

Quick Start Guide



For Microsoft SharePoint Server

CONTENTS

CONTENTS	2
1. GENERAL INFORMATION.....	3
2. CREATING CCM COMPETENCIES, ROLES AND JOBS	4
3. CREATING CCM PROFILES AND PROFILE SYNCHRONIZATION	11
3.1 ACTIVATE PROFILES SYNCHRONIZATION.....	13
4. CREATING NEW LMS COURSE	15
5. SAVING COURSE AS TEMPLATE	19
6. CREATING REM COURSES.....	23
6.1 CREATING E-LEARNING AND BLENDED LEARNING TYPE COURSES.....	26
6.2 CREATING OTHER TYPE COURSES	28
7. MANAGING E-LEARNING AND BLENDED LEARNING TYPE COURSES.....	30
7.1 SETTING UP THE COURSE COMPLETION SETTINGS.....	37
8. CREATING REM COURSE OFFERINGS	40
9. CURRICULUM FUNCTIONALITY	44
10. COURSE CATALOG PAGE	48
11. ENROLLING USERS INTO COURSES.....	49
12. COMMON DASHBOARD OPERATIONS	53
12.1 MANAGER’S OPERATIONS	57
13. IMPORTING EXTERNAL CERTIFICATES.....	59
14. REPORTING CENTER	63

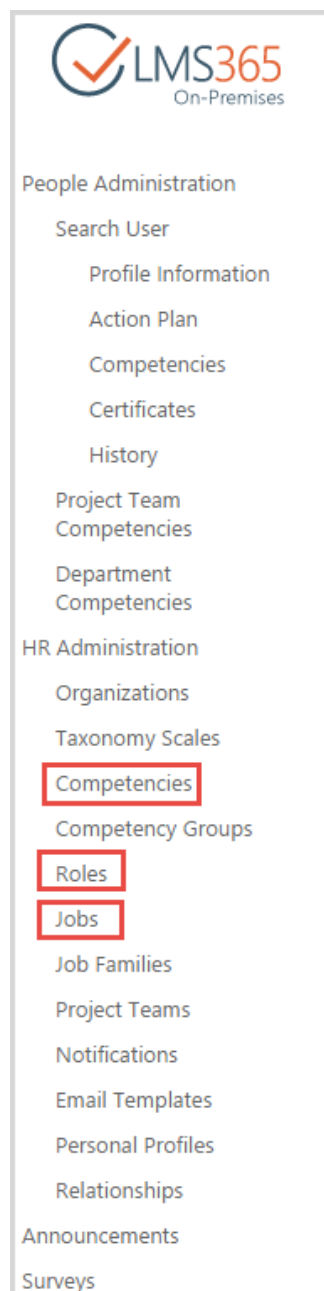
1. GENERAL INFORMATION

This Guide is intended to help LMS Administrators quickly configure LMS Suite. Here you will see the minimum information you will need to set up the system before people start using it. For more detailed information about each LMS Suite product, see full guides at <https://helpcenter.elearningforce.com>.


2. CREATING CCM COMPETENCIES, ROLES AND JOBS

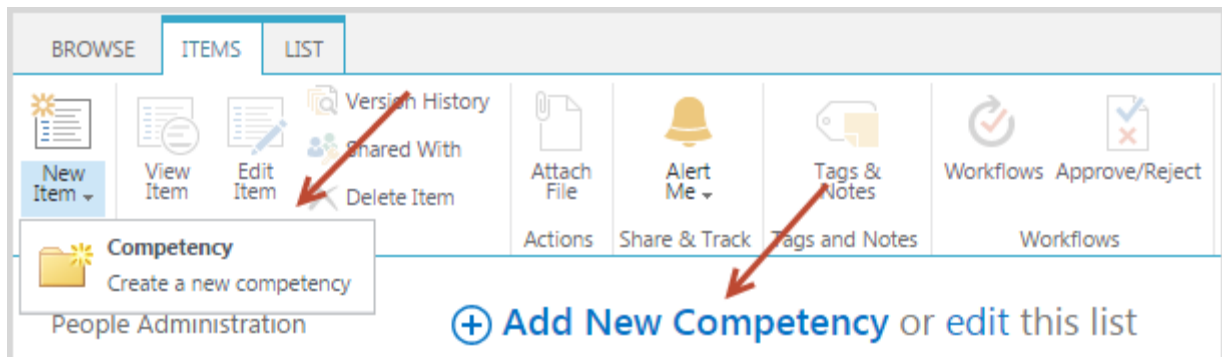
Before using the full functionality of LMS Suite users should have a Personal Profile created in CCM product. To be able to create a Personal Profile for the employee, it's necessary to create competency framework first, that is competencies, roles and jobs, and specify competencies needed to perform the jobs.

To create new competencies, roles and jobs (they need to be created in the mentioned order), go to your CCM home page, and on the left-side menu select the needed link:



To create a new **competency**, do the following:

1. Click Competencies link on the left-side menu;
2. On the ribbon menu choose Items and click New Item > Competency OR click Add New Competency button :



3. Complete open New Item form. You must specify the name of the competency and its scale configuration (taxonomy scale). Other fields are optional:

Competencies

Title *

Description






Competency Groups

Personal Competencies
 Technical Competencies

Foreign Languages


Competency Scale Configuration * Scale Template:

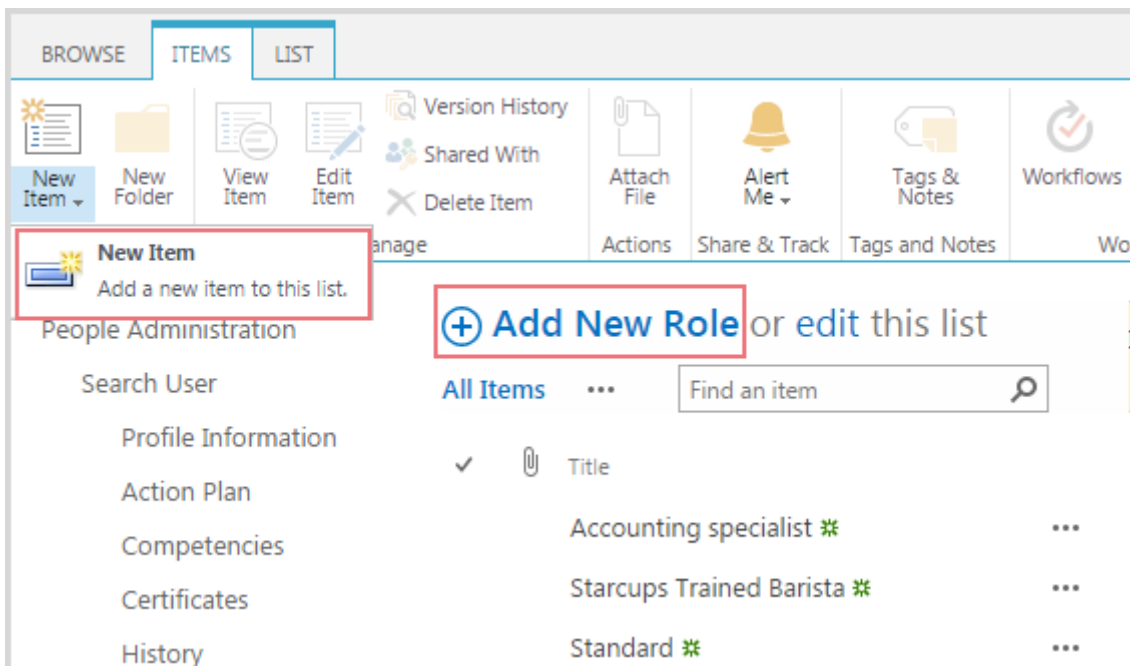
Competency levels configuration:

Level	Behavioral Indicators	
Poor-1		
Below Average-2		
Average-3		
Above Average-4		
Outstanding-5		

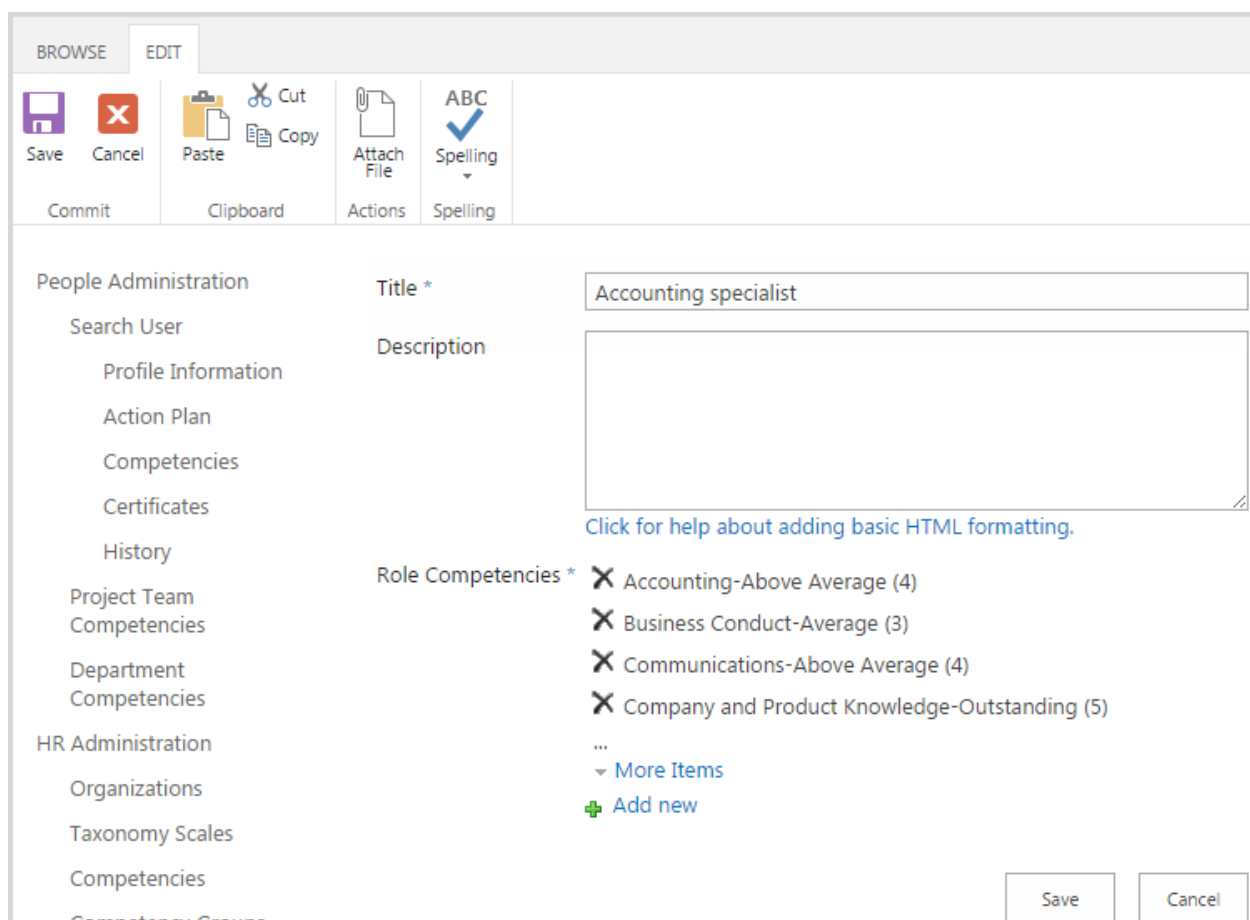
4. Click Save button to add created competency to the Competencies list.

To create a new **role**, do the following:

1. Click Roles link on the left-side menu;
2. On the ribbon menu choose New Item and click New Item OR click Add New Role button  :




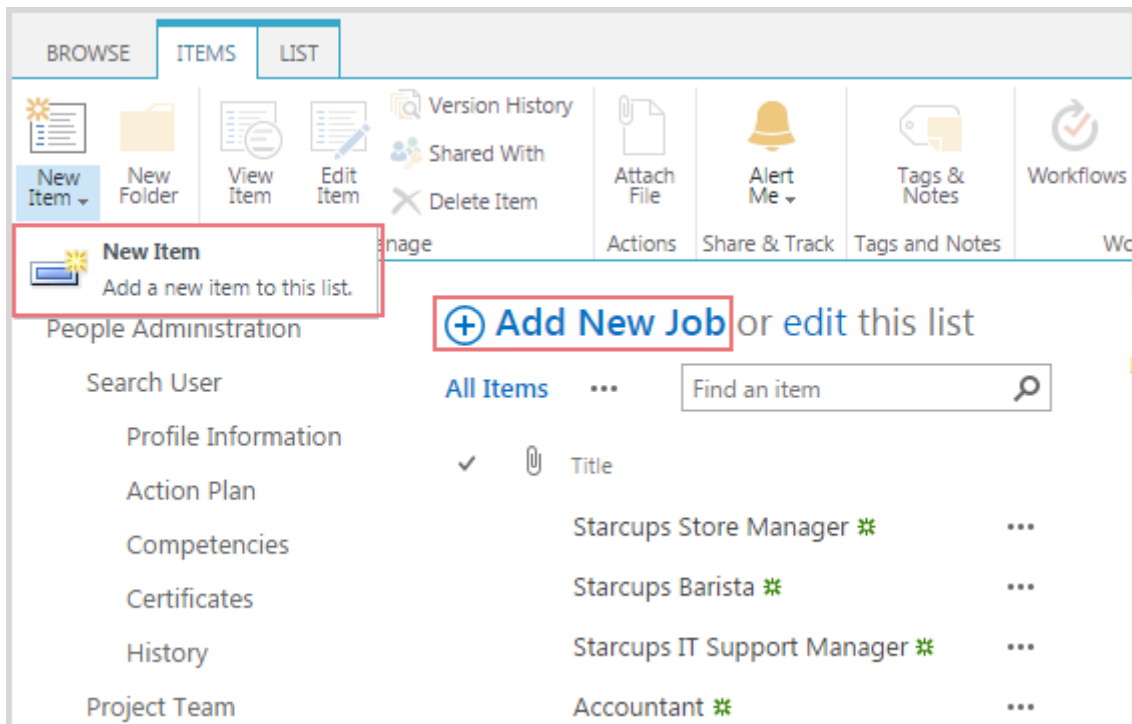
- Complete open New item form. You must specify the name of the role and select at least one competency for it (from the Competencies list). Description field is an optional field:



- Click Save button to add created role to the Roles list.

To create a new **job**, do the following:

1. Click Jobs link on the left-side menu;
2. On the ribbon menu choose New Item and click New Item OR click Add New Job button :



3. Complete open New item form. You must specify the name of the job, set priority and choose required for this job roles (from the Roles list). Other fields are optional:

Title *	<input type="text" value="Star cups Barista"/>
Description	<input type="text" value="Experienced employee"/> Click for help about adding basic HTML formatting.
Other Information	<input type="text"/> Click for help about adding basic HTML formatting.
Key Responsibilities	<input type="text" value="Make coffee"/> Click for help about adding basic HTML formatting.
Priority *	<input type="radio"/> Critical <input type="radio"/> High <input checked="" type="radio"/> Normal <input type="radio"/> Low

Next Career Steps	<input type="text" value="Starcups Store Manager;"/>
Required Roles *	<input type="text" value="Starcups Trained Barista;"/> Coffee-making-Experienced Company and Product Knowledge-Experienced Customer Focus-Experienced English - Spoken-Average
Optional Roles	<input type="text"/>
Job Family	<input type="text" value="Starcups Store Employees;"/>


4. Click Save button to add created job to the Jobs list.

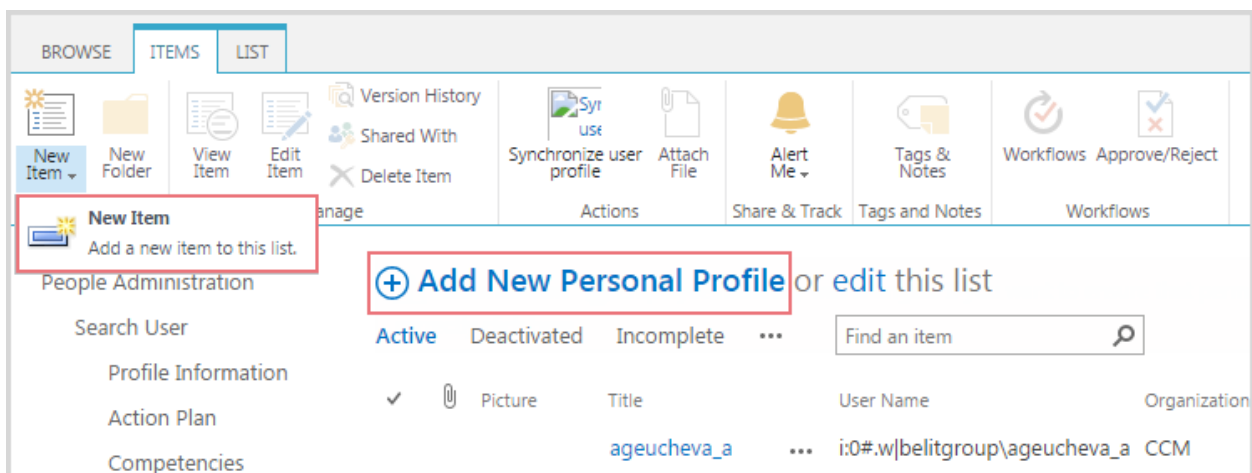
You can use callout menu actions as well as ribbon actions to view, edit and delete created items.

3. CREATING CCM PROFILES AND PROFILE SYNCHRONIZATION

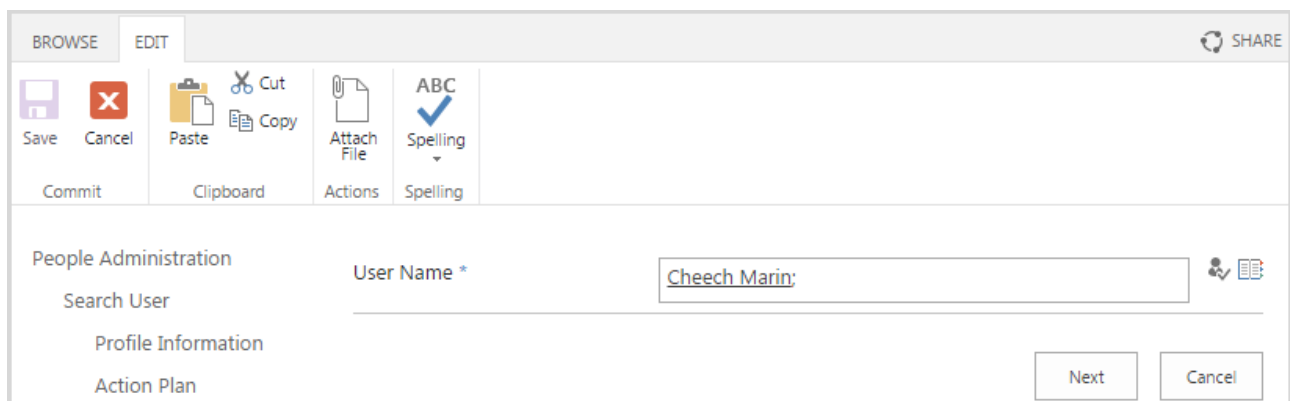
Personal Profiles are necessary to see employees in the SharePoint REM (Dashboard and Reporting Center).

To manually create the Personal Profile for the employee, do the following:


1. On the ribbon menu choose New Item and click New Item OR click Add New Personal Profile button :













2. Select the User Name (that has been set in Active Directory) of an employee for whom the Personal Profile is being created:



3. Fill in the open form. Fields marked with asterisk are required, others are optional:

 This field is related to SharePoint profile property. Go to [sharepoint user profile](#) to edit it.

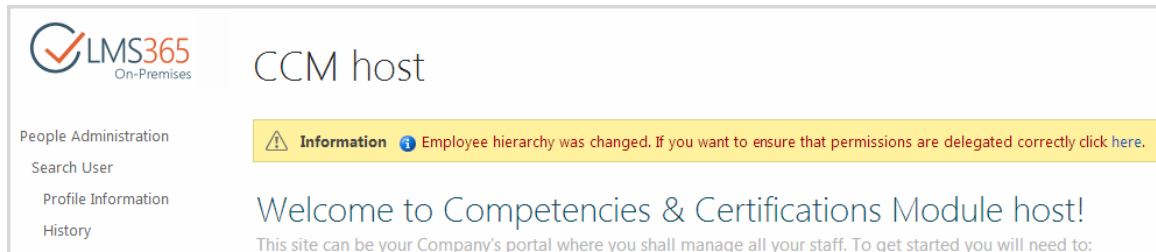
User Name *	i:0#.w example\learner 1	
Title	 John Smith	
First Name *	<input type="text" value="John"/>	
Middle Name	<input type="text"/>	
Last Name *	<input type="text" value="Smith"/>	
Organization *	CCM ▾	
Department	Sales ▾	
Picture		
Prefix	Mr. ▾	
Status	Single ▾	
Gender	Male ▾	
Jobs *	<input type="text" value="Starcups IT Support Manager;"/>	
Manager	<input type="text" value="ageucheva a;"/>	 
HR Responsible	<input type="text"/>	 
	Enter users separated with semicolons.	
Employment Start Date	<input type="text" value="3/10/2016"/>	
Employment Type	Full time ▾	
Terminated On	<input type="text"/>	
Birth Date	<input type="text"/>	
Work Phone	<input type="text"/>	
Home Phone	<input type="text"/>	
Fax	<input type="text"/>	
E-mail	 a@a.com	
Address	<input type="text"/>	
City	<input type="text"/>	
State/Province	<input type="text"/>	
ZIP/Postal code	<input type="text"/>	
Profile Status *	Active ▾	

Save

Cancel

4. Click Save button to create a Profile for the employee.

After you create a new Personal Profile, user permissions are changed. A warning message is displayed notifying about the changes in the employee hierarchy:



Permissions are updated by the EARNINGFORCE - CCM: Permissions Sync Job. It is possible to start the job immediately by clicking the link in the message, or wait until the permissions are updated during the next scheduled start of the job.

Users that you specify in Manager and HR Responsible fields are synchronized to REM SharePoint groups via timer job (EARNINGFORCE - REM: Managers synchronizer job). Remember that EARNINGFORCE – REM: Managers synchronizer job does not synchronize managers from CCM Relationships list to REM Line Managers group. They are added to Dashboard Managers group and REM Line Managers group manually. Also, remember that Managers and HR Responsibles with deactivated CCM profiles are not synchronized to REM SharePoint groups.

3.1 Activate Profiles Synchronization

SharePoint CCM product is centered on CCM user profile. In order to avoid manual work of adding CCM profiles the solution provides two ways of profiles synchronization:

1. synchronization with SharePoint User Profiles (default and recommended approach);
2. synchronization with Active Directory users.

NOTE:	A user can only have a profile in one CCM host on the same web application. Please consider that when planning your setup. We do not support a case when one user has several CCM profiles within one web application.
NOTE:	You can only use one of the two synchronizations. We recommend using synchronization with SharePoint User Profiles, as it might be possible that feature of synchronization with Active Directory users will be deprecated in future versions.

Synchronization is controlled by web application scope feature 'EARNINGFORCE – CCM: User Profile Synchronization Job' which is activated during LMS Suite installation. The feature registers 'EARNINGFORCE – CCM: User Profile Synchronization Job' timer job which is set to run daily by default.

Synchronization is disabled by default but you can change that when you create or modify CCM host site. You need to go to Central Administration > Application Management > Manage Application Host under SharePoint CCM, and edit User profile synchronization settings:

Select CCM Host

Allows you to select an existing CCM Host to edit and modify

CCM Host: Competency & Certification Module ▾

<https://demo2013.elearningforce.com/ccm>

[Change site collection administrators](#)

Created In: 2.0.0.12

Updated To: 2.2.0.30

User profile synchronization settings

Enable profile synchronization

Yes No

Synchronize profiles from

SP Profiles ▾

SP Profiles

AD

Set 'Enable profile synchronization' option to 'Yes', and select the source to synchronization profiles from, then save the changes.

If synchronization is activated it will create CCM profiles as well as update profile information. When timer job runs it checks users from:

1. Site Administrators Group;
2. Employees Group;
3. People Administrators Group.

After that, it creates missing CCM profiles and updates existing ones. If there is enough information to set all required fields, profiles are created with 'Active' status, otherwise with 'Incomplete' one.

NOTE:	If user's profile is disabled in Active Directory the system sets CCM profile of that user in Deactivated status once the timer job runs (valid for synchronization with AD users).
NOTE:	The system does not empty values after the sync if they were emptied in Active Directory or SharePoint User Profile.

4. CREATING NEW LMS COURSE

To create a new LMS course, do the following:

1. Go to your SharePoint LMS Organization, click Settings, and then Create Course;
2. Complete the following form according to the fields requirements:

Courses: New Course

Course Title and Description
Type a title and description for your new Course. The title will be displayed on each page in the Course.

Category
Course Categories used to make it easy to search Courses

Web Site Address
Please specify the URL suffix for the course and / or select the site collection you wish to publish this course in.

Additional Metadata
Specify Additional Metadata for this Course

Course Teachers
Specify teachers for this Course.

Course Learners
Specify learners for this Course.

Title:

Description:

Category: Default ▾

URL:
http://srv-fe01-sp2013 /sites/ ▾ newlms

Metadata:

Course nickname:

Active until:

User Name:

User Name:

- *Course Title and Description* – type the name and description for the course;

NOTE: When creating courses with the same names in different organizations, make sure they have different URLs. You can alternatively use managed paths to avoid this problem.

- *Category* – specify the course category;
- *Web Site Address* – specify the location for the course. The URL of organizations and the courses in organizations MUST not coincide;
- *Additional Metadata* –specify some additional meta data, type the course nickname in the corresponding field. To specify the time the course is active until, fill in the *Active Until* field;
- *Course Teachers* – specify teachers for the course. Use the Check Names and Browse buttons;
- *Course Learners* – specify learners for the course. Use the Check Names and Browse buttons;

Course Options				
Enable / Disable Course options	Display Administrator	Display Learner	Option Name	Position from Top
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Announcements	1 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Calendar	2 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Documents	3 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Discussion Board	4 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chat	5 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mailbox	6 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Links	7 ▼
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reports	8 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Learning Module	9 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Quizzes	10 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Drop Box	11 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Assignments	12 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Attendance	13 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Conference	14 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Grade Book	15 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Help	16 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Tracking	17 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Wiki Pages	18 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Seating Chart	19 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Learners & Groups	20 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Staff	21 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Roster	22 ▼
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SCORM/AICC	

- *Course Options* – check the course options you want to be present in the course;

NOTE: Disabling feature on the organization level will not delete it on the course level, i.e. tool information (including tool Web Parts) will remain.

NOTE: Disabling a tool on the course level will hide the containing data. To make the data visible, enable the tool once again. When a tool is disabled, user still can access it via a direct link.

Teachers are allowed to hide Learners and Groups, Grade Book and Documents tools (not possible in version 2.0) as well as other tools. Learners are allowed to hide the Documents and Grade Book tools (not possible in version 2.0) as well as other tools.

The Learning Module tool is visible if either all or some of its items (a SCORM, an LRM or a Learning Module) are enabled. If some item is disabled, the link will not be available on the Create page either.

Publishing

Specify publishing options

Scale Template:
Create predefined set of scales for Course Grade Book

Time Table Template:
Specify predefined timetable for the Course

Course menu style
Choose preferred course menu style

Look and Feel
Specify whether course must inherit organization look & feel or apply custom SPLMS site theme.

Language
Specify the language for this Web site collection

Quota Template
Select a predefined quota template to limit resources used for this site collection.

Grade Book Setting
Automatically add grades to Grade book for types:

Published:
 Yes No

Start Date
9/15/2016 12 AM 00

End Date
10/27/2016 12 AM 00

Scale Template:
Default (USA)
Default (UK)
DK 7-trinsskala
ECTS

Time Table Template:
<none>

Horizontal Vertical

Inherit master pages from parent organization
 Apply a custom SPLMS theme to the course
 Default (standard master page, no theme)

Select a language:
English

Select a quota template:
<none>

Assignments Quizzes SCORM/AICC Learning Module

- *Publishing* – specify whether you want to publish the course. If *Yes*, specify Start Date and End Date;
- *Scale Template* – select the grade for the course Grade Book;
- *Time Table Template* – indicate timetable for the course if any;
- *Course Menu Style* – select menu style for the course: you can select between *Vertical* and *Horizontal* menu;

NOTE: To Change the Menu Style of already existed course, select Settings > Site Settings > Look and Feel > Course Menu.

- *Look and Feel* – specify course design page;
- *Language* – specify the language for the web site collection;
- *Quota Template* – indicate quota template to limit resources used for the collection;
- *Grade Book Settings* – select Learning Object types to add results for them to the Grade Book automatically.

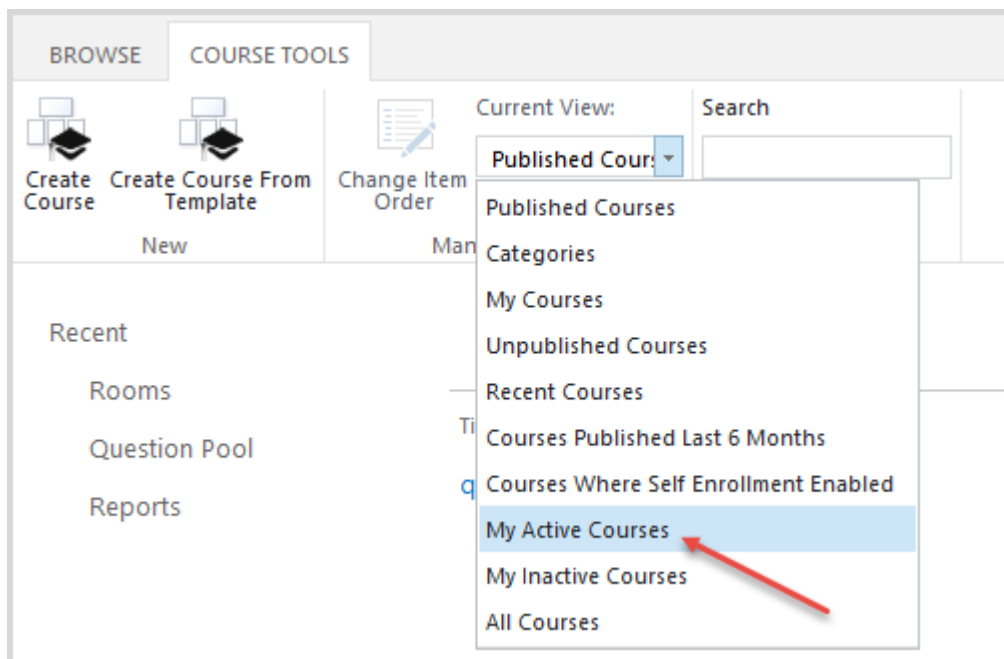
NOTE: After you create a course and before you start working with its content you must first configure all necessary groups with Learner permission level! It is required because each time a new group with Learner permission level is created on the course, the site collection permissions are reassigned for SharePoint LMS course tools.

5. SAVING COURSE AS TEMPLATE

NOTE: To use Save as Template option, user should have permissions to create new items in the Course Template Gallery organization lists.

To save a course as a template, do the following:

1. On the Organization level, go to Settings>Courses;
2. Go to Course Tools;
3. On the ribbon menu click the Current View drop-down menu and select My Active Courses view:



4. Once you see My Active Courses list, select the needed course by putting the cursor arrow on its name;
5. Click the drop-down arrow against the name of the selected course. Choose the Save as Template option from the drop-down list:

BROWSE COURSE TOOLS

Create Course Create Course From Template Change Item Order

New Manage Views Search

Current View: My Active Cours Search

Recent

Rooms

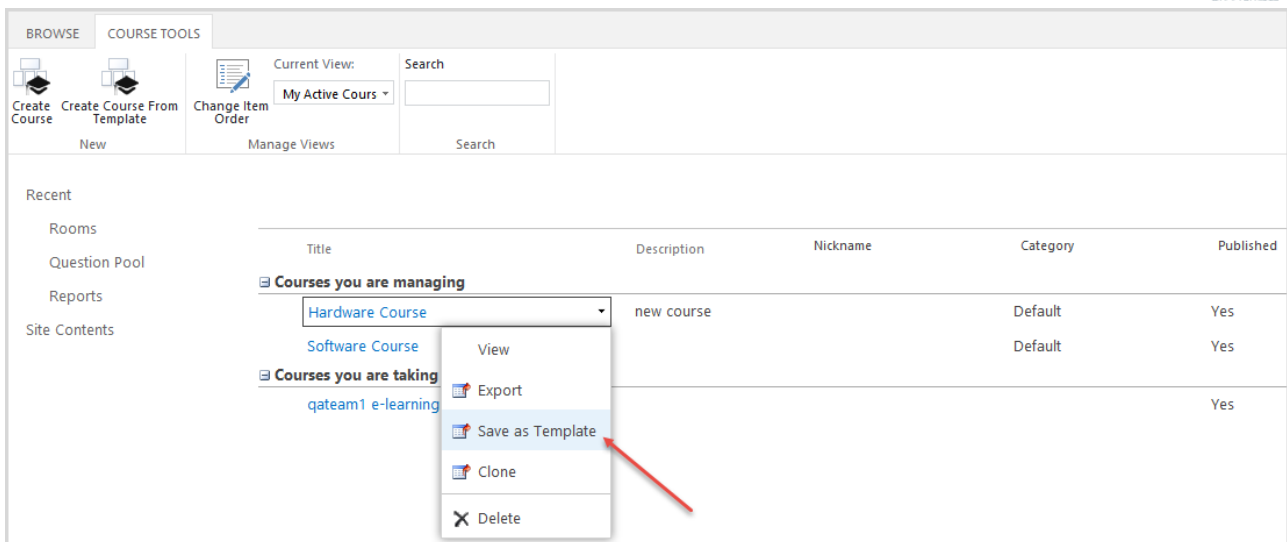
Question Pool

Reports

Site Contents

Title	Description	Nickname	Category	Published
Courses you are managing				
Hardware Course	new course		Default	Yes
Software Course			Default	Yes
Courses you are taking				
qateam1 e-learning				Yes

Hardware Course View Export Save as Template Clone Delete



6. Type the course template title. You can optionally specify another course to be saved as template (when the course has already been selected, the operation may be skipped):

Title *	<input type="text" value="Course Template"/>
Settings	<p>Course:</p> <input type="text" value="Hardware Course"/>
	<p>Title:</p> <p>Hardware Course</p>
	<p>Description:</p> <p>new course</p>
	<p>Category:</p> <p>Default</p>
	<p>URL:</p> <p>http://vmefisrvsp16pre.elearningforce.com/my/personal/rgf</p>
	<p>Options:</p> <ul style="list-style-type: none"> Announcement Documents Learning Modules Links Quizzes Drop Box Assignments Grade Book Mailbox Calendar SCORM/AICC Reports Wiki Page Library Seating Chart Staff Roster
	<p>Groups</p> <ul style="list-style-type: none"> Assistants Faculty Learners Visitors
Category	<input type="text" value="Sample Category #1"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

NOTE: Templates will contain the following items:

- Course tools (learners data such as, for example, attempts, will not be saved);
- Custom lists (if lists have specific access rights, only access rights relevant for SharePoint groups will be saved);

- SharePoint groups;
- Sub Webs;
- Navigation.

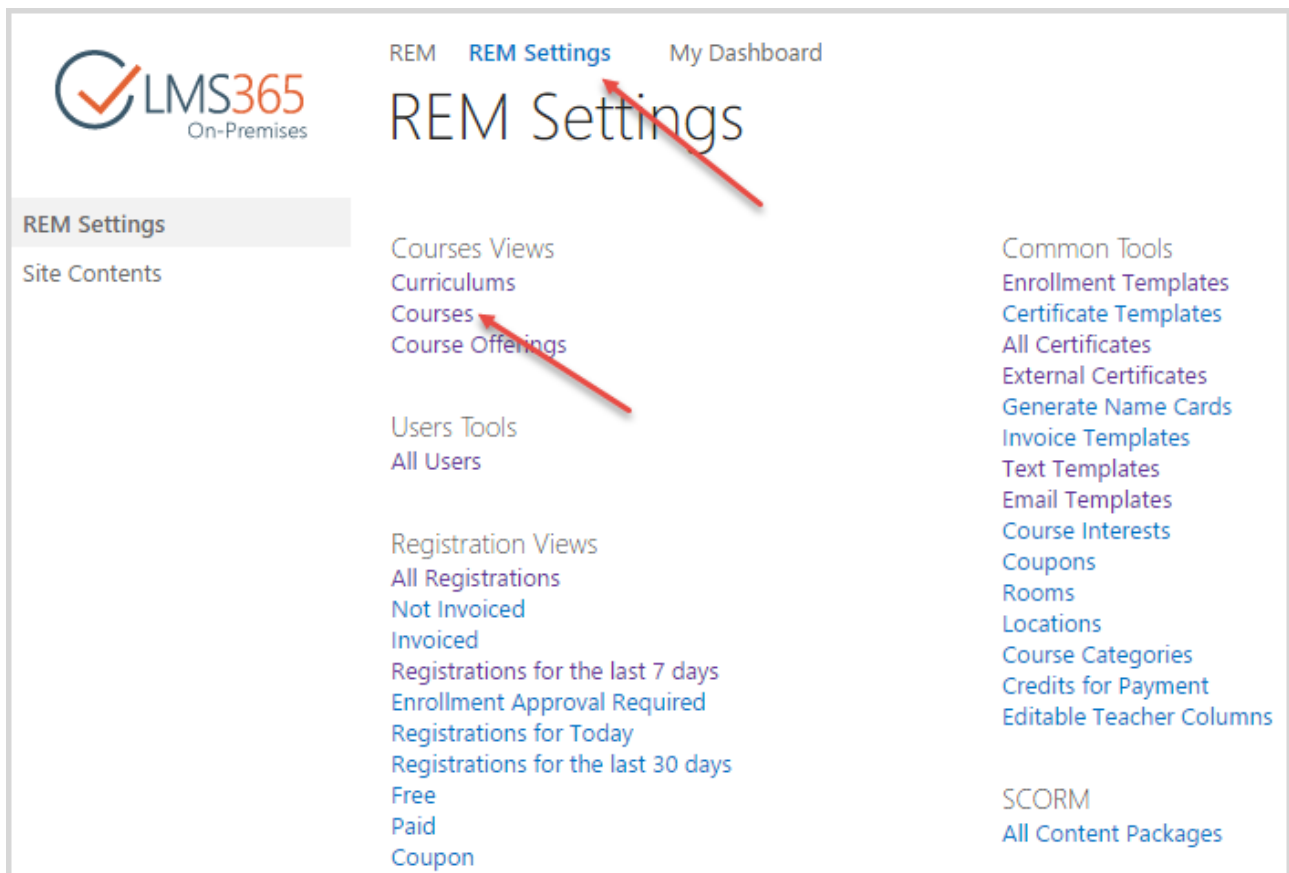
Data from Learning Module, LRM, SCORM, Quiz, Survey, Grade Book, Assignments, Drop Box, Discussion Board, Chat, Conference, Reports and Mailbox is not exported.

7. Click Save to save the changes.

6. CREATING REM COURSES

Dashboard and Reporting Center are not directly connected to LMS courses; a user needs to have a registration to course in the system in order for it to be shown in the mentioned modules. Before a user can be registered to a course it needs to be created in REM product. In this section you will be guided how to create e-Learning Courses, Blended Learning Courses, Classroom Trainings, Webinar Courses, e-Learning Content Package Courses, and Material Courses.








Courses can be created manually on your REM site or with the help of PowerShell cmdlets. To start with, go to Courses section in REM Settings:



Depending on the Course type, course creation form has some differences, but most settings are the same for all course types:

Select Course Type ✕


EDIT

 Save <small>Commit</small>	 Cancel	 Paste	 Cut  Copy	 Attach File	 ABC Spelling ▼
<small>Clipboard</small>		<small>Actions</small>		<small>Spelling</small>	

Course Title *


Short Description


Long Description

Course Category * 

Course Duration (eg. 3d 4h 12m, where d = Days, h = Hours and m = Minutes)

Published

Start Date 

End Date 

Course Image

[Select Image](#)

[Advanced Settings](#)

In the Course Title field you must specify the name of the course which will be shown in the Course Catalog and choose course category in the Course Category field (use Tags icon for this). Optionally, you can add short or long description of your course, set course duration (this is an indication only),


and choose an image to be displayed in the Course Catalog next to the course name (click Select Image link and upload your own image).

If you want to make your course available for enrolling, *do not forget to select the Published checkbox*.

Advanced settings section contains non-required fields and options (some of them can be activated by separate features in the Site Settings):


Advanced Settings

Course Certificate



Certificate Template URL (Click here to test):

Certificates Expiration

Never
 Days after completion
 Date 

Email Notification Settings



Send email reminder

days before expiration.

Send email to:

User: LMS Administrator: Line Manager:

Other Users:

Automatically revoke competencies when certificate expires

Competencies



Business Conduct-Above Average (4)

[+ Add new](#)



The selected competencies will be granted automatically to the users who complete the course.

Continued Education Units

Required For Groups

Enter user groups separated with semicolons.  

Recommended For Groups



Enter user groups separated with semicolons.  

Create Default Offering

Hide Course from Catalog

Other Info

Qualified Teachers

Enter users separated with semicolons.  

Administrators Comments

Here you can do the following:

- select Course Certificate template;

NOTE: For e-Learning and Blended Learning Courses a Certificate template cannot be selected. Instead, certificate set for the related course in SharePoint LMS is used in these REM courses.


- set Certificates Expiration. If the module is a one off and not to be repeated, simply select 'Never' option. If you would like learner to complete the course again you can select either 'Days after completion' or 'Date' options.
- configure Email Notification Settings and set days before certificate expiration to send an email notification;
- select Competencies to be granted to learners who have completed the course;
- set the amount of Training Points awarded for passing the course. The field is available only if REM: Continued Education Units feature is activated;
- select Create Default Offering option. We recommend using this option. If this option is selected, a default course offering is created automatically after course creation. If it is not selected, you will need to create it [manually](#).

6.1 Creating e-Learning and Blended Learning Type Courses


To add a new e-Learning Course to SharePoint REM, do the following:

1. Click Items > New Course on the Courses list page;
2. Select e-Learning Course Site and click Next:


Select Course Type ✕




e-Learning Course Site
Use this course type to build comprehensive online training from your existing documents, quizzes, learning paths and surveys.




Blended Learning
This course type is for blended learning, it will allow the linking of a Classroom to a Course Site.




Classroom Training
This course type is for classroom training only, the course cannot be linked to a Course Site.



Webinar Course
This course type will enable you to schedule Webinars using your existing Webinar-service to deliver interactive training utilizing audio, screen-sharing and webcam capabilities to engage directly with your learners.

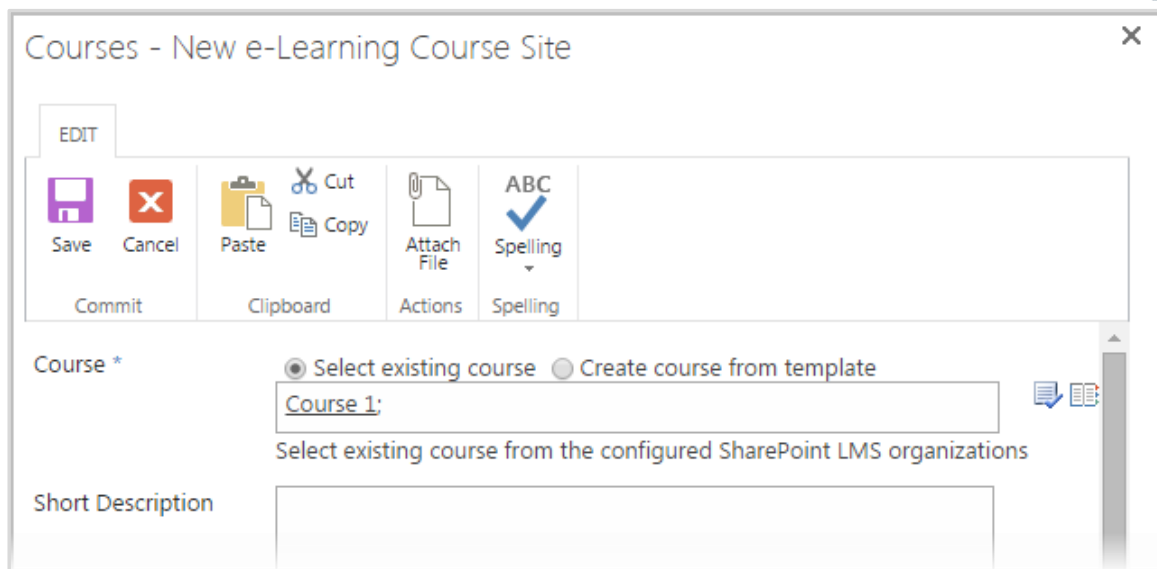


e-Learning Content Package
This course type will enable you to upload existing content packages from popular SCORM & AICC-compliant authoring tools to deliver online training in one easy step.



Material
Use this course type for document which requires an e-signature to ensure learner has acknowledged that they have read and understood the content.

- Complete the open Course creation form as described [above](#). The only difference from the standard course creation form is course selection instead of entering Course Title:



4. You can select existing course (LMS course created earlier) or create course either from blank or existing template (using course saved as a template; see [chapter 5](#) for details);
5. Click Save to add the new e-Learning Course Site.

NOTE: When you select an existing course, values for 'Short Description', 'Teachers', 'Published', 'Start Date' and 'End Date' fields are taken from the selected SharePoint LMS course.


The same logic is applied whilst **Blended Learning course** creation.

6.2 Creating Other Type Courses


To add other type courses to SharePoint REM, do the following:

1. Click Items > New Course on the Courses list page;
2. Select the needed course type and click Next:


Select Course Type ✕




e-Learning Course Site
Use this course type to build comprehensive online training from your existing documents, quizzes, learning paths and surveys.




Blended Learning
This course type is for blended learning, it will allow the linking of a Classroom to a Course Site.




Classroom Training
This course type is for classroom training only, the course cannot be linked to a Course Site.



Webinar Course
This course type will enable you to schedule Webinars using your existing Webinar-service to deliver interactive training utilizing audio, screen-sharing and webcam capabilities to engage directly with your learners.



e-Learning Content Package
This course type will enable you to upload existing content packages from popular SCORM & AICC-compliant authoring tools to deliver online training in one easy step.



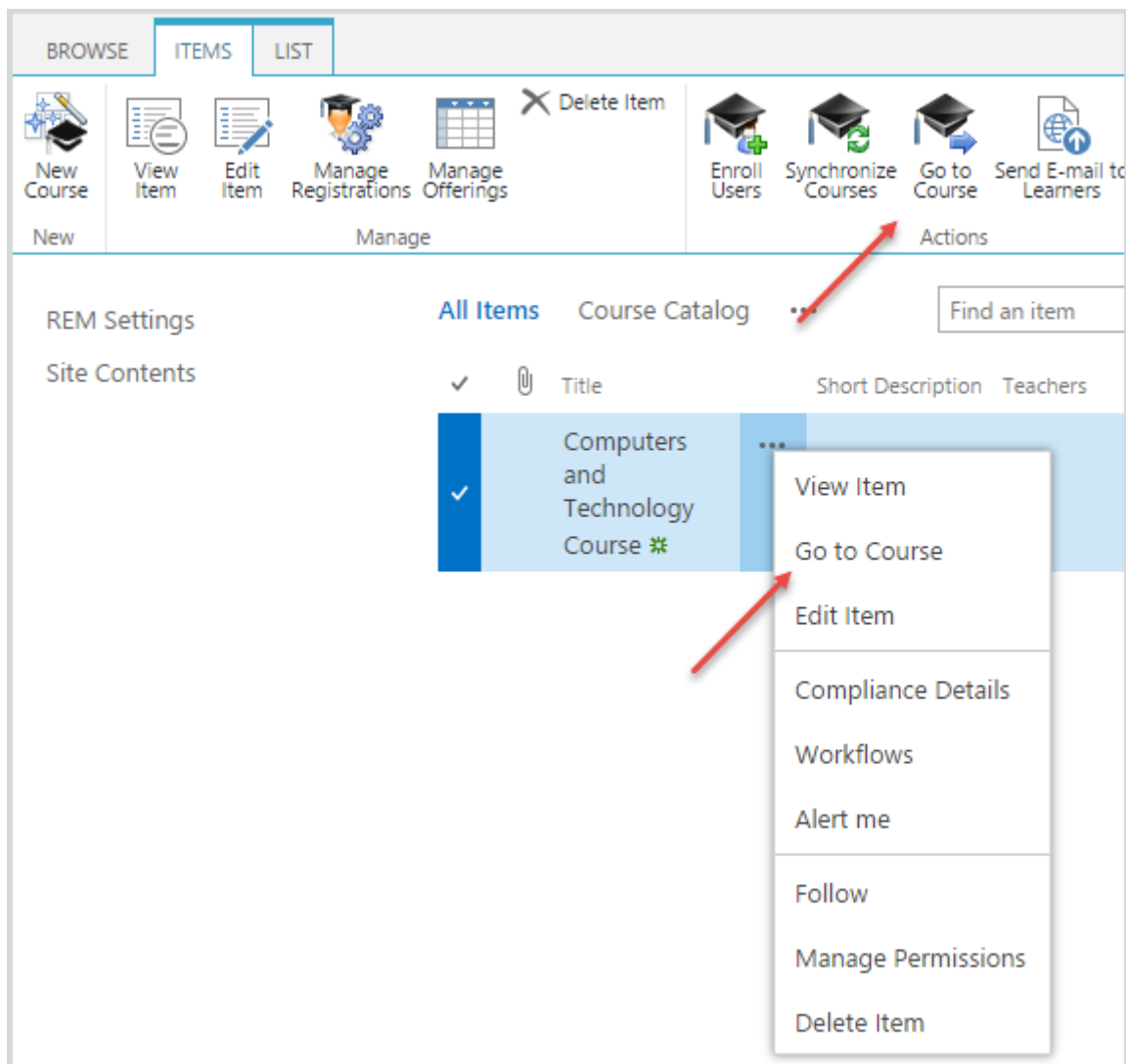
Material
Use this course type for document which requires an e-signature to ensure learner has acknowledged that they have read and understood the content.

3. Complete the open form as described [above](#).

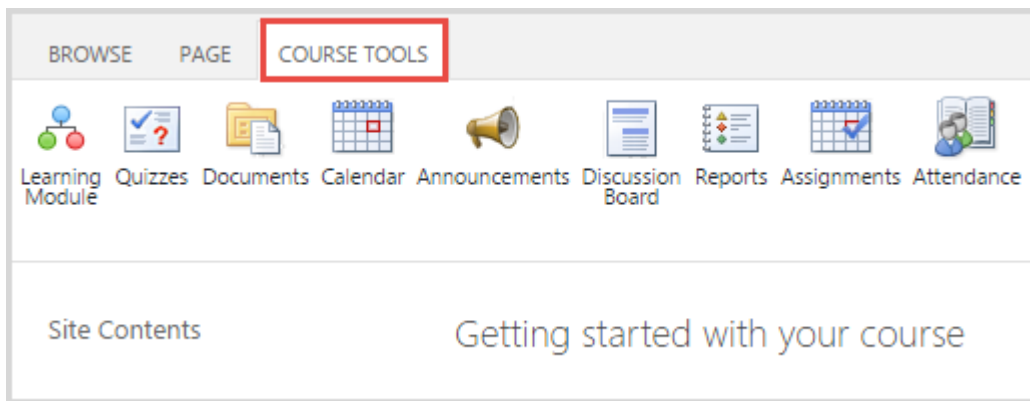
Remember that you can create Webinar, e-Learning Content Package and Material type courses only after features activation. They are as follows: EARNINGFORCE – REM: Webinar feature, EARNINGFORCE – REM: e-Learning Content Package feature, and EARNINGFORCE – REM: Course Material feature. All these features can be activated only after REM Publishing feature activation.

7. MANAGING E-LEARNING AND BLENDED LEARNING TYPE COURSES

After a new e-Learning or Blended Learning course has been created, you can start adding course content. First, you need to go to the course site. On the Courses list select the needed course, and then click Go to Course button on the ribbon or in the callout menu:



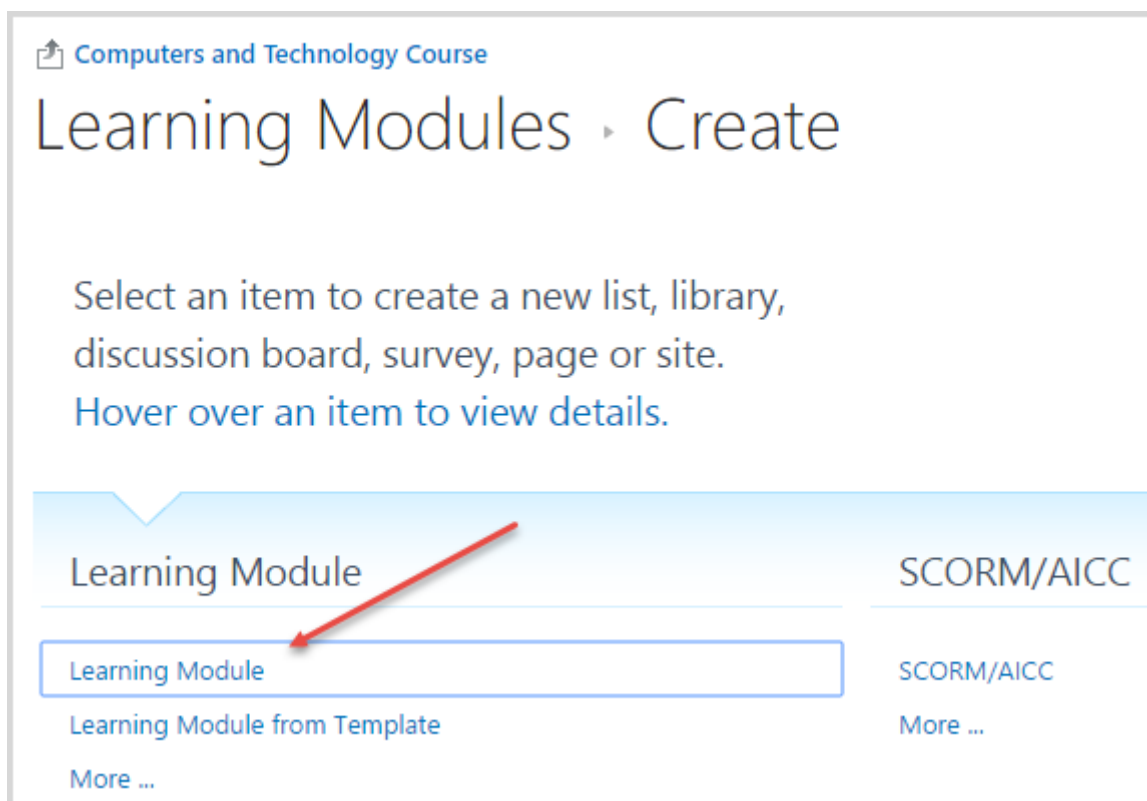
On the opened course site, click Course Tools:



Here you can create Learning Modules (including SCORMs) and Quizzes.

To create a new **Learning Module**, do the following:

1. Click Learning Module in the Course Tools menu, and then click Create button at the top of the page;
2. Select Learning Module:



3. In the open form, fill in necessary fields:

Create Learning Module

Name and Description

Type a new name as you want it to appear in headings and links throughout the site. Type a descriptive text that will help site visitors use this resource.

Name:

Introduction

Description:

Introductory Module

Show Welcome Page

Welcome Message

Now you will start the first module in this course.

This is shown to learner before beginning the Learning Module.

Completion Message

Congratulations! You have completed the Learning Module.

This is shown to learner after the Learning Module is completed.

Advanced settings:

Certification

Provide settings for setup certification process

Certify:

Yes No



Certificate Template URL ([Click here to test](#)):

Scheduling

Specify scheduling options Attention! This feature will remove all unique items permissions.

Schedule

Yes No

Start Date

 12 AM 00

End Date

 12 AM 00

OK

Cancel

We recommend you to specify only Learning Module name and left other fields with the default meanings.

4. Click OK button. The Add Item page will appear. Here you are able to add items to the learning module:

📁 Computers and Technology Course

Search this site

Introduction ▸ List Settings ▸ Add Item

Item Type
Select the type of item you want to create

Item Type:

- AICC
- Chapter
- Content
- Document
- File
- Link
- Quiz
- SCORM
- Survey
- Assignment

Item settings
Please perform settings related to this item type

AICC:

Use:

The last attempt The best attempt

E-signature
Please select your E-signature requirements to this item type

Parent node
Please select parent node

[🔍 Prerequisites](#)

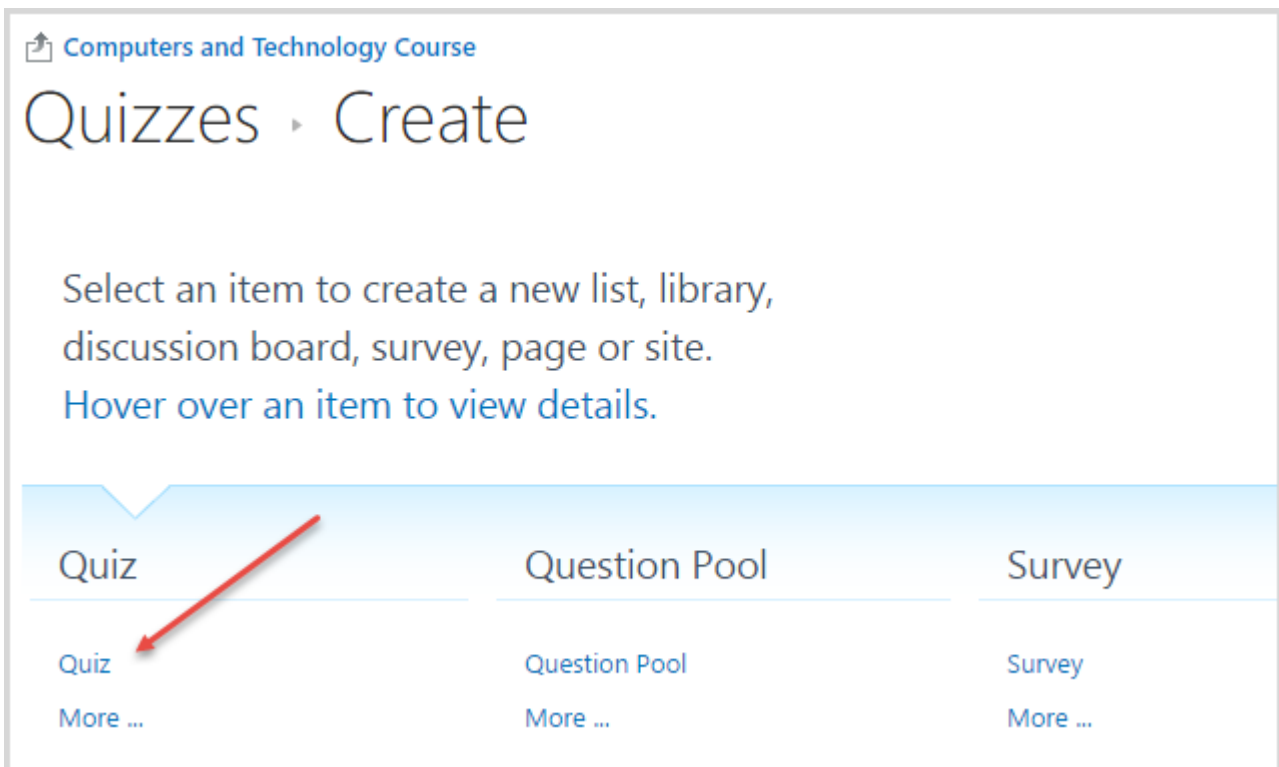
You can select from the following items:

- AICC (must be created in the Learning Modules section first);
- Chapter (allows dividing a learning module into chapters);
- Content (you can use embedded content editor to create content);
- Document (select from the documents created in the Documents section of the course);
- File (you can upload the needed file here);

- Link (select from the links that have been created in the Links section of the course);
- Quiz (must be created in the Quizzes section first);
- SCORM (must be created in the Learning Modules section first);
- Survey (must be created in the Quizzes section first; it can be used to get some feedback on the course materials);
- Assignment (must be created in the Assignments section first).

To create a new **Quiz**, do the following:

1. Click Quizzes in the Course Tools menu, and then click Create button at the top of the page;
2. Select Quiz:



Computers and Technology Course

Quizzes Create

Select an item to create a new list, library, discussion board, survey, page or site.
Hover over an item to view details.

Quiz	Question Pool	Survey
Quiz	Question Pool	Survey
More ...	More ...	More ...

3. In the open form, fill in necessary fields:

Create Quiz

Name and Description

Type a new name as you want it to appear in headings and links throughout the site. Type a descriptive text that will help site visitors use this resource.

Name:

Description:

Navigation:

Specify whether a link to this resource appears in the Quick Launch.

Display this resource on the Quick Launch?

Yes No

Scale settings

Provide settings for setup scale for this resource

Use:

Scale Set: **Default (UK)** ▾

Numerical

Min: Max:

Display options:

Add to default view
 Show grade
 Show percentage
 Combined view

Passing Grade:

Passing Value:

%

We recommend specifying Quiz name and setting numerical scale settings. Leave other fields with the default meanings. Click OK button to move to the Add Question page:

New Quiz ▸ List Settings ▸ Add Question

Question Name and Type

Type a name for this question, and select the type of question you want to create

Question name:

Question Type:

- Drop Down Ordering
- Free Text Answer
- True or False
- Multiple Choice
- Short Answer
- Multiple Answer
- Hot Spot
- Matching
- Gap Fill
- Calculated
- Page separator

Question additional settings

Please enter your detailed question here if required

Question:

Answers:

Points:

Mandatory

▸ [Feedback settings](#)

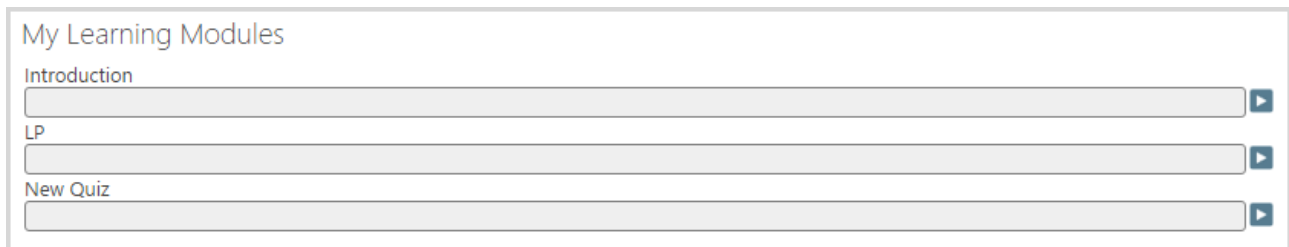
▸ [Hint Settings](#)

There are several question types available for adding, and you can use a variety of them within one quiz. First, you need to specify the name of the question, and then question type:

- Drop Down Ordering – is a question type that requires arranging items in the correct order;
- Free Text Answer – is a question type that requires typing answers into an empty text field;
- True or False – is a question type that requires selecting whether the statement entered in the question field is true or false;

- Multiple Choice – is a question type that gives the learner an option to select the correct answer from a list of possible answers;
 - Short Answer – is a question type represented as a question and an empty text field where learners should type the correct answer;
 - Multiple Answer – is a question type that gives learner an option to select several correct answers from a list of possible answers;
 - Hot Spot – is a question type represented as a question and an image. Learners should move the pointer to a certain area (spot) on the image and click it (if they click within the right area, the question is considered to be answered correctly);
 - Matching – is a question type that requires matching questions with the correct answers;
 - Gap Fill – is a question type that requires filling gaps from a list of possible choices in the drop-down menu;
 - Calculated – is a question type that offers a way to create individual numerical questions by the use of wildcards (i.e. {x}, {y}) that are substituted with random values when the quiz is taken. You can type in selected variables (e.g. {x}, {y}) in Question field while typing your question;
 - Page Separator – you may insert a page separator to sort questions by type, i.e. to create question groups.
4. After all questions have been added, click OK button to create a new Quiz.

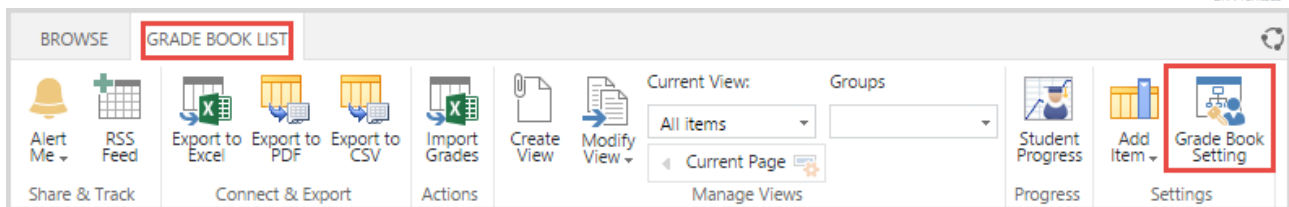
Now all created Learning Modules and Quizzes will be added to the Learning Modules web part:



7.1 Setting up the Course Completion Settings

To configure the course completion settings, do the following:

1. On the needed course site, go to the Course Tools > Grade Book > Grade Book List > Grade Book Setting:



2. Select Setup course completing settings and fill the following form:

Grade Book ▸ List Settings ▸ Setup course completing settings ⓘ

Column and percentage
Specify the column and percentage to calculate the course completing. You can specify more than one column to complete course upon completion of any of them.

- Course Essay ≥ 100 % [Edit](#) [Delete](#)
- Learning Path 1 ≥ 90 % [Or](#)
[Edit](#) [Delete](#)
- Learning Path 2 ≥ 90 % [And](#)
[Edit](#) [Delete](#)

Column name: SCORM 1 ▾ ≥ 100 % And Or [+ Add](#)

Send E-Mail
Use this option to send e-mail to your users. You can personalize the message that is sent.

Send e-mail to users

Subject:

Personal Message:

Add link to the certificate below your personal message

In the 'Column name' box select the title of the needed learning item from the drop-down menu, and then enter the pass mark percentage in the box next to the 'Column name' box. Select and/or radio buttons to set all (and radio button) or only one (or radio button condition obligatory for the course completion. Once you have added all the needed items, click OK button.

3. Assure you have also set up the course certificate; otherwise, course completion will not work. To set up the course certificate, click Setup Certificate Template in the Grade Book Setting section:

Grade Book ▸ List Settings

List Information

Name: Grade Book
Web Address: <http://srv-fe01-sp2013/sites/ger/GradeBook/AllItems.aspx>
Description:

General Settings

- ▣ [Title, description and navigation](#)
- ▣ [Versioning settings](#)
- ▣ Last learners check: 10/24/2016 5:23:44 PM
- ▣ [Check learners now](#)

Communications

- ▣ [RSS settings](#)

Certification

- ▣ Certificate template missing
- ▣ [Setup Certificate Template](#)
- ▣ [Setup course completing settings](#)




In the following form, specify the URL of the certificate template you want to use (or use Browse button to select certificate template for the course) and click OK button:

Grade Book ▸ List Settings ▸ Setup Certificate Template

Certificate Template Link

Specify URL of the certificate template you want to use.


 Certificate Template URL ([Click here to test](#)):

4. Now when a learner scores the number of points necessary to complete the course, he will be marked as a learner who completed the course in the Grade Book:

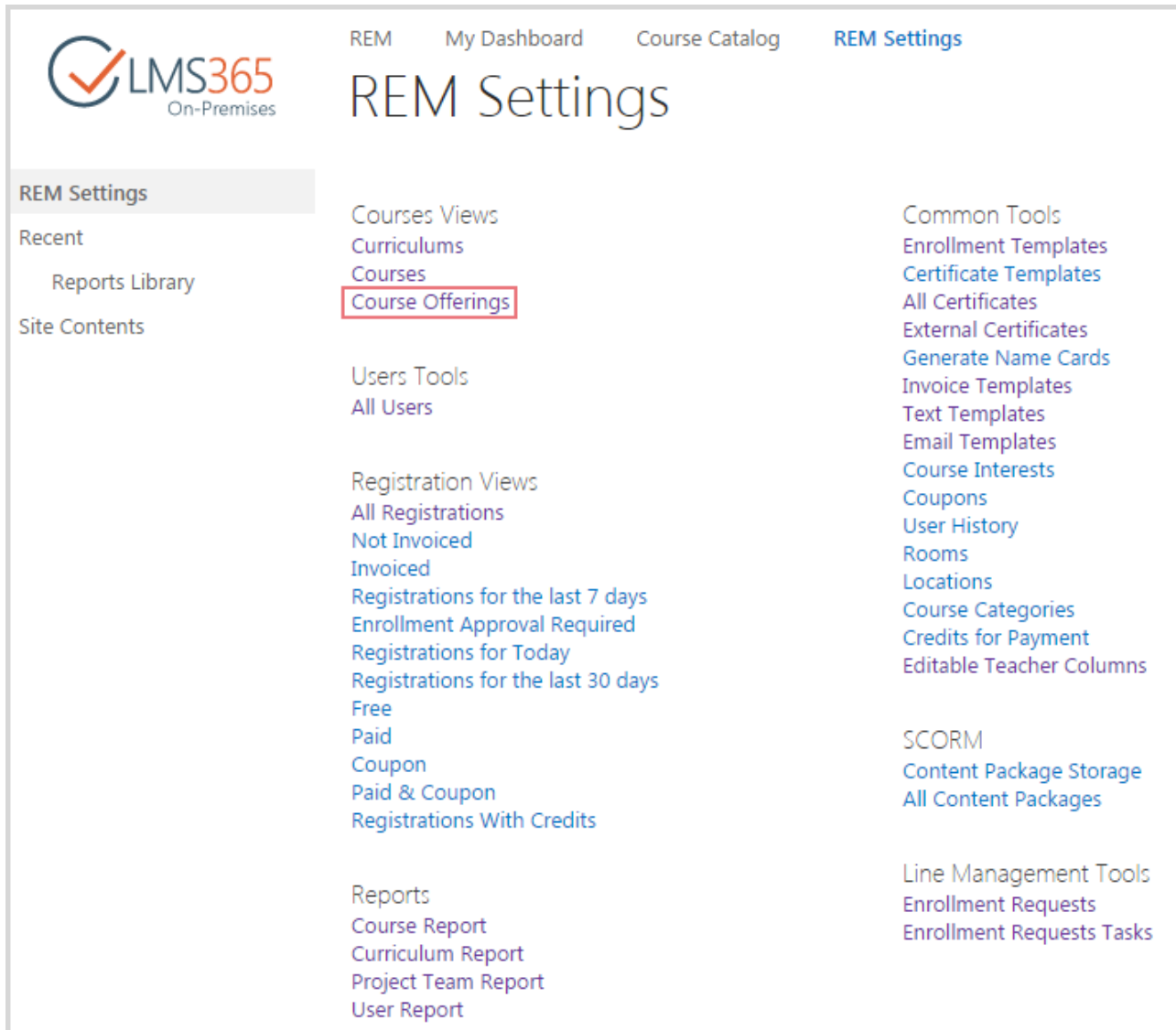
Grade Book

Learner	Certificate Issued	essay	Company's Principles	Introductory Quiz
<input type="checkbox"/> Learner 1			A*	A
<input type="checkbox"/> Learner 10.	✓	A*	A*	



8. CREATING REM COURSE OFFERINGS

SharePoint REM Course Offering represents a certain offer of the existing SharePoint REM Course. Each Course Offering can be intended for different Locations and can have different access or registration periods. First users need to create a SharePoint REM Course and only then create a Course Offering:

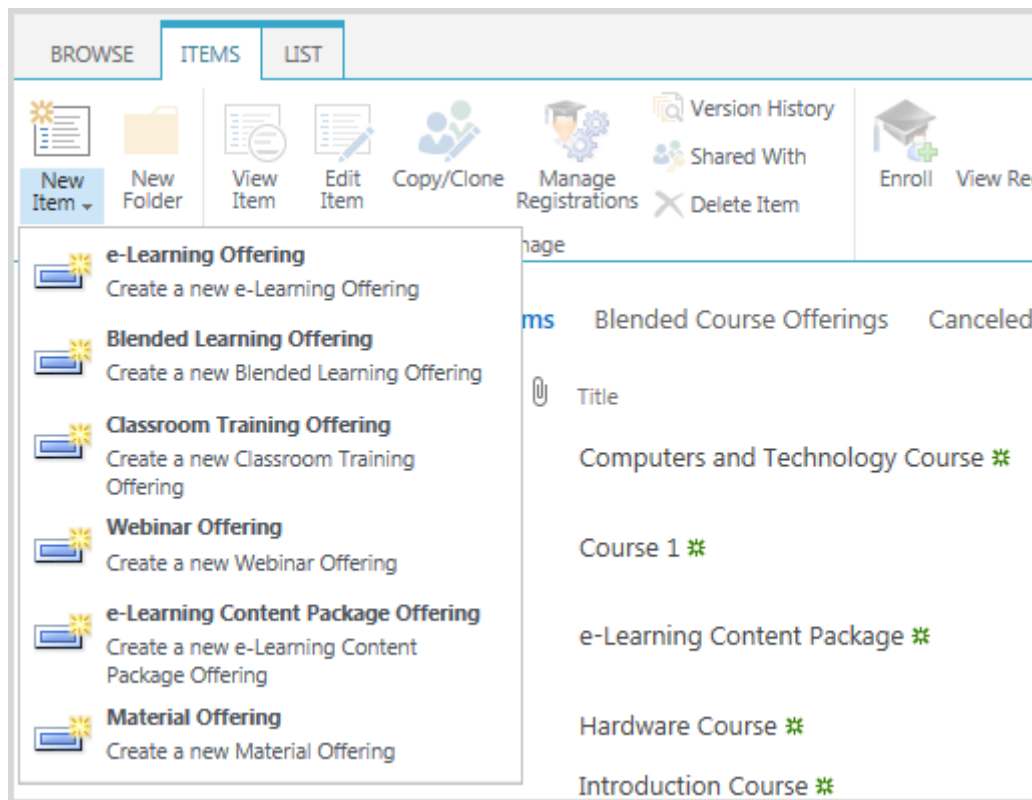


The screenshot shows the LMS365 On-Premises interface. At the top, there are navigation links: REM, My Dashboard, Course Catalog, and REM Settings. The main heading is 'REM Settings'. On the left, there is a sidebar with 'REM Settings' selected, and below it, 'Recent', 'Reports Library', and 'Site Contents'. The main content area is divided into several sections:

- Courses Views:** Curriculums, Courses, **Course Offerings** (highlighted with a red box), Users Tools, All Users.
- Registration Views:** All Registrations, Not Invoiced, Invoiced, Registrations for the last 7 days, Enrollment Approval Required, Registrations for Today, Registrations for the last 30 days, Free, Paid, Coupon, Paid & Coupon, Registrations With Credits.
- Reports:** Course Report, Curriculum Report, Project Team Report, User Report.
- Common Tools:** Enrollment Templates, Certificate Templates, All Certificates, External Certificates, Generate Name Cards, Invoice Templates, Text Templates, Email Templates, Course Interests, Coupons, User History, Rooms, Locations, Course Categories, Credits for Payment, Editable Teacher Columns.
- SCORM:** Content Package Storage, All Content Packages.
- Line Management Tools:** Enrollment Requests, Enrollment Requests Tasks.

To add a new course offering, do the following:

1. Go to Course Offerings section;
2. On the ribbon menu go to Items > New Item;
3. Select type of course to which you want to create a Course Offering:





4. Complete the open form (the fields marked with asterisk (*) are required):


Course Offerings - New Item



✕


EDIT




 Save
Commit


 Cancel


 Paste


 Cut

 Copy


 Attach
 File


 ABC

 Spelling
Spelling

Course * 🔍 📄

🔗 SharePoint LMS Learner Group

Enrollment Template * Free Course with Auto Approval View Template

Title	Free Course with Auto Approval
Payment Type	Free
Language	English (United States)
Activate Waiting List	No
Approval Type	Automatic

Access Period * From 📅 To 📅

Registration Period * Date Range

From 📅 To 📅

No Limit

🔗 [Advanced Settings](#)

- *Course* – type the name of the SharePoint REM Course you want to enroll learners to, and then click the Check Names (🔍) button OR use the Browse (📄) button to find the course; this can be any course from the configured SharePoint LMS organization;

NOTE: You can create unlimited number of Course Offerings associated with a certain SharePoint REM Course; the only condition is to differentiate Course Offerings by Access Period.

- *Enrollment Template* – specify the template from the drop-down list (if you want to create a custom enrollment template, see more information in subchapter 4.1.1.1 of [LMS365 On-Premises REM User Guide](#));
- *Access Period* – specify the dates when learners can access the course (i.e. when the course is held). Access Start Date is required Access End Date is optional;
- *Registration Period* – specify the dates when learners can enroll in the course;

Advanced settings are optional:

Advanced Settings

Time Zone: (UTC+03:00) Baghdad

Minimum number of Learners: 10

Maximum number of Learners: 30

Due Date:

 Never

 Days after enrollment 10

 Date: [] [] 12 AM [] 00

Auto Recertification:

Days Prior to Certificate Expiration: 3

Auto enroll user in course offering X days before user's certificate is about to expire

Course Offering Status: Active

Groups To Enroll: []

Enter user groups separated with semicolons.

Required For Groups: []

Enter user groups separated with semicolons.

Recommended For Groups: []

Enter user groups separated with semicolons.

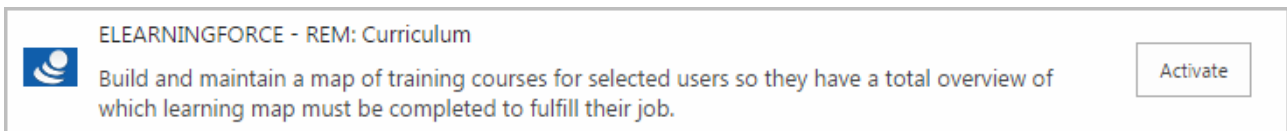
Here you can specify course time zone; set minimum number of learners for the course to be started, as well as the maximal number of learners that can be enrolled in this course (If this number exceeds, those learners will be added in the waiting list); specify the name of the instructors for this course; specify the Due Date for the course (never; days after enrollment; date options are available); enable auto recertification option and set number of days before certificate expiration on which user will be auto enrolled in course offering (remember that you need to activate EARNINGFORCE – REM: Certificates Expiration feature to be able to use this option). We recommend leaving other fields with the default meanings.

5. Click Save to add the new Course Offering.

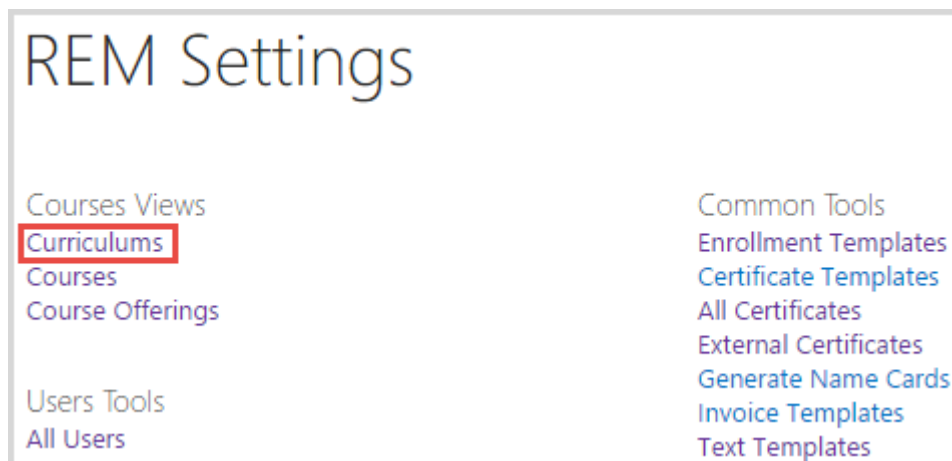
Depending on Course Type, Course Offering creation form has some different fields. See subchapter [4.1.10.1 of LMS365 On-Premises REM User Guide](#) for details.

9. CURRICULUM FUNCTIONALITY


Curriculum functionality allows creating and managing maps of training courses for selected learners to give them a total overview of which learning map must be completed to fulfill their job. To be able to use this functionality, you need to activate the EARNINGFORCE – REM: Curriculum feature (go to Settings > Site Settings > Manage site features):

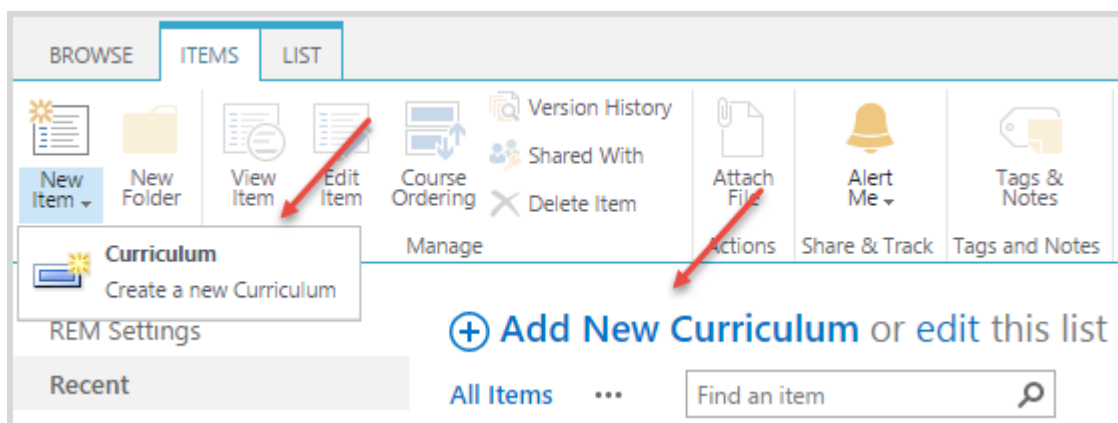


After feature activation, Curriculums functionality is available on the REM Settings page:



To add a new Curriculum, do the following:


1. Go to Curriculums section on the REM Settings page;
2. On the ribbon menu go to Items > New Item or click Add New Curriculum button  :





3. Fill in the open form:



Curriculums - New Item
✕


EDIT


 Save
Commit


 Cancel


 Paste


 Cut

 Copy


 Spelling
ABC
 Spelling

Name *

Description

Courses *

Published

[⊕ Targeting Settings](#)
[⊕ Email Templates Configuration](#)
[⊕ Advanced Settings](#)

Specify the name of the curriculum, select courses (using course picker) that will be included in the curriculum, and select Published checkbox in order to show this curriculum in the Dashboard.

Use targeting settings to select jobs/roles/target audience to which the curriculum will be assigned (use special pickers to do this). At least one target must be selected:

Targeting Settings

Users will see this curriculum if they have selected jobs, roles or target audiences.

Jobs:

Roles:

Target Audiences:

NOTE: Curriculum supports only its own Targeting Settings. It means that targeting settings set during the course creation for the courses included in the curriculum (Required for Groups, Recommended for Groups fields) are not applicable to the curriculum.

You can also use advanced settings to set curriculum prerequisites, set curriculum due date and certificate for the completion of the curriculum:

Advanced Settings

Curriculum Prerequisites

Select curriculums that should be passed by a learner before this curriculum becomes available.

Due Date

Never

Days after enrollment

Date

Email Notification Settings

Send email reminder prior to the due date.

Certificate

Certificate Template URL (Click here to test):

Certificates Expiration

Never

Days after completion

Date

Email Notification Settings

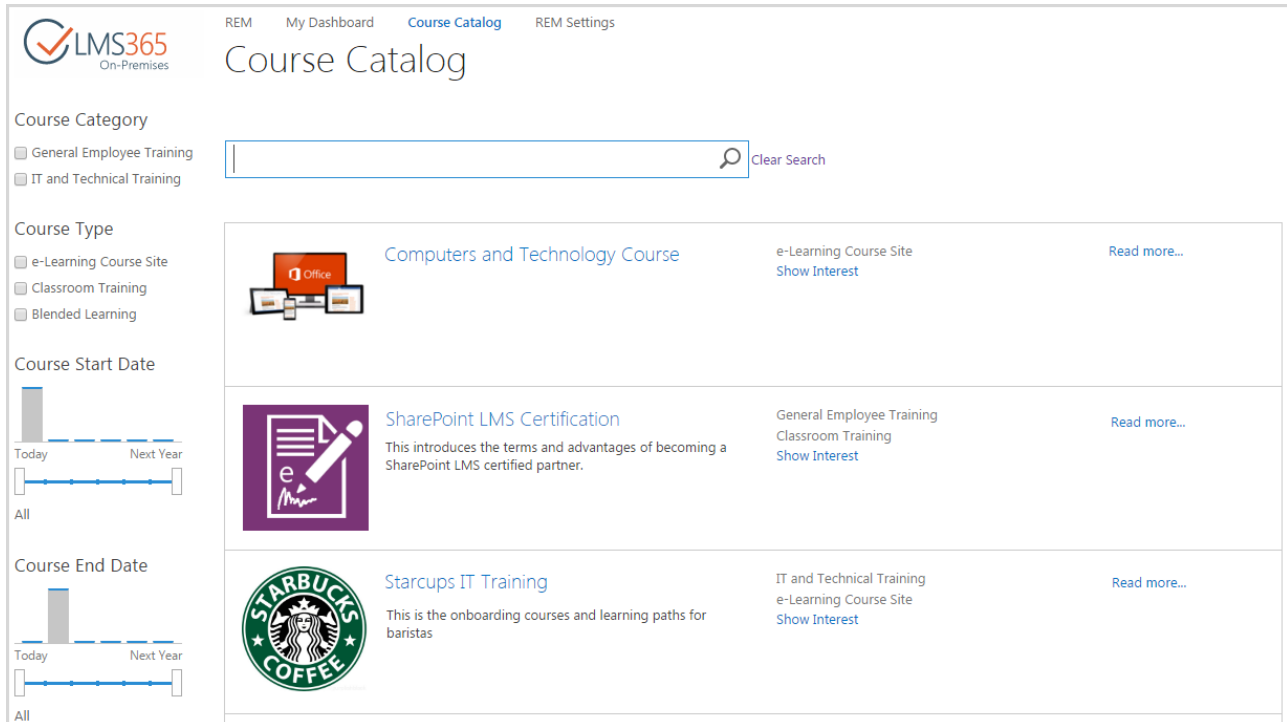
Send email reminder days before expiration.

Automatically revoke competencies when certificate expires

- Click Save button to create a new curriculum. Now learners to whom this curriculum is assigned will see it in the Curriculum tab of Dashboard's My Training Overview.

10. COURSE CATALOG PAGE

Course Catalog Page allows users to search and view courses available for enrollment, apply various search filters and navigate to the course details or registration details pages:



The screenshot shows the LMS365 Course Catalog interface. At the top, there are navigation links for REM, My Dashboard, Course Catalog, and REM Settings. The main heading is "Course Catalog".

Course Category: Includes checkboxes for "General Employee Training" and "IT and Technical Training". A search bar with a magnifying glass icon and a "Clear Search" link is present.

Course Type: Includes checkboxes for "e-Learning Course Site", "Classroom Training", and "Blended Learning".

Course Start Date: A bar chart shows activity from "Today" to "Next Year", with an "All" option below.

Course End Date: A bar chart shows activity from "Today" to "Next Year", with an "All" option below.

Course Listings:

- Computers and Technology Course:** Includes an Office logo icon. Category: e-Learning Course Site. Action: Show Interest. Link: Read more...
- SharePoint LMS Certification:** Includes a document icon. Description: "This introduces the terms and advantages of becoming a SharePoint LMS certified partner." Category: General Employee Training, Classroom Training. Action: Show Interest. Link: Read more...
- Starbucks IT Training:** Includes the Starbucks logo icon. Description: "This is the onboarding courses and learning paths for baristas." Category: IT and Technical Training, e-Learning Course Site. Action: Show Interest. Link: Read more...

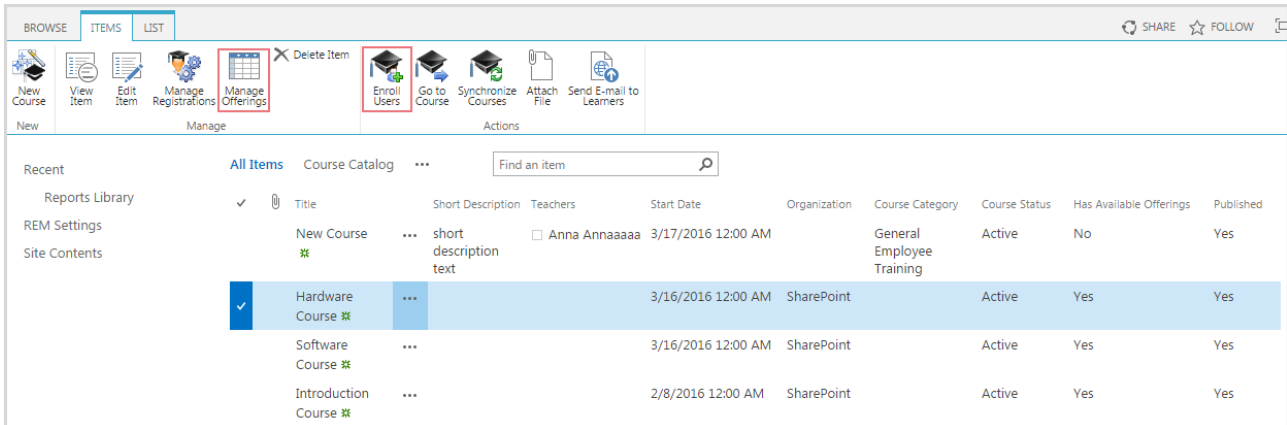
Remember that to see courses in the Course Catalog, you must start crawl process (it is necessary to index all content of the Course Catalog). See subchapter 1.6 of [LMS365 On-Premises REM Administration Guide](#) for details.

From this page, users can go to the Course Details page (by clicking 'Read more...' link) and from that page enroll themselves in courses, and managers can enroll users as well as described in the [chapter 11](#).

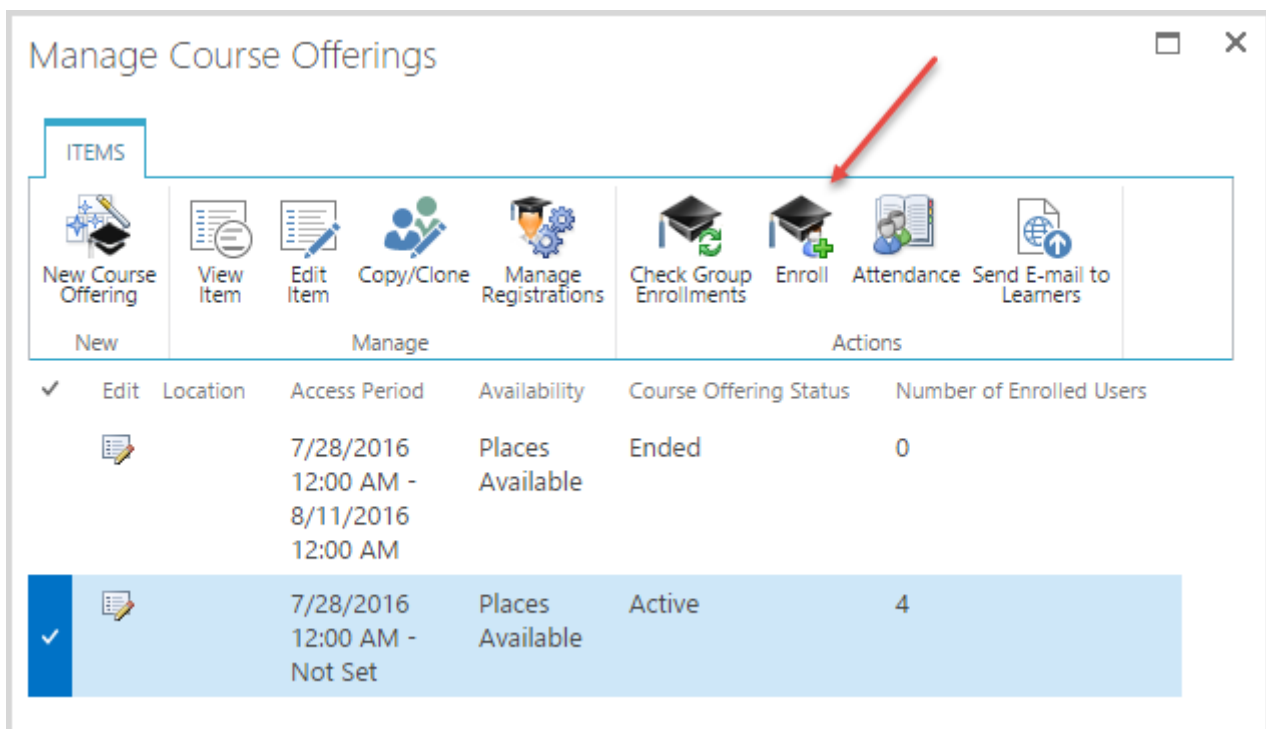
11. ENROLLING USERS INTO COURSES

You can enroll users from Courses list page, from Course Offerings list page, or from Course Catalog page.

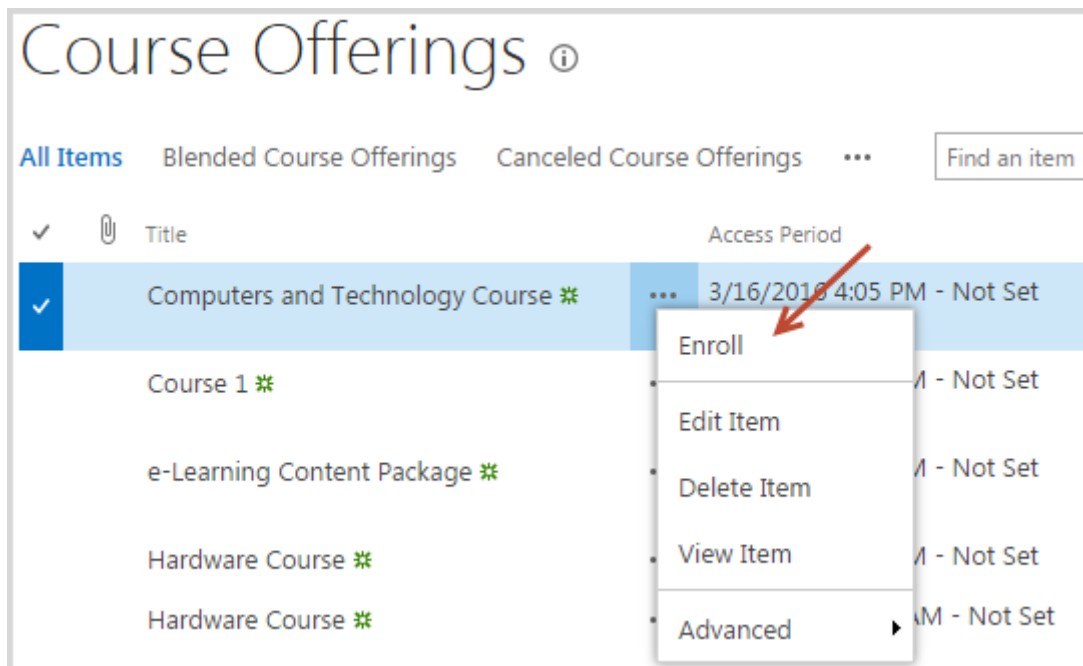
In the first case, go to the Courses list page, select the needed course, and then select Items > Manage Offerings or Enroll Users from the ribbon menu:



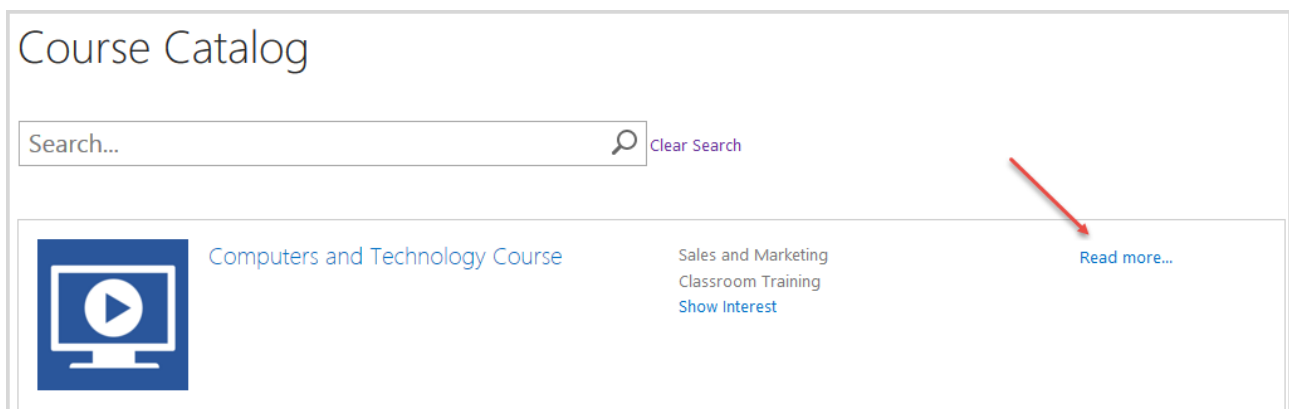
Then, select the needed Course Offering from available and click 'Enroll' in the ribbon menu:



In the second case, go to the Course Offering list page, the callout menu next to the needed course, and then select Enroll from the list:



In the third case, go to the Course Catalog page, and click 'Read more' link next to the course in which you want to enroll learners:



On the open page, select course offering in which you want to enroll learners or click 'Enroll Now' button:

REM My Dashboard Course Catalog

New Course

COURSE DESCRIPTION
detailed description text

EVENT DETAILS

Location	Room	Starts	Ends	Availability	Show Interest	Action
New York, NY, 51st Street W	Panorama View (30)	3/17/2016 12:00 AM	3/23/2016 12:00 AM	Places Available	Show Interest	Enroll

COURSE DETAILS
 Teacher(s): Anna Annaaaaa
 Type: Classroom Training
 Duration: 30d
 Category: General Employee Training

Enroll Now →

← Course Catalog

In all cases, you will be redirected to the Enrollment form. Complete the open form:

Enroll in - Computers and Technology Course

User Information

Add Multiple Users

▶ Select existing users to enroll

Anna Ageucheva:

Accept [Terms and Conditions](#)


Select users you want to enroll in the course, select Accept checkbox, and then click OK button. An Enrollment Confirmation message will be displayed to confirm successful enrollment:

Confirmation of Enrollment ✕

The selected user(s) has been enrolled into the training course "Huber Demo Course"

You can enroll into course offerings not just single learners, but whole groups. In order to enable group enrollment feature, do the following:

1. Go to the Settings > Site Settings section;
2. Go to the Site Collection Administration > Site collection features section;
3. Activate the SharePoint REM Group Enrollments site collection feature:



ELEARNINGFORCE - REM: Group Enrollments

The feature provides ability to enroll Active Directory and SharePoint groups into course offerings.

Activate

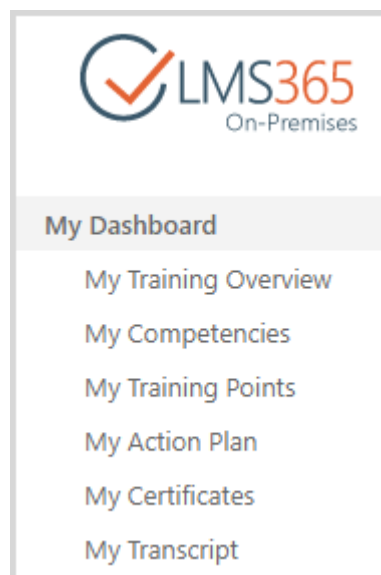
Now you will be able to enroll groups into courses. Follow the logic described above to open the Enrollment form, and then enter group title in the login name field instead of a single user and click OK button. All users from the group you have specified will now be enrolled in the course.

12. COMMON DASHBOARD OPERATIONS

Dashboard is a subsite created automatically on REM host site collection, and serves as a reference point for managers and employees in performing their daily tasks with training. This section contains information regarding operations that can be carried out by all user roles.

In My Dashboard section, users can view their:

1. Training Overview;
2. Competencies;
3. Training Points;
4. Action Plan;
5. Certificates;
6. Transcript:



1. My Training Overview – here the logged in user is able to view his courses like in SharePoint REM. All courses are divided into six categories: Current (information about course in which user is enrolled is shown: its name, category, type, status, start/end dates, and user's progress in it), Curriculums (displays Curriculums assigned to user's job and information about SharePoint REM courses included in user's Curriculums (curriculum progress is shown in brackets)), Pending Approval (displays courses that are waiting for approval, and information about courses), Waitlisted (displays courses that have exceeded the maximal number of enrolled learners and user is in the waiting list now, and information about courses), Completed (displays completed courses and information about them) and All (displays all user's courses and information about them: course name, category, type and status):

My Training Overview

Current (3)	Curriculums (2)	Pending Approval (1)	Waitlisted (0)	Completed (2)	All (9)
Name	Category	Course Type	Status		
New Course	...	e-Learning	Pending Approval ⓘ		
Introductory Course ↗	...	General Employee Training	Blended Learning	Completed	
Computers and Technology Course ↗	...	Compliance Training	Blended Learning	Enrolled	
Programme Management	...	Leadership and People Management	e-Learning	Enrollment Canceled ⓘ	
Computers and Technology Course	...	Compliance Training	Blended Learning	Enrollment Canceled ⓘ	
Barista Starcups	...	General Workplace Training	e-Learning	Enrolled	
Software Course (new)	...	IT and Technical Training	e-Learning	Enrolled	
Hardware Course ↗	...	IT and Technical Training	e-Learning	Completed	
Introductory Course	...	General Employee Training	Blended Learning	Enrollment Canceled ⓘ	

2. My Competencies – here the list of user’s competencies is shown. There are four tabs: Held, Required, Revoked and All:

My Competencies

Held	Required	Revoked	All				
Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
Foreign Language Competencies							
English-Spoken	1 2 3 4 5	4	4 (Starcups Store Manager)	0	4/7/2016	View Entries...	
Group 1							
Business Conduct	1 2 3 4 5	3	4	0	4/11/2016	View Entries...	
Technical Competencies							
Advanced Barista Skill	1 2 3	Not Present	Not Present	Not Present	4/11/2016	View Entries...	
Accounting	1 2 3 4 5	4	Not Present	0	4/11/2016	View Entries...	

3. My Training Points – here the list of user’s Training Points is shown. You can switch between Earned (default view) and Planned (Training Points from the courses with ‘Waiting For Start Date’ status are also displayed in this tab) views and see All Training Points. Use the Select Period field to search Training Points by period:

REM Course Catalog REM Settings **My Dashboard**

My Training Points

My Dashboard Select Period 10/17/2015 - [] [] Apply Dates Clear Dates

Total Training Points earned for the selected period: 119

Earned Planned All

Course Name	Date Earned	Training Points
material course (flow)	9/13/2016	32
scorm course (flow)	9/14/2016	53

4. My Action Plan – here the list of user’s competencies grouped by roles is shown. You can switch between Suggested and Pending competencies views and see Notes to your Action Plan:

My Action Plan

Suggested Pending Notes

Competency Name	Competency Group	Is Acquired	GAP	Earned	Due Date	Comments	Fill GAP
Competencies							
English-Spoken-Above Average	Foreign Language Competencies	Yes	0	4/7/2016	6/16/2016	View Entries...	
Business Conduct-Above Average	Group 1	Yes	0	4/11/2016		View Entries...	
Communication-Above Average	Ungrouped	Yes	0	3/31/2016		View Entries...	
Starcups Store Manager							
Coffee-making-Master	Ungrouped	No	-3			View Entries...	Fill GAP
Company and Product Knowledge-Above Average	Ungrouped	Yes	0	6/7/2016		View Entries...	

5. My Certificates – here all Certificates from SharePoint LMS, SharePoint CCM and SharePoint REM are shown. You can switch between Expired and Valid views and see All:

My Certificates

Valid (3) Expired (6) **All (9)**

Title	Status	Issued Date	Expiration Date	Type
course1	Expired	4/28/2016		Course
Starcups Barista	Valid	5/25/2016		Course
Introductory Course	Expired	4/11/2016		Course
Software Course	Expired	4/12/2016		Course
Hardware Course	Expired	4/11/2016		Course
New Super Course	Valid	5/25/2016		Course
Hardware Course	Expired	4/11/2016		Course
Starcups Barista	Expired	5/25/2016	5/26/2016	Curriculum
New Curriculum	Valid	5/25/2016	5/25/2017	Curriculum

6. My Transcript – displays a report from the Reporting Center (Transcript) generated for current user. It contains information about user and user’s Competencies, Courses and Certificates (these training records are stored both from past and present):

REM Course Catalog REM Settings My Dashboard

Transcript

My Dashboard Export to Pdf Settings

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

Learning Transcript For: ageucheva_a

Name: ageucheva_a
E-mail:
Manager: Learner 3
City: Minsk
Department: dep1
Employment Type: Full time
Gender: Female
Organization: CCM

Competencies		
Competency	Competency Level	Earned
Company and Product Knowledge	Above Average	6/7/2016
Communication	Outstanding	4/11/2016
Accounting	Above Average	4/11/2016
Business Conduct	Above Average	4/11/2016
Advanced Barista Skill	Experienced	4/11/2016
English-Spoken	Outstanding	4/11/2016
Leadership	Outstanding	8/19/2016
Teamwork	Average	8/17/2016

Courses			
Course Title	Description	Period	Status
Hardware Tutorial		7/29/2016 - 8/10/2016	Course Not Completed
Software Training		7/29/2016 - 7/29/2016	Course Completed

12.1 Manager's Operations

This section contains information regarding operations that can be carried out by manager and are not available for employee.

NOTE: Manager's section is available for manager only if his employees have Active CCM profiles:

- Manager
 - Score
 - My Staff
 - Courses
 - Competencies
 - Staff Competencies
 - Training Points
 - Action Plan
 - Certificates

If all his employees have Deactivated CCM profiles, Manager's section disappears.

In this section manager can view his staff information (manager can switch between the following tabs: Employees, Missing Certificates, Average Competency Gaps, Courses Status, and KPIs), see his Staff Competencies, as well as courses, competencies, Training Points, Action Plan, and Certificates for the selected user (using the 'Select User' field):

Courses

Select User

Current (4)
Curriculums (2)
Pending Approval (1)
Waitlisted (0)
Completed (3)
All (12)

Name	Category	Course Type	Status	Start Date ↓	End Date	Progress
Computers and Technology Course	IT and Technical Training	Classroom Training	Enrolled	4/12/2016 2:51 PM		No Progress Tracked
Computers and Technology Course	Compliance Training	Blended Learning	Enrolled	4/4/2016 5:39 PM		In Progress
Barista Starcups	General Workplace Training	e-Learning	Enrolled	4/1/2016		No Progress Tracked
Software Course (new)	IT and Technical Training	e-Learning	Enrolled	4/1/2016		No Progress Tracked

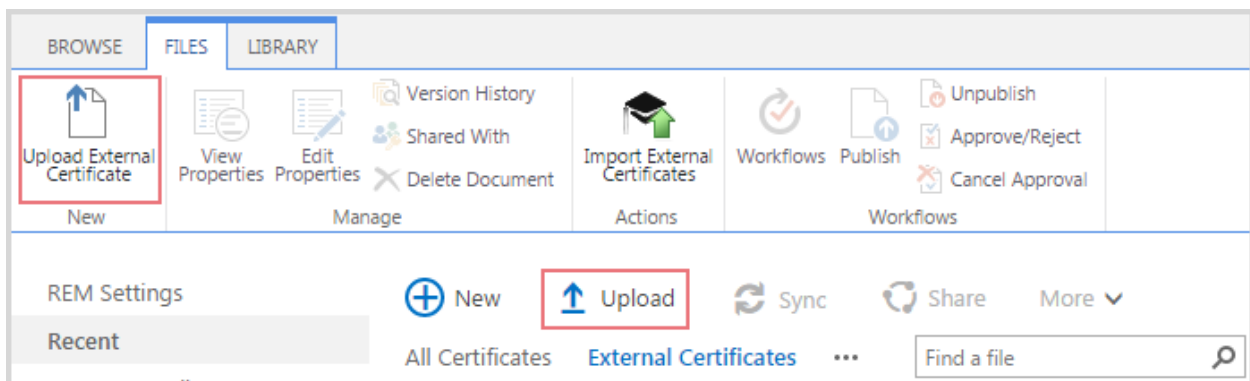
13. IMPORTING EXTERNAL CERTIFICATES

This feature allows you to upload external certificates (use this feature to upload historical records). To activate the feature, go to Settings > Site Settings > Site collection features and activate the ELEARNINGFORCE – REM: External Certificates feature:

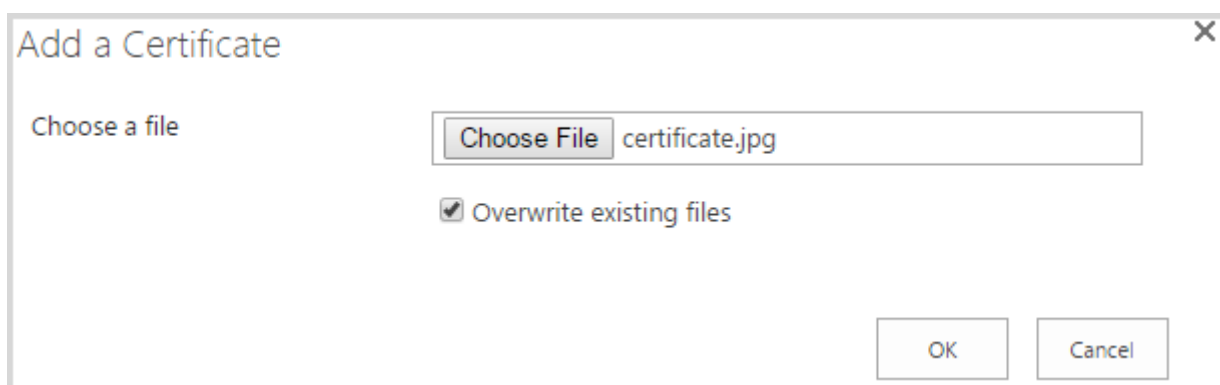


To upload an external certificate, do the following:

1. Click External Certificates link in REM Settings (or go to Site contents > Certificates (~Lists/REMCertificates)), and then Upload button or Upload External Certificate button on the ribbon:




2. Choose a file from your local computer to be uploaded and click OK button:





3. Complete the open form:


Add a Certificate ✕


EDIT



 Check In
Commit


 Cancel


 Paste
Clipboard


 Cut
Clipboard


 Copy
Clipboard


 Delete Item
Actions

Learner *

Course

Course Title: *

Company

Issued Date

Expiration Date

Continued Education Units

Competencies

- Communication-Above Average (4)
- Company and Product Knowledge-Above Average (4)
- [+ Add new](#)

The selected competencies will be granted automatically to the users who complete the course.

Automatic Revocation

Automatically revoke competencies when certificate expires

Created at 6/7/2016 5:26 PM by ageucheva_a
 Last modified at 6/7/2016 5:26 PM by ageucheva_a

Only Learner field is required (select one Learner who will receive a certificate). Other fields are optional. For example, you can specify the name of company, which issues the certificate, its issued/expiration date (issued date must be less than expiration date and expiration date must be greater than issued date), Training Points and competencies that are gained after the certificate is granted, or enable automatic revocation in order automatically revoke Learner's competencies granted by this certificate when certificate expires.

4. Click Check In button to upload the external certificate.

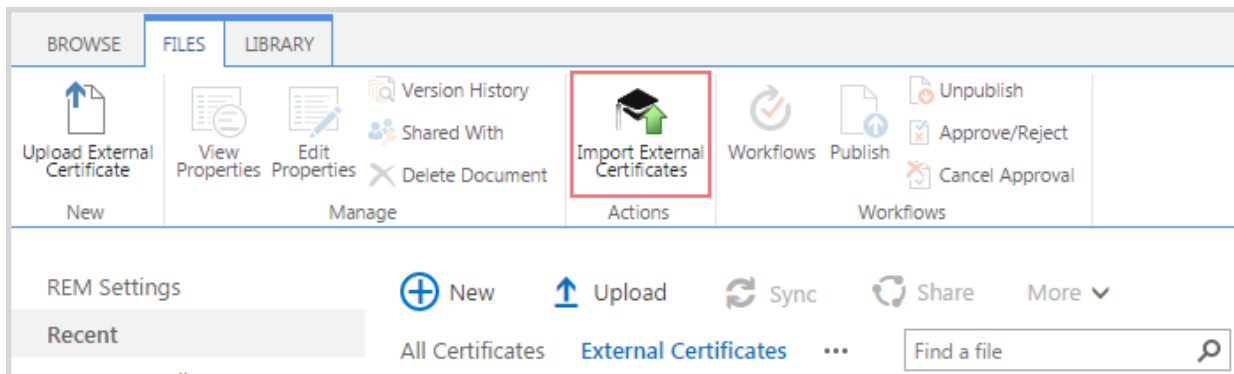
Remember that after you have uploaded an external certificate, you will not able to edit only Certificate Expiration Date field.

You can use bulk upload feature if there is a need to upload more than a single certificate. You can upload up to 1000 certificates via user interface.

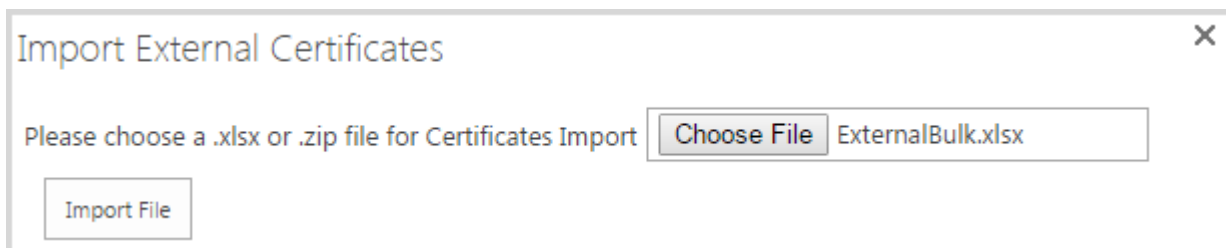
NOTE: To upload a bigger number of certificates, you can use the PowerShell command. See subchapter 1.10 of [LMS365 On-Premises REM Administration Guide](#) for details.

To use bulk upload feature, do the following:

1. Click External Certificates link in REM Settings, and then Import External Certificates button on the ribbon:



2. Choose an .xlsx (.xls files are not supported) or .zip file from your local computer to be uploaded and click Import File button:



- 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;

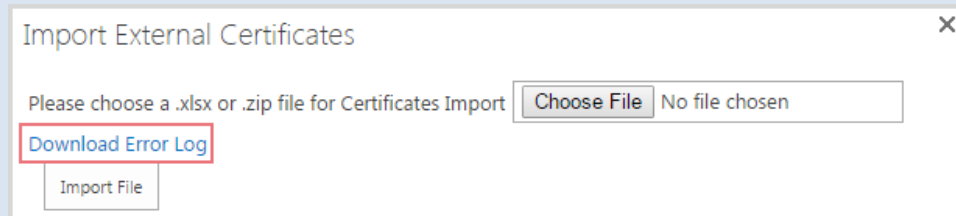
NOTE: The sample .xlsx file data is shown on a picture below:

	A	B	C	D	E	F	G	H	I	J
1	User name	Course name	Issued date	CEU	Company	Competency levels	Expiration date	Certificate image	Certificate template	Automatic revocation
2	example\8	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);

- Certificate image should be included into the archive to import, otherwise indicate a certificate template to use to generate a certificate (if not indicated a default certificate template will be used).

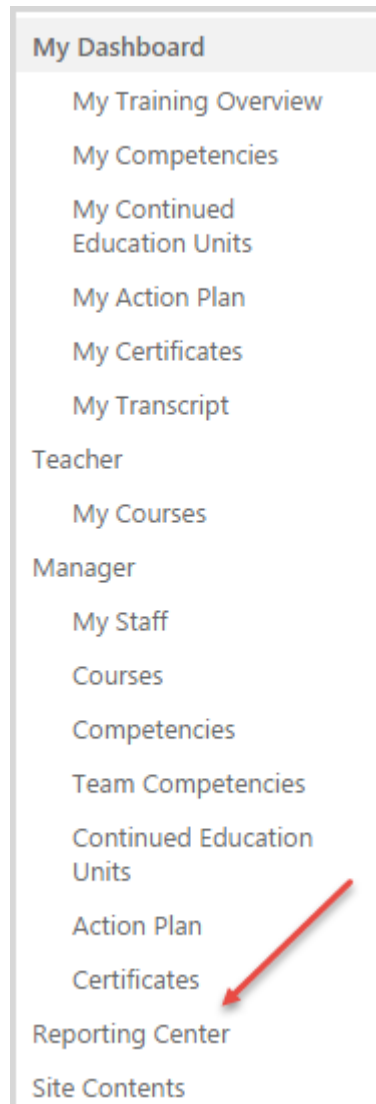
NOTE: Imported file is validated first and if there are any errors, you can download Error Log to see these errors:



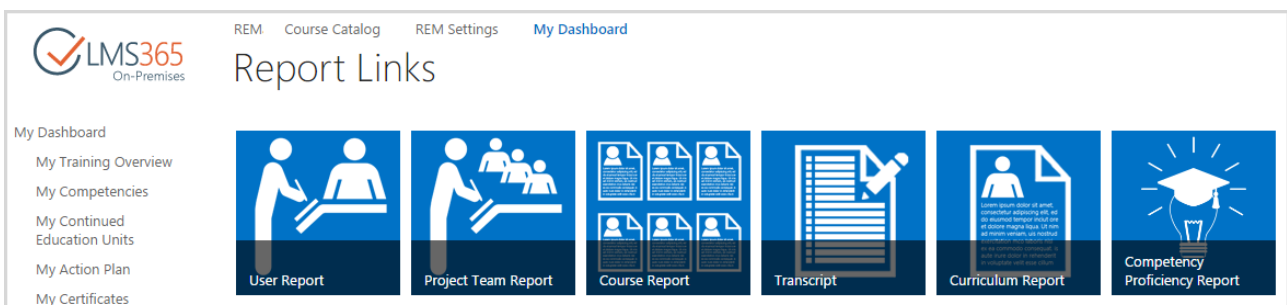
3. After bulk upload, each certificate from the imported file will appear in the list of certificates.

14. REPORTING CENTER

By default, you can access the Reporting Center section by navigating to the respective link in your Dashboard site. You can generate web reports containing information on employees' training activities and employees' competencies.



Click this link to open Report Links page:



You can select from the following report types:

1. User Report (you can see registrations by selected user);
2. Project Team Report (you can see registrations by selected Project Team);
3. Course Report (you can see registrations by selected course);
4. Transcript (you can generate Transcript for selected user);
5. Curriculum Report (you can see curriculum by selected user);
6. Competency Proficiency Report (you can see competencies by selected user).

These reports have different filters, using which you generate them, but most of the information type presented in the generated reports is the same.

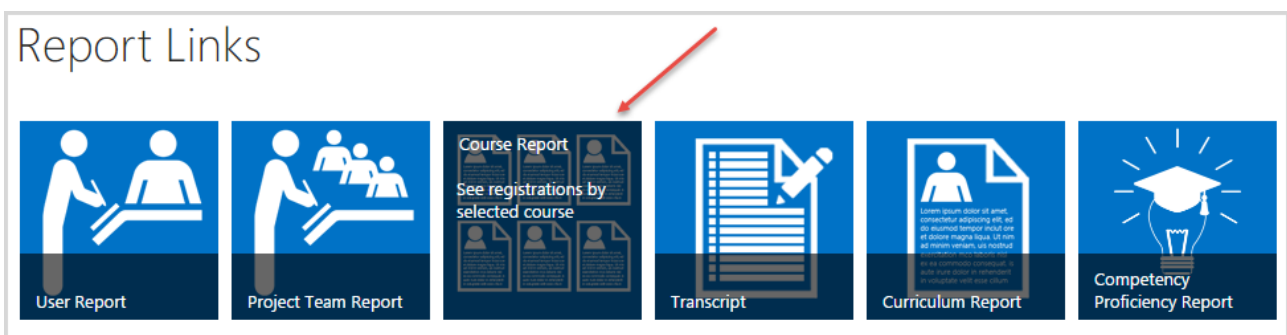
In the table below you can see Roles and Report types that they can correspondingly view:

Role	Report type
Site collection administrator	<ul style="list-style-type: none"> • User Report (can see himself, his subordinates); • Curriculum Report (can see himself, his subordinates); • Transcript (can see himself, his subordinates); • Project Team Report (can see all Project Teams if he administers CCM host site); • Course Report (can see all users who have CCM Profiles and filter by all courses); • Competency Proficiency Report (can see himself, his subordinates).
LMS Administrator	<ul style="list-style-type: none"> • User Report (can see himself, his subordinates); • Curriculum Report (can see himself, his subordinates); • Transcript (can see himself, his subordinates); • Project Team Report link is available in REM Settings (can see either all Project Teams if he administers CCM host site or only Project Teams where he is a member); • Course Report link is available in REM Settings (can see all users who have CCM Profiles and filter by all courses); • Competency Proficiency Report (can see himself, his subordinates).
Manager (Line Manager; HR Responsible; Manager from Relationships)	<ul style="list-style-type: none"> • User Report (can see himself, his subordinates);

	<ul style="list-style-type: none"> • Curriculum Report (can see himself, his subordinates); • Transcript (can see himself, his subordinates); • Project Team Report link is available in REM Settings and as a direct link (can see either all Project Teams if he administers CCM host site or only Project Teams where he is a member); • Competency Proficiency Report (can see himself, his subordinates).
<p>Teacher</p>	<p>Sees Reports links after redirecting from DB's Teacher area using Offering Report link:</p> <ul style="list-style-type: none"> • User Report (can see himself and his subordinates if has any); • Curriculum Report (can see himself and his subordinates if has any); • Transcript (can see himself and his subordinates if has any); • Competency Proficiency Report (can see himself and his subordinates if has any).
<p>Learner</p>	<p>Can see information about himself using direct links in:</p> <ul style="list-style-type: none"> • User Report; • Curriculum Report; • Transcript; • Competency Proficiency Report.

We will use **Course Report** as an example.

To generate a report, open Report Links page and select the needed report type:



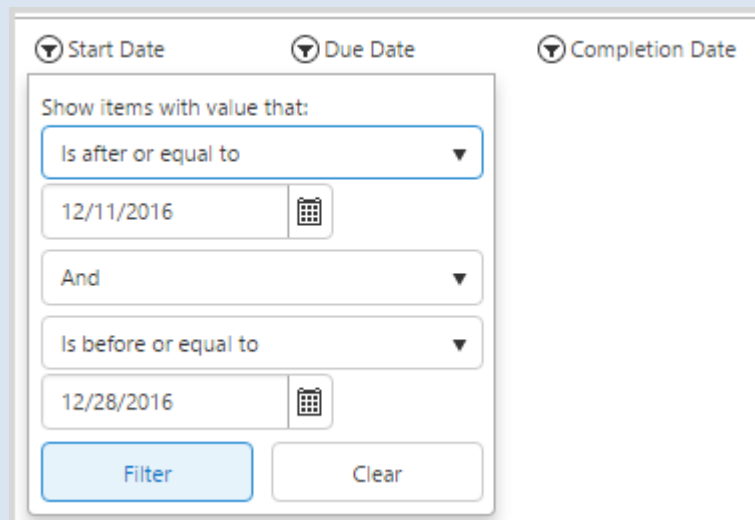
On the opened Reports page, use filters to customize information that will be included in your Report:



- *Course(s)* – a drop-down with list of courses where the user has Teacher role;

- *Offering(s)* – a drop-down with list of offerings for the selected course (several or all offerings can be selected). This filter appears if you select one course;
- *Period* – two fields for start date and end date. All registrations with the enrollment date falling under the selected period will be displayed in the report. Enrollment date is the date when registration status became 'Enrolled', e.g. when learner enrolls in a course offering with Access Start Date in future, he will have registration with 'Waiting For Start Date' status and it will be changed to 'Enrolled' when start date comes, and this date will be considered as enrollment date.

NOTE: For more convenient search by dates, we recommend using [Start Date](#), [Due Date](#), and [Completion Date](#) columns' filters when report is generated:



The screenshot shows a filter dialog box for the 'Start Date' column. It contains the following elements:

- Three column headers: 'Start Date', 'Due Date', and 'Completion Date', each with a dropdown arrow.
- A section titled 'Show items with value that:' containing a dropdown menu set to 'Is after or equal to'.
- A date input field containing '12/11/2016' and a calendar icon to its right.
- An 'And' dropdown menu.
- A second dropdown menu set to 'Is before or equal to'.
- A second date input field containing '12/28/2016' and a calendar icon to its right.
- Two buttons at the bottom: 'Filter' and 'Clear'.

Use Calendar icon to set date and then click Filter button to filter the information presented in the report.

Click Generate report button to generate a report. The following information will appear:

Course Title	ID	Course Type	Status	Start Date	Due Date	Completion Date	Certificate	Certificate Expiration Date	CEU Points	Score	Total Time
ageucheva_a											
Barista Starcups	R-10	e-Learning Course Site	Course Not Completed	4/1/2016	4/11/2016		<input type="checkbox"/>				
Software Course	R-32	Classroom Training	Enrolled	4/12/2016			<input type="checkbox"/>				
Computers and Technology Course	R-17	Blended Learning	Enrolled	4/4/2016			<input type="checkbox"/>				
Computers and Technology Course	R-9	Blended Learning	Canceled	4/4/2016			<input type="checkbox"/>				
Introductory Course	R-2	Blended Learning	Canceled	3/31/2016			<input type="checkbox"/>				
Introductory Course	R-18	Blended Learning	Course Completed	3/31/2016		4/11/2016	<input checked="" type="checkbox"/>				
Software Course (new)	R-4	e-Learning Course Site	Enrolled	3/31/2016			<input type="checkbox"/>				
Hardware Course	R-3	e-Learning Course Site	Course Completed	3/31/2016	6/15/2016	4/11/2016	<input checked="" type="checkbox"/>		98	240	
Computers and Technology Course	R-33	Classroom Training	Enrolled	4/12/2016	5/12/2016		<input type="checkbox"/>				
Hardware Course	R-31	Classroom Training	Course Completed	4/10/2016		4/11/2016	<input checked="" type="checkbox"/>				
Software Course	R-32	Classroom Training	Enrolled	4/12/2016			<input type="checkbox"/>				
Assistant 3											
Learner 10.											
Learner 2											
Learner 3											
Computers and Technology Course	R-6	Blended Learning	Course Not Completed	4/5/2016	4/11/2016		<input type="checkbox"/>				
Software Course (new)	R-7	e-Learning Course Site	Enrolled	3/31/2016			<input type="checkbox"/>				
Computers and Technology Course	R-43	Classroom Training	Enrolled	4/12/2016	5/12/2016		<input type="checkbox"/>				

- *Course Title*– shows course name;
- *ID* – shows user registration ID to the course;
- *Course Type* – shows type of the course;
- *Status* – shows status of user registration to the course;
- *Start Date* – shows registration enrollment date;
- *Due Date* – Due Date is displayed depending on Registration status. If Registration status is 'Enrolled' or 'Not Completed', Due Date displays the Due Date of Course Offering (if 'Dynamic Due Date' option is enabled on the Enrollment Template) or Access End Date of Course Offering. If Registration status is 'Completed', Due Date displays Registration completion date;
- *Completion Date* – shows course completion date (for completed registrations);
- *Certificate* – shows a mark next to courses for which user received a certificate;
- *Certificate Expiration Date* – shows date of certificate expiration (if certificate expires);
- *Training Points* – shows number of Training Points points assigned for the course;
- *Score* – shows user's score (in percentage terms) for the course, information is taken from SharePoint Dashboard (for e-learning and blended courses only). For e-learning content package courses points got for SCORM completion are displayed in this column;

NOTE: For e-learning and blended courses, Score is displayed according to the Gradebook settings.

For e-learning content package courses, Score is displayed as Points got for the last user's attempt. If completion of multiple SCORMs is required for course completion, an average of last attempts of these SCORMs is displayed in Score column.

Score value is displayed when Course registration status is changed to 'Course Completed'.

- *Total Time* – shows user's total time for the course, information is taken from SharePoint Dashboard Attendance section (for e-learning, blended and classroom training courses).

You can also customize information presented in the generated report. To do this, click settings button next to Export to Excel button:



In the open form you can select which columns to show/hide (Display column), change title of any column (Column Name column), set order of columns (Position from Left column), group information by necessary properties (select from the drop-down), and add any column from CCM Personal Profiles (UserProfile category), Course, Course offering, and Course registration lists categories (expand necessary category and select columns to add). Other columns (Certificate and User categories) are managed by the system:

Grid Settings ✕

Display	Column Name	Field	Position from Left
<input checked="" type="checkbox"/>	<input type="text"/>	User => Title	1 ▼
<input checked="" type="checkbox"/>	Course Title	Course registration => Course Title	2 ▼
<input checked="" type="checkbox"/>	ID	Course registration => ID	3 ▼
<input checked="" type="checkbox"/>	Course Type	Course => Course Type	4 ▼
<input checked="" type="checkbox"/>	Status	Course registration => Status	5 ▼
<input checked="" type="checkbox"/>	Start Date	Course registration => Start Date	6 ▼
<input checked="" type="checkbox"/>	Due Date	Course registration => Due Date	7 ▼
<input checked="" type="checkbox"/>	Completion Date	Course registration => Completion Date	8 ▼
<input checked="" type="checkbox"/>	Certificate	Course registration => Certificate	9 ▼
<input checked="" type="checkbox"/>	Certificate Expiration Date	Certificate => Certificate Expiration Date	10 ▼
<input checked="" type="checkbox"/>	Training Points	Course registration => Training Points	11 ▼
<input checked="" type="checkbox"/>	Score	Course registration => Score	12 ▼
<input checked="" type="checkbox"/>	Total Time	Attendance => Total Time	13 ▼

- Attendance
- Certificate
- Course
- Course offering
- Course registration
- User
- User Profile

NOTE: You can add custom columns to specified lists (via List Settings on lists pages), and then check them in Grid Settings to add to the report.

NOTE: The following types of columns are supported: string, number, and date.

Click OK button to apply the changes or Cancel button to discard them.

NOTE: Specified grid settings will be set for all users.

To generate and save the report to your local computer (or to save already generated report), click Export to Excel button.

Other report types are generated using the same logic.