of deactivated ILT courses.
  - **Total Watchers**: Total number of Watch List entries made to courses by Learners.

- **Total Sessions -** Displays the total number of Unconfirmed and Confirmed ILT sessions.
    - **Total Enrollments**: Displays the total number of Pending Sessions and Confirmed enrollments.
    - **Total Waitlist**: Displays the total number of Learners on all Waiting Lists.
- **Upcoming Sessions**: Lists all future sessions including sessions for the day. Clicking the value of the link **Next 7 days**, **Next 30 days** or **Next 90 days** on the dashboard tab brings you to the Session Manager.
- **Total Facilities**: Displays the total number of ILT Facilities.
    - **Total classrooms**: Displays the total number of ILT Facilities.

Courses

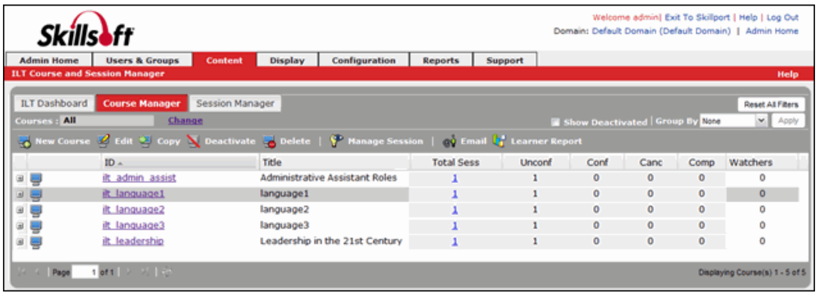
View Courses

The Course Manager displays the available course list (by course ID and course title) and the sessions.

To view courses

1. Click **Content** > **ILT** > **Course and Session Manager** on the navigation bar.
2. Click **Course Manager**.

   The ILT courses display.

3. Sort the courses:
   - Click a column header to sort in ascending or descending order.
   - Use the **Group by** field to sort by group by **Title**, **Spoken Language**, or **Cost**.
4. Optionally, you can select the **Show deactivated** check box to include deactivated courses in the Course Manager.

View ILT Course Details

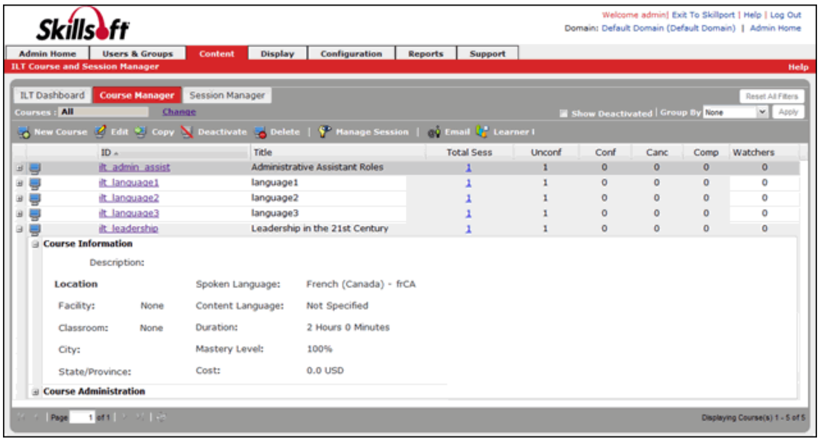
The **Course Details** page provides additional information related to a specific course, such as the course ID, title, mastery level, cost, and duration. Use this view to change and modify the details.

To view course details

1. Click **Content** > **ILT** > **Course and Session Manager** on the navigation bar.
2. Click **Course Manager**.

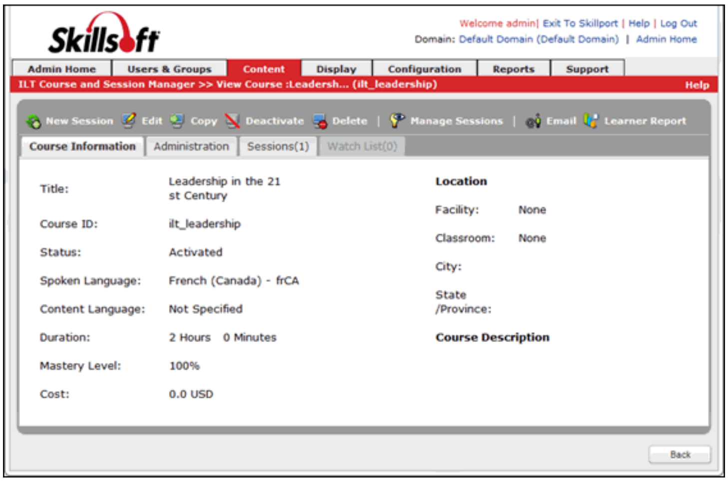
   The ILT courses display.
3. To view course details without navigating away from the Course Manager, click ⊞ next to the course you want to view.
4. Click ⊞ next to **Course Information,** or click ⊞ next to **Course Administration**.

The course details display below the course listing:



5. To open the course details on the View Course Details page (to allow edits), click the course ID you wish to view.

   The **View Course Details** page opens, and you can review your ILT course:



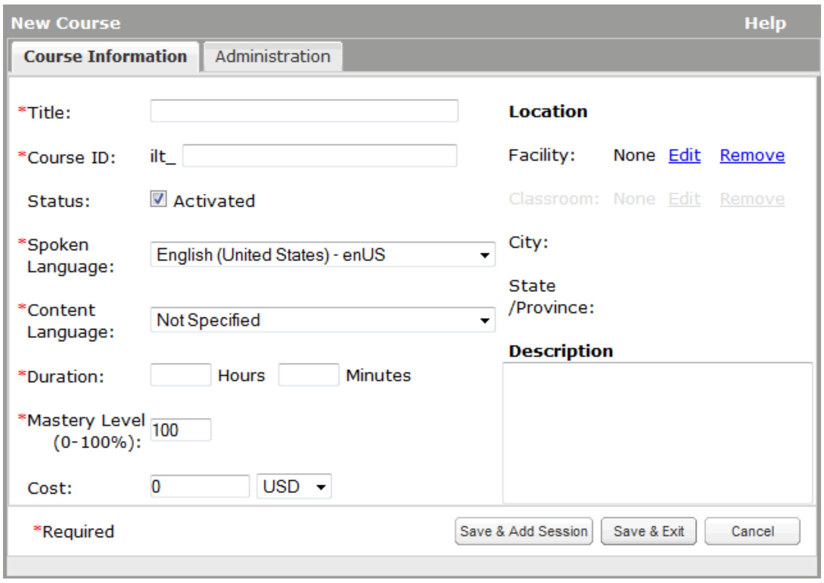
Create a New ILT Course

Use this process to create and enter details of a new ILT course.

To create a new course

1. Click **Content** > **ILT** > **Course and Session Manager** on the navigation bar.
2. Click **Course Manager**.
3. Click **New Course**.

   The **New Course** window displays:



4. Enter the **Course Information**. Items with an asterisk (*) are required:
   - **Title***: The title of the course as presented to learners. This does not need to be unique.
   - **Course ID***: All course IDs begin with **ilt_** and are always unique. Once the course ID is saved, it cannot be changed.
   - **Status**: This option activates or deactivates the course; by default the status is active. Active courses display on the View Courses page. The deactivated courses display on the View Courses page if the **Show Deactivated** check box on the View Courses page is selected.
   - **Spoken Language*:** The spoken language of the course (for example, the language spoken by the instructor or the learners).
   - **Content Language:*** This setting determines where the ILT course displays when a user searches or browses within a selected language. Select **Not Specified** to ensure it displays in all searches regardless of a learner's selected content language, or select a language to include it only when a learner searches within that language.

For example:
An admin, Joe, creates an ILT course about leadership and sets the content language to Spanish. A learner, Kim, searches for an ILT course about leadership, but her content language in Skillport Learner is set to English (United States). Kim won't see the ILT course because it isn't marked as English (United States). If Joe sets the content language to **Not Specified**, Kim would be able to see the ILT course regardless of her set content language.

- **Duration**: Enter the duration of the course. This is the length of time required to complete a course. This field has a default value.

  Note: There is no correlation or checking of this value with the actual schedule information applied to a session.

- **Mastery Level (0-100%)**: The percentage score a learner must obtain to complete the course. The Mastery Level default value is **100**. If you submit the course with a blank value, it is considered zero (0).

- **Cost**: The cost and currency of the course.

  Note: Skillport does not bill learners. This is a notification to the learner that the course costs money.

- **Location:** The location of a course, whether it is to be held in a physical classroom or online.

  Note: Extended Attributes display if enabled. Classrooms can be added only after a facility is added. For information on adding a facility, refer to Add a Facility to a Course. For information on adding a classroom, refer to Create a New Classroom.

- **Description**: The description of the course.

5. Add the administration details.

6. Click **Save & Add Sessions** to save the course and navigate to the **New Sessions** window. Alternatively, click **Save & Exit** to save the course and return to the **Course Manager** screen. **Cancel** dismisses the window without any changes saved and gets back to the main screen in the previous state.

Add Administration Details to a Course

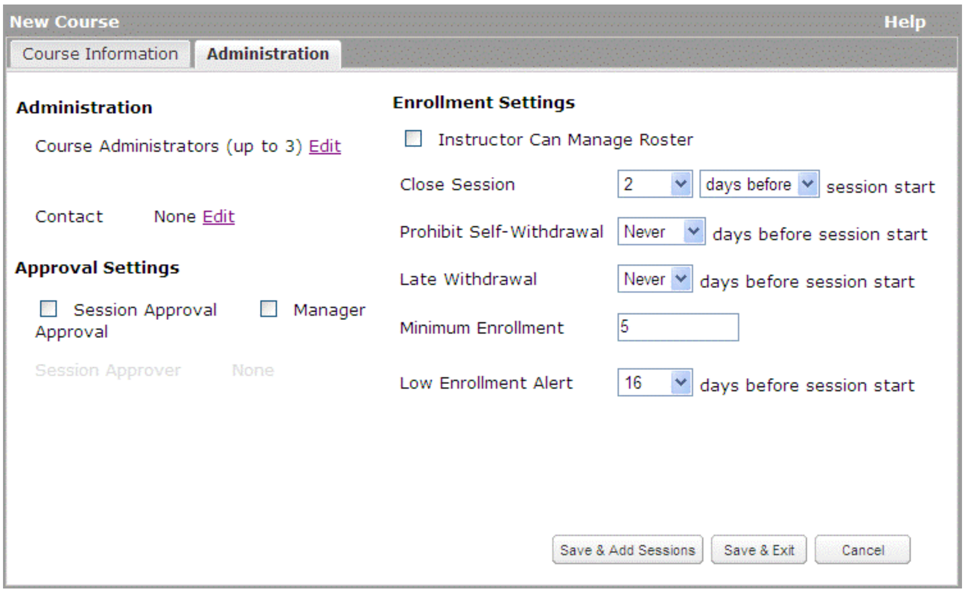
Additional details regarding administration can be added to a course while creating a new course. These details can also be set at the session level or overwritten at the session level. If they are set at the course level the session will automatically default to the settings.

To add administration details to a course

1. View Courses.

2. Click **New Course** or select the course from the list of courses and click **Edit Course** if you are editing the administration details.

3. Click the **Administration** tab.



4. Fill in the **Administration**, **Approval Settings** and **Enrollment Settings**.

   - **Course Administrators**: Select up to three course administrators.
   - **Contact**: You can edit or remove a contact.
   - **Session Approval/Manager Approval**: Select whether Session Approval or Manager Approval is required for this course.
   - **Instructor Can Manage Roster** :Select this checkbox to allow an Instructor to manage the course roster.
   - **Close Session**: Select when you wish to close the session to new enrollment by selecting the relevant entries from the drop-down.
   - **Prohibit Self-Withdrawal**: Select if and when to prohibit self-withdrawal from a session from the options in the drop-down.
   - **Late Withdrawal**: Select if and when a late withdrawal is possible from the options in the drop-down.
   - **Minimum Enrollment**: Enter the minimum number of enrollments possible.
   - **Low Enrollment Alert**: Select when you want to get an alert if there is low enrollment by selecting an option from the drop-down. This field does not display if Minimum Enrollment is zero.

5. Click **Save & Add Sessions** to save the course and navigate to the **Add Sessions** page. Alternatively, click **Save & Exit** to save the course and return to the **Course Manager** screen.

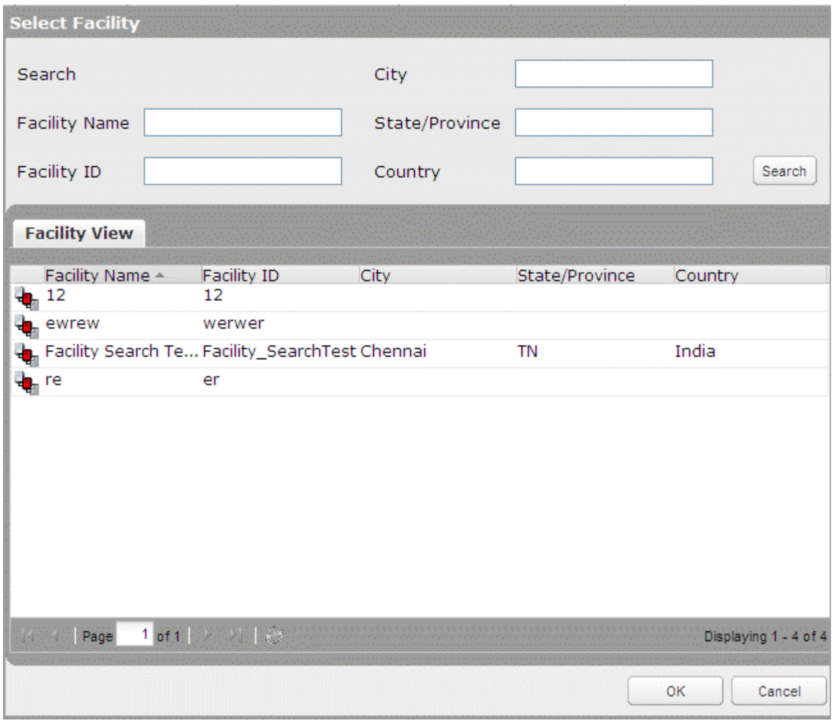
Note: **Cancel** will enable you to exit the **New Course** window without saving.

Select a Facility for a Course

You can associate a facility to a course or replace the association.

To add/edit a facility to a course

1. View Courses.
2. Click **New Course**.
3. Click **Edit** next to **Facility**. The **Select 1 Facility** window displays.



4. Select a facility from the list or use the search to list the required facilities.

   Note: You may search for the facility using the **Facility Name**, **Facility ID**, **City**, **State/Province** or **Country**.

5. Click **OK**.

Select a Classroom for a Course

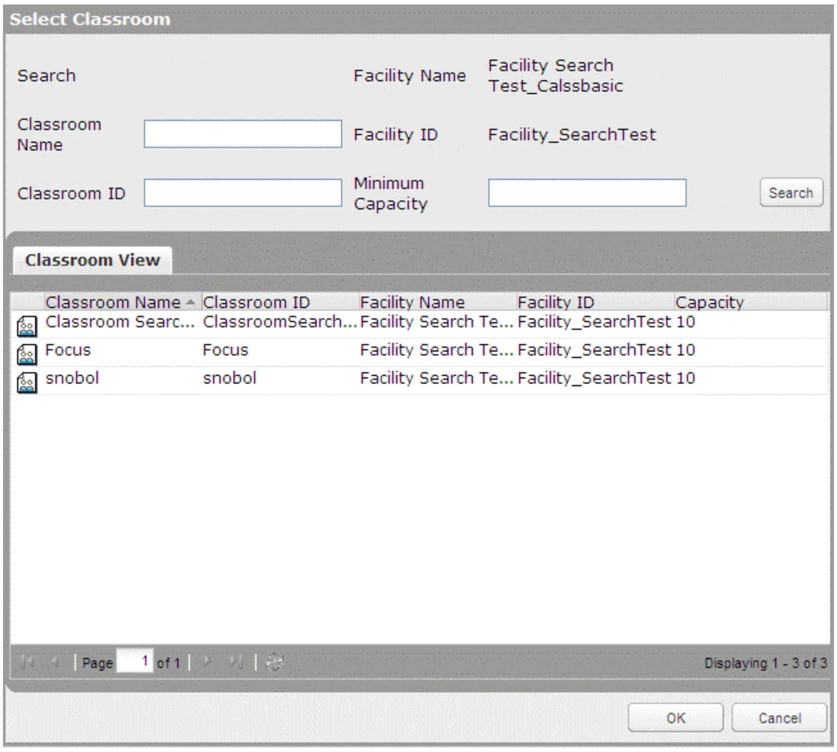
Once you have added a facility to a course, you can add a classroom. You can also edit an existing classroom.

Note: You can search for a classroom only if it exists within the selected facility.

To add/edit a classroom to a course

1. View Courses.
2. Click **New Course**.

3. Click **Edit** next to **Classroom**. The **Select 1 Classroom** window displays.



4. Select a classroom from the list or use the search to list the required classrooms.

Note: You may search for the facility using the **Classroom Name**, **Classroom ID**, **Facility Name**, **Facility ID** or **Maximum Capacity**.

5. Click **OK**.

Edit a Course
You can edit the details of a course if any changes are required.

Note: The option to edit a course on the Course Manager tab is enabled only if there is a course selected in the list of courses found in the Course Manager screen.

To edit a course

1. View Courses.
2. Click the course ID you wish to view.

   The **View Course** window displays.
3. Click **Edit**.
4. Edit the course details. For more information on course details, refer to Create a New ILT Course.

> **Note**: Course ID cannot be edited. Course Title can have HTML tags, but those tags will remain as text. In Description field, the HTML tags can be applied.

5. Click **Save**. The **Course Summary** displays the updated details for the course, and it is automatically republished to the Skillport Library.

Copy an ILT Course

If you want to create multiple courses with similar attributes, you can copy an existing course. This is a quick and efficient method for creating a series of related courses. All the details and field settings will be copied to the new course and you can edit fields as needed. While copying the course the course ID changes automatically.

> **Note**: To enable the copy button, you must select a course on the Course Manager grid. Only course details can be copied, not the sessions associated with the course.

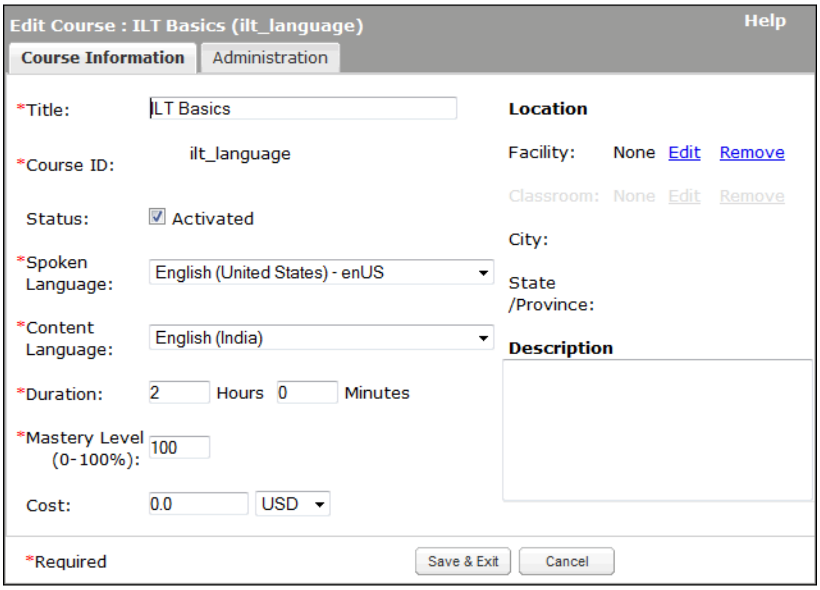
To copy a course

1. Click **Content** > **ILT** > **Course and Session Manager** on the navigation bar.
2. Click **Course Manager**.

   The ILT courses display.
3. Click a course name to select it.
4. Click **Copy**.

   > **Note**: You can also copy a course by viewing the ILT course details and clicking **Copy**.

   The **Copy Course** dialog box displays:



5. Edit the information:
   - **Title***: The title of the course as presented to learners. This does not need to be unique.

- **Course ID***: All course IDs begin with **ilt_** and are always unique. Once the course ID is saved, it cannot be changed.
- **Status**: This option activates or deactivates the course; by default the status is active. Active courses display on the View Courses page. The deactivated courses display on the View Courses page if the **Show Deactivated** check box on the View Courses page is selected.
- **Spoken Language*:** The spoken language of the course (for example, the language spoken by the instructor or the learners).
- **Content Language:*** This setting determines where the ILT course displays when a user searches or browses within a selected language. Select **Not Specified** to ensure it displays in all searches regardless of a learner's selected content language, or select a language to include it only when a learner searches within that language.

  For example:
  An admin, Joe, creates an ILT course about leadership and sets the content language to Spanish. A learner, Kim, searches for an ILT course about leadership, but her content language in Skillport Learner is set to English (United States). Kim won't see the ILT course because it isn't marked as English (United States). If Joe sets the content language to **Not Specified**, Kim would be able to see the ILT course regardless of her set content language.

- **Duration**: Enter the duration of the course. This is the length of time required to complete a course. This field has a default value.

  Note: There is no correlation or checking of this value with the actual schedule information applied to a session.

- **Mastery Level (0-100%)**: The percentage score a learner must obtain to complete the course. The Mastery Level default value is **100**. If you submit the course with a blank value, it is considered zero (0).
- **Cost**: The cost and currency of the course.

  Note: Skillport does not bill learners. This is a notification to the learner that the course costs money.

- **Location:** The location of a course, whether it is to be held in a physical classroom or online.

  Note: Extended Attributes display if enabled. Classrooms can be added only after a facility is added. For information on adding a facility, refer to Add a Facility to a Course. For information on adding a classroom, refer to Create a New Classroom.

- **Description**: The description of the course.

6. Add the administration details.
7. Click **Save & Exit**.
8. Optionally, using the email template that displays, send an email to the enrolled learners to inform them of the change.

Activate or Deactivate a Course

You can activate or deactivate a course if required. You can deactivate the course when the course has no sessions or the course has canceled and completed sessions. If the course has unconfirmed/confirmed sessions, it cannot be deactivated.

Note: Sessions cannot be created under the deactivated course.

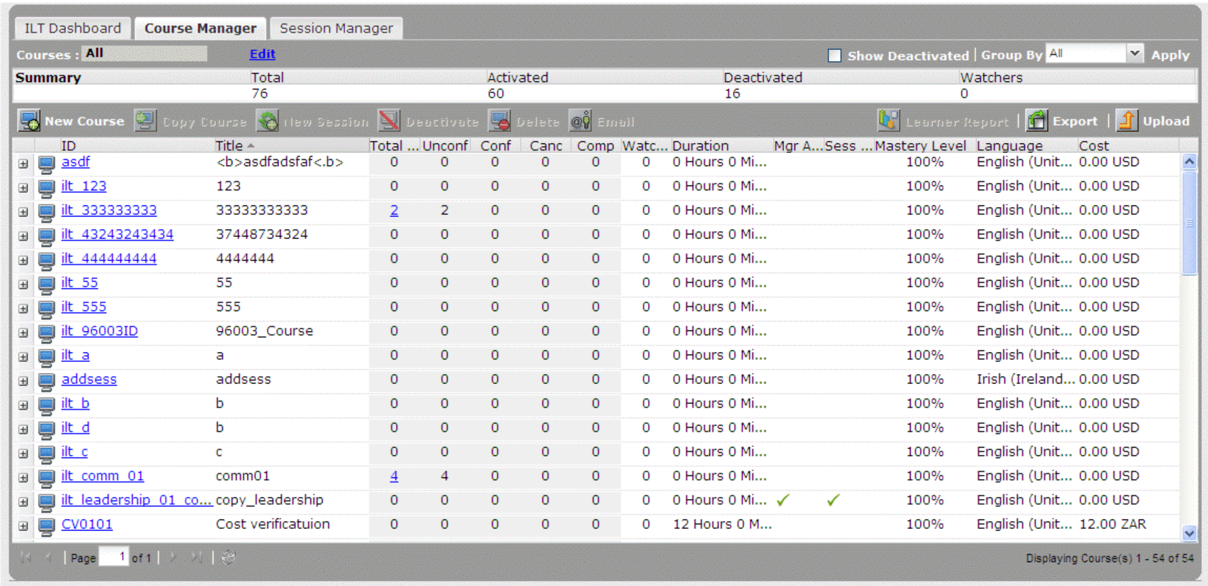
To deactivate a course

1. View Courses.
2. Click on a course to select it.
3. Click **Deactivate**. This deactivates the course.

   Note: The deactivate button is enabled only when the selected course has no sessions or canceled/completed sessions.

To activate a course

1. View Courses.



2. Select the **Show Deactivated** check box.
3. Click on the deactivated course to select it.
4. Click **Activate**. This activates the course.

Delete a Course

Deleting a course removes all history and any results that have been posted in association with this course. By following this procedure, all course results can be deleted and the course is removed from the courses list. A course cannot be deleted if there are sessions associated with it.

Note: The option to delete a course on the Course Manager tab is only enabled if a course is selected in the list.

To delete a course

1. View Courses.
2. Click on a course to select it.
3. Click **Delete.**
4. Click **OK**.

Note: You can also delete a course by opening the course details and clicking the **Delete** button. For more information on viewing the course details refer to View Course Details.

Session Manager

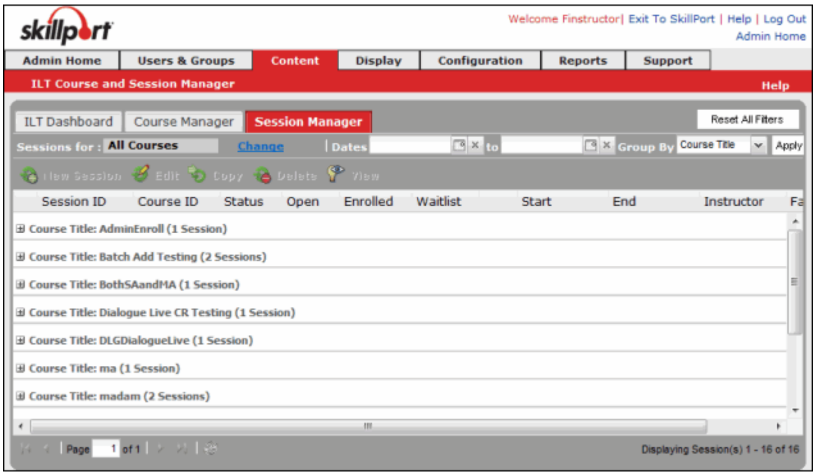
View Sessions

A session is a specific instance of a course, held in a facility, classroom, or virtually with an instructor and students.

The Session view displays the available sessions for all available courses.

To view sessions

1. Log in to Skillport and navigate to the Admin area.
2. Click **Content** > **ILT** > **Course and Session Manager** on the navigation bar.
3. Click **Session Manager**. The available sessions display.



4. Sort the session list by clicking the column headers to sort in ascending or descending order.

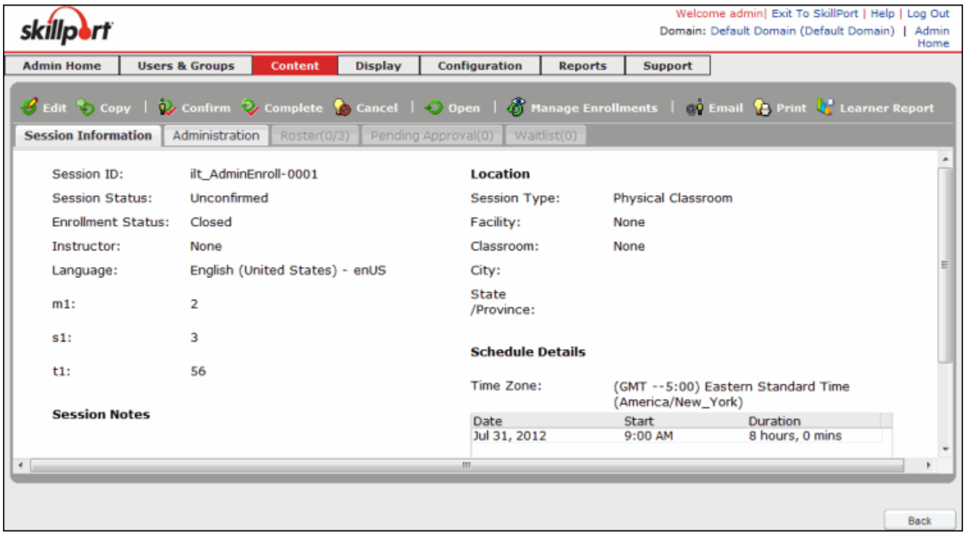
5. Use the **Group by** field to group sessions. The sessions can be grouped by:
   - Course ID
   - Course Title
   - Status
   - Open
   - Start Date
   - Instructor
   - Facility
   - City
   - Country
6. Select the Date Range by selecting the start and end date.

View Session Details
The session details view displays the details of a selected session for an available course.

To view sessions

1. View Sessions.
2. Click the **Session ID** you wish to view.

   The **View Session** window displays.



Create a New Session

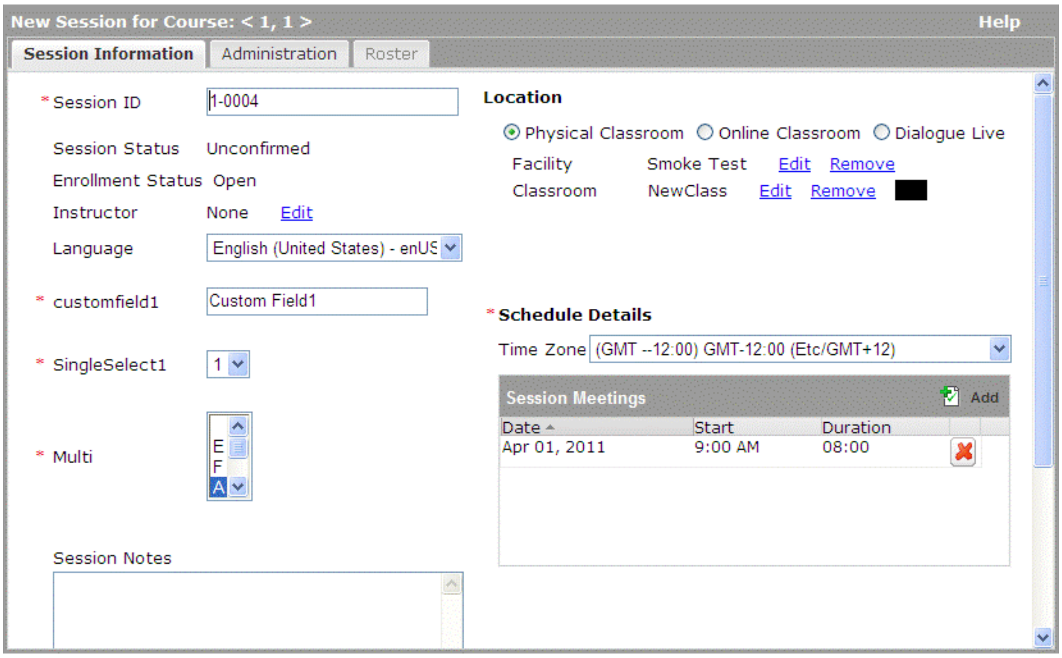
Use this process to create and enter details of a new Instructor Led Training (ILT) session for a specific course.

Note: ILT Course records contain many attributes that are attributes of a course's sessions (such as cost, facility, classroom, and enrollment rules). These are set at the course level as defaults for convenience, representing the most common values that are set in sessions. When a new ILT session is created, those values from the parent course record are auto-populated into the new session record. All inherited values can be overridden at the session level.

To create a new session

1. View Sessions.
2. Click the course for which you wish to create a session.
3. Click **New Session**.

   The **New Session** window displays:



4. Enter the following information:

   - **Session ID**: This is auto generated from the course ID and the session sequence. You can modify the session ID.
   - **Language**: Select the session language using the options in the drop-down.
   - **Location**: Select a session location:

     Physical Classroom: A physical facility, or a classroom within a selected facility, where the session is held.

     Online Classroom: A virtual classroom where learners use a website to attend the session.

Dialogue Live: A virtual classroom where learners access Dialogue Live to attend the session.

- **Session Notes**: Notes to learners that display wherever the session is viewed.
- **Schedule Details**: Select a time zone from the drop-down.

Note: Facilities and classrooms are inherited from the course. Different locations can result in different facilities and classrooms. For information on editing a facility or classroom, see Add a Facility for a Course and Add a Classroom to a Course.

5. Add Administration Details to a Session.
6. Do one of the following:
   - Click **Save & Add Another** to save the session and open another **New Session** window.
   - Click **Save & Exit** to save the course and return to the **Session Manager** screen.
   - Click **Cancel** to exit the window without saving your changes.

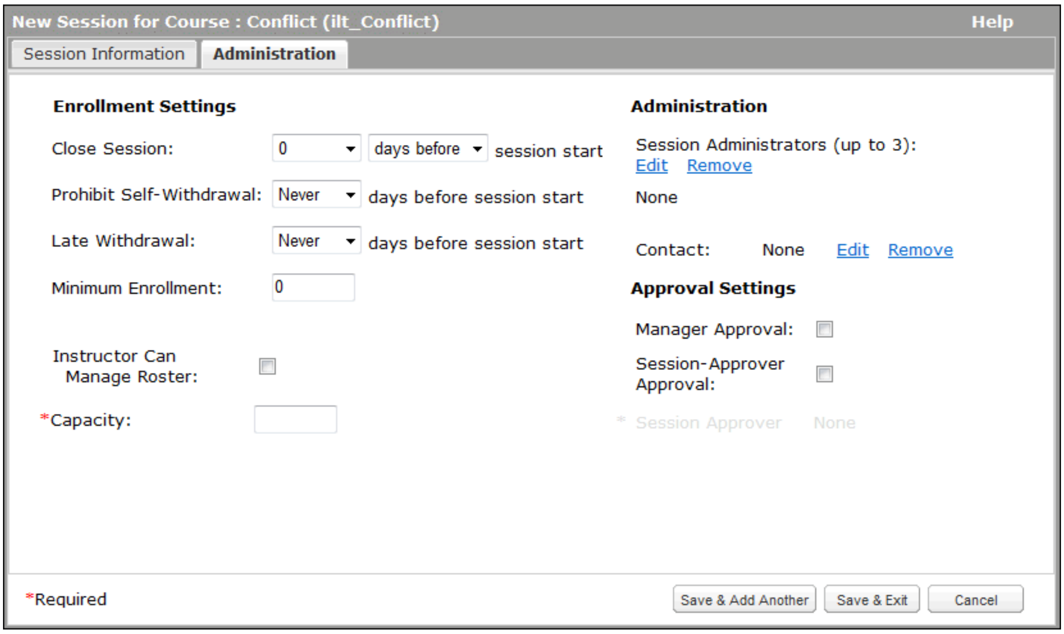
Add Administration Details to a Session

Additional details regarding administration can be added to a session while creating a new session. This is part of the process of creating a new session. They can also be added later if need be.

To add administration details to a session

1. View Sessions.
2. Click the course for which you wish to create a session.
3. Click **New Session**.

   The **New Session** page displays.
4. Click the **Administration** tab.



5. Enter the **Administration**, **Approval Settings** and **Enrollment Settings** information.

   - **Session Administrators:** Select up to three session administrators.
   - **Contact:** Edit or remove an existing contact.
   - **Session Approval/Manager Approval:** Enable or disable Session Approval or Manager Approval for the session.
   - **Session Approver:** Select a contact to approve session enrollment requests. Enabled when Session Approval is selected.
   - **Instructor Can Manage Roster:** When selected, the session Instructor can determine enrollments and withdrawals.
   - **Close Session:** Determine the time frame when you wish to close the session using the options in the drop-down.
   - **Prohibit Self-Withdrawal:** Allow or prohibit self-withdrawal from a session using the options in the drop-down.
   - **Late Withdrawal:** Allow or prohibit late withdrawal using the options in the drop-down.
   - **Capacity*:** (Required field) Enter the required capacity (number of students) in the session.

   Note: The session capacity value determines when the session is full. Skillsoft recommends changing this value to your specific capacity.

   - **Minimum Enrollment:** Enter a minimum number of enrollments.
   - **Low Enrollment Alert** (not shown)**:** If a session has low enrollment, select this to enable email alerts. Choose notification options using the drop-down.

6. Click **Save & Add Another** to save the session and navigate to the **New Session** window. Click **Save & Manage Roster** to save the session and manage the roster. Alternatively, click **Save & Exit** to save the course and return to the **Session Manager** screen.

Confirm a Session
You can confirm a session as soon as you create it or when you have enough people enrolled in this session.

The confirmation process varies based on the policies and procedures of your company. The following are the ways the confirmation works:

- If you confirm as soon as you create a session, when an end user enrolls they only get one email with an Outlook calendar invite confirming their registration.
- If you confirm as soon as you create a session, and you do not get the minimum required, the course may be canceled and a notification sent.
- If you do not confirm the session until later, the end user will get one email indicating that they enrolled, and a second email with an Outlook calendar invite saying the session is confirmed after the session actually gets confirmed.

To confirm a session

1. View Sessions.
2. Click the **Session ID** you wish to confirm.
3. Click **Confirm**.

Open/Close a Session to Enrollment

To open a session to enrollment

1. View Sessions.
2. Click the **Session ID** you wish to open for enrollment.
3. Click **Open**.

To close a session to enrollment

1. View Sessions.
2. Click the **Session ID** you wish to close for enrollment.
3. Click **Close**.

Edit a Session
You can edit the details of a session if any changes are required.

To edit a session

1. View Sessions.
2. Select the session you wish to edit.
3. Click **Edit**. The **Edit Session** dialog box displays.

4. Edit the session details. For more information on session details, refer to View Session Details.

   Note: Enrollment Status and Session Status cannot be modified in the Edit Session window.

5. Click **Save**.

Copy a Session

If you want to create multiple sessions with similar attributes, you can copy an existing session. This is a quick and efficient method for creating sessions. All the details and field settings are copied to the new session and you can edit fields as needed. The Session ID is auto generated with the sequence for the last session in the selected course. The Enrollment Status and Session Status are not inherited from the original session.

Note: To enable the copy button, you must select a session on the Session Manager grid.

To copy a session

1. View Sessions.
2. Click on a session to select it.
3. Click **Copy**. The **Copy Session** dialog box displays.

   Note: You can also copy a session by opening the session details and clicking **Copy**. For more information on viewing the session details refer to View Course Details. The Copy Session window replicates all the information found in the session. However, the button **Save & Add Another Copy** should display in place of **Save & Add Another**.

Cancel an ILT Session

When you cancel an ILT session, the following occurs:

- All enrolled learners with a valid email address receive an email notifying them that the session is cancelled.
- The cancellation email includes an iCalendar attachment to remove the session from the learner's calendar.
- The status of all enrolled learners changes from **Enrolled** to **Withdrawn**.
- The ILT course the session is associated with is placed in all enrolled students' ILT Watchlist to ensure they are notified of newly-scheduled sessions of the course.
- Record of the cancelled session remains in the ILT Event Journal.

Note: Session cancellations must be performed individually. Batch cancellations are not allowed.

To cancel an ILT session

1. In Skillport Administrator, click **Content > ILT > Course and Session Manager**.

   The Course and Session Manager displays.
2. Click the **Course Manager** tab.

   The Course Manager page displays.
3. Click the name of the course containing the session you wish to cancel.
4. Click the **Sessions** tab.
5. Click the name of the session you wish to cancel.

   The following message displays:

   ```
   Cancelling the session will un-enroll all students, including those
   on the waiting list. You may later confirm this session will take
   place, but all students must re-enroll at that time.
   Do you really want to cancel this session?
   ```
6. Click **OK** to confirm the cancellation.

Delete a Session
You can delete a session if required. To be deleted, the session must have a status of Unconfirmed, Canceled, or Completed. The delete option is not available if the session has a status of Confirmed. To delete a confirmed session, you must cancel the session or mark the session as complete. Canceling the session will remove all learners from the roster, wait list and pending approval list and send a session cancelation notification to the learners.

Note: To enable the **Delete** button, you must select a session on the Session Manager grid.

Important: If you delete a session with a status of Unconfirmed before canceling the session, all learners will be removed from the roster, wait list and pending approval list, but they will not receive a notification that the session has been deleted. Therefore, it is strongly recommended that you first cancel the session before deleting it. All learners will then receive a session cancellation notification.

To delete a session

1. View Sessions.
2. Click the session you wish to delete.

   The **Delete** button enables.
3. Click **Delete**.
4. When the confirmation message displays, click **Yes**.

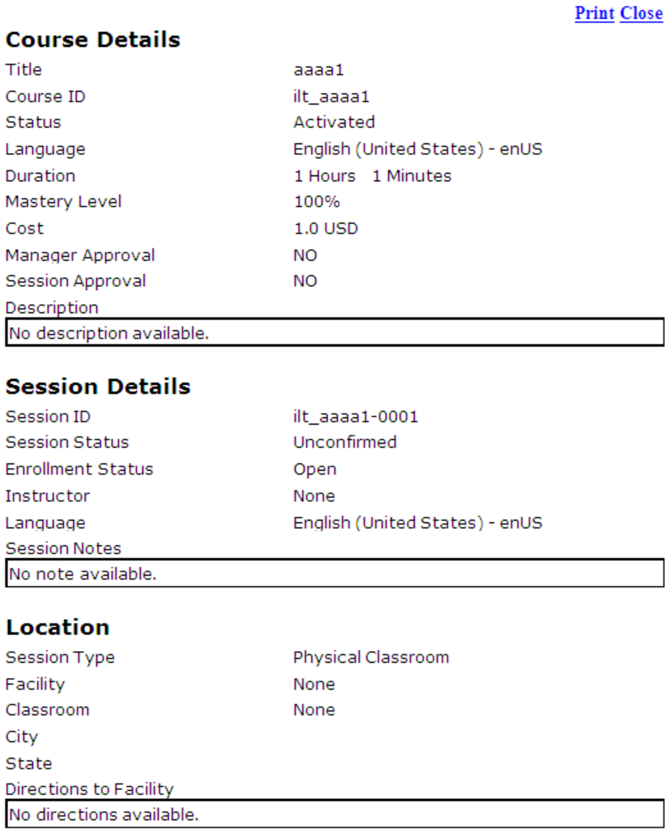
Print a Session
This enables you to print the session details. This option creates a printable version of session information. An HTML version of the report opens in a new browser window and displays all the information on the session details page. You can print the report or save it to your computer.

To print a session

1. View Sessions.

2. Click on the session you require.

3. Click **Print**. The print dialog box displays.



Print Close

Course Details

Title	aaaa1
Course ID	ilt_aaaa1
Status	Activated
Language	English (United States) - enUS
Duration	1 Hours 1 Minutes
Mastery Level	100%
Cost	1.0 USD
Manager Approval	NO
Session Approval	NO
Description	

No description available.

Session Details

Session ID	ilt_aaaa1-0001
Session Status	Unconfirmed
Enrollment Status	Open
Instructor	None
Language	English (United States) - enUS
Session Notes	

No note available.

Location

Session Type	Physical Classroom
Facility	None
Classroom	None
City	
State	
Directions to Facility	

No directions available.

4. Click **Print** to open your printer settings and print the session details.

Email Learners Enrolled in a Session
This enables you to email all enrolled and wait-listed learners. This option emails updates to learners whenever there is a change in the session status or to the schedule. Administrators can manually send messages to enrolled learners and instructors. Instructors can also manually send messages to learners on the roster, including wait-listed learners.

To email a learner

1. View Sessions.

2. Click on the session you require.

3. Click **Email**. The email dialog box displays.

4. Click the **To** and/or the **Cc** button to select specific users or groups from a list. Also you can add users to the **Bcc** list.

> **Note**: To add a Bcc, you can select users from the Session Enrolled List, Session Wait List, Course Wait List and Course Watch List. Do this by selecting the checkbox next to their names and click **Submit**.

5. Click **Send** to send the mail.

Export a Learner Report
You can generate a report that contains the student results for a selected course. You can then save a Comma Separated Value (CSV) version of the report and open it in other programs such as a spreadsheet or database application.

Note: The Learner Report includes data for both active and deactivated users. There may be a difference in the number of users displayed in this report and on the **Roster** tab, which only displays active users.

Note: The **Learner Report** option on the Course Manager tab is only enabled if a course is selected in the grid.

To export a learner report

1. View Courses.
2. Click the **Course ID** you wish to use to generate the Learner report.
3. Click **Learner Report**.
4. In the **File Download** prompt, **Open** or **Save** the report.
5. The following information can be obtained from the resulting .csv document that you download:
   - Session ID
   - Course ID
   - Course Name
   - Student Login
   - Last Name
   - First Name
   - Learner Status*****
   - Email
   - Enrollment Date
   - Passed
   - Attended
   - Mastered

- Instructor Login
- Instructor Last Name
- Instructor First Name
- Facility ID
- Facility Name
- Classroom ID
- Classroom Name
- Phone
- Alternate Phone
- Passcode
- URL
- Start
- Finish
- Notes

***Note**: Learner Status does not always indicate whether or not the learner has completed the session. This value is related to the status of the ILT session. For instance, if an administrator marks a session as completed, the Learner Status for any users enrolled in the session will be marked as Completed, even if the user did not complete the session. If the session is unconfirmed, the enrolled learner's status will be marked as Pending Session.

ILT Email Notifications

The table below shows the events, triggers, and email recipients for the various ILT email notifications. Note that the following notifications are sent with an iCal calendar update:

- Enrollment Withdrawal Notification
- Enrollment Request Approved by Administrator/Approver
- Instructor Change Notification
- Enrollment Status Change Notification
- Session Cancelled
- Session Updated

Event	Trigger	Notifications
Course Created	Any of the course attributes are updated: ▪ Title ▪ Language ▪ Active Status ▪ Description	To: ▪ Course Administrator(s) Bcc: ▪ Watch List Learner Optional: ▪ Course Interest List
Course Copied	Any of the course attributes are updated: ▪ Title ▪ Language ▪ Active Status ▪ Description	To: ▪ Course Administrator(s) Bcc: ▪ Watch List Learner Optional: ▪ Course Interest List
Course Deactivated/Removal	A course is deactivated or deleted.	To: ▪ Course Administrator(s) Bcc: ▪ Watch List Learner Optional: ▪ Course Interest List

Approval for Enrollment Request by Learner	Learner registers for a course which requires approval	To: ▪ Approval Manager ▪ Session Approver
Enrollment Request Approved by Administrator/Approver	Administrator or Approver approves a learner's request for enrollment.	To: ▪ Approved Students
Enrollment Request Denied by Administrator/Approver	Administrator or Approver denies a learner's request for enrollment.	To: ▪ Declined Learners
Enrollment Request Awaiting Approval	A specified number of days have passed after an enrollment request has been sent to the approver, but the approval has not been granted.	To: ▪ Approval Manager ▪ Session Approver Email ▪ Awaiting Approval Learner
Request for Enrollment Expired	An enrollment request has expired without approval, based on a pre-defined number of days.	To: ▪ Awaiting Approval Learner
Enrollment Request Approved by Administrator	Administrator, instead of the Approver, approves a learner's enrollment request.	To: ▪ Approval Manager ▪ Session Approver
Enrollment Request Denied by Administrator	Administrator, instead of the Approver, denies a learner's enrollment request.	To: ▪ Approval Manager ▪ Session Approver
Enrollment Status Change Notification	Enrollment status changes for a learner.	To: ▪ Learner
Enrollment Withdrawal Notification	Approver withdraws a learner from a session of a course.	To: ▪ Instructor Email ▪ Learner Email Cc: ▪ Session Admin Bcc: ▪ Approval Manager ▪ Session Approver Email
Ad Hoc Email to a	An Administrator with rights to	To:

Course Watch List	the course's Watch List members sends an ad hoc message to the group.	▪ Course Owned By Email Bcc: ▪ Watch List Learners
Course Activated	Course is activated.	To: ▪ Course Administrator(s) Bcc: ▪ Watch List Learner
Course Updated	Any of the course attributes are updated: ▪ Title ▪ Language ▪ Active Status ▪ Description	To: ▪ Course Administrator(s) Bcc: ▪ Watch List Learner Optional: ▪ Course Interest List
Course Removal	A course is deactivated or deleted.	To: ▪ Course Administrator(s) Bcc: ▪ Watch List Learners
Instructor Change Notification	An instructor for a session has changed.	To: ▪ Instructor(New) ▪ Instructor (Old) Cc: ▪ Session Administrator(s)
Notify All Enrolled and Waitlisted Learners in a Session	The "Mail Learners" function is triggered in session view.	To: ▪ Instructor ▪ Session Administrator(s)
Session Created	A new session of a course is created.	To: ▪ Instructor; ▪ Session Administrator(s) Bcc: ▪ Course Watch List Learners

Session Updated	Any of the following session details are updated: ▪ Facility ▪ Classroom ▪ Schedule ▪ Session Type	To: ▪ Instructor ▪ Session Administrator(s) Bcc: ▪ Enrolled Learner
Session Deleted	A session of a course is deleted.	To: ▪ Instructor ▪ Session Administrator(s)
Session Cancelled	A session of a course is cancelled.	To: ▪ Instructor ▪ Session Administrator(s) Bcc: ▪ Session Approver ▪ Approval Manager ▪ Learners
Session Closed	A session of a course is closed to additional enrollments.	To: ▪ Instructor; ▪ Session Administrator(s) Bcc: ▪ Approvers/Managers for Pending Approval Learner ▪ Pending Approval Learner ▪ Waiting List Learner
Session Closed – Roster Listing	A session of a course is closed to additional enrollments.	To: ▪ Instructor ▪ Session Administrator(s)

Session Confirmed	A session of a course is confirmed.	To: ▪ Instructor ▪ Session Administrator(s) Bcc: ▪ Pending Session Learner ▪ Approval Manager ▪ Session Approver
Session Enrollment Limit	Either: 1. Enrollments for a session reach or cross a session's maximum limit, or 2. Enrollments for a session reach or cross a session's threshold minimum limit.	To: ▪ Session Administrator(s)
Enrollment Request by Learner	In the case where both the Approval Manager and Session Approver must act, this email is sent when one approver has approved the request as a reminder to the remaining approver to act, too.	To: ▪ Approval Manager ▪ Session Approver
Session Seats Become Available – Watch List	1. A session is at or over capacity, and 2. One or more withdrawals occurs to take enrollment below capacity, and 3. A session is closed to enrollments (also meaning there is no Wait List), and 4. The Parent Course does have a Watch List	To: ▪ Watch List Learners
Session Re-opened for Enrollment	A course session which was previously closed has been re-opened for additional enrollments.	To: ▪ Session Admin(s) ▪ (parent) Course Admin(s) ▪ Session Instructor

Resources

ILT Resources include Facilities, Classrooms and Contacts. Resources can be added to your ILT site individually or by using the batch upload feature. Administrators can then assign a facility, classroom and contact to courses and sessions.

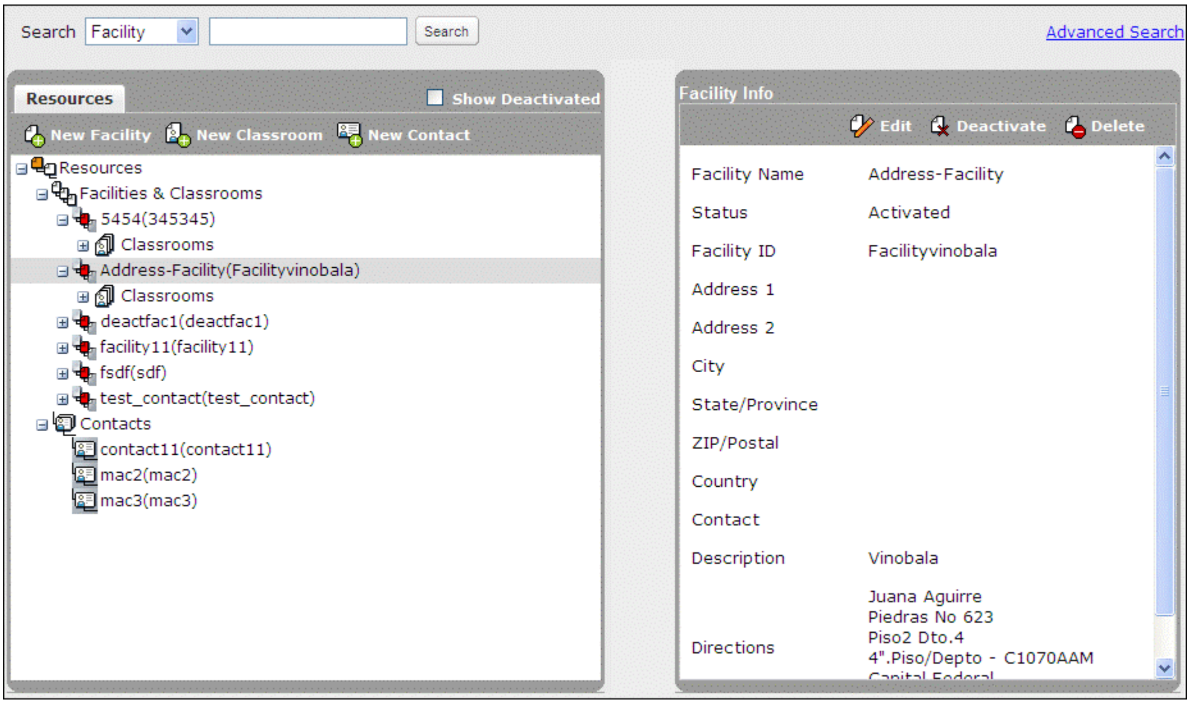
View Resources

You can create, modify, deactivate or delete a resource using the Resource Management page. The three resources available in ILT are:

- **Facilities**: Available training locations, such as conference centers or corporate buildings.
- **Classrooms**: Training rooms available within each facility.
- **Contacts**: External companies or individuals that an Administrator may want to associate with a facility, course or session. For example, a session is having lunch catered and the Administrator wants to include the catering company contact on the session. The administrator would add the catering contact information to ILT and then assign that contact to the session.

To view resources

1. Log in to Skillport as an Administrator and navigate to the Admin area.
2. Click **Content** > **ILT** > **Resource Manager**. The Resource Management page displays.



- **Resources pane**: Displays the list of available resources. Click the expand icon to display the required resource.

  Note: You must expand a facility in order to view the list of classrooms available within that facility.

- **Info pane**: Displays information on the selected resource.

Search Resources

There are two methods of searching for resources i.e. basic search and advanced search.

To do a basic search for a resource

1. Log in to Skillport as Administrator and navigate to the Admin area.
2. Navigate to the Resource Management page.
3. Select the resource type you want to search for by using the drop-down list provided.
   - Facility
   - Classroom
   - Contact
4. Enter the name of the resource you are searching for in the text field provided.
5. Click **Search**. The results display in the Resource pane.

To do an advanced search for a resource

1. Navigate to the Resource Management page
2. Click **Advanced Search** on the top right hand corner of the page.
3. Select the resource type you want to search for by using the drop-down list provided.
   - Facility
   - Classroom
   - Contact
4. You can enter details in the following fields for more specific results.
   - Facility Name
   - Facility ID
   - City
   - State/Province
   - Country

   Note: You can choose to include deactivated extended attributes in your results by selecting the Include Deactivated checkbox.

5. Enter the name of the resource you are searching for in the text field provided.
6. Click **Search**. The results display in the Resource pane.

Facilities

View Facility Information

To view facility information

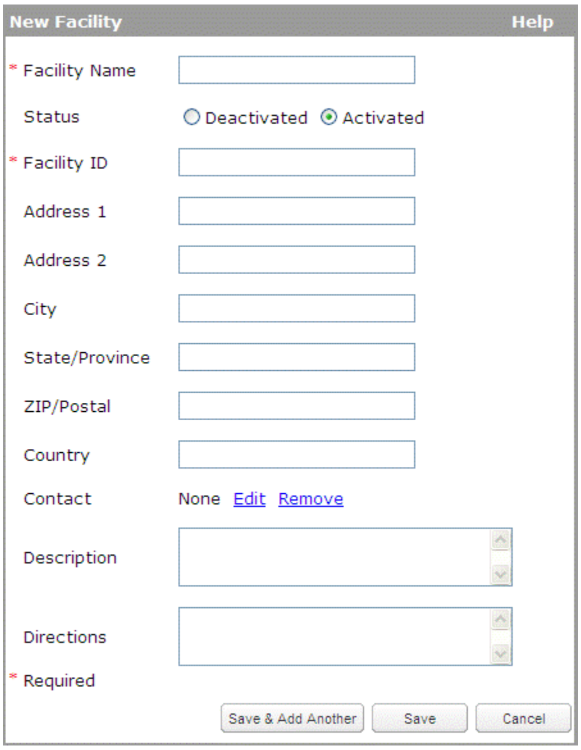
1. Log in to Skillport as Administrator and navigate to the Admin area.
2. Click **Content** > **ILT** > **Resource Manager**. The Resource Management page displays.
3. Browse or search for the required facility.

   The details of the selected facility display in the Info pane.

Create a New Facility

To create a new facility

1. Log in to Skillport and navigate to the Admin area.
2. Navigate to the Resource Management page.
3. Click **New Facility** in the Resources pane. The **New Facility** page appears.



4. Enter the required details.
5. Click **Save**. If you want to create another facility, click **Save & Add Another**.

Edit a Facility

To edit a facility

1. Log in to Skillport as Administrator and navigate to the Admin area.

2. Navigate to the Resource Management page.
3. Display the details of a required facility.
4. Click **Edit** in the Info pane.

   The **Edit Facility** page appears.
5. Make the required changes and click **Save**.

Activate or Deactivate a Facility
You can activate or deactivate a facility by following the steps given below. Alternatively you can also switch to the 'Activated' or 'Deactivated' radio button while in the **Edit Facility** window and save your changes.

Note: Activating a facility does not activate classrooms attached to that facility. Classrooms have to be activated explicitly. Deactivating a facility results in deactivating all the classrooms.

To activate or deactivate a facility

1. Log in to Skillport as Administrator and navigate to the Admin area.
2. Navigate to the Resource Management page.
3. Display the details of a required facility.
4. Click **Deactivate** in the Info pane. The Resource pane will refresh and the deactivated facility does not display in the Resource pane.

   Note: The deactivated facilities will only appear in the Resource pane, if the **Show Deactivated** check box is selected.
5. Make the required changes and click **Save**.

Delete a Facility
This procedure will enable you to delete the facility permanently and remove it from the Resource pane.

Note: A facility can be deleted only if it is not associated to any course/sessions.

To delete a facility

1. Log in to Skillport as Administrator and navigate to the Admin area.
2. Navigate to the Resource Management page.
3. Display the details of a required facility.
4. Click the **Delete** button in the Info pane.
5. Click **OK** to confirm the action.

   The facility is deleted and does not display in the Resource pane.

Classrooms

View Classroom Information

Using the Info pane, you can modify the details of a classroom.

To view classroom information

1. Log in to Skillport as Administrator and navigate to the Admin area.
2. Navigate to the Resource Management page.
3. Browse for the required classroom by expanding the facility to which the classroom is attached.

   Note: You can alternatively use the Search utility to find the classroom directly.

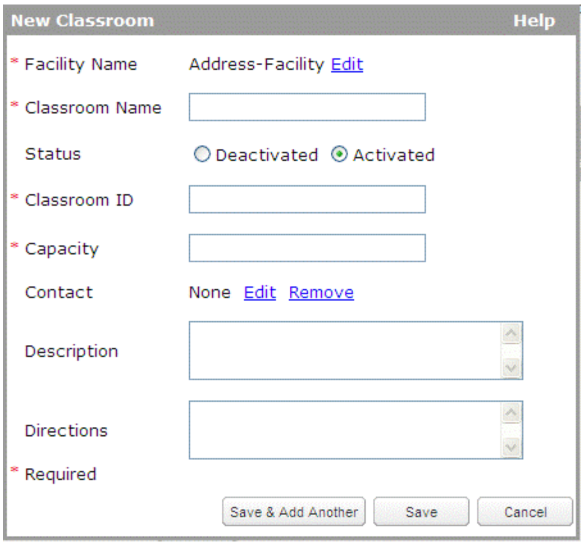
4. Expand the list of classrooms below the specific facility.
5. Select the required classroom.

   The details of the classrooms appear in the Info pane.

Create a New Classroom

To create a new classroom

1. Log in to Skillport as Administrator and navigate to the Admin area.
2. Navigate to the Resource Management page.
3. Click **New Classroom** in the Resources pane. The **New Classroom** screen appears.



4. Enter the required details.

   Note: The **Classroom ID** is unique across Skillport. The **Classroom Name** must be unique within the facility.

5. Click **Save**. If you want to create another classroom, click **Save & Add Another**.

Edit a Classroom

To edit a classroom

1. Log in to Skillport as Administrator and navigate to the Admin area.
2. Navigate to the Resource Management page.
3. Display the details of a required classroom.
4. Click **Edit** in the Info pane. The **Edit Classroom** page appears.
5. Make the required changes and click **Save**.

Activate or Deactivate a Classroom

You can activate or deactivate a classroom by following the steps given below.

Note: Classrooms have to be activated explicitly. Activating a facility does not activate classrooms attached to that facility. Deactivating a facility results in deactivating all the classrooms.

To activate or deactivate a classroom

1. Log in to Skillport as Administrator and navigate to the Admin area.
2. Navigate to the Resource Management page.
3. Display the details of a required classroom.
4. Click **Deactivate** in the Info pane. The Resource pane will refresh and the deactivated classroom does not display in the Resource pane.

   Note: The deactivated classrooms will only appear in the Resource pane, if the **Show Deactivated** check box is selected.

5. Make the required changes and click **Save**.

Delete a Classroom

This procedure will enable you to delete the classroom permanently and remove it from the Resource pane.

Note: A classroom can be deleted only if it is not associated to any course/sessions.

To delete a classroom

1. Log in to Skillport as Administrator and navigate to the Admin area.
2. Navigate to the Resource Management page.
3. Display the details of a required classroom.

4. Click **Delete** button in the Info pane.
5. Click **OK** for the confirmation message that appears.

Contacts

The contacts in the Resources section display external contact information (such as vendors or building owners). Within this view, you can create a hierarchy of contacts (for example, you can create a contact entry for a training vendor and then note all instructors associated with that vendor). You can sort contacts by Code, Name or Status. You can use the ILT Search bar to enter key words to narrow the results on the page.

Note: For your convenience, the ILT system maintains your contacts, but they are not used by Skillport in any way.

View Contact Information

Using the Info pane, you can modify the contact details of a particular owner of a facility. You can also use the Search bar to narrow the results on the page.

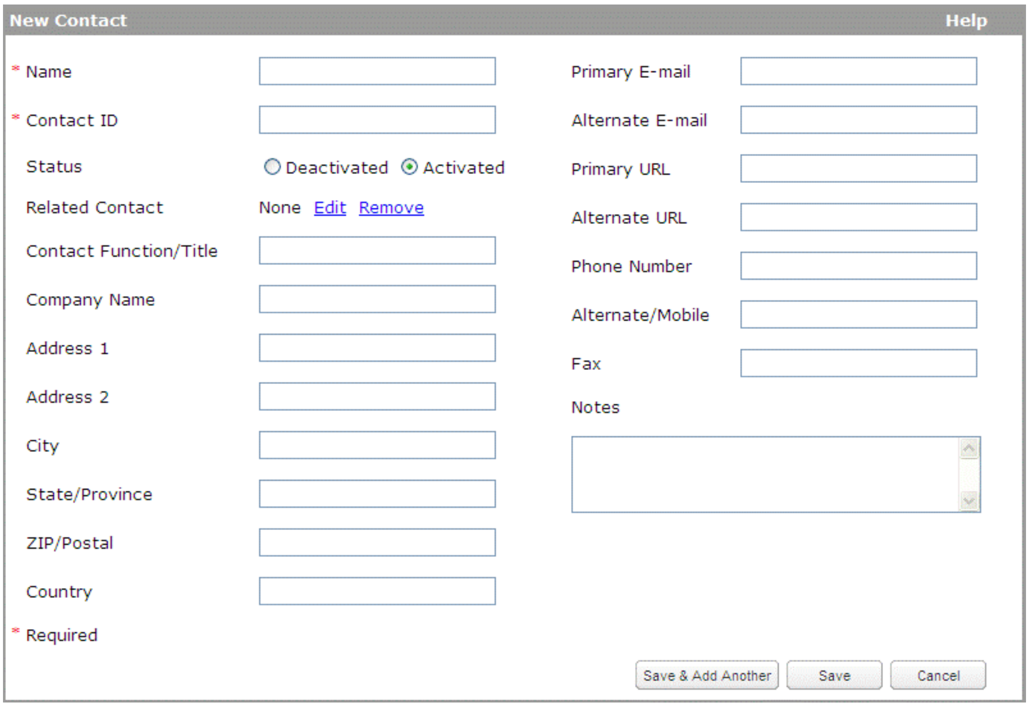
To view contact information

1. Log in to Skillport as Administrator and navigate to the Admin area.
2. Navigate to the Resource Management page.
3. Browse or search for the required contact. The details of the selected contact appear in the Info pane.

Create a New Contact

To create a new contact

1. Log in to Skillport as Administrator and navigate to the Admin area.
2. Navigate to the Resource Management page.
3. Click **New Contact** in the Resources pane. The **New Contact** page appears.



4. Enter the required details.

Note: The **Contact Name** and **Contact ID** must be unique. If the contact person cannot be reached, the contact entered in the **Related Contact** field is the next point of contact to get the details about the courses, sessions, facilities and classrooms.

5. Click **Save**. If you want to create another contact, click **Save & Add Another**.

Edit a Contact

To edit a contact

1. Log in to Skillport as Administrator and navigate to the Admin area.
2. Navigate to the Resource Management page.
3. Display the details of a required contact.
4. Click **Edit** in the Info pane. The **Edit Contact** page appears.
5. Make the required changes and click **Save**.

Activate or Deactivate a Contact
You can activate or deactivate a contact by following the steps given below.

To activate or deactivate a contact

1. Log in to Skillport as Administrator and navigate to the Admin area.
2. Navigate to the Resource Management page.
3. Display the details of a required contact.
4. Click **Deactivate** in the Info pane. The Resource pane will refresh and the deactivated contact does not display in the Resource pane.

   Note: The deactivated contacts will only appear in the Resource pane, if the **Show Deactivated** check box is selected.

5. Make the required changes and click **Save**.

Delete a Contact
This procedure will enable you to delete the classroom permanently and remove it from the Resource pane.

Note: A contact can be deleted only if it is not associated to any course, session, facility, classroom or contact.

To delete a contact

1. Log in to Skillport as Administrator and navigate to the Admin area.

2. Navigate to the Resource Management page.
3. Display the details of a required contact.
4. Click **Delete** in the Info pane.
5. Click **OK** for the confirmation message that appears.

   The contact is deleted and does not display in the Resource pane.

Upload ILT Content

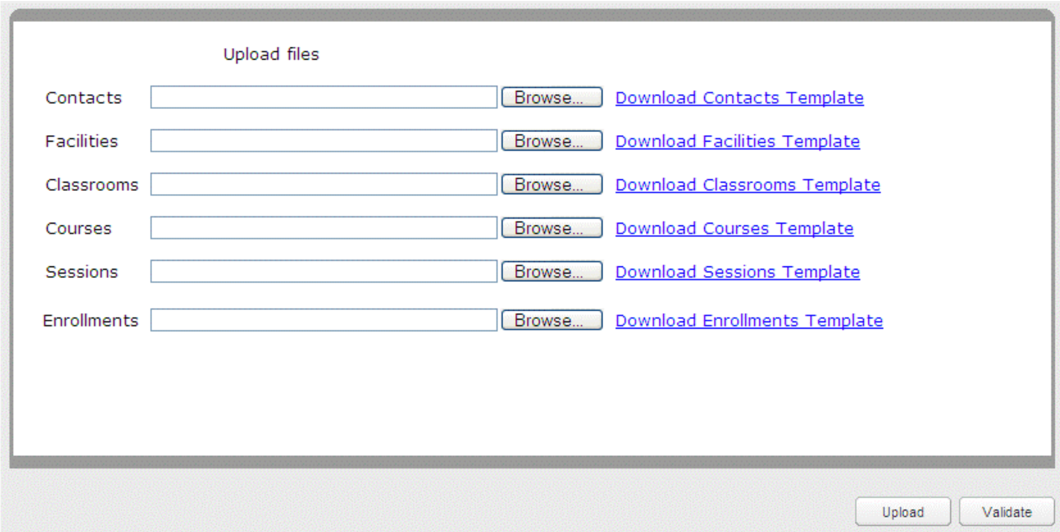
You can use the Batch Add view to bulk-upload contacts, facilities, classrooms, courses, sessions and enrollments. Use it to upload data from another system, spreadsheet, or data from a third party (such as an external session vendor).

Upload a Batch of ILT Content

To upload ILT content

1. Click **Content** > **ILT** > **Batch Add**.

   The upload screen displays.



   Note: If there is more than 1 file to be uploaded at the same time, the order the uploads are processed follows how they are ordered on the screen.

2. Download the correct .csv file for the type of data you wish to upload. For details about each template, see:
   - Contacts Template
   - Facilities Template
   - Classrooms Template
   - Courses Template
   - Sessions Template
   - Enrollments Template
3. Once you've completed the .csv file, click **Browse** next to the file type that you want to upload.

   The **Choose File** window displays.
4. Navigate to the .csv file you want to upload.
5. Click the .csv file to select it.

6. Click **Open**.

   The path to your .csv file displays in the field.

7. Repeat these steps for each file type you want to upload.

8. Click **Validate** to validate the .csv file(s).

9. Click **Upload**.

   The upload process begins. If you have a valid email address, an email is sent containing the URL of a status report and the date and time of the batch submission.

Contacts Template

Use the **Contacts Template** to upload contact records quickly and easily. The table below shows the correct data format for each field in the template.

Field Name	Format
Name	Field is required. Field value must be unique. Field must be less than or equal to 80 characters.
Status	The field is required. The field must be one of 0 or 1 where 0 is Deactivated and 1 is Activated.
Contact ID	Field is required. Field value must be unique. Field must not contain any leading or trailing spaces. Field must be less than or equal to 25 characters.
Contact Function/Title	Field is optional. Field must be less than or equal to 80 characters.
Related Contact ID	Field is optional. Field must match an existing contact or one in the contact upload file.
Company Name	Field is optional. Field must be less than or equal to 80 characters.
Primary E-mail	Field is optional. Field must be a valid email address. Field must be less than or equal to 80 characters.
Alternate E-mail	Field is optional. Field must be a valid email address. Field must be less than or equal to 80 characters.
Primary URL	Field is optional. Field must be a legal URL. Field must be less than or equal to 80 characters.
Alternate URL	Field is optional. Field must be a legal URL. Field must be less than or equal to 80 characters.
Phone Number	Field is optional. Field must be a legal phone number. Field must be less than or equal to 50 characters.
Alternate/Mobile	Field is optional. Field must be a legal phone number. Field must be less than or equal to 50 characters.
Fax	Field is optional. Field must be a legal fax number. Field must be less than or equal to 50 characters.
Address 1	Field is optional. Field must be less than or equal to 80 characters.
Address 2	Field is optional. Field must be less than or equal to 80 characters.
City	Field is optional. Field must be less than or equal to 50 characters.

State/Province	Field is optional. Field must be less than or equal to 25 characters.
ZIP/Postal	Field is optional. Field must be a valid zip code. Field must be less than or equal to 25 characters.
Country	Field is optional. Field must be less than or equal to 50 characters.
Notes	Field is optional. Field must be less than or equal to 2500 characters.

Facilities Template

Use the **Facilities Template** to upload facility records quickly and easily. The table below shows the correct data format for each field in the template.

Field Name	Format
Facility Name	Field is required. Field value must be unique. Field must be less than or equal to 80 characters.
Status	Field is required. Field must be one of 0 or 1.
Facility ID	Field is required. Field value must be unique. Field must be less than or equal to 20 characters.
Address 1	Field is optional. Field must be less than or equal to 80 characters.
Address 2	Field is optional. Field must be less than or equal to 80 characters.
City	Field is optional. Field must be less than or equal to 50 characters.
State/Province	Field is optional. Field must be less than or equal to 50 characters.
ZIP/Postal	Field is optional. Field must be less than or equal to 25 characters.
Country	Field is optional. Field must be less than or equal to 50 characters.
Contact Name	Field is optional. Field must match an existing contact.
Description	Field is optional. Field must be less than or equal to 2500 characters.
Directions	Field is optional. Field must be less than or equal to 2500 characters.

Classrooms Template

Use the **Classrooms Template** to upload classroom records quickly and easily. The table below shows the correct data format for each field in the template.

Field Name	Format
Facility ID	Field is required. Field must match an existing facility.
Classroom Name	Field is required. Field value must be unique. Field must be less than or equal to 80 characters.
Status	Field is required. Field must be one of 0 or 1.
Classroom ID	Field is required. Field value must be unique. Field must not contain leading or trailing spaces. Field must be less than or equal to 20 characters.
Capacity	Field is required. Field must be in the range 0-99999.

Contact Name	Field is optional. Field must match an existing contact.
Description	Field is optional. Field must be less than or equal to 2500 characters.
Directions	Field is optional. Field must be less than or equal to 1000 characters.

Courses Template

Use the **Courses Template** to upload course records quickly and easily. The table below shows the correct data format for each field in the template.

Field Name	Format
Course Title	Field is required. Field must be less than or equal to 255 characters.
Course ID	Field is required. Field must contain only alphanumeric characters or the '_' character and begin with `ilt_`. Field must be less than or equal to 40 characters, and spaces are not allowed.
Status	Field is required. Field must be one of 0 or 1. `0` - deactivated `1` - activated
Language	Field is required. Field must be a valid Locale (for example, `en-us`).
Duration	Field is optional. Field must be positive integer in the range `0-99999`.
Mastery Level	Field is required. Field must be in the range `0-100`.
Cost	Field is optional. Field must be a valid amount format according to currency specified and server locale.
Currency	Field is required. Field must be a valid code.
Manager Approval Required	Field is required. Field must be one of `0` or `1`. ▪ `0` - no ▪ `1` - yes
Session Approval Required	Field is required. Field must be one of `0` or `1`. ▪ `0` - no ▪ `1` - yes
Course Description	Field is optional. Field must be less than or equal to 3500 characters.
Course Administrator 1 User Name	Field is optional. Field must match an existing course administrator.
Course Administrator 2 User Name	Field is optional. Field must match an existing course administrator.

Course Administrator 3 User Name	Field is optional. Field must match an existing course administrator.
Session Approver User Name	Field is required if Session Approval Required has value `1`. Field must match an existing session approver.
Contact Name	Field is optional. Field must match an existing contact or one in the contact upload file.
Instructor Can Manage Roster	Field is required. Field must be one of `0` or `1`. ▪ `0` - no ▪ `1` - yes
Facility ID	Field is optional. Field must match an existing facility or one in the facility upload file.
Classroom ID	Field is optional. Field must match an existing classroom or one in the classroom upload file.
Close Session (days before/after session start)	Field is optional. Field must be in range {`-90 -60 -45 (-30.0 to 30.0) 45 60 90`}.
Prohibit Self-Withdrawal (days before session start)	Field is optional and can be one of the following: ▪ leave blank (renders a value of Never) ▪ `always` ▪ a number from `1` to `31`
Late Withdrawal (days before session start)	Field is optional and can be one of the following: ▪ leave blank (renders a value of Never) ▪ a number from `1` to `31`
Minimum Enrollment	Field is optional. Field must be in range `0-99999`.
Low Enrollment Alert (days before session start)	Field is optional. Field must be (never) or from `0` to `31`.
san1	Field is required. Field must match an existing item in the extended attribute list.
san2	Field is required. Field must be less than or equal to 250 characters.
san3	Field is required. Field must match an existing item in the extended attribute list.
2	Field is optional. Field must match an existing item in the extended attribute list.

Currency Codes for the ILT Course Batch Add CSV File
Use the table below to determine the correct currency abbreviation that corresponds to your country.

Currency Code	Country	Currency Type
AED	United Arab Emirates	Dirhams
ALL	Albania	Leke
ARM	Armenia	Dram
ARS	Argentina	Pesos
AUD	Australia	Dollars
BAM	Bosnia, Herzegovina	Convertible Marka
BGN	Bulgaria	Leva
BHD	Bahrain	Dinars
BOB	Bolivia	Bolivianos
BRL	Brazil	Brazil Real
BYR	Belarus	Rubles
CAD	Canada	Dollars
CHF	Switzerland	Francs
CLP	Chile	Pesos
CNY	China	Yuan Renminbi
COP	Colombia	Pesos
CRC	Costa Rica	Colones
CSD	Serbia	Dinars
CZK	Czech Republic	Koruny
DKK	Denmark	Kroner
DOP	Dominican Republic	Pesos
DZD	Algeria	Algeria Dinars
EEK	Estonia	Krooni
EGP	Egypt	Pounds
EUR	Euro Member Countries	Euro
GBP	United Kingdom	Pounds
GTQ	Guatemala	Quetzales
HKD	Hong Kong	Dollars
HNL	Honduras	Lempiras
HRK	Croatia	Kuna
HUF	Hungary	Forint
ILS	Israel	New Shekels

INR	India	Rupees
IQD	Iraq	Dinars
ISK	Iceland	Kronur
JOD	Jordan	Dinars
JPY	Japan	Yen
KES	Kenya	Shilling
KRW	Korea (South)	Won
KWD	Kuwait	Dinars
LBP	Lebanon	Pounds
LTL	Lithuania	Litai
LVL	Latvia	Lati
LYD	Libya	Dinars
MAD	Morocco	Dirhams
MDL	Moldova	Leu
MGA	Madagascar	Ariary
MGF	Madagascar	Franc
MKD	Macedonia	Denars
MUR	Mauritius	Rupee
MXN	Mexico	Pesos
MYR	Malaysia	Ringgit
NGN	Nigeria	Naira
NIO	Nicaragua	Cordobas
NOK	Norway	Krone
NZD	New Zealand	Dollars
OMR	Oman	Rials
PAB	Panama	Balboa
PEN	Peru	Nuevos Soles
PHP	Philippines	Pesos
PLN	Poland	Zlotych
PYG	Paraguay	Guarani
QAR	Qatar	Rials
RON	Romania	New Lei
RSD	Serbia	Dinars
RUB	Russia	Rubles
SAR	Saudi Arabia	Riyals
SDG	Sudan	Pounds

SEK	Sweden	Kronor
SGD	Singapore	Dollars
SKK	Slovakia	Koruna
SVC	El Salvador	Colones
SYP	Siyria	Pounds
THB	Thailand	Baht
TND	Tunisia	Dinars
TRY	Turkey	New Lira
TWD	Taiwan	New Dollars
UAH	Ukraine	Hryvnia
UGX	Uganda	Shilling
USD	United States of America	Dollars
UYU	Uruguay	Pesos
VEF	Venezuela	Bolivares Fuertes
VND	Viet Nam	Dong
XAF	Communauté Financière Africaine (BEAC) CFA	Francs
XOF	Communauté Financière Africaine (BCEAO)	Francs
XPF	Comptoirs Français du Pacifique (CFP)	Francs
YER	Yemen	Rials
ZAR	South Africa	Rand

Sessions Template

Use the **Sessions Template** to upload session records quickly and easily. The table below shows the correct data format for each field in the template.

Field Name	Format
Session ID	Field is required. Field must be less than or equal to 50 characters.
Status	Field is required. Field must be one of the following: ▪ `Unconfirmed` ▪ `Confirmed` ▪ `Completed` ▪ `Canceled`

Facility ID	Field is optional. Field must match an existing facility.
Classroom ID	Field is optional. Field must match an existing classroom or one in the classroom upload file.
Course ID	Field is required. Field must match an existing course or one in the course upload file.
Language	Field is required. Field must be a valid locale (for example, `en-us`).
Capacity	Field is required. Field must be in the range `0-99999`.
Instructor User Name	Field is optional. Field must match an existing instructor.
Time Zone	Field is required. Field must be a legal time zone (for example, `America/New_York`).
Contact ID	Field is optional. Field must match an existing contact.
Notes	Field is optional. Field must be less than or equal to 2500 characters.
Schedule Time	Field is required if Status is Confirmed. Field must be of the format `mm/dd/yyyy hh:mm` (for example, 10/12/1972 13:54).
Duration	Field is required if Status is `Confirmed`. Field must be a valid float in range `0.0-24.0`.
Session Administrator 1 User Name	Field is optional. Field must match an existing session administrator.
Session Administrator 2 User Name	Field is optional. Field must match an existing session administrator.
Session Administrator 3 User Name	Field is optional. Field must match an existing session administrator.
Manager Approval Required	Field is required. Field must be either 0 or 1. ▪ `0` - Not required ▪ `1` - Required
Session Approval Required	Field is required. Field must be either 0 or 1. ▪ `0` - Not required ▪ `1` - Required
Session Approver User Name	Field is required if Session Approval Required has value `1`. Field must match an existing session approver.
Instructor Can Manage Roster	Field is required. Field must be either 0 or 1. ▪ `0` - Not required ▪ `1` - Required
Type	Field is optional. Field must be : ▪ `0` for Physical Classroom, or

	▪ `1` for Dialogue Live, or ▪ `2` for Other
Phone	Field is optional. Field must be less than or equal to 50 characters.
Alt Phone	Field is optional. Field must be less than or equal to 50 characters.
Passcode	Field is optional. Field must be less than or equal to 20 characters.
URL	Field is optional. Field must be less than or equal to 255 characters.
Open to Enrollment	Field is required. Field must be either 0 or 1. ▪ `0` - closed to enrollment ▪ `1` - open to enrollment
Close Session (days before/after session start)	Field is optional. Field must be in range {`-90 -60 -45 (-30.0 to 30.0) 45 60 90`}.
Prohibit Self-Withdrawal (days before session start)	Field is optional and can be one of the following: ▪ leave blank (renders a value of Never) ▪ `always` ▪ a number from `1` to `31`
Late Withdrawal (days before session start)	Field is optional and can be one of the following: ▪ leave blank (renders a value of Never) ▪ a number from `1` to `31`
Minimum Enrollment	Field is optional. Field must be in range `0-99999`.
Low Enrollment Alert (days before session start)	Field is optional. Field must be (never) or from `0` to `31`.
san1	Field is required. Field must match an existing item in the extended attribute list.
san2	Field is required. Field must be less than or equal to 250 characters.
san3	Field is required. Field must match an existing item in the extended attribute list.
2	Field is optional. Field must match an existing item in the extended attribute list.

Enrollments Template

Use the **Enrollments Template** to upload registrations quickly and easily. The table below shows the correct data format for each field in the template.

Field Name	Format
Session ID	Field is required. Field must match an existing session ID.
Student Login	Field is required. Field must be a Skillport login id.
Send Notification	Field is required. Field must be one of 0 or 1 where 0 is not send and 1 is send.

ILT Event Journals

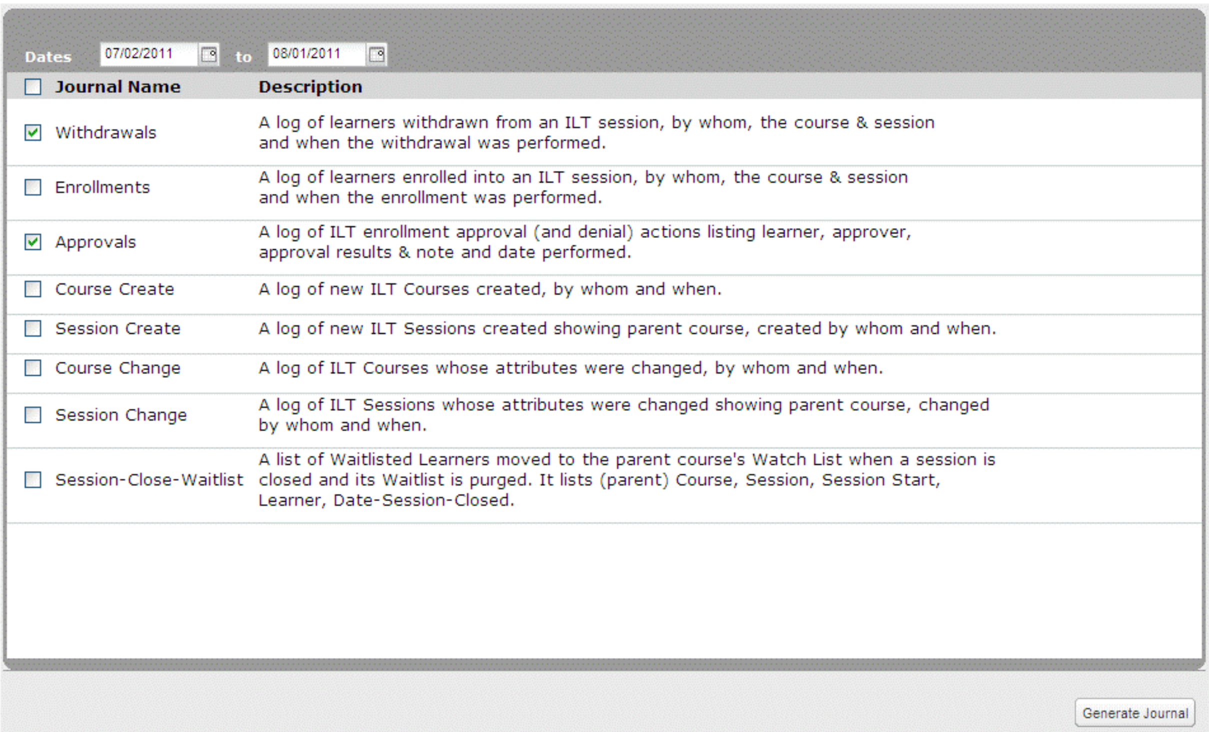
Use the Event Journals view to run journals (reports) on various ILT functions, such as enrollments, approval decisions, sessions, and courses.

Note: When an ILT Administrator changes a session schedule after the session has been set to **Completed**, Skillport reporting and ILT Event Journals do not reflect this change. Only the data as recorded in the database at the time the session is marked as complete is reflected; additional changes do not render.

To view and generate event journals

1. Click **Reports** > **ILT Event Journals**.

   The ILT Event Journal page displays:



2. Select the journals you wish to view using the checkboxes available.

- **Withdrawals**: A log of learners withdrawn from an ILT session, by whom, the course and session and when the withdrawal was performed. Withdrawal data includes Withdrawn For, Withdrawn By, Title, Session ID, Withdrawal Date and Withdrawal Time.
- **Enrollments**: A log of learners enrolled into an ILT session, by whom, the course and session and when the enrollment was performed. Enrollment data includes Learner Name, Enrolled By, Title, Session ID, Enrollment Date and Enrollment Time
- **Approvals**: A log of ILT enrollment approval (and denial) actions listing learner, approver, approval results and notes and date performed. This report lists the Learner, Approver, Approval Results, Notes, Date and Time.
- **Course Create**: A log of new ILT Courses created, by whom and when. Course Create data includes Course Created By, Course ID, Title, Date and Time.
- **Session Create**: A log of new ILT Sessions created showing parent course, created by whom and when. Session Create data includes Session Created By, Session ID, Title, Date and Time.
- **Course Change**: A log of ILT Courses whose attributes were changed, by whom and when. Course Change data includes Course Changed By, Course ID, Title, Attribute Changed, Date and Time.
- **Session Change**: A log of ILT Sessions whose attributes were changed showing parent course, changed by whom and when. Session Change data includes Session Changed By, Session ID, Title, Attribute Changed, Date and Time.
- **Session-Close-Waitlist**: A list of Waitlisted Learners moved to the parent course's Watch List when a session is closed and its Waitlist is purged. It lists Title, Session ID, Session Start Date, Session Start Time, Wait List Learner, Session Close Date and Session Close Time.

3. Click **Generate Journal** to download the specified journals. A .zip file downloads.
4. Extract the contents of the .zip file.
5. Open the .csv file(s) to view the contents of each journal.

Note: The .csv file(s) can be opened in spreadsheet programs (such as Microsoft Excel).

Instructor Features

As an instructor, you can manage most of the ILT sessions details you deliver and also manage the session roster.

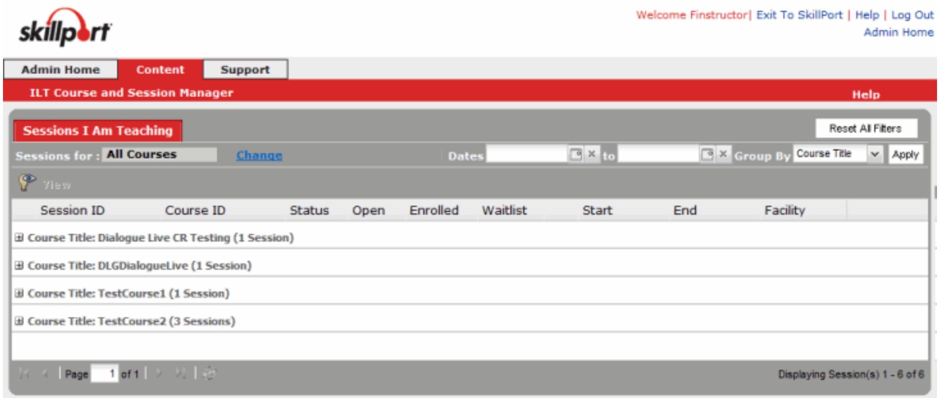
Sessions I am Teaching

As an instructor, you can manage many of the details related to the ILT sessions you deliver. You can view a list of sessions you are teaching, including session number, status, type, catalog number and title, and also manage the session roster.

To view the session information

1. Log in to Skillport as an Instructor and navigate to the Admin area.

2. Click **Content > ILT > Sessions I Am Teaching**. The **Sessions I Am Teaching** page displays:



3. Select the session you want to view. The session details display.

4. Click **Cancel** to return to Skillport.

You can click a session ID to view session details on your upcoming sessions, edit session information, and, once completed, input student progress results.

When you are assigned a session to teach, you will receive an email notification with the session details, or if a session you are teaching is canceled, you will receive an email notification of the cancelation.

Manage Enrollments

Enroll Learners in a Session

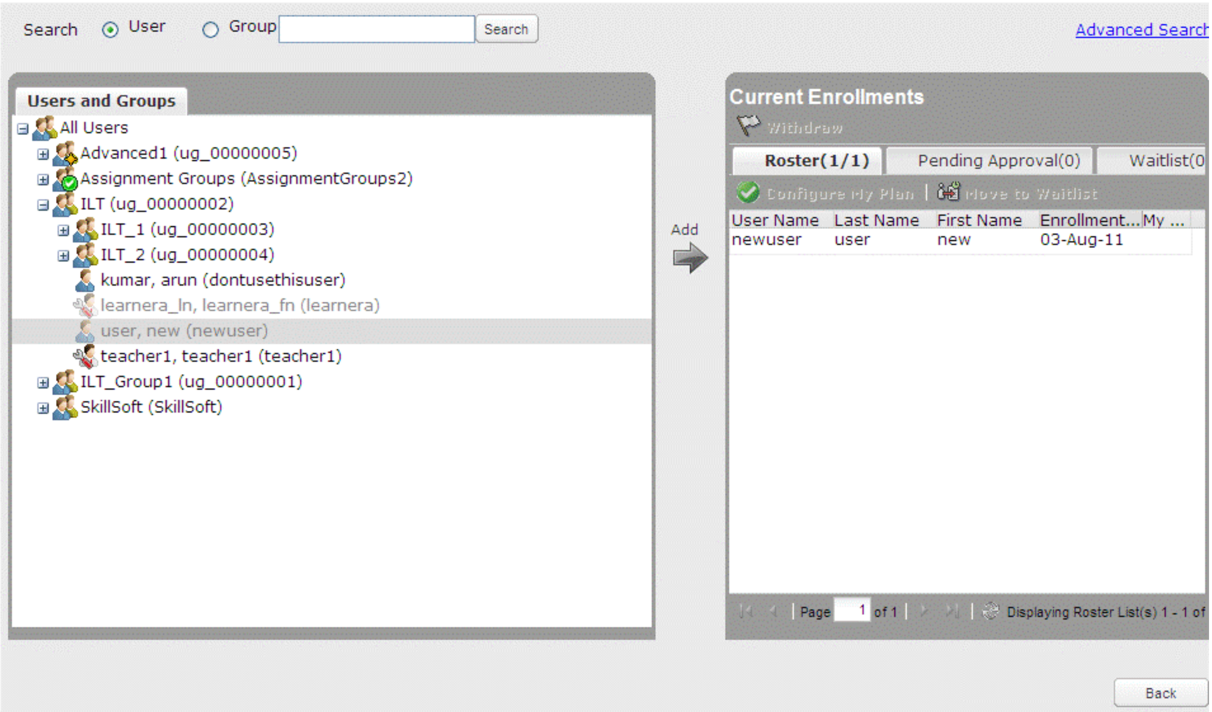
An Instructor has to be assigned to the specific session in order to enroll learners into a session.

To enroll learners manually in a session

1. Click **Content** > **ILT** > **Course and Session Manager**.
2. Click the **Session Manager** tab.
3. Click the **Session ID** you wish to view.

   The **View Session** window displays.
4. Click **Manage Enrollments**.

   The following screen displays:



5. Find the user or group you wish to assign to the session by using the search or find the user name or group name on the list.

   The Search Bar is available on top of the screen, allowing you to search for a user or group in basic and advanced modes. The Search fields in Advanced mode for users are:

   - Group
   - Email
   - User Name
   - Last Name
   - First Name

- City
- State
- Include Ineligible to Enroll

The Search fields in Advanced mode for groups are:

- Group Name
- Org Code

The Users and Groups pane refreshes to show the search results.

6. Once you have found the user or group that you require, select it and click **Add** to add to the current enrollments.

   The user or group will be added to the Roster of that session.

Withdraw Learners from a Session
The following are the procedures followed to withdraw a learner from a session.

To withdraw learners manually when managing enrollments

1. Click **Content** > **ILT** > **Course and Session Manager**.
2. Click the **Session Manager** tab.
3. Click the **Session ID** you wish to view.

   The **View Session** window displays.
4. Click **Manage Enrollments**.
5. Click the name of the learner in the roster found in the right hand window pane that you want to withdraw.
6. Click **Withdraw**.
7. The learner is withdrawn from the session.

To withdraw learners directly from the roster

1. Click **Content** > **ILT** > **Course and Session Manager**.
2. Click the **Session Manager** tab.
3. Click the **Session ID** you want to view.

   The **View Session** window displays.
4. Click the **Roster** tab.

   The list of learners enrolled in the session displays.
5. Click the **Withdraw learner** button next to the learner you want to withdraw.
6. Click **Yes** in the confirmation message that displays.

7. The learner is removed from the roster of the session.

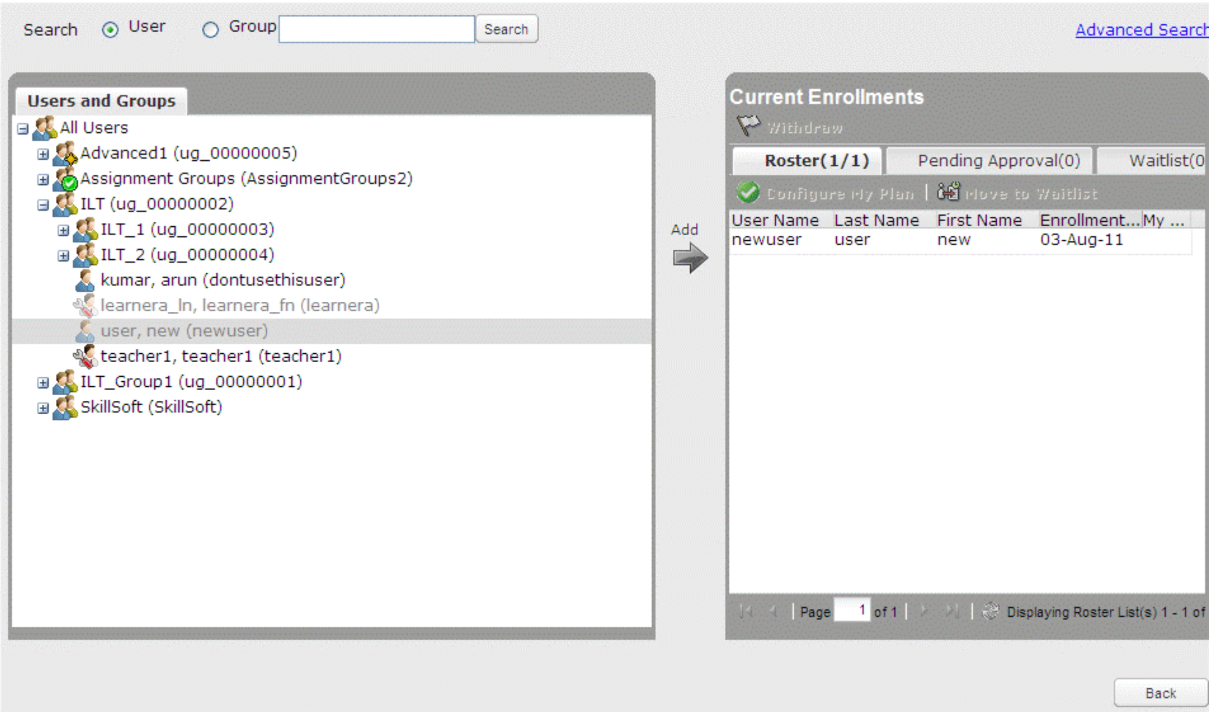
Moving Learners to the Waitlist
The following is the procedure followed to move a learner to the waitlist.

To move a learner to the waitlist

1. Click **Content** > **ILT** > **Course and Session Manager**.
2. Click the **Session Manager** tab.
3. Click the **Session ID** you wish to view.

   The **View Session** window displays.
4. Click **Manage Enrollments**.

   The following screen displays:



5. Click the name of the learner in the roster and click **Move to Waitlist**.

View Attendance

To view attendance of Learners in a session

1. Click **Content** > **ILT** > **Course and Session Manager**.
2. Click the **Session Manager** tab.

3. Click the **Session ID** you wish to view.

   The **View Session** window displays.

4. Click the **Roster** tab.

   The list of learners enrolled in the session appears.

5. Click **Attendance Sheet**.

   The attendance sheet opens in a new window. This sheet contains the following details:

   - **Instructor**: Name of the Instructor.
   - **Session ID**: ID of the session that the Learner has enrolled for.
   - **Course ID**: ID of the course which contains the session.
   - **Title**: Title of the session.
   - **Facility**: Facility which the session is conducted in.
   - **Classroom**: Classroom which the session is conducted in.
   - **Start**: Date and time that the session starts.
   - **End**: Date and time that the session ends.
   - **Name**: Name of the Learner.
   - **User Name**: User name of the Learner
   - **Email**: Email address of the Learner
   - **Student Signature**: Space for signature of the student.

6. Click **Print** to print out the attendance sheet, or click **Close** to close the window.

Entering Results

When the scheduled session is complete, you can enter results for enrolled learners.

An ILT Course is considered a Completion for a learner when both of the following conditions are met:

- the learner's session record has a **Passed** value of **Yes**, AND
- the session has been marked as Completed

A learner’s **Actual Duration** gets its value from the parent ILT Course record’s **Duration** value. The **Actual Duration** value is populated when the learner has completed an ILT Session for that ILT Course.

Note: The results can only be modified after the session is marked complete. A Learner's results appear in a Learner's My Report.

To enter results for a Learner in a session

1. Click **Content** > **ILT** > **Sessions I am Teaching**.

2. Click the **Session ID** you wish to view.

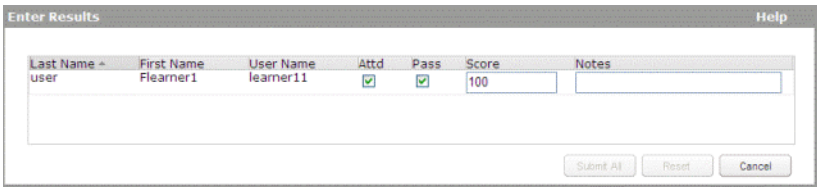
   The **View Session** window displays.

3. Click the **Roster** tab.

   The list of learners enrolled in the session displays.

4. Click the **Enter Results** button.

   The following screen displays.



5. Click the relevant check boxes and enter details for the following fields:

   - Attd (Attended)
   - Pass
   - Score
   - Notes

6. Click **Submit All** to save the changes and enter the results. **Reset** clears all changes made.

Quiz Results

The quiz results can be viewed in this section. The average score can be imported and the quiz results can be exported from this page.

To view quiz results for a Learner in a session

1. Click **Content** > **ILT** > **Course and Session Manager**.

2. Click the **Session Manager** tab.

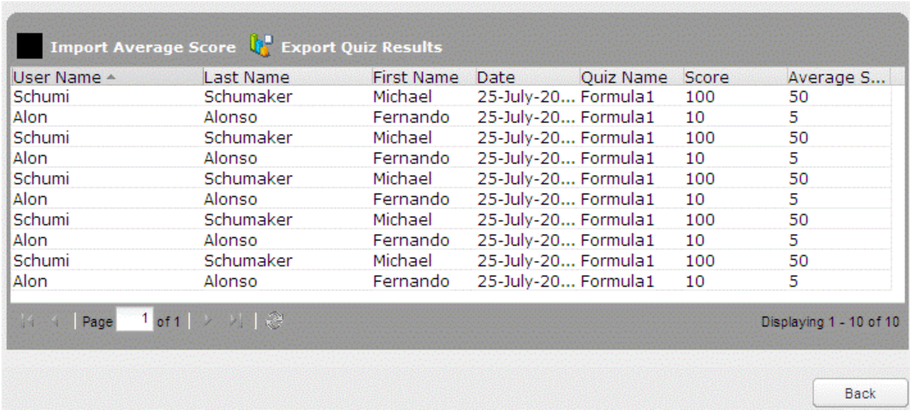
3. Click the **Session ID** you wish to view.

   The **View Session** window displays.

4. Click the **Roster** tab.

   The list of Learners enrolled in the session displays.

5. Click the **Quiz Results** button. The following screen displays.



User Name	Last Name	First Name	Date	Quiz Name	Score	Average S...
Schumi	Schumaker	Michael	25-July-20...	Formula1	100	50
Alon	Alonso	Fernando	25-July-20...	Formula1	10	5
Schumi	Schumaker	Michael	25-July-20...	Formula1	100	50
Alon	Alonso	Fernando	25-July-20...	Formula1	10	5
Schumi	Schumaker	Michael	25-July-20...	Formula1	100	50
Alon	Alonso	Fernando	25-July-20...	Formula1	10	5
Schumi	Schumaker	Michael	25-July-20...	Formula1	100	50
Alon	Alonso	Fernando	25-July-20...	Formula1	10	5
Schumi	Schumaker	Michael	25-July-20...	Formula1	100	50
Alon	Alonso	Fernando	25-July-20...	Formula1	10	5

Skillsoft Advantage

About Skillsoft Advantage Content

In order for your learners to access Skillsoft Advantage content from Skillport, you must entitle it to them in Skillport Administrator. Entitling content allows learners to access content items, as well as view them in Skillport. A content item that is not entitled to a user either explicitly or through inheritance, will not appear in Skillport Learner.

You can entitle Skillsoft Advantage content to your learners at the track level, at the content item level, or both.

Note: All book and video content must be entitled to the learner through the appropriate Books24x7 Collection. Once a collection is entitled, the book and video content items will be available from within the learning track, and from outside the learning track.

Entitling at the Track Level

Entitling Skillsoft Advantage content at the track level allows learners to access the track and all content items within the track. With this option, only the learning tracks will appear in Skillport Learner. Individual content items will only be available from within the track and will not appear in Skillport Learner.

If you want your learners to access the learning tracks from the Skillsoft Advantage Home page, you must entitle them to the Home page in addition to the tracks.

This option is useful if you want your learners to access all tracks from the home page of a Skillsoft Advantage product.

The following image depicts the appearance of a Home page and it's associated learning tracks within the Catalog Assigner.

1. Skillsoft Leadership Advantage 2.0 Home page.
2. Leadership Advantage 2.0 learning tracks.

Entitling at the Track and Content Item Level

Entitling content at the track level, and at the content item level, allows learners to access the item from within the track or from outside the track. With this option, the learning tracks and the individual items will appear in Skillport Learner.

This option is useful if you want your learners to access a few tracks in their entirety, and specific content items from other tracks in Skillport.

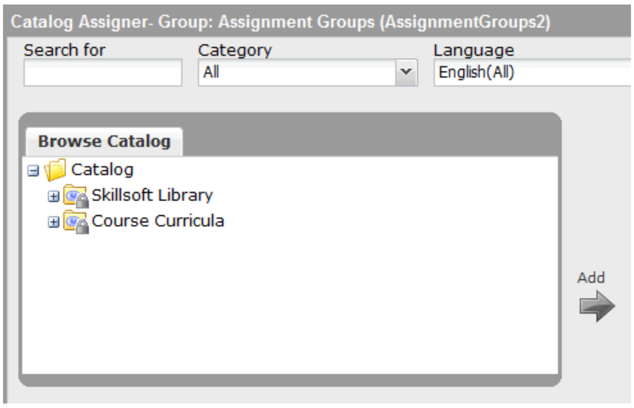
For more information about entitling content, see Working with Entitlements.

Entitling Skillsoft Advantage Content

Skillsoft Advantage content is entitled to learners through the Catalog Assignment tab within the User Management Administrator page.

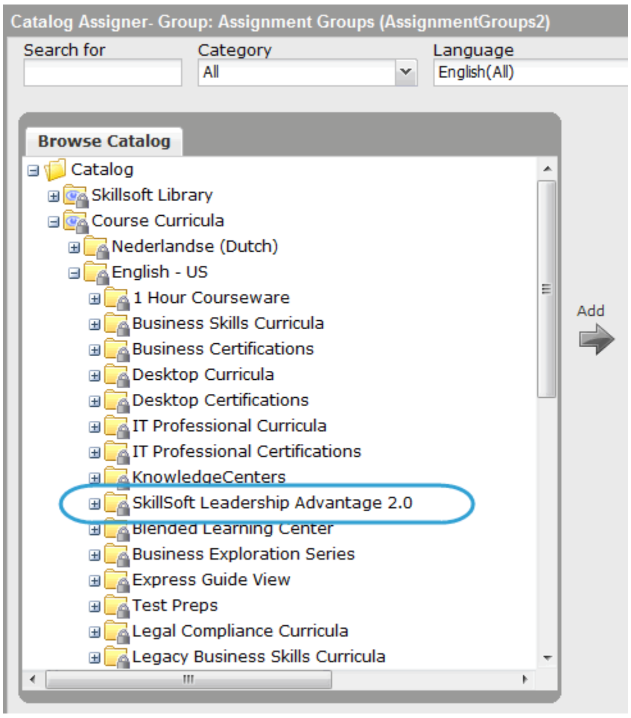
There are three ways to locate and entitle Skillsoft Advantage content in the Catalog Assigner window.

- From the Course Curricula folder. (Recommended)
  - Groups content by content type
  - Provides easy access to all related tracks and associated content items
- From the Skillsoft Library folder.
  - Groups content by subject matter
- With the Search feature.
  - Allows you to search for specific tracks or content items by content type and subject matter



Entitling Content from the Course Curricula Folder

The Course Curricula folder groups content together according to content type. For instance, all Skillsoft Leadership Advantage 2.0 tracks and associated content items are listed under the **Skillsoft Leadership Advantage 2.0** folder.

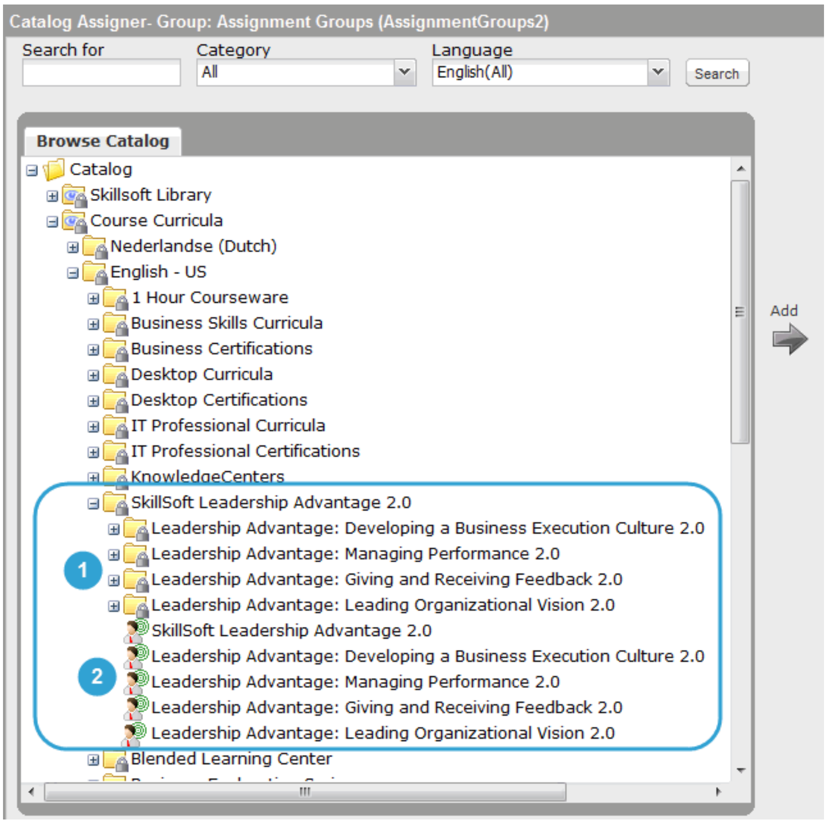


Expanding the Skillsoft Leadership Advantage 2.0 folder displays:

1. All folders that contain content items for individual tracks.

2. The Leadership Advantage 2.0 Home page and the Leadership Advantage 2.0 learning tracks.

From this view, you can select one or more tracks, and you can select the folders which contain the learning track content items.



To provide learners access to the learning tracks form the Leadership Advantage 2.0 Home page

1. On the navigation bar, click **Users & Groups > User Management**.
2. In the left panel, select the **group** or **user** to which you want to entitle content.
3. In the right panel, click the **Catalog Assignment** tab.
4. Click **Edit Group** or **Individual Assignments**.
5. Under the **Course Curricula** folder, select **Skillsoft Leadership Advantage 2.0.**
6. Select the desired tracks.
7. Click **Add**, or drag the content to the right pane and drop it into the Catalog Assignment folder.

Important Notes:

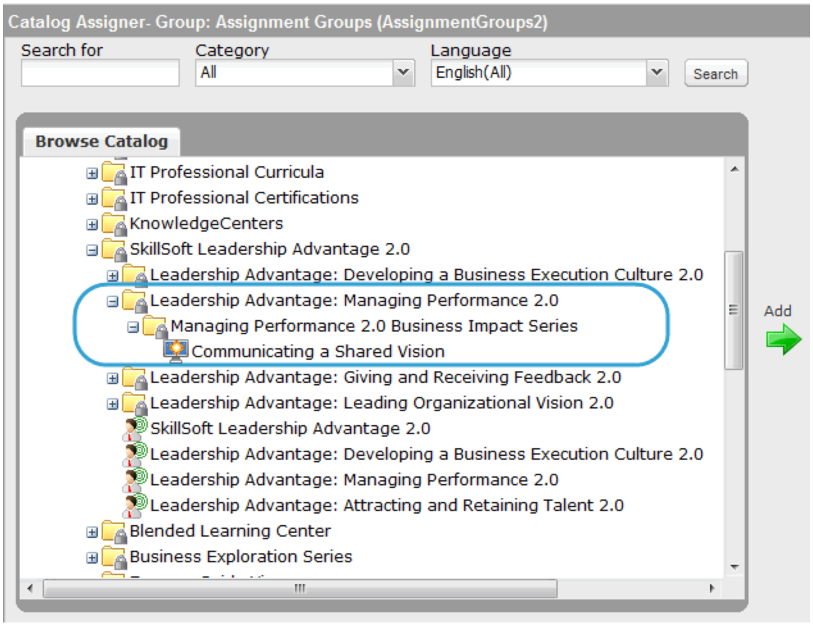
- Entitling the Home page does not entitle the learning tracks. Each learning track must also be entitled to the learner.
- Entitling the learning track does not provide the learner with access to content from outside the learning track. You must entitle the learner to the individual content items.

To provide learners access to Skillsoft Leadership Advantage 2.0 content items from outside the learning tracks

1. After step 5 above, select the folder that contains the content items associated with the specific learning track.
2. Click **Add**, or drag the content to the right pane and drop it into the Catalog Assignment folder.

Note: Selecting an entire folder makes all content items within the folder accessible from Skillsoft Advantage and Skillport Learner.

Optionally, you can expand the folder containing the content items and select individual items.



Entitling Content from the Skillsoft Library

You can entitle Skillsoft Advantage content from the Skillsoft Library by locating and selecting the entire library, individual library folders, individual tracks, or individual content items and then adding them to the Catalog Assignment folder.

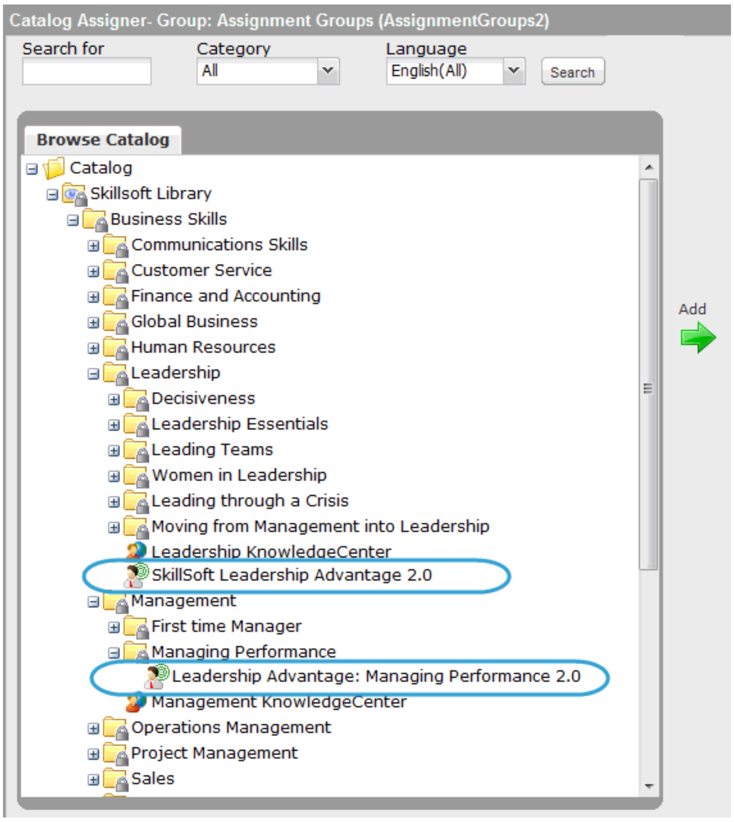
If you would like to entitle the Skillsoft Library to all or many learners, but entitle Skillsoft Advantage only to a few learners, you can create a custom library by copying the Skillsoft Library and removing the Skillsoft Advantage content. You can then entitle the custom library by following the steps below, and entitle the Skillsoft Advantage content from the Course Curricula folder.

Note: When you create a custom library, you must designate the library's browse view in order for your learners to view it from their Browse view.

To entitle content from the Skillsoft Library

1. On the navigation bar, click **Users & Groups > User Management**.
2. In the left panel, select the **group** or **user** to which you want to entitle content.
3. In the right panel, click the **Catalog Assignment** tab.
4. Click **Edit Group** or **Individual Assignments**.
5. In the Browse Catalog tab, select the **Skillsoft Library** folder.
6. Click **Add**, or drag the folder to the right pane and drop it into the Catalog Assignment folder.

   Optionally, you can expand the Skillsoft Library folder and select individual folders.



Entitling Content with the Search Feature

The Search feature allows you to search for Skillsoft Advantage tracks using the keyword "leadership", "sales", or "professional", with the Category filter set to Skillsoft Advantage. This option is convenient when you want to entitle your learners to a Skillsoft Advantage Home page and any related learning tracks. To locate individual content items, use the Course Curricula folder.

To entitle content with the Search feature

1. On the navigation bar, click **Users & Groups > User Management**.
2. In the left panel, select the **group** or **user** to which you want to entitle content.
3. In the right panel, click the **Catalog Assignment** tab.

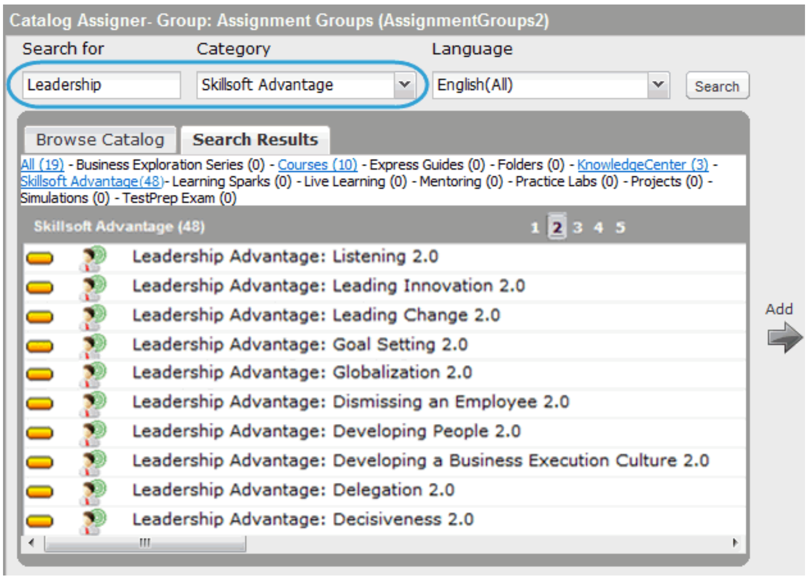
4. Click **Edit Group** or **Individual Assignments**.

5. In the **Search for** field, enter the subject matter for the desired Skillsoft Advantage product, such as "Leadership."

6. With the **Category** drop down, select **Skillsoft Advantage** in order to refine the search results.

7. In the search results, select the desired content.

8. Click **Add**, or drag the content to the right pane and drop it into the Catalog Assignment folder.



For more information about entitling content, see Working with Entitlements.

Keywords

Understanding Keywords

A *keyword* is a word or phrase that you can link to an asset, for example, a course or a book. If the search phrase that you enter includes that word or phrase, the linked asset is returned in the search results.

Keywords allow you to associate assets with specific identifiers, such as corporate buzzwords, job titles, skill classification descriptors, and common misspellings. This makes it easier for learners and administrators to search for and find relevant instructional material.

A keyword can be associated with one or more assets, and an asset can have one or more associated keywords.

Asset Searches Using Keywords

Users can use keyword searches to search for associated assets anywhere that asset searches are possible, for example, using SEARCH&LEARN in Skillport or using the search fields in the Catalog Assigner in the Skillport Administrator.

When you use a wild card in a search expression, the assets associated with all applicable keywords are returned. For example, if you enter `program*`, then the assets linked to all keywords beginning with "program," such as "programming" and "programmer," are returned.

Note: You can only use a wild card at the end of a search term.

Support for Multiple Languages

You can define keywords in any language that is supported by the Unicode character set. For example, you can create an English keyword for a Chinese asset, and vice versa.

Invisible Keywords

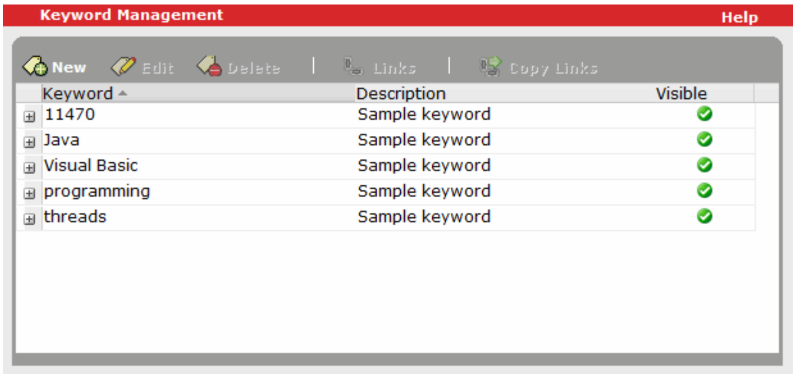
Keywords can be visible or invisible to learners. If they are visible, learners can see them on the summary pages of assets. If they are invisible, learners cannot see them. Invisible keywords can be useful in cases such as common misspellings.

Company Administrators can still see any keywords in the Learner UI that are invisible. However, these keywords are not visible to learners, managers, or administrators.

View Existing Keywords

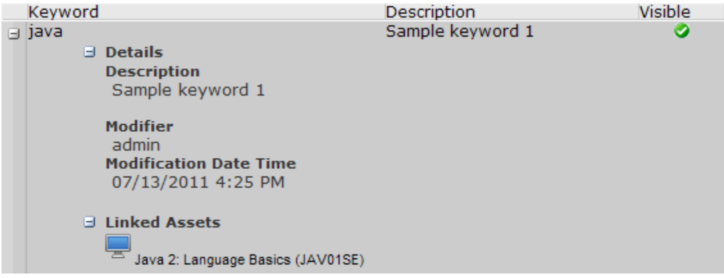
To view existing keywords

- Click **Content > Keywords** on the navigation bar.



By default, keywords are sorted numerically, then alphabetically by capitalized keyword, and finally alphabetically by lowercase keyword.

To change the sort order of a column, click the column header. To view the details of a keyword and its linked assets, expand the + (plus) sign beside that keyword.



To display assets for a keyword that has 10 or more assets linked to it, click **View More**.

Create a Keyword

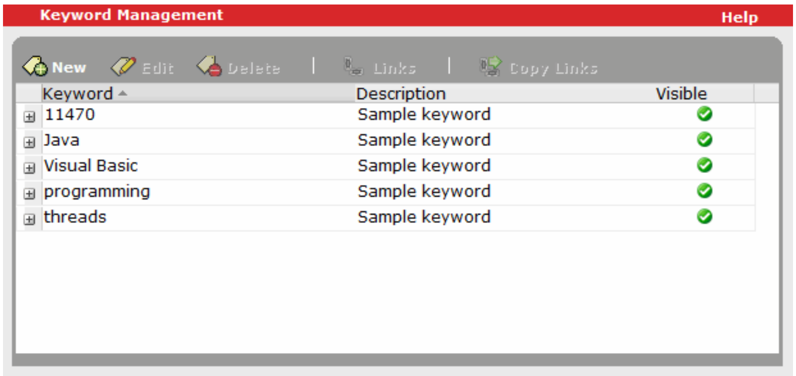
A *keyword* is a word or phrase that you can link to an asset, for example, a course or a book. If the search phrase that you enter includes that word or phrase, the linked asset is returned in the search results.

Keywords allow you to associate assets with specific identifiers, such as corporate buzzwords, job titles, skill classification descriptors, and common misspellings. This makes it easier for learners and administrators to search for and find relevant instructional material.

Note: You can create a maximum of 150 keywords.

To create a keyword

1. Click **Content > Keywords** on the navigation bar.



2. On the Keyword Management page, click **New**.

3. Enter the desired keyword information:

   - **Keyword**: (Required) The word or phrase. You can enter a maximum of 64 characters. All keywords must be unique, and the following characters are supported:

     - The space character (used to separate words in a phrase)

     - Any letter in any language

     - Any number in any language

     - Any currency character

     - Any of the following ASCII graphical characters (which are used like a letter or number in a tag): # % + - . / : @ ^ _ $,

     (number sign, percent sign, plus sign, hyphen (minus), full stop (period, dot, decimal point), solidus (slash), colon, at sign, circumflex accent, underscore, dollar sign)

   - **Visible**:

     If you select this option, the keyword is visible to all users, and displays in search results and on the summary pages of the assets to which it is linked.

     If you clear this option, the keyword is visible *only* to company administrators in search results and on the Details page, and is displayed in italics to indicate that it is not visible to other users. The keyword will not be visible to learners, managers, or administrators.

     Note: If entering a keyword as a corrective measure (for example, using a commonly misspelled word, such as "customre" instead of "customer", to display intended results), you can leave this option cleared so the misspelled word does not display for learners, managers, or administrators in the user interface.

   - **Description**: A phrase describing the keyword or the reason for its use. You can enter a maximum of 256 characters.

4. Click **Save**.

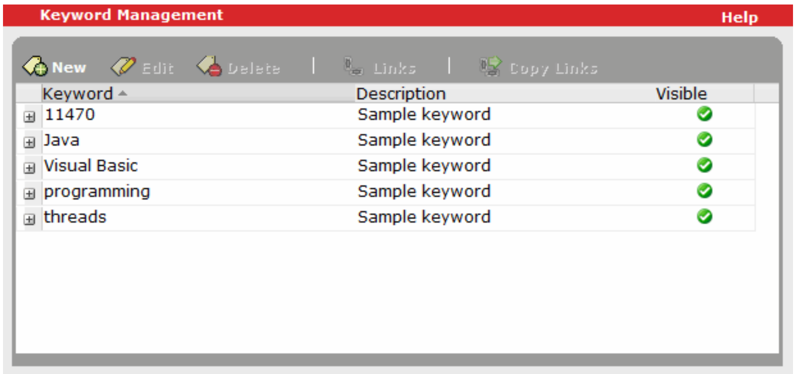
   You can now link the keyword to assets so that they can be used in searches for assets.

Link a Keyword to Assets

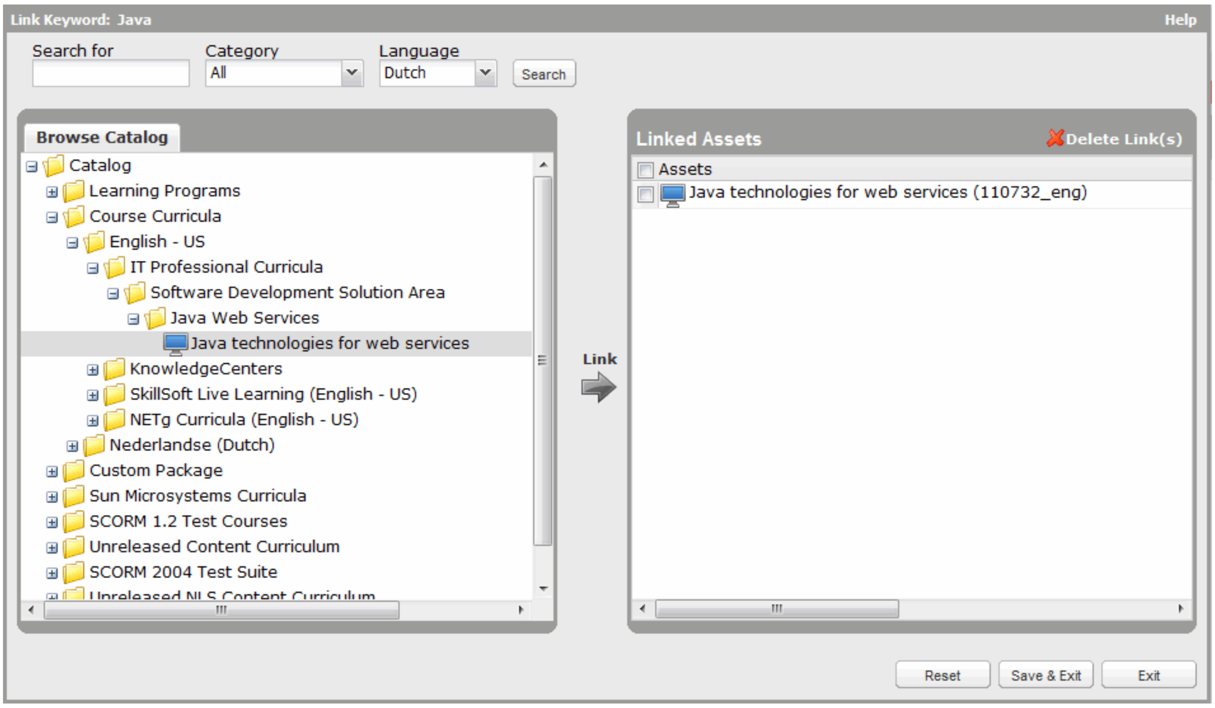
You can link a keyword to any asset for which you can browse or search, for example, courses, books, and SkillBriefs.

To link a keyword to assets

1. Click **Content > Keywords** on the navigation bar.



2. Select the keyword, and click **Links**.



3. In the Browse Catalog pane, locate the asset to which you want to link the keyword. You can do this in 2 ways:

   - Browse the Catalog by navigating through its structure.

   - Search for the asset using the search fields at the top of the page. For detailed information on the search tool, including tips on creating search expressions, see ***Search for Assets and Folders*** on page 14.

4. In the left pane, select the asset.

Note: You can also select a folder in the Catalog. If you do this, all assets currently in the folder and its subfolders will be linked to the keyword. Since linking a large number of assets can be time-consuming, if you select a folder that contains more than 25 assets, you will be prompted to confirm the action.

In addition, be aware that if the contents of a folder subsequently change, there is no effect on any asset's keywords. You must manually link or unlink assets as needed.

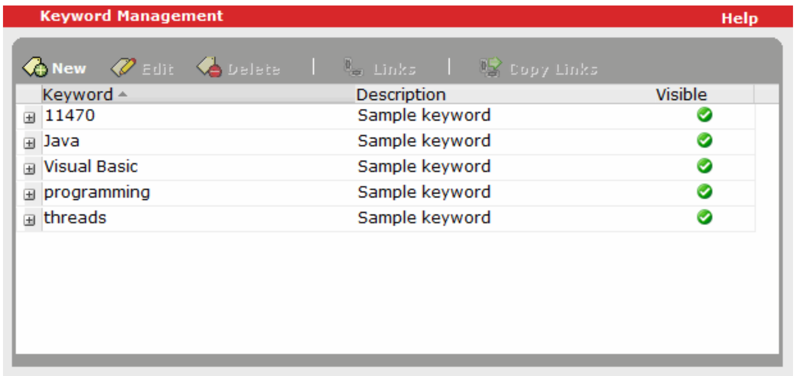
5. Click **Link**. Or, you can drag and drop the asset into the right pane.
6. Repeat steps 3 through 5 as needed.
7. Click **Save & Exit**.

Note: There may be a short delay before your changes affect Catalog searches while the database is updated accordingly. Links to books can require the most time (typically, a maximum of 5 minutes) to be applied and begin working in searches.

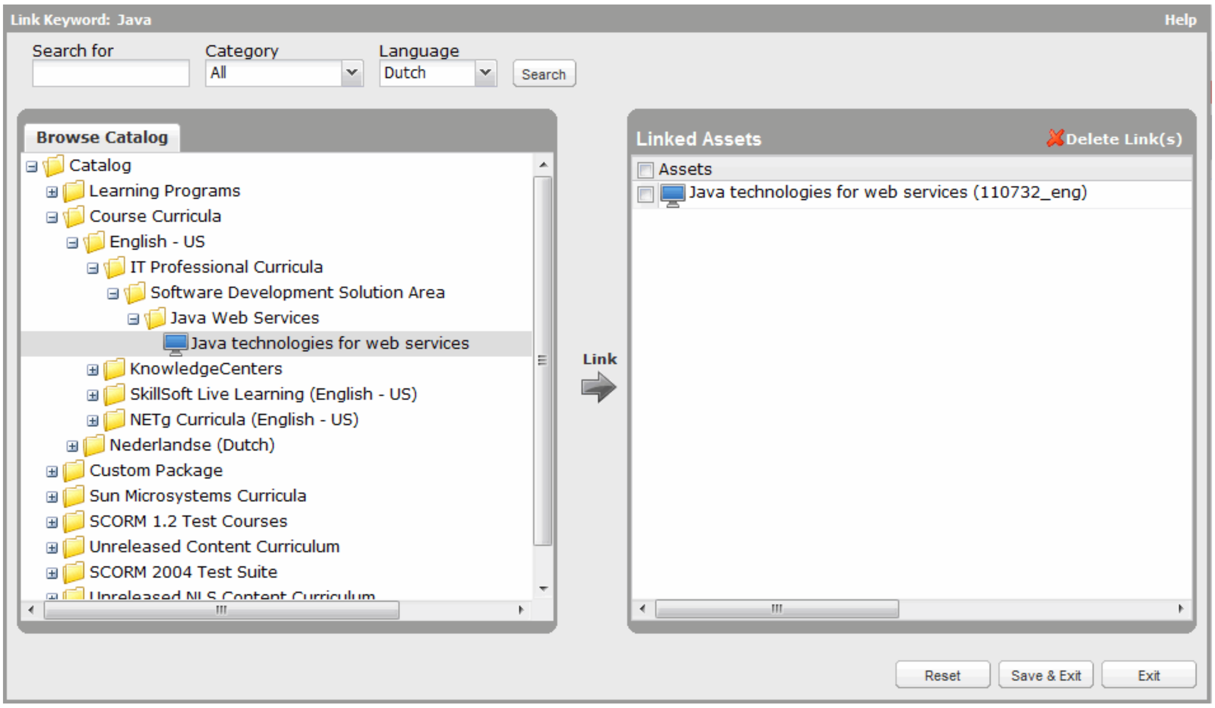
Unlink Assets from a Keyword

To unlink assets from a keyword

1. Click **Content > Keywords** on the navigation bar.



2. Select the keyword, and click **Links**.



3. In the Linked Assets pane:

   a. Select the asset to remove. To select multiple assets, use **Shift**+click or **Ctrl**+click.

   b. Click **Delete Link(s)**.

4. Click **Save & Exit**.

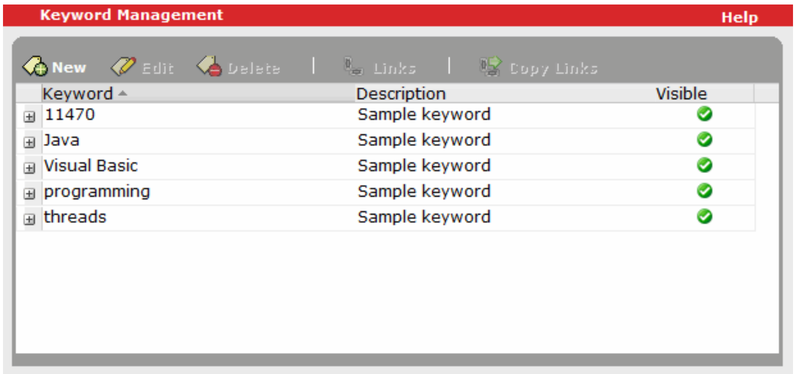
Note that there may be a short delay before your changes affect Catalog searches while the database is updated accordingly.

Copy a Keyword's Linked Assets

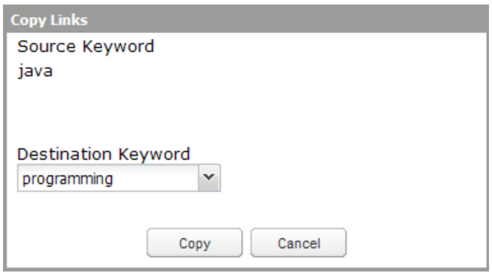
As a convenience feature, you can copy one keyword's linked assets to another keyword. This allows you to quickly link a large number of assets to a keyword by 1) performing the copy and then 2) adding or removing individual assets as appropriate.

To copy a keyword's linked assets

1. Click **Content > Keywords** on the navigation bar.



2. Select the asset that has the linked assets that you want to copy, and click **Copy Links**.



3. In **Destination Keyword**, select the keyword to which you want to copy the linked assets.

4. Click **Copy**, and then click **OK**.

   The linked assets are copied to the destination keyword. Note that there may be a short delay before your changes affect Catalog searches while the database is updated accordingly.

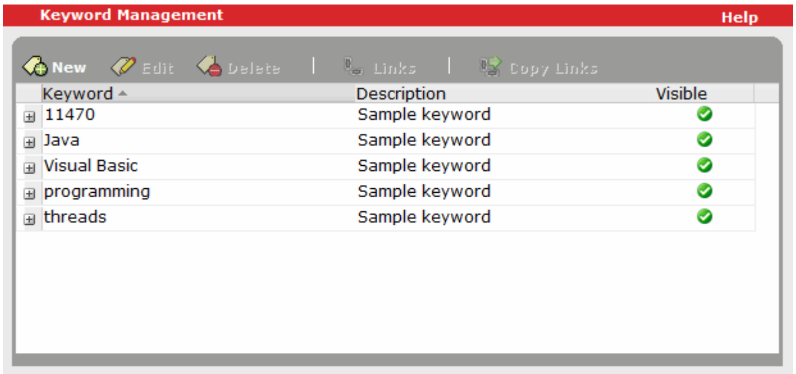
5. If desired, add or remove individual linked assets as appropriate.

Edit a Keyword

You can edit all aspects of a keyword. However, be aware that changing the name can be a process-intensive operation because it requires all linked assets to be updated accordingly.

To edit a keyword

1. Click **Content > Keywords** on the navigation bar.



2. Select the keyword that you want to edit, and click **Edit**.

3. In the Edit Keyword dialog box, change the keyword's information as needed:

   - **Keyword**: (Required) The word or phrase. You can enter a maximum of 64 characters. All keywords must be unique, and the following characters are supported:

     - The space character (used to separate words in a phrase)

     - Any letter in any language

     - Any number in any language

     - Any currency character

     - Any of the following ASCII graphical characters (which are used like a letter or number in a tag): # % + - . / : @ ^ _ $,

     (number sign, percent sign, plus sign, hyphen (minus), full stop (period, dot, decimal point), solidus (slash), colon, at sign, circumflex accent, underscore, dollar sign)

   - **Visible**:

     If you select this option, the keyword is visible to all users, and displays in search results and on the summary pages of the assets to which it is linked.

     If you clear this option, the keyword is visible *only* to company administrators in search results and on the Details page, and is displayed in italics to indicate that it is not visible to other users. The keyword will not be visible to learners, managers, or administrators.

     Note: If entering a keyword as a corrective measure (for example, using a commonly misspelled word, such as "customre" instead of "customer", to display intended results), you can leave this option cleared so the misspelled word does not display for learners, managers, or administrators in the user interface.

   - **Description**: A phrase describing the keyword or the reason for its use. You can enter a maximum of 256 characters.

4. Click **Save**.

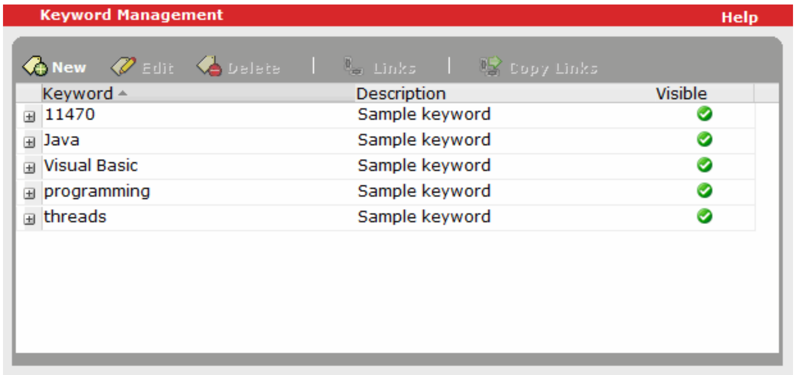
Note that there may be a short delay before your changes affect Catalog searches while the database is updated accordingly.

Delete a Keyword

You can delete a keyword at any time, which also removes it from all linked assets. Deleting a keyword has no impact on an asset itself.

To delete a keyword

1. Click **Content > Keywords** on the navigation bar.

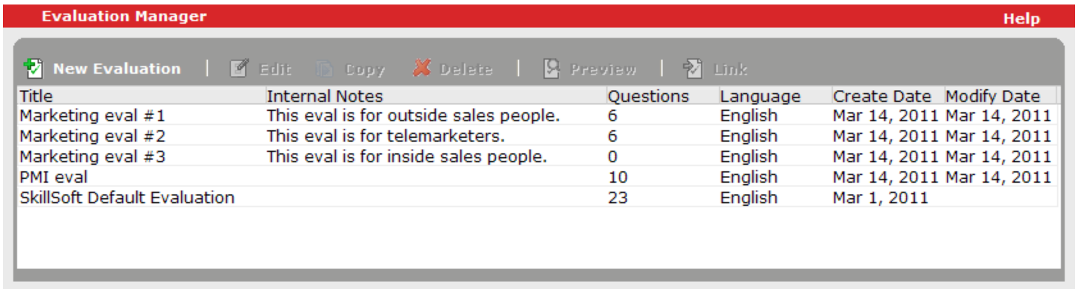


2. Select the keyword you want to delete.
3. Click **Delete**, and then click **OK**.

Evaluations

You can create evaluations to gather information about completable learning assets and to allow users to provide feedback on their learning experiences. The evaluations can be linked to any asset with completion criteria. Skillport includes a standard default evaluation containing 23 questions to get you started. You can use some or all of these questions, or create your own custom evaluation.

To access the Evaluation Manager, click **Content > Evaluations** on the navigation bar. The Evaluation Manager shows the existing evaluations listed in alphabetical order.



Company administrators, administrators, and managers can run Evaluation reports.

Skillsoft Default Evaluation

To aid you in creating your own evaluations, Skillport includes a sample evaluation named "Skillsoft Default Evaluation." This evaluation comes with 23 standard questions. You can quickly copy this evaluation and then customize the copy as needed.

Before you begin creating custom evaluations, Skillsoft recommends that you preview the Skillsoft Default Evaluation in order to view its contents. For step-by-step information on how to preview an evaluation, see ***Preview an Evaluation*** on page 352.

Create an Evaluation

You can create an evaluation from scratch. However, if an existing evaluation closely resembles the desired new result, you can copy the existing evaluation instead and then modify its contents as needed. For more information, see ***Copy an Evaluation*** on page 354.

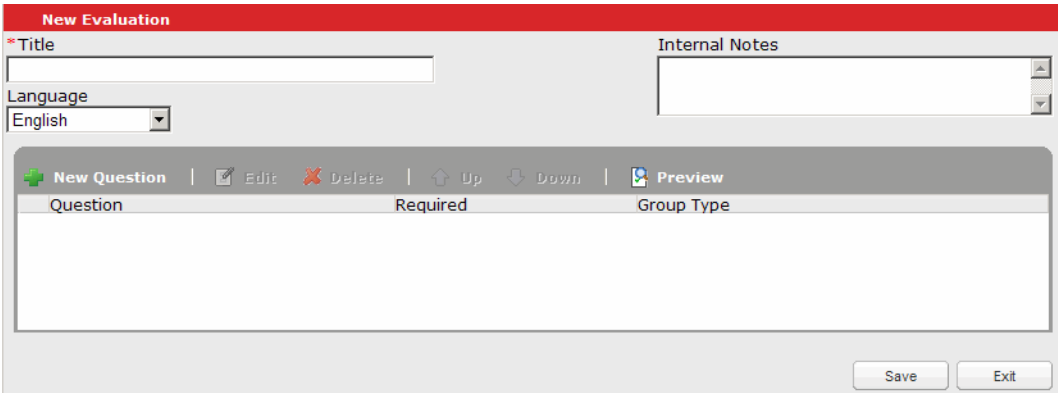
To create an evaluation

1. Click **Content > Evaluations** on the navigation bar.

   The Evaluation Manager appears.

2. Click **New Evaluation**.

The New Evaluation page appears.

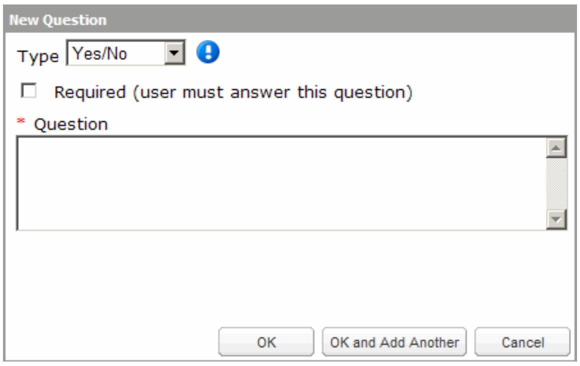


3. Enter the information for the evaluation:

Field	Description
Title	(Required) Enter a title for the evaluation. The maximum length is 255 characters.
Internal Notes	Enter any internal information for the administrator. This text is not visible to the user. The maximum length is 4,000 characters.
Language	Select the language to display the evaluation in to users.

4. Click **New Question**.

   The New Question dialog box appears.



5. In **Type**, select the question type from the drop-down list.

   Valid options are **Yes/No**, **Likert Scale**, **Drop Down**, and **Text Entry**. The fields in which you enter question information vary depending on which type of question you select from the drop-down list.

   - Maximum question length is 500 characters.
   - Maximum response to a text-type question is 4000 characters.

6. Select **Required** to specify that the question is mandatory.

7. Enter the question text into the form, and then click the appropriate next step:

   - **OK**: Enters the question and returns you to the New Evaluation screen.

- **OK and Add Another**: Enters the question and displays the new question form for your next entry.
- **Cancel**: Closes the new question form and returns you to the New Evaluation screen.

Note: While creating your evaluation, you can click **Preview** to preview exactly how it will appear to users. After previewing, you can use the menu options to edit, remove, or rearrange questions by moving them up or down in the list.

8. Click **Save** to save the evaluation.
9. Click **Exit** to return to the Evaluation Manager.

   The new evaluation now appears in the list in the Evaluation Manager.
10. Link the evaluation to one or more learning assets.

Preview an Evaluation

You can preview evaluations while you are creating them or after they have been saved. Previewing an evaluation allows you to ensure the content is arranged in a logical order, to experience the user perspective, and to test for accuracy.

To preview an evaluation during creation

1. Begin to create, copy, or edit an evaluation so that it is open for changes.

   At any point after questions have been entered, click **Preview** to display the evaluation.
2. After previewing the evaluation, do one of the following:
   - Click **Print** to print the evaluation.
   - Click **Close Preview** to return to the Evaluation Manager page.

   If desired, you can edit, delete, or reorder questions, then preview the evaluation again.
3. Do one of the following:
   - Click **Save** to save any changes.
   - Click **Exit** to return to the Evaluation Manager page.

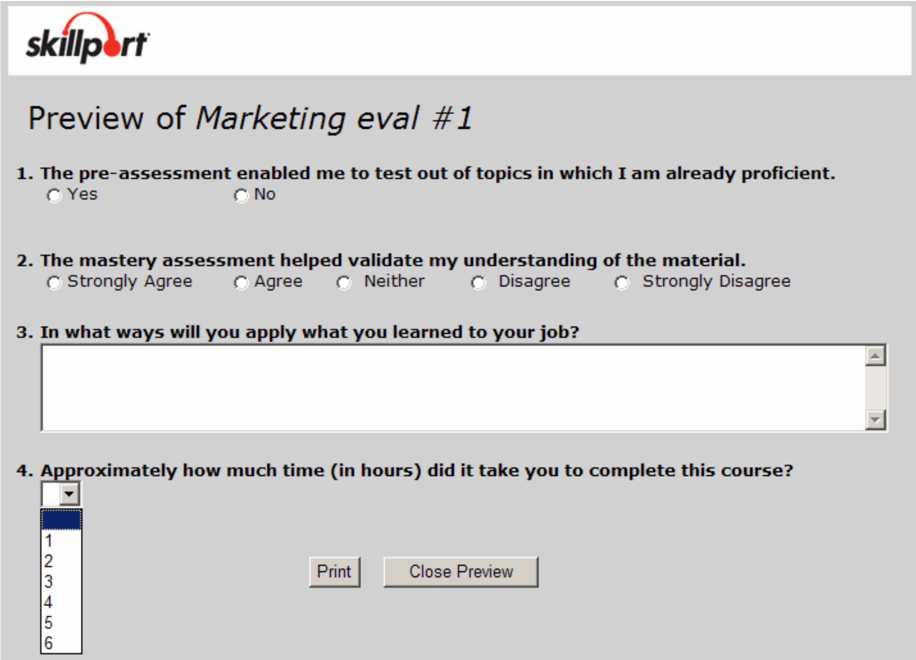
To preview an evaluation after it has been saved

i. Click **Content > Evaluations** on the navigation bar.

The Evaluation Manager page appears.

ii. Select an evaluation from the list, and click **Preview**.

The evaluation opens, showing all questions in the order they will appear in the evaluation. The example below shows the four possible question types: **Yes/No**, **Likert Scale**, **Text Entry**, and **Drop Down**.



iii. After previewing the evaluation, do one of the following:

- Click **Print** to print the evaluation.
- Click **Close Preview** to return to the Evaluation Manager page.

Edit an Evaluation

You can edit an evaluation while creating it or after it has been saved. You can reword questions, add or delete questions, or change the order that the questions display.

If an evaluation has already been submitted by at least one user, you can only edit certain items:

Allowed	Not Allowed
▪ Changing the title, internal notes, or language ▪ Reordering questions ▪ Changing a question's text	▪ Adding or removing questions ▪ Changing a question's type ▪ Changing the values in a drop-down question

To edit an evaluation

1. Click **Content > Evaluations** on the navigation bar.

   The Evaluation Manager page appears.
2. Select an evaluation from the list.
3. Click **Edit.**

   The selected evaluation opens.

4. Select a question from the list.
5. Click **Edit**.

   The **Edit Question** window appears.
6. Edit the desired sections.
7. Click **OK** to save the edits.
8. On the Edit Evaluation page, click **Save**, then click **OK**.
9. Click **Exit**.

Copy an Evaluation

Many evaluations will reuse questions from other evaluations. Rather than creating each evaluation from scratch, you can customize existing evaluations by copying, modifying, and renaming them, saving time and retaining consistency throughout your evaluations.

To copy an evaluation

1. Click **Content > Evaluations** on the navigation bar.

   The Evaluation Manager page appears.
2. Select an evaluation from the list.
3. Click **Copy**.

   The Copy Evaluation window appears. By default, the **Title** displays as **Copy of <selected evaluation name>**.
4. Enter the following information:

Field	Description
Title	(Required) Enter a title for the evaluation. The maximum length is 255 characters.
Internal Notes	Enter any internal information for the administrator. This text is not visible to the user. The maximum length is 4,000 characters.
Language	Select the language to display the evaluation in to users.

5. If desired, edit or reorder the questions in the evaluation:
   - Edit the individual questions in the evaluation.
   - Reorder the questions by dragging them into the desired order.
6. Click **Save**.

   A message appears stating the evaluation has been successfully saved.
7. Click **Exit**.

   The new evaluation displays in the list on the Evaluation Manager page.
8. Link the evaluation to one or more learning assets.

Link an Evaluation to Learning Assets

You must link an evaluation to learning content so that it is available to users. You can link an evaluation to the following types of content:

- Courses
- Live Learning courses (LLCs)
- Instructor Led Training (ILT) courses
- Learning programs
- KnowledgeCenters
- Business Exploration Series assets
- Skillsoft Advantage assets
- External learning objects (ELOs)

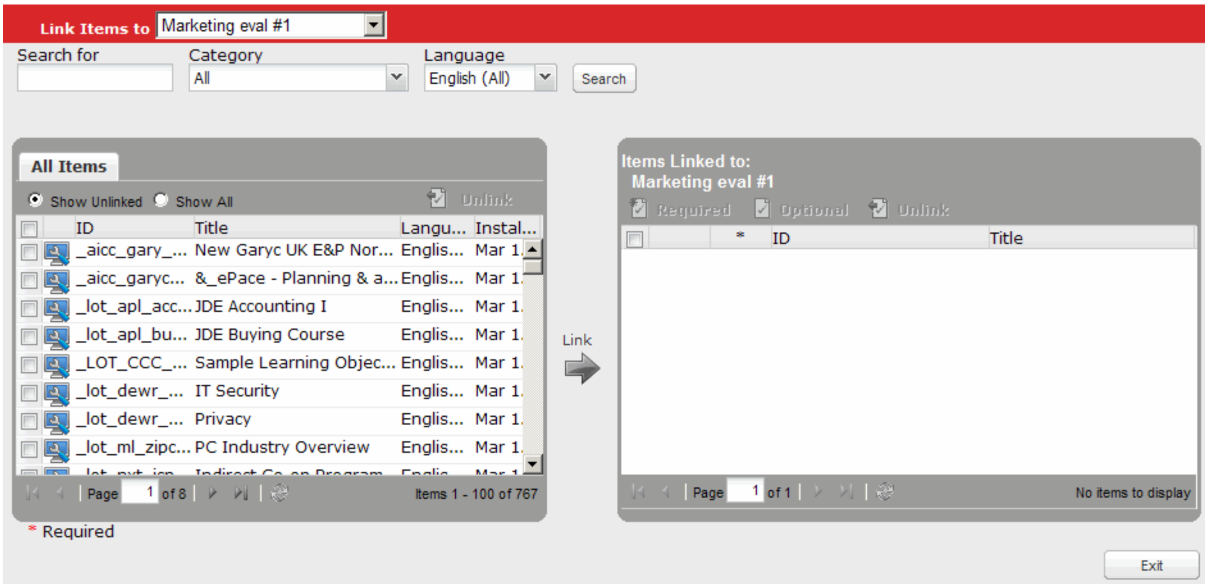
To link an evaluation to learning assets

1. Click **Content > Evaluations** on the navigation bar.

   The Evaluation Manager page displays.

2. Select the evaluation you want to link, and click **Link**.

   The **Link Items** page displays, showing the assets in the left pane and the linked items in the right pane. You can resize the panes on this page to adjust the viewing window.



   The **Link Items** page has three main areas:

   - **Search panel:** Use this panel at the top to specify the evaluation to link to from those available in the drop-down menu, as well as to choose search criteria when you search for folders and assets. For more information on this search tool, see ***Search for Assets and Folders*** on page 14.

- **All Items pane:** Use this pane to browse the assets in their current state (linked or unlinked), or to browse the results of a search.
- **Items Linked to pane:** Use this pane to view the assets that are linked to the selected evaluation. In this pane, you can also specify whether evaluations are required or optional, as well as unlink assets from an evaluation.

If desired, you can modify the presentation of the data on the page. To sort the assets, click the desired column header. To change the sort order, click the column header again. Or, click the down arrow next to the column header, and click **Sort Ascending** or **Sort Descending** on the menu.

3. In **Link Items to**, select the desired evaluation.

   For more information on the menu options on this page, see ***Options When Linking Evaluations*** on page 357.

   Note: An evaluation will no longer appear if an asset that it was linked to was uninstalled from the **Content Installer** tab.

4. In the All Items pane, select an asset or group of assets.
   - To select a range of assets, press and hold the **Shift** key, then click the first and last items in the range.
   - To select multiple assets, press and hold the **Ctrl** key, then click the desired items in the list.

5. Click **Link**. The selected assets display in the Items Linked to pane.

   You can also drag and drop selected assets into the right hand pane to link them to the selected evaluation.

   To require users to complete an evaluation after completing a linked asset, select **Required**. Otherwise, an evaluation remains optional for the user to complete.

   Note: For required evaluations, the user is prompted to complete the evaluation after completing the linked asset. If the user does not complete the evaluation at that time, a reminder message displays whenever the user subsequently logs in to Skillport. Required evaluations cannot be deleted from a user's **Assigned Learning** tab of his learning plan. If the evaluation is optional, a user is not required to complete the evaluation, and he can delete the evaluation.

6. When you are finished linking assets to evaluations, click **Exit**.

7. Assign the content with a linked evaluation to a user's learning plan using the **Learning Plan Assignment** tab.

   The specified evaluation displays in the asset Details page for the linked asset and in the user's learning plan upon their completion of the asset.

Note: Content that cannot be completed (for example, Job Aids, SkillBriefs, and Express Guides) does not place an evaluation in a user's learning plan.

Menu Options When Linking Evaluations

The following table describes the various controls and settings you can use when linking learning assets to an evaluation.

Option	Description
Search for	Allows you to enter a specific title or keyword to narrow your search results. ▪ The **Search Results** tab displays the returned results. ▪ Click **Show Details** to learn more about a specific asset before deciding to link it to an evaluation.
Category	Select one of 12 asset types from the drop-down list to narrow your search results.
Language	Select one of 18 languages from the drop-down list to narrow your search results.
Show Unlinked	When selected, displays all unlinked assets that can be linked to an evaluation. This is selected by default.
Show All	Displays all linked and unlinked assets that can be linked to an evaluation.
Unlink	Select to unlink an asset from an evaluation.
Required	Select this option to make completing an evaluation required after completing the linked asset. ▪ An evaluation automatically opens after an asset has been completed. ▪ If the user does not complete the evaluation, a reminder message displays whenever the user subsequently logs in to Skillport.
Optional	Select this option to make completing an evaluation for a specific asset optional.

Delete an Evaluation

Note: If you delete an evaluation, all the results associated with it will be deleted. If you unlink an evaluation from assets instead of deleting the evaluation, the data associated with that evaluation is retained, and you can report on it.

To delete an evaluation

1. Click **Content > Evaluations** on the navigation bar.

   The Evaluation Manager page appears.

2. Select an evaluation from the list.

3. Click **Delete**.

   The evaluation no longer displays in the list, and any linked assets are unlinked from the evaluation.

Credentials

Credentials are credits or certifications that users earn from professional certification organizations or from institutions of higher learning. Additionally, many companies develop their own internal (custom) credentialing programs, to ensure that workers are equipped with the job-specific skills necessary to support the company direction.

Create a Custom Credential

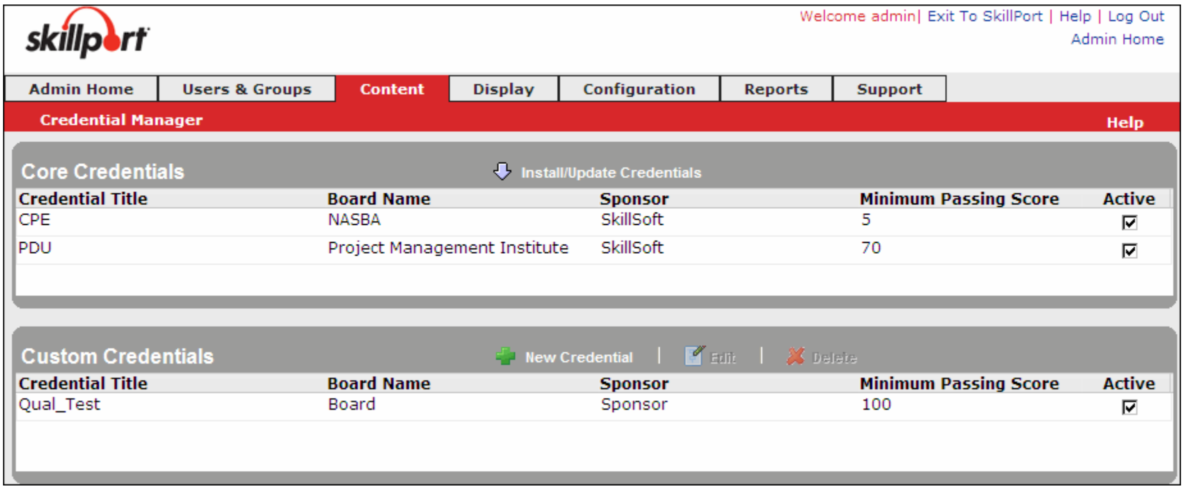
Custom credentials can be created with assets you select that align well with a defined skill set or business initiative. By developing these internal ("custom") credentials, organizations can ensure that workers are equipped with the job-specific skills necessary to support the company direction within their department.

Note: You can only create credentials at the company level. Advanced groups are not supported for Credentialing.

To create a custom credential

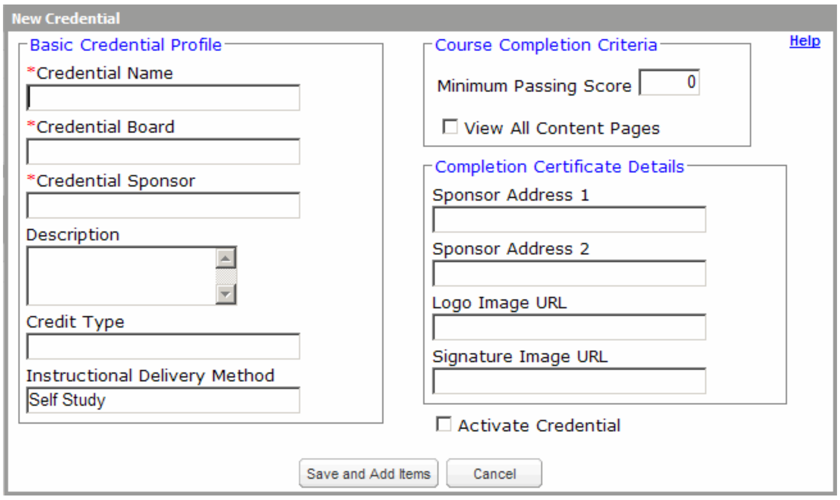
1. Click **Content > Credentials** on the navigation bar.

   The Credential Manager page appears.



2. In **Custom Credentials**, click **New Credential**.

The New Credential dialog box appears.



3. Enter the information for the credential using the fields provided:

Field	Description
Credential Name	The name of the credential. This name will appear in the SkillPort UI. This is a mandatory field. The credential name must be less than or equal to 60 characters and cannot include the plus (+) sign.
Credential Board	The group of professionals in a professional association that establish the subject standards, policy, and Credential requirements. This is a mandatory field. The board name must be less than or equal to 60 characters and cannot include the plus (+) sign.
Credential Sponsor	The organization approved by a Credentialing board to carry out the Credential requirements. This is a mandatory field. The sponsor name must be less than or equal to 60 characters and cannot include the plus (+) sign.
Description	A description of the Credential. This description displays for the Credential on the main Credentialing page. The description must be less than or equal to 1,000 characters and cannot include the plus (+) sign.
Credit Type	A unit of credit that varies depending on the type of Credential. The credit type must be less than or equal to 50 characters and cannot include the plus (+) sign. Examples of credit type are: ▪ NASBA: CPE ▪ PMI: PDU ▪ ISM: Contact Hour ▪ CFP: CE
Instructional Delivery Method	The method of instruction. This value must be less than or equal to 150 characters and cannot include the plus (+) sign. For NASBA, the default value of this field is "Self Study". Other values include group-live, group-internet based, lectures, teleconferencing, and so on.

Field	Description
Course Completion Criteria (Minimum Passing Score)	Course completion criteria is a combination of the minimum passing score set and, if selected, viewing all content pages. The minimum score that a learner must earn to receive credit for a course must be an integer value between 0 and 100, inclusive. **Note:** The rule for assessing course completion is as follows: If View All Content Pages (described immediately below) check box is selected, then course completion is contingent upon meeting the following criteria: ▪ The learner's score is equal to or greater than the score you set in this Passmark field AND ▪ The learner has viewed all of the pages in the course If View All Content Pages check box is not selected, then course completion is contingent upon only the learner's score being equal to or greater than the score you set in this Minimum Passing Score field.
View all Content Pages	Whether or not a learner must page through every page of a course to get credit for that course. Possible values are True or False; the default value is False. **Note:** Minimum Passing Score (above).
Sponsor Address 1	The first line of the address that appears on the Credential certificate. The address must be less than or equal to 199 characters and cannot include the plus (+) sign.
Sponsor Address 2	The second line of the address that appears on the Credential certificate. The address must be less than or equal to 199 characters and cannot include the plus (+) sign.
Logo Image URL	The simple file name of the certificate logo that you are using for the credentialing certificate. The file name must be less than or equal to 49 characters, and it cannot include the plus (+) sign or the double quote (") character. For example, to use the image in a graphics file named CompanyX_Logo.gif, specify CompanyX_Logo.gif as the value of this field. This graphics file must be either .jpg or .gif file, and it must be 240 pixels long X 86 pixels high. **Note:** You must copy this graphics file into the SkillPortFE\custom\<SName> directory, where <SName> is the value of "Short Company Name" for SkillPort Company as exhibited inside the Master Admin.
Signature Image URL	The file name of the signature that you are using for the credentialing certificate. This file should contain the image of the customized signature for the certificate. The file name must be less than or equal to 149 characters, and it cannot include the plus (+) sign or the double quote (") character. For example, to use the image in a graphics file named CompanyX_Signature.gif, specify CompanyX_Signature.gif as the value of this field. This graphics file must be either .jpg or .gif file, and it must be 240 pixels long X 86 pixels high. **Note**: You must copy this graphics file into the SkillPortFE\custom\<SName> directory, where <SName> is the value of "Short Company Name" for SkillPort Company as exhibited inside the Master Admin.
Activate Credential	Selecting this check box activates the credential and makes it available to

Field	Description
	users.

1. Click **Save and Add Items** to create the credential.

   The Edit Credential page appears, allowing you to add assets to the credential.

Note: After the credential is created, you must add courses to it and then activate the credential in order to make it available to users. (The credential is deactivated by default).

2. Add assets to the credential.

Add or Remove Assets from a Custom Credential

Custom credentials are composed of assets that can be completed. Only these types of assets can be added to a Credential. They are:

- Course
- Custom Content
- Final Exam
- Practice lab
- Project
- SkillSim
- Test Prep

Types of non-completable assets, such as Knowledge Centers, Learning Programs, and Job Aids, cannot be included in a custom Credential.

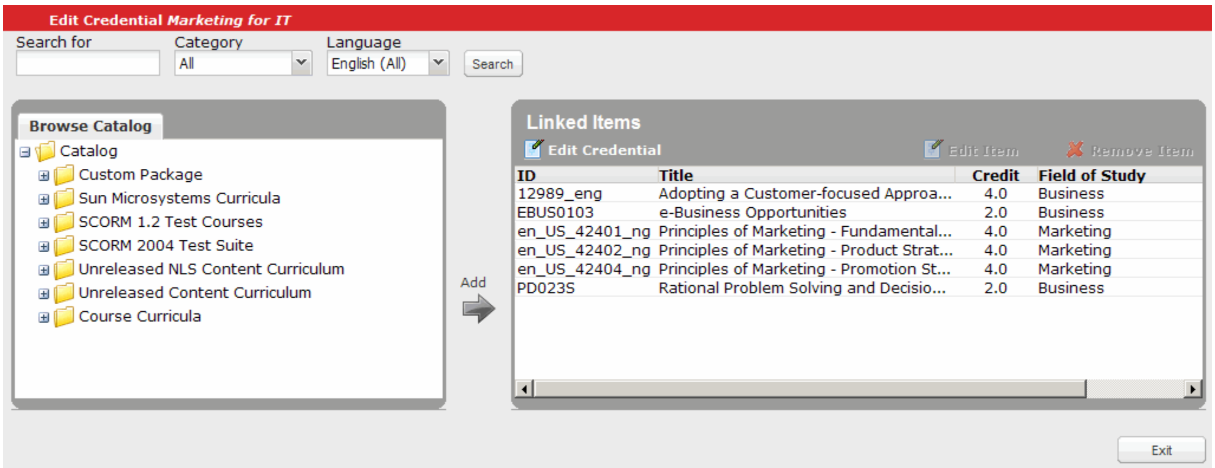
To add assets to a custom credential

1. Click **Content | Credentials** on the navigation bar.

   The Credential Manager appears. Select a custom credential from the list.

2. Click **Edit**.

   The **Edit Credential** screen appears.



The Edit Credential screen is divided into two resizable panes. You use the left pane to browse the Catalog in its current state or to browse the results of a search. The right pane will display assets that are linked to the custom credential.

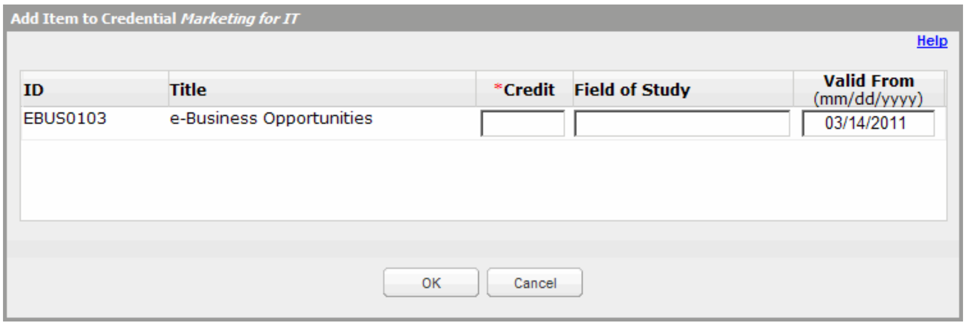
Note: For detailed information on the search tool, including tips on creating search expressions, see ***Search for Assets and Folders*** on page 14.

3. Select the asset or assets that you want to add to the Credential from the list displayed in the left pane.

   - To select a range: press and hold down the SHIFT key, and then click the first and last item in the list.

   - To select multiple items: press and hold down the CTRL key, and then click individual items in the list.

4. Click **Add**  between the two panes. The Add Item menu appears.



5. Fill in the following fields for each course in the link:

   - Credit - The number of credits that this asset is worth. This field cannot be empty and should include a numeric value.

   - Field of Study - The subject of the credential. This value must be less than or equal to 50 characters. For NASBA CPE credit, the currently valid options for this field are Accounting and Auditing, Consulting Services, Ethics, Management, Personal Development, Specialized Knowledge and Applications, and Taxation.

Note: The Field of Study field is not required for non-NASBA Credentials.

   - Valid From - The date that this credit is available for this asset. For NASBA and PMI credentials, this value is specified in an XML file. For custom credentials, this value is the current date.

6. Click **OK**. The asset will now appear in the right hand pane as linked to the custom credential.

7. When done adding assets to the credential, click **Exit** to return to the Credential Manager.

To remove courses from a custom credential

1. Click **Content | Credentials** on the navigation bar.

   The Credential Manager appears.

2. Select a custom credential from the list and click **Edit.**

The **Edit Credential** screen appears. Select the course or courses that you want to remove from the Credential from the list displayed in the right pane.

- To select a range: press and hold down the SHIFT key, and then click the first and last item in the list.
- To select multiple items: press and hold down the CTRL key, and then click individual items in the list.

3. Click **Remove Item**. A warning message is displayed confirming your selection.
4. Click **OK** to remove the item from the credential.

Note: A learning program cannot be part of a Credential.

Edit an Asset in a Custom Credential

To edit an asset in a Custom Credential

1. Click **Content > Credentials** on the navigation bar.

   The Credential Manager page appears.

2. Select the desired credential in the Custom Credentials list, and click **Edit**.

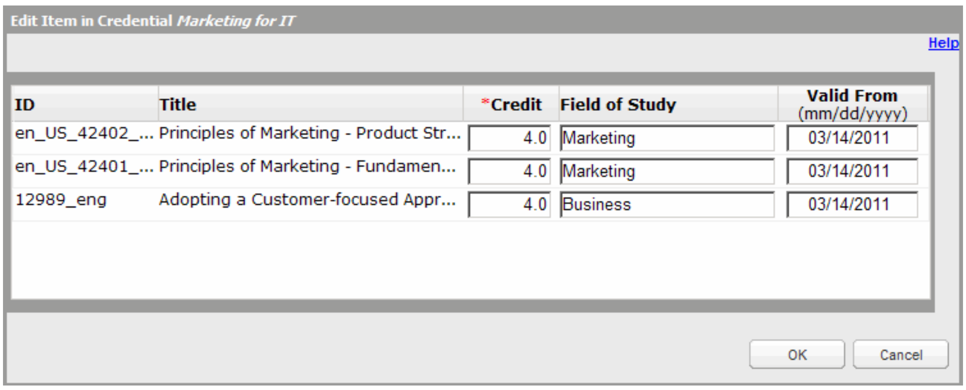
   The Edit Credential page appears. The right pane displays the assets that are currently linked to that credential. You can resize the panes to better view the asset details or the course catalog.

3. In the Linked Items pane, select one or more assets to edit.

   - To select a range of assets, press and hold the **Shift** key, then click the first and last items in the range.
   - To select multiple assets, press and hold the **Ctrl** key, then click the desired items in the list.

4. Click **Edit Item**.

   A list of the selected assets displays.



5. Edit the **Credit**, **Field of Study**, and **Valid From** fields as desired.

6. Click **OK**.

   The changes display in the right pane of the Edit Credentials page.

7. Click **Exit** to return to the Credential Manager page.

Edit Information about a Custom Credential

You cannot edit a core credential, but you can edit a custom credential.

To edit information about a custom credential

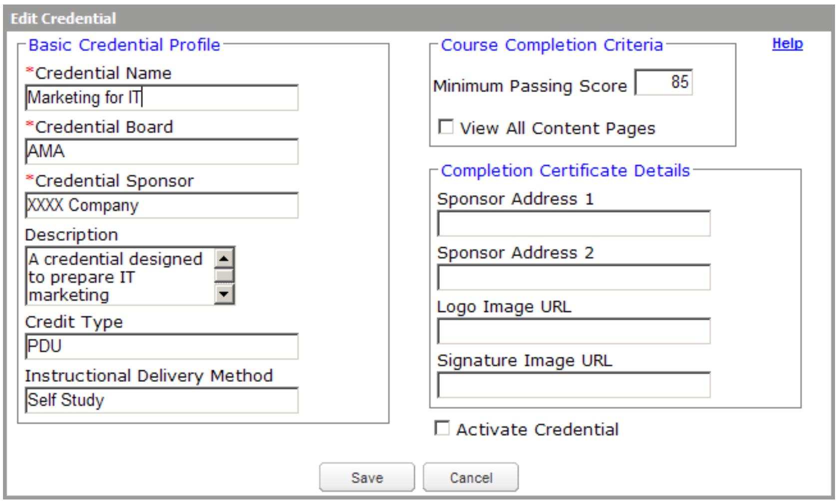
1. Click **Content > Credentials** on the navigation bar.

   The Credential Manager page appears.

2. Select the desired credential in the Custom Credentials list, and click **Edit**.

3. On the Edit Credential page, click **Edit Credential** in the Linked Items pane.

   The Edit Credential page appears.



4. Edit the information for the credential using the fields provided:

Field	Description
Credential Name	The name of the credential. This name will appear in the SkillPort UI. This is a mandatory field. The credential name must be less than or equal to 60 characters and cannot include the plus (+) sign.
Credential Board	The group of professionals in a professional association that establish the subject standards, policy, and Credential requirements. This is a mandatory field. The board name must be less than or equal to 60 characters and cannot include the plus (+) sign.
Credential Sponsor	The organization approved by a Credentialing board to carry out the Credential requirements. This is a mandatory field. The sponsor name must be less than or equal to 60 characters and cannot include the plus (+) sign.
Description	A description of the Credential. This description displays for the Credential on the main Credentialing page. The description must be less than or equal to 1,000 characters and cannot include the plus (+) sign.

Field	Description
Credit Type	A unit of credit that varies depending on the type of Credential. The credit type must be less than or equal to 50 characters and cannot include the plus (+) sign. Examples of credit type are: ▪ NASBA: CPE ▪ PMI: PDU ▪ ISM: Contact Hour ▪ CFP: CE
Instructional Delivery Method	The method of instruction. This value must be less than or equal to 150 characters and cannot include the plus (+) sign. For NASBA, the default value of this field is "Self Study". Other values include group-live, group-internet based, lectures, teleconferencing, and so on.
Course Completion Criteria (Minimum Passing Score)	Course completion criteria is a combination of the minimum passing score set and, if selected, viewing all content pages. The minimum score that a learner must earn to receive credit for a course must be an integer value between 0 and 100, inclusive. **Note:** The rule for assessing course completion is as follows: If View All Content Pages (described immediately below) check box is selected, then course completion is contingent upon meeting the following criteria: ▪ The learner's score is equal to or greater than the score you set in this Passmark field AND ▪ The learner has viewed all of the pages in the course If View All Content Pages check box is not selected, then course completion is contingent upon only the learner's score being equal to or greater than the score you set in this Minimum Passing Score field.
View all Content Pages	Whether or not a learner must page through every page of a course to get credit for that course. Possible values are True or False; the default value is False. **Note:** Minimum Passing Score (above).
Sponsor Address 1	The first line of the address that appears on the Credential certificate. The address must be less than or equal to 199 characters and cannot include the plus (+) sign.
Sponsor Address 2	The second line of the address that appears on the Credential certificate. The address must be less than or equal to 199 characters and cannot include the plus (+) sign.
Logo Image URL	The simple file name of the certificate logo that you are using for the credentialing certificate. The file name must be less than or equal to 49 characters, and it cannot include the plus (+) sign or the double quote (") character. For example, to use the image in a graphics file named CompanyX_Logo.gif, specify CompanyX_Logo.gif as the value of this field. This graphics file must be either .jpg or .gif file, and it must be 240 pixels long

Field	Description
	X 86 pixels high. **Note:** You must copy this graphics file into the SkillPortFE\custom\<SName> directory, where <SName> is the value of "Short Company Name" for SkillPort Company as exhibited inside the Master Admin.
Signature Image URL	The file name of the signature that you are using for the credentialing certificate. This file should contain the image of the customized signature for the certificate. The file name must be less than or equal to 149 characters, and it cannot include the plus (+) sign or the double quote (") character. For example, to use the image in a graphics file named CompanyX_Signature.gif, specify CompanyX_Signature.gif as the value of this field. This graphics file must be either .jpg or .gif file, and it must be 240 pixels long X 86 pixels high. **Note**: You must copy this graphics file into the SkillPortFE\custom\<SName> directory, where <SName> is the value of "Short Company Name" for SkillPort Company as exhibited inside the Master Admin.
Activate Credential	Selecting this check box activates the credential and makes it available to users.

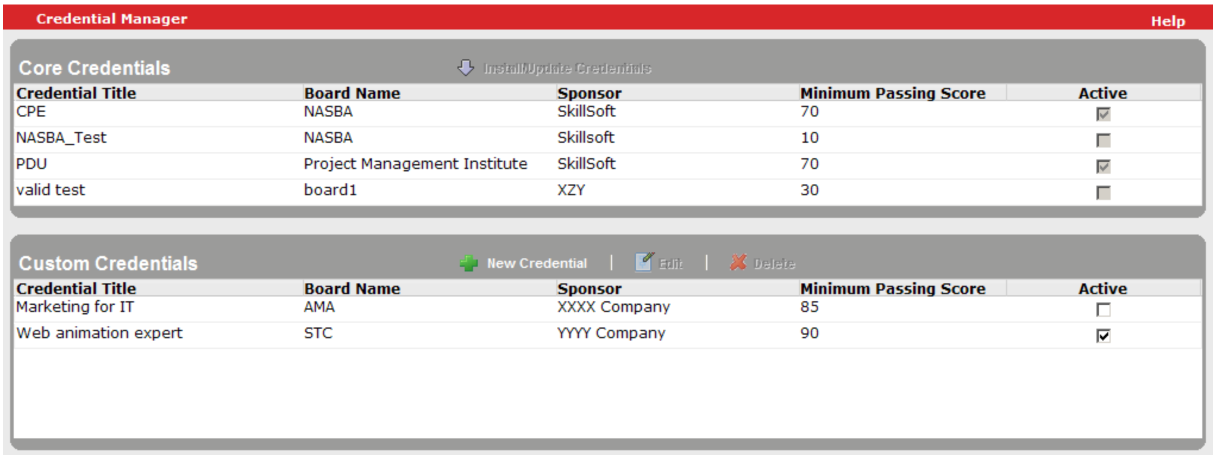
1. Click **Save** to update the changes to the credential.

Activate or Deactivate a Custom Credential

To activate or deactivate a custom credential

1. Click **Content > Credentials** on the navigation bar.

   The Credential Manager page appears.



2. To activate a credential, select the corresponding check box in the **Active** column.

   The credential is activated and is available to users. Once a credential is active, users can earn credits for courses associated with the credential.

3. To deactivate a credential, clear the corresponding check box in the **Active** column.

Note: Make the Credentialing shortcut available by enabling it on the Navigation Shortcuts page.

Delete a Custom Credential

To delete a custom credential

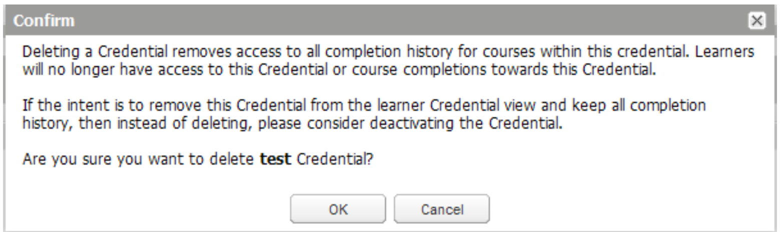
1. Click **Content > Credentials** on the navigation bar.

   The Credential Manager page appears.

2. Select a custom credential from the list.

3. Click **Delete**.

   The following warning message displays:

   Note: If you delete a credential, it cannot be undone. To deactivate it instead, click **Cancel** and follow the steps in Activate or Deactivate a Custom Credential. Deactivating a credential retains the completion history and removes the credential from the learner view.

4. Click **OK** to delete the credential.

Skillsoft Publisher

The Skillsoft Publisher is an easy-to-use web application included with Custom Content hosting agreements. It allows you to upload, preview, test, and publish your proprietary e-learning content directly to Skillport.

To access Skillsoft Publisher to upload courses, click **Content > Skillsoft Publisher** on the navigation bar.

With the Skillsoft Publisher, you can:

- Upload content from your computer to Skillport upload servers through a virus check scan.
- Verify that content has been properly converted.
- Move the content to your specific Skillsoft content server.
- Preview and test the content on a separate Preview Site.
- Publish content to the live production site.

View the online ***Skillsoft Publisher documentation*** to learn more about this application.

Skillsoft Publisher

You can access Skillsoft Publisher from Skillport to upload the courses mentioned above, by clicking **Content > Skillsoft Publisher** on the navigation panel of the Administrator menu.

You can upload a range of course content in Skillsoft Publisher, including: **AICC**, **Dialogue**, **Passive**, **SCORM 1.2 RTE**, **SCORM 2004**, **SkillStudio**, **SCORM, mSpark** and **Packaged Content**.

You can also publish **Passive content** directly from Skillport. For more information, refer to the section on Uploading Passive Content.

For information on Passive and Active content types, see Content Types.

Upload Passive Content

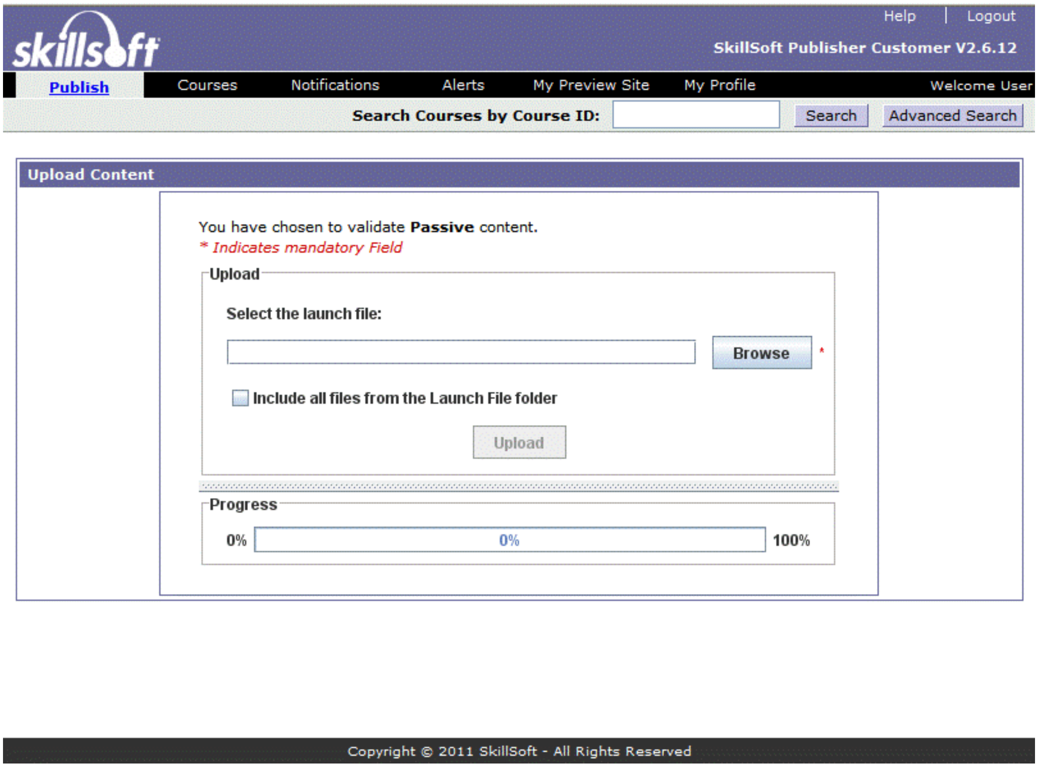
You can publish passive content directly from Skillsoft Publisher to Skillport.

To upload passive content

1. Click **Content > Upload Passive Content** on the navigation bar.

   Skillsoft Publisher opens in a new window.

The **Publish** tab displays the **Upload Content** page, where you can browse to your content, upload the passive course content, and execute the publishing process.



In Skillsoft Publisher, the actual display for the **Publish** tab allows you choose the type of content you wish to upload, view notifications pertaining to content deployment status, and view the most recently uploaded courses and their status.

To view this page, click the **Publish** tab. You can also view this page when you click **Publish other content** on the result pages of the publishing process.

CHAPTER 4
Display

In This Chapter

Configuring the Skillport User Interface

The topics in this section provide an overview of the various areas of Skillport that you can configure. Refer to the rest of the topics in the **Display** section of the help for information on how to make the associated changes.

Sign In Page

You can customize the login page of Skillport so that it best suits your organizational needs. View the following image and descriptions to learn about areas that you can customize on the Skillport login page.

1. Banner Logo

The banner graphic can be replaced with a custom graphic.

2. Welcome to Skillport Splash Logo

The splash logo can be replaced with a custom graphic.

3. Welcome Message

The welcome message can be modified or removed completely.

4. Assistive Technology Link

Web Accessibility is Skillsoft's implementation of Section 508 compliance standard, which allows learners with disabilities to utilize information on a computer. If enabled on your site, the Assistive Technology link is right justified at the top of the login page. To enable this feature, consult your Skillsoft representative.

5. Labels for Login Fields

The login and password labels can be modified.

6. Forgot Your User ID / Forgot Your Password

Links to enable users to retrieve their user IDs and/or passwords can be added to the login page. Depending on how Skillport is configured, one or more of the following options may apply:

- The system can automatically email the learner's user ID.
- The system can prompt the learner to answer a security question.
- The system can automatically change the password and email it to the learner.

To enable these features, consult your Skillsoft representative.

7. Disclaimer Text

A disclaimer text message can be enabled on the login and/or registration page. To successfully login, a learner must click the disclaimer check box.

The text for this message is configurable.

8. Copyright Notice

The text color of the copyright notice can be changed. The copyright notice always appears centered at the bottom of the Skillport login page. The text is not configurable and cannot be removed.

9. Self-registration Fields / Group List

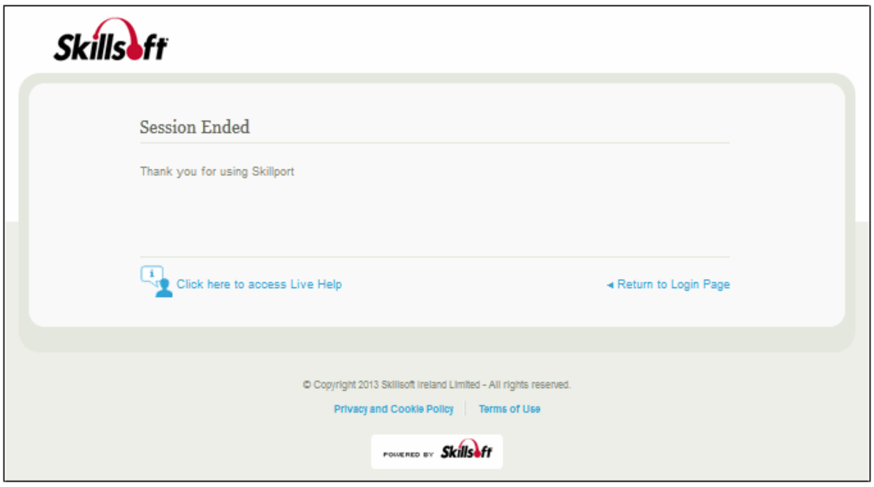
A link to enable users to register themselves can be added. The fields and labels on the registration form can be modified. Drop-down lists on the form can display groups in your organization's group hierarchy.

Pop-Up Messages (Not Shown)

A custom pop-up message can be added, such that the learner must acknowledge it before logging in.

Logout Page

When learners log out of Skillport, they can be sent to the default “good-bye” page, to a specified URL or to a custom URL. For information on setting and customizing the Logout page, see ***Login/Logout Options*** on page 381.



What's New Page

1. Image

The image can be replaced with a custom graphic or removed entirely using the What's New Page options.

2. Welcome Message

The welcome message (HTML content) can be replaced or removed.

3. Promoted Assets

Up to three assets can be highlighted in the Promoted Assets area. These can be replaced or removed.

Note: **Featured Topics** and **Browse the Library** are additional, configurable content areas contained on the What's New page. They are accessed from the Library page under the Content tab. See ***designating the Library's Featured Topics*** on page 225 and creating and designating browse views in Browse the Library for more details.

What's New Page Workflow

You can configure the Skillport Learner user interface (UI) in a number of ways to optimize the UI look and feel, as well as the display of content, to best meet your organization's learning goals.

To configure the What's New page

1. Configure the navigation options by customizing:
   - the top navigation options,
   - the toolbar, and
   - the Quick Links menu.
2. Update messaging, images, and promoted content on the What's New page to keep current information in front of your learners.
3. Customize the colors of your site to align with your organizational color scheme.
4. Set banner images for desktop and mobile environments, as well as other web site settings such as a logo image and browser title bar text.

What's New Page Options

You can customize messaging, images, and featured content on the Skillport home page to best suit your organizational needs and goals.

Note the following:

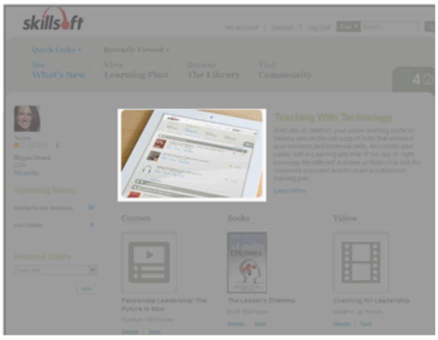
- Welcome messaging and a default image auto-populate the What's New page and remain if you choose not to customize the page.
- If you delete the default welcome message and do not enter a custom message, this area will be left blank.
- If you delete the default image and do not upload a new image, the welcome message area expands to fill up the space where the image would have displayed.
- If you hide the promoted asset's visibility or choose to remove your promoted assets, this area will be left blank.
- You cannot customize the **Upcoming Events** or **Featured Topics** labels.

Note: The Upcoming Events and Featured Topics sections only appear if there is companion content to display.

To customize the What's New page image

1. Click **Display > See What's New**.

   The See What's New page displays, showing the image editing options as well as the image page placement.

2. Select the **Visibility: Display On Page** check box to ensure the image is visible on the What's New page.
3. Select **Use custom image**.
4. Click **Add**.
5. Click **Browse** to browse to the image on your computer.

   Note: Image files are limited to 5 MB and must be .jpg, .gif., or .png format. If an image is more than 690 pixels wide, it displays at 690 pixels (width).

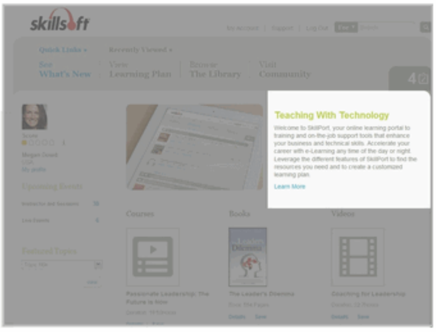
6. Click **Upload** to upload the image.

7. Click **Save** to save your changes.

To customize the What's New page welcome message

1. Click **Display > See What's New** on the navigation bar.

   The See What's New page displays, showing a message customization area and the message page placement in Skillport.

2. Select the **Display on Page** check box to ensure the message is visible on the What's New page**.**

3. From the **Language** drop-down list, select the language in which you want the message to display.

4. In the text entry box, enter the welcome message. You can use the available formatting options (bold, italic, underline, bulleted and numbered lists, as well as the hyperlink options).

Important Considerations about What's New Message Text

- Copying and pasting pre-formatted text from third-party applications (such as Microsoft Word) is not supported; doing so can result in hidden characters being pasted into the text field, resulting in inconsistent and improper text formatting on the What's New page.

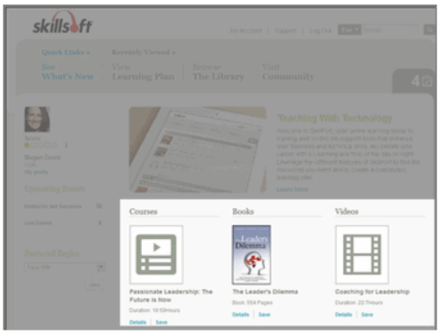
- You can create different welcome messages for different advanced user groups and domains. If you delete the default welcome message and do not enter a custom message, no message displays and the area is blank.

- In the What's New message text, using hashtags within a link from your Skillport site is not supported. Skillsoft suggests using the Share feature to generate a link for the What's New message text.

To customize the What's New page promoted assets

1. Click **Display > See What's New**.

The See What's New page displays, showing the asset selection options and page placement.



2. Select the **Visibility**:**Display On Page** check box.

3. Click **Select Assets**.

   The Asset Selection dialog box displays the Catalog for you to browse and make your selections.

4. Locate the asset(s) in the left Catalog pane and click **Add** to add it to the **Displayed Assets** list in the right pane. You can select up to three assets to display in the promoted assets area. These can be either stock assets from the Skillsoft library catalogs or content that you have created and uploaded. Order these assets by using the up and down arrows. To remove an asset from the list, highlight it and click **Remove**.

Note: Job Aids and Skillbriefs cannot be selected as promoted assets.

5. Click **Save**.

Note: If you either do not select any assets for the What's New area or de-select the **Display on Page** check box, the promoted assets space will be left blank in the learner user interface.

Certificate of Completion Graphics

Learners can print a certificate of completion when they complete a course, and administrators can print a learner's certificate of completion once she completes a learning program.

The top and bottom graphics of the certificate can be replaced, but the wording cannot be changed. A cascading style sheet (CSS) is used to modify the text color and font.

Web Site Colors

You can customize the colors for many different areas of your Skillport site.

The Skillport color scheme is divided into six groups based on various functionality:

- **Group 1**: The content text and inactive (not current page) header link text (including the **My Profile**, **Log Out** and **Support** links)
- **Group 2**: Top right header background color, Search dropdown background, Search button background, background color of bars for sets and subsets, inactive (not current page) tab text, Bottom and right borders
- **Group 3**: Main header background and divider line
- **Group 4**: Active (current page) tab text and active (current page) header link text
- **Group 5**: The body background
- **Group 6**: Some page headings and selected navigation elements

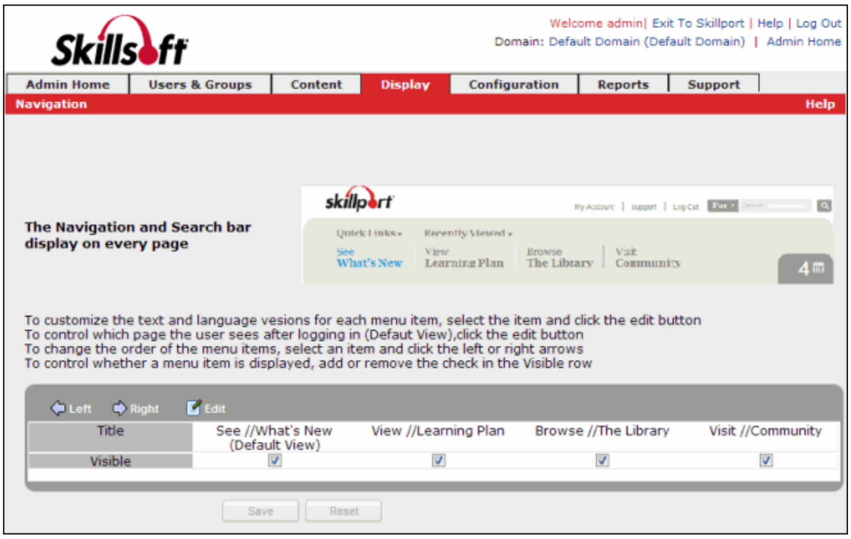
Default View

The **What's New** page is the default landing page for Skillport, but you can select a different menu option to designate as your Default View. You can also show, hide, reorder, and rename the default view as well as the other three main Skillport menu options on the Navigation page.

To set the default page for Skillport Learner

1. Click **Display > Navigation > Navigation**.

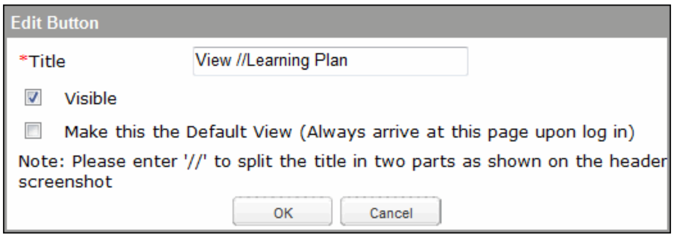
   The Navigation page displays:



2. Click the name of the page you wish to set as the default page you want your Skillport Learners to see upon sign in.

3. Click **Edit**.

   The Edit Button dialog box displays:



4. Check the **Make this the Default View (Always arrive at this page upon log in)** option.

5. Click **OK**.

   The Edit Button dialog box closes.

6. Click **Save**.

   Effective immediately, the newly-selected default page displays upon learner sign-in.

Sign In/Log Out Page Options

Login/Logout settings allow you to modify the appearance of Skillport's login page, goodbye page, and self-registration page.

To configure Login/Logout settings

1. Click **Display > Login/Logout Options** on the navigation bar.
2. Under Log In Options, configure the settings as needed:

Field	Description
Default Document URL	This is the absolute or relative URL a user accesses when attempting to sign into Skillport. The default is the main Skillport sign in page.
Welcome to Skillport Splash Logo URL	Enter the absolute or relative URL to the image to display on the sign in page. Restrictions: ▪ The image must be 300 x 200 pixels in size. ▪ The image must be saved in JPEG format with a .jpg extension. ▪ The image cannot be replaced with text, but you can use a screen shot of text, and use that as the image.
Enable Welcome Message Text	If checked, the text entered in the **Welcome Message Text** box is displayed on the login page. If unchecked, the text is not displayed.
Display Text Language	Select the language that you want the UI text to display in from the language drop-down menu.
Welcome Message Text	If the **Enable Welcome Message Text** check box is checked, this message displays on the Skillport login page. You can enter plain text or use the controls provided to enter HTML-formatted text (bold, italic, underline, ordered and unordered lists, and hyperlinks). **Note:** See the image at the bottom of this page for an example.
Login Fields Layout	Specifies the arrangement of the following controls on the login page: ▪ Label and text box for "Username" ▪ Label and text box for "Password" ▪ Disclaimer check box and text You can select to arrange the controls horizontally or vertically. The controls are ordered as above, and they are right-aligned.
Enable Pop-up in Login Page	Specifies whether to display a pop-up message to users when they log in to Skillport.
Pop-up Text	If the **Enable Pop-up in Login Page** check box is checked, this text

	is displayed in the pop-up message shown to users when they log in to Skillport. You can enter a maximum of 500 characters.

1. Under Log Out Options, for **Goodbye Page URL**, enter the The absolute or relative URL to the goodbye page that appears when a user logs out of Skillport.

2. Under Disclaimer Text, configure the settings as needed:

Field	Description
Enable Login Page disclaimer	If checked, the text entered in the **Disclaimer Text** box is displayed on the Skillport login page, and a user must accept the disclaimer (by checking the corresponding check box) before logging in to Skillport.
Enable Registration Page disclaimer	If checked, the text entered in the **Disclaimer Text** box is displayed on the Skillport self-registration page, and a user must accept the disclaimer (by checking the corresponding check box) before registering himself or herself.
Disclaimer Text	The disclaimer text that is displayed on the login page or the self-registration page (or both) when the corresponding disclaimer check boxes described above are checked. You can enter a maximum of 100 characters. You can enter plain text or use the controls provided to enter HTML-formatted text (bold, italic, underline, ordered and unordered lists, and hyperlinks).

3. Click **Submit Form**.

Navigation

Modify the Navigation options to alter the Skillport interface to match your organizational needs.

Navigation

You can use the Navigation page to show, hide, reorder, and rename these options. For information on how to specify the default page (view) a user sees immediately after logging in, see ***Default View*** on page 380.

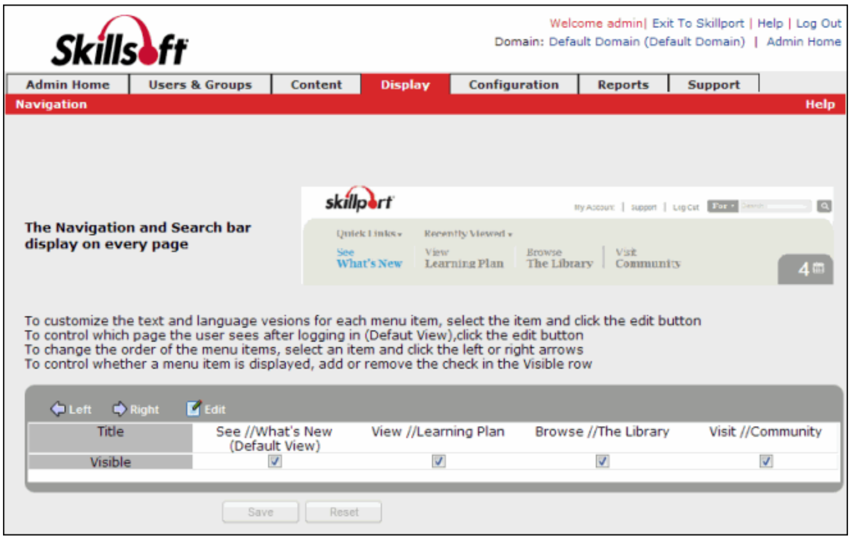
There are four stock navigation options that display in Skillport Learner:

- See What's New
- View Learning Plan
- Browse The Library
- Visit Community

To set the default page for Skillport Learner

1. Click **Display > Navigation > Navigation**.

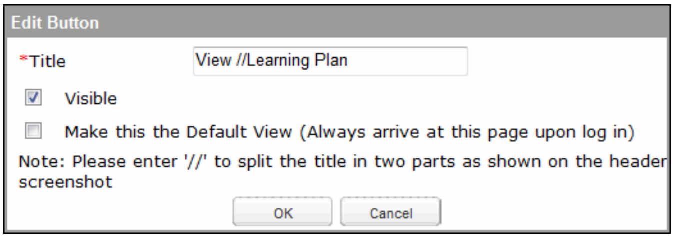
   The Navigation page displays:



2. Click the name of the page you wish to set as the default page you want your Skillport Learners to see upon sign in.

3. Click **Edit**.

   The Edit Button dialog box displays:



4. Check the **Make this the Default View (Always arrive at this page upon log in)** option.
5. Click **OK**.

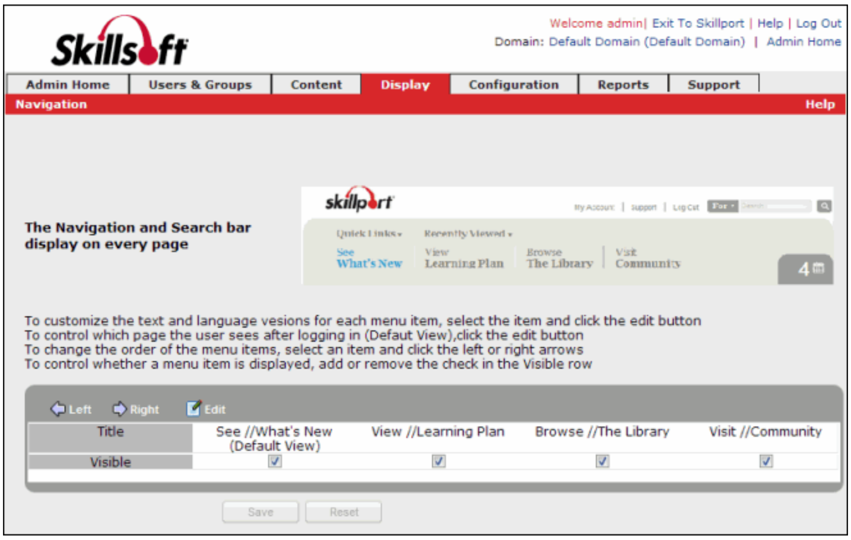
   The Edit Button dialog box closes.
6. Click **Save**.

   Effective immediately, the newly-selected default page displays upon learner sign-in.

To show or hide pages in the Skillport header

1. Click **Display > Navigation > Navigation**.

   The Navigation page displays:

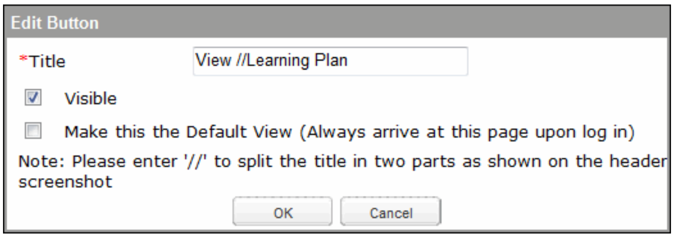


2. To hide a page in Skillport Learner, you can do one of the following:
   - Clear the corresponding check box in the Visible row
   - Use the Edit dialog box:

   a. Click the name of the page you wish to hide.

   b. Click **Edit**.

   The Edit Button dialog box displays:



   c. Clear the **Visible** option.

   d. Click **OK**.

   The Edit Button dialog box closes.

Note: The following happens in Skillport Learner when you hide the page:
- **See What's New:** The What's New page and contents are removed from Skillport Learner.
- **View Learning Plan:** The Learning Plan page are removed from Skillport Learner. Learners cannot access their learning plans from the header.
- **Browse the Library:** Learners cannot browse the Library, and the Search bar is removed from all Skillport Learner pages.
- **Visit Community:** Learners cannot access the Community feature of Skillport, and cannot see recommendations, their followers, or whom they are following. Learners cannot follow other members of the community.

3. To show a page in Skillport Learner, you can do one of the following:
   - Check the corresponding check box in the Visible row, or
   - Use the Edit dialog box:

   a. Click the name of the page you wish to show.

   b. Click **Edit**.

      The Edit Button dialog box displays.

   c. Select the **Visible** option.

   d. Click **OK**.

      The Edit Button dialog box closes.

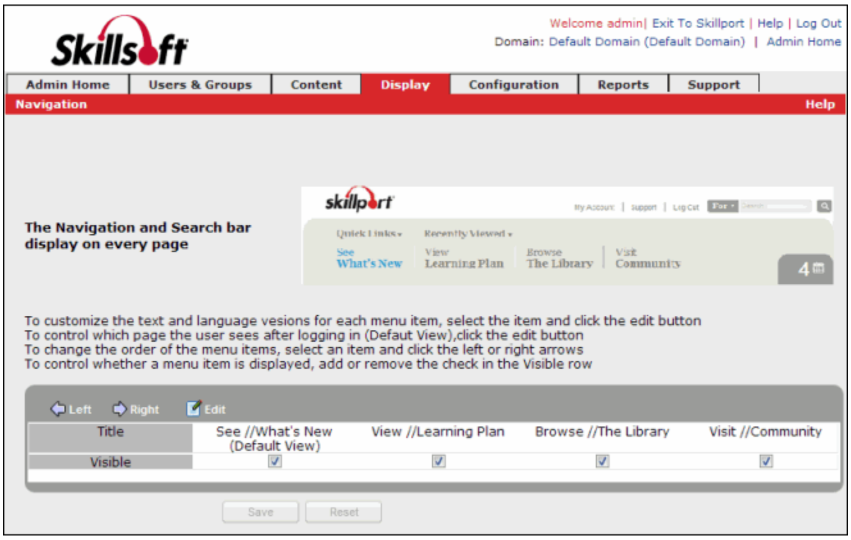
4. Click **Save**.

   Effective immediately, the page is hidden or shown in Skillport Learner, depending on your configurations.

To reorder the pages in the Skillport header

1. Click **Display > Navigation > Navigation**.

   The Navigation page displays:



2. Click the name of the page you wish to move.

3. Click the **Left** or **Right** buttons, as appropriate.

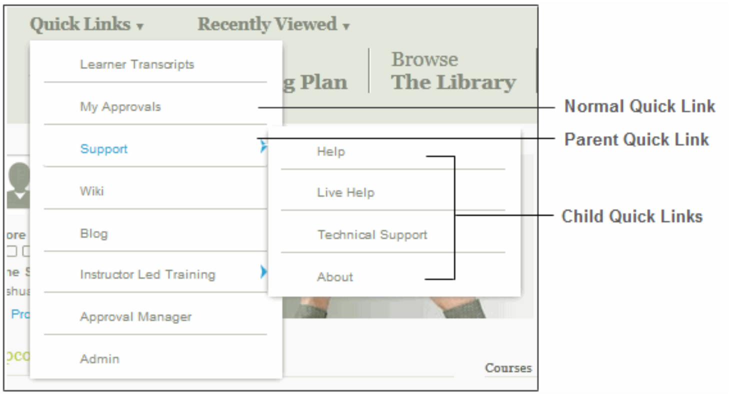
4. Click **Save**.

   Effective immediately, the changes display upon learner sign-in.

Quick Links

Quick Links provide access to specific sites (URLs) that are available from the main toolbar in the Skillport interface. Any company administrator or administrator can enable or disable Quick Links.

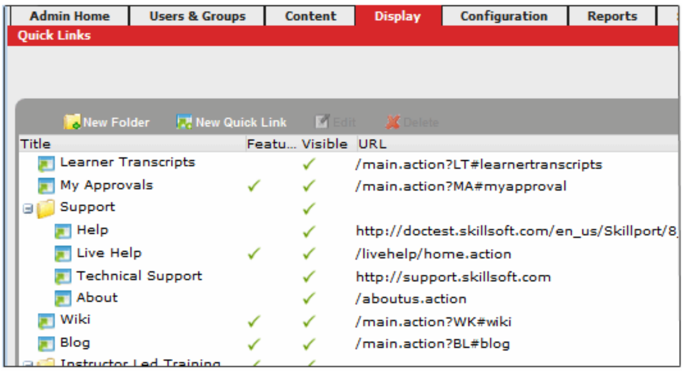
The following image compares an end user's view of a customized set of Quick Links with your view of the same Quick Links as you configure them in Skillport Administrator.



To configure Quick Links

1. Click **Display > Navigation > Quick Links** on the navigation bar.

   The Quick Links page displays.



2. To create a Quick Link:

   a. Select the Quick Link beneath which to create the new Quick Link. Alternatively, select the folder in which to create the Quick Link, and the system will create it at the bottom. (You can reorder the Quick Links at any time.)

   b. Click **New Quick Link**.

      The New Quick Link page displays.

   c. Enter the information for the shortcut.

Field	Description
Title	Specifies the text name of the link that appears in the Quick Links Menu. If the value is too long, the title will be shown with an ellipsis (…), but the tooltip will display the full Quick Link name. The titles of company-wide navigation Quick Links must be unique. The titles of normal/parent Quick Links must be unique within an advanced group. The titles of child Quick Links must be unique with respect to all other Quick Links with the same parent Quick Links.
URL	Specifies a relative or an absolute URL path to the Quick Link's target page. For more information on the valid format for absolute and relative paths, see Working with Hyperlinks. You can add a Quick Link to any type of text file, including HTML (.HTM, .HTML), Microsoft Word (.DOC), Acrobat PDF (.PDF), plain text (.TXT), etc.
Display	Indicates how to display the target page. ▪ **New Window**: The shortcut is launched in a new browser window. (This is the default option.) ▪ **Replace current window**: The shortcut is launched and takes over the browser window, replacing Skillport. The user may be able to click the Back button to return to Skillport. ▪ **Within Skillport frame**: The shortcut is launched as a pane inside the Skillport frame. This choice is recommended for web sites using simple HTML and no stylesheets. Many web sites do not display properly within the Skillport frame.
Visible	Indicates whether the Quick Link appears in Skillport. Select this check box to make the Quick Link available in the Skillport interface. Clear this check box to hide the Quick Link.
Manager and Admin	Controls the availability of the Quick Link based on a user's role. Select this check box to make the Quick Link appear only for users with roles other than End User.
508 accessible	Select (check) this check box if the target page supports Section 508 (also known as Web Accessibility) for users with disabilities. ▪ If the external target page supports Section 508, no warning is displayed when the user accesses the page from Skillport. ▪ If the external target page does not support Section 508, a warning dialogue appears to the user prior to the page loading in their browser.

a. Click **OK**.

1. To create a folder:

   a. Select the folder or Quick Link beneath which to create the folder, and then click **New Folder**.

   The New Folder dialog box displays.

   b. (Required) For **Title**, enter the folder's title.

c. Select the **Visible** check box if the folder should be visible. Alternatively, clear the check box if it should be hidden.

d. Click **OK**.

2. To reorder the folders and Quick Links, drag the item to its new location, and then drop it.
3. To edit a folder or Quick Link, select the item, and then click **Edit**.

Note: Skillport adds Quick Links if optional Skillport add-on modules are installed, for example, Community or KnowledgeCenters. You cannot change the value for the URL setting or the Display setting for these Quick Links.

4. To delete a folder or Quick Links, select the item, and then click **Delete**.
5. Click **Save**.

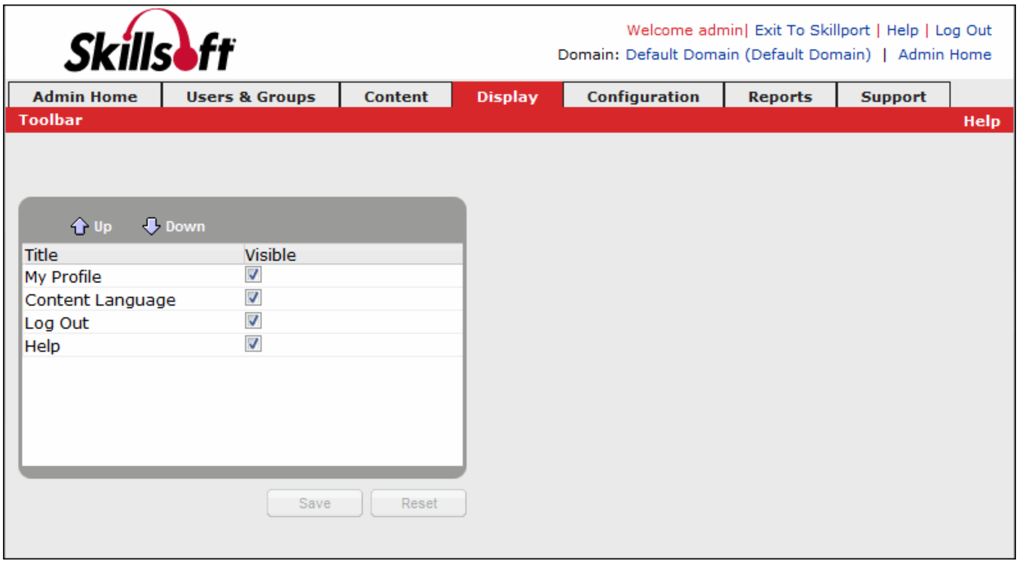
Toolbar

The toolbar in the upper-right of Skillport Learner allows the learner to change their profile information, access the Skillport documentation, change their content language, and log out.

To configure the toolbar

1. Click **Display > Navigation > Toolbar** on the navigation bar.

   The Toolbar page displays.



2. Select the options you want visible on your site.
3. To reorder the options, select an option and click **Up** or **Down**.

The order of the items in the list in Skillport Administrator determines their order from left to right in Skillport Learner.

4. Click **Save**.

Skins Options

Skins are alternative color schemes and graphics that modify the appearance of the Skillsoft Course Player (SCP). You can modify the look of the SCP in two ways:

- By creating a customized player skin, or
- By uploading a custom logo or image

For information on how to create a customized player skin, contact your Account Representative.

To set the skins directory for the Skillsoft Course Player

1. Click **Display > Player Skins** on the navigation bar.

   The Skin Options page display.

2. In **Skins Directory,** enter the URL of the directory where user skins are installed. The skins directory must be located on the same server as the Skillsoft Course Player and content.

3. Click **Save**.

Note: Setting a custom logo image overrides the custom skins directory. You can revert to the custom skins at any time by selecting **Reset** and reentering the URL for the skins directory.

To set a custom logo image for the Skillsoft Course Player

1. Click **Display** > **Player Skins** on the navigation bar.

2. In **Skillsoft Course Player Logo**, select either option:

   - **Use standard image**: Displays the Skillsoft logo in the upper left corner of the SCP.
   - **Use custom image**: Displays your custom logo image in the upper left corner of the SCP.

3. For **Use custom image**:

   a. Click **Add**.

   b. Click **Browse** to browse for the desired file, then click **Upload** to upload the image.

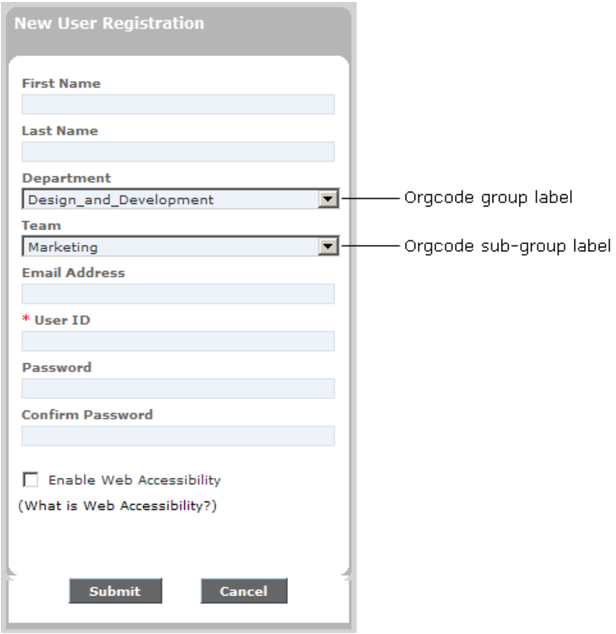
   Note: Recommended image dimensions are 62 pixels wide and 23 pixels high. Files are limited to 5 MB and jpeg, gif and png formats only.

4. Click **Save**.

Note: A custom skin or logo image applies to all content for the organization that displays in the Skillsoft Course Player. Player skin options are not available for the Skillsoft Mobile Player.

Registration

You can configure registration options that determine the layout and appearance of the New User Registration page that users use to create their own accounts. If you have made this page available to users (see ***Configure Self-Registration*** (on page 480)), it is available via a link on the Sign In page.



For information on specifying what fields (for example, **First Name** and **Last Name**) display on the New User Registration page, see ***Configure User Profile Information*** (on page 491).

To configure registration options

1. Click **Display > Registration** on the navigation bar.
2. Configure the registration options as needed. For help with this step, see the information that follows.

Field	Description
Group title / Orgcode Display at Self-Registration Page	Specify whether users can enter or select a ***user group*** on page 31 on the New User Registration page. The options are: ▪ **Default (Orgcode only)**: A single text field is displayed on the page. A user can enter an org code. You can change the label in Web Site Settings. ▪ **Single Select Box**: A single-select **Select Group** drop-down list is displayed on the page. Subgroups appear indented under their respective parent groups. You specify the label for this drop-down list using the **Orgcode Group Label** setting. For more information, see the *Single Select Box* section that follows. ▪ **Multiple Select Box**: Separate **Select Group** and **Select Sub-Group** drop-down lists display on the page. You specify the labels for these controls using the **Orgcode Group Label** setting and the **Orgcode Sub-Group** Label setting. For more information, see the

	Multiple Select Box section that follows. ▪ **Disabled**: No org code or group fields display on the page. **Note:** You must have a group hierarchy set up in order to register users into specific groups and organizations. If you want to make a group available on the New User Registration page, you must set the group's **Display on Registration Page** setting to **Yes** (via the Users & Groups interface).
If you select Multiple Select Box, values for the following settings are *required*.	
Orgcode Group Label	The field label for the parent group drop-down list. If you choose a Single Select Box display, this is the label for the drop-down list. If you choose a Multiple Select Box display, this is the label for the parent (first) drop-down list.
Orgcode Sub-Group Label	The field label for the subgroup (child) drop-down list (or lists, if there is more than one subgroup).
Orgcode group default selection text	The default text in the parent group drop-down list (which is selected).
Orgcode sub-group default selection text	The default text in the subgroup drop-down list (which is selected).
If you select Single Select Box, values for the following settings are *required*.	
Maximum allowed group count	The total number of ***groups*** on page 33 in your company must be less than the value specified here. Otherwise, the single Select Group drop-down list will not function.
Indentation character	The character used to indent subgroups under their respective parent groups.
Maximum group Level in Self Reg screen	The number of subgroups to display on the New User Registration page. Consult you system administrator before changing this value.

1. Click **Submit Changes**.

Colors

Use the Colors form to alter the appearance of the Skillport interface to match your organizational needs.

Note: You cannot customize the colors of the Skillport Mobile interface.

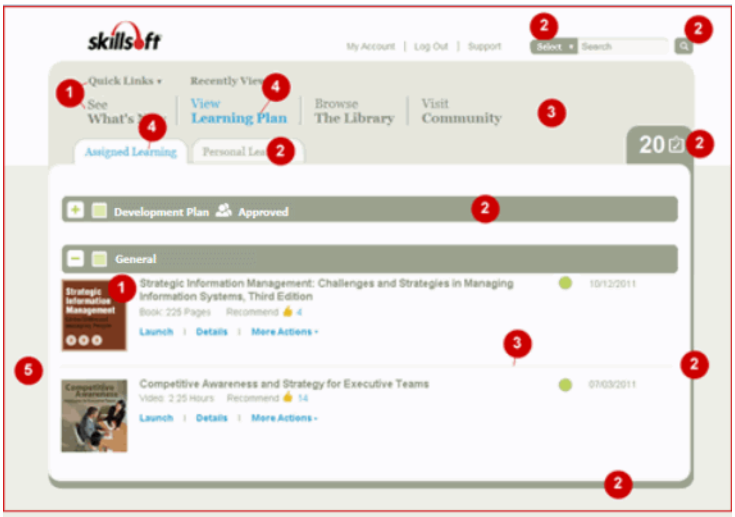
Colors and Browsers

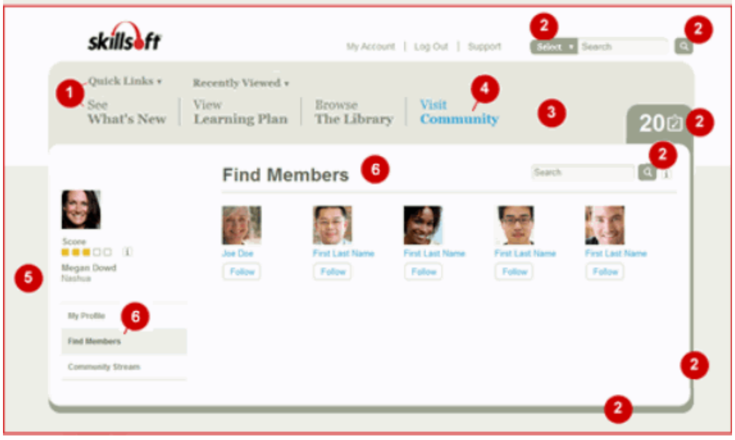
A browser-safe table of 252 colors is available in Skillport. These colors include 216 browser-safe color values and 36 grayscale colors common among supported browsers when running in 256-color mode.

Color Schemes

The Skillport color scheme is divided into groups based on functionality. See the images below for relative placement of the groupings and their affected areas. The groups are:

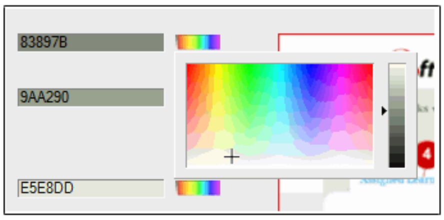
- **Group 1**: The content text and inactive (not current page) header link text (including the **My Profile**, **Log Out** and **Support** links)
- **Group 2**: Top right header background color, Search dropdown background, Search button background, background color of bars for sets and subsets, inactive (not current page) tab text, Bottom and right borders
- **Group 3**: Main header background and divider line
- **Group 4**: Active (current page) tab text and active (current page) header link text
- **Group 5**: The body background
- **Group 6**: Some page headings and selected navigation elements





To change a color scheme

1. Click **Display > Colors** on the navigation bar.
2. (Optional) Click in the rainbow panel next to the group(s) to show the Color Pick Table from which you can easily select browser-safe colors.



3. In the field for the group color scheme element that you want to change, specify a new color by doing one of the following:
   - Enter the hexadecimal value for the color. The hexadecimal value must include the # symbol, for example, #9999CC.
   - Click in the field, and then click a color in the Color Pick Table. This inserts the hexadecimal value for the selected color.
4. Repeat the previous step as needed to change other group color scheme elements.

5. Click **Submit**.

Note: To restore Skillport to its default color scheme, click **Restore Default Colors** at the bottom of the page.

Login Text Customizations

You can customize the default field labels that appear on the Skillport login page.

To configure the login text

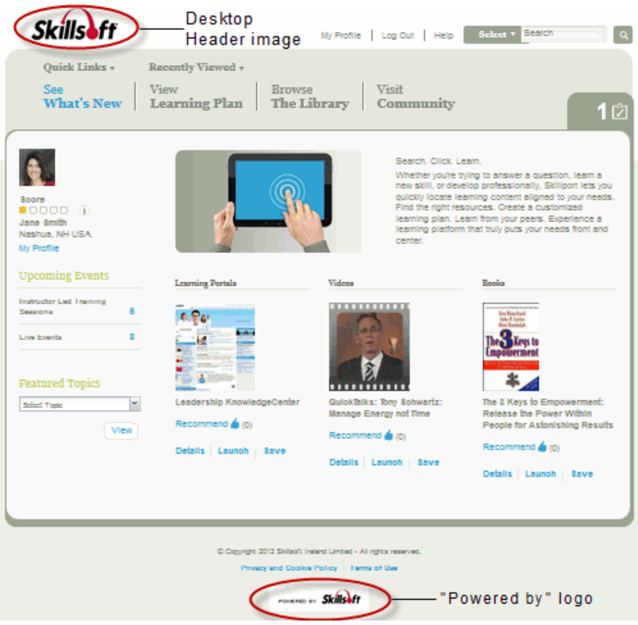
1. Click **Display > Text > Login Text Customizations** on the navigation bar.
2. Configure the settings as needed:

Field	Description
Alternative "login" text	The text label for the login name field (default is "User ID"). The following are possible alternatives: ▪ User name ▪ Email address ▪ Login ID ▪ Network login ▪ Employee number
Alternative "password" text	The text label for the password field (default is "Password"). The following are possible alternatives: ▪ Code ▪ Security code

1. Click **Submit Changes**.

Web Site Settings

Web site settings allow you to modify site settings such as banner images and alternative text for images.



To configure web site settings

1. Click **Display > Web Site Settings** on the navigation bar.
2. Configure the settings as needed:

Field	Description
Application Name	Customize the label for your Skillport site (use your company name, for example). This label displays in the browser's title bar.
Desktop Header Image	The banner logo that displays at the top of Skillport Administrator. ▪ Supported formats include .jpg, .gif and .png. ▪ The image must be 24-bit true color and a maximum size of 180 pixels wide by 68 pixels high. ▪ The image must be located in the \images directory of the Skillport installation (for sites hosted on Skillsoft servers, contact your Skillsoft representative to change this logo).
Mobile Header Image	The banner logo that displays at the top of Skillport Mobile. ▪ Supported formats include .jpg, .gif and .png. ▪ The image must be 24-bit true color and a maximum size of 64 pixels wide by 32 pixels high.

	▪ The image must be located in the \images directory of the Skillport installation (for sites hosted on Skillsoft servers, contact your Skillsoft representative to change this logo).
Organization Code Label	Label for the Organization Code field on the self-registration page. If you are building a self-registration page with a single or multiple select box, that label is modified in the Registration Options.
Display "Powered by" logo	Determines whether or not the "Powered by" logo will appear at the bottom of every Skillport page. Select the **Display "Powered by" logo** check box to make the logo display in the Skillport interface. Clear the check box to remove the logo.
Logo Image URL	Specifies a relative or an absolute URL path to the image. For more information on the valid format for absolute and relative paths see Hyperlinks.

3. Click **Submit Form.**

CHAPTER 5

Configuration

In This Chapter

Features

Books24x7

The Books24x7 settings control access to the Books24x7 content. Use this page to manage subscription information.

Note: The Books24x7 link only appears in the navigation menu if you have installed the Books24x7 add-on module.

Subscription Capacity

This section of the page provides details on the status your organization's Books24x7 subscription. The table shows the number of seats per collection reported by the Books24x7 site to the Skillport LMS:

- **Total**: The number of seats available for each collection.
- **Taken**: The number of seats already assigned for each collection.
- **Free**: The number of open seats for each collection.

Subscription Structure

This section of the page provides details on the status of a company's Books24x7 subscription. The table shows data reported by both Books24x7 and Skillport:

- **Collections**: The names of the collections included in the subscription.
- **Total**: The number seats allocated to the collection.
- **Taken**: The number of seats occupied by learners.
- **Free**: The numbers of seats available in the collection.

Subscription Updates

At the bottom of the page, you can update your subscriptions.

- **Import Subscription Changes:** Click to import information from Books24x7:
    - **Subscription Capacity**: The total number of seats for the Books24x7 subscription.
    - **Subscription Structure**: The total number of seats, organized by Collection name.

- **Import Users**: Click to synchronize user registration information between Books24x7 and Skillport. The user registration data stored in the Skillport database is replaced with the new data imported from Books24x7.
- **Release Seats**: Some administrative actions (for example, deleting users, deactivating users, moving users and groups, or editing Books24x7 collection assignments) can change the list of collections visible to users. However, some of the users may still be registered on the Books24x7 service. Click this button to un-register users from the Books24x7 service and release the taken seats.

Note: Removing, deleting, or reassigning Books24x7 collection assignments is prohibited under terms of your corporate license agreements except under specific conditions. Contact your Skillsoft representative to verify license terms before making any changes.

inGenius

Prior to using the Community feature of inGenius, you must enable it, set up a community, and assign a moderator to that community. Once complete, the **Visit Community** tab displays on your learners' Skillport home page.

Assign or Remove a Social Community Administrator

A social community administrator moderates comments reported as abuse on the Moderate Community page in Skillport Administrator (**Content > Moderate Community**).

Note: To access this page, you must log in with Company Admin privileges, or as an admin with *inGenius Settings* custom privileges. To set up a community, contact your Skillsoft representative. For more information about user roles, see User Privileges by Role.

To assign a social community administrator

1. Click **Configuration > Features > inGenius** on the navigation bar.

   The Social Community Settings page displays.

2. Configure the following settings:

Field	Description
Setup Social Community	This feature is configurable by Super Administrators only.
Enable Social Community	Select **yes** from the drop-down menu to enable the Community features in Skillport. **Note:** This is only available if there is a community set up and configured. If a community is not yet configured, contact your Skillsoft representative for setup.
Enable Social Community for Skillsoft Advantage	Select **yes** from the drop-down menu to enable the Community features for Skillsoft Advantage users.
Enable inGenius Score	Select **yes** from the drop-down list to enable the Community Score feature.

3. Choose a user for Social Community Administration by:

- Using search

a. Enter the name of the user you want to act as a community administrator. Click **Search**.

The search results display in the **Search Results** tab.

b. Click the user's name to select it.

c. Click Assign . The user name displays in the **User as inGenius Community Administrator** section.

d. Click **Submit**. A confirmation message displays at the top of the page.

- Using the list of users

a. In the **Users and Groups** list, click the Group to which the user belongs.

b. Locate the name of the user you want to act as a community administrator.

c. Click the user's name to select it.

d. Click Assign . The user name displays in the **User as inGenius Community Administrator** section.

e. Click **Submit**. A confirmation message displays at the top of the page.

Note: In order to be a social community administrator, the user must have Manager or above privileges in Skillport.

4. Click **Submit**. The user is now assigned as a social community administrator.

To remove a social community administrator

1. Click **Configuration > Features > inGenius** on the navigation bar.

   The Social Community Settings page displays.

2. In the **User as Social Community Administrator** section, click a user name to select it.

3. Click **Remove**.

4. Click **Submit**. The user is no longer assigned as a social community administrator and cannot access any of the community administrator features.

Monitor Community Abuse

Note: To access this page, you must log in as a Manager or above who has been designated as a social community administrator. For more information about user roles, see User Privileges by Role.

Community comments reported as abuse display on the **Moderate Community Comments** page. The social community administrator can edit the comment, delete the comment, or remove the abuse flag without action.

To review a comment marked as abuse

1. Click the **Admin** link at the top right of the page.

2. Click the **Content** tab.
3. Click **Moderate Communities**.

   The reported incidents of abuse display.
4. Click the comment you wish to review.

   The comment is highlighted.
5. To modify the comment:
   a. Click **Edit**.
   b. Modify the text.
   c. Click **OK**.
   d. Click the comment again to highlight it.
   e. Click **Remove Abuse Flag**.

      The comment is updated and the flag is removed from the comment.
6. To delete the comment, click **Delete**.

   The comment is deleted from the thread.
7. To leave the comment as is, click **Remove Abuse Flag**.

   The comment remains as it was written by the community member.

ILT

ILT Workflow

Workflow for ILT Admin

1. Configure ILT Site Settings. This enables you to customize ILT default values and actions to meet your organization's needs.

2. Configure Email Templates. You can determine whether each template is used or not, and whether to customize the text in any/all of the templates.

3. Configure Extended Attributes. This enables you to set up extended fields or attributes for sessions.

4. Assign roles to the Skillport users who function as administrators or instructors. If necessary, create these users.

5. Set up the Resources as follows:

    a. Manually create contacts or batch upload contacts; This is not just for facilities but can be "stand alone" contacts. Examples of contacts are vendors or facility managers who are used in putting on an ILT session.

    b. Manually create facilities or batch upload facilities; Facilities are physical structures where an ILT session can be held, like a conference center or onsite building.

    c. Manually create classrooms or batch upload classrooms; These classrooms are attached to the facility in which they reside.

6. Create ILT courses. You can create new courses by using the form available. Once the course has been created it is displayed in the grid.

7. Create ILT sessions for the courses created.

8. Manage Sessions.

    a. Confirm an ILT Session; By confirming a session, you are saying that the session will take place. There is an option in ILT system settings that allows any new session you create to automatically be marked as confirmed. By keeping this setting off, confirming a session is a manual process.

    b. ***Enrollments/Roster*** on page 328; This section is inclusive of enrolling and withdrawing learners to the roster for a session.

    c. Close to new enrollment; You can close a session to new enrollment if it is open.

    d. Complete a session; After a session has been held, an administrator or instructor must mark it as complete in order for students to receive credit.

    e. Archive old sessions.

9. View the ILT Event Journal. Event Journals are ILT-specific reports you can use to see all ILT activity.

Workflow for ILT Instructor

1. View **Sessions I am Teaching**.

2. Choose a specific session with which to work:
    a. Mail All Enrolled and Wait-listed Users (if desired – what to bring to class, location, etc.).
    b. Create Session Sign-in Sheet (if desired).
    c. Enter the Session Results (needed, but can also be done by an admin).
    d. Mark Session as Complete (finalize results - needed, but can also be done by an admin).
    e. Create Session Learner Report (if desired).
3. Managing Virtual Sessions - If you are conducting an online/virtual classroom session, chose that option, and then specify the criteria such as phone number, passcode, and URL to join the virtual session.

Extended Attributes

Understanding Extended Attributes
ILT courses and sessions have a default set of fields or “attributes”. ILT Extended Attributes allow you to customize courses and sessions to better fit the requirements of your organization. By going through this section, you can set up additional attributes for courses and sessions to include properties of your choosing, appropriate for your training program.

For example, if your organization assigns continuing education credits to ILT courses, you can add a single-select extended attribute called “CE Credits” that contains the credit choices available. When an ILT Admin creates a course, they will select the correct number of credits from the multi-select extended attribute field.

Note: Extended Attributes is an optional feature and may not be enabled on your system; to enable it, contact your Skillsoft representative.

Attributes can be of three types:

- Enter a simple text value - presented as a text field in the edit form
- Select a single value from a list of values - presented as a single select list (drop-down menu) in the edit form
- Select multiple values from a list of values - presented as a list box in the edit form

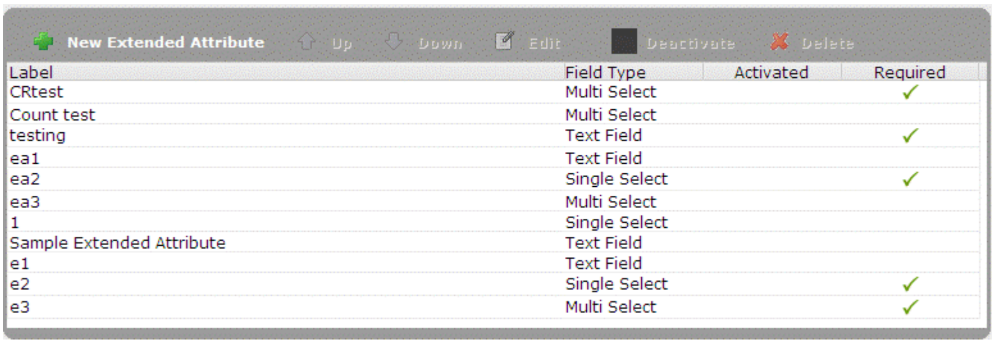
Any number of attributes can be created and they will be available on all courses and sessions. Attribute fields can be designated as required or optional. New attributes are not applied to existing sessions until an existing session is edited, but they are applied to subsequently created sessions.

View Extended Attributes

The extended attributes are displayed in a list.

To view extended attributes

1. Log in to Skillport.
2. Click **Configuration > Features > ILT > Extended Attributes** on the navigation bar. The extended attributes display.



Label	Field Type	Activated	Required
CRtest	Multi Select		✓
Count test	Multi Select		
testing	Text Field		✓
ea1	Text Field		
ea2	Single Select		✓
ea3	Multi Select		
1	Single Select		
Sample Extended Attribute	Text Field		
e1	Text Field		
e2	Single Select		✓
e3	Multi Select		✓

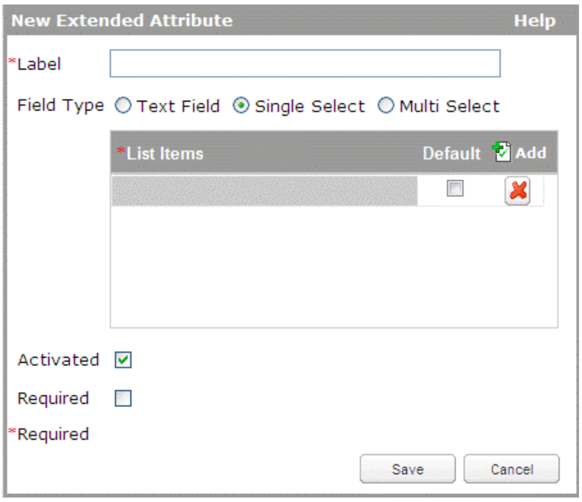
The created attributes are displayed in the grid. If the attributes are activated, then those attributes can be viewed/used in New/Edit/Copy Course/Session window. You can Activate or Deactivate an Extended Attribute.

Create a New Extended Attribute
Use this process to create and enter details of a new extended attribute.

To create an extended attribute

1. View Extended Attributes

2. Click the **New Extended Attribute** button. The **New Extended Attribute** dialog box displays.



3. Enter the extended attribute details.

   - **Label**: You can enter the label of the new attribute. The label must be unique.

   - **Field Type**: You can select either Text Field, Single Select or Multi Select. For Single Select or Multi Select, the Default can be set by selecting the checkbox next to the relevant List Item. There can be more than one default if the Field Type is Multi Select. If you switch the field type from single/multi select to text field, the item list specified is removed permanently if you submit that change.

   - **Activated**: Select the checkbox to mark the extended attribute as activated.

   - **Required**: Select the checkbox to mark the extended attribute as required.

4. Click **Save**.

Edit an Extended Attribute
You can edit the details of an extended attribute if any changes are required.

To edit an extended attribute

1. View Extended Attributes list and select the attribute you want to edit.

2. Click the **Edit** button. The **Edit Extended Attribute** window displays. This has all the details from the **New Extended Attribute** window.

3. Edit the extended attribute details.

4. Click **Save**.

Reorder an Extended Attribute

You can modify the order in which an extended attribute appears in the list of extended attributes.

To reorder an extended attribute

1. View Extended Attributes.
2. Click on the extended attribute to select it.
3. Click the **Up** or **Down** button. The extended attribute moves up or down in the list.

Note: This order is reflected in the course/session window.

Activate or Deactivate an Extended Attribute

You can activate or deactivate an extended attribute if required.

To deactivate an extended attribute

1. View Extended Attributes.
2. Click on an extended attribute to select it.
3. Click the **Deactivate** button. This deactivates the extended attribute.

Note: When an extended attribute is deactivated, you cannot use this attribute for any future course/sessions. However, this attribute remains the same for already associated courses/sessions.

To activate an extended attribute

1. View Extended Attributes.
2. Click on the deactivated extended attribute to select it.
3. Click the **Activate** button. This activates the extended attribute.

Note: Reactivating the extended attribute will bring the attribute to the course/session window.

Delete an Extended Attribute

You can delete an extended attribute if required. When you confirm the deletion, the system removes the extended attribute, as well as all of its instances throughout the system.

Note: An extended attribute cannot be deleted if the attribute is associated with a course/session until the respective course/session is deleted.

To delete an extended attribute

1. View Extended Attributes.
2. Click on the extended attribute you want to delete.
3. Click the **Delete** button. A confirmation box displays.

4. Click **Yes** to confirm.

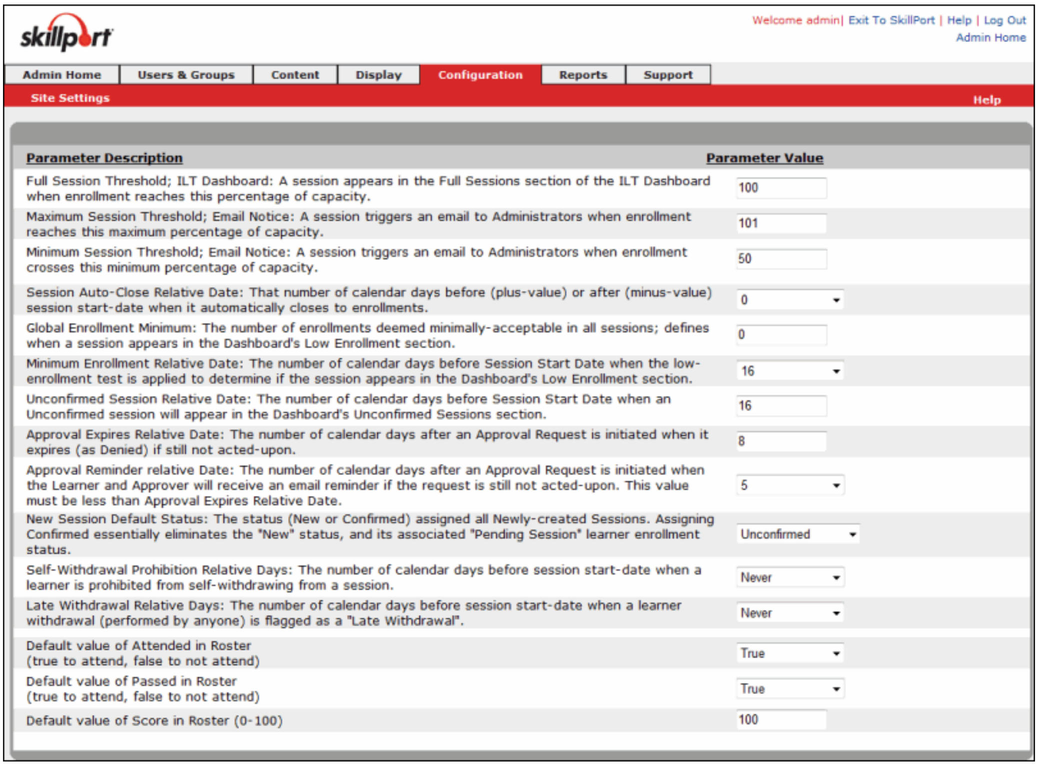
ILT Site Settings

If you have Company Admin privileges, you can access the Site Settings view, where you can configure some ILT site-specific settings for your company.

Note: This menu option is only available if ILT is enabled on the site.

To view the site settings

1. Log in to Skillport as an admin.
2. Click **Configuration > Features > ILT > Site Settings**. The Site Settings page displays.



3. Set the desired site settings:

Site Settings	Required Field?	Description	Value
Full Session Threshold; ILT Dashboard: A session appears in the Full Sessions section of the ILT Dashboard when enrollment reaches this percentage of capacity	yes	This controls when a session is listed in the "Sessions at or above Capacity" section of the Dashboard.	An integer between 0 and 100 (inclusive)

Maximum Session Threshold; Email Notice: An email is triggered when a session has enrollments above this percentage of capacity, then a withdrawal causes enrollment to go below this percentage of capacity	yes	The value selected is based on the value of the 'Full Session Threshold' field. When the session capacity reaches this specified percentage, an email is automatically sent to the Session Administrator detailing that the session is full. **Note**: This email is only sent to the Session Administrator, not the ILT Administrator. If no Session Administrator is assigned, then the email is not sent.	An integer between 101 and 300 (inclusive)
Minimum Session Threshold; Email Notice: A session triggers an email to Administrators when enrollment crosses this minimum percentage of capacity	yes	When a withdrawal from a full session results in the roster going below the minimum capacity, an email is sent to the Session Administrator. This email is sent based on very specific criteria: ▪ - The session is full. ▪ - The session is closed to enrollment. ▪ - A withdrawal results in a roster that is less than or equal to the percentage full designated by this field. **Note**: This email is only sent to the Session Administrator, not the ILT Administrator. If no Session Administrator is assigned, then the	An integer between 0 and 99 (inclusive)

		email is not sent.	
Session Auto-Close Relative Date: That number of calendar days before (plus-value) or after (minus-value) session start-date when it automatically closes to enrollments	no	This setting determines the number of days to automatically close a session before (positive number) or after (negative number) it is scheduled to begin. The value entered in this field controls the default value for the "Close session" field in a new course. The value can be changed at either the course or session level when creating them. Course level changes will not affect existing sessions, only new sessions. *For example*, if you want to close a session to further enrollments 2 days prior to the start of the session, select 2 from the drop-down list. If you want to close the session 2 days after the start of the session, select -2 from the drop-down list.	Never, 90, 60, 45, 30 through -30, -45, -60, -90 and is chosen from a drop-down box.

Global Enrollment Minimum: The number of enrollments deemed minimally-acceptable in all sessions; defines when a session appears in the Dashboard's Low Enrollment section	yes	When a session is at or below this value by the day specified in the "Display low-enrollment alert X days before session start" setting, the session is displayed in the Low Enrollment Sessions section of the Dashboard. The value entered in this field controls the default value for the “Minimum Enrollments” setting in a new course. The value can be changed at either the course or session level.	An integer between 0 - 99999 (inclusive)
Minimum Enrollment Relative Date: The number of calendar days before Session Start Date when the low-enrollment test is applied to determine if the session appears in the Dashboard's Low Enrollment section	no	This value determines how many days in advance of a session start date that a session must meet the minimum enrollment. If the session is at or below the minimum enrollment criteria on that day, then that session is in "low enrollment". The default minimum enrollment is defined in the Global default applied to all sessions defining the minimum number of enrollments desired. The value entered in this field controls the default value for the “Low Enrollment Alert” field in a new course. The value can be changed at either the course or session level.	Never or an integer between 0 and 31. The selection is chosen from a drop-down box. ▪ **Never**: There is no minimum enrollment requirement, and the session will never be listed in the Low Enrollment Sessions section of the Dashboard. ▪ **0 to 31**: Number of days prior to session start when low enrollment sessions are listed in the Low Enrollment Sessions section of the Dashboard.

Unconfirmed Session Relative Date: The number of calendar days before Session Start Date when an Unconfirmed session will appear in the Dashboard's Unconfirmed Sessions section	yes	This setting determines how many days in advance of the session start date to list an unconfirmed session in the Unconfirmed Sessions section of the Dashboard. When a learner enrolls in a session with an "Unconfirmed" status, they receive a confirmation email, but it does not include a calendar attachment. The learner's enrollment status is "Pending Session". After an administrator marks the session "Confirmed", all enrolled learners will receive another email noting that the status is now Confirmed, and that email will have the calendar attachment. Any learners who enroll after the session has been confirmed will receive an email with a calendar attachment. For more information on "Unconfirmed" and "Confirmed" see the "The default status for all newly created sessions". The setting provides a quick and easy method for an ILT Administrator to see which sessions are still "pending" (meaning they have a status of "Unconfirmed") and then take action to confirm the sessions. **Note**: If the Default status for all newly created sessions is changed to "Confirmed" and existing sessions have an "Unconfirmed" status, those sessions will appear in the Unconfirmed Sessions section until their status is changed to "Confirmed".	An integer between 0 and 99 (inclusive)

Approval Expires Relative Date: The number of calendar days after an Approval Request is initiated when it expires (as Denied) if still not acted-upon	yes	If a session requires approval (either Session Approval or Manager Approval), this setting determines the number of days that the approval request remains open. If the request is not acted upon during this period, it is automatically deleted and the learner is not enrolled. If an enrollment is not approved by this date, the approval request is deleted, an expiration notification is sent to the learner, and the learner is not enrolled in the session. If the learner still wishes to enroll, he or she must open the session and click "Enroll" again to initiate a new approval request.	An integer between 2 and 99 (inclusive)
Approval Reminder relative Date: The number of calendar days after an Approval Request is initiated when the Learner and Approver will receive an email reminder if the request is still not acted-upon. This value must be less than Approval Expires Relative Date	no	If a session requires approval (either by a Session Approver or Manager), this setting determines the number of days after an approval request is initiated to send a reminder email to the Approver or Approvers. This is only sent if the Approver has not taken action on the request.	n integer between 1 and 7, inclusive (and should be less than the Approval Expires Relative Date setting)
New Session Default Status: The status (New or Confirmed) assigned all Newly-created Sessions. Assigning Confirmed essentially eliminates the "New" status, and its associated "Pending Session" learner enrollment status	no	An organization can use the Unconfirmed status for sessions that may run, and the Confirmed status for sessions that will run.	Confirmed or Unconfirmed

Self-Withdrawal Prohibition Relative Days: The number of calendar days before session start-date when a learner is prohibited from self-withdrawing from a session	no	The value entered in this field controls the default value for the "Prohibit Self-Withdrawal" field in a new course. The value can be changed at either the course or session level.	Never, Always or a number between 1 and 31 (inclusive) ▪ **Never**: A learner can self-withdraw from the session at any time, even on the day that the session takes place. ▪ **Always**: A learner can never self-withdraw from a session. The withdraw button is removed from the session, and is replaced with the following text "You are enrolled in this session. To withdraw from this session, please contact your Training Manager." ▪ **1 to 31**: Number of days before the session start date that a learner can self-withdraw. When the prohibit self-withdrawal date is reached, the withdraw button is removed from the session and replaced with the following text: "You are enrolled in this session. To withdraw from this session, please contact your Training Manager."

Late Withdrawal Relative Days: The number of calendar days before session start-date when a learner withdrawal (performed by anyone) is flagged as a "Late Withdrawal"	no	The learner is still withdrawn, but his enrollment status is "late withdrawal". The value entered in this field controls the default value for the "Late Withdrawal" field in a new course. The value can be changed at either the course or session level.	Never or an integer from 1 to 31 (inclusive), chosen from a drop-down box ▪ **Never**: No withdrawals are ever flagged as a "late withdrawal". ▪ **1 to 31**: Number of days prior to session start date when a withdrawal is flagged as a "late withdrawal".
Default value of Attended in Roster (true to attend, false to not attend) -	no	Learners' Attended value is Null until the first time an authorized user enters Session Results. When entering Session Results for the first time, all enrolled Learners get their Attended values populated in the Site Settings. You can then edit changes if desired. When you mark the session as complete, if any Learners record still contains NULL values for Attended, a warning message appears. If any Learners are added to a session after it is marked complete, their Attended values are auto-populated with the defaults.	True or false

Default value of Passed in Roster (true to attend, false to not attend)	no	Learners' Passed value is Null until the first time an authorized user enters Session Results. When entering Session Results for the first time, all enrolled Learners get their Passed values populated in the Site Settings. You can then edit changes if desired. When you mark the session as complete, if any Learners record still contains NULL values for Passed, a warning message appears. If any Learners are added to a session after it is marked complete, their Passed values are auto-populated with the defaults.	True or false

Default value of Score in Roster (0-100) -	no	Learners' Score value is Null until the first time an authorized user enters Session Results. When entering Session Results for the first time, all enrolled Learners get their Score values populated in the Site Settings. You can then edit changes if desired. Scores are final when an authorized user marks the session as complete. When you mark the session as complete, if any Learner's record still contains NULL values for Score, a warning message appears. If any Learners are added to a session after it is marked complete, their Score values are auto-populated with the defaults.	An integer between 0 - 100 (inclusive)

1. Click **Submit** to save your ILT Site Settings.
2. Click **Reset** to revert to the previously saved settings.

Publisher

You can publish courses as well as passive content directly to your Skillport site by enabling the Skillsoft Publisher from within the Admin menu.

To configure Publisher

1. Click **Configuration > Features > Publisher** on the top navigation bar.
2. Configure the settings as needed:
   - **Enable Publisher** - Select **yes** to enable the Publisher option in the Admin menu. The default setting is no.
   - **Publisher URL** - The url of the Publisher site that is provided by Skillsoft.
   - **Allow seamless login for:**

Publisher - This check box is enabled by default. Clearing this option will hide the Publisher link on the **Content** tab.

Upload Passive Content - This check box is enabled by default. Clearing this option hides the Upload Passive Content link on the **Content** tab.

- **Publisher Company ID** - The company ID provided to you by Skillsoft. Maximum character limit is 50 characters.
- **Publisher URL Timeout** - The number of minutes that pass before Publisher times out due to inactivity. Characters are limited to numbers 0-9 and can be a maximum of three characters long.
- **Publisher Error Text** - The error message that appears when the Publisher application is not available. You can modify this text message to fit your company's needs. There is a 255 character limit for error message text.

3. Click **Submit** to save your changes, or click **Cancel** to return to the main Admin menu.
4. A message appears stating that your Publisher Settings have been updated. You can now view the Publisher options that you have enabled from the **Content** tab:
    - Skillsoft Publisher
    - Upload Passive Content

Completion Criteria

A course's completion status is checked when results are posted to the Skillport database. This typically occurs when a learner finishes a session and closes a course. The learner's results are compared to the course's completion criteria to determine the course's completion status. A course is either COMPLETE (the learner has met the criteria) or STARTED (the learner has started the course but not yet met the criteria).

You can define company-wide and course-specific completion criteria.

Completion Criteria Settings

You can configure the following completion criteria settings:

Existing Completions: When **Preserve existing completions** is selected, any existing course completions are frozen (marked to permanently maintain their status of COMPLETE) once your Skillport database is re-summarized. For more information, see ***Existing Completions*** on page 425.

Completion Criteria: Specify one of the following visitation criteria and, if desired, the minimum time duration.

- **Visitation**
    - **Achieve minimum test score OR visit all content pages**: Learners can satisfy the **Minimum test score** and scoring model criteria OR page through all topics, whichever comes first. This is the default setting for Standard courses.
    - **Achieve minimum test score AND visit all content pages**: Learners must satisfy the **Minimum test score** and scoring model criteria AND must page through all topics. This is the default setting for Compliance courses.

  - **Achieve minimum test score**: Content visitation is ignored. Learners must satisfy the **Minimum test score** and scoring model criteria.
  - **Visit all content pages**: Learners must page through all topics. The **Minimum test score** and scoring model criteria is ignored.
  - If the course cannot be completed because there are no assessments or because of passive content, do not specify **Achieve minimum test score AND visit all content pages** or **Achieve minimum test score**.
- **Minimum total time in course**: Specify the minimum time duration (in hours and/or minutes) the learner must spend in the course to achieve completion. The Hours value must be an integer between 0 and 99, and the Minutes value must be an interger between 0 and 59. The default value is blank (no minimum specified).

Configuration: Specify one or more of the following configuration options.

- **Minimum test score**: Specify the numeric score the learner must meet or exceed to complete a course, then select the scoring model from the drop-down list. The scoring model is the logic to apply when determining completion. There are 2 scoring models:
  - **Each Test** (lesson scoring): In order for the learner to complete the course, each lesson test must have a high score that meets or exceeds the value specified for **Minimum test score**.
  - **Average** (course scoring): In order for the learner to complete the course, the average of all lesson test scores must meet or exceed the value specified for **Minimum test score**. Tests that have not been attempted are scored as 0.

  As an example, assume you set **Minimum test score** to 80. A learner takes a course with 5 lessons and scores 100% on the first 4 lessons, but she doesn't attempt the last lesson test. If **Each Test** (lesson scoring) is being used, the course is considered incomplete because the learner did not get at least 80% on all lesson tests. However, if **Average** (course scoring) is being used, the course is marked as complete because the average of all lesson tests (100+100+100+100+0)/5 = 80, which meets the value specified for **Minimum test score**.

  Note: SkillSims ignore all completion criteria except **Minimum test score**. Even if you set the visitation completion criteria to **Visit all content pages**, SkillSims can only be completed by meeting the specified minimum score.

- **Maximum course test attempts**: Allows you to specify the maximum number of attempts allowed for a learner to take a course test; after the maximum attempts is reached, the learner can request a course retake. You can enter an integer value from 1 - 99, or leave the field blank (unlimited attempts).
- **Visit all content pages prior to test access**: When selected, prohibits the learner from directly accessing the test without first completing all the pages in the course.
- **Require users to complete all questions in each test**: If you select this option, all questions must be answered in all tests in order to complete a course. For Legacy courses, this option only applies when using **Average** (course scoring). This is because all tests are required by default for Legacy courses using lesson scoring. For CCA courses, this option applies when using either **Each Test** (lesson scoring) or **Average** (course scoring).
- **Disable forward navigation based on audio duration**: When selected, the forward navigation for course pages is not enabled until the audio portion of the current page has completed and prevents the audio portion from being muted.
- **Allow multiple completions**: Select this option to allow learners to restart a course that has already been started. This option will not be available if it has not been enabled on your site.

Note: After you make changes to completion criteria, you must call Skillsoft Technical Support and request that your Skillport database be **re-summarized**. This updates the completion criteria, updates the summary data for all applicable courses, and reevaluates learners' completion status on all applicable courses based on the new criteria.

However, if you do not want the changes to the completion criteria to affect learners who have already completed affected courses (based on the old completion criteria), first you must 1) freeze existing completions of the courses, and then 2) request that Skillsoft Technical Support re-summarize your Skillport database. Once this is done, you can change the completion criteria.

Set Global Completion Criteria

You can set global (company-wide) completion criteria that learners must meet in order to complete any course in the Skillport Library. You can specify separate completion criteria for Standard courses and for Compliance courses.

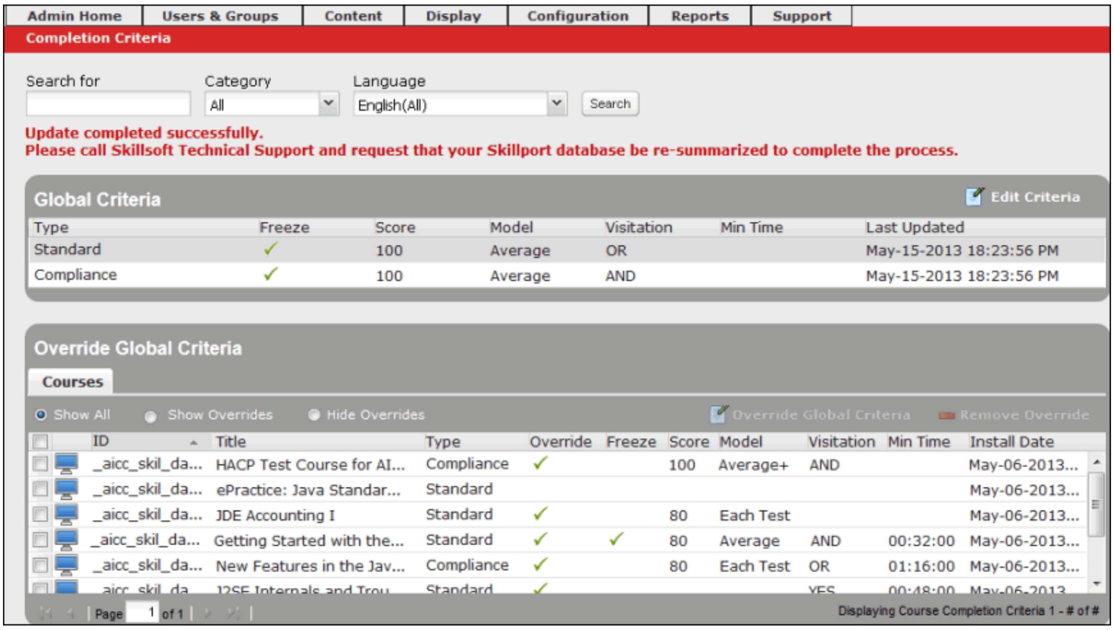
- A Standard course is any CCA course, excluding Business Impacts, Business Challenges, Test Preps, Assessment Only content, or compliance courses.
- A Compliance course is a CCA course that is marked as "compliance".

Note: If you have also set course-specific completion criteria for one or more courses, the course-specific criteria supersede the global criteria.

To set global completion criteria

1. Click **Configuration > Completion Criteria** on the navigation bar.

The Completion Criteria page displays.

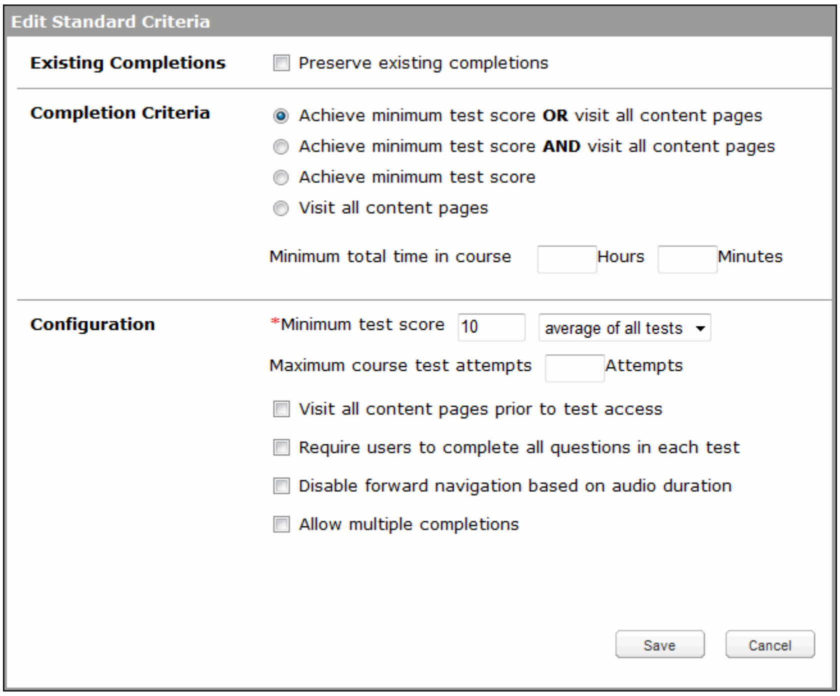


2. In the **Global Criteria** section, click either the **Standard** or **Compliance** course type.

3. Click **Edit Criteria**.

   The Edit Standard Criteria or the Edit Compliance Criteria dialog box displays, depending on the selected course type.

Note: The available criteria options are the same for both Standard and Compliance courses. However, the default completion criteria is different.



4. Change the completion criteria as needed. For help with this step, see ***Completion Criteria Settings*** on page 425.

5. Click **OK**.

6. Contact Skillsoft Technical Support and request that your company's database be re-summarized.

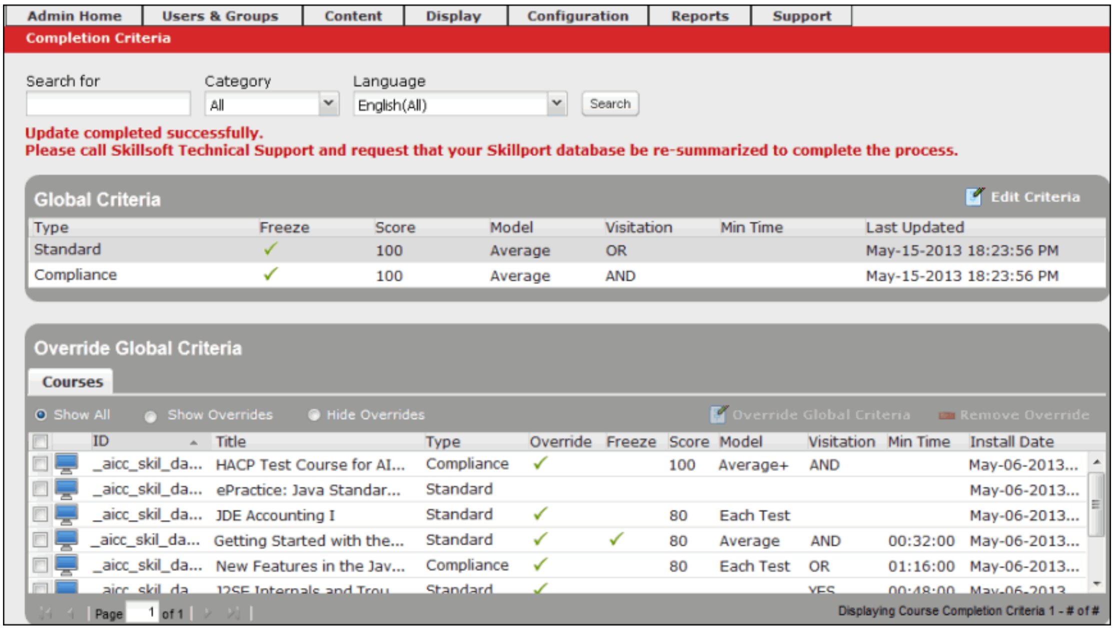
Set Course-Specific Completion Criteria

You can set course-specific completion criteria that learners must meet in order to finish one or more specific courses. Course-specific criteria overrides global criteria.

To set course-specific completion criteria

1. Click **Configuration > Completion Criteria** on the navigation bar.

   The Completion Criteria page displays.



Note: In the **Override Global Criteria** section, a ✓ (check mark) displays next to the ID for those courses that have course-specific completion criteria applied.

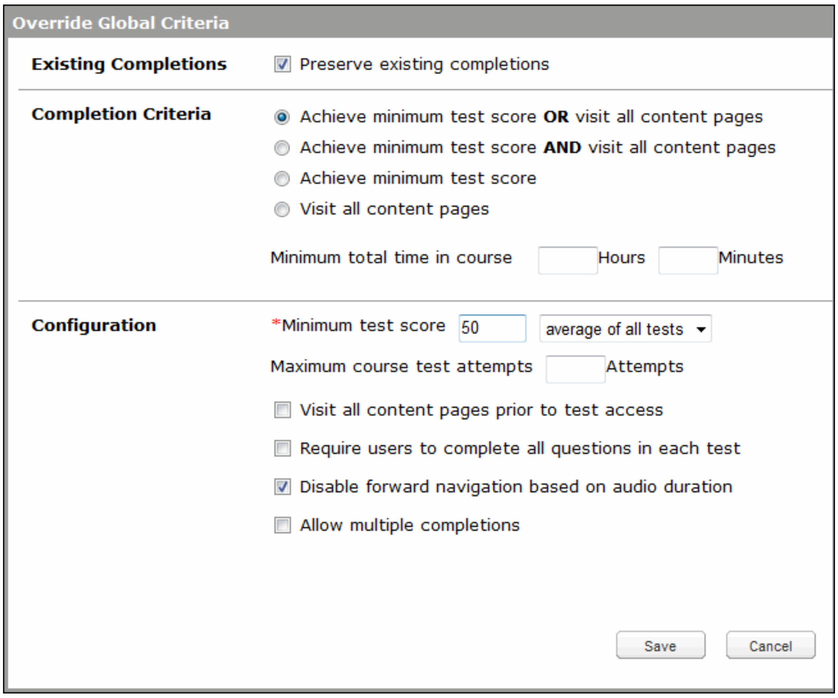
2. Locate the course (or courses) for which you want to specify course-specific completion criteria.

   You can use the sorting options in the **Override Global Criteria** section to locate the course. You can also use the search fields at the top of the page. Only search categories for asset types for which completion criteria can be set are shown.

3. Select the course or courses. To select multiple course, use **Ctrl+click** or **Shift+click**.

4. Click **Override Global Criteria**.

The Override Global Criteria dialog box displays.



5. Change the criteria as needed. For help with this step, see ***Completion Criteria Settings*** on page 425.

6. Click **Save**.

7. If there are existing course completions that have not yet been preserved (frozen), you are prompted to confirm that you want to change the criteria. Click **OK** to confirm, or click **Cancel** to discard the changes.

8. Contact Skillsoft Technical Support and request that your company's database be re-summarized.

To remove course-specific completion criteria

1. Click **Configuration > Completion Criteria** on the navigation bar.

   The Completion Criteria page displays.

2. Select the course or courses for which you want to remove course-specific completion criteria. To select multiple courses, use **Ctrl+click** or **Shift+click**.

3. Click **Remove Override**, and then click **OK**.

4. If there are existing course completions that have not yet been preserved (frozen), you are prompted to confirm that you want to change the criteria. Click **OK** to confirm, or click **Cancel** to discard the changes.

   The selected courses revert to using the defined global (company-wide) criteria.

5. Contact Skillsoft Technical Support and request that your company's database be re-summarized.

Completion Criteria Settings

Note: After you make changes to completion criteria, you must call Skillsoft Technical Support and request that your Skillport database be **re-summarized**. This updates the completion criteria, updates the summary data for all applicable courses, and reevaluates learners' completion status on all applicable courses based on the new criteria.

However, if you do not want to affect learners who have already completed affected courses (based on the old completion criteria), prior to changing the completion criteria you must 1) preserve existing completions of the courses, and 2) request that Skillsoft Technical Support re-summarize your Skillport database. Once this is done, you can change the completion criteria. You **cannot** preserve existing completions and change completion criteria at the same time.

The exception to the above is when you make a change to **only** the **Allow Multiple Completions** option. In this case, you do not need to have Skillsoft Technical Support re-summarize your database.

Existing Completions

When you select the **Preserve existing completions** option, any existing course completions are marked to permanently maintain their status of COMPLETE once your Skillport database is re-summarized.

You should select this option:

- if you intend to change the completion criteria of courses (for example, by raising or lowering the minimum test score), but you do not want the changes to impact users who have already completed affected courses based on the old criteria.
- when you are replacing one course with another from the catalog, but want to give credit to the users who have completed the original course.

Preserving existing completions is a permanent action; if you later disable the option (by clearing the check box), all completions that have been frozen are still marked as COMPLETE.

If you do not freeze existing completions, when Skillsoft Technical Support re-summarizes your database, all existing completions are reevaluated based on the new criteria. This can result in the completion status changing from COMPLETE to STARTED for some learners.

Example

Consider the following scenario:

1. You set the company-wide completion criteria as follows:
   - **Minimum test score** = 75
   - Scoring Model = **Average** (course scoring)
   - Content visitation = **Achieve minimum test score**
   - **Preserve existing completions** = disabled (not checked)
2. Learner A ends a course session for Course X, and a score of 80 is reported to Skillport. The course is marked as COMPLETE based on the defined criteria.

3. You change the value for **Minimum test score** to 85 and have Skillsoft Technical Support re-summarize your database.
4. When the database is re-summarized, the completion status for Course X is reevaluated based on the new criteria. Learner A's score does not meet the minimum test score, so her course completion status is changed to STARTED.
5. You change the value for **Minimum test score** back to 75 and have Skillsoft Technical Support re-summarize your database.
6. When the database is re-summarized, the completion status for Course X is reevaluated based on the new criteria. Learner A's score exceeds the minimum test score, so her course completion status is changed to COMPLETE.
7. You select **Preserve existing completions**, click **Save**, and have Skillsoft Technical Support re-summarize your database.
8. When the database is re-summarized, Learner A's completion of the course is frozen, that is, it is permanently marked as COMPLETE.
9. You change the value for **Minimum test score** to 90 and have Skillsoft Technical Support re-summarize your database.

When the database is re-summarized, even though Learner A's score does not meet the new completion criteria, her completion status remains unchanged because her completion for Course X has been frozen.

Existing Completions for Compliance Content

For detailed information about Compliance, see Recurring Assets (Compliance).

If a learner has already completed an asset that is now marked as a compliance asset, that learner can get compliance credit for the asset if both the **First Accessed** and **Completed** dates are within the asset's designated previous recurrence period (the effective assignment date to the recurrence period).

Example for Existing Completions for Compliance

The *Leadership Basics* course is a mandatory course for a certain group of learners (Leadership Candidates). You assign the Leadership Basics course on June 15, 2013 with a recurrence period of one year.

On August 1, 2013, you add two new learners to the Leadership Candidates group:

- Joe has already taken the *Leadership Basics* course, and he accessed and completed it on June 25, 2013. Because he started and completed it within the last year (August 1, 2012 - August 1, 2013), he is not required to complete this asset in the initial period. Joe receives compliance credit.
- Mike has also taken the *Leadership Basics* course, and he first accessed it on June 25, 2012. Mike completed the course on July 1, and because he did not complete it within the last year (August 1, 2012 - August 1, 2013), he is required to complete this asset in the initial period. Mike does not receive compliance credit until he has completed the asset within the initial period.

Recurring Compliance Courses

Credit is given for the initial assignment only. Compliance credit is not granted with prior completions for the next recurrence.

Example of Recurring Compliance Courses

All employees must successfully pass the *Sexual Harassment Awareness* course once per fiscal year to remain in compliance with an organization's internal goals. The *Sexual Harassment Awareness* course is open yearly from February 1 - January 31 of the following year (for example, Feb 1, 2013 - Jan 31, 2014).

A new hire, Paul, begins work on January 25. He takes the *Sexual Harassment Awareness* course on January 30. When the assignment reappears in his learning plan on February 1, he wants credit for already taking the course. He is not granted compliance credit, as it is a recurring course for company-wide yearly compliance.

Completion Criteria

The Completion Criteria settings in the Edit Standard Criteria and Edit Compliance Criteria dialog boxes include the following:

- **Visitation**
  - **Achieve minimum test score OR visit all content pages**: Learners can satisfy the **Minimum test score** and scoring model criteria OR page through all topics, whichever comes first. This is the default setting for Standard courses.
  - **Achieve minimum test score AND visit all content pages**: Learners must satisfy the **Minimum test score** and scoring model criteria AND must page through all topics. This is the default setting for Compliance courses.

- Achieve minimum test score: Content visitation is ignored. Learners must satisfy the **Minimum test score** and scoring model criteria.
- **Visit all content pages**: Learners must page through all topics. The **Minimum test score** and scoring model criteria is ignored.
- If the course cannot be completed because there are no assessments or because of passive content, do not specify **Achieve minimum test score AND visit all content pages** or **Achieve minimum test score**.

- **Minimum total time in course**: Specify the minimum time duration (in hours and/or minutes) the learner must spend in the course to achieve completion. The Hours value must be an integer between 0 and 99, and the Minutes value must be an interger between 0 and 59. The default value is blank (no minimum specified).

Configuration

The Configuration settings in the Edit Standard Criteria and Edit Compliance Criteria dialog boxes include the following:

- **Minimum test score**: Specify the numeric score the learner must meet or exceed to complete a course, then select the scoring model from the drop-down list. The scoring model is the logic to apply when determining completion. There are 2 scoring models:
  - **Each Test** (lesson scoring): In order for the learner to complete the course, each lesson test must have a high score that meets or exceeds the value specified for **Minimum test score**.
  - **Average** (course scoring): In order for the learner to complete the course, the average of all lesson test scores must meet or exceed the value specified for **Minimum test score**. Tests that have not been attempted are scored as 0.

  As an example, assume you set **Minimum test score** to 80. A learner takes a course with 5 lessons and scores 100% on the first 4 lessons, but she doesn't attempt the last lesson test. If **Each Test** (lesson scoring) is being used, the course is considered incomplete because the learner did not get at least 80% on all lesson tests. However, if **Average** (course scoring) is being used, the course is marked as complete because the average of all lesson tests (100+100+100+100+0)/5 = 80, which meets the value specified for **Minimum test score**.

  Note: SkillSims ignore all completion criteria except **Minimum test score**. Even if you set the visitation completion criteria to **Visit all content pages**, SkillSims can only be completed by meeting the specified minimum score.

- **Maximum course test attempts**: Allows you to specify the maximum number of attempts allowed for a learner to take a course test; after the maximum attempts is reached, the learner can request a course retake. You can enter an integer value from 1 - 99, or leave the field blank (unlimited attempts).
- **Visit all content pages prior to test access**: When selected, prohibits the learner from directly accessing the test without first completing all the pages in the course.
- **Require users to complete all questions in each test**: If you select this option, all questions must be answered in all tests in order to complete a course. For Legacy courses, this option only applies when using **Average** (course scoring). This is because all tests are required by default for Legacy courses using lesson scoring. For CCA courses, this option applies when using either **Each Test** (lesson scoring) or **Average** (course scoring).

  When this option is selected, either **Average +** or **Each Test +** displays in the Model column in the Override Global Criteria list.
- **Disable forward navigation based on audio duration**: When selected, the forward navigation for course pages is not enabled until the audio portion of the current page has completed and prevents the audio portion from being muted.
- **Allow multiple completions**: Select the option to allow learners to restart a course that has already been started.

Course Restart (Course-Specific Only)

If you have courses that learners need to complete on a recurring basis, you can select the **Allow Multiple Completion** option to partially automate the creation of new progress records for learners:

- If you select this option, a learner can launch his most recent completion of the course for the purpose of restarting or continuing the course. Restarting the course creates a new record in the Learner Transcript that counts toward the next completion. Continuing the course allows the learner to re-enter the last completion with the goal of changing and improving its score. Immediately after the learner launches the last completion, he is prompted to choose whether to restart or continue the course.

  Be aware that if the Enable Forced Restart web site switch is set to **Yes**, and you set this setting for a course, learners can still launch the most recent completion. However, this automatically creates a new record in the Learner Transcript that counts toward the next completion. In other words, learners must restart the course; they are not given the option to continue (re-enter) the last completion.
- If you do not select this option, a learner can still launch his initial completion of the course. However, doing so only allows the learner to re-enter the initial completion for the purpose of improving its score. The learner cannot create another completion record.

Note: Unlike when you change a course's completion criteria, when you make a change to **only** the **Allow Multiple Completion** option, you do not need to have Skillsoft Technical Support re-summarize your database.

For more information on assets that can be restarted, see Assets That Learners Can Restart.

Notification Management

Getting Started with Notification Management

Emails and Email Templates

Many events that occur as learners and managers use Skillport to manage online learning result in email notifications being sent by the system. For example, a learner can configure a Learning Plan assignment so that she is emailed a reminder notice before its due date. As another example, if a learning program is configured to require approval to enroll, the learner's manager can receive a reminder notice to approve or deny the request.

By default, most of the events that trigger email notifications are set up to use a system email template. The system email templates are provided with your Skillport site. You can view them on the Notification Management page, but you cannot edit them. However, if desired, you can create custom templates and assign your custom templates to the events instead.

There are a handful of events that trigger emails that are not available on the Notification Management page. You cannot customize these emails, but in some cases you can configure the system not to send them. For more information, see ***Non-Customizable Emails*** on page 432.

Email Recipients

- A recipient in the **To**, **CC**, or **BCC** field receives one copy of an email.
- A recipient in the **To** and **CC** fields can see all other recipients in only those 2 fields.
- A recipient in the **BCC** field can also see all recipients in the To and CC fields. In addition, she can see herself—and only herself—in the BCC field.

Advanced Group Support

If your site is set up to support advanced groups, you can customize the notification management system both at the site level and at the advanced group level.

To make customizations that are applied to the overall site, before making any changes, make sure that no advanced group is set current in Skillport Administrator. To make customizations that are unique to a specific advanced group, before making any changes, set current that advanced group.

Note: When you create an advanced group, by default its Skillport events are assigned the system email templates. Any custom templates that you create and apply at the site level are **not** inherited by the advanced group. You must make the same customizations to the advanced group, or you can make different ones if desired.

Non-Customizable Emails

The following emails sent by Skillport are not available on the Notification Management page because you cannot customize their contents. These emails are always sent in U.S. English to recipients.

Login

A user forgets her user ID and requests for it to be sent via email.

Recipient

The user who made the request.

Can the email be turned off?

No. The user receives her user ID through this email. You can disable this feature; contact your Skillsoft representative for more information.

Email text

Subject:

```
User Id Request
```

Body:

```
User Ids for address <user's email address>

LastName                 FirstName                UserId

<user's last name>       <user's first name>      <user's user ID>
```

A user forgets her password and requests that a new one be sent via email.

Recipient

The user who made the request.

Can the email be turned off?

No. The user receives her password through this email. You can disable this feature; contact your Skillsoft representative for more information.

Email text

Subject:

```
Password Request
```

Body:

```
Your new password is : <password>
```

Reporting

A scheduled report is run automatically by the system.

Recipient

The administrator who created the schedule.

Can the email be turned off?

Yes. Open the report's schedule for editing, and clear the Email Notification check box.

Email text

Subject:

```
Your scheduled SkillPort report is complete
```

Body:

```
The following SkillPort report has been completed.

Schedule Name:          <name of schedule>

Schedule Description:   <description of schedule>

Time Completed:         <YYYY-MM-DD HH:MM:SS>

Please log into your SkillPort site to retrieve the report. It is in the
Results tab in the Reports section.
```

An administrator manually runs (previews) a report, and when saving the result, she selects to be notified via email when the report is completed.

Recipient

The administrator who ran the report.

Can the email be turned off?

Yes. When you save the report, do not select the Email Notification check box on the **Email** tab in the Save Result dialog box. (It is cleared by default.)

Email text

Subject:

```
Your SkillPort report is complete
```

Body:

```
The following SkillPort report has been completed.

Name:             <name of schedule>

Description:      <description of schedule>

Time Completed:   <YYYY-MM-DD HH:MM:SS>

Please log into your SkillPort site to retrieve the report. It is in the
Results tab in the Reports section.
```

Send Email

An administrator sends an email using the Send Email page that is accessed by clicking **Users & Groups > Send an Email** on the navigation bar.

Recipient

The administrator who sent the email.

Can the email be turned off?

No.

Email text

Subject:

```
Email Sent
```

Body:

```
Your email "<the subject you specified in your email>" has been sent.

The following users do not have email addresses configured and did not
receive your email:

<user A's last name>,<user A's first name>

<user B's last name>,<user B's first name>
```

Notification Management Workflow

To customize the notification system to meet your organization's needs, follow this recommended workflow:

1. View the events that trigger emails.
2. Deactivate the emails that you do not want to be sent, and activate the emails that you do want to be sent. Most emails are activated by default, but a few are not.
3. ***View the system templates*** on page 449 that are assigned to the emails that you do want to be sent.
4. If you require any changes, create custom templates to use instead of the system templates.
5. Assign the custom templates to the appropriate emails.

Instructor Led Training (ILT) Emails

This section provides information on the Instructor Led Training (ILT) **emails** that are sent by Skillport to learners and administrators. For in-depth information on ILT in general, see Instructor Led Training.

Types of ILT Emails
If your site supports Instructor Led Training (ILT), then your ILT administrators, approvers, managers, and instructors work with 3 types of emails:

- User-initiated emails
- Optional, event-driven emails
- Automatic, event-driven emails

Tip: To view these events easily, change the filtering on the Feature column on the Manage Emails page, so that only the ILT events are displayed.

User-Initiated Emails

There are 2 places in Skillport in which you can send an ILT email on demand for any reason:

- When you view a course's information, you can click the **Email** button to email
  - The course administrators assigned to the course
  - The learners on the course's watch list
- When you view a session's information, you can click the **Email** button to email
  - The session administrators assigned to the session
  - The instructor assigned to the session
  - The learners enrolled in the session

In user-initiated emails, you cannot change the body of the email, but you can change its subject line. You can also specify additional recipients in the CC and BCC fields. These recipients do not need to have Skillport accounts; in other words, you can specify them by their external email addresses.

Note: You cannot disable the ILT events that support these user-initiated emails.

Optional, Event-Driven Emails

When one of the following events occurs, you are prompted by the system to send an email if desired:

- Course Activated
- Course Updated
- Course Removal
- Session Created
- Session Updated (You are prompted to optionally send this email if 1) the session status is not "Confirmed," and 2) the calendar object-related information hasn't changed.)
- Session Deleted
- Session Confirmed (This email does not include an iCalendar object.)
- Enrollment Withdrawal Notification

In optional, event-driven emails, you cannot change the subject or the body. However, like for user-initiated emails, you can specify additional recipients in the CC and BCC fields. These recipients do not need to have Skillport accounts; in other words, you can specify them by their external email addresses.

Automatic, Event-Driven Emails

All of the other ILT-related events that trigger emails to be sent by Skillport do so *automatically*. You cannot disable these emails on a per email basis. However, you can deactivate the event so that it never triggers any emails to be sent.

Calendar Objects

When calendar-related information regarding a session changes (for example, the date, time or location), an iCalendar attachment (.ics file) is sent with the ILT email. This allows the learner to easily update his or her Microsoft Outlook calendar accordingly.

Deactivating Emails

You can deactivate all ILT emails except for the following user-initiated emails:

- Ad Hoc Email to a Course Watch List
- Notify All Enrolled and Waitlisted Learners in a Session

These emails always remain active because they support the **Email** buttons on the pages that display course and session information.

Support for Multiple Languages

Multiple Language Support - ILT Emails

Multiple language support for Instructor Led Training (ILT) emails works as follows:

- A course-related or session-related email is sent to **all** recipients in the language specified in the course's information if that language is one of the languages supported by the Skillport application. (All sessions inherit the language of the parent course.) For the list of languages supported by Skillport, see ***Language Support*** in the System Requirements.
- If a course specifies a language that is **not** supported by Skillport, the email is sent to **all** recipients in the default language used by your Skillport site.
- Users can override Skillport's default language by specifying a different language in the Default Site Language setting in his or her profile. However, unlike for non-ILT emails, this profile setting does **not** play a role in determining the language in which ILT emails are sent.
- User-Initiated and Optional, Event-Driven Emails: Because these 2 types of emails are not sent automatically by the system, you have the option of adding a personal message **in any language** to the body of the email before you send it. For an introduction to these emails, see Types of ILT Emails.

Multiple Language Support - All Other Skillport Emails

Multiple language support for Skillport emails except ILT emails works as follows:

- If an email recipient has not overridden Skillport's default site language, the recipient receives emails in that site language.
- If the recipient has overridden Skillport's default site language by specifying a different language in the Default Site Language setting in his or her profile, the recipient receives emails in the language specified in his or her profile.
- The exceptions to the above are:
  - Non-customizable emails

    These are sent in U.S. English.
  - Emails to new users created ***manually*** on page 31, via batch upload, and via self-registration

    The default site language of your Skillport site determines which language-specific template is used to send emails.
  - Emails to existing users for whom approval managers are changed (manually or via batch upload) or deleted (manually)

    The default site language of your Skillport site determines which language-specific template is used to send emails.
  - Emails sent via the Send Email page

    The default site language of your Skillport site determines which language-specific template is displayed on the Send Email page. However, you can change both the subject and body, entering text in any desired language.
  - Emails containing previewed templates

The default site language of your Skillport site determines which language-specific "Preview Template" is displayed and is used to send the email. However, you can enter the subject and an optional, personal message in any desired language before sending the email. The language of the *read-only, example email* depends on which language-specific template you selected to preview.

- Optional emails regarding learning Plan assignments

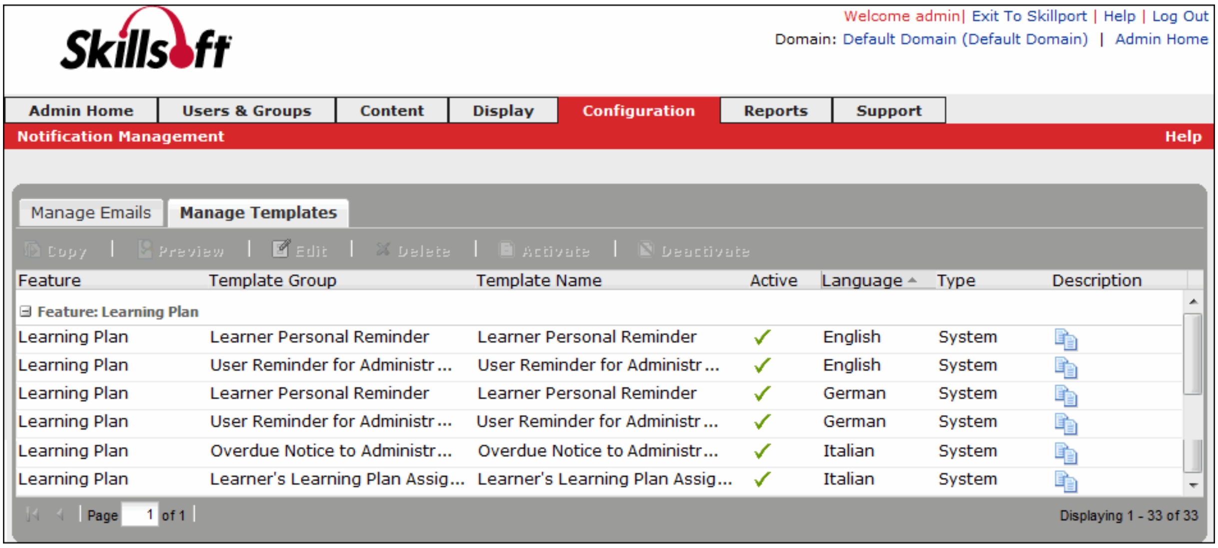
  If your Skillport site is configured to do so, you are prompted to choose whether to send an email to learners when you make a change (addition, update, or removal) to their assignments in their learning plan. As is the case with most Skillport emails, if an email recipient has not overridden Skillport's default site language, the recipient receives the email in that site language. Alternatively, if the recipient has overridden Skillport's default site language by specifying a different one in the Default Site Language setting in her profile, the recipient receives the email in the language specified in her profile. However, when you send the email, you can also enter an optional, personal message in any desired language.

Working with Email Templates

When you initially view the email templates on the **Manage Templates** tab, by default you only see the system templates in the default site language specified for your Skillport site. A system template is provided in each language supported by Skillport. You can view the templates in additional languages by ***changing the filter on the Language column*** on page 15.

Note: The filters you apply are not preserved once you log out of Skillport.

As an example, in the following image, the filter on the Language column is configured to display the templates in three languages: German, Italian, and English.



If you intend to support email notifications in multiple languages, before you begin working on the **Manage Templates** tab, change the filter on the **Language** column so that the templates for all applicable languages are displayed and accessible to you. This allows you to make the same customizations in all languages.

Language-specific filtering is not available on the **Manage Emails** tab. On that tab, the templates in all languages that are assigned to a given event are always shown.

Managing Emails

Skillport Events

This topic provides information on most of the Skillport events that can trigger notification emails. All of the events discussed here are shown on the Notification Management page.

The recipients of an email are determined by the variables specified in the recipient fields (the To, Cc, and Bcc fields) in the assigned template. For information on the available variables for each template, see ***Variables*** on page 461.

Note: There are also a few emails that are not available on the Notification Management page because you cannot customize their contents; for information on these, see ***Non-Customizable Emails*** on page 432.

Development Plan

Development plans:

- **Development Plan Approval Request by Learner**: A learner requests approval for a change to his or her development plan.
- **Development Plan Request Approved by Manager**: A manager approves a learner's request for a change to his or her development plan.
- **Development Plan Request Denied by Manager**: A manager denies a learner's request for a change to his or her development plan.

Learning events:

- **Learning Event Approval Request by Learner**: A learner requests approval for a learning event.
- **Learning Event Approval Request Approved by Manager**: A manager approves a learner's request for a learning event.
- **Learning Event Approval Revoked by Manager**: A manager revokes approval of a learning event.
- **Learning Event Request Denied by Manager**: A manager denies a learner's request for a learning event.

Instructor Led Training

Ad Hoc Email to a Course Watch List: An administrator with rights to a course's watch list manually sends an email to the members via the View Course page.

Approval for Enrollment Request by Learner: A learner requests approval to enroll in an ILT course.

Course Activated: An ILT course is activated.

Course Removal: An ILT course is deactivated or deleted.

Course Updated: Any attribute of an ILT course is updated.

Enrollment Request Approved by Administrator: An ILT administrator who has administrator rights to the session—instead of an approval manager or the session's session approver—approves a learner's request for enrollment. A template assigned to this event can be sent to the learner's approval manager and the session's session approver.

Enrollment Request Approved by Administrator/Approver: An ILT administrator who has administrator rights to the session, an approval manager, or the session's session approver approves a learner's request for enrollment. A template assigned to this event can be sent to the learner whose request was approved.

Enrollment Request Awaiting Approval: A number of days pass since an approver (the learner's approval manager and/or the session's session approver) was notified of the learner's request to enroll, but the request has not yet been granted or denied. This event triggers an email after the number of days specified in the Approval Reminder Relative Date setting on the Site Settings ILT page.

Enrollment Request by Learner: Both the approval manager and a session approver must approve a learner's enrollment in an ILT course, and only one has done so. This event triggers an email after the number of days specified in the Approval Reminder Relative Date setting on the Site Settings ILT page.

Enrollment Request Denied by Administrator: An ILT administrator who has administrator rights to the session—instead of an approval manager or the session's session approver—denies the learner's request to enroll. A template assigned to this event can be sent to the learner's approval manager and the session's session approver.

Enrollment Request Denied by Administrator/Approver: An ILT administrator who has administrator rights to the session or an approver (the learner's approval manager and/or the session's session approver) denies the learner's request to enroll. A template assigned to this event can be sent to the learner whose request was denied.

Enrollment Status Change Notification: A learner's enrollment status in a session is changed.

Enrollment Withdrawal Notification: An ILT administrator who has administrator rights to the session or the session's instructor withdraws a learner from a session.

Instructor Change Notification: An instructor for a session is changed.

Notify All Enrolled and Waitlisted Learners in a Session: An administrator who has administrator rights to a session's enrolled and waitlisted learners manually emails those learners via the View Session page.

Request for Enrollment Expired: A learner's request to enroll in a session expires because it was not granted or denied in a specified number of days. This event triggers an email after the number of days specified in the Approval Expires Relative Date setting on the Site Settings ILT page.

Session Cancelled: A session is cancelled.

Session Closed: A session is closed to additional enrollments. A template assigned to this event can be sent to the learners for whom enrollment requests are still pending approval, the approval managers for those learners, the learners on the session's wait list, and the session's session approver.

Session Closed - Roster Listing: A session is closed to additional enrollments. A template assigned to this event can be sent to the session's instructor and session administrators.

Session Confirmed: A session is confirmed.

Session Created: A session is created.

Session Deleted: A session is deleted.

Session Enrollment Limit: The session's enrollment has 1) reached minimum capacity, or 2) reached maximum capacity. Note that the first condition (the session's enrollment has reached minimum capacity) is determined by the session's enrollment and the value specified in the Minimum Session Threshold setting setting on the Site Settings ILT page.

Session Re-opened for Enrollment: The session is reopened for enrollments.

Session Seats Become Available - Watch List: The following criteria has been met: Session is at or over maximum capacity, one or more withdrawals has occurred (taking it below capacity), and its parent course has a watch list.

Session Updated: Any attribute of a session is updated.

Learning Program

Enrollment Approval by Manager: An approval manager or administrator approves a learner's request to enroll in a learning program.

Enrollment Approval Request: A learner requests approval to enroll in a learning program.

Enrollment Denial - Automated to Learner: A learner's request to enroll in a learning program is automatically denied because it was not handled by an approver within a specified number of days (by default, 8).

Enrollment Denial - Automated to Manager: A learner's request to enroll in a learning program is automatically denied because it was not handled by an approver within a specified number of days (by default, 8).

Enrollment Request Denied by Manager: An approval manager or administrator denies a learner's request to enroll in a learning program.

Learner Withdrawal: An administrator withdraws a learner or a group in which the learner is a member from a learning program.

If you activate emails for this event, after you withdraw a user or group from a learning program (using either the User Management page or the Enrollments and Waivers page), you are prompted to choose whether to send a notification email.

Learner Enrollment Request Withdrawal: A learner withdraws his or her request to enroll in a learning program.

Learning Program Enrollment: An administrator enrolls a learner or a group in a learning program, or an administrator approves a learner's request to enroll in a learning program.

If you activate emails for this event, after you ***enroll a user or group*** on page 176 in a learning program (using either the User Management page or the Enrollments and Waivers page), you are prompted to choose whether to send a notification email.

Learning Program Status Change: An administrator withdraws a group from a learning program, and a learner in that group previously requested approval to enroll as an individual in that learning program. This event also triggers the Pending Approval - Learner Reminder event.

Pending Approval - Learner Reminder: A specified number of days (by default, 5) pass since a learner's approval manager was notified to approve or deny the learner's request to enroll in a learning program.

Pending Approval - Manager Reminder: A specified number of days (by default, 5) pass since an approval manager was notified to approve or deny a learner's request to enroll in a learning program.

Learning Plan

Completion of Course: A learner completes a course in Learning Plan.

Learner Personal Reminder: A learner's personal reminder for taking a Learning Plan course is triggered.

Learner's Learning Plan Assignment Updated by Administrator: An administrator adds, updates, or removes a Learning Plan assignment.

If you activate emails for this event, the Preview Email Template dialog box appears after you save a change to a user's or group's Learning Plan assignments. This allows you to choose whether to send a notification email regarding the change.

Overdue Notice to Administrator: The due date of an asset assigned to a learner's Learning Plan by an administrator has passed. By default, this event triggers an email when the asset becomes overdue and, thereafter, every 7 days.

Overdue Notice to User: The due date of an asset assigned to a learner's Learning Plan by an administrator passes. By default, this event triggers an email when the asset becomes overdue and, thereafter, every 7 days.

Pending Due Notice: The due date of an asset assigned to a learner's Learning Plan by an administrator is approaching. By default, this event triggers an email when the due date is less than 14 days (2 weeks) away and, thereafter, weekly.

User Reminder for Administrator-assigned Courses: A learner's reminder for taking a Learning Plan course—which was set by the administrator who assigned the asset—is triggered.

Waiver Approval Request by Learner: A learner requests a waiver for a course in Learning Plan.

Waiver Request Approved by Manager: An approval manager or administrator approves a learner's waiver request for a Learning Plan assignment.

Waiver Request Denied by Manager: An approval manager or administrator denies a learner's waiver request for a Learning Plan assignment.

Waiver Revoked by Manager: An approval manager or administrator revokes a waiver for a learner's Learning Plan assignment.

Note: If you activate the emails sent due to Learning Plan-related events, be sure to set the Allow Learning Plan Reminders setting to Yes. That setting exposes the reminder-related settings in the Learning Plan dialog boxes.

Also be aware that neither changes to learner's Development Plan folders nor changes to learning events in Learning Plan trigger any of the Learning Plan emails described above.

Notifications

Preview Template: An administrator previews an email template (by clicking the **Preview** button) and sends the example email to herself and/or other recipients.

User Management

Ad-hoc Email: An administrator sends an email to a selection of users and/or groups via the Send Email page. If you deactivate emails for this event, the controls on that page are disabled to prevent users from sending emails using it.

Approval Manager Deletion: The approval manager assigned to a learner is deleted.

If you activate emails for this event, the "Approval Manager Change" check box is enabled on the Edit User dialog box when you *delete* the approval manager, which means you can choose at that time whether to send the notification email (by selecting or clearing the check box).

Approval Manager Updated: A learner's assigned approval manager is changed.

If you activate emails for this event, the "Send approval manager email to updated user" check box is enabled on the Batch Add/Update page and the "Approval Manager Change" check box is enabled on the Edit User dialog box when you *change* the approval manager, which means you can choose at that time whether to send the notification email (by selecting or clearing the check box).

New User Notification: An administrator creates a new user manually or via the Batch Add/Update page; or a learner self-registers, and approval by an administrator is not required because the user has an allowed email suffix (specified on the Self-Registration page).

If you activate emails for this event, the "Send Welcome email" check box is enabled in the ***New User dialog box*** on page 31 and on the Batch Add/Update page, which means you can choose at that time whether to send the notification email (by selecting or clearing the check box).

Self-registration Approved by Administrator: An administrator approves a learner's request to self-register as a Skillport user.

Self-registration Confirmation: A learner self-registers as a Skillport user, but it must be approved by an administrator.

Self-registration Denied by Administrator: An administrator denies a learner's request to self-register as a Skillport user.

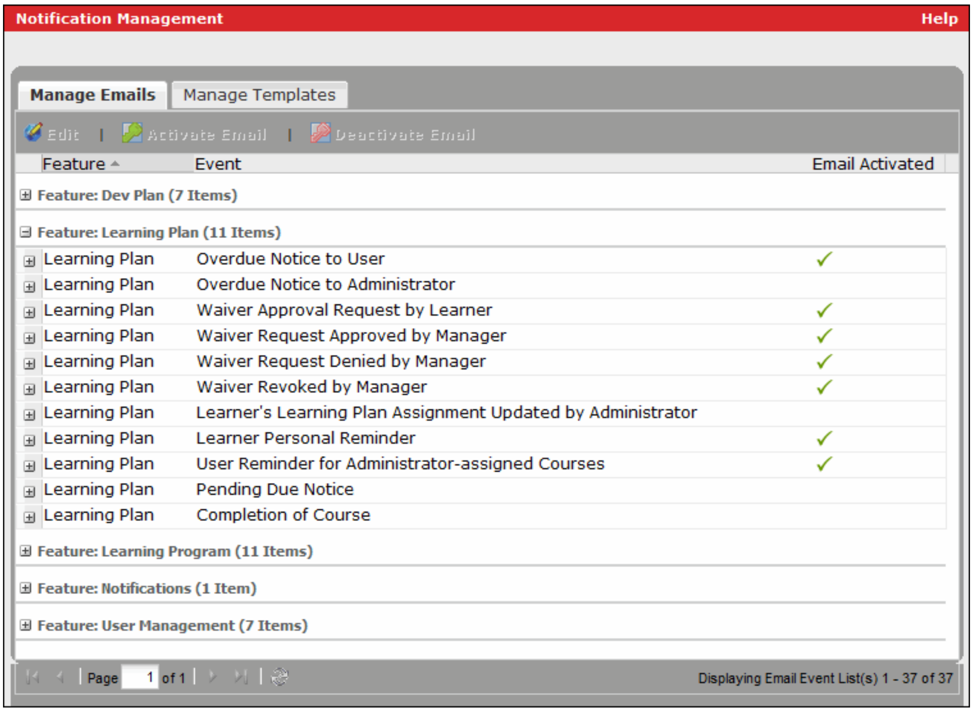
View the Events That Trigger Emails

Most of the events that trigger emails to be sent by Skillport to learners, administrators, and approval managers are exposed in the Administrator UI. This allows you to disable the emails that you do not want to be sent and, if required, to customize those that you do.

To view the events that trigger emails

1. Click **Configuration > Notification Management** on the navigation bar.

   The Manage Templates page displays, with the **Manage Emails** tab shown by default. This tab groups the events by major feature area and indicates if the email triggered by the event is activated.

2. Use the **Manage Emails** tab to:

   - Filter and sort the columns to change the information that is displayed. As an example, you can apply a filter to the Feature column to display just Learning Plan events so you can work easily with them. For help with filtering and sorting, see ***Manage Information in Tables*** on page 15. Note that filtering by language is not supported; the templates in all languages that are assigned to an event are always shown.

   - Identify which emails are activated (that is, are sent when the corresponding event occurs) and activate or deactivate an email if desired.

   - Identify which email template is used for an email and, if desired, change the email template.

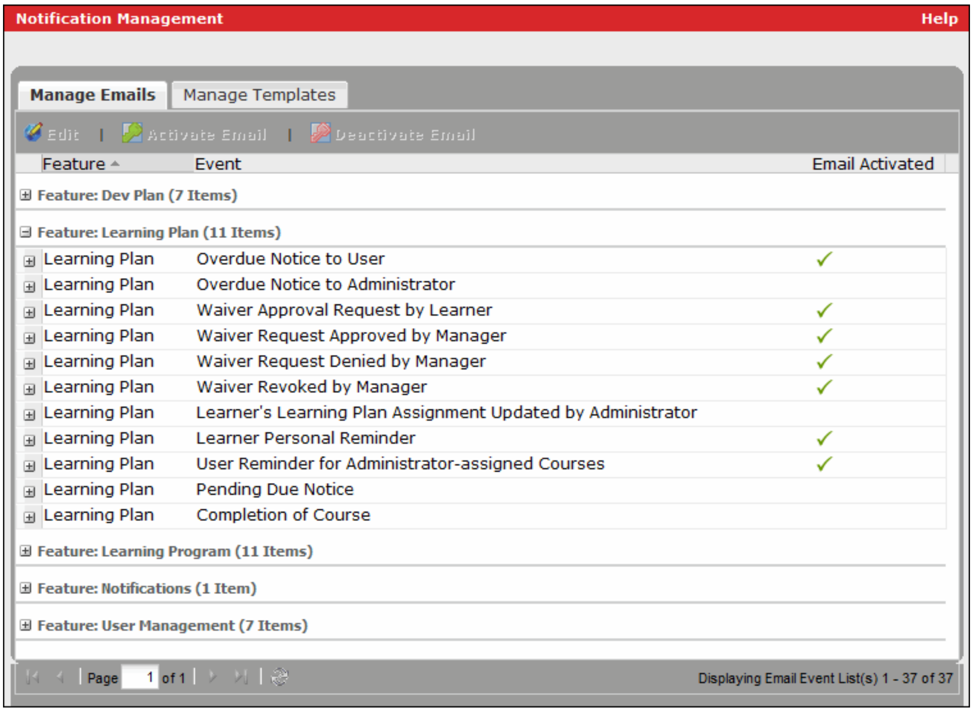
Activate or Deactivate an Email

When you activate an email, it is sent by Skillport to the specified recipients whenever the associated event occurs.

When you deactivate an email, it is never sent by Skillport when the associated event occurs. However, be aware that instances of the email that have already been queued by the system for delivery to recipients are still sent.

To activate or deactivate an email

1. Click **Configuration > Notification Management** on the navigation bar.



2. Select the event for which you want to activate or deactivate emails.

3. Do one of the following:

   - To activate the email, click **Activate Email** at the top of the tab. Activated emails have a ✓ in the Email Activated column.

   - To deactivate the email, click **Deactivate Email** at the top of the tab.

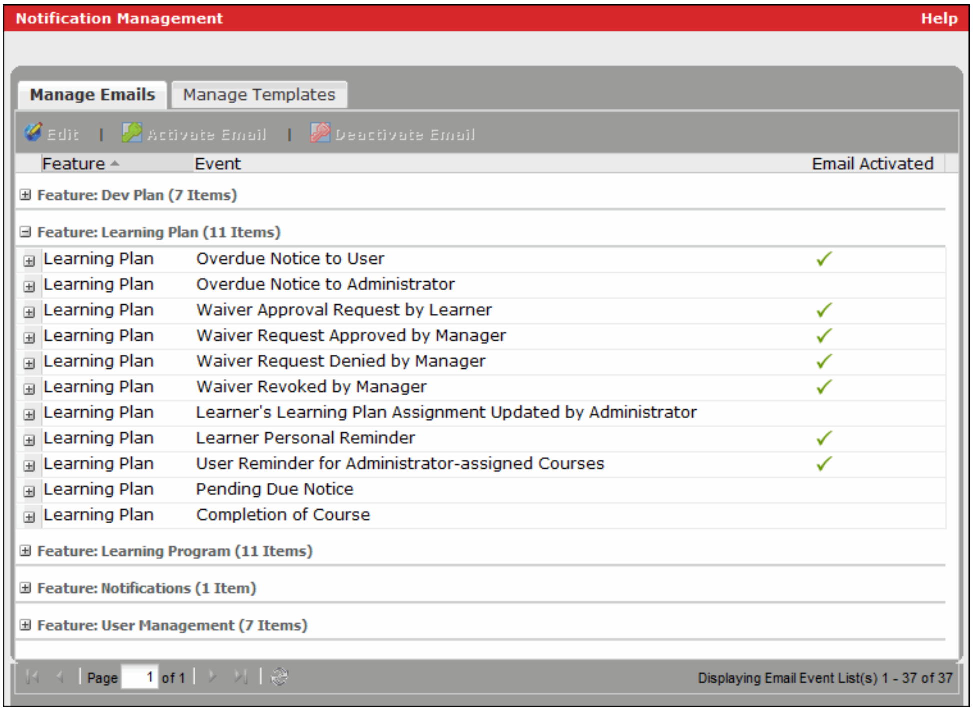
4. Click **Yes** to confirm the action.

Change the Email Template Used for an Email

At any time, you can change the email template that is used for sending emails when a specific event occurs. However, be aware that instances of the email based on the old template that have already been queued by the system for delivery to recipients are still sent.

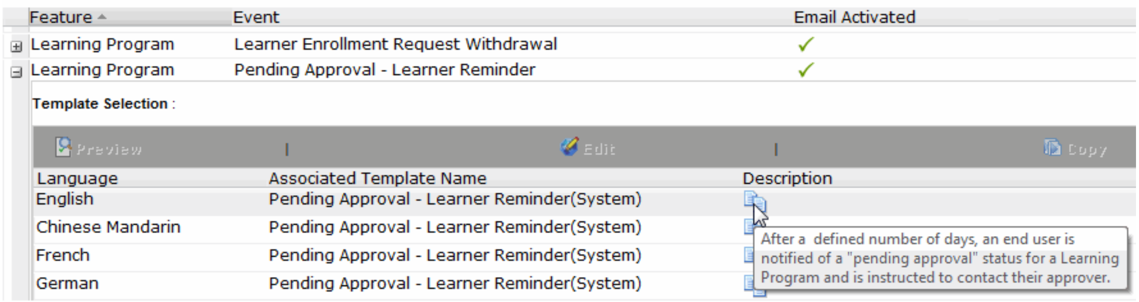
To change the email template used for an email

1. Click **Configuration > Notification Management** on the navigation bar.

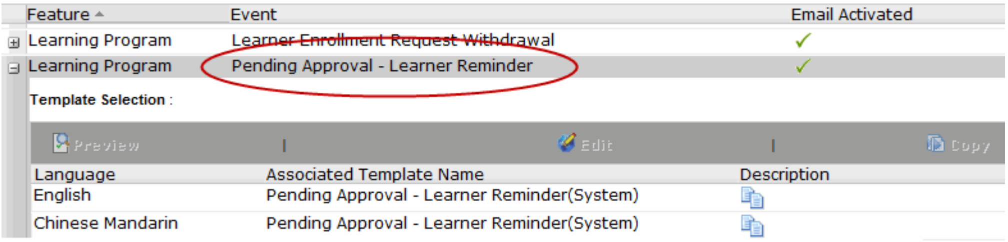


2. Find the event for which you want to specify a different template.

   The description of the template currently assigned to an event often can provide additional, useful information that can help you understand the event. If necessary, to verify you have identified the desired event, you can click expand (⊞) beside the event to view the name and description of the currently-assigned template.

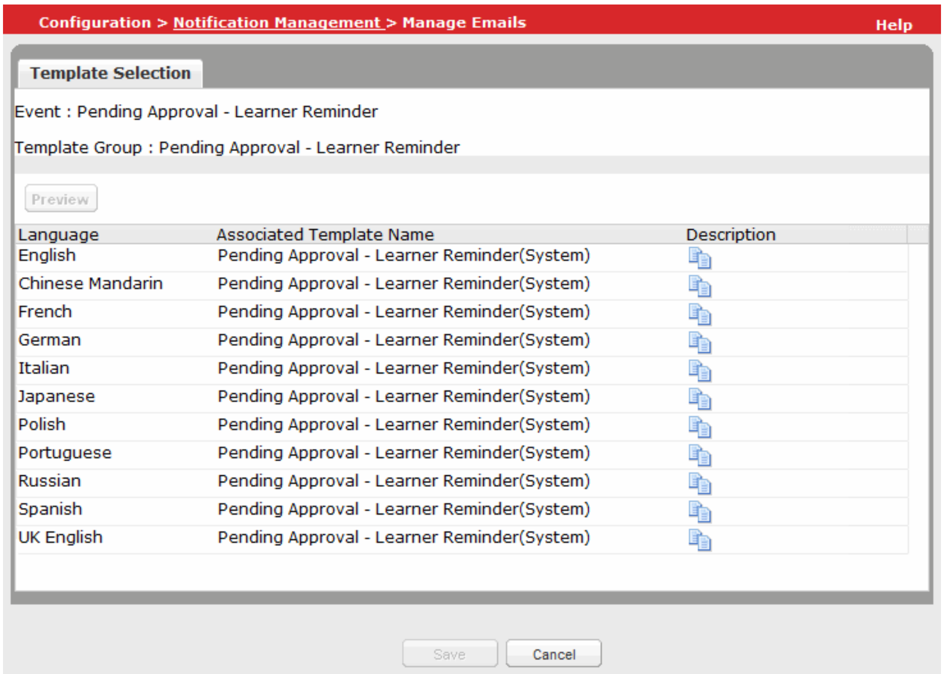


3. Select the event (*not* the template).



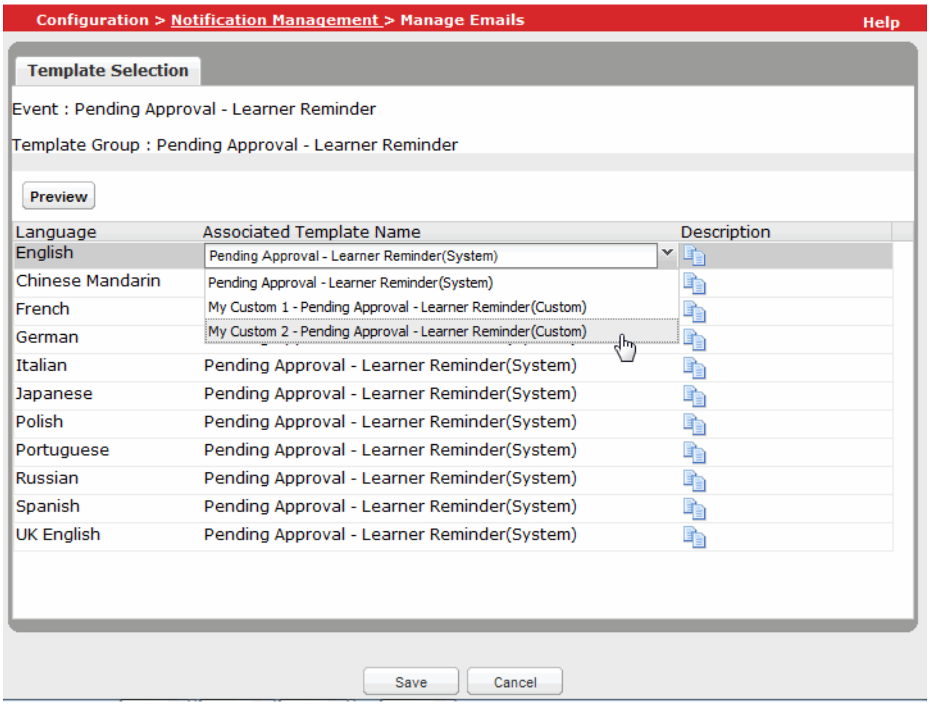
4. Click **Edit** at the top of the tab.

   The Manage Emails page displays.



5. In the Associated Template Name column, double-click the template name to activate the drop-down list.

6. In the drop-down list, select the template to assign to the event.



7. Click **Save**.

Managing Templates

View Existing Templates

With the exception of a limited number of non-customizable emails, all of the email templates that support the emails sent by Skillport are shown in Skillport Administrator. This allows you to examine the system templates provided with Skillport, and to create and use custom templates to further meet the needs of your organization.

There are two ways to access the email templates that support Skillport emails:

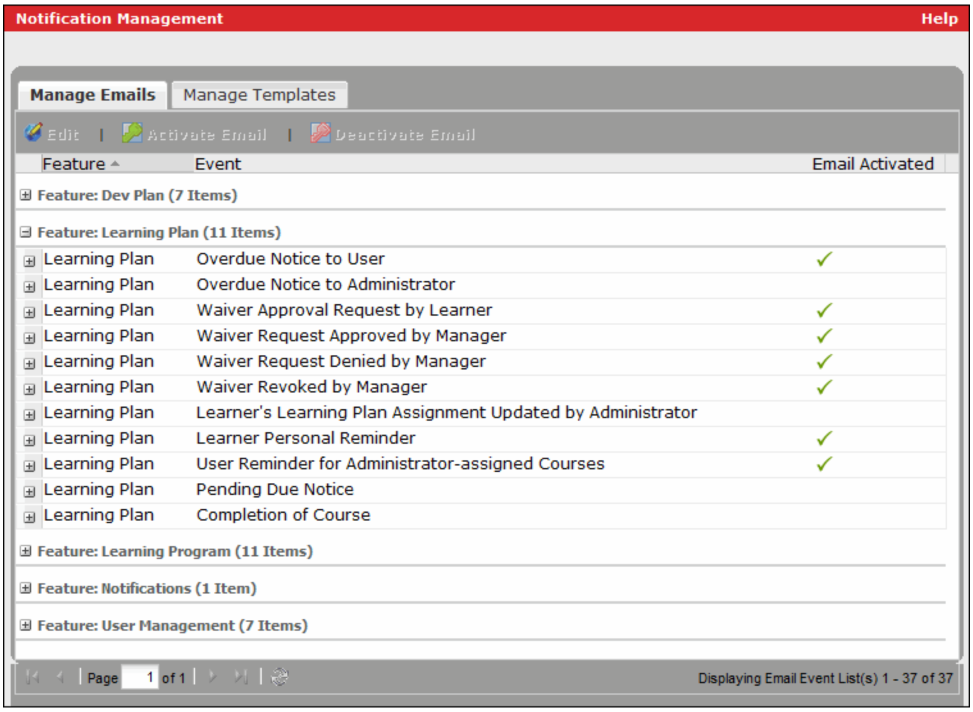
- The **Manage Emails tab**: Use this procedure when you do not know the name of the specific template that you want to view, but you do know the email that utilizes it.
- The **Manage Templates** tab: Use this procedure when you know the name of the specific template.

View existing templates using the Manage Emails tab

To view the existing templates

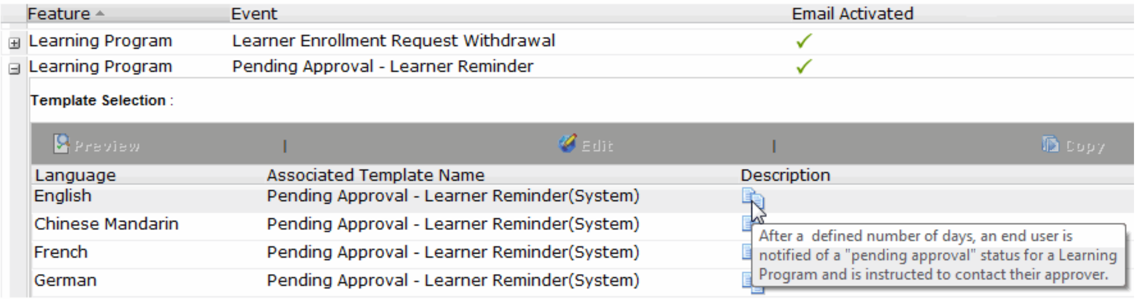
1. Click **Configuration | Notification Management** on the navigation bar.

   The Manage Templates page appears, which displays the Manage Emails tab by default. This tab groups the events by major feature area.



2. If desired, filter and sort the columns to change the information that is displayed. As an example, you can apply a filter to the Feature column to display just Learning Plan events so you can work easily with them. For help with filtering and sorting, see ***Manage Information in Tables*** on page 15.
3. Identify the event for which you want to view an assigned template.
4. Click the + sign to the left of that event.

The email templates (in all languages) that are assigned to the event are shown.



5. From this point, you can

   - Move the cursor over a template's Description icon to view a description of the template (shown above).
   - Select any template, and click the corresponding button to copy, preview (view an example based on the template), or edit it.

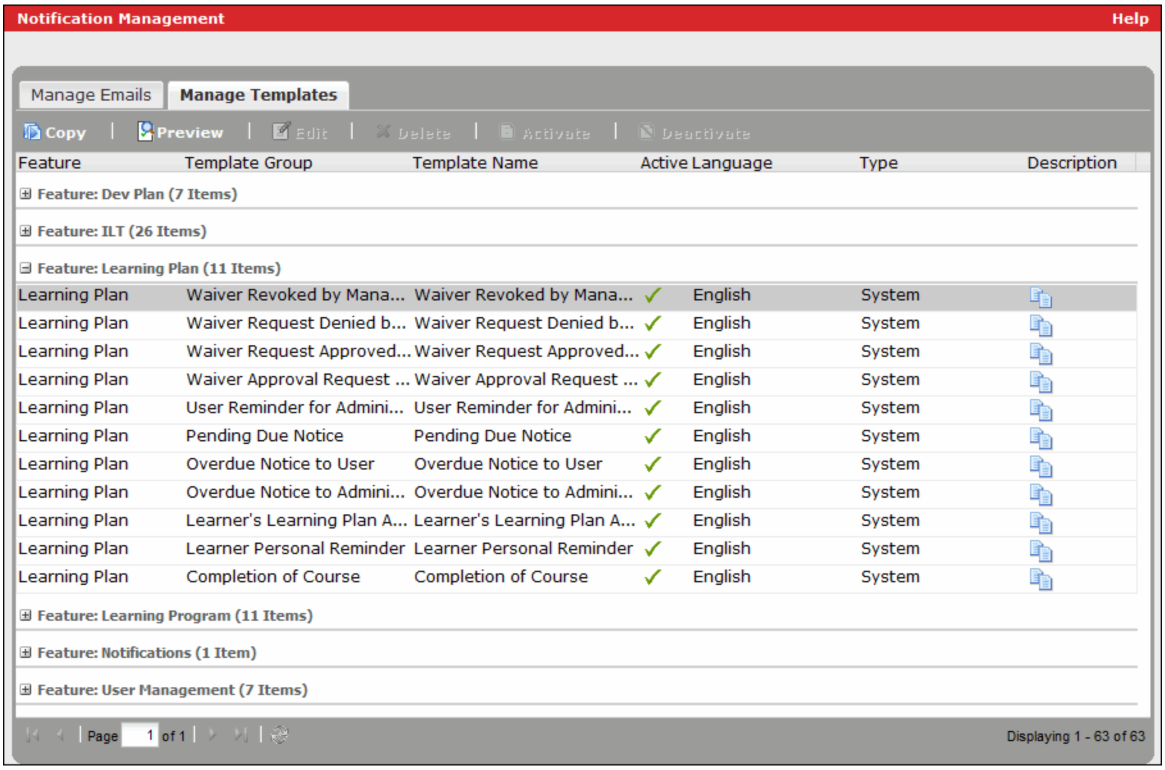
   You cannot delete or deactivate a template that is currently assigned to an event. You must first assign a different template to the event.

View existing templates using the Manage Templates tab

To view the existing templates

1. Click **Configuration | Notification Management** on the navigation bar.
2. Click the **Manage Templates** tab.
3. Click the + sign beside a feature area to display the templates available for use with that feature.

Both the system templates (the templates provided for your use) and the custom templates created by you (if any) are displayed.

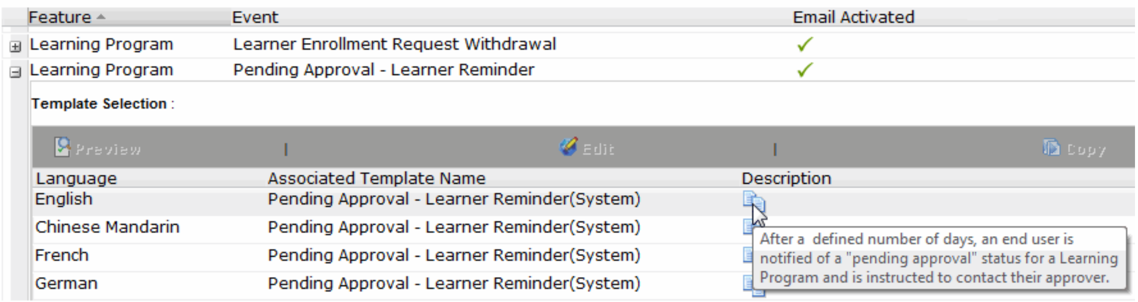


As shown in the preceding image, the templates are grouped first by feature (for example, Learning Plan) and grouped second by more granular aspects (for example, Pending Due Notice).

4. From this point, you can

   - Filter, sort, and hide columns to change the information that is displayed. As an example, you can apply a filter to the Feature column to display just Learning Plan templates so you can work easily with them. For help with filtering, sorting, and hiding columns, see ***Manage Information in Tables*** on page 15.

   - Move the cursor over a template's Description icon to view a description of the template.



   - Select any template, and click the corresponding button to copy, preview (view an example email based on the template), edit, delete, activate, deactivate, or delete it.

Preview a Template

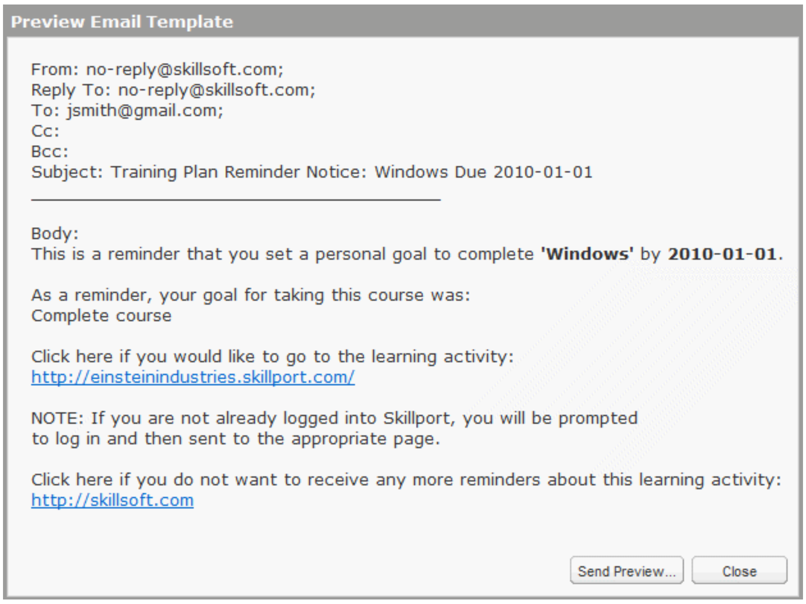
When you preview a template, you view an example email based on the template as it appears to a recipient. This allows you to examine the email's subject and body, so you can determine if they meet your requirements.

You can also email the example email to one or more recipients if you choose.

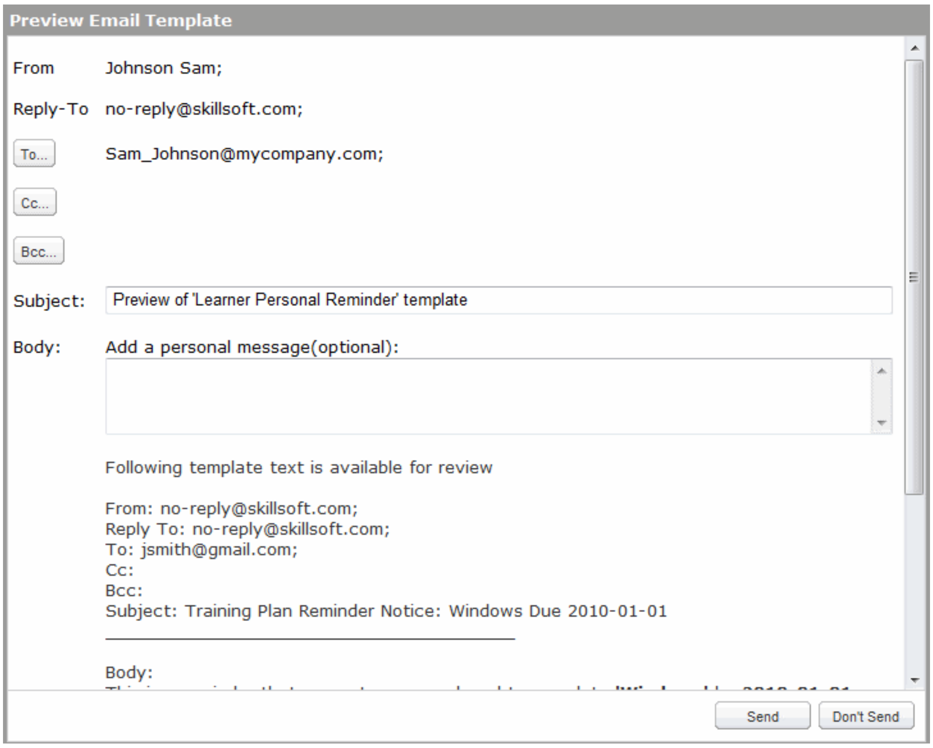
To preview a template

1. ***Find the template*** on page 449 that you want to preview.
2. Select the template, and click **Preview** just above it.

   In the Preview Email Template window, an example of an email based on the template displays.



3. If you do not want to send the email to yourself and others, click **Close**. Alternatively, if you do want to email it, click **Send Preview**, and continue with this procedure.



4. Specify the email recipients:

   a. Click **To** .

   b. In the Email To dialog box, use the search controls or browse the Users and Groups hierarchy in the left pane to find the user or group to whom to send the email. Then, select the user or group, and click the **Add** button between the two panes. Alternatively, you can drag the user or group to the right pane, and drop it. Moreover, you can do this with *any* tab active in the right pane, as the system automatically adds the user or group to the appropriate tab.

   c. To specify recipients with external email addresses, click the **External Emails** tab in the right pane. To add a recipient, click **Add**, enter the email address, and press **Enter**. To remove a recipient, select the recipient, and click **Remove**.

   d. Click **OK**.

   e. If desired, click **Cc** to add additional recipients, and repeat steps 4b through 4c. Optionally, click **Bcc** , and follow the same procedure.

5. If desired, modify the contents of the email:

   - Modify the Subject line.

   - Enter a personal message (maximum of 1,024 characters) in any language in the text box provided in the body.

Note: You can also change the read-only, introductory text that appears in all preview emails just above the example email. To do so, create a custom version of the Preview Template email template and then assign it to the Preview Template event. The language-specific email template that 1) is assigned to the event on the Notification Management page and 2) corresponds to the default site language of your Skillport site is used to send this email. You can enter the subject and an optional, personal message in any desired language.

6. Click **Send**.

Activate a Template

Once a templated is activated, you can assign it to a Skillport event that triggers the delivery of notification emails to users.

Note: After you activate a template, you must assign it to a Skillport event for it to be used by the system.

To activate a template

1. Click **Configuration > Notification Management** on the navigation bar.
2. Click the **Manage Templates** tab.
3. Find the template that you want to activate and select it.
4. Click **Activate**.
5. Click **Yes** to confirm the action.

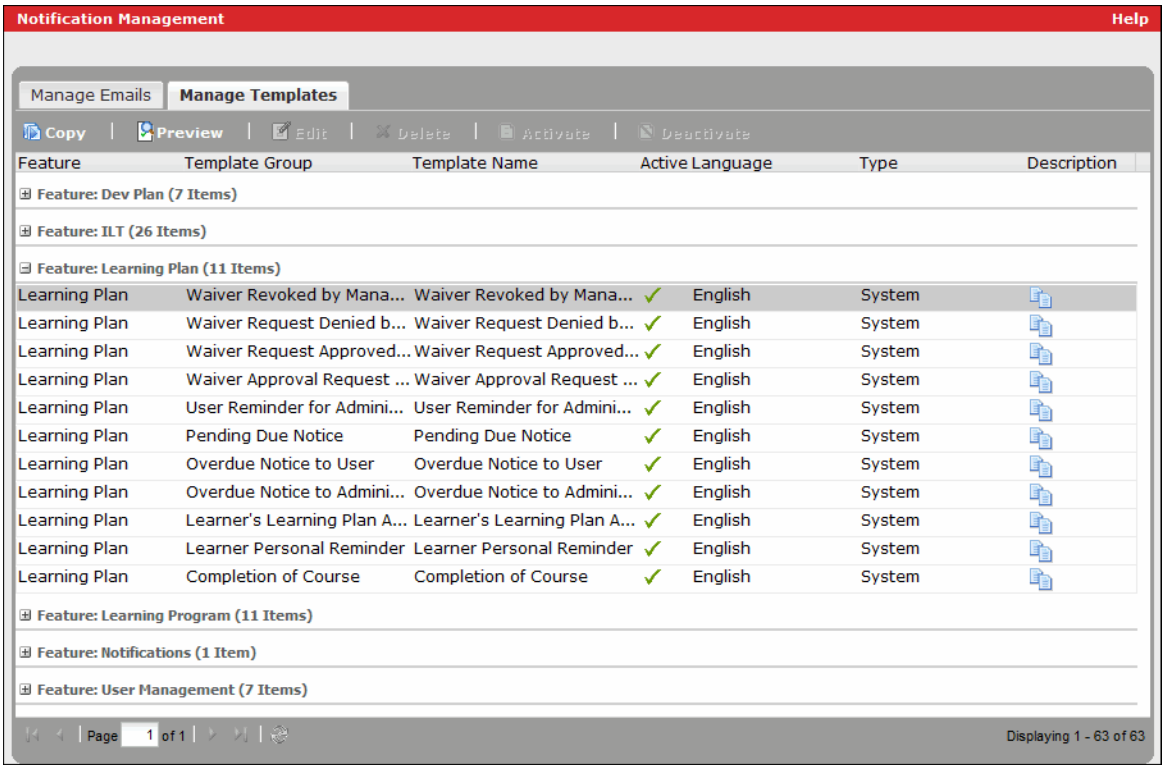
Create a Template

You create a template by copying an existing one. This allows you to quickly change just the aspects that must differ.

To create a template

1. On the Notification Management page, click the **Manage Templates** tab.

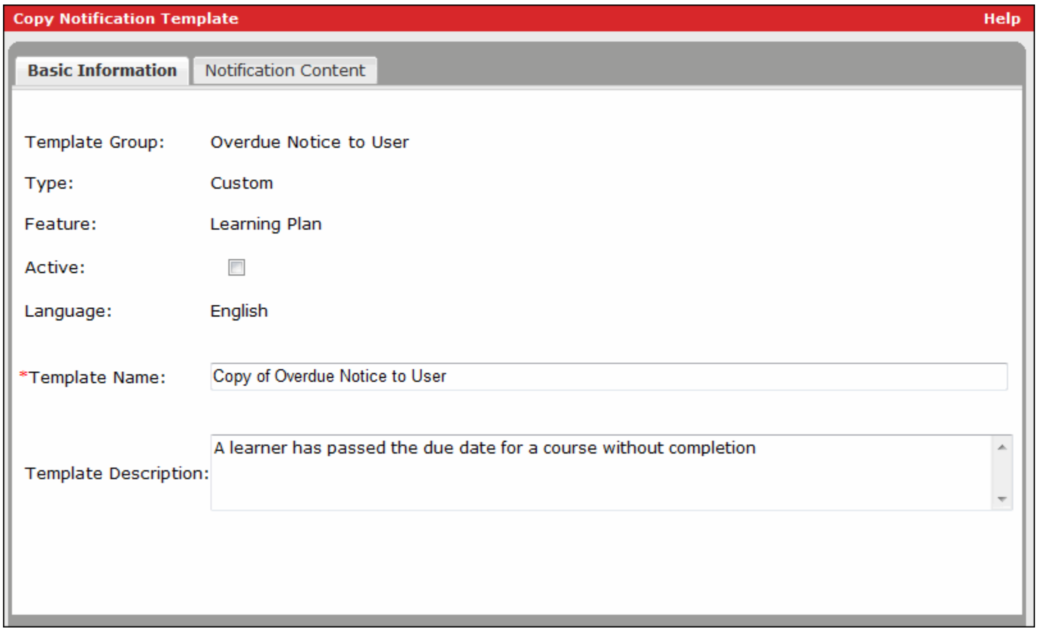
A complete list of all templates display:



2. ***Find the template*** on page 449 that you want to copy.

3. Cick **Copy**.

   The Copy Notification Template dialog box displays.



4. On the **Basic Information** tab, enter the information about the new template:

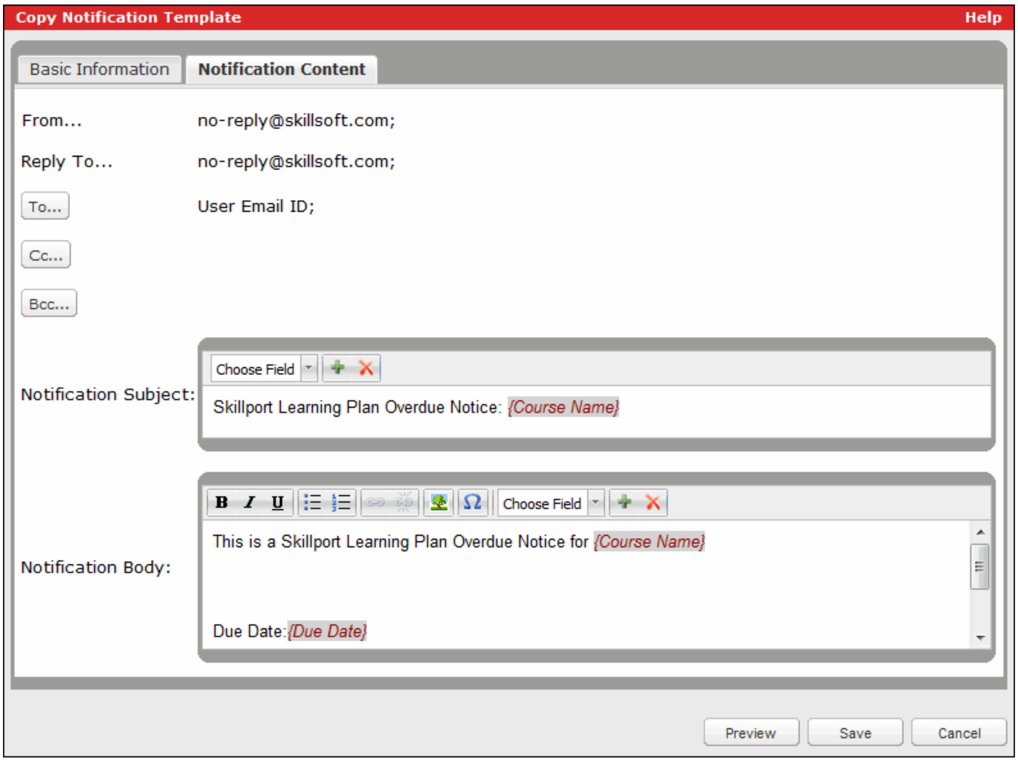
- **Active**: If you do not want the template to be used, keep this check box cleared to keep the template inactive. If you want to be able to use the template, select this check box to activate the template. Activating the template allows you to assign the template to a Skillport event, so that it is sent whenever that event occurs.

- **Template Name**: (Required) The name of the template. Change this value to differentiate your custom template from the original on which it was based. All template names must be unique.

- **Template Description**: The purpose and contents of the template. You can also change this value to differentiate the template from the original.

You cannot change a custom template's template group, type, feature, or language.

5. Click the **Notification Content** tab.



Note: The **From** and **Reply To** fields are not editable. These fields use the values specified in the following two notification settings:
- Default 'From' email address for notifications
- Default 'Reply To' email address for notifications

In the next steps, you specify the recipients and the content for the email. In all of the fields, you can select variables to insert, which are populated with actual data when the email is sent. The system restricts the list of available variables to only those that are appropriate for the field.

6. Specify the recipients:

- **To**: The individuals to whom to send the email.

- **Cc**: The individuals to whom to send a copy of the email.

- **Bcc**: The individuals to whom to send a blind copy of the email.

To change a default value, do the following:

a. Click **To**, **Cc**, or **Bcc**.

   The Select Variables dialog box displays.

b. To add a variable to the field, select it in the Available Variables pane, and click . You can use **Ctrl-click** or **Shift-click** to select multiple variables.

c. To remove a variable from the field, select it in the Selected Variables pane, and click **Remove**. You can use **Ctrl-click or Shift-click** to select multiple variables.

d. Click **OK**.

7. In the **Notification Subject** field, modify the text as necessary.

8. In the **Notification Body** field, modify the text as necessary. The message can include a combination of plain text, formatted text, and symbols (accessible via the button).

   Be aware that when using the Enter key to add line breaks, the text appears to be double-spaced in the editor, but in the actual email is only single-spaced. It is recommended that you use **Preview** to view an example email and adjust the formatting if necessary.

   You cannot format a selection of text that includes a field (variable). To apply the formatting, first format the selection of text (without the field), then insert the field. This applies the formatting to both the text and the field.

Note: You can add hyperlinks and fields (variables) to both the subject and body, and you can also add images to the body.

9. To insert a field:

   a. Put the cursor in the desired location.

   b. Select the field from the drop-down list on the toolbar.

   c. Click .

   (To remove a field, select it, and click .)

10. To add a hyperlink:

   a. Select the text to convert to a hyperlink, and click .

      The Insert/edit link dialog box displays.

   b. For **Link URL**, enter the URL. This value is required. The URL must be complete and, therefore, must begin with the following:

      `http://`

   c. For **Target**, specify whether the URL should be launched in a new browser window or the existing browser window. If you do not specify a value, the link is launched in a new window. This setting affects browser-based email clients only, and the recipient’s own browser settings determine whether or not it is respected. Non-browser-based email clients always use a new window.

   d. For **Title**, enter a short description. In browser-based email clients only, this appears as a “tool tip” when the user moves the cursor over the link.

Note: You do not have to configure the **Class** setting. It is not used.

e. Click **Insert**.

(To remove a link, place the cursor inside it, and click .)

11. To add an image:

a. Put the cursor in the desired location, and click .

The Insert/edit image dialog box displays.

b. For **Image URL**, enter the complete URL for the location of the image. The image must be a JPEG or GIF file that is hosted on a web site elsewhere. In the recipient's email, the URL will render as a link that, if clicked, will render the image itself. This value is required.

c. For **Image description**, enter a description of the image. In text-only environments (browsers that cannot display inline images), this text is displayed instead of the image. This value is required.

d. For **Alignment**, select how to align the image relative to the line of text in which it is inserted. For example, select "Left" to align the image with the left margin and have the text wrap around the image's right side.

e. For **Dimensions**, enter in pixels the size (width x height) of the image if you want it to be resized before being inserted into the email.

f. For **Border**, enter in pixels the width of the border to add around the image.

g. For **Vertical space**, enter in pixels the width of the padding to add before and after the image.

h. For **Horizontal space**, enter in pixels the width of the padding to add to the left and right of the image.

i. Click **Insert**.

12. Click **Preview** to view an example of an email based on the template as it appears to a recipient.

13. Make changes as necessary.

14. Click **Save**, and then click **OK**.

At this point, you may want to activate the template and then assign it to an event.

Edit a Template

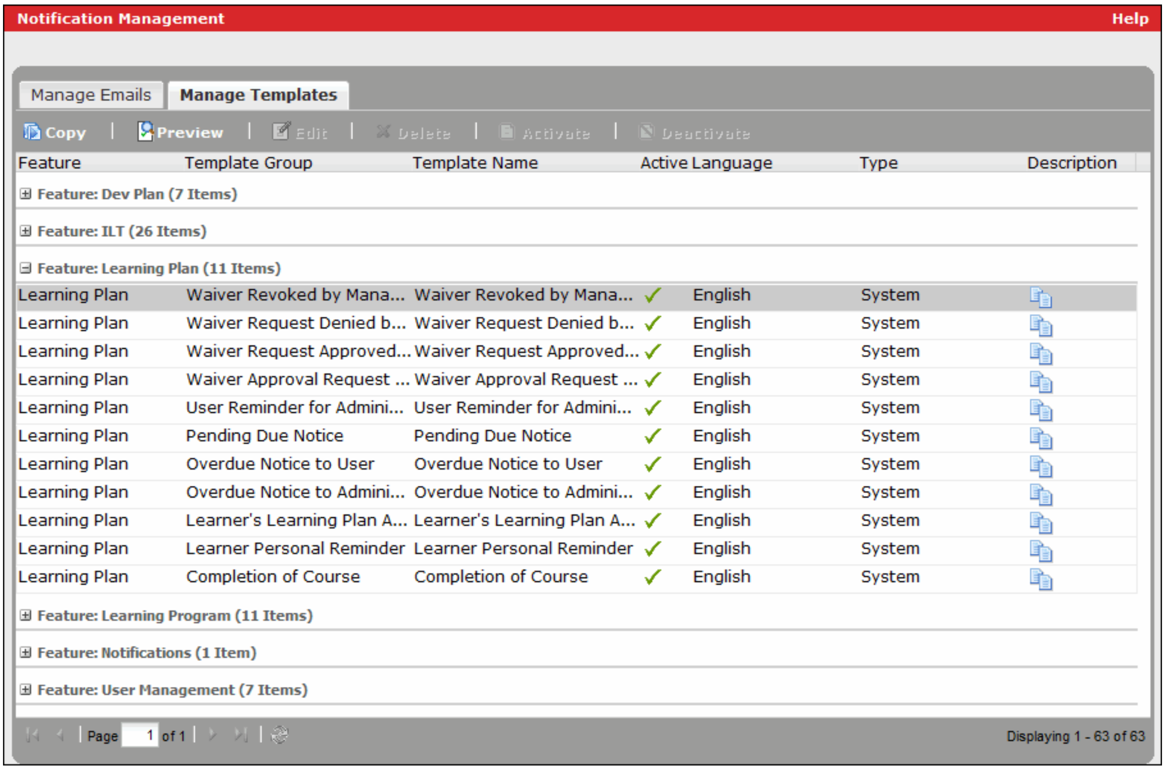
You can only edit custom templates. To create a custom template, refer to Create a Template.

You can edit an active or deactivated template at any time. However, be aware that instances of the email based on the old version of the template are still sent if they have already been queued by the system for delivery.

To edit a template

1. On the Notification Management page, click the **Manage Templates** tab.

A complete list of all templates display:



2. Select the template you wish to modify, and click **Edit**.
3. Change the template's properties and content as needed.
4. Click **Preview** to view an example email based on the template.
5. If the template requires no additional changes, click **Save**, and then click **OK**.

Deactivate a Template

Deactivating a template prevents it from being assigned to (used by) a Skillport event that triggers the delivery of notification emails to users.

You can deactivate a template if it is not currently assigned to a Skillport event, and you can deactivate both custom templates and the system templates that are provided by default with Skillport.

If you deactivate a template for which emails have already been queued by the system for delivery to recipients, the queued emails are still sent.

To deactivate a template

1. Click **Configuration > Notification Management** on the navigation bar.
2. Click the **Manage Templates** tab.
3. Find the template that you want to activate, select it, and click **Deactivate**.
4. Click **Yes** to confirm the action.

Delete a Template

If your site has been configured to support custom user privileges, company administrators can be granted the **Delete Email Template** privilege that allows them to delete templates.

Deleting a template permanently removes it from the system. You can delete a template if it meets the following criteria:

- It is a custom template. You cannot delete a system template.
- It is not currently assigned to a Skillport event that triggers the delivery of emails.

If you delete a template for which emails have already been queued by the system for delivery to recipients, the queued emails are still sent. As an alternative to deleting a template, consider deactivating it.

To delete a template

1. Click **Configuration > Notification Management** on the navigation bar.
2. Click the **Manage Templates** tab.
3. Find the custom template that you want to activate, select it, and click **Delete**.
4. Click **Yes** to confirm the action.

Variables

The topics in this section provide descriptions of the variables available for use in email templates. Be aware that the system only makes available to you the list of variables that are appropriate for the given template and field.

When an email is sent, the variable is replaced with actual data from the system. If no data is available, the field is rendered blank (empty).

Variables in Development Plan Templates
Development Plan Approval Request by Learner

Dev Plan Note for Approval Manager: The comment entered by the user regarding the approval request

Manager: The email address of the approval manager selected by the learner when he or she submitted the approval request

SkillPort URL: The URL to the login page for SkillPort

User First Name: The first name of the learner

User Last Name: The last name of the learner

User Name: The user name of the learner

Development Plan Request Approved by Manager

Approval Manager/Admin Name: The first name and last name of the person who approved or denied the development plan

Note FROM Approval Manager: The comment about the reason for the approval or denial

User Email ID: The email address of the learner

Development Plan Request Denied by Manager

Approval Manager/Admin Name: The first name and last name of the person who approved or denied the development plan

Note FROM Approval Manager: The comment about the reason for the approval or denial

User Email ID: The email address of the learner

Learning Event Approval Request by Learner

Approval Manager Link: The URL to directly access the Approval Manager UI after logging in to SkillPort

Cost: The cost of the learning event

Description: The description of the learning event

Duration: The duration of the learning event

End Date: The end date of the learning event

Goal: The goal of the learning event

Manager: The email address of the approval manager selected by the learner when he or she submitted the approval request

Note for Approval Manager: The note supplied by the learner when he or she submitted the approval request

Start Date: The start date of the learning event

Status: The status of the learning event (Not Started, Started, Completed)

Title of LE: The title of the learning event

URL: The URL of the learning event

User First Name: The first name of the learner

User Last Name: The last name of the learner

User Name: The user name of the learner

Whether LE is Required: Whether the learning event is required (true for yes, false for no)

Learning Event Approval Revoked by Manager

Notes: The comment about the revocation

Title of LE: The title of the learning event

User Email ID: The email address of the learner

Learning Event Request Approved by Manager

Approval Manager/Admin Name: The first name and last name of the approval manager or administrator who approved or denied the learning event

Note FROM Approval Manager: The comment about the reason for the approval or denial

Title of LE: The title of the learning event

User Email ID: The email address of the learner

Learning Event Request Denied by Manager

Approval Manager/Admin Name: The first name and last name of the approval manager or administrator who approved or denied the learning event

Note FROM Approval Manager: The comment about the reason for the approval or denial

Title of LE: The title of the learning event

User Email ID: The email address of the learner

Variables in Instructor Led Training (ILT) Templates
Ad Hoc Email to a Course Watch List

Classroom Name: The name of the classroom

Course Description: The description of the course

Course Title: The title of the course

Course Owned by Email: The email addresses of the course administrators for the course

Facility Name: The name of the facility

Watch List Learners: The email addresses of the learners on the course's watch list

Approval for Enrollment Request by Learner

Approval Reminder Days: The number of days that have elapsed since the session approver/approval manager was notified to approve or deny the learner's request to enroll in the session. This number is based on the value of the Approval Reminder Relative Date setting (see ILT Site Settings).

Approver Email: The email address of the learner's approval manager

Approver First Name: The first name of the learner's approval manager

Approver Last Name: The last name of the learner's approval manager

Approval Manager: The email address of the learner's approval manager

Base SkillPort URL: The URL for the SkillPort login page

Course ID: The ID of the course

Course Title: The title of the course

Go To Approval URL: The URL to directly access the Approval Manager UI after logging in to SkillPort

Learner Email: The email address of the learner

Session Approver: The email address of the session approver assigned to the session

Session ID: The ID of the session

Session Type: The type of session (physical classroom, online classroom, or Dialogue Live session)

Target Approval Date: The date by which approval is required. The date and time are based on 1) when the enrollment request was made and 2) the value of the Approval Expires Relative Date setting (see ILT Site Settings).

Target Approval Date Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

User First Name: The first name of the learner

User Last Name: The last name of the learner

User Login: The user name of the learner

Course Activated

Course Administrator(s): The email addresses of the course administrators for the course

Course Title: The title of the course

Course Url: The URL of the parent course's summary page

Watch List Learner: The email addresses of the learners on the course's watch list

Course Removal

Course Administrator(s): The email addresses of the course administrators for the course

Course Title: The title of the course

Watch List Learners: The email addresses of the learners on the course's watch list

Course Updated

Base SkillPort URL: The URL for the SkillPort login page

Classroom: The name of the classroom

Course Administrator(s): The email addresses of the course administrators for the course

Course Interest List: The email addresses of the learners on the course's watch list

Course Title: The title of the course

Go To Sessions URL: The URL of the parent course's summary page

Watch List Learner: The email addresses of the learners on the course's watch list

Enrollment Request Approved by Administrator

Approval Manager: The email address of the learner's approval manager

Approver Email: The email address of the learner's approval manager

Approver First Name: The first name of the learner's approval manager

Approver Last Name: The last name of the learner's approval manager

Course Title: The title of the course

Learner Email: The email address of the learner

Learner First Name: The first name of the learner

Learner Last Name: The last name of the learner

Number: The ID of the course

Session Approver: The email address of the session approver assigned to the session

Session ID: The ID of the session

Session Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Session Type: The type of session (physical classroom, online classroom, or Dialogue Live session)

Student Login Name: The user name of the learner

Enrollment Request Approved by Administrator/Approver

Approved Students: The email address of the learner whose enrollment request was approved

Approver Notes: The note entered by the person who approved or denied the request

Course Title: The title of the course

Learner Email: The email address of the learner

Learner First Name: The first name of the learner

Learner Last Name: The last name of the learner

Learner Login: The user name of the learner

Session Administrator Name

Session ID: The ID of the session

Session Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Session Type: The type of session (physical classroom, online classroom, or Dialogue Live session)

Enrollment Request Awaiting Approval

Approval Reminder Days: The number of days that have elapsed since the session approver/approval manager was notified to approve or deny the learner's request to enroll in the session. This number is based on the value of the Approval Reminder Relative Date setting (see ILT Site Settings).

Approver Email: The email address of the learner's approval manager

Approver First Name: The first name of the learner's approval manager

Approver Last Name: The last name of the learner's approval manager

Approval Manager: The email address of the learner's approval manager

Awaiting Approval Learner: The email address of the learner who is waiting for approval to enroll in the session

Course ID: The ID of the course

Course Title: The title of the course

Elapsed Days since Request: The number of days that have elapsed since the session approver/approval manager was notified to approve or deny the learner's request to enroll in the session. This number is based on the value of the Approval Reminder Relative Date setting (see ILT Site Settings).

Learner Email: The email address of the learner

Learner First Name: The first name of the learner

Learner Last Name: The last name of the learner

Learner Login: The user name of the learner

Maximum request expiry days: The number of days remaining after which the enrollment request expires. This number of days is based on 1) when the enrollment request was made and 2) the value of the Approval Expires Relative Date setting (see ILT Site Settings).

Session Approver Email: The email address of the session approver assigned to the session

Session ID: The ID of the session

Session Type: The type of session (physical classroom, online classroom, or Dialogue Live session)

Enrollment Request by Learner

Approval Expiration Days: The number of days remaining after which the enrollment request expires. This number of days is based on 1) when the enrollment request was made and 2) the value of the Approval Expires Relative Date setting (see ILT Site Settings).

Approval Manager: The email address of the learner's approval manager

Course ID: The ID of the course

Course Title: The title of the course

Expired Date: The date on which the enrollment request expires. This date is based on 1) when the enrollment request was made and 2) the value of the Approval Expires Relative Date setting (see ILT Site Settings).

Learner: The email address of the learner

Learner Email: The email address of the learner

Learner First Name: The first name of the learner

Learner Login: The user name of the learner

Learner Second Name: The last name of the learner

Session Approver: The email address of the session approver assigned to the session

Session ID: The ID of the session

Session Type: The type of session (physical classroom, online classroom, or Dialogue Live session)

Enrollment Request Denied by Administrator

Approval Manager: The email address of the learner's approval manager

Approver Email: The email address of the learner's approval manager

Approver First Name: The first name of the learner's approval manager

Approver Last Name: The last name of the learner's approval manager

Approver Note to learner: The note entered by the person who approved or denied the request

Course ID: The ID of the course

Course Title: The title of the course

Learner Email: The email address of the learner

Learner First Name: The first name of the learner

Learner Last Name: The last name of the learner

Learner Login: The user name of the learner

Session Approver: The email address of the session approver assigned to the session

Session ID: The ID of the session

Session Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Session Type: The type of session (physical classroom, online classroom, or Dialogue Live session)

Enrollment Request Denied by Administrator/Approver

Approver Email: The email address of the learner's approval manager

Approver First Name: The first name of the learner's approval manager

Approver Last Name: The last name of the learner's approval manager

Approval Manager: The email address of the learner's approval manager

Approval Note: A comment about the reason for the denial of the enrollment request.

Base SkillPort URL: The URL for the SkillPort login page

Course Identifier: The ID of the course

Course Title: The title of the course

Declined Learners: The email addresses of the learners for whom the enrollment request was denied.

Course Url: The URL of the parent course's summary page

Learner Email: The email address of the learner

Learner First Name: The first name of the learner

Learner Last Name: The last name of the learner

Learner Login: The user name of the learner

Session Approver: The email address of the session approver assigned to the session

Session ID: The ID of the session

Session Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Session Type: The type of session (physical classroom, online classroom, or Dialogue Live session)

Enrollment Status Change Notification

Base SkillPort URL: The URL for the SkillPort login page

Classroom: The name of the classroom

Classroom Directions: The directions to reach the classroom

Course Title: The title of the course

Facility Name: The name of the facility

Facility Directions: The directions to reach the facility

Go To Registration URL: The URL of the parent course's summary page

Learner: The email address of the learner

Learner Enrollment Status: The learner's enrollment status

- Pending Approval (if the learner's enrollment request has not yet been approved)
- Pending Session (if the session has not been confirmed)
- Confirmed (if the session has been confirmed)

Waiting list (if the learner is on the waiting list because the session has reached its capacity)

Session ID: The ID of the session

Session Notes: The notes about the session

Session Status: The status of the session (Unconfirmed or Confirmed)

Enrollment Withdrawal Notification

Approval Manager: The email address of the learner's approval manager

Base SkillPort URL: The URL for the SkillPort login page

Course ID: The ID of the course

Course Title: The title of the course

Go To Sessions URL: The URL of the parent course's summary page

Instructor Email: The email address of the instructor assigned to the session

Learner Email: The email address of the learner

Session Admin: The email addresses of the session administrators assigned to the session

Session Approver Email: The email address of the session approver assigned to the session

Session ID: The ID of the session

Student First Name: The first name of the learner

Student Last Name: The last name of the learner

Instructor Change Notification

Course Title: The title of the course

Instructor First Name: The first name of the instructor

Instructor Last Name: The last name of the instructor

Instructor (New): The email address of the new instructor assigned to the session

Instructor (Old): The email address of the old instructor assigned to the session

Session Administrator(s): The email addresses of the session administrators assigned to the session

Session ID: The ID of the session

Session Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Notify All Enrolled and Waitlisted Learners in a Session

Course Title: The title of the course

Session Notes: The notes about the session

Session ID: The ID of the session

Session Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Status: The status of the session (Unconfirmed or Confirmed)

Request for Enrollment Expired

Awaiting Approval Learner: The email address of the learner who is waiting for approval to enroll in the session

Course ID: The ID of the course

Course Title: The title of the course

Base SkillPort URL: The URL for the SkillPort login page

Go To Registration URL: The URL of the parent course's summary page

Session Cancelled

Course Title: The title of the course

Instructor: The email address of the instructor assigned to the session

Learners: The email addresses of the learners enrolled in the session

Session ID: The ID of the session

Session Owners: The email addresses of the session administrators assigned to the session

Session Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Session Closed

Approvers/Managers for Pending Approval Learner: The email address of the session approver and/or approval manager for the learner whose enrollment request is pending approval

Course Title: The title of the course

Pending Approval Learner: The email addresses of the learners whose enrollment requests are pending approval

Session ID: The ID of the session

Waiting List Learner: The email addresses of the learners on the session's wait list

Session Closed - Roster Listing

Course Title: The title of the course

Instructor: The email address of the instructor assigned to the session

Instructor First Name: The first name of the instructor

Instructor Last Name: The last name of the instructor

Session Administrator(s): The email addresses of the session administrators assigned to the session

Session ID: The ID of the session

Session Notes: The notes about the session

Session Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Status: The status of the session (Unconfirmed or Confirmed)

Session Confirmed

Approval Manager: The email address of the learner's approval manager

Course Title: The title of the course

Facility Name: The name of the facility

Instructor: The email address of the instructor assigned to the session

Instructor First Name: The first name of the instructor

Instructor Last Name: The last name of the instructor

Pending Session Learner: The email addresses of the learners enrolled in the session that is no longer unconfirmed (pending)

Session Administrator(s): The email addresses of the session administrators assigned to the session

Session Approver: The email address of the session approver assigned to the session

Session ID: The ID of the session

Session Notes: The notes about the session

Session Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Session Created

Base SkillPort URL: The URL for the SkillPort login page

Course Title: The title of the course

Course Watch list Learners: The email addresses of the learners on the course's watch list

Instructor: The email address of the instructor assigned to the session

Registration URL: The URL of the parent course's summary page

Session Administrator(s): The email addresses of the session administrators assigned to the session

Session ID: The ID of the session

Session Notes: The notes about the session

Session Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Session Deleted

Course ID: The ID of the course

Course Title: The title of the course

Instructor: The email address of the instructor assigned to the session

Learner: The email address of the learner enrolled in the session

Session Administrator(s): The email addresses of the session administrators assigned to the session

Session ID: The ID of the session

Session Notes: The notes about the session

Session Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Status: The status of the session (Unconfirmed or Confirmed)

Session Enrollment Limit

Course Title: The title of the course

Enrollment %: The percentage of enrollment based on the session's capacity

Instructor First Name: The first name of the instructor

Instructor Last Name: The last name of the instructor

Session Administrator(s): The email addresses of the session administrators assigned to the session

Session ID: The ID of the session

Session Notes: The notes about the session

Session Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Session Re-Opened for Enrollment

Course Title: The title of the course

Instructor First Name: The first name of the instructor

Instructor Last Name: The last name of the instructor

(parent) Course Admin(s): The email addresses of the course administrators assigned to the parent course

Session Admin(s): The email addresses of the session administrators assigned to the session

Session ID: The ID of the session

Session Instructor: The instructor assigned to the session

Session Notes: The notes about the session

Session Status: The status of the session (Unconfirmed or Confirmed)

Session Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Session Seats Become Available - Watch List

Course Title: The title of the course

Session ID: The ID of the session

Watch List Learners: The email addresses of the learners on the course's watch list

Session Updated

Course Title: The title of the course

Enrolled Learner: The email address of the learner(s) enrolled in the session

Instructor: The email address of the instructor assigned to the session

Session Administrator(s): The email addresses of the session administrators assigned to the session

Session ID: The ID of the session

Session Notes: The notes about the session

Time Zone: The time zone of the target approval date. This value is set in the session's schedule.

Variables in Learning Program Templates
Enrollment Approval by Manager

LP Name: The name of the learning program

LP Status: The user’s status in the learning program

Notes: The comment entered by the approval manager indicating the reason for the approval or denial

User Email ID: The email address of the learner

Enrollment Approval Request

Approval Manager Link: The URL to directly access the Approval Manager UI after logging in to SkillPort

LP Name: The name of the learning program

Manager: The email address of the approval manager selected by the learner when he or she submitted the approval request

Notes: The note for the approval manager supplied by the learner in the enrollment request

User First Name: The first name of the learner

User Last Name: The last name of the learner

User Name: The user name of the learner

Enrollment Denial - Automated to Learner

LP Name: The name of the learning program

SkillPort URL: The URL to the login page for SkillPort

User Email ID: The email address of the learner

User Name: The user name of the learner

Enrollment Denial - Automated to Manager

Approval Days since request: The number of days that have elapsed since you were notified to approve or deny the learner’s request to enroll in the learning program

Course Name: The name of the course

Manager: The email address of the approval manager selected by the learner when he or she submitted the approval request

username: The user name of the learner

Enrollment Request Denied by Manager

LP Name: The name of the learning program

LP Status: The user’s status in the learning program

Notes: The comment entered by the approval manager indicating the reason for the approval or denial

User Email ID: The email address of the learner

Learner Withdrawal

Learning Program Name: The name of the learning program

User Email ID: The email address of the learner

Learning Enrollment Request Withdrawal

Learning Program Name: The name of the learning program

Manager: The email address of the approval manager selected by the learner when he or she submitted the approval request

User Name: The user name of the learner

Learning Program Enrollment

Learning Program Name: The name of the learning program

SkillPort URL: The URL to the login page for SkillPort

User Email ID: The email address of the learner

Learning Program Status Change

Learning Program Name: The name of the learning program

Learning Program Status: The user's status in the learning program (Pending Approval or Enrolled)

User Email ID: The email address of the learner

Pending Approval - Learner Reminder

Elapsed Days since Request: The number of days that have elapsed since the approval manager was notified to approve or deny the learner’s request to enroll in the learning program

Learning Program Name: The name of the learning program

Learning Program Number: The ID of the learning program

Manager Email: The email address of the approval manager selected by the learner when he or she submitted the approval request

User Email ID: The email address of the learner

Pending Approval - Manager Reminder

Elapsed Days since Request: The number of days that have elapsed since the approval manager was notified to approve or deny the learner’s request to enroll in the learning program

Manager: The email address of the approval manager selected by the learner when he or she submitted the approval request

Learning Program Name: The name of the learning program

Learning Program Number: The ID of the learning program

User First Name: The first name of the learner

User Last Name: The last name of the learner

Variables in Learning Plan Templates
Completion of Course

Admin Email ID: The email address of the administrator who assigned the asset

Learner Personal Reminder

Course Title: The title of the course

Delete Course Reminder: The hyperlink learners can click if they no longer want to receive reminders for this course.

Due Date: The due date for completing the learning asset

Goal: The goal for taking the learning asset

Summary Page URL: The URL of the learning asset's summary page

User Email ID: The email address of the learner

Learner's Learning Plan Assignment Updated by Administrator

User Email ID: The email address of the learner

Overdue Notice to Administrator

Admin Email ID: The email address of the administrator who assigned the asset

Overdue Notice to User

Course Name: The name of the course

Due Date: The due date for completing the learning asset

Goal: The goal for taking the learning asset

User Email ID: The email address of the learner

Pending Due Notice

Admin: The email address of the administrator who assigned the asset

User Reminder for Administrator-assigned Courses

Course Title: The title of the course

Delete Course Reminder: The hyperlink learners can click if they no longer want to receive reminders for this course.

Due Date: The due date for completing the learning asset

Goal: The goal for taking the learning asset

Summary Page URL: The URL of the learning asset's summary page

User Email ID: The email address of the learner

Waiver Approval Request by Learner

Course ID: The ID of the course

Course Name: The name of the course

Manager: The email address of the approval manager selected by the learner when he or she submitted the approval request

URL: The URL to directly access the Approval Manager UI after logging in to SkillPort

User First Name: The first name of the learner

User Last Name: The last name of the learner

User Name: The user name of the learner

Waiver Request Note: A note explaining the reason for the waiver request, approval, denial, or revocation

Waiver Request Approved by Manager

Approval Manager/Admin Name: The first name and last name of the approval manager or administrator who approved, denied, or revoked the waiver

Course ID: The ID of the course

Course Name: The name of the course

User Email ID: The email address of the learner

Waiver Request Note: A note explaining the reason for the waiver request, approval, denial, or revocation

Waiver Request Denied by Manager

Approval Manager/Admin Name: The first name and last name of the approval manager or administrator who approved, denied, or revoked the waiver

Course ID: The ID of the course

Course Name: The name of the course

User Email ID: The email address of the learner

Waiver Request Note: A note explaining the reason for the waiver request, approval, denial, or revocation

Waiver Revoked by Manager

Approval Manager/Admin Name: The first name and last name of the approval manager or administrator who approved, denied, or revoked the waiver

Course ID: The ID of the course

Course Name: The name of the course

User Email ID: The email address of the learner

Waiver Request Note: A note explaining the reason for the waiver request, approval, denial, or revocation

Variables in User Management Templates

Ad-hoc Email

The Ad-hoc Email template supports the Send Email feature that is accessible by clicking **Users & Groups | Send Email** on the navigation bar. There are no variables available in the template. Instead, administrators specify the recipients directly using the Send Email page.

The "system" Ad-hoc Email template contains no text in the subject or body. However, if desired, you can prepopulate the Send Email page with some default text in either field. To do so, create a copy of this template, customize the copy, and assign it to the Ad-hoc Email event.

Approval Manager Deletion

First Name: The first name of the learner

Last Name: The last name of the learner

User Email ID: The email address of the learner

Approval Manager Updated

Approval Manager First Name: The first name of the learner's approval manager

Approval Manager Last Name: The last name of the learner's approval manager

Approval Manager User Name: The user name of the learner's approval manager

User Email ID: The email address of the learner

User First Name: The first name of the learner

User Last Name: The last name of the learner

User Name: The user name of the learner

New User Notification

Approval Manager First Name: The first name of the learner's approval manager

Approval Manager Last Name: The last name of the learner's approval manager

Approval Manager User Name: The user name of the learner's approval manager

First Name: The first name of the learner

Last Name: The last name of the learner

Password: The learner's password

SkillPort URL: The URL to the login page for SkillPort

User Email ID: The email address of the learner

Username: The user name of the learner

Self-registration Approved by Administrator

Password: The learner's password

SkillPort URL: The URL to the login page for SkillPort

User Email ID: The email address of the learner

User First Name: The first name of the learner

User Last Name: The last name of the learner

User Name: The user name of the learner

Self-registration Confirmation

Approval Manager First Name: The first name of the learner's approval manager

Approval Manager Last Name: The last name of the learner's approval manager

Approval Manager User Name: The user name of the learner's approval manager

First Name: The first name of the learner

Last Name: The last name of the learner

Password: The learner's password

SkillPort URL: The URL to the login page for SkillPort

User Email ID: The email address of the learner

Self-registration Denied by Administrator

User Email ID: The email address of the learner

Notification Settings

Use Notification settings to specify the **From** and **Reply to** email addresses in the email templates that support the notification management system. Note that you *cannot* change these addresses on a per-template basis.

To configure notification settings

1. Click **Configuration > Notification Settings** on the navigation bar.
2. Enter values for the following settings:
   - **Default 'From' email address for notifications**: (Required) The email address to use in the **From** field of all email templates, except those for Instructor Led Training (ILT).
   - **Default 'Reply-to' email address for notifications**: The email address to use in the **Reply To** field of all email templates.
   - **Default 'From' email address for ILT notifications**: The email address to use in the **From** field of all ILT email templates.

   Note: You can specify any email address, even if the associated individual does not have an existing Skillport user account.
3. Click **Save**.

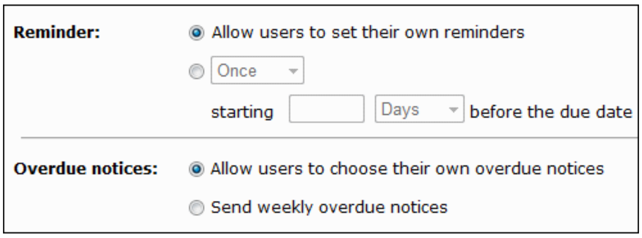
Learning Plan Settings

Learning Plan settings allow you to enable or disable certain Learning Plan features in Skillport.

To configure Learning Plan Settings

1. Click **Configuration > Learning Plan Settings** on the navigation bar.
2. Configure the settings as needed:

Setting	Description
Allow Learning Plan	Allows learners and administrators to set up reminders regarding Learning Plan

Reminders Allow Learning Plan Overdue Notices	assignments. Select **yes** to show the following reminder-related settings in the Learning Plan dialog boxes in both the Learner UI and the Administrator UI:  Alternatively, to hide these settings, select **no**. **Note**: This setting controls only the display of the settings. In order for the related reminder emails to be sent, you must also activate the corresponding Learning Plan emails in the Notification Management UI.
Allow Learning Plan Due Dates	Select one of the following: ▪ **required:** Learning assets added to the Learning Plan must have an associated due date. ▪ **no:** Learning assets added to the Learning Plan do not have associated due dates. ▪ **optional:** Learning assets added to the Learning Plan can have associated due dates, but they are not required.
Default Learning Plan View	Select one of the following: ▪ **Default to Basic:** When learners first open their Learning Plan, all sets within the Learning Plan are collapsed. ▪ **Default to Expanded:** When learners first open their Learning Plan, all sets within the Learning Plan are expanded to show all assets.

1. Click **Save**.

Search

You can control the way search results display in the following types of searches:

- Searches performed by learners in Skillport Learner
- Catalog searches performed by administrators in Skillport Administrator

To configure Search settings

1. Click **Configuration > Search** on the top navigation bar.

2. Configure the setting as needed:

   - **Search Categories – Order of Appearance**: The order that categories are returned within search results. To change the order, select a category, and then use the **Up** and **Down** arrows to change its location.

3. Click **Submit**.

Self-Registration

You can configure self-registration to allow learners to create their own Skillport accounts. When you enable this functionality, the self-registration page is available to learners.

To configure self-registration

1. Click **Configuration > Self-Registration** on the navigation bar.

2. In **Enable Self-Registration**, click **Yes**.

3. If you enable self-registration, you **must** also enable one of the following options:

   - **Use external security for Self-Registration:** Specifies whether external measures are used to limit access to the self-registration form. As an example, you might specify that the site be limited to a list of allowed IP addresses. This setting is read-only unless you are a super administrator. Note that, if you set this to **Yes**, the User Management - New User Notification event is not triggered when a user self-registers; therefore, the user does not receive a notification email.

   - **Comma separated list of allowed email suffixes:** Specifies a comma-separated list of allowed email suffixes. Only a user with an email address that contains a listed suffix is allowed to self-register without approval. If no list is specified, any user is allowed to self-register, but either approval is required or external security measures must be used.

     Example: company1.com,company2.com

     Allowed characters (maximum 1,500): abcdefghijklmnopqrstuvwxyz0123456789 - _ . * ^ + = @ '

     Be aware that email suffixes are case-sensitive; for example, MyName@Skillsoft.com is considered a different email address than myname@skillsoft.com. Also be aware that this setting takes precedence over the **Require admin approval for Self-Registration** setting. That is, if you specify a list of allowed email suffixes, but you also set **Require admin approval for Self-Registration** to **Yes**, a user who registers with an email address containing an allowed suffix is automatically approved and can log in to Skillport without administrator approval.

   - **Require admin approval for Self-Registration:** If you select **Yes**, users are allowed to self-register, but they are unable to log in until an administrator approves their registration, activating their accounts. If you select **No**, administrator approval is not required. A self-registered user's account is automatically activated, and he is notified via email.

     Be aware that this setting is ignored if you have specified a list of allowed email suffixes for **Comma separated list of allowed email suffixes**, and a user registers using an email address containing an allowed suffix. That is, the user is automatically approved and can log in to Skillport without administrator approval.

4. Configure the remainder of the settings:

- **Select Email Notification Template:** (Read-only) Identifies the template that is assigned to the User Management - New User Notification event on the Notification Management page. To change the template, you must assign a different one to the event. The default site language of your Skillport site determines which language-specific template is displayed in this setting and is used to send emails.
- **Send username in Self-Registration email:** Specifies whether to include the learner's user name in a self-registration email that is sent to the user.

  If you select **Yes**, the system programmatically includes the user name in all User Management - New User Notification email templates (see ***View Existing Templates*** on page 449). If you select **No**, the system programmatically removes the user name from all User Management - New User Notification email templates. As a result, you do not need to manually insert or remove a **Username** field from these templates.

  If you select **No**, ensure that you have not inadvertently manually included a **Username** field in any self-registration-related email templates. Since the user name should not be included or shown, this results in the following in the actual email:

  ```
  Username: $user.username
  ```
- **Comma separated list of Admin e-mail addresses:** Specifies a comma-separated list of email addresses for administrators with the Administrator role or higher (managers cannot approve pending registrations). If **Require admin approval for Self-Registration** is set to **Yes**, nightly notifications of registrations that are pending approval are emailed to these email addresses. The notification email contains a link to the Sign In page, which then redirects the administrator to the Pending Registrations page after sign in.

  Allowed characters (maximum 1,500): abcdefghijklmnopqrstuvwxyz0123456789 - _ . * ^ + = @ '
- **Select Email Pending Approval Template:** (Read-only) Indicates the template that is assigned to the User Management - Self-registration Confirmation event on the Notification Management page. To change the template, you must assign a different one to the event. The default site language of your Skillport site determines which language-specific template is displayed in this setting and is used to send emails.
- **Allow user defined password:** Specifies whether users can create their own passwords when they self-register.

  If you select **No**, when an administrator approves the user's registration (thereby activating the account), the user's password is set to a random value. In addition, the system programmatically includes the random password in all User Management - New User Notification email templates (see ***View Existing Templates*** on page 449). As a result, you do not need to manually include a **Password** field in these templates.

  If you select **No**, do not manually include a **Password** field in any User Management - Self-registration Confirmation email templates. This is because the user does not receive a random password until after an administrator approves his registration. If one of these templates does include a **Password** field, this results in the following in the actual email:

  ```
  Password: pending
  ```

  If you select **Yes**, the system programmatically removes the password from all User Management - New User Notification email templates. This is done because user-defined passwords are saved in encrypted form in the database. As such, they cannot be retrieved and displayed in an email. For this same reason, if you select **Yes**, do not manually include a **Password** field in any self-registration email templates.

5. Click **Submit**.

User Profile Fields

User profile fields are used to collect and store information about users. You can also include specific user profile fields in report filters to run reports on certain user demographics.

There are two types of user profile fields:

- **Standard**: Fields that are provided by Skillport. You cannot modify standard field definitions. For more information about these fields, refer to User CSV Template.

- **Custom**: Fields that you can create to gather additional user information that is not captured in the standard fields. You can create a maximum of 30 custom fields per site. If applicable for your site, you can also create localized prompts and localized select lists for the custom fields. For more information, refer to Create a Custom Field.

Edit a Standard User Profile Field

You can edit the access to standard user profile fields.

To edit a standard user profile field

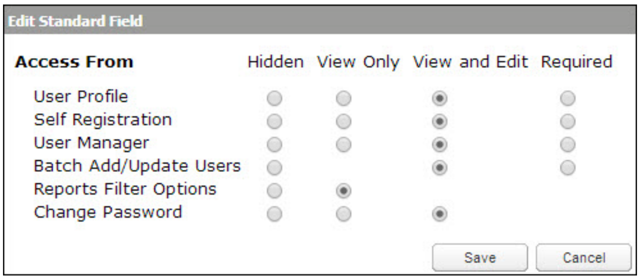
1. Click **Configuration > User Profile** on the navigation bar.

   The Manage User Profile Fields page displays.

2. In the **Standard Fields** section, select the field you want to edit.

3. Click **Edit**.

   The Edit Standard Field dialog box displays the information for the selected field.



4. In the **Access From** section, select one of the following options for each Skillport page listed:

- **User Profile**:
  - **Hidden**: The selected user profile field does not display on the My Profile page.
  - **View Only**: The selected user profile field displays as view-only on the My Profile page.
  - **View and Edit**: The learner can view and edit the selected user profile field on the My Profile page.
  - **Required**: The learner must enter a value for the selected user profile field on the My Profile page.
- **Self Registration**:
  - **Hidden**: The selected user profile field does not display on the Self Registration page.

- **View Only**: The selected user profile field displays as view-only on the Self Registration page.
- **View and Edit**: The learner can view and edit the selected user profile field on the Self Registration page.
- **Required**: The learner must enter a value for the selected user profile field on the Self Registration page.

- **User Manager**:
  - **Hidden**: The selected user profile field does not display on the User Management page.
  - **View Only**: The selected user profile field displays as view-only on the User Management page.
  - **View and Edit**: The administrator can view and edit the selected user profile field on the User Management page.
  - **Required**: The administrator must enter a value for the selected user profile field on the User Management page.
- **Batch Add/Update Users**:
  - **Hidden**: The selected user profile field does not display in the Batch Add/Update CSV file.
  - **View and Edit**: The administrator can view and edit the selected user profile field in the Batch Add/Update CSV file.
  - **Required**: The administrator must enter a value for the selected user profile field in the Batch Add/Update CSV file.
- **Reports Filter Options**:
  - **Hidden**: The selected user profile field does not display in the reports filter.
  - **View Only**: The selected user profile field displays as view-only in the reports filter.
- **Change Password** (Only available in the Email Address user profile field):
  - **Hidden**: The Email Address user profile field is hidden from learner access.
  - **View Only**: The Email Address user profile field displays as view-only and cannot be edited by the learner.
  - **View and Edit**: The learner can view and edit the Email Address user profile field in Skillport.

1. Click **Save**.

Create a Custom User Profile Field

You can create custom user profile fields to collect additional information about users. You can create a maximum of 30 custom fields for each Skillport site.

When you create a new custom field, the user CSV template is automatically updated to include the field.

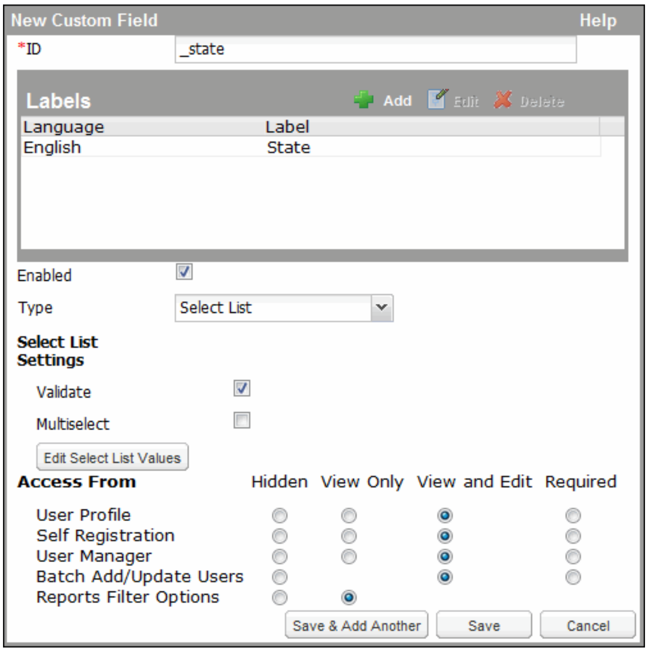
To create a custom user profile field

1. Click **Configuration > User Profile** on the navigation bar.

   The Manage User Profile Fields page displays.

2. In the **Custom Fields** section, click **New Field**.

   The New Custom Field dialog box displays.



3. (Required) In **ID**, enter a unique identifier for the custom field. You can enter a maximum of 256 single-byte characters. Valid characters are a-z, A-Z, 0-9, and '_' (underscore). This ID is included in the user CSV template and is also displayed in the learner UI if no label is specified for the field.

   Note: The prefix `_sys` is reserved for standard fields and cannot be used for custom fields.

4. (Optional) Enter the **Label** to display in the UI for the custom field.

   Ensure that you enter a meaningful label since it is displayed in several places in Skillport, including the Self-Registration page, the Manage User Profile Fields page, the New User and Edit User dialog boxes in User Management, and in reports.

   Note: If localization is available for your site, see Specify localized labels.

5. To allow the field to be configured for display in the user interface, select **Enabled**. By default, this option is selected.

6. In **Type**, select the data type for the field. Valid options are **Text**, **Integer**, **Date**, **Boolean**, **Select List**, and **Localized Select List**.

7. If you selected the **Type** as **Select List** or **Localized Select List**, specify the following options, if desired:

   - Select **Validate** to have the pre-defined data in the user CSV template validated during a batch add/update.

   - Select **Multiselect** to allow selecting multiple list items at once.

8. If you selected the **Type** as **Select List** or **Localized Select List**, specify the values to include in the list:

   Note: If localization is available on your site, see Specify localized list values.

   a. Click **Edit Select List Values**.

   b. In the Values dialog box, click **Add**.

   c. In the Add Value dialog box, enter the desired list value.

   d. To add another list value, click **OK and Add Another**, then enter the desired value.

   e. Click **OK**, then click **OK** again.

9. In **Access From**, click the desired option for displaying the field in Skillport. See Configure User Profile Settings for more information.

10. To save the custom field and keep the dialog box open to create another field, click **Save & Add Another**. Otherwise, click **Save**.

Edit a Custom Field

You can edit an existing custom user profile field to modify its properties.

To edit a custom user profile field

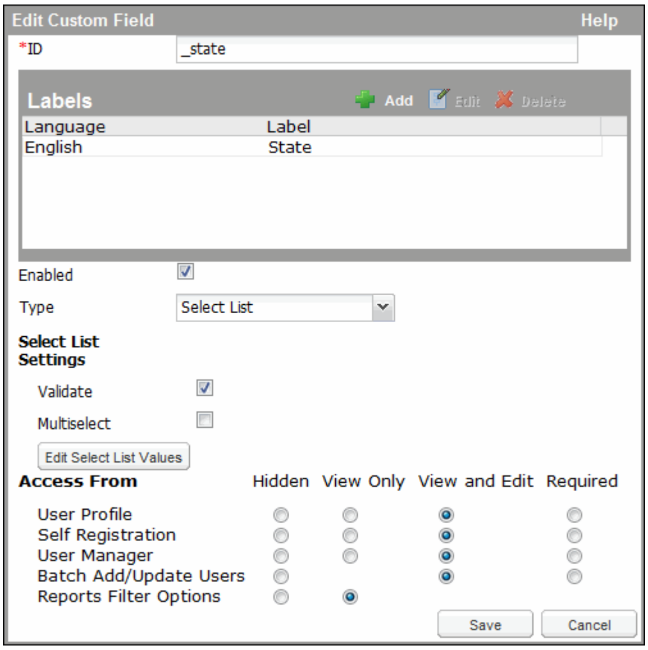
1. Click **Configuration > User Profile** on the navigation bar.

   The Manage User Profile Fields page displays.

2. In the **Custom Fields** section, select the custom field you want to edit.

3. Click **Edit**.

The Edit Custom Field dialog box displays the information for the selected custom field.



4. Edit the information as desired.

   For details about each field, see Create a Custom Field.

5. In the **Access From** section, select one of the following options for each Skillport page listed:

   - **Hidden**: Field does not display.
   - **View Only**: Field displays but cannot be edited.
   - **View and Edit**: Field displays and can be edited.
   - **Required**: Field displays and requires a value.

6. Click **Save**.

Specify Localized Values for Custom User Profile Fields

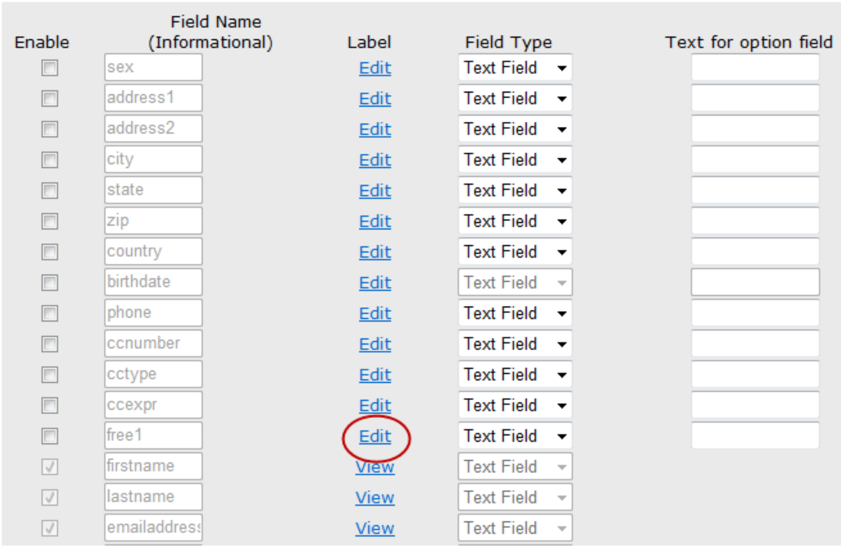
If your site is configured to support it, you can specify localized labels for custom user profile fields.

In addition, if your site supports localized labels, you can also specify localized values for drop-down lists.

To specify localized labels

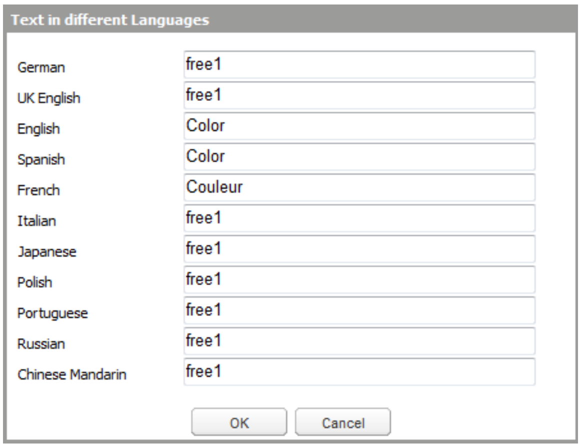
1. Click **Configuration | User Profile** on the navigation bar.

2. Find the field for which you want to enter localized labels.



3. Click the corresponding **Edit** link in the Label column.

4. Enter the values as shown below.

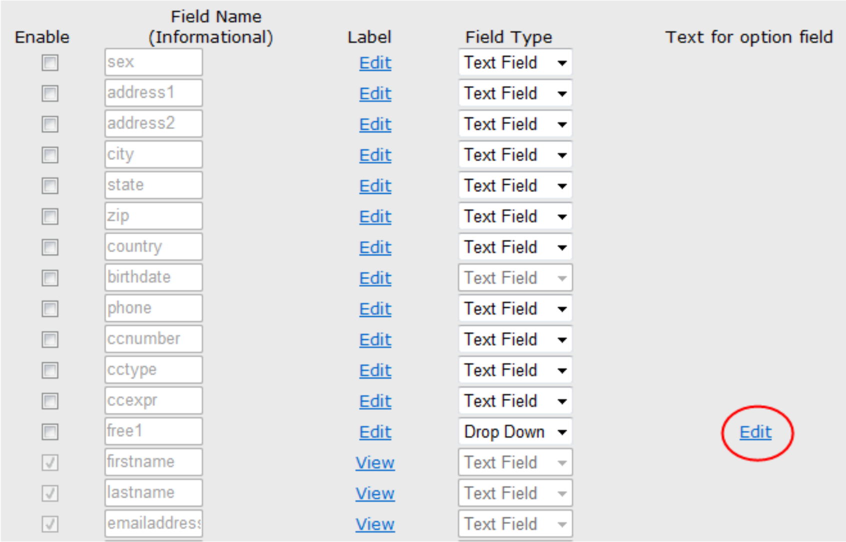


5. Click **OK**.

To specify localized values for drop-down lists

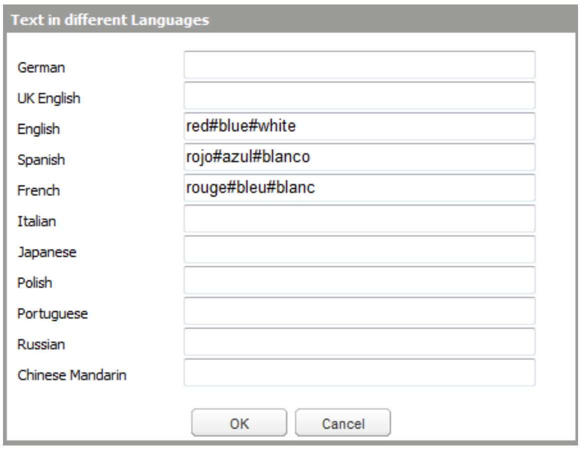
1. Click **Configuration | User Profile** on the navigation bar.

2. Find the drop-down list for which you want to enter localized values.



3. Click the corresponding **Edit** link in the "Text for option field" column.

4. Enter the values as shown below. As discussed in ***User Profile*** (on page 491), you must separate each value with a # character, and you can enter a maximum of 3,500 characters including the # symbols.



5. Click **OK**.

Delete a Custom User Profile Field

You can delete an existing custom user profile field only if no users have a value specified for that field.

To delete a custom user profile field

1. Click **Configuration > User Profile** on the navigation bar.

   The Manage User Profile Fields page displays.

2. In the **Custom Fields** section, select the field you want to delete.

3. Click **Delete**.

4. In the Confirm dialog box, click **Yes**.

Change the Display Order

You can change the order in which the custom user profile fields display in the Skillport user interface.

To change the display order

1. Click **Configuration > User Profile** on the navigation bar.

   The Manage User Profile Fields page displays.
2. In the **Custom Fields** section, click **Change Display Order**.
3. Select the desired custom field.
4. To move the field up one position in the list, click **Up**. Repeat as necessary until the field is in the desired position.
5. To move the field down one position in the list, click **Down**. Repeat as necessary until the field is in the desired position.
6. Click **Save**.

Batch Add/Update Custom User Profile Fields

You can use a batch process to add, delete, or edit multiple custom user profile fields at the same time. This is typically done to save time instead of having to add or update custom fields one at a time in the user interface.

To batch add/update custom user profile fields

1. Click **Configuration > User Profile** on the navigation bar.

   The Manage User Profile Fields page displays.
2. In the **Custom Fields** section, click **Batch Add/Update Fields**.

   The Batch Add/Update Custom User Profile Fields page displays.

3. Click **Download Field Definition Report**.
4. In the Download Field Definition Report dialog box, select which custom user profile fields to include in the downloaded file. Valid options are **All Fields** or **All Enabled Fields**.
5. Click **OK**.

6. Open the downloaded file, modify it as desired, and then save the file.

7. On the Batch Add/Update Custom User Profile Fields page, click **Browse** to navigate to the modified .csv file.

8. Click **Upload**.

9. Click **Back to User Profile Management**. Any updates made to the .csv file are reflected in the **Custom Fields** section.

Configure User Profile Settings

You can edit settings for both standard and custom user profile fields to specify how the fields display in Skillport.

- **User Profile**: Specify the fields available to users when editing the My Profile page.
- **Self Registration**: Specify the fields available on the Self-Registration form.
- **User Manager**: Specify the fields available when adding new users.
- **Batch Add/Update Users**: Specify the fields to include when performing a batch add/update.
- **Reports Filter Options**: Specify the fields available as a filter for reports that include user profile data.

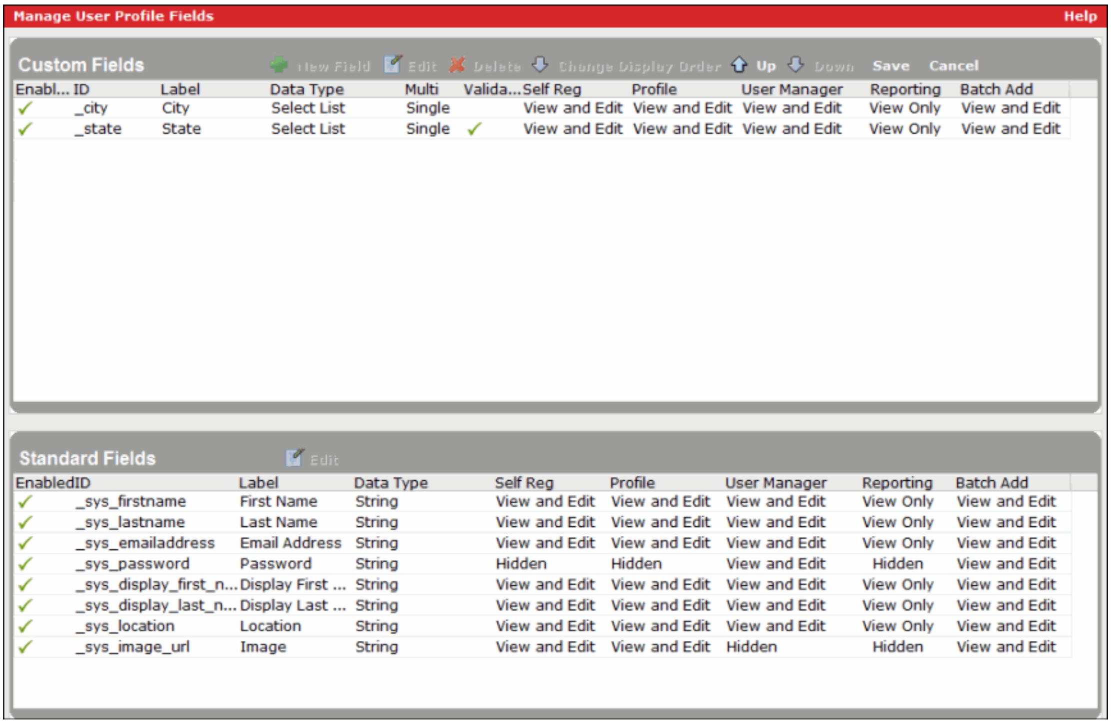
Note: It is best to enable only Custom Profile Fields for Report Filter Options if the field will contain a limited number of unique values. The User Profile Report Filter was designed to let you easily filter data such as Region, Job Code, Country or Business Unit. The filter presents a drop-down list of the first 200 alphabetically-sorted values that exist in the data. If the Custom Field has more than 200 values, you should Save the report and filter it in Excel. Be sure to include the Custom Field in Display Options.

Please carefully consider which user profile fields you enable for reporting purposes. If a user profile field is included in a saved Personal Report template, and you subsequently disable the field or clear **Report Filter Options**, the report templates that use this filter will no longer filter correctly for that field.

To edit user profile field display settings

1. Click **Configuration > User Profile** on the navigation bar.

The Manage User Profile Fields page displays.


Manage User Profile Fields Help

Custom Fields New Field Edit Delete Change Display Order Up Down Save Cancel

Enabl...	ID	Label	Data Type	Multi	Valida...	Self Reg	Profile	User Manager	Reporting	Batch Add
✓	_city	City	Select List	Single		View and Edit	View and Edit	View and Edit	View Only	View and Edit
✓	_state	State	Select List	Single	✓	View and Edit	View and Edit	View and Edit	View Only	View and Edit

Standard Fields Edit

Enabled	ID	Label	Data Type	Self Reg	Profile	User Manager	Reporting	Batch Add
✓	_sys_firstname	First Name	String	View and Edit	View and Edit	View and Edit	View Only	View and Edit
✓	_sys_lastname	Last Name	String	View and Edit	View and Edit	View and Edit	View Only	View and Edit
✓	_sys_emailaddress	Email Address	String	View and Edit	View and Edit	View and Edit	View Only	View and Edit
✓	_sys_password	Password	String	Hidden	Hidden	View and Edit	Hidden	View and Edit
✓	_sys_display_first_n...	Display First ...	String	View and Edit	View and Edit	View and Edit	View Only	View and Edit
✓	_sys_display_last_n...	Display Last ...	String	View and Edit	View and Edit	View and Edit	View Only	View and Edit
✓	_sys_location	Location	String	View and Edit	View and Edit	View and Edit	View Only	View and Edit
✓	_sys_image_url	Image	String	View and Edit	View and Edit	Hidden	Hidden	View and Edit

2. In either the Custom Fields section or the Standard Fields section, select the desired user profile field.

3. Click **Edit**.

   Either the Edit Custom Field dialog box or the Edit Standard Field dialog box displays, depending on which field type you selected.

4. In the **Access From** section, select one of the following options for the corresponding location.

   - **Hidden**: Field is not displayed.
   - **View Only**: Field is displayed, but cannot be edited.
   - **View and Edit**: Field is displayed and can be edited.
   - **Required**: Field is displayed and a value is required.

5. Click **Save**.

Language

The Configure Language Settings page allows you to set the default language for Skillport Learner and for Search. These settings apply to all users accessing your company's Skillport site for the first time. However, depending on the configuration of your site, users may be able to change their language settings from within the Skillport end user interface.

Note: User-defined language settings override company-wide settings.

To configure language settings

1. Click **Configuration > Language** on the navigation bar.
2. Select the language in which you want Skillport Learner to display:
   a. In the UI Language Setting section, select the language in which the interface text, help system, and system messages display to learners.
   b. Click **Change Language**.

   Note: By default, the interface language is set to English.
3. Select the default Search language in which you want your learners' search results to display:
   a. In Search Language Setting, select the default language used by Search. (During a search, users can change the language by selecting a new one from the **Language** drop-down list.)
   b. Click **Change Language**.

   Note: By default, Search is set to English (United States).

Note: The browser language setting affects the appearance of some screens and links. The text displayed may be different in some screens. For example, the **Forgot your user ID?** link on the Sign In page may be displayed as "forgotyouruserid" for a different language setting.

Report Configuration

If you are using the Reporting feature, you can use the Configure Report Parameters page to modify the Certificate of Completion settings.

To access this page, click **Configuration > Report Configuration** on the top navigation bar.

Click **Certificate of Completion** to open the Certificate of Completion - Attribute Modifications form. Use this form to change the appearance and content of completion certificates.

Field	Description
Allow users to generate certificates	Enable or disable the ability of users to generate completion certificates. If enabled, completion certificate links display in any reports that track completable assets.
Header Image URL	Specify an alternative graphic that is used as the top background graphic for the completion certificate.
Footer Image URL	Specify an alternative graphic that is used as the bottom background graphic for the completion certificate.
CSS (Cascading Style Sheet) URL	Customize the text font size and color of the certificate by modifying the style sheet.

To preview changes to your certificate's style and graphic, click **Test Modifications**.

Web Site Switches

Web site switches are settings to enable or disable certain features of Skillport.

Note: If you need to change these settings after the release of the site, please consult your Skillsoft representative.

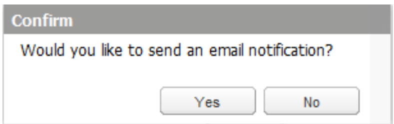
To configure web site switches

1. Click **Configuration > Web Site Switches** on the navigation bar.
2. Configure the settings.

- **Enable LP Enrollment/Withdrawal Emails:** Allows administrators the ability to control the learning program enrollment/withdrawal emails to users.

  Note: This setting is only applicable if you've activated the learning program emails on the Manage Notifications page in Skillport.

  - Select **Yes** to show the email-related prompts when enrolling and withdrawing users:

  - Select **No** to hide these prompts; emails are sent automatically.

- **Enable Credentials:** Enables Credentials for the site.
- **Enable Forced Restart:** Affects all instances of the following 2 types of assets:
  - Any course with the Allow Multiple Completions setting enabled.
  - Any asset that's been assigned to a learning plan as a Recurring by completion date or Recurring by due date.

  If your site supports either or both of these types of assets, you can set this switch as follows:

  - Select **No** to present the learner with a prompt to either restart the asset (launches the asset from the beginning, and the progress is recorded) or continue the asset (launches the asset from the last-accessed location, and progress continues to record).
  - Select **Yes** to allow the learner to launch a completed asset, and automatically create a new record in the learner transcript to count as the next completion. The learner is not given the option to continue (re-enter) the last completion.

  Note: For more information on restarting assets, see Recurring Assets (Compliance).

- **Enable Recommended for You Carousel**: Allows administrators to control the display of the Recommended for You carousel, which shows recommendations for popular and related assets to the learner, on the What's New page.
  - Select **Yes** to enable the Recommended for You carousel for the site. This is the default setting.

- Select **No** to disable the Recommended for You carousel for the site.

3. Click **Submit Form**.

Additional Deployment Options

The following additional options are also available. To enable these options, consult your Skillsoft representative.

Dialogue Live Virtual Classroom

This option adds the capability of Dialogue Live Virtual Classroom providing the ability to run blended learning training events for 25 students integrated with the Learning Management System (LMS) capability that the Skillport platform already offers.

Password

You can allow the learner to change his password by enabling this option.

Password Security Settings

You can enhance password security settings as follows:

- Enforce strong passwords (for example, minimum length and valid characters)
- Specify the length of time before a password expires
- Specify whether a failed login attempt leads to an account lockout
- Specify how users can retrieve forgotten user IDs or passwords

Customer Support Message

The Customer Support Message displays customer-specific support information and is used within error and/or warning messages. The Skillsoft Customer Support information is displayed by default.

The Customer Support Message is displayed in the following areas:

- Deactivated Users page
- Locked User page
- Reset Password page
- Send User ID

Note: The setting is site-wide; it cannot be customized differently for advanced groups.

CHAPTER 6

Reports

Use the Reporting features to gather data on all aspects of your Skillport learning management system. To access Reports, click **Reports** in the navigation bar.

In This Chapter

Getting Started with Reporting

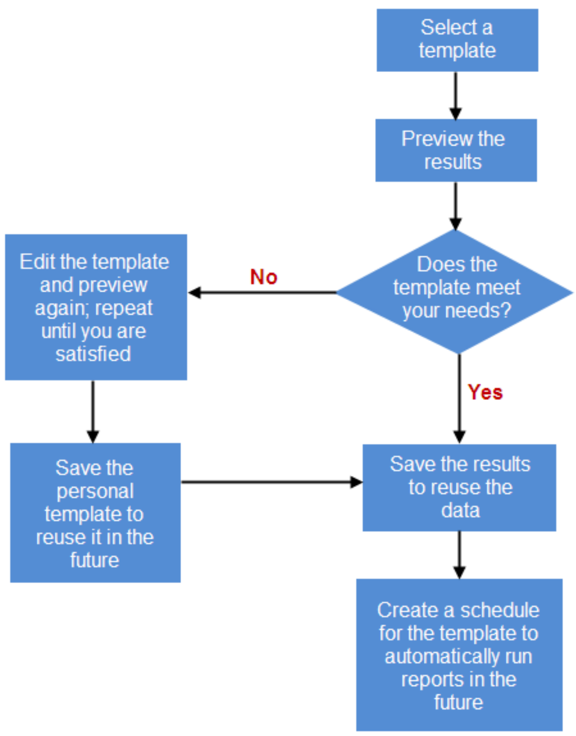
Reporting Overview

The following is a high-level overview of the reporting process.

1. Identify your reporting requirements.
2. Run several reports by previewing the default templates to determine if they meet your needs. The default templates are designed to quickly show the last month of activity and display the most commonly used data fields.

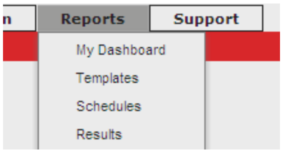
   Note: For a detailed explanation of all fields, filters, and display options included in each template, see Report Definitions.
3. For those default templates that meet your reporting needs you can save the results and you can create schedules to automatically run the report in the future.
4. If you need to further define the results you can create personal templates by modifying the default templates, and then, if desired, create schedules for those templates.

Reporting Overview Diagram



Reporting Interface

The Reports menu includes a link for each section of the reporting feature.



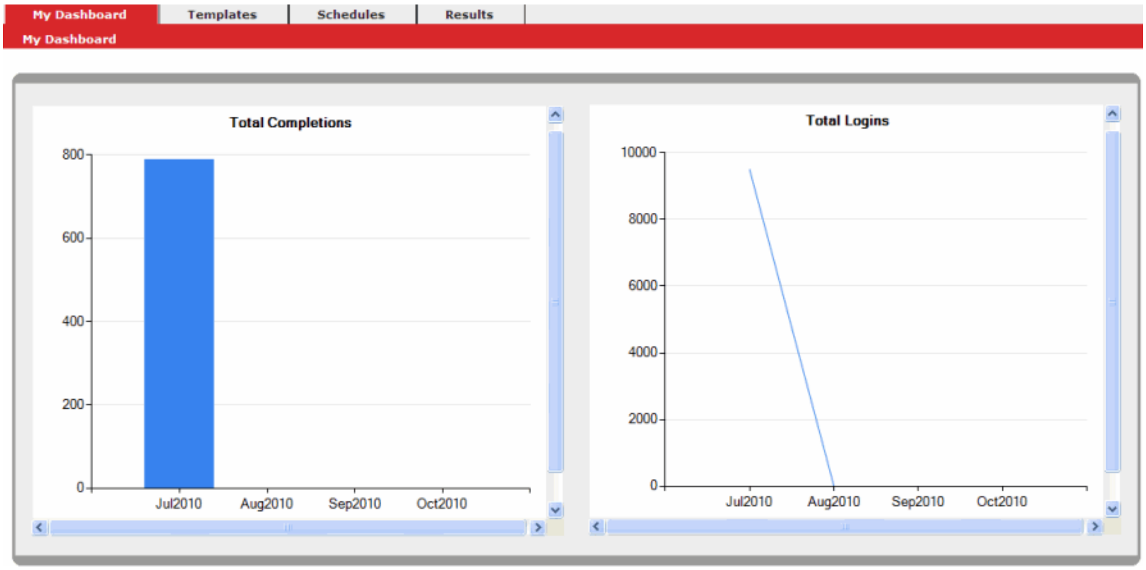
The following windows display for each menu option pictured above.

My Dashboard

The **My Dashboard** tab contains two predefined reports displayed in chart form.

The *Total Completions* chart displays the number of course and Learning Program completions that have occurred during the specified time frame.

The *Total Logins* chart displays the number of users that have logged in to the system during the specified time frame.

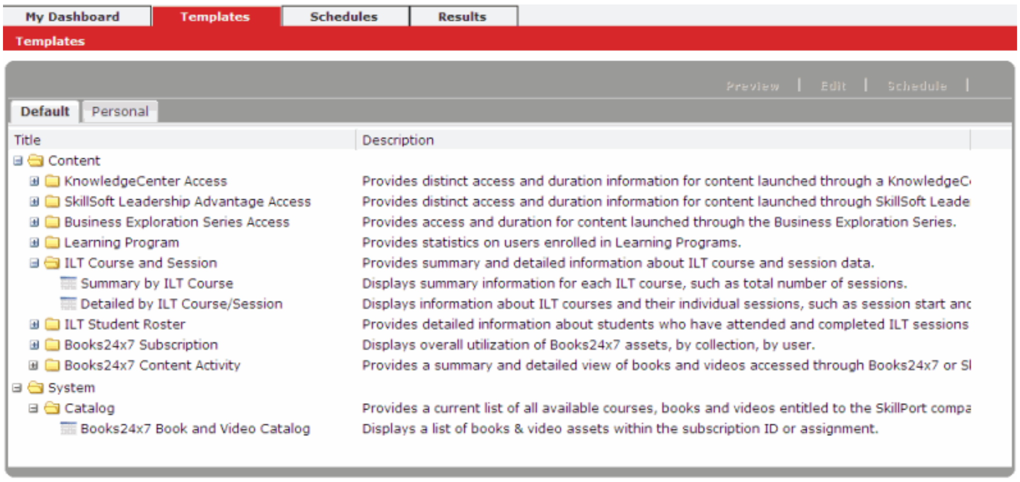


Templates

The Templates tab contains a list of all report templates available in the Reporting feature. Templates are forms used to determine what dates, filter options, and display options should be included in report results.

Default templates are pre-defined templates that are standard with all SkillPort implementations.

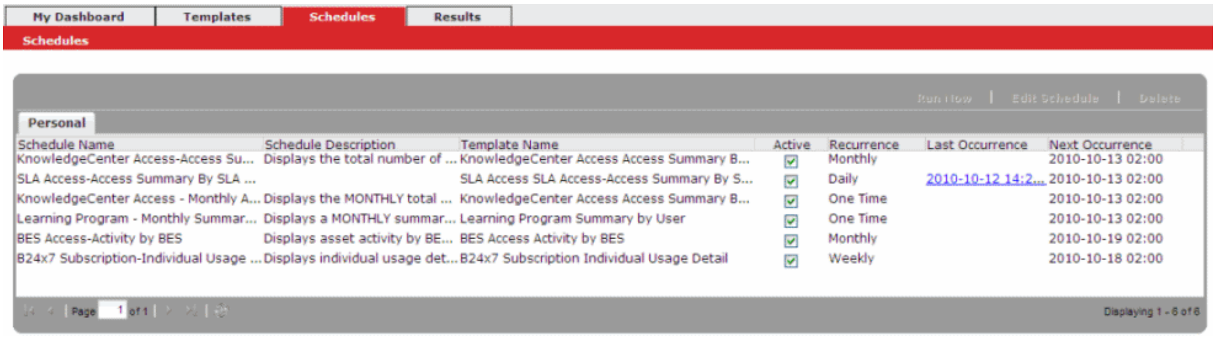
Personal templates are customized templates you create by modifying default templates.



Schedules

The Schedules tab contains a list of all schedules associated with report templates. Schedules are used to automatically run reports in the future.

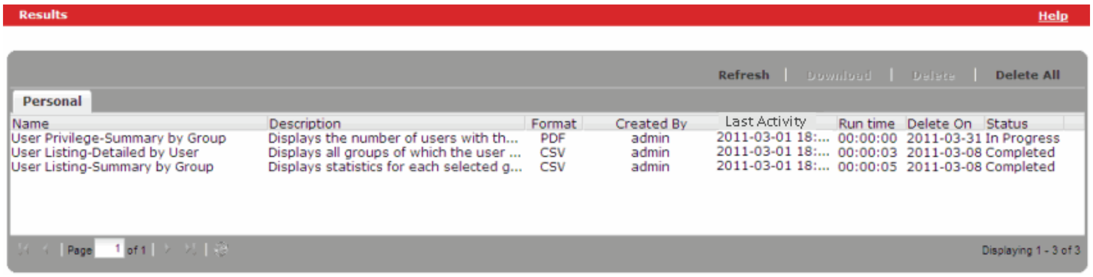
There are no default schedules included with Reporting. All schedules are created by the user. Schedules can be created for both Default and Personal Templates.



Results

The Results tab displays a list of all saved reports.

Reports are manually saved when you click the Save Results button, and automatically saved when a scheduled report is run.



User and Admin Privileges

User and Administrator privileges impact Reporting in two ways:

- by controlling which *groups and users* are visible in the Group/ User filter
- by controlling the report *results* returned in terms of student activity

Groups Visibility

The display of groups within the Group/Users filter is controlled by the **User/Group Filter Scoping** option in the Skillport Administrator UI.

When this option is **enabled** (checked), the standard Skillport user privileges apply. Visibility of groups and users is controlled by the user's role. For more information see ***User Privileges by Role*** on page 22.

When this option is **disabled** (unchecked), users have greater visibility of the company's *group* (organizational) structure within the Group/Users filter. The following rules apply:

- **Company Administrator** - Can see all Groups (including Assignment and Advanced Groups), and All users
- **Administrator** – Can see all Groups (including Assignment Groups) and users within their organizational scope.
- **Manager** – Can see all Groups (including Assignment Groups) and users within their organizational scope.

Report Results

The User/Group Filter Scoping option has no affect on the **results returned** for student activity. Results are always controlled by the standard Skillport reporting privileges. Report results will include only data for those students a user has permission to view.

In other words, it is possible to see particular users in the Group/Users filter, but still not be able to see data for those users. Running a report with only these users selected can cause an empty result set.

Note: Only Super Administrators can change the scoping rules. As with all User / Group modifications, changes made to this setting will not take effect until after the next database refresh.

About inGenius Reports

When running an inGenius report, Community Administrators can only see results for their communities. Company Administrators can see results for all inGenius communities.

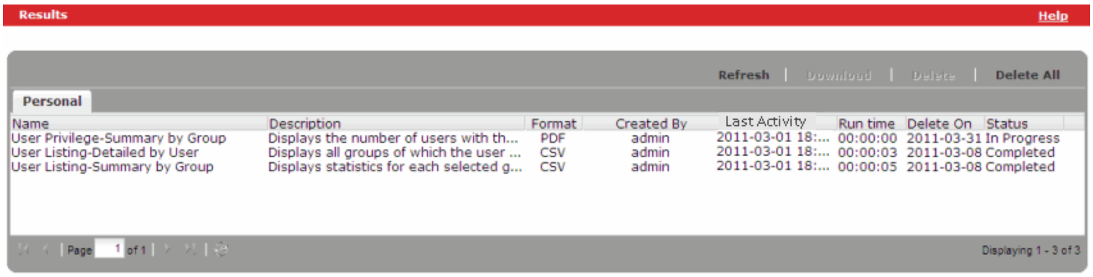
Managing Reports

Understanding Reports

In the Reporting documentation, 'report' refers to the formatted and organized presentation of the data, or results, returned when a query is sent to the database. You can:

- Run a report**.** When you run a report, the results display in a preview screen. This view is temporary and you must save the results in order to maintain the data.
- Save the report results. Saving results stores them on the Results window as shown below.
- Schedule a report to automatically run in the future. When a report is generated from a schedule, the results are automatically saved to the Results window.
- Create a Personal template to customize the report results.

The Results Window



Results are listed in the order the report was run with the most recent at the top. The Results window includes the following columns:

- **Name** - If generated from a scheduled report, this field displays the name of the report that generated the result. If a user runs a report and saves the result, this field displays the name entered by the user in the Save Result dialog. If a report has a recurring schedule associated with it, there may be more than one report result with the same name.
- **Description** - Can be modified by the user when the result is saved, or when the schedule for the report is created.
- **Format** - HTML, CSV, Excel, or PDF. Determined by the user when the result is saved, or when the schedule for the report is created.
- **Created By** - The name of the user that ran the report, or created the schedule.
- **Last Activity** - The date and time the report was run, reported in GMT.
- **Run time** - The length of time in hh:mm:ss it took for the report to run.
- **Delete On** - The date the results will automatically be deleted from the Results window.
- **Status** - The status of the result. ie: In Progress, Completed, etc. This field also displays warning messages. For example, if an email notification fails, a message will indicate which user(s) did not receive the notification.

From the Results window you can:

- **Refresh** the screen to update the list of saved results.
- Download the report results**.** Downloading results saves them to your hard drive or external storage device.
- Delete a saved report result.
- **Delete All** report results.

Note: The results of each report reflect the current data held in Skillport as of the last successful database refresh which occurs automatically. It is Skillsoft's commitment to ensure that customer reporting data is updated within 24 hours. In general, database refreshes (ETL's) run several times a day. This includes group structure, user status, asset status, assignments, enrollments, approvals, and data from other platforms.

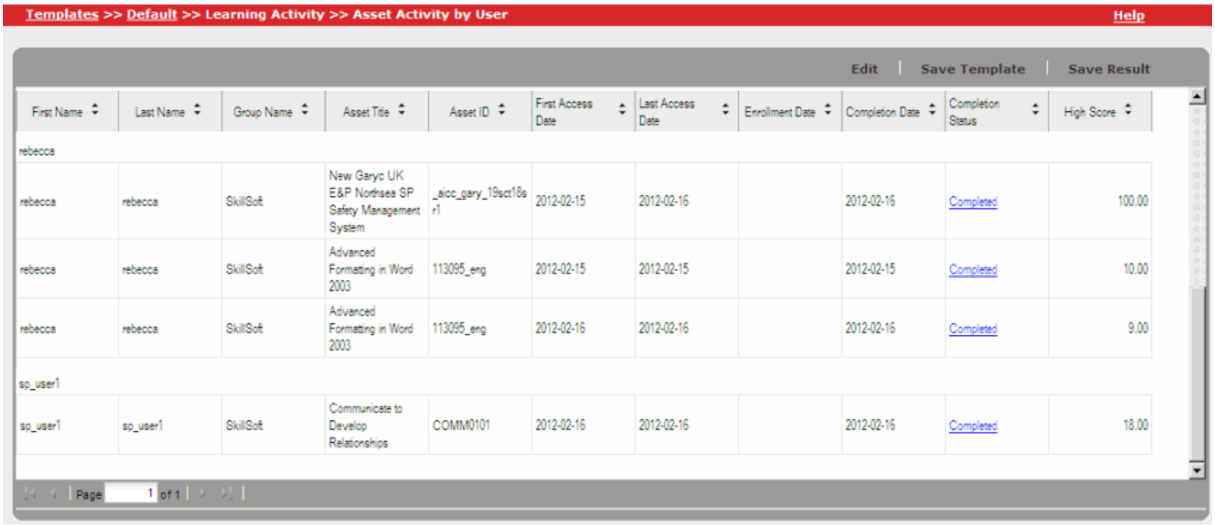
Run a Report

When you manually run a report you are actually previewing the results. This allows you to determine whether or not the report meets your needs before you save the results, or create a schedule to run the report in the future. The preview is temporary and you must save the results in order to maintain the data. You can also manually run a report from a schedule in the Schedules tab.

To run a report

1. From the Reports menu, click **Templates**.
2. In the Templates window select either the **Default** or **Personal** tab.
3. Select the desired template.

4. Click **Preview**. The results displays in the Preview window.



First Name	Last Name	Group Name	Asset Title	Asset ID	First Access Date	Last Access Date	Enrollment Date	Completion Date	Completion Status	High Score
rebecca										
rebecca	rebecca	SkillSoft	New Garyc UK E&P Northsea SP Safety Management System	_aicc_gary_19sct18s r1	2012-02-15	2012-02-16		2012-02-16	Completed	100.00
rebecca	rebecca	SkillSoft	Advanced Formatting in Word 2003	113095_eng	2012-02-15	2012-02-15		2012-02-15	Completed	10.00
rebecca	rebecca	SkillSoft	Advanced Formatting in Word 2003	113095_eng	2012-02-16	2012-02-16		2012-02-16	Completed	9.00
sp_user1										
sp_user1	sp_user1	SkillSoft	Communicate to Develop Relationships	COMM0101	2012-02-16	2012-02-16		2012-02-16	Completed	18.00

5. In the Preview window you can:

   - Sort the data by clicking the column headers.

   Note: Changes to the sort order are not maintained when saving results.

   - **Edit** the template to modify the dates, filters and display options in order to create a personal template.
   - **Save Template** if this template has been modified.
   - Save Result of the report to the Results tab.

To manually run a scheduled report

1. From the Reports menu, click **Schedules**.
2. Select the desired schedule.
3. Click **Run Now**. The report will be saved to the Results window at the top of the list.

Notes:

- Reports with a large amount of data may take several minutes to generate a preview.
- In some instances, if the report contains no data the column headers will still display, but with empty rows.
- Reports can also be previewed from a Template window.
- Reports run from schedules do not display in the Preview window.
- Some Content Activity and Learning Activity reports contain a 'Completion Status' column. If the Completion Certificate option is enabled in Skillport, a **Completed** value in this column will be a hyperlink that allows you to view the certificate in a separate window. You can print the certificate from the File menu of the new window.

Save a Report

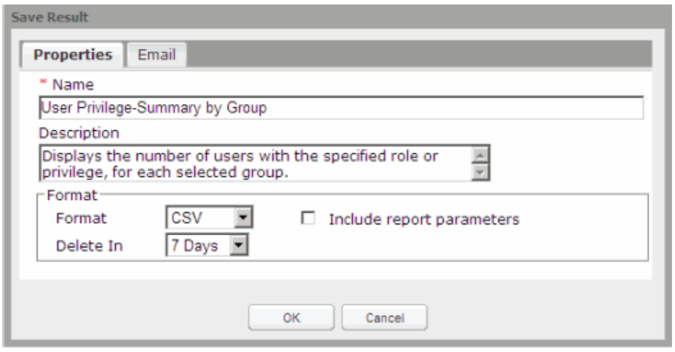
Saving a report allows you to view the results at a later date without the need to re-run the report.

To save a report

1. Click **Templates** and select either the **Default** or **Personal** tab.
2. Select the desired template.
3. Click **Preview**. The Preview window displays the results.
4. Click **Save Result**.

   You can also save the result from the Edit Template window.

   The Save Result dialog displays with a Properties tab and an Email tab.

5. In the **Properties** tab, complete all fields as described below.

   - **Name** - (Required) Modifiable field pre-populated with the name of the saved template. Max character limit is 120. Cannot contain the following characters: \ / : * ? " < > |; {}
   - **Description** - Modifiable field pre-populated with the description from the saved template. Field can be blank. Max character limit is 512.
   - **Format** - Available options: HTML, CSV (default), PDF, Excel. Chart templates can only be saved in the PDF format.
   - **Delete In -** Determines when the report will be automatically deleted from the Reporting interface. Choices include: 7 Days (default), or 30 Days. To store a report for longer than 30 days, use the Download option.
   - **Include Report Parameters -** When checked, parameters such as template name, description, date generated, input options, and last successful database refresh will display in the results. Default is unchecked. You cannot include parameters in reports saved as a CSV file.

     Note: Saving a report in the Excel format with **Include report parameters** checked causes columns to merge and the output is difficult to read.

   - If desired, click the **Email** tab to configure the Email Notifications feature.

6. Click **OK**. The Results window opens with the saved report displayed at the top of the list. If you are saving the result of a chart template accessed from the dashboard, the Results window will not open.

Note: If you are saving the results from the Edit Template window, the template changes will not be saved. You must save the template first in order to maintain the changes.

Email Notifications

When saving report results or creating or editing a schedule, you can configure the Email Notification feature to automatically send an email to the Skillport users of your choice, each time the report runs.

About the Recipients

- Any users with an active Skillport email address can be selected to receive a notification email, regardless of user privileges.
- Users without a Skillport email address display in red and cannot be selected.
- If a recipient's email address is subsequently removed from an account, the next time the report runs a warning will display in the Status column of the Results page.
- The Email Notification feature stores the User ID of selected recipients. Therefore, if a user's email address changes, the user will receive the email notification at the new address.
- If the Administrator account you are using to create the report has an email address, your own account is automatically added to the distribution list, but can be removed.

About the Email

- The email will include a link to the report results.
- Access to the report is controlled by Skillport user id.
- If the recipient is already logged into Skillport, the user will have immediate access to the report results.
- If the recipient is not logged in, the Skillport login interface will display. After login, the user will have access to the results.
- Only the users selected to receive the link will be able to use it to access the report.
- If an unauthorized user attempts to use the link:
  - If the user is already logged in to Skillport, the message, "User is not authorized to download this report" displays.
  - If the user is not logged in to Skillport, the login page will display. After login, the Home page will remain open and the user will not have access to the results.

The Email Notification feature is unchecked by default.

Configure Email Notifications

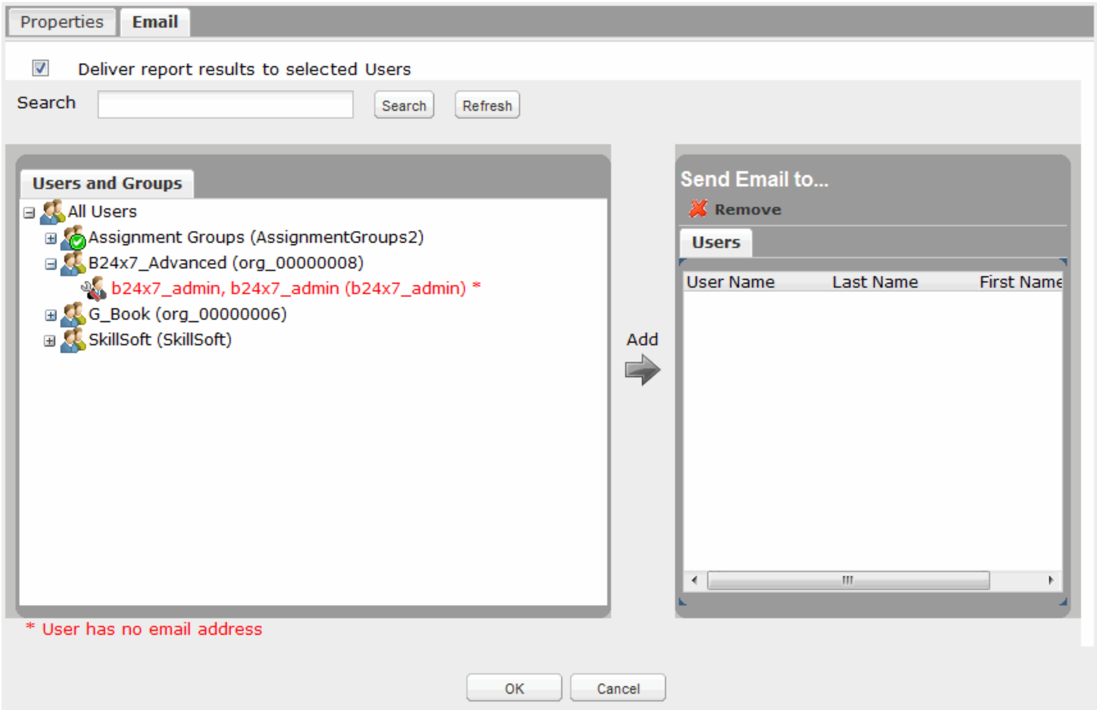
To configure Email Notifications for Reports

1. In the Skillport Admin menu, click **Reports > Templates**.
2. Select a template from the list.
3. Click **Schedule**.

4. In the Save Schedule dialog, click the **Email** tab.

5. Click **Deliver report results to selected users** to display the Users and Groups selector.

Note: This check box is unchecked by default.



If desired, use **Search** to display specific users in the Users and Groups pane.

6. In the **Users and Groups** pane, select the desired user(s). The Add arrow enables.

Note: You can select multiple users to add to the list, but you cannot select Groups of users. Users listed in red do not have an email address and therefore cannot be added to the list.

7. Click **Add**. The selected users are added to the list.

8. Click **OK**.

To remove users from the list

1. In the **Send Email to...** pane, click the users' name.

2. Click **Remove**.

Note: The Email Notification feature is also available in the Save Results dialog.

Download a Saved Report

Reports saved on the Results tab can be saved for a maximum of 30 days. To save the report past the delete date you can download it to your hard drive or external storage device.

To download a report

1. From the Reports menu, click **Results**.
2. Select the desired report result.
3. Click **Download.**
4. Use your browser's save options to save the results to your local storage device.

Note: When downloading a CSV report, the file name (including the file path) should be a maximum of 218 characters. CSV file names with more than 218 characters may not open in some browsers.

Delete a Saved Report

Saved reports will automatically delete according to the *Delete On* date that was created when the report was saved. However, you can manually delete a report from the Results tab as needed. The corresponding template and schedule (if one exists) are not deleted.

Note: The maximum amount of time a report can be stored in the Results tab is 30 days. If you need to access a report past the *Delete On* date, use the Download option to save the report to your hard drive or external storage device.

To delete a report

1. From the menu click **Results**.
2. Select the desired report result.
3. Click **Delete**.
4. Click **Yes** in the confirmation message. The report is removed from the list.

Optionally, you can delete all the results simultaneously by clicking the **Delete All** button.

Managing Schedules

Understanding Schedules

Schedules are used to automatically run a report in the future. Schedules can be created for both Default and Personal templates. Each schedule can have only one template associated with it at a time. You can create a schedule to run once, or on a daily, weekly, or monthly basis.

Saved schedules display in the **Schedules** window.

Schedules are listed in order by *Next Occurrence* date, with the schedule set to run next at the top of the list. The Schedules window includes the following columns:

- **Name** - The name of the schedule also determines the name of results created by the schedule.
- **Description** - User defined.
- **Template** - The default or personal template associated with the schedule.
- **Created By** - The name of the user who created the schedule.
- **Active** - Whether or not the schedule is currently active. You can check or uncheck to modify the setting.
- **Recurrence** - Reflects if the report is scheduled to run once, daily, weekly, or monthly.
- **Last Occurrence** - The last date the report was run from this schedule. If the results have not been deleted, this value will be a hyperlink to the report on the Results tab.
- **Next Occurrence -** The next date the report is scheduled to run.

From the Schedules tab you can:

- Sort the list by clicking the Schedule Name, Schedule Description, or Template Name column headers.
- Click **Run Now** to run the report immediately and save the results to the Result window.
- Edit the schedule.
- Activate, or deactivate a schedule by checking or unchecking the associated check box. Active schedules will run reports at the scheduled time. Inactive schedules will not run reports.
- Delete a schedule. Expired schedules must be deleted manually. A schedule is considered expired if the *End by* date has passed.
- **Delete All** schedules simultaneously.

Understanding Date Settings

Before creating a schedule there are several important factors to consider when selecting the schedule start and end dates.

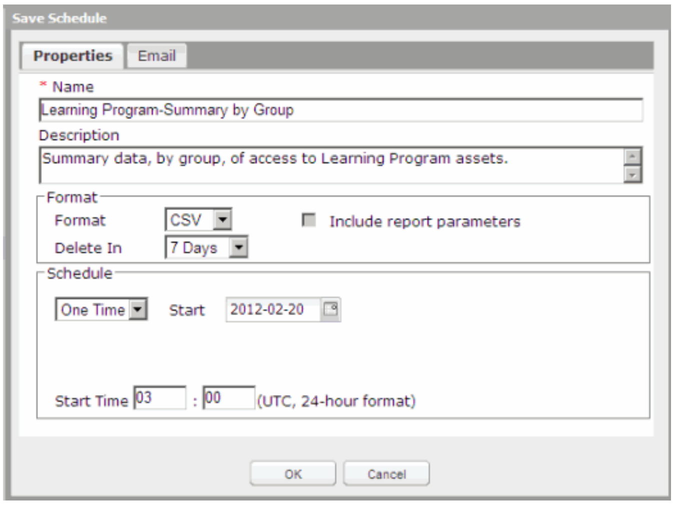
- The start date determines when the schedule becomes active. The start date combined with the frequency of the schedule may cause an unexpected result. For instance, if you create a weekly schedule to run a report every Monday, but the start date is a Wednesday, then no report will be created in that first week.
- Activity Date filters will also affect the results of a scheduled report. For instance, if the schedule determines the report should run monthly, but the Activity filters are set to the "Previous 2 Weeks", then the report will not include data for the two missing weeks.
- In order to generate current data each time the report is generated, make sure the Activity Date filters are set to one of the "Previous" options. If you select the From/To options and include both a start and end date, each time the report runs the results will be the same since the dates will not update.
- The time zone for all schedules is the standard UTC time. If you select a different time zone in the template display options, the results generated from a schedule may not reflect the most recent activity.

Create a Schedule

Before creating a schedule, it is important to understand how the schedule dates and the template date filters relate to each other. See ***Understanding Date Settings*** on page 512 for more information.

To create a schedule

1. Click **Templates** and select either the **Default** or **Personal** tab.
2. Select the desired template.
3. Click **Schedule**. The Save Schedule dialog displays with a Properties tab and an Email tab.



4. In the **Properties** tab complete all fields as described below.

- **Name** - (Required) Modifiable field pre-populated with the name of the saved template. Creates the name of the schedule **and** the name of the report generated by the schedule. Max character limit is 256. Accepts alphanumeric characters only. Does not support the use of any special characters.

- **Description** - Modifiable field pre-populated with the description from the saved template. Field can be blank. Max character limit is 512.

- **Format** - Determines the format of the saved report generated by the schedule. Choices include: Excel, HTML, CSV (default), PDF. When opened, a saved report displays in the viewer associated with the file type on the user's machine.

  Note: Reports saved in the Excel format may have an extra column in every row. You cannot hide this column in the report template, however you can remove the column once you open the report in Excel.

- **Delete In** - Determines when the report generated by the schedule will be automatically deleted from the Results tab. Choices include: 7 Days (default), or 30 Days. To store a report for longer than 30 days, use the Download option.

- **Include report parameters -** When checked, parameters such as template name, description, date generated, input options, and last successful database refresh will display in the report generated by the schedule. Default is unchecked. Cannot include parameters in a CSV file.

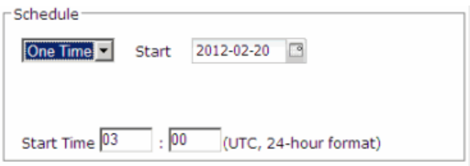
  Note: Saving a report in the Excel format with **Include report parameters** checked causes columns to merge and the output is difficult to read.

5. In the **Schedule** section, select the type of schedule you want to create from the drop down. Complete all fields as described below.

Note: The time zone for all schedule Start times is UTC.

One Time Schedule

Create a one time schedule if you only need a snapshot of the data for one period in time.



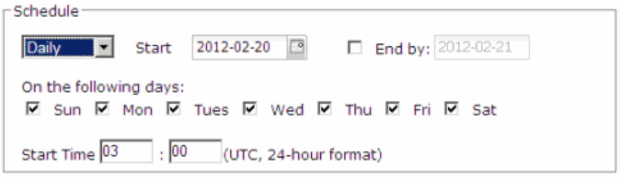
Complete all fields as described below.

- **Start** - (Required) Determines the date the schedule should become active. The schedule will run the report once and not reoccur. Default is current day's date.

- **Start Time** - (Required) Determines the time of day the report will be queued for execution. Default is 2:00 AM UTC time.

Daily Schedule

Create a daily schedule if you need the report to run on more than one day a week.

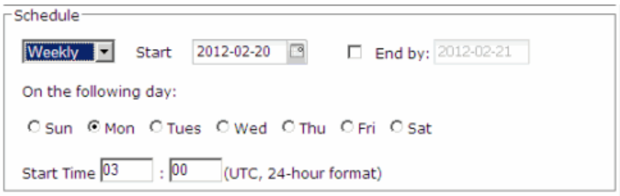


Complete all fields as described below.

- **Start** - (Required) Determines the date the schedule should become active. Default is current day's date.
- **End by** - Determines the date the schedule becomes inactive and reports stop running. If left blank, the report will reoccur indefinitely.
- **On the following days** - Determines which days of the week the report will run. Select one or more days.
- **Start Time** - (Required) Determines what time of day the report will be queued for execution. Default is 2:00 AM UTC time.

Weekly Schedule

Create a weekly schedule to run the report on only one day of the week.

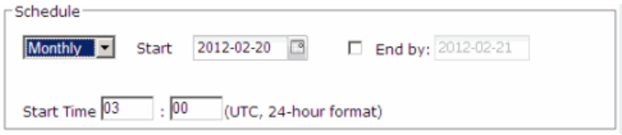


Complete all fields as described below.

- **Start** - (Required) Determines the date the schedule should become active. Default is current day's date.
- **End by** - Determines the date the schedule becomes inactive and reports stop running. If left blank, the report will reoccur indefinitely.
- **On the following day** - Determines which day of the week the report will run. Select only one day.
- **Start Time** - (Required) Determines what time of day the report will be queued for execution. Default is 2:00 AM UTC time.

Monthly Schedule

Create a monthly schedule to run the report on the same day of each month.



Complete all fields as described below.

- **Start** - (Required) Determines both the date the schedule becomes active and the day of the month the report will run. If the date is 29, 30, or 31 the report will not run for months that do not contain that date.
- **End by** - Determines the date the schedule becomes inactive and reports stop running. If left blank, the report will reoccur indefinitely.
- **Start Time** - (Required) Determines what time of day the report will be queued for execution. Default is 2:00 AM UTC time.

If desired, click the **Email** tab to configure the Email Notifications feature.

6. Click **OK**. The schedule displays on the Schedules window.

Activate or Deactivate a Schedule

You can make an existing schedule active or inactive on the Schedules window without opening the schedule. Inactive schedules will not run reports. Active schedules will run the associated reports as long as the *End by* date has not passed.

To activate or deactivate an existing schedule

1. From the Reports menu, click **Schedules**.
2. Select the desired schedule.
3. In the **Active** column click in the check box to modify the setting (add check for active, remove check for inactive).

Edit a Schedule

Existing Schedules can be edited to modify the name, description, format and frequency of the schedule. However, you cannot modify which template is associated with the schedule.

To edit a schedule

1. From the Reports menu, click **Schedules**.
2. Select the desired schedule.

3. Click **Edit Schedule**. The Edit Schedule dialog opens with all fields populated with the current settings.

4. Modify the settings as desired. See ***Create a Schedule*** on page 512 for a description of all fields.

5. Click **OK**.

Note: If you change the name of the schedule, the name of any existing reports based on that schedule does not change. However, subsequently generated reports will use the new schedule name.

Delete a Schedule

If you no longer need a scheduled report to run, or a schedule expires, you can delete it from the Schedules window. If a schedule is deleted, any corresponding results will not be deleted until the specified *Delete On* date.

To delete a schedule

1. From the Reports menu, click **Schedules**.

2. Select the desired schedule.

3. Click **Delete**.

4. Click **Yes** in the confirmation message.

Optionally, you can delete all schedules in the list by clicking the **Delete All** button.

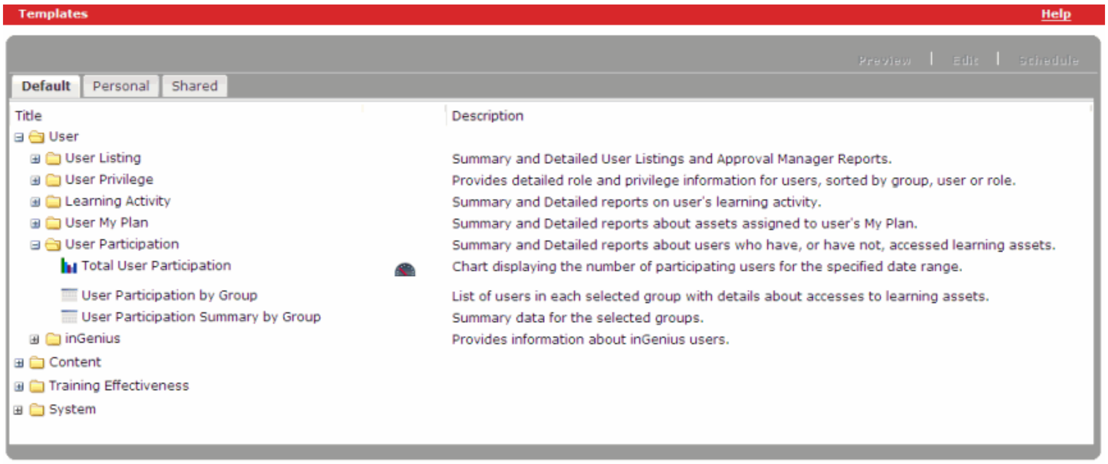
Managing Templates

Understanding Templates

Templates are forms used to determine what dates, filter options, and display options should be included in report results. The Reporting tool includes several Default Templates that contain predefined filter and display options and are designed to provide the user with 'out of the box' reporting functionality.

The Default templates can be edited in order to customize the data returned. You can save the customized templates to create Personal Templates, and you can share your Personal Templates.

All templates are stored on the **Templates** window.



The Templates window is divided into three tabs with system defined templates on the Default tab and user defined templates on the Personal tab. Shared templates display on both the Personal, and the Shared tabs.

Templates are categorized by the type of data they report on, such as Content and System data. These categories are further divided into subgroups. For instance, the User category includes template subgroups for reporting on specific User information such as Learning Activity, and User Participation.

On the Default Templates tab you can:

- Expand the category folders to see a brief description of each template.
- Determine which charts are currently displayed on the dashboard.
- Preview the report results to verify whether or not the report meets your specific needs.
- **Edit** the template by customizing filters and display options in order to create a personal template.
- Schedule a report to automatically run in the future.

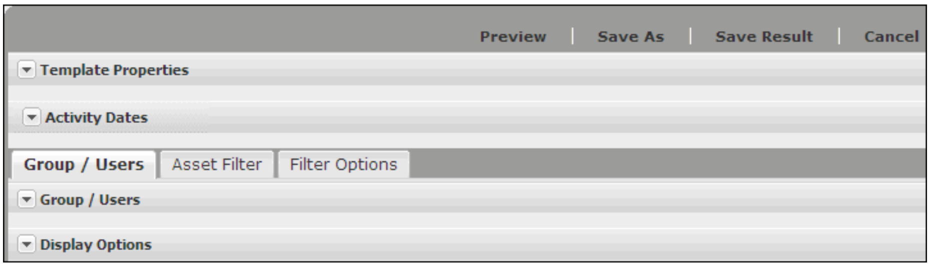
The Personal Templates tab provides options for deleting and sharing templates, and the Shared Templates tab provides options for deleting and unsharing templates.

Create a Personal Template

In order to meet your specific reporting needs, you can modify the input filters and display options included in a default template and then save the new template to create a personal template. There is no limit to the number of personal templates you can create from each default template. You can also create new personal templates from existing personal templates.

To create a personal template

1. From the Reports menu, click **Templates**.
2. Select the desired template.
3. Click **Edit**. The following page isplays:



Note: Not all filter options are available in all templates.

4. If desired, click the following tabs or drop downs to access the associated filters:
   - Activity Dates - specifies what period in time the report should include.
   - Group / Users - returns data only for the selected groups or users.
   - Asset Filter - returns data only for the selected asset types.
   - Filter Options - a variety of filters for selecting criteria such as assignment and access dates, specific Skillport user and group information, completion status, etc.

   Note: Template Properties is a read only list.

5. If desired, click Display Options and determine what column headers the report will include, and how the data will display.
6. Optionally, you can run the report to **preview** the results before saving the template to determine if it meets your needs, or you can save the results.
7. To save the template, click **Save As**. The Save As dialog displays.
8. Enter a **Name** for the personal template. Name field is mandatory and cannot contain more than 120 characters. The following characters are not allowed: \ / : * ? " < > | ; {}
9. Enter a **Description** of the template, if desired. Maximum character limit is 512.
10. Click **OK**. The new template will be saved to the Personal tab and a message will prompt you to create a schedule for this template.
11. Click **Yes** to create a schedule or **No** to display the Personal template tab.

Understanding Filters

There are several different filters available to help refine and customize report results. Filters can be used to return very broad sets of data that give you an overview of your Learning Management System (LMS), and they can be used to return very specific sets of data within your LMS environment. For instance, you may want to get an overview of how many users actually log into the system each month, or you may want to see specific data on which assets user John Doe completed in the last month.

All filters are accessed within the template window when you create a personal template.

- Activity Date Filters - allow you to determine what period in time the results should include.
- Group and User related filters - allow you to select specific groups, subgroups, or users and to filter by data such as user status.
- Asset related filters - allow you to display results for specific assets, asset sub-types, and to filter by data such as completion status, Books and Videos collections, etc.
- Additional Filter Options - a variety of filters including:
  - ***Custom filters*** on page 536 - allow you to select an option, enter a value, and use an operator to display only data that matches the specific criteria, such as times accessed > 5.
  - Event Filter Date Ranges - allow you to select one event and then select a date range for that specific event.
  - User Profile Filters - allow you to filter data by selecting values assigned to user profile settings.
- inGenius Community Filter - available for inGenius report templates only. Allows you to filter by one or more communities.

Filters are report specific and not all filters display for every report. For a complete listing of all filters available for each report, see Report Definitions.

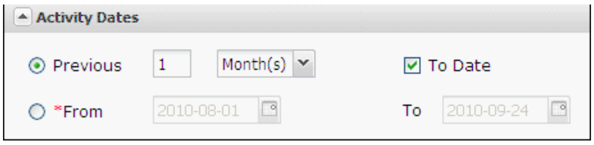
Note: It is possible to select filter options that will return an empty result. For instance, if you select the option *First Accessed* in the Filter Date Range filter and then select the option *Not Accessed* in the Completion Status filter, these filters will negate each other and return no data.

Understanding Report Activity Dates

Report Activity Date filters determine the start and end dates for all activity included in the report results. These filter types are located under the **Activity Dates** tab in the report template window. There are two versions of the Report Activity Date filters: the *Activity Date Range* filter, and the *Activity Date As Of* filter.

Activity Date Range

The Activity Date Range filter allows you to select what time span the results include. For example, you can report on all activity that occurred during the previous month, or you can report on all activity that occurred between two specific dates.



The **Previous** option allows you to select an interval of time that is relative to today, or the date the template is accessed. The dates are dynamic and update each time the template is accessed either manually or from a schedule. This option is useful when you want to create recurring schedules that generate results with the most current data. This option is explained in detail below.

The **From/To** option allows you to select specific start and end dates. If a value is entered for both the start and end date, the dates are static and do not update if the template is accessed in the future. Typically this option is useful when you want a one-time snapshot of data. This option is explained in detail below.

Note: When the Previous option is selected, the dates that correspond to the 'Previous [n] [Units]' will display in the From/To option and will refresh accordingly. This provides a valuable aid to help you understand the nature of the dates you are selecting.

Previous Option

The intervals for the Previous option include Days, Weeks, Months and Years and each is bound by specific start and end dates, as well as times. You can also select the number of intervals to include, for instance '*3* Months' or '*2* Weeks'. Each interval has a maximum limit as defined below:

- Years – 99
- Months – 999
- Weeks – 999
- Days – 9999

The Previous option also provides a **To Date** setting that allows you to include all activity up to the current date and time, regardless of the interval chosen.

- If **To Date** is *unchecked*, the end date is the last day of the previous interval. For instance, if today is December 31, the 'Previous [n] Months' ends on November 30 and the 'Previous [n] Years' ends on December 31 of the prior year.
- If **To Date** is *checked*, the end date is always the date the report is run, up to and including the most recent database refresh.

The start and end dates for each interval are defined below.

- **Day intervals**
- Maximum number of intervals is 16.
- Starts at 00:00:00 or 12 midnight, ends at 11:59:59.
- **Example:** If today is any time on October 31, then the 'Previous 3 Days' starts on October 28 at 00:00:00 and ends on October 30 at 11:59:59.

> **Note:** For all intervals listed below, the start and end *times* are the same as those noted for Day intervals.

- **Week intervals**
- Maximum number of intervals is 16.
- Starts on Sunday, ends on Saturday.
- **Examples with To Date Unchecked**
  - If today is Sunday October 31, then the 'Previous 2 Weeks' starts on Sunday October 17 and ends on Saturday October 30.
  - If today is Wednesday November 3, then the 'Previous 2 Weeks' starts on Sunday October 17 and ends on Saturday October 30.
- **Example with To Date Checked**
  - If today is Wednesday November 3 then results for the 'Previous 2 Weeks' starts on Sunday October 17 and ends on Wednesday November 3.

- **Month intervals**
- Maximum number of intervals is 12.
- Starts on the first day of the month, ends on the last day of the month.
- **Examples with To Date Unchecked**
  - If today is October 31, then the ‘Previous 3 Months’ starts on July 01 and ends on September 30.
  - If today is November 3, then the ‘Previous 3 Months’ starts on August 01 and ends on October 31.
- **Example with To Date Checked**
  - If today is November 3 then the ‘Previous 3 Months’ starts on August 01 and ends on November 3.
- **Year intervals**
- Maximum number of intervals is 4.
- Starts on the first day of the year, ends on the last day of the year.
- **Examples with To Date Unchecked**
  - If today is October 31, 2010, then the ‘Previous 2 Years’ starts on January 1, 2008 and ends on December 31, 2009.
  - If today is any day in 2010, then the ‘Previous 3 Years’ starts on January 1, 2007 and ends on December 31, 2009.
- **Example with To Date Checked**
- If today is November 3, 2010 then the 'Previous 2 years' starts on January 1, 2008 and ends on November 3, 2010.

Note: For all settings that have an end date of today, the results are dependent on the last successful automatic database refresh.

From/To Option

The From/To option allows you to set specific dates.

When using the From/To option you must adhere to the following guidelines:

- The **To** date can be left blank. The **From** date cannot be left blank.
- If the **To** date is blank, the end date is always the date the report is run, up to and including the most recent database refresh.
- The **From** date is always the beginning of the day and starts at 00:00:00 or 12 midnight UTC. The **To** date is always the end of the day and ends at 11:59:59 UTC.
- All dates must be entered in the format YYYY-MM-DD. For instance, 2010-01-01.
- The **To** date must be later in time than the **From** date.

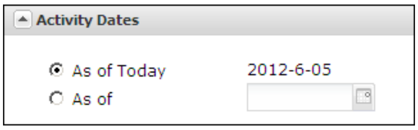
> Note: If you are modifying chart activity dates, there is a limit to the length of time that can be included in the Previous or From/To options. For more information, see ***Modify Chart Activity Dates*** on page 556.

Example

To generate a monthly, year-to-date report, schedule a monthly report that runs on the first of each month. Set the **From Date** to Jan 1 and leave **To Date** blank.

Activity Date As Of

The Activity Date As Of filter allows you to select the end date for all report activity.



Selecting **As of Today**, sets the end date to the current date the template is accessed either manually or from a schedule. This option uses a dynamic date that automatically updates each time the report runs. This is useful if you want to capture a one-time snapshot of the current report activity, or if you want to schedule the report to run on a recurring basis.

Selecting **As of** allows you to choose a specific date either in the past or the future. This option uses a static date that will not change, even for scheduled reports that run in the future. This is useful if you want to capture a one-time snapshot of report activity as of a past date, or if you want to create a one-time schedule to run the report in the future.

About Learner Activity and Activity Dates

In any report that includes the Activity Date Range Filter, learner activity for a specific asset is included in the results only if the learner launched the asset within the specified activity date range. Additionally, the data returned for certain fields is affected by the Activity Date Range.

Example 1: No activity

Tom completes Course A in May and does not re-launch the course any time after that.

In July, you run an activity report with activity dates of **June 1 to June 30.**

- No data for Course A for Tom will appear in the report since Tom did not access Course A during the specified activity date range.

First and Last Access Dates

In activity reports such as Asset Activity by User or Course Activity by Content, the data returned for the following fields reflects only activity that occurs during the selected Activity Date Range:

- First Access Date
- Last Access Date
- Times Accessed
- Actual Duration

Example 2: First and Last Access Dates are only included for accesses within the Activity Date Range

Tom accesses Course B for the first time on May 10th. He accesses it for the second time on June 15th.

In July, you run an activity report with an Activity Date Range of **June 1 to June 30**.

- Course B displays First Access and Last Access Dates of June 15
  - Tom accessed the course for the first and only time *within the specified activity date* range on June 15.

Times Accessed and Actual Duration

The Times Accessed and Actual Duration are also effected by the learner's activity within the specified activity date range.

Example 3: Accesses and Actual Duration are counted only for activity within the Activity Date Range

Bill accesses Course A accordingly:

- June - 1 access, 30 minutes duration
- July - No accesses
- Aug - 1 access, 15 minutes duration
- Sept - 2 accesses, 60 minutes duration

On September 30, you run a Q2 (June, July, and August) and a Year-To-Date report.

Report 1 – Selected Activity Dates: June 1 to August 31

- Number of Times Accessed = 2
- Actual Duration = 45 minutes

Report 2 – Selected Activity Dates: Jan 1 to Sept 30 (YTD)

- Number of Times Accessed = 4
- Actual Duration = 95 minutes

Completion Date, Completion Status and Scores

Completion Date, Completion Status and Scores are reported as of the last day of the Activity Date Range.

Example 4: Completion Date, Completion Status and Scores

Tom accesses Course A:

- Jan 3 - 1 access, score of 65
- Jan 10 - 1 access, score of 100, completed.

Bill accesses Course A:

- Jan 12 - 1 access, score of 77, need 80 or better to pass
- Feb 5 - 1 access, score of 88, completed

Report 1: Activity Date Range of Jan 1 to Jan 31 displays:

User	First Access	Last Access	Completion Status	Completion Date	High Score
Tom	1/03/14	1/10/14	Completed	1/10/14	100
Bill	1/12/14	1/12/14	In progress		

Report 2: Activity Date Range of Jan 1 to Feb 28 displays:

User	First Access	Last Access	Completion Status	Completion Date	High Score

Tom	1/03/14	1/10/14	Completed	1/10/14	100
Bill	1/12/14	2/05/14	Completed	2/5/14	88

Report 3: Activity Date Range Feb 1 to Feb 28:

User	First Access	Last Access	Completion Status	Completion Date	High Score
Bill	2/05/14	2/05/14	Completed	2/5/14	88

Since Tom's only access to the course was in January, no data will show in the report.

Completion Dates and Scores can be prior to the Activity Date Range

Since Completion Status, Completion Dates and Scores are reported as of the End Date, these values could be from a prior period.

George accessed a course:

- Jan 2 - 1 access, score of 99, completed
- Feb 15 - 1 access, no additional score

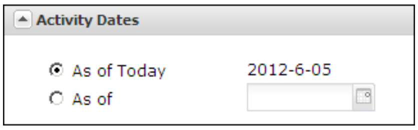
Report 4: Activity Date Range Feb 1 to Feb 28:

User	First Access	Last Access	Completion Status	Completion Date	High Score
George	2/15/14	2/15/14	Completed	1/22/14	90

Select Report Activity Dates

To modify the As of Today dates

1. Click the **Activity Dates** drop down.

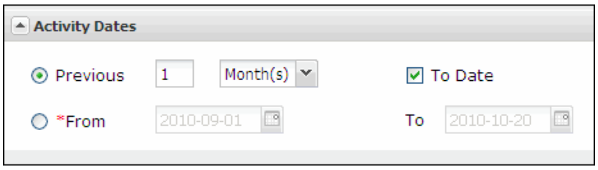


2. Select either the **As of Today**, or the **As of** option.

   If you select As of, you must select a date in the date field.

To modify the Activity Dates

1. Click the **Activity Dates** drop down.



2. Select either the **Previous** or **From/To** option.

   If you select the Previous option, enter a number and select the desired interval type.

   If you select the From/To option, select start and end dates in the date fields.

See ***Understanding Report Activity Dates*** on page 520 for a description of the above options.

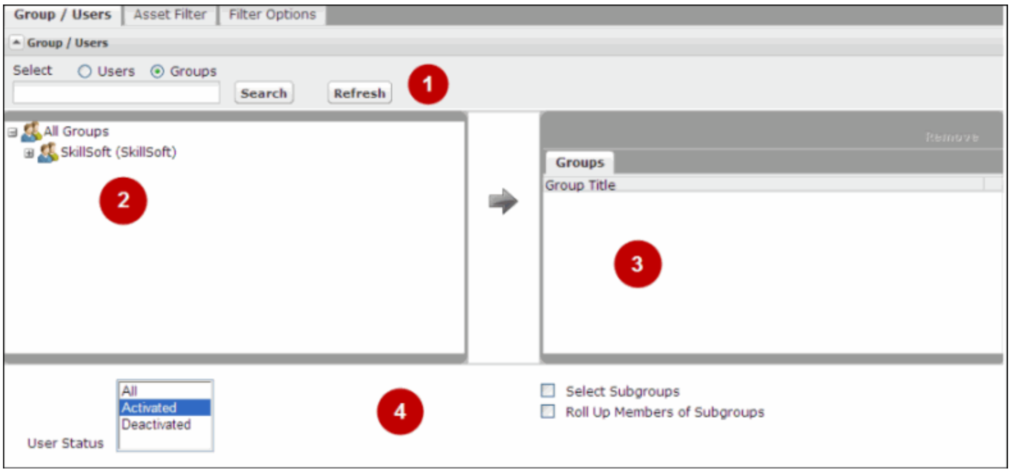
Select Groups and Users

The **Group / Users** filter allows you to select specific groups, subgroups, or users. When the report is run, the results will only include data for the groups or users you selected. You can choose to filter by either Groups or Users, but not by both at the same time.

Note: Visibility of groups and users within this filter is determined by the User/Group Filter Scoping option in the Skillport Administrator UI and your user privileges. See ***User and Admin Privileges*** on page 501 for more information.

To access the Group/Users filter

1. From the menu click **Templates**.
2. Select the desired template.
3. Click **Edit**. The Template window displays.
4. Click the **Group / Users** tab. The following screen displays:



The Group/Users filter includes the following sections:

1. **Search Tool** - Allows you to search for specific groups or users.
2. **Groups or Users list** - Displays the list of groups or users you have permission to view.
3. **Selected groups or users** - Displays the list of selected groups or users you want to include in your results.
4. **Additional Filters** - Displays a variety of filters based on the template chosen. In Books and Videos reports, the Subscription ID filter displays above the search tool.

   Note: In some templates, the Group or the User option may not be available. For instance, the Group Learning Plan Assignments template does not allow you to filter by user, since this is a group specific report.

Selecting Groups or Users

To search for specific users or groups

1. Select either the **Users** or **Groups** option.

2. Enter your search criteria in the text field.

   For **Users**, enter a login name, first name, or last name.

   For **Groups**, enter a group name or org code.

3. Click **Search**. The users or groups that match your criteria display.

   If no results were found, you are prompted to click **Refresh** to display the entire list.

To select users or groups

1. In the Groups or Users list (section 2 in the above graphic), select the desired **Users** or **Groups**. Use the CTRL or Shift keys to select multiple rows.

2. Click the **selection arrow,** or drag the selection to the right pane. The selected users or groups are added to the selected list (section 3 in the above graphic).

To remove users or groups from the selection

1. In the selected users or groups list, select the desired **Users** or **Groups**.

2. Click **Remove**.

Using Additional Filters

Depending on the Template type accessed, the following filters may be available on the Group/Users Filter tab. To select an option, choose from either a drop down or place a check in the corresponding check box.

- **Subscription ID** - In Books and Videos reports, this filter allows you to select users based on their current Subscription ID. Only the users assigned the currently selected ID will display in the User filter.
- **User Status** - Select users based on their current status of Activated or Deactivated. Select both options to include all users.
- **User Role** - Provides the ability to filter users by their current role. You can select one, or multiple, roles of either End User, Manager, Administrator, Company Administrator, or Super Administrator.
- **Seat Status** - Provides the ability to specify users' seat status. Select Any, Occupied, or Deleted.
- **Privilege** - Provides the ability to filter users based on their current privilege. You can select one, or multiple privileges. For a complete list see the User Privilege report in the Reports Definition document.
- **Only Show Assets Assigned Through Selected Group's Learning Plan** - Only includes activity for assets in a group's Learning Plan, and only for groups explicitly selected. Does not include activity for assignments inherited by a group's parent group.

The Select Subgroups and Rollup Members of Subgroups check boxes effect how your users and subgroups are displayed within the results.

- **Select Subgroups** - Include all subgroups of a selected group.
- **Rollup Members of Subgroups** - Include a subgroup's members and treat them as if they are members of the selected parent group.

These two check boxes can work independently or together, and there are four scenarios for displaying the data. The example below demonstrates the effects of checking and unchecking these options.

For this example, the groups and users are structured as follows:

Group A is the selected group. Group B and Group C are subgroups of Group A.

Group A

- User 1
- User 2
- **Group B**
  - User 3
  - User 4
- **Group C**
  - User 5

- User 6

When you run reports based on these scenarios, the results will include the following rows of information for each user:

If you select group A and leave both check boxes unchecked, only the users from Group A will be included.

- User 1 Group A
- User 2 Group A

If you select group A and check only the **Select Subgroups** check box, the users from the selected group and the subgroups will display as follows:

- User 1 Group A
- User 2 Group A
- User 3 Group B
- User 4 Group B
- User 5 Group C
- User 6 Group C

If you select group A and check only the **Rollup Members of Subgroups** check box, the users from the selected group and the subgroups will display, however the users will be listed as if they are all members of the parent group.

- User 1 Group A
- User 2 Group A
- User 3 Group A
- User 4 Group A
- User 5 Group A
- User 6 Group A

If you select group A and check **both** check boxes, the users from each group will display as if they are members of their subgroup and the selected parent group. Some users will be duplicated in the list.

- User 1 Group A
- User 2 Group A
- User 3 Group A
- User 4 Group A
- User 5 Group A
- User 6 Group A
- User 3 Group B
- User 4 Group B

- User 5   Group C
- User 6   Group C

Select Assets

The **Asset Filter** tab provides options for including or excluding assets, and selecting assets by type and sub-type. You can search for specific assets and you can filter by options such as Learning Program status, Books and Videos Collections, etc.

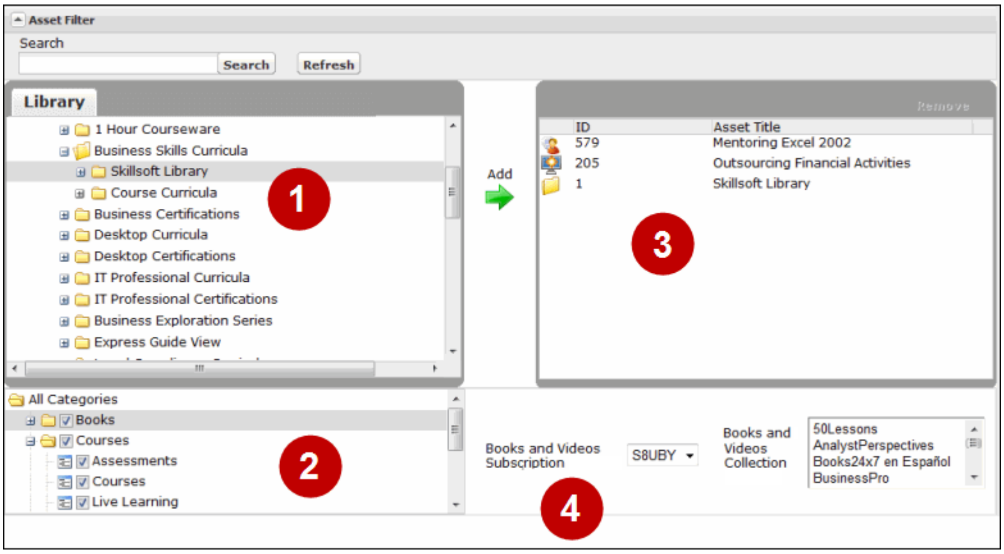
You can select a single asset, multiple assets, or an entire folder. If you select an entire folder of assets, all assets in the folder and its sub-folders will be included in the report results. For any templates that are saved with a folder selected in the asset filter, if the contents of the folder change at a later date then:

- Any assets removed from the folder will not be included in the report results.
- Any assets added to the folder will be included in the report results, if available.

Note: Assets that are added with a folder can also be added individually. However, data based on this asset will not be duplicated in the report results.

To access the Asset Filters

1. From the Reports menu, click **Templates**.
2. Select the desired template.
3. Click **Edit**. The Template window displays.
4. Click the **Asset Filter** tab.



The Asset Filter can include the following sections:

1. **Asset Selector** - Allows you to select specific assets. Content specific templates, such as Learning Program or KnowledgeCenters, will only display assets associated with that content type.

2. **Category/Sub-category Selector** - Allows you to select assets by category and sub-category. Referred to as type and sub-type in report results.

3. **Selected Assets** - Displays the selected list of assets you want to include in your results.

4. **Additional Filters** - Displays a variety of filters based on the selected template.

Note: The screen shot above is an example of filter types included on the Asset Filter tab. This is not a representation of an actual template. Not all asset filters are included in every template.

Selecting Assets

To search for specific assets

1. Enter your search criteria in the **Search** text field.

   Note: Use the % character for a wild card search. The * character is invalid in the Reporting asset search filter.

2. Click **Search**. If found, the assets matching your search criteria will display in the Asset Selector section (section 1 in the graphic above), replacing the assets displayed by default.

To select specific assets

1. From the **Asset Selector**, select the desired asset(s), or select an entire folder. The Add arrow enables.

2. Click the **Add Arrow,** or drag and drop the assets. The assets, or folder, are added to the Selected Assets list.

To select asset types or sub-types

1. In the **Category Selector** expand or collapse the list as desired.

2. Select one or more types, or sub-types.

To remove selected assets

1. In the **Selected Assets** list select the desired asset(s). The Remove button enables.

2. Click **Remove**.

Note: The Asset and the Category filters are not related and are applied to the results sequentially. For instance, it is possible to select a specific *Course* from the Asset filter, but a *Book* category from the Category filter. This will produce an empty result set.

Using Additional Filters

Depending on the Template type accessed, the following filters may be available on the Asset Filter tab. To select an option choose from either a drop down or a multi-selection list. These filters may be the only filters on the tab, or they may display below the Asset and Category Filters.

- **Learning Program Status** - Select All, Enrolled (but not started), Started, Completed, Declined, Pending, or Withdrawn
- **Live Learning Status** - Select one or more live learning statuses. Started, Pending Approval, Completed, Declined, Withdrawn, Enrolled but not Started.
- **Books and Videos Subscription Selector** - Select from one of the subscriptions available.
- **Books and Videos Collections Selector** - Select one or more collections (Books and Videos) the user is entitled to.
- **Evaluation** - Select one evaluation from the list. Changing the selection may modify the assets displayed in the Asset Selector list.

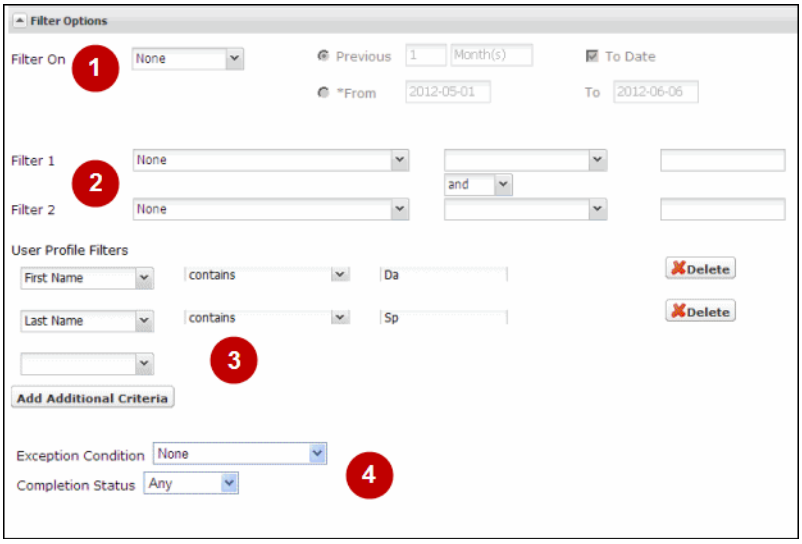
Apply Additional Filter Options

The Filter Options tab includes a variety of filters for customizing the data returned in results.

To access the additional filters

1. From the menu click **Templates**.
2. Select the desired template.
3. Click **Edit**. The Template window displays.
4. Click the **Filter Options** tab.

5. If necessary click the Filter Options drop down.



The Filter Options tab can include the following sections:

1. **Event Filter Options** - The Event Filter Options, labeled 'Filter On' in the above image, allow you to select one event and then select a date range for that specific event. See ***Apply Event Filter Options*** on page 537 for more information.

2. **Custom Filters** - The Custom filters are comparison filters that can be used together or individually. See ***Apply Custom Filters*** on page 536 for more information.

3. **User Profile Filters** - The User Profile filters allow you to filter data based on the values available in your organization's user profile settings. See Apply User Profile Filters for more information.

4. **Additional Filters** - A variety of filters can display in the additional filters section. These filters are typically asset or user related, depending on the type of template selected. See the Report Definitions document for a list of filters in each report.

Note: The screen shot above is an example of filter types included on the Filter Options tab. Not all filters are included in every template.

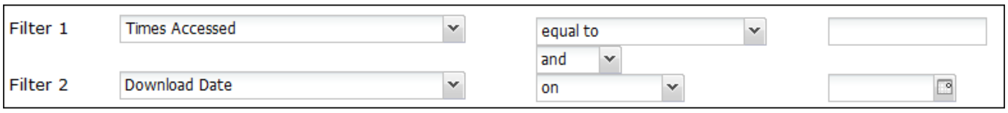
Apply Custom Filters

Filter 1 and Filter 2 Custom filters

The Filter 1 and Filter 2 controls allow you to select an option, enter a value, and use an operator to display only data that matches the specific criteria. You can use only one of the filters, or you can choose an option for Filter 1, and then further define the criteria by choosing 'and', or 'or' for the option selected in Filter 2.

Each filter consists of a drop down with available options, a drop down with applicable operators, and a field for entering the appropriate value. Both the operator and the value field will automatically change depending on the type of option chosen.

For example, in the screen shot below, the option selected for Filter 1 is numerical. The operator drop down includes choices such as 'equal to', 'not equal to', 'less than', etc. The value field is a text field for entering numbers. The option selected for Filter 2 is date based. The operator drop down includes the choices 'on', 'on or before', and 'on or after'. The value field includes a calendar picker for entering a date.



Note: For all fields that calculate a 'duration', such as Actual Duration or Average Duration per User, enter the value as a number of minutes. For example, 2:00 (2 hours) should be entered as 120.

The 'and' / 'or' option determines if you want the data returned to match both filter criteria, or the criteria from either filter.

When these filters are available, a minimum default list is included, but some templates also include report specific options. To see a list of options available for specific templates see Report Definitions.

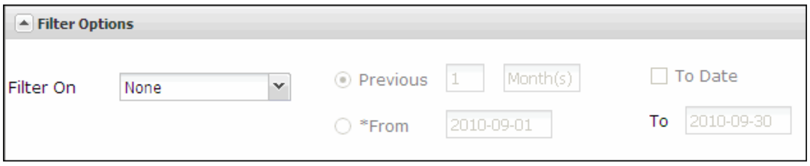
Warning: Although the Custom filters are very powerful and flexible they are not the preferred way to filter general cases such as getting data for a specific user or asset. The criteria in these filters are applied to the data after the query is sent to the database. If these are the only filters applied, it may take several minutes for the report to run. Using the Group / Users filter or the Asset filter is much faster since these filters are applied before the query is sent to the database.

To apply the Custom filters

1. From the Reports menu, click **Templates**.
2. Select the desired template.
3. Click **Edit**. The Template window displays.
4. Click the **Filter Options** tab.
5. If necessary, click the Filter Options drop down.
6. Select an option from the **Filter 1** drop down.
7. Select an **operator** from those available.
8. Enter a **value** in the value field.
9. Optionally, select 'and' or 'or' from the drop down and repeat the above steps for the Filter 2 fields.

Apply Event Filter Options

Event Filter Dates - The Event Filter Options allow you to filter report results by selecting one event and then selecting a date range for that specific event. For example, you can filter the data to only include assets that have a *Completion Date* within the past two weeks.



The **Filter On** drop down allows you to select an event such as Skillport Registration date, Last Login date, High Score, etc. The available events vary based on the template selected.

The **Previous** option allows you to select an interval of time that is relative to today, or the date the template is accessed.   The dates are dynamic and update each time the template is accessed either manually or from a schedule. This option is useful when you want to create recurring schedules that generate results with the most current data. This option is explained in detail below.

The **From/To** option allows you to select specific start and end dates. If a value is entered for both the start and end date, the dates are static and do not update if the template is accessed in the future. Typically this option is useful when you want a one-time snapshot of data. This option is explained in detail below.

Note: When the Previous option is selected, the dates that correspond to the 'Previous [n] [Units]' will display in the From/To option and will refresh accordingly. This provides a valuable aid to help you understand the nature of the dates you are selecting.

Previous Option

The intervals for the Previous option include Days, Weeks, Months and Years and each is bound by specific start and end dates, as well as times. You can also select the number of intervals to include, for instance '*3* Months' or '*2* Weeks'. Each interval has a maximum limit as defined below:

- Years – 99
- Months – 999
- Weeks – 999
- Days – 9999

The Previous option also provides a **To Date** setting that allows you to include all activity up to the current date and time, regardless of the interval chosen.

- If **To Date** is *unchecked*, the end date is the last day of the previous interval. For instance, if today is December 31, the ‘Previous [n] Months’ ends on November 30 and the ‘Previous [n] Years’ ends on December 31 of the prior year.
- If **To Date** is *checked*, the end date is always the date the report is run, up to and including the most recent database refresh.

The start and end dates for each interval are defined below.

- **Day intervals**
- Maximum number of intervals is 16.
- Starts at 00:00:00 or 12 midnight, ends at 11:59:59.
- **Example:** If today is any time on October 31, then the 'Previous 3 Days' starts on October 28 at 00:00:00 and ends on October 30 at 11:59:59.

Note: For all intervals listed below, the start and end *times* are the same as those noted for Day intervals.

- **Week intervals**
- Maximum number of intervals is 16.
- Starts on Sunday, ends on Saturday.
- **Examples with To Date Unchecked**
  - If today is Sunday October 31, then the ‘Previous 2 Weeks’ starts on Sunday October 17 and ends on Saturday October 30.
  - If today is Wednesday November 3, then the 'Previous 2 Weeks' starts on Sunday October 17 and ends on Saturday October 30.
- **Example with To Date Checked**
  - If today is Wednesday November 3 then results for the 'Previous 2 Weeks' starts on Sunday October 17 and ends on Wednesday November 3.

- **Month intervals**
- Maximum number of intervals is 12.
- Starts on the first day of the month, ends on the last day of the month.
- **Examples with To Date Unchecked**
  - If today is October 31, then the 'Previous 3 Months' starts on July 01 and ends on September 30.
  - If today is November 3, then the 'Previous 3 Months' starts on August 01 and ends on October 31.
- **Example with To Date Checked**
  - If today is November 3 then the 'Previous 3 Months' starts on August 01 and ends on November 3.
- **Year intervals**
- Maximum number of intervals is 4.
- Starts on the first day of the year, ends on the last day of the year.
- **Examples with To Date Unchecked**
  - If today is October 31, 2010, then the 'Previous 2 Years' starts on January 1, 2008 and ends on December 31, 2009.
  - If today is any day in 2010, then the 'Previous 3 Years' starts on January 1, 2007 and ends on December 31, 2009.
- **Example with To Date Checked**
- If today is November 3, 2010 then the 'Previous 2 years' starts on January 1, 2008 and ends on November 3, 2010.

Note: For all settings that have an end date of today, the results are dependent on the last successful automatic database refresh.

From/To Option

The From/To option allows you to set specific dates.

When using the From/To option you must adhere to the following guidelines:

- The **To** date can be left blank. The **From** date cannot be left blank.
- If the **To** date is blank, the end date is always the date the report is run, up to and including the most recent database refresh.
- The **From** date is always the beginning of the day and starts at 00:00:00 or 12 midnight UTC. The **To** date is always the end of the day and ends at 11:59:59 UTC.
- All dates must be entered in the format YYYY-MM-DD. For instance, 2010-01-01.
- The **To** date must be later in time than the **From** date.

Note: If you are modifying chart activity dates, there is a limit to the length of time that can be included in the Previous or From/To options. For more information, see ***Modify Chart Activity Dates*** on page 556.

To apply Event Filter options

1. Click the **Filter Options** tab.
2. Select an event from the **Filter On** drop-down.

   Note: The available events will vary depending on the template selected. For a description of each event see the Report Definitions and refer to the corresponding report. Locate the event in the Display Options section.

3. Select either the **Previous** or **From/To** option.
4. To modify the dates, follow the guidelines above based on the option selected.

Understanding User Profile Filters

User Profile filters allow you to filter data based on the values available in your organization's User Profile Fields.

In order for a filter to be available in Reporting, the View Only option must be selected for that specific filter in the ***Configure User Profile Settings*** (on page 491) page. These settings are disabled for reporting by default.

Note: Changes made in the Configure User Profile page will not take effect until after a database refresh (ETL). It is Skillsoft's commitment to ensure that customer reporting data is updated within 24 hours. In general, database refreshes run several times a day.

In Reporting, User Profile filters appear on the Filter Options tab in report templates that include user information. Only fields that contain data will display in the list and you can add as many fields to the report as are available. When selected, each field provides options for defining conditions and criteria with which to filter the data.

Localized User Profile Fields that do not include an English version will display the **field ID** in the filter and report results. If English is available, the English version will always display by default.

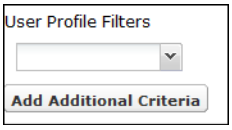
User Profile Fields configured to appear in reporting will also be added to the Display Options tab under User Fields. However, if the field is not a required or default display option, using it to filter data will not automatically set the option to display as a column header in the report results. If you want the field to display as a column header, you must select it in the Display Options tab.

Apply User Profile Filters

To apply a User Profile Filter

1. From the Skillport Reports menu, click **Templates**.
2. Select the desired template.
3. Click **Edit**. The Template page displays.
4. Click the **Filter Options** tab.

5. Under User Profile Filters, click **Add Additional Criteria** to display a drop down.



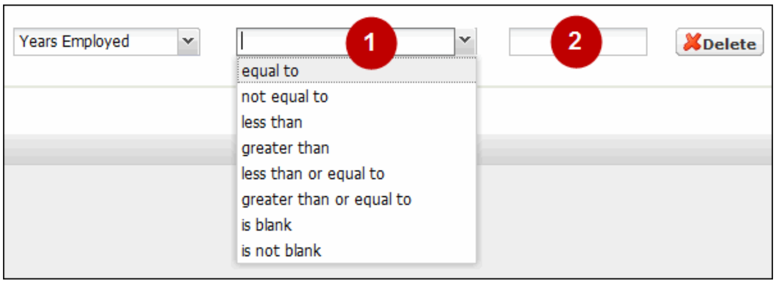
6. Click the **Filter** drop down and select the desired filter.

   Options for selecting the filter conditions, the filter criteria, and for deleting the filter will display.

   Condition and Criteria Options

The data type of the selected filter determines which of the following condition and criteria fields display.

Note: The data type for each custom user profile field is defined when you Create a Custom Field on the Configuration > User Profile page.



Integer

1. **Conditional operators** include:
   - equal to
   - not equal to
   - less than
   - greater than
   - less than or equal to
   - greater than or equal to
   - is blank
   - is not blank
2. **Criteria** option displays as a text box and accepts numbers only.

Date Field

1. **Conditional operators** include:
   - on
   - on or before
   - on or after
   - is blank
   - is not blank
2. **Criteria** option displays a calendar widget. Date must be in the format YYYY-MM-DD.

Boolean

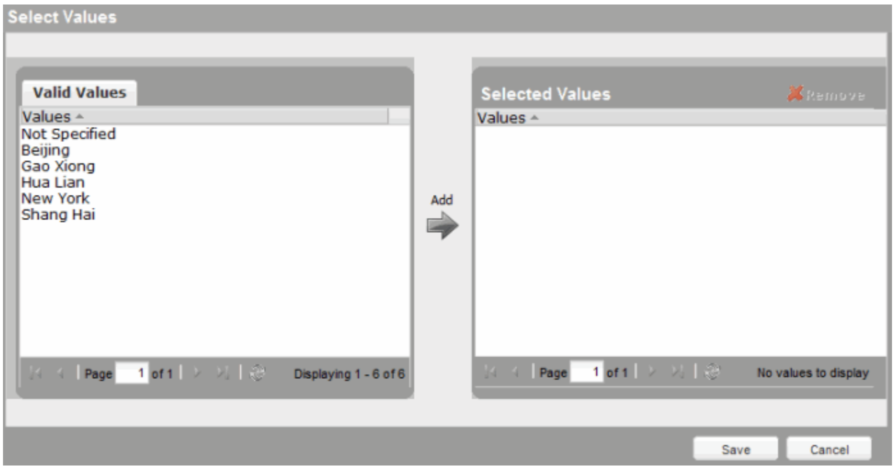
1. **Conditional operators** include:
   - equals
   - is blank
   - is not blank
2. **Criteria** option displays a drop down with a Yes or No value.

Text

1. **Conditional operators** include:
   - matches
   - does not match
   - contains
   - is blank
   - is not blank
2. **Criteria** option displays as a text box that accepts alphanumeric characters.

Select List

1. **Conditional operators** include:
   - does not match any of
   - matches any of
   - matches all of
2. **Criteria** option displays a **Select** link. When clicked, the Select Values dialog displays.



The Valid Values included in the list are captured from actual data added to a user's profile rather than the definitions in the User Profile Fields. The list is sorted alphabetically and the maximum number of values available is 200. Select **Not Specified** to filter on users with a blank value in this field.

To filter the data based on these criteria

1. Select one or more values from the **Valid Values** list.
2. Click **Add**, or drag and drop the item into the Values list.
3. Click **Save**.

The values will display in the report template.

To edit the list, click **Select** and add or remove values.

1. Complete all fields as desired.
2. Add additional filters if desired.

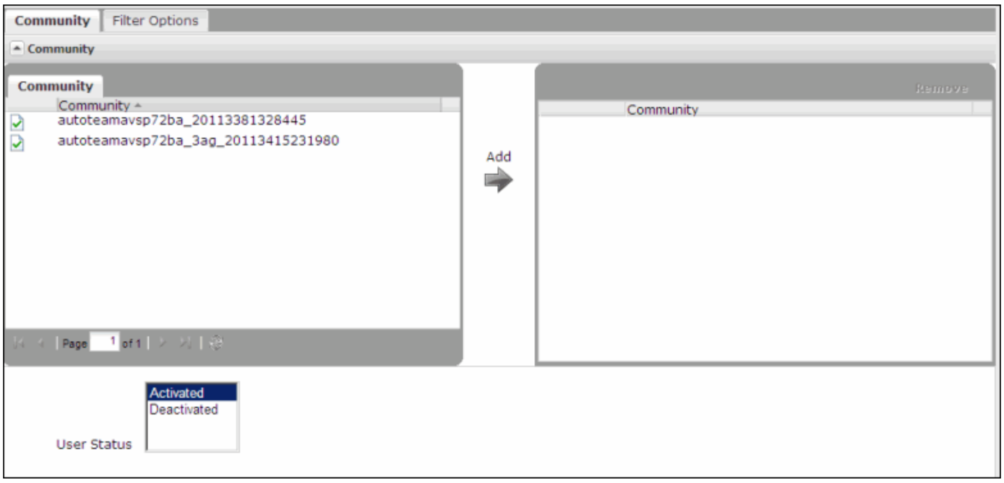
    Note: If you want the field to display as a column header, you must select it in the Display Options tab.

User Profile filters are added to the reporting query as an ‘AND’ parameter. For example, if two User Profile filters are added, the results will only return users who meet the criteria of *both* filters.

Note: Not all reports include the User Profile Filters.

Select inGenius Communities

The Community filter is available for inGenius report templates only. This filter allows you to filter data by one, several, or all communities in your organization. Your Skillport privileges will effect the results returned in your reports. Community Administrators can only see results for their specific communities. Company and Super Administrators can see results for all inGenius communities in the list.



To filter by Community

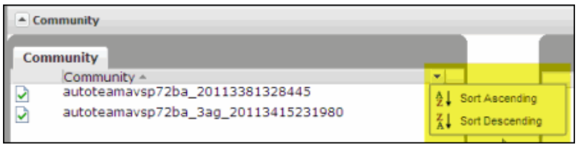
1. From the Templates window select any **inGenius** report type.
2. Click **Edit**.

3. Select the **Community** tab.

4. Select one or more communities from the list.

5. Click the **Add** arrow. The selected communities will display in the right pane.

You can sort either list by clicking the drop-down to the right of the pane.



To remove a selected Community

1. In the right pane select one or more **Communities**.

2. Click **Remove**.

Note: The Community filter also includes the User Status filter.

Select Display Options

Display Options allow you to control two aspects of report data:

1. How the data displays within the rows. These options are grouped together at the top of the Display Options tab.

2. What column headers, or fields of data, are included in the output. Column header check boxes are grouped together in the lower portion of the Display Options tab.

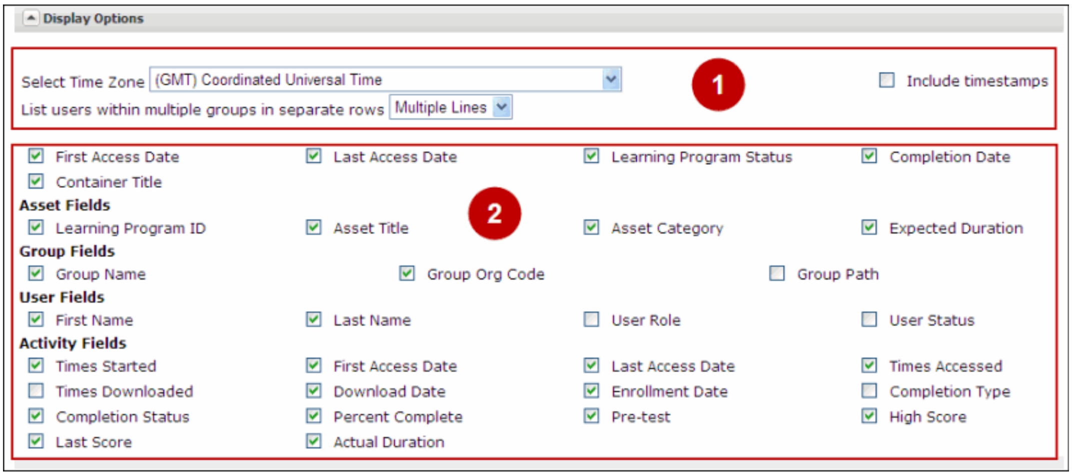
To access display options

1. From the menu click **Templates**.

2. Select the desired template.

3. Click **Edit**. The Template window displays.

4. Expand the **Display Options** tab.



Displaying Data

Several options allow you to control how the data within the rows and columns is displayed. Not all options are available in each template. The following list explains the affect of applying these options.

- **Select Time Zone** - Although activity is always recorded in UTC time, choosing Select Time Zone allows you to *display* the times in your local time zone. This does not affect the actual UTC time of the activity.
- **Include timestamp** - Appends hours, minutes and seconds to any date strings displayed within the report. Format is *YYYY-MM-DD hh:mm:ss*
- **List Users within multiple groups in separate rows** - Used to determine the display of records for users that are in multiple groups. If *multiple* is selected, a record will display for every group of which the user is a member. If *single* is selected, only one record for the user will display and group related fields will display a value of 'multiple'. This option is only applicable to reports that are sorted by user or asset and user. This option is not applicable for reports that are sorted by group.
- **Include Empty Subgroups** - When checked, empty subgroups will display in the results.
- **Include Users with no Approval Manager** - When checked, users that don't have an Approval Manager assigned will display in the results.
- **Show Assets with no Activity** - When checked, assets with no activity display in the results.

To select display options

1. At the top of the **Display Options** tab locate the check boxes.
2. Check or uncheck the desired options.

Column Headers

Column Headers determine what fields will be included in the report results. For each template, several column headers are selected by default, but can be selected and unselected as desired. For convenience, many of the column headers are grouped by category according to the type of data they display.

To select column headers

1. At the bottom of the **Display Options** tab locate the Column check boxes.
2. Check or uncheck the desired options.

When the report is run, the results will contain a column for each option selected.

Note: Each template contains at least one column header that is required. However, these options do not display in the user interface since unchecking them would cause an error when running the report. See Report Definitions for a list of all column headers and display options included in each template.

Edit a Personal Template

You can edit a Personal template to modify the filters and display options.

To edit a Personal template

1. From the menu click **Templates**.
2. Click the **Personal** tab.
3. Select the desired template.
4. Click **Edit**. The Template window opens.
5. Modify the filters and display options as desired.
6. Click **Save**.

   Optionally, you can copy the Personal template by clicking **Save As** and renaming the template.

Delete a Personal Template

Personal templates can be deleted, however you cannot delete a default template.

To delete a Personal template

1. From the menu click **Templates**.
2. Click the **Personal** tab.
3. Select the desired template.
4. Click **Delete**.

   If a schedule is associated with this template, a message will display asking you to confirm whether or not you want to delete the template *and* its associated schedule. You must click **Yes** and delete the schedule in order to delete the personal template.

Both the personal template and the associated schedule will be deleted.

Sharing Personal Templates

Understanding Shared Templates

Personal Templates can be shared so that other users in your organization can use them to create schedules, preview reports, and save results. The following information explains important concepts about sharing templates.

Sharing a Template

- Only personal templates can be shared.
- Once shared, the template will display in both the Personal tab for the template owner, and the Shared tab for all users.
- Shared templates are only visible by other users in the same domain.
- A 'shared' icon appears next to the template in the Personal tab, and in the Shared tab. In the Shared tab, only templates belonging to the current user display the shared icon.
- The Shared tab includes a column with the user name of the template owner.
- An 'Owner' field with the template owner's user name will be added to the Template Properties panel in the Edit Template page, and to the Template Parameters table in the report output.
- For template owners, all operations that are available in the Personal tab will also be available in the Shared tab.
- If an administrator shares a template and their account is subsequently deactivated or deleted, the template will still appear in the Share tab for all users. Note that the owner name for a deleted account is changed from userID to _userID_###. Any user with administrator privileges can Preview, Edit or Schedule these Templates. A company administrator can also delete or unshare these templates.

See Share a Personal Template for more information.

Editing a Shared Template

- Template owners, and Super and Company Administrators can view, edit, save and delete all shared templates from the Shared Template tab.
- Only the template owner, and super or company administrators can modify a shared template, however other users can click the Save As button in the template edit window to create a copy of the template in their Personal tab.
- When a Super or Company Administrators saves a modified template owned by a different user, a message will appear asking whether he/she wants to take over the ownership of that template.
  - If yes is selected, the template owner will be changed to the current user, and the template will appear on their Personal tab.
  - If no is selected, no changes will be saved to the template.

- Once a shared template is saved as a personal template, any subsequent changes made to the shared template will not affect the personal template.

See Edit a Shared Template for more information.

Deleting and Unsharing a Shared Template

- Shared templates can only be deleted, or unshared, by the template owner, super administrators, and company administrators.
- When an owner deletes a shared template from either the Personal or Shared tab, a warning will appear asking the user for confirmation. Selecting yes will unshare, and delete, the template.
- If an owner deletes a shared template which they have scheduled, a warning will appear that states the schedule will also be deleted, and asks the user for confirmation.
- If an owner deletes, or unshares, a shared template that other users have scheduled, the other users receive a copy of the shared template in their Personal tab, and their schedules will be automatically reconfigured to utilize this template. Effectively, this means that other users' schedules will be unaffected when a shared template is deleted, or unshared.
- Dashboard charts based on a Shared Template will revert back to their Default Templates.

See Delete a Shared Template, or Unshare a Template for more information.

Disabling Shared Templates

Shared Templates can be enabled or disabled in the **Skillport > Admin > Configurations > Report Configurations** page. Disabling Shared Templates will remove all references to the feature from the User Interface, including the Shared Templates tab and the Share/Unshare buttons. If Shared Templates already exist and the functionality is subsequently disabled, the delete and unshare template rules explained above will apply. Only users with Super or Company Administrator privileges can enable/disable Shared Templates.

Share a Personal Template

Before sharing a template, see Understanding Shared Templates for important information.

To share a Personal template

1. From the menu, click **Templates** and select the **Personal** tab.
2. Select the desired template.
3. Click **Share**.
4. The template appears in the Shared tab and displays the share icon, and the owner's name.

Note: The share icon also appears next to the template in the Personal tab.

Edit a Shared Template

Before editing a shared template, see Understanding Shared Templates for important information.

Note: Only a template owner, super administrator, or company administrator can edit a shared template.

To edit a Shared Template

1. From the menu, click **Templates** and select either the **Personal** tab, or the **Shared** tab.
2. Select the desired template.
3. Click **Edit**.
4. Make the desired changes and click **Save**.

    Note: If you are a super or company administrator, but not the owner of the template, a message will appear asking if you want to take over ownership of the template. If you select No, you will not be allowed to save the template changes.

Delete a Shared Template

Before deleting a shared template, see Understanding Shared Templates for important information.

Note: Only a template owner, super administrator, or company administrator can delete a shared template.

To delete a shared template

1. From the menu, click **Templates** and select either the **Personal** tab, or the **Shared** tab.
2. Select the desired template.
3. Click **Delete**.
4. In the confirmation message that appears, click **Yes**.

The template will be removed from both the Shared tab, and the Personal tab.

Unshare a Template

Before unsharing a template, see Understanding Shared Templates for important information.

Note: Only a template owner, super administrator, or company administrator can unshare a template.

To unshare a template

1. From the menu, click **Templates** and select either the **Personal** tab, or the **Shared** tab.
2. Select the desired template.
3. Click **Unshare**.
4. In the confirmation message that appears, click **Yes**.

The template will be removed from the Shared tab.

Managing Charts

Understanding Charts

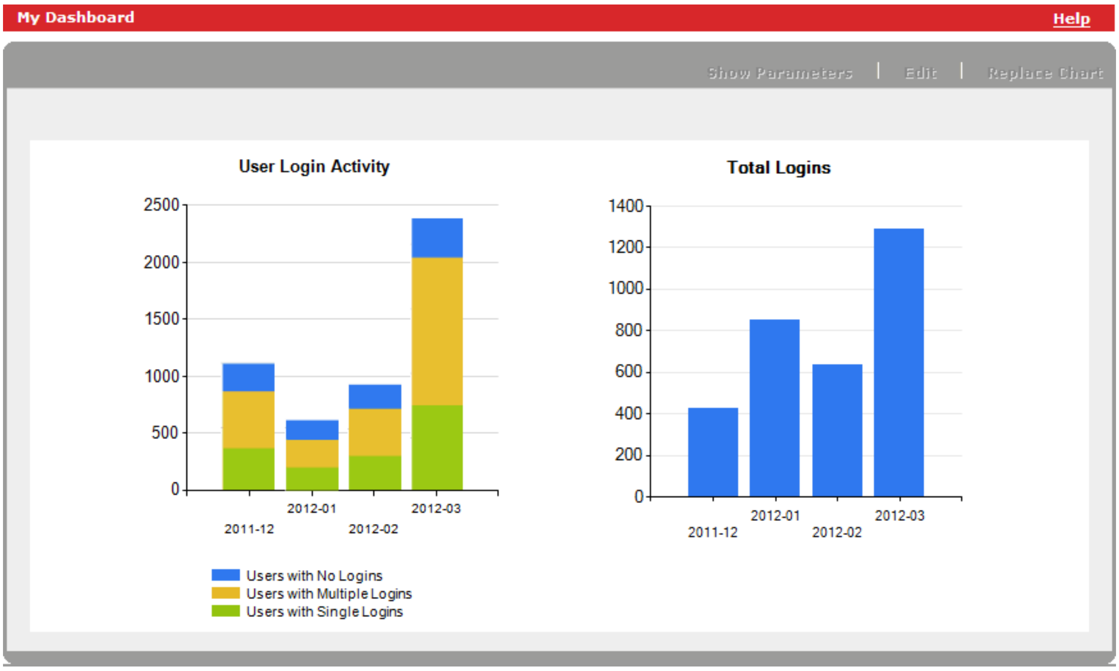
The **My Dashboard** window displays reports in chart form. There are several default charts included. The Dashboard can display two charts simultaneously, and you can replace the default charts with any existing chart template.

Personal chart templates can be created from the default templates, and you can share the personal charts with other users in your organization.

In the Templates tab, an icon indicates which charts are currently displayed on the dashboard.

Each time My Dashboard is accessed, the charts auto-refresh to display the latest data available based on the most recent database refresh which occurs automatically.

Note: It is Skillsoft's commitment to ensure that customer reporting data is updated within 24 hours. In general, database refreshes (ETL's) run several times a day.



Stacked Bar Charts, such as the User Login Activity chart shown above, include a key for each activity reported on in the results. You can also hover over the chart results to see the exact number.

In the My Dashboard window you can:

- Click Show Parameters to see the parameters for each chart on the dashboard.
- **Edit** a chart to create a personal chart template.
- Replace a chart with a default, personal or shared chart template.

Show Chart Parameters

In the My Dashboard window, you can view the parameters used to create the template for each of the charts displayed.

To view chart parameters

1. From the My Dashboard window, click a **chart** to select it.

2. Click **Show Parameters**. The Chart Parameters window appears.

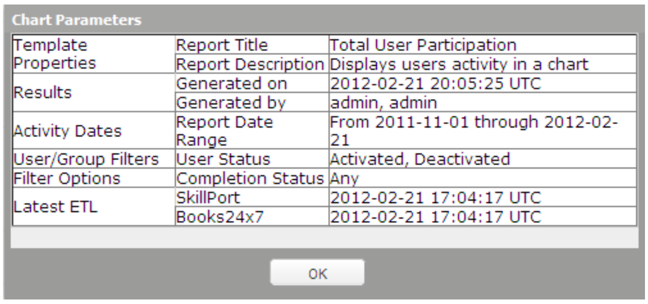


Chart Parameters

Template Properties	Report Title	Total User Participation
	Report Description	Displays users activity in a chart
Results	Generated on	2012-02-21 20:05:25 UTC
	Generated by	admin, admin
Activity Dates	Report Date Range	From 2011-11-01 through 2012-02-21
User/Group Filters	User Status	Activated, Deactivated
Filter Options	Completion Status	Any
Latest ETL	SkillPort	2012-02-21 17:04:17 UTC
	Books24x7	2012-02-21 17:04:17 UTC

OK

3. Click **OK** to close the window.

The Chart Parameters window is a read only dialog that includes the following information:

- **Template Properties**
  - Report Title - displays the title of the chart template.
  - Report Description - displays the description of the chart template.
  - Template Owner field may display if the chart template is shared.
- **Results**
  - Generated on - displays the date and time the report was run.
  - Generated by - displays the user that ran the report.
- **Activity Dates**
  - Report Date Range - displays the dates included in the results.
- **Filters**
  - Displays the filters applied to the current chart template. Not all filters are included in all templates.
- **Latest ETL**
  - Skillport - displays the most recent date and time that the data in the Skillport database was refreshed.
  - Books24x7 - displays the most recent date and time that the data in the Books24x7 database was refreshed.

Note: It is Skillsoft's commitment to ensure that customer reporting data is updated within 24 hours. In general, database refreshes (ETL's) run several times a day.

Create a Personal Chart Template

You can edit a chart template in order to create a personal chart. Charts displayed on the My Dashboard window can be edited directly from the dashboard. Other chart templates are accessed from the Templates tab. Default chart templates cannot be modified. To save changes you must use the Save As option.

Editing a chart template is similar to editing templates for all reports, with a few minor differences:

- The Activity Dates filter has an additional Display Units control.
- When you save a modified Personal chart template that is currently displayed on the Dashboard, the new chart template will replace the dashboard template. Selecting Save As does not replace the current chart. If you modify a chart from the templates tab that is not currently displayed on the dashboard, you must manually add this chart to the dashboard, if desired.

To create a personal chart template

1. From the menu click **My Dashboard**.
2. Click the desired **chart** to select it.
3. Click **Edit**, or double click the chart.

   Optionally, you can select a chart from a templates tab, and click **Edit**. The Templates window displays the Edit Chart template.
4. If available, click the following tabs to modify the associated filters:
   - Activity Dates - specifies what period in time the report should include.
   - Group / Users - returns data only for the selected groups or users.
   - Asset Filter - returns data only for the selected asset types.
   - Filter Options - a variety of filters for selecting criteria such as assignment and access dates.
5. Optionally, you can **Preview** the chart before saving the template to determine if it meets your needs.
6. To save the template, click **Save As**. The Save dialog displays.
7. Enter a **Name** for the personal template. Name field is mandatory and cannot contain more than 120 characters. The following characters are not allowed: \ / : * ? " < > | ; {}
8. Enter a **Description** of the template, if desired. Maximum character limit is 512.
9. Click **OK**. The new template will be saved to the Personal tab and a message will prompt you to create a schedule for this template.

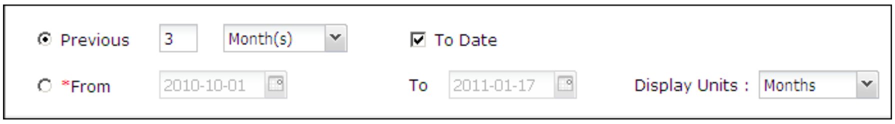
10. Click **Yes** to create a schedule or **No** to display the Personal template tab.

Optionally, you can save the results from the Edit Template window.

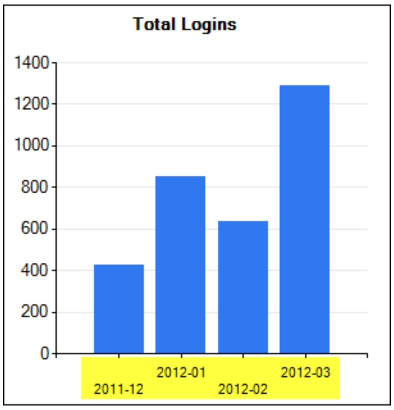
Note: The Preview window allows you to edit or save the template, and to save the template results.

Modify Chart Activity Dates

Functionality of the chart activity dates is similar to the activity dates in report templates, except for the addition of the *Display Units* control. This control determines the type of units used to display data on the chart. It also affects the length of time that can be set in the Previous and From/To dates.



The activity dates and the display units work together to produce the chart output. The Previous and From/To options determine the start and end dates for the data returned. The Display Units determine the type of data that displays on a chart, such as days or weeks, as highlighted in the image below.



There are limitations on the maximum number of units that can be displayed for each unit type. This effects the length of time that can be included in the chart output. The maximum values for each display unit are:

- 16 days
- 16 weeks
- 12 months
- 12 quarters
- 4 years

The time interval in the Previous option does not have to match the time interval selected in the display units. In other words, it is acceptable to select 'Weeks' for the Previous time interval and 'Days' for the Display Units, or any other combination. However, the time frame selected in the Previous option, or the dates entered into the From/To options, cannot exceed a length of time that would cause the display units to exceed these maximum values.

For instance, in the example pictured below, a time frame of 3 weeks exceeds 16 days for display units. To correct the error, you can change the number of weeks to 2 (which would result in only 14 days of data), or you can change the Previous option to 16 Day(s).

When you click the Preview, Save, or Save Result button, if your dates have exceeded the maximum display units, a message displays with information about the acceptable values.

To modify chart activity dates

1. In the chart template window locate the **Activity Dates** controls.
2. Select either the **Previous** or **From/To** option.

> **Note**: Use the Previous option to ensure the data is continually updated each time you access the My Dashboard tab. For more information on how to use the Previous and From/To date options see the section ***Select Date Ranges*** on page 520.

3. Select a **Display Unit**.

The effect that Display Units have on the chart output is defined below:

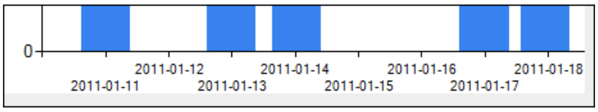
- Days

Previous Option

- To date checked - displays daily intervals through end of day today.
- To date unchecked - displays daily intervals through end of day yesterday.

From/To Option

- Displays daily intervals for all days in the date range.



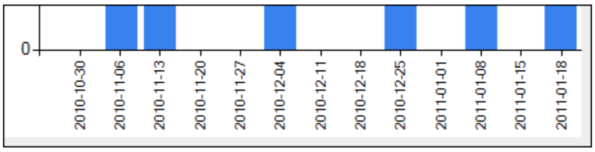
- Weeks

Previous Option

- To date checked - displays weekly intervals through the end of the last complete Saturday up to and including today.
- To date unchecked - displays weekly intervals through the end of the the range. Includes week to date if the date range does not end on a Saturday.

From/To Option

- Displays weekly intervals from Sunday to Saturday, starting with the first Sunday on or before the start date. Includes week to date if the end date is not a Saturday.



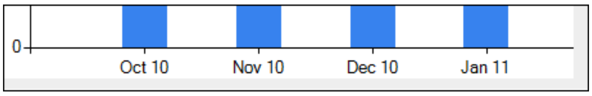
- Months

Previous Option

- To date checked - Monthly intervals through the end of the last complete month up to and including today.
- To date unchecked - Monthly intervals through the end of the date range. Includes month to date if the date range is not the last day of the month.

From/To Option

- Monthly for all months in the selected range, starting with the first day of the month that contains the start date. Includes month to date if the end date is not the last day of the month.



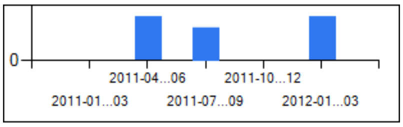
- Quarters

Previous Option

- To date checked - displays quarterly intervals through the end of the last complete quarter up to and including today.
- To date unchecked - displays quarterly intervals through the end of the date range. Includes quarter to date if the date range is not the last day of the quarter.

From/To Option

- Displays quarterly intervals starting with the first day of the quarter that contains the start date. Includes quarter to date if the end date is not the last day of a quarter. Quarters are calendar based - ie: Jan-Mar, Apr-Jun, Jul-Sep, Oct-Dec.



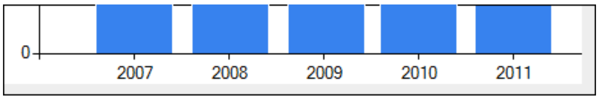
- Years

Previous Option

- To date checked - displays yearly intervals through the end of the last complete year up to and including today.
- To date unchecked - displays yearly intervals through the end of the date range. Includes year to date if the date range is not the last day of the year.

From/To Option

- Displays calendar year periods starting with the first day of the year that contains the start date. Includes year to date if the end date is not the last day of a year.



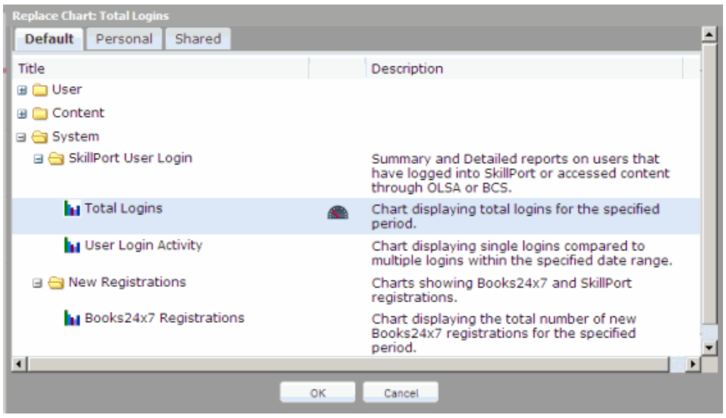
Replace a Chart

Charts on the My Dashboard window can be replaced with any existing chart template. You can use a default chart, a personal chart, or a shared chart. You can also use the same template for both dashboard charts, if desired.

To replace a chart on the My Dashboard window

1. From the My Dashboard window, select the desired chart.

2. Click **Replace Chart**. The Replace Chart dialog displays with the currently selected chart highlighted.



3. Select the desired template tab.

4. Select the desired chart.

5. Click **OK**.

*C*HAPTER 7
Support

In This Chapter

Client Community

The Skillsoft Client Community is an online resource center designed to assist you with your company's strategic elearning program. It is Skillsoft's goal to provide you with the tools you need to successfully implement and sustain an elearning program within your company.

The Skillsoft Client Community contains hundreds of ideas and tools for marketing an elearning program. Additionally, the Client Community has resources for industry news, company news, technical specifications, competency mapping, and more.

The Client Community is available to all Skillsoft customers, and registration is required to enter the site. You can access the site at ***http://community.skillsoft.com/***, or by clicking **Support > Client Community** on the top navigation bar in Skillport Administrator.

To obtain login credentials, contact your Skillsoft representative.

Diagnostics

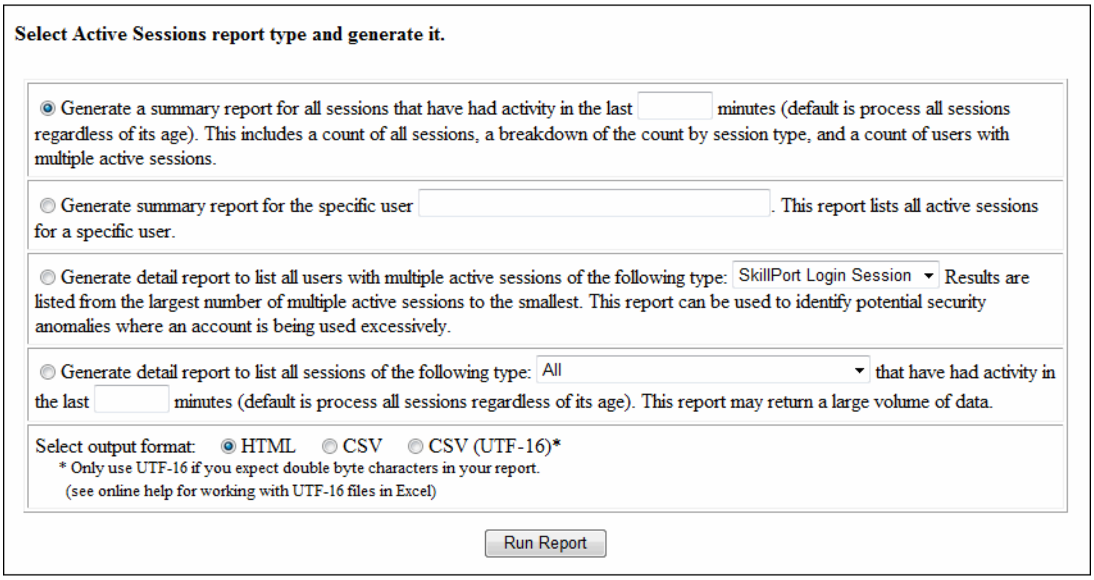
Run Active Sessions Report

There are several diagnostic reports you can run to generate active session data. You can also output the report results in several formats.

To run the active sessions report

1. Click **Support > Diagnostics > Run Active Sessions Report** on the navigation bar.
2. Click **Active Sessions Report**.

   The Active Sessions page displays in a new browser window.



3. For a summary report that includes all sessions that had activity in a specific time frame:

   a. Click **Generate a summary report for all session that have had activity in the last {number} minutes**.

   b. If desired, enter the number of minutes in the **{number}** text box. For example, for a report of all sessions with activity in the last hour, enter **60**.

      If you do not enter a value, a report is generated for all sessions by default.

4. For a summary report only for a specific user:

   a. Click **Generate summary report for the specific user**.

   b. In the text box, enter the user ID.

5. For a detail report listing all users with multiple active sessions:

   a. Click **Generate detail report to list all users with multiple active sessions of the following type**.

   b. Select the session type from the drop-down list.

6. For a detail report listing all sessions of a specific type in a specific time frame:

a. Click **Generate detail report to list all sessions of the following type**.

b. Select the session type from the drop-down list.

c. If desired, enter the number of minutes in the text box. For example, for all sessions with activity in the past hour, enter **60**.

If you do not enter a value, a report is generated for all sessions by default.

7. In **Select output format**, select how you want the report to be formatted. Valid values are **HTML**, **CSV**, and **CSV (UTF-16)**. The default value is **HTML**.

8. Click **Run Report**.

View Active Sessions Report

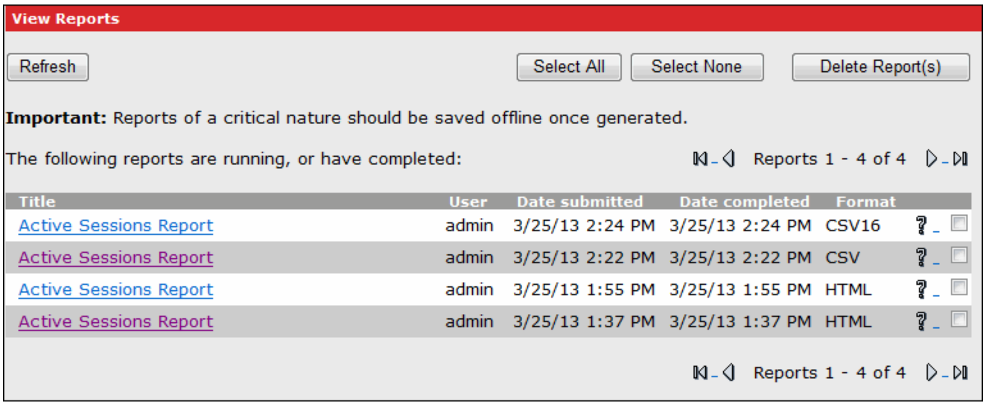
Use the View Reports page to view active sessions reports, review report details, and delete reports.

Note: Ensure you save critical reports offline after you generate them.

To view the active sessions report

1. Click **Support > Diagnostics > View Active Sessions Report** on the navigation bar.

   The View Reports page displays.



2. Click the title of the report you want to view.

   Depending on the selected output format, the report displays either in a new browser window or in a Microsoft Excel spreadsheet.

3. To view information about a report:

   a. Click the question mark in the corresponding row.

   The Report Details window displays the report title, user name of the person who ran the report, report status, date submitted, date completed, and execution time.

   b. In the Report Details window, review the report information.

   c. To view the report, click **View Report**.

   d. To close the Report Details window, click **Close**.

4. To delete selected reports:

   a. Click the check box corresponding to the report(s) you want to delete.

   b. Click **Delete Report(s)**.

5. To delete all reports:
   a. Click **Select All**.
   b. Click **Delete Report(s)**.

CHAPTER 8

Blogs for Administrators

In This Chapter

Create a Blog

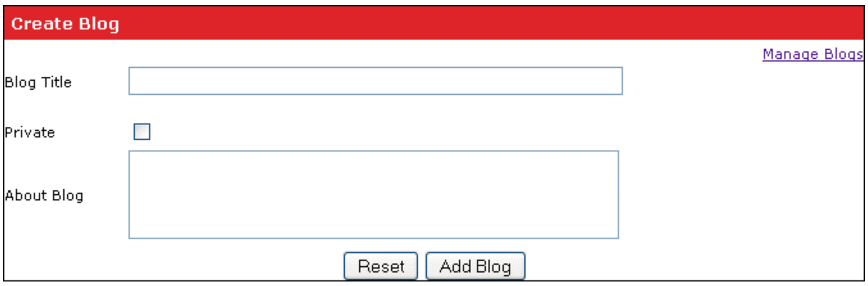
As a blog administrator, you can create new blogs for Skillport users. There can be multiple blogs per Skillport site.

To create a new blog

1. Click **Quick Links > Blog**.
2. Click **Manage Blogs**.

   The Manage Blogs page displays.
3. Click **Add New.**

   The Create Blog page displays:



4. Enter the following information:
   - **Blog Title:** The name of the blog. Max number of characters: 60.

   Note: Blog Title is mandatory. Failure to enter a blog title results in an error message.

   - **Private:** Select this to set the blog to Private, which makes it visible to ***assigned users*** on page 576 only.
   - **About Blog:** Enter basic blog information (such as a description).

- **Reset:** Click to clear all fields.
- **Add Blog:** Click to create the blog. You are automatically redirected to the Manage Blogs page.

Edit a Blog

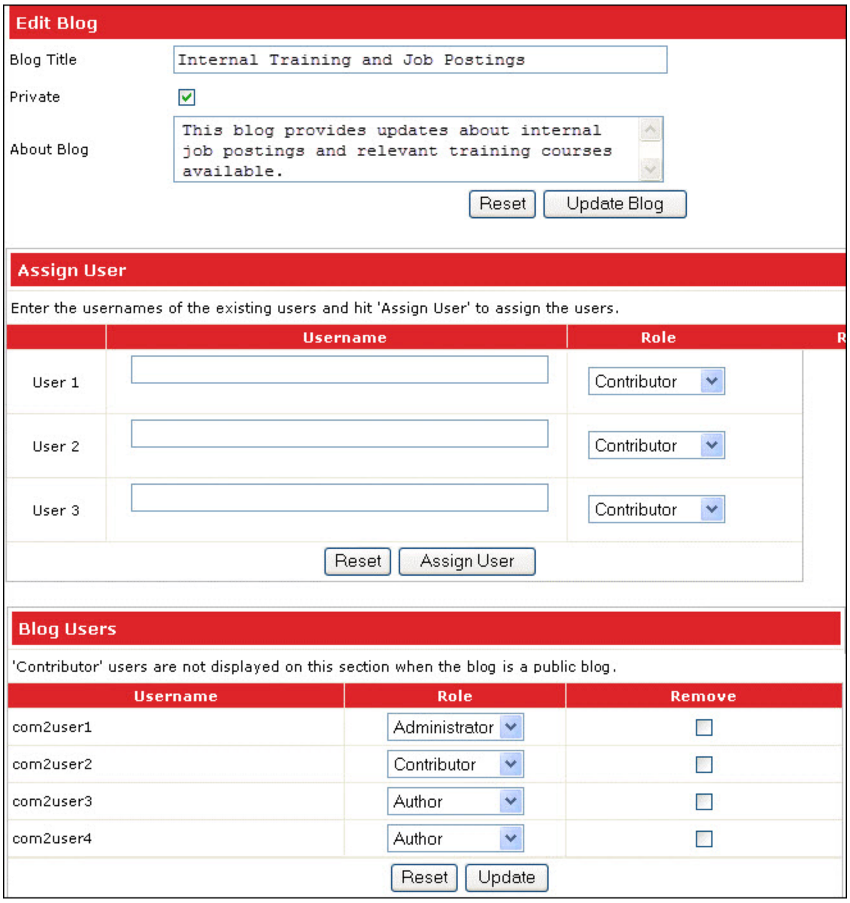
When editing a blog, you are able to update the **Blog Title** and **About Blog** fields which have been added when creating a blog. You can also set a blog to private or public. For more information about blog users, see Assign Members to a Private Blog and Assign Blog Roles to a User.

To edit an existing blog

1. Click **Quick Links > Blog**.
2. Click **Manage Blogs**.

   The Manage Blogs page displays.
3. Click the title of the blog you wish to edit.

   The Edit Blog page displays:



4. Modify the information as necessary:

- **Blog Title:** The name of the blog. Max number of characters: 60.

Note: Blog Title is mandatory. Failure to enter a blog title results in an error message.

- **Private:** Select this to set the blog to Private, which makes it visible to ***assigned users*** on page 576 only.
- **About Blog:** Enter basic blog information (such as a description).
- **Assign User:** See Assign Members to a Private Blog.
  - **Username:** Enter a valid Skillport user name in the text box.
  - **Role:** Select one of the available Blog Roles in the drop-down list.
- **Blog Users:** See Assign Blog Roles to a User.
  - **Username:** Enter a valid Skillport user name in the text box.
  - **Role:** Select one of the available Blog Roles in the drop-down list.
  - **Remove:** Select to remove a user from the list.
- **Reset:** Click to clear all fields and bring back the original text in the **Blog Title** and **About Blog** fields.

5. Click **Update** to update and save your changes.

Add a New Blog Page

A page can be used to present static information to the reader. These pages are not displayed with the rest of your articles, but can be viewed individually.

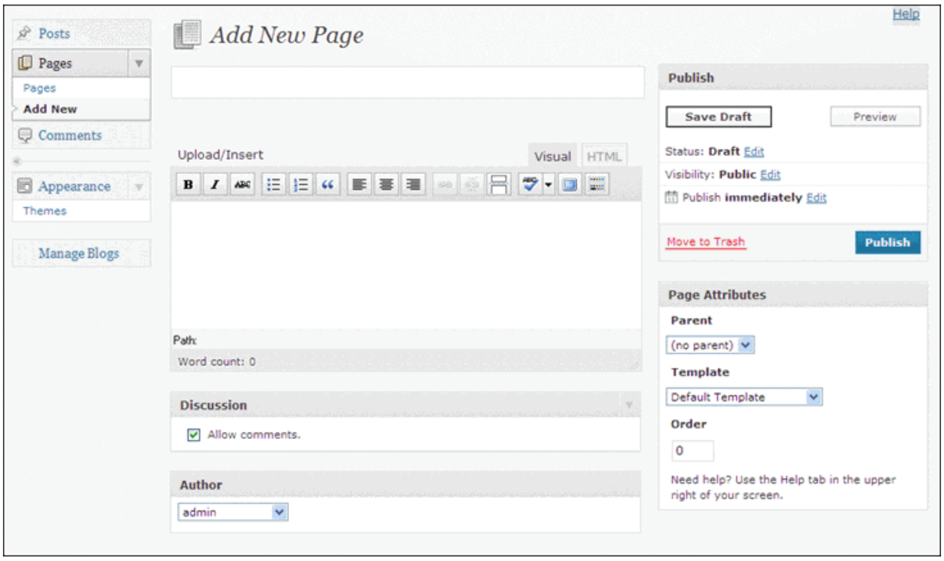
To add a new page

1. Click **Quick Links > Blog**.
2. Click **Manage Blogs**.

   The Manage Blog page displays.
3. Locate the blog you wish to edit and click **Manage this blog**.

   The blog's Manage Blog page displays.
4. On the left menu, click **Pages > Add New**.

The **Add New Page** page displays:



5. In the top blank text field, enter the page title.
6. Add the content for the page.

Note: This content can be added using either the **Visual** tab or the **HTML** tab.

7. Select the **Allow comments** option to allow discussions of the post on the blog.
8. Select an **Author** from the drop-down menu.
9. On the right panel, set the **Status**, **Visibility**, and schedule for the post.
10. Set the page attributes:
    - Select a **Parent** if you want the page you're creating to be a child page. This is optional.
    - Select a **Template** from the list.
    - Enter the **Order** to determine where the page displays on the blog. This is optional.
11. In the **Discussion** section, select the check box to allow comments for the page.
12. Click **Publish**.

    The page publishes to your blog.

Create Blog Categories

Categories allow the classification of your articles into groups and subgroups.

To create a new category for a blog

1. Click **Quick Links > Blog**.
2. Click **Manage Blogs**.

The Manage Blogs page displays.

3. Locate the blog you wish to edit and click **Manage this blog**.

   The blog's Manage Blog page displays.

4. On the left menu, click **Categories**.

   The **Categories** page displays.

5. In the **Add New Category** dialog box, enter the following information:

   - **Name**: The name of the category must be unique, and displays in each of its assigned articles.
   - **Parent**: Selecting a Parent category makes the category you are currently creating a sub-category of it. This is an optional field.
   - **Description**: Category descriptions are optional.

6. Click **Add New Category**.

   The new category saves to your blog.

Create Blog Tags

Tags are keywords you might assign to each article. Tags provide another means to aid you in accessing information on your blog.

To create a new tag for a blog

1. Click **Quick Links > Blog**.
2. Click **Manage Blogs**.

   The Manage Blogs page displays.

3. Locate the blog you wish to edit and click **Manage this blog**.

   The blog's Manage Blog page displays.

4. On the left menu, click **Post Tags**.

   The Post Tags page displays.

5. In the **Add New Tag** section, enter the following information:

   - **Name**: The tag name must be unique and displays in each of its assigned articles.
   - **Description**: A description for the tag.

6. Click **Add New Tag** to save your new tag.

Note: This tag is added to the **Popular Tags** section of the blog page.

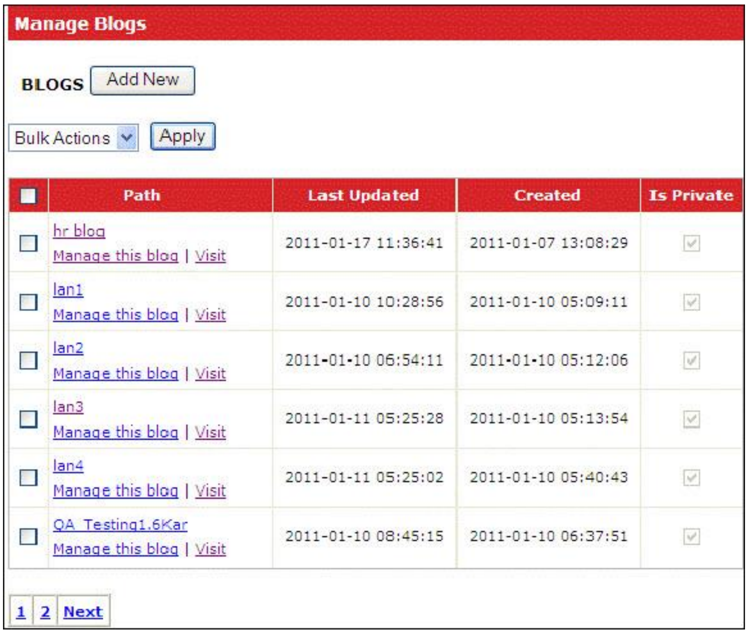
View Existing Blogs

All existing blogs display in the **Manage Blogs** page.

To view existing blogs

1. Click **Quick Links > Blog**.
2. Click **Manage Blogs**.

   The Manage Blogs page displays and lists all existing blogs:



- **Add New:** Click to create a new blog.
- **Bulk Actions:** After selecting one or more blogs from the list, select:
  - **Enable:** Makes the blog available to all users (if public) or assigned users (if private).
  - **Disable:** Makes the blog unavailable to all users.
- **Apply:** Click to enable or disable the selected blogs.
- **Path:** The blog title, the management page for the blog, and the link to the blog.
- **Last Updated:** Date of the last blog update.
- **Created:** Date the blog was created.
- **Is Private:** Denotes if the blog is public (available to all) or private (available to ***assigned users*** on page 576 only).

Manage Blog Themes

The **Manage Themes** section enables you to set a theme of your choice. The theme you choose changes the look of your blog.

To set a theme

1. Click **Quick Links > Blog**.
2. Click **Manage Blogs**.

   The Manage Blogs page displays.
3. Locate the blog you wish to edit and click **Manage this blog**.

   The blog's Manage Blog page displays.
4. On the left menu, click **Themes > Appearance**.

   The Manage Themes page displays, showing the current theme applied to the blog.
5. Select a theme from the **Available Themes** section.
6. Click **Preview** to preview the blog using the selected theme before activating it.
7. Click **Activate** to activate the new theme.

Moderate Blog Comments

You are able to manage and moderate all comments entered by users. This uses a variety of functions for ease of use.

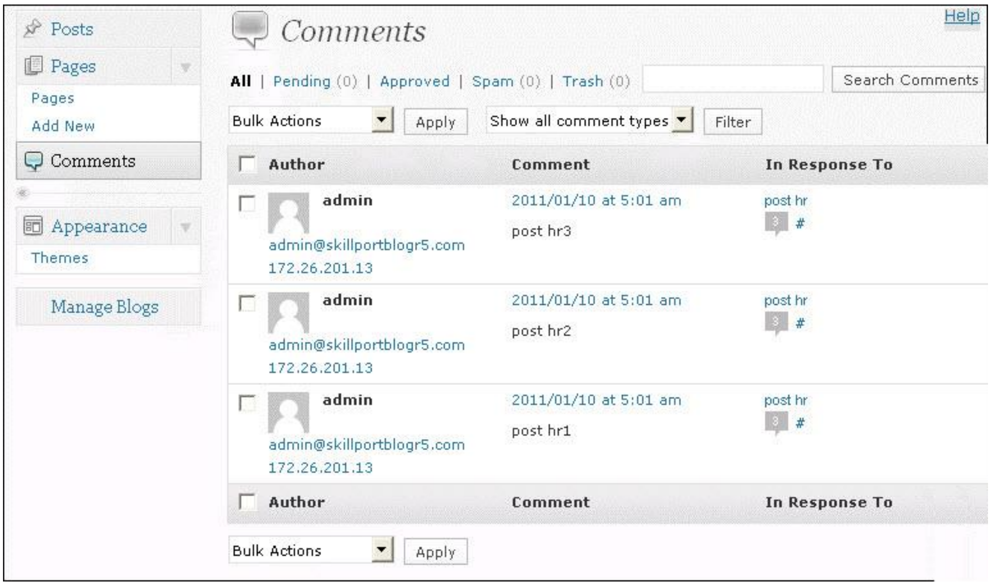
To moderate comments

1. Click **Quick Links > Blog**.
2. Click **Manage Blogs**.

   The Manage Blogs page displays.
3. Locate the blog containing the comments you wish to moderate and click **Manage this blog**.

   The blog's Manage Blog page displays.
4. On the left menu, click **Comments**.

The **Comments** page displays:



The **Comments** page lists all the comments for a particular blog, so you can manage the comments listed.

- **Author**: The name and details of the author of the comment.
- **Comment**: The comment that's been flagged for moderation.
- **In Response To**: The article associated with the comment.

5. Find the comment you want to modify:

- **Search:** At the top right of the page, enter the comment title and click **Search Comments**.

  All: Click to view all available comments for the blog.

  Pending: Click to see only comments requiring moderation.

  Approved: Click to see only approved comments.

  Spam: Click to see only comments marked as spam.

  Trash: Click to see only comments marked for deletion.

  Search text field: Enter a specific comment title and click **Search comments**.

- **Bulk Actions:** Select the comments you wish to manage and select one of the following Bulk Action options:

  Approve: Approves the comments as acceptable for the discussion/article.

  Unapprove: Removes the approval of the comment, marking it as unacceptable for the blog post.

  Mark as Spam: Marks the comment as a spam comment and removes it from the blog post.

  Move to Trash: Adds the comment to the trash.

- **Apply:** Click to apply the selected Bulk Action to the selected comments.

- **Select Comment Types:** Select a comment type to display those types.

6. Modify the comment using one of the following options:
   - **Unapprove**: Hides the comment from the blog post. The comment still exists in the list.
   - **Approve:** Displays the comment on the blog post.
   - **Reply**: Posts a reply to the comment, which displays on the blog post.
   - **Quick Edit**: Edits the comment itself. The comment displays on the blog post as *Edited*.
   - **Edit**: Opens the **Edit Comment** page for further edits to the comment. The comment displays on the blog post as *Edited*.
   - **Spam**: Marks the comment as spam. These comments display when filtering for spam but do not display to the contributors and readers.
   - **Trash**: Deletes the comment.

View Blog Reports

Blog reports allow you to view the following information:

- Average number of articles per blog.
- Average subscribers per blog.
- Average number of comments per blog.
- Average number of comments per blog article.
- Total number of subscribers to blogs.

To view reports

1. Click **Quick Links > Blog** at the top of the page.
2. On the Blog page, click **Blog Reports**.

The Blog Reports page displays.

Blog Reports	
Summary	
Average number of articles per blog :	1
Average subscribers per blog :	8
Average number of comments per blog :	1
Average number of comments per blog article :	2
Total number of subscribers to blogs	
Blog	**No of subscribers**
skillportblogr5 title	3
hr blog	9
lan1	9
lan2	5
lan3	4
lan4	17
QA_Testing1.6Kar	7
Nature of Animals	4
Languages	20
Birds	4

Managing Blog Users

Assign a User as Blog Administrator

When the blog site is first implemented, one user is initially assigned as the blog administrator. That administrator can then subsequently assign other users as blog administrators. There can be multiple blog administrators per site, and each has permission to administer any blog on the site, including Private blogs.

To assign a user as blog administrator

1. As a blog administrator, click **Quick Links > Blog**.
2. Click **Manage Blogs**.
3. Click the **Manage this blog** link below the title of the blog you want to administer.

   The Edit Blog page displays.
4. In the **Assign Users** section, enter a valid Skillport **Username**, then select **Administrator** from the **Role** drop-down.
5. Click **Assign Users**.

   The specified user now has administrator privileges over all blogs, and will continue to do so until his username is removed or his role is changed.

Assign Blog Roles to a User

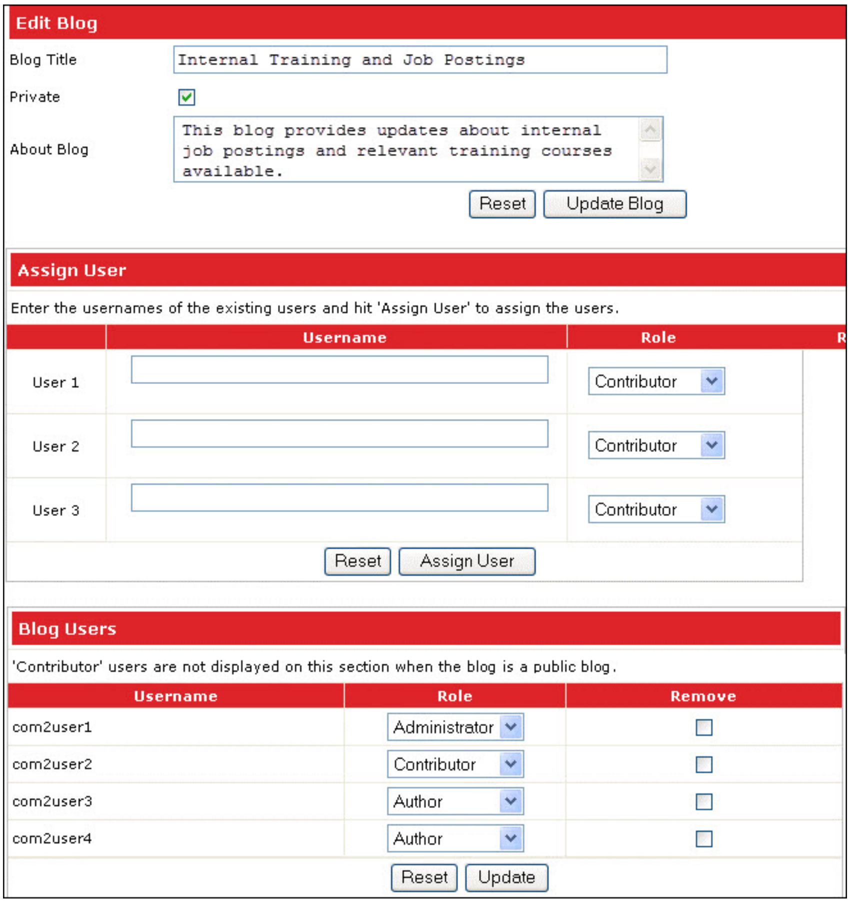
You can assign blog roles to users.

To assign blog roles to a user

1. Click **Quick Links > Blog**.
2. Click **Manage Blogs**.

   The Manage Blogs page displays.
3. Click the title of the blog you wish to edit

   The Edit Blog page displays.



4. In the **Blog Users** section, enter a valid Skillport **Username** in the text box.
5. Select one of the available blog roles in the **Role** drop-down list.
6. Click **Update**.

   The usernames are checked against the system, and once verified, the blog roles are assigned.

Assign Members to a Private Blog

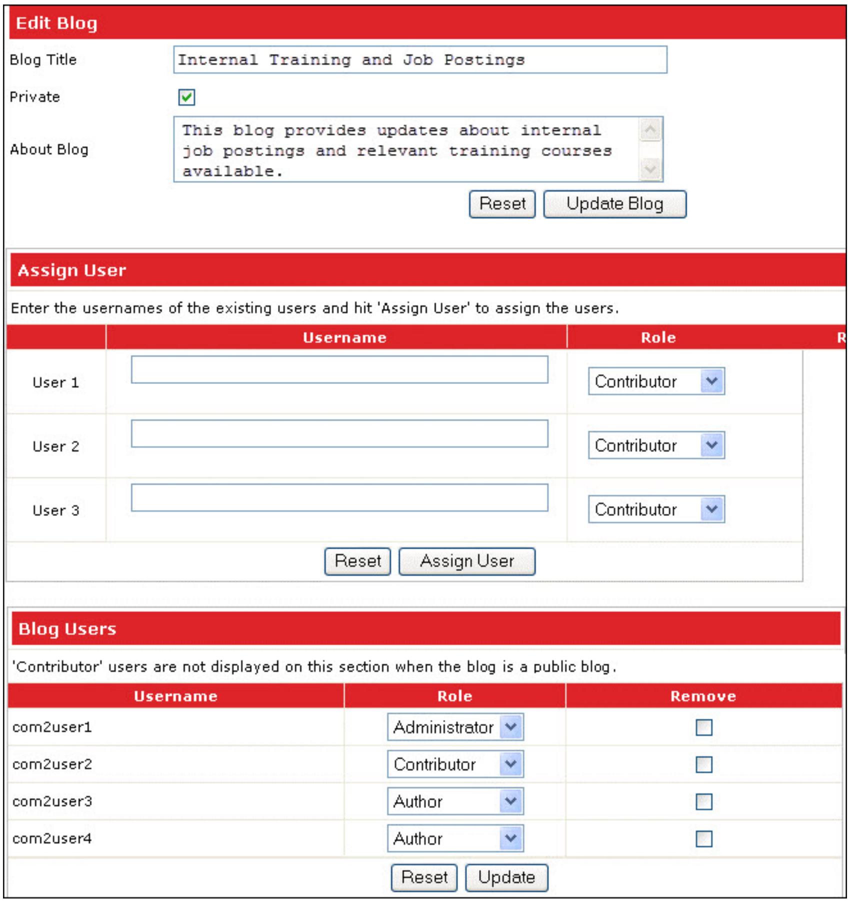
You can assign specific members to a private blog, which provides access to members only.

To assign members to a blog

1. Click **Quick Links > Blog**.
2. Click **Manage Blogs**.

   The Manage Blogs page displays.
3. Click the title of the blog you wish to edit.

   The **Edit Blog** page displays:



4. In the **Assign User** section, enter a valid Skillport **Username** in the text box.
5. Select one of the available Blog Roles in the **Role** drop-down list.
6. Click **Assign User**.
7. Click **Update**.

   The username is checked against the system, and once verified, the user is added as a member of the private blog and can now see all posts.

Remove Members from a Private Blog

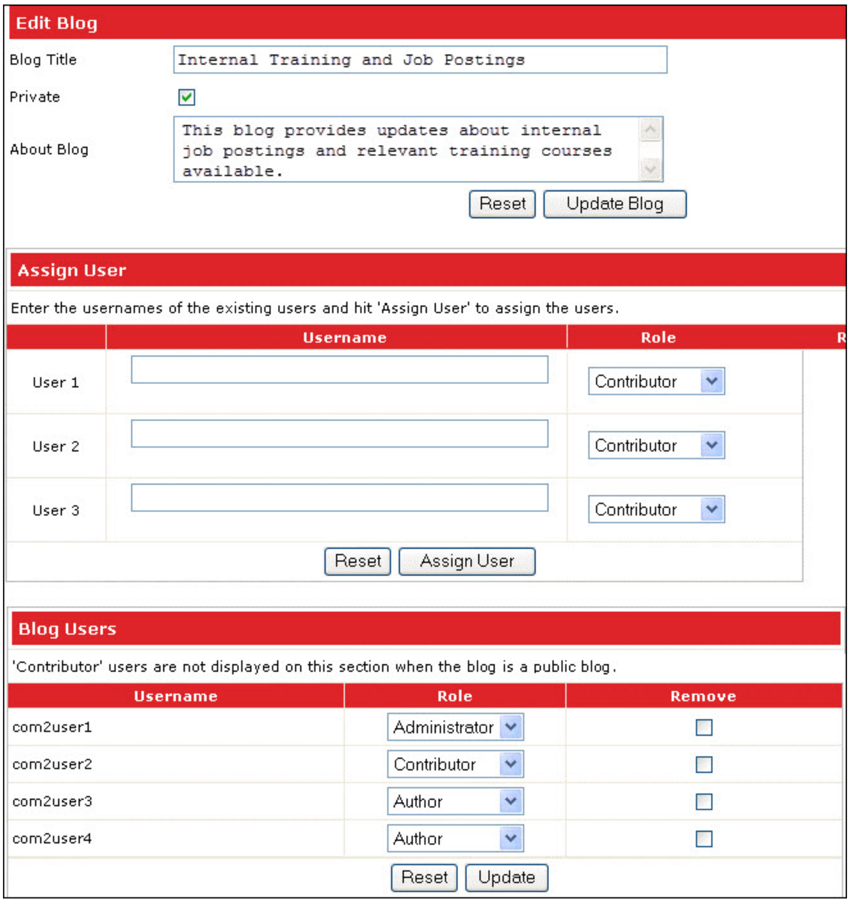
You can remove specific members from a blog.

To remove members from a blog

1. Click **Quick Links > Blog**.
2. Click **Manage Blogs**.

   The Manage Blogs page displays.
3. Click the title of the blog from which you wish to remove members.

   The Edit Blog page for the selected blog displays:



4. In the **Blog Users** section, select the check box next to the user(s) you wish to remove.
5. Click **Update**.

   The selected users are removed from the member list and can no longer view the blog posts or content.

CHAPTER 9

Wikis for Administrators

In This Chapter

Wiki Workflow

The wiki workflow indicates the order of events and tasks that the wiki administrator performs. To get started with using wikis, follow the order indicated in the workflow.

Workflow for Wiki Admin

1. Create a wiki. Wikis can be Public or Private.

   Note: If the wiki is Private, only assigned users can access the wiki.

2. View existing wikis to view the properties of a wiki.
3. Set up user roles for Skillport users in a wiki by enabling a particular set of users to access the wiki and perform various tasks based on their user privilege.
   c. Assign user roles as wiki administrator, author, or contributor. All users who have access to a wiki are contributors by default.
   d. Change the user role for a particular user.
4. Protect an article to prevent it from being edited.
5. Block an article to prevent certain users from viewing it.
6. Moderate discussions. This involves moderating comments or discussions by replying to an author, editing comments, and deleting comments.
7. View wiki reports.

Create a Wiki

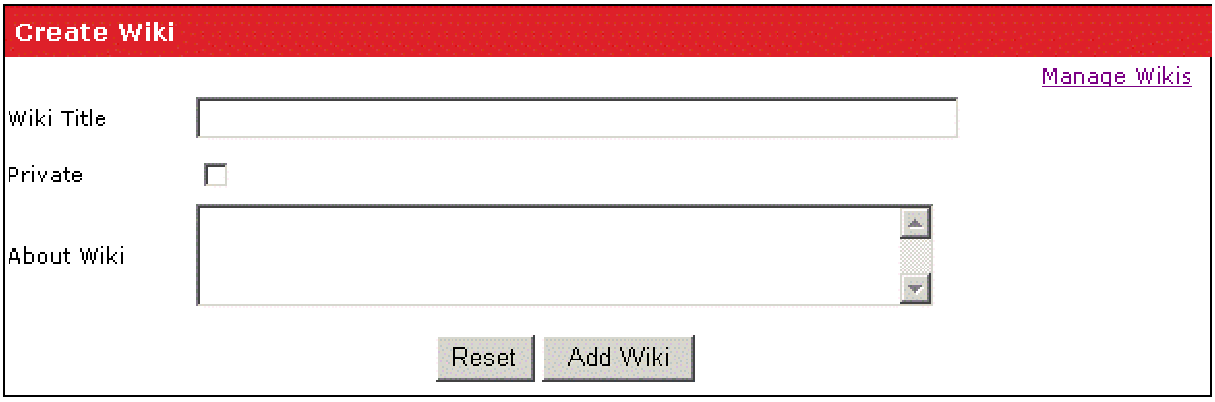
As a wiki administrator, you can create new wikis for Skillport users. There can be multiple wikis per Skillport site.

Unless you select the **Private** option, the wiki is Public and can be contributed to and viewed by all users. If you specify the wiki as Private, only those users that you assign to the wiki will have access to it.

To create a new wiki

1. Click **Quick Links > Wiki**.
2. Click **Manage Wikis**.
3. On the Manage Wikis page, click **Add New**.

   The Create Wiki page displays.



4. Enter details about the wiki:
   - **Wiki Title**: (Required) The name of the wiki. The title displays on the Skillport Wikis page and the Manage Wikis page.
   - **Private** check box: Select this option to indicate the wiki is Private (available only to assigned users). Leave unchecked to indicate the wiki is Public (available to all users).
   - **About Wiki**: A brief description of the wiki. You can enter a maximum of 300 characters. This description displays below the Wiki title on the Skillport Wikis page.
5. Click **Add Wiki**. The wiki is added to the list of wikis on the Manage Wikis page.

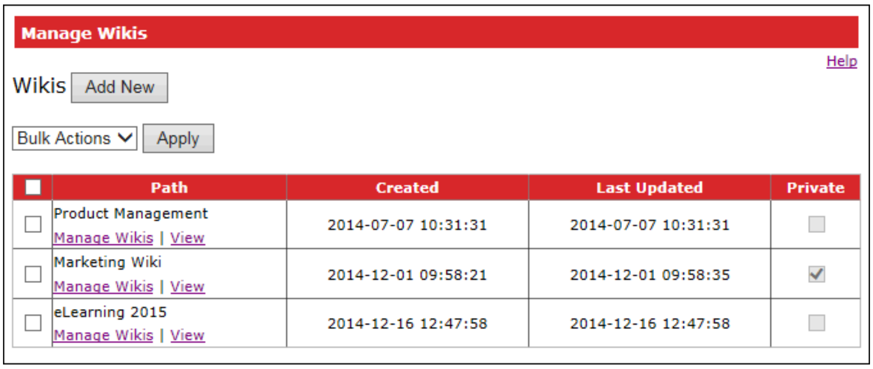
View Existing Wikis

All existing wikis display in the Manage Wikis page.

To view existing wikis

1. Click **Quick Links > Wiki**.
2. Click **Manage Wikis**.

The Manage Wikis page displays a list of the existing wikis.



- **Add New**: Click to create a new wiki.
- **Bulk Actions**: After selecting one or more wikis from the list, select **Delete** to delete one or more wikis.
- **Apply**: Click to delete the selected wikis.
- **Path**: Displays the wiki title, a link to the management page for the wiki, and a link to the wiki itself.
- **Created**: Displays the date and time the wiki was created.
- **Last Updated**: Displays the date and time the wiki was last modified.
- **Private**: When selected, indicates the wiki is private (available to assigned users only). If cleared, the wiki is public (available to all users).

Note: The **Add New** button and the **Bulk Actions** drop-down list are only visible to wiki administrators.

Edit Wiki Details

Wiki administrators can modify all the details for a wiki. If you have author privileges for a wiki, you can edit the About Wiki description only.

To edit wiki details

1. Click **Quick Links > Wiki**.
2. Click **Manage Wikis**.

   The Manage Wikis page displays.
3. Click the **Manage Wikis** link for the desired wiki.

   The Edit Wiki page displays.

4. Click the desired wiki name to display the Edit Wiki page.

5. Edit the wiki details as desired:

   - **Wiki Title**: (Required) The name of the wiki. The title displays on the Skillport Wikis page and the Manage Wikis page.

   - **Private** check box: Select this option to indicate the wiki is Private (available only to assigned users). Leave unchecked to indicate the wiki is Public (available to all users).

   - **About Wiki**: A brief description of the wiki. You can enter a maximum of 300 characters. This description displays below the Wiki title on the Skillport Wikis page.

6. Click **Update Wiki**.

7. Click the **Manage Wikis** link in the upper right corner of the page to return to the Manage Wikis page.

Delete a Wiki

You can delete one or more wikis at a time.

To delete a wiki

1. Click **Quick Links > Wiki**.

2. Click **Manage Wikis**.

   The Manage Wikis page displays.

3. Select the check box next to the wiki(s) you want to delete.

4. In the **Bulk Actions** drop-down list, select **Delete**.

5. Click **Apply**.

6. In the message asking if you want to permanently delete the wiki(s), click **OK**.

   The wiki(s) no longer display in the list on the Manage Wikis page.

Moderate Wiki Content

If you are an author or a wiki administrator, you can moderate wiki comments and discussions by replying to an author, editing comments, and deleting comments.

To moderate wiki content

1. Click **Quick Links > Wiki**.
2. Click **Manage Wikis**.

   The Manage Wikis page displays.
3. Locate the desired wiki in the list and click **View**.

   The wiki's Main Page displays.
4. Click the **Discussion** tab.
5. Click the **Edit** tab. The Edit page displays.
6. Enter/modify the desired text.
7. Click  on the toolbar to insert your signature and timestamp.
8. Click **Save Page**.

   The edits are published and details of the edit are listed on the **View history** tab.

Protect an Article

You can protect an article from being edited or moved by specifying access for certain groups of users. You can apply these two methods of protection separately.

- **Edit**: Specify users who are authorized to modify the article.
- **Move**: Specify users who can only rename the article.

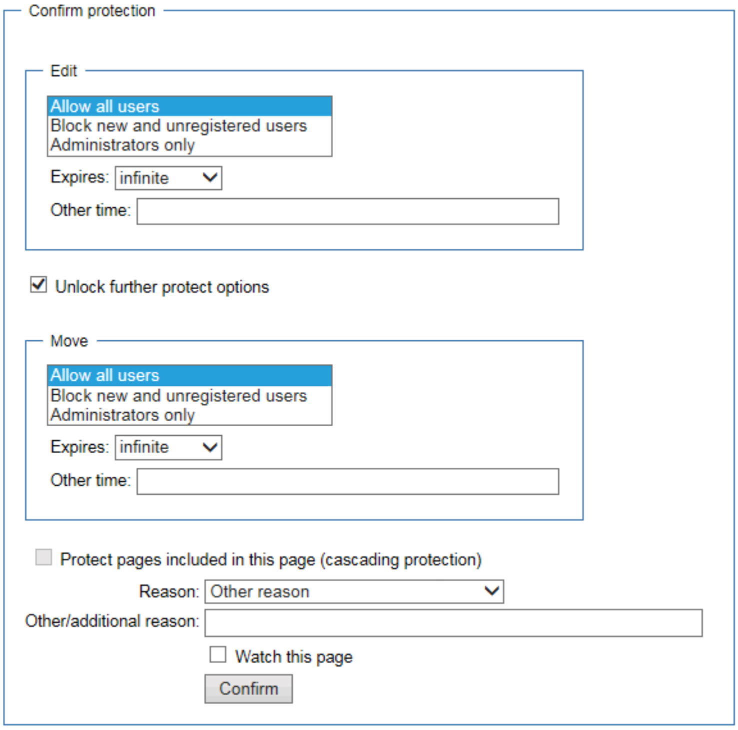
You can also specify when the article protection expires. The default expiration value is **infinite** (never expires).

To protect an article

1. Click **Quick Links > Wiki**.
2. Click **Manage Wikis**.

   The Manage Wikis page displays.
3. Locate the desired wiki in the list and click **View** .
4. Navigate to the article you want to protect.
5. Select **Protect** from the Arrow drop-down menu.

The Change Protection Level page displays.



6. Apply the desired protection settings.

7. Click **Confirm**.

Note: Once the article is protected, the **Protect** menu option changes to **Unprotect**, which you can subsequently select to modify the protection or change the expiration date.

Block Users from an Article

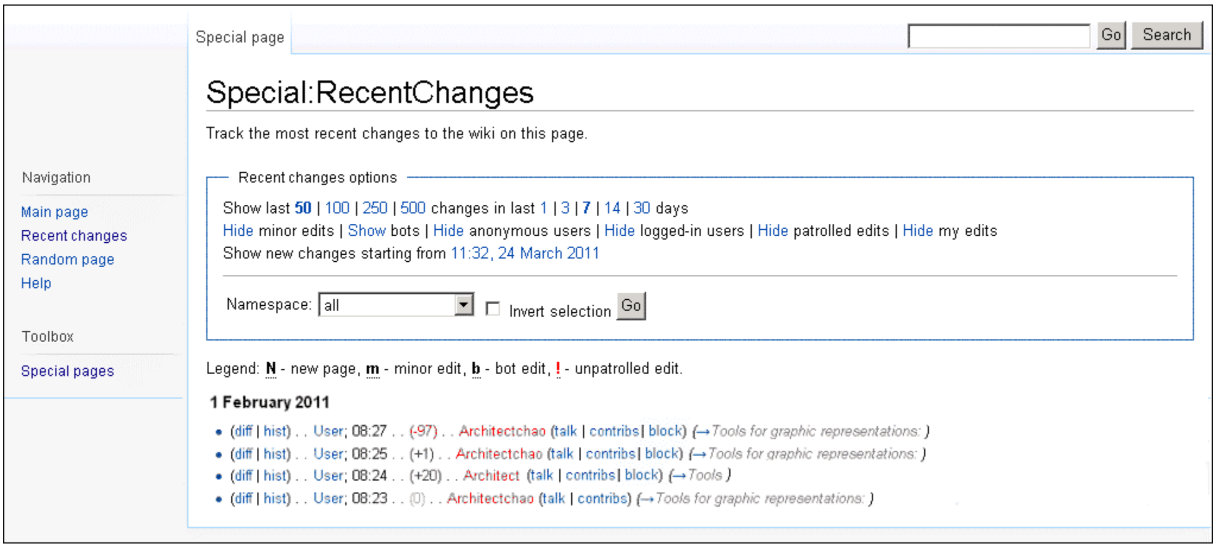
You can block a user from editing an article and create reasons as to why you want to block the particular user.

To block a user from an article

1. View the Wiki Main page.

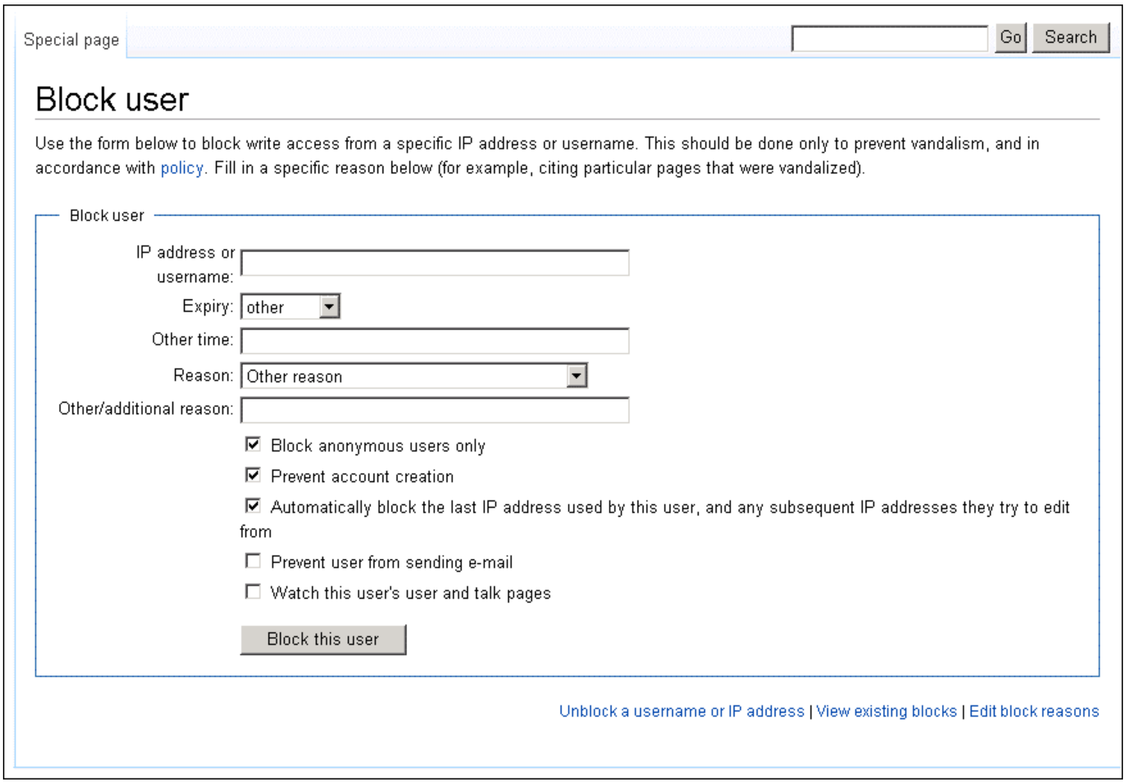
2. In the left pane, click **Recent changes**.

The Recent Changes page displays a list of all recent changes made to several articles. Each of the changes displays the user name of the author who modified the article.



3. Click the **block** link that displays within the brackets next to the author name.

   The Block user page displays.



4. Enter the following information:

   - **IP address or username**: Enter the IP address or the name of the registered user account to be blocked.

Note: Nonexistent authors can also be blocked; therefore, ensure you have entered the author's name correctly.

- **Expiry**: Select when the block should expire, or manually enter an expiration time.
- **Reason**: Select the reason for blocking an author.

Note: You can also edit an existing reason or create a new reason. For more information, see the procedure below.

- **Other/ additional reason**: (Optional) Select one or more options. These options are based on whether an author or an IP address is being blocked.

5. Click **Block this user**. The author is blocked and is not authorized to comment on or discuss an article.

To edit or create block reasons

1. Click **Edit block reasons** in the lower-right corner of the **Block user** page.
2. In **Edit**, enter the reason for blocking the author.
3. Click **Save**. The block reason displays in the **Reason** drop-down list.

Note: The block reasons will not be localized if you want to localize a particular wiki. To ensure that the block reasons are also localized, enter the block reasons in the corresponding language, by installing the relevant language package and pasting the reasons in the required language.

View Wiki Reports

You can view various reports about a specific wiki. You view a report of the most linked-to categories, files, pages, and templates, pages with the most categories and most revisions, popular pages, and wiki statistics.

To view wiki reports

1. View the Wiki Main page.
2. In the left pane, click **Special pages**.

Note: The **Special pages** link is not available for contributors.

3. In the **Wiki data and tools** section and the **High use pages** section, click the desired link to display the corresponding report.

Managing Wiki Users

Assign a User as Wiki Administrator

When the wiki site is first implemented, one user is initially assigned as the wiki administrator. That administrator can then subsequently assign other users as wiki administrators. There can be multiple wiki administrators per site, and each has permission to administer any wiki on the site, including Private wikis.

To assign a user as wiki administrator

1. As a wiki administrator, click **Quick Links > Wiki**.
2. Click **Manage Wikis**.
3. Click the **Manage Wikis** link below the title of the wiki you want to administer.

   The Edit Wiki page displays.
4. In the **Assign Users** section, enter a valid Skillport **Username**, then select **Administrator** from the **Role** drop-down.
5. Click **Assign Users**.

   The specified user now has administrator privileges over all wikis, and will continue to do so until his username is removed or his role is changed.

Assign Users to a Private Wiki

You can assign specific users and associated wiki roles for a private wiki. Available roles are **Contributor**, **Author**, and **Administrator**. For more information about these roles, see Wiki Roles.

You can assign a maximum of five users at a time to a wiki.

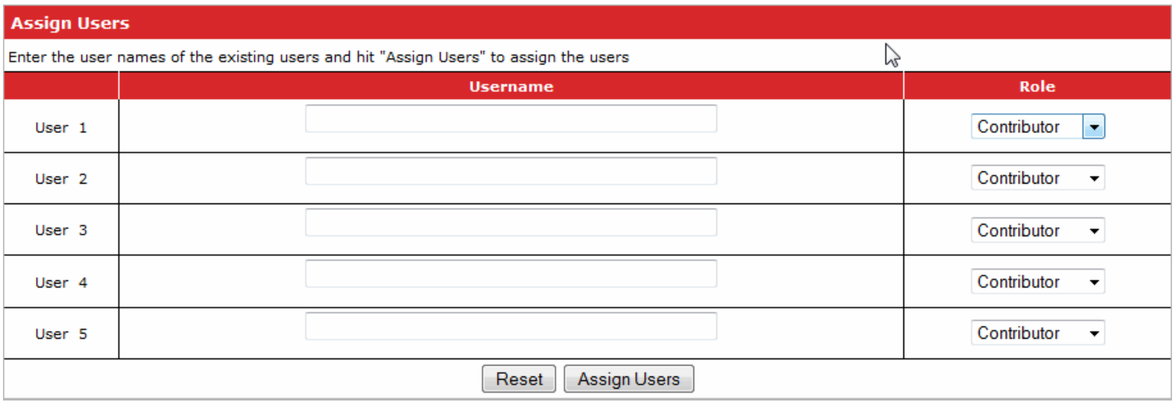
To assign users to a wiki

1. Click **Quick Links > Wiki**.
2. Click **Manage Wikis**.

   The Manage Wikis page displays.
3. Click the **Manage Wikis** link for the desired wiki.

   The Edit Wiki page displays.

4. In the **Assign Users** section, for each user you want to add:



   e. Enter a valid Skillport **Username**.

   f. Select the desired **Role** from the corresponding drop-down list.

5. Click **Assign Users**.

   The usernames and roles display in the Wiki Users section.

Remove Users from a Private Wiki

You can remove existing users from a private wiki.

To remove users from a wiki

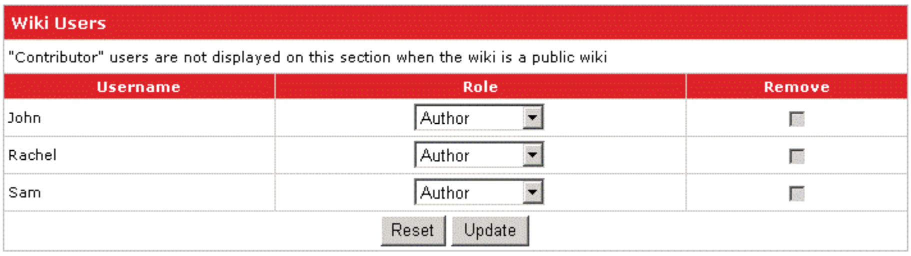
1. Click **Quick Links > Wiki**.
2. Click **Manage Wikis**.

   The Manage Wikis page displays.

3. Click the **Manage Wikis** link for the desired wiki.

   The Edit Wiki page displays.

4. In the **Wiki Users** section, select the **Remove** check box for each user you want to remove.



5. Click **Update**.

   The selected users are removed from the Wiki Users list and can no longer view the wiki.

Change a User's Role

You can change a user's role for a specific wiki.

To change a user's role

1. Click **Quick Links > Wiki**.
2. Click **Manage Wikis**.

   The Manage Wikis page displays.
3. Click the **Manage Wikis** link for the desired wiki.

   The Edit Wiki page displays.

   Note: If the wiki is Public, any users that you change to a Contributor role will no longer display in the **Wiki Users** section after you click **Update**.
4. In the **Wiki Users** section, for the desired user, select one of the available wiki roles in the **Role** drop-down list.
5. Click **Update**.

CHAPTER 10

Technical Support

Our Skillsoft Support Professionals are ready to answer your request 24 hours a day, 7 days a week.

Access the site http://support.skillsoft.com/ to search our solution libraries and Frequently Asked Questions (FAQs), create a support case, or to obtain a list of our international phone numbers.

