Registration & Enrollment Module & Dashboard Administration Guide

Version 4.8.4.45

For Microsoft SharePoint Server

ELEARNINGFORCE

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1 REM CONFIGURATION

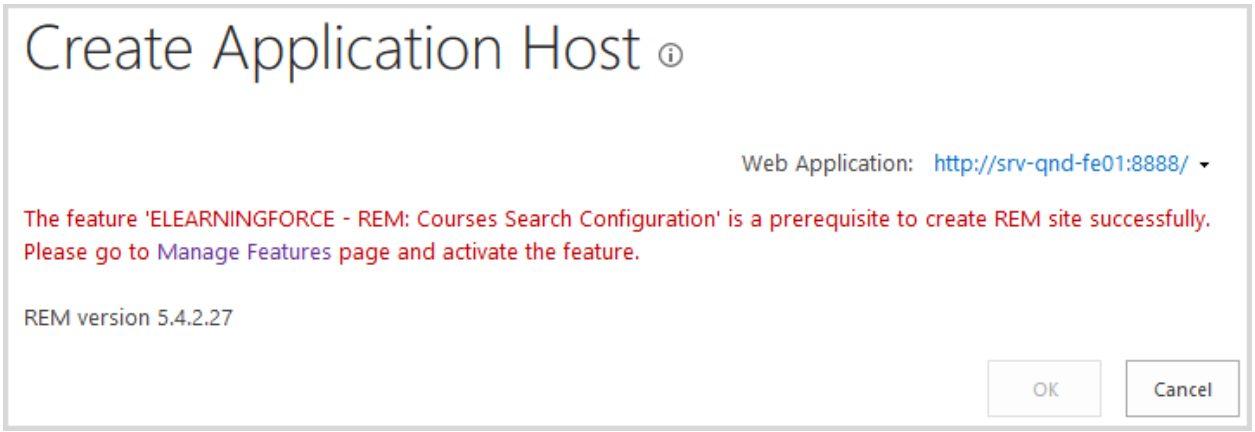
After the installation has been completed successfully, REM must be configured.

1.1 Create REM Application Host

'ELEARNINGFORCE - REM: Courses Search Configuration' feature is a prerequisite for creating REM host site collection. It is a web application scoped feature that ensures (creates if not exist) needed crawled properties, managed metadata properties and term store group. The system attempts to activate it automatically during product installation.

NOTE:	At least one site collection must be available on the web application hosting SharePoint LMS in order for this feature to be activated successfully.

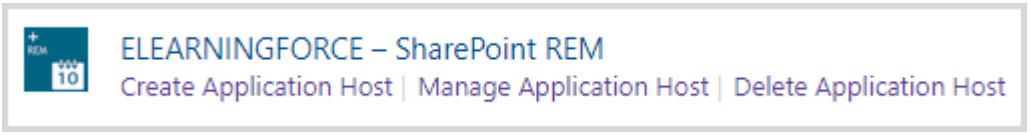
However, if any problems are met during activation of it you will see a warning when you go to Central Administration > Application Management > Create Application Host page:



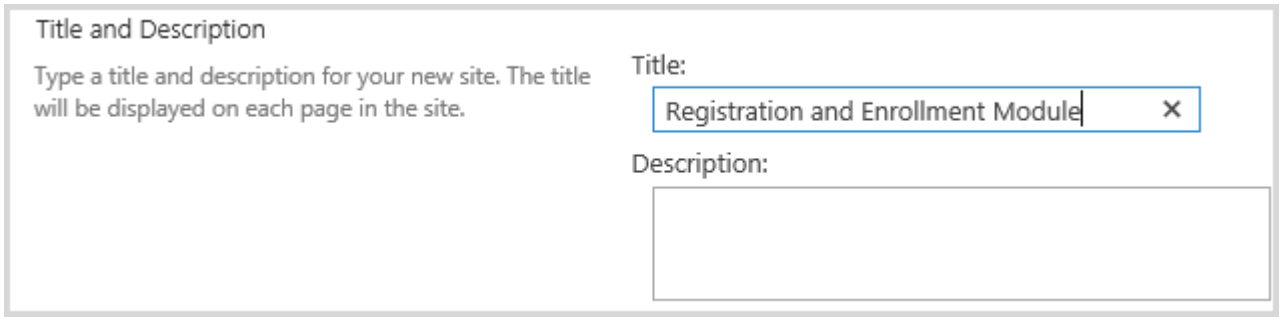
NOTE:	If you meet problems with activating 'ELEARNINGFORCE – REM: Courses Search Configuration' feature, make sure the user who activates it has permissions to create a term store group in Managed Metadata Service, else you will get the unauthorized exception while activating the feature. To verify that go to Central Administration > Application Management > Manage Service Applications>Manage Metadata Service > Term Store Administrators and check that your user has admin rights here. During the feature activating user can also get exception like: *DefaultSiteCollectionTermStore is null please configure it before activating the feature.* It could be caused by reasons described here and here.

To create REM Site Collection, do the following:

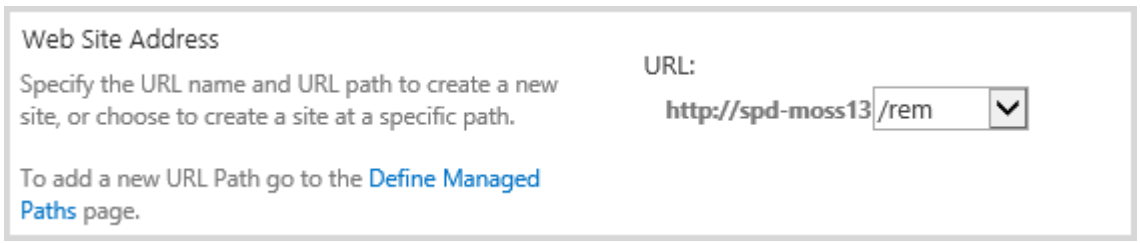
1. Go to Central Administration > Application Management > Create Application Host:



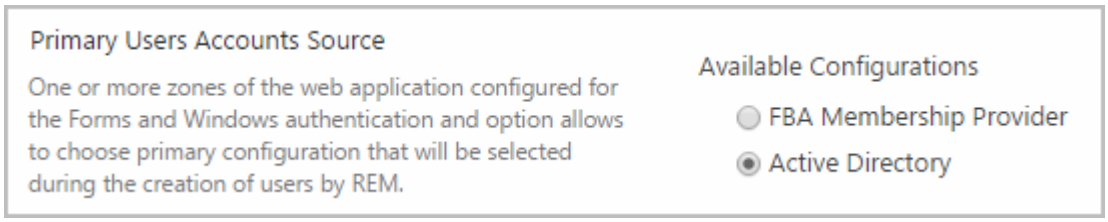
2. Complete the open form:
   - *Title and Description* – type the title and enter the short description:



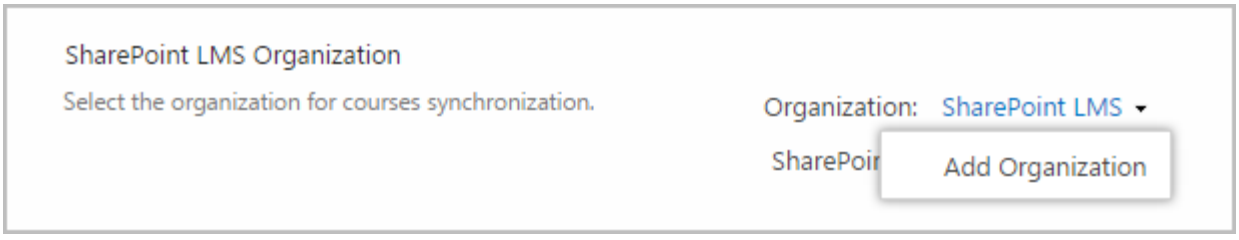
   - *Web Site Address* – type the unique site address:



   - *Primary Users Accounts Source* – select configuration for primary users accounts source: FBA Membership Provider or Active Directory:



   - *SharePoint LMS Organization* – select an organization for courses synchronization with REM site collection:

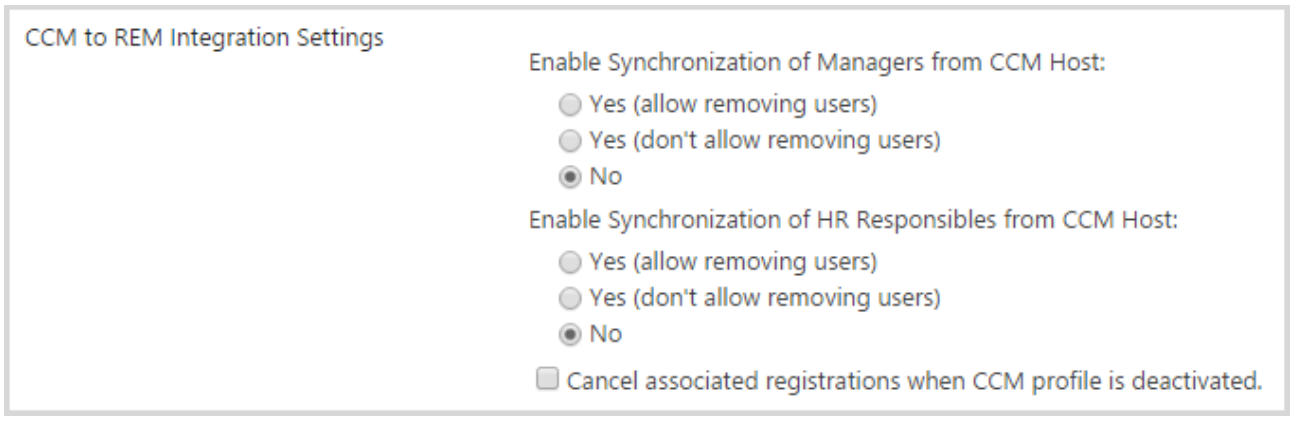


a) In the Organization section, click Add Organization;

b) In the open dialog box, select an organization from the list, and then click OK.

– *SharePoint CCM Host* – select the CCM Host for synchronization with REM site collection:

– *CCM to REM Synchronization Settings* – select whether you want to synchronize people from 'Manager' and 'HR responsible' fields of CCM profiles to SharePoint groups 'Line Managers' and 'HR responsible' respectively:

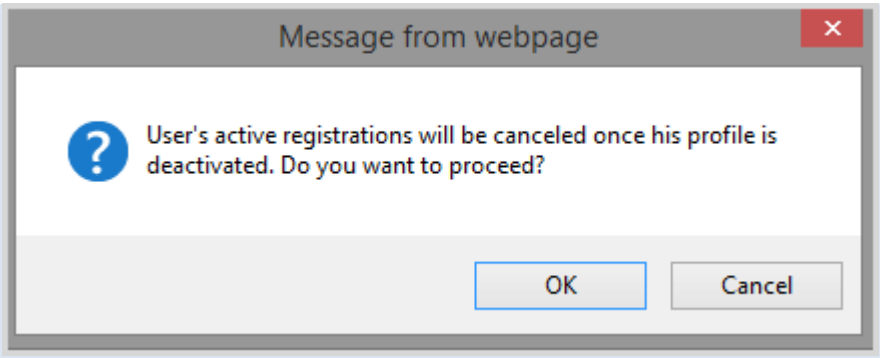


The synchronization is handled by 'ELEARNINGFORCE - REM: Managers synchronizer job' and scheduled to run hourly by default.

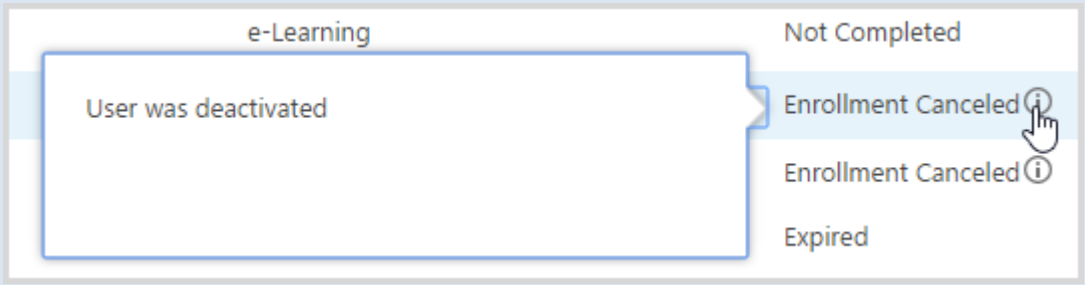
NOTE:	ELEARNINGFORCE – REM: Managers synchronizer job does not synchronize managers from Relationships list to REM Line Managers group. They are added to Dashboard Managers group and REM Line Managers group manually.
NOTE:	Managers and HR Responsibles with deactivated CCM profiles are not synchronized to REM SharePoint groups.

- *Cancel associated registrations when CCM profile is deactivated* – select the checkbox if you want to cancel associated active user's registrations (i.e. registrations with 'Enrolled', 'Wait For Approval', 'Waiting For Start', and 'In Waiting List' statuses) when his CCM profile is deactivated;

NOTE:	Whilst deactivating user's CCM profile, you will see the following warning message:

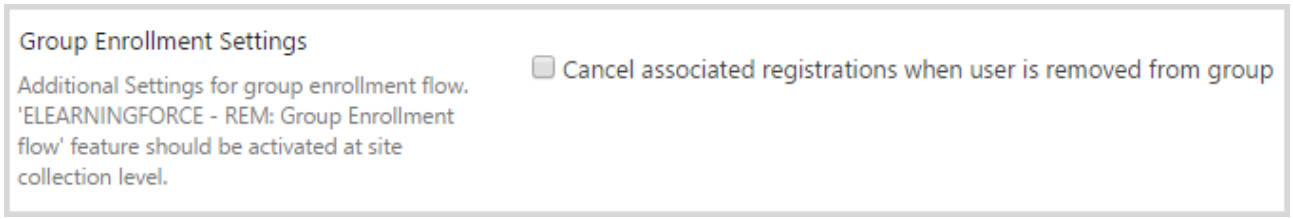


Click OK button to deactivate user's CCM profile and cancel his registrations. Now all active user's registrations will have 'Canceled' status and on the Dashboard's My Training Overview, a cancellation message will appear:



Remember that if you make user's CCM profile active again, his cancelled registrations will not change the status.

- *Group Enrollment Settings* – select the checkbox to cancel associated registrations when user is removed from group (user's active registrations (i.e. registrations with 'Enrolled', 'Wait For Approval', 'Waiting For Start', and 'In Waiting List' statuses) that were created by Group Enrollments job will be canceled). Note that 'ELEARNINGFORCE – REM: Group Enrollment flow' feature must be first activated at the site collection level:

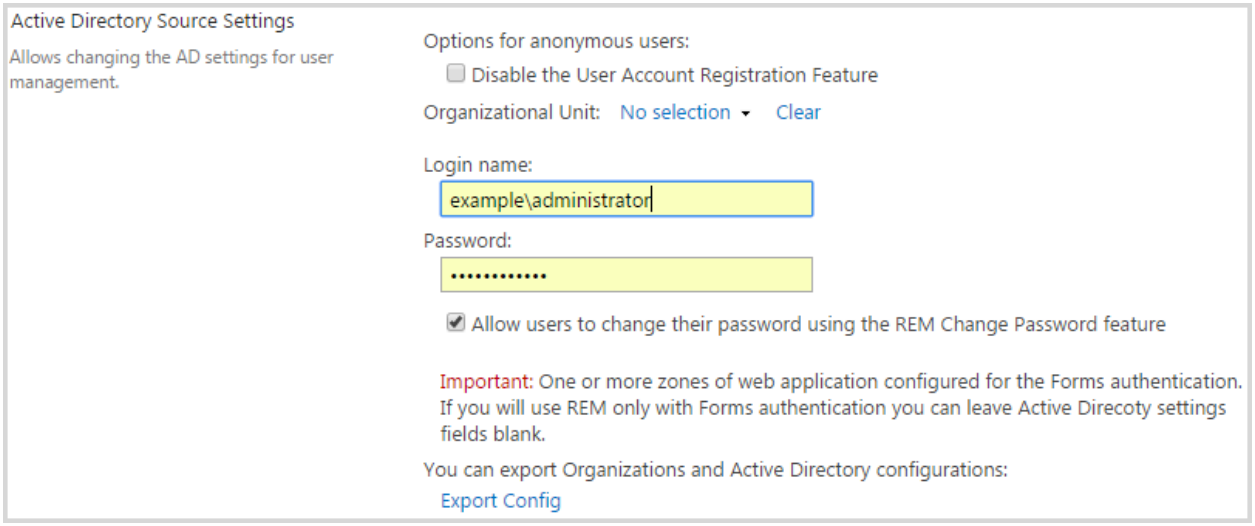


NOTE: When user that was removed from group and his registrations were canceled by Group Enrollments job is added back to the group, new registrations are created for him (after Group Enrollments timer job has run).

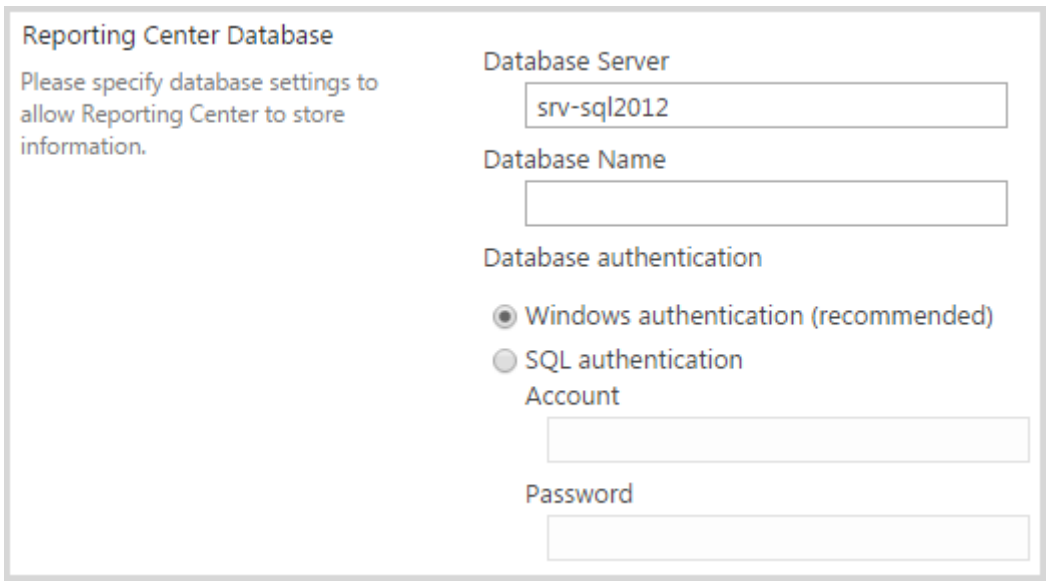
  - *Active Directory Source Settings* – configure active directory for user's source; this configuration will be saved to the *web.config* file and used for creation of users in AD:

NOTE: In FBA case default membership provider will be used for creation and storing new users.

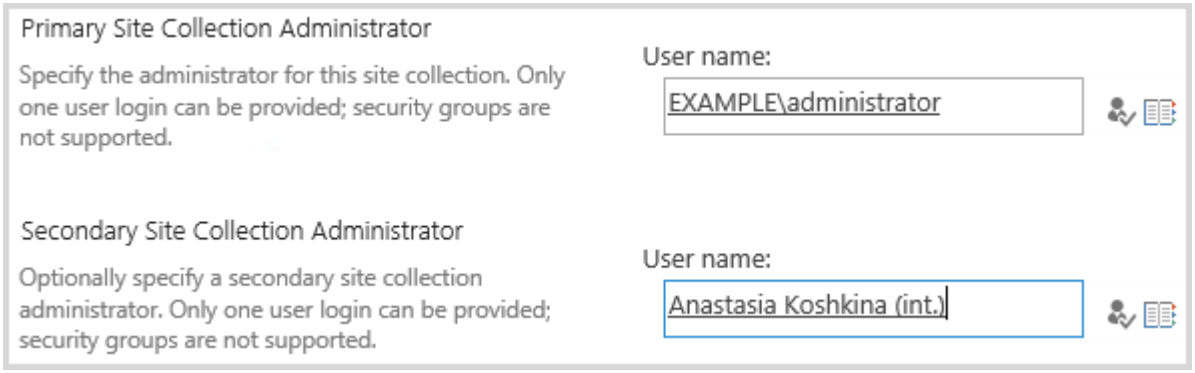
- *Disable the User Account Registration Feature* – select the checkbox to disable the fields below: if the check box is selected, ONLY the authorized users can enroll in courses. Clear the check box to allow anonymous users to enroll;
- *Organizational Unit* – select the Organization Unit that will contain new users created by REM;
- *Login name* – enter full login name of the user who has an access to Organization Unit (should be in the following format: *domain\username*). Make sure that the specified user has rights to add, edit and delete users from current Organization Unit;
- *Password* – type in the password for the user and select the checkbox if you want to allow the user to change it:



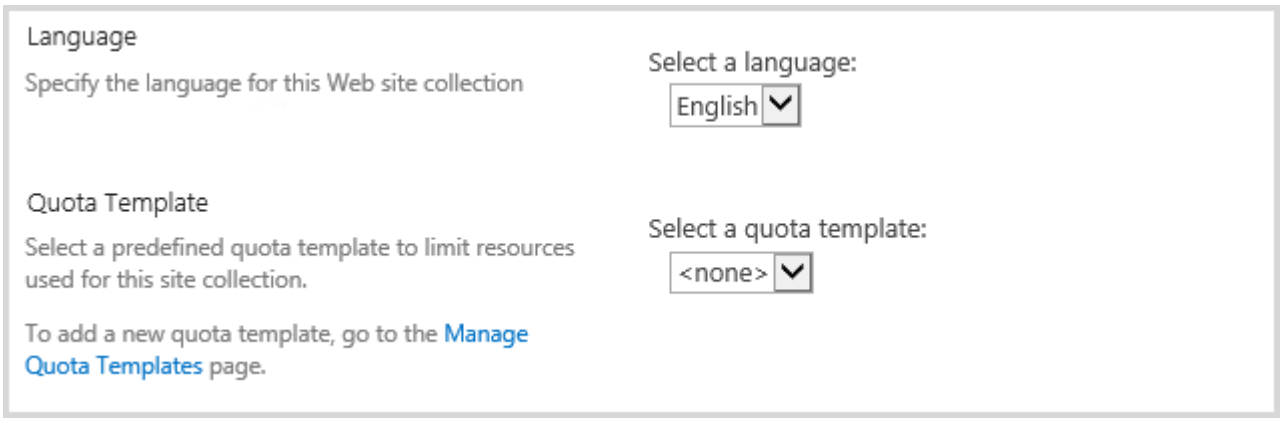
- *Import Config* – import Organizations and Active Directory configuration from the xml-file on your local computer;
- *Reporting Center Database* – configure local settings at REM site collection level (if in SharePoint Reporting Center settings 'use web application scope' is not selected):



– Specify the primary and secondary site collection administrators:

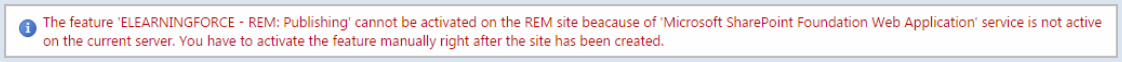
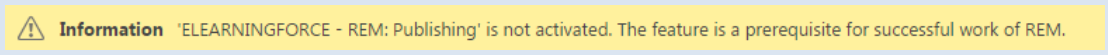


– *Language* – from the drop-down list select the language for your REM; the selection depends on the language packs installed:



3. Click OK to finish creating REM site collection. You will get the "*REM Site Collection Successfully Created*" message.

NOTE:	To be able to use the SharePoint date picker functionality, users should have access to the root site collection. Otherwise users will receive the 'Access Denied' message when trying to use a date picker. Due to this reason it is recommended to add all users to the 'Root Site Visitors' group on the top-level site after REM Site Collection creation.

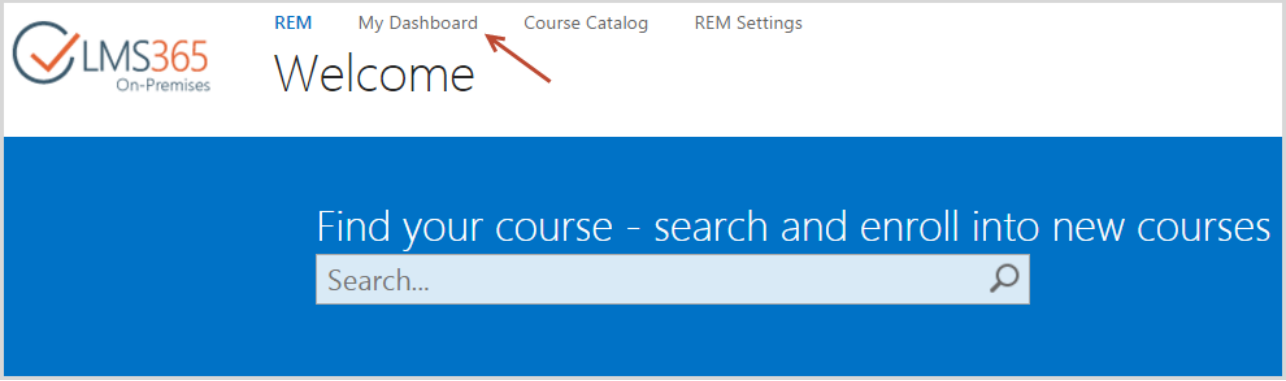
NOTE:	When Central Administration is hosted on a dedicated server 'ELEARNINGFORCE – REM: Publishing' feature cannot be activated during creation of REM Application Host. In this case a warning is displayed that REM Publishing feature should be activated manually after site is created:  When you go to the REM host site collection you will see information message about that:  Go to Site Settings > Manage site collection features and activate 'ELEARNINGFORCE – REM: Publishing' feature.

1.1.1 My Dashboard

My Dashboard is a subsite of REM site collection depending on the ELEARNINGFORCE – Dashboard: REM Integration site collection feature:

NOTE:	For automatic creation of My Dashboard subsite, Dashboard solution is required to be installed prior to SharePoint REM installation.
NOTE:	Please remember that all changes (e.g changes made to the subsite navigation; custom pages and elements) will be reverted to default each time you reactivate ELEARNINGFORCE – Dashboard: REM Integration site collection feature.

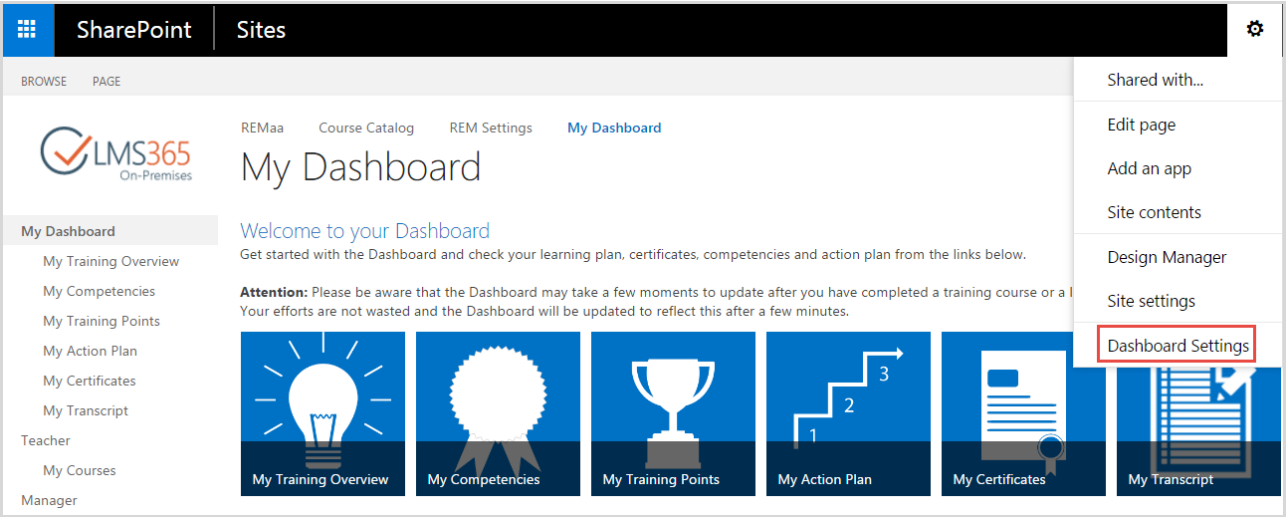
Link to My Dashboard subsite is displayed in the global navigation:



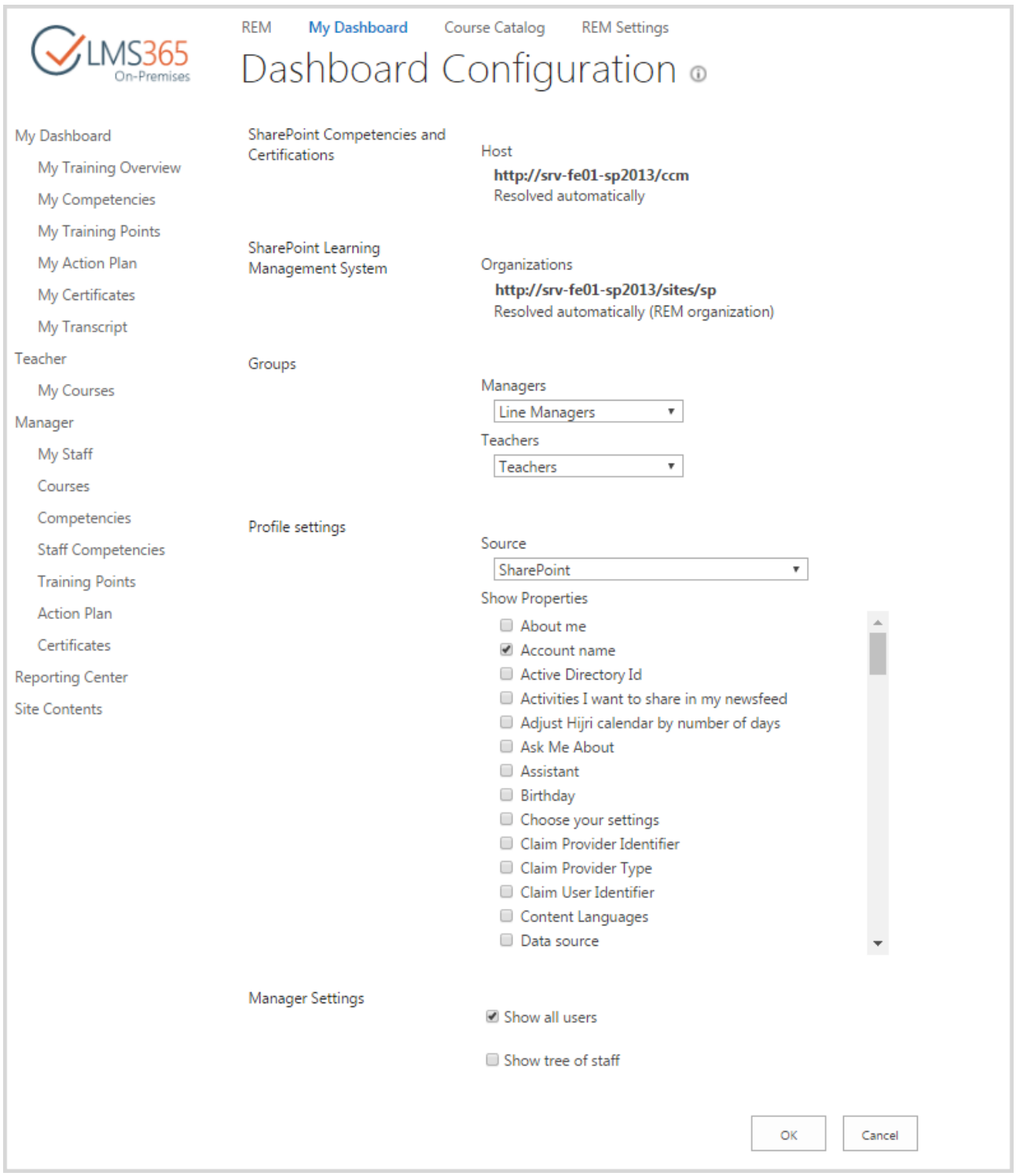
My Dashboard functionality replaces and enhances the old functionality of "My Pages". It provides Learners, Teachers and Administrators with tools for quick overview and management of the learning process. For more detailed information see LMS365 On-Premises 4.8 REM User Guide.

1.1.2 Dashboard Settings

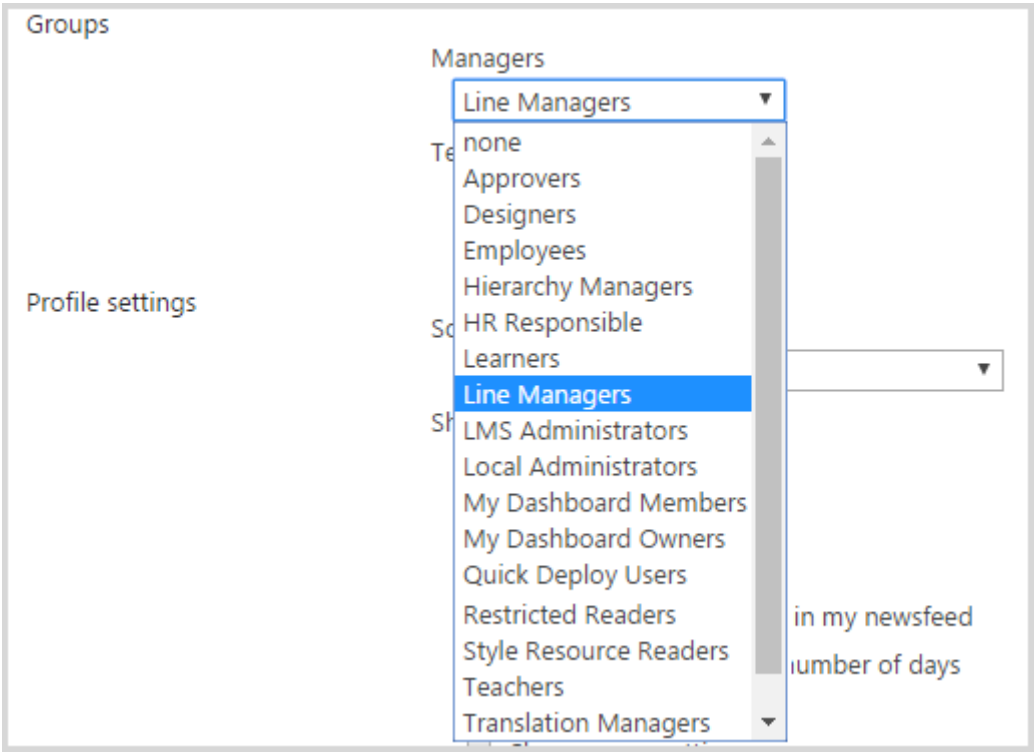
To configure settings of the created Dashboard site, go to My Dashboard > Settings > Dashboard Settings:



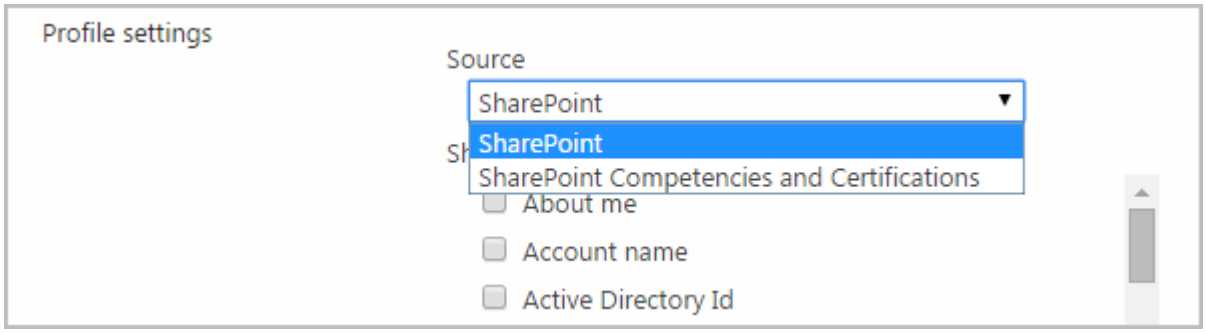
This section displays connections to other ELEARNINGFORCE products and provides the ability to configure Groups, Profile and Manager Settings:



SharePoint Competencies and Certifications Host and SharePoint Learning Management System Organizations are resolved automatically from SharePoint REM host.
Groups section allows assigning Manager and Teacher permissions to any group on the site:



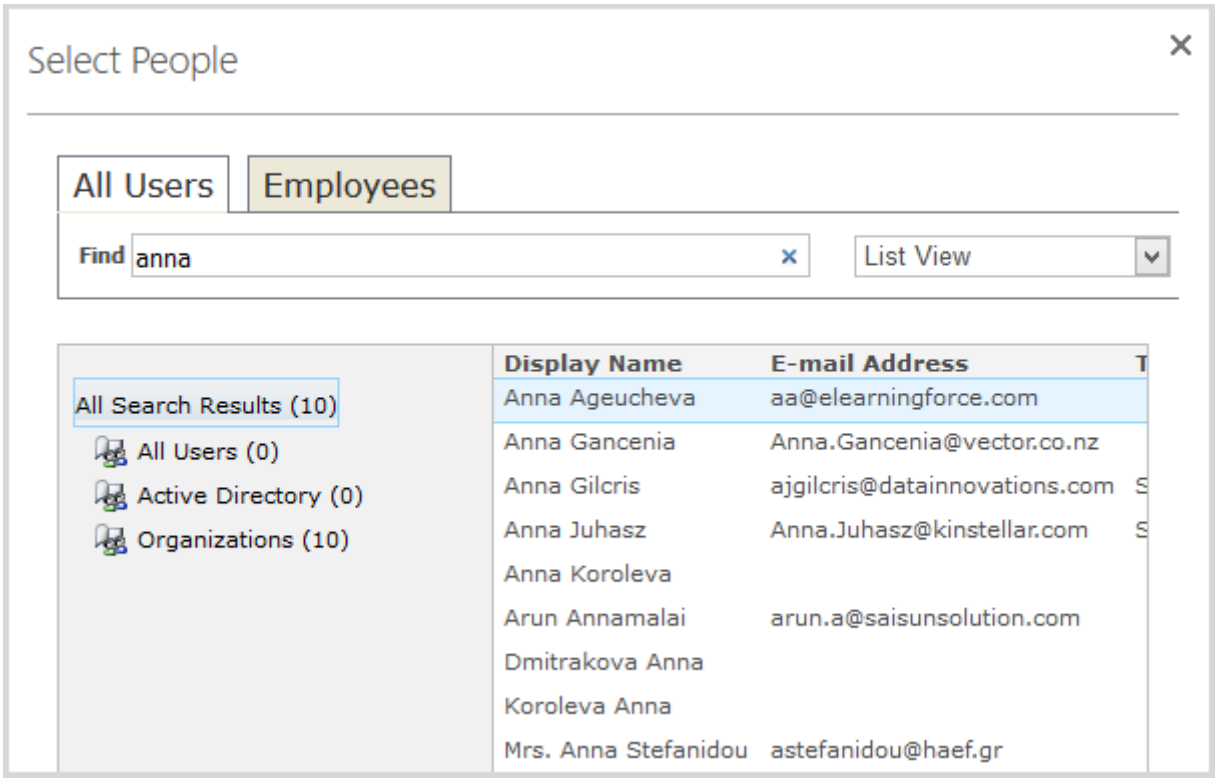
Profile settings include the possibility to take profile information from SharePoint or CCM. To select information for display in Profile select corresponding check boxes:



NOTE:	If SharePoint is chosen – profile details are taken from user's MySite. If there is no MySite – profile details are taken from Dashboard's site collection. If Dashboard's site collection has no user's profile details – profile information will be empty. If CCM is chosen – profile details are taken from CCM host site collection. If there are no profile details – profile information will be empty.

Manager Settings include options "Show all users" and "Show tree of staff":

"Show all users" option adds additional tab 'All Users' to people picker. When this option is enabled, it is possible to search and view not only direct subordinates but all underlying hierarchy:



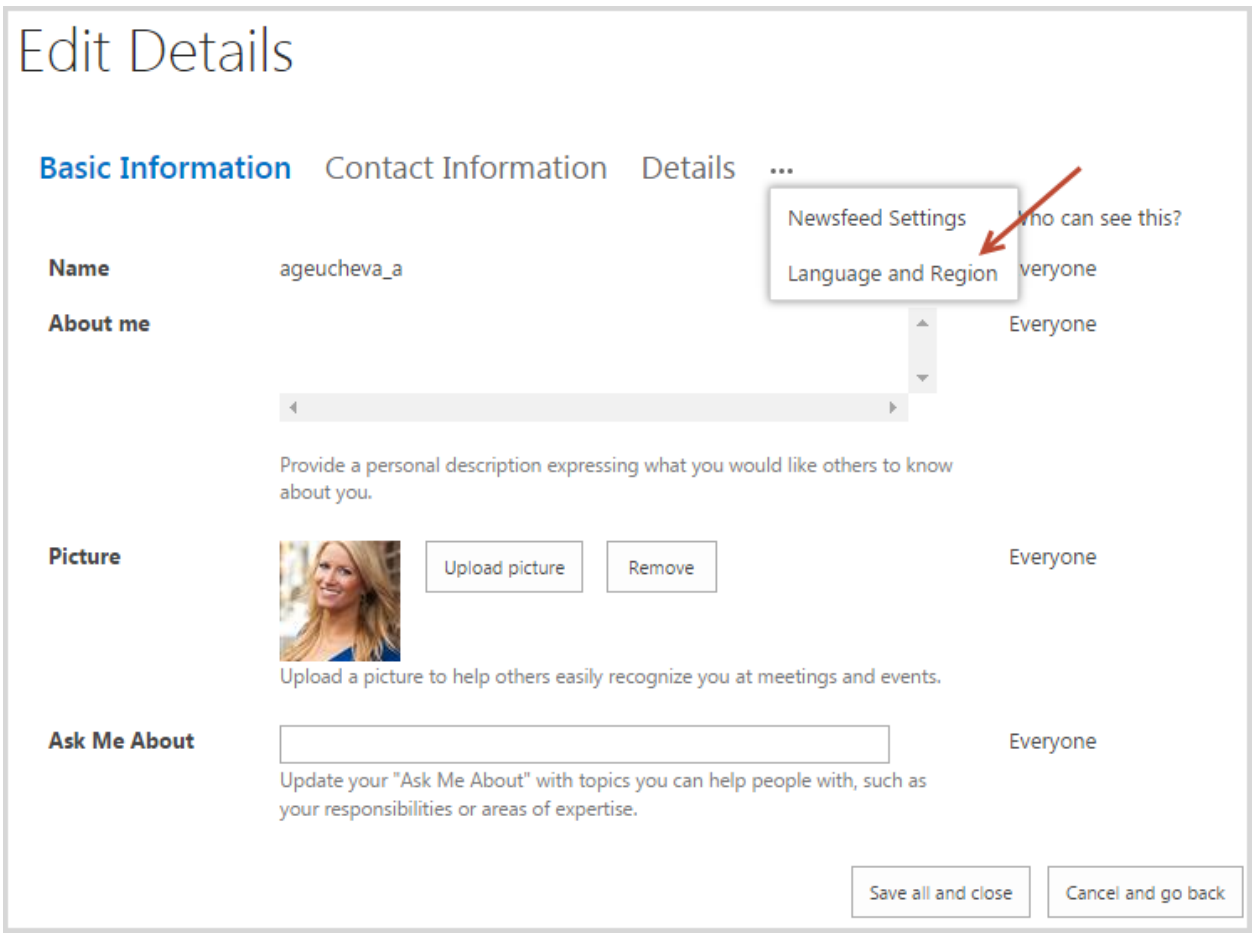
"Show tree of staff" option switches between **Tree view** and **List view** in the 'View My Staff' page of the dashboard manager menu.

1.1.3 Dashboard Multilanguage Functionality

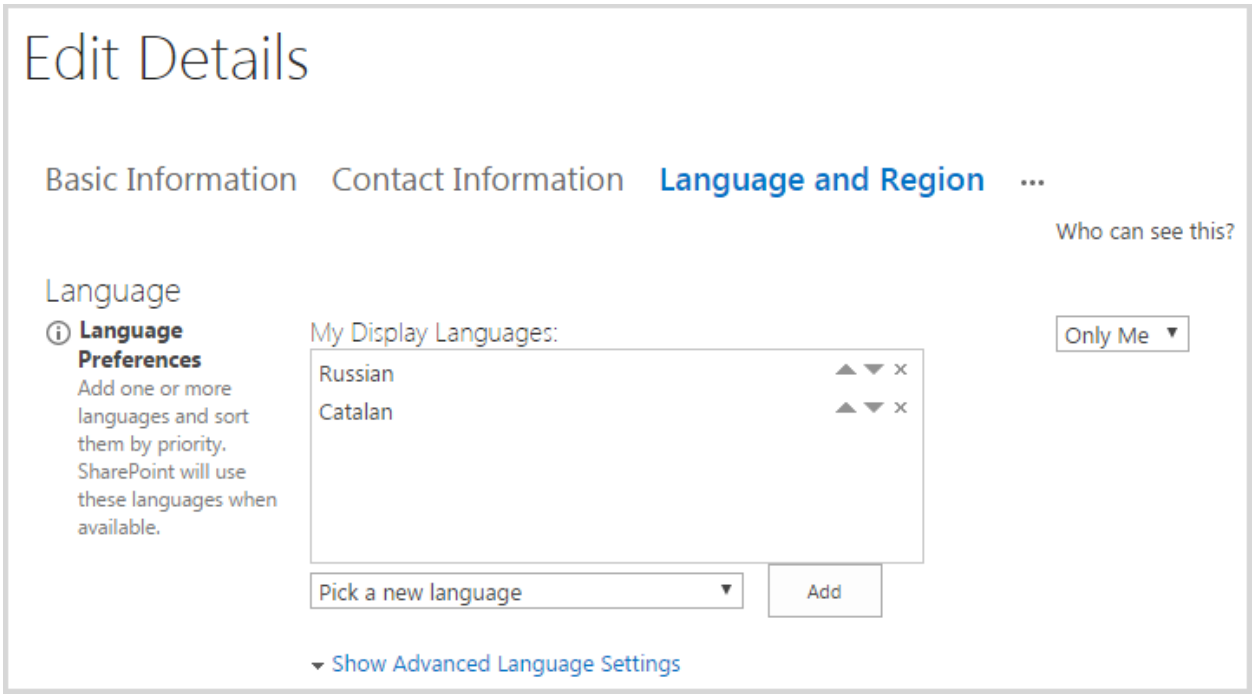
SharePoint Dashboard Multilanguage functionality allows creating websites in different languages and viewing sites in users' preferred language. When the functionality is enabled menu and all pages are translated automatically using user's preferred language.

NOTE:	As a prerequisite for using Multilanguage Functionality, you need to activate ELEARNINGFORCE - Common: Page Redirection site feature.

User's preferred language can be set in user's Profile > Edit >Language and Region:

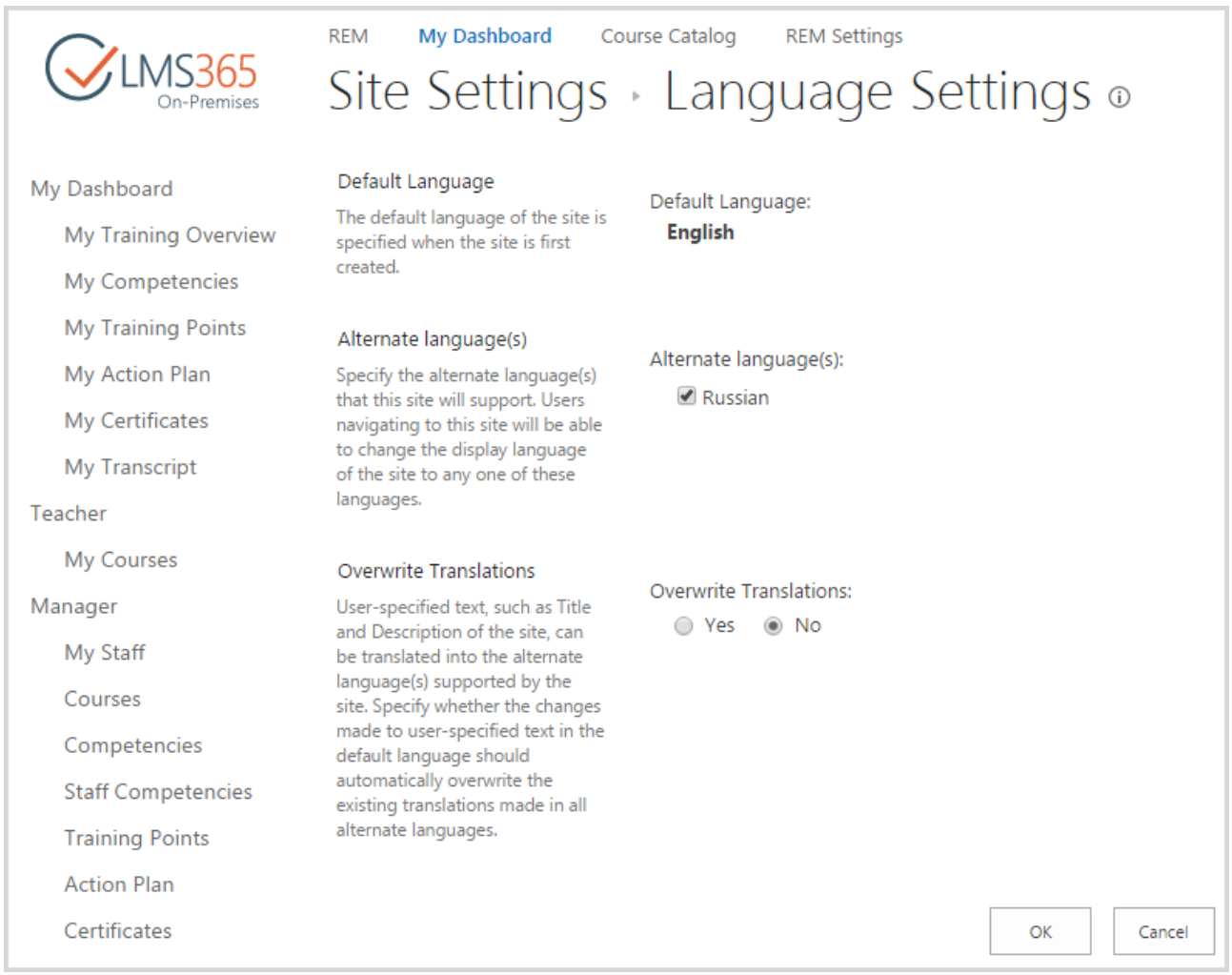

Edit Details
Basic Information
Contact Information
Details
...
Newsfeed Settings
Language and Region
Who can see this?
Name
ageucheva_a
Everyone
About me
Everyone
Provide a personal description expressing what you would like others to know about you.
Picture
Upload picture
Remove
Everyone
Upload a picture to help others easily recognize you at meetings and events.
Ask Me About
Everyone
Update your "Ask Me About" with topics you can help people with, such as your responsibilities or areas of expertise.
Save all and close
Cancel and go back

In the 'Language' section select Display Languages from the drop-down list and sort them by priority:



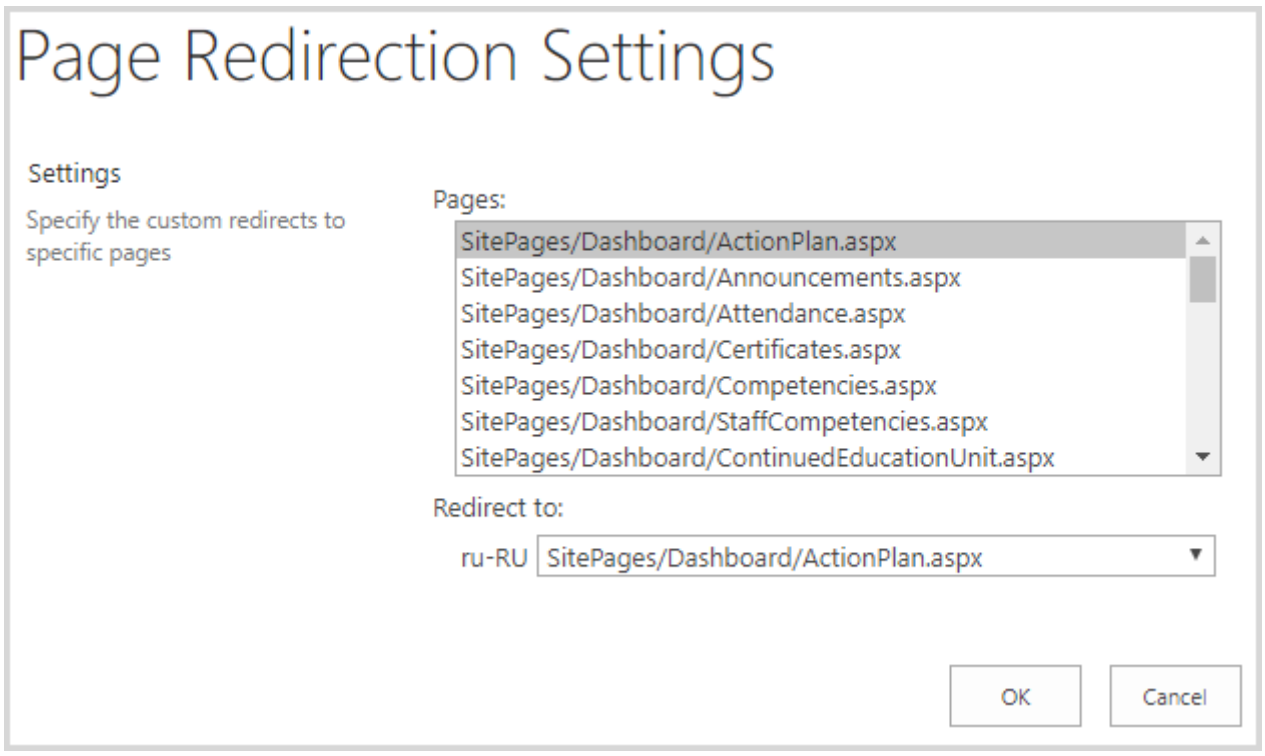
NOTE:	For the use of SharePoint Dashboard Multilanguage functionality language packs in all needed languages should be installed for all Elearningforce products installed on your farm.

To enable the SharePoint Dashboard Multilanguage functionality, go to Site Settings > Site Administration > Language Settings and check boxes next to the Alternate language(s) to be used:



When an alternate language is selected it is possible to set redirection to different pages for different languages. Users with different preferred languages will be redirected to separate pages.

To do that, go to Dashboard Site Settings > Page Redirection Settings section and select redirections for Dashboard pages from the drop-down list of all pages of your Dashboard site:



Page Redirection Settings section is displayed only when "ELEARNINGFORCE - Common: Page Redirection" site feature is activated.

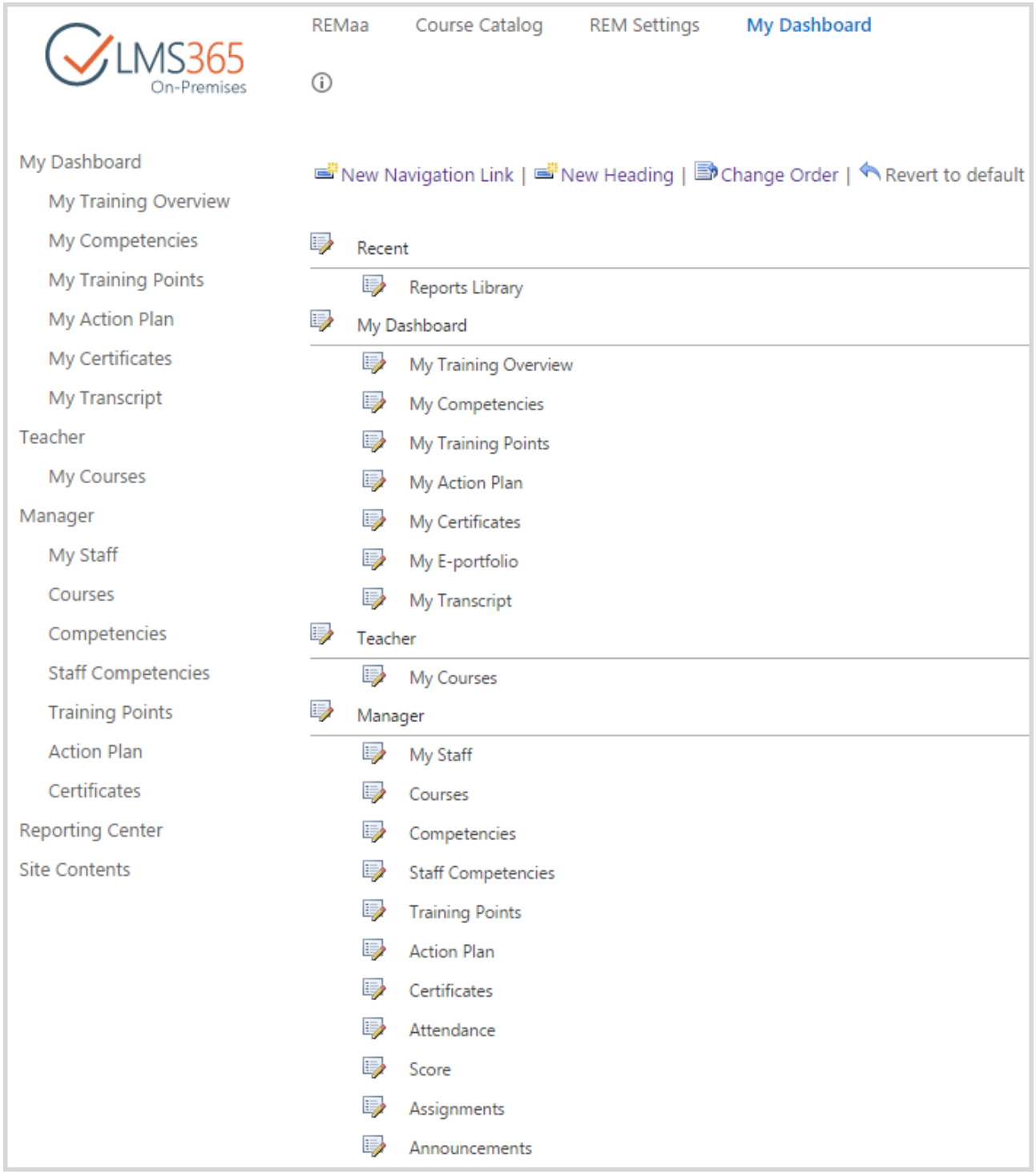
NOTE:	You can have problems with "Quick Launch" menu, as it may depend on older versions of Dashboard. To solve this issue re-activate the hidden feature "Elearningforce_Dashboard_Navigation".

1.1.4 Navigation

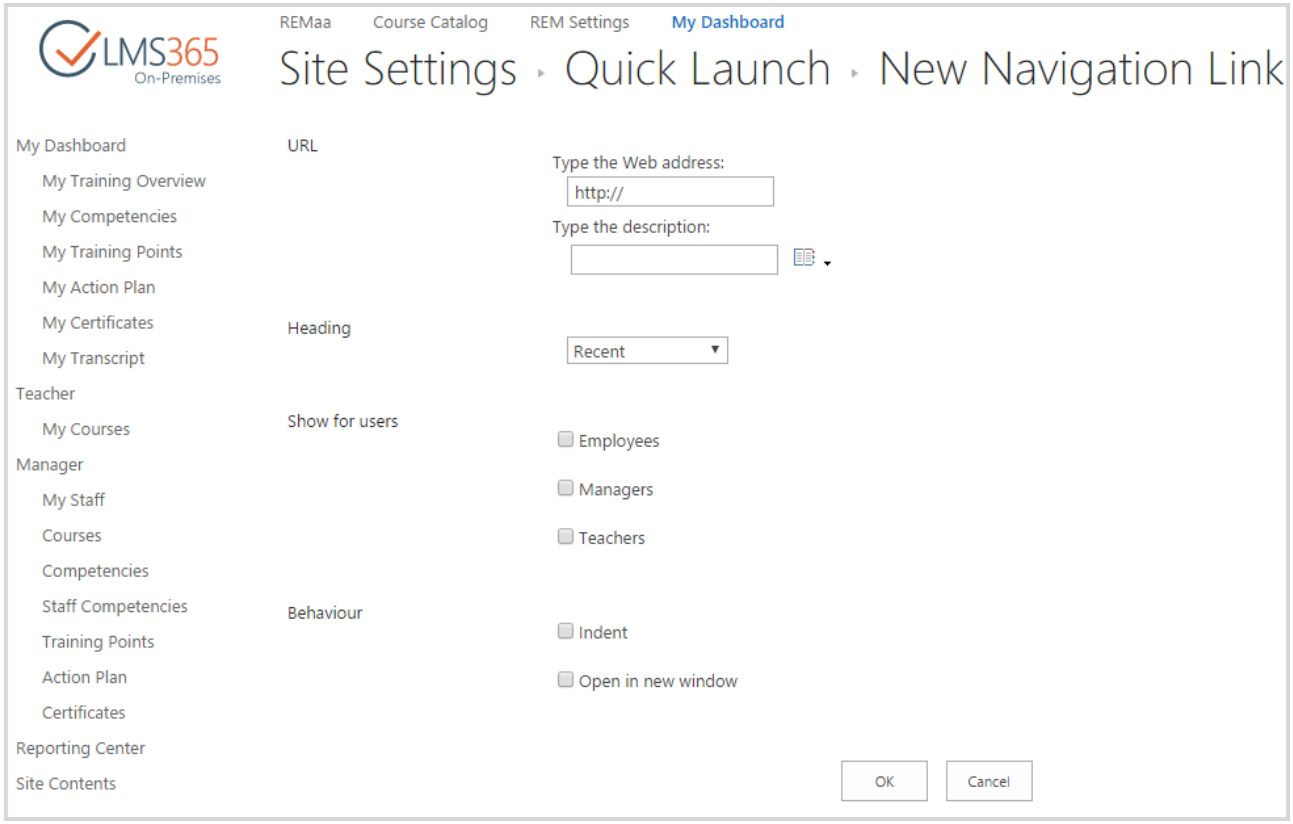
To manage Links on the quick launch do the following:

- Go to Settings > Site Settings;
- Click Navigation in the Look and Feel section.

You can create New Navigation Link, New Heading and Change Order of links on this page:

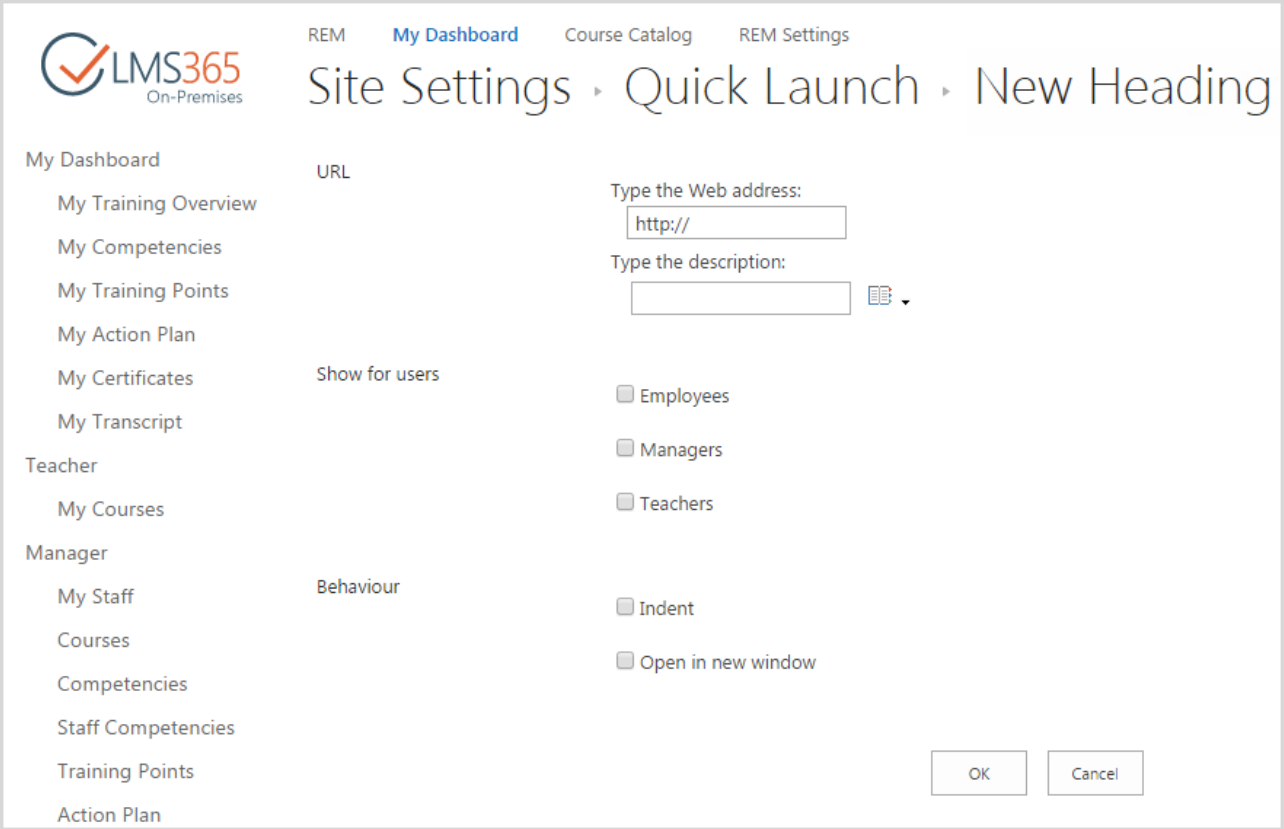

LMS365 On-Premises
REMaa
Course Catalog
REM Settings
My Dashboard
My Dashboard
My Training Overview
My Competencies
My Training Points
My Action Plan
My Certificates
My Transcript
Teacher
My Courses
Manager
My Staff
Courses
Competencies
Staff Competencies
Training Points
Action Plan
Certificates
Reporting Center
Site Contents
New Navigation Link | New Heading | Change Order | Revert to default
Recent
Reports Library
My Dashboard
My Training Overview
My Competencies
My Training Points
My Action Plan
My Certificates
My E-portfolio
My Transcript
Teacher
My Courses
Manager
My Staff
Courses
Competencies
Staff Competencies
Training Points
Action Plan
Certificates
Attendance
Score
Assignments
Announcements

To add New Navigation Link click New Navigation Link button ( ) and fill in the form:



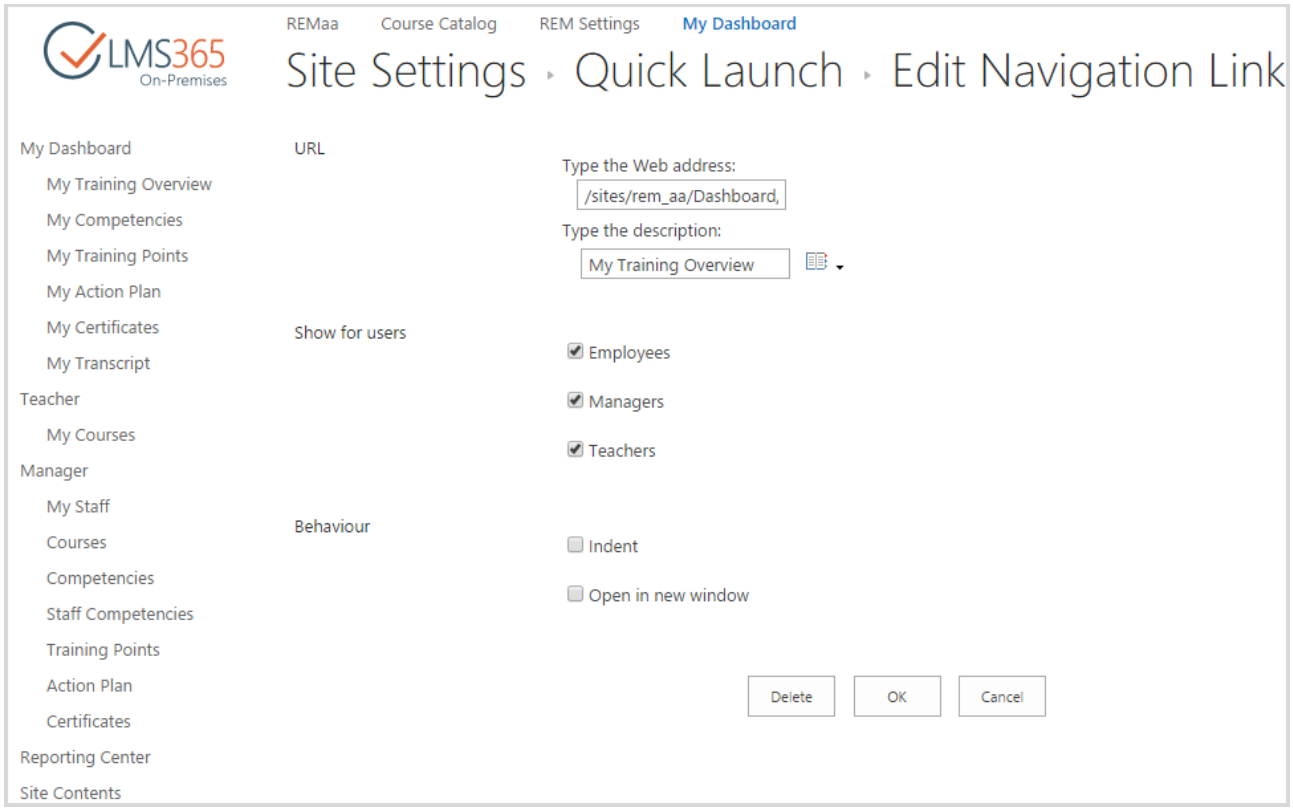
1) Enter the Web address of the new link;
2) Type description of the new link;
3) Choose heading of the link;
4) Select corresponding check boxes to make the link visible for Employees and\or Managers;
5) Select corresponding check boxes to set new link's behavior – display the link with indent and open in new tab;
6) Click OK to save changes or click Cancel to discard changes.

To add New Heading click New Heading button ( ) and fill in the form:



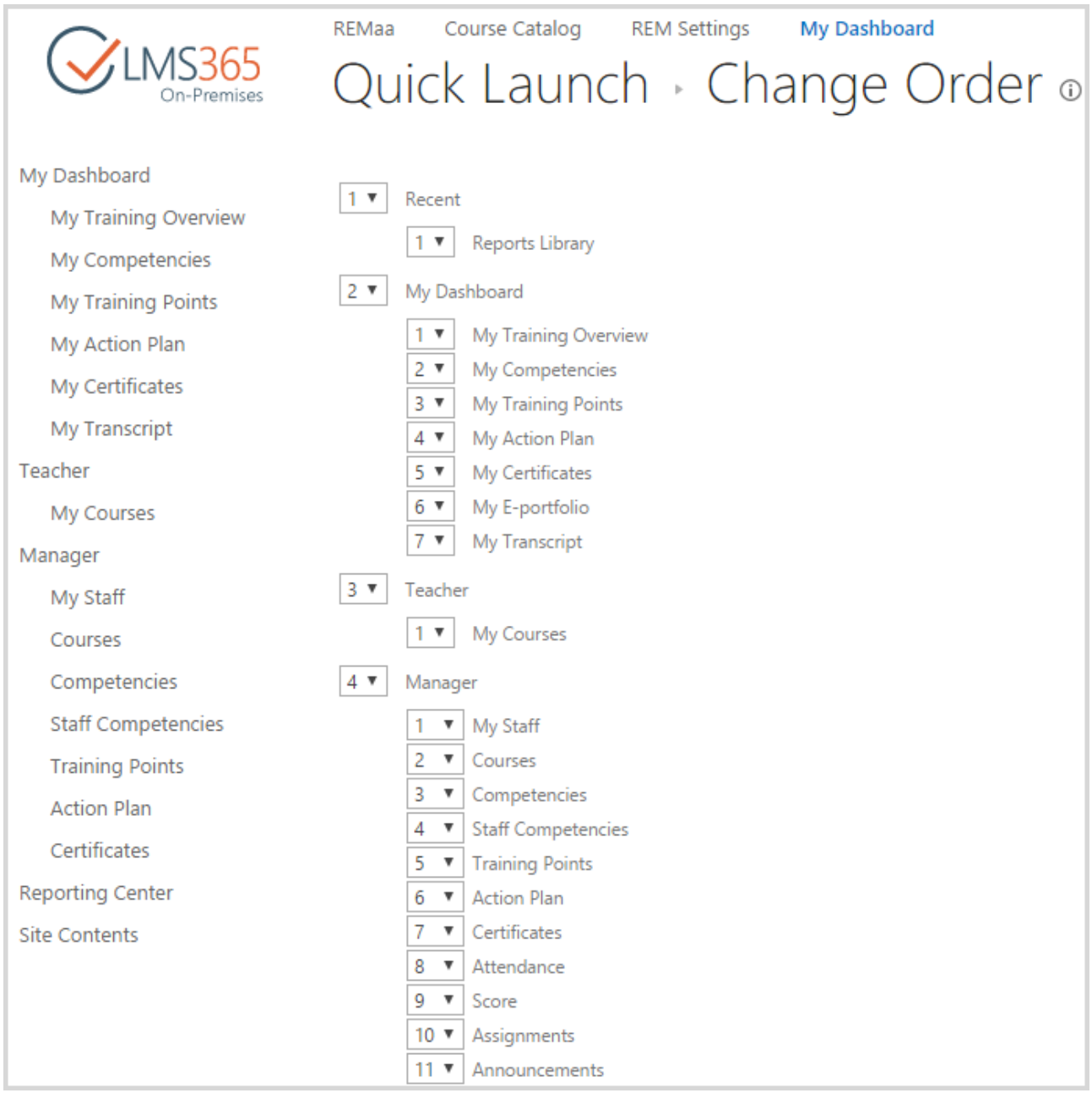
1) Enter the Web address of the new heading;
2) Type description of the new heading;
3) Select corresponding check boxes to make the heading visible for Employees and\or Managers;
4) Select corresponding check boxes to set new heading's behavior – display the heading with indent and open in new tab;
5) Click OK to save changes or click Cancel to discard changes.

To edit link or heading, select an item, click Edit ( ) button next to it and edit settings in the open form:



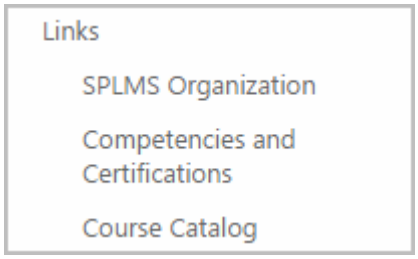
Click OK to save changes, click Cancel to discard changes.

To Change Order click Change Order ( ) button and select new order of links:



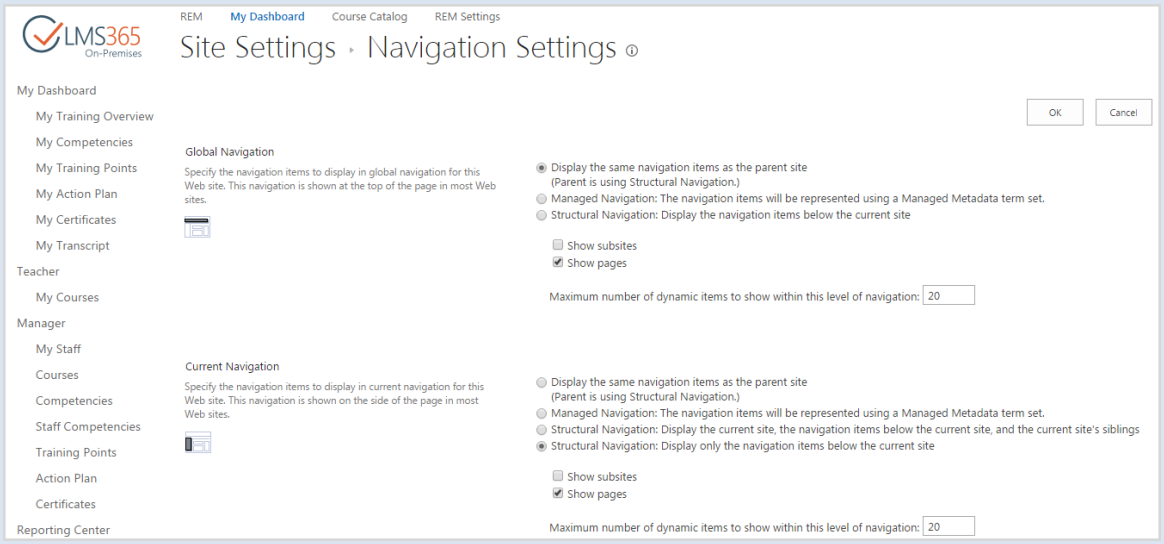
Click OK to save changes or click Cancel to discard changes.

It is possible to specify direct links to other ELEARNINGFORCE Products in the Links menu section. By default these links are disabled:



- *SPLMS Organization* – link to the first SharePoint LMS Organization associated with SharePoint REM;
- *Competencies and Certifications* – link to the Competencies and Certifications module host site;
- *Course Catalog* – link to the Course Catalog from SharePoint REM.

NOTE: To get access to Global and Current Navigation settings use direct link '_layouts/15/AreaNavigationSettings.aspx?force=1'
On this page you can the top link bar and left navigation menu settings:



1.2 REM Host Named Site Collection Creation

Host Named Site Collection is a feature of SharePoint that allows individual site collections to have their own top-level URL. To create a Host Named Site for SharePoint REM, go to REM4Configuration.xml and find the following section at the end of file:

```
<Global>
  <EnableHostNamedSites>false</EnableHostNamedSites>
  <CustomHostNames>customer-one;customer-two</CustomHostNames>
</Global>
```

Set <*EnableHostNamedSites*> element value to true and add the configured supported hosts separated by semicolon to the<*CustomHostNames*> element. Do not include the protocol e.g. http/https.

Example:
<EnableHostNamedSites>true</EnableHostNamedSites>
<CustomHostNames>starcups.sharepointlms.com;fasttrack.sharepointlms.com</CustomHostNames>

This configuration allows you to create the SharePoint REM host named site collection through the Central Administration UI.

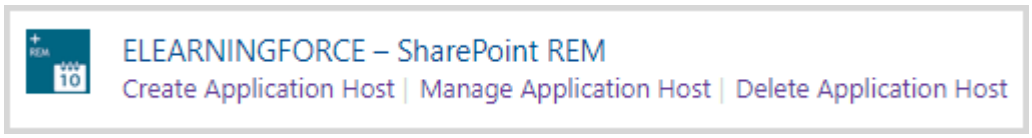
NOTE:	Changes to the REM4Configuration.xml require a manual IISReset before taking effect.

1.3 Manage REM Application Host

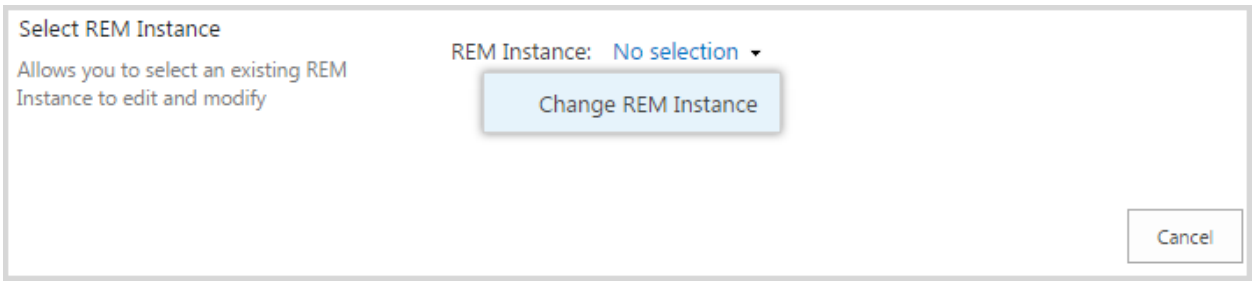
You can manage configurations of existing SharePoint Registration and Enrollment module in two ways.

1.3.1 General Steps

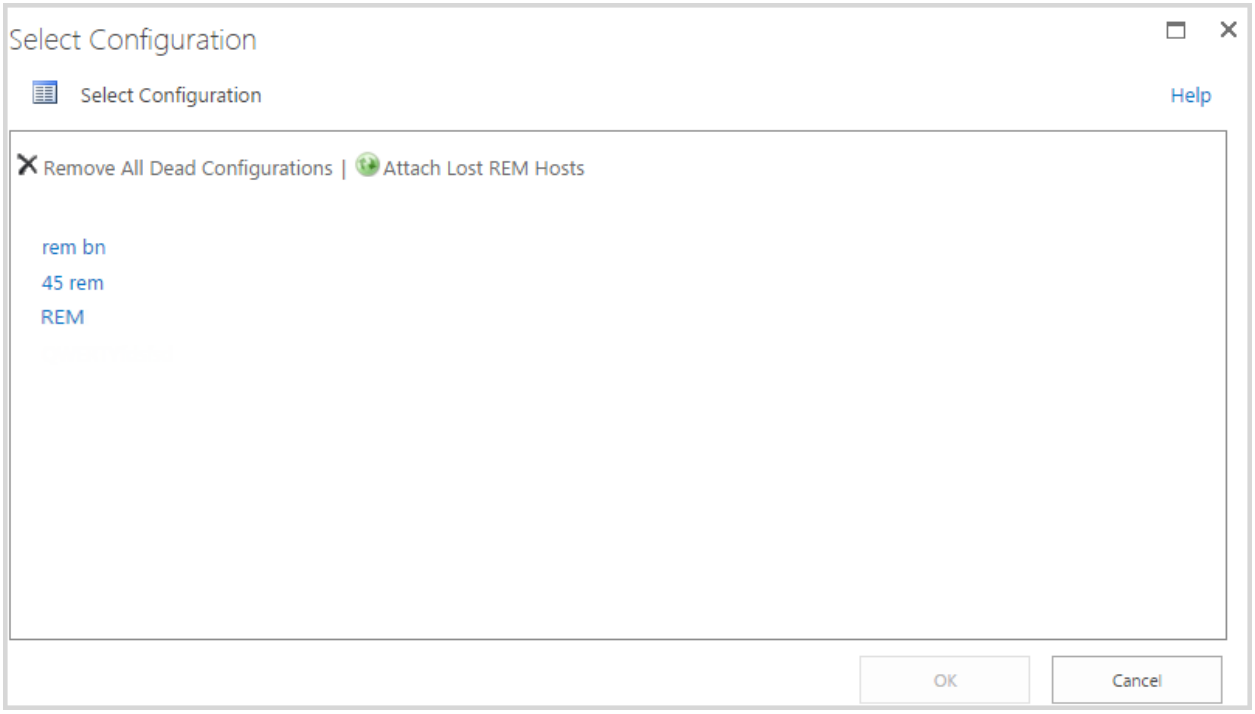
1. Go to Central Administration > Application Management > Manage Application Host:



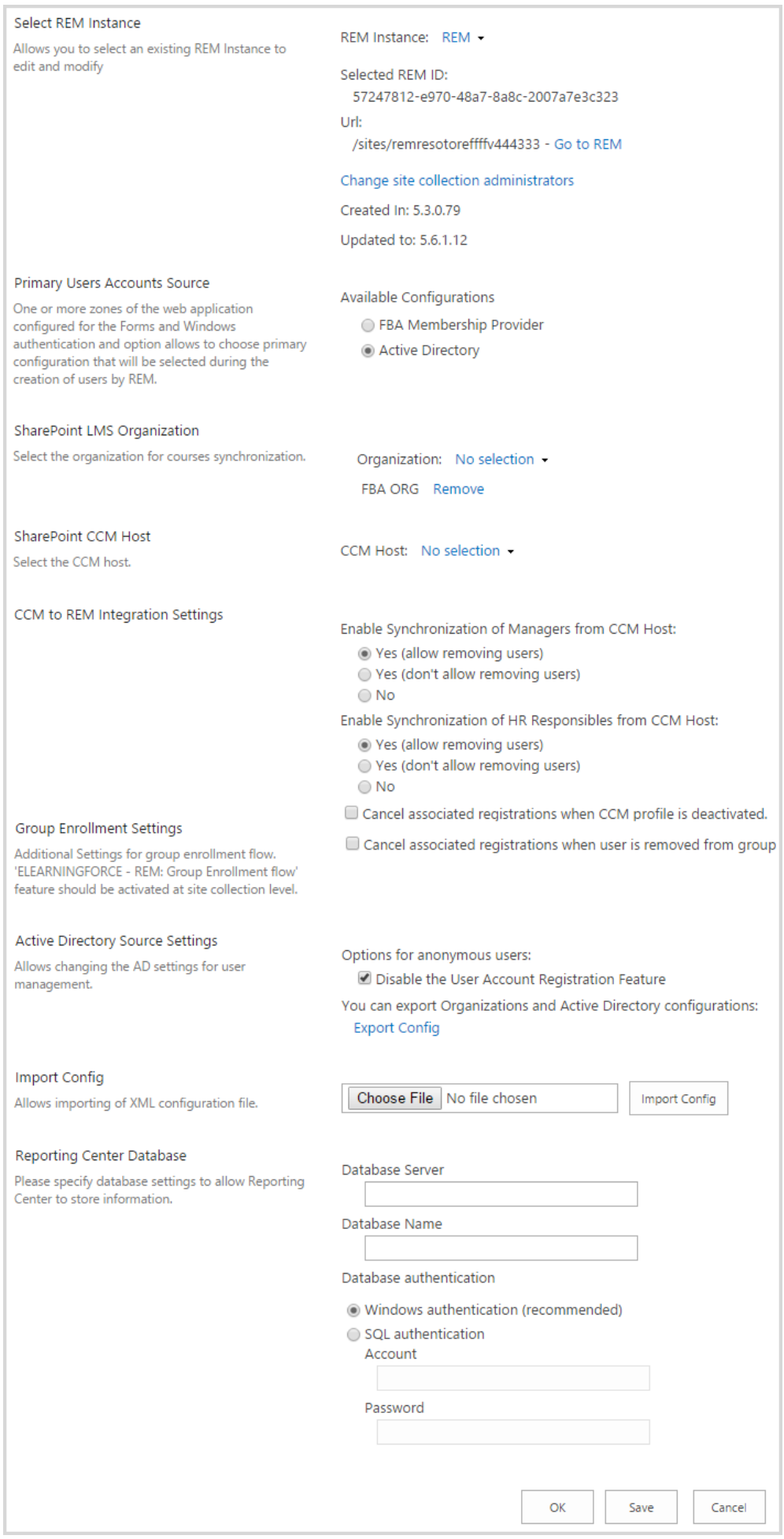
2. In the Select REM Instance section, click Change REM Instance to select a particular module configuration:



In the open dialog box, you may see the configurations called Dead. That means that somebody deleted REM Site Collection without using the Delete REM Site Collection link. You can remove all dead configurations by clicking Remove All Dead Configurations. This button becomes visible, when dead configurations exist:



3. In the open dialog box, select a REM Instance, and then click OK. The following sections will appear: Organization, CCM Host, CCM to REM Synchronization Settings, Active Directory Source Settings, Import Config, and Reporting Center Database:


Select REM Instance
Allows you to select an existing REM Instance to edit and modify
REM Instance: REM
Selected REM ID:
57247812-e970-48a7-8a8c-2007a7e3c323
Url:
/sites/remresotorefffv444333 - Go to REM
Change site collection administrators
Created In: 5.3.0.79
Updated to: 5.6.1.12
Primary Users Accounts Source
One or more zones of the web application configured for the Forms and Windows authentication and option allows to choose primary configuration that will be selected during the creation of users by REM.
Available Configurations
FBA Membership Provider
Active Directory
SharePoint LMS Organization
Select the organization for courses synchronization.
Organization: No selection
FBA ORG Remove
SharePoint CCM Host
Select the CCM host.
CCM Host: No selection
CCM to REM Integration Settings
Enable Synchronization of Managers from CCM Host:
Yes (allow removing users)
Yes (don't allow removing users)
No
Enable Synchronization of HR Responsibles from CCM Host:
Yes (allow removing users)
Yes (don't allow removing users)
No
Cancel associated registrations when CCM profile is deactivated.
Group Enrollment Settings
Additional Settings for group enrollment flow. 'ELEARNINGFORCE - REM: Group Enrollment flow' feature should be activated at site collection level.
Cancel associated registrations when user is removed from group
Active Directory Source Settings
Allows changing the AD settings for user management.
Options for anonymous users:
Disable the User Account Registration Feature
You can export Organizations and Active Directory configurations:
Export Config
Import Config
Allows importing of XML configuration file.
Choose File No file chosen
Import Config
Reporting Center Database
Please specify database settings to allow Reporting Center to store information.
Database Server
Database Name
Database authentication
Windows authentication (recommended)
SQL authentication
Account
Password
OK
Save
Cancel

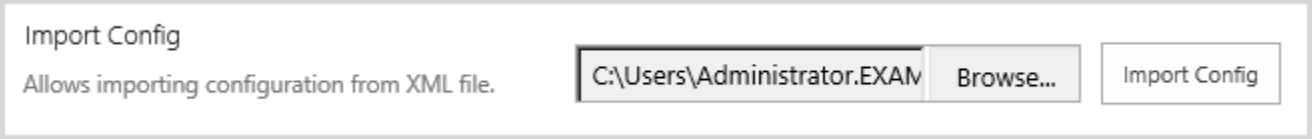
You can edit the Organization field as described above.

4. Click Save to save changes of current configuration. Click OK to save changes and be redirected to the Application Management page.

1.3.2 Additional Steps

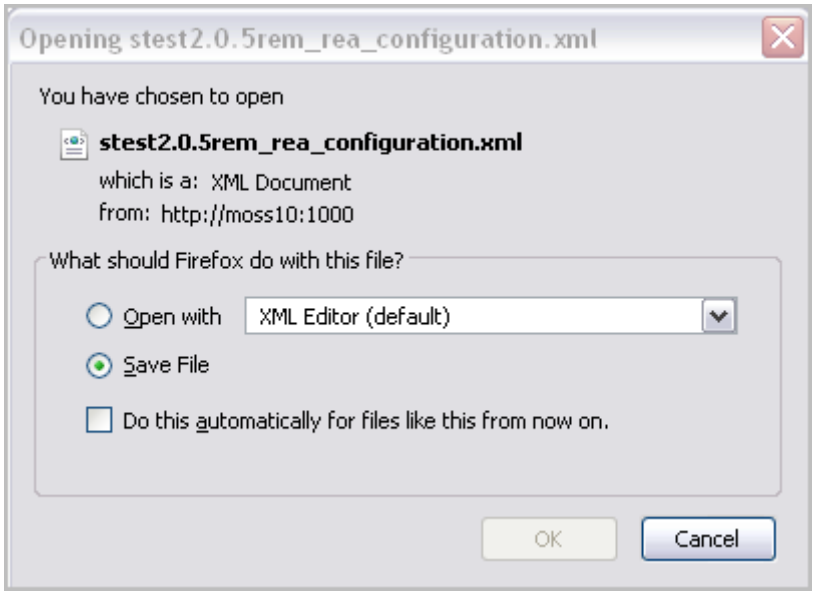
You can edit Active Directory Source Settings as described above or import the saved configuration from XML file in the Import Config section, following steps below:

1. Click Browse and select an XML file;
2. Click Import Config to import the configuration to Organization and Active Directory Source Settings sections:



3. Click Save to save changes of current configuration. Click OK to save changes and be redirected to the Application Management page.

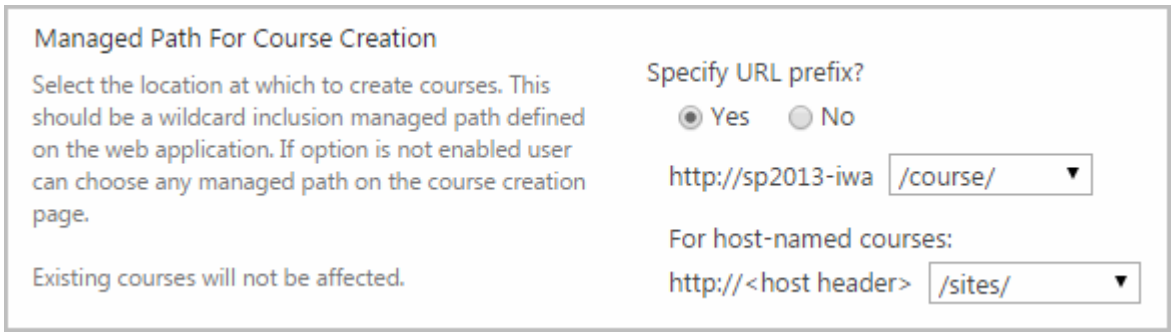
If you want to export configuration of Organization or Active Directory Source Settings sections to XML file, click Export Config. Select Save File to save it to your local computer:



1.3.3 Setting Managed Path for Course Creation

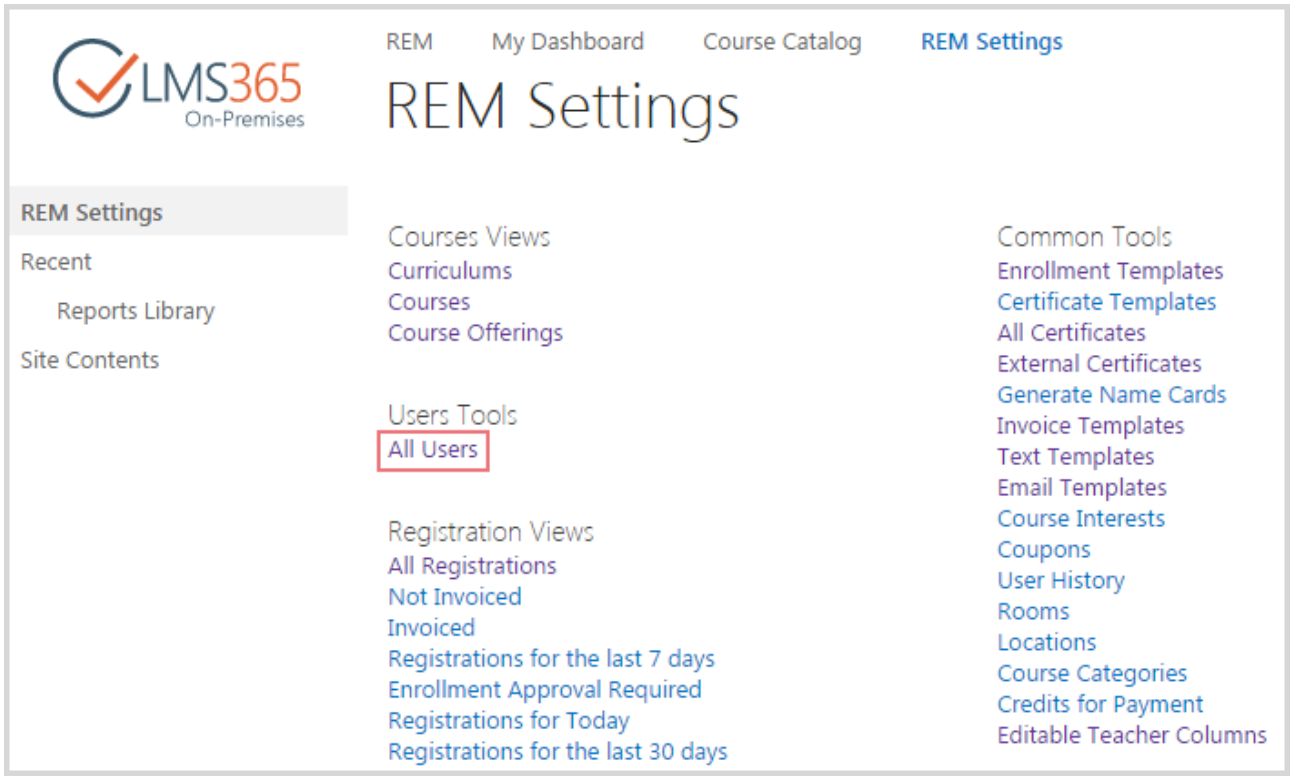
It is possible to configure URL prefix for creation of new courses, so that all new courses will be created using the specified managed path. To set it go to Central Administration > Application

Management > SharePoint LMS > Global Features > Managed Path for Course Creation and enable the option selecting 'Yes' radio button. Then select from the dropdown lists prefixes to be assigned to all newly created courses:



1.4 User Tools Management

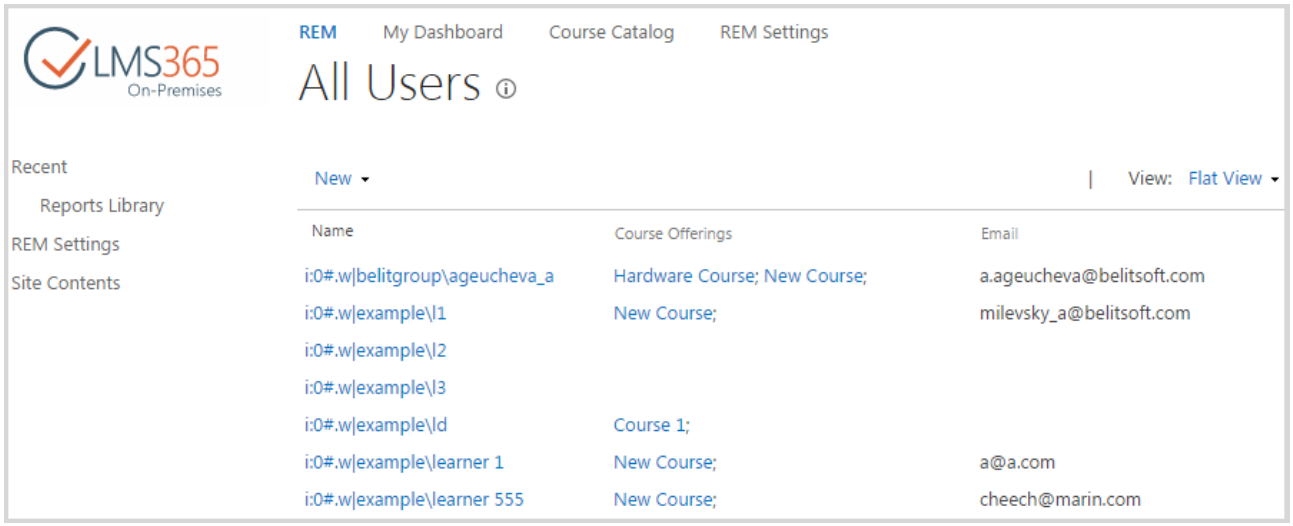
The Users Tools action allows viewing user details, adding new users, enrolling users in courses and deleting them:



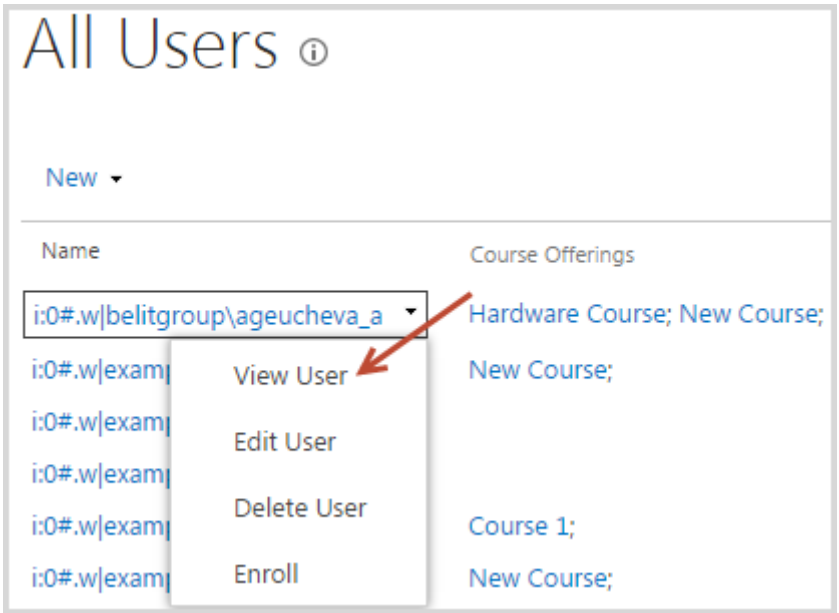
NOTE:	SharePoint REM Users can be managed from the All Users section. Especially it applies to deleting users. For example, after a SharePoint REM user is deleted from a site collection by standard SharePoint scenario (*Settings* > *Site Settings* > *Users & Permissions: People & Groups)*, all registration items remain. This leads to the following: – If you try to delete the registration items of deleted users, these users will not be deleted from the Learners group of LMS Course automatically;

– All processes with registration items of deleted users may perform incorrectly.

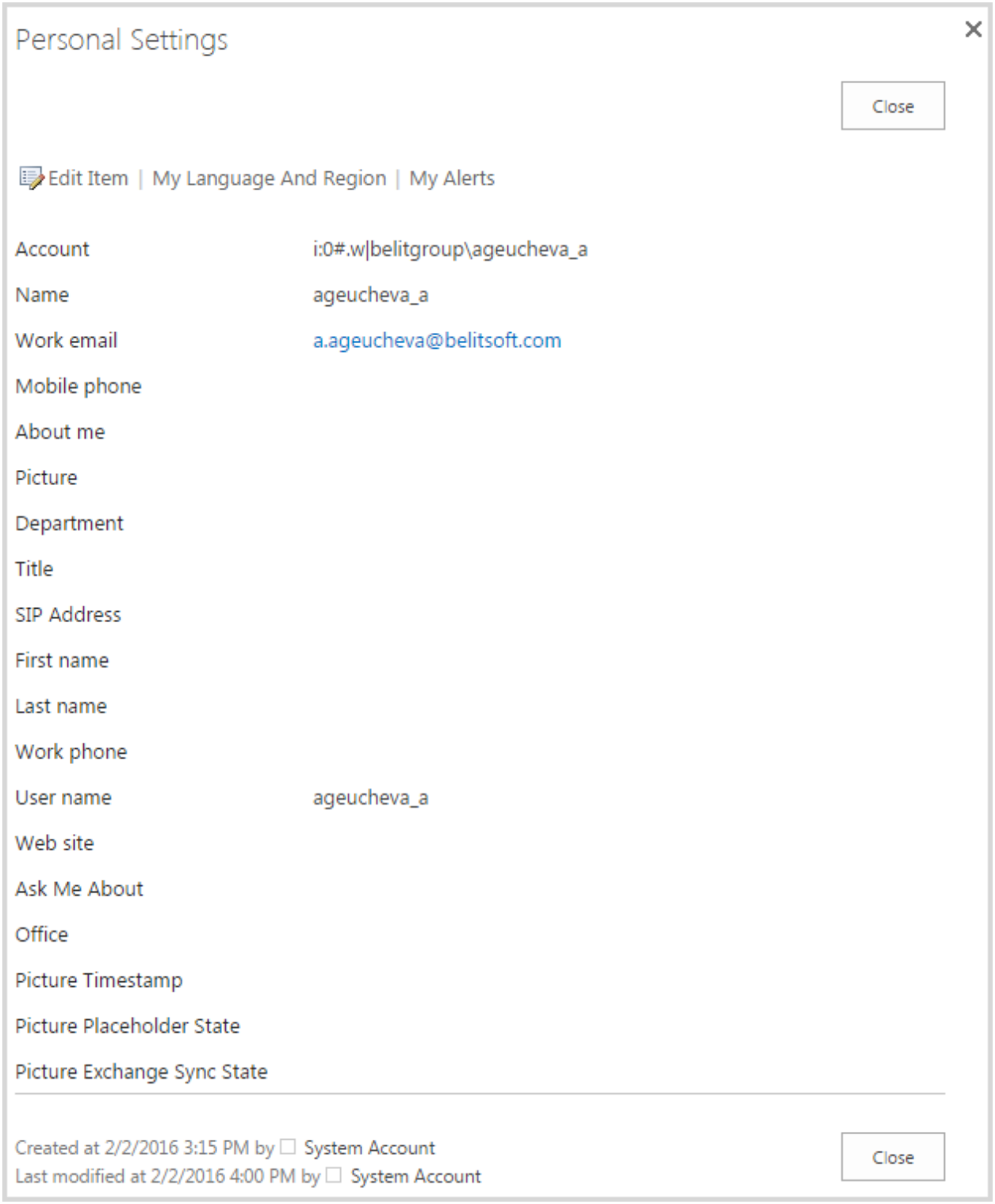
1. Choose All Users link from on the REM Settings page to open the list of current site collection users which have Learners roles:



2. To view the user details click the drop-down arrow next to the needed user name and select View User:



3. The following window will open:



4. Use the Edit Item and Delete User from Site Collection buttons to perform the corresponding actions.

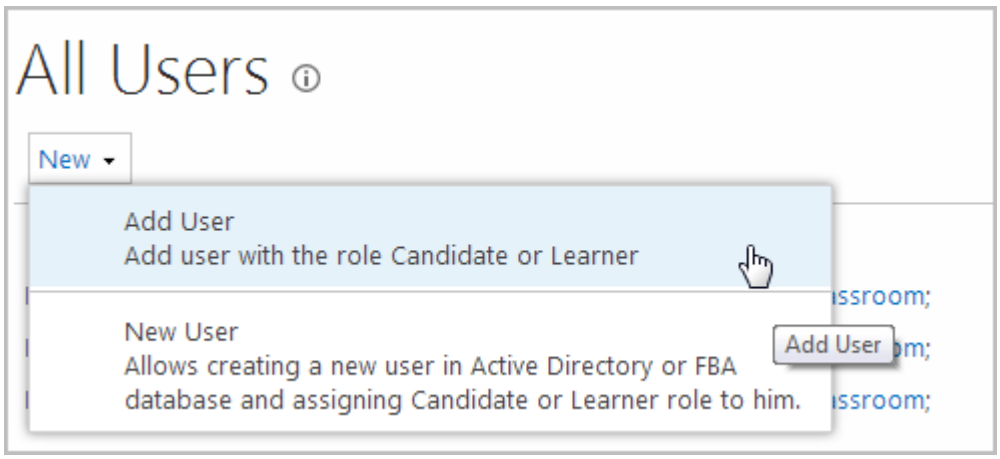
1.4.1 Adding Users

It is possible to add to SharePoint REM users that already exist in AD and add new users.

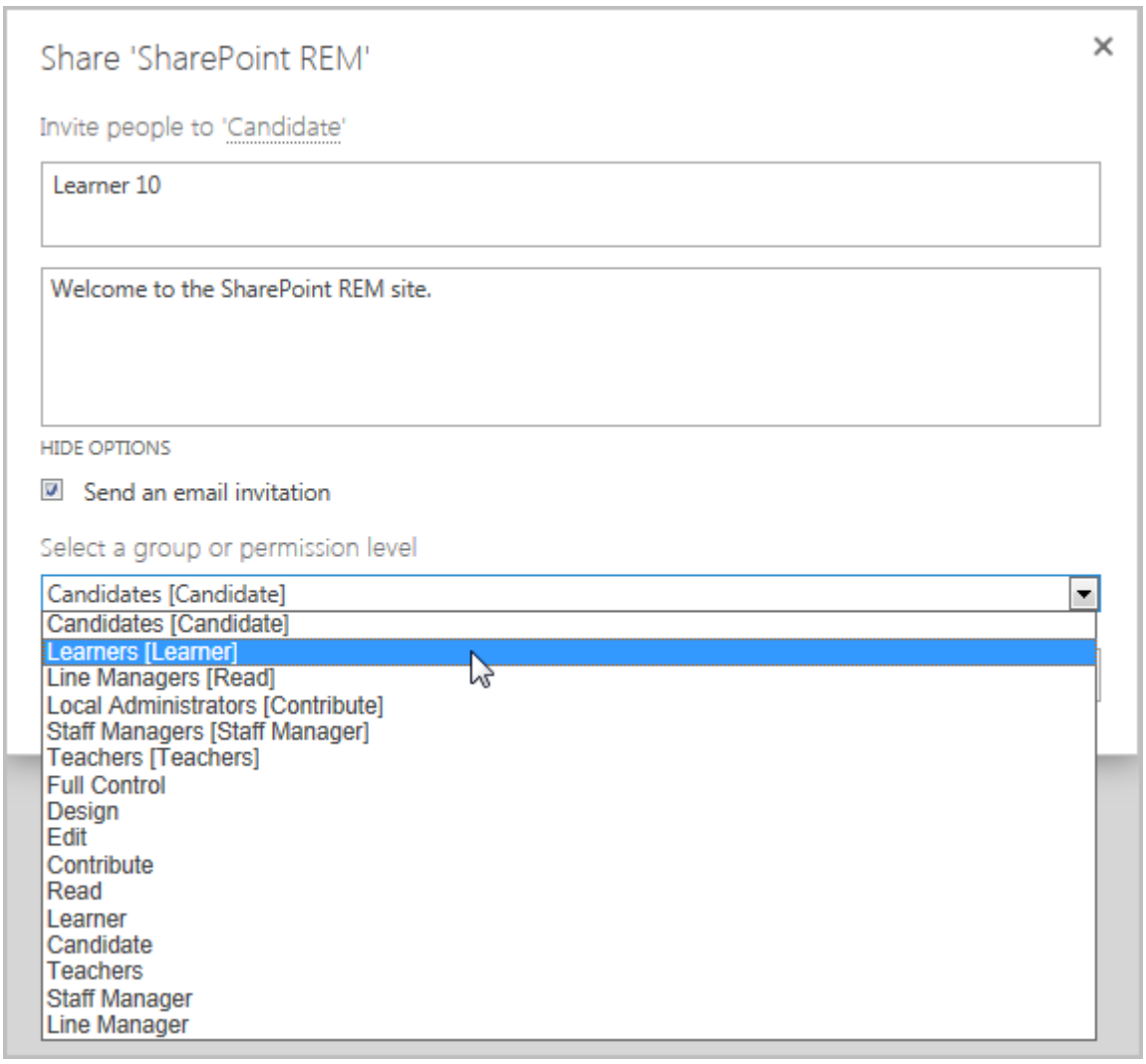
1.4.1.1 Adding Existing Users

To add a user who already activated in AD, do the following:

1. Go to the All Users section;
2. Click New > Add User:



3. Complete the open form:
   - *Invite people* – select the users or groups that you want to add to the site;
   - *Send an email invitation* – allows sending welcoming email to the newly added users. When selected, field for email is activated;
   - *Select a group or permission level* – select a SharePoint group to add user or grant users permission directly.



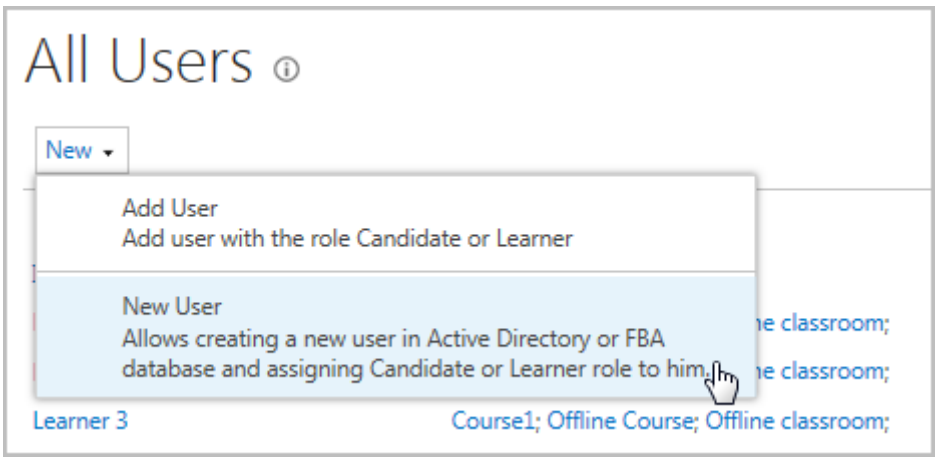
4. Click Share to add the user(s) to the All Users list.

1.4.1.2 Adding New Users

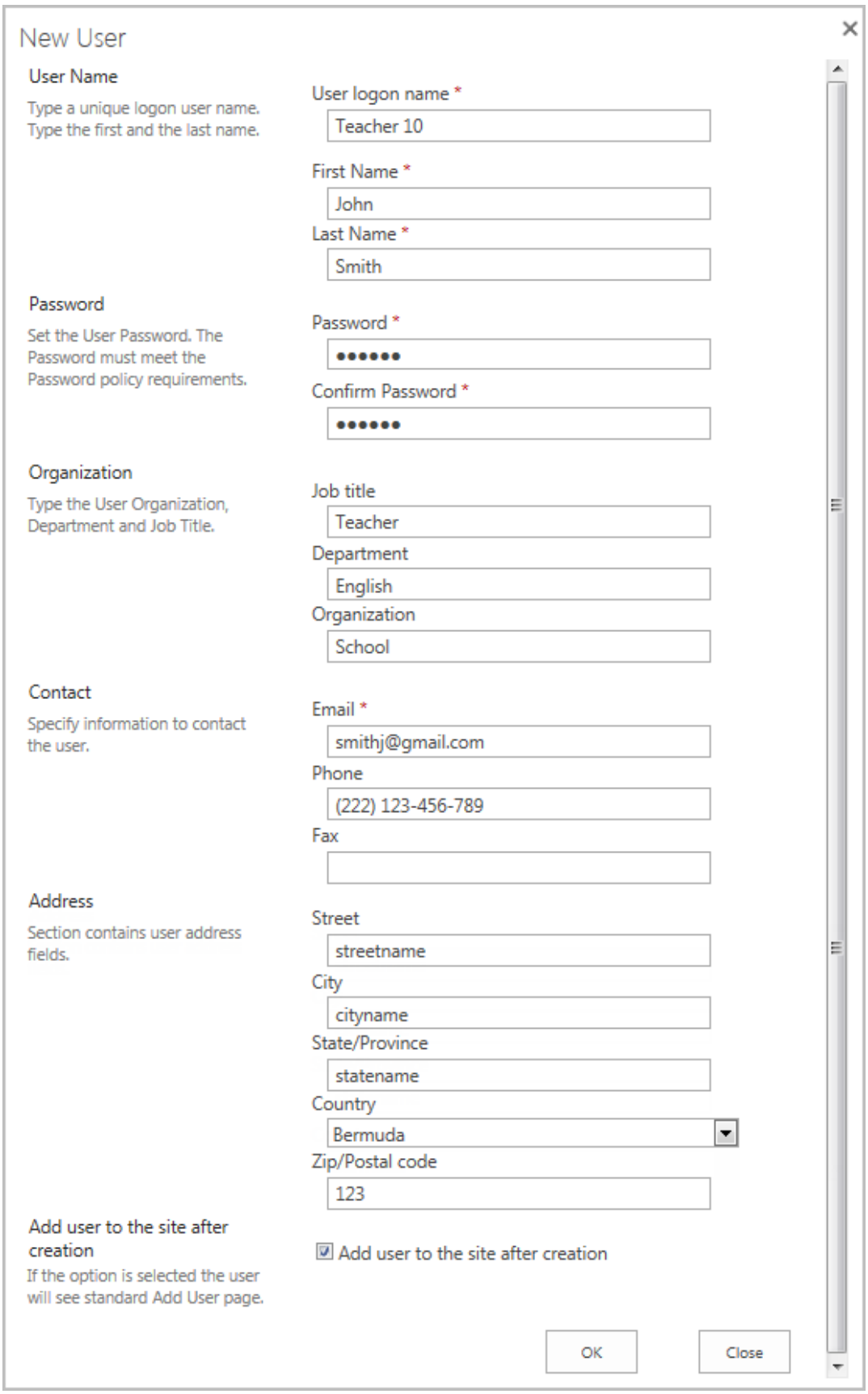
NOTE:	This option is only possible if during the site collection creation you cleared the 'Don't use users registration part' check box (for details, see chapter *SharePoint REM Site Collection Creation* in "*SharePoint REM Installation Guide*"). If the check box was selected, you can only add the existing users.

To create a new user and then add him to SharePoint REM, do the following:

1. Go to the All Users section;
2. Click New > New User:

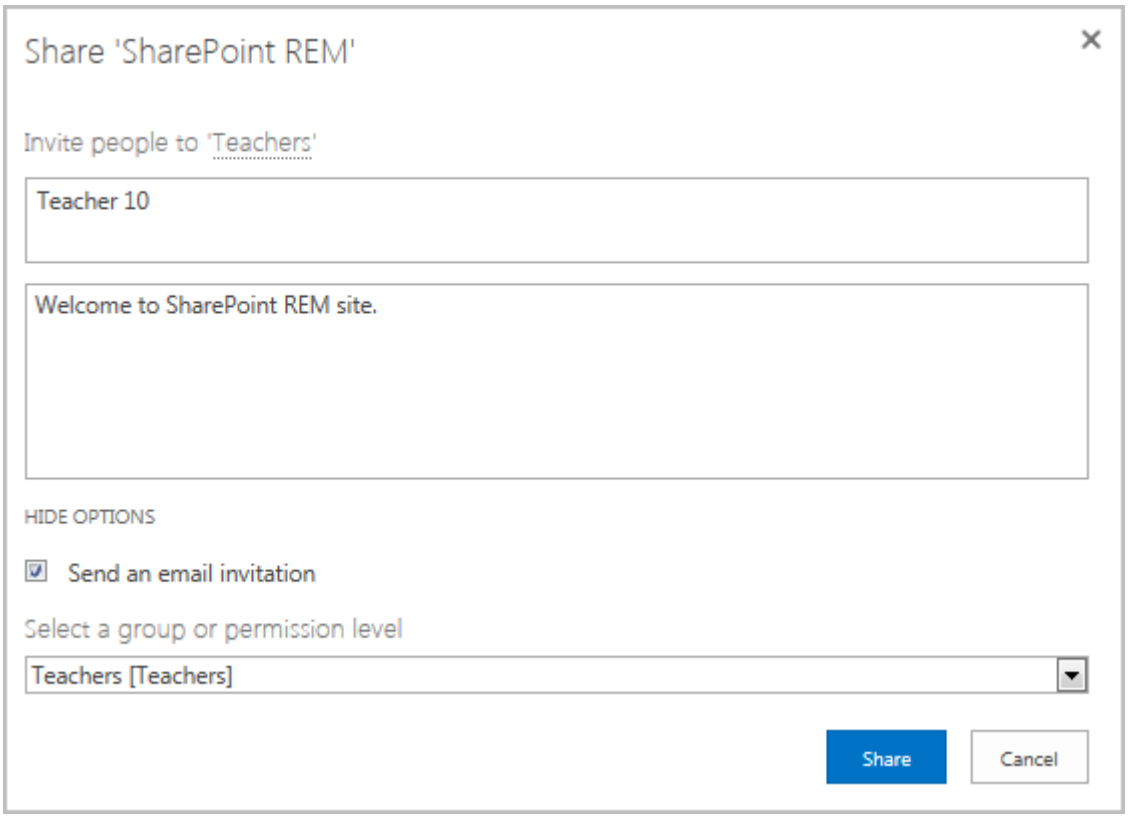


3. Complete the open form (the fields marked with asterisk (*) are required). Values of all fields are the same as in AD:



4. To add a newly created user to the site, select the Add user to the site after creation check box. If the box is unchecked, the user will only be added to AD, not to SharePoint REM and you will need to add him later as an existing user;

5. Click OK. If you have selected the Add user to the site after creation check box, continue with the steps below. If cleared – the user will be added to AD and the form will close;
6. Complete the open form:



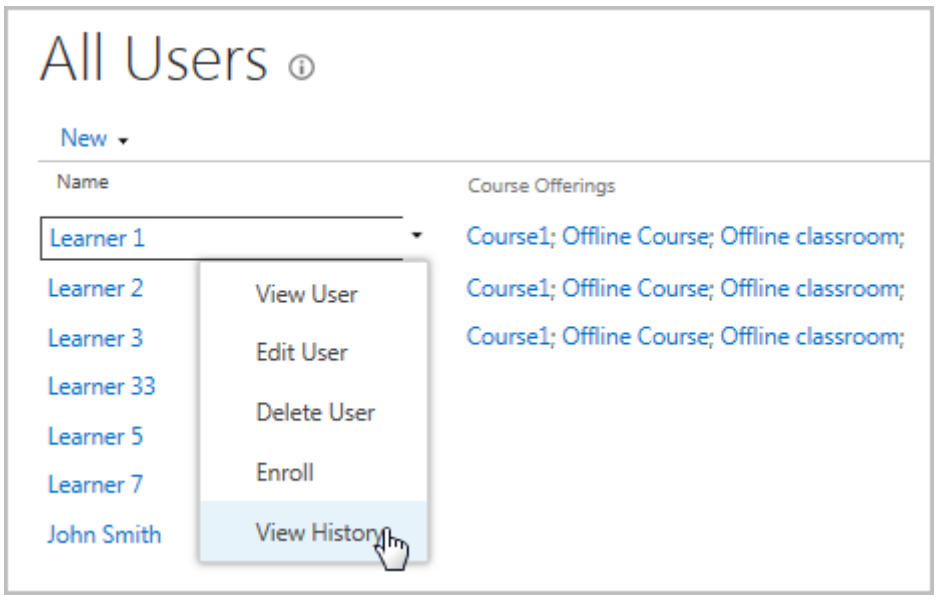
- *Invite people* – select the users or groups that you want to add to the site;
- *Send an email invitation* – allows sending welcoming email to the newly added users. When selected, field for email is activated;
- *Select a group or permission level* – select a SharePoint group to add user or grant users permission directly.

7. Click Share to add the user to the All Users list.

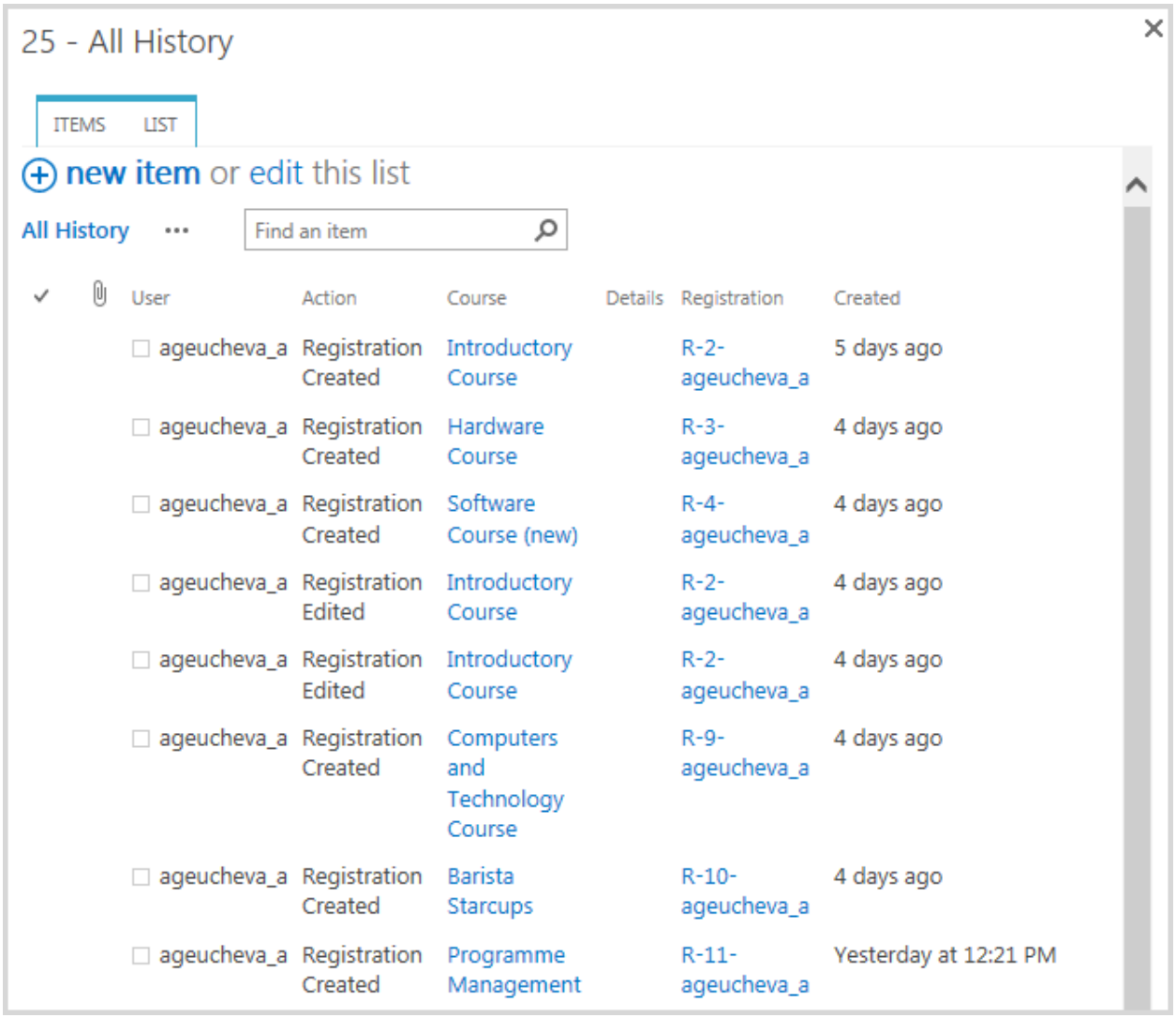
1.4.2 Viewing User Courses History

To view user's courses history, do the following:

1. Go to the All Users section;
2. Click the drop-down arrow next to the needed user and select View History:



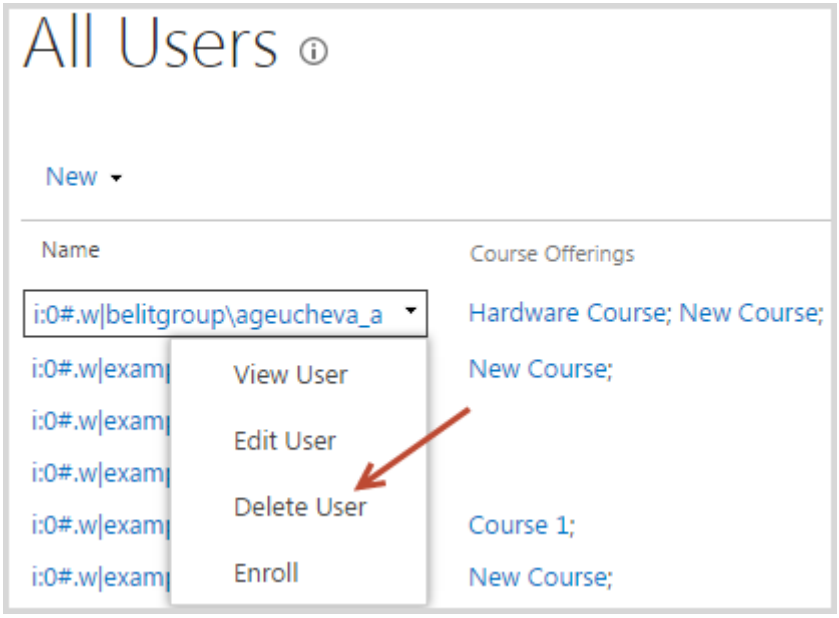
3. The page will open containing a list of user's registrations and their versions (every time you make any change, a new registration version is created). The Registration field contains links to the pages where the current registration version is compared to the previous one:



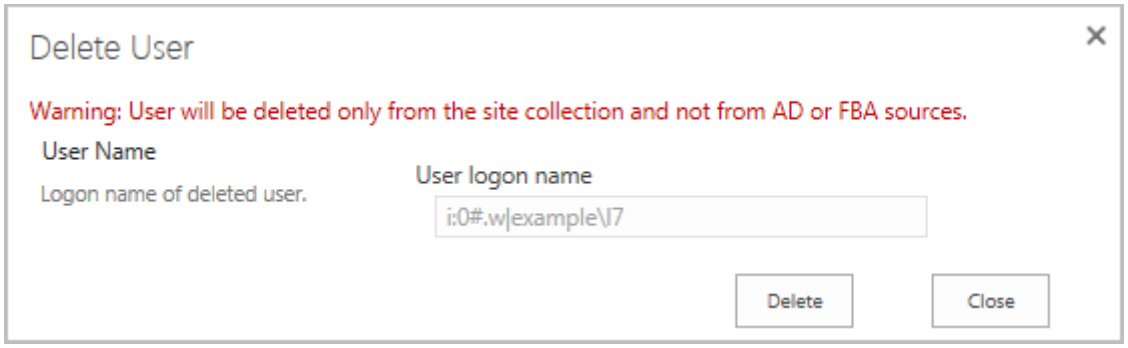
1.4.3 Deleting Users

To delete a user from the All Users list, do the following:

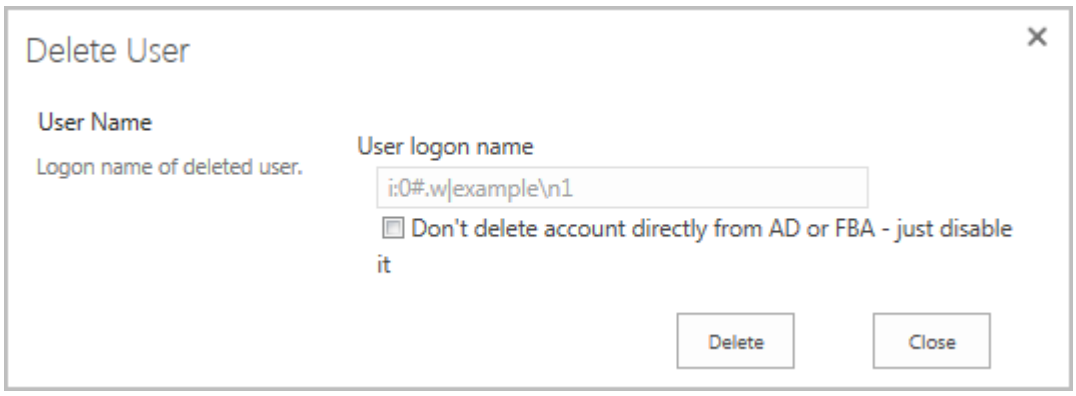
1. Click drop-down arrow next to the user you want to delete and select Delete User:



a) If the user was added to the site from AD or FBA (for details, see chapter 18.1.1 Adding Existing Users for details), the following dialog box will appear:



b) If the user was created in SharePoint REM (see chapter 1.4.1.2 Adding New Users for details), the following dialog box appears, and you can select either you want to delete the user from AD and FBA or from SharePoint REM only:

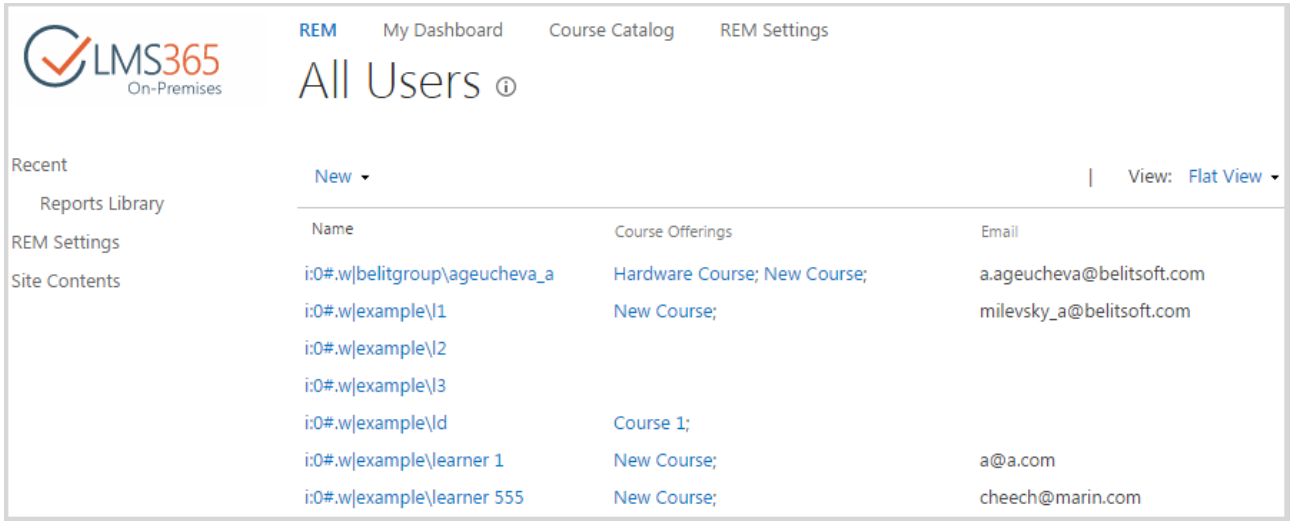


2. Click Delete to confirm the deletion. You will be redirected to the All Users section.

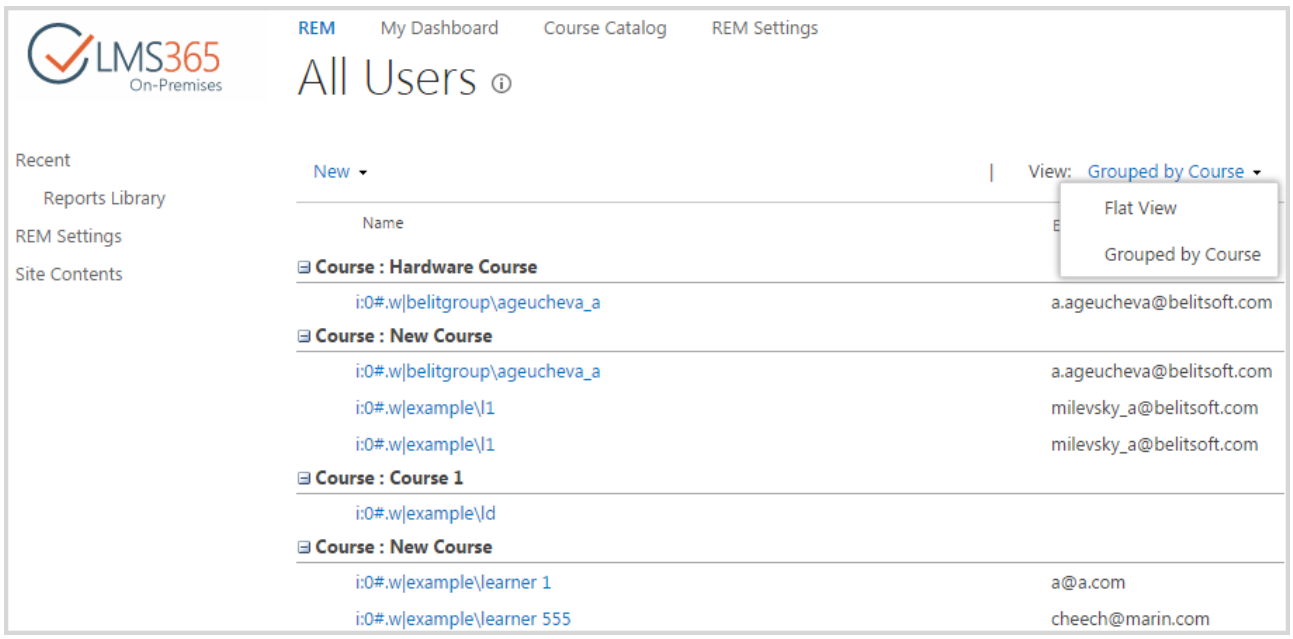
NOTE:	SharePoint REM Users can be managed from the All Users section. Especially it applies to deleting users. For example, after a SharePoint REM user is deleted from a site collection by standard SharePoint scenario (*Settings* > *Site Settings* > *Users & Permissions: People & Groups)*, all registration items remain. This leads to the following: – If you try to delete the registration items of deleted users, these users will not be deleted from the Learners group of LMS Course automatically; – All processes with registration items of deleted users may perform incorrectly.

1.4.4 Changing List View

The learners list has two viewing options: Flat View and Grouped by Course. The default is Flat View:



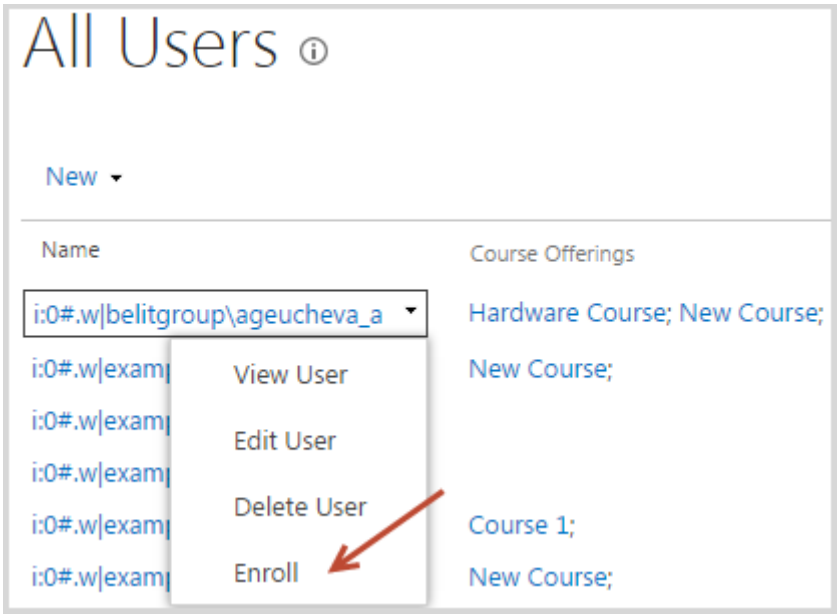
To change it to Grouped by Course, in the View menu, click the drop-down arrow and select Grouped by Course View. This option allows you to sort the users by courses they are enrolled in:



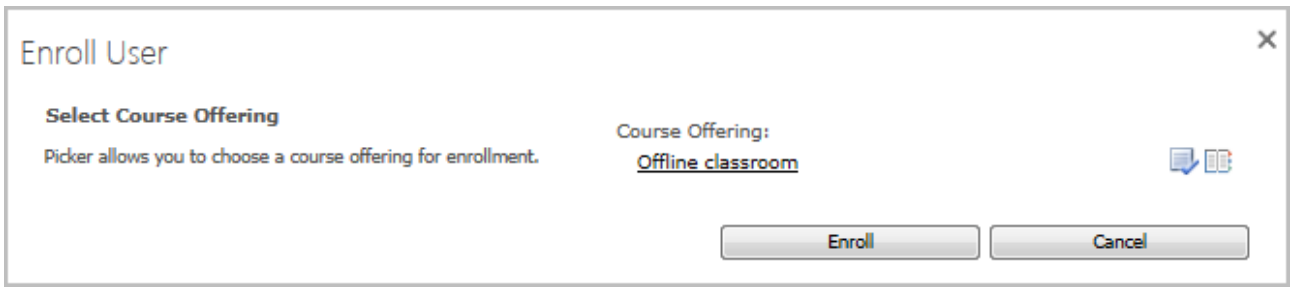
1.4.5 Enrolling Users from All Users

To enroll a new user from the users list, do the following:

1. Go to the All Users section;
2. Click the drop-down arrow next to the user you want to enroll and select Enroll:



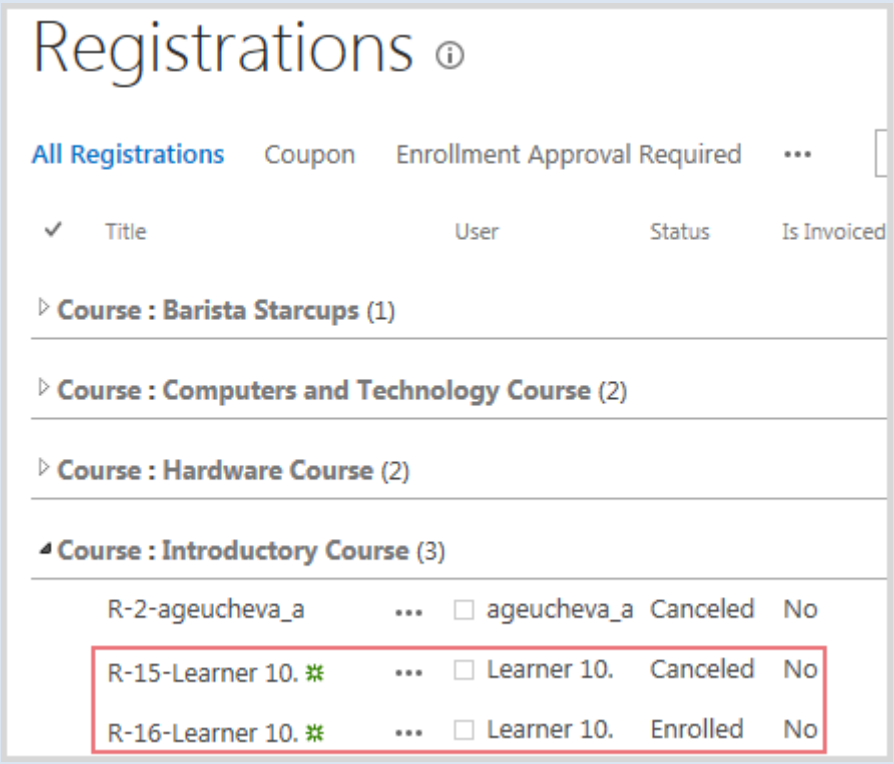
3. In the open dialog box, select ONE course for enrollment:



NOTE:	You can select only a course that has an applied Enrollment Template with active status, and a user should not have an active registration to this course.

4. Click Enroll**.** You will be redirected to the enrollment template of the selected course similar to the mentioned above. Complete the form and click OK.

NOTE: It is possible to have 2 registrations for the same user for the same course offering:

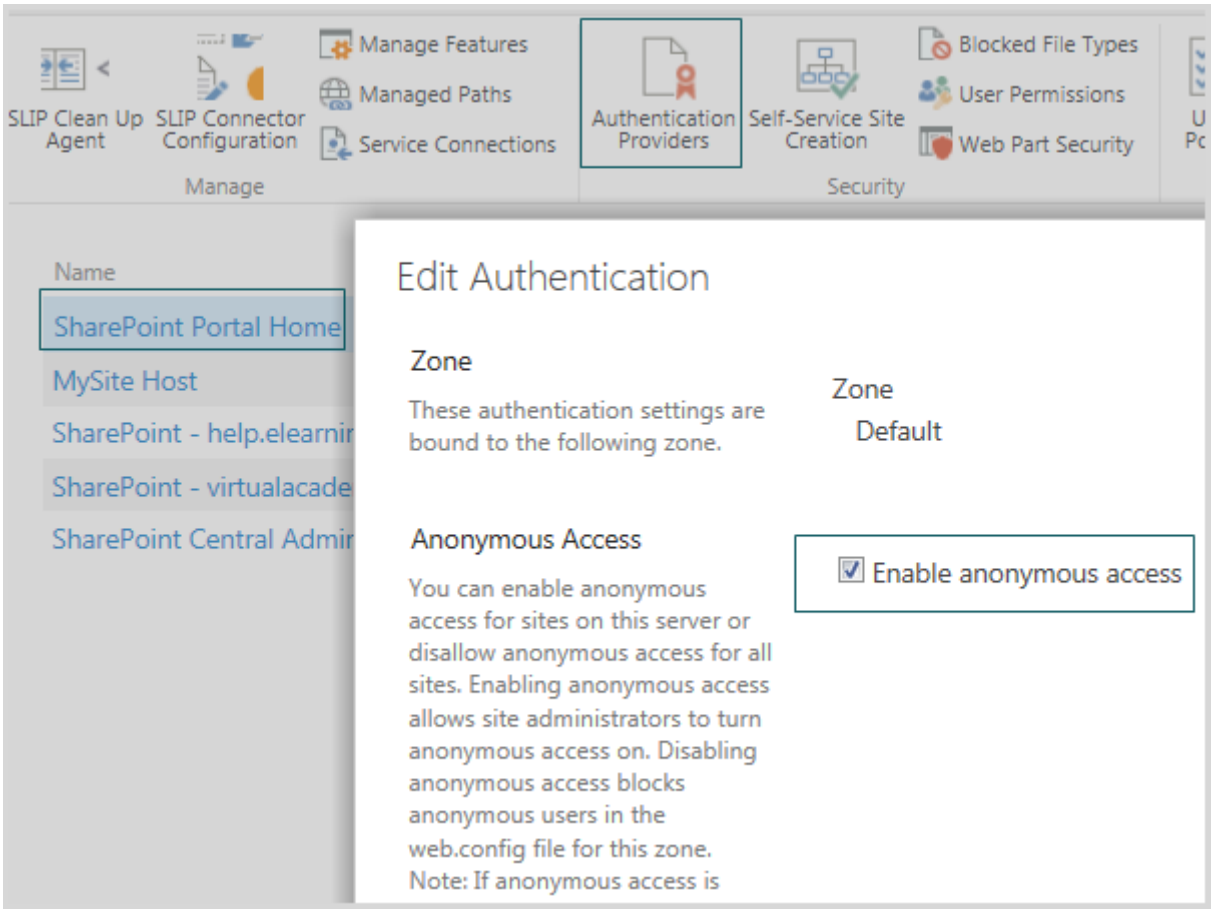


Enrolling user to the course again is possible if his/her previous registration has status: *Course Completed*, *Course Not Completed*, *Canceled*. The new registration has new registration key if the user was enrolled from Course Offerings or All users page, or via Group Enrollment Flow feature. If the 'Add Registrations with Existing Key' button was used to enroll user to the same course offering, the new registration has the same registration key.

1.5 Anonymous access

In case you plan to have a public facing course catalog then a new user should have an access to the Welcome page to be able to register and enroll in courses. To grant such permissions to any anonymous user perform the steps described below to enable anonymous access on REM site.
In case you plan to use course catalog for authenticated users only make sure you have 'Everyone' added to Visitors SharePoint group of the site collection.

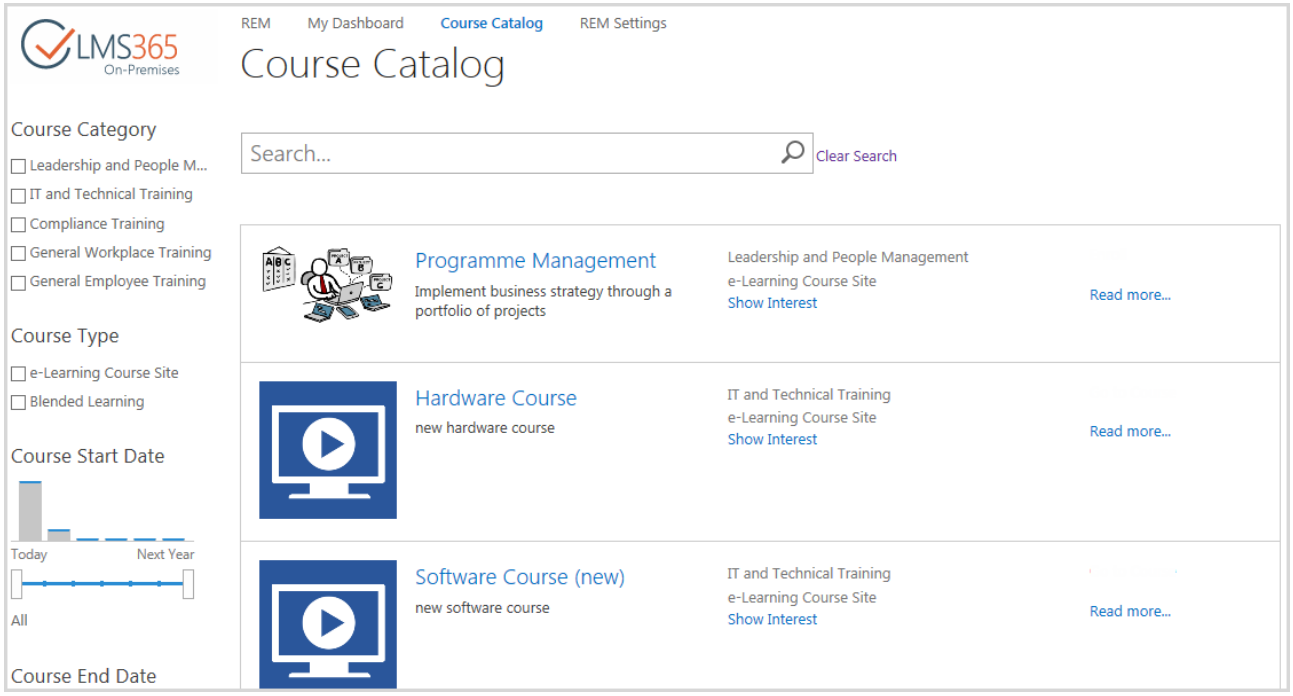
1. Go to Central Administration > Web Applications Management > SharePoint 80 > Authentication Providers > Edit authentication;
2. Select the Enable anonymous access check box:



3. Click Save to apply changes.

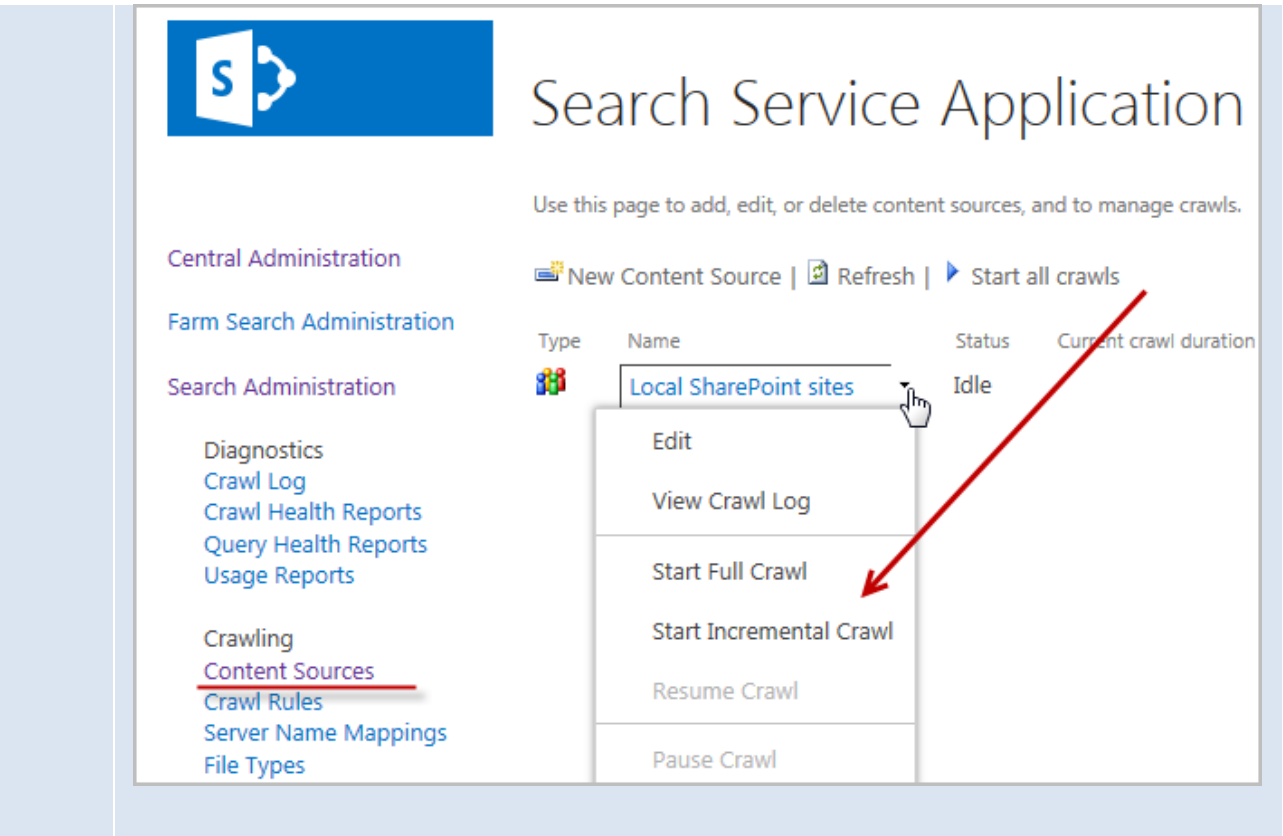
1.6 Course Catalog Search

Course catalog search is based on native SharePoint Search and Managed Metadata services, and is provided by the following features:



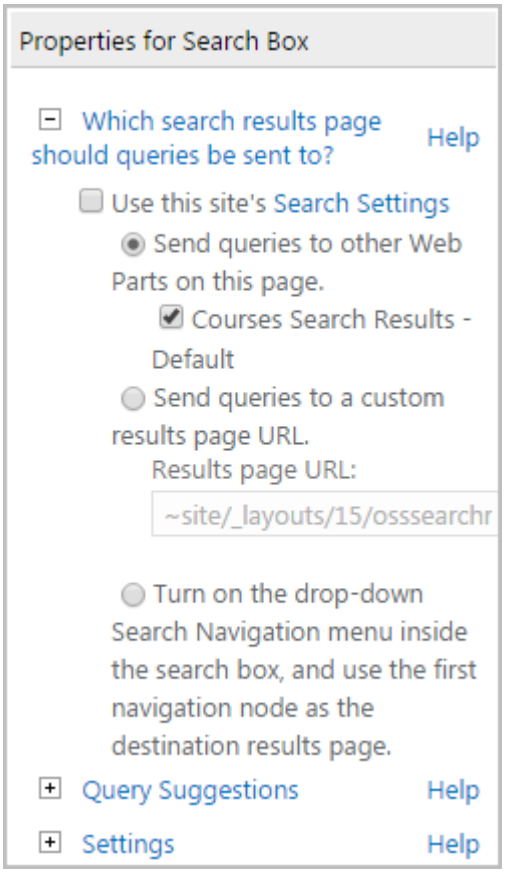
- 'ELEARNINGFORCE – REM: Courses Search Configuration' web application scoped feature. The system attempts to activate the feature automatically during installation of the solution.

NOTE:	Text search in Course Catalog is possible for indexed content only. To index all content of the Course Catalog, you should start crawl process: for the first time after feature activation start Full Crawl, after making some changes (e.g. creating new Courses, Course Offerings) – Incremental Crawl. To do it, go to *Central Administration* > *Application Management* > *Manage service applications* > *Search service application*, select *Content Sources* in the left menu and select to start Full or Incremental Crawl for Local SharePoint sites:

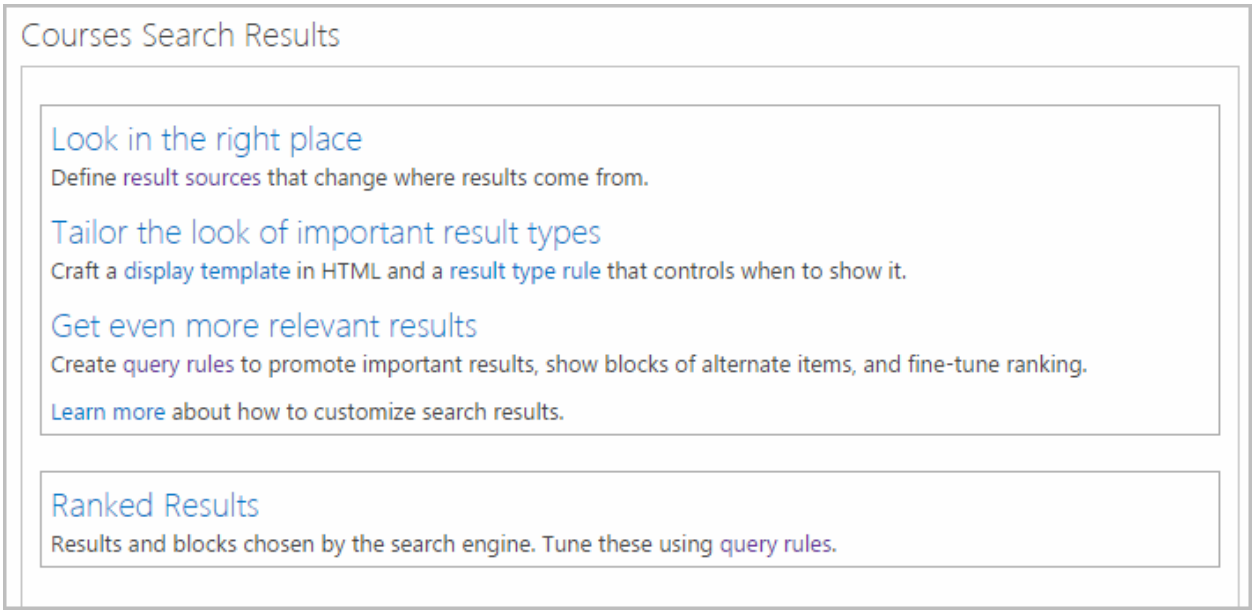


When the feature is activated the term store group 'ELEARNINGFORCE REM4' is created in the managed metadata service connected to web application. The term store group contains default term sets Course Categories, Course Types, Locations & Rooms with samples.

- ELEARNINGFORCE – REM: Courses Search site collection scoped feature (ELEARNINGFORCE – REM: Courses Search Configuration web application feature is its prerequisite). The system attempts to activate the feature automatically during creation of REM host site collection. After feature is activated the following content is installed within the REM site collection:
    - REMCourses v2 result source (site collection scope):
      The result source is used by full text search and defines the search rules that allow search within the published active courses that allow direct enrollment with active course offerings. After feature activation Full Crawl need to be run to index the content of the REM sites;
    - CourseCatalogSearch.aspx page with the following web parts:
        - Search Box Web part is OOTB SharePoint web part that allows inputting text query and redirects users to the search result page. Edit this web-part to configure properties for search box: search settings, query suggestions and settings:



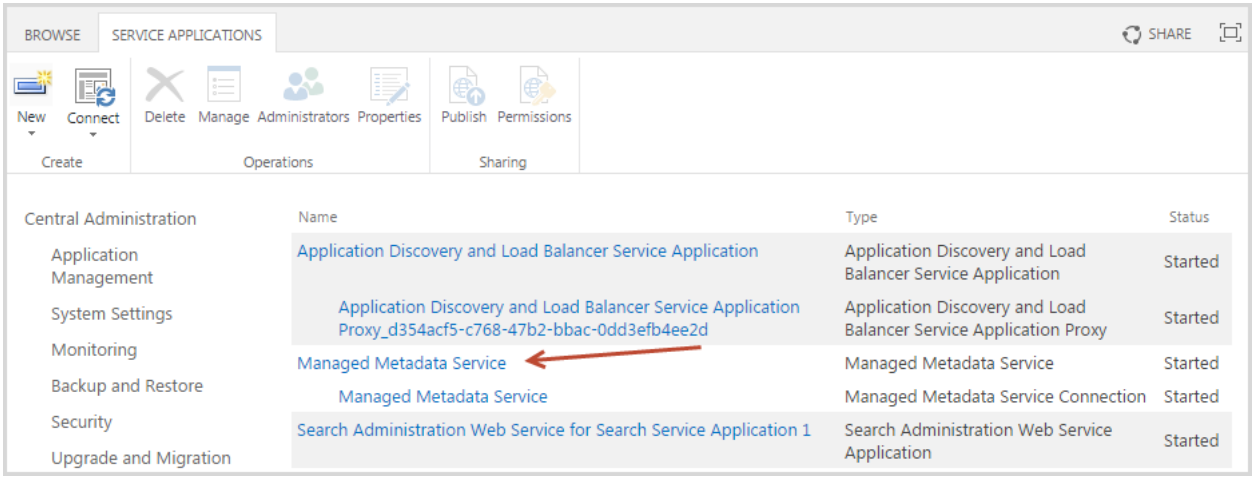
- Course Search Result Adapter Web part is a web part that transforms full text query from Search box to the query compatible with Courses List web part. Course Result Adapter web part allows configuring result sources, display templates, result type rules, query rules and setting display of ranked result and promoted result in the search results field:



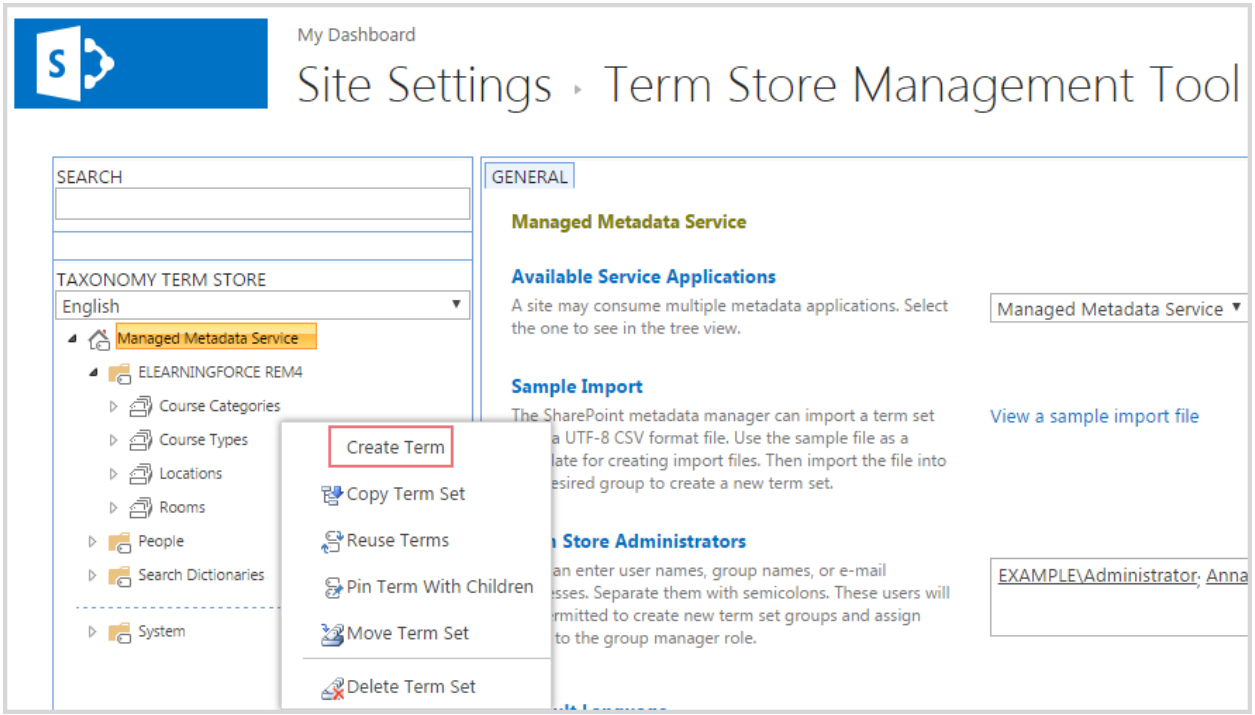
1.6.1 Add new category to ELEARNINGFORCE REM4 term store

To add a new Course Category, do the following:

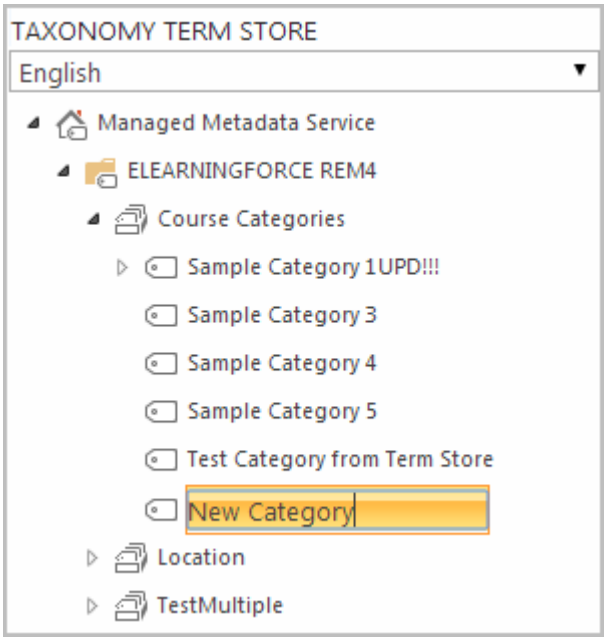
1. Go to Central Administration > Application Management > Service Applications > Manage Service Applications and select Managed Metadata Service:



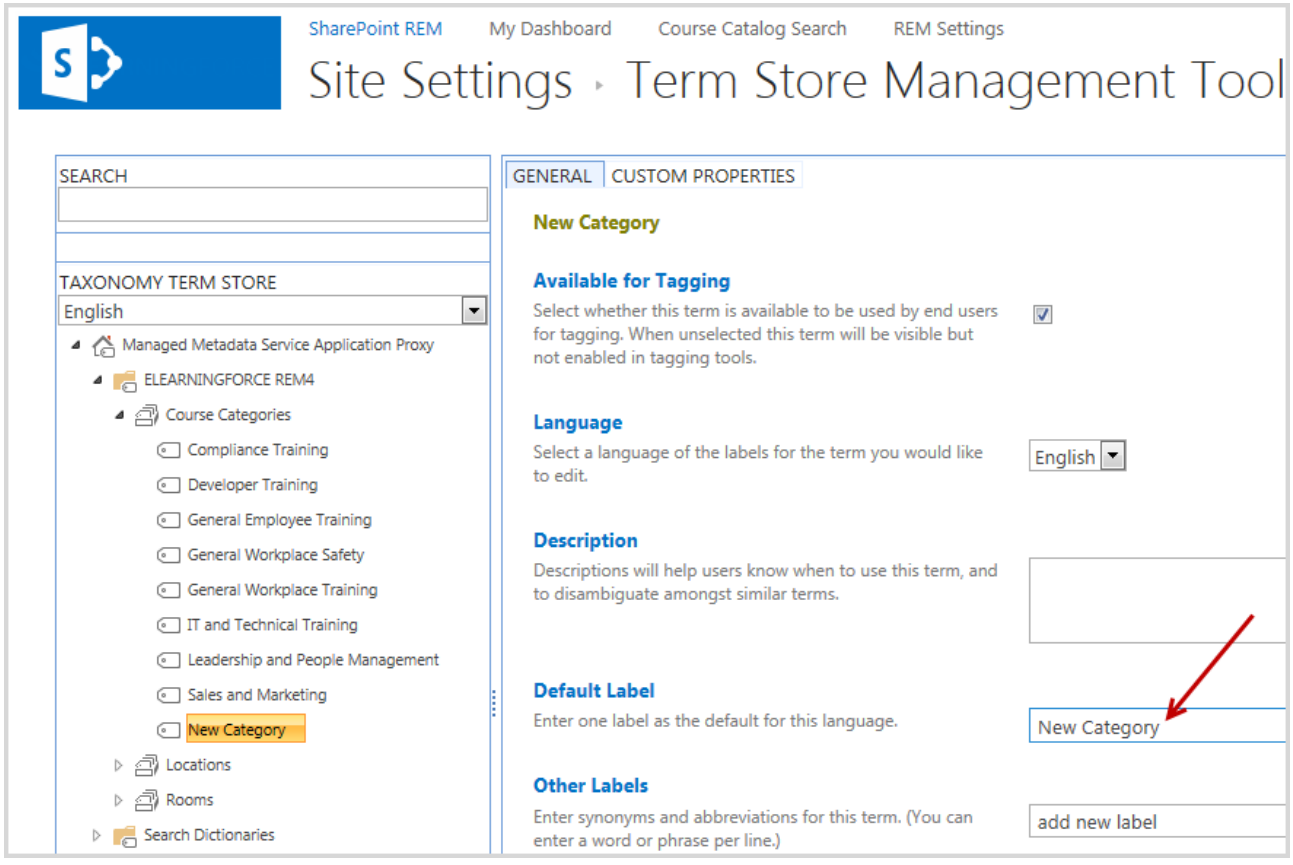
2. In the opened Term Store Management Tool select Managed Metadata Service > ELEARNINGFORCE REM4 > Course Categories > Create Term:



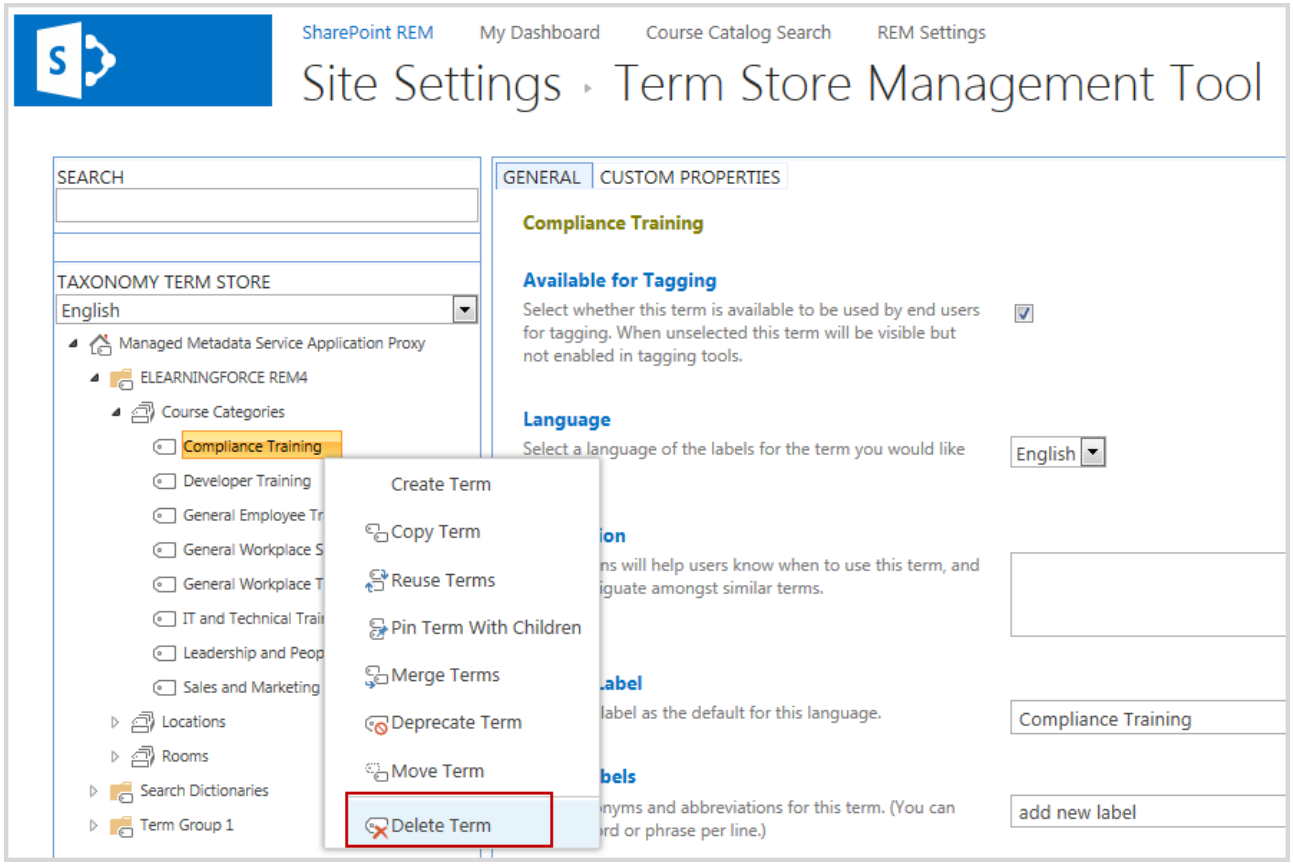
3. Enter Title for the new category:



The new category will be available in all REM sites within the farm.
To edit an existing category, double-click on its name or select a category and edit the Default Label:



To delete a category, select a category and click Delete Term in the drop-down menu:



NOTE:	The terms' default labels are created in English and it is up to customer to create labels on other languages.
NOTE:	After the REM Courses Search feature is activated, *Categories* section does not function: old categories are displayed for courses created earlier in the Category field, but cannot be assigned to new courses and are not available in the *Category Refinement Panel* in *Course Catalog Search*. In order to use categories created before the feature activation, create the same categories again using the Term Store Management Tool.

1.7 REM Publishing feature

This feature provides a set of pages stored in the Pages library. These pages provide enrollment flow for the end user, home page and navigation concept. The feature's functionality is based on OOTB SharePoint Server publishing capabilities such as dynamic page layouts, navigation, and target audience. The system attempts to activate this feature automatically during creation of REM host site collection.

REM Publishing is a site collection scope feature that activates several hidden features. The required activation dependencies are activated automatically:

- SharePoint Publishing Server Infrastructure;
- SharePoint Publishing Server;
- REM Courses Search.

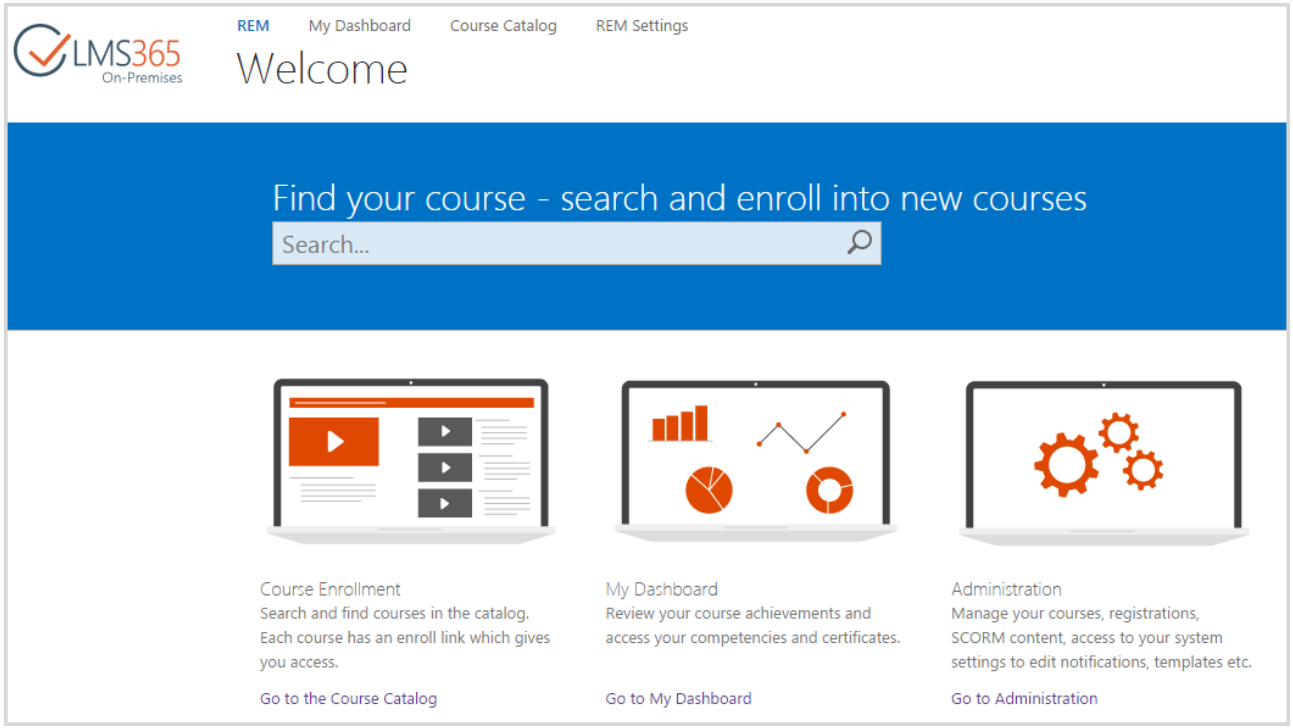
Hidden features that are activated with the feature REM Publishing:

1. Text Template Updater – see description below. The feature is hidden and not visible through the UI;
2. REM Publishing Pages – this is site scoped feature that provides content described below. The feature is hidden and not visible through the UI.

The pages installed by the feature REM Publishing Pages are as follows.

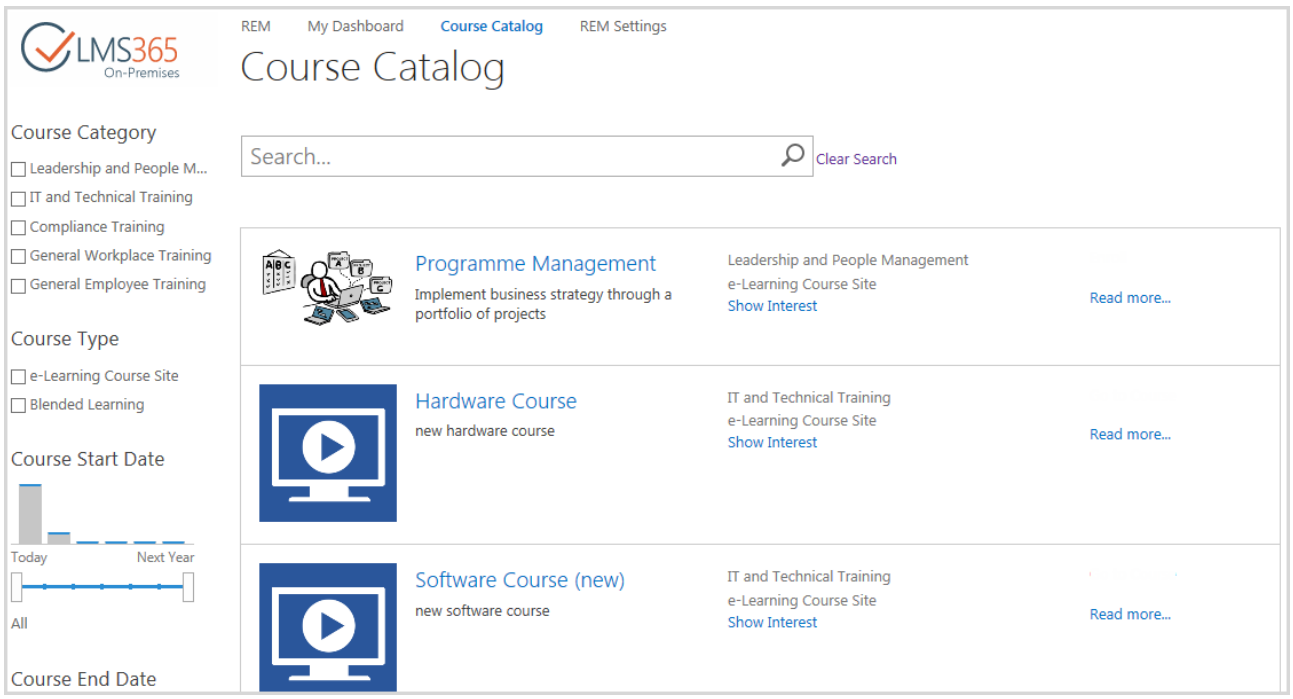
1.7.1 Welcome Page

Welcome.aspx is a home page for all type of users i.e. there is no redirection logic depending on users' permission (like in previous version). From the page users can search courses using search field, navigate to the Course Catalog Search page, to the My Dashboard (if enabled) and to the REM Settings page (Administration page is displayed for administrator role only) using links or icons:



1.7.2 Course Catalog Search Page

CourseCatalogSearch.aspx allows users to search and view courses available for enrollment, apply various search filters and navigate to the course details page:

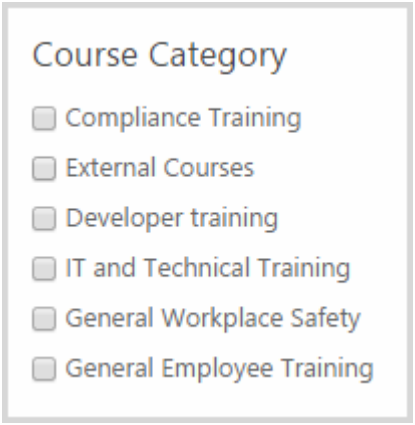


Once the content is crawled it is possible to search courses by the following shared fields:

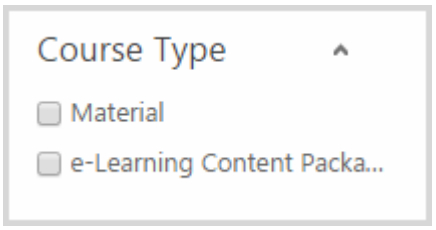
- Course Title;
- Course Type;
- Course Category;
- Course Short & Long Description;
- Course Competency;
- Course Materials;
- Teachers.

Default search filters that could be applied on this page:

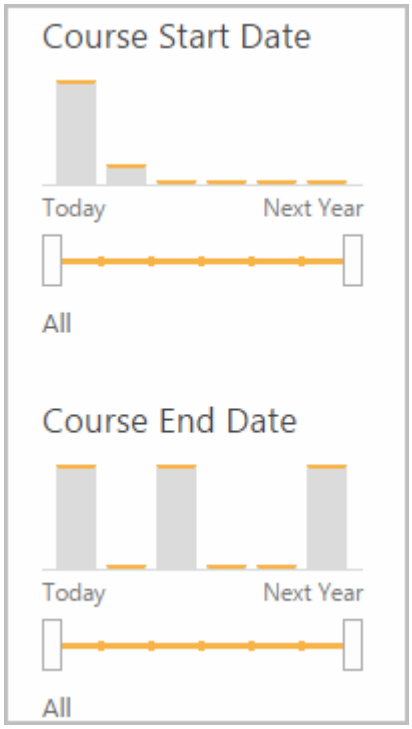
- Course Category Refinement Panel shows links that by default apply filters by *Course Category* field from Courses list (it can be configured to any other list and any other managed metadata field from the list):



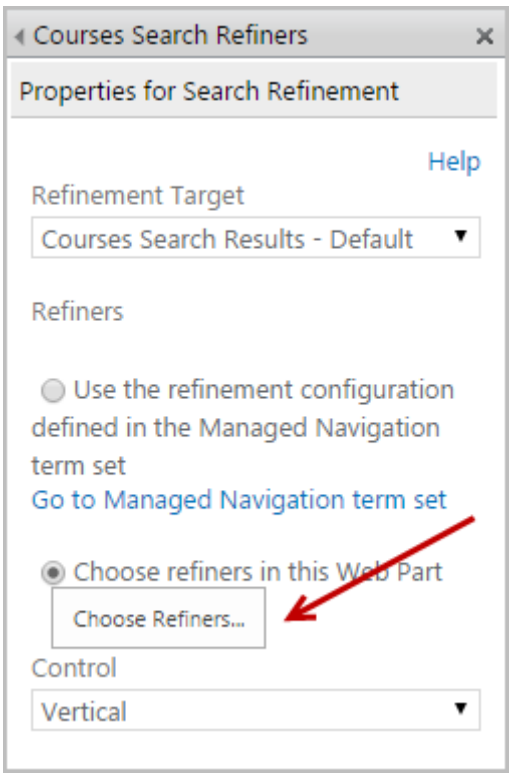
- Course Type Refinement Panel – shows links that by default apply filters by *Course Type* field from Courses list (it can be configured to any other list and any other managed metadata field from the list):



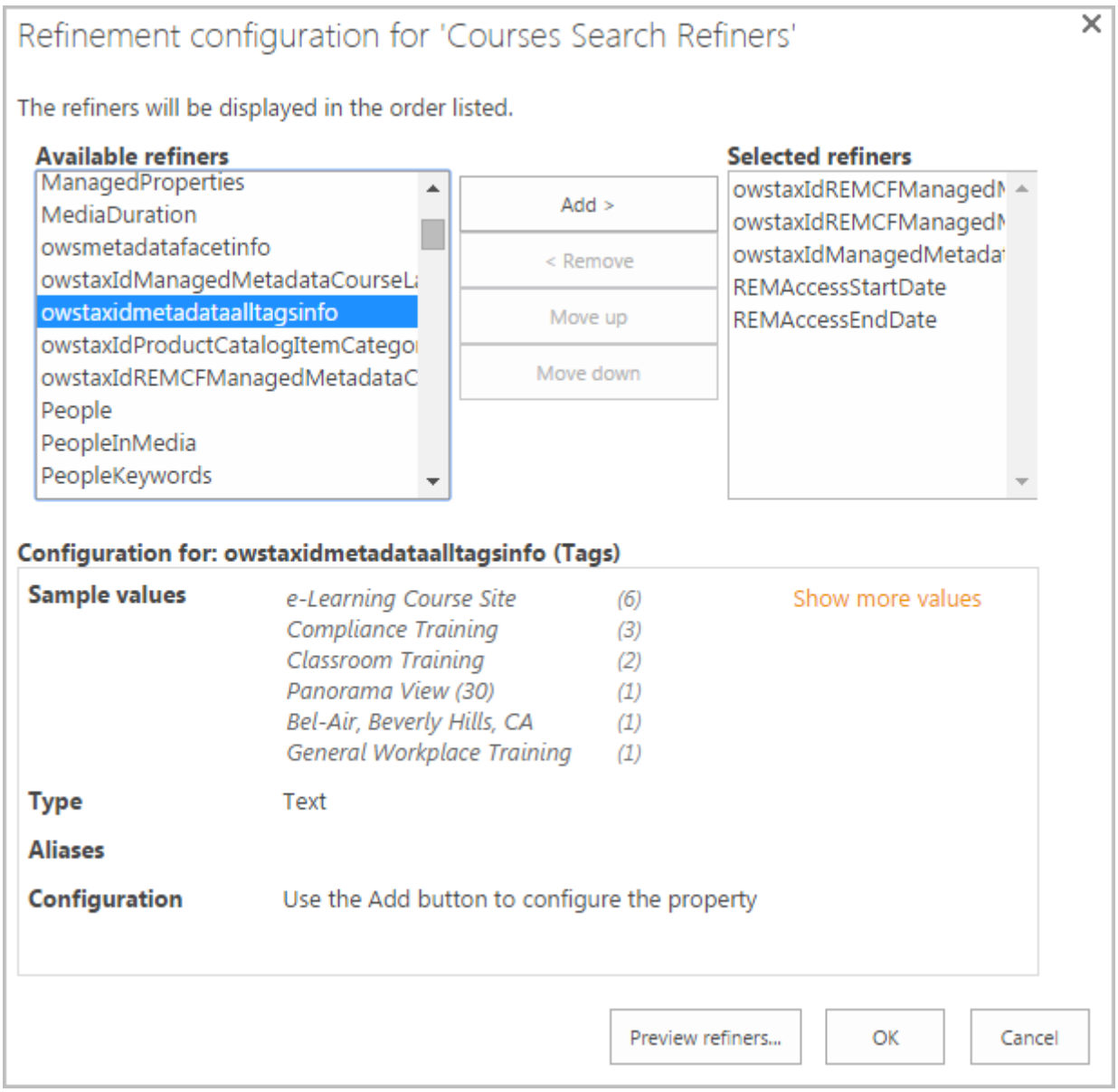
- Course Access Period filter allows applying filter by Course Offerings Access Start and End Dates:



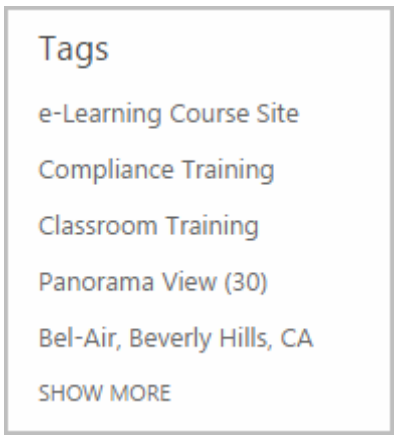
To add other filters enter the page edit mode and change the settings of the Courses Search Refinement web part:



Choose additional Refiners to be added to filters:

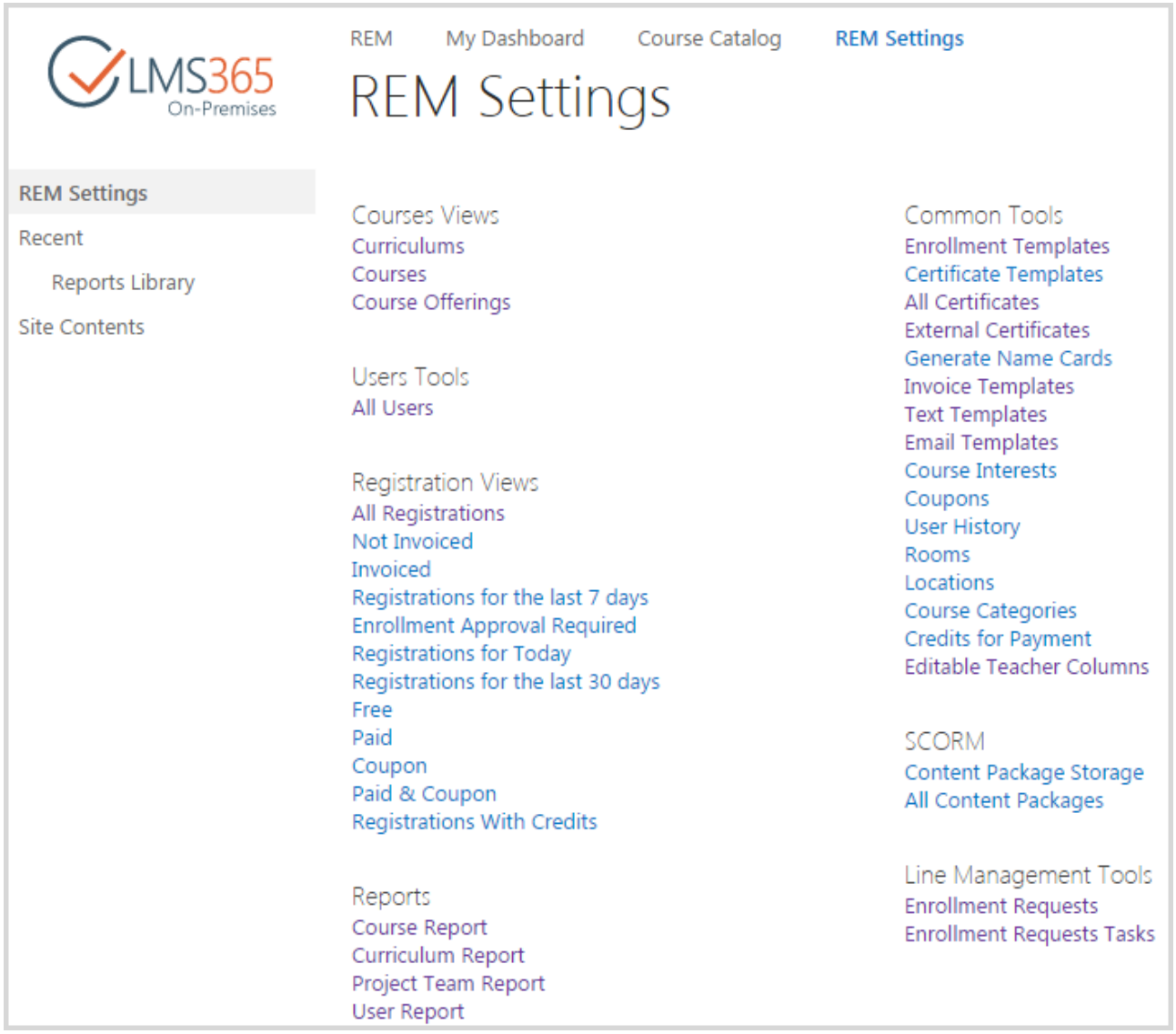


The selected refiners will appear on the courses search page:

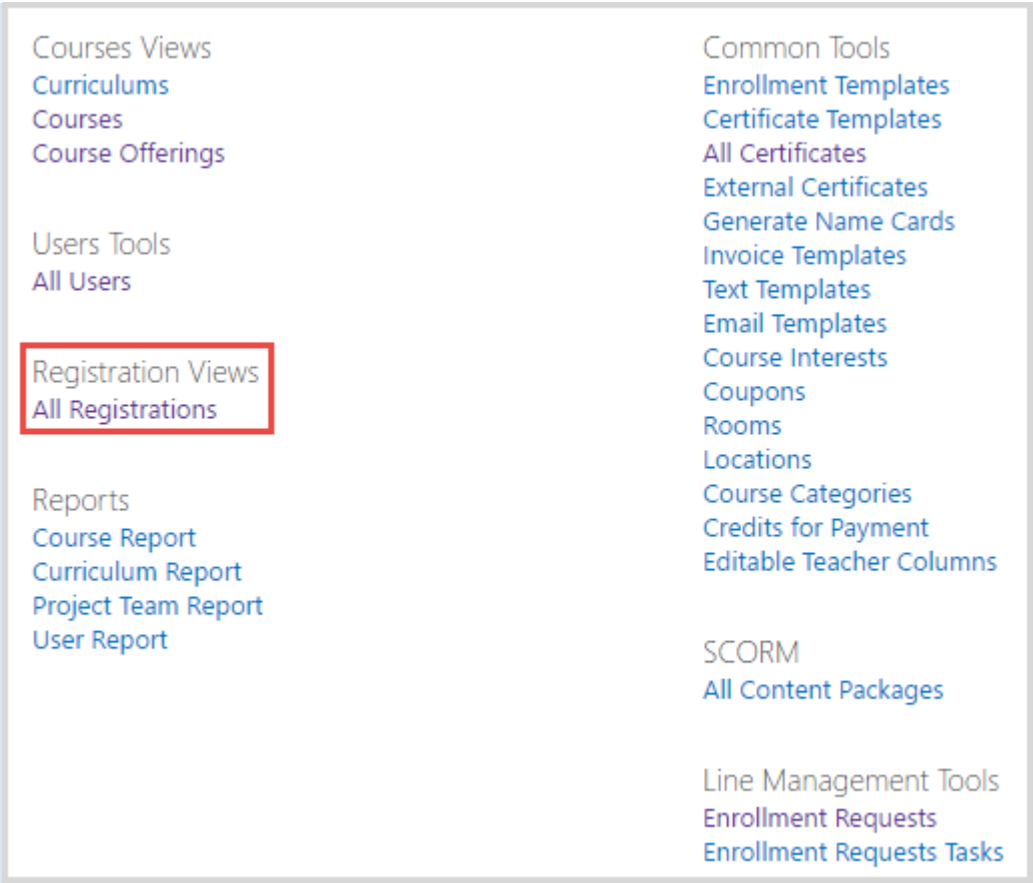


1.7.3 REM Settings Page

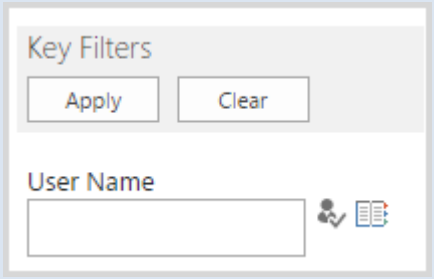
REMSettings.aspx is a page that is intended for administration staff. The page has unique permissions and available for all REM groups except Learners and Visitors:



NOTE:	On newly created sites, Metadata Navigation and Filtering feature is activated by default, which allows creating a large number of users' registrations and avoid threshold limit excess error (when there are more users then set for List View Threshold) on Registrations list after registrations have been created. On newly created sites, there is only one flat view with the combination of search-box and filters:



You can use User Key Filter on All Registrations list to filter necessary information:



More filters can be added in the List Settings > Metadata navigation settings > Configure Key Filters. Do not forget to check whether new Key Filters have been added to the Indexed Columns. If not, you should index new Key Filters manually. To do this, go to List Settings > Indexed columns > Create a new index > select needed column and click Create button.

1.7.4 Course Details Pages

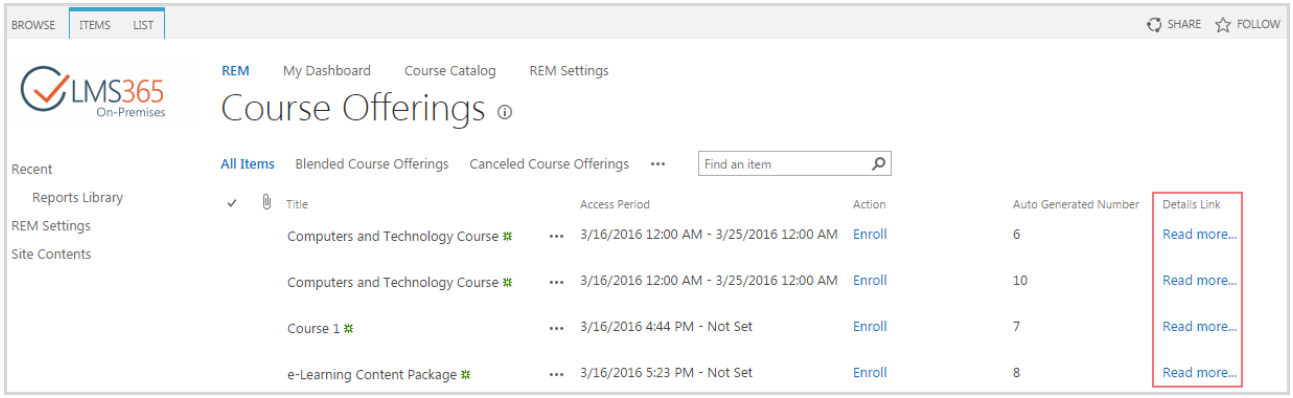
For each course the following pages are created:

- Course Details page - default landing page for displaying a course inside the Course Catalog containing an Enroll button and list of available course offerings;
- Course Offering Details page - landing page for the selected offering with public information;
- Registration Details page – landing page containing all available information about the enrolled course/offering enabling the Learner to access meeting information or the My Learning Web Part from this page.

These pages contain different web parts depending on course type.

1.7.5 Details Link Field

The Courses list and Course Offerings list contains several new fields that link to the Course Details and Course Offering Details page:



1.7.6 REM Update Text Templates

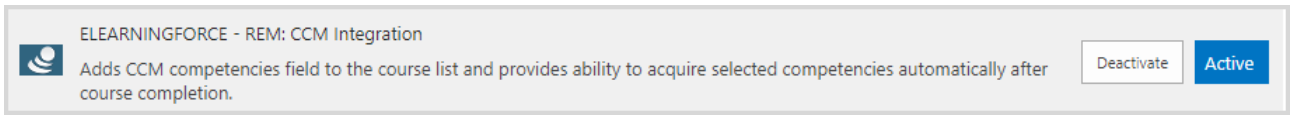
This is a hidden feature that is activated automatically with REM Publishing Pages. The feature creates new version of each text template from Lists/Text Templates library. Every text template contains text according to template meaning and has the following web parts:

1. Course Details;
2. Course Offering Details;
3. Go To Course Catalog.

After the ELEARNINGFORCE – REM: Publishing feature is deactivated the first version of text templates will be restored.

1.8 CCM Integration

The functionality of integration with SharePoint CCM allows granting particular personal competencies in CCM automatically for the users who complete REM course. To activate the feature, go to Settings > Site Settings > Site Collection Administration > Site Collection Features:



The functionality requires SharePoint CCM 2.1.1.x or higher. If SharePoint CCM is not installed or version of SharePoint CCM does not meet the version requirements, the SharePoint REM will continue working as before but the feature functionality will not be available.
The ELEARNINGFORCE – *REM: CCM Integration* feature installs the following content:

1) Makes field *Competencies* in the courses list available in all course types within the list. The field is available for editing when installed SharePoint CCM version meets the requirements.
2) Adds event receiver to the registrations list. The receiver checks whether the registration status is changed to *Course Completed*, and if true – the receiver ensures competency levels for the user.

After the feature is deactivated the field *Competencies* should be hidden and the receiver should be removed from the list.

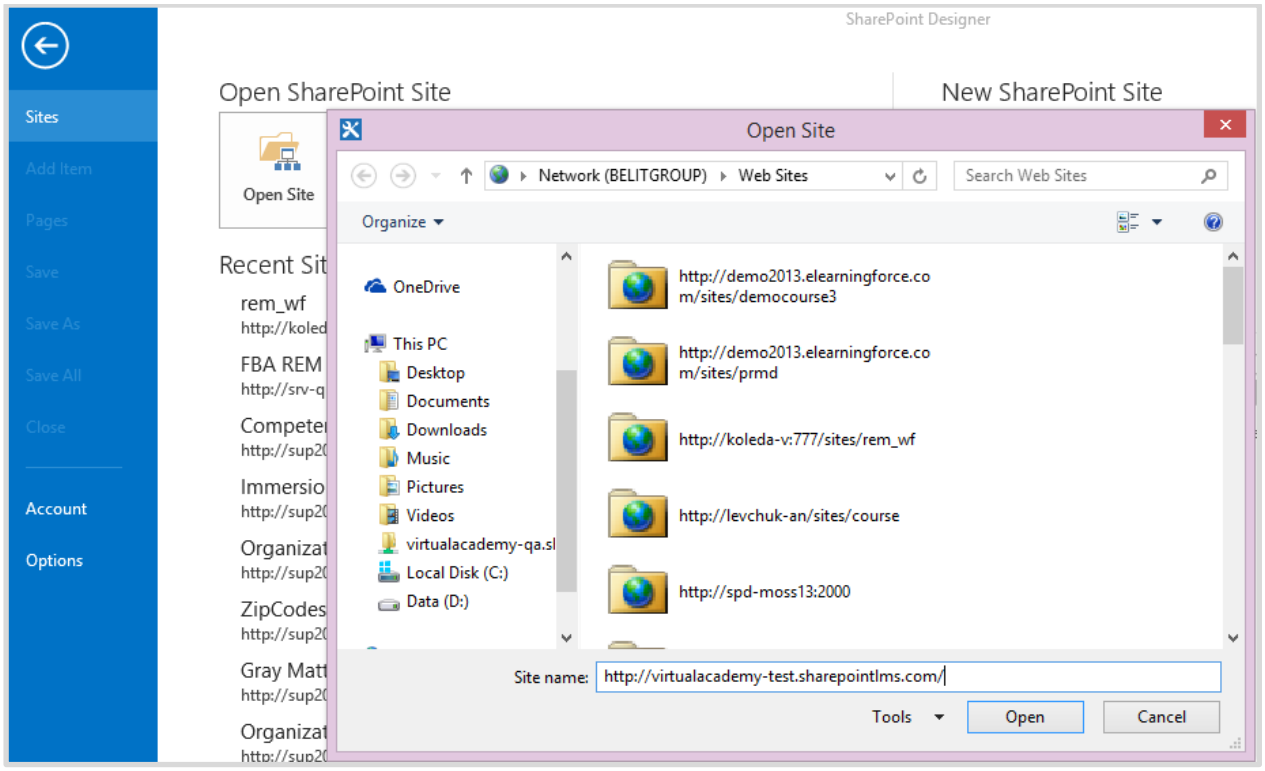
1.9 Custom Enrollment Flow

Custom approval type is designed to give more control over the enrollment flow, and implement custom conditions for it depending on the needs of organization. Custom enrollment is based on support of SharePoint 2010 workflows (SharePoint 2010 workflow platform is installed automatically with SharePoint 2013 products).
To configure a custom enrollment flow, create a SharePoint workflow first, and then attach it to the enrollment template. Study below-stated example of how to create an approval workflow in 2010 platform to have 'HR responsible' users approve enrollment requests before a registration is created. However, the feature is not limited to the functionality described in the example. It is possible to adjust a workflow depending on your needs e.g. set multiple groups for enrollment approval.

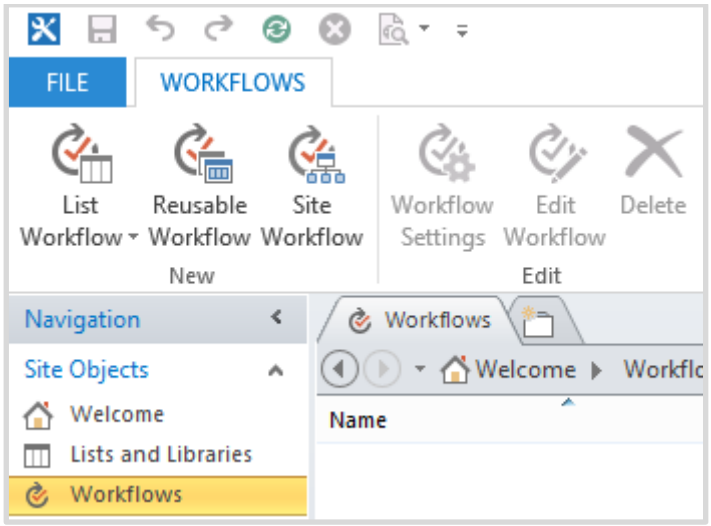
NOTE:	You might need to activate the following features on REM site collection before creating a workflow: • 'SharePoint Server Standard Site features' site feature; • 'SharePoint Server Standard Site Collection features' site collection feature; • 'Workflows' site collection feature.

1.9.1 Creating SharePoint 2010 Workflow

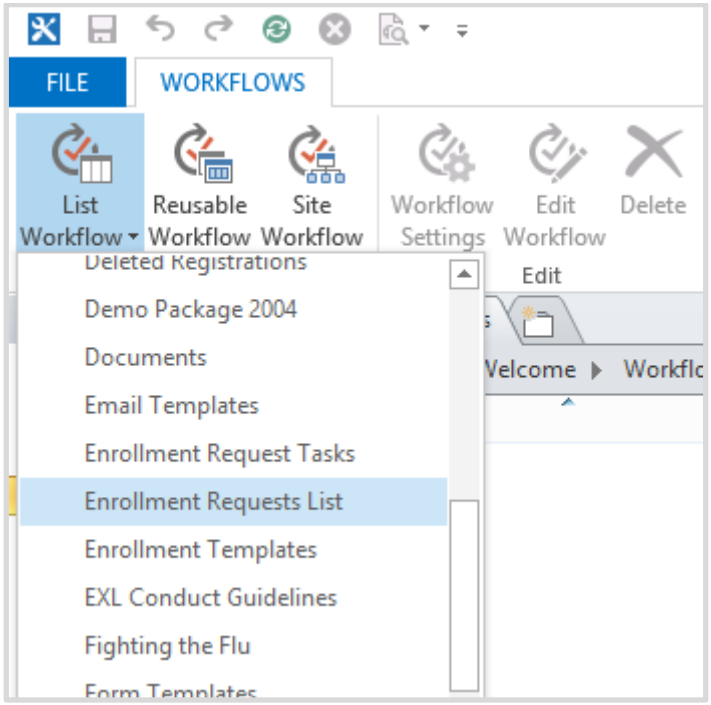
1. Open REM site in SharePoint Designer 2013:



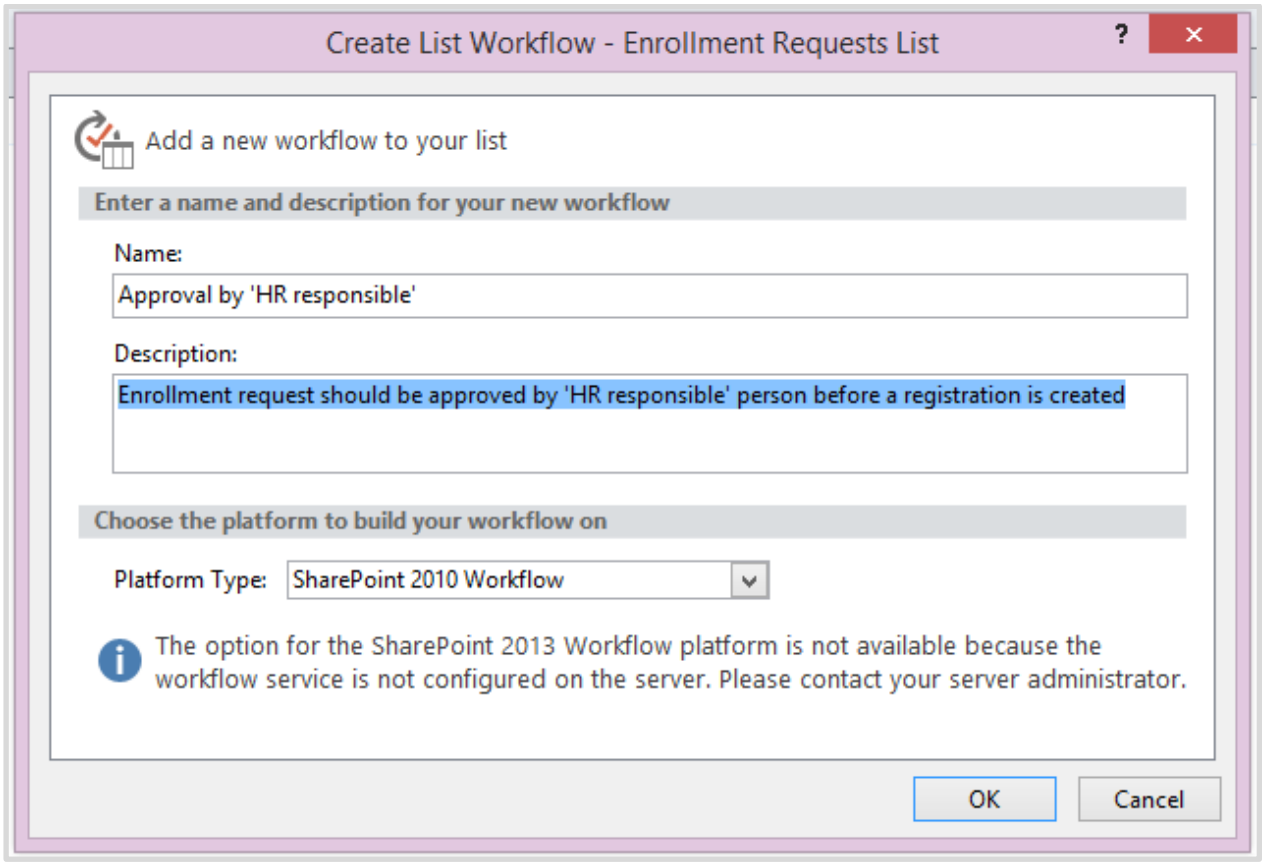
2. Go to 'Workflows' site object:



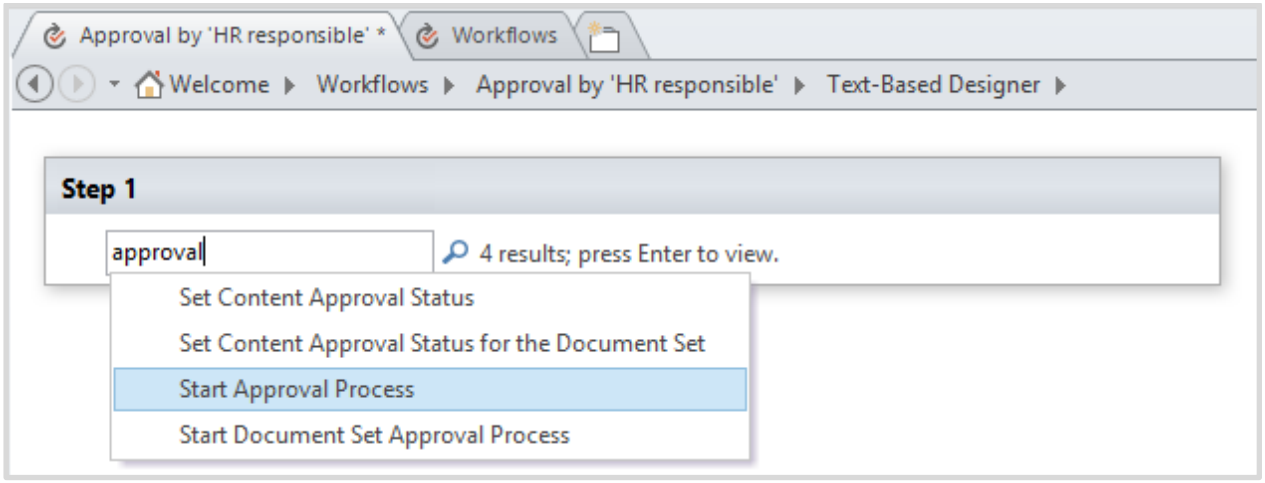
3. On the ribbon find 'List Workflow' action and select 'Enrollment Requests List':



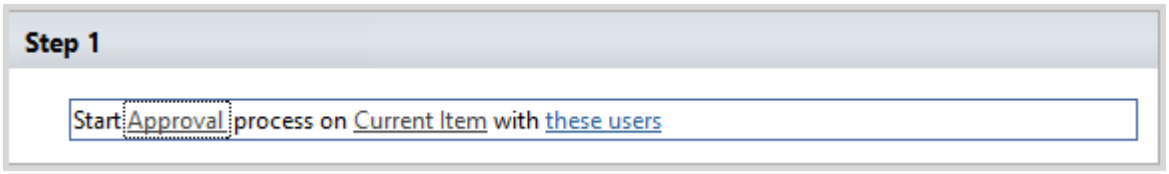
4. Create workflow and select 'SharePoint 2010 Workflow' in the Platform Type:



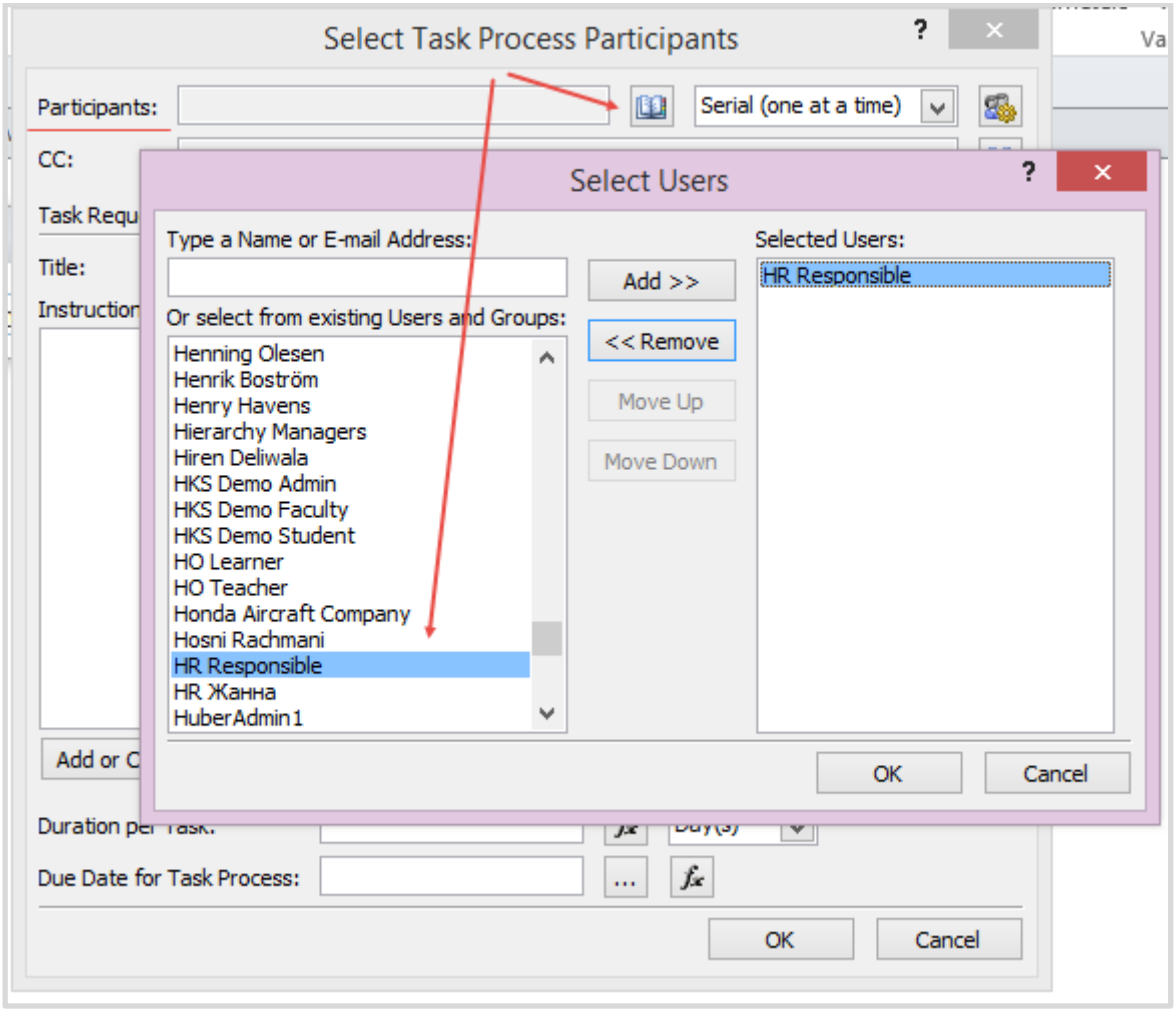
5. Select the 'Start Approval Process' action:



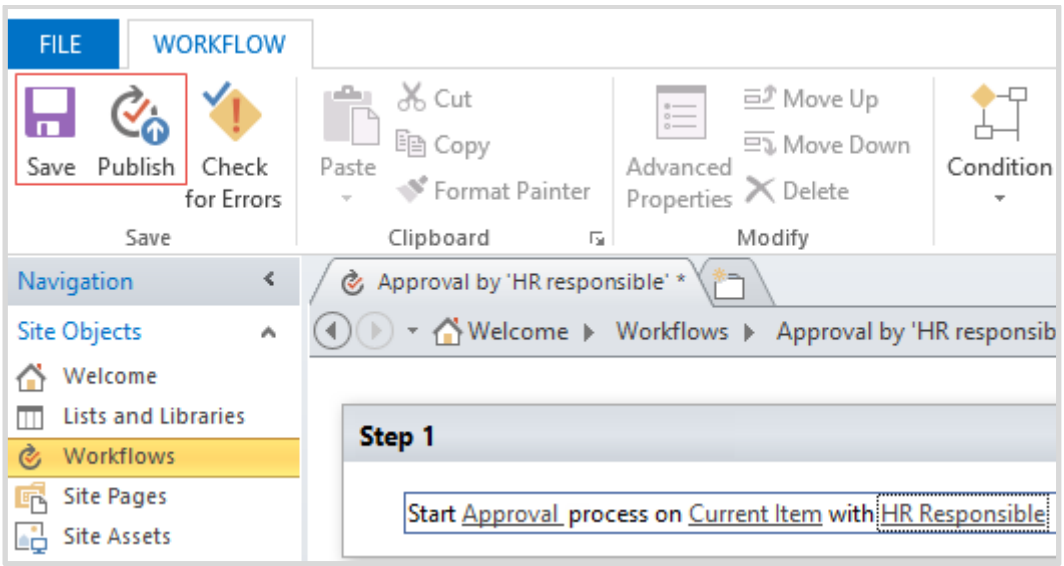
6. Configure the action. For this workflow, select 'HR responsible' group for approval of enrollment requests. Click 'these users' link:



Select the needed group:



7. Save and Publish the workflow:



1.9.2 Attaching workflow to enrollment template

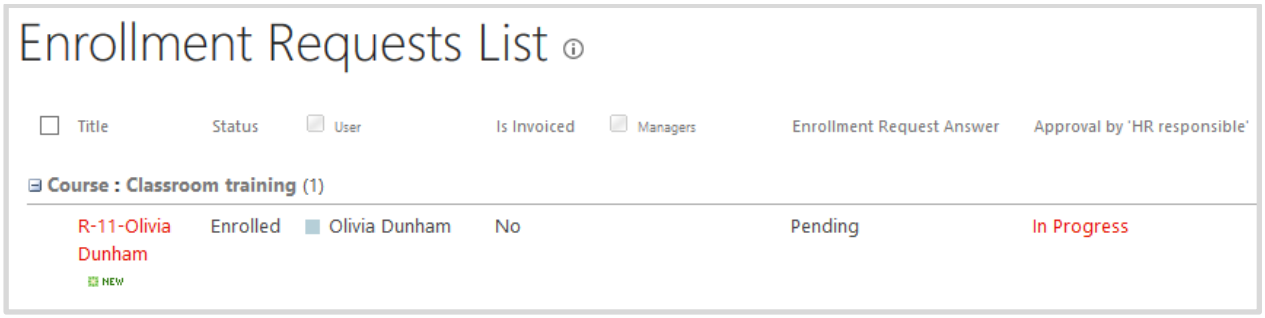
1. Go to REM Settings > Enrollment Templates list, create new or modify existing enrollment template;
2. In the 'Approval Type' field choose 'Custom'. A new dependent field next to approval type will appear:

The system will display published workflows found on this site. Select the workflow created in the previous step:

3. Save the changes.

1.9.3 Enrollment process

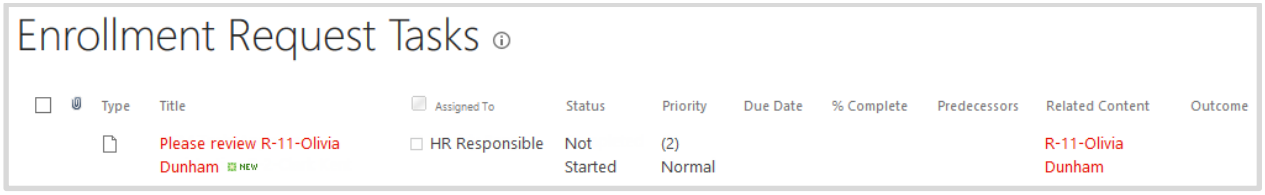
Example above uses default 'Enrollment Requests List' and 'Enrollment Requests Tasks' lists of the REM site to process the workflow. Once user is enrolled to a course that uses enrollment template with custom approval, the workflow is started and request task is created:



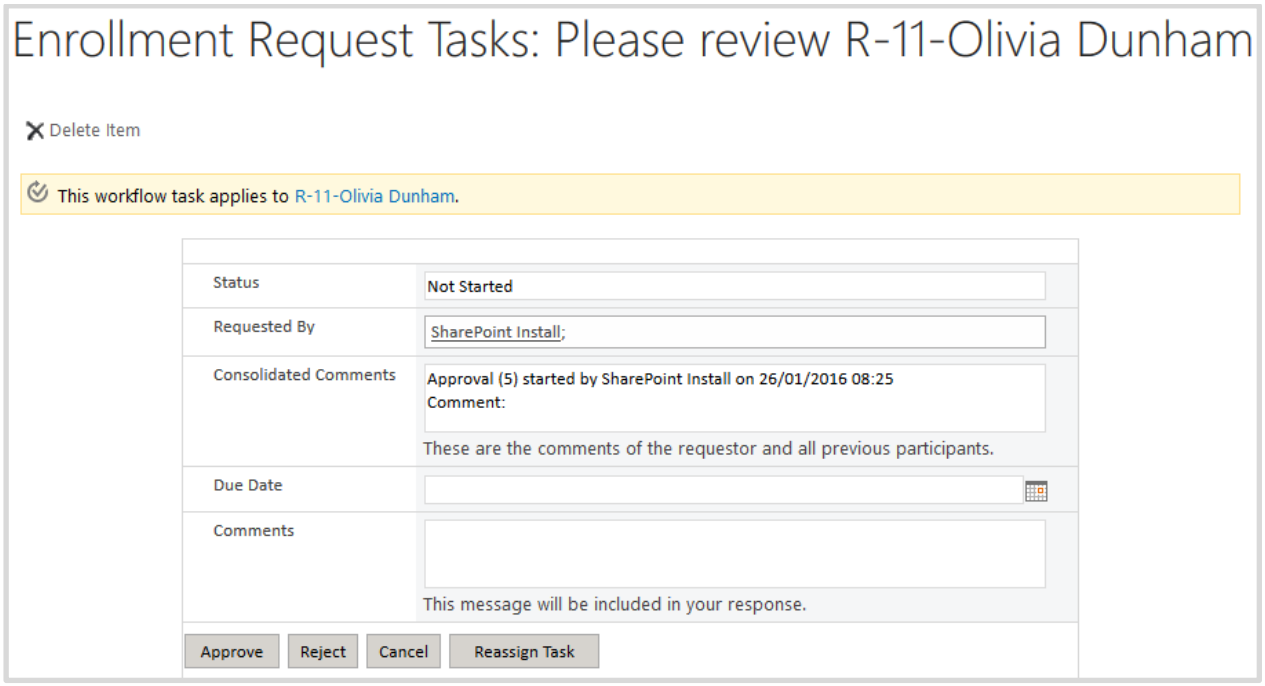
User who is assigned as 'HR responsible' in Olivia's profile in CCM has **'read'** permissions to the request.

NOTE:	Request is not created if user who is meant to approve it is a member of group that is specified in 'People who can automatically approve registration requests' field of the enrollment template. If workflow has multiple participants a task is created for each participant (participant group).

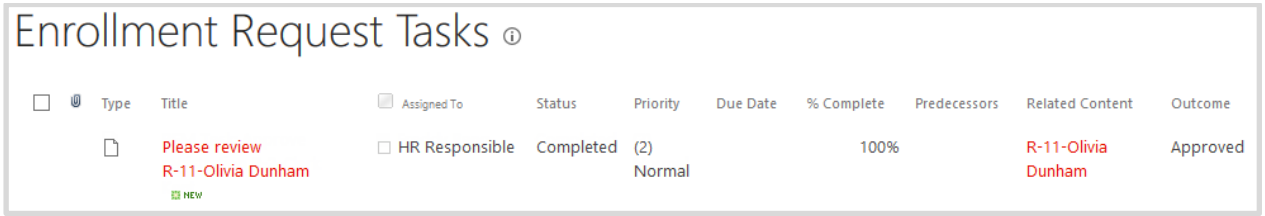
Tasks are created in the 'Enrollment Request Tasks' list:



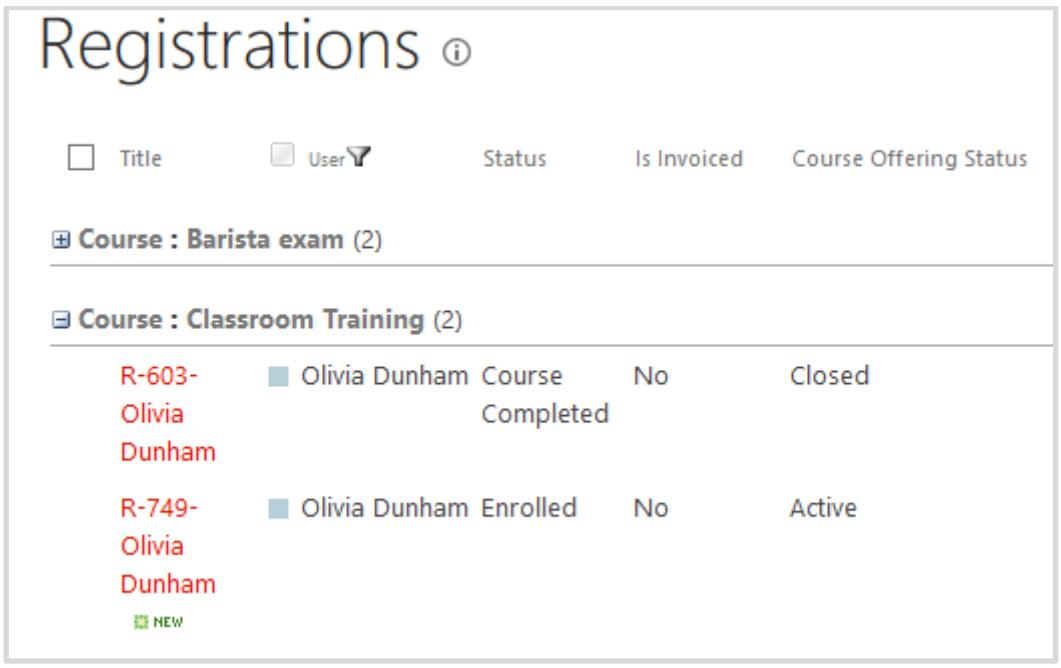
'HR responsible' user has **'contribute'** permissions to the task, and can approve it by clicking 'Approve' button on the view form:



The request status will be changed to 'Approved':

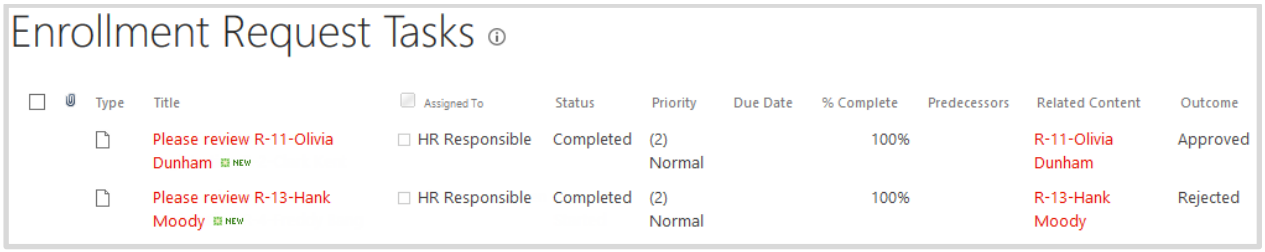


Registration will be created with status 'Enrolled' after approval is done:



NOTE:	The following rules apply to the approval process: • Line manager and HR responsible can approve task(s) of own subordinates only; • If a user does not have any managers, then LMS administrator should approve the request task; • If a user has more than one 'HR responsible' manager, then one of them should approve the task (tasks are not created for each manager but for participant (participant group) of the workflow).

In case request task is rejected, its status is changed to 'Rejected', and registration is not created for the user:



1.10 Bulk Import External Certificates

Use the following PowerShell command to upload large number of external certificates:

```
Import-REMExternalCertificates http://REM_host_URL -Path
c:\certificates.xlsx
```

NOTE:	You can use optional parameter BatchSize to set the batch size (the default batch size is 100).

You can upload either an .xlsx (.xls files are not supported) or a .zip file.

- Fields that must be included in the imported .xlsx file: User Name, Course Name, Issued Date, Company, Expiration Date, Training Points, Competency Levels, Certificate Image or Certificate Template, Automatic Revocation. You can add 'Score' column to the .xlsx file as well (it is not required);

NOTE: The sample .xlsx file data is shown on a picture below:

	A	B	C	D	E	F	G	H	I	J	K
1	User name	Course name	Issued date	Train	Company	Competency levels	Expiration date	Certificate image	Certificate template	Automatic revocation	Score
2	example\red_2	ZIP	04.04.2016	150	BITS	c1-Poor	03.04.2017	image.jpg		no	

- .zip file must include .xlsx file with all necessary information and certificate image. In the Certificate Image field specify corresponding image name from folder inside an archive (relative path defined in .xlsx);
- Use a default certificate template if other is not specified OR a full URL.

NOTE: Imported file is validated first and if there are any errors, you can download Error Log to see these errors. They can be as follows:

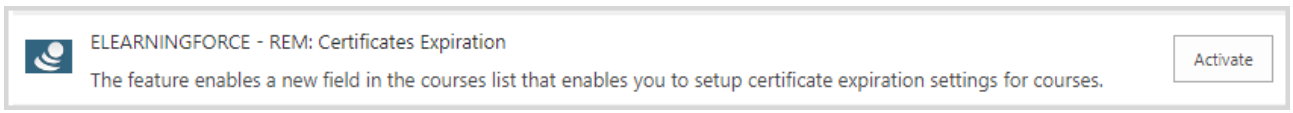
1. User name: User not found or inactive;
2. Completion date (issued date):
    - Date format not recognized;
3. Expiration date:
    - Date format not recognized;
4. Training Points:
    - Not correct format (not an integer);
    - Out of range (negative);
5. Competency: Competency does not exist;
6. Competency level: Competency level for associated competency does not exist;
7. Certificate image: Certificate template also defined;
8. Certificate template:
    - Certificate template not found;
    - Certificate image also defined.

1.11 REM Certificates Expiration feature

The functionality allows setup the expiration settings for certificates that users gained within the SharePoint REM courses.

NOTE: After the recertification process of e-learning and blended courses, along with the certificate expiration all learner's progress gained within these courses will be deleted.

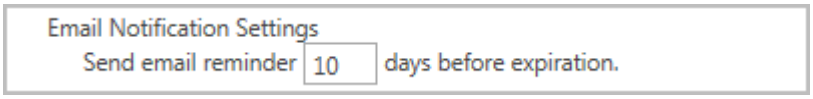
The functionality is based on SharePoint LMS recertification API. The functionality is provided by the site collection feature called ELEARNINGFORCE – *REM: Certificates Expiration*. To activate the feature, go to Settings > Site Settings > Site Collection Administration > Site Collection Features:



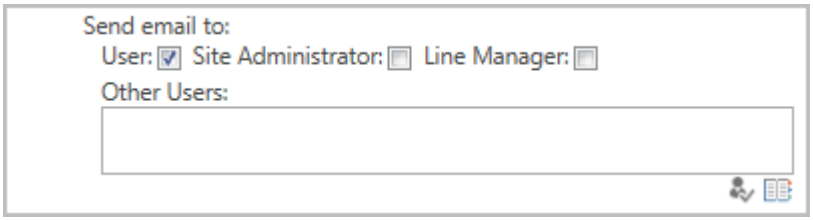
After the feature is activated, the following content is installed / changed:

- Changes to SharePoint REM Courses List:
  1) *Certificates Expiration* field. The field allows configuring expiration and email notification settings via new/edit forms of REM online courses/online classrooms;
  2) *Certificates Expiration Mode* field. The field is read only and changed by system only. The value of this field is integer number that represents mode of certificate expiration: *0=Never, 1=X Days After Completed, 2 = Expiration Date;*
  3) *Certificates Expiration Days After Completed* field. The field is read only and changed by system only. The value of this field represents number of days after completed after which certificate will be expired. The value of the field is used when expiration mode is *X Days After Completed;*
  4) *Certificates Expiration Date* field. The field is read only and change by system only. The value of this field represents particular date when course certificates must be expired.

- Changes to the Email Templates:
  1) *Certificate Is Expiring Reminder* email template. This is a new type of email template that intended to notify users about the certificate of particular user would be expired soon. The email from this template will be sent to the users according to the email settings (configured in the *Certificates Expiration* field) before certificate expiration. The default email template should contain macros *{registrations:certificate_expiration_date}* that will be replaced by particular expiration date.
     Number of days prior to send reminder is configured via *Certificates Expiration* field*:*



     If the text box is empty, the reminder will not be sent.
     If nothing is selected in *Send email to* section, the email will not be sent:



  2) *Certificate Is Expired* email template. This is a new email template intended to notify users that certificate has been expired. The email from this template will be sent to the users

according to the email settings (configured in the *Certificates Expiration* field) right after certificate expiration.
If nothing is selected in *Send email to* section, the email will not be sent.

- Changes to the Enrollment Templates:
  1) New Email templates should appear in the *Email Templates Configuration* field.
- Changes to the Registration list:
  1) New registration status *Certificate Expired*. This status is set by system only. The status is not active;
  2) *Course Completed Date* field. The field stores date of course completion (i.e. date when registration gets status Course Completed).

NOTE:	Registrations with *Course Completed* status that had been created in the version earlier than 4.1.0.16 will have empty value for this field.

3) *Reminded Of Certificate Expiration* – this is a Boolean field that stores whether the *Certificate Is Expiring Reminder* was sent for the particular registration.

The process of recertification in REM is described below:

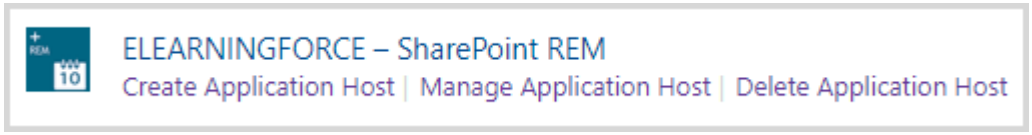
1) User is assigned *Course Completed* status – system sets *Course Completed Date*;
2) Recertification process is run by *Course Offering Daily Maintainer Job*. The job runs every day and gets registrations that require recertification. If registrations exist, the job will change their status to *Certificate Expired*;
3) The reminder emails are sent to the users according to the configured settings by *Course Offering Daily Maintainer* as well;
4) The changes in the *Certificate Expiration* field should be considered for registrations that were created before the changes.

NOTE:	Consider the following sequence of facts: *Course 1* has expiration settings: 2 days after completed User Enrolls to the *Course 1* and completes the course. Therefore, the registration status is Course Completed. His certificate should be expired after 2 days. At this day certificate expiration settings for *Course 1* is changed: 5 days after completed Result: The registration should get status *Certificate Expired* according to the new settings (5 days after completed).

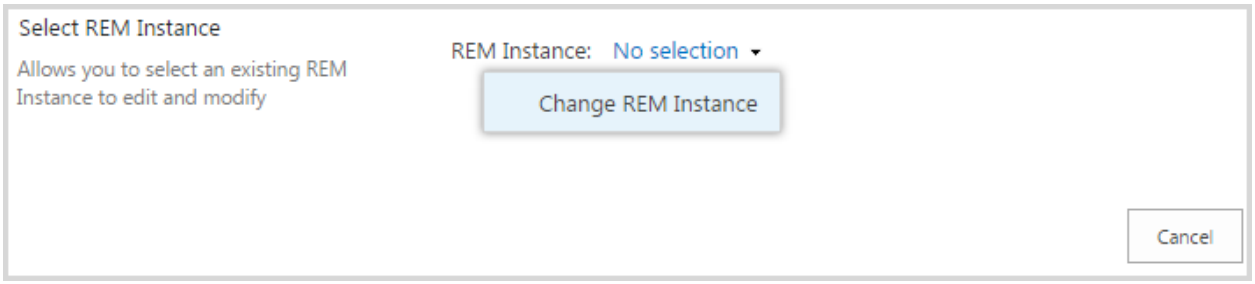
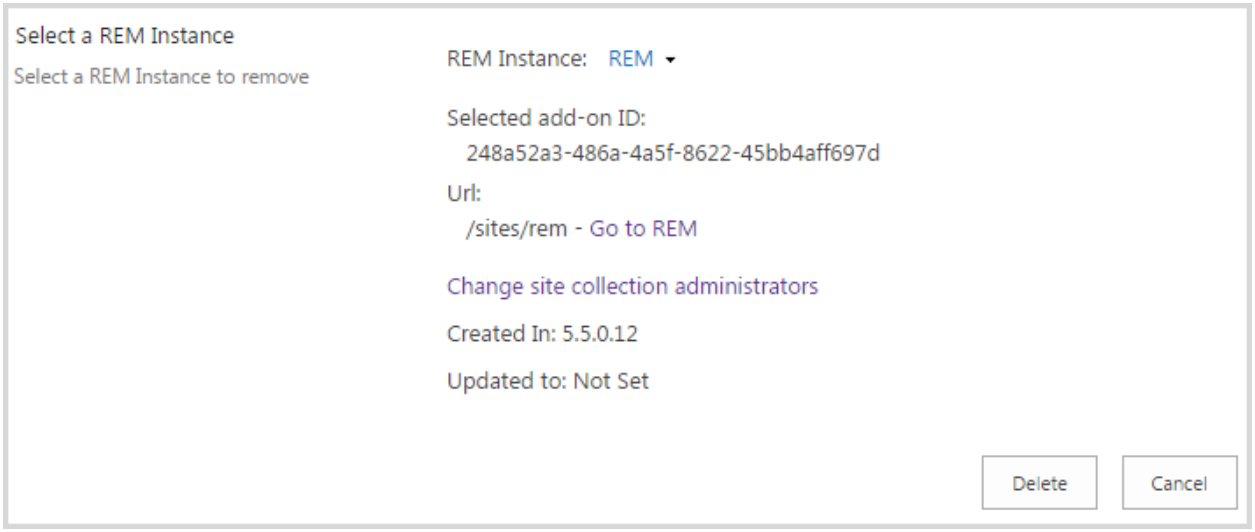
1.12 Delete REM Application Host

To delete REM site collection, do the following:

1. Go to Central Administration >Application Management> Delete Application Host:



2. In Select REM Instance section, click Change REM Site Collection:



3. In the open dialog box, select the site collection you want to delete, and then click OK. The Delete button will become visible;
4. Click Delete to remove the specified REM Site Collection. Click Cancel to discard changes and return to the Application Management page: