Quick Start Guide

LMS365

On-Premises

For Microsoft SharePoint Server

ELEARNINGFORCE

CONTENTS

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.

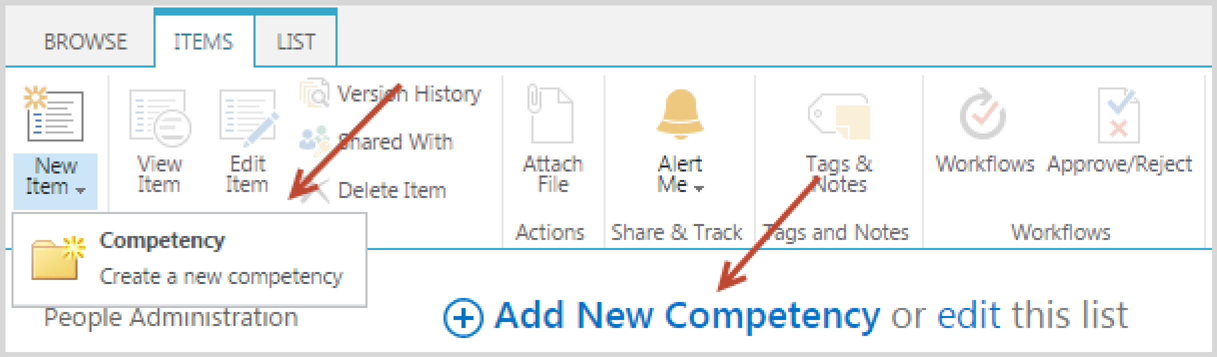
2. CREATING CCM COMPETENCIES, ROLES AND JOBS

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.

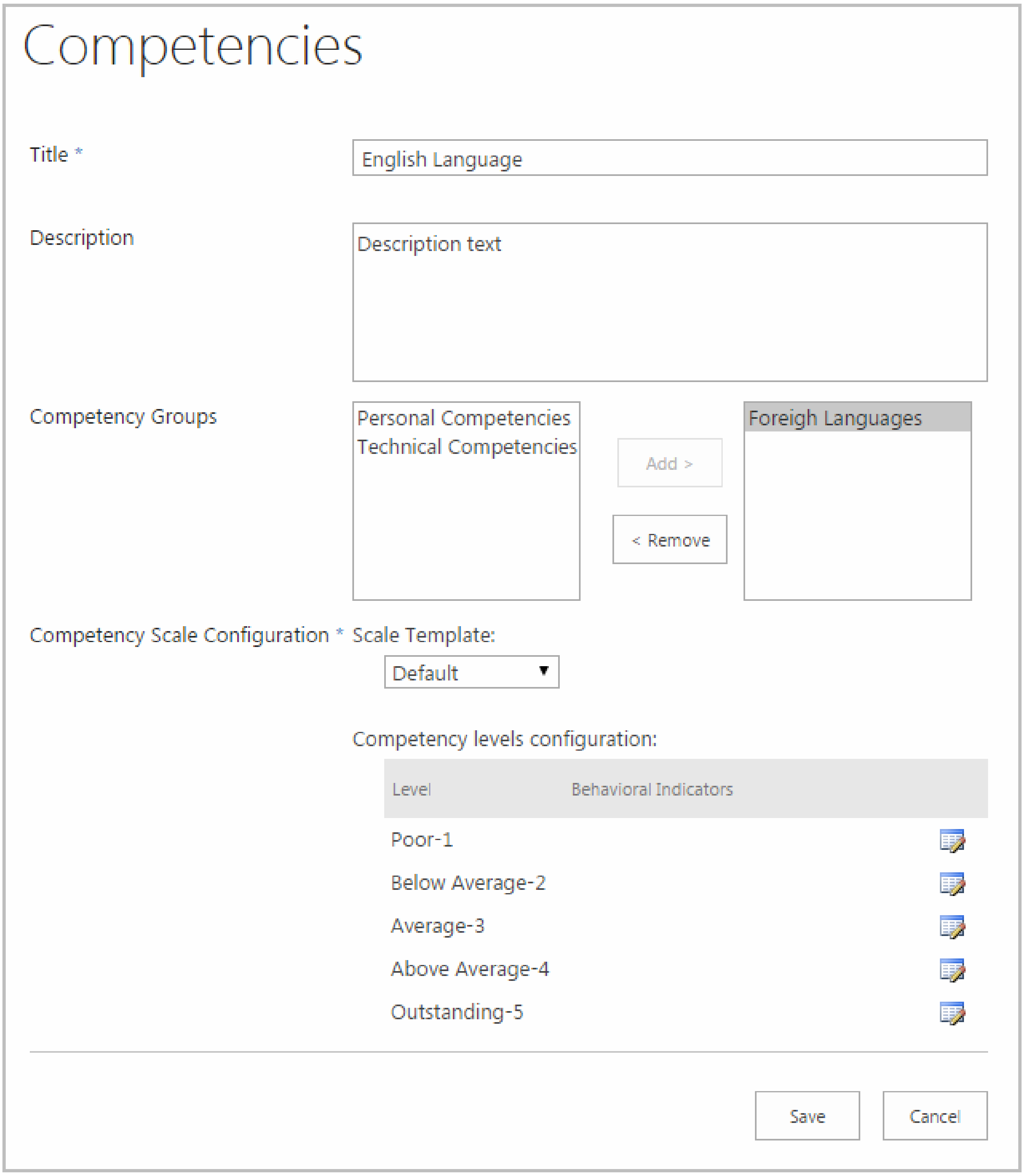
To create new competencies, roles and jobs (they need to be created in the mentioned order), go to your CCM home page, and on the left-side menu select the needed link:

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 ⊕:



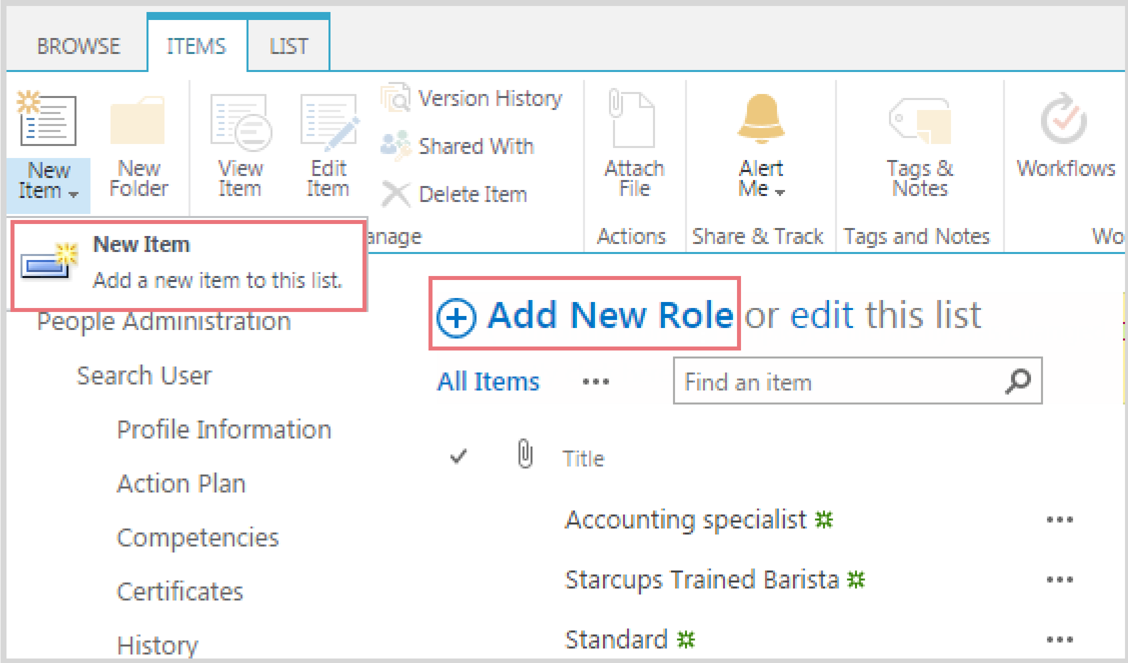
3. Complete open New Item form. You must specify the name of the competency and its scale configuration (taxonomy scale). Other fields are optional:



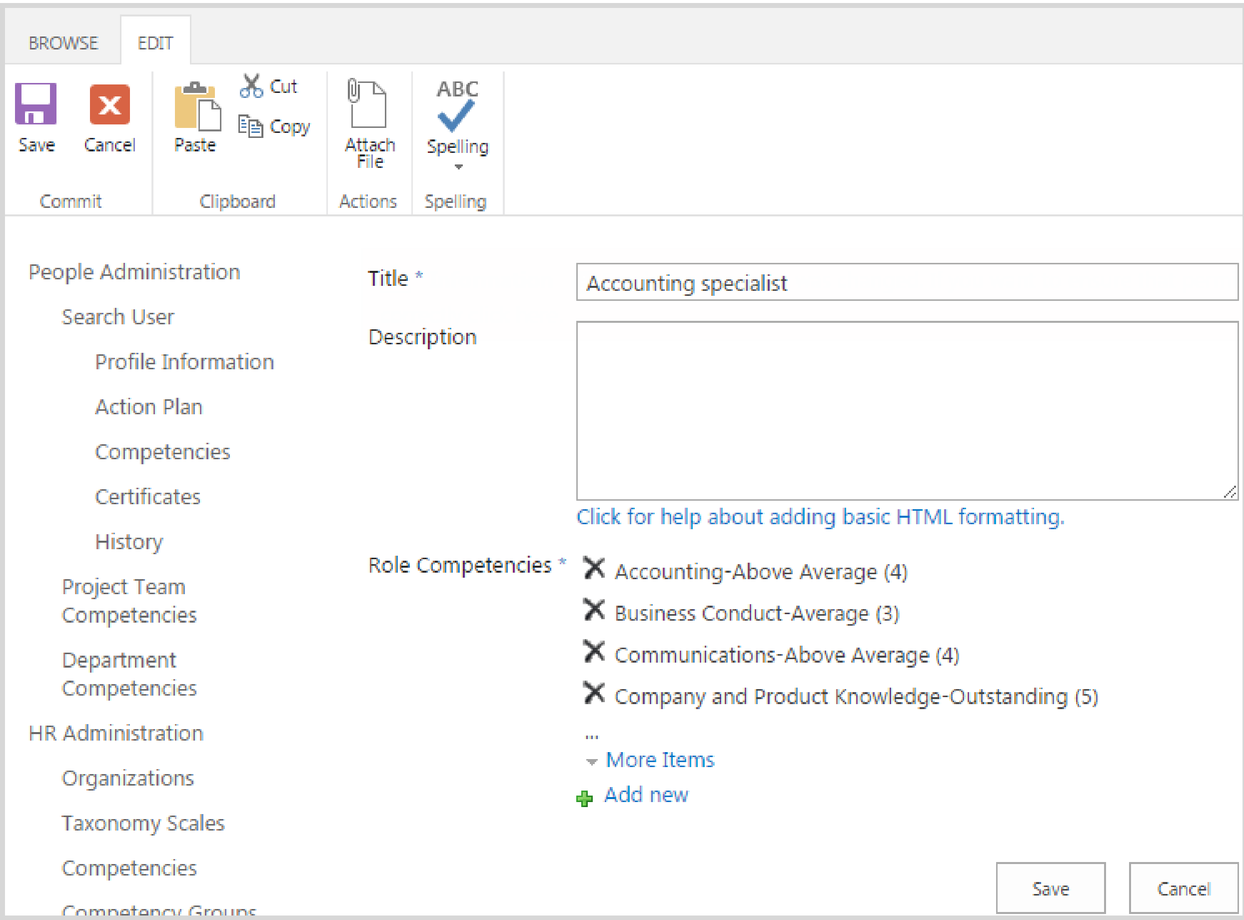
4. Click Save button to add created competency to the Competencies list.

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 ⊕ :



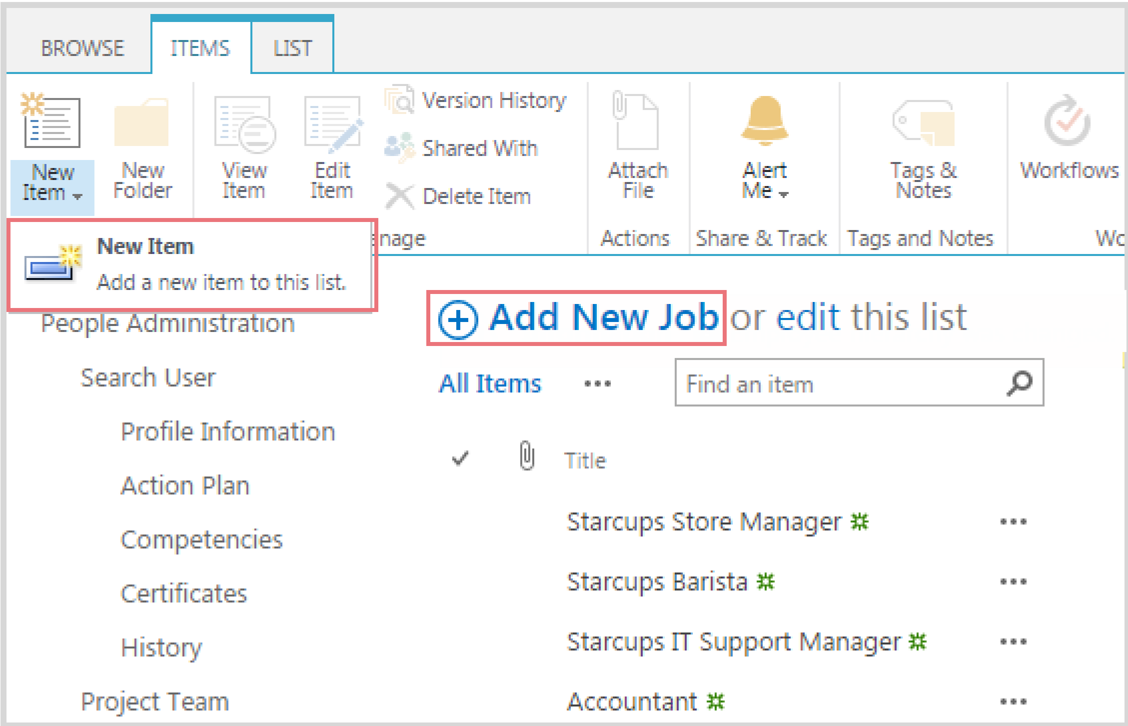
3. Complete open New item form. You must specify the name of the role and select at least one competency for it (from the Competencies list). Description field is an optional field:



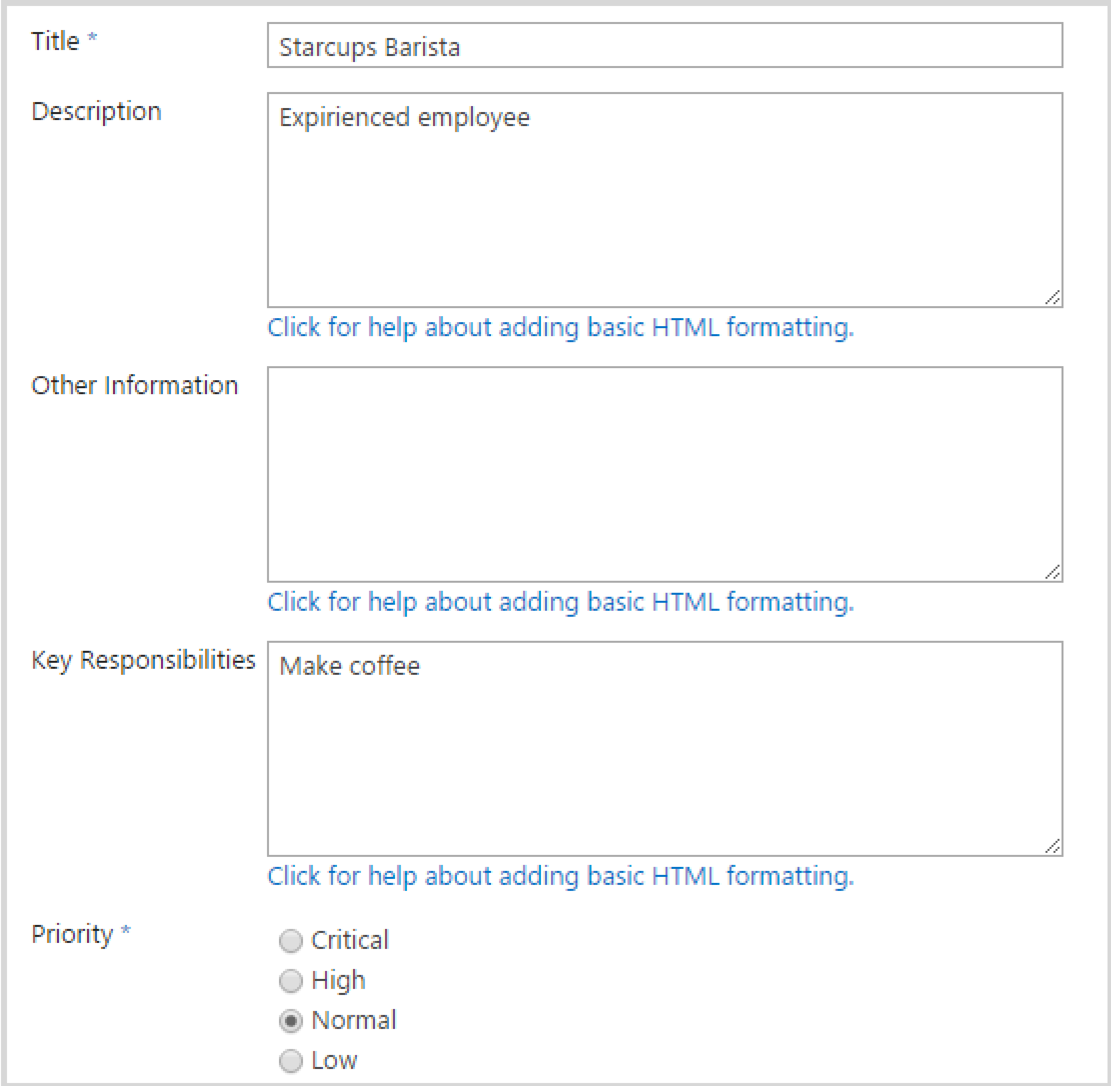
4. Click Save button to add created role to the Roles list.

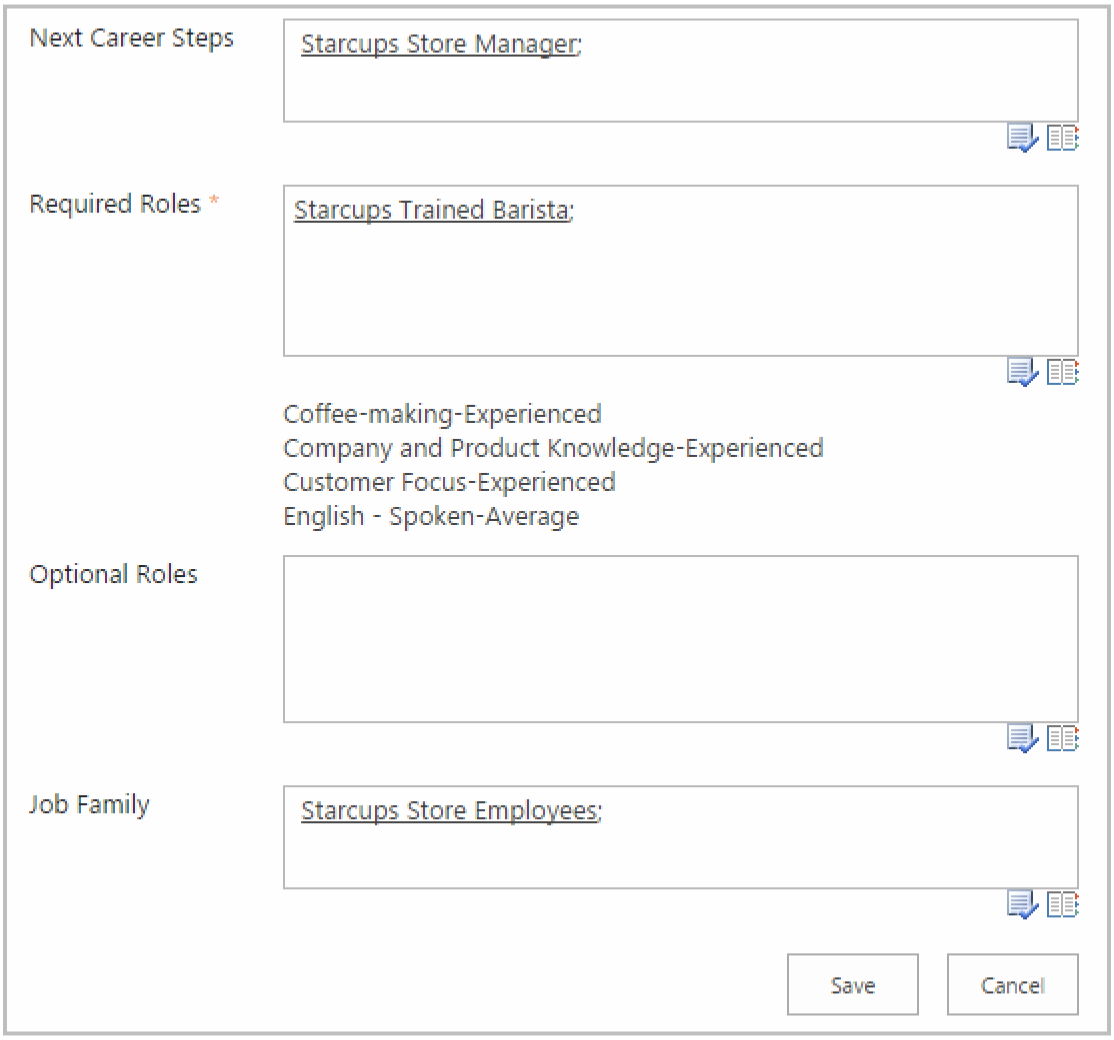
To create a new **job**, do the following:

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 *
Starcups Barista
Description
Expirienced employee
Click for help about adding basic HTML formatting.
Other Information
Click for help about adding basic HTML formatting.
Key Responsibilities
Make coffee
Click for help about adding basic HTML formatting.
Priority *
Critical
High
Normal
Low



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

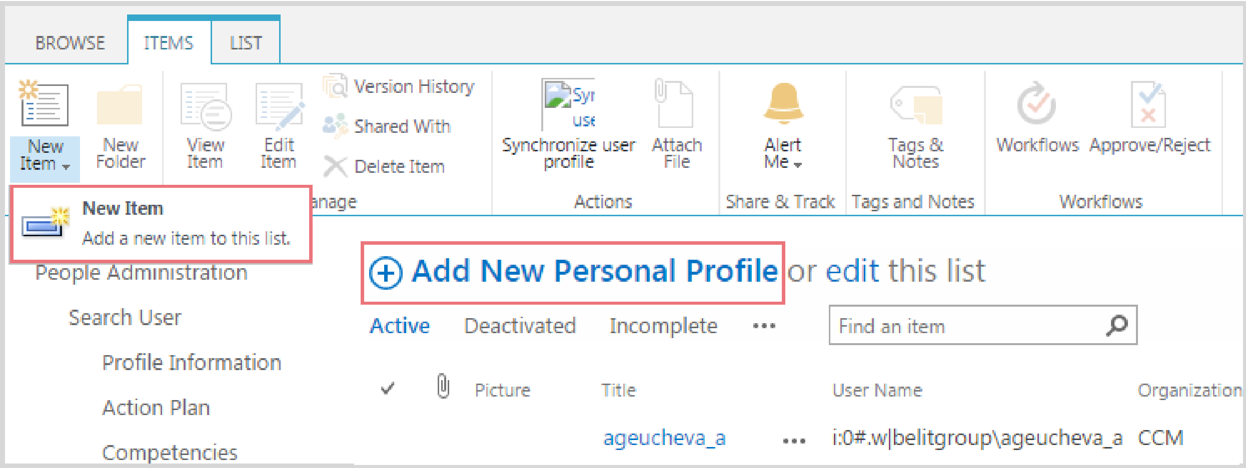
You can use callout menu actions as well as ribbon actions to view, edit and delete created items.

3. CREATING CCM PROFILES AND PROFILE SYNCHRONIZATION

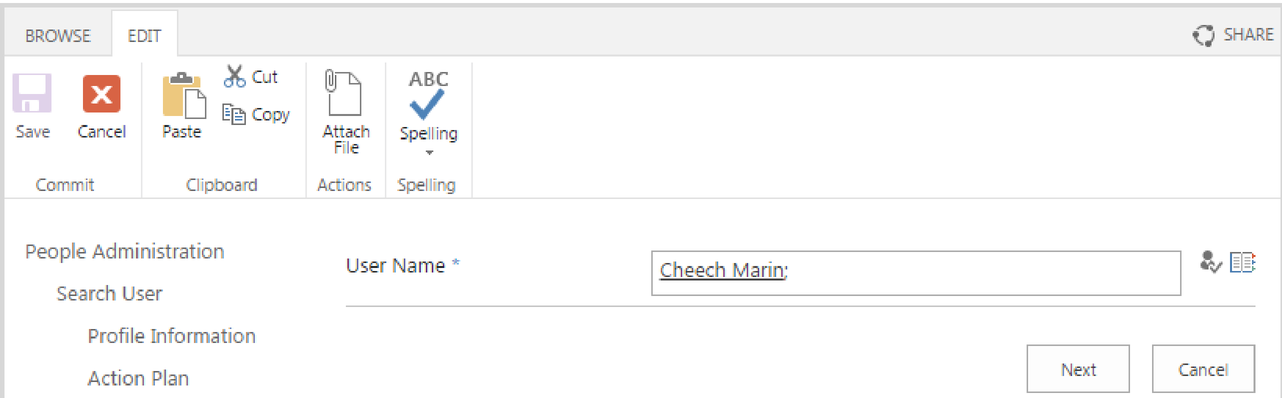
Personal Profiles are necessary to see employees in the SharePoint REM (Dashboard and Reporting Center).

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

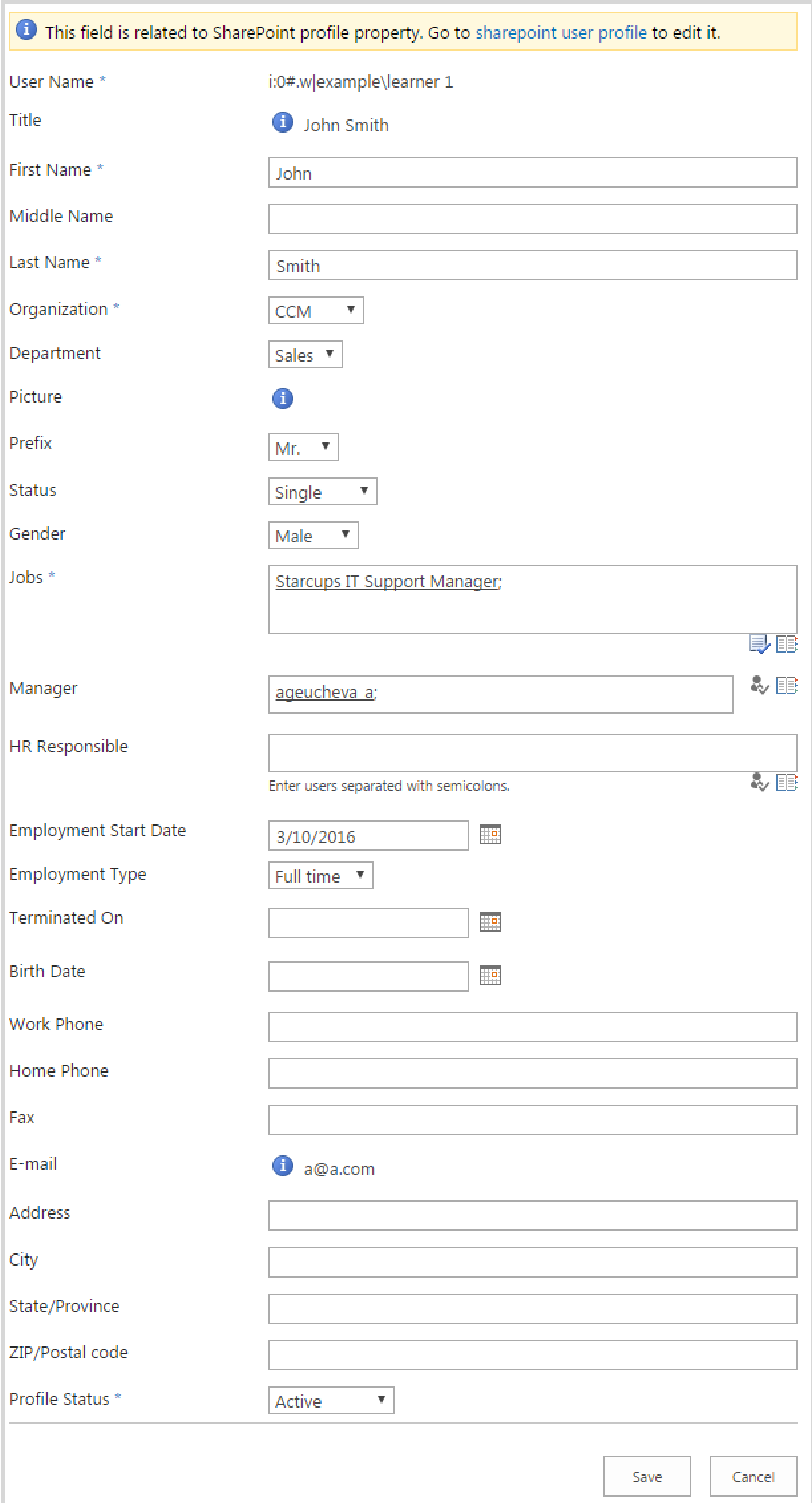
1. On the ribbon menu choose New Item and click New Item OR click Add New Personal Profile button ⊕:



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:



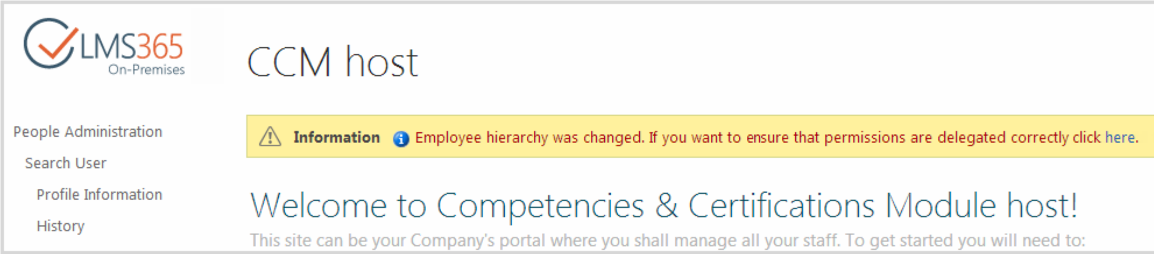
This field is related to SharePoint profile property. Go to sharepoint user profile to edit it.

User Name *	i:0#.w|example\learner 1
Title	John Smith
First Name *	John
Middle Name	
Last Name *	Smith
Organization *	CCM
Department	Sales
Picture	
Prefix	Mr.
Status	Single
Gender	Male
Jobs *	Starcups IT Support Manager;
Manager	ageucheva a;
HR Responsible	Enter users separated with semicolons.
Employment Start Date	3/10/2016
Employment Type	Full time
Terminated On	
Birth Date	
Work Phone	
Home Phone	
Fax	
E-mail	a@a.com
Address	
City	
State/Province	
ZIP/Postal code	
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 ELEARNINGFORCE - 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 (ELEARNINGFORCE - REM: Managers synchronizer job). Remember that ELEARNINGFORCE – 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

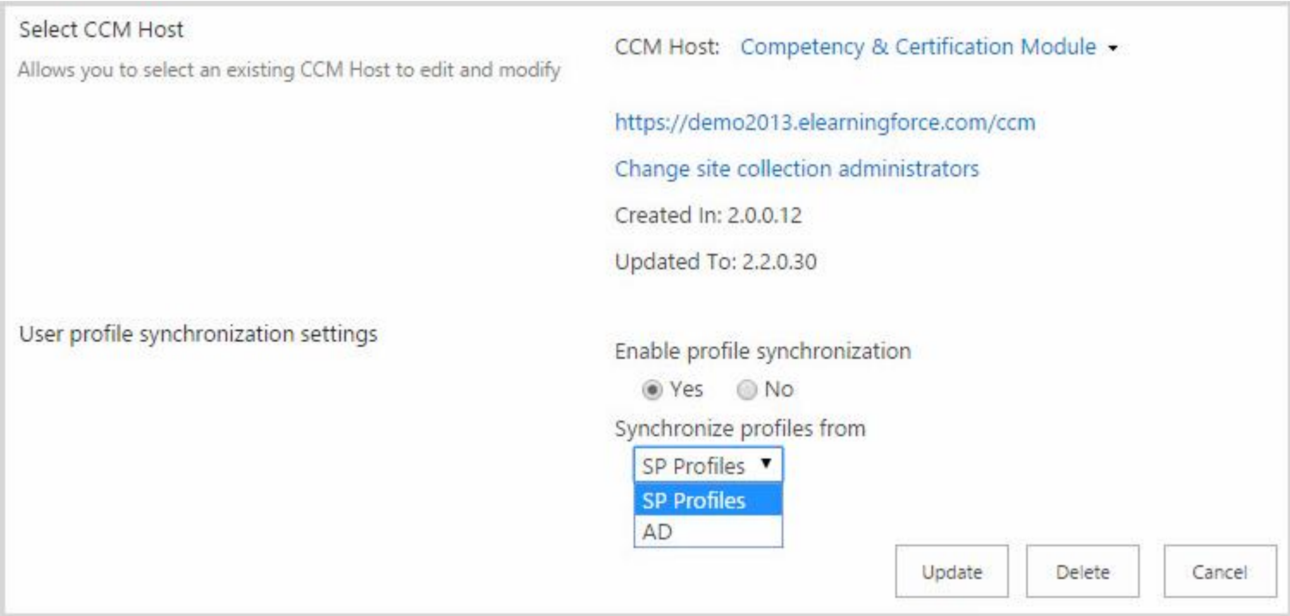
SharePoint CCM product is centered on CCM user profile. In order to avoid manual work of adding CCM profiles the solution provides two ways of profiles synchronization:

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 ‘ELEARNINGFORCE – CCM: User Profile Synchronization Job’ which is activated during LMS Suite installation. The feature registers ‘ELEARNINGFORCE – 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:



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.

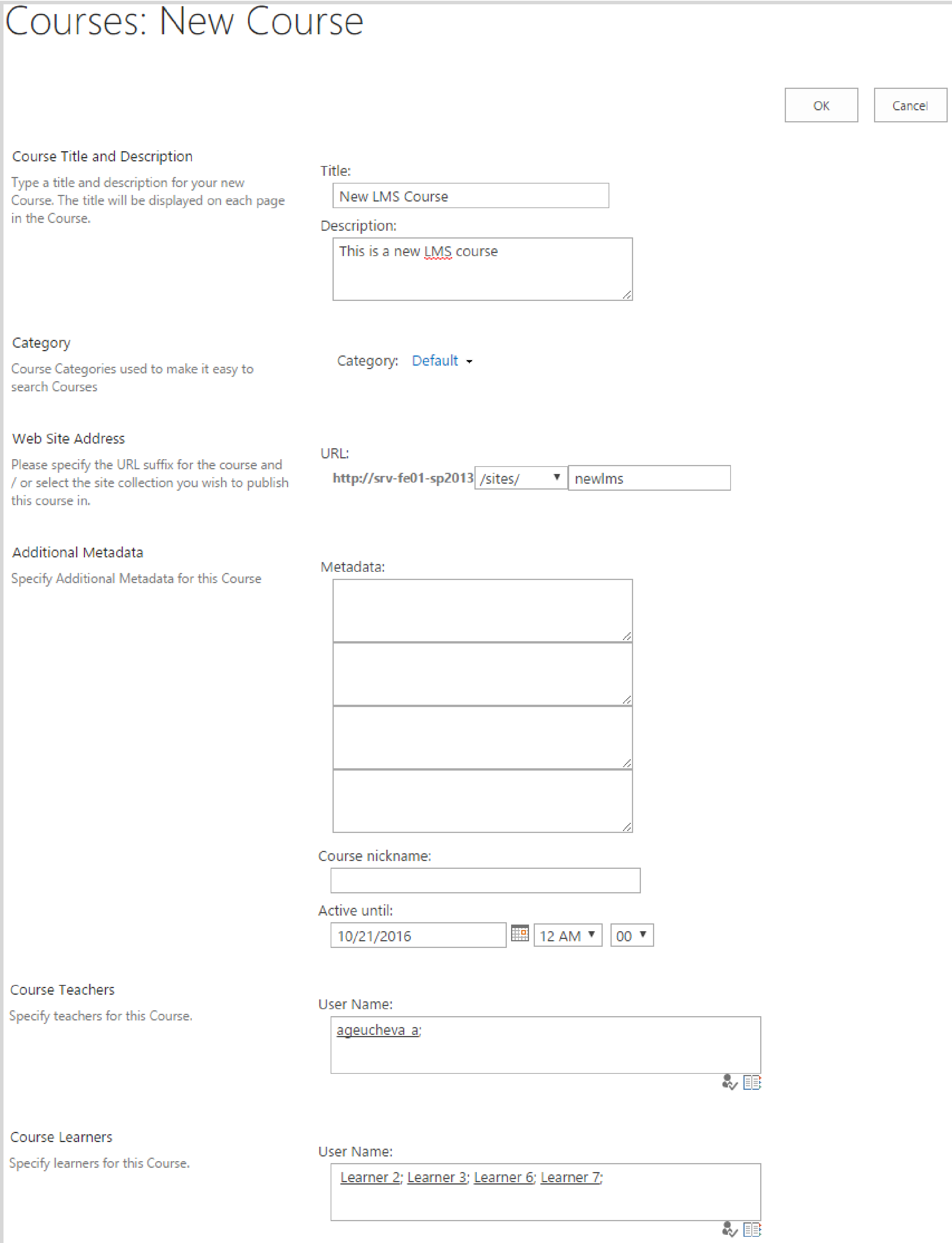
After that, it creates missing CCM profiles and updates existing ones. If there is enough information to set all required fields, profiles are created with 'Active' status, otherwise with 'Incomplete' one.

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:



– *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.

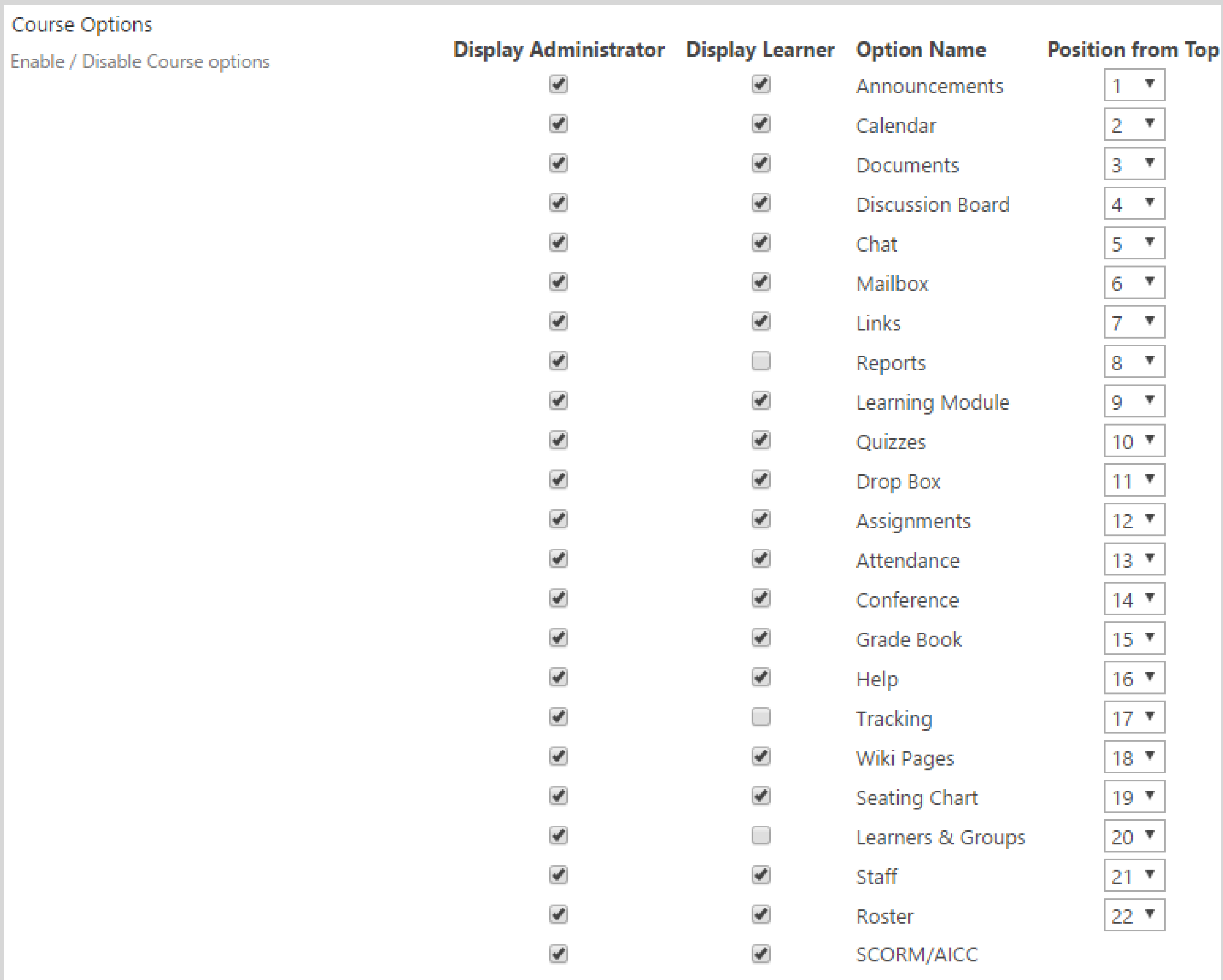
– *Category* – specify the course category;

– *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

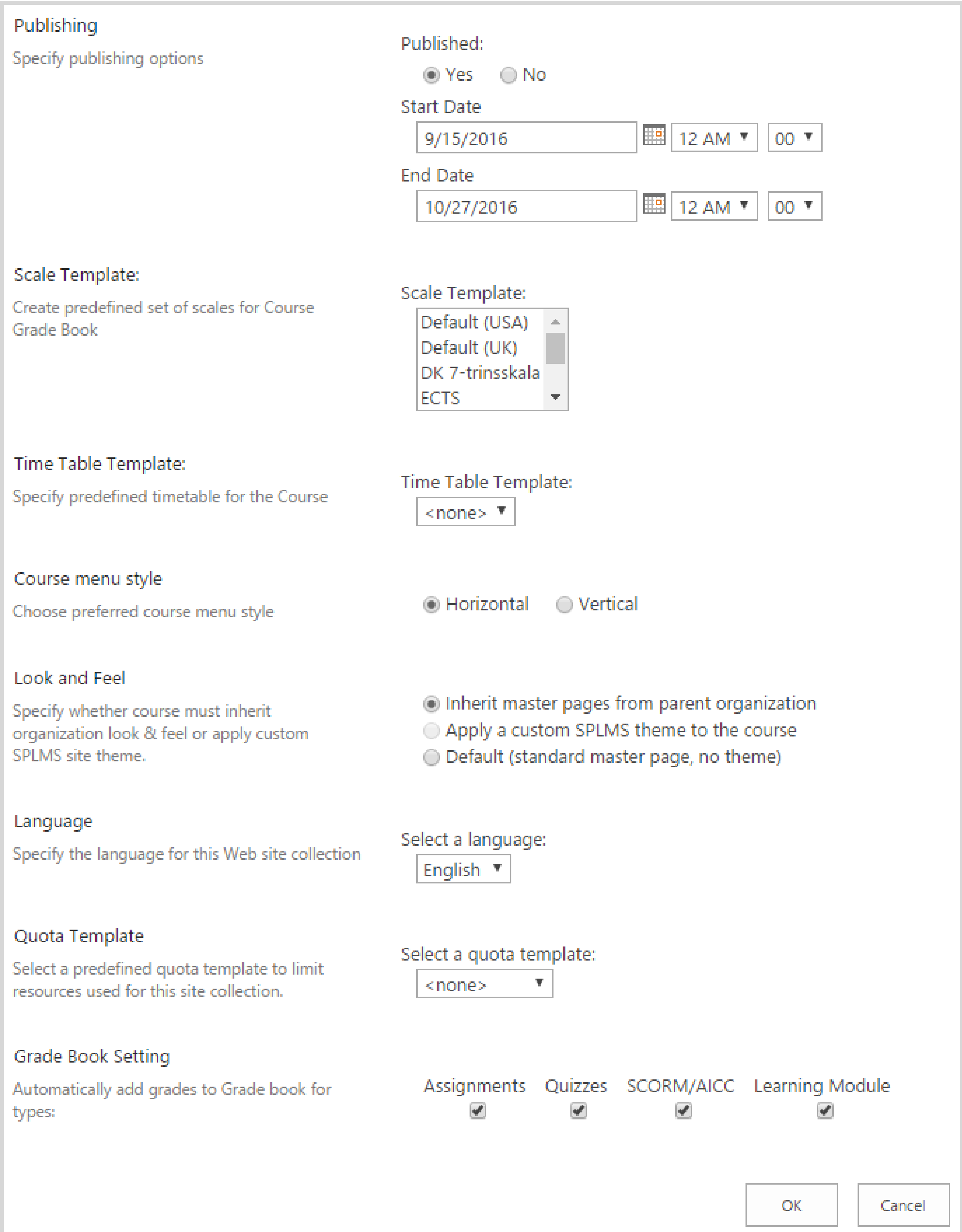
Enable / Disable Course options

Display Administrator	Display Learner	Option Name	Position from Top
☑	☑	Announcements	1
☑	☑	Calendar	2
☑	☑	Documents	3
☑	☑	Discussion Board	4
☑	☑	Chat	5
☑	☑	Mailbox	6
☑	☑	Links	7
☑	☐	Reports	8
☑	☑	Learning Module	9
☑	☑	Quizzes	10
☑	☑	Drop Box	11
☑	☑	Assignments	12
☑	☑	Attendance	13
☑	☑	Conference	14
☑	☑	Grade Book	15
☑	☑	Help	16
☑	☐	Tracking	17
☑	☑	Wiki Pages	18
☑	☑	Seating Chart	19
☑	☐	Learners & Groups	20
☑	☑	Staff	21
☑	☑	Roster	22
☑	☑	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 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.

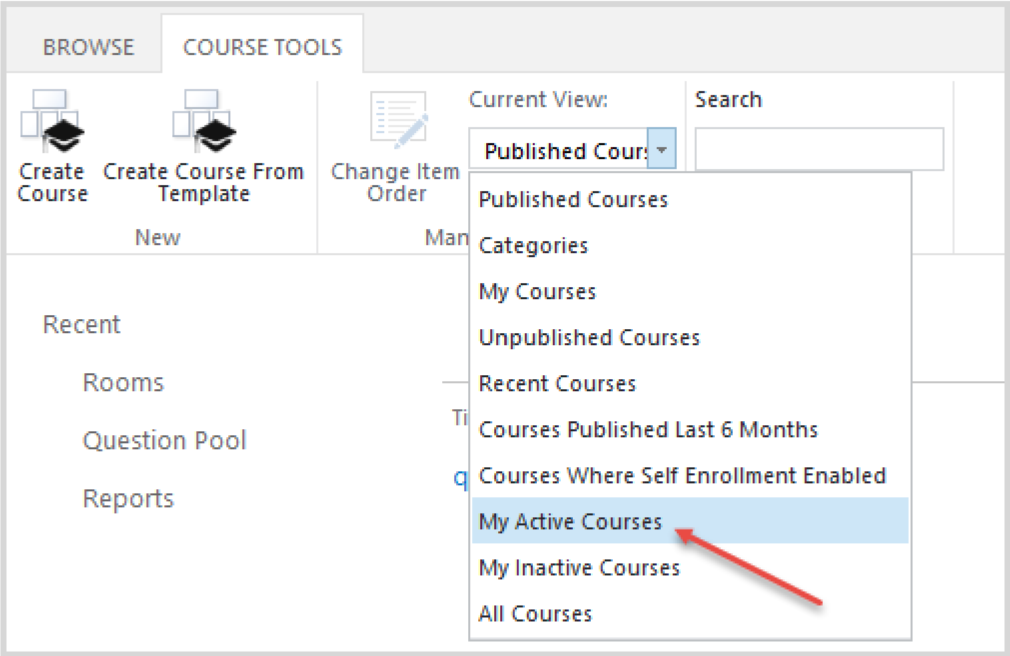
NOTE:	After you create a course and before you start working with its content you must first configure all necessary groups with Learner permission level! It is required because each time a new group with Learner permission level is created on the course, the site collection permissions are reassigned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

5. SAVING COURSE AS TEMPLATE

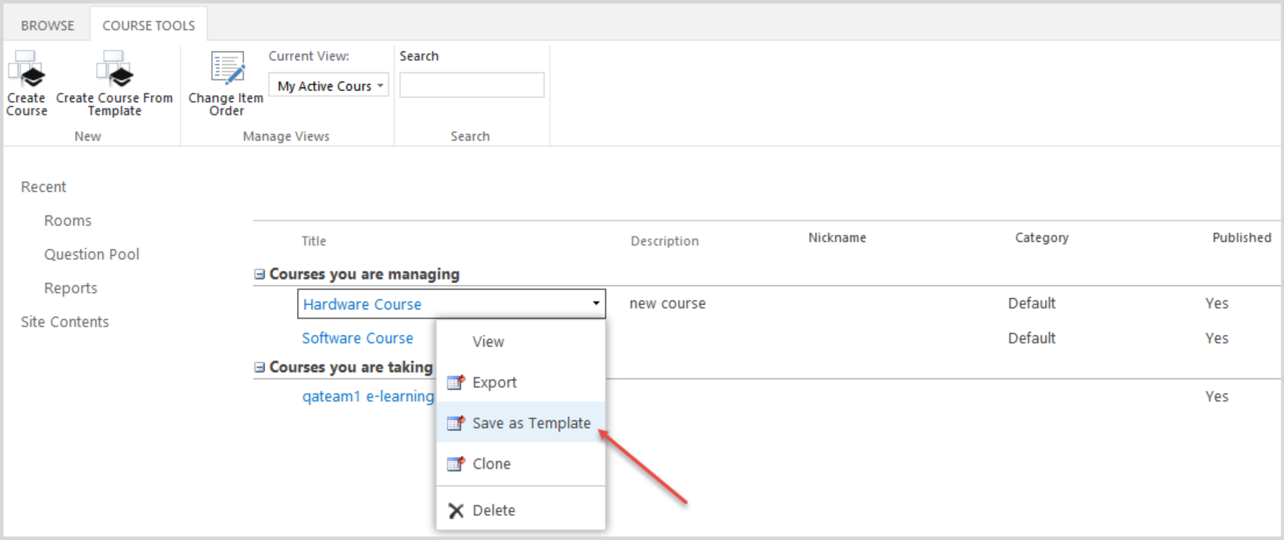
NOTE:	To use Save as Template option, user should have permissions to create new items in the Course Template Gallery organization lists.

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

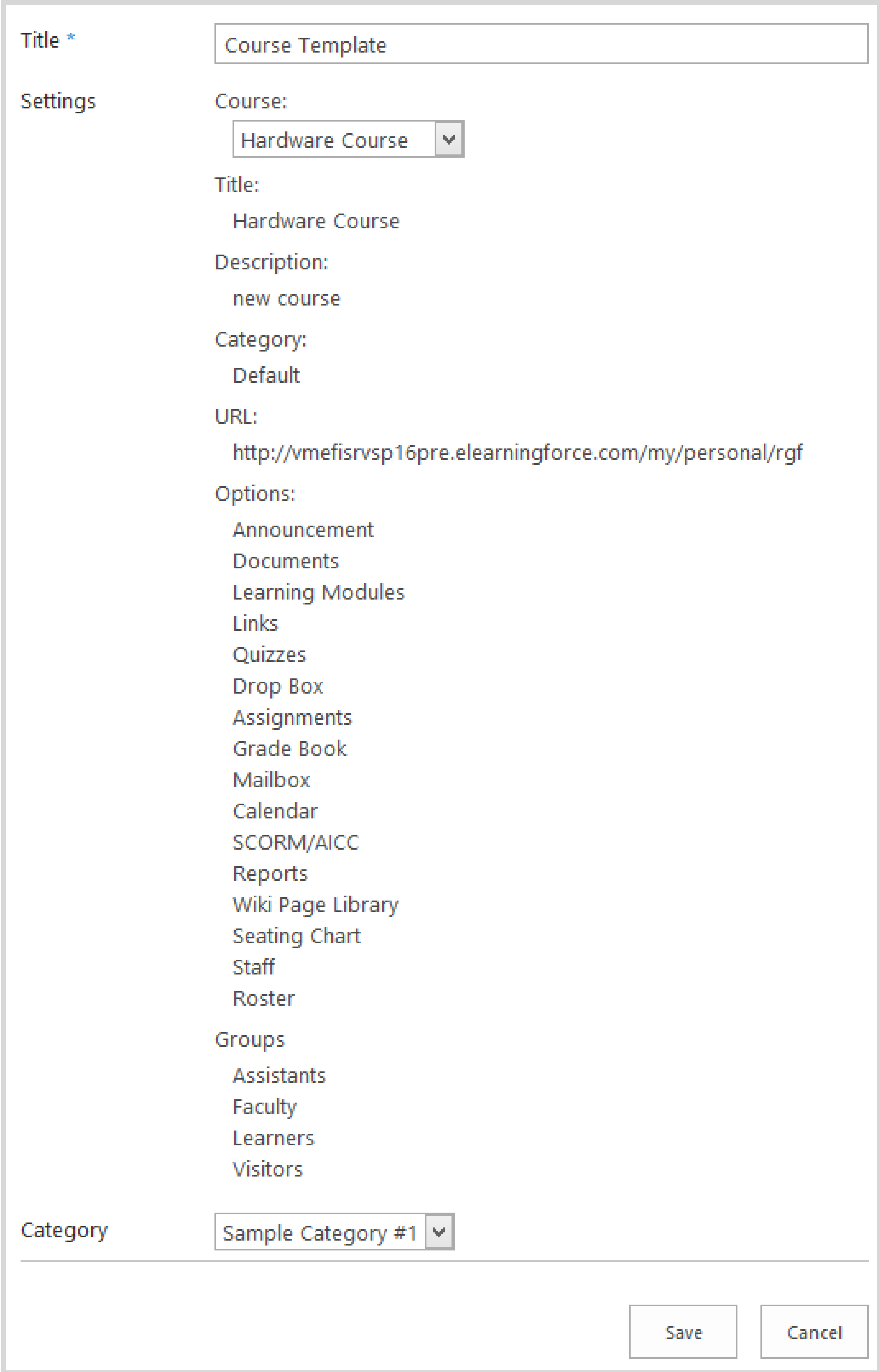
1. On the Organization level, go to Settings>Courses;
2. Go to Course Tools;
3. On the ribbon menu click the Current View drop-down menu and select My Active Courses view:



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:



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):



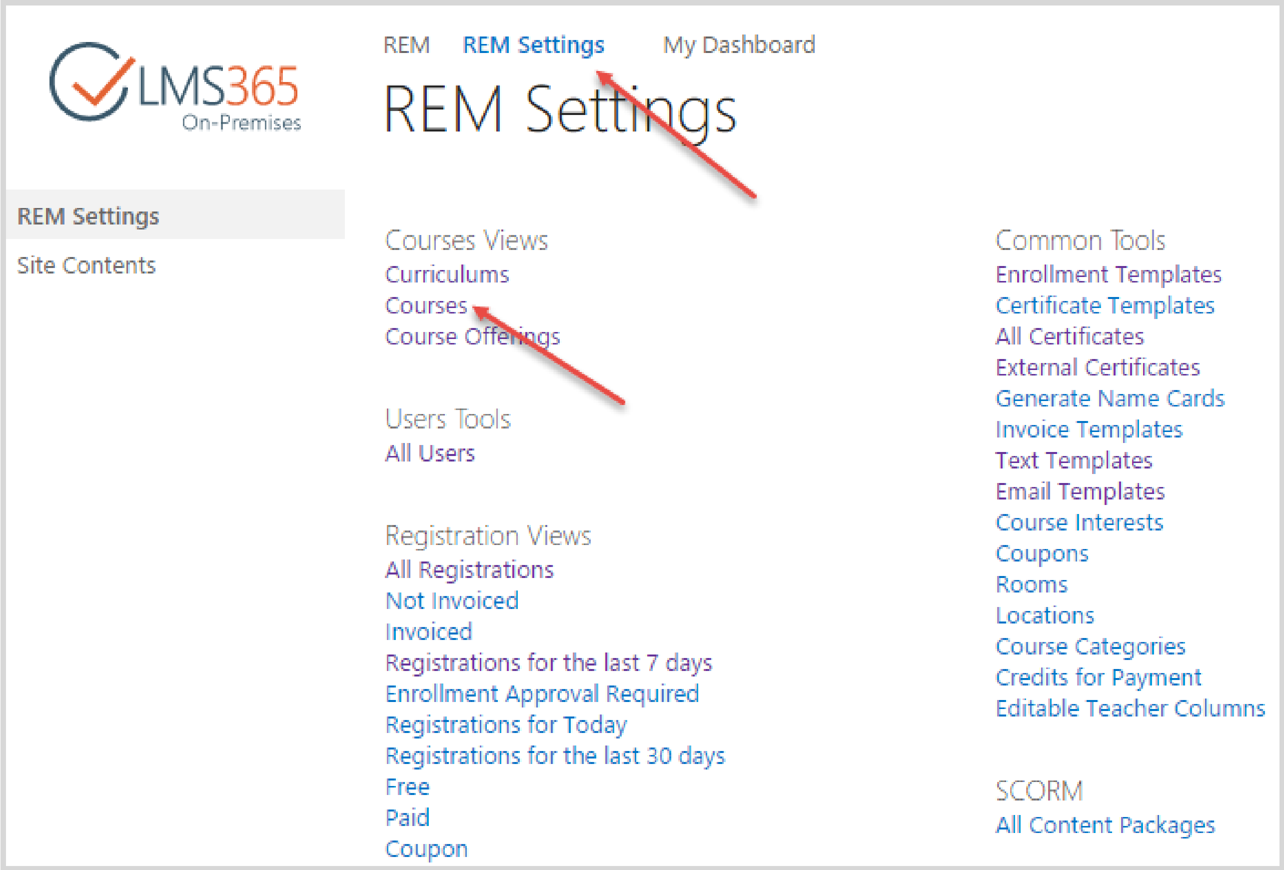
NOTE:	Templates will contain the following items: – Course tools (learners data such as, for example, attempts, will not be saved); – Custom lists (if lists have specific access rights, only access rights relevant for SharePoint groups will be saved);

	– 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.

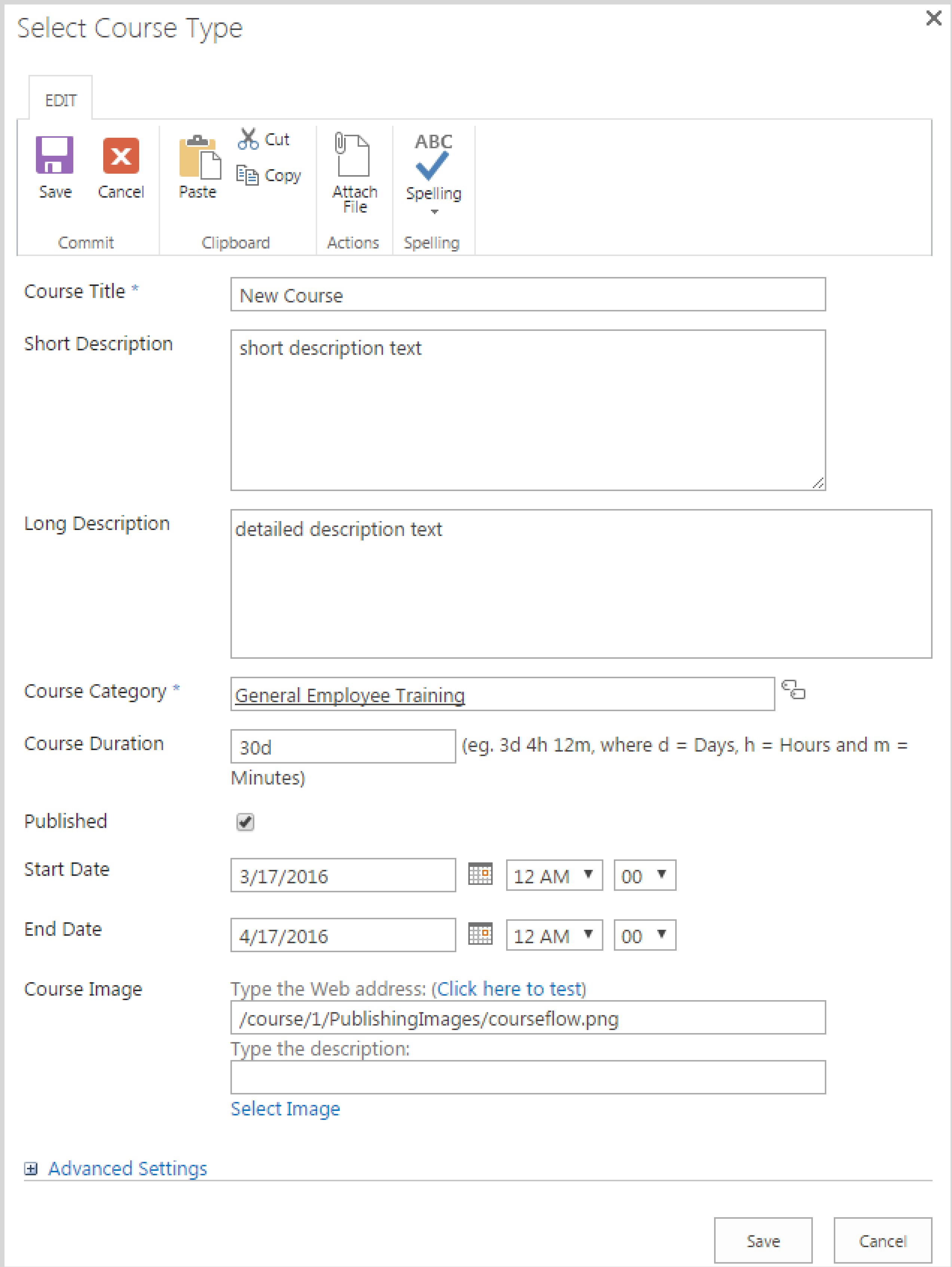
7. Click Save to save the changes.

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:



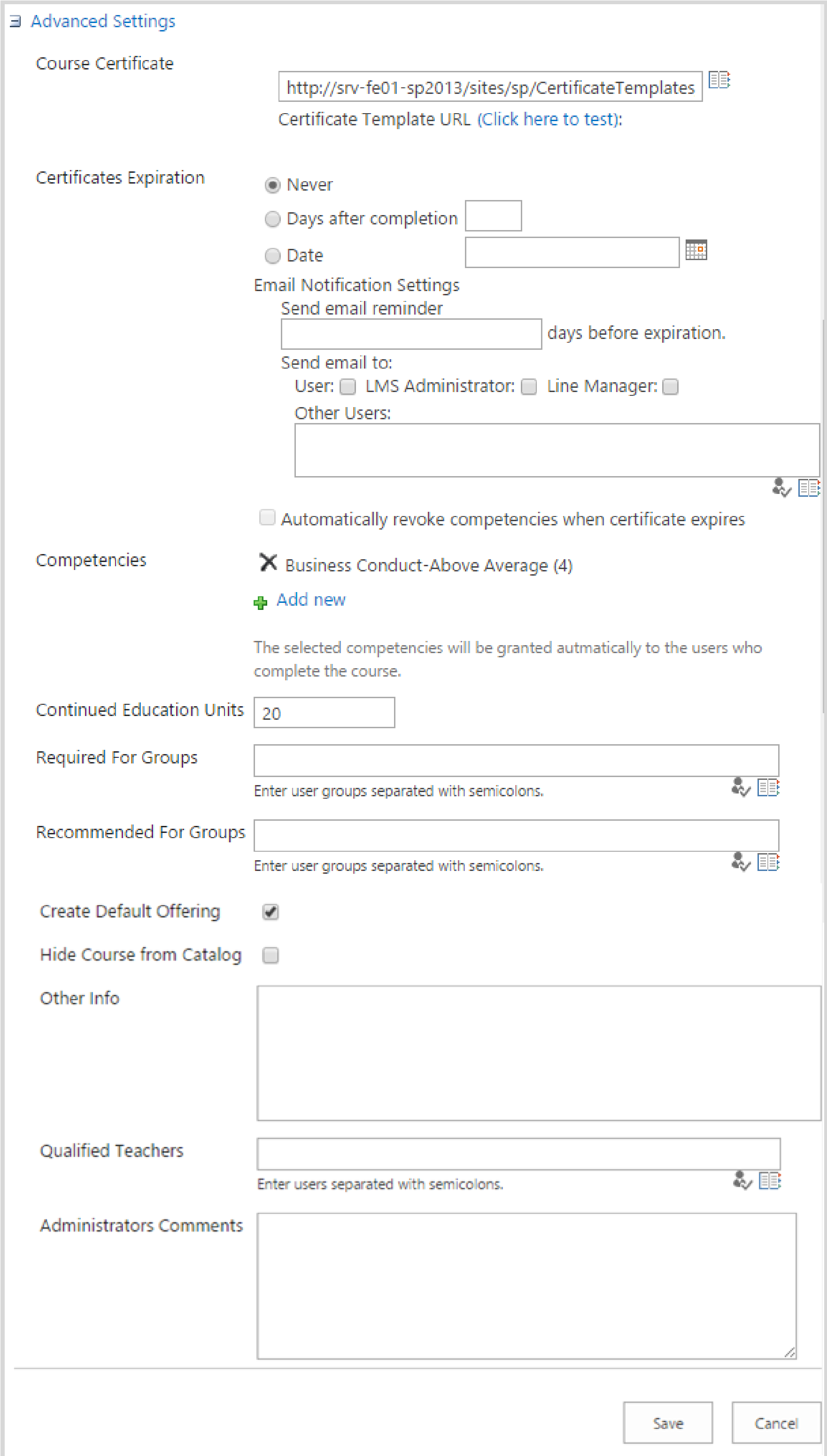
Depending on the Course type, course creation form has some differences, but most settings are the same for all course types:



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):



Here you can do the following:

- select Course Certificate template;

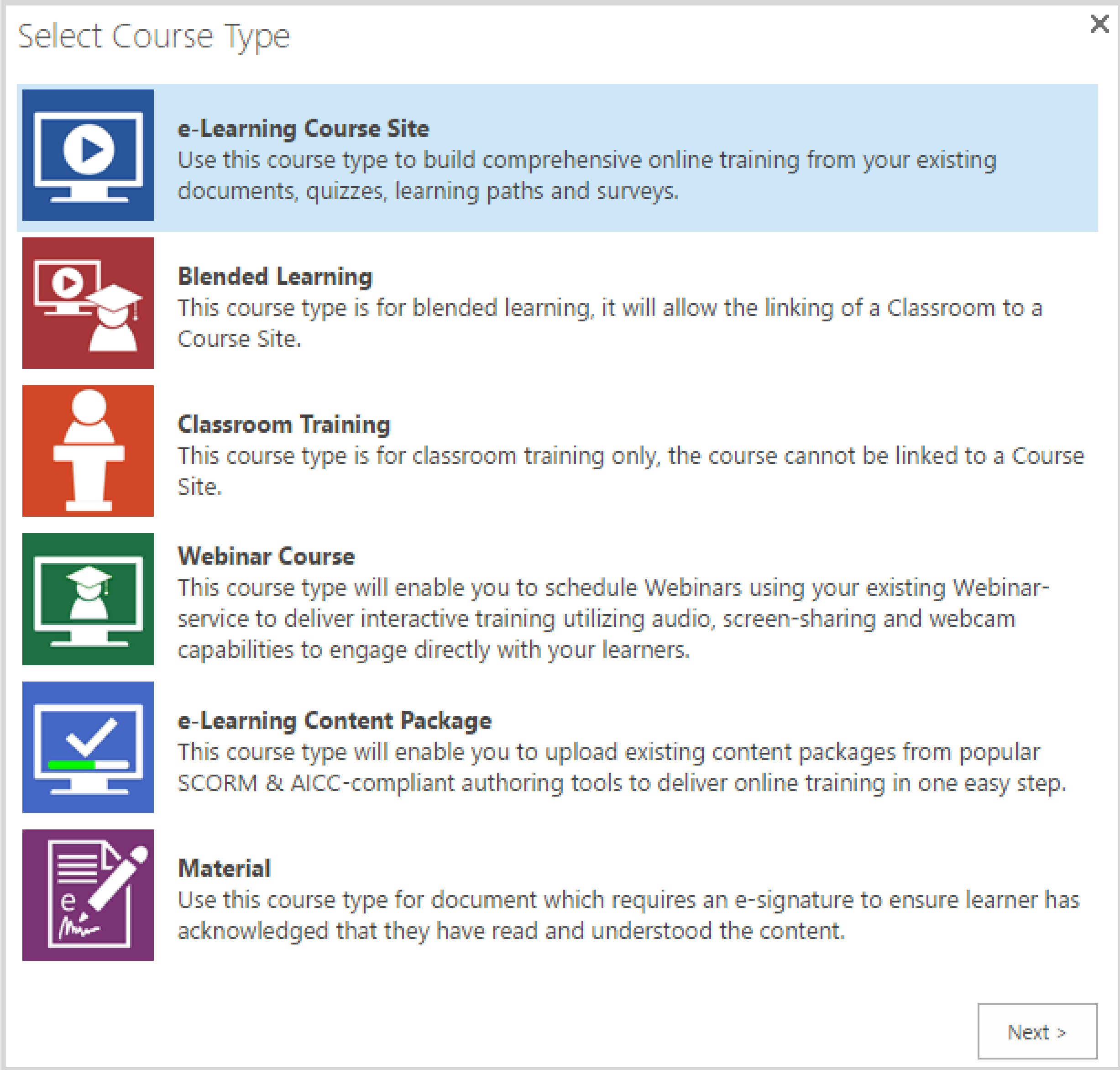
NOTE:	For e-Learning and Blended Learning Courses a Certificate template cannot be selected. Instead, certificate set for the related course in SharePoint LMS is used in these REM courses.

- 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.

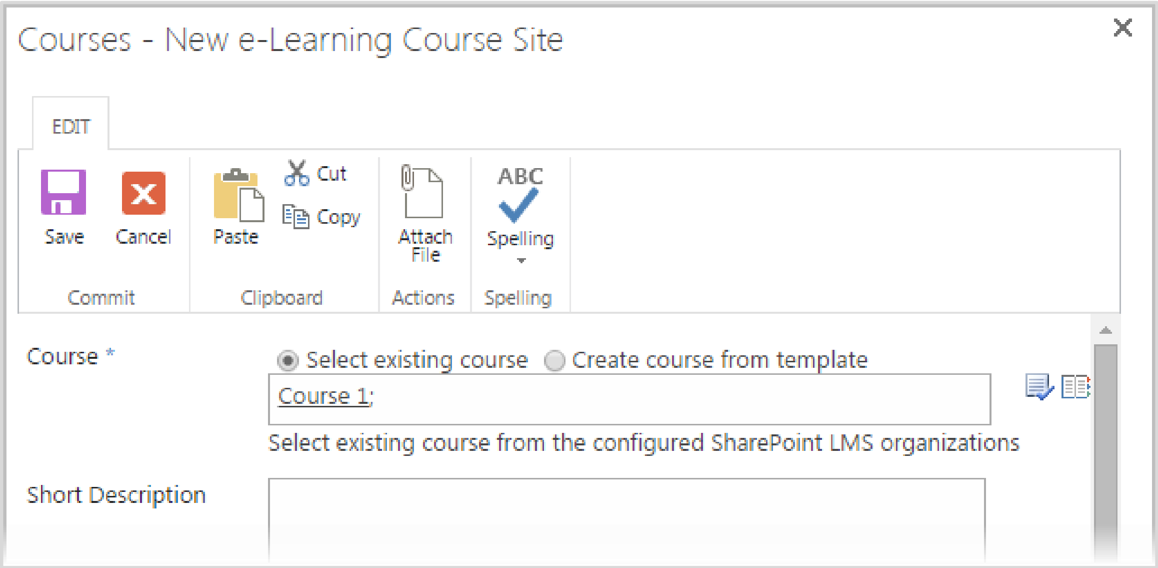
6.1 Creating e-Learning and Blended Learning Type Courses

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:



3. 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.

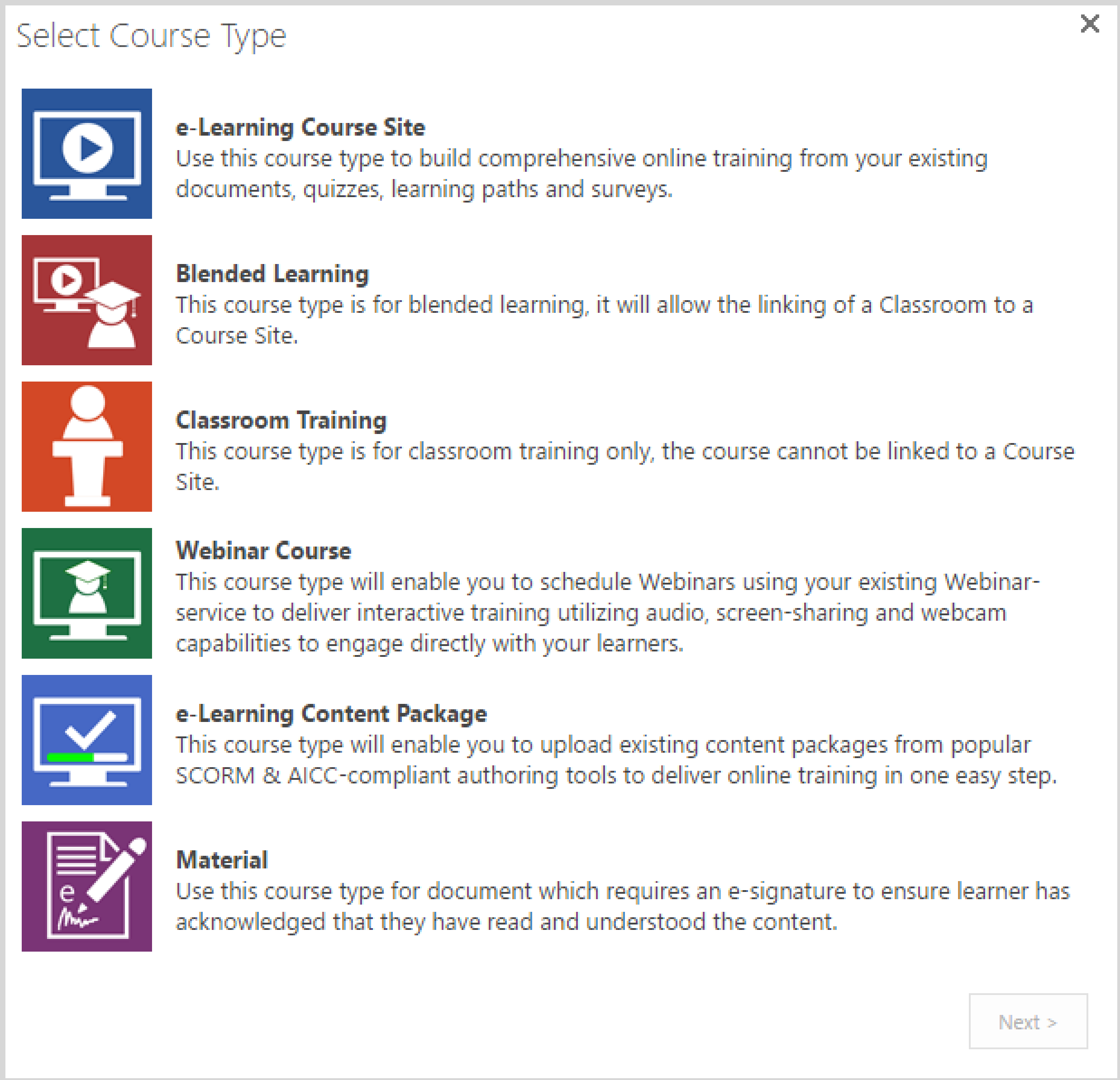
NOTE:	When you select an existing course, values for 'Short Description', 'Teachers', 'Published', 'Start Date' and 'End Date' fields are taken from the selected SharePoint LMS course.

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:

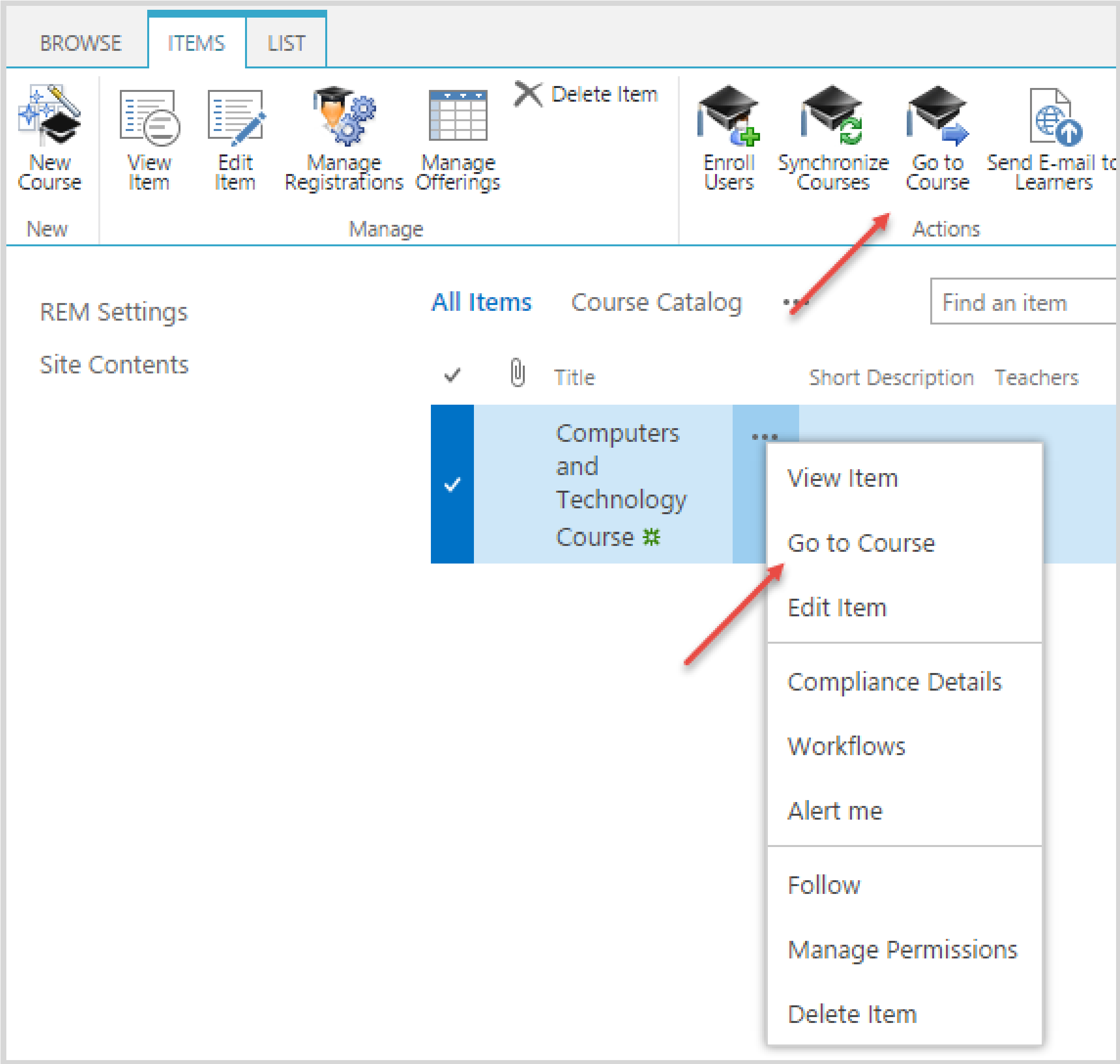


3. Complete the open form as described above.

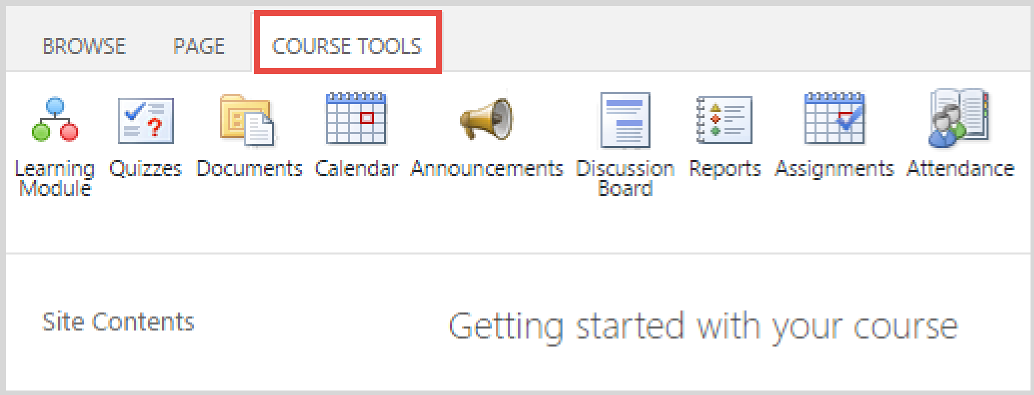
Remember that you can create Webinar, e-Learning Content Package and Material type courses only after features activation. They are as follows: ELEARNINGFORCE – REM: Webinar feature, ELEARNINGFORCE – REM: e-Learning Content Package feature, and ELEARNINGFORCE – REM: Course Material feature. All these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



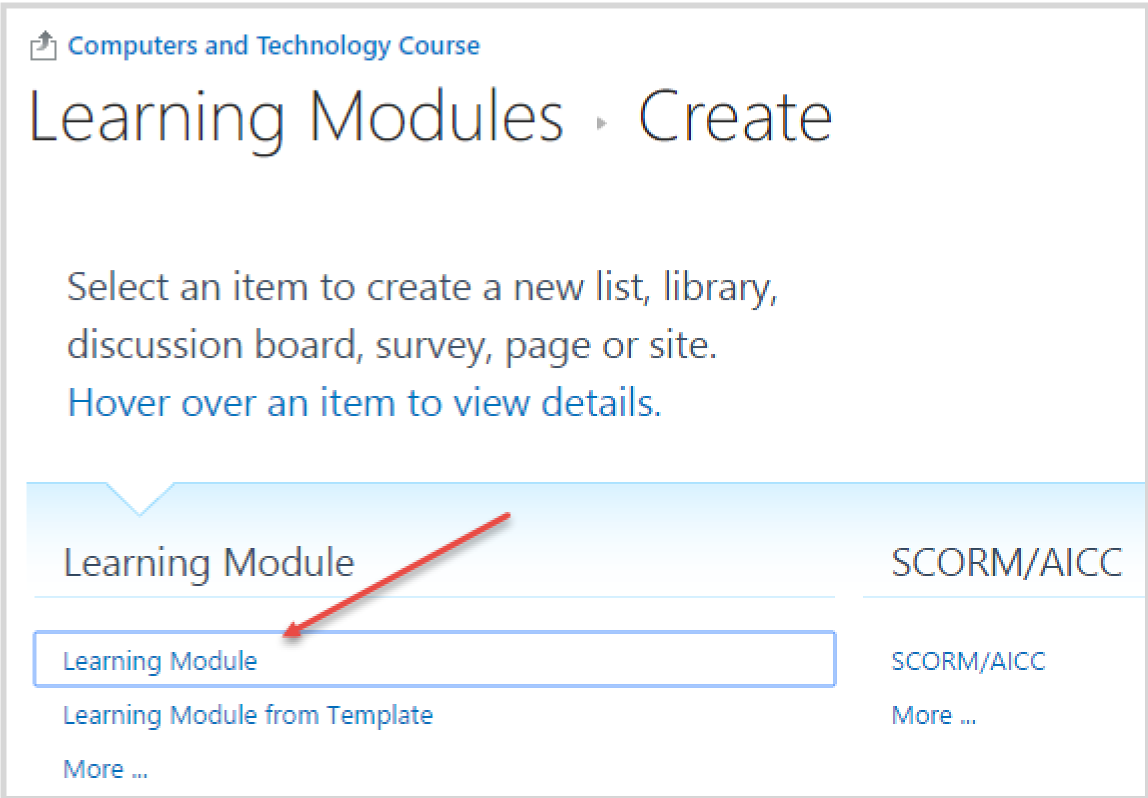
On the opened course site, click Course Tools:



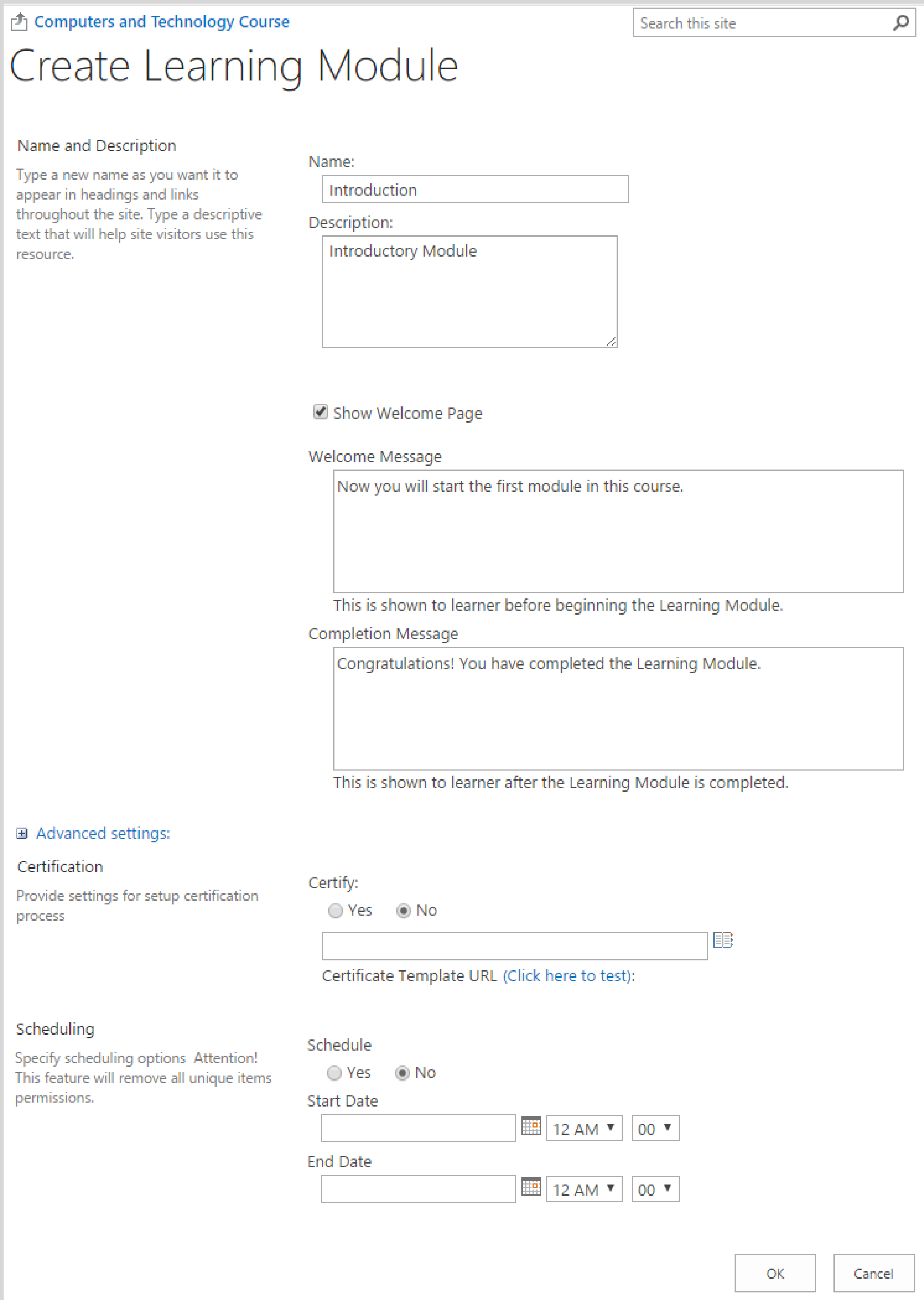
Here you can create Learning Modules (including SCORMs) and Quizzes.

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:



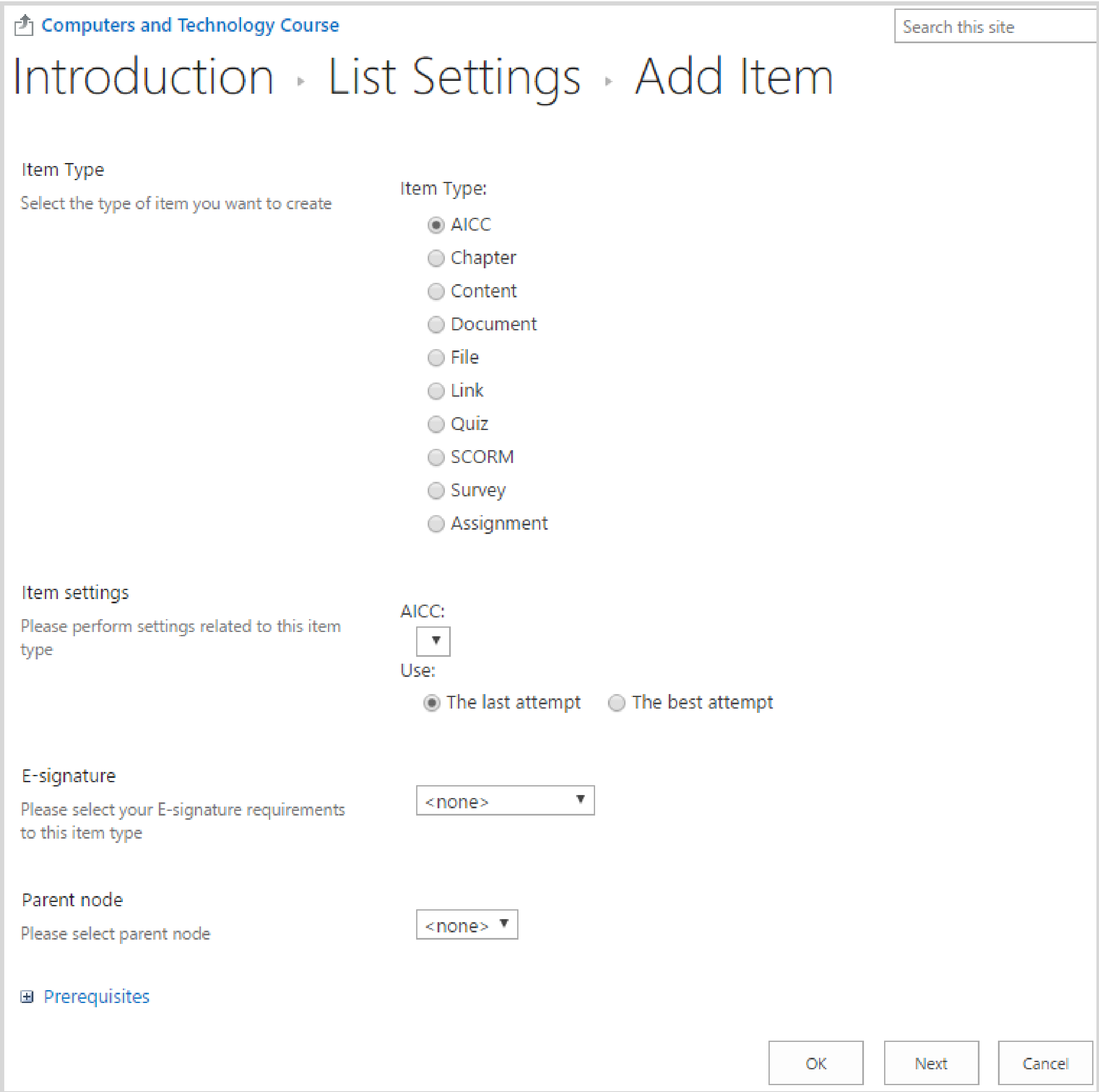
3. In the open form, fill in necessary fields:



Computers and Technology Course
Search this site
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:



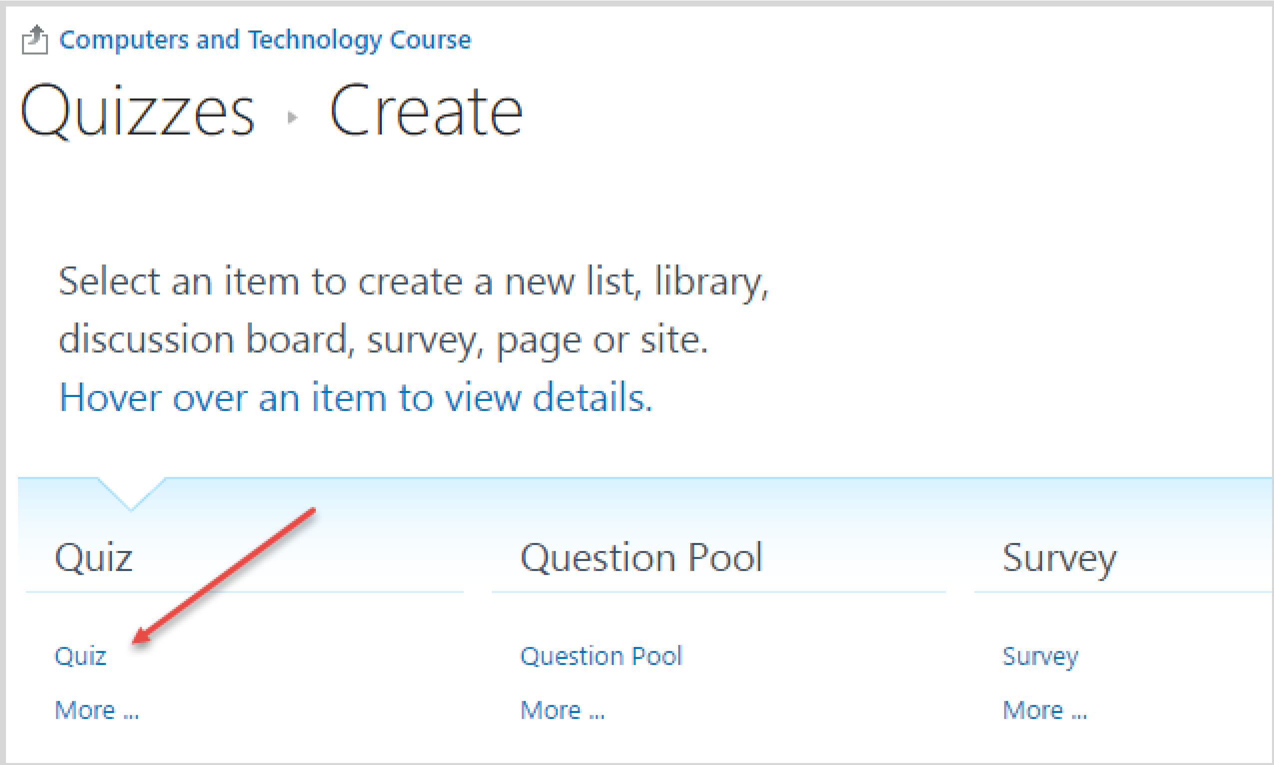
You can select from the following items:

- 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);

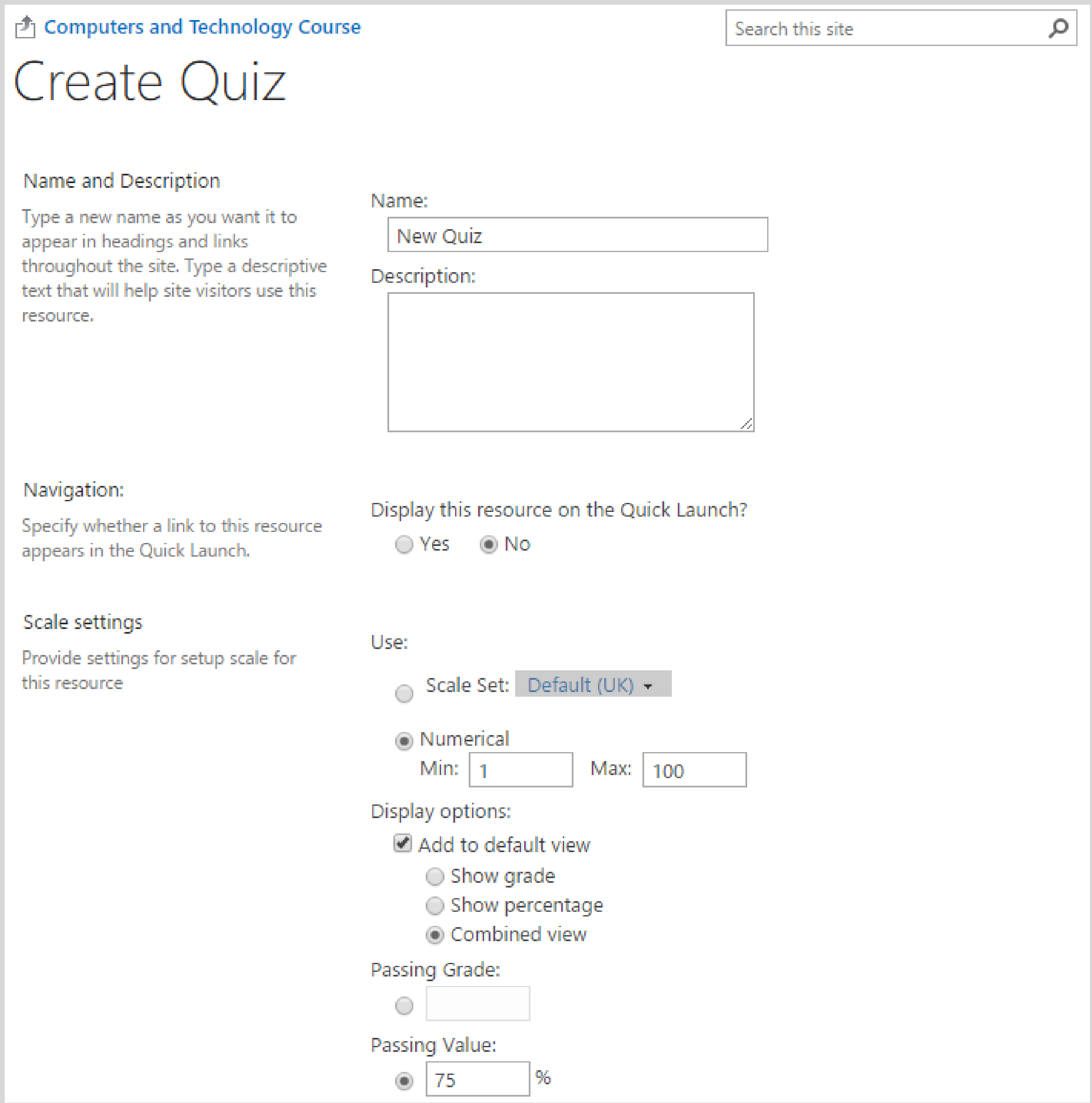
- Link (select from the links that have been created in the Links section of the course);
- Quiz (must be created in the Quizzes section first);
- SCORM (must be created in the Learning Modules section first);
- Survey (must be created in the Quizzes section first; it can be used to get some feedback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

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

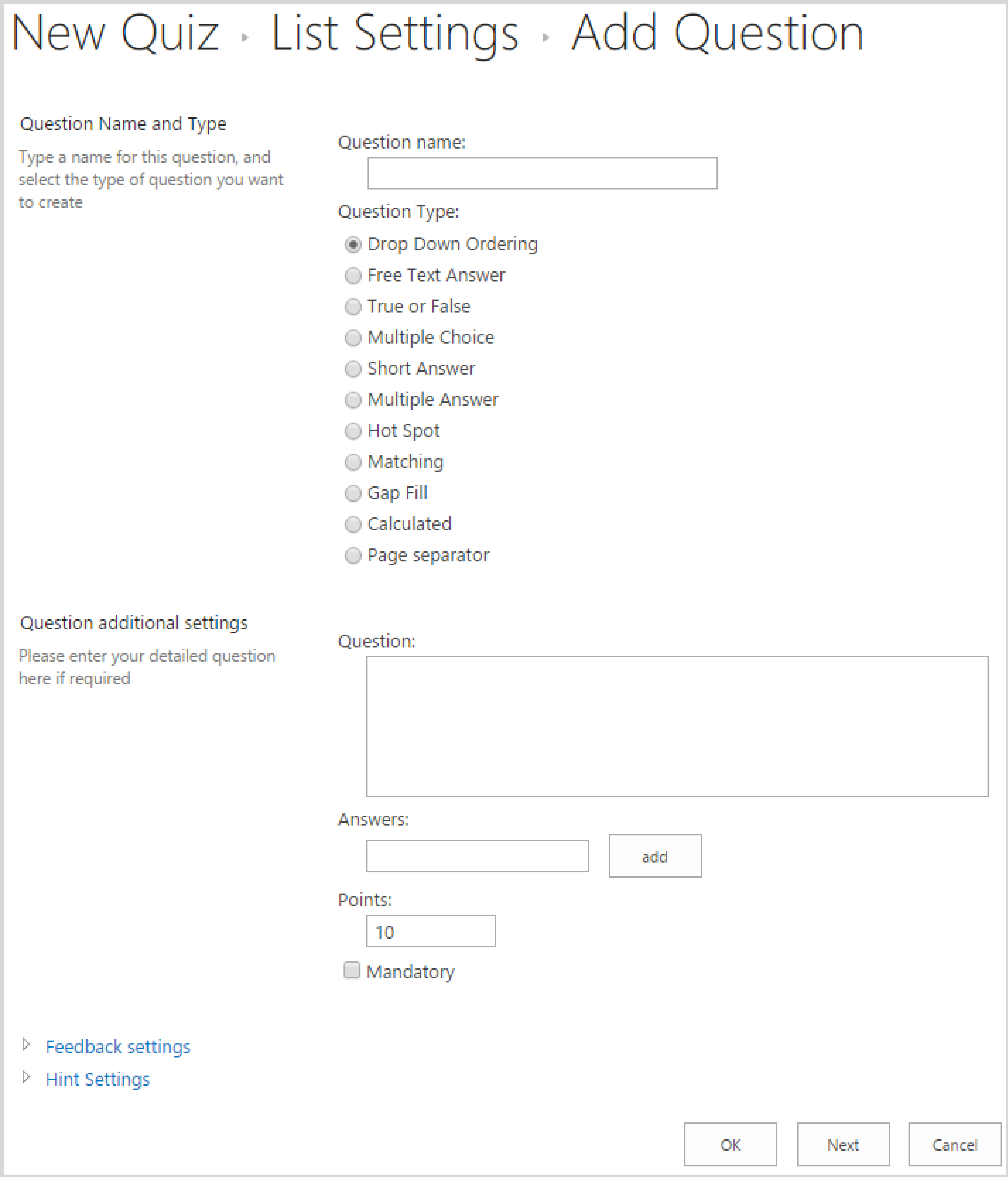
1. Click Quizzes in the Course Tools menu, and then click Create button at the top of the page;
2. Select Quiz:



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



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:



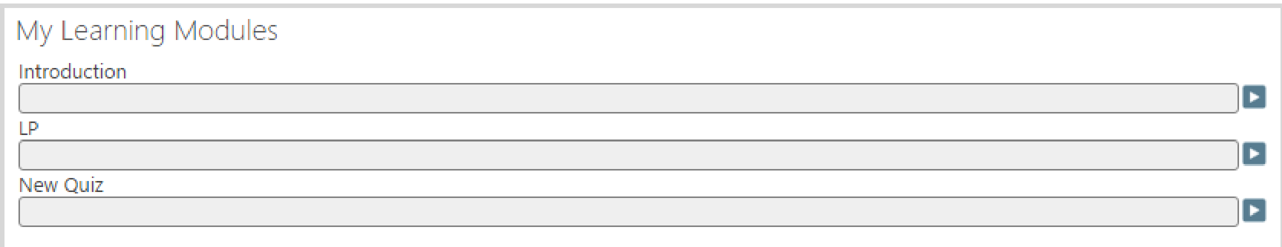
There are several question types available for adding, and you can use a variety of them within one quiz. First, you need to specify the name of the question, and then question type:

- 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.

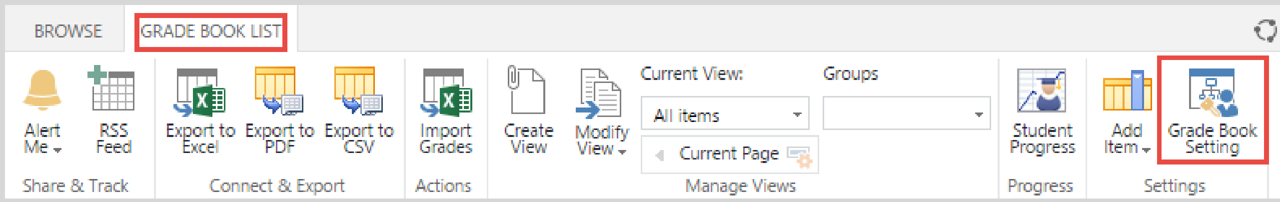
Now all created Learning Modules and Quizzes will be added to the Learning Modules web part:



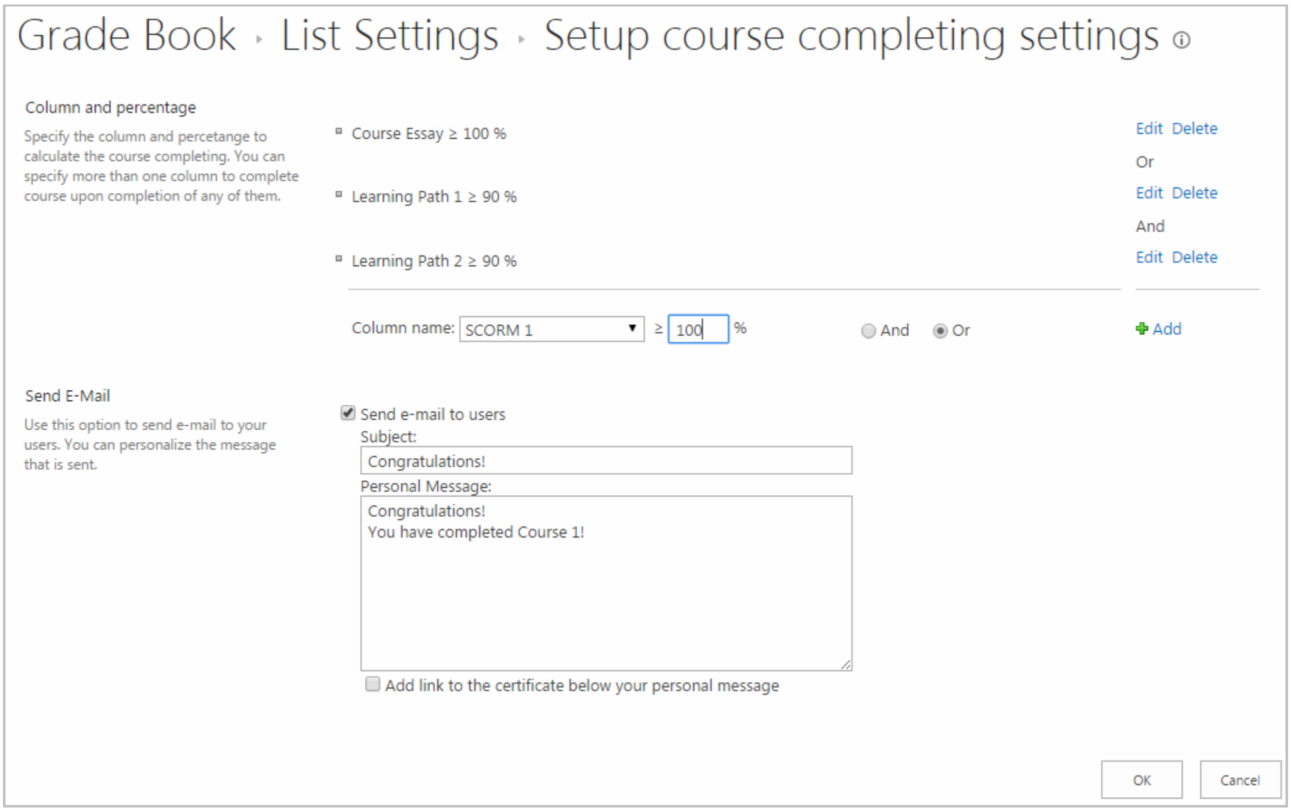
7.1 Setting up the Course Completion Settings

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:

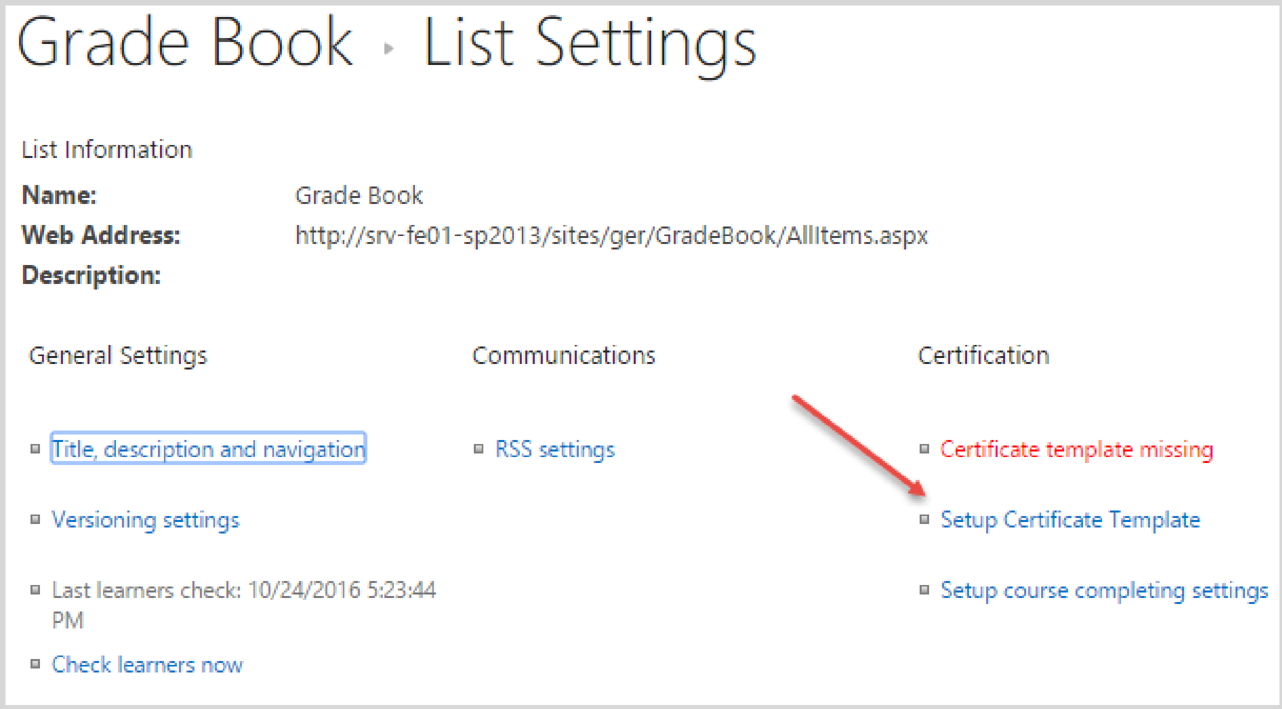


2. Select Setup course completing settings and fill the following form:

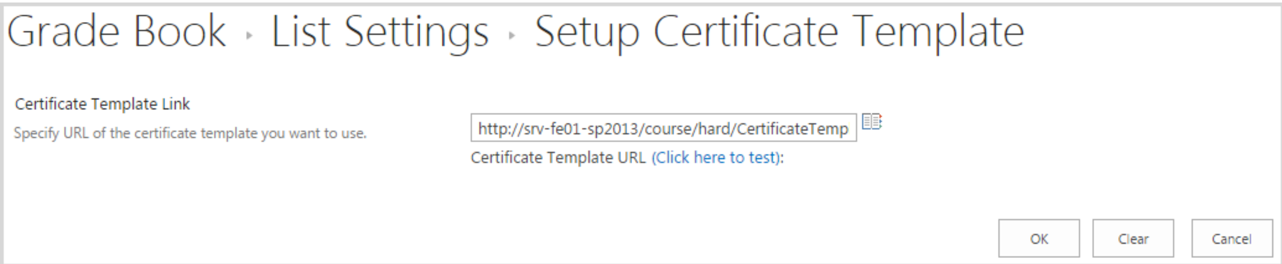


In the 'Column name' box select the title of the needed learning item from the drop-down menu, and then enter the pass mark percentage in the box next to the 'Column name' box. Select and/or radio buttons to set all (and radio button) or only one (or radio button condition obligatory for the course completion.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

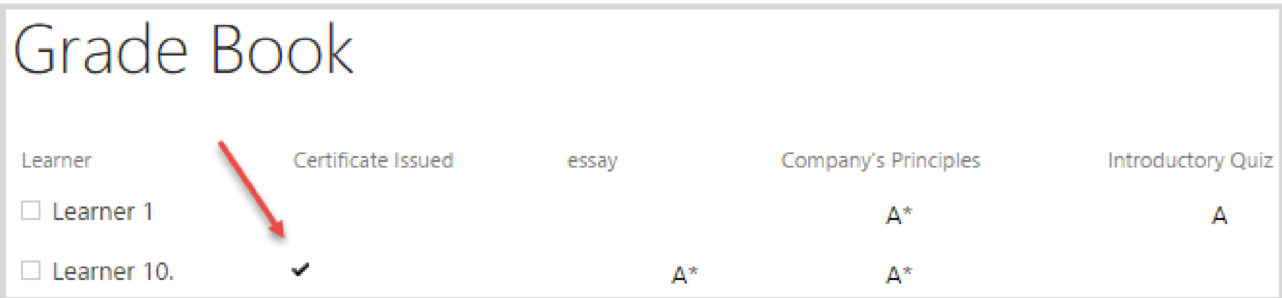
3. Assure you have also set up the course certificate; otherwise, course completion will not work. To set up the course certificate, click Setup Certificate Template in the Grade Book Setting section:



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:

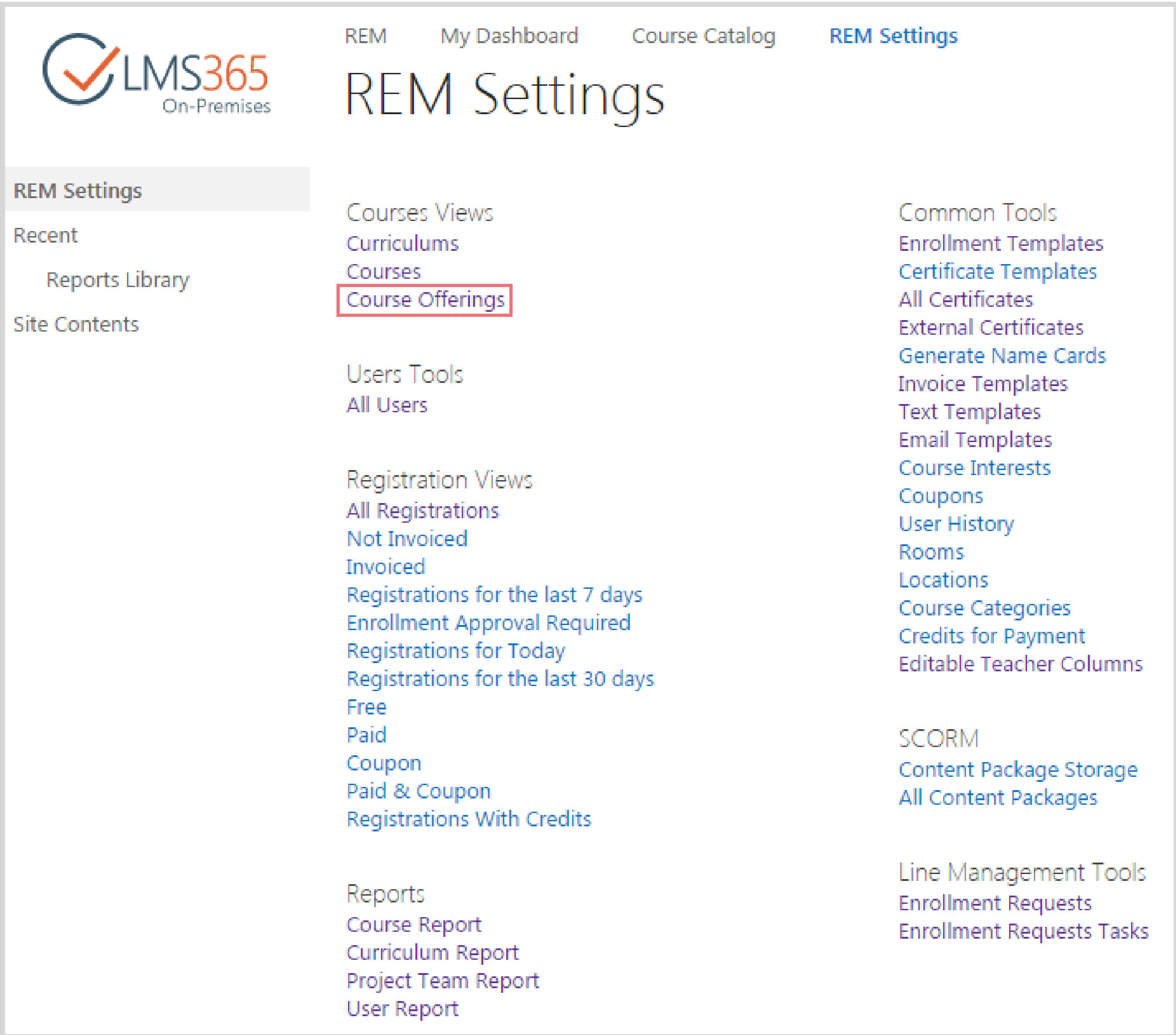


4. Now when a learner scores the number of points necessary to complete the course, he will be marked as a learner who completed the course in the Grade Book:



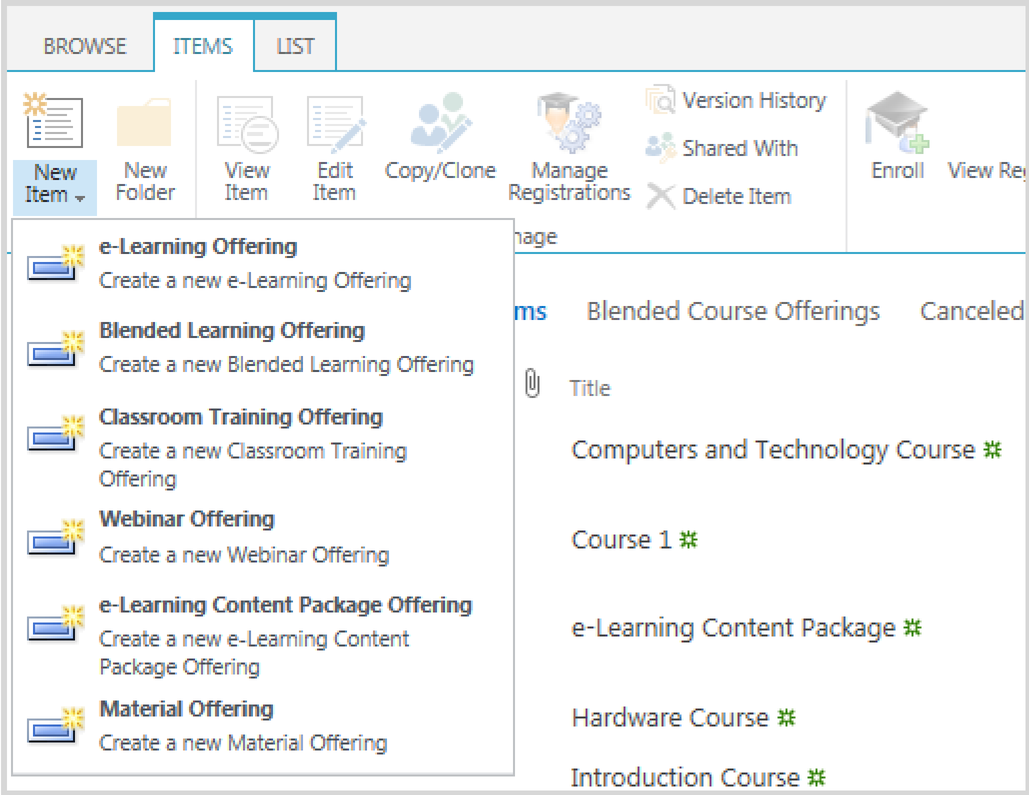
8. CREATING REM COURSE OFFERINGS

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:

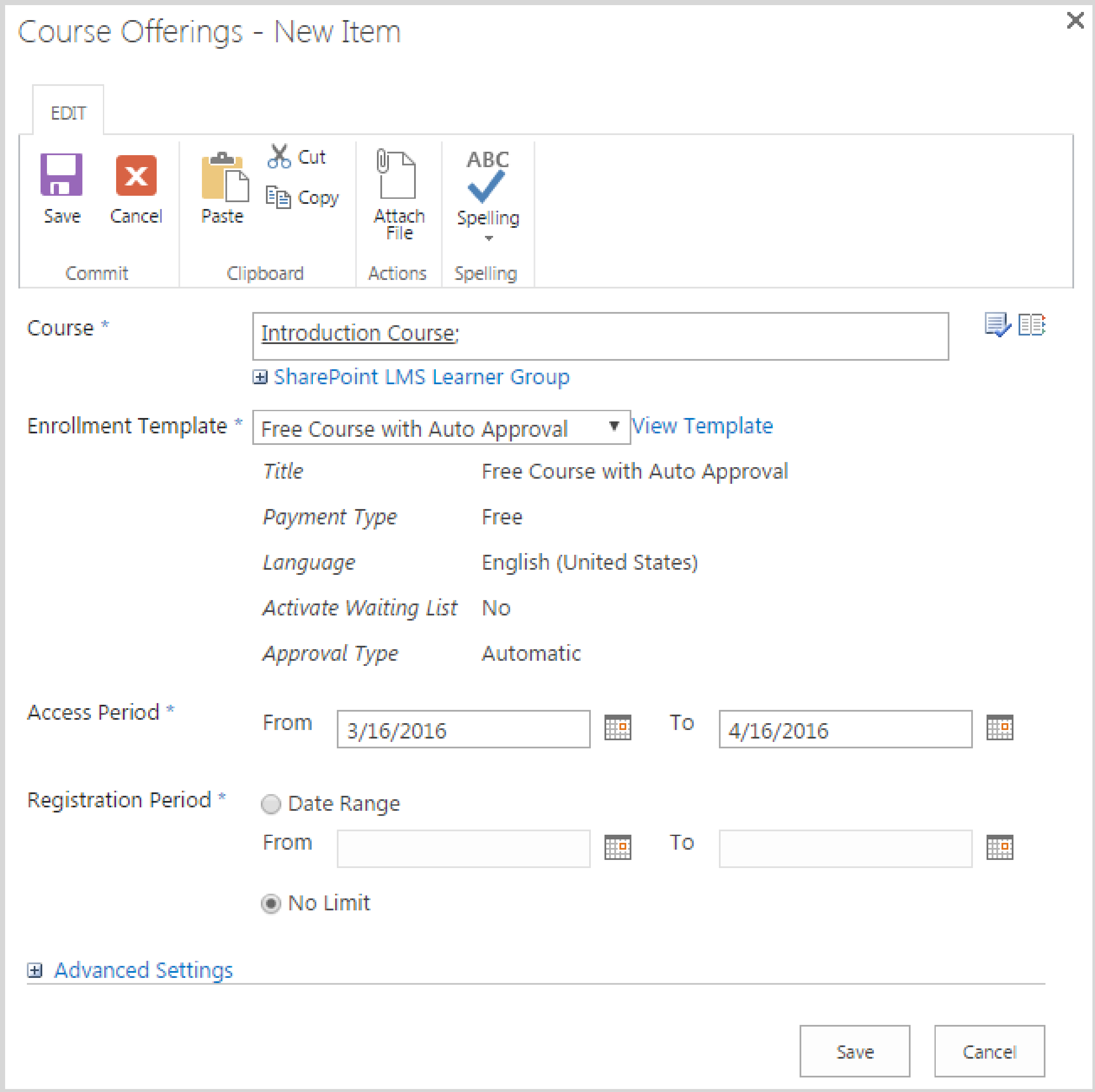


To add a new course offering, do the following:

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* – 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;

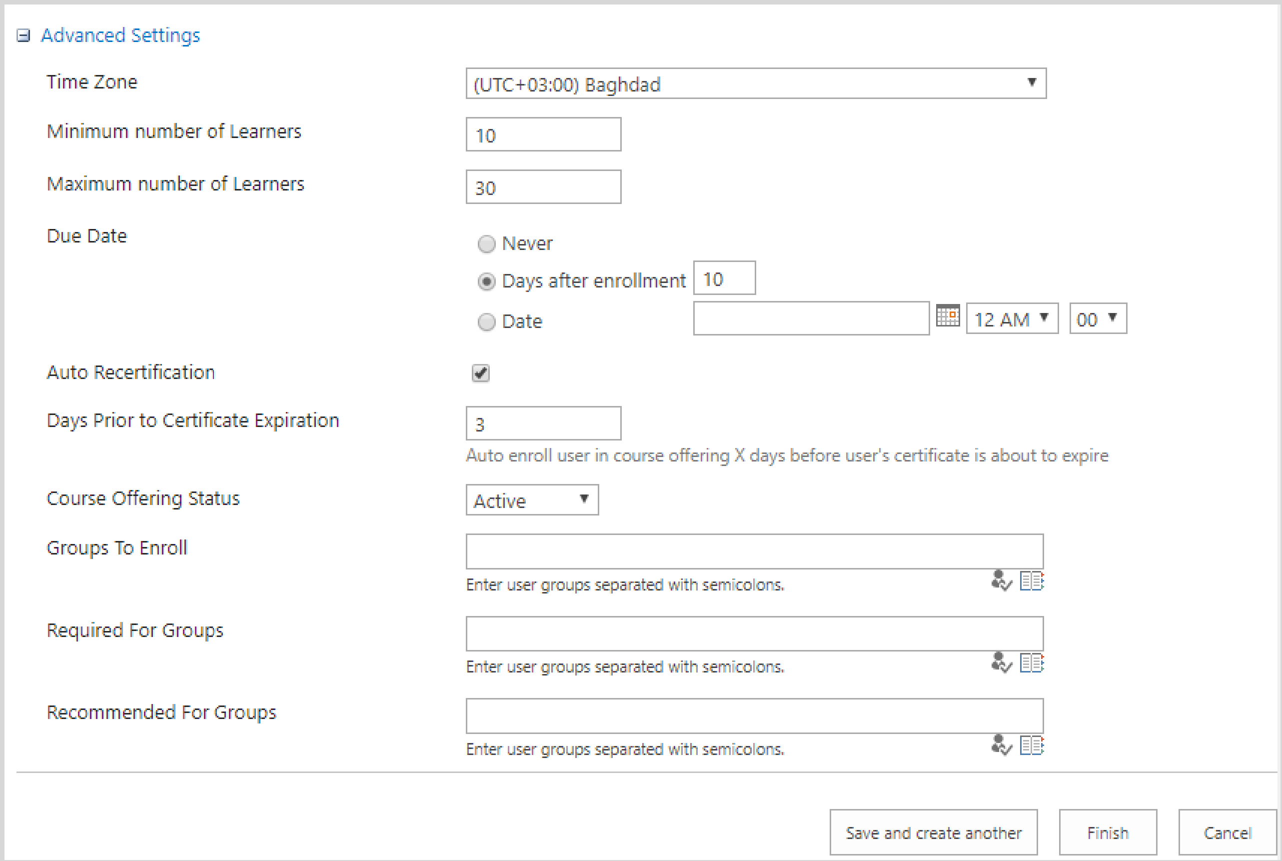
NOTE:	You can create unlimited number of Course Offerings associated with a certain SharePoint REM Course; the only condition is to differentiate Course Offerings by Access Period.

– *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:



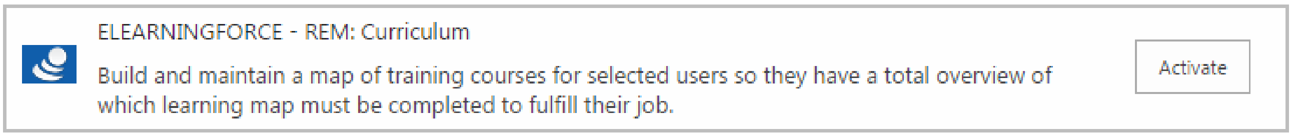
Here you can specify course time zone; set minimum number of learners for the course to be started, as well as the maximal number of learners that can be enrolled in this course (If this number exceeds, those learners will be added in the waiting list); specify the name of the instructors for this course; 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 ELEARNINGFORCE – 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.

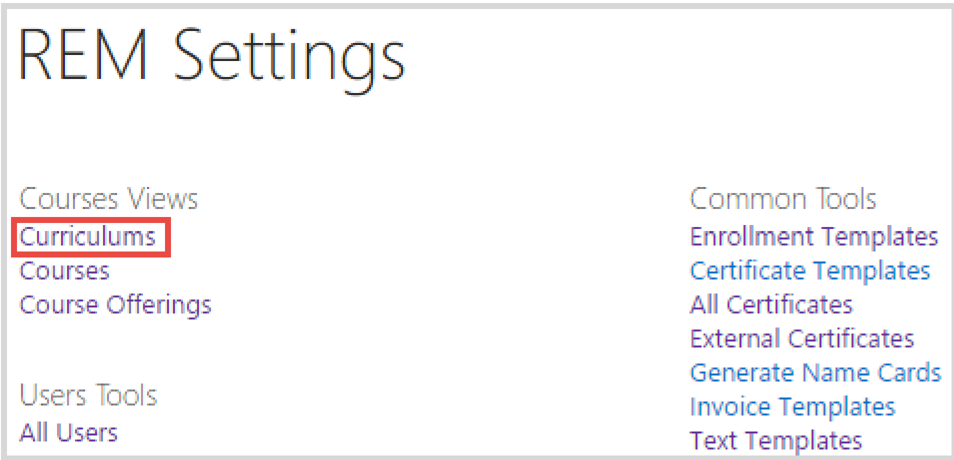
Depending on Course Type, Course Offering creation form has some different fields. See subchapter 4.1.10.1 of LMS365 On-Premises REM User Guide for details.

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 ELEARNINGFORCE – REM: Curriculum feature (go to Settings > Site Settings > Manage site features):

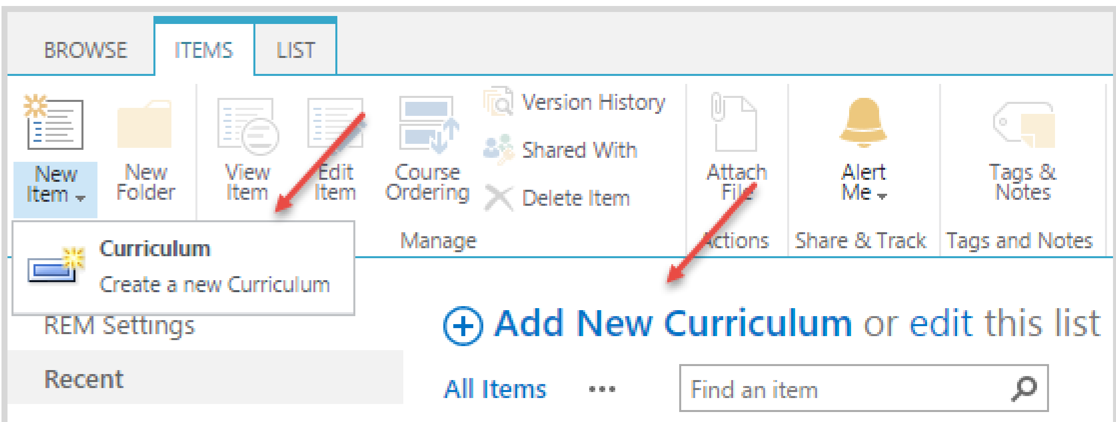


After feature activation, Curriculums functionality is available on the REM Settings page:

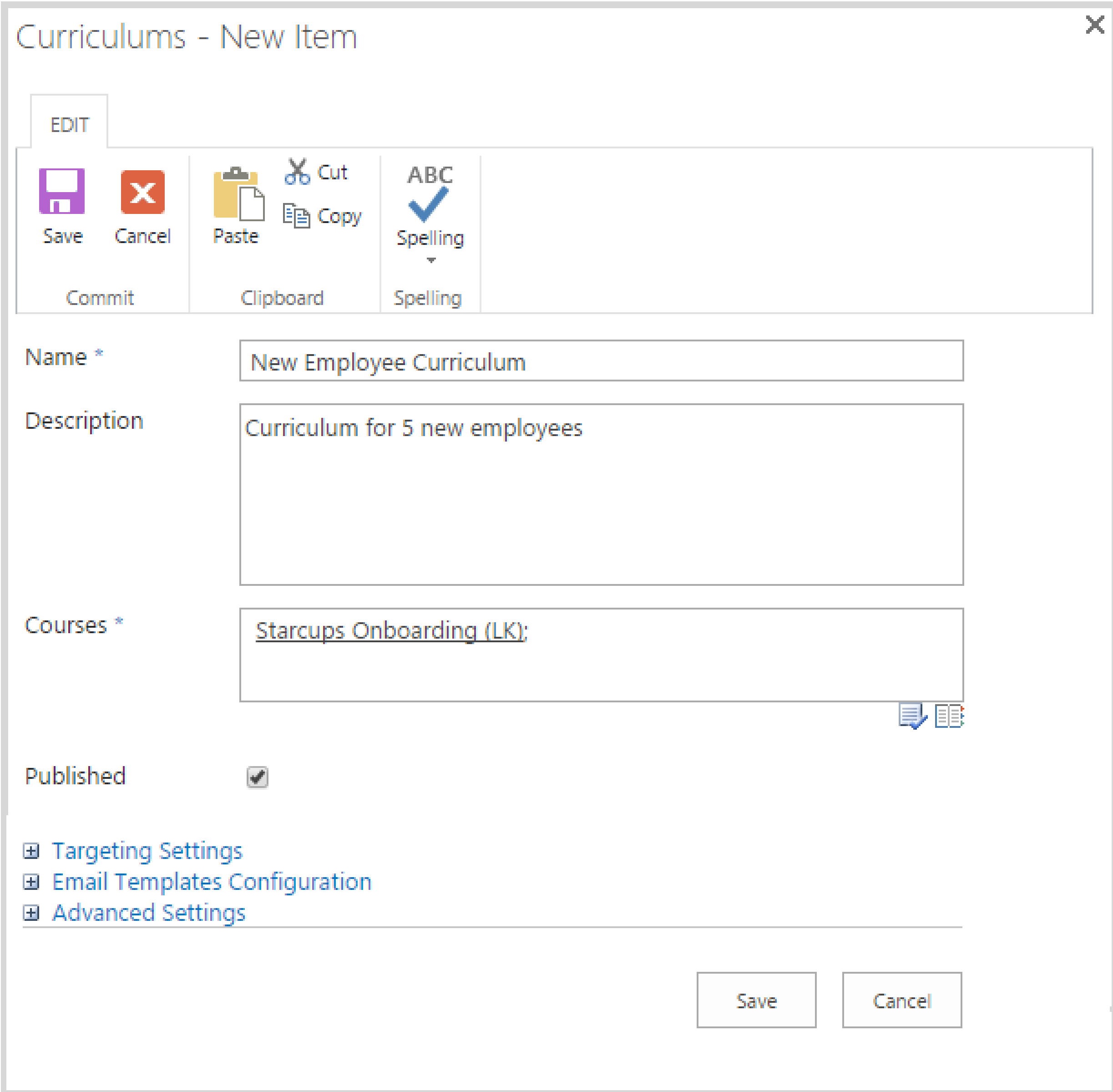


To add a new Curriculum, do the following:

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 :

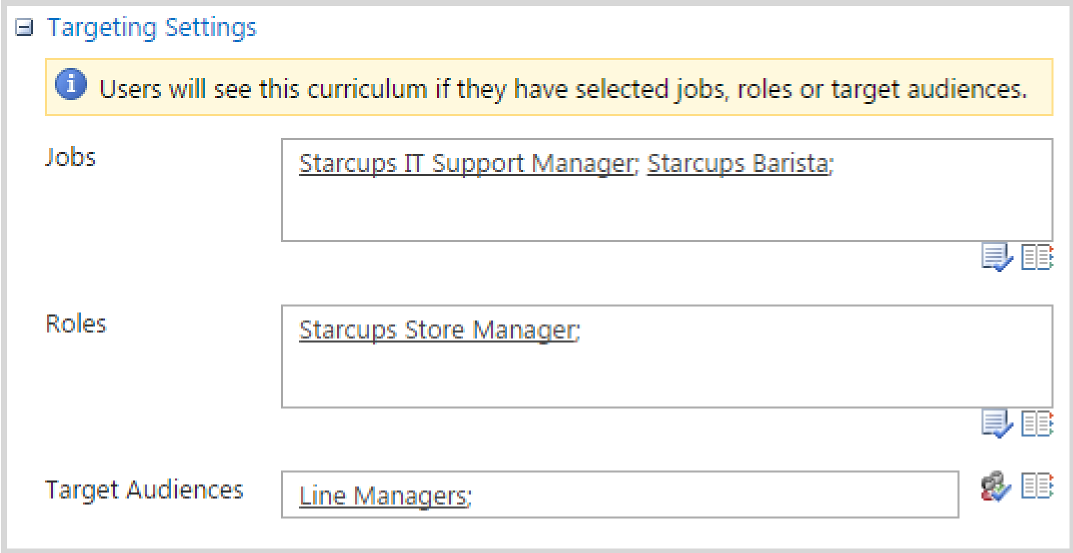


3. Fill in the open form:



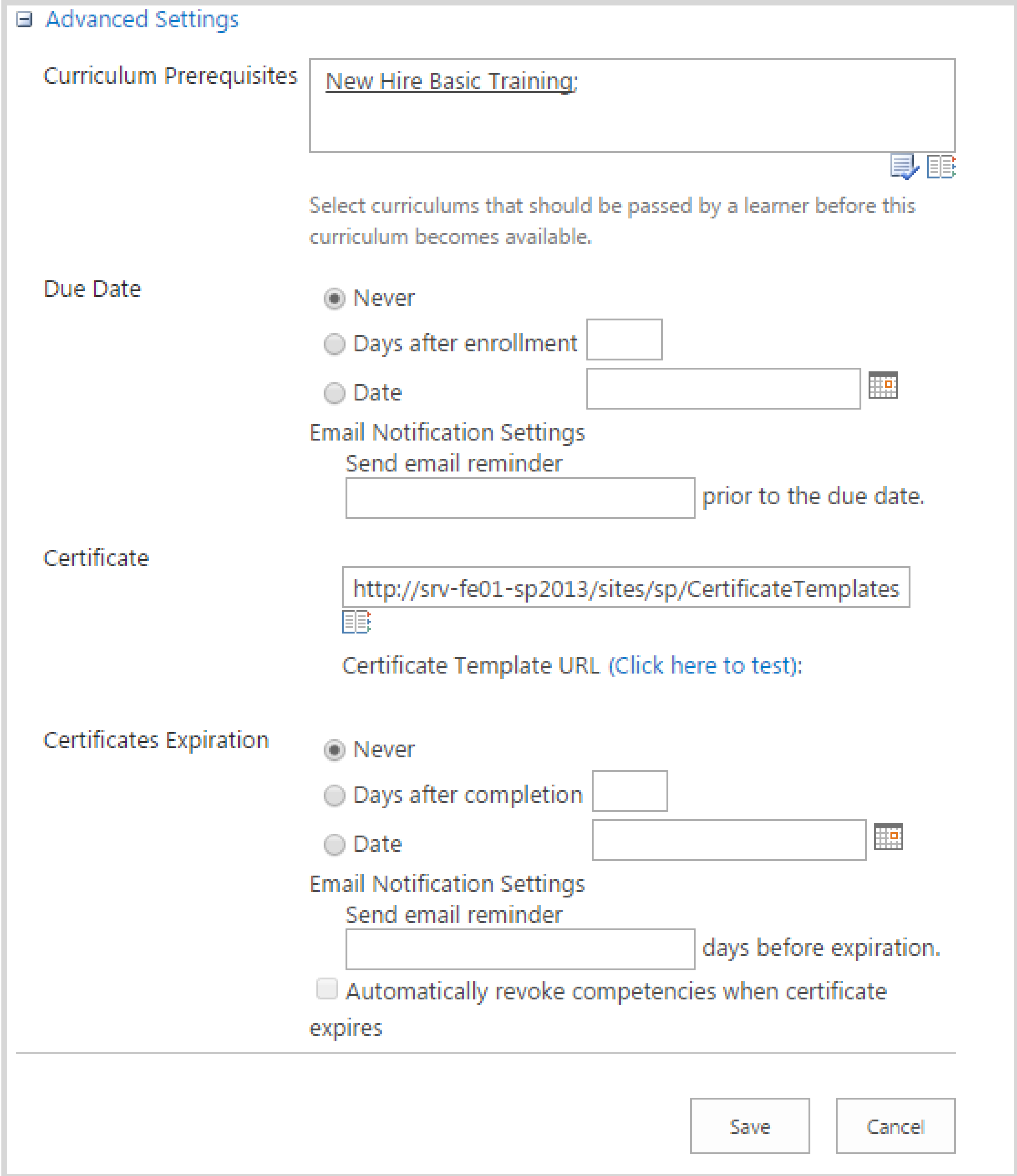
Specify the name of the curriculum, select courses (using course picker) that will be included in the curriculum, and select Published checkbox in order to show this curriculum in the Dashboard.

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:



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.

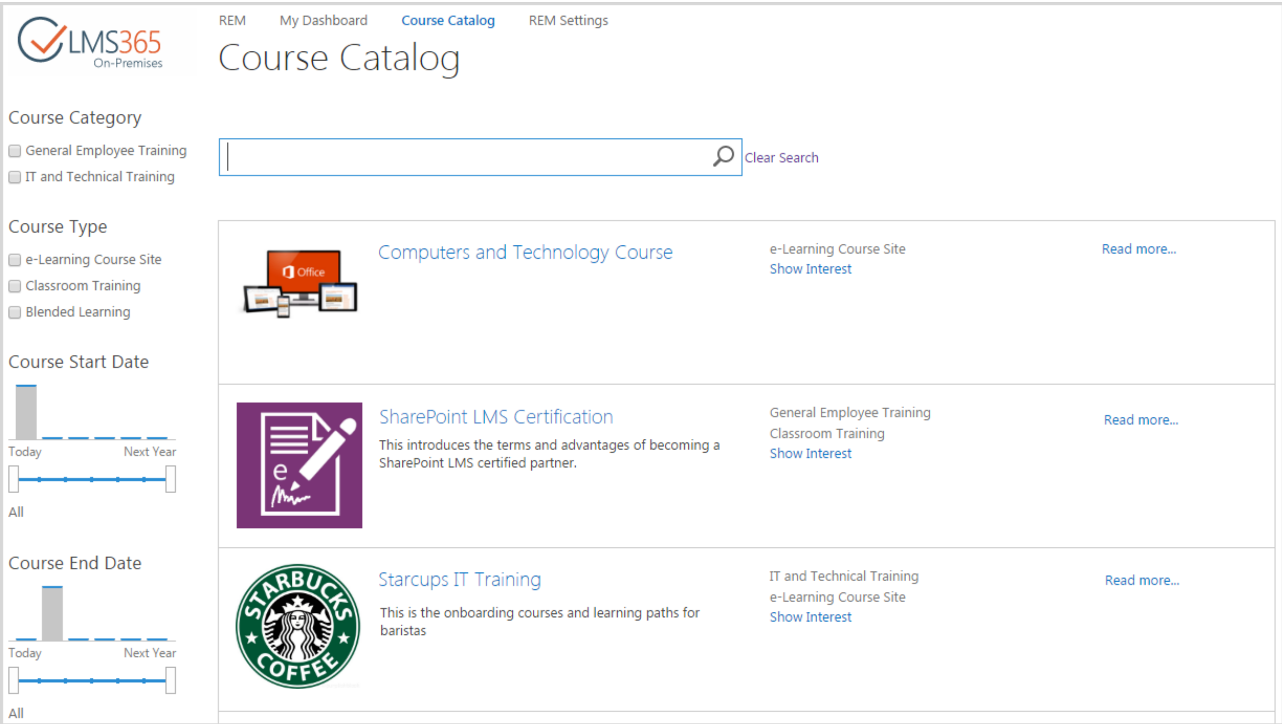
You can also use advanced settings to set curriculum prerequisites, set curriculum due date and certificate for the completion of the curriculum:



4. 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:



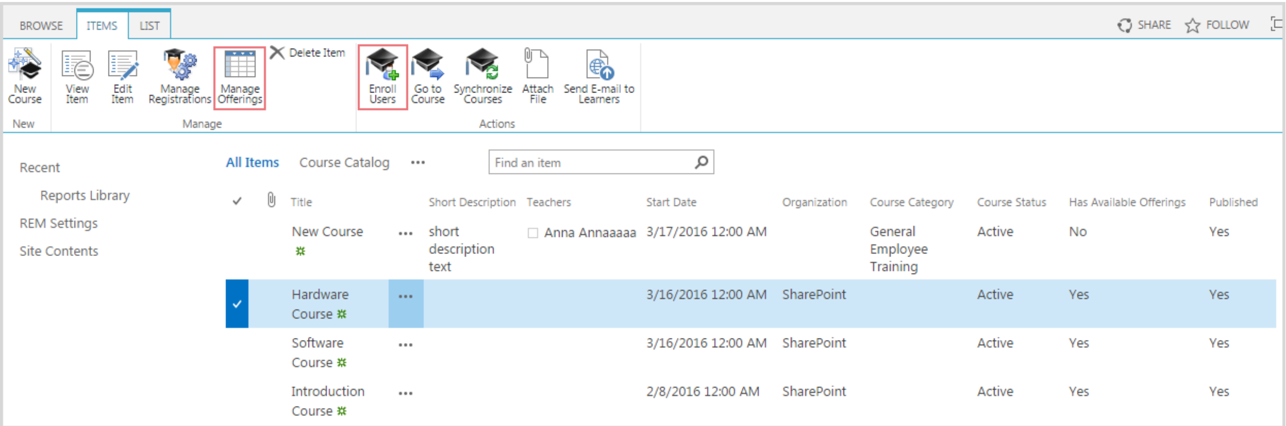
Remember that to see courses in the Course Catalog, you must start crawl process (it is necessary to index all content of the Course Catalog). See subchapter 1.6 of LMS365 On-Premises REM Administration Guide for details.

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.

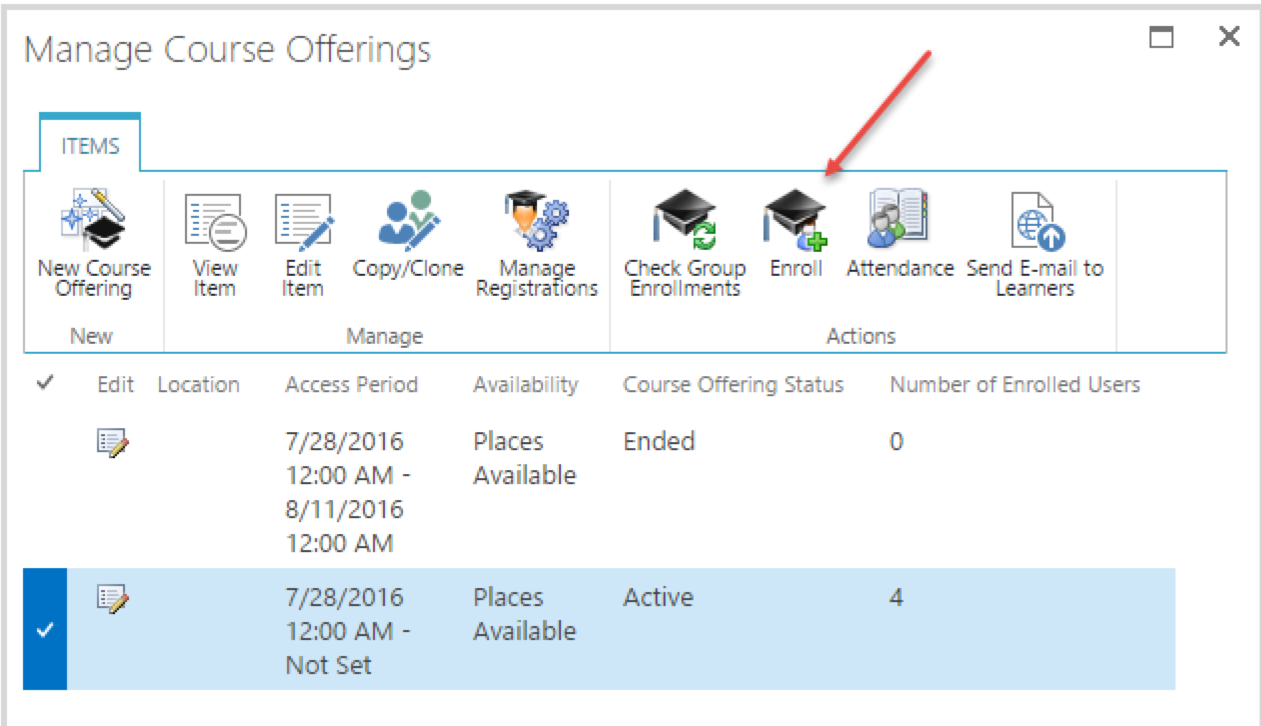
11. ENROLLING USERS INTO COURSES

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

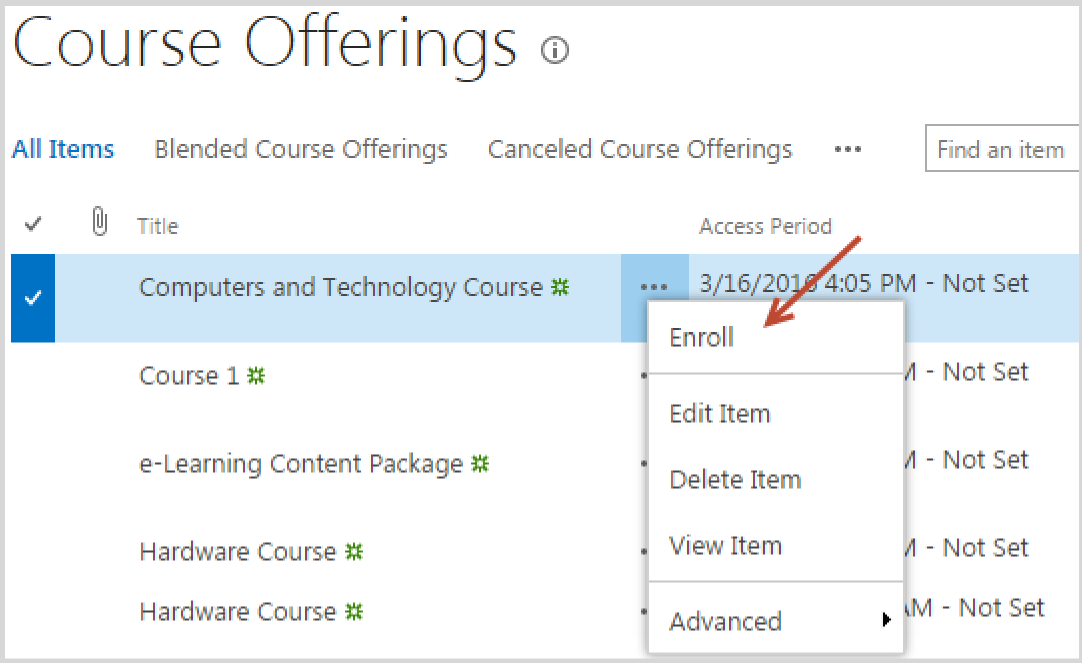
In the first case, go to the Courses list page, select the needed course, and then select Items > Manage Offerings or Enroll Users from the ribbon menu:



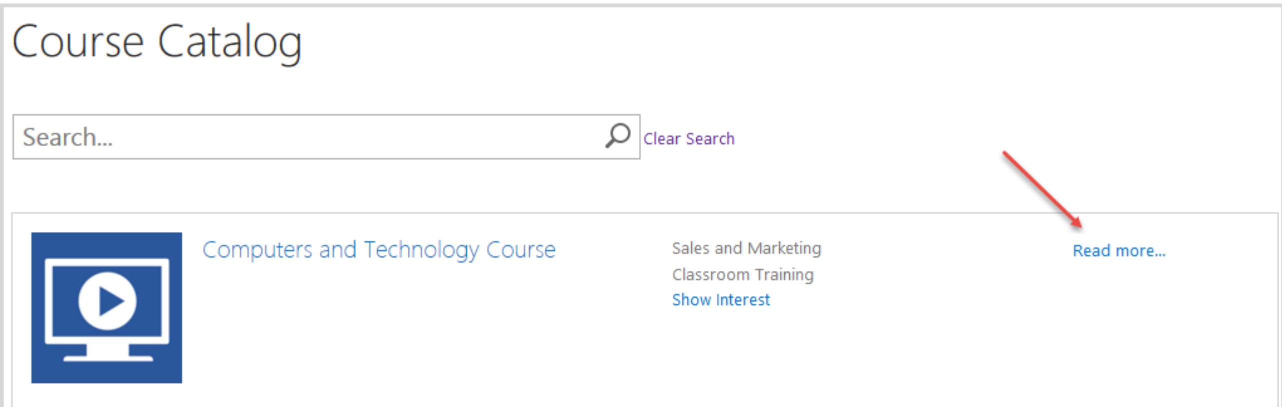
Then, select the needed Course Offering from available and click 'Enroll' in the ribbon menu:



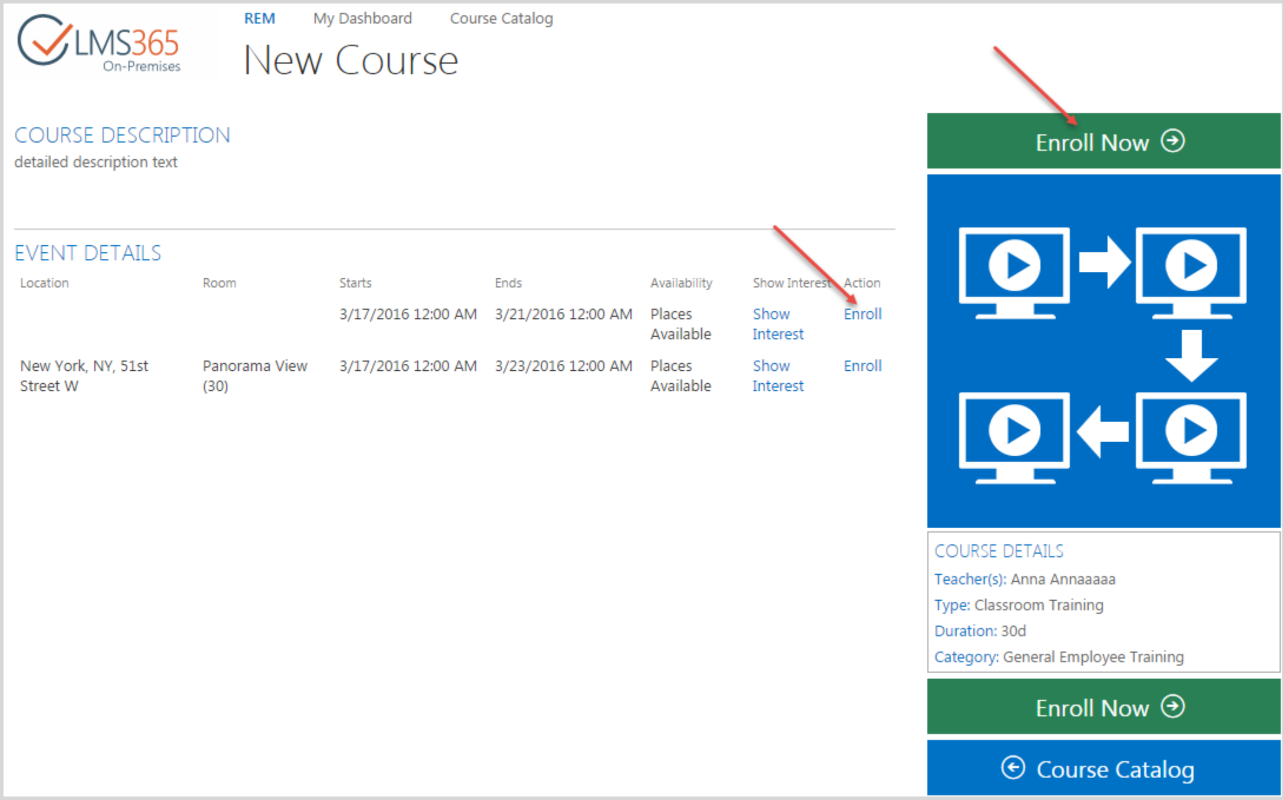
In the second case, go to the Course Offering list page, the callout menu next to the needed course, and then select Enroll from the list:



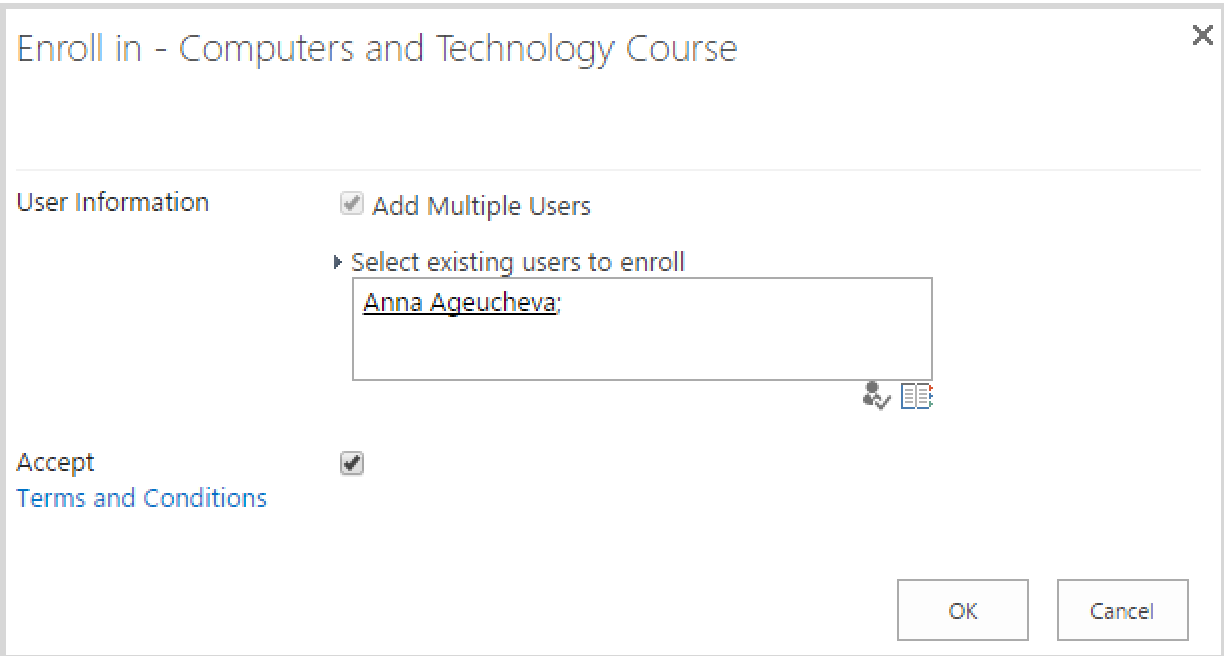
In the third case, go to the Course Catalog page, and click 'Read more' link next to the course in which you want to enroll learners:



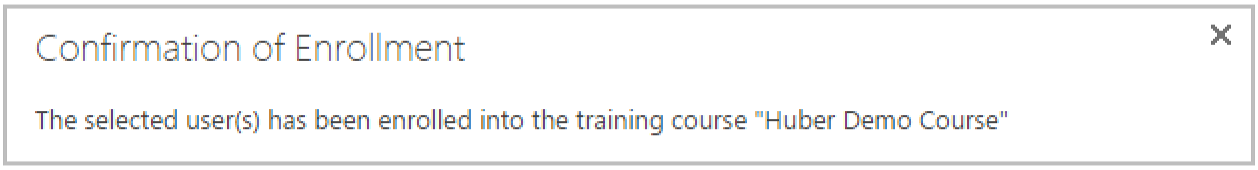
On the open page, select course offering in which you want to enroll learners or click 'Enroll Now' button:



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

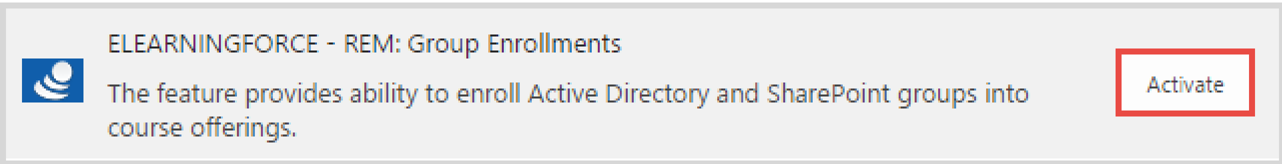


Select users you want to enroll in the course, select Accept checkbox, and then click OK button. An Enrollment Confirmation message will be displayed to confirm successful enrollment:



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:



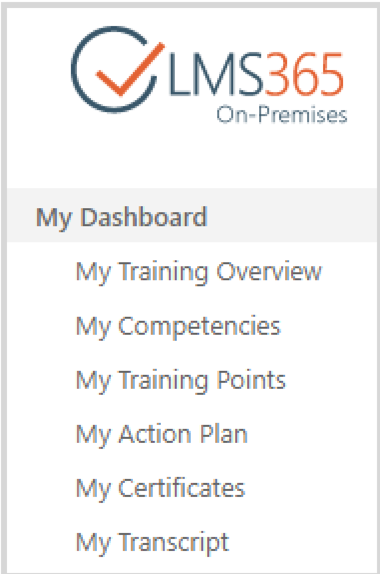
Now you will be able to enroll groups into courses. Follow the logic described above to open the Enrollment form, and then enter group title in the login name field instead of a single user and click OK button. All users from the group you have specified will now be enrolled in the course.

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 ⓘ

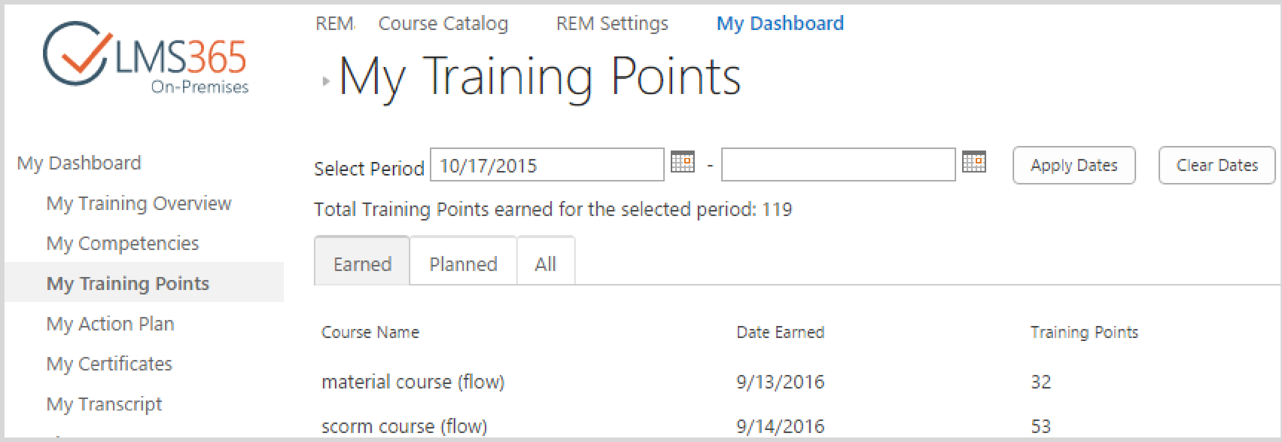
2. My Competencies – here the list of user's competencies is shown. There are four tabs: Held, Required, Revoked and All:

My Competencies

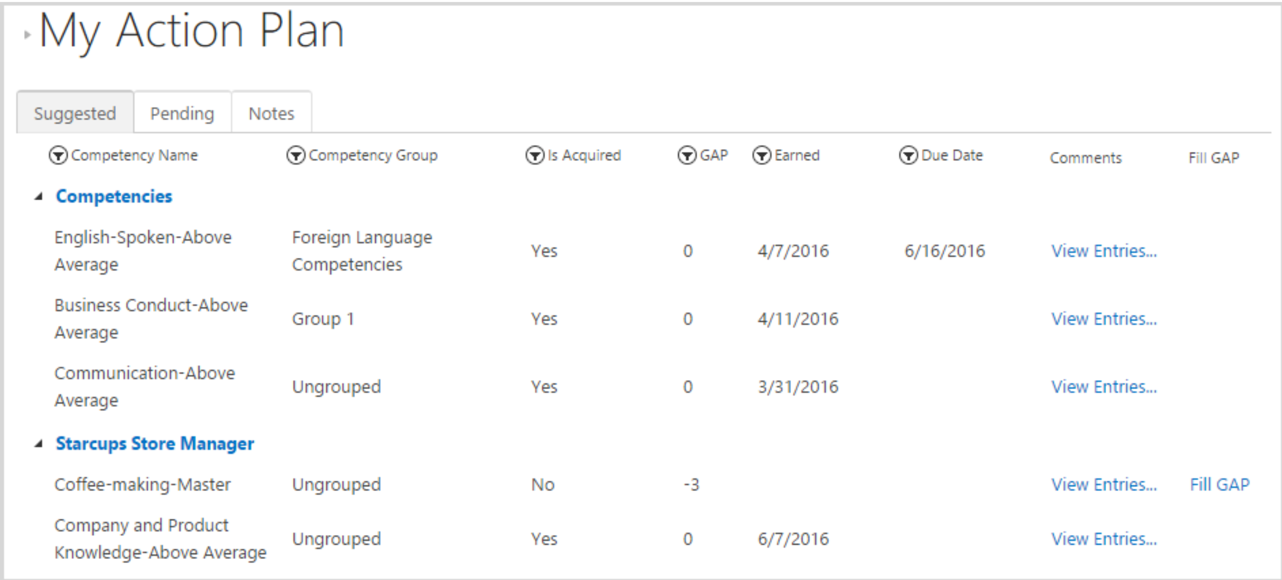
Held | Required | Revoked | All

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...	

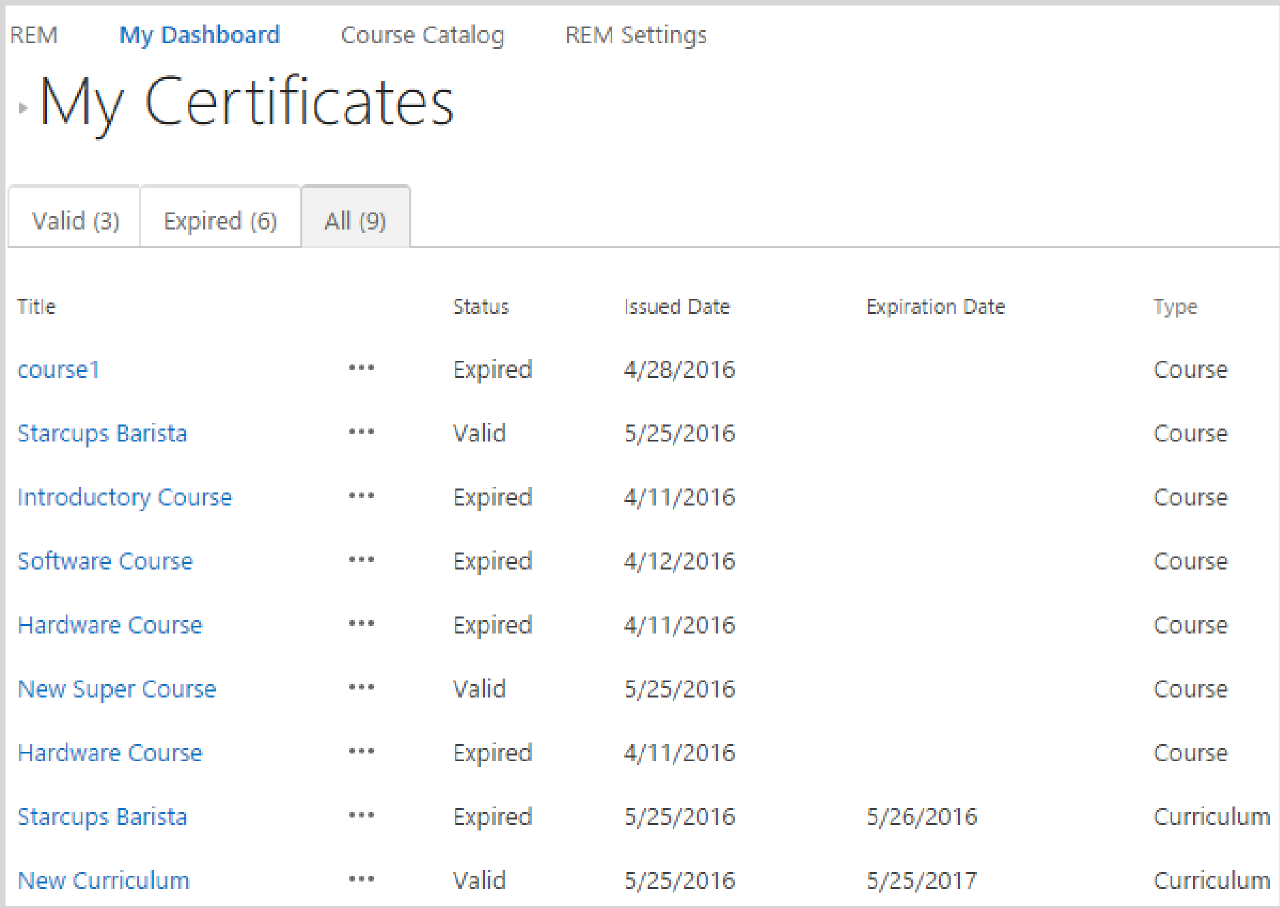
3. My Training Points – here the list of user's Training Points is shown. You can switch between Earned (default view) and Planned (Training Points from the courses with 'Waiting For Start Date' status are also displayed in this tab) views and see All Training Points. Use the Select Period field to search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



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:



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:

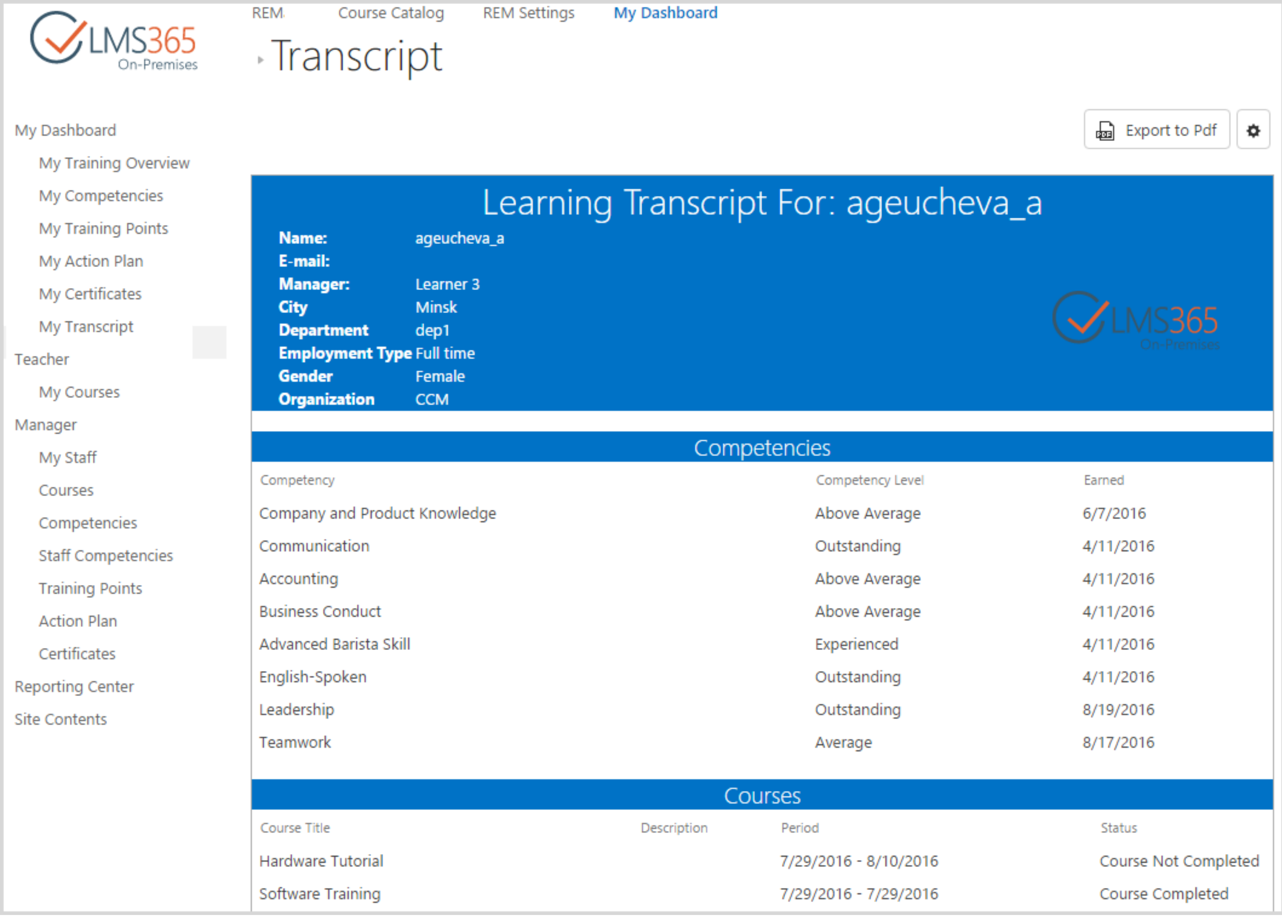

REM My Dashboard Course Catalog REM Settings

My Certificates

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

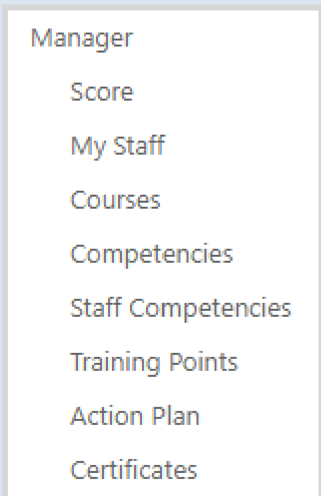
Title		Status	Issued Date	Expiration Date	Type
course1	•••	Expired	4/28/2016		Course
Starcups Barista	•••	Valid	5/25/2016		Course
Introductory Course	•••	Expired	4/11/2016		Course
Software Course	•••	Expired	4/12/2016		Course
Hardware Course	•••	Expired	4/11/2016		Course
New Super Course	•••	Valid	5/25/2016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



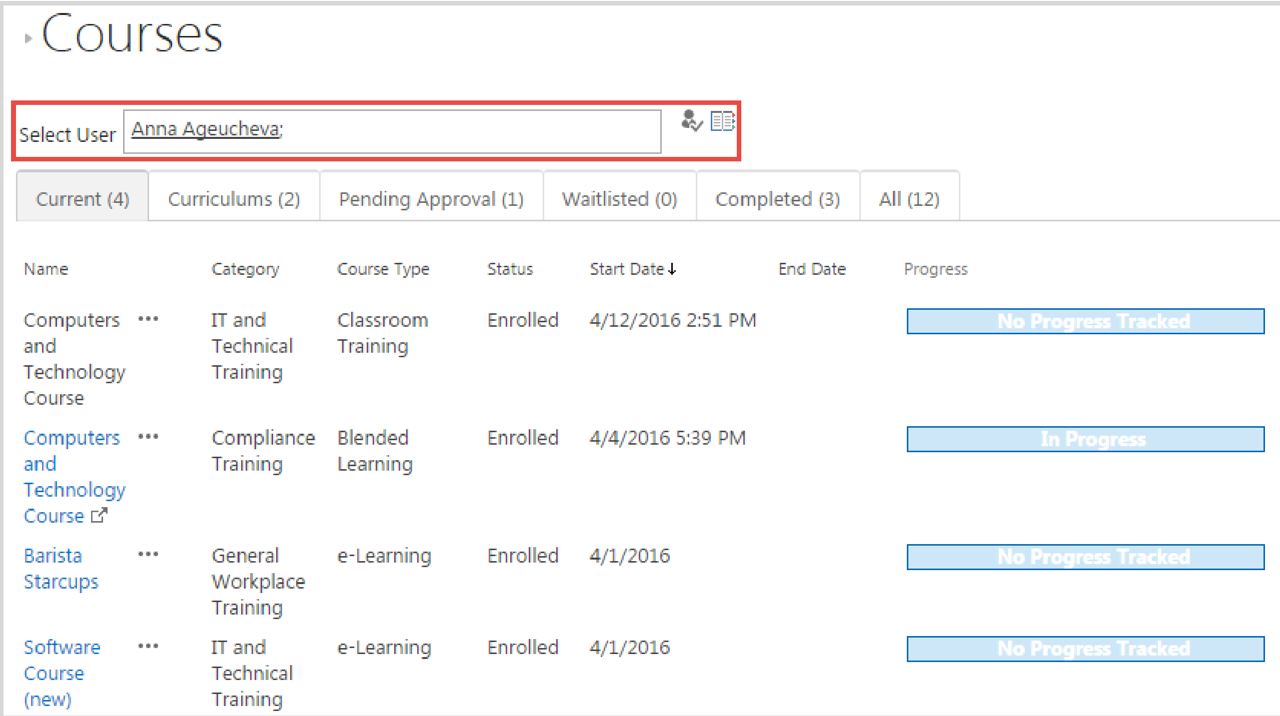
12.1 Manager's Operations

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: 

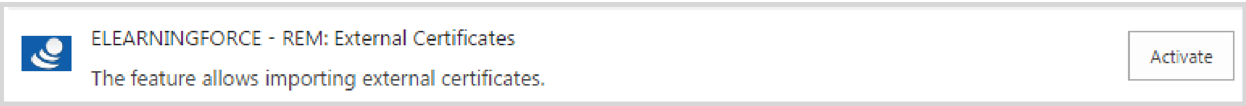
If all his employees have Deactivated CCM profiles, Manager’s section disappears.

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):



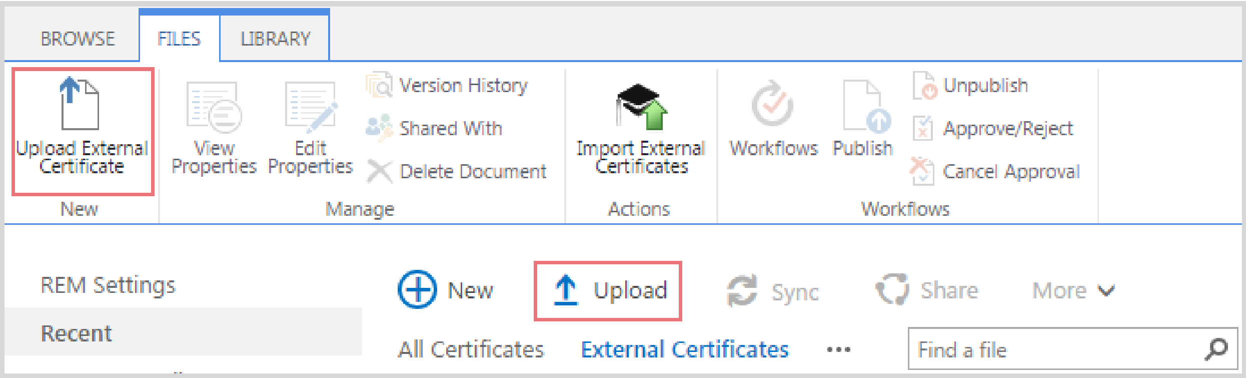
13. IMPORTING EXTERNAL CERTIFICATES

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:

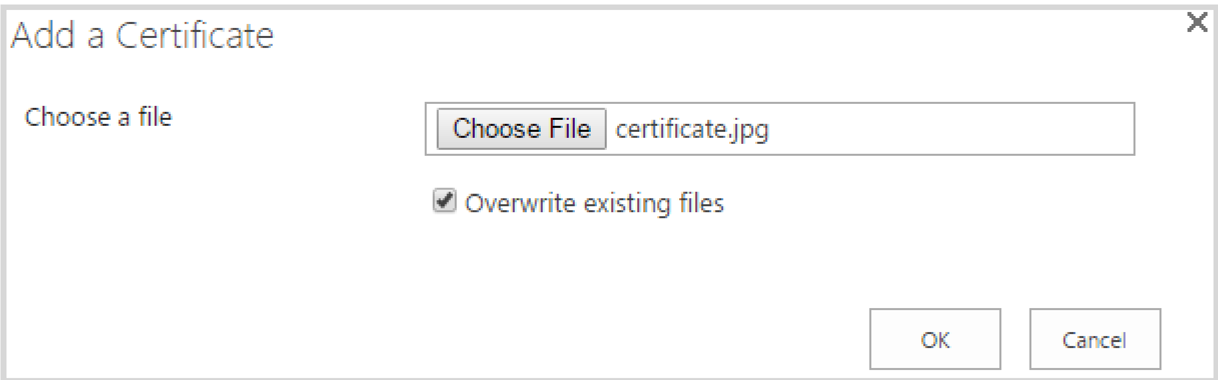


To upload an external certificate, do the following:

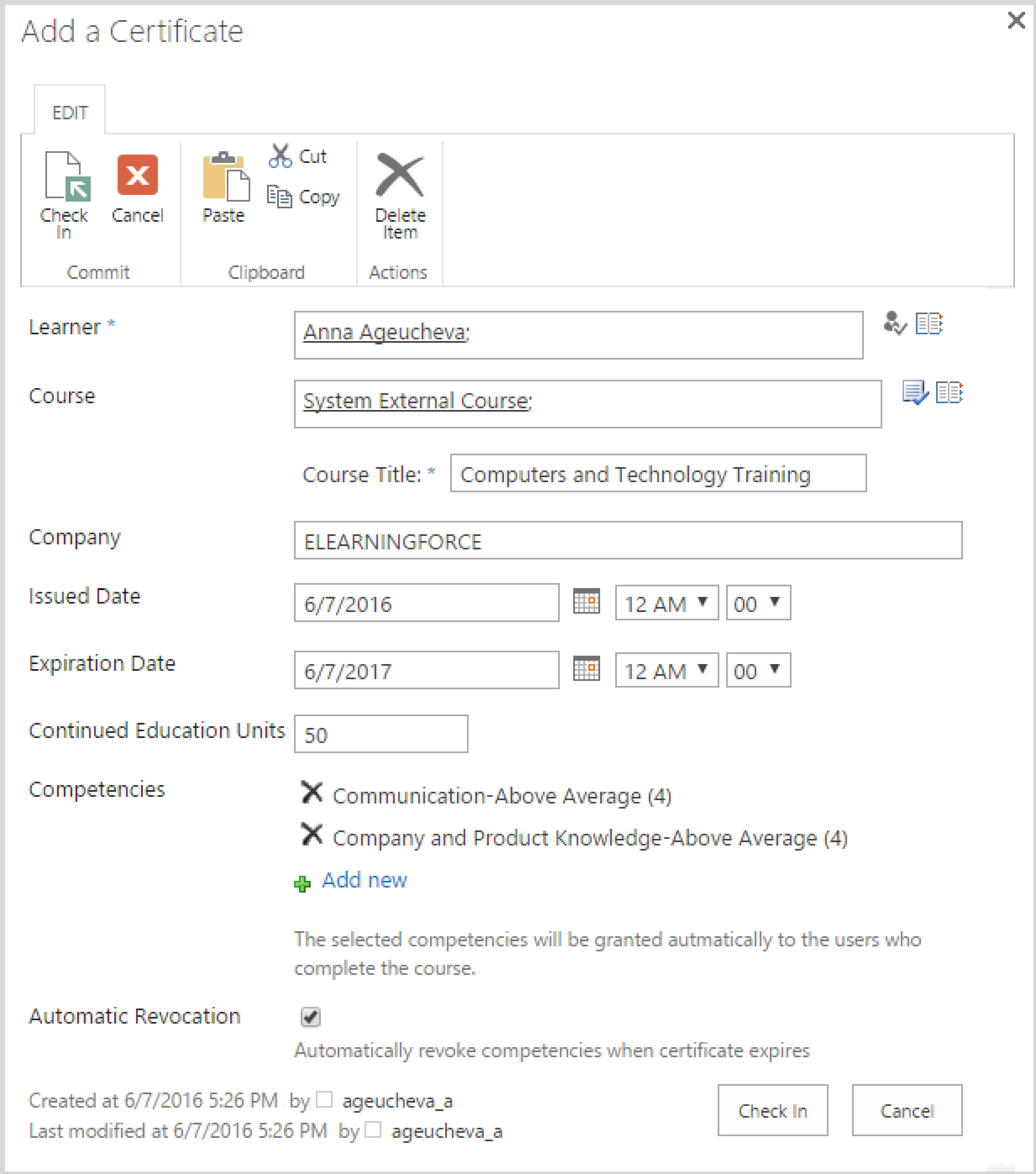
1. Click External Certificates link in REM Settings (or go to Site contents > Certificates (~Lists/REMCertificates)), and then Upload button or Upload External Certificate button on the ribbon:



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



3. Complete the open form:



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.

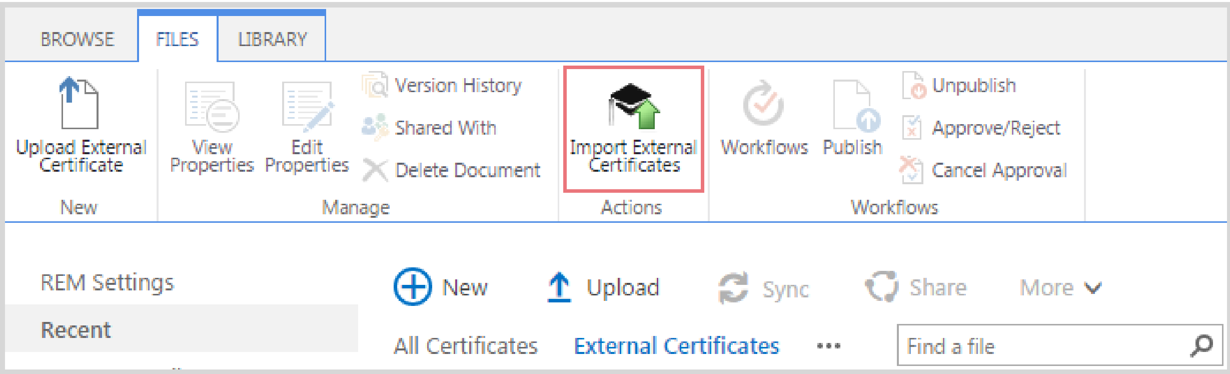
Remember that after you have uploaded an external certificate, you will not able to edit only Certificate Expiration Date field.

Use 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.

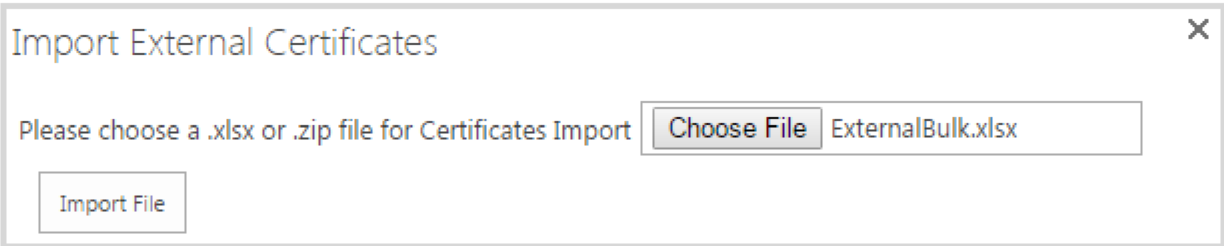
NOTE:	To upload a bigger number of certificates, you can use the PowerShell command. See subchapter 1.10 of [LMS365 On-Premises REM Administration Guide]() for details.

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:



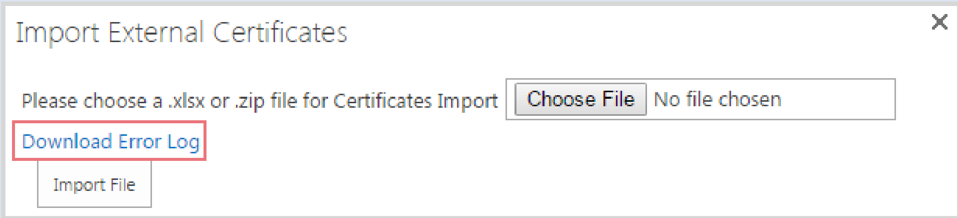
- Fields that must be included in the imported .xlsx file: User Name, Course Name, Issued Date, Company, Expiration Date, Training Points, Competency Levels, Certificate Image or Certificate Template, Automatic Revocation;

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\l8	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);

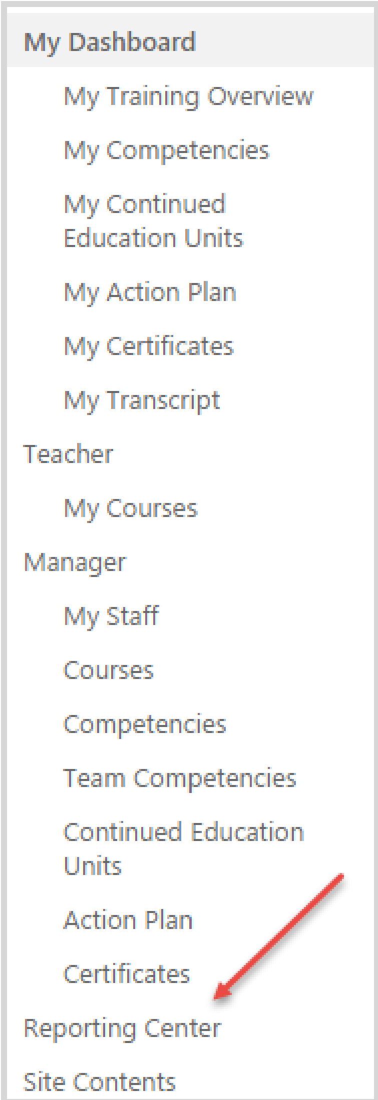
- Certificate image should be included into the archive to import, otherwise indicate a certificate template to use to generate a certificate (if not indicated a default certificate template will be used).

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

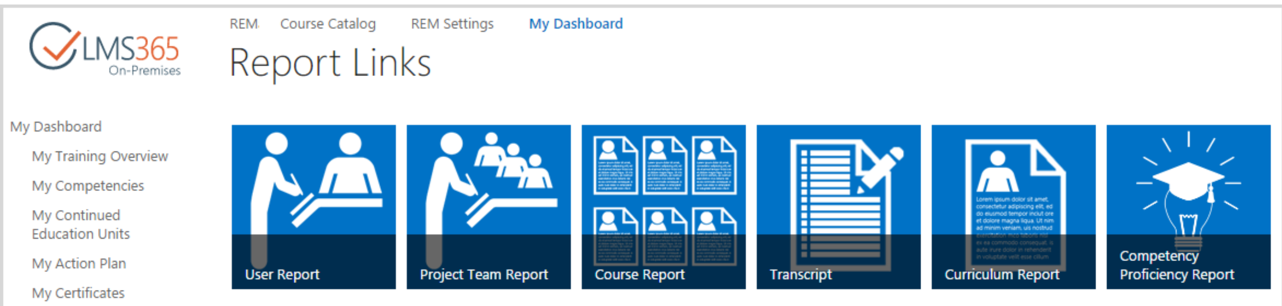
3. After bulk upload, each certificate from the imported file will appear in the list of certificates.

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.

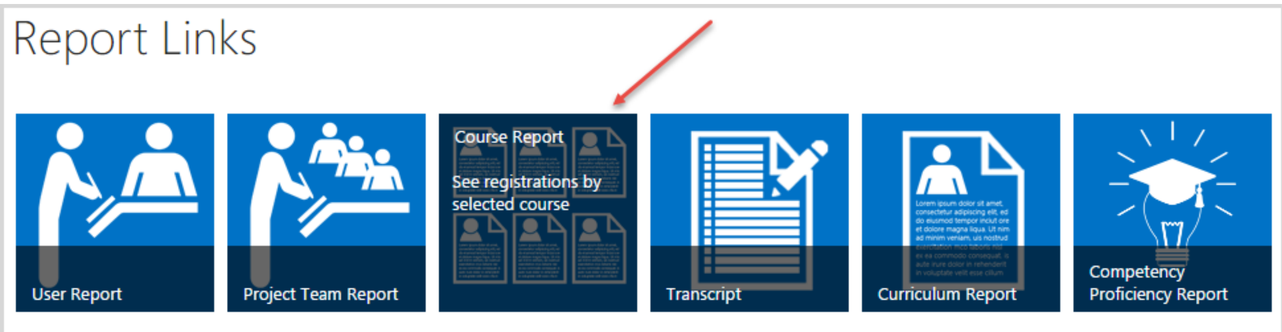
In the table below you can see Roles and Report types that they can correspondingly view:

Role	Report type
Site collection administrator	• 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	• 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)	• 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 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).
Teacher	Sees Reports links after redirecting from DB's Teacher area using Offering Report link: • 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).
Learner	Can see information about himself using direct links in: • User Report; • Curriculum Report; • Transcript; • Competency Proficiency Report.

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

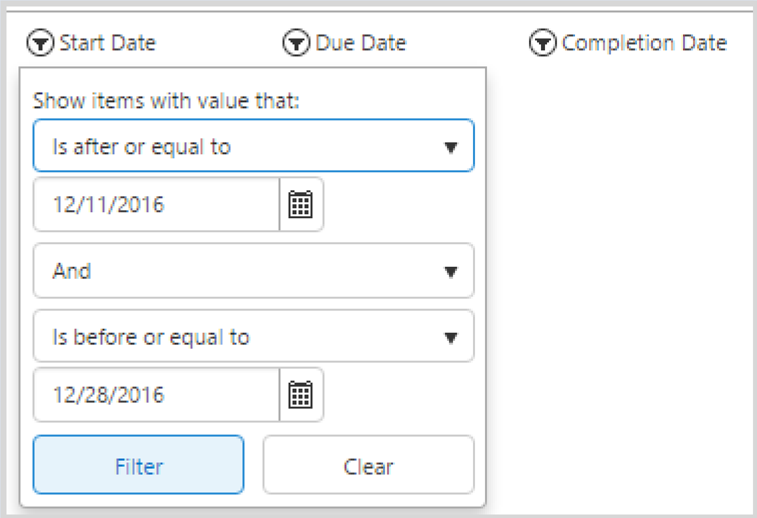
To generate a report, open Report Links page and select the needed report type:



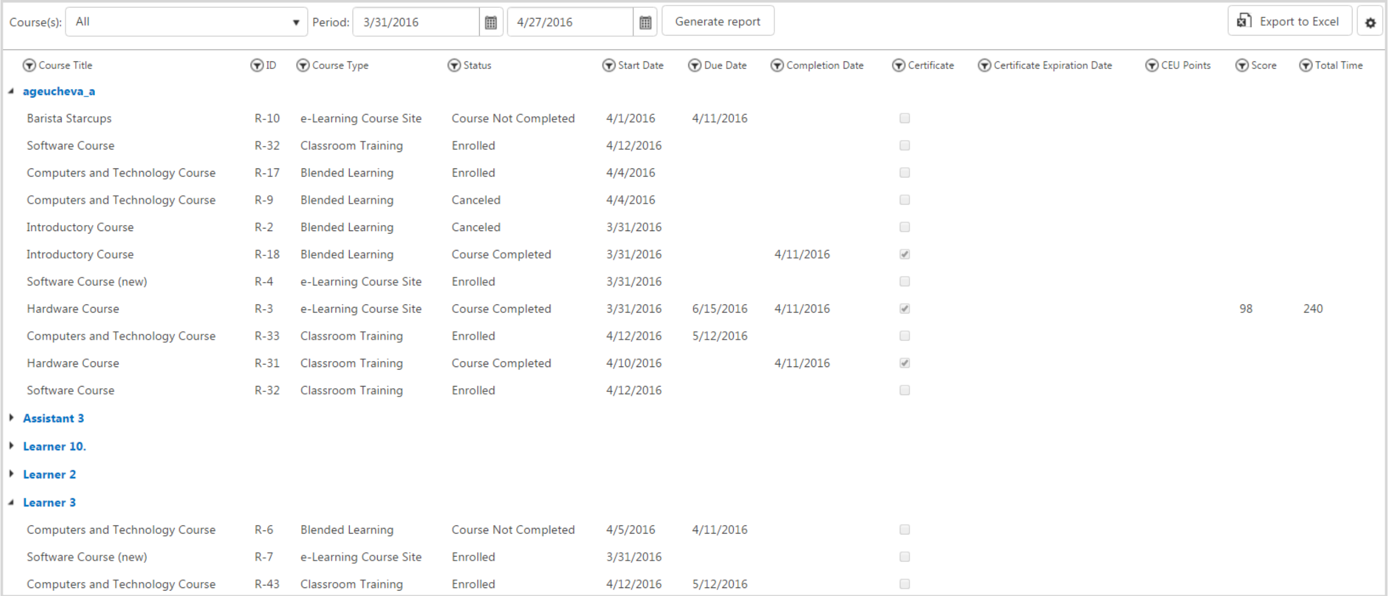
On the opened Reports page, use filters to customize information that will be included in your Report:

- *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:  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		☐				
Software Course	R-32	Classroom Training	Enrolled	4/12/2016			☐				
Computers and Technology Course	R-17	Blended Learning	Enrolled	4/4/2016			☐				
Computers and Technology Course	R-9	Blended Learning	Canceled	4/4/2016			☐				
Introductory Course	R-2	Blended Learning	Canceled	3/31/2016			☐				
Introductory Course	R-18	Blended Learning	Course Completed	3/31/2016		4/11/2016	☑				
Software Course (new)	R-4	e-Learning Course Site	Enrolled	3/31/2016			☐				
Hardware Course	R-3	e-Learning Course Site	Course Completed	3/31/2016	6/15/2016	4/11/2016	☑			98	240
Computers and Technology Course	R-33	Classroom Training	Enrolled	4/12/2016	5/12/2016		☐				
Hardware Course	R-31	Classroom Training	Course Completed	4/10/2016		4/11/2016	☑				
Software Course	R-32	Classroom Training	Enrolled	4/12/2016			☐				
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		☐				
Software Course (new)	R-7	e-Learning Course Site	Enrolled	3/31/2016			☐				
Computers and Technology Course	R-43	Classroom Training	Enrolled	4/12/2016	5/12/2016		☐				

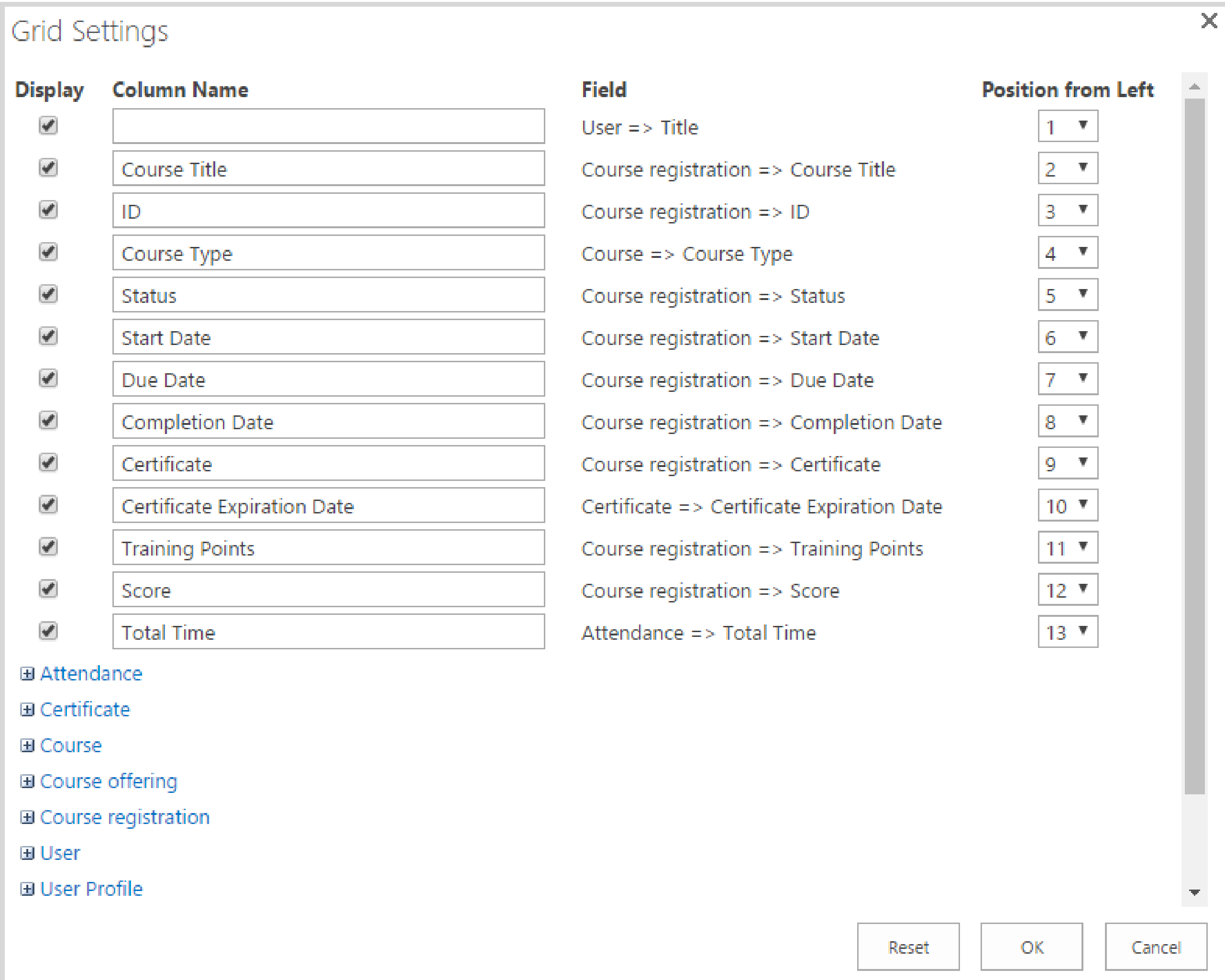
- *Course Title*– shows course name;
- *ID* – shows user registration ID to the course;
- *Course Type* – shows type of the course;
- *Status* – shows status of user registration to the course;
- *Start Date* – shows registration enrollment date;
- *Due Date* – Due Date is displayed depending on Registration 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:



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.