

# Registration & Enrollment Module & Dashboard User Guide

*Version 4.8.4.45*



For Microsoft SharePoint Server

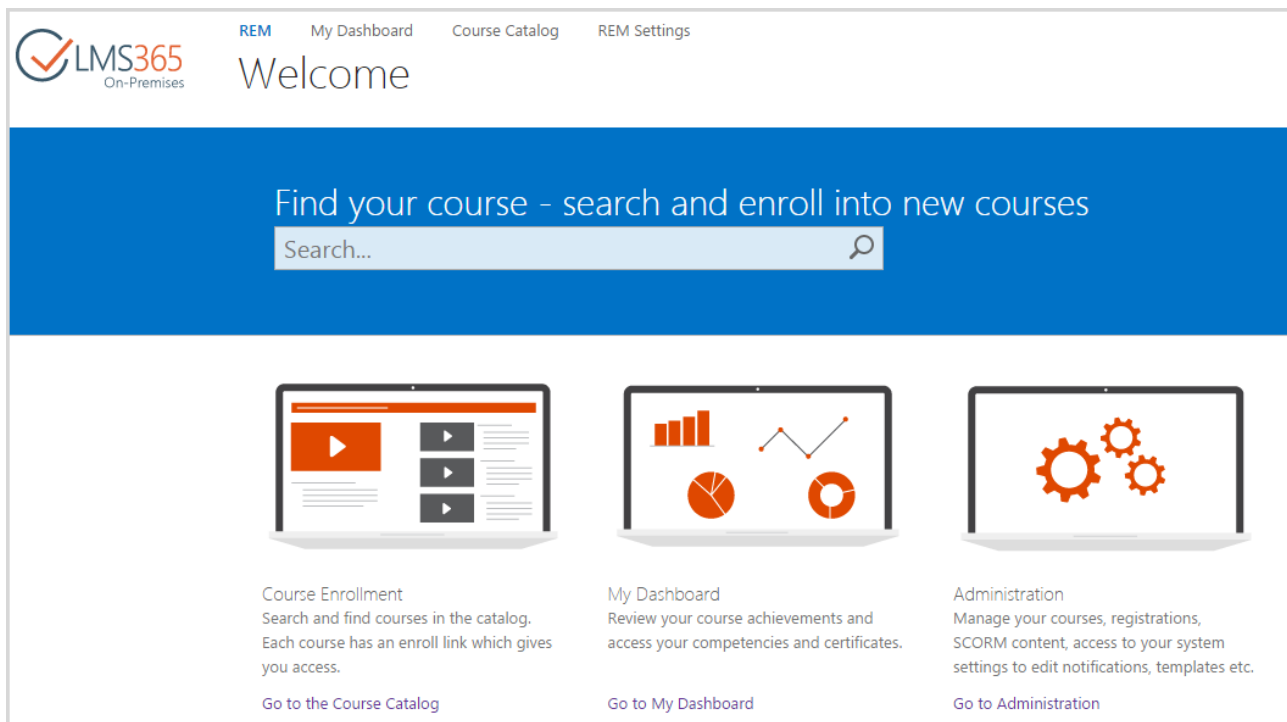
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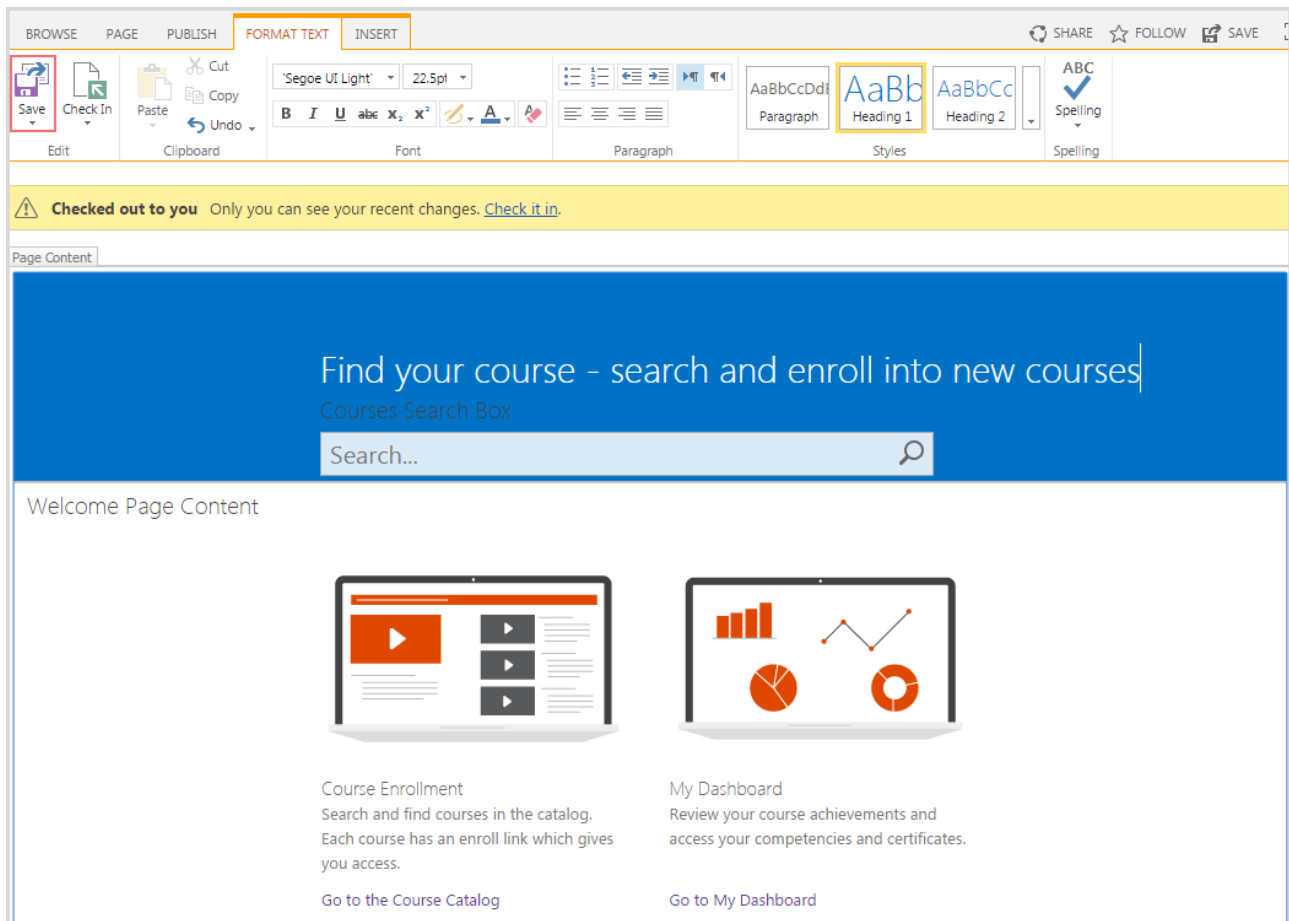
# 1 HOME PAGE MANAGEMENT

The Home Page contains different tools for managing registration and enrollment process. The page is REM home page for all type of users. From the page users can search courses using search field, navigate to the Course Catalog Search page, to My Dashboard and to the REM Settings page (Administration page is displayed for administrator role only) using links or icons:



To edit the Home Page, do the following:

1. Click the Edit button  on the ribbon. The Editing tab will appear on the toolbar. You can make different changes in the main zone that is change text layout; apply styles and formatting to the text;
2. When finished, click Save to exit the Editing mode and save the changes:



Click My Dashboard link to go to the Dashboard home page. Dashboard site is intended to be a reference point for managers and employees in performing their daily tasks with training:



## 1.1 Gamification Web Part

Gamification web part shows a list of top learners ranked by parameter specified in the settings (Completed Learning Activities or Earned Training Points). Top 3 users in the list are marked with special colored badges (golden, silver and bronze). All other users in the list (for example, if 10 users are included in the top list) have black badges. If 2 users have the same value, they are ordered by the date when they got the value:

BROWSE PAGE SHARE FOLLOW

rem My Dashboard Course Catalog Search REM Settings















## Gamification

Recent

REM Settings

Site Contents


Today This Week This Month

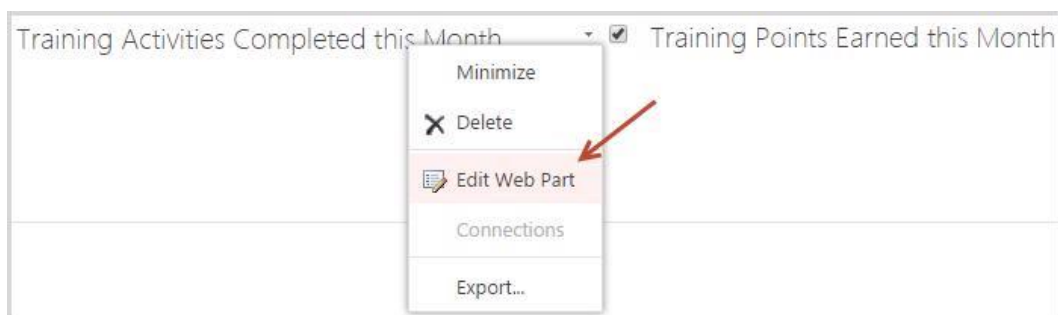
	Name	Name	Completed Training Activities	Department	Jobs
	 Mary Jane Stevens (mjs)	Mary Jane Stevens	6	Accounting Department	Accountant
	 Annie Mac (am)	Annie Mac	5	Accounting Department	Junior Accountant
	 John Smith (js)	John Smith	3	IT Department	Administrator
	 Steve Brown (sb)	Steve Brown	2	IT Department	Administrator
	 Kate Johnson (kj)	Kate Johnson	2	IT Department	Administrator
	 David Adams (da)	David Adams	1	Sales Department	Trainee
	 Evan Thomas (et)	Evan Thomas	1	Sales Department	Trainee

After Gamification functionality is configured (for detailed information on features configuration see 'My Dashboard' section of [LMS365 On-Premises 4.8 Installation and Configuration Guide](#)), a Gamification page with already configured web part is added to page library (path: 'SitePages/Dashboard/Gamification.aspx')

By default, Gamification page contains 3 tabs: 'Today', 'This Week' and 'This Month' which show registrations completed in the corresponding period (in fact each tab is a separate Gamification web part with different settings).

To change settings of the Gamification web part, do the following:

1. Click the Edit button  on the ribbon of the page;
2. Choose the web part you need to edit and click Edit Web Part:



3. Expand category Miscellaneous and change the options according to your needs:

Miscellaneous

Show deactivated users

How many users to show

**User Mode**

▼

**Show the number of**

▼

**Period**

▼

**Show Columns**

- Department
- Profile image
- Jobs
- Badge/Position
- Points
- Name
- Name (login name)

**Select Users**

Select from:

▼

Department:

▼

Job:

▼

Hired Date (hired last X days):

*Show deactivated users* – users with active/incomplete CCM profiles are shown by default in web part; to show users with deactivated profiles check this option

*How many users to show* – type the number of users to be displayed in the list (default value is 10)

*Show the number of* – select the parameter by which learners are ranked in the list:

- Completed Training Activities – learners are ranked by the number of completed registrations to REM Courses (if user has completed the same course 2 or more times all his completions are counted as separate registrations);
- Earned Training Points – learners are ranked by the number of earned training points;
- Earned Training Points (incl. expired certificates) – learners are ranked by the number of earned training points including training points from the expired certificates.

*Period* – select period to display completed registrations for (all 4 modes can be displayed by adding 4 'gamification' web parts on a page with different period):

- Today - it is a period from '**0 hours 0 minutes today**' to '**current**' time.
- This Week - it is a period from '**0 hours 0 minutes of first day of week**' to '**current**' time. The first day of week can be changed in 'Regional Settings'.
- This Month - it is a period from '**0 hours 0 minutes of first day of month**' to '**current**' time.
- Last X Days - it is a period from '**0 hours 0 minutes of current day minus specified days**' to '**current**' time.

*Show Columns* – enable checkboxes next to columns to display information about top learners:

- Department (information is taken from CCM user profile);
- Profile image (information is taken from CCM user profile);
- Job (information is taken from CCM user profile);
- Badge/Position (colored or black badges indication position in the top list);
- Points (information from REM);
- Name (information is taken from CCM user profile);
- Name (login name) (information is taken from CCM user profile).

*Select Users* – this setting allows selecting users for the list from All Users or from Filtered Users. The following filtering options are available:

- Department;
- Job;
- Hired Date (hired last X days).

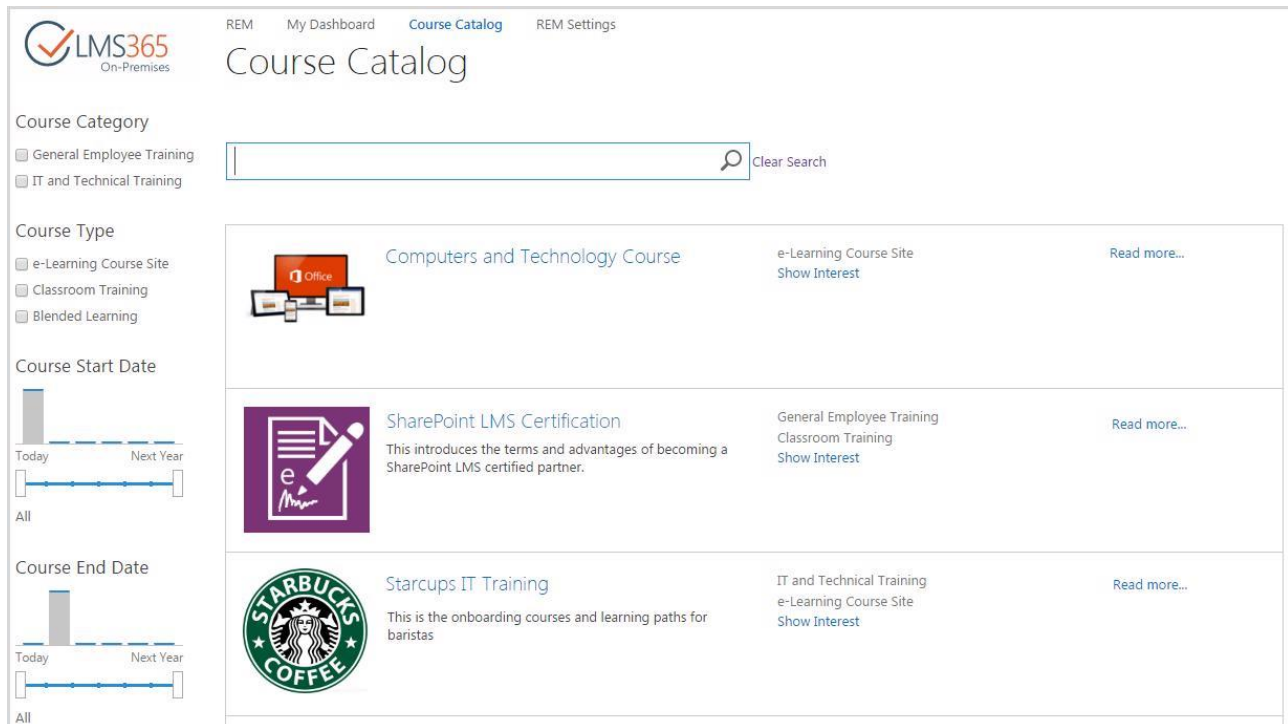
The filter shows in the 'Gamification' web part only users who completely correspond to all conditions.

4. Click Apply button to save the changes or Cancel button to discard them;
5. Click Save button on the ribbon to save the page.



## 2 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 page:



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'. On the left, there are filter sections: 'Course Category' with checkboxes for 'General Employee Training' and 'IT and Technical Training'; 'Course Type' with checkboxes for 'e-Learning Course Site', 'Classroom Training', and 'Blended Learning'; 'Course Start Date' with a bar chart and 'All' option; and 'Course End Date' with a bar chart and 'All' option. The main content area displays three course cards:

- Computers and Technology Course:** Includes an Office logo icon, 'e-Learning Course Site', and a 'Show Interest' link.
- SharePoint LMS Certification:** Includes a document icon, 'General Employee Training Classroom Training', and a 'Show Interest' link.
- Starbucks IT Training:** Includes the Starbucks logo, 'IT and Technical Training e-Learning Course Site', and a 'Show Interest' link.

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

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

By default, the page also contains the following filters to narrow down the search:

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

### Course Category

- Compliance Training
- General Workplace Training
- Accounting
- Sales and Marketing
- General Employee Training
- General Employee Training

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

### Course Type

- e-Learning
- Material
- Classroom Training

**NOTE:** Common 'e-Learning' course type stands here both for e-Learning course sites and e-Learning content packages.

3. Course Access Period filter – allows applying filter by Course Start and End Dates:

### Course Start Date

Today                      Next Year

All

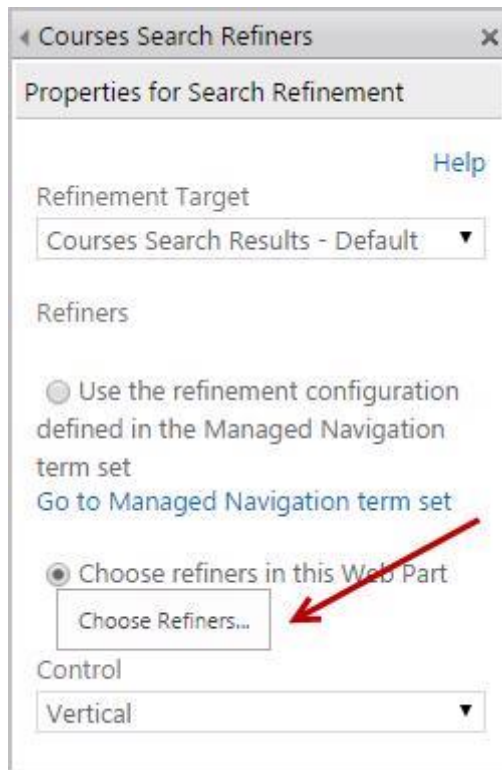
  

### Course End Date

Today                      Next Year

All

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



Choose additional Refiners to be added to filters:

### Refinement configuration for 'Courses Search Refiners'

The refiners will be displayed in the order listed.

**Available refiners**

- ManagedProperties
- MediaDuration
- owsmetadatafacetinfo
- owstaxIdManagedMetadataCourseL
- owstaxidmetadataalltagsinfo
- owstaxIdProductCatalogItemCatego
- owstaxIdREMCManagedMetadataC
- People
- PeopleInMedia
- PeopleKeywords

Add >

< Remove

Move up

Move down

**Selected refiners**

- owstaxIdREMCManagedM
- owstaxIdREMCManagedM
- owstaxIdManagedMetada
- REMAccessStartDate
- REMAccessEndDate

**Configuration for: owstaxidmetadataalltagsinfo (Tags)**

<b>Sample values</b>	<ul style="list-style-type: none"> <li><i>e-Learning Course Site</i> (6)</li> <li><i>Compliance Training</i> (3)</li> <li><i>Classroom Training</i> (2)</li> <li><i>Panorama View (30)</i> (1)</li> <li><i>Bel-Air, Beverly Hills, CA</i> (1)</li> <li><i>General Workplace Training</i> (1)</li> </ul>	<a href="#" style="color: #0070c0; text-decoration: none;">Show more values</a>
<b>Type</b>	Text	
<b>Aliases</b>		
<b>Configuration</b>	Use the Add button to configure the property	

Preview refiners...    OK    Cancel

The selected refiners will appear on the courses search page:

**Tags**

- e-Learning Course Site
- Compliance Training
- Classroom Training
- Panorama View (30)
- Bel-Air, Beverly Hills, CA
- SHOW MORE

## 3 USER ROLES AND PERMISSIONS

### 3.1 REM User Roles

The REM security model is based on Microsoft Office SharePoint Server security but is simplified in terms of items, lists and libraries permission management.

By default, the REM security model includes User Roles on the following levels:

**Visitors** – such users have same permissions as anonymous users, they could only enroll in course offerings; once a visitor enrolls he is added to Learners group. By default, everyone is added to this group;

**Learners** – such users have read permissions to site and are able to enroll into course offerings;

**Teachers** – such users can enroll users into their courses and manage registrations via dashboard Teacher area;

**Line Managers** – such users can approve/reject enrollment requests from their staff. Line Manager is a user specified in 'Manager' property of user's CCM profile;

**LMS Administrators** – such users have contribute permissions to site; they can access to all REM Settings functionalities; Add and Customize Pages, manage Courses, Course Offerings and Registrations from the Courses list, enroll users, manage REM e-mails and various text and enrollment templates, operate the Reporting feature;

**NOTE:** We recommend adding an AD group to the REM LMS Administrators group and also adding the same AD group to the LMS Technical Administrators. This will allow the LMS Administrators to help with the administration of any LMS course sites without being registered as a teacher in REM and/or LMS site.

**Local Administrators** – such users have contribute permissions to site, they cannot grant permissions and access site settings.

**NOTE:** Any design changes to the catalog, pages, web parts should be done by skilled SharePoint people that should be added to the Designers SharePoint Group and also LMS Administrators if they also need to do manage the application lists inside the catalog. Only SharePoint administrators and/or trained SharePoint personnel should be granted the Site Collection Administrators permissions and ELEARNINGFORCE recommend only granting the minimum required permissions to people without proper SharePoint training.

To specify the permission settings, go to **Settings > Site Settings > Site Permissions** (to do it, a user should have Global Administrator rights):

## SharePoint\_REM ▸ People and Groups ⓘ

New ▾ Settings ▾

Group	Edit	About me	Work email
Designers		Members of this group can edit lists, document libraries, and pages in the site. Designers can create Master Pages and Page Layouts in the Master Page Gallery and can change the behavior and appearance of each site in the site collection by using master pages and CSS files.	
Employees		Use this group to grant people read permissions to the SharePoint site: <a href="#">My Dashboard</a>	
Everyone			
Learners		Group contains learners who are enrolled in a course.	
Line Managers		Members of this group can approve enrollment requests.	
LMS Administrators		Contains LMS Administrators.	
Local Administrators		Local administrators.	
Managers		Use this group to grant people full control permissions to the SharePoint site: <a href="#">My Dashboard</a>	
My Dashboard Members		Use this group to grant people contribute permissions to the SharePoint site: <a href="#">My Dashboard</a>	
Restricted Readers		Members of this group can view pages and documents, but cannot view historical versions or review user rights information.	
SharePoint_REM Members		Use this group to grant people contribute permissions to the SharePoint site: <a href="#">SharePoint_REM</a>	
SharePoint_REM Owners		Use this group to grant people full control permissions to the SharePoint site: <a href="#">SharePoint_REM</a>	
SharePoint_REM Visitors		Use this group to grant people read permissions to the SharePoint site: <a href="#">SharePoint_REM</a>	
Staff Managers		Staff managers.	
Teachers		Group contains all teachers from the synchronized course.	
Visitors		Default REM group containing users, who can view information about courses.	

- *Grant Permissions* – click the button to open the editing form: select the needed user and specify the list of permissions that will be granted. You can optionally send a welcome e-mail notifying on gaining new permissions;
- *Create Group* – click the button to open the editing form: you will be offered to create a new SharePoint user group;
- *Edit User Permissions* – check the box against the needed user/user group and click the button to open the editing form: check the box against the needed permission levels;
- *Remove User Permissions* – check the box against the needed user/user group and click the button to delete their permission levels;
- *Check Permissions* – click the button to open the search form: specify the name of the needed user and click Check Permissions. The system will show the permission information;
- *Anonymous Access* – click the button to open the edit form: specify the access area.

Default user permissions in the REM are shown in the table below:

Role Actions	Site Collection Administrator	Local Administrator	LMS Administrator	Line Manager	Teacher	Learner	Visitor
Access to Site Settings	Full Control	No access	Full Control	No access	No access	No access	No access
Permissions Management	Full Control	No access	No access	No access	No access	No access	No access
Curriculums Management	Full Control	No access	Full Control	No access	No access	No access	No access
Courses Management	Full Control	No access	Full Control	View	No access	No access	No access
Course Offerings Management	Full Control	No access	Full Control	View	No access	No access	No access
Users Tools Management	Full Control	No access	Full Control	No access	No access	No access	No access
Registrations Management	Full Control	No access	Full Control	No access	No access	No access	No access
Enrollment Templates Management	Full Control	No access	Full Control	No access	No access	No access	No access
Generate Name Cards Management	Full Control	No access	Full Control	No access	No access	No access	No access
Invoice Templates Management	Full Control	No access	Full Control	No access	No access	No access	No access
Text Templates Management	Full Control	No access	Full Control	No access	No access	No access	No access
Email Templates Management	Full Control	No access	Full Control	No access	No access	No access	No access
Course Interests Management	Full Control	No access	Full Control	Yes	No access	No access	No access
Coupons Management	Full Control	No access	Full Control	No access	No access	No access	No access

<b>Rooms Management</b>	Full Control	No access	Full Control	No access	No access	No access	No access
<b>Locations Management</b>	Full Control	No access	Full Control	No access	No access	No access	No access
<b>Categories Management</b>	Full Control	No access	Full Control	No access	No access	No access	No access
<b>Credits For Payment Management</b>	Full Control	No access	Full Control	No access	No access	No access	No access
<b>Reports Management</b>	Full Control	No access	Full Control	View	No access	No access	No access
<b>Enrollment Requests Management</b>	Full Control	No access	Full Control	View, Edit requests from own subordinates	No access	No access	No access
<b>Enrollment Request Tasks Management</b>	Full Control	No access	Full Control	View, Edit requests from own subordinates	No access	No access	No access
<b>Timetable Templates Management</b>	Full Control	No access	Full Control	View	No access	No access	No access
<b>Deleted Course Offerings Management</b>	Full Control	No access	Full Control	View	No access	No access	No access
<b>Deleted Registrations Management</b>	Full Control	No access	Full Control	View	No access	No access	No access
<b>Report Templates Management</b>	Full Control	No access	Full Control	View	No access	No access	No access
<b>User History Management</b>	Full Control	No access	Full Control	View	No access	No access	No access
<b>Course Catalog Search Page</b>	Full Control	View	View, Edit	View	View	View	View
<b>Access to Details Pages: Course Details Page</b>	Full Access	Limited Access	Limited Access	Limited Access	Limited Access	Limited Access	Limited Access
	Full Control	View	View, Edit	View	View	View	View



<b>Course Offering Details Page</b>	Full Control	View only if enrolled to course	View, Edit	View only if enrolled to course	View to own courses	View only if enrolled to course	No access
<b>Registration Details Page</b>	Full Control	View only if enrolled to course	View, Edit	View only if enrolled to course	View to own courses	View only if enrolled to course	No access

## 3.2 Dashboard User Roles

<b>NOTE:</b>	<p>By default the following users have permissions to view dashboard pages,</p> <ol style="list-style-type: none"> <li>1. <b>'Everyone'</b> is added to <b>Employees</b> group;</li> <li>2. <b>Managers</b> are those people who are added to 'Employees' group &amp; are either: <ul style="list-style-type: none"> <li>• managers on CCM host site;</li> <li>• site admin of dashboard site;</li> <li>• members of 'Managers' group from dashboard settings ('Line Managers' group by default).</li> </ul> </li> <li>3. <b>Teachers</b> are people who are set as teachers in course offerings of REM host site.</li> </ol>
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The following are the main Dashboard User roles:

1. Manager;
2. Teacher;
3. Employee.

**Manager** is a user who is a member of Managers group in the site permissions. Manager can perform the following operations for dashboard configuration:

- Define where Dashboard should take profile settings (from CCM or from SharePoint);
- Enable/disable "Show Tree of Staff" option;
- Enable/disable an ability to search profiles among All Users;
- Choose how links from the "Links" section should be opened (in a new window or in the same);
- Set custom Relations between employees;
- Add custom company's URLs (Site Settings -> Quick Launch);
- Set what menu items and menu section titles are shown for Manager, Teacher or\and Employee;
- Edit menu items and menu section titles, i.e. set custom Title, URL;
- Add or remove indents to any menu item;
- Modify Dashboard homepage.

Manager can perform the following activities for user management:

*My Dashboard* section:

- View My Dashboard (Homepage);
- View My Training Overview;
- View My Competencies;
- View My Training Points;
- View My Action Plan;
- View My Certificates;
- View My E-portfolio;
- View My Transcript.

*Manager* section:

- My Staff;
- Courses;
- Competencies;
- Staff Competencies;
- Training Points;
- Action Plan;
- Certificates;
- Attendance;
- Score;
- Assignments;
- Announcements.

*Links* section (if enabled in Navigation):

- LMS Organization;
- Competencies and Certifications (host site);
- Course Catalog (from REM).

**Teacher** is a user who is a member of Teachers group in the site permissions. Teacher performs the following activities:

*My Dashboard* section:

- View My Dashboard (Homepage);
- View My Training Overview;
- View My Competencies;
- View My Training Points;
- View My Action Plan;
- View My Certificates;
- View My E-portfolio;
- View My Transcript.

*Teacher* section:

- View and modify My Courses.

*Links* section (if enabled in Navigation):

- LMS Organization;
- Competencies and Certifications (host site);
- Course Catalog (from REM).

**Employee** is a user who is a member of Employees group in the site permissions. Employee performs the following activities:

*My Dashboard* section:

- View My Dashboard (Homepage);
- View My Training Overview;
- View My Competencies;
- View My Training Points;
- View My Action Plan;
- View My Certificates;
- View My E-portfolio;
- View My Transcript.

*Links* section (if enabled in Navigation):

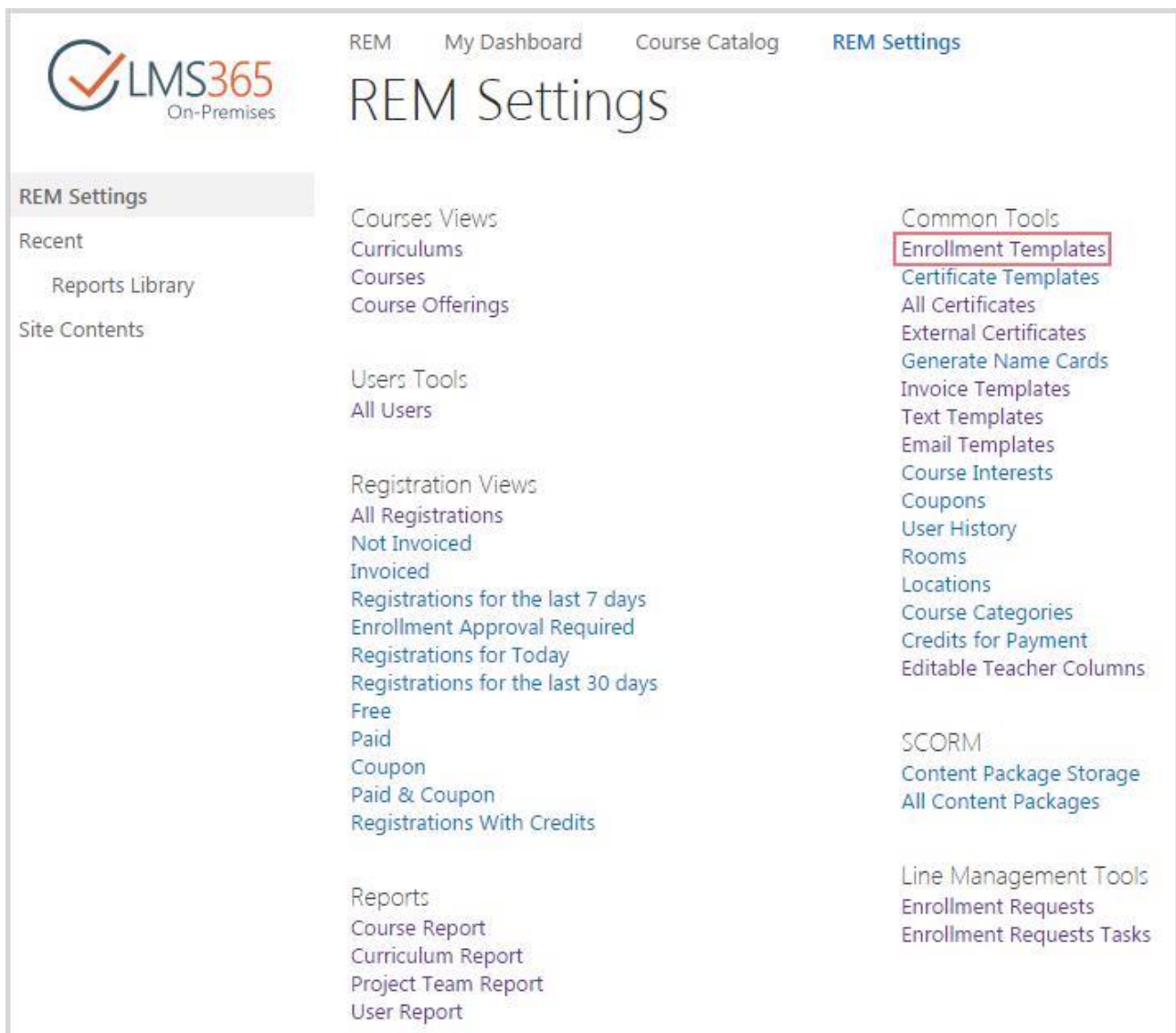
- LMS Organization;
- Competencies and Certifications (host site);
- Course Catalog (from REM).

## 4 REM OPERATIONS

### 4.1 LMS Administrator Operations

#### 4.1.1 Enrollment Template Management


Enrollment Templates tool represents the document library and contains Enrollment Template Web Part pages. You can create, edit or delete registration and enrollment form here:



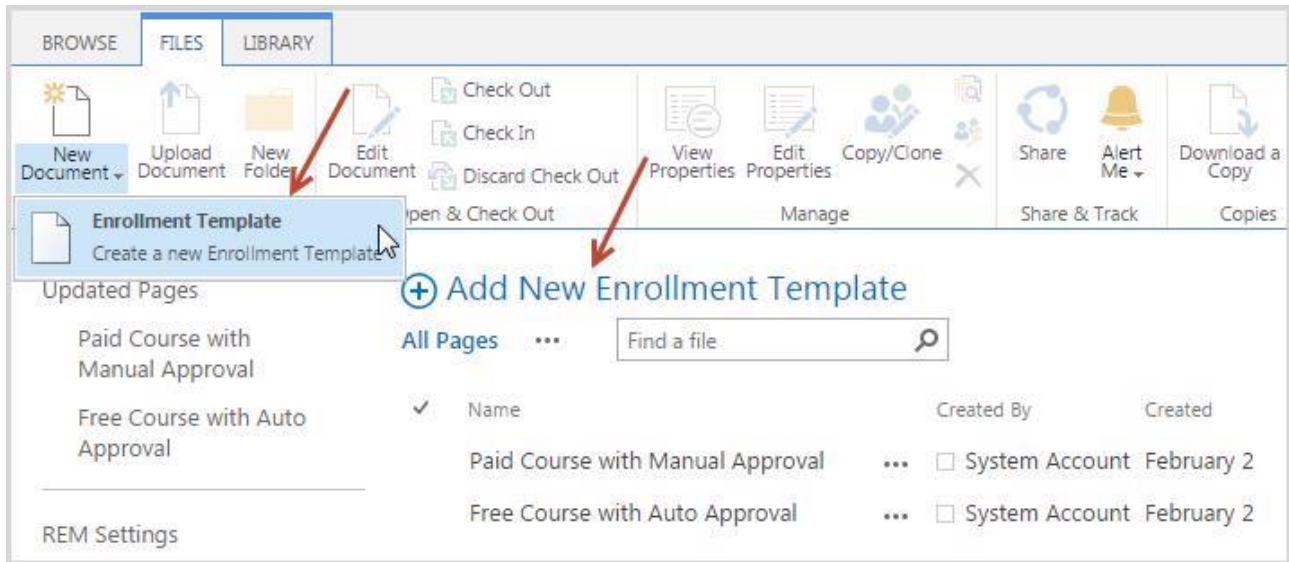
You must have at least one template to be able to create courses.

### 4.1.1.1 Creating Enrollment Template

To create an Enrollment template, do the following:

1. Go to Enrollment Templates section;
2. On the ribbon menu go to Files > New Document > Enrollment Template or click Add New Enrollment Template button :

Enrollment Template button :



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

Name *	<input type="text"/>
Language	English (United States) ▼
Payment Type *	Free ▼
Approval Type	Manual ▼
People who can automatically enroll users	<input type="text"/> Enter users and groups separated with semicolons.
Max Number of Attachments	1
Max Size of one Attachment	100 Size in KB
Show Add Multiple Users Button For Learners/Visitors	<input type="checkbox"/>
Show Add Multiple Users Button For Anonymous users	<input type="checkbox"/> Allow anonymous users add users in AD and FBA sources <input type="checkbox"/> Show Add Multiple Users button for anonymous
Activate Waiting List	<input type="checkbox"/>
Automatic Enrollment from the Waiting List	<input type="checkbox"/> Automatically enroll the next user from the waiting list when a place becomes available in the course.
Send email to Learner after Registration	<input type="checkbox"/>
Send email to Admin after Registration	<input type="checkbox"/>
Send Start Reminder	<input type="checkbox"/>
Comma Separated List of Days Prior to Course Offering Start Date	5 Reminder will be sent to the specified number of days prior to the course starting. Default is 5 days.

Comma Separated List of Days Prior to Course Offering Start Date	<input type="text" value="5"/>	Reminder will be sent to the specified number of days prior to the course starting. Default is 5 days.
Send Due Date Reminder	<input type="checkbox"/>	
Comma Separated List of Days Prior to Actual Due Date	<input type="text" value="5"/>	Reminder will be sent to the specified number of days prior to the due date. Default is 5 days.
Days Prior to Course Offering Start Date (for low users count notification)	<input type="text"/>	A notification is created X days prior to course start date if the minimum number of attendees has not been reached.
Send Approval Reminder	<input type="checkbox"/>	
Approval Time Out	<input type="text" value="5"/>	Days prior to the course starting to send a reminder e-mail to the approver(s) if no approval has been received. Default is 5 days.
Set Registration Status to 'Course Not Completed' When Offering is Closed	<input checked="" type="checkbox"/>	
Send overdue email reminder to	<input type="checkbox"/> Learner <input type="text"/> <input type="checkbox"/> Manager <input type="text"/> <input type="checkbox"/> Manager's manager <input type="text"/>	Reminder will be sent to the specified number of days after the due date.
Number of days the learner stays in the learner group after the course was completed	<input type="text" value="7"/>	Actual only for Course Completed registrations.
Allow Cancel Registration	<input checked="" type="checkbox"/>	
Days Prior to Course Offering Start Date	<input type="text"/>	Registration can be canceled no later than X days before course will be started.
Cancellation Reason Required	<input checked="" type="checkbox"/>	

Email Templates Configuration	Email Type	Email Template	Enabled
	Learner Course Enrollment Confirmation	Default	<input checked="" type="checkbox"/>
	Course Enrollment Confirmation	Default	<input checked="" type="checkbox"/>
	Line Manager Approval Confirmation	Default	<input checked="" type="checkbox"/>
	Course Start Reminder Notification	Default	<input checked="" type="checkbox"/>
	Course Available Confirmation	Default	<input checked="" type="checkbox"/>
	Course Offering Canceled Notification	Default	<input checked="" type="checkbox"/>
	Waiting List Confirmation	Default	<input checked="" type="checkbox"/>
	Course Offering below Minimum required Attendees	Default	<input checked="" type="checkbox"/>
	Course Registration has been deleted Confirmation	Default	<input checked="" type="checkbox"/>
	Learner Canceled Notification	Default	<input checked="" type="checkbox"/>
	Approval Reminder	Default	<input checked="" type="checkbox"/>
	Course Registration Approval Request	Default	<input checked="" type="checkbox"/>
	Course Completed Confirmation	Default	<input checked="" type="checkbox"/>
	Course Not Completed Confirmation	Default	<input checked="" type="checkbox"/>
	Certificate Has Expired	Default	<input checked="" type="checkbox"/>
	Certificate Is Expiring Reminder	Default	<input checked="" type="checkbox"/>
	Course Offering Ended Notification	Default	<input checked="" type="checkbox"/>
	Course Offering Closed Notification	Default	<input checked="" type="checkbox"/>
	Course Completion Due Date Reminder Notification	Default	<input checked="" type="checkbox"/>
	Course Update Notification	Default	<input checked="" type="checkbox"/>
	Course Offering Teacher Assigned	Default	<input checked="" type="checkbox"/>
	Course Registration Overdue Reminder	Default	<input checked="" type="checkbox"/>

Default for course types	<input type="checkbox"/> e-Learning Course Site <input type="checkbox"/> Blended Learning <input type="checkbox"/> Classroom Training <input type="checkbox"/> Webinar Course <input type="checkbox"/> e-Learning Content Package <input type="checkbox"/> Material
Attach ICS File To	<input type="checkbox"/> e-Learning Course Site <input checked="" type="checkbox"/> Blended Learning <input checked="" type="checkbox"/> Classroom Training <input checked="" type="checkbox"/> Webinar Course <input type="checkbox"/> e-Learning Content Package <input type="checkbox"/> Material
Close Offering When Access Period Expired For	<input checked="" type="checkbox"/> e-Learning Course Site <input type="checkbox"/> Blended Learning <input type="checkbox"/> Classroom Training <input type="checkbox"/> Webinar Course <input checked="" type="checkbox"/> e-Learning Content Package <input checked="" type="checkbox"/> Material

- *Name* – type the unique name for a new enrollment template;
  - *Language* – select the language for this template from the drop-down list. The set of available languages depends on the number of resource files with the name "*EnrollmentTemplate.<lang-lang>.resx*";
  - *Payment Type* – from the drop-down list, select the type of payment that learners have to make to enroll in the course (*Free/Coupon/Paid*).
- If 'Coupon' or 'Paid' option is selected, fill in the fields below:

Payment Type *	Paid ▼
Price for Members	35
Price For Non Member	50
Price for Other	50
Invoice Template	Default ▼
Currency Code	USD (US dollar) ▼
VAT	0

- *Price for Members*;
- *Price for Non Member*;
- *Price for Other*;
- *Invoice Template* – select the invoice template from the list of created Invoice Templates (see the [Invoice Template Management](#) section). This template will be used for invoicing learners if your course requires payment. This field is required if you have chosen *Paid* payment type;
- *Currency Code* – select currency for the prices specified above (USD, DKR, EUR, and so on);
- *VAT* – if you use the coupon for your course, specify the amount for it (in %).

**NOTE:** When 'Free' option is selected, all fields related to price and currency are hidden.

- *Approval Type* – from the drop-down list, select the approval type:
  - *Automatic* (approval is done by the system after Enrollment Confirmation);
  - *Manual* (should be approved by LMS Administrator);
  - *Manual+Line Manager* (enrollment request should be approved or rejected by the Line Manager before it's approved by LMS Administrator);

**NOTE:** If user is enrolled by LMS Administrator, the registration will automatically be created with the 'Enrolled' status for Manual approval type. For Manual+Line Manager approval type in the same case, registration with the 'Enrolled' status will be created after Line Manager has approved enrollment request.

- *Automatic+Line Manager* (enrollment request should be approved or rejected by the Line Manager before the system approves it);
- *Custom* (the system allows to select published custom workflows created on this site, to find out how to create such workflows see [LMS365 On-Premises REM Administration Guide](#)).

**NOTE:** After enrolling Learners into courses with Line Manager approval type a message about enrollment approval request is displayed:



Confirmation of Enrollment
✕

---

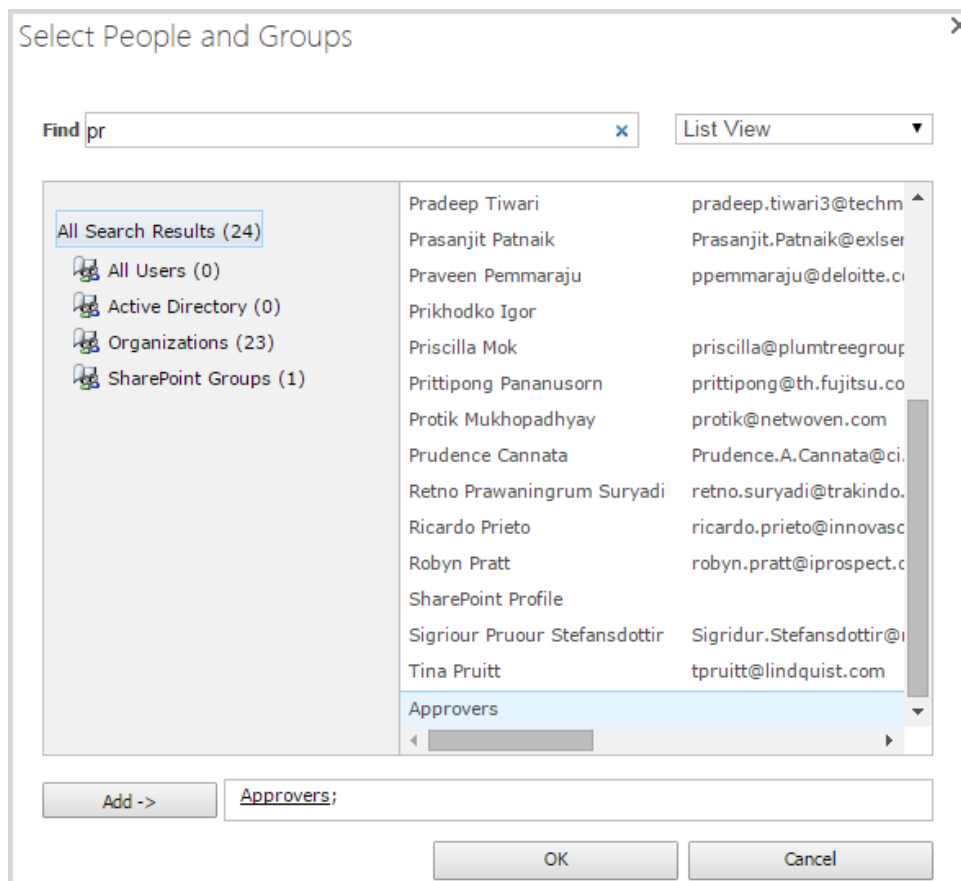
## Approval is required!

The enrollment request for the Classroom Training course: 'Barista Training' has been received and is currently waiting for management approval. Further instructions will be sent to your e-mail address.

← Course Catalog
 

 My Dashboard →

- *People who can automatically enroll users* – select users, AD Groups or SharePoint Groups who can automatically enroll users:



The screenshot shows a 'Select People and Groups' dialog box. It features a search bar with 'Find pr' and a 'List View' dropdown. On the left, there are search results categorized by type: All Search Results (24), All Users (0), Active Directory (0), Organizations (23), and SharePoint Groups (1). The main area displays a list of users with their names and email addresses. At the bottom, there is an 'Add ->' button, a text field labeled 'Approvers;' containing the text 'pr', and 'OK' and 'Cancel' buttons.

Name	Email
Pradeep Tiwari	pradeep.tiwari3@techm
Prasanjit Patnaik	Prasanjit.Patnaik@exlser
Praveen Pemmaraju	ppemmaraju@deloitte.co
Prikhodko Igor	
Priscilla Mok	priscilla@plumtreegroup
Prittpong Pananusorn	prittpong@th.fujitsu.co
Protik Mukhopadhyay	protik@netwoven.com
Prudence Cannata	Prudence.A.Cannata@ci
Retno Prawaningrum Suryadi	retno.suryadi@trakindo.
Ricardo Prieto	ricardo.prieto@innovasc
Robyn Pratt	robyn.pratt@iprospect.c
SharePoint Profile	
Sigriour Pruour Stefansdottir	Sigridur.Stefansdottir@i
Tina Pruitt	tpruitt@lindquist.com

When option is enabled any enrollment approval type will be overruled. This means when people specified in this field enroll other users, registrations will be automatically created with status 'Enrolled';

- *Max Number Of Attachments* – specify how many attachments user can add to the enrollment form. In the field below, specify the size of one of the attachments. Any user, enrolled in the Course, can attach files. To add attachments, users should [edit created enrollment template](#) (go to edit mode and insert the Attachments web part from Enrollment Web Parts category). When user adds a web part to the enrollment template, the learners will be able to add attachments to this template. Note, please, that the attachment quantity and size depends on template parameters;
- *Max Size of one Attachment* – specify the size of one attachment in KB;
- *Show Add Multiple Users Button* – select the checkbox to allow authorized users to add more than 1 user at the same time + this checkbox enables the field below;
- *Show Add Multiple Users Button For Anonymous users*– select the checkbox to allow anonymous users to add more than 1 user at the same time;

<b>NOTE:</b>	<p>If “Allow anonymous users add users in AD and FBA sources” option is checked, anonymous users can enroll into courses. In this case they specify new user credentials in the enrollment form, and if:</p> <ol style="list-style-type: none"> <li>1. Manual approval type is selected: <ul style="list-style-type: none"> <li>- the new user account is created in the AD but the account is disabled until approval;</li> <li>- if administrator approves the enrollment AD account automatically becomes enabled;</li> <li>- if administrator rejects or deletes the registration, the user is deleted from AD (even if the registration was approved before it).</li> </ul> </li> <li>2. Automatic approval type is selected: <ul style="list-style-type: none"> <li>- the new user account is created in the AD and approved in REM. The new account is enabled straight away.</li> </ul> </li> </ol>
<b>NOTE:</b>	<p>The ‘Add Multiple Users’ button is always visible for REM Site Collection administrator, even if the option is unchecked.</p>

- *Activate Waiting List* – allows placing the potential learners in a waiting list for enrollment if there is no space currently available on the course;

<b>NOTE:</b>	<p>Once a user gets in a waiting list, the registration item will have In Waiting List status. To see registrations with In Waiting List status, go to Registrations Views &gt; All registrations.</p>
--------------	--

- *Automatic Enrollment From the Waiting List* – allows automatically enroll the next user from the waiting list when there is an available place in the course;

<b>NOTE:</b>	<p>Automatic enrollment order is based on registration creation date.</p>
--------------	---

- *Send email to Learner after Registration* – allows notifying learners about enrollment in the course via email after an enrollment confirmation page is shown;
- *Send email to Admin after Registration* – allows notifying the Site Collection Administrator about enrollment in the course via email after an enrollment confirmation page is shown;
- *Send Start Reminder* – send a reminder to the enrolled learners before Course start;
- *Comma Separated List of Days Prior to Course Offering Start Date* – set the number of days prior to the course offering start date on which the reminder to enrolled users will be sent. To send several reminders, enter several numbers of days separated by comma. Client validation will accept numeric symbols, spaces and commas only, maximum number of digits in day is 3. On field focus out list of entered days will be automatically sorted in descending order and duplicate numbers will be removed. If nothing is entered default value 5 days is used:

Send Reminder	<input checked="" type="checkbox"/>
Comma Separated List of Days Prior to Course Offering Start Date	<input type="text" value="14,10,5"/>
Reminder will be sent to the specified number of days prior to the course starting. Default is 5 days.	

- *Send Due Date Reminder* – send a reminder to the enrolled user before the Due Date;
- *Comma Separated List of Days Prior to Actual Due Date* – set the number of days prior to the course offering Due Date on which the reminder about due date will be sent to enrolled users. If nothing is entered default value 5 days is used;
- *Days Prior to Course Offering Start Date (for low users count notification)* – set the number of days prior to the course offering start date on which the reminder about low users count will be sent. If nothing is entered default value 5 days is used;
- *Send Approval Reminder* - enable the option to send a reminder to the enrolled learners;
- *Approval Time Out* - type the number of days to send Reminder(the default is 5);
- *Set Registration Status to "Course Not Completed" When Offering is Closed* – enable/disable the option;
- *Send overdue email reminder to* – specify roles to which an email reminder will be sent as well as the number of days after the due date when they will be notified. Manager role includes Manager from the CCM Profile (Line Manager), HR Responsible, and Manager added via Relationship list. Manager’s manager role includes lower hierarchy of managers (e.g. Line Manager of the manager from the Relationship list);
- *Number of days the learner stays in the learner group after the course was completed* – enable/disable the option (Actual only for Course Completed registrations);

**NOTE:** If the field is empty user will be removed automatically from SharePoint LMS Group ‘Course Learners’ and moved to SharePoint Group ‘Visitors’ after course completion.

- *Allow Cancel Registration* – enable this option to allow learners cancel their registrations (if this option is disabled, only Learners are restricted to Cancel registrations);

- *Days Prior to Course Offering Start Date* – set the number of days prior Course Offering Start Date when it will be not possible to cancel registration;
- *Cancellation Reason Required* – enable this option to make 'Cancellation Reason' required field when learner cancels his registration;

**NOTE:** Cancel Registration is not available for Material course types, even if enabled in the Enrollment template.



- *Email Templates Configuration* – specify Email Templates for the current Email Types. Disable sending separate email notifications by unchecking the 'Enabled' option in the last column;
  - *Default for course types* – check this option to make the created enrollment template default for selected Course Type;
  - *Attach ICS File To* – select Course Types to attach an ICS file to email notifications;
  - *Close Offering When Access Period Expired For* – select Course Types for which Course Offerings status will be changed to 'Closed' after access period expiration;
4. Click OK to save the changes. You will be redirected to the created Enrollment Template page (including User Information and Invoice Address web parts):

**User Information**

User Information  Add Multiple Users

▶ Select existing users to enroll

Faculty 1;

**Due Date**

Due Date  days after enrollment

**Payment**

Payment Type

For Members 10.00 USD

For Non-Members 20.00 USD

For others 30.00 USD

**Invoice Address**

Company

Email

Street

City

State

Country

ZIP code

Telephone

Accept  [Terms and Conditions](#)

For detailed information on these web parts see the Chapter 4.1.1.3. [Enrollment Templates Web Parts](#).

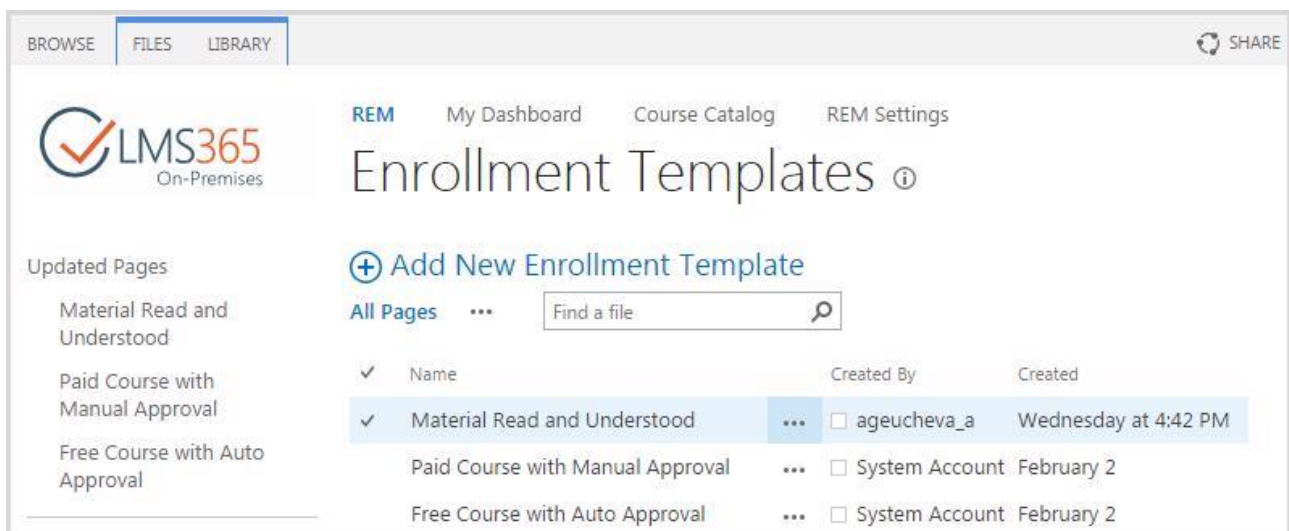
5. Click Close to leave this Enrollment Template page and be redirected to the Enrollment Templates list.

#### 4.1.1.2 *Editing Enrollment Template*

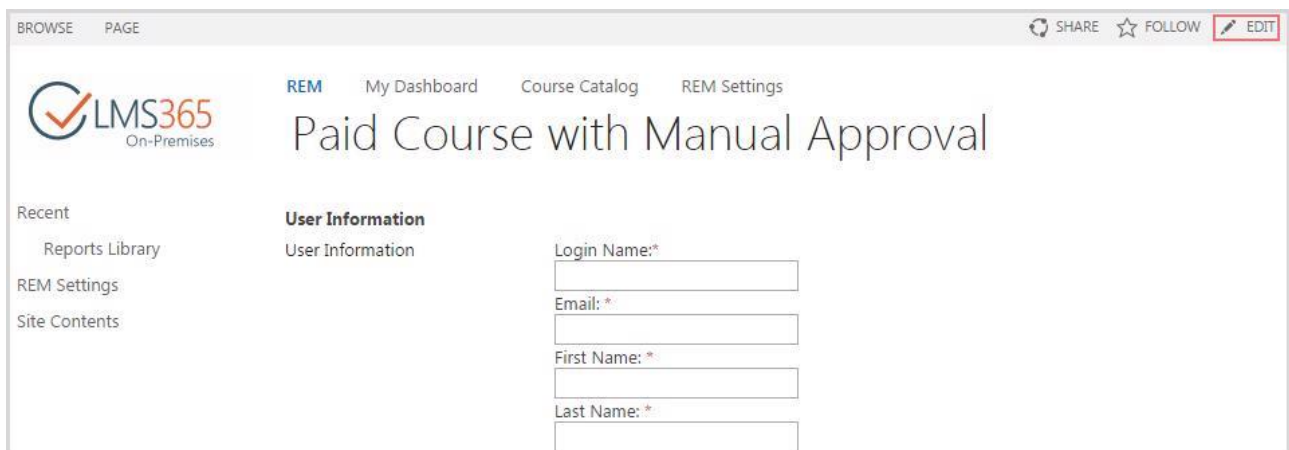
After you have created an Enrollment Template, you can enter the *Editing Mode* to add, modify, and remove Web Parts that can be shown in the template, or edit template properties.

To edit an Enrollment Template, do the following:

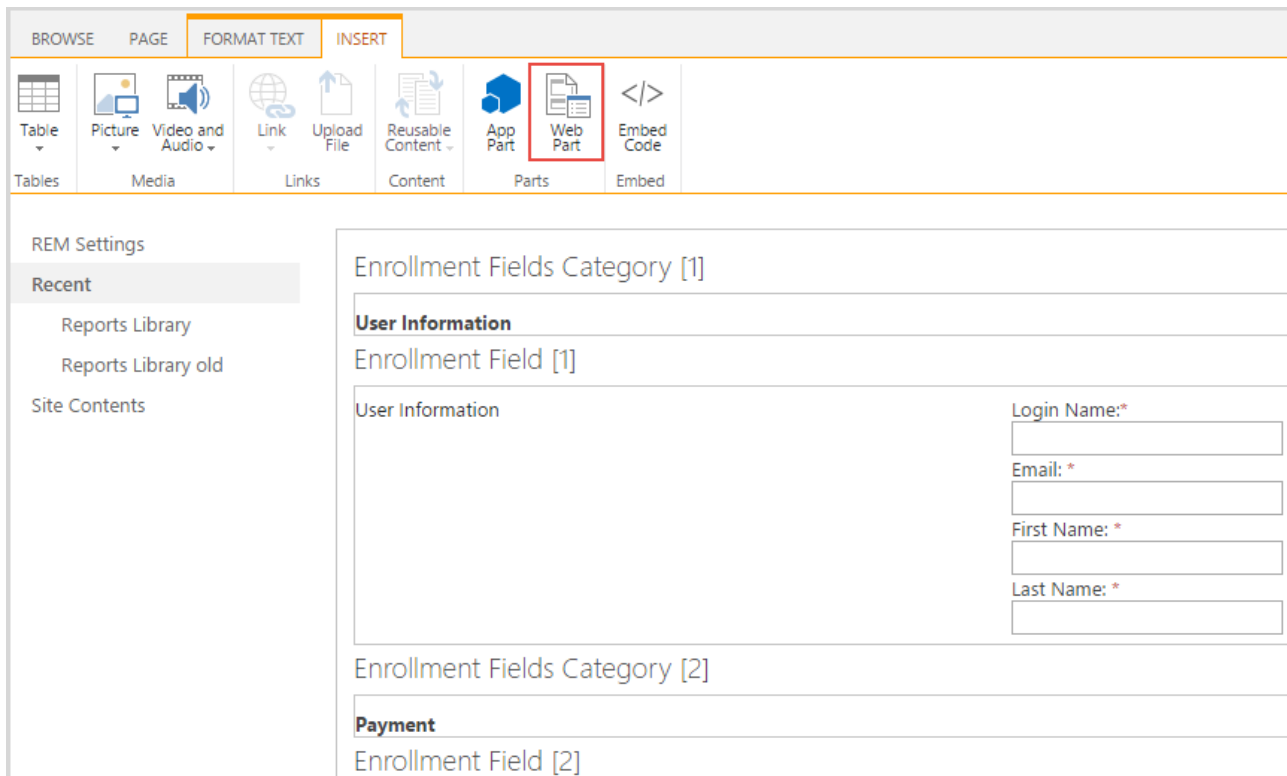
1. Go to the Enrollment Templates section and click the name of the needed template to open it:



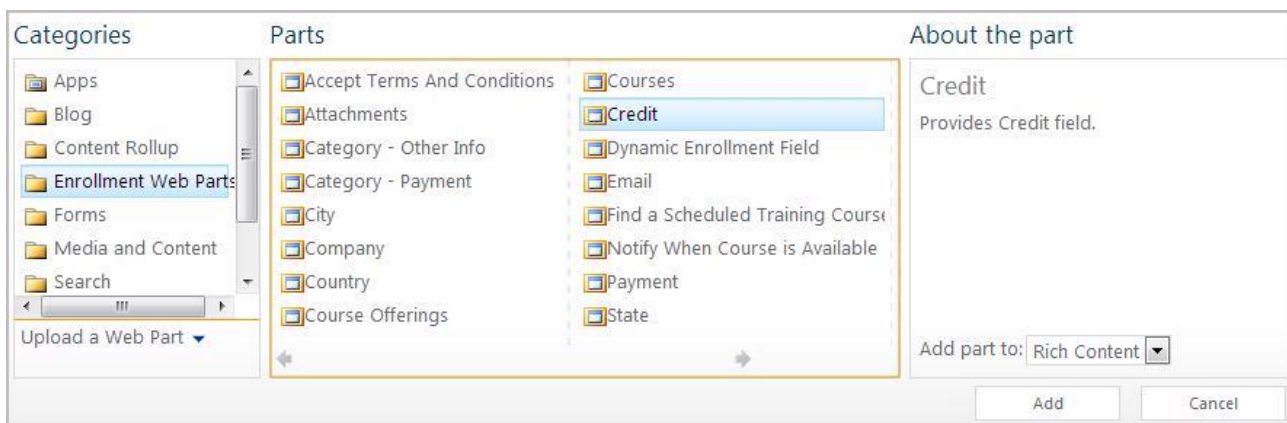
2. Click Edit to edit the page:



3. To add a Web Part to the selected template go to Insert > Web Part:



4. Choose the needed Web Part from the list and click the Add button (you can add several Web Parts to the template):



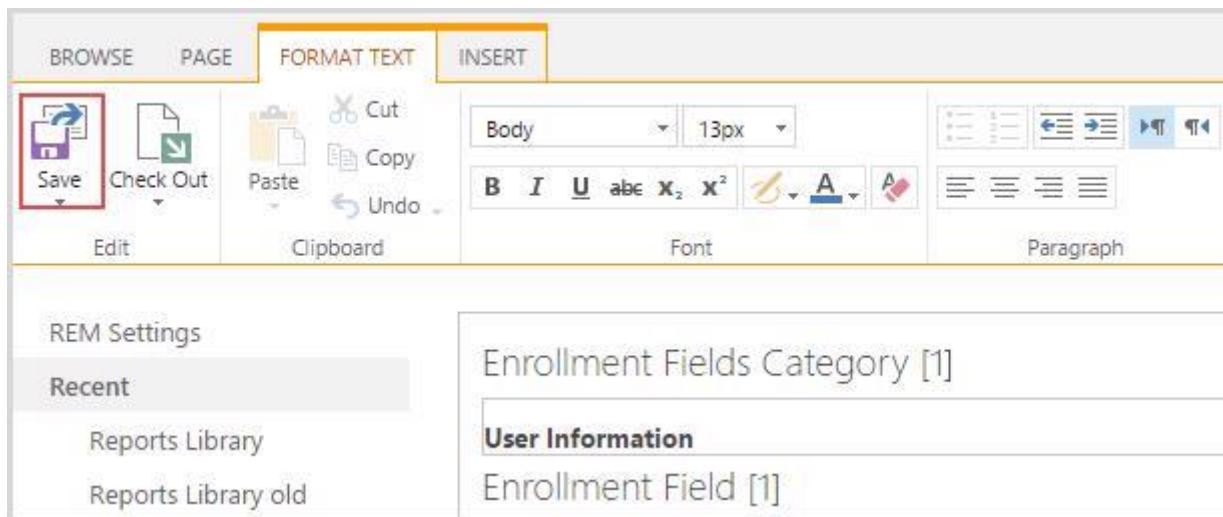
**NOTE:** To change the order of Web Parts, use drag-and-drop function.

**NOTE:** To adjust any Web Part, select a Web Part, click Options in the Web Part Tools tab on the toolbar, and then click Web Part Properties (or click the down arrow next to the Web Part name, and then select Edit Web Part). In the open window, modify appearance the web part as needed. Click Apply to apply changes. Click OK to save changes and close the properties window.

To delete a Web Part, select a Web Part, click Options on the Web Part Tools menu, and then click Delete. Click OK to confirm.

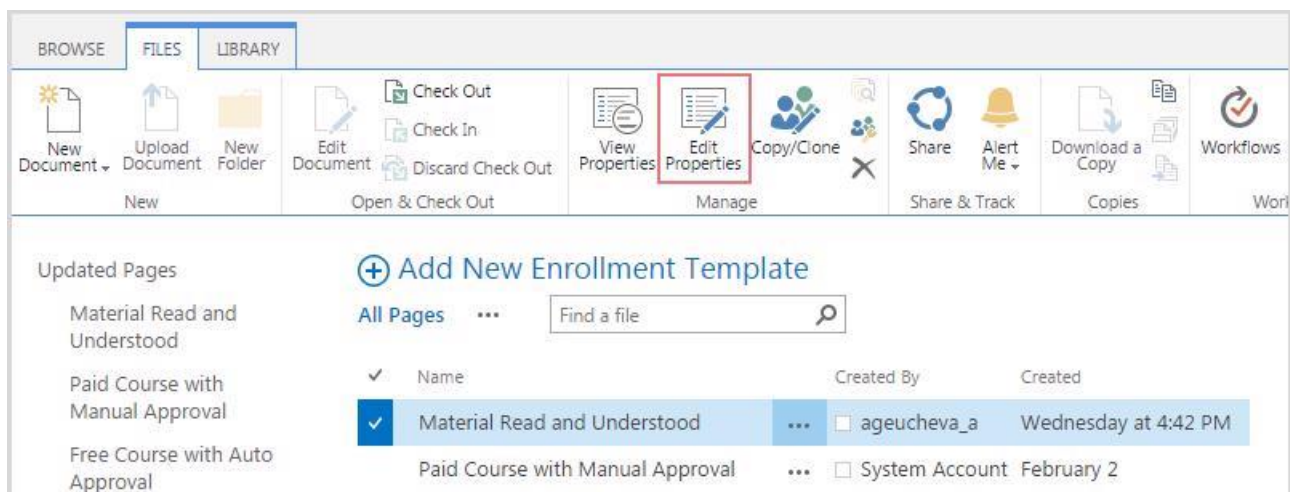
- NOTE:** The User Information and Payment Type units are strictly required to be able to enroll in the course.
- NOTE:** You can also upload tables, graphics, links and files to the template, apply different styles and format to the text, and change template properties.

5. Click Save to exit the *Editing mode* and save the changes:



To edit the enrollment template properties, do the following:

1. Check the box against the needed Enrollment Template and click Edit Properties in the ribbon:





2. Make all necessary changes:

REM My Dashboard Course Catalog REM Settings

## Enrollment Templates ▸ Material Read and Understood

Name *	<input type="text" value="Material Read and Understood"/>
Language	<input type="text" value="English (United States)"/>
Payment Type *	<input type="text" value="Free"/>
Approval Type	<input type="text" value="Automatic"/>
Approval Workflow	<input type="text" value="none"/>
People who can automatically approve registration requests	<input type="text"/> <small>Enter users and groups separated with semicolons.</small>
Max Number of Attachments	<input type="text" value="1"/>
Max Size of one Attachment	<input type="text" value="100"/> <small>Size in KB</small>

3. Click Save to save the changes and close the form.

### 4.1.1.3 Enrollment Templates Web Parts

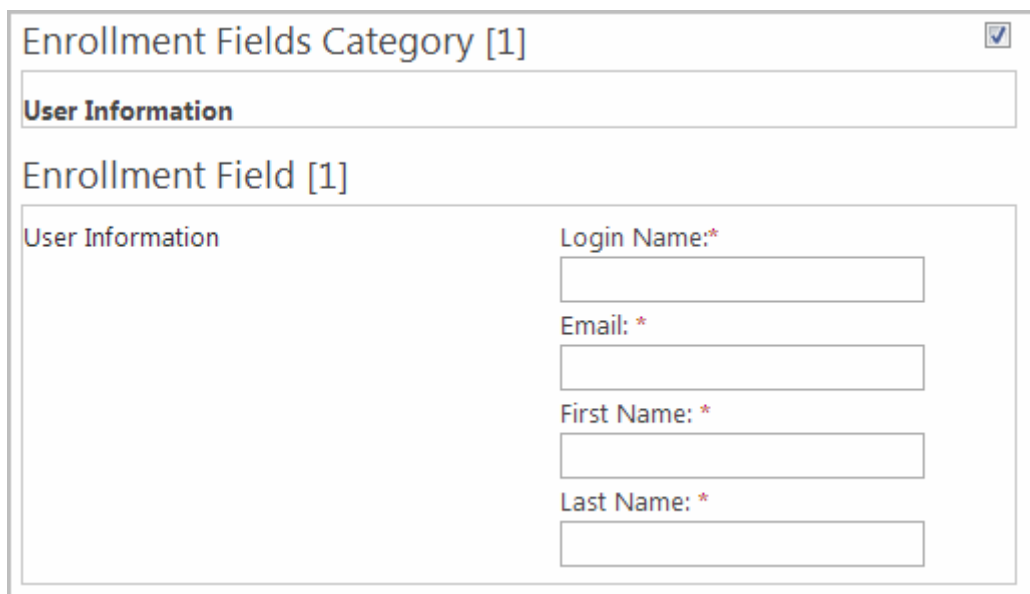
The following Web Parts can be included in Enrollment Template:

- User Information Web Part;
- Payment Type Web Part;
- Text Values Web Part;
- Notify When Course is Available Web Part;
- Terms and Conditions Web Part;
- Dynamic Enrollment Field Web Part.

#### 4.1.1.3.1 User Information Web Part

In the User Information Web Part users who want to register for a course will type their login name, email, first and last names. If the user is authorized, this information will be taken from the user profile and completed automatically.

In the Editing mode, you can modify the Web part name, layout, size:



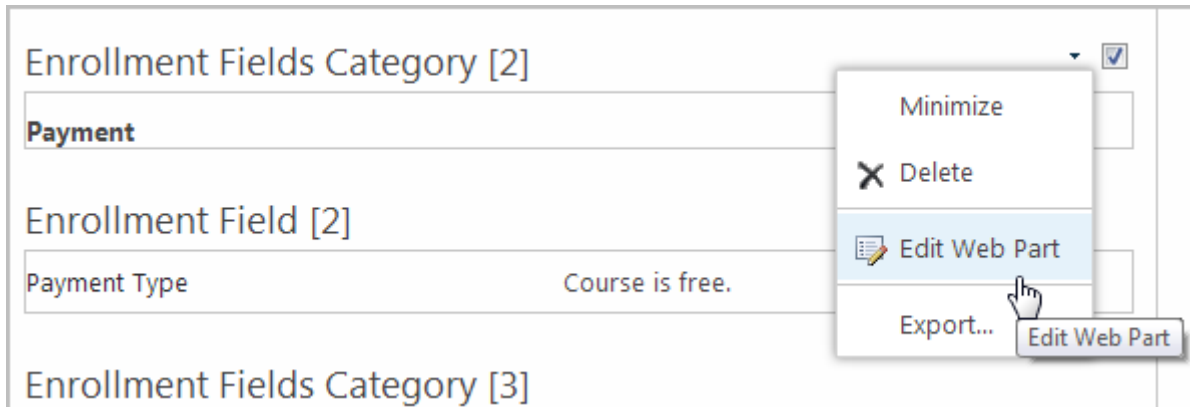
The screenshot displays a web part configuration window titled "Enrollment Fields Category [1]". Inside, there is a section labeled "User Information" which contains an "Enrollment Field [1]". This field is configured with four text input boxes, each with a label and an asterisk indicating it is required: "Login Name:\*", "Email: \*", "First Name: \*", and "Last Name: \*".

#### 4.1.1.3.2 Payment Type Web Part

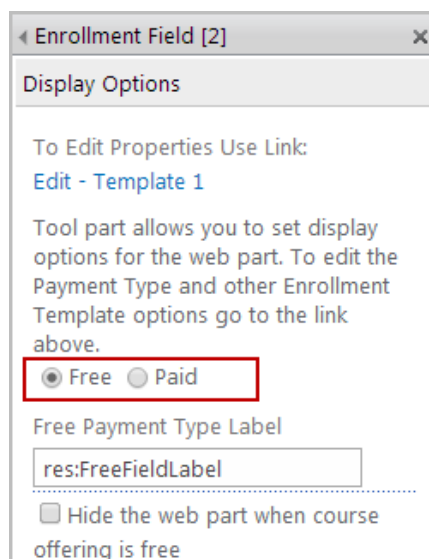
You set the payment options during the template creation; you can view them through the Payment Type Web part. To switch to a different payment type (Free/Paid) you need to [edit the template properties](#). The link for editing is also provided in the Payment Type Web part.

To edit Payment Type Web Part, do the following:

1. Enter the Editing Mode;
2. Select a Web Part, and then on the toolbar, click Options > Web Part Properties OR click the down arrow by the Web Part name, and then select Edit Web Part:



3. To view the payment options specified earlier, on the open menu on the right, select a payment mode (Free or Paid):



- If Free mode is selected, it is not displayed on the Enrollment form;
- In the Paid mode, you will be displayed the prices options specified during the template creation and can perform several actions:

← Enrollment Field [2] ✕

### Display Options

To Edit Properties Use Link:  
[Edit - Template 1](#)

Tool part allows you to set display options for the web part. To edit the Payment Type and other Enrollment Template options go to the link above.

Free
  Paid

---

Members Field Heading

Price for Members

Show Member price option

---

Non Members Field Heading

Price for Non-Members

Show Non Member price option

---

Other Field Heading

Price for Others

Show Other price option

---

Invoice Template



---

VAT %

 %
 

Display prices with VAT

---

Currency code



---

Coupon Settings:

Show text box for a coupon code

- Select the checkboxes for the options you want to be visible on the template;
  - Modify the Field headings names if needed. Enrollment Template supports several languages regardless of what language packs are installed on the server. Field headings names should contain the prefix "res:" and the name of the necessary key. (For more information about language recourses, see "Email Template Languages" in the *REM Installation Guide*);
  - To modify the price for Members, Non-Members, and Others, change the Coupon Settings, currency code and invoice template, click the Edit ( [Edit - Template 1](#) ) link. For details on completing the open form, see [Creating Enrollment Template](#) section;
  - In the *Coupon Settings* field, select the checkbox if you want the price to be shown for users already with the discount;
4. Click OK or Apply on the bottom of the form;
  5. Click Save to exit the *Editing Mode* and save the changes.

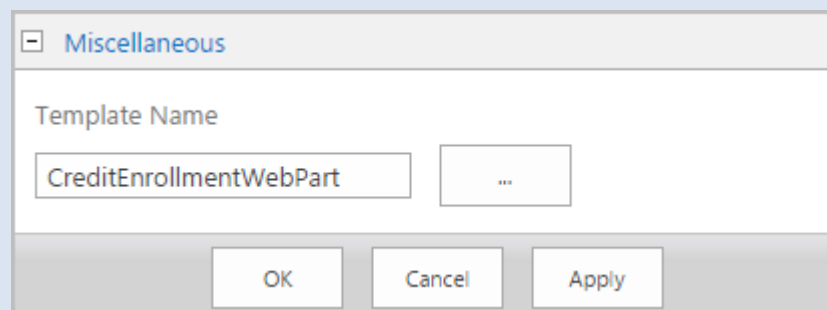
#### 4.1.1.3.3 Credit Web Part

Credit web part allows to add field in which learners can enter their Credit codes.

To edit Credit web part, do the following:

1. Enter the Editing Mode;
2. Click the drop-down arrow against the web part name and select Edit Web Part;
3. Modify the Web part appearance, layout, advanced options as needed;
4. To make this field obligatory for learners, enable the Value Required option in the Validation section;

**NOTE:** The web part property 'Template Name' in the Miscellaneous section is an advanced administrator setting intended to help them modify the look and feel of the web part. It is not just the title that you can change – It may result in the exception on the enrollment template page:



5. Click OK or Apply to close this window;
6. Click Save and Close to exit the *Editing Mode* and save the changes.

#### 4.1.1.3.4 *Text Values Web Parts*

The Enrollment Template Web Part page contains certain text value Web Parts where users will have to complete the information for invoicing for the course. By default these are:

- Login Name;
- Email;
- First Name;
- Last Name;
- Company;
- Email;
- Street;
- City;
- State;
- Country;
- Zip code;
- Telephone:

Enrollment Fields Category [1]

User Information

Enrollment Field [1]

User Information	Login Name: *
	<input type="text"/>
	Email: *
	<input type="text"/>
	First Name: *
	<input type="text"/>
	Last Name: *
	<input type="text"/>

Enrollment Field [2]

Payment Type

Enrollment Fields Category [2]

Invoice Address

Enrollment Field [3]

Company

Enrollment Field [4]

Email \*

Enrollment Field [5]

Street

Enrollment Field [6]

City

Enrollment Field [7]

State

Enrollment Field [8]

Country

Enrollment Field [9]

ZIP code

Enrollment Field [10]

Telephone

Enrollment Field [11]

If the selected course is full, **please, notify me**, when a place becomes available:

Enrollment Field [12]

Accept  [Terms and Conditions](#)

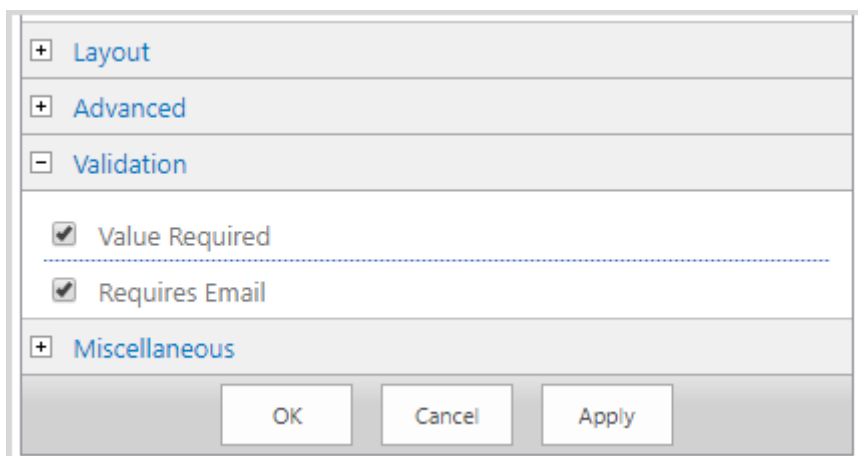
You can delete the unnecessary fields or change the order of them in a list.

To edit a Text Value Web Part, do the following:

1. Enter the Editing Mode;
2. Click the drop-down arrow against the web part name and select Edit Web Part:



3. Modify the Web part name, layout, size as needed. To change the order of the fields, use the drag-and-drop function;
4. If you want to make some fields obligatory for learners, enable the Value Required option in the Validation section (only an Email field is required by default):



5. Click OK or Apply to close this window;
6. Click Save to exit the *Editing Mode* and save the changes.

#### 4.1.1.3.5 Notify When Course is Available Web Part

If the course is already full, the Notify When Course is Available Web Part allows to alert users when places in the course become available. This section is displayed on the template only if the Activate



Waiting List checkbox was selected during template creation (see the [Creating Enrollment Template](#) section):

Notify When Course is Available

If the selected course is full, **please, notify me**, when a place becomes available:

#### 4.1.1.3.6 Terms and Conditions Web Part

With Terms and Conditions option on the template, users are obliged to accept Terms and Conditions of a course enrollment before subscribing to this course:

Accept Terms And Conditions

Accept  Terms and Conditions


The Terms and Conditions Web Part contains the checkbox for accepting registration terms. If you do not want to use it for the course, simply delete the Web part.

#### 4.1.1.3.7 Due Date Web Part

Due Date web part on the template allows site collection administrator, LMS Administrator or teacher to change the due date whilst enrolling learners into a course offering with the previously set due date (learners and managers do not see this field):

Due Date

**Due Date**


Due Date  

#### 4.1.1.3.8 Dynamic Enrollment Field Web Part

When an Administrator feels lack of text value Web Parts, which users will have to complete to enroll in the Course, he/she can create an additional Web Part Field to fill. To create a Dynamic Enrollment Field web part, do the following:

1. Go to the Enrollment Templates section and click the name of the needed template:

BROWSE FILES LIBRARY SHARE


REM
My Dashboard
Course Catalog
REM Settings

## Enrollment Templates ⓘ

[+ Add New Enrollment Template](#)

All Pages ...  🔍


<input checked="" type="checkbox"/>	Name		Created By	Created
<input checked="" type="checkbox"/>	Material Read and Understood	...	<input type="checkbox"/> ageucheva_a	Wednesday at 4:42 PM
<input type="checkbox"/>	Paid Course with Manual Approval	...	<input type="checkbox"/> System Account	February 2
<input type="checkbox"/>	Free Course with Auto Approval	...	<input type="checkbox"/> System Account	February 2

Updated Pages

- Material Read and Understood
- Paid Course with Manual Approval
- Free Course with Auto Approval

2. Click Edit to edit the page:

BROWSE PAGE SHARE FOLLOW EDIT


REM
My Dashboard
Course Catalog
REM Settings

## Paid Course with Manual Approval

Recent

- Reports Library
- REM Settings
- Site Contents

**User Information**

User Information

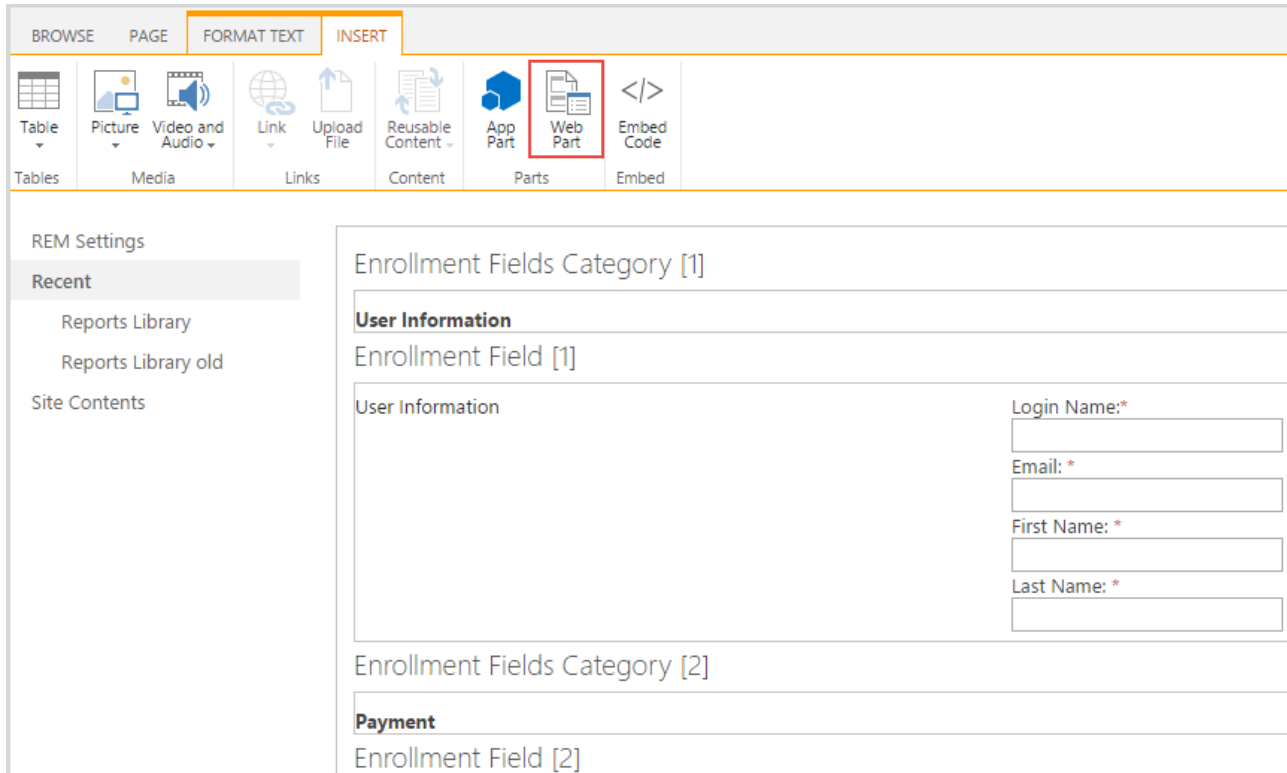
Login Name:\*

Email: \*

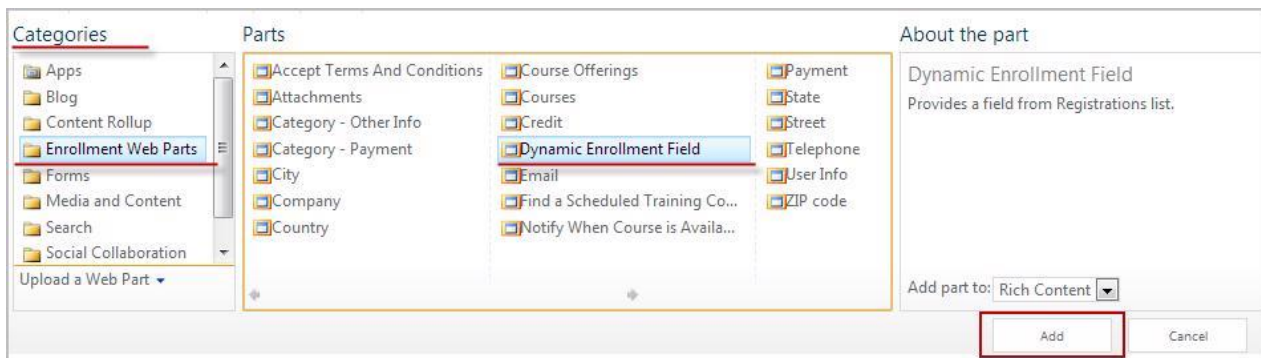
First Name: \*

Last Name: \*

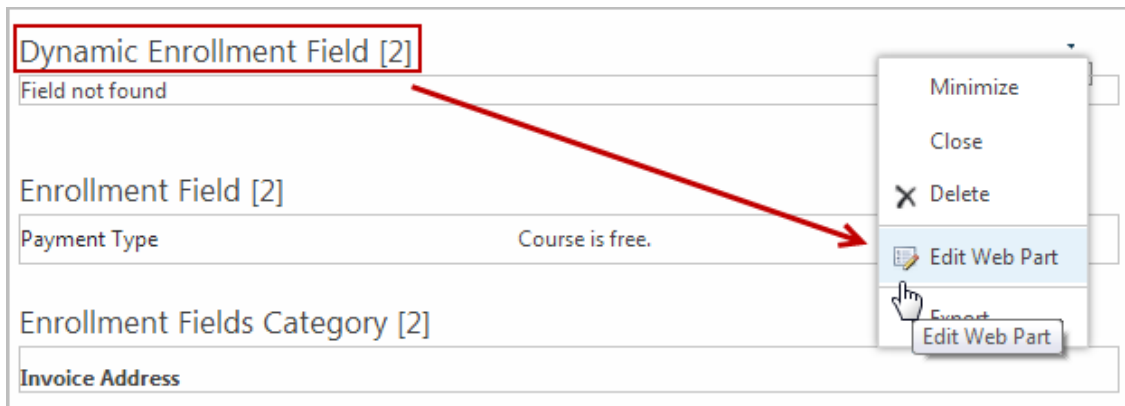
3. Go to Insert > Web Part:



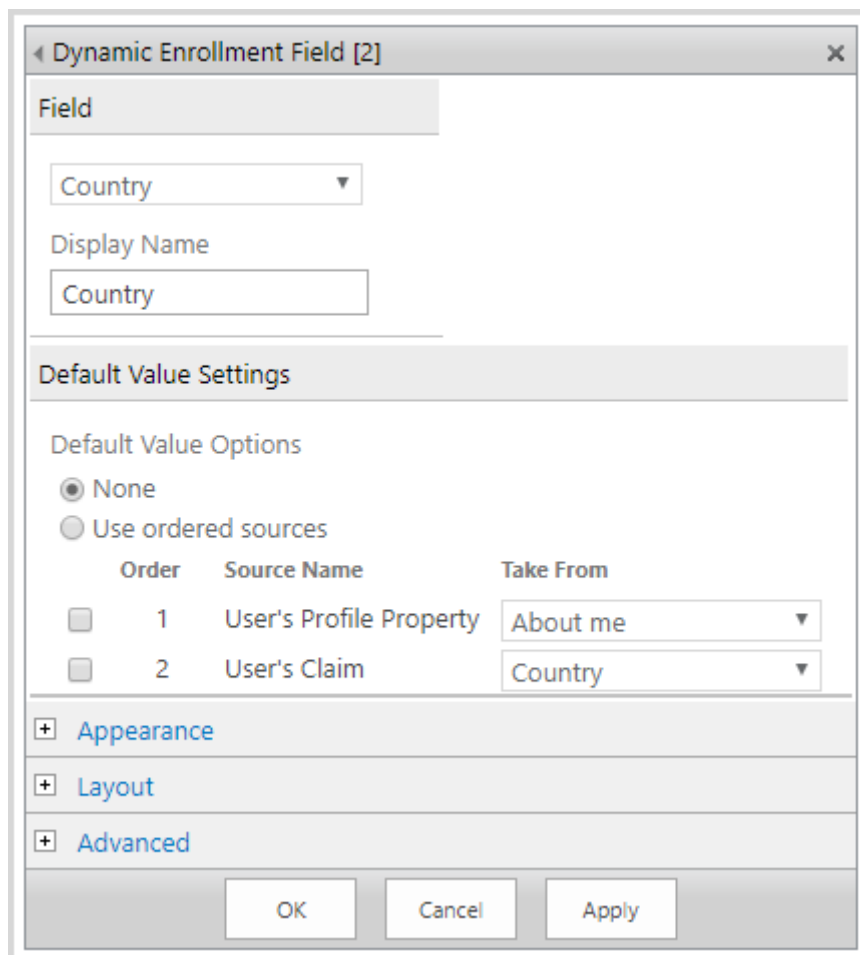
4. Go to Categories > Enrollment Web Parts > Dynamic Enrollment Field and click the Add button:



5. Click the drop-down arrow against the web part name and select Edit Web Part:



- In the Field section, specify the Display Name for this new field (column) manually or select it from the drop-down list:



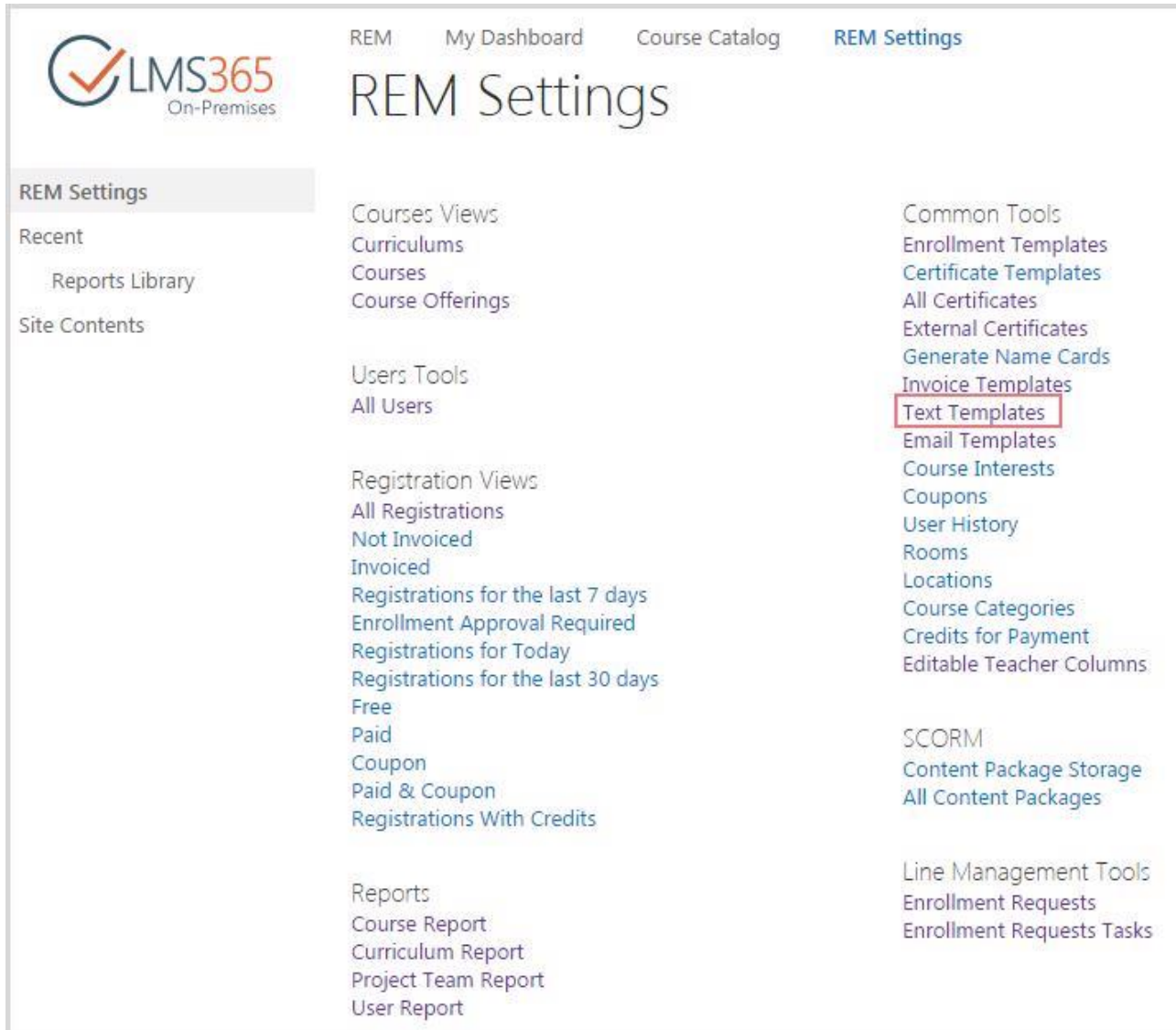
**NOTE:** To create a new column for the Dynamic Enrollment field, do the following:

- Go to the All Registrations section;
- On the ribbon menu go to List > Create Column;
- Complete the needed fields in the open form;
- Click OK to add the new column to the Field drop-down list.

7. Click OK or Apply to close this window;
8. Click Save to exit the *Editing Mode* and save the changes.

## 4.1.2 Text Templates Management

The Text Templates tool represents the document library for creating standard text templates:



After a user enrolls in a course, the confirmation page will be shown. The confirmation page text is taken from such templates, depending on:

- The course is full or not;
- The course has a waiting list or not.

There are several types of text templates available:

### Text Templates ⓘ

All Items ... Find a file 🔍

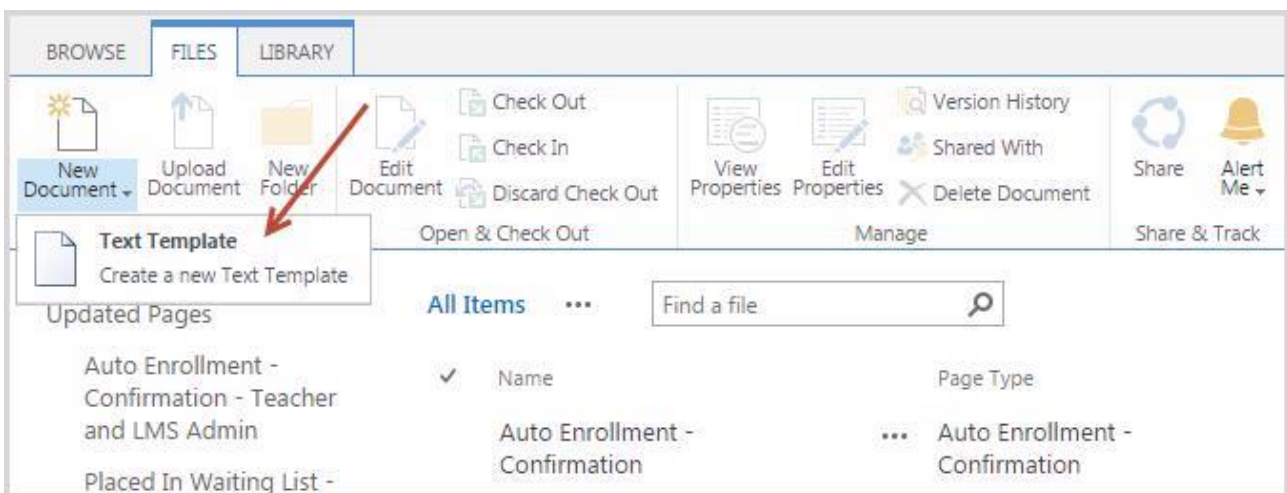
✓ Name	Page Type	Modified	Created By	Created
Auto Enrollment - Confirmation	... Auto Enrollment - Confirmation	July 27	<input type="checkbox"/> System Account	July 27
Course Full - Confirmation	... Course Full - Confirmation	July 27	<input type="checkbox"/> System Account	July 27
Manual Enrollment - Confirmation	... Manual Enrollment - Confirmation	July 27	<input type="checkbox"/> System Account	July 27
Placed In Waiting List - Confirmation	... Placed In Waiting List - Confirmation	July 27	<input type="checkbox"/> System Account	July 27
Terms And Conditions Page	... Terms And Conditions Page	July 27	<input type="checkbox"/> System Account	July 27
Auto Enrollment - Confirmation - Teacher and LMS Admin	... Auto Enrollment - Confirmation - Teacher and LMS Admin	July 27	<input type="checkbox"/> System Account	July 27
Wait for Start Date	... Wait for Start Date	August 12	<input type="checkbox"/> System Account	July 27

#### 4.1.2.1 Creating Text Templates

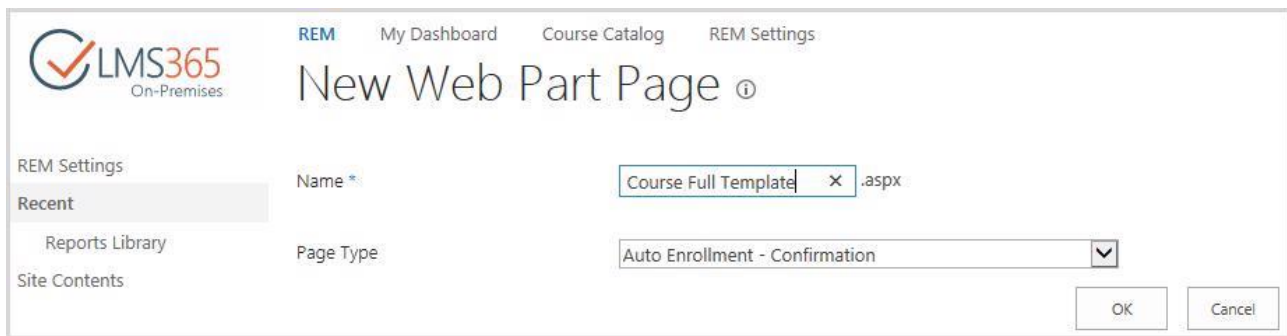
**NOTE:** Text templates of all types are already created by default. To create a custom text template you have to delete the existing one of the needed type.

To create a new Text Template, do the following:

1. Go to Text Templates section;
2. On the ribbon menu go to Files > New Document > Text Template:



3. Complete the open form (both fields are required):



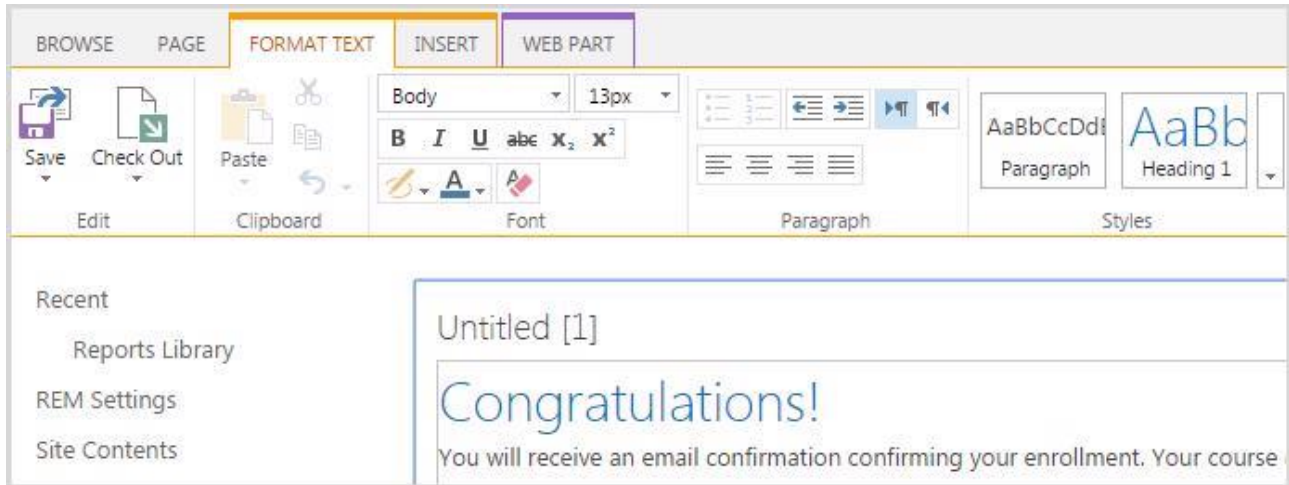
- *Name* – type the name of a new text template;
- *Page Type* – you can create only one template of every type. When a template of certain type is added, it will be disabled in the Page Type drop-down list. You can select between:
  - *Auto Enrollment – Confirmation* – this field is shown to a user if the course is not full and has an auto-approval enrollment;
  - *Manual Enrollment – Confirmation* – this field is shown if the course is not full and manual approval is needed;
  - *Course Full – Confirmation* – this field is shown if the course is full and has no waiting list;
  - *Placed in Waiting List – Confirmation* – this field is shown if the course is full, but has a waiting list;
  - *Terms and Conditions Page* – this field is shown after clicking the Terms and Conditions link in the Enrollment Template.

2. Click OK to save the changes. You will be redirected to the page for [Editing Text Template Web Parts](#).

#### 4.1.2.2 Editing Text Template Web Parts

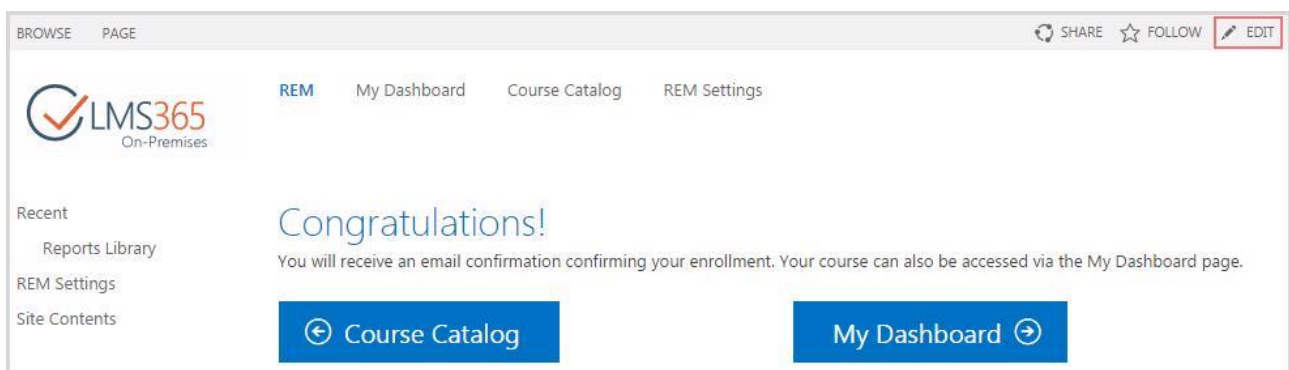
After you created a Text Template, you can enter the Editing Mode to add, modify, and remove Web Parts that can be shown in the template or edit template properties:



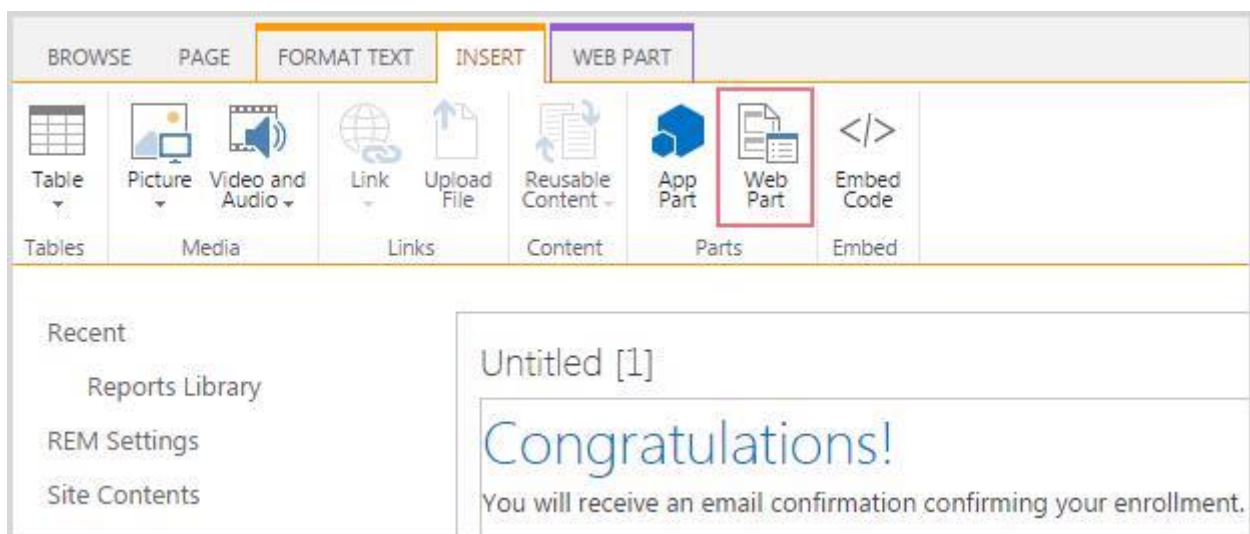


To edit a Text Template, do the following:

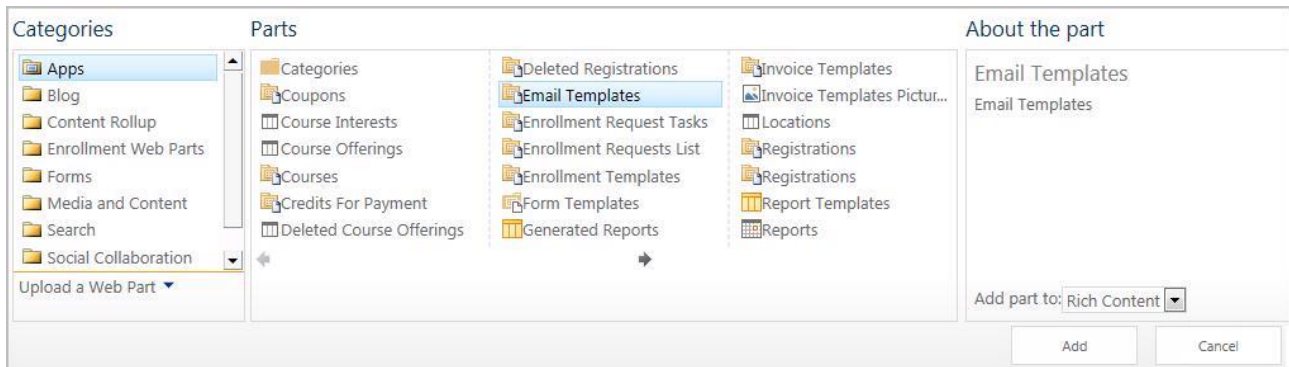
1. Open the Text Templates section and click the name of the needed template to open it;
2. Click Edit to edit the Web Part Page:



3. To add a Web Part to the selected template go to Insert > Web Part:



- Choose the needed Web Part you want and click the **Add** button (you can add several Web Parts to the template):

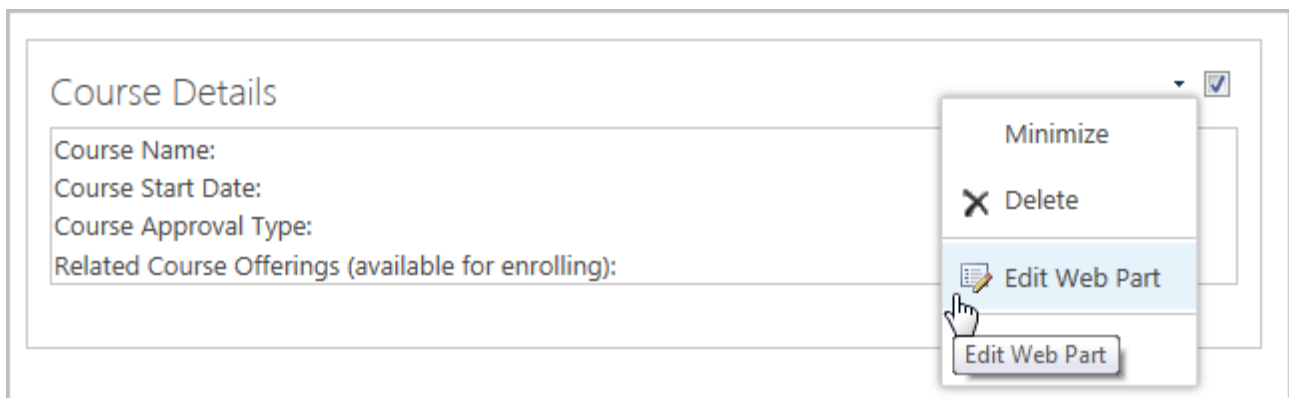


**NOTE:** To change the order of Web Parts, use drag-and-drop function.

To adjust any Web Part, select a Web Part, click Options in the Web Part Tools tab on the toolbar, and then click Web Part Properties (or click the down arrow next to the Web Part name, and then select Edit Web Part). In the open window, modify appearance the web part as needed. Click Apply to apply changes. Click OK to save changes and close the properties window.

To delete a Web Part, select a Web Part, click Options on the Web Part Tools menu, and then click Delete. Click OK to confirm.

- To modify the Web Parts layout, order, or size, click the drop-down arrow next to the Web part name, and click Edit Web Part:

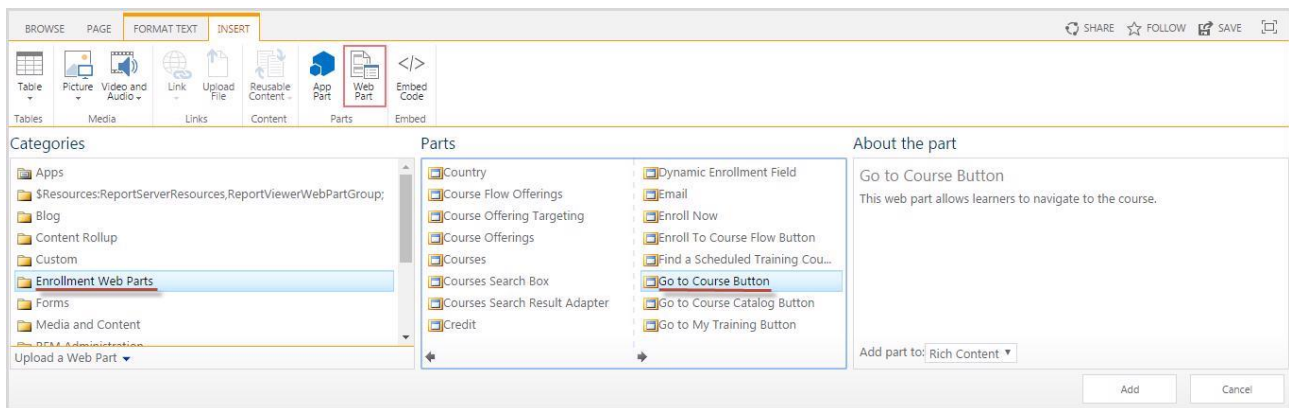


- You can also upload tables, graphics, links and files to the template, apply different styles and format to the text;
- After all changes are made, click Save to exit the *Editing Mode* and save the changes.

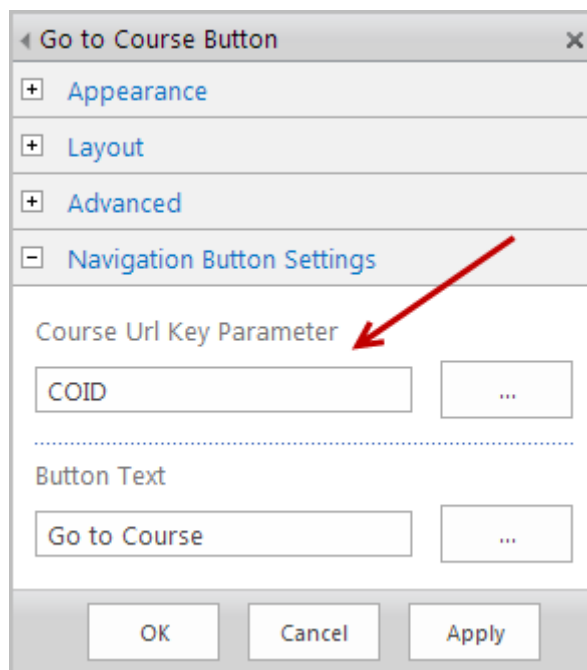
#### 4.1.2.2.1 Adding Go to Course web part

To add the “Go to Course” web part, do the following actions:

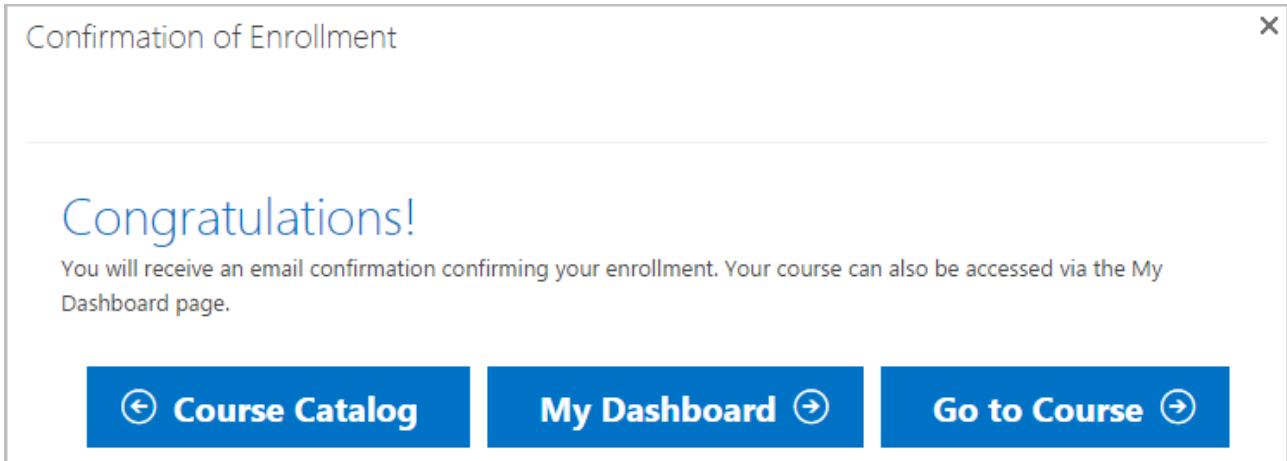
1. Go to Text templates section;
2. Select Auto Enrollment – Confirmation text template and open it for editing;
3. In the ribbon menu select Insert > Web Part and find Go to Course Button in the Enrollment Web Parts section and click the Add button:



4. Edit this web part and set the Course Url Key Parameter to 'COID':



5. The web part will be displayed for Learner after enrollment to the course:



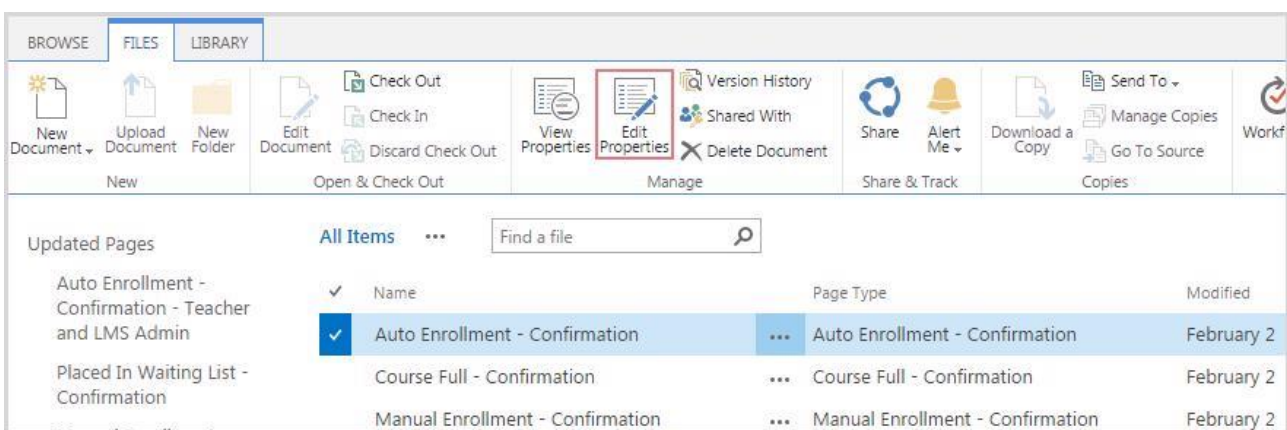
**NOTE:** The Web part can be used on any Text Template with type "Confirmation" and will only be visible when the current user is a Learner in the current course i.e. has registrations with status Enrolled for the course.

- When the Learner clicks on the "Go to Course" button, he/she is redirected to the registration details page.

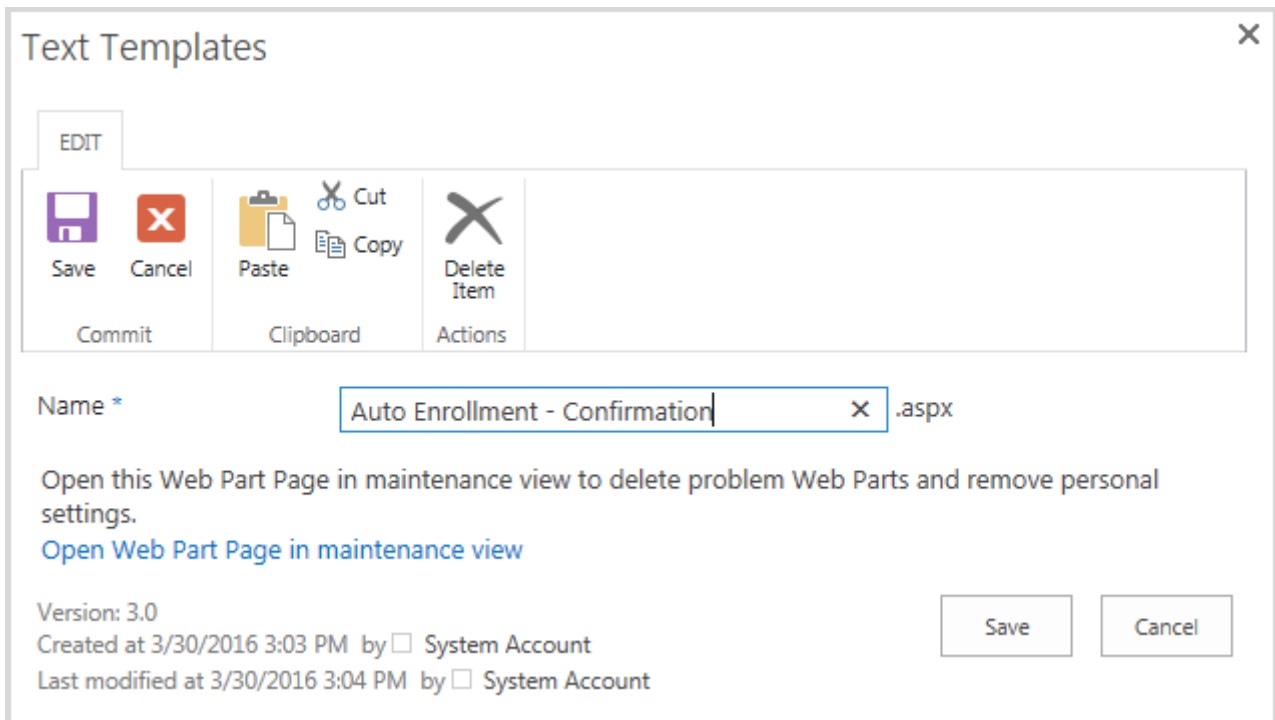
#### 4.1.2.3 Editing Text Template Properties

To edit properties of existing text templates, do the following:

- Click the box against the name of the needed text template and click Edit Properties on the ribbon menu:



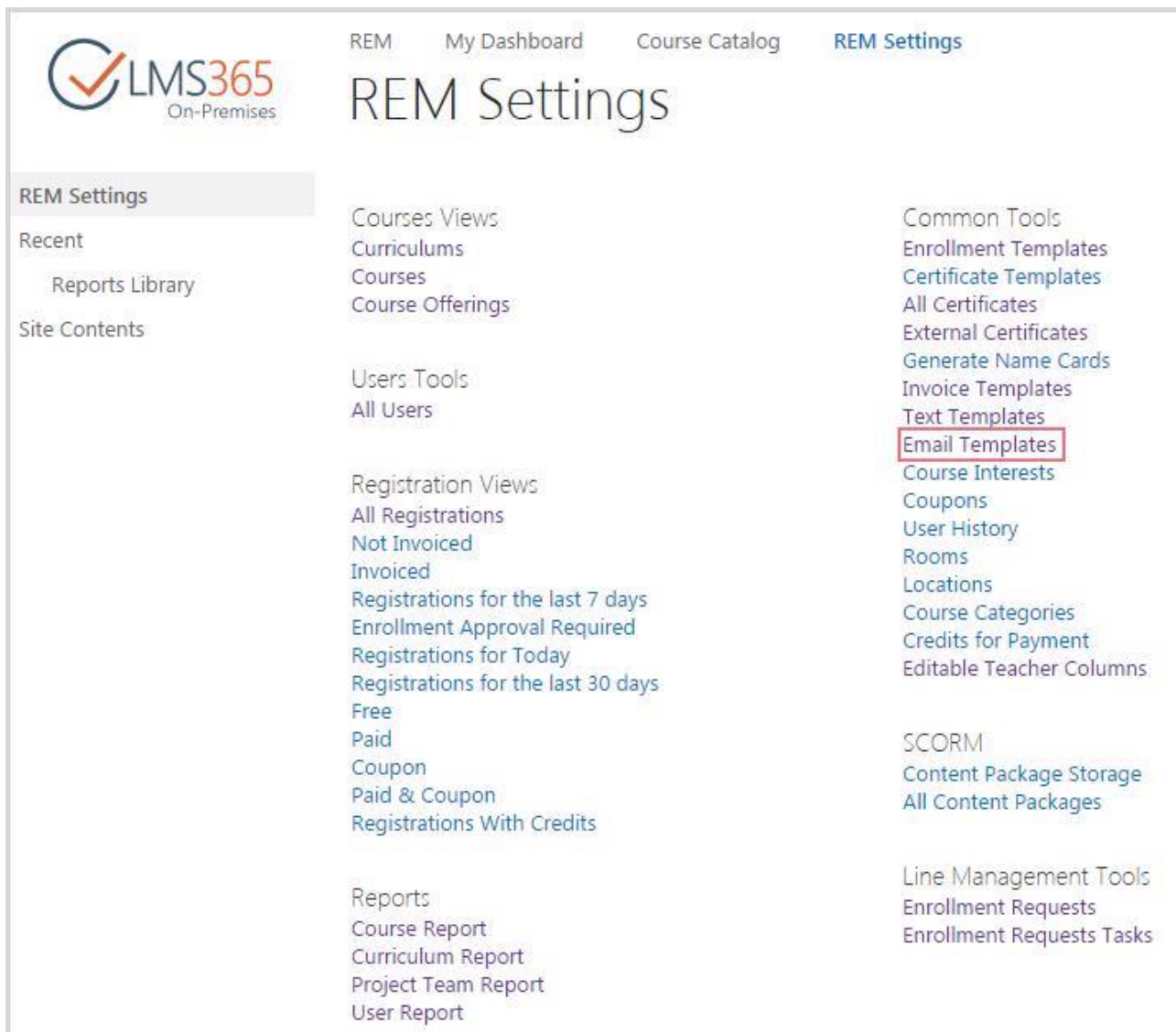
- Make all necessary changes in the open form:



3. Click Save to save the changes. Click Cancel to discard the changes.

### 4.1.3 Email Templates Management

LMS administrator has an option to send an email template to notify learners about successful enrollment, course availability, credentials, password change, and so on:




There is a default email template for each of the types of available notifications but you can as well create custom templates or modify the existing ones.

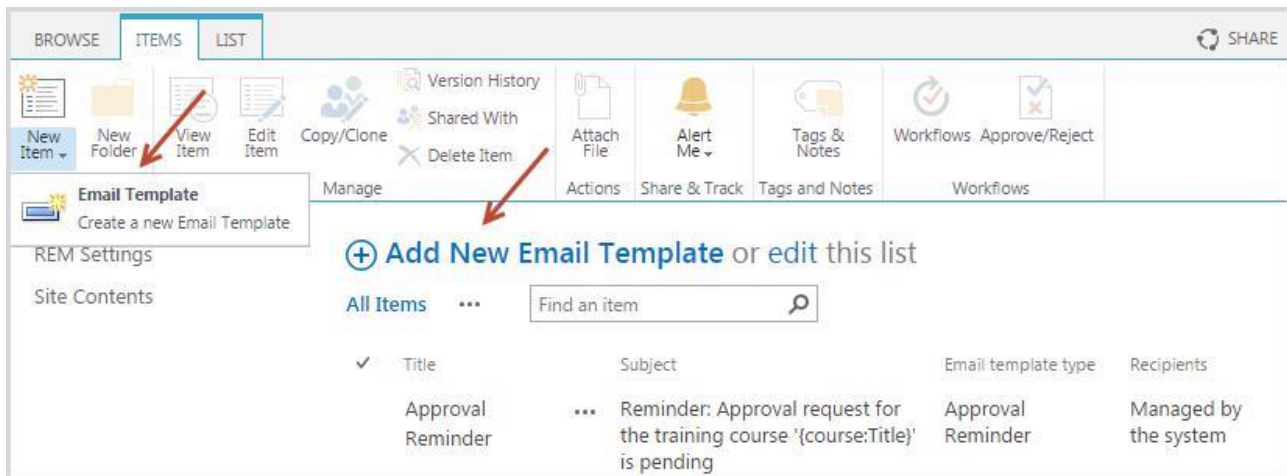
**NOTE:** Email Templates, created in this section, can be then selected in the needed [Enrollment Template](#). Each enrollment template has default email templates which can be overridden for custom ones.

#### 4.1.3.1 *Creating Email Template*

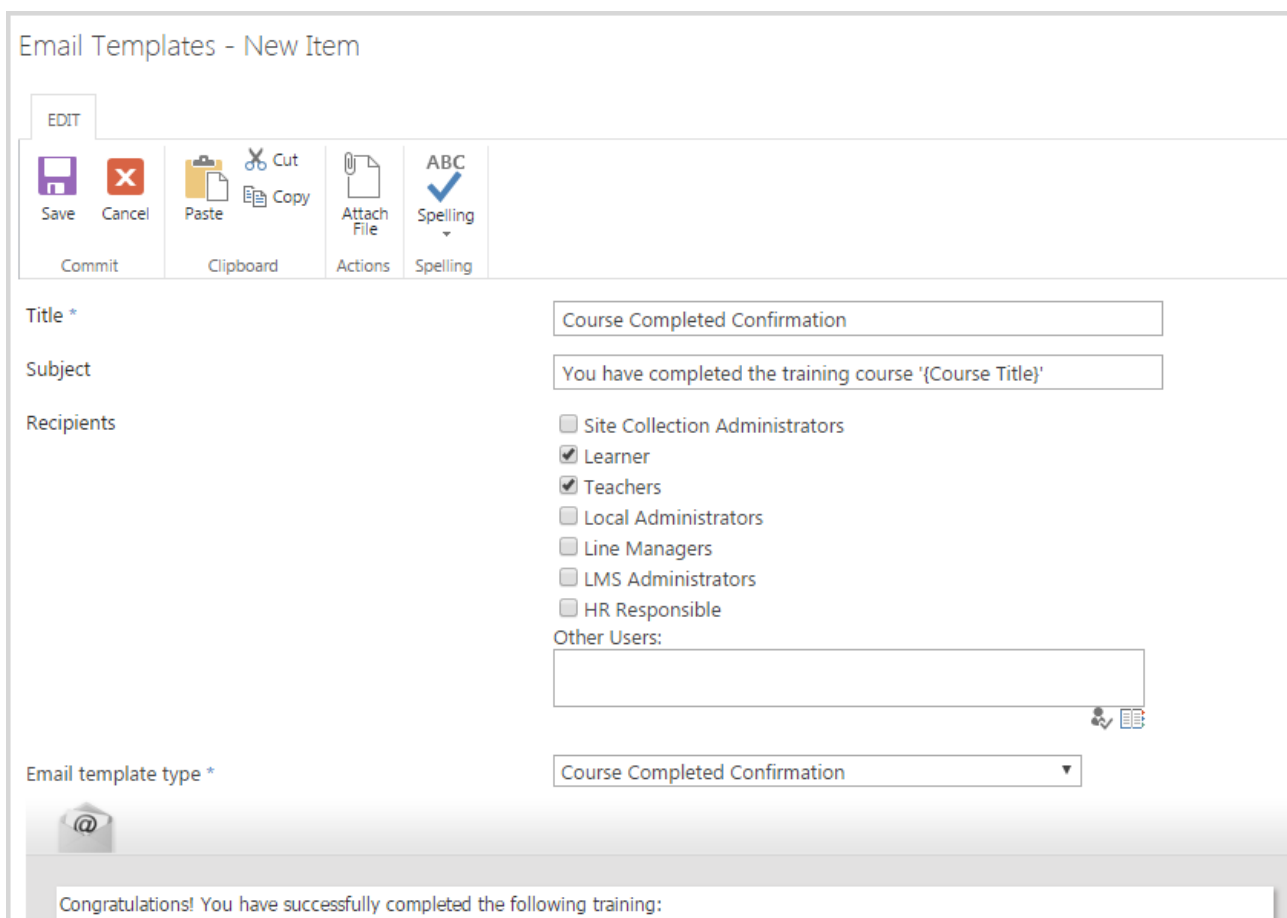
To create an Email template, do the following:

1. Click Email Templates;

- On the ribbon menu go to Items > New Item > Email Template or click Add New Email Template button :



- Specify the title and necessary email template type:



The screenshot shows the 'Email Templates - New Item' form. The 'Title' field contains 'Course Completed Confirmation'. The 'Subject' field contains 'You have completed the training course '{Course Title}''. The 'Recipients' section has checkboxes for 'Learner' and 'Teachers' selected. The 'Email template type' dropdown is set to 'Course Completed Confirmation'. A preview of the email content is shown at the bottom: 'Congratulations! You have successfully completed the following training:'.

- Title* – specify the name for this email template;
- Subject* – type the subject of the email;

- *Recipients* – select the groups which will receive the email;
  - *Other Users* – use picker to specify separate user who will receive the email;

**NOTE:** Recipients field is not visible for Approval Reminder, Certificate Has Expired, Certificate is Expiring Reminder, Course Offering Ended Notification Email Templates types.

**NOTE:** Recipients in default email templates have value according to configuration (REM4Configuration.xml).

- *Email Template Type* – choose the message type from the drop-down list:
  - *Course Offering Ended Notification* – email notifying users managed by the system that course offering has ended;
  - *Approval Reminder* – email notifying users managed by the system about pending enrollment request;
  - *Certificate Has Expired* – email notifying users managed in the course item that his certificate has expired;
  - *Certificate Is Expiring Reminder* – email notifying users managed in the course item that his certificate will soon expire;
  - *Change Email – Learner* – email notifying a registered learner about email changing;
  - *Course Available Confirmation* – email notifying a learner in the waiting list about space available in a course;
  - *Course Completed Confirmation* – email notifying an enrolled learner that the course is completed;

**NOTE:** To add a course title of the existing course for which an external certificate has been granted to this notification, please specify {registrations:course\_name} macros in the template.

- *Material Course Completed Confirmation* – email notifying enrolled learner that material course is completed. Is created when Material Course feature is enabled;
- *Course Completion Due Date Reminder* – email notifying an enrolled learner about course completion due date;
- *Material Completion Due Date Reminder Notification* – email notifying an enrolled learner about material course completion due date. Is created when Material Course feature is enabled;
- *Course Enrollment Confirmation* – email notifying learner that he has been enrolled in the course;

**NOTE:** Email of this type contains an attached ICS calendar. The ICS calendar in the *Enrolled Confirmation* notification has the following properties:

- 1) The calendar contains one event with the course offering dates (Access Start Date and Access End Date).
- 2) The time zone of the ICS calendar is taken from the information about time zone set for the Course Offering.

When ICS is sent the system takes course offering time zone and finds appropriate SharePoint time zone from site regional settings by its title. Then it



finds .NET time zone by SharePoint time zone id (SPID) in mapping file located at \TEMPLATE\XML\ElearningForce\TimeZonesMapping.xml.

.NET time zone is taken from system registry entry.

When the time zone on your local computer is different from the time zone of ICS attachment it will adjust to your local time zone in order that you don't miss the event.

- 3) Description of the event in the ICS calendar includes the following information about course: *Title, Short description (including the "Show more details..." link), Category, Duration, Course Type, Location.*

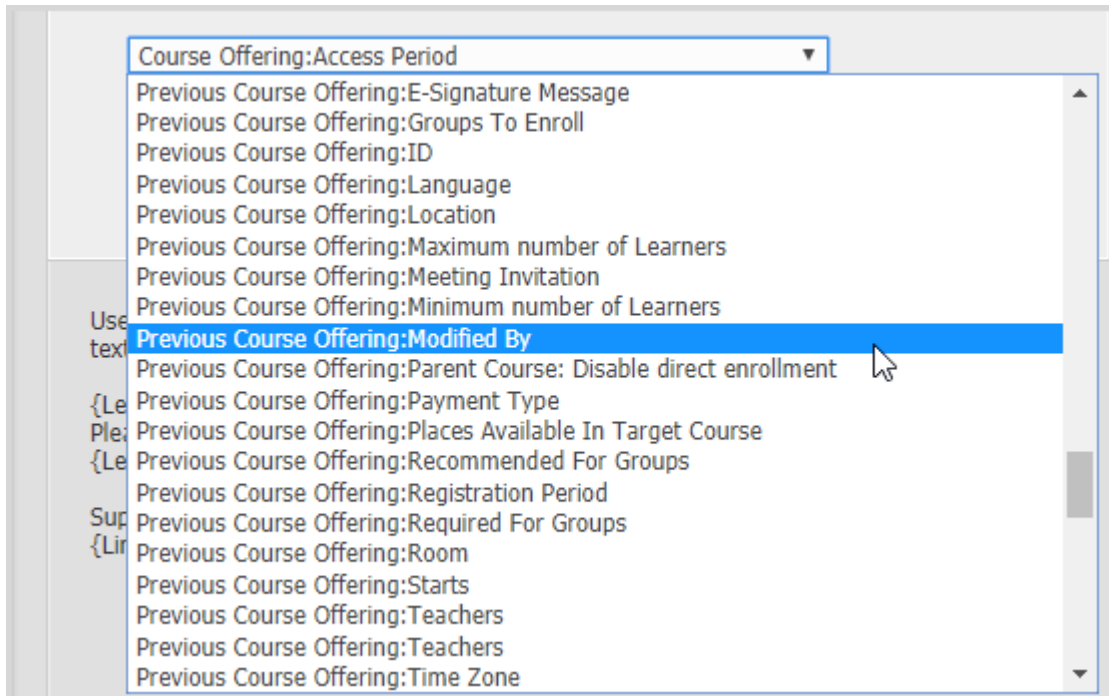
The functionality of ICS attachment becomes available after installation of REM version 5.2 and does not require any feature activation.

- *Material Course Enrollment Confirmation* – email notifying learner that he has been enrolled in the Material course. Is created when Material Course feature is enabled;
- *Course Not Completed Confirmation* – email notifying an enrolled learner that the course is not completed;
- *Course Offering below Minimum required Attendees* – email notifying the administrator about the small amount of users waiting of a course offering;
- *Course Offering Canceled Notification* – email notifying administrator about cancellation of the course offered later;
- *Course Offering Closed* – email notifying administrator about closing of the course offering;
- *Course Offering Teacher Assigned* – email notifying user that he has been assigned as Teacher to the course;

**NOTE:** Email of this type contains an ICS attachment with Course Offering Access Period dates and information about the course. Email notification respects ICS attachment settings set in the enrollment template.

- *Course Offering Teacher Unassigned* – email notifying user that he is no longer assigned as Teacher to the course;
- *Course Registration Approval Request* – email notifying Line Manager about course registration pending approval;
- *Course Registration has been deleted Confirmation* – email notifying an enrolled learner that his registration was deleted;
- *Course Registration Overdue Reminder* – email notifying users specified in the Enrollment Template that the training has passed the due date;
- *Course Start Reminder Notification* – email notifying an enrolled learner and Course Teacher about the course beginning five days before Start Date (or any other number of days depending on the specified in the enrollment template);
- *Course Update Notification* – email notifying learner and Course Teachers about course changes (e.g. if learner's registration has been moved to another course

offering within the same course). You can add Previous Course Offering placeholders to specify information about the course offering from which the registration was moved to the new one:



This email template is also used for the emails sent from Teacher area in Dashboard (or from Courses/Course Offerings lists using ribbon action). {special:Message} token is used to show the content entered by teacher;

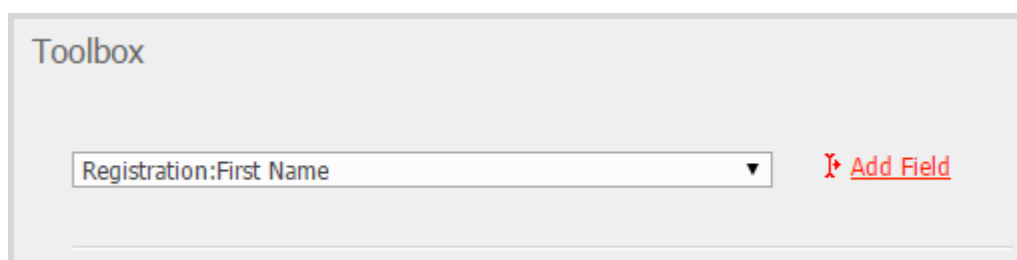
- *Curriculum Certificate Has Expired* – email notifying learner that his curriculum certificate has expired;
- *Curriculum Certificate is Expiring Reminder* – email notifying learner that his curriculum certificate will soon expire;
- *Curriculum Completed Confirmation* – email notifying learner that the curriculum is completed;
- *Curriculum Completion Due Date Reminder Notification* – email notifying learner about curriculum completion due date;
- *Curriculum Enrollment Confirmation* – email notifying learner that he has been enrolled in the curriculum;
- *Deleted User Notification* – email notifying that a user was deleted from the Registrations List and from the course;
- *Learner Cancelled Notification* – email notifying learner and administrator that user's registration has been cancelled;
- *Learner Course Enrollment Confirmation* – administrator will receive an email about learner's enrollment in a course;

- *Line Manager Approval Confirmation* – email notifying that user’s enrollment request has been approved;
- *New User Notification* – email notifying the administrator when anonymous user was registered in system (either when a user enrolls by oneself or is enrolled/added by another user);
- *Reset Password* – email notifying a registered learner about password change;

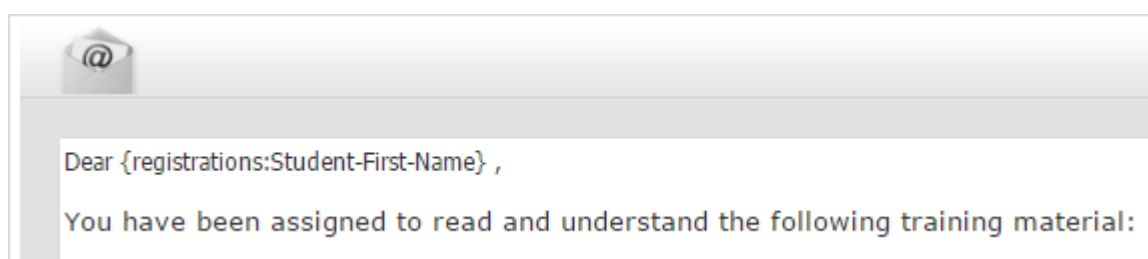
**NOTE:** To enable the Password reset feature, in the configuration file, set *enablePasswordReset* to "true" and *requiresQuestionAndAnswer* to "false".

- *User Credentials Notification* – a learner will receive an email, containing user’s login name and password;
- *Wait List Confirmation* – a learner will receive an email, notifying adding in a waiting list for approval by a Line Manager.

4. Enter the text for the message using the Toolbox on the right of the page:



- In the Toolbox section choose the needed macro (depending on Email Template Type) field from the drop-down list;
- Select the area where you want to add macro and then click Add field button to add this macro to the text editing area:



**NOTE:** For each type of email template there is a set of macros set in the Toolbox, so it is not recommended to type macros manually.

<b>NOTE:</b>	There is a special macro 'Course: Mobile App Link' that allows user to open the course inside the ELEARNINGFORCE LMS Mobile App (if it is installed) or if the App is not installed it will be opened in the browser.
<b>NOTE:</b>	Use special tags if some part of text depends on group of recipients. Text between tags will be included in email only for groups of recipients specified in tags. Supported tags are: {SiteCollectionAdmins}, {Learner}, {Teachers}, {LocalAdministrators}, {LineManagers}, {LMSAdministrators}, {HRResponsible}. If no tagging is applied to email, it will be sent to all selected recipients.
<b>NOTE:</b>	<p>On newly created REMs Dashboard links are added to all email templates except User Credentials Notification, Reset Password, Deleted User Notification, New User Notification, and Change Email templates. In the Approval Reminder, Course Registration Approval Request, Course Offering below Minimum required Attendees, Course Offering Cancelled Notification, Course Offering Closed Notification, and Learner Course Enrollment Confirmation templates Dashboard links are not added to the email templates by default, but can be added to them from the Toolbox. Dashboard links in the email templates are used for an easy access to the needed Dashboard sections directly from the email.</p> <p>The following links can be added:</p> <ol style="list-style-type: none"> <li>1. Dashboard: Homepage Link / {dashboard:home_page_link}</li> <li>2. Dashboard: My Training Overview Link / {dashboard:my_training_overview_link}</li> <li>3. Dashboard: My Competencies Link / {dashboard:my_competencies_link}</li> <li>4. Dashboard: My Training Points Link / {dashboard:my_training_points_link}</li> <li>5. Dashboard: My Action Plan Link / {dashboard:my_action_plan_link}</li> <li>6. Dashboard: My Certificates Link / {dashboard:my_certificates_link}</li> <li>7. Dashboard: My Transcript Link / {dashboard:my_transcript_link}</li> <li>8. Dashboard: Teacher My Courses Link / {dashboard:teacher_my_courses_link}</li> <li>9. Dashboard: Manager My Staff Link / {dashboard:manager_my_staff_link}</li> <li>10. Dashboard: Manager Courses Link / {dashboard:manager_courses_link}</li> <li>11. Dashboard: Manager Competencies Link / {dashboard:manager_competencies_link}</li> <li>12. Dashboard: Manager Training Points Link / {dashboard:manager_training_points_link}</li> <li>13. Dashboard: Manager Action Plan Link / {dashboard:manager_action_plan_link}</li> <li>14. Dashboard: Manager Certificates Link / {dashboard:manager_certificates_link}</li> <li>15. Dashboard: Manager Reporting Center Link / {dashboard:manager_reporting_center_link}</li> </ol>

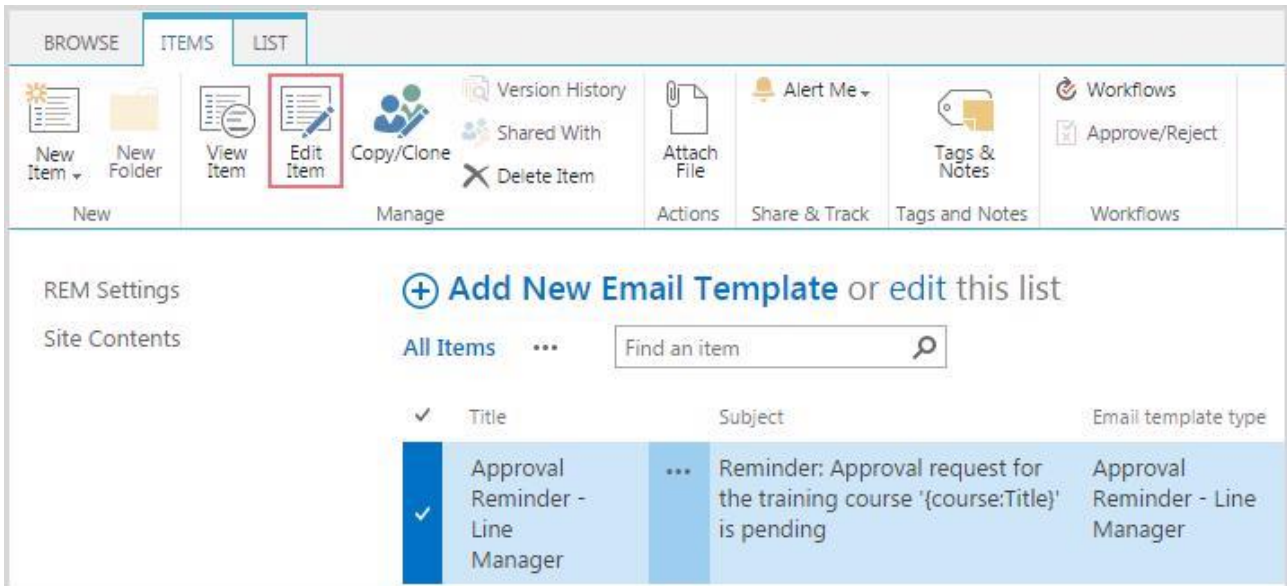
5. Click Save to save the changes and finish creating the email template.

#### 4.1.3.2 Editing Email Template

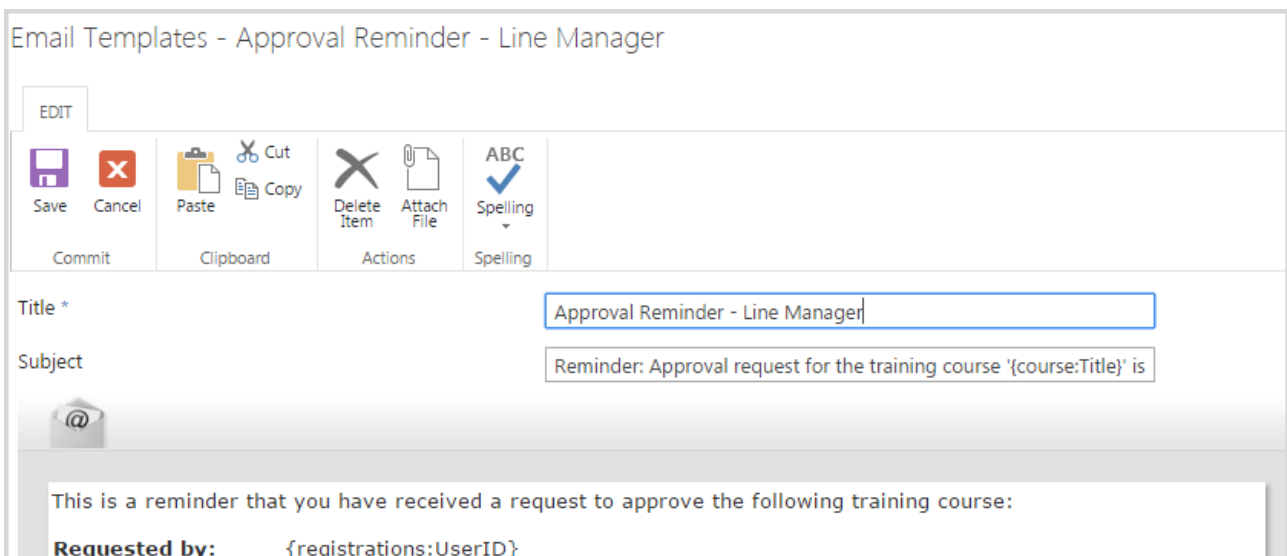
To change the content of the existing email message, you can either [overwrite](#) it or edit.

To enter the editing mode, do one of the following:

1. In the email templates list, check the box against the needed template and click Edit Item on the ribbon menu:



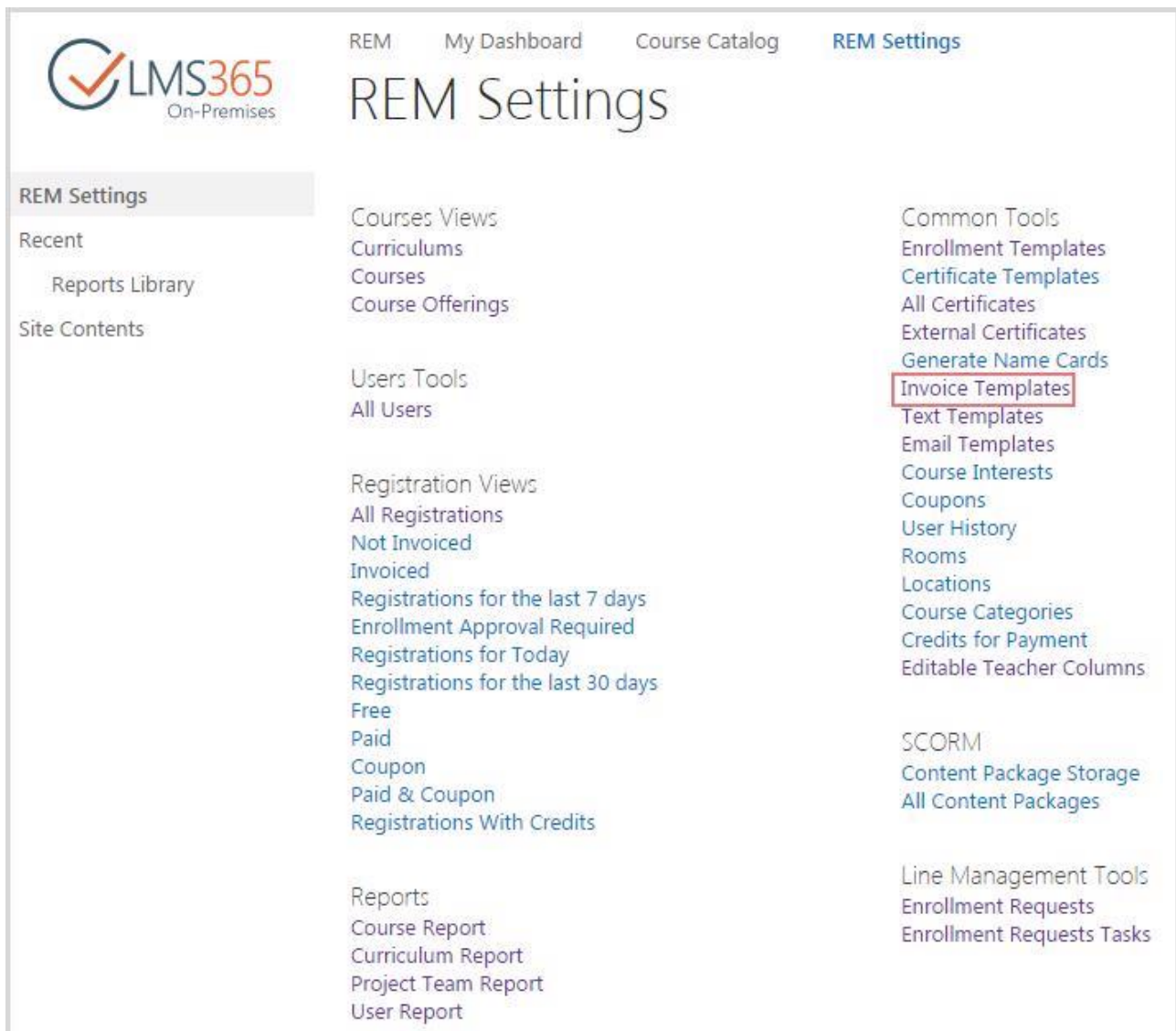
2. Make all necessary changes in the open form:



3. Click Save to save the changes. Click Cancel to discard them.

#### 4.1.4 Invoice Template Management

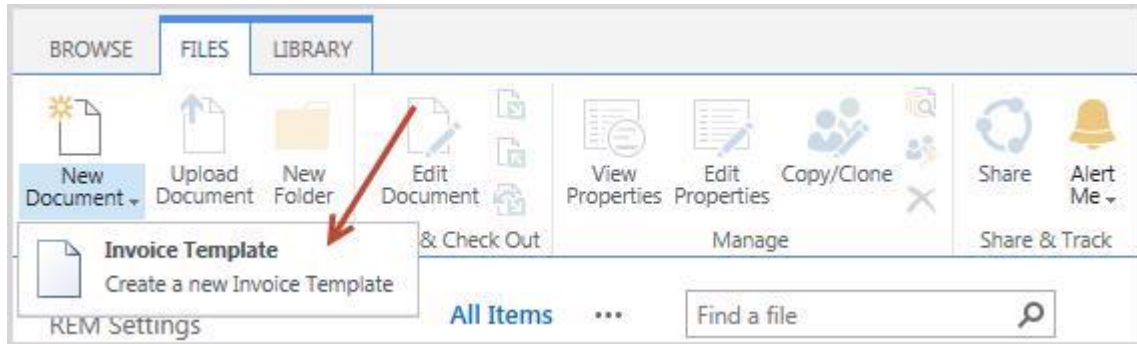
REM has an Invoice Template tool used to create invoice templates in PDF format containing information about the course price and accompanying information:



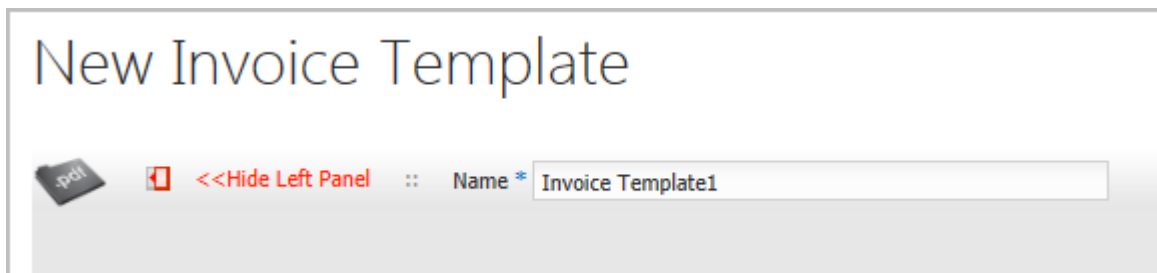
#### 4.1.4.1 *Creating Invoice Template*

To create an Invoice Template, do the following:

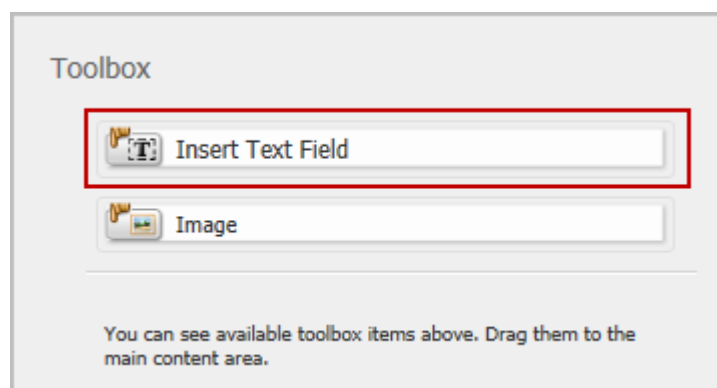
1. Click Invoice Templates on REM Settings page. You will be redirected to the Invoice Templates list;
2. On the toolbar click Files > New Document and select Invoice Template:



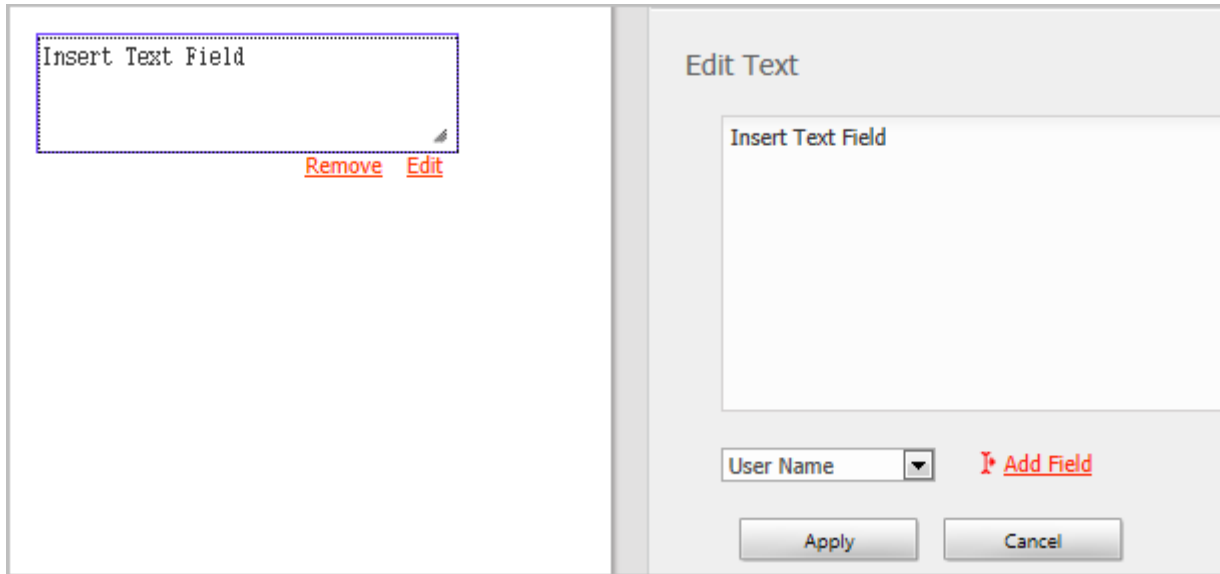
3. On the open form type the template name:



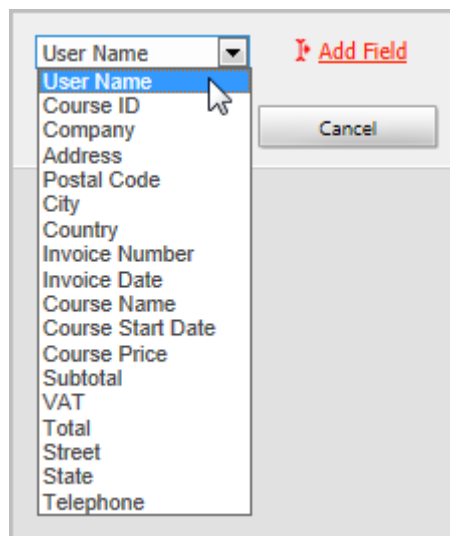
4. Add the text for the template using the text Toolbox item on the right of the page:



- a) Place the text Toolbox to any space of the template page using drag-and-drop operation;
- b) Click Edit to display the field for adding the text:

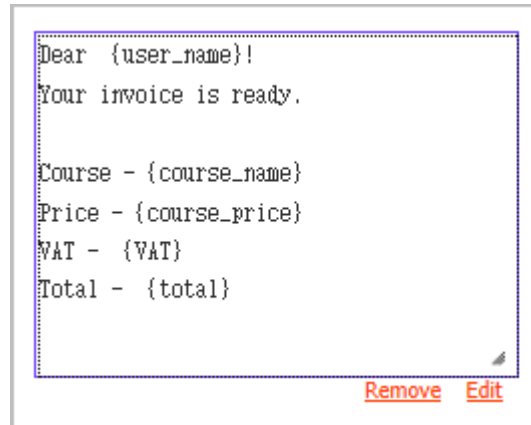


- c) In the open field type the text;
- d) If needed, add macros from the drop-down list: select a macro and click ([Add Field](#)); their values will be generated from the data that a user entered in the Enrollment Form:

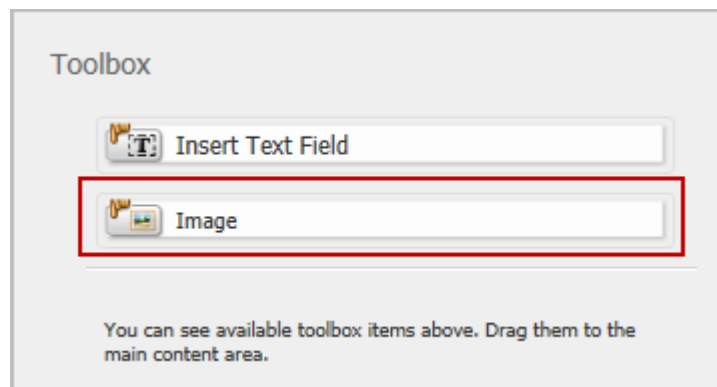


- e) Click Apply to add the text to the template. It will appear in the toolbox on the left:

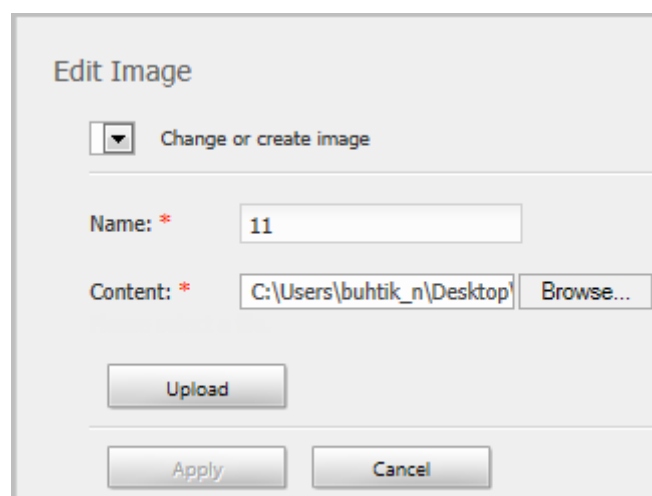




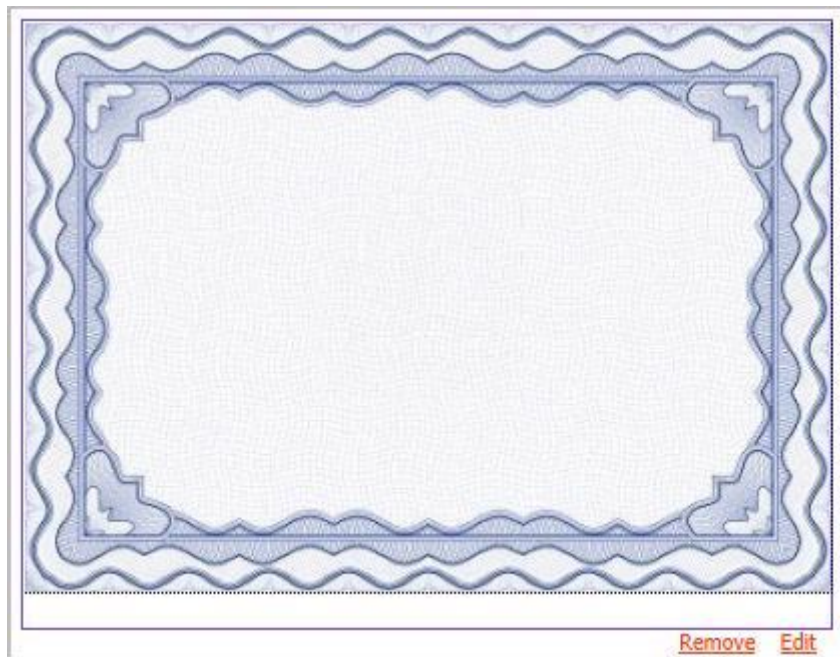
- f) Expand the frame manually to make all the fields fit it.
6. Add the image (e.g. university logo) for the template using the image **Toolbox** item on the right of the page:



- a) Place the image Toolbox to any space of the template page using drag-and-drop operation;
- b) Click Edit to display the fields for adding images:



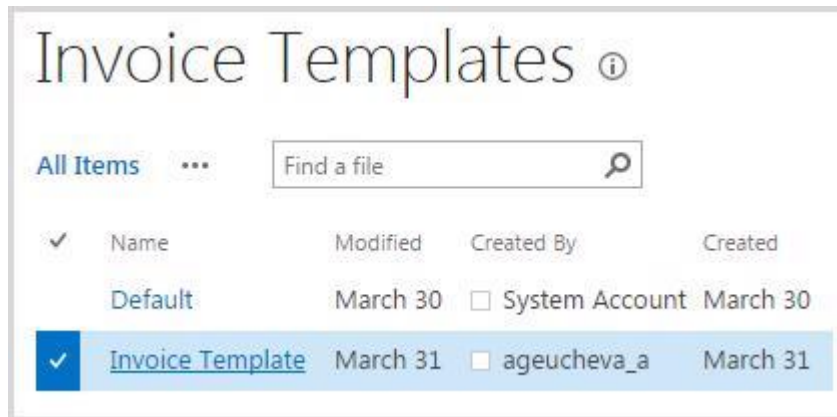
- c) If you already have uploaded images and want to use one of them, select the image from the drop-down list. If not, continue with *step d*);
- d) To upload the new image, type its name in the corresponding field, and then click Browse to select the picture from your local computer. Click Upload. The image name will appear in the drop-down list;
- e) Click Apply to add the image to the template. It will appear in the toolbox on the left:



- 7. Click Save in the lower-right (or upper-left) corner of the page to finish creating the template.

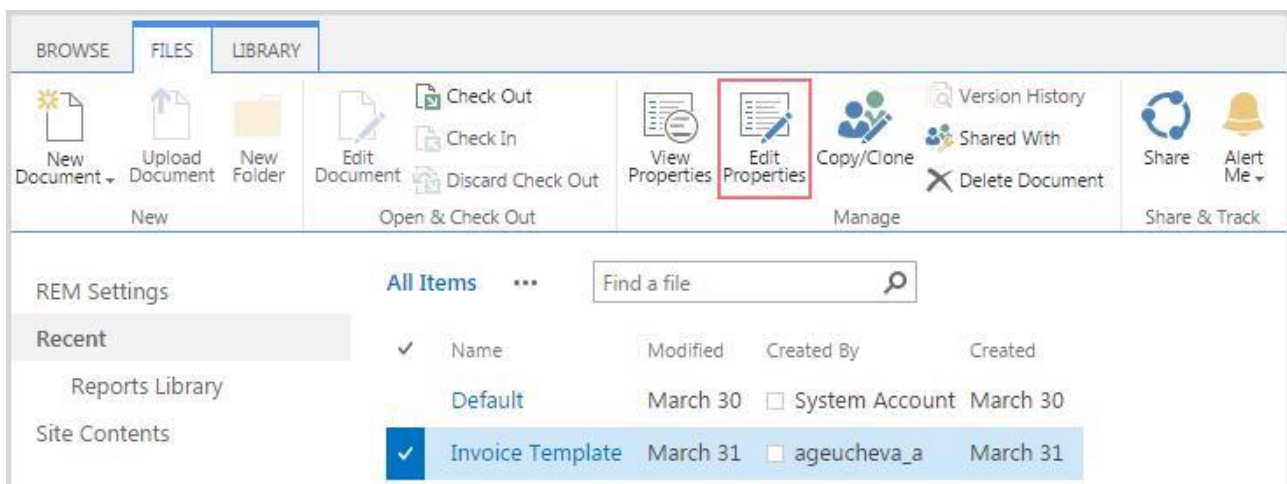
#### 4.1.4.2 Viewing and Editing Invoice Template

Invoice templates can be viewed in PDF-format. Open the list of templates, and click the name of the one you want to view:



To edit a template, do the following:

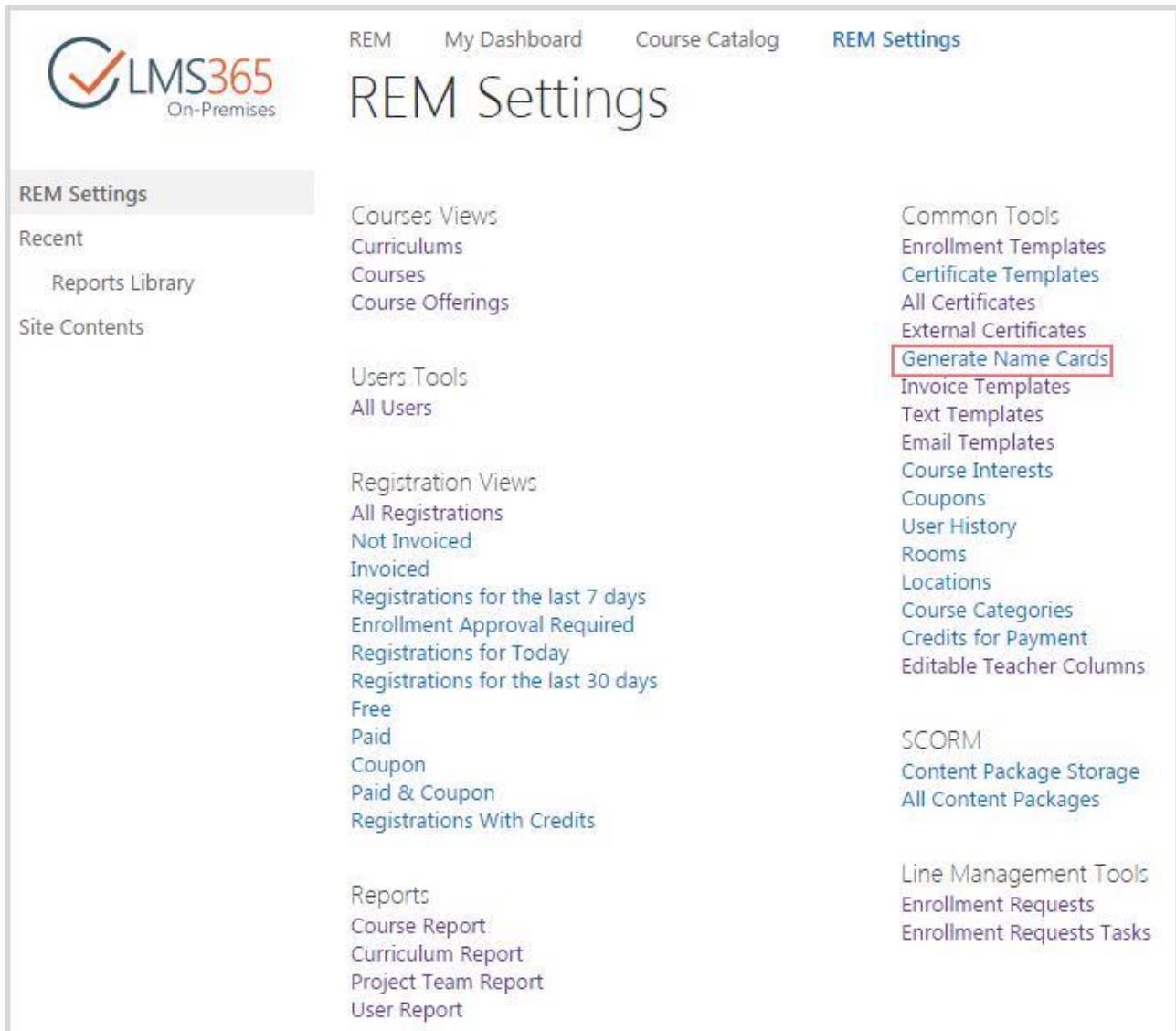
1. Open the Invoice Templates list;
2. Select the checkbox of the needed template;
3. On the ribbon menu, click Files > Edit Properties:



4. Make the necessary changes and click Save.

## 4.1.5 Name Cards Management

The Generate Name Cards tool can be used for creation of badges and the A4 table name cards either for a course teacher or for a learner:

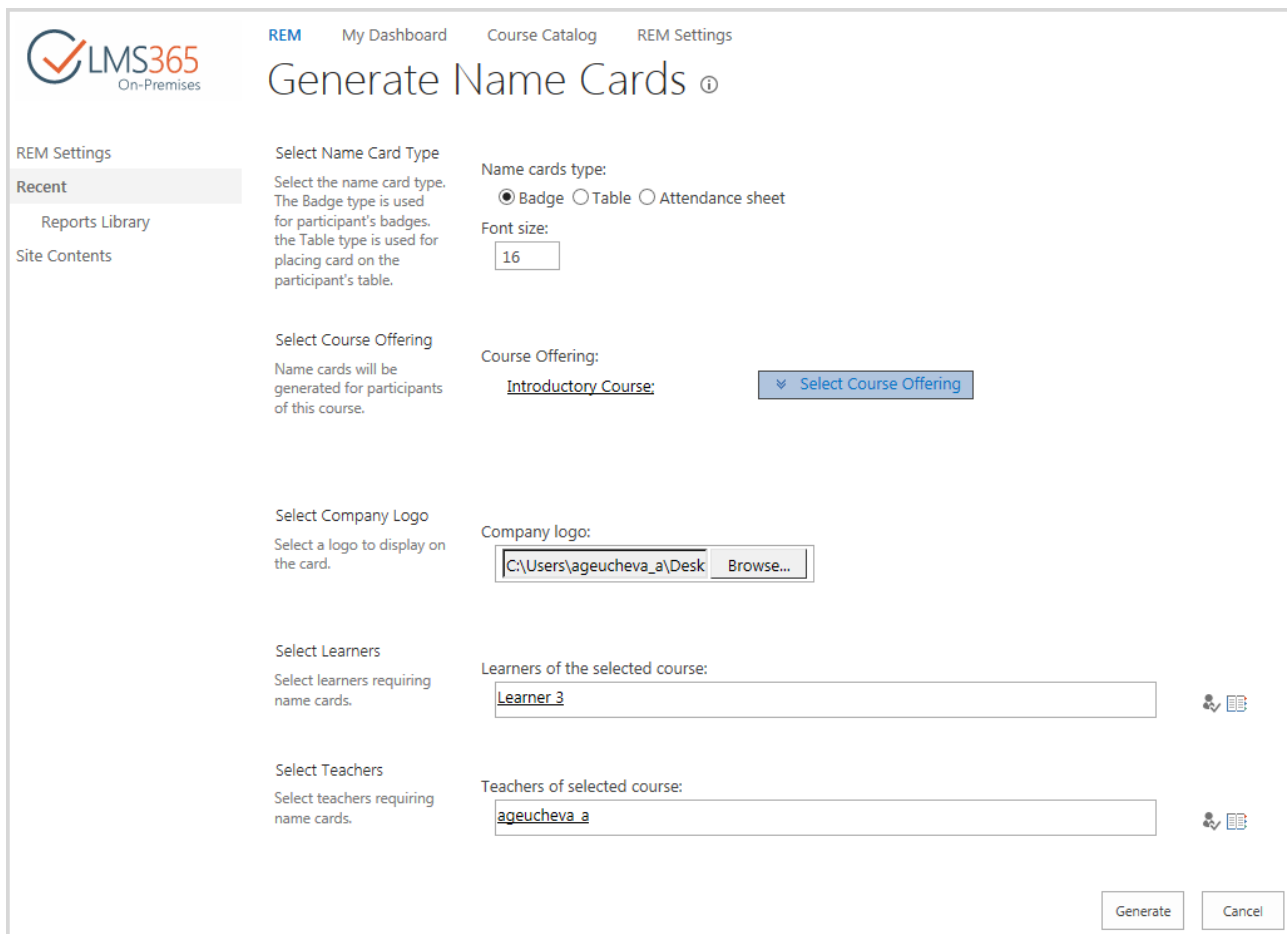


The screenshot shows the LMS365 On-Premises interface. At the top, there are navigation links: REM, My Dashboard, Course Catalog, and REM Settings. The main heading is 'REM Settings'. On the left, there is a sidebar with 'REM Settings' selected, and sub-sections for 'Recent', 'Reports Library', and 'Site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

- Left Column:** Courses Views, Curriculums, Courses, Course Offerings, 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.
- Middle Column:** Common Tools, Enrollment Templates, Certificate Templates, All Certificates, External Certificates, **Generate Name Cards** (highlighted), Invoice Templates, Text Templates, Email Templates, Course Interests, Coupons, User History, Rooms, Locations, Course Categories, Credits for Payment, Editable Teacher Columns.
- Right Column:** SCORM, Content Package Storage, All Content Packages, Line Management Tools, Enrollment Requests, Enrollment Requests Tasks.

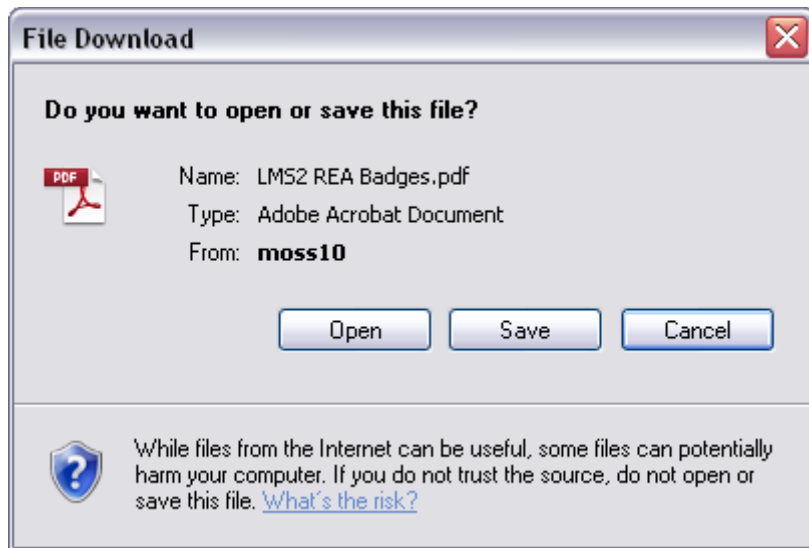
To create a Badge or Name Card, do the following:

1. Click the Generate Name Cards link on the REM Settings page;
2. Complete the open form:

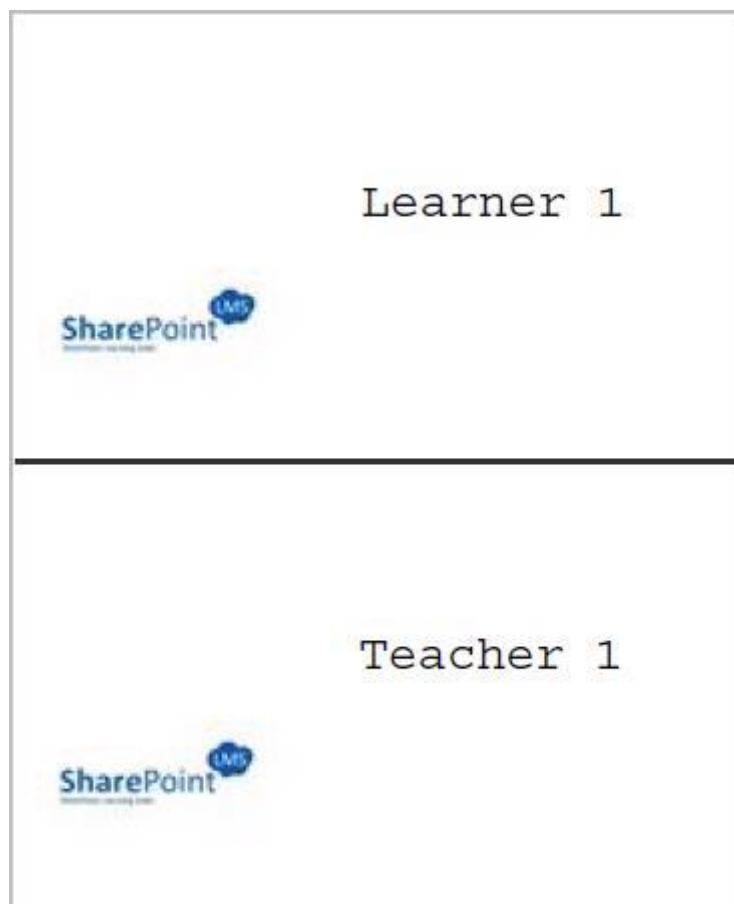


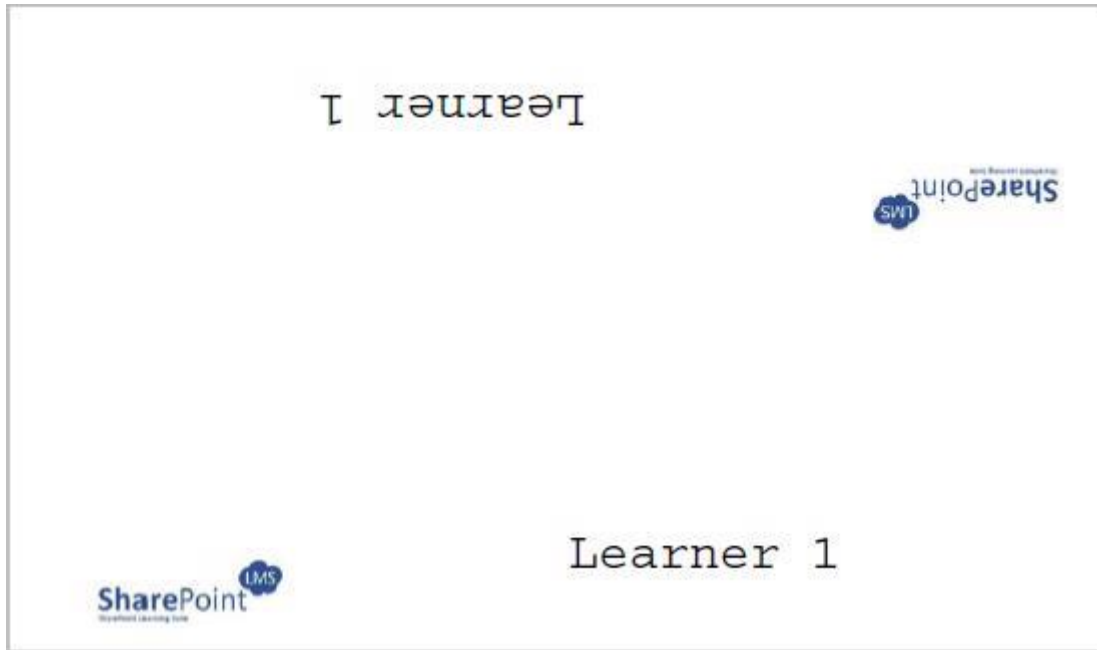
- *Name cards type* – select the option depending whether you want to print a badge, table or Attendance sheet name card;
- *Font size* – select the appropriate text size for the name to be written on badges/table cards; the value of this field should be in the 1-50 range;
- *Select Course Offering* – select the appropriate course offering;
- *Company logo* – click Browse to select an image (e.g. you company logo); the format should be .PNG, .JPG, or .BMP;
- *Select Learners* – select the learners, if you want to print learner’s badges/table cards;
- *Select Teachers* – select the course offering teachers, if you want to print teacher’s badges/table cards.

3. Click Generate. The Browser's File Download dialog box will open:




4. Click Open to view the result in a *PDF*-file. Click Save to save the file. The badges/table cards/attendance sheets will look similar to the following:



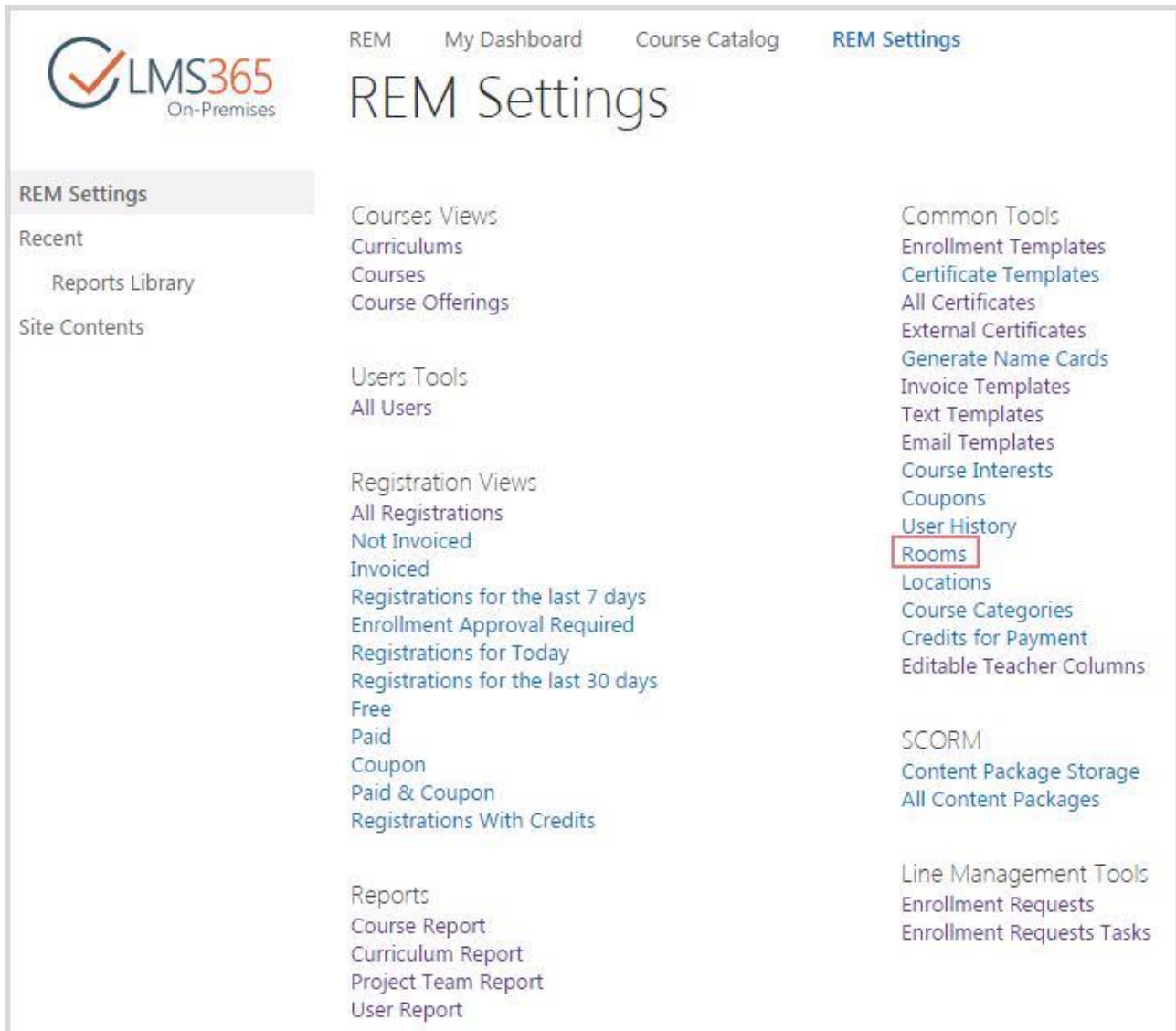


**NOTE:** The content of table card is duplicated in reversed way in order to fold a sheet of paper double and place it on the table.

	Course 1
Course Title	
Training Location	
Trainer	Signature      Phone
Teacher 1	
Attendee	Signature
First Last	
Instructions on what to do with the attendance sheet once completed.	

## 4.1.6 Rooms Management

When you want to create a [Course Offering](#) first you need to define the rooms where the classes will be held. The same rooms can be used for different course offerings:



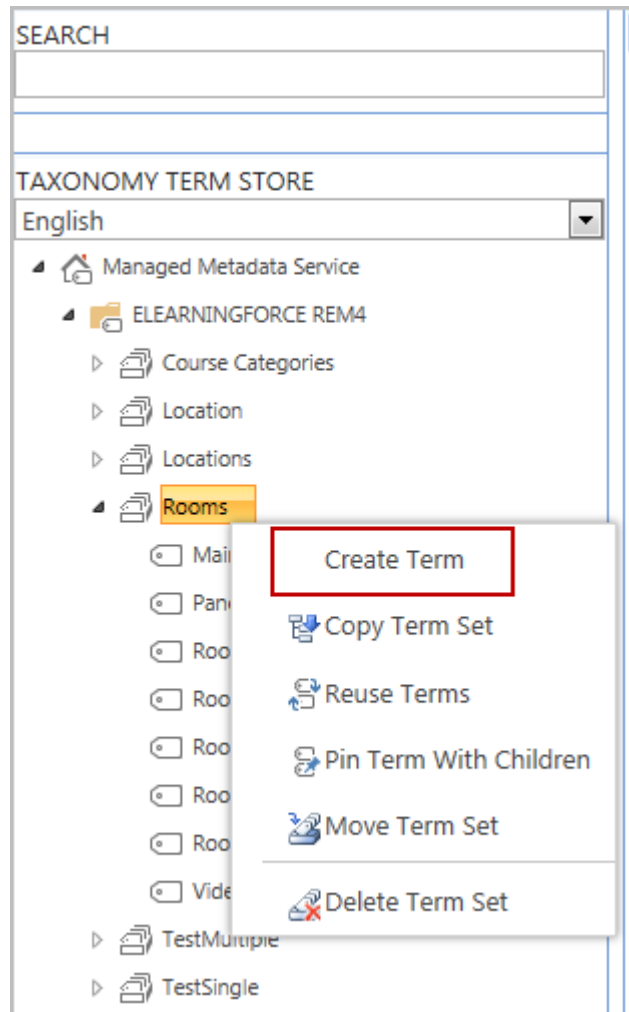
**NOTE:** Only user with farm administrator rights who has permissions in the Managed Metadata Service, can create and manage Metadata Rooms. To verify the permissions, go to Central Administration>Application Management > Manage Service Applications>Managed Metadata Service> Term Store Administrators and check that your user has administrator rights here.

To add a new Room, do the following:

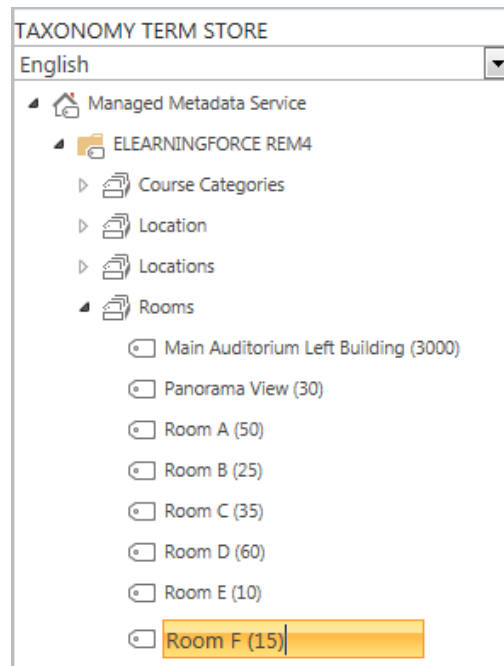
1. Go to REM Settings > Rooms section;



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

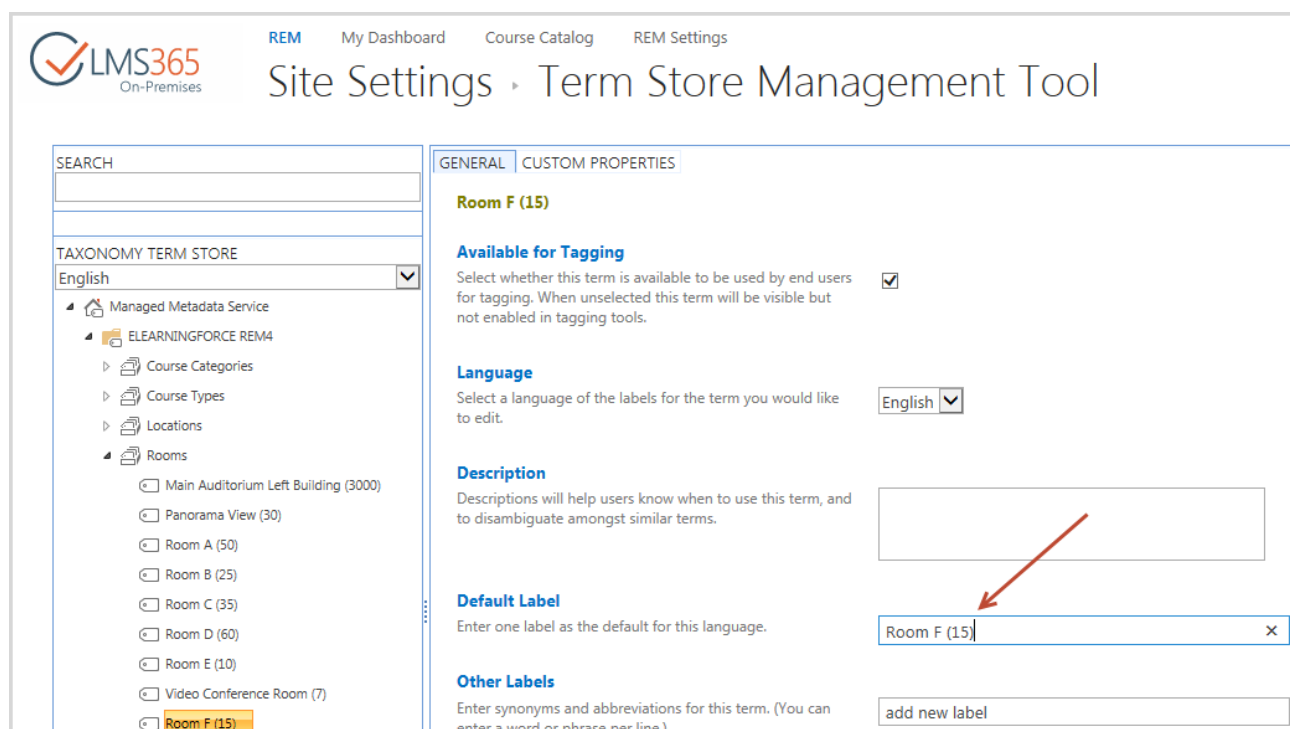


3. Enter Title for the new Room:



The new Room will be available in all REM sites within the farm.

To edit an existing Location, double-click on its name or select a Location and edit the Default Label:



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

**TAXONOMY TERM STORE**

English ▼

- Managed Metadata Service
  - ELEARNINGFORCE REM4
    - Course Categories
    - Location
    - Locations
    - Rooms
      - Main Auditorium Left Building (3000)**
      - Panorama View (30)
      - Room A (50)
      - Room B (25)
      - Room C (35)
      - Room D (60)
      - Room E (10)
      - Video Conference Room (7)
    - TestMultiple
    - TestSingle
  - People
  - Search Dictionaries

**Available for Tagging**

Select whether this term is available to be used by end users for tagging. When unselected this term will be visible but not enabled in tagging tools.

**Language**

Select a language of the labels for the term you would like to edit.

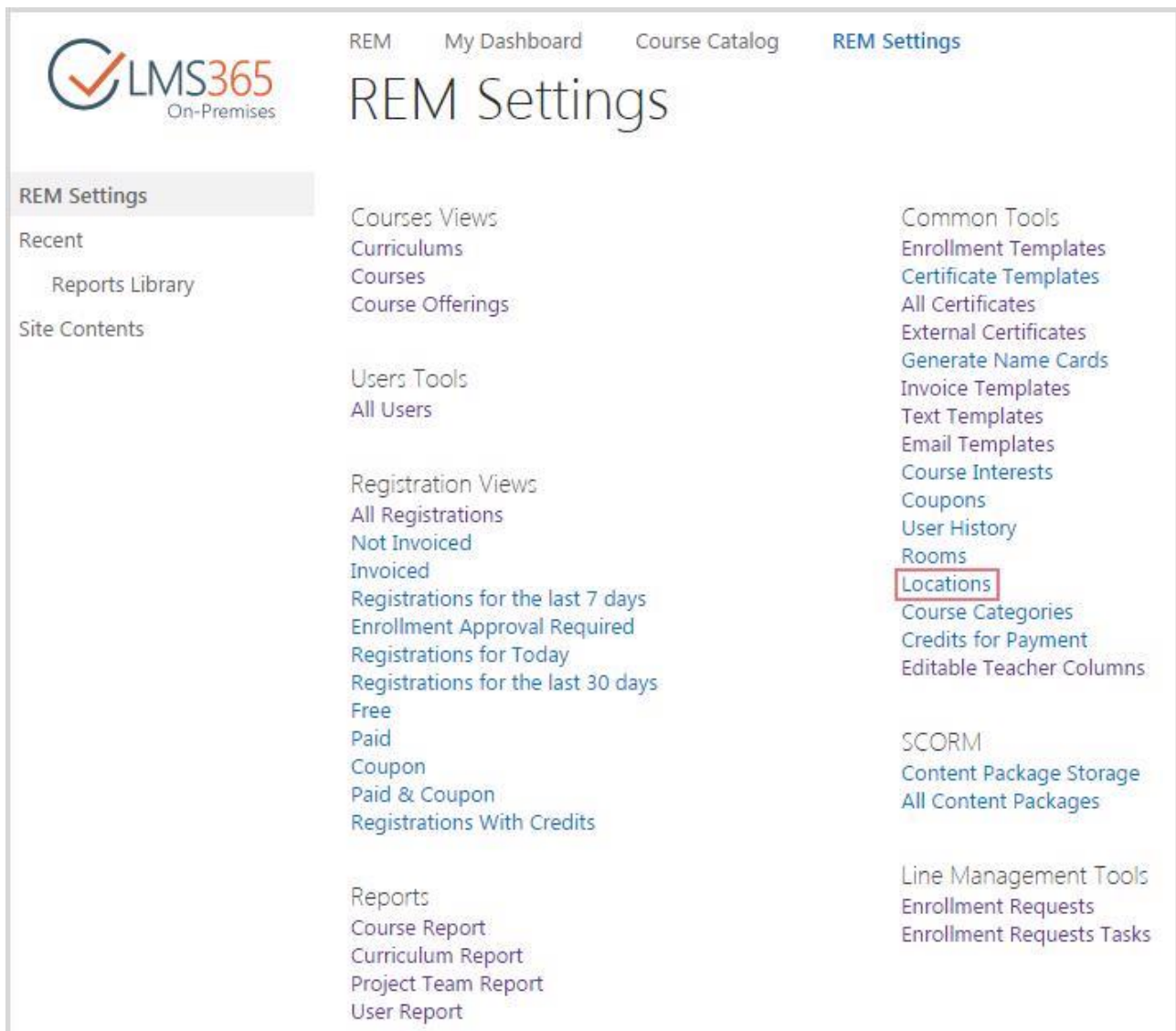
**Description**

Descriptions will help users know when to use this term, and...

- Create Term
- Copy Term
- Reuse Terms
- Pin Term With Children
- Merge Terms
- Deprecate Term
- Move Term
- Delete Term

### 4.1.7 Locations Management

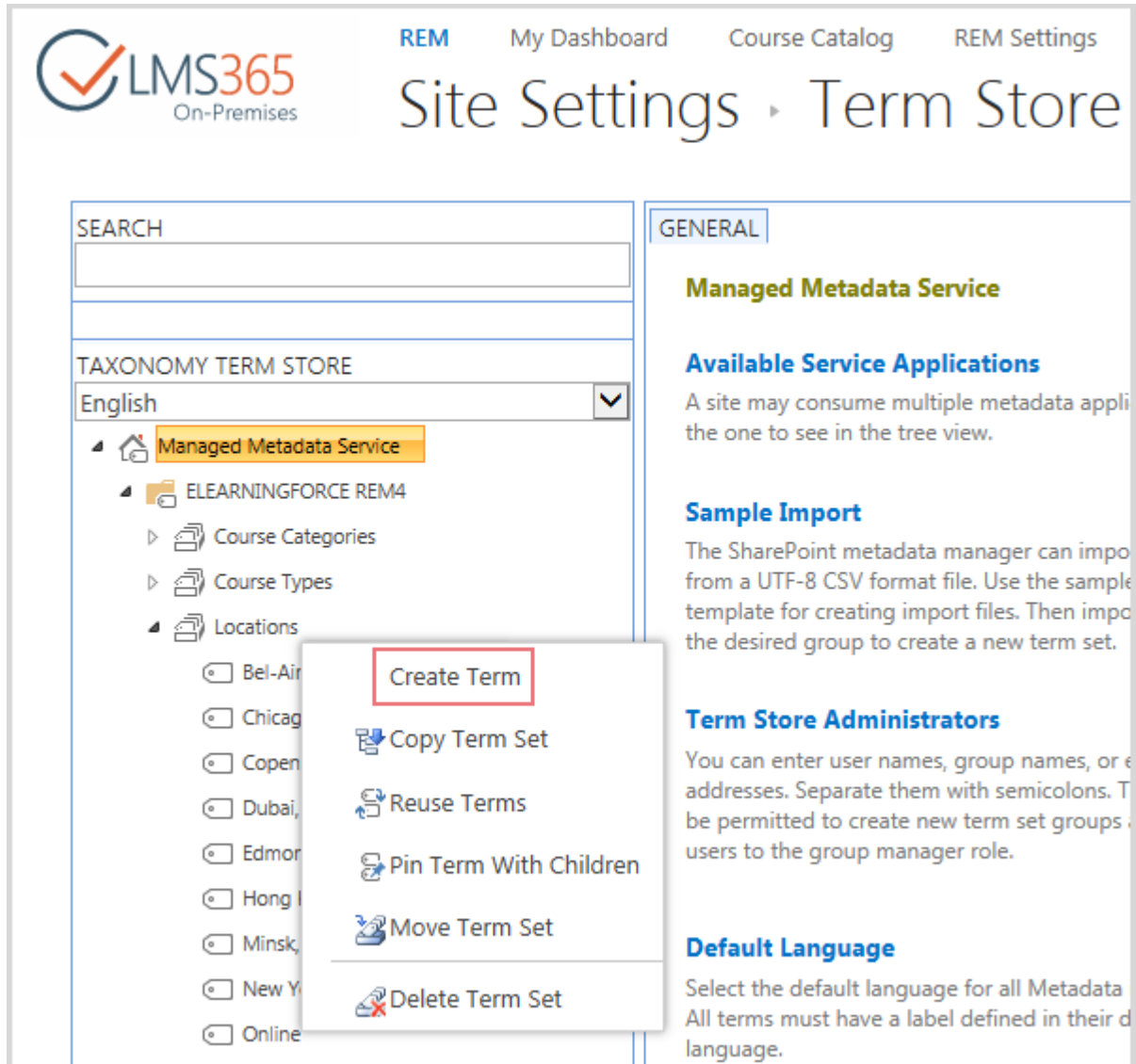
The Locations tool helps users to define the geographical position of the Course to be held. This information must be added to the [Course Offerings](#):



**NOTE:** Only user with farm administrator rights who has permissions in the Managed Metadata Service, can create and manage Metadata Locations. To verify the permissions, go to Central Administration>Application Management > Manage Service Applications>Manage Metadata Service> Term Store Administrators and check that your user has administrator rights here.

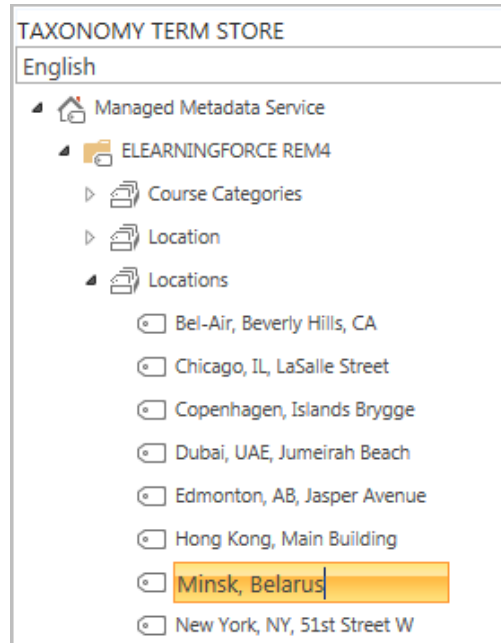
To add a new Location, do the following:

1. Go to REM Settings > Locations section;
2. In the opened Term Store Management Tool select Managed Metadata Service > ELEARNINGFORCE REM4 > Locations > Create Term:



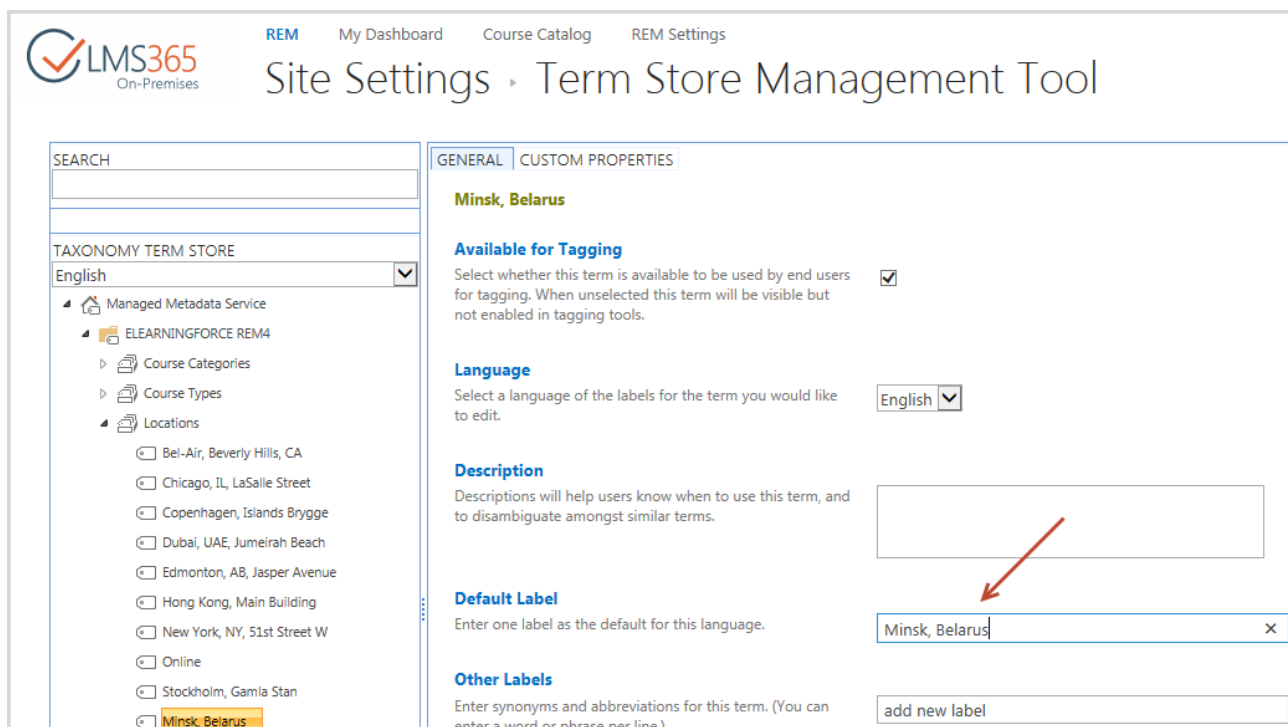
The screenshot displays the 'Site Settings - Term Store' page in LMS365. At the top, there are navigation links for 'REM', 'My Dashboard', 'Course Catalog', and 'REM Settings'. The main header includes the LMS365 logo and the page title 'Site Settings - Term Store'. On the left, a 'SEARCH' bar is visible above a 'TAXONOMY TERM STORE' section. This section is set to 'English' and shows a tree view under 'Managed Metadata Service' with sub-categories like 'ELEARNINGFORCE REM4', 'Course Categories', 'Course Types', and 'Locations'. A context menu is open over the 'Locations' category, listing actions such as 'Create Term', 'Copy Term Set', 'Reuse Terms', 'Pin Term With Children', 'Move Term Set', and 'Delete Term Set'. The 'Create Term' option is highlighted with a red box. On the right, the 'GENERAL' settings pane is visible, containing sections for 'Managed Metadata Service', 'Available Service Applications', 'Sample Import', 'Term Store Administrators', and 'Default Language'.

3. Enter Title for the new Location:



The new Location will be available in all REM sites within the farm.

To edit an existing Location, double-click on its name or select a Location and edit the Default Label:



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

**TAXONOMY TERM STORE**

English

- Managed Metadata Service
  - ELEARNINGFORCE REM4
    - Course Categories
    - Location
    - Locations
      - Bel-Air, Beverly Hills, CA
      - Chicago, IL, LaSalle Street
      - Copenhagen, Islands Brygge
      - Dubai, UAE, Jumeirah Beach
      - Edmonton, AB, Jasper Avenue
      - Hong Kong, Main Building
      - Minsk, Belarus
      - New York, NY,
      - Online
      - Stockholm, Ga
    - Rooms
    - TestMultiple
    - TestSingle
  - People
  - Search Dictionaries
- System

**Available for Tagging**

Select whether this term is available to be used by end users for tagging. When unselected this term will be visible but not enabled in tagging tools.

**Language**

Select a language of the labels for the term you would like to edit.

**Description**

Descriptions will help users know when to use this term, and to disambiguate amongst similar terms.

**Default Label**

Enter one label as the default for this language.

**Other Labels**

Enter synonyms and abbreviations for this term. (You can enter a word or phrase per line.)

**Number Of**

Term Set Name	Term Set Description	Pa
Locations		L

**Unique Identifier**

Delete Term -4651-b190-320ec725eb75

Create Term

- Copy Term
- Reuse Terms
- Pin Term With Children
- Merge Terms
- Deprecate Term
- Move Term
- Delete Term

### 4.1.8 Credits for Payment Management

The Credits for Payment tools helps users to take a loan to pay for learners to be enrolled to courses. The third party pays a sum for covering learners' tuition. After paying this person gets a credit code that he/she will grant to those learners, whose tuition will be covered with this Credit. The administrator can add the Credit web part to the needed Enrollment Template so when enrolling to the needed course learners may enter the credit code:

### Enroll in - Course1

---

#### User Information

User Information  Add Multiple Users

▶ Create New Users

Login Name:\*

Email: \*



First Name: \*

Last Name: \*

Login Name	First Name	Last Name	Email
------------	------------	-----------	-------

▶ Select existing users to enroll

Teacher 1:

#### Payment


Payment Type

For Members 50.00 USD

For Non-Members 50.00 USD

For others 50.00 USD

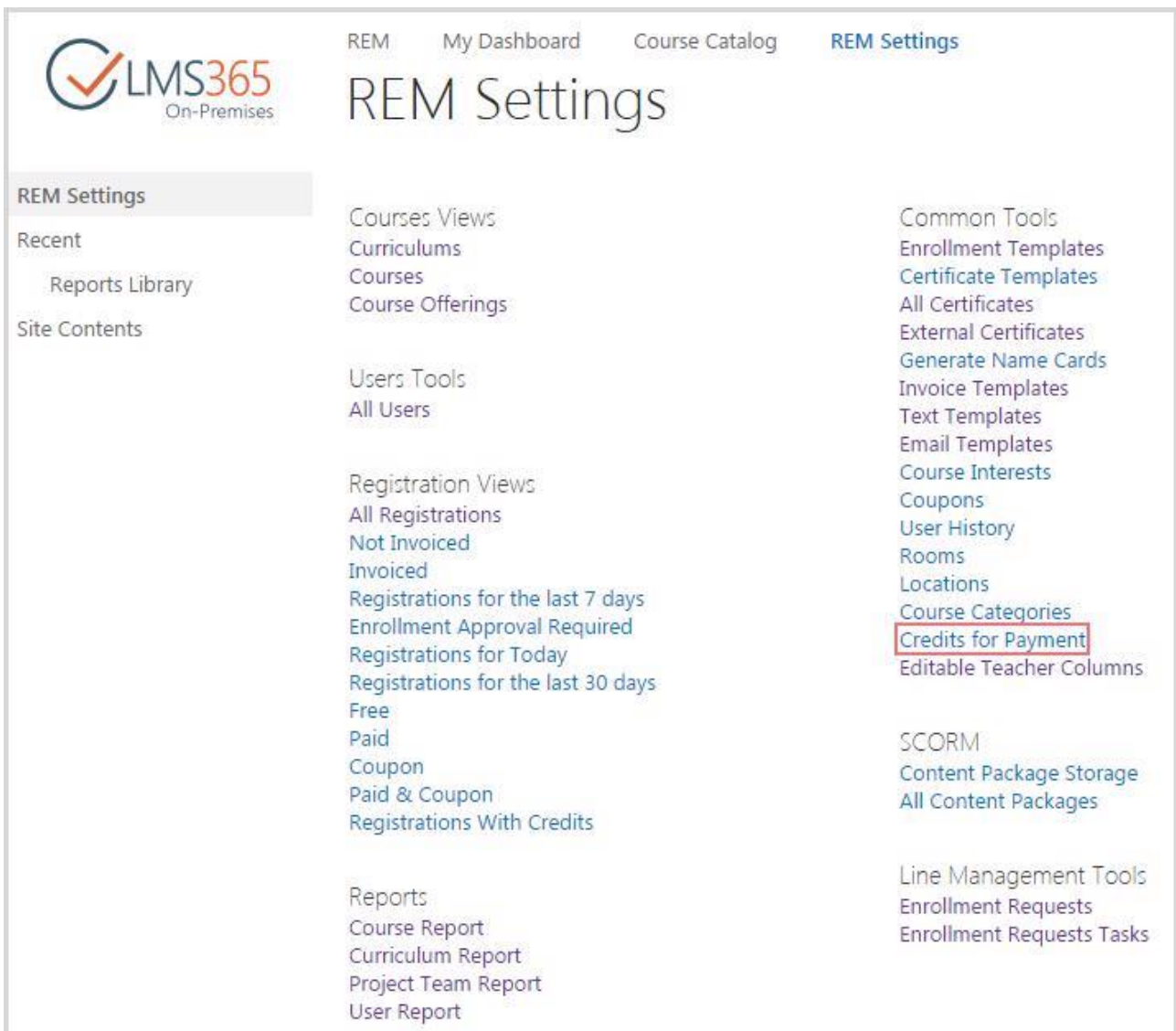
Credit



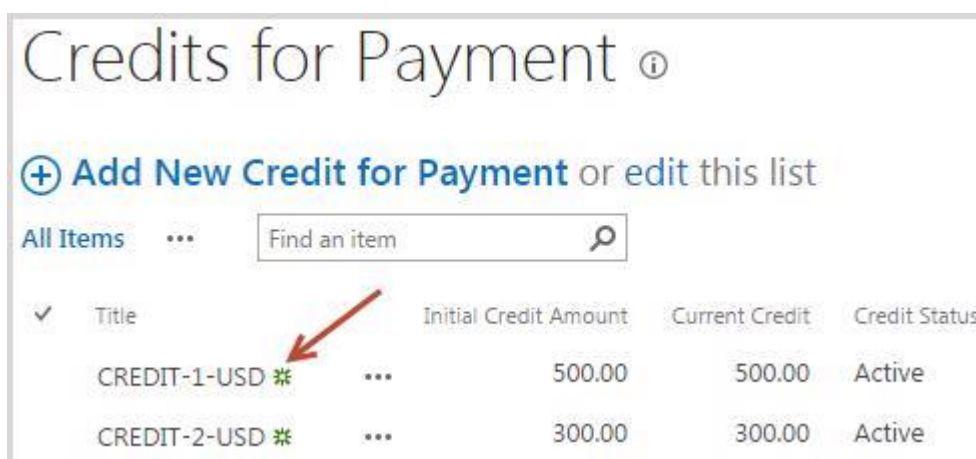
#### Invoice Address

You can access the Credits for Payment section on the REM Settings page:





Credit code is the title of the item in Credits for payment list, i.e CREDIT-1-USD, CREDIT-2-USD on following screenshot:



✓	Title	Initial Credit Amount	Current Credit	Credit Status
	CREDIT-1-USD	500.00	500.00	Active
	CREDIT-2-USD	300.00	300.00	Active

Therefore, user can use credit for payments functionality if administrator fulfills the following:


- creates an [Invoice Template](#);
- creates an [Enrollment Template](#) with Payment Type "Paid";
- specifies Price for Members/Non Members/Other users;
- adds [Credit web part](#) to the Enrollment template.

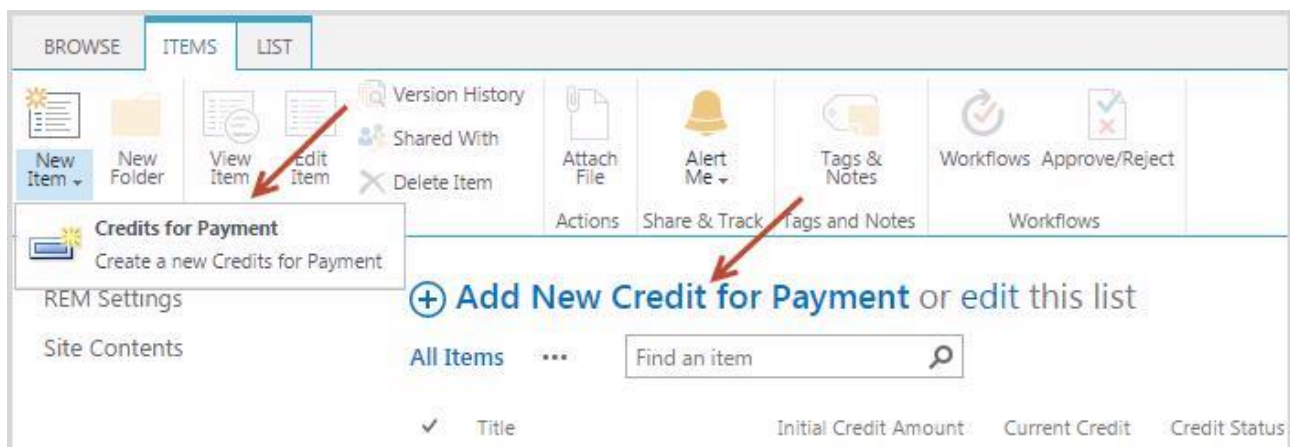
Credits for payment are used by the following flow:

Administrator creates a paid course offering. Learner sees the "Credit" field when enrolling to course and enters the credit code into it. Administrator or another person should provide learner with the credit code so the learner could use it. If the entered credit code is correct then user is enrolled (or set "Waiting for Approval" status depending on enrollment settings) to the course. Invoice is sent to the email address specified in Invoice Address part of the enrollment form automatically. Sum of price for the course is automatically subtracted from "Initial Credit Amount". The remaining sum is displayed in the "Current Credit" field.

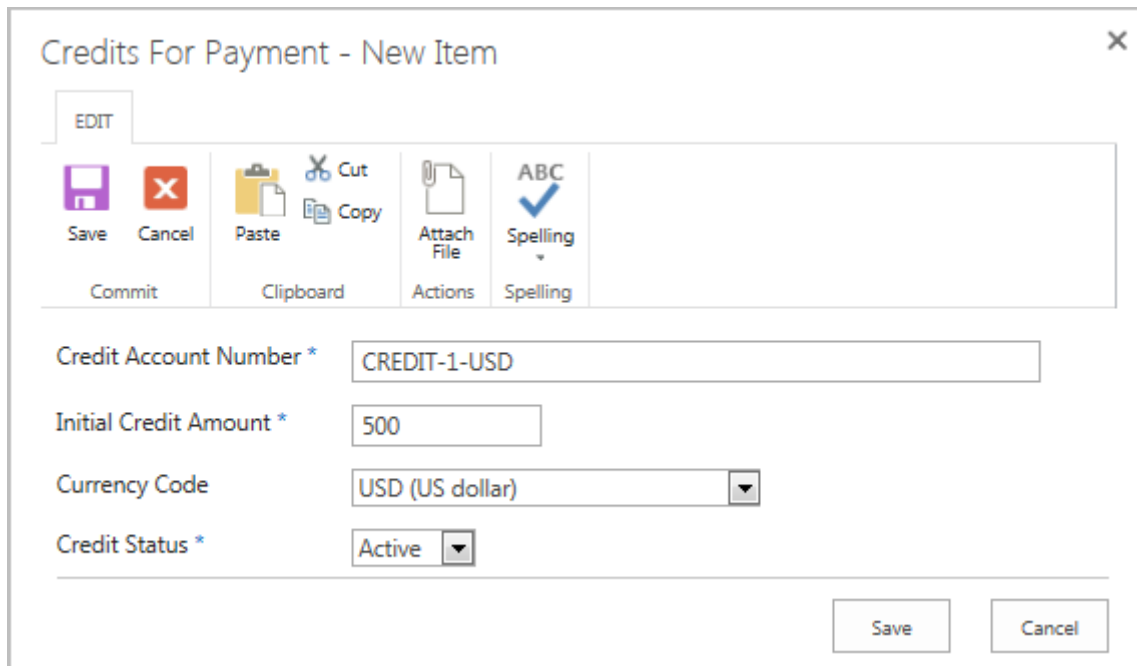
#### 4.1.8.1 *Creating Credits for Payment*

To add a new Credit, do the following:

1. Go to the Credits for Payment section;
2. On the ribbon menu go to Items > New Item > Credits for Payment or click Add New Credit for Payment button :



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



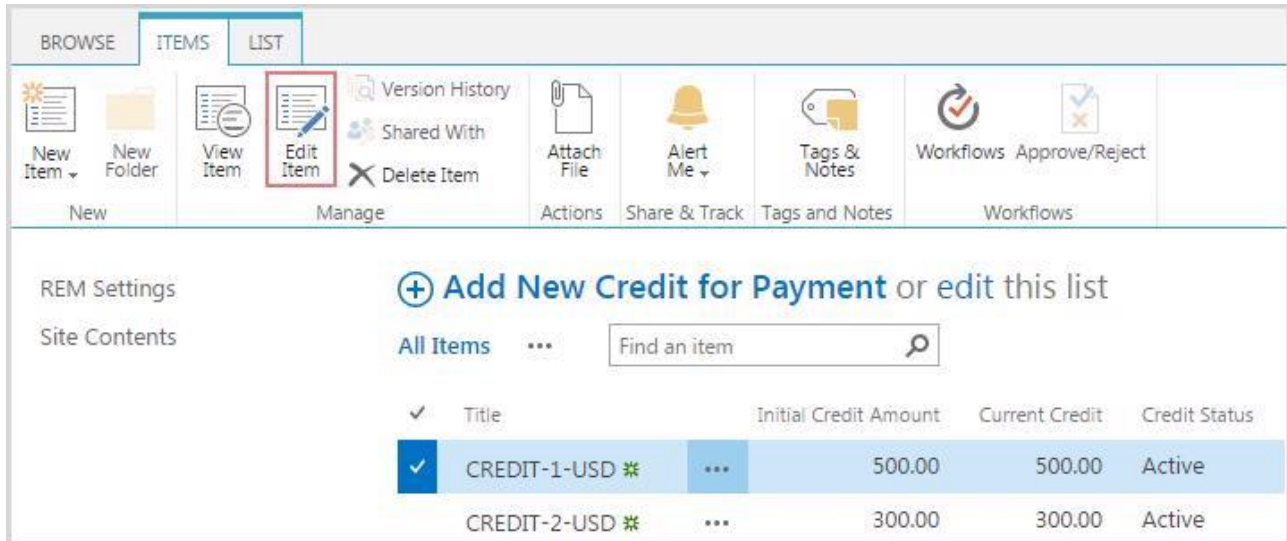
- *Credit Account Number* – the system will generate this title automatically depending on index number and title;
- *Initial Credit Amount* – type the credit sum;
- *Currency Code* – specify the type of currency;
- *Credit Status* – activate or suspend the credit (in case the credit was open but the payment transaction still has not come).

4. Click Save to save the changes and add the new Location.

#### 4.1.8.2 *Editing Credits for Payment*

To edit a Credit, do the following:

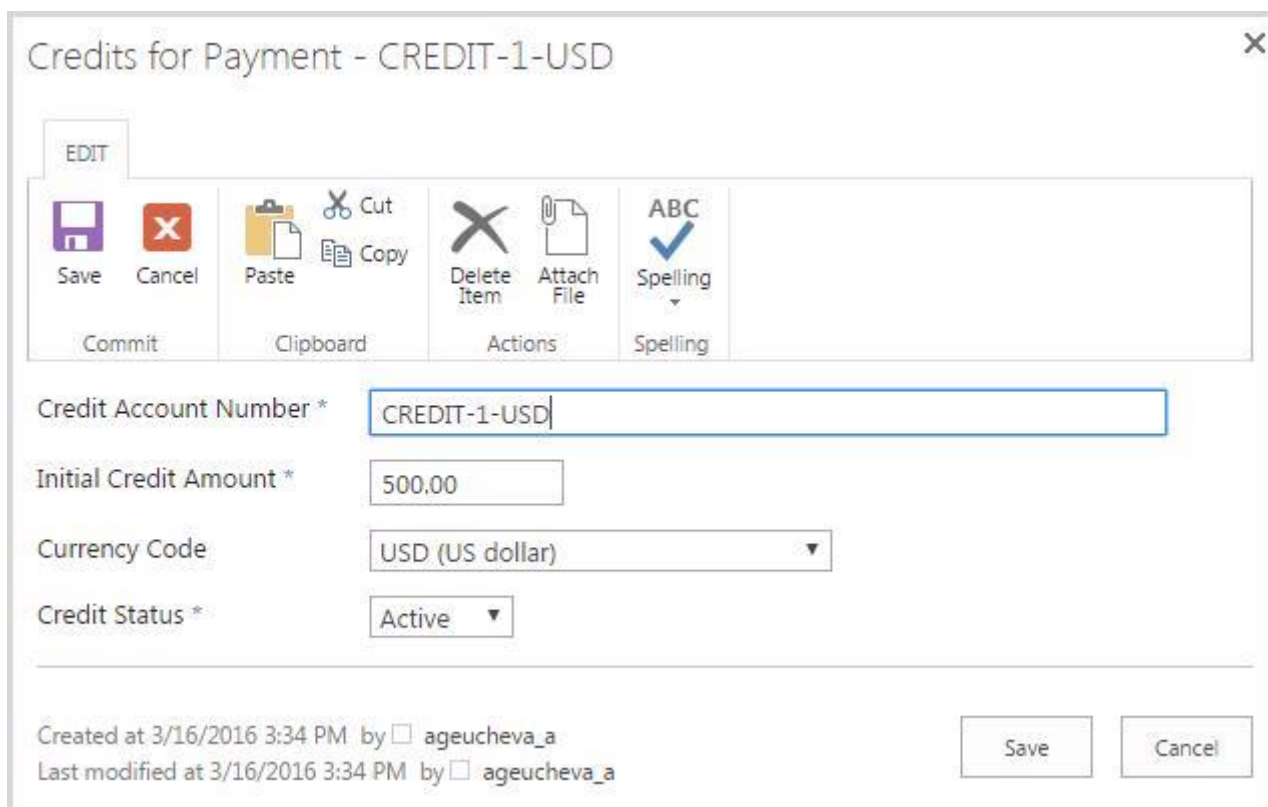
1. Go to the Credits for Payment section;
2. Check the box against the needed credit and click Edit Item on the ribbon menu:



The screenshot shows the 'ITEMS' tab in the LMS365 interface. The top navigation bar includes 'BROWSE', 'ITEMS', and 'LIST'. Below this is a ribbon with various actions: 'New' (New Item, New Folder), 'Manage' (View Item, Edit Item, Version History, Shared With, Delete Item), 'Actions' (Attach File), 'Share & Track' (Alert Me), 'Tags and Notes' (Tags & Notes), and 'Workflows' (Workflows, Approve/Reject). The main content area displays 'REM Settings' and 'Site Contents'. A prominent blue button says '+ Add New Credit for Payment or edit this list'. Below this is a search bar and a table of items:

✓	Title	Initial Credit Amount	Current Credit	Credit Status
✓	CREDIT-1-USD *	500.00	500.00	Active
	CREDIT-2-USD *	300.00	300.00	Active

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



The screenshot shows the 'Credits for Payment - CREDIT-1-USD' form. It has a title bar with a close button (X). Below the title is an 'EDIT' tab and a ribbon with icons for Save, Cancel, Paste, Copy, Delete Item, Attach File, and Spelling. The form fields are:

- Credit Account Number \*: CREDIT-1-USD
- Initial Credit Amount \*: 500.00
- Currency Code: USD (US dollar)
- Credit Status \*: Active

At the bottom, it shows the creation and modification details: 'Created at 3/16/2016 3:34 PM by ageucheva\_a' and 'Last modified at 3/16/2016 3:34 PM by ageucheva\_a'. There are 'Save' and 'Cancel' buttons at the bottom right.

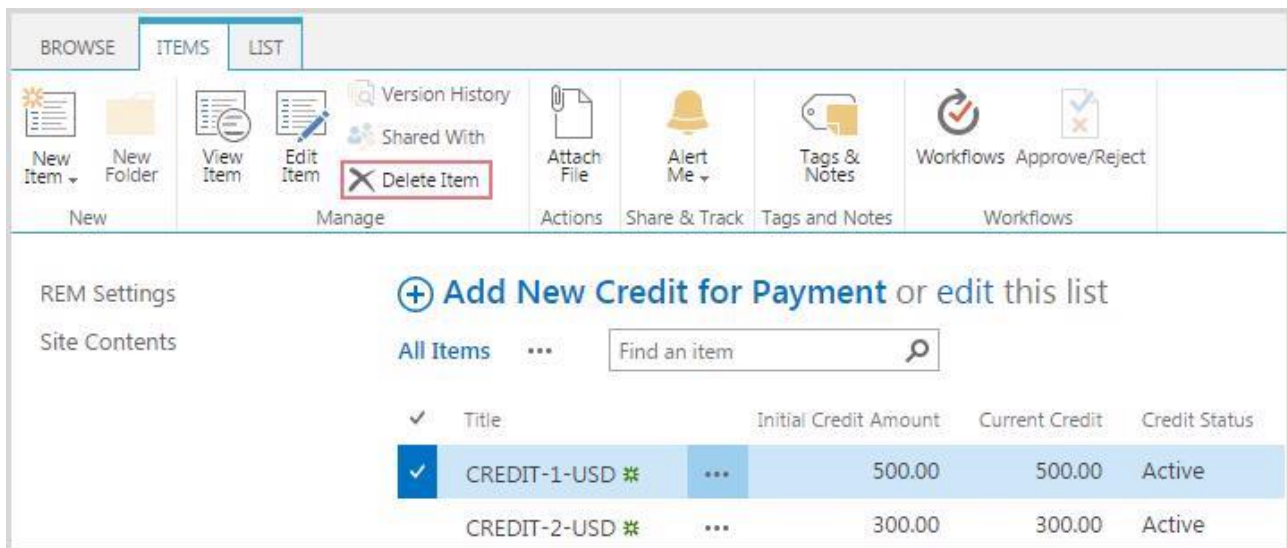
- *Credit Account Number* – the system will generate this title automatically depending on index number and title;
- *Initial Credit Amount* – type the credit sum;
- *Currency Code* – specify the type of currency;
- *Credit Status* – activate or suspend the credit (in case the credit was open but the payment transaction still has not come).

4. Click Save to save the changes.

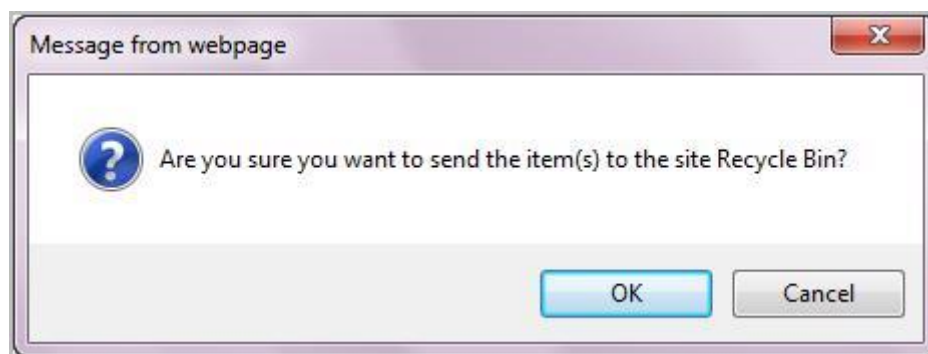
#### 4.1.8.3 Deleting Credits for Payment

To delete a credit, do the following:

1. Go to the Credits for Payment section;
2. Check the box against the needed credit and click Delete Item on the ribbon menu:



3. Click OK to confirm the deletion:



### 4.1.9 Courses Management

In this section, you can manage e-Learning Courses, Blended Learning Courses, Classroom Trainings, Webinar Courses, e-Learning Content Package Courses, and Material Courses. All courses will be ordered in the Courses list:

BROWSE ITEMS LIST

REM My Dashboard Course Catalog REM Settings

LMS365 On-Premises Courses

Recent

Reports Library

REM Settings

Site Contents

All Items Course Catalog Find an item

Title	Short Description	Teachers	Start Date	Organization	Course Category	Course Status	Has Available Offerings	Published
New Course	short description text	Anna Annaaaaa	3/17/2016 12:00 AM		General Employee Training	Active	Yes	Yes
Hardware Course			3/16/2016 12:00 AM	SharePoint		Active	Yes	Yes
Software Course			3/16/2016 12:00 AM	SharePoint		Active	Yes	Yes
Introduction Course			2/8/2016 12:00 AM	SharePoint		Active	Yes	Yes
Computers and Technology Course				SharePoint		Active	Yes	Yes
Webinar			3/17/2016 12:00 AM		IT and Technical Training	Active	No	Yes
Course 1			4/6/2016 12:00 AM	SharePoint		Active	Yes	No
e-Learning Content Package			3/16/2016 12:00 AM		Developer Training	Active	Yes	No








#### 4.1.9.1 Course Creation

In REM version 5.0 and higher courses must be created manually. The Synchronize Courses tool can only update the existing courses, but not add the new ones.

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 ▼
--	---	--	---	--	--


**Course Title \***

**Short Description**

short description text


**Long Description**


detailed description text

**Course Category \***  

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

**Published**

**Start Date**  

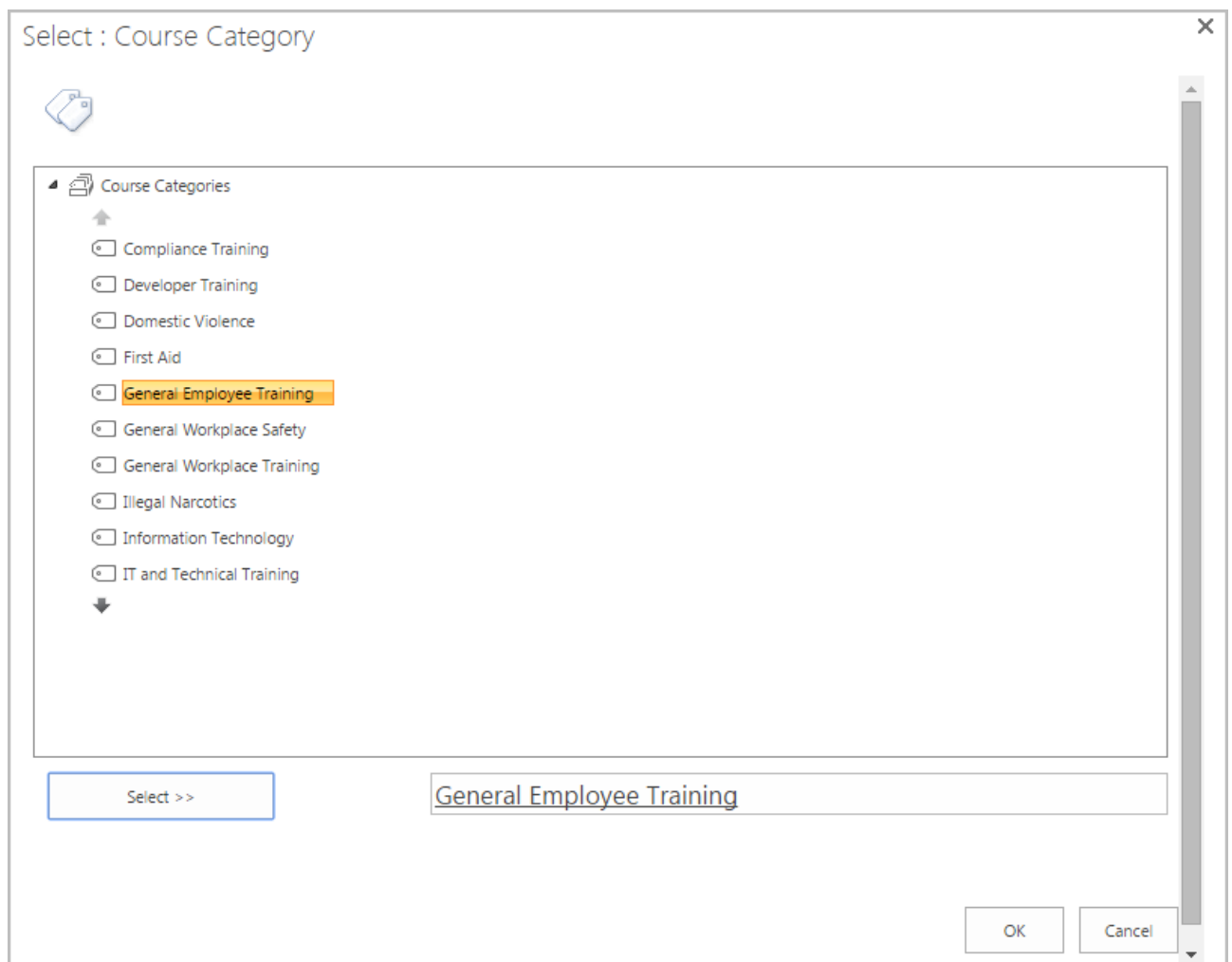
**End Date**  

**Course Image** Type the Web address: [\(Click here to test\)](#)  
  
 Type the description:  
  
[Select Image](#)

[⊞ Advanced Settings](#)

- *Course Title* – contains the name of the course;


- *Short Description* – text field for clear description of the course which will be displayed in Dashboard and Course Catalog page. It is recommended to put here essential description, as it will help users select a course from courses list, for example;
- *Long Description* – field for the detailed HTML course description which will be displayed in the course details page. The description here may be as detailed as you wish, it may help users understand what they will learn in the course and make decision about enrolling into course;
- *Course Category* – contains the course category. Click 'Browse' and select Course Category from the list:



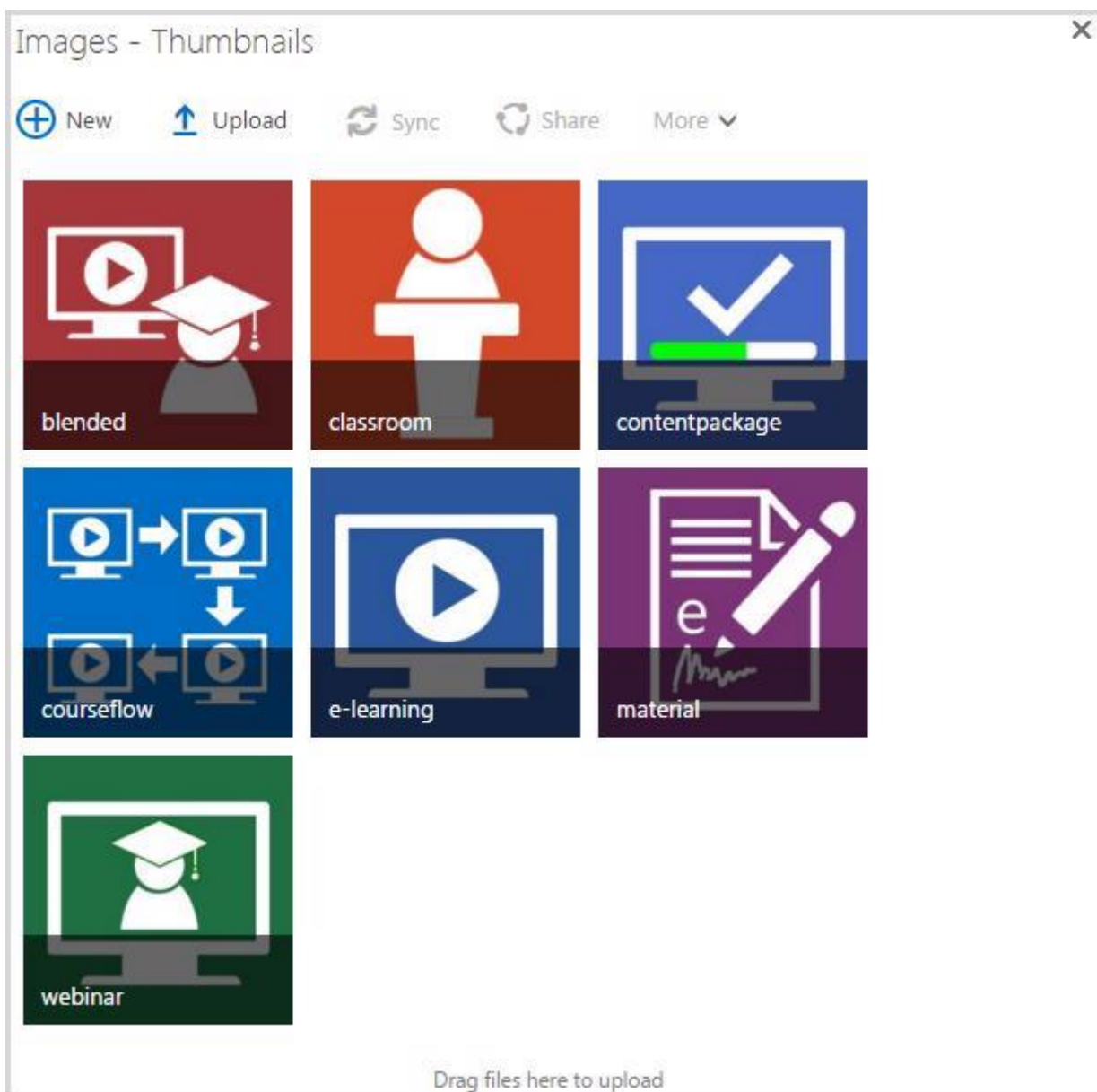
- *Course Duration* – contains the course duration period;
- *Published* – enabling this option makes the course available for enrolling;
- *Start Date* – contains date and time when the course begins;
- *End Date* – contains date and time when the course finishes;
- *Course Image* – contains the Web address for the course image;

If ELEARNINGFORCE - REM: Image Picker feature is activated, Image Picker is enabled:



Image Url	Type the Web address: <a href="#">(Click here to test)</a>
	<input type="text" value="http://"/>
	Type the description: <input type="text"/>
<a href="#">Select Image</a> 	

Clicking the Select Image link opens the Images library, where you can select or upload new image for your course logo directly from the New Course creation form:



**NOTE:** To activate the feature, go to Settings > Site Settings > Manage site settings and activate the ELEARNINGFORCE - REM: Image Picker feature:



#### ELEARNINGFORCE - REM: Image Picker

The feature makes use of default publishing image library to pick images in forms

Activate


The feature can be activated only after ELEARNINGFORCE - REM: Publishing feature activation.

If no image is selected, default image will be added depending the Course Type.

Advanced settings section contains non-required fields and options that can be activated by separate features in the Site Settings:

**Advanced Settings**

**Certificates Expiration**

Never  
 Days after completion   
 Date  

**Extended Validity Period**

If training is undertaken within the specified period, the new validity period will be counted from the original expiry 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**



English-Spoken-Above Average (4)

[+ Add new](#)



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

**Training Points**

**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**

**Show link to course site**

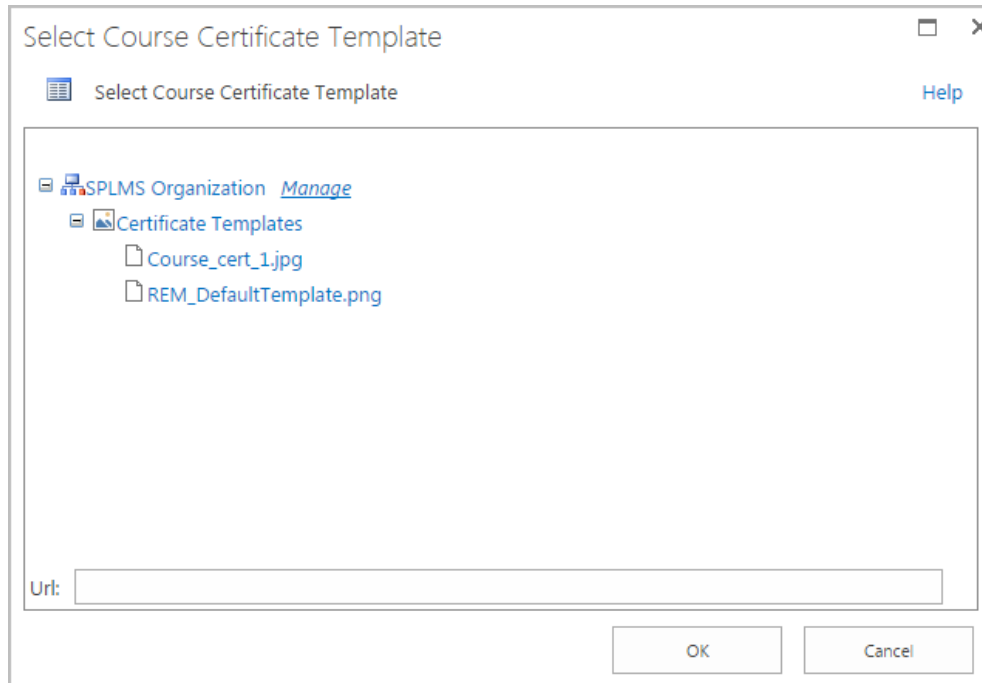
**Other Info**

**Qualified Teachers**

Enter users separated with semicolons.  

**Administrators Comments**

- *Course Certificate* – default Course Certificate Template from primary SPLMS Organization is set. Use 'Browse' to select another certificate template:



**NOTE:** The default Course Certificate looks the following way:



	To select different certificate template user should have read permissions to the "Certificate template" list in LMS Organization.
<b>NOTE:</b>	For e-Learning and Blended Learning Courses, a Certificate template cannot be selected. Instead, certificate set for the related course in LMS is used in these REM courses.

- *Certificates Expiration* - allows setting options for certificates expiration:
  - *Never* – select this option to disable certificate expiration;
  - *Days after completion* – select this option and set the number of days, after which the certificate for this course becomes expired;
  - *Date* – select this option and set the date on which the certificate becomes expired;
  - *Extended Validity Period* – specify the number of days after course completion within which user can retake the course and get a new valid certificate (the previous one is still valid until expiration date comes) with the expiration date counted from the original expiration date and not from the moment when user has got a new certificate (this option relates only to Days after completion option);
  - *Email Notification Settings* – specify the number of days before certificate expiration (multiple values are allowed separated by comma) when user is notified about it, and select users who will receive the email;

These options are available only if '[REM: Certificates Expiration](#)' feature is activated.

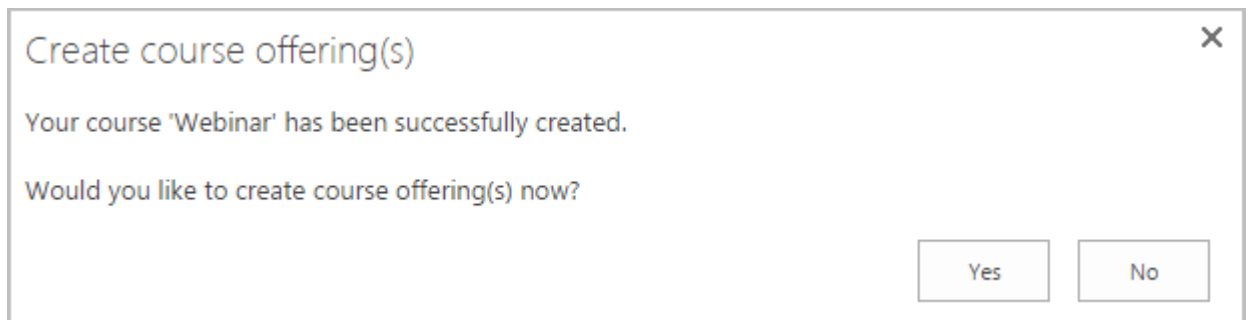
- *Automatically revoke competencies when certificate expires* – check this option to revoke automatically associated competencies when certificate expires (user registration status is Certificate Expired). This option is not available when Never value is checked for Certificates Expiration;

<b>NOTE:</b>	This option is enabled when EARNINGFORCE – REM: CCM Integration and EARNINGFORCE – REM: Certificates Expiration features are activated.
--------------	---

The competency level when certification is revoked will be the last assigned level before the certification was issued. In the competency history current level will be revoked if there are no any previously assigned levels; if there are – current level is revoked and the last approved competency level is acquired;

- *Competencies* – allows assigning a CCM competency to be granted automatically to the users who complete the course. The field is available only if REM CCM Integration feature is activated;
- *Training Points* – set the amount of training points awarded for passing the course. The field is available only if REM: Training Points feature is activated;
- *Required for Groups* – contains the AD or SP groups this course will be visible for. This course will be required for all users belonging to the specified group. The field is available only if '[REM: Course Targeting](#)' feature is activated;

- *Recommended for Groups* – contains the AD or SP groups this course will be visible for. All users belonging to the specified group will be recommended this course. The field is available only if [‘REM: Course Targeting’ feature](#) is activated;
- *Create Default Offering* – if this option is enabled, a default course offering is created automatically after course creation. If the option is disabled user is prompted to create a new course offering:



- *Hide from Course Catalog* – if this option is enabled, the course will not be displayed in Course Catalog;
- *Other Info* – contains any other important information related to the current course;
- *Qualified Teachers* – allows setting course teachers. Only users specified in this field can be assigned as Teachers in the Course Offerings created for the parent course;

**NOTE:** If this field remains empty, any user can be assigned as Teacher in the Course Offerings created for the parent course.

- *Administrators Comments* – contains comments related to site administration field;
- *Show link to course site* – option is available for e-Learning and Blended course types (by default checked for Blended courses). If it is enabled, user will be able to navigate to LMS course site from registration details and dashboard pages:

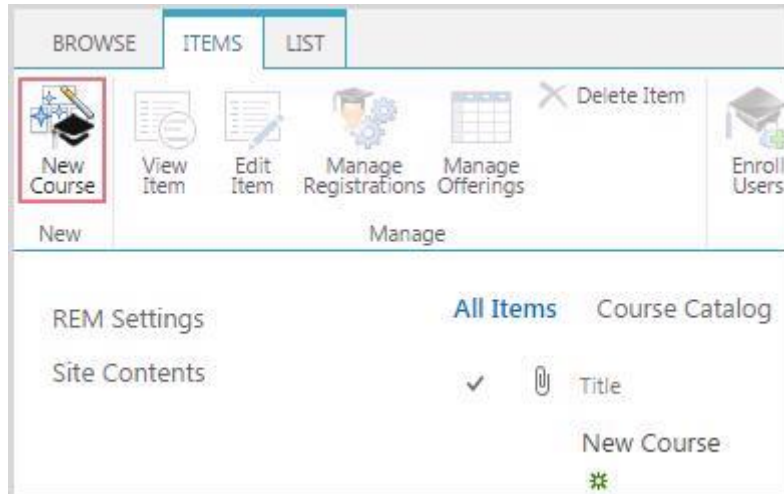


After Course creation a Course Offering is automatically created for e-Learning Course Site, e-Learning Content Package and Material Course type using the default [Enrollment Template](#) set for each course type.

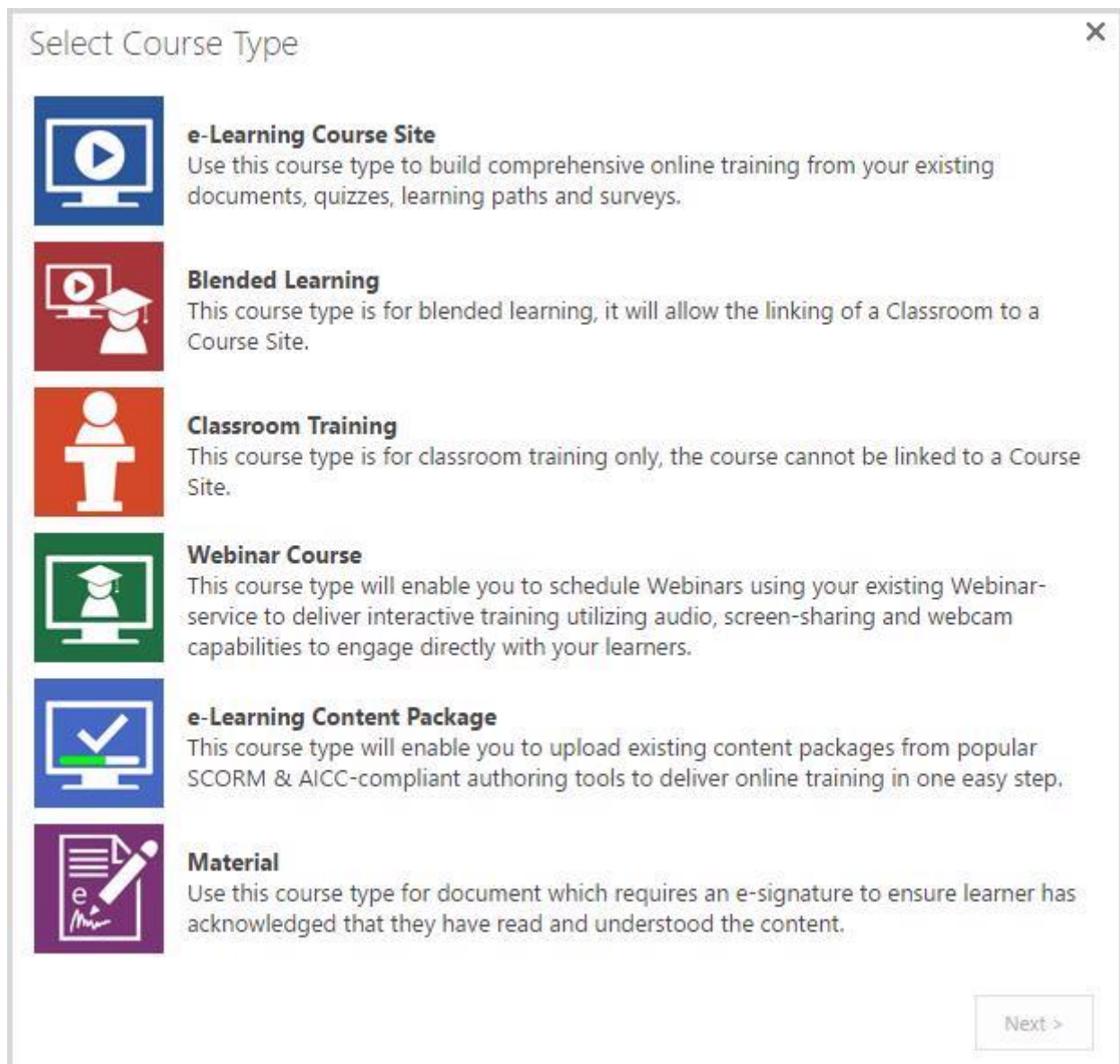
#### 4.1.9.1.1 *Course Wizard for Course Creation*

Course Wizard is designed for more convenient creation of the Courses and Course Offerings. To create a new course using Course Wizard, do the following actions:

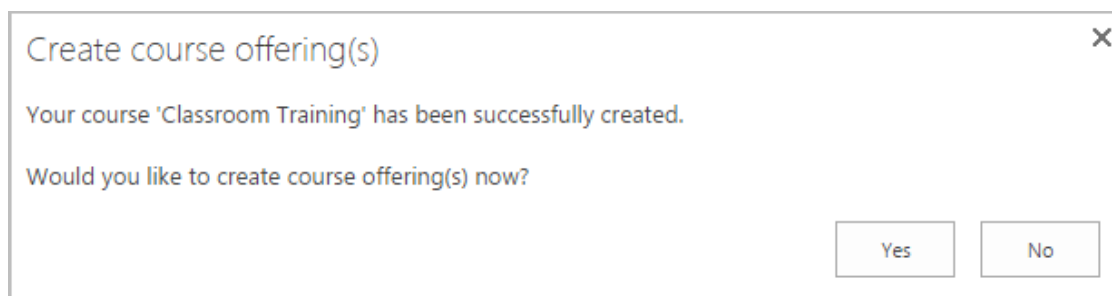
1. Go to the Courses section;
2. On the ribbon menu go to Items > New Course:



3. In the pop-up window select Course Type and click Next:



4. Fill in the Course Creation form as described in section 4.1.9.1 depending on the course type and click Save. For e-Learning Course Site, e-Learning Content Package and Material Course type new Course Offerings are created automatically using the default enrollment template. For other course types you will be suggested to proceed to Course Offerings creation;
5. Confirm Course Offering creation in the pop-up:



6. Fill in new Course Offering form as described in the [Creating Course Offerings](#) section;
7. Click 'Finish' button to save changes and return to the Courses section or click 'Save and Create Another' button to save changes and create another Course Offering for the same course.

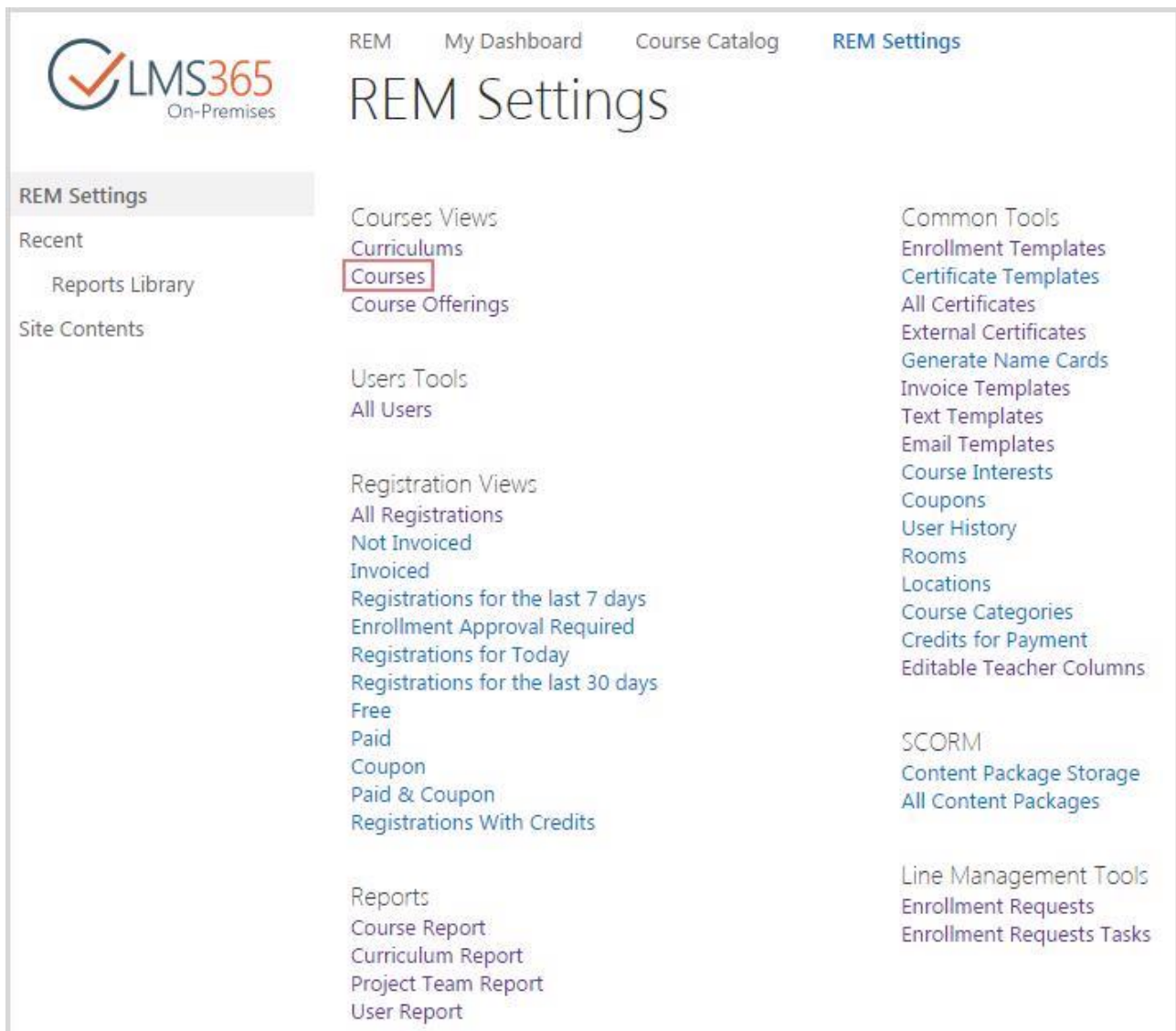
**NOTE:** You can create unlimited number of Course Offerings for one Course; the only condition is to differentiate Course Offerings by Access Period.

#### 4.1.9.1.2 *Creating e-Learning Course Sites*

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

1. Go to the Courses section on REM Settings page:





REM    My Dashboard    Course Catalog    **REM Settings**

# REM Settings

**REM Settings**

Recent

    Reports Library

Site Contents

Courses Views  
 Curriculums  
**Courses**  
 Course Offerings

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

2. On the ribbon menu go to Items > New Course;
3. Select e-Learning Course Site and click Next:


### Select Course Type X




**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.

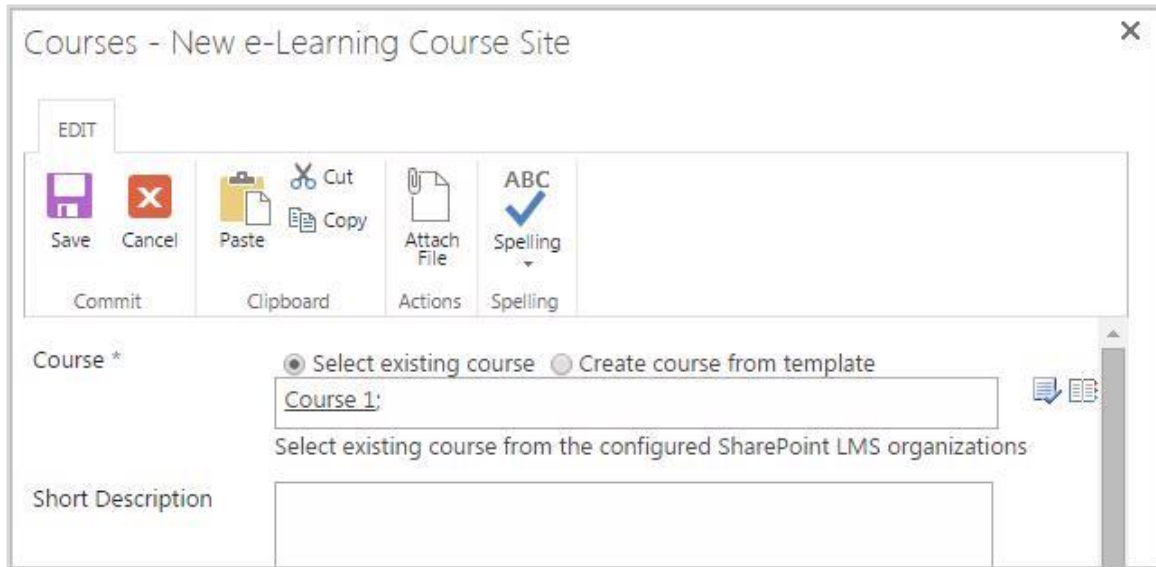


**e-Learning Content Package**  
This course type will enable you to upload existing content packages from popular SCORM & AICC-compliant authoring tools to deliver online training in one easy step.



**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.

4. 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:

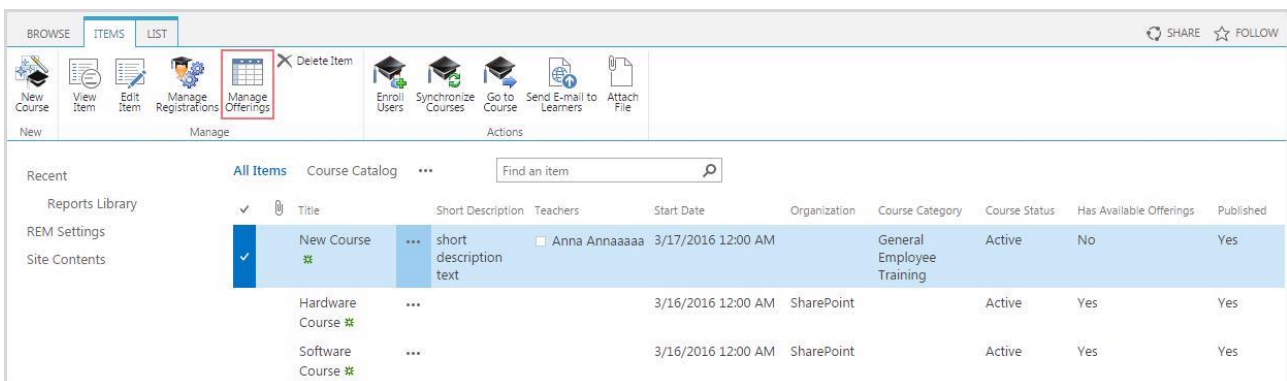


- *Course* – check the radio button to specify the way of course creating: Select Existing Course or [Create Course From Template](#); type the name of the course you want to add, and then click the Check Names (🔍) button OR use the Browse (📄) button to find the course; this can be any course from the configured LMS organization. When you select an existing course, values for 'Short Description', 'Teachers', 'Published', 'Start Date' and 'End Date' fields are taken from the selected LMS course;

**NOTE:** You can create only one REM item associated with a certain LMS course; i.e. there is no way to create an e-Learning Course and Blended Learning Course (or two e-Learning Courses) with the same LMS course at the same time.

5. Click Save to add the new e-Learning Course Site.

After e-learning Course Site is created, a course offering is generated for it automatically using default enrollment template. To manage Course offerings for the course, select the needed course and click 'Manage Offerings' in the ribbon menu:

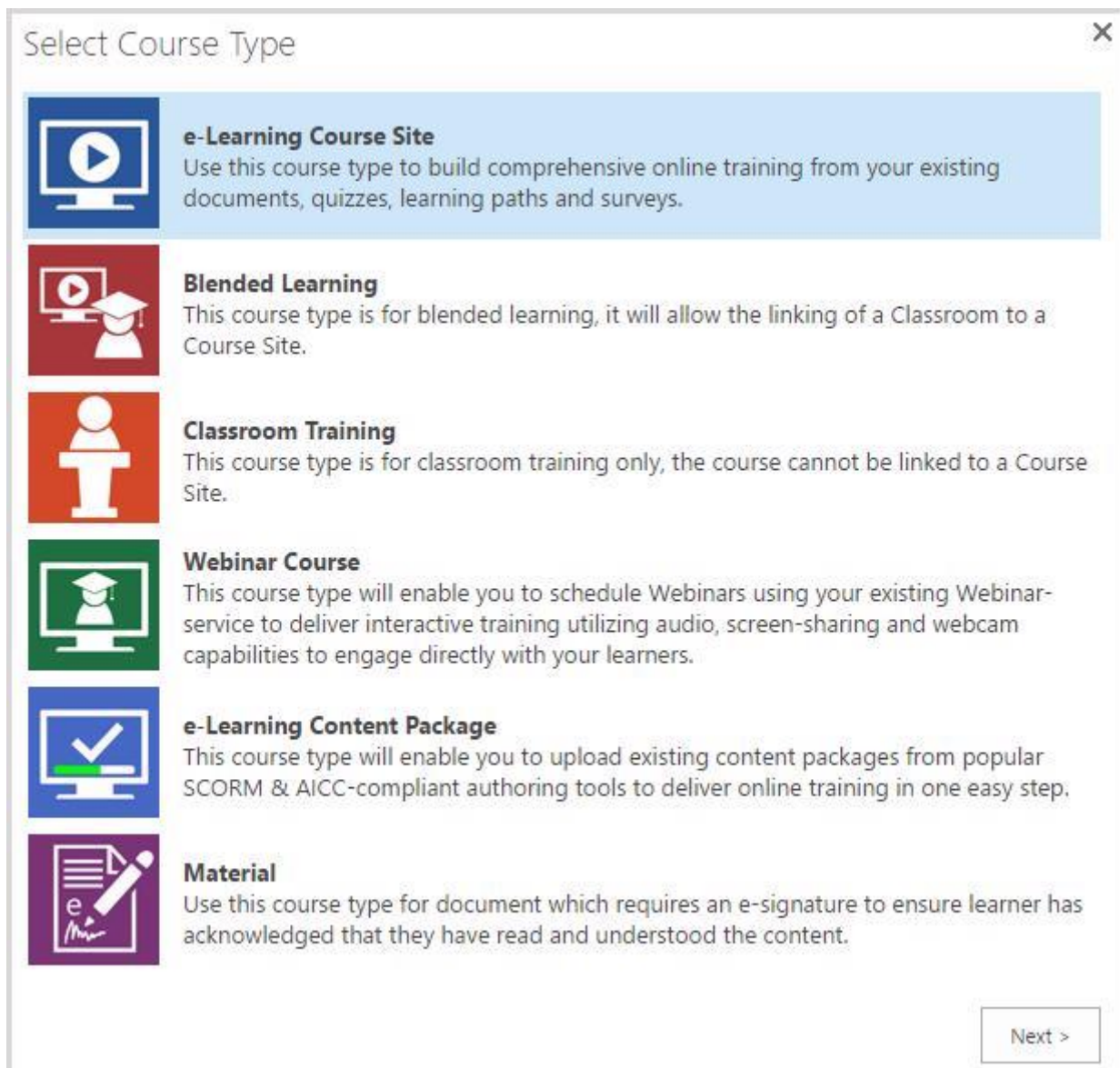


**NOTE:** The courses are periodically updated by Synchronization Job during the [synchronization process](#) with configured LMS Organization.  
 Registrations to e-Learning Course Sites are also updated by GradeBook course completion event: when user completes corresponding course in LMS, registration status in REM is instantly changed to 'Course Completed'.

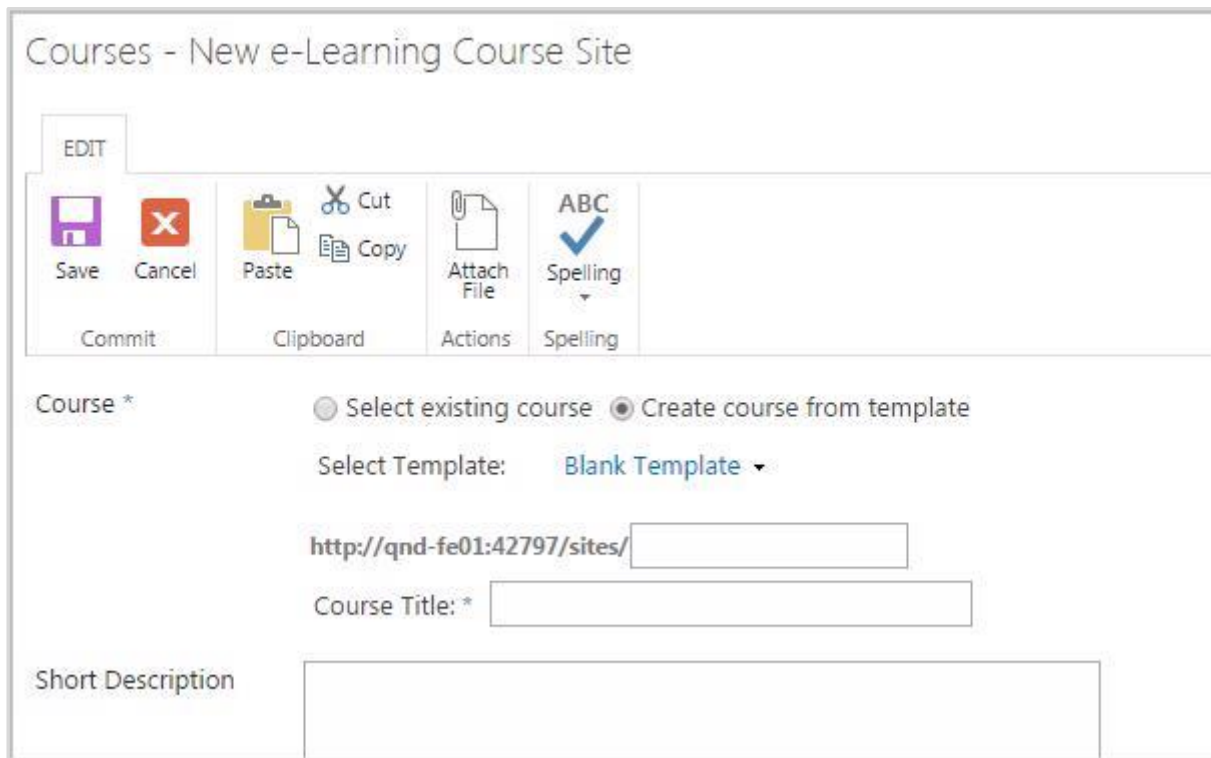
#### 4.1.9.1.3 Creating e-Learning Courses from Templates

To create a new course from template, do the following:

1. Go to the Courses section on the REM Settings page;
2. On the ribbon menu go to Items > New Course;
3. Select e-Learning Course Site and click Next:



- Choose Create Course From Template radio-button and complete the open form as described [above](#):

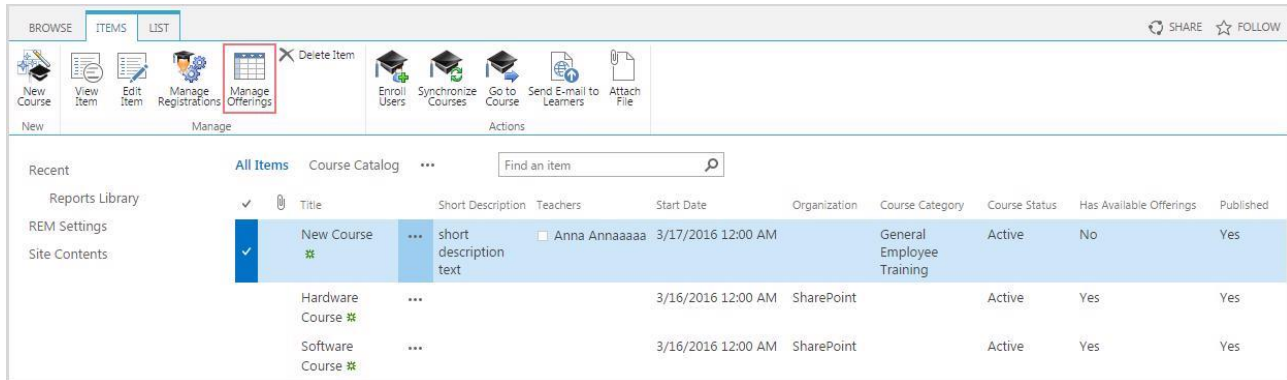


- *Select Template* – select the Template from course templates on SPLMS Organizations assigned to REM or type its URL. If Blank Template is selected, a new course is created in primary LMS Organization set for REM.

**NOTE:** You can create only one REM item associated with a certain LMS course; i.e. there is no way to create an e-Learning Course and Blended Learning Course (or two e-Learning Courses) with the same LMS course at the same time.

- Click Save to add the new Course.

After e-learning Course Site is created, a course offering is generated for it automatically using default enrollment template. To manage Course offerings for the course, select the needed course and click 'Manage Offerings' in the ribbon menu:



The screenshot shows the LMS365 interface with the 'ITEMS' ribbon tab selected. The 'Manage Offerings' option is highlighted. Below the ribbon, a table displays course offerings with the following data:

Recent	All Items	Course Catalog	Find an item							
Title	Short Description	Teachers	Start Date	Organization	Course Category	Course Status	Has Available Offerings	Published		
New Course	short description text	Anna Annaaaaa	3/17/2016 12:00 AM		General Employee Training	Active	No	Yes		
Hardware Course			3/16/2016 12:00 AM	SharePoint		Active	Yes	Yes		
Software Course			3/16/2016 12:00 AM	SharePoint		Active	Yes	Yes		


#### 4.1.9.1.4 Creating Blended Learning Course

This type of course supposes combination of teaching online and in a class. It is associated with a LMS course.


To add a new Blended Learning course to REM, do the following:

1. Go to the Courses section on the REM Settings page;
2. On the ribbon menu go to Items > New Course;
3. Select Blended Learning 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.

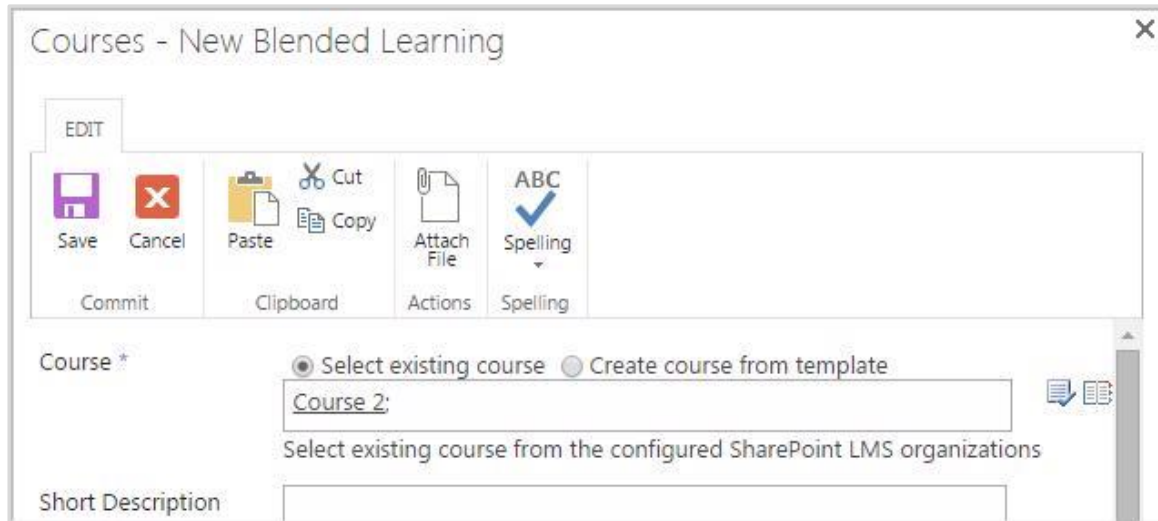


**e-Learning Content Package**  
This course type will enable you to upload existing content packages from popular SCORM & AICC-compliant authoring tools to deliver online training in one easy step.



**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.

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

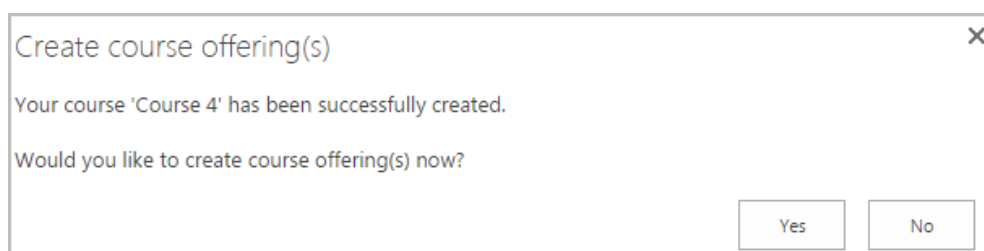


- *Course* – check the radio button to specify the way of course creating: Select Existing Course or [Create Course From Template](#); type the name of the course you want to add, and then click the Check Names (🔍) button OR use the Browse (📁) button to find the course; this can be any course from the configured LMS organization. When you select an existing course, values for 'Short Description', 'Teachers', 'Published', 'Start Date' and 'End Date' fields are taken from the selected LMS course.

**NOTE:** You can create only one REM item associated with a certain LMS course; i.e. there is no way to create an e-Learning Course and Blended Learning Course (or two e-Learning Courses) with the same LMS course at the same time.

5. Click Save to add the new course.

After Blended Learning course is successfully created, you can proceed directly to Course Offerings creation:



#### 4.1.9.1.5 Creating Classroom Training


This type of course is held only in class without any online tasks; this type is not associated with any LMS course.



To add a new Classroom Training to REM, do the following:


1. Go to the Courses section on the REM Settings page;
2. On the ribbon menu go to Items > New Course;
3. Select Classroom Training 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.

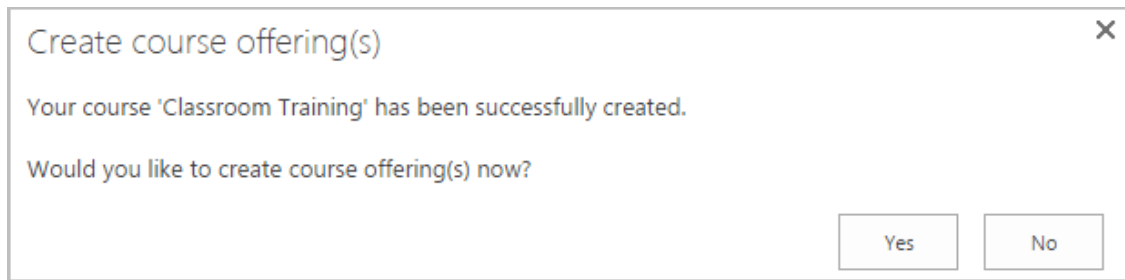


**Material**

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

4. Complete the open form as described [above](#).
5. Click Save to add the course. It will appear in the list of courses.

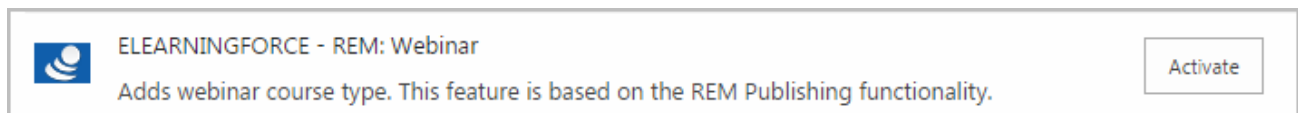
After Classroom Training course is successfully created, you can proceed directly to Course Offerings creation:



#### 4.1.9.1.6 *Creating Webinar Courses*

This type of course creates a webinar using the existing Webinar service. This course type is not associated with any LMS course.

It can be created in REM after activation of EARNINGFORCE – REM: Webinar feature:




**NOTE:** This feature can be activated only after REM Publishing feature activation.


To add a new Webinar Course to REM, do the following:

1. Go to the Courses section on the REM Settings page;
2. On the ribbon menu go to Items > New Course;
3. Select Webinar Course 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.

4. Complete the open form as described [above](#);
5. Click Save to add the course. It will appear in the list of courses.

After Webinar course is successfully created, you can proceed directly to Course Offerings creation:

### Create course offering(s) ✕


Your course 'Webinar' has been successfully created.

Would you like to create course offering(s) now?

#### 4.1.9.1.7 *Creating e-Learning Content Package*

E-Learning Content Package is a course type that allows uploading existing content packages (SCORM/AICC) to deliver online training in one step.

It can be created in REM after activation of ELEARINGFORCE – REM: e-Learning Content Package feature:


 ELEARINGFORCE - REM: e-Learning Content Package  
Adds e-Learning Content Package course type. This feature is based on the REM Publishing functionality. Activate

**NOTE:** This feature can be activated only after REM Publishing feature activation.


To create an e-Learning Content Package, do the following actions:

1. Go to the Courses section on the REM Settings page;
2. On the ribbon menu go to Items > New Course;
3. Select e-Learning Content Package 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.

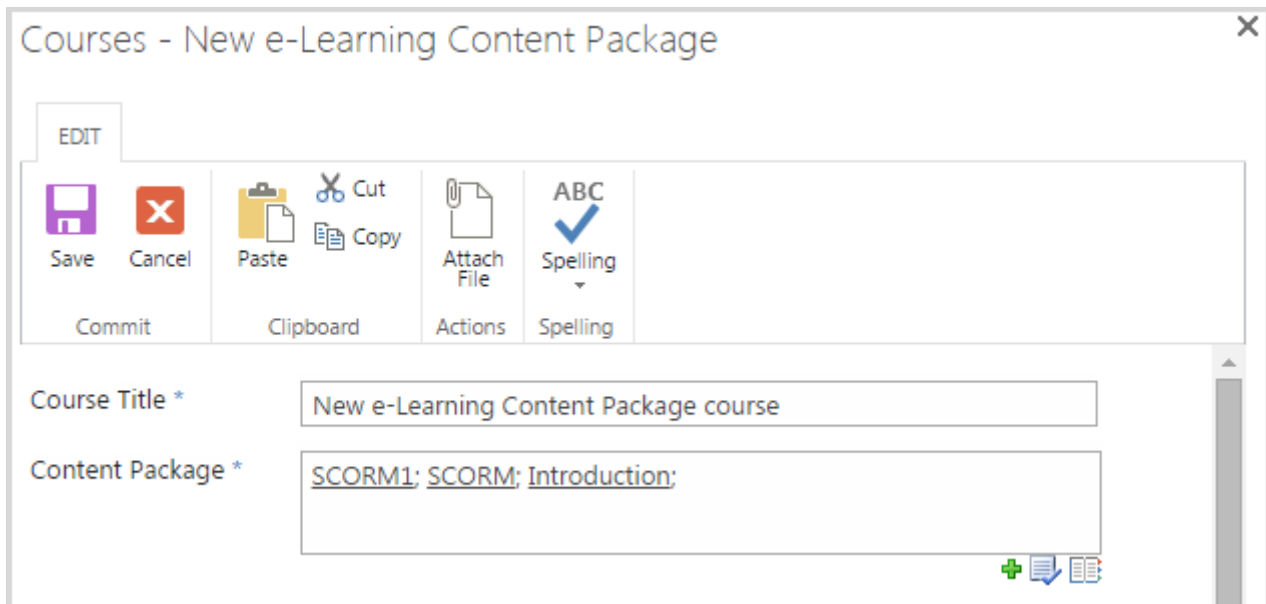


**e-Learning Content Package**  
This course type will enable you to upload existing content packages from popular SCORM & AICC-compliant authoring tools to deliver online training in one easy step.

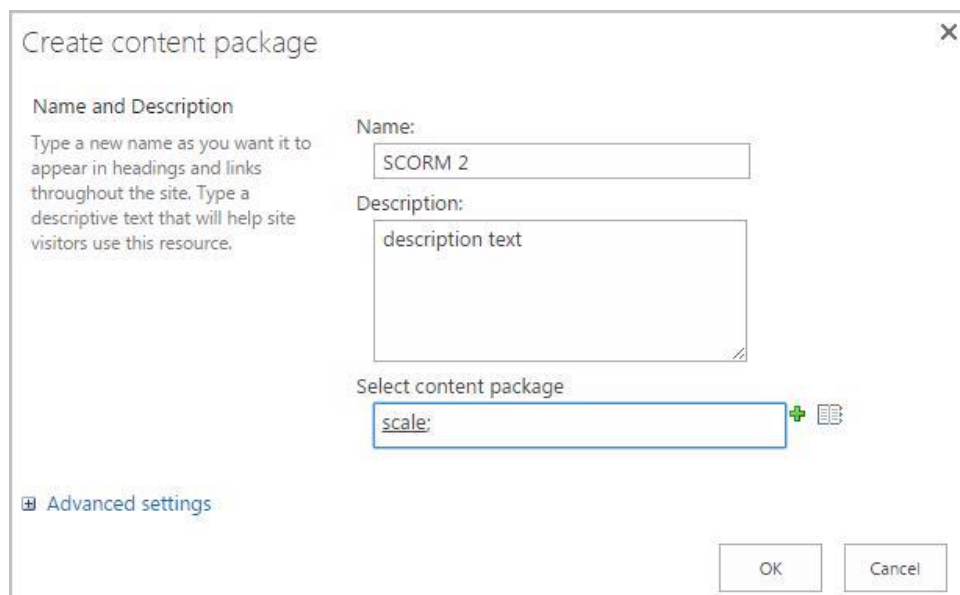


**Material**  
Use this course type for document which requires an e-signature to ensure learner has acknowledged that they have read and understood the content.

4. Fill in the open Course creation form as described [above](#). The only difference from the standard course creation form is Content Package selection and setting completion settings:

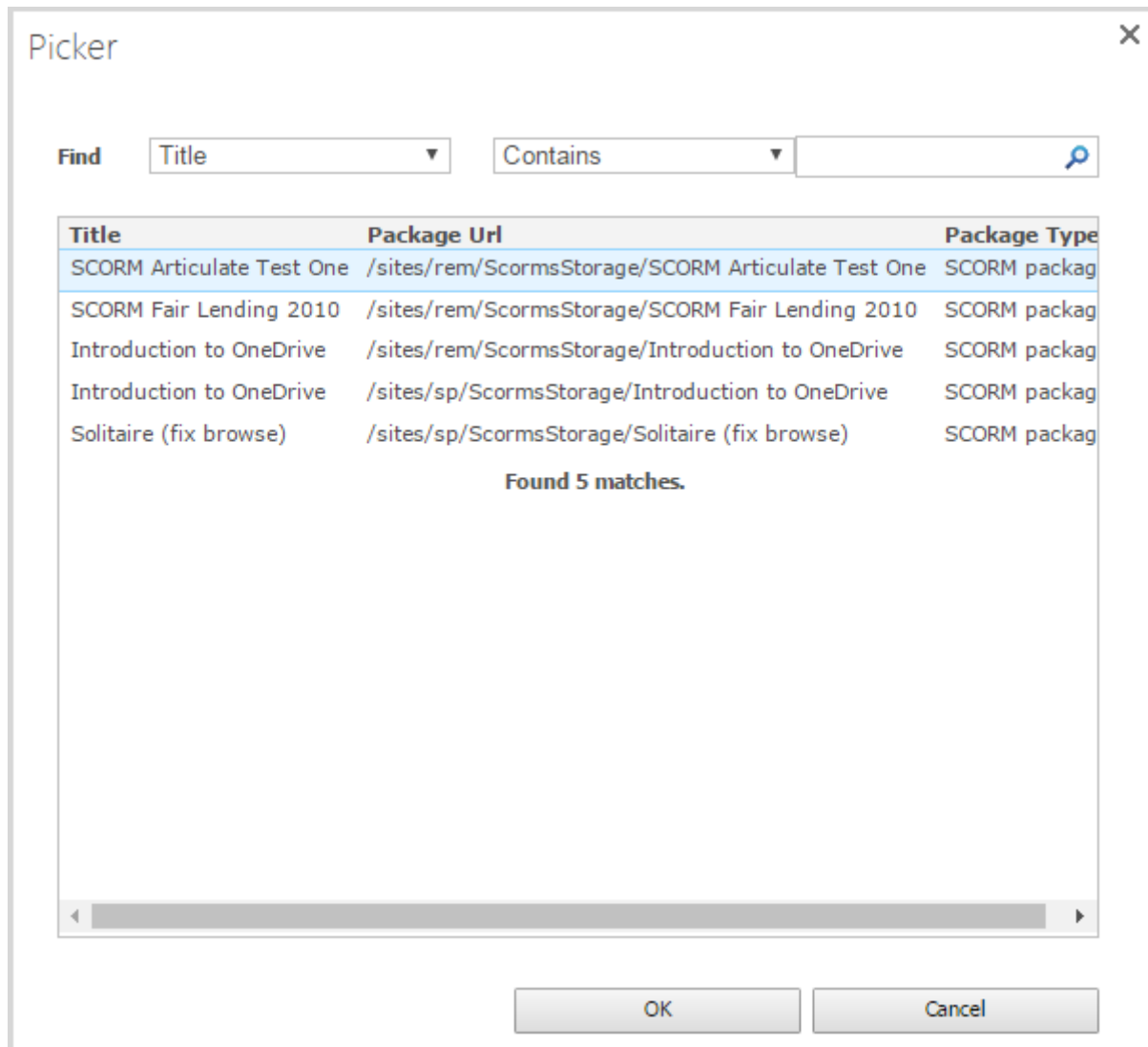


- *Content Package* – select existing or create new content package. It is possible to select more than one content package in the picker; Click Create (+) to upload a new content package:



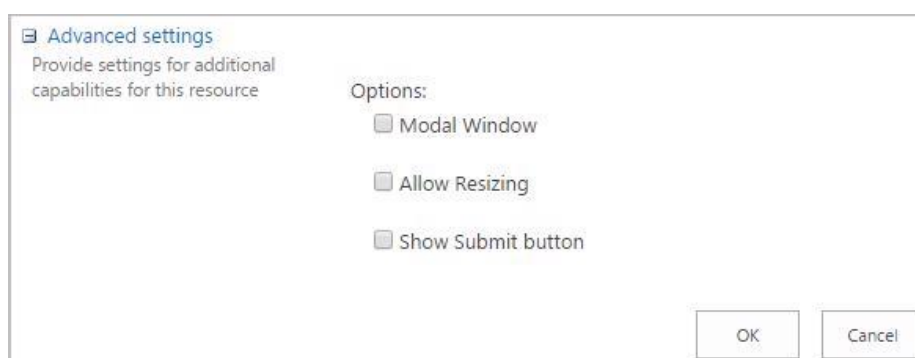
**NOTE:** The new package will be uploaded to a library in the first SPLMS Organization set for this REM in Central Administration.

Or click Browse (📁) to select existing content packages. The packages picker searches among all SCORM/AICC packages uploaded to the REM Host Site and first SPLMS Organization set for this REM:

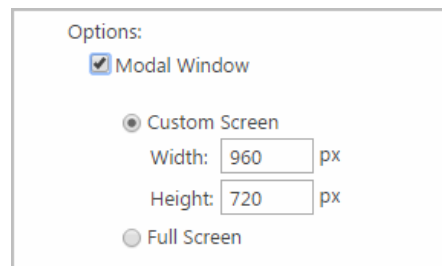


After SCORM/AICC package selection an 'Advanced settings' section appears. Depending on the content package type which is detected automatically, different settings are available.

If AICC package was selected:



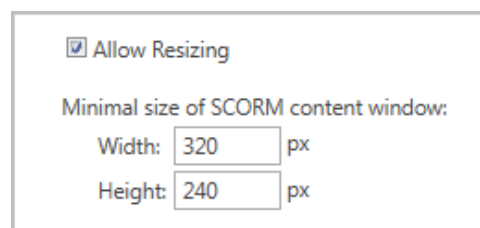
- *Modal Window* - select the checkbox if you want the SCORM to be opened in a modal window (the option automatically disables 'Open in new window' option):



Options:

- Modal Window
- Custom Screen
  - Width:  px
  - Height:  px
- Full Screen

- *Custom Screen* – specify the custom size of the SCORM modal window (in pixels);
  - *Full Screen* – select the checkbox to maximize the SCORM modal window;
- *Allow Resizing* – select the checkbox to allow users changing the size of the SCORM content window. When the option is checked, you will have to specify the minimal size of the SCORM content window (in pixels):



Allow Resizing

Minimal size of SCORM content window:

- Width:  px
- Height:  px

- *Show Submit button* – select the checkbox to display the 'Submit' button for Learners.

If SCORM package was selected:



**Advanced settings**  
Provide settings for additional capabilities for this resource

Options:

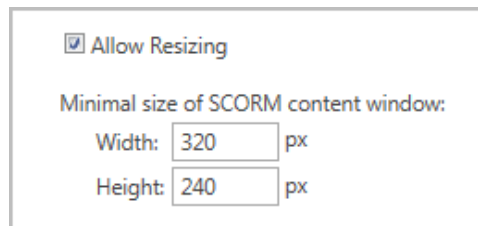
- Open in new window
- Modal Window
- Allow Resizing
- Allow Browse (realised in sco)
- Allow Review (realised in sco)
- Allow user to resume incomplete attempt if Completion Status = 'No'
- Use control mode flow for all nodes
- Show statistics for learner
- Show navigation buttons
  - Show Next button
  - Show Back button
  - Show Suspend button
  - Show Exit button
  - Show table of content
- Show node completion status
- Treat complete as passed
- Finish by lesson status
  - Redirect to statistics page when completed
  - Go to next SCO automatically

- *Open in New Window* - select the checkbox if you want the SCORM to be opened in a new window (the option is checked by default);
- *Modal Window* - select the checkbox if you want the SCORM to be opened in a modal window (the option automatically disables 'Open in new window' option):

Options:

- Modal Window
- Custom Screen
  - Width:  px
  - Height:  px
- Full Screen

- *Custom Screen* – specify the custom size of the SCORM modal window (in pixels);
  - *Full Screen* – select the checkbox to maximize the SCORM modal window;
- *Allow Resizing* – select the checkbox to allow users changing the size of the SCORM content window. When the option is checked, you will have to specify the minimal size of the SCORM content window (in pixels):



- *Allow browse (realized in sco)* – select the checkbox to allow opening the package in the browse mode without selecting an attempt first;

**NOTE:** The Browse option is not shown on *DispForm (dispform.aspxas)*. It does not apply to the attempt, but to the whole SCORM package. When a user opens SCORM in browse mode, no attempt is created in the User Interface. It is only stored in cache.

- *Allow Review (realized in sco)* - select the checkbox to allow opening the package in the review mode. The option becomes available only if one attempt is selected as applicable to an attempt. If two or more selected, it is disabled;

**NOTE:** The Review option is not shown in Edit Content Block dropdown menu as it applies to a single attempt. When a user opens the SCORM in the Review mode, no attempt is created in UI, it's only stored in cache.

**NOTE:** When the package is opened in the Review mode, it may allow a user to navigate between the nodes. Also it allows users to show both the user's answers and the correct answers for the assessments. The later depends on the SCORM package. When a user opens an unfinished attempt in the Review mode, he is redirected to the first slide, as opposed to a slide where he stopped the attempt. He/she cannot continue the attempt from the Review mode.

- *Allow user to resume incomplete attempt if SCORM Completion Status = 'No'*- this option allows users continue an incomplete attempt when SCORM completion status = 'No'. Some SCORM packages set this status immediately when starting a SCORM resulting in the "New Attempt" button being displayed to the Learner instead of 'Continue' button.

In the table below possibility to continue attempt depending on status is described:

Completion Status	Success Status	Possibility to Continue Attempt
Yes	Yes	Continue is impossible - it is successful attempt
Yes	No/Empty	Continue is impossible - this can only happen in SCORM 2004 if 'Treat Completed as Passed' is disabled
Empty	Any Status	Continue is possible - such attempt is incomplete, it is not finished attempt. i.e. you can Suspend, or go to another tab
No	Any Status	Continue is possible

**NOTE:** 'Continue' button opens the last from *Incomplete* and *Incomplete with completion status=No* attempts (it depends on their order). After clicking 'Continue' button, User is redirected to the SCO element on which he/she stopped last time.

- *Use control mode flow for all nodes* - the checkbox is selected by default for sequencing control flow. This option is used for a better end-user experience with different kinds of SCORM packages. If this option is selected, after attempting to take the SCORM, you will be redirected right to the SCORM (questions or description if there is any). If you clear the checkbox, the sequencing flow may be violated for the SCORMS where the control flow is set to False by default. The corresponding message will appear. The SCORM content is to be selected manually on the Tools menu. Select/clear the checkbox depending on how you want to implement the sequencing;
- *Show statistics for learner* – select the checkbox to show the result page after completing the SCORM attempt;
- *Show navigation buttons* - select the checkbox to display the bottom bar for switching between the SCORM elements. You can select the checkboxes for 5 options: Next, Back, Suspend, Exit and Table of content buttons;

**NOTE:** If you leave the *Show navigation controls* box unchecked, it will only hide the navigation bars in the SCORM player, but not on the start or statistics pages.

- *Show node completion status* - select the checkbox to display the current completion status of SCORM items;
- *Treat complete as passed* – select this option to consider the complete status as passed;
- *Finish by lessons status* – select the checkbox to specify, if an attempt is finished when lesson status for all elements is set:

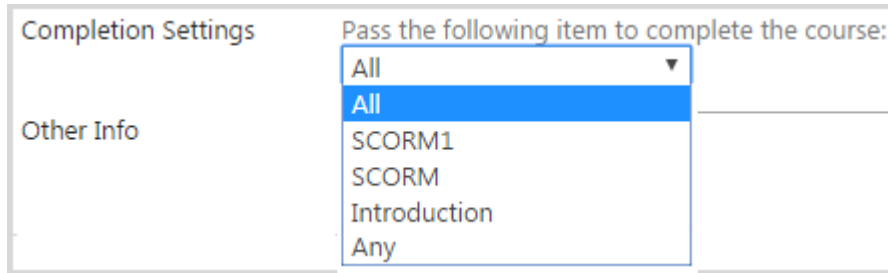
- *Redirect to statistics page when completed* – automatically exits from SCORM after completion to statistics page. It works only for Final SCO element;
- If 'Redirect to statistics page when completed' option is checked, the system automatically moves to the statistics page when SCO element is the last one;
- If the system receives from LMSFinish any SCORM status excluding empty, it moves to the statistics page;
- If 'Allow user to resume incomplete attempt if SCORM Completion Status = 'No' и 'Redirect to statistics page when completed' options are enabled, the system exits if it receives from SCORM at least 1 Positive status (completed/passed);

<b>NOTE:</b>	If 'Redirect to statistics page when completed' is unchecked, user should click 'Next' button to go to the statistics page.
<b>NOTE:</b>	In SCORM 2004 content commands take priority over automatic redirections 'Exit' and 'Next'. In SCORM 1.2 automatic redirections 'Exit' and 'Next' take priority over content commands.

- *Go to next SCO automatically* – automatically moves user to the next SCO element. Works only for Intermediate SCO elements.
- If 'Go to next SCO element automatically' option is checked, the system automatically moves to the next SCO element if the element is intermediate.
- If the system receives from LMSFinish Positive status (completed/passed), it automatically moves to the next SCO element. If the system receives another status, nothing happens.

<b>NOTE:</b>	In SCORM 1.2 if SCO element has completed status = 'Passed' or 'Competed', the system automatically moves to the next SCO element. If SCO element has completed status = 'Failed' or 'Incomplete', the system does not move to the next SCO element. In SCORM 2004 if among SCO element with completed or success status, there is at least one element with status 'Passed' or 'Competed', the system automatically moves to the next SCO element.
<b>NOTE:</b>	If 'Go to next SCO automatically' option is unchecked, to move to the next SCO element, user should click 'Next' button.

- Completion Settings – in advanced settings select items to pass required for the course completion (by default All value is selected):

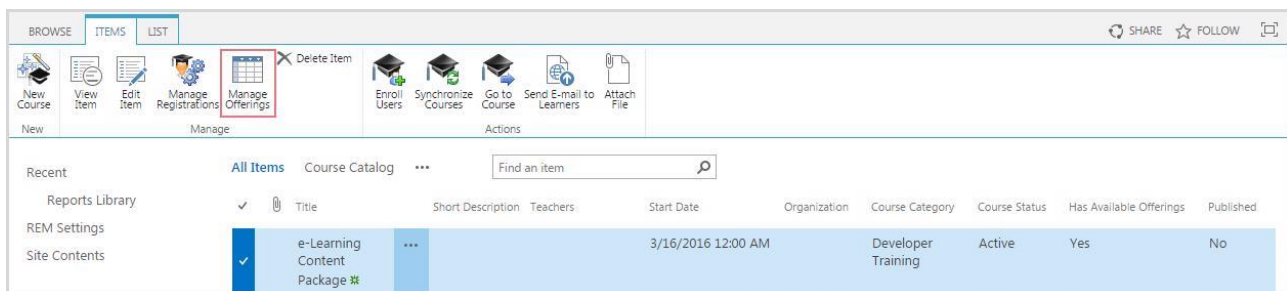


- If All value is selected, course will automatically be completed after the completion of all content packages;
- If Any value is selected, course will automatically be completed after the completion of any content package;
- If other value is selected, course will automatically be completed after the specified content package is completed.

Click OK to confirm the choice of content package and its settings and return to the course creation form.

5. Click Save to add the new course.

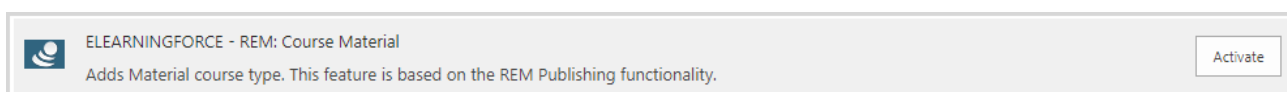
After e-Learning Content Package is successfully created, a course offering is generated for it automatically using default enrollment template. To manage Course offerings for the course, select the needed course and click 'Manage Offerings' in the ribbon menu:



#### 4.1.9.1.8 Creating Material Courses

Material Course is a course type for documents that require learner's e-signature to confirm that he has read and understood the content of the document.

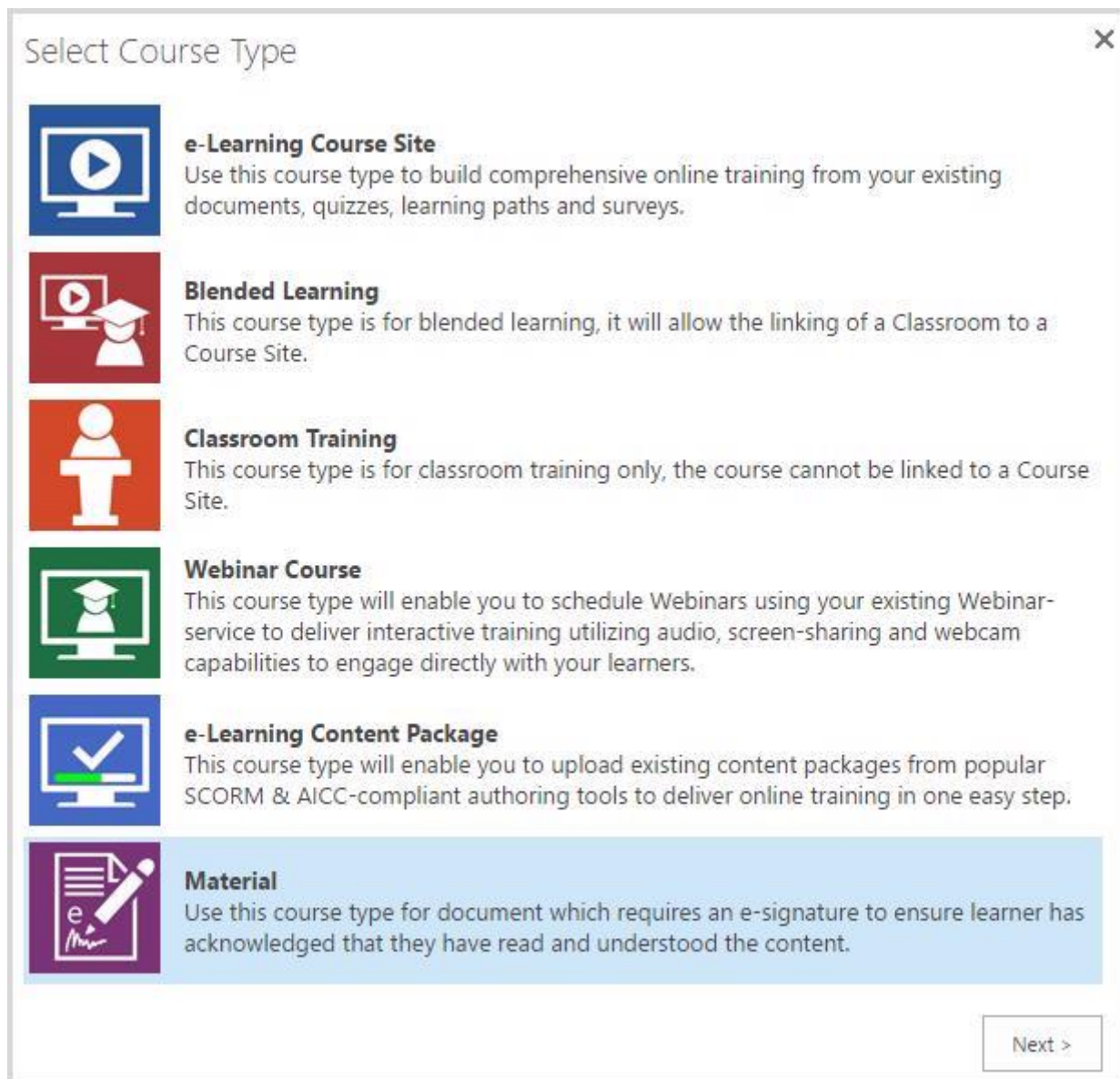
It can be created in REM after activation of EARNINGFORCE – REM: Course Material feature:



**NOTE:** This feature can be activated only after REM Publishing feature activation.

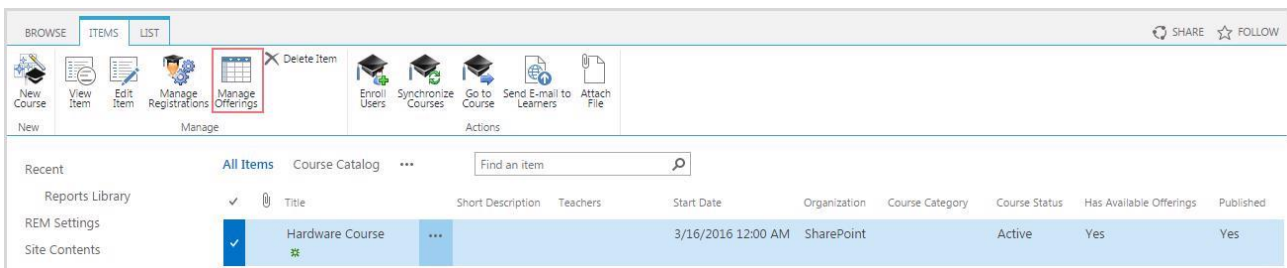
To create a Material Course, do the following actions:

1. Go to the Courses section on the REM Settings page;
2. On the ribbon menu go to Items > New Course;
3. Select Material Course and click Next:



4. Complete the open Course creation form as described [above](#);
5. Click Save to add the new Course.

After Material Course is created, a course offering is generated for it automatically using default enrollment template. To manage Course offerings for the course, select the needed course and click 'Manage Offerings' in the ribbon menu:



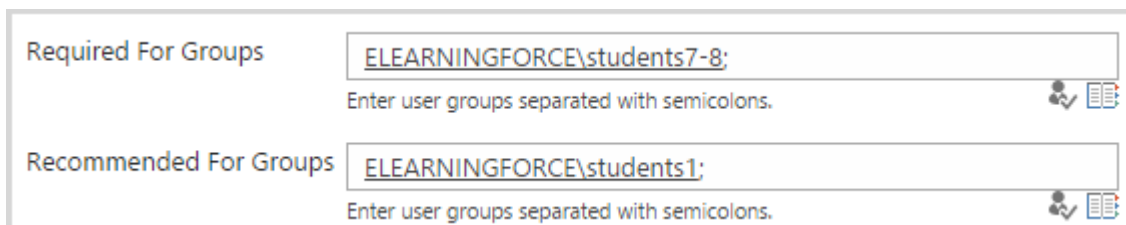
#### 4.1.9.1.9 Target Courses

Course targeting is provided by a site collection feature which allows targeting courses for groups and custom pages which reflect those courses. To activate the feature perform the following steps:

1. On the REM welcome page, go to the Settings > Site Settings section;
2. Go to the Site Collection Administration > Site collection features section;
3. Activate the ELEARNINGFORCE REM Course Targeting feature:



After the feature is activated, it's possible to define what groups the course is targeted for (either AD or SharePoint groups). To do that, go to create or edit a course, and use the new fields added by the feature:



Targeted required and recommended courses will be shown at the following custom pages:

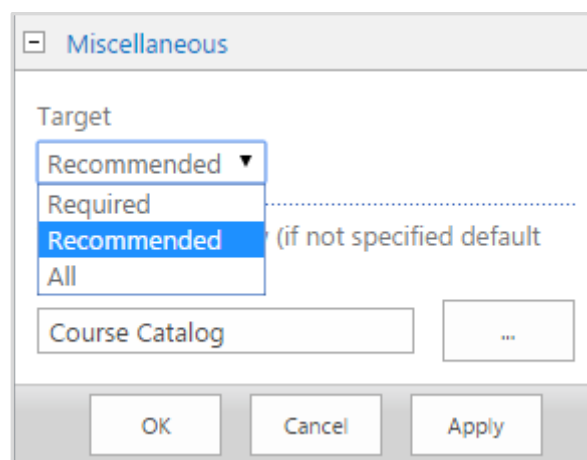
1. On the REM welcome page, go to the Settings > Site Contents section;
2. Find the Pages library and open it, search for pages 'CourseCatalogRecommended' and 'CourseCatalogRequired'.

The pages shown in the site navigation under Course Catalog link (on newly created sites), and you can add them to top link bar if needed as well:



You can enroll into the courses from these pages.

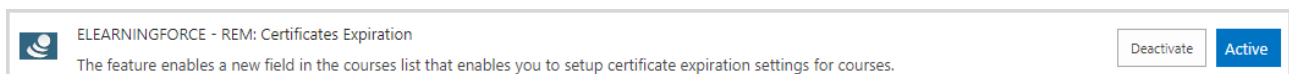
Each of the two pages contains 'Courses' web part mapped to 'Course Catalog' view of the 'Courses' list with either 'Recommended' or 'Required' targeting option:



The pages are not optimized for performance with large amount of items therefore you might hit a threshold limit in case the number exceeds the limit.

#### 4.1.9.2 Recertification Process

Recertification process is available for Online Courses and Online Classrooms only. It is enabled by the *REM Certificates Expiration* site collection feature. To activate the feature, go to Settings > Site Settings > Site Collection Administration > Site Collection Features:



The process of recertification in REM is described below:

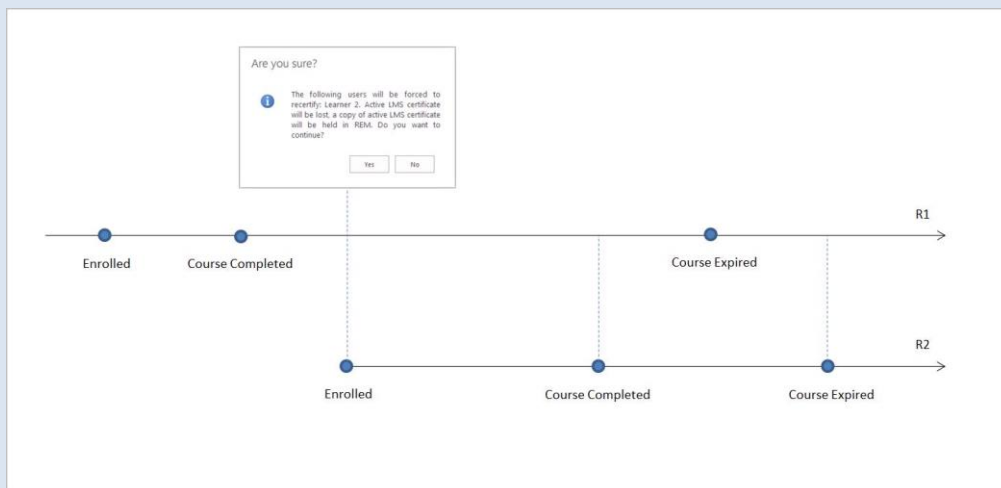
- 1) User is assigned *Course Completed* status – the system sets *Course Completed Date*;
- 2) Recertification process is run by *Auto Recertification Job*. The job runs every day and gets registrations that require recertification. If registrations exist the *Course Offering Maintainer* job will change their status to *Certificate Expired*;



- 3) The reminder emails are sent to the users according to the configured settings by *Course Offering Maintainer* as well;
- 4) The changes in the *Certificate Expiration* field should be considered for registrations that were created before the changes.

If user enrolls to the same course again, his old Certificate remains valid and after course completion a new Certificate with a new Expiration Date is generated for him, so a user can have several valid certificates for the same course.

**NOTE:** This applies for new courses ONLY.  
 For this flow to work on old courses each Course should be assigned a course certificate manually. Otherwise the old flow will be used: after repeated enrollment to a course with a valid certificate it is deleted and a new is issued after course completion:



User's attempts and gradebook are deleted by LMS course and the old certificate is kept as valid until expiration date. On completion of the new enrollment a new certificate is issued. If auto recertification is enabled for a course offering, gradebook will be empty after recertification process and a new certificate with a new date will be generated after recertification when registration status of a course offering is changed to 'Completed'.

**NOTE:** User who has been enrolled in a course offering with the enabled 'Auto Recertification' option via Group Enrollment (as a part of AD group) is not reenrolled in this course if he has been deleted from the AD group.

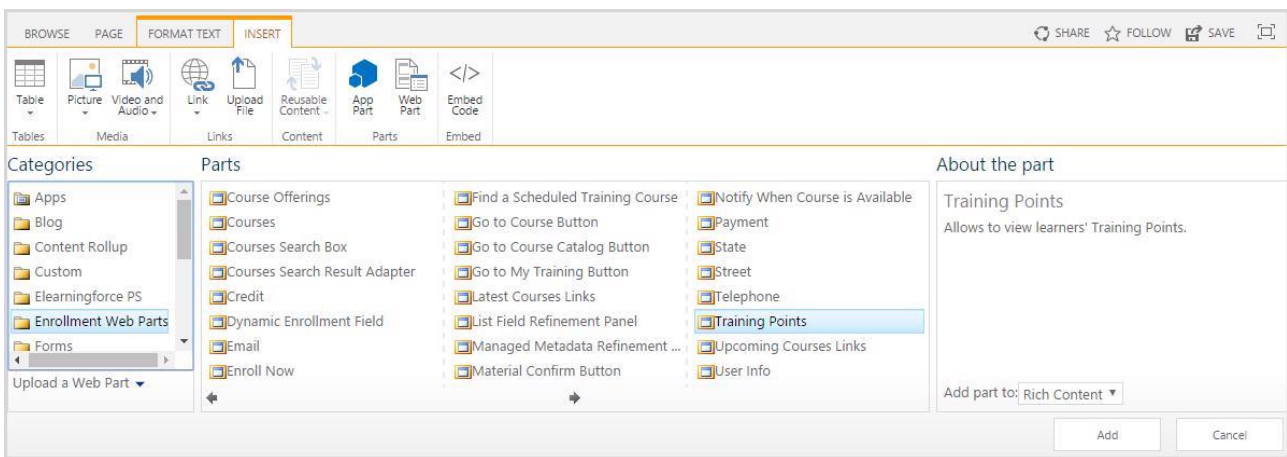
### 4.1.9.3 Training Points

REM Training Points feature allows users to acquire the training points by completing courses. The amount of points is set per REM course (online/classroom/offline) in the course list. To activate the feature, go to Settings > Site Settings > Site Collection Administration > Site Collection Features:

ELEARNINGFORCE - REM: Training Points  
 Provides new Training Points field to the courses list and the web part that allows to view users' Training Points.

The amount of training points per course can be set during [course creation](#) or [course editing](#). To view the amount of training points per course in the Courses list, modify the list view in List Tools. The amount of separate user's training points can be viewed on *Training Points* web part. The web part is available in the web part gallery and is not added to any page by default. To add it to a page, do the following actions:

1. On the needed page go to the ribbon menu Page>Edit>Insert>Web Part;
2. Select the Training Points web part in the Enrollment Web Parts section and click Add:



Web part's UI depends on current user permissions:

- Learner can view only own training points:

### Training Points



Select Period:  -



Course Name	Date Earned	Training Points
<b>▲ Type : Earned</b>		
Computers and Technology Course	4/12/2016	40

Total Training Points planned and earned for the selected period: 40

- For other users people picker is displayed to select the user to see training points of the selected person:

### Training Points

Select User   

Select Period   -  

Course Name	Date Earned	Training Points
<b>▲ Type : Earned</b>		
Computers and Technology Course	10/18/2016	40
classroom training	10/18/2016	40

Total Training Points planned and earned for the selected period: 80

User can select period to view training points for a specific period.

The web part shows points for selected/current user in three tabs: Earned, Planned, and All:

- 1) Earned tab – displays training points from the courses with the “Course Completed” status at the selected period;
- 2) Planned tab – displays training points from the courses with the “Enrolled” and “Waiting For Start Date” statuses at the selected period;
- 3) All tab – displays training points from the courses with the “Course Completed” and “Enrolled” statuses at the selected period.

#### 4.1.9.4 Synchronizing Courses

The Synchronize Courses option allows synchronizing LMS courses with Registration and Enrollment Module courses, updating information the main LMS information, learners enrolled, registration statuses (i.e. certifications granted) etc.

**NOTE:** Courses must be created in REM manually. The Synchronization Job can only update the existing courses, but does not add the new ones.

All the courses updated in LMS concerning Registration and Enrollment Module can be synchronized automatically by Courses Synchronization Timer Job or manually by a user.

**NOTE:** Values of the following fields on the Courses list are synchronized from REM to LMS by receiver (if these fields are editable, i.e. are available on New or Edit forms):

- Title;
- Teachers;
- Published (this field is synchronized only together with Start and End Dates, i.e. when all three fields are editable);
- Description;

- Start Date;
- End Date.

If these fields are not editable, their values (except Teachers field) are synchronized from LMS to REM by ELEARNINGFORCE - REM: Courses Synchronization Job. Title and Organization fields are synchronized from SharePoint LMS to REM by this job as well.

To enable automatic synchronization, make sure the Courses Synchronization timer job is enabled. By default, the courses synchronize automatically once in every 10 minutes. However, you can set another period.

To modify the Synchronization timer job settings, do the following:

1. Go to Central Administration > Monitoring > Check Job Status;
2. Select Courses Synchronization Job for the appropriate Web application. The page will open:

## Edit Timer Job ⓘ

**Job Title**  
ELEARNINGFORCE - REM: Courses Synchronization Job

**Job Description**  
This job synchronizes REM courses with LMS courses

**Job Properties**  
This section lists the properties for this job.

Web application: SharePoint - 80  
Last run time: 3/16/2016 5:30 PM

**Recurring Schedule**  
Use this section to modify the schedule specifying when the timer job will run. Daily, weekly, and monthly schedules also include a window of execution. The timer service will pick a random time within this interval to begin executing the job on each applicable server. This feature is appropriate for high-load jobs which run on multiple servers on the farm. Running this type of job on all the servers simultaneously might place an unreasonable load on the farm. To specify an exact starting time, set the beginning and ending times of the interval to the same value.

This timer job is scheduled to run:

Minutes Every  minute(s)  
 Hourly  
 Daily  
 Weekly  
 Monthly

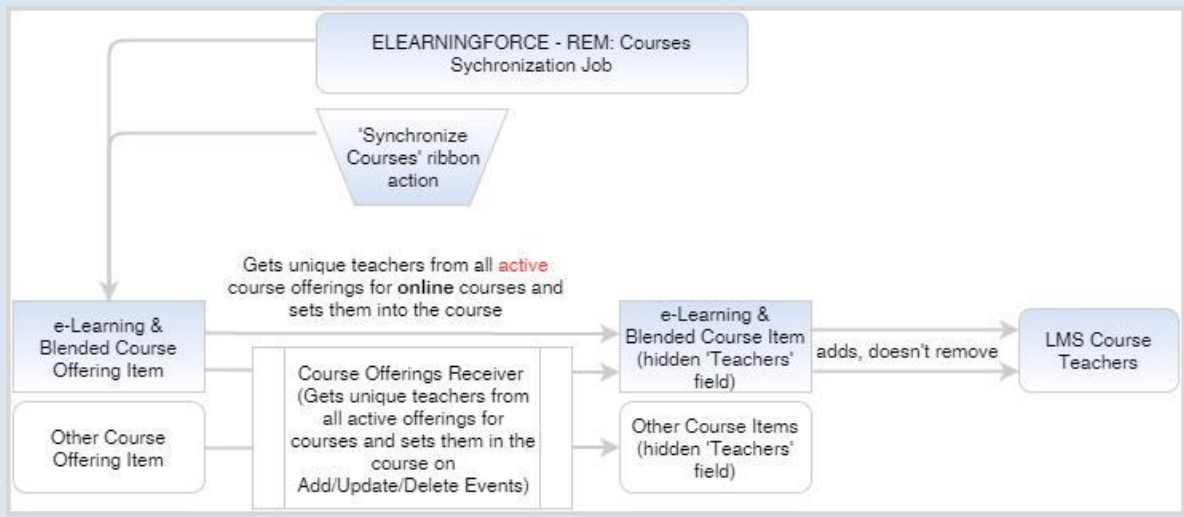
Run Now    Disable    OK    Cancel

3. In the Recurring Schedule section, set the needed time period;
4. If the job is still disabled, click Enable, and then click OK;
5. To synchronize the courses manually, in the Courses section go to Items > Synchronize Courses on the ribbon menu:

Recent		All Items	Course Catalog	Find an item						
✓	📄	Title	Short Description	Teachers	Start Date	Organization	Course Category	Course Status	Has Available Offerings	Published
		New Course	short description text	<input type="checkbox"/> Anna Annaaaa	3/17/2016 12:00 AM		General Employee Training	Active	No	Yes
✓		Hardware Course			3/16/2016 12:00 AM	SharePoint		Active	Yes	Yes
		Software Course			3/16/2016 12:00 AM	SharePoint		Active	Yes	Yes
		Introduction Course			2/8/2016 12:00 AM	SharePoint		Active	Yes	Yes

**NOTE:** Synchronize Courses ribbon action synchronizes only selected courses.

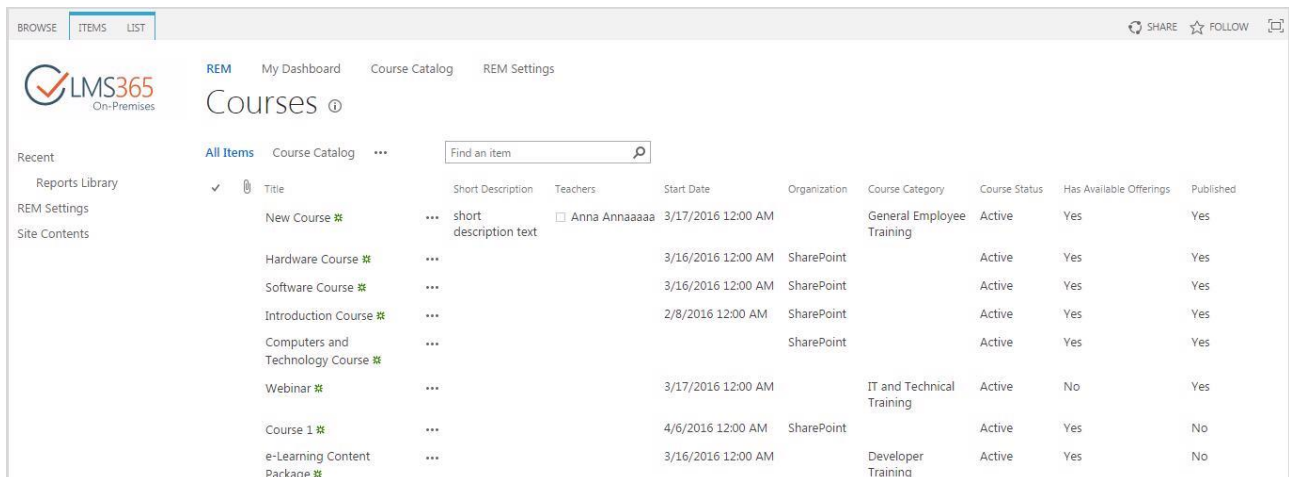
**NOTE:** The following logic is applied for Teachers' synchronization when courses synchronization is checked:



Information about registrations to e-Learning Course Sites is also updated by GradeBook course completion event: when user completes corresponding course in LMS, registration status in REM is instantly changed to 'Course Completed'.

#### 4.1.9.5 Viewing Courses

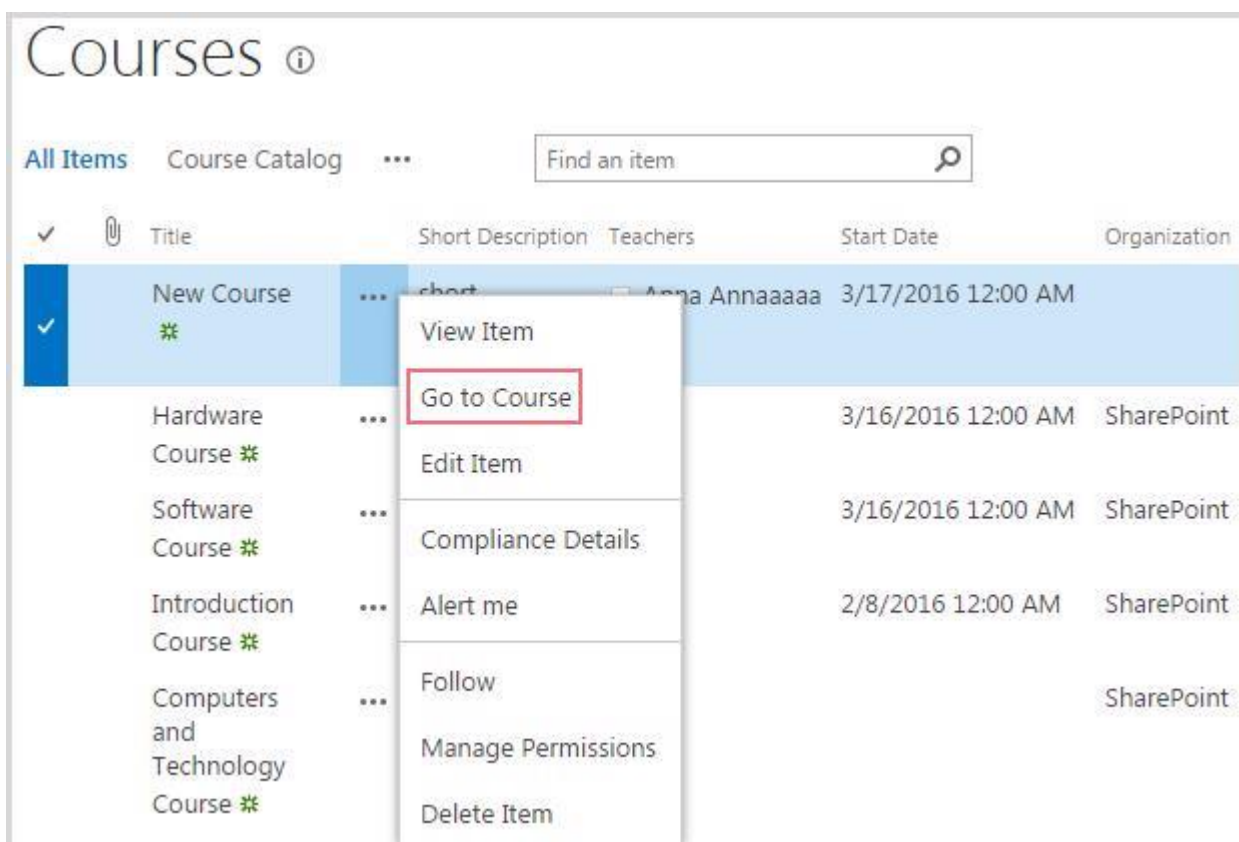
After clicking Courses link on the REM Settings page menu, you can see the courses list:



Title	Short Description	Teachers	Start Date	Organization	Course Category	Course Status	Has Available Offerings	Published
New Course	short description text	Anna Annaaaaa	3/17/2016 12:00 AM		General Employee Training	Active	Yes	Yes
Hardware Course			3/16/2016 12:00 AM	SharePoint		Active	Yes	Yes
Software Course			3/16/2016 12:00 AM	SharePoint		Active	Yes	Yes
Introduction Course			2/8/2016 12:00 AM	SharePoint		Active	Yes	Yes
Computers and Technology Course				SharePoint		Active	Yes	Yes
Webinar			3/17/2016 12:00 AM		IT and Technical Training	Active	No	Yes
Course 1			4/6/2016 12:00 AM	SharePoint		Active	Yes	No
e-Learning Content Package			3/16/2016 12:00 AM		Developer Training	Active	Yes	No

By default, the list contains the following columns: Title, Description, Teachers, Start Date, Organization, Course Category, Course Status, Has Available Offerings (this field shows the presence of Active course offerings with a valid Access Period (Start Date is not later and End Date is not earlier than current date)), Published.

1. To open a certain course page, click the callout menu next to the necessary course and select Go To Course:




2. You will be redirected to a home page of the selected course:

BROWSE PAGE COURSE TOOLS SHARE FOLLOW SYNC

**RICH'S** Food safety training Search this site

My Learning Modules

- Pre-boarding mandatory reading
- Food safety lesson 1
- Food safety lesson 2
- Test and survey



Calendar

January 2016

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
27	28	29	30	31	1	2

Documents

There are no documents in this view.

Assignments

**NOTE:** If you in some way change the value of these fields, all the alterations will be discarded after the next synchronization.

- To view the details of a certain course in the Courses section, click the callout menu next to it course and select View Item from the list (or you can simply click the name of the course):

## Courses

All Items Course Catalog Find an item

✓	Title	Short Description	Teachers	Start Date	Organization
✓	New Course	short	Anna Annaaaaa	3/17/2016 12:00 AM	
	Hardware Course			3/16/2016 12:00 AM	SharePoint
	Software Course			3/16/2016 12:00 AM	SharePoint
	Introduction Course			2/8/2016 12:00 AM	SharePoint
	Computers and Technology Course				SharePoint

View Item

Go to Course

Edit Item

Compliance Details

Alert me

Follow

Manage Permissions

Delete Item



### Courses - Hardware Tutorial

VIEW

  
Edit Item

  
Manage Registrations

  
Manage Offerings

  
Version History

  
Enroll Users

  
Go to Course

  
Send E-mail to Learners

**Manage**

**Actions**

<b>Course Title</b>	Hardware Tutorial
<b>Short Description</b>	
<b>Long Description</b>	Computer hardware engineering is a discipline that combines aspects of both electrical engineering and computer science. Courses in this field are normally taken through a full undergraduate or graduate program.
<b>Course Category</b>	IT and Technical Training
<b>Teachers</b>	
<b>Course Duration</b>	1d 10h
<b>Published</b>	Yes
<b>Start Date</b>	7/19/2016 12:00 AM
<b>End Date</b>	8/10/2016 12:00 AM
<b>Course Image</b>	
<b>Certificates Expiration</b>	Never
<b>Competencies</b>	English-Spoken-Above Average (4)
<b>Training Points</b>	45
<b>Required For Groups</b>	
<b>Recommended For Groups</b>	
<b>Hide Course from Catalog</b>	No
<b>Show link to course site</b>	No
<b>Other Info</b>	
<b>Qualified Teachers</b>	<input type="checkbox"/> Aleksandra Dubrovskaya
<b>Administrators Comments</b>	
<b>Organization</b>	SharePoint
<b>Organization ID</b>	45c593a0-b63c-4c2a-a814-f748dc044a4e
<b>Course ID</b>	33f75750-bb0c-4a0c-9fb0-68b76be73be6
<b>Course Status</b>	Active
<b>Number in Waiting List</b>	0
<b>Number of Enrolled Users</b>	0
<b>Certificates Expiration Mode</b>	0
<b>Certificates Expiration Days After Completed</b>	
<b>Certificates Expiration Date</b>	

Content Type: e-Learning Course Site  
 Created at 7/28/2016 4:50 PM by  ageucheveva\_a  
 Last modified at 7/28/2016 4:53 PM by  ageucheveva\_a

Close

The open detailed course information is similar to the following:

- *Course Title* – name of the course;
- *Short Description* – short description of the course;
- *Course Category* – the REM Course category;
- *Teachers* – users that have teacher’s rights in the course;
- *Course Duration* – the course duration period;
- *Published* – shows if the course is published or not;
- *Start Date* – day the course begins;
- *End Date* – day the course ends;
- *Course Image* – image of the course shown in course catalog;
- *Certificates Expiration* – specifies certificate expiration settings mode;
- *Competencies* – CCM competencies that are granted automatically to the users who complete the course;
- *Training Points* – specifies training points that are gained after course completion;
- *Hide Course from Catalog* – specifies whether the course is hidden from course catalog;
- *Other Info* – additional information about the course;
- *Qualified Teachers* – users that have teacher’s rights in the course;
- *Administrators Comments* – administrators’ remarks concerning the course;
- *Organization* – the course parent organization;
- *Organization ID* – ID of the course parent organization;
- *Course* – ID of the course;
- *Number In Waiting List* – number of learners in the waiting list;
- *Number of Enrolled Users* – number of learners already enrolled to the course (which have registrations with Enrolled and Waiting for Start Date statuses);
- *Certificates Expiration Mode* – either 2, 1 or 0 depending on whether a course expires on certain date, after certain number of days or doesn’t expire;
- *Certificates Expiration Days After Completed* – either empty or shows days after course is completed when certificate becomes expired;
- *Certificates Expiration Date* – either empty or shows date when certificate becomes expired.

The Administrator can carry out the standard SharePoint actions upon a course and enroll new learners.

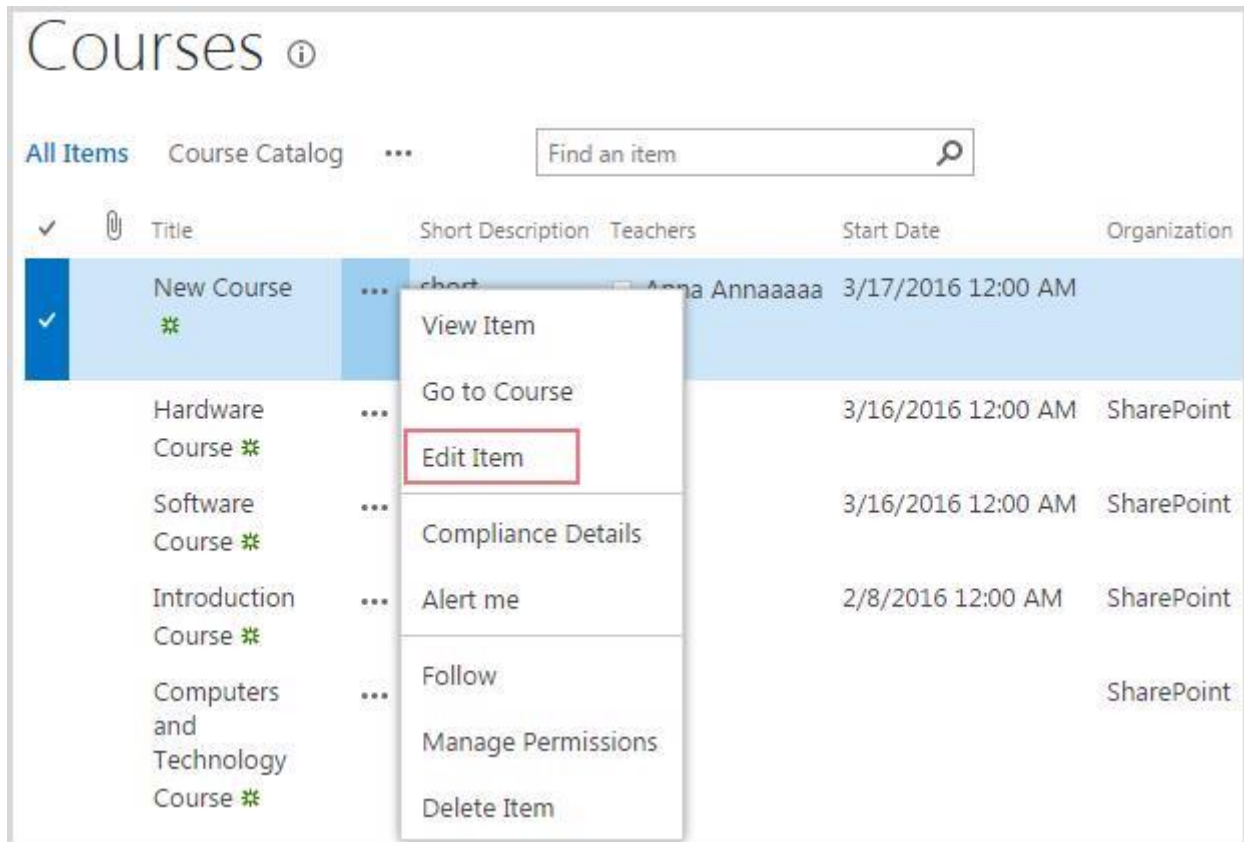
4. Click Close to close the form.

#### 4.1.9.6 *Editing Courses*

To edit the course details, do the following:

1. Go to the Courses section;

2. Click the drop-down arrow next to the needed Course and select Edit Item:



2. In the open window you can edit the following fields (for more information on completing the form, see the [Creating Courses](#) section):

1. *Category;*
2. *Course Duration;*
3. *Long Description;*
4. *Qualified Teachers;*
5. *Other Info;*
6. *Administrator Comments;*
7. *Image Url;*
8. *Required for Groups;*
9. *Recommended for Groups;*
10. *Competencies.*

3. Click Save to save the changes and close the form.

**NOTE:** During the course details editing process Save Conflict may occur and the following error message will be displayed:

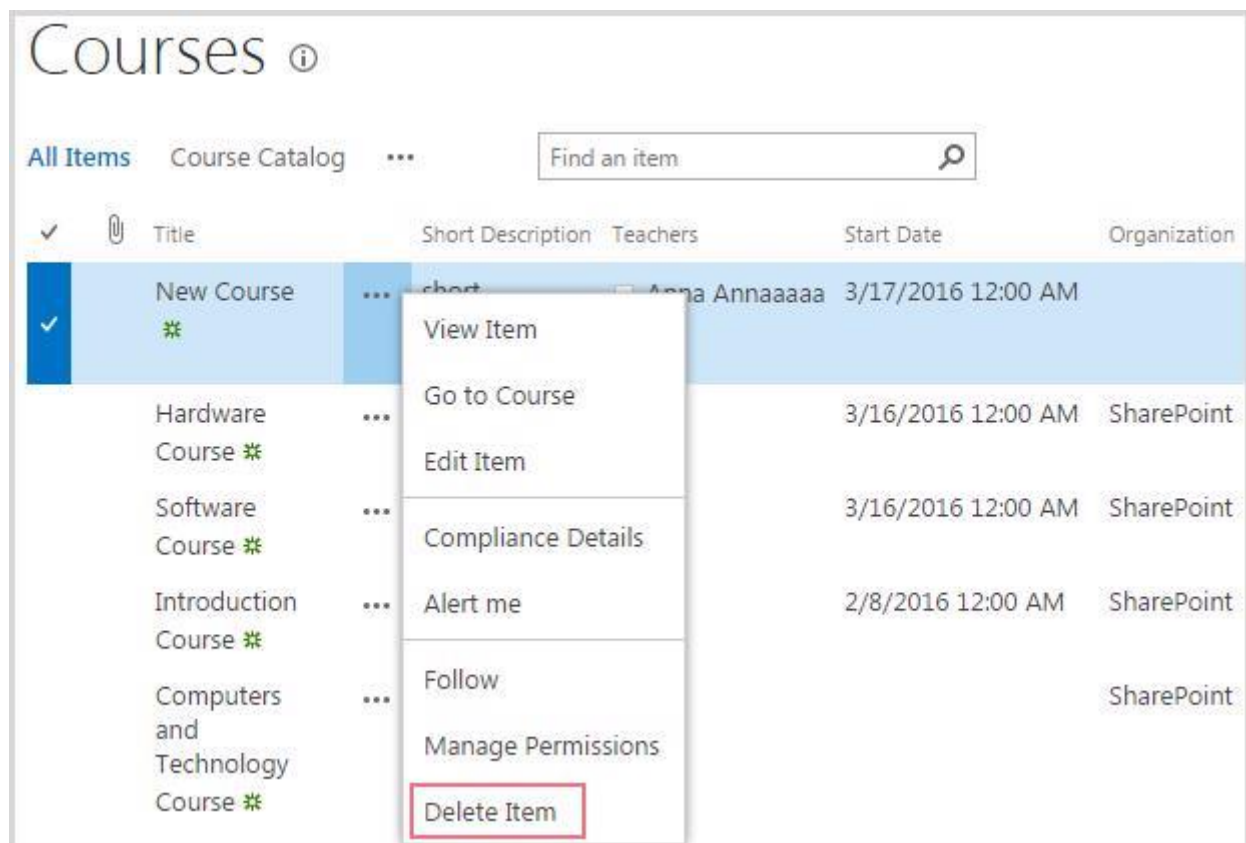
*"Your changes conflict with those made concurrently by another user. If you want your changes to be applied, click Back in your Web browser, refresh the page, and resubmit your changes."*

It is a normal behavior due to the fact that the REM timer job updates the course information every 5 minutes, and if the course is open for editing when the timer job is running updating course details, a user will see save conflict error.

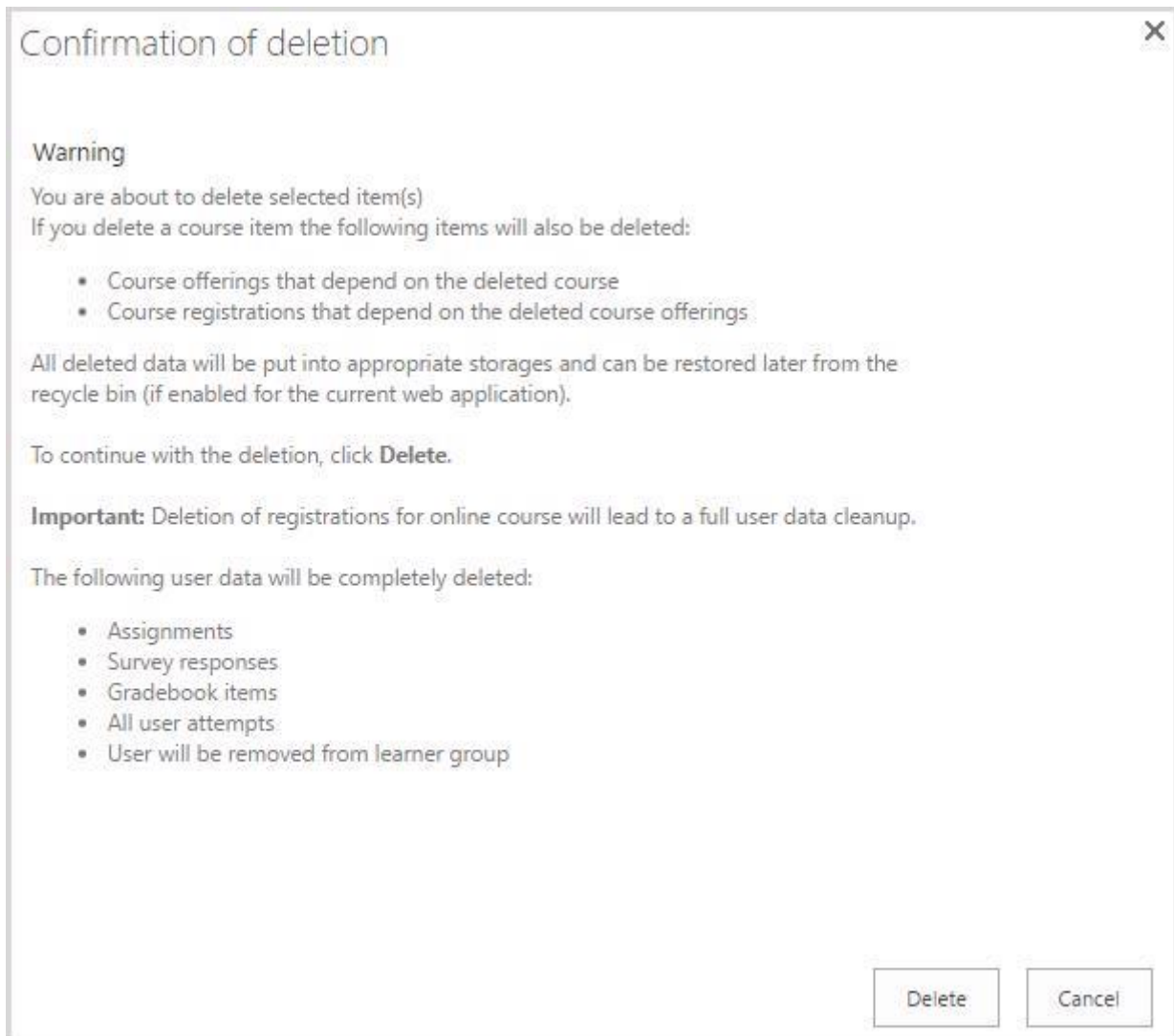
#### 4.1.9.7 Deleting Courses

To delete a course, do the following:

1. Go to the Courses section;
2. Click the drop-down arrow next to the course you want to delete and select Delete Item (or click Delete Item button on the ribbon):



3. After that, you will see a confirmation message with the information about what will be deleted. Pay attention that if you delete online courses, all user's related data will be deleted as well:



4. Click Delete button to confirm the deletion or Cancel button to discard the action.

Go to All Site Content > Deleted Courses to open the storage for deleted courses.

<b>NOTE</b>	When using bulk deletion, Reporting Center records are updated only after synchronization (not by receivers).
<b>NOTE</b>	After a course is deleted from the Organization site collection, it gains the Removed status. By default the courses with such a status are not displayed in the list of courses. To show them in the list, do the following: <ol style="list-style-type: none"> <li>1. Go to List &gt; Modify View on the ribbon menu;</li> <li>2. In the Filter section, select the Show all items in this view option, and then click OK:</li> </ol>

**Filter**

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

Show all items in this view

Show items only when the following is true:

Show the items when column

Course Status

is not equal to

Removed

And  Or

When column

None

is equal to

[Show More Columns...](#)

#### 4.1.9.8 Send E-mail to Learners

The system allows sending E-mail to all Learners enrolled to a course in one go. It is enabled by the **ELEARNINGFORCE – REM: Sending Messages to Course Learners** site feature. To activate the feature, go to Settings > Site Settings > Site Actions > Manage Site Features:

**ELEARNINGFORCE - REM: Sending Messages to Course Learners**  
Provides custom actions and links to send messages to course participants.

After the feature is activated, a new button is added to the Courses list ribbon menu. To use this feature, do the following actions:

1. Go to the Courses list;
2. Select the needed course from the list or open it for view;
3. Click the "Send E-mail to Learners" button in the ribbon menu:

BROWSE ITEMS LIST

NEW COURSE View Item Edit Item Manage Registrations Manage Offerings Delete Item

Enroll Users Go to Course Synchronize Courses Attach File **Send E-mail to Learners**

Recent

Reports Library

REM Settings

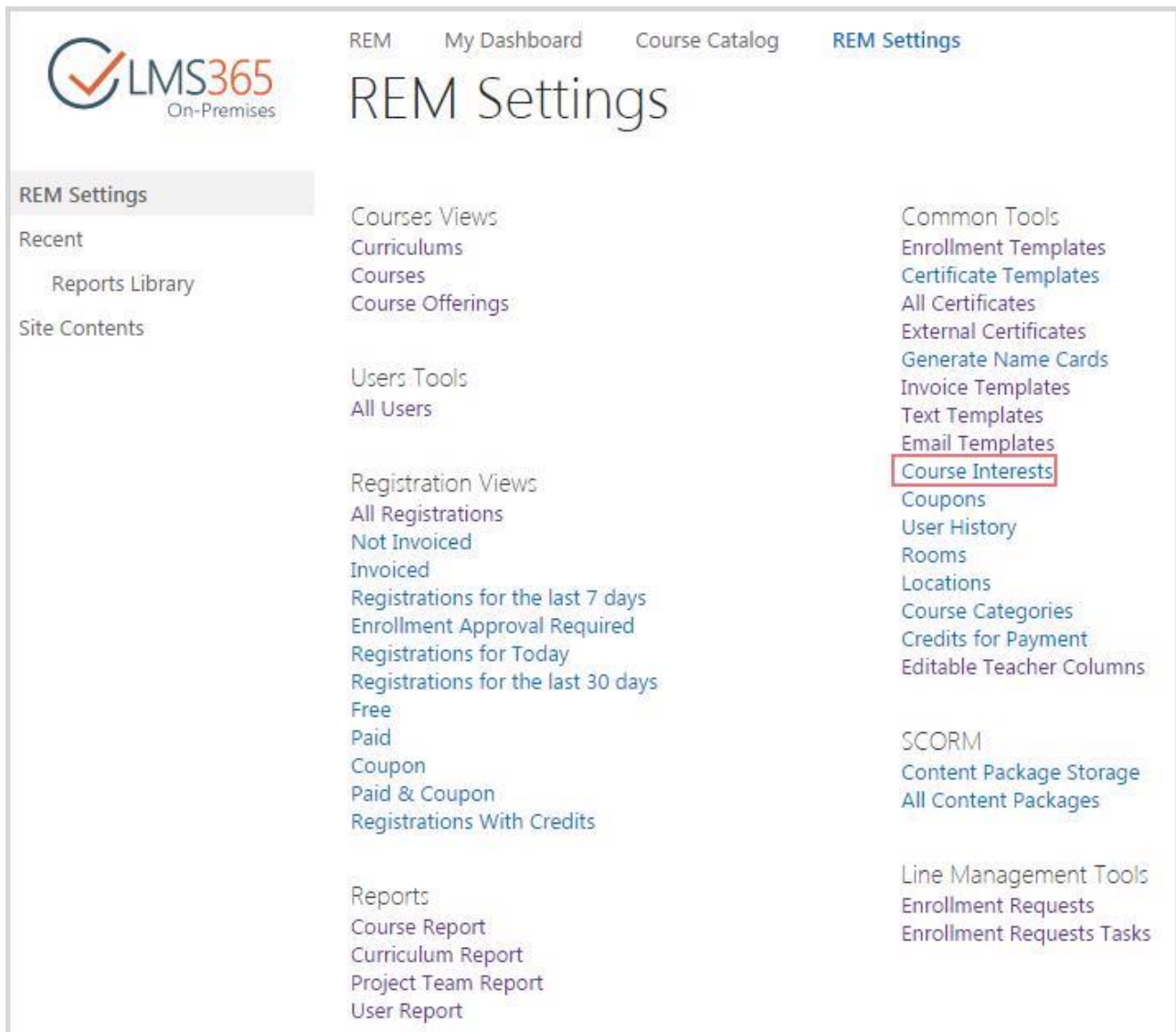
Site Contents

✓	Title	Short Description	Teachers	Start Date	Organization	Course Category	Course Status	Has Available Offerings	Published
	New Course	short description text	<input type="checkbox"/> Anna Annaaaa	3/17/2016 12:00 AM		General Employee Training	Active	No	Yes
✓	Hardware Course			3/16/2016 12:00 AM	SharePoint		Active	Yes	Yes
	Software Course			3/16/2016 12:00 AM	SharePoint		Active	Yes	Yes
	Introduction Course			2/8/2016 12:00 AM	SharePoint		Active	Yes	Yes

4. A new message will be created in the Microsoft Outlook addressed to all Learners of the selected course with the Enrolled status as well as to the Course Teachers. All addressees are added to the Bcc: address field;
5. Type the e-mail subject and body and send the e-mail to all enrolled Learners and Course Teachers.

#### 4.1.9.9 Course Interests

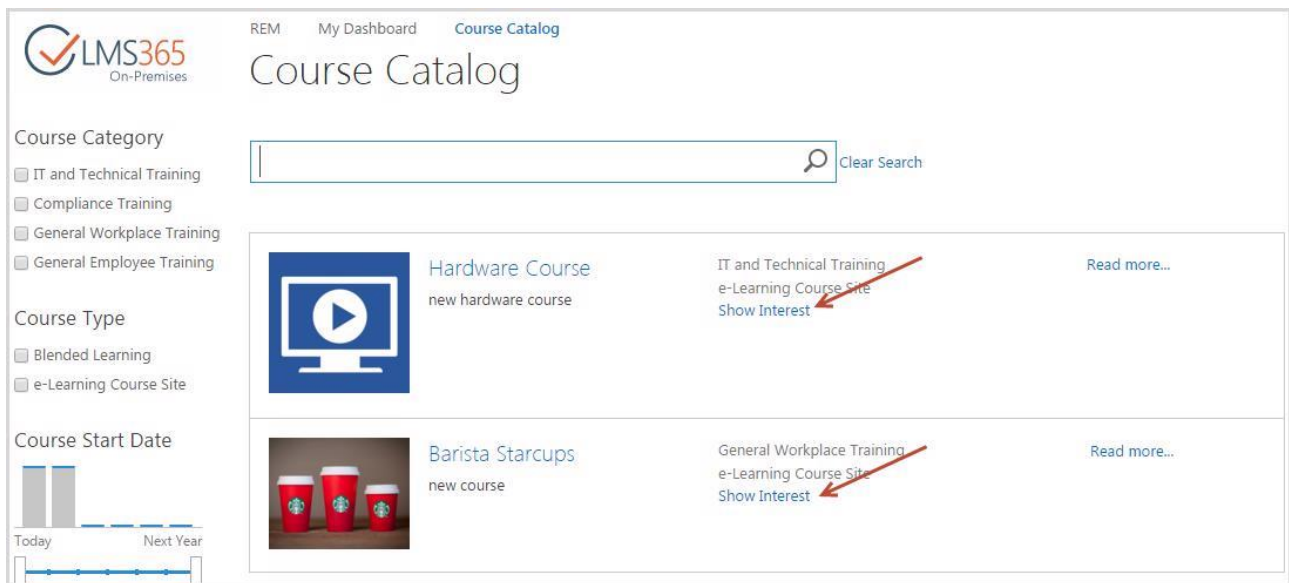
The Course Interest tool helps learners interested in enrolling in any particular course show their interest. For example if there is only course without course offering – showing interest in attending this course may help make the administrators know that there is the demand. When a learner wants to enroll in the course offering that is already full, the showing interest will signalize administrators about enrolling a new learner:



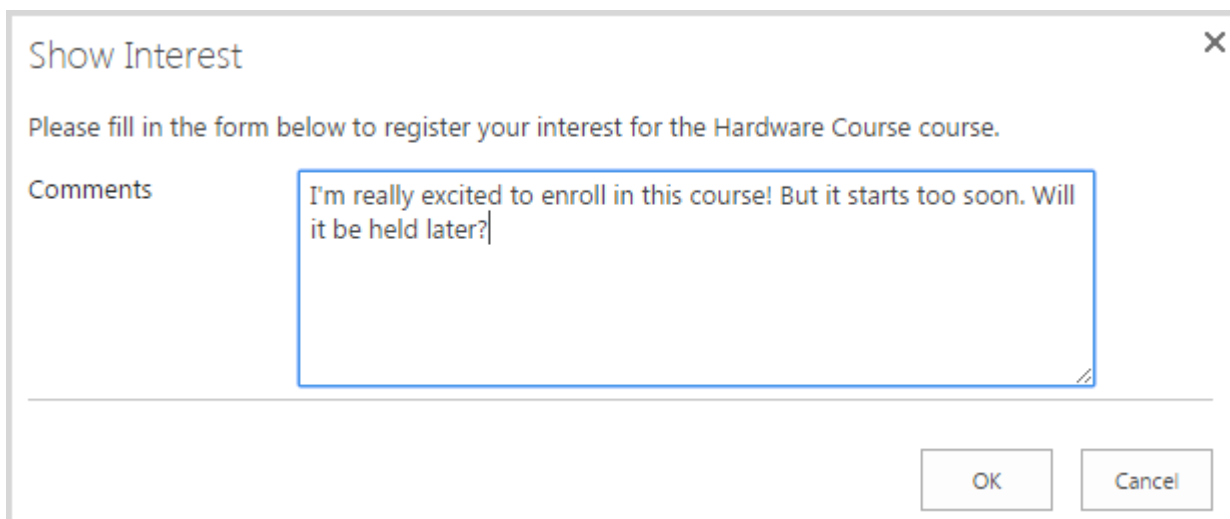
The screenshot shows the LMS365 On-Premises interface. At the top, there are navigation links for REM, My Dashboard, Course Catalog, and REM Settings. The main heading is 'REM Settings'. On the left, there is a sidebar with 'REM Settings' selected, and sub-sections for 'Recent', 'Reports Library', and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

- Courses Views:** Curriculums, Courses, Course Offerings
- 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** (highlighted), 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

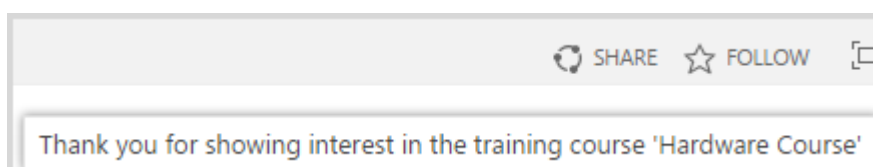
The 'Show Interest' link is displayed in the Course Catalog section:



When user clicks 'Show Interest' link the following form appears to explain the interest in the Comments section:

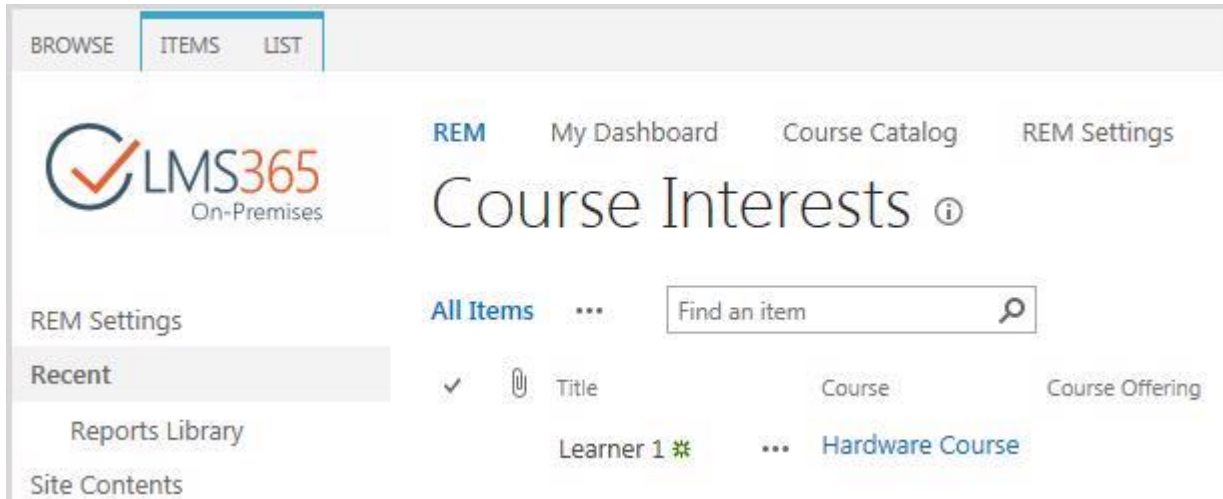


A confirmation message is displayed to notify that your comment has been recorded:



Teacher can view Learners' comments in the Course Interests section:





To hide the link from the Course Catalog, you need to perform the following steps:

1. Open Site Settings page on the REM host, go to Master pages and page layouts > Display Templates > Search;
2. Find Item\_CourseCatalog.html file and download a copy;
3. Open the file in Notepad;
4. Delete the following text:

```
<!--#_
        if (!lms2rea.IsAnonymous)
        {
            _#-->
            <div>
                <a href="#" ShowInterestUrl =#_
onclick="javascript:lms2rea.OpenShowInterest('_#= ShowInterestUrl =#_',
'_#= ShowInterestConfirmMessage =#_'); return false;"
title="#"_#=ctx.CurrentItem.REMCFTitle=#_">
                    <span>_#=REMCourseItemResx.ShowInterest=#_</span>
                </a>
            </div>
            <!--#_
        }
        _#-->
```

5. Save the file and upload it to the gallery.

#### 4.1.9.9.1 Enrolling Users from Course Interests List

All Learners' Course Interests are displayed in the Course Interests list:

BROWSE ITEMS LIST

REM My Dashboard Course Catalog REM Settings

# Course Interests ⓘ

REM Settings

Recent

Reports Library

Site Contents

All Items ... Find an item 🔍

✓	📎	Title	Course
		Learner 1 🌿	... Hardware Course
		Learner 2 🌿	... Hardware Course
		Learner 3 🌿	... Computers and Technology Course
		Learner 3 🌿	... Software Course (new)

You can view learner's comment by clicking the Course Interest title:

## Course Interests - Learner 1

VIEW

**Manage**

- Edit Item
- Delete Item

**Actions**

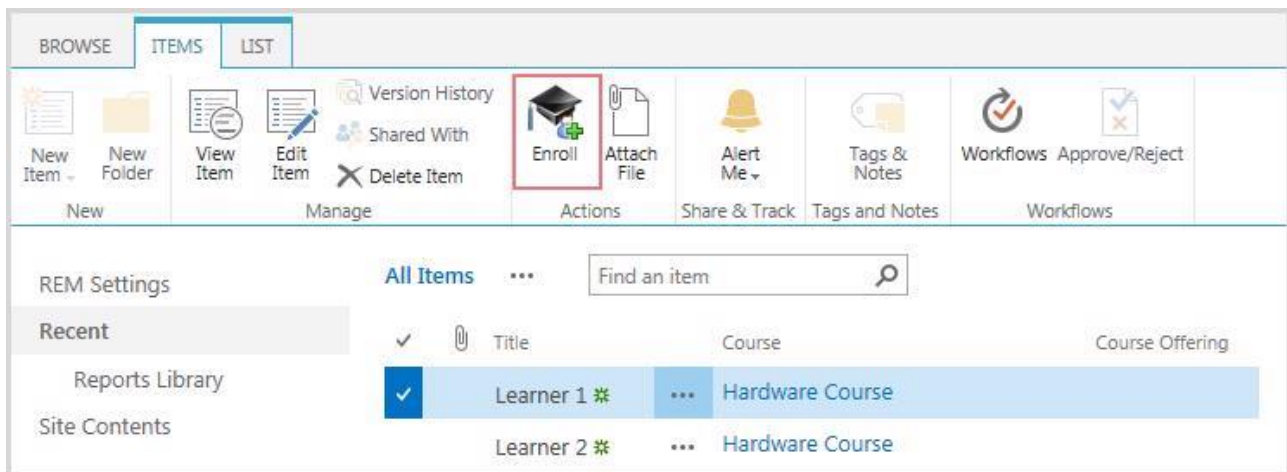
- Version History
- Shared With
- Alert Me
- Workflows

Title	Learner 1
User	<input type="checkbox"/> Learner 1
Course	<a href="#">Hardware Course</a>
Status	Pending
Comments	I'm really excited to enroll in this course! But it starts too soon. Will it be held later?

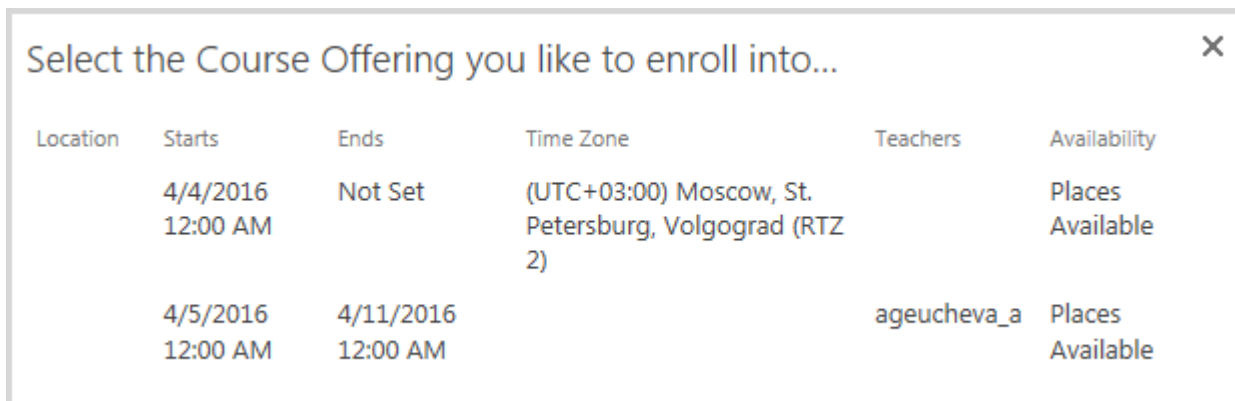
Created at 4/1/2016 3:37 PM by  System Account  
 Last modified at 4/1/2016 3:37 PM by  System Account

Close

To enroll user select a Course Interest item and click 'Enroll' button in the ribbon menu:



If several Course Offerings are available, you will be suggested to select one:



After selection or if only one Course Offering is available for the course, a [user enrollment form](#) will open:

### Enroll in - Course 1 ✕

---

**User Information**

Add Multiple Users

▶ Create New Users

Login Name:\*

  
 Email: \*  
  
 First Name: \*  
  
 Last Name: \*  
  

Login Name    First Name    Last Name    Email

▶ Select existing users to enroll

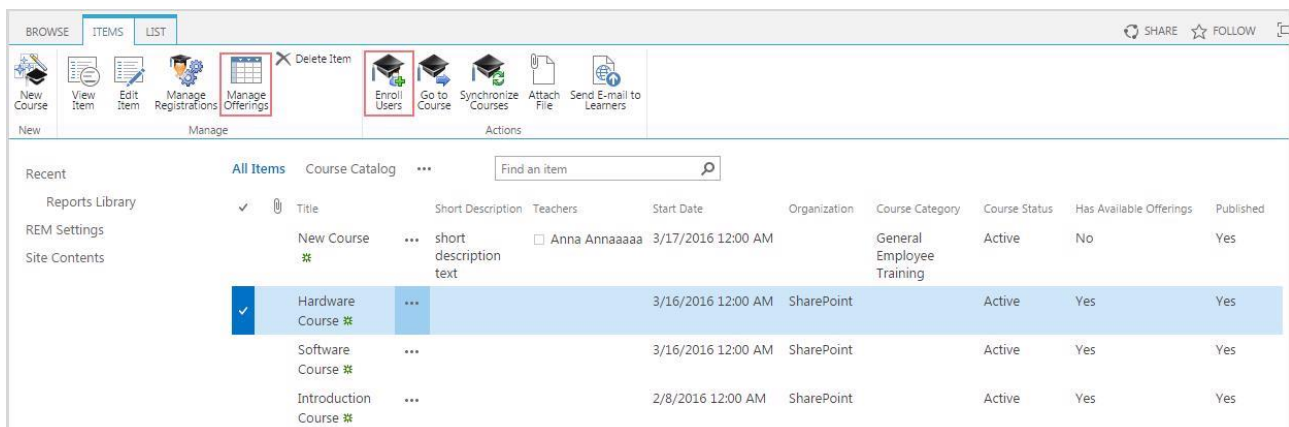
Learner 2:

Accept  Terms and Conditions

#### 4.1.9.10 Enrolling Users from Courses list

To enroll a new user from the Courses section, do the following:

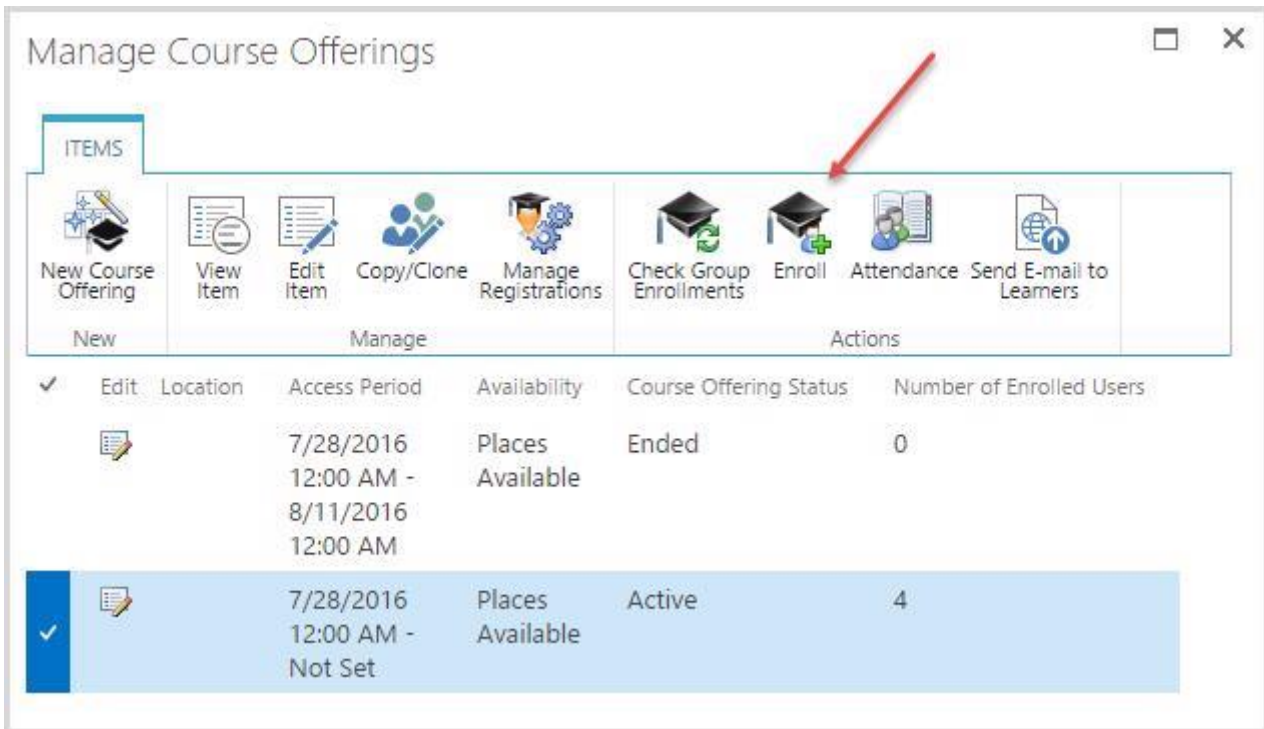
1. Go to the Courses section;
2. Select the needed course, and then select Items > Manage Offerings or Enroll Users from the ribbon menu:



The screenshot shows the LMS365 interface with the 'ITEMS' tab selected. The ribbon contains several options, with 'Enroll Users' highlighted. Below the ribbon is a table of course offerings.

Recent	All Items	Course Catalog	Find an item								
	✓	📄	Title	Short Description	Teachers	Start Date	Organization	Course Category	Course Status	Has Available Offerings	Published
Reports Library			New Course	short description text	☐ Anna Annaaaa	3/17/2016 12:00 AM		General Employee Training	Active	No	Yes
REM Settings	✓		Hardware Course			3/16/2016 12:00 AM	SharePoint		Active	Yes	Yes
Site Contents			Software Course			3/16/2016 12:00 AM	SharePoint		Active	Yes	Yes
			Introduction Course			2/8/2016 12:00 AM	SharePoint		Active	Yes	Yes

3. Select the needed Course Offering from available and click 'Enroll' in the ribbon menu:



4. You will be redirected to the Enrollment form. Complete the open form as described [below](#).

#### 4.1.9.11 All Content Packages

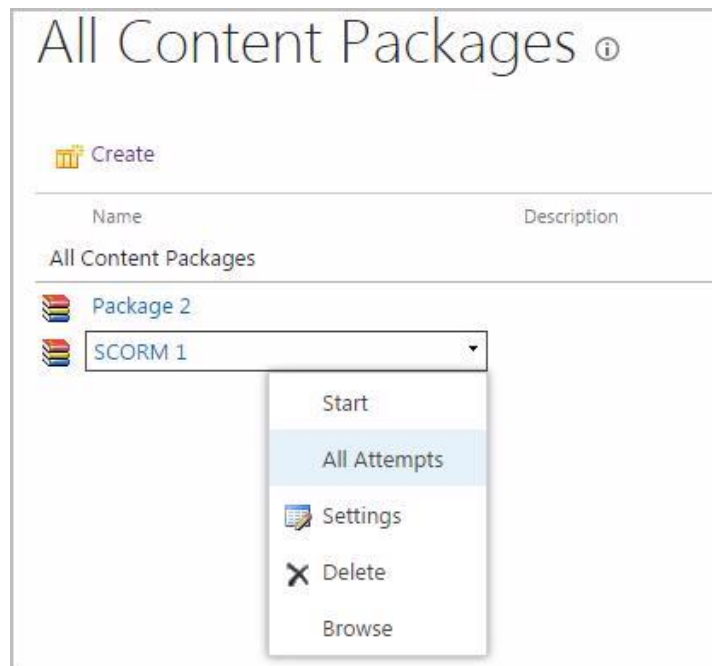
To View all Content Packages and all Learner's attempts, go to REM Settings > All Content Packages:

The list of all Content Packages uploaded to this REM will be displayed:

Name	Description	Total Attempts	Last Modified
All Content Packages			
Introduction		0	6 weeks ago
SCORM		2	7 weeks ago
SCORM1		0	6 weeks ago

To upload a new Content Packages for later use click Create link and follow the instructions described [above](#).

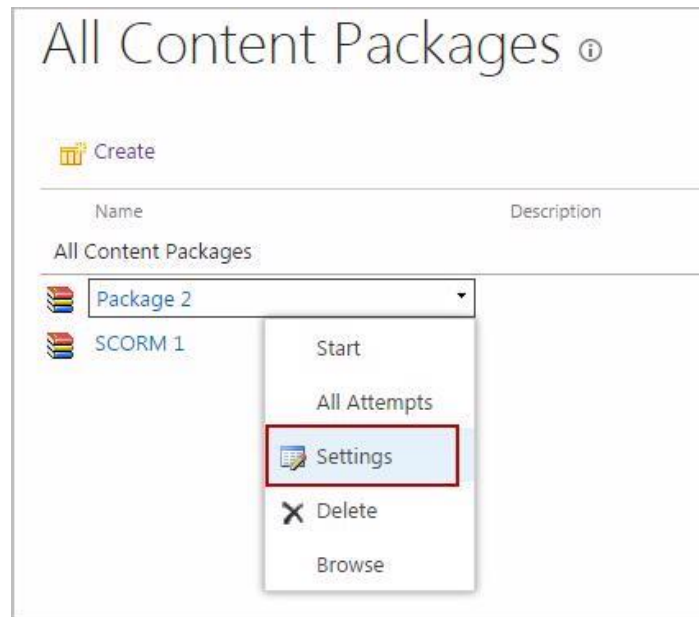
To view all attempts of a package, select the package and click All Attempts in the drop-down menu:



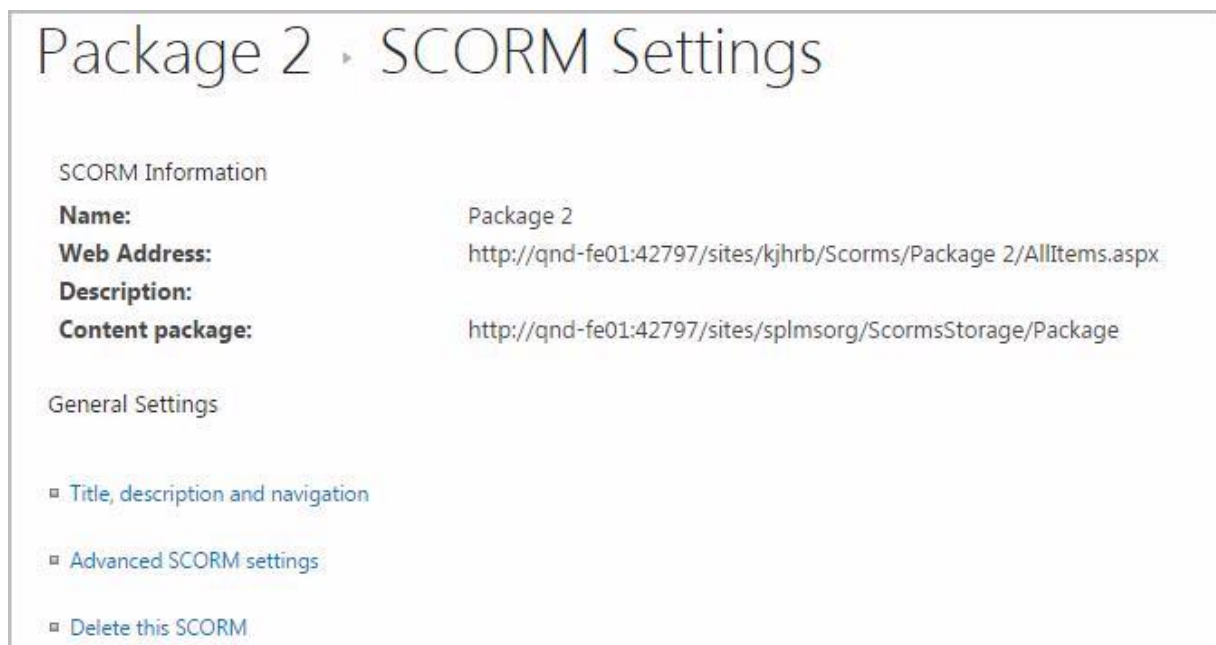
A list of all Learners' attempts will be displayed:

SCORM 1					
<input type="checkbox"/>	Title	<input type="checkbox"/> Created By	Completion Status	Success Status	Points
<input type="checkbox"/>	Attempt #1 <small>NEW</small>	<input type="checkbox"/> Learner 1	No	No	33
<input type="checkbox"/>	Attempt #2 <small>NEW</small>	<input type="checkbox"/> Learner 1	Yes	Yes	100
<a href="#">+ Add new item</a>					

To edit settings of existing package select the package and click Edit in the drop-down menu:

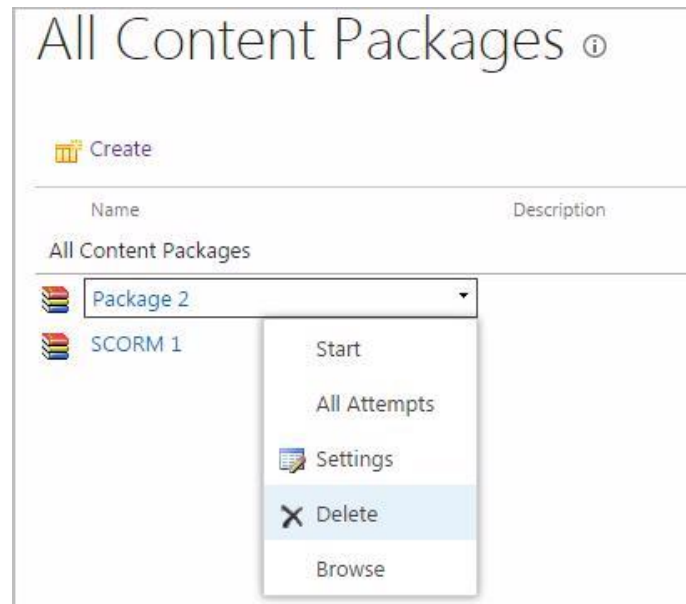


On the Settings page, you can change Title, description and navigation and Advanced SCORM settings:

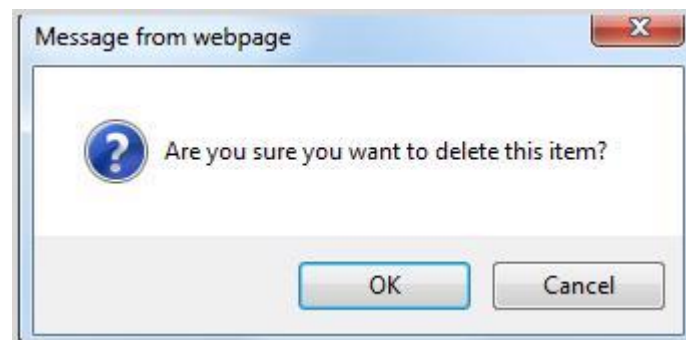


To delete a Content Package, select the package and click Delete in the drop-down menu:





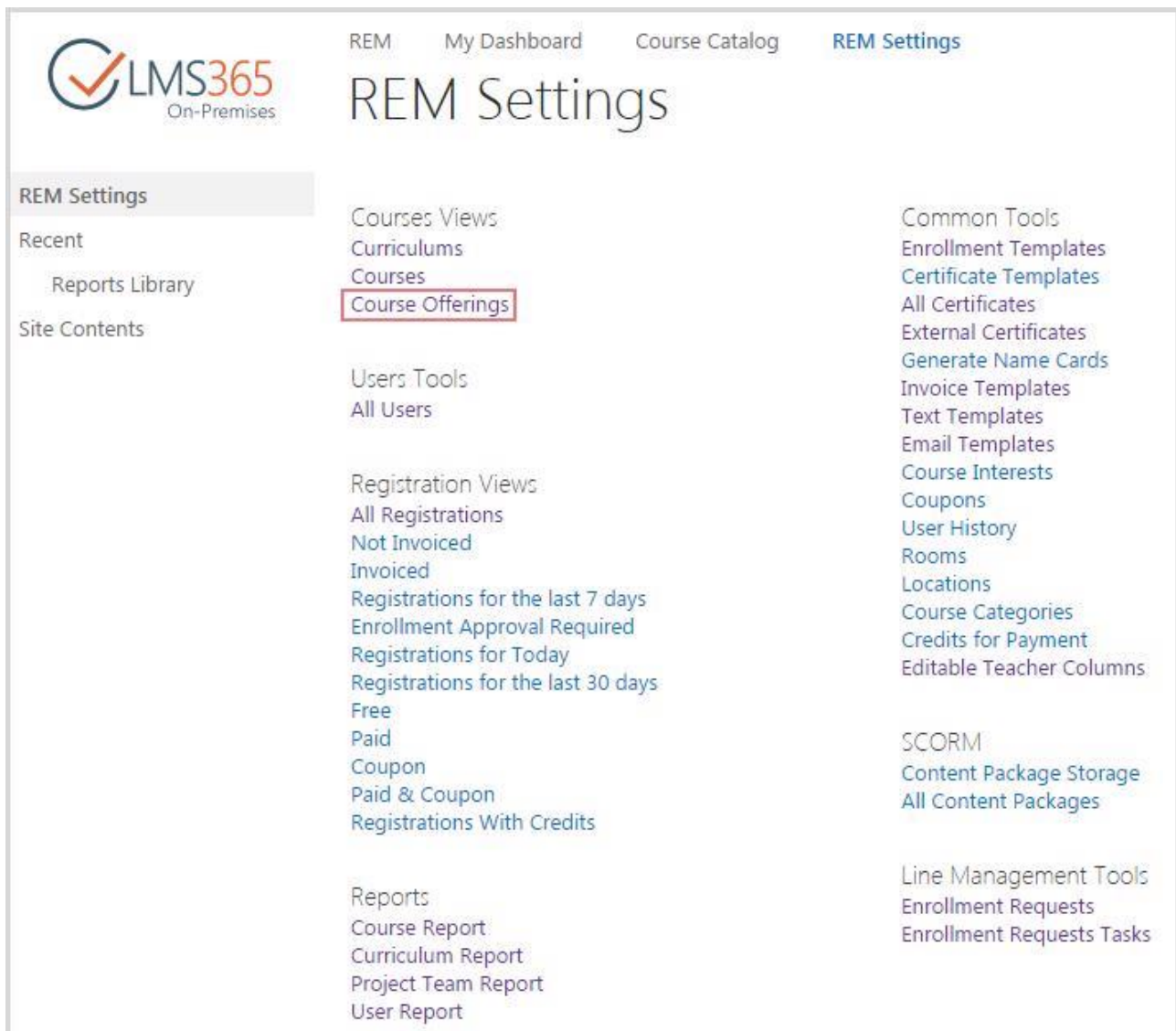
The following message will appear:



Click OK button to confirm the deletion or Cancel button to discard the process.

#### 4.1.10 Course Offerings Management

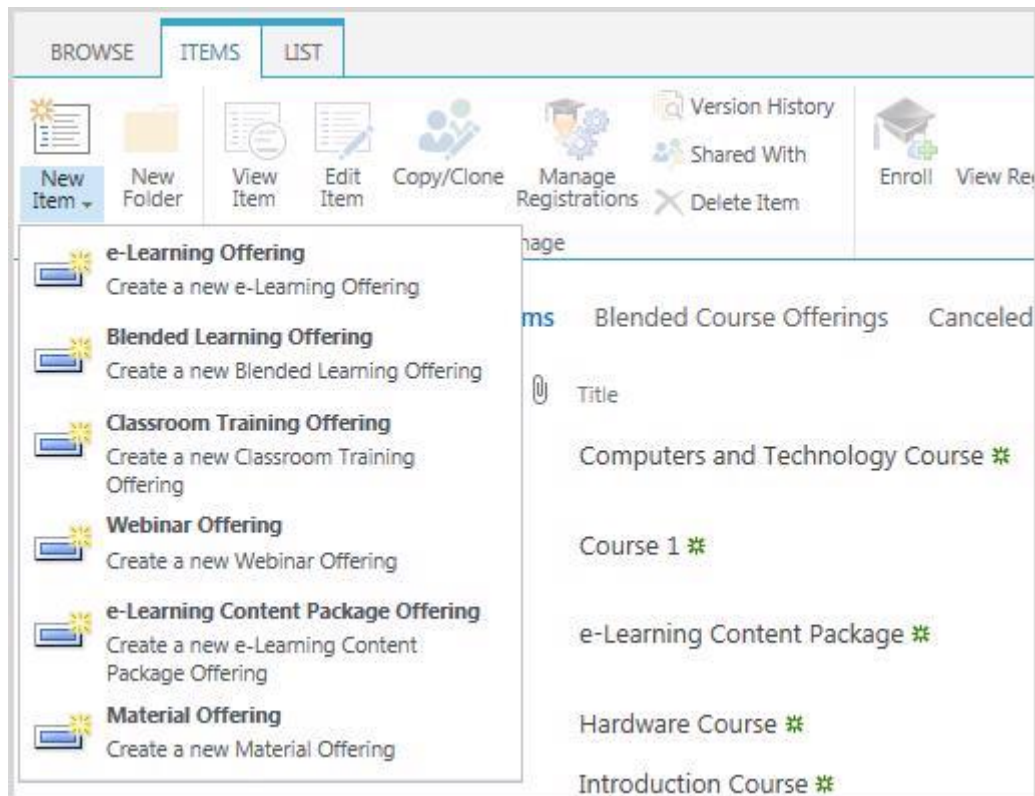
REM Course Offering represents a certain offer of the existing REM Course. Each Course Offering can be intended for different Locations and can have different access or registration periods. First users need to create a REM Course and only then create a Course Offering:



#### 4.1.10.1 *Creating Course Offerings*

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 Cancel Paste Cut Copy Attach File Spelling

Commit Clipboard Actions Spelling

Course \* Introduction 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 3/16/2016  To 4/16/2016 



Registration Period \*  Date Range

From   To  

No Limit

[Advanced Settings](#)



Save Cancel

- *Course* – type the name of the 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 LMS organization;

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

- *Enrollment Template* – specify the template from the drop-down list;
- *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;

**NOTE:** For Course Offerings created for Blended Learning and Classroom Training it is possible to set Time besides dates. To add it activate the web-scoped hidden feature “LMS2REA\_CourseOfferingAccessPeriod”. The time will be displayed using Regional Settings set on user’s computer:

Access Period \* From   12 AM ▼ 00 ▼ To   12 AM ▼ 00 ▼

- *Registration Period* – specify the dates when learners can enroll in the course;


In the Advanced settings section specify:

**Advanced Settings**

Time Zone: (UTC+03:00) Baghdad ▼

Minimum number of Learners:



Maximum number of Learners:



Due Date:
   
 Never
   
 Days after enrollment 
  
 Date   12 AM ▼ 00 ▼



Auto Recertification:

Days Prior to Certificate Expiration: 
  
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.  

- *Time Zone* – specify the course area time zone;
- *Minimum number of Learners* - specify the minimal number of learners for this course to be started;

**NOTE:** If the Min. Learners Number is not scored, the Administrator will receive the system notification, that the course is canceled. However, the Administrator can ignore this notification.

- *Maximum number of Learners* – specify 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](#);
- *Due Date* – set date when course must be completed:
  - Never – select this option to set no due date;
  - Days after enrollment – select this option to set the number of days, after which the due date comes;
  - Date – select this option and set the fixed due date and time (by default, 12 AM is set);

<b>NOTE</b> :	Time picker displaying depends on <i>DisableTimeValueForCourseTypes</i> parameter set in REM4Configuration.xml file.
<b>NOTE</b> :	<p>For Material course type, default Due Date value is set to 14 Days after enrollment:</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>Due Date</p> <p> <input type="radio"/> Never           <input checked="" type="radio"/> Days after enrollment <input style="width: 50px;" type="text" value="14"/> <input type="radio"/> Date <input style="width: 150px;" type="text"/> <input type="calendar"/> 12 AM ▾ 00 ▾         </p> </div> <p>For Classroom and Webinar course types, this field is hidden and default value is set to 'Never'.</p>
<b>NOTE</b> :	If in the Enrollment Template 'Send overdue email reminder to' option is specified, users who are selected in it will receive overdue reminder if Due Date is set. If no Due Date is set, overdue reminder will not be sent to any user role.
<b>NOTE</b> :	When site collection administrator, LMS Administrator or teacher enroll learners into a course offering with set due date, they can change it in the Due Date field (learners and managers do not see this field):

Enroll in - Hardware & System Requirements Course ✕



---


**User Information**

User Information  Add Multiple Users



▶ Select existing users to enroll

Anna Ageucheva

Due Date  

Accept   
[Terms and Conditions](#)

- *Teachers* – specify the name of the instructors for this course, and then click the Check Names  button OR use the Browse  button to find the needed names. In this field only people specified as Qualified Teachers in the parent course can be chosen. If no one is specified in Qualified Teachers field in the parent course, any user can be chosen in Teacher Picker. If you try to select user that is not set in Qualified Teachers field, you will see the following message:

Teachers \*

K\_Teacher2

The selected user is not part of the "qualified teachers" for this course.

- *Auto Recertification* – select this option to enable auto recertification (option is unchecked by default);
  - *Days Prior to Certificate Expiration* – set number of days before certificate expiration on which user will be auto enrolled in course offering (if Auto Recertification option is checked, a registration to course offering is created automatically at selected date);

**NOTE:** This field is active only after ELEARNINGFORCE – REM: Certificates Expiration feature activation.

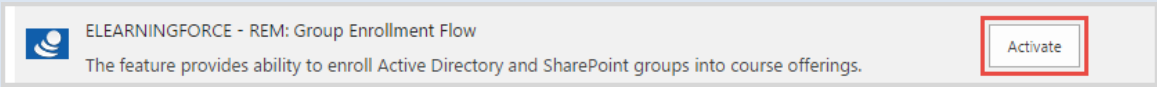
- *Course Offering Status* – select from the drop-down list Active or In Planning status;

**NOTE:** Course Offering status is visible only on Creation form.

- *Required for Groups* – specify the AD or SP groups this course offering will be visible for. This course offering will be required for all users belonging to the specified group. The field is available only if '[REM: Course Targeting](#)' feature is activated;
- *Recommended for Groups* - specify the AD or SP groups this course offering will be visible for. All users belonging to the specified group will be recommended this course offering. The field is available only if '[REM: Course Targeting](#)' feature is activated;
- *Groups to Enroll* – specify AD or SP groups for forced enrollment into this Course Offering. All members of the specified group will be enrolled in the Course Offering.

**NOTE:** 'Groups to Enroll' field is displayed only when ELEARNINGFORCE – REM: Group Enrollment Flow site collection feature is activated. To activate it, do the following:

1. On the REM welcome page, go to the Settings >Site Settings section;
2. Go to the Site Collection Administration>Site collection features section;
3. Activate the site collection feature:



5. Click Save to add the new Course Offering.

Depending on Course Type, Course Offering creation form has some different fields:

- *For e-Learning and Blended Course Offerings:*

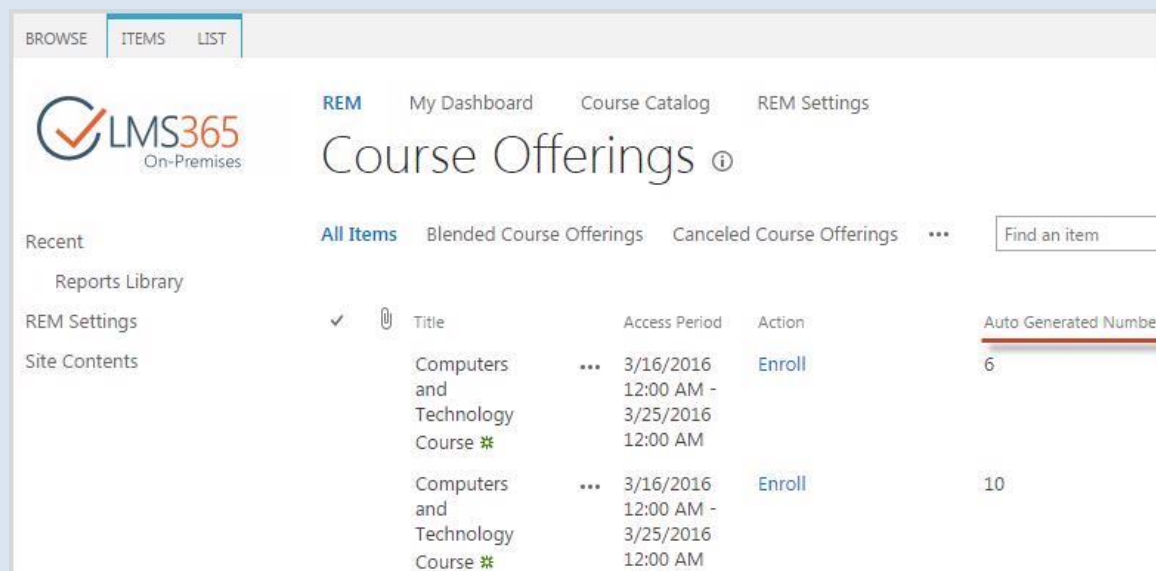


- *SharePoint LMS Learner Group* – specify the user group for this offering or create a new one;

**NOTE:** *Create a new group* option is checked by default. The text box for group name should contain the default group name template. Placeholder AUTONUMBER will be replaced by integer number. The number is unique for each course offering.



The new field *Auto Generated Number* can be added to the course offering list by modifying list view. This field is read-only and is changed by system only (during creation of the course offering). The field stores the auto generated number that is used for Learners group name:

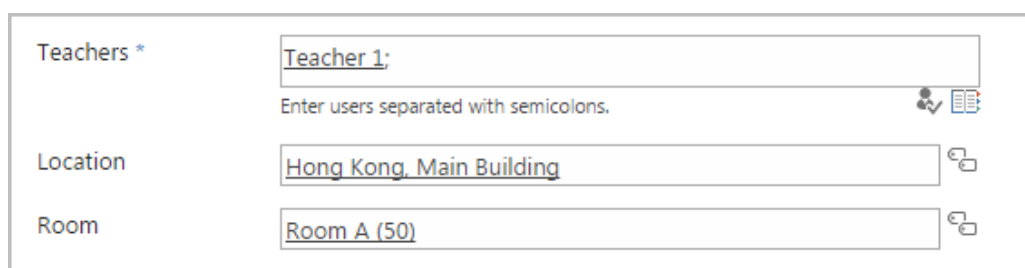


The screenshot shows the 'Course Offerings' page in the LMS365 interface. The page has a navigation bar with 'BROWSE', 'ITEMS', and 'LIST' tabs. Below the navigation bar, there are links for 'REM', 'My Dashboard', 'Course Catalog', and 'REM Settings'. The main heading is 'Course Offerings'. There are tabs for 'All Items', 'Blended Course Offerings', and 'Canceled Course Offerings', along with a search box labeled 'Find an item'. On the left, there is a 'Recent' section with 'Reports Library' and 'Site Contents'. The main content is a table with the following columns: 'Title', 'Access Period', 'Action', and 'Auto Generated Number'. The table contains two rows of course offerings.

Title	Access Period	Action	Auto Generated Number
Computers and Technology Course #	3/16/2016 12:00 AM - 3/25/2016 12:00 AM	Enroll	6
Computers and Technology Course #	3/16/2016 12:00 AM - 3/25/2016 12:00 AM	Enroll	10

**NOTE:** Users chosen as Teachers for e-Learning and Blended Course Offerings are automatically added to the REM and LMS Teachers group. It means that these users will be displayed in Course Teachers field in the corresponding REM course and will be added as Teachers to the related LMS Course. This is one-way synchronization, teachers are only added to LMS course site by this functionality, but never deleted.

- *For Blended Learning and Classroom Training Offerings:*

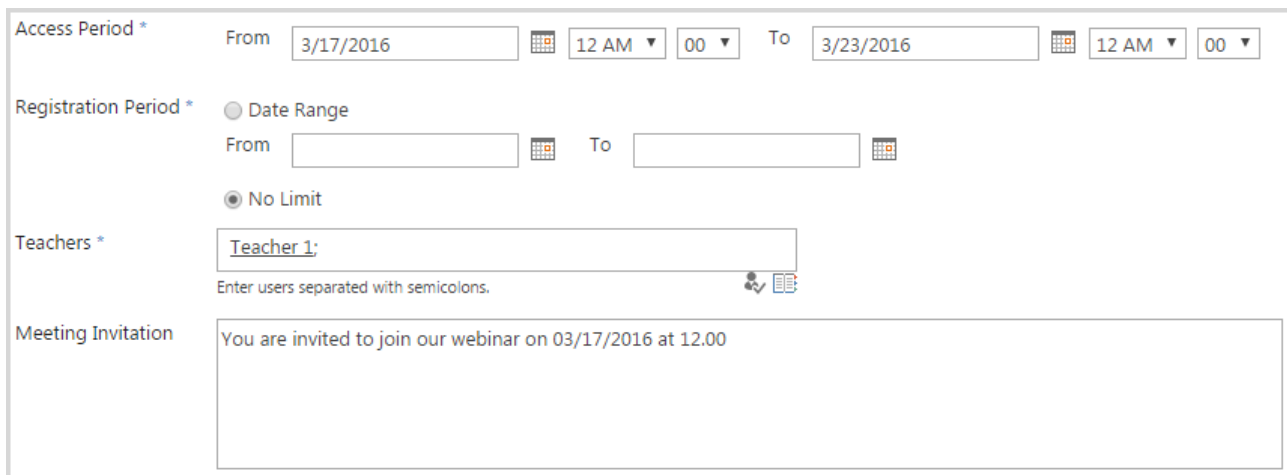


The screenshot shows a form with three input fields. The first field is labeled 'Teachers \*' and contains the text 'Teacher 1:'. Below it is a note: 'Enter users separated with semicolons.' and a 'Check Names' button. The second field is labeled 'Location' and contains the text 'Hong Kong, Main Building'. The third field is labeled 'Room' and contains the text 'Room A (50)'. Each field has a 'Browse' button to its right.

- *Teachers* - type the name of the instructors for this course, and then click the Check Names (👤) button OR use the Browse (🔍) button to find the needed names. In this field only people specified as Qualified Teachers in the parent course can be chosen. If no one is specified in Qualified Teachers field in the parent course, any user can be chosen in Teacher Picker;

- *Location* – specify the course location. Users can create several course offerings for one course held in different locations (i.e. different countries, cities, etc);
- *Room* - type the name of the room where this course will be held, and then click the Check Names (👤) button OR use the Browse (📅) button to find the room; this can be any room from the [Rooms](#) list. This course will not be associated with any LMS course;

- *For Webinar Offerings:*



The screenshot shows a configuration form for a webinar offering. It includes the following sections:

- Access Period \***: From 3/17/2016 12 AM 00 To 3/23/2016 12 AM 00
- Registration Period \***:
  - Date Range: From [ ] To [ ]
  - No Limit
- Teachers \***: Teacher 1; (with a note: Enter users separated with semicolons.)
- Meeting Invitation**: You are invited to join our webinar on 03/17/2016 at 12.00

- *Access Period* – specify the dates and time when learners can access the course;
- *Meeting Invitation* – enter text of invitation that learners will receive to join the meeting.

Required, Recommended and Groups to enroll fields are not available in the Additional settings. If Paid enrollment template is selected, fields for Tuition and Currency appear:




The screenshot shows two fields for a paid enrollment template:

- Tuition**: 50
- Currency**: USD (US dollar)

- *Tuition* – type the course payment sum;
- *Currency* – specify the tuition currency;

- *For Material Offerings:*

Course Materials  [Hardware and System Requirements.pdf](#)

**Advanced Settings**

Time Zone: (UTC+03:00) Baghdad

Minimum number of Learners: 2

Maximum number of Learners: 6

Teachers: Anna Ageucheva  
Enter users separated with semicolons.

E-Signature: Simple Check Box

Auto Recertification:

Days Prior to Certificate Expiration: 5  
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.

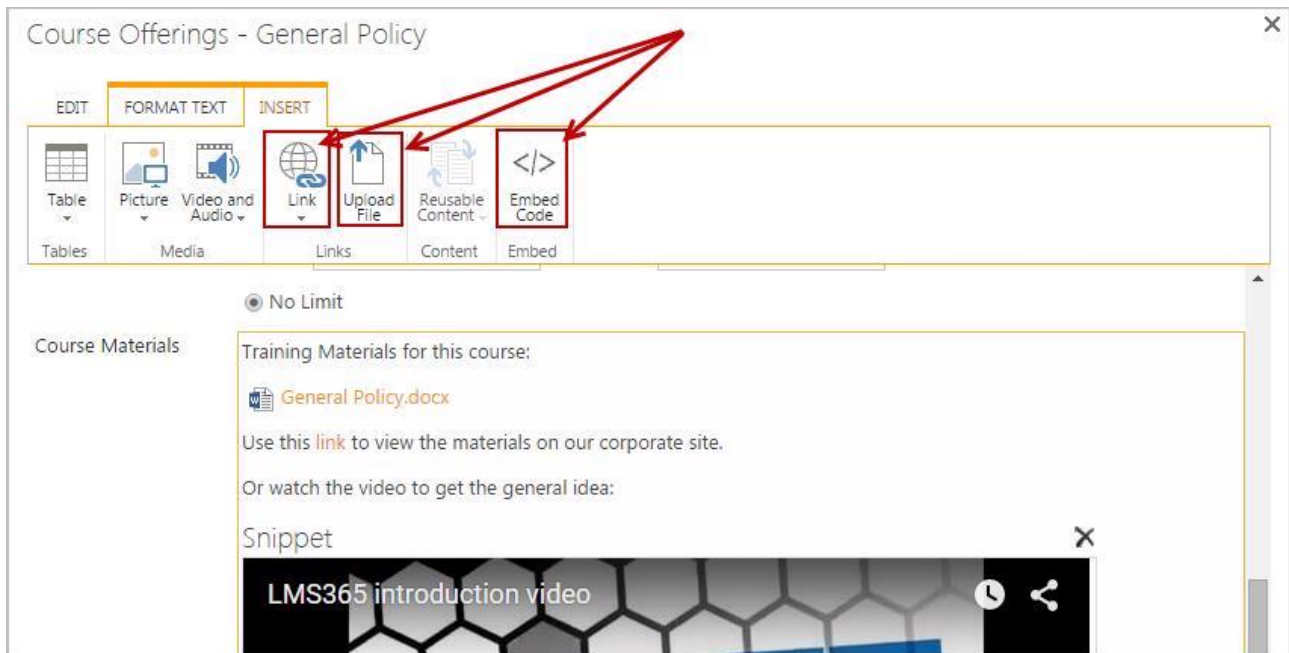
Required For Groups:   
Enter user groups separated with semicolons.

Recommended For Groups:   
Enter user groups separated with semicolons.

E-Signature Message:   
By clicking on the confirmation button you are acknowledging that you have read and understood all the course materials. You can find a link to other course materials and courses on the website:  
<https://www.lynda.com/IT-and-Hardware-training-tutorials/5776-0.html>

Save and create another    Finish    Cancel

- *Course Materials* – use this field to add Training Materials to the course that will be displayed to Learners after enrollment to Course. You can add text description, links to SharePoint or external resources, attach documents and embed video. Use tools in the Insert ribbon menu:



- *E-Signature* – select type of e-signature confirmation:
  - Simple Check Box – a checkbox with “I Agree” option is added next to the button:

**Terms And Conditions**

By clicking on the confirmation button I am acknowledging that I have completed this training.

I Agree

**Confirm** ✓

- Authorization – a password field is added next to the “Confirm” button:

**Terms And Conditions**

By clicking on the confirmation button I am acknowledging that I have completed this training and my password is my signature.

Your password

**Confirm** ✓

**NOTE:** Default text is displayed if it was not changed in the E-Signature Message field.

- *E-Signature Message* – enter text you want to display to the users in the Terms and Conditions textbox on the Material Offering Details and Material Registration Details pages instead of the default one:

**Terms and Conditions**

By clicking on the confirmation button you are acknowledging that you have read and understood all the course materials.  
 You can find a link to other course materials and courses on the website:  
<https://www.lynda.com/IT-and-Hardware-training-tutorials/5776-0.html>

Your password

Confirm

#### 4.1.10.1.1 Target Course Offerings

Course offering targeting is provided by a site collection feature which allows targeting offerings for groups and custom web parts which reflect those courses. To activate the feature perform the following steps:

1. On the REM welcome page, go to the Settings > Site Settings section;
2. Go to the Site Collection Administration > Site collection features section;
3. Activate the ELEARNINGFORCE REM Course Targeting feature:

**ELEARNINGFORCE - REM: Course Targeting**

Enables targeting functionality for Courses and Course Offerings.

Activate

After the feature is activated, it is possible to define which groups the course offering is targeted for (either AD or groups). To do that, go to create or edit a course offering, and use the new fields added by the feature:

**Required For Groups**

Enter user groups separated with semicolons.

**Recommended For Groups**

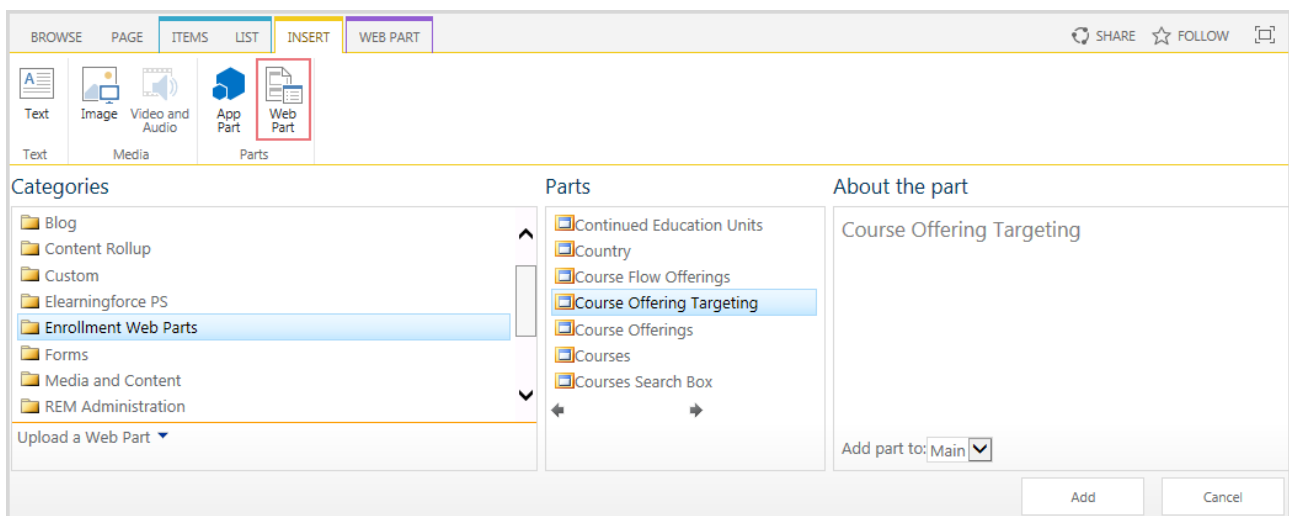
Enter user groups separated with semicolons.

To show targeted required and recommended course offerings, it is necessary to add a Course Offering Targeting web part to a page, and connect it to the Course Offerings List web part. You would usually want to do this for a course details page, which users open from the course catalog to read more information about the course and pick an offering e.g.

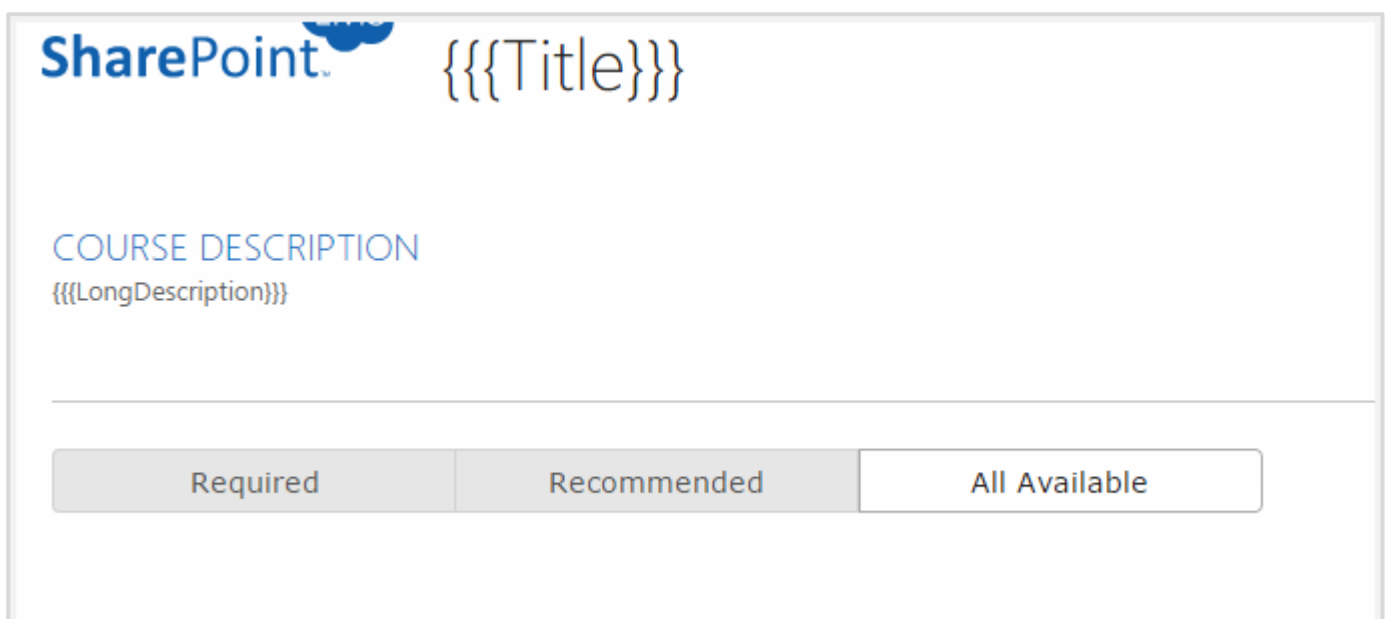
1. On the REM welcome page, go to the Settings > Site Contents section;
2. Find the Pages library and open it, search for pages like 'OnlineCourseDetails', etc. for different types of courses.

Course Offering Targeting web part provides three buttons: *Required*, *Recommended*, *All Available*. To add a Course Offering Targeting web part, edit a page and select Web Part option from the 'Insert' tab.

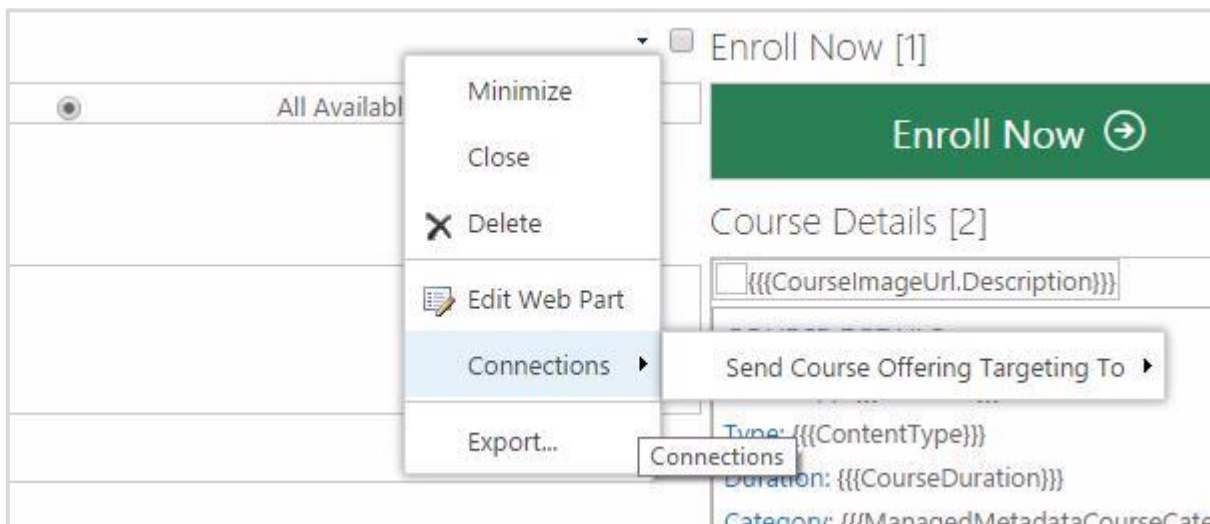
In the Categories section, choose Enrollment Web Parts, in the Web Parts section, choose Course Offering Targeting web part:



Click Add button. The specified web part will now appear on the page:



To connect the specified web part to the Course Offering List web part, click Edit Web Part>Connections>Send Course Offering Targeting To>Course Offerings:



When a logged in user clicks these buttons:

- *Recommended* – Course Offering List web part will display only the course offerings that are recommended for a logged in user;
- *Required* - Course Offering List web part will display only the course offerings that are required for a logged in user;
- *All Available* – Course Offering List web part will display all course offerings that are Recommended and Required for a specified AD or SP group member and all course offerings with empty columns [Required For Groups] and [Recommended For Groups]. This view is checked by default.

**NOTE:** If the feature is activated but the Course Offering Targeting web part is not connected to the Course Offering List web part, Course Offering List web part works as All Available option is selected.  
 If the Course Offering Targeting web part is added to the page, but afterwards the feature has been deactivated, the specified web part will be still on the page, but UI options will not be visible.  
 If the feature is activated, but the user is not registered, then there is no targeting applied to this user.

#### 4.1.10.2 Viewing Course Offerings

To view the course offerings details, do the following:

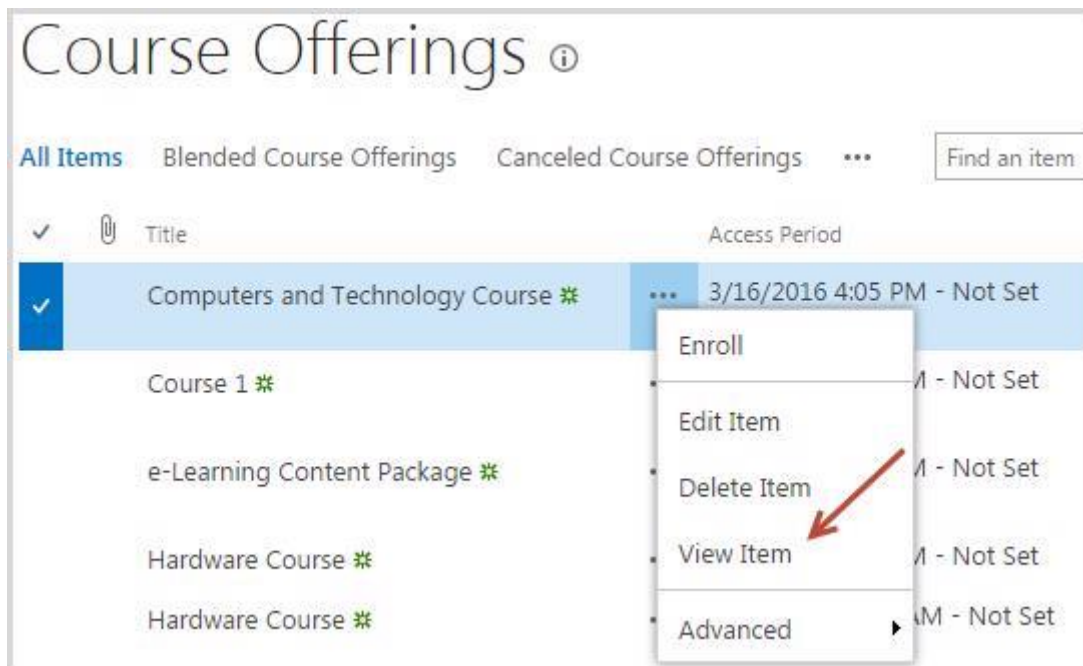
1. Go to the Course Offerings section;
2. Click the callout menu next to the needed Course Offering and select View Item:

# Course Offerings ⓘ

[All Items](#)
[Blended Course Offerings](#)
[Canceled Course Offerings](#)
...

✓	📎	Title	Access Period
✓		Computers and Technology Course ✳	3/16/2016 4:05 PM - Not Set
		Course 1 ✳	M - Not Set
		e-Learning Content Package ✳	M - Not Set
		Hardware Course ✳	M - Not Set
		Hardware Course ✳	M - Not Set

- Enroll
- Edit Item
- Delete Item
- View Item
- Advanced ▶











3. The following window will appear:



### Course Offerings - Computers and Technology Course ✕

VIEW

 Edit Item	 Version History  Shared With  Delete Item Manage	 Enroll  Send E-mail to Learners Actions	 Alert Me  Workflows
--	---	--	---

Course	Computers and Technology Course
Enrollment Template	Free Course with Auto Approval
Access Period	From 3/16/2016 to 3/25/2016
Registration Period	No Limit
Places Available In Target Course	4,294,967,296
Time Zone	(UTC) Casablanca
Minimum number of Learners	
Maximum number of Learners	
Teachers	
Other Teachers	
Auto Recertification	No
Days Prior to Certificate Expiration	
Course Offering Status	Active
Number of Enrolled Users	0
Number in Waiting List	0
Required For Groups	
Recommended For Groups	
Groups To Enroll	

Content Type: e-Learning Offering

Created at 3/16/2016 4:05 PM by  ageucheva\_a

Last modified at 3/17/2016 11:18 AM by  ageucheva\_a

Close

- The fields *Course* and *Enrollment Template* become clickable. Click their titles to open the window with the detailed information;
- The new fields will be added: *Number of Enrolled Users* (users with registration status *Enrolled and Waiting for Start Date*. This field is updated by Courses Synchronization Timer Job or manually by using Synchronize Courses ribbon action), *Number in*

*Waiting List* (users with the registration status *In Waiting List*) and *Course Offering Status*.

The following statuses are possible for Course Offerings:

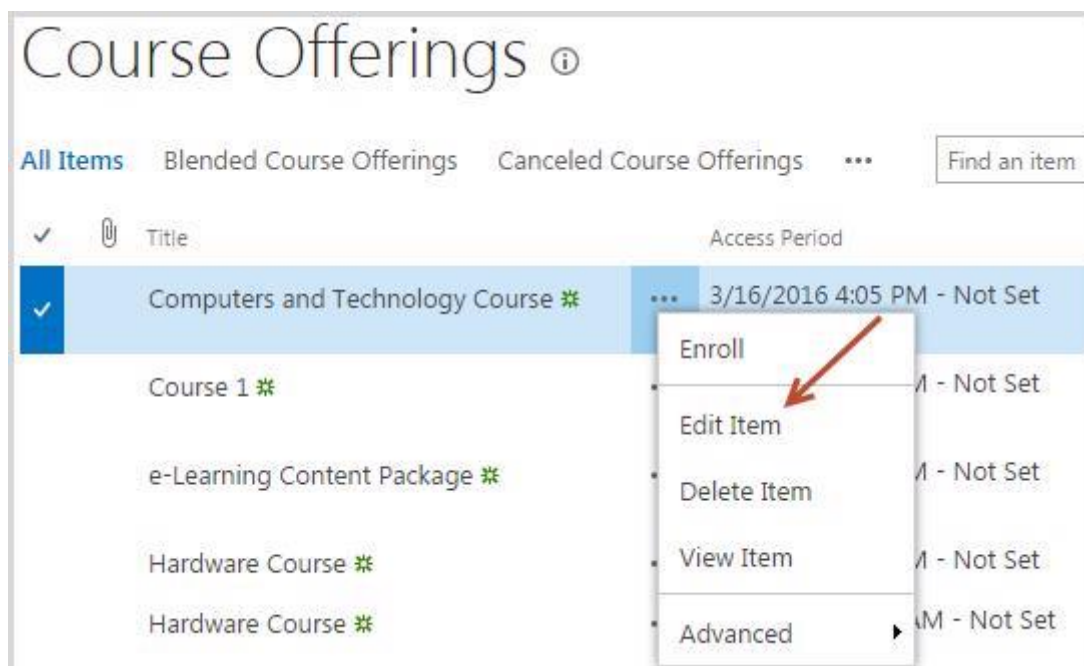
- In Planning – shows that course offering is planned but is not ready for enrollment yet. Course Offerings with this status are not displayed for Learners;
- Active – shows that course offering is available for enrollment. This status is set by default during course creation or can be set manually by Administrator;
- Cancelled – shows that course offering has been cancelled;
- Closed – shows that course offering has been closed by Teacher via Dashboard or by LMS Administrator on Course Offerings list (whilst editing course offering) or by timer job according to settings of the enrollment template;
- Ended – shows that Access Period of the Course Offering has ended. This status is set automatically by timer job.

4. Click Close to close the window.

#### 4.1.10.3 Editing Course Offerings

To edit the course offerings details, do the following:

1. Go to the Course Offerings section;
2. Click the callout menu next to the needed Course Offering and select Edit Item:

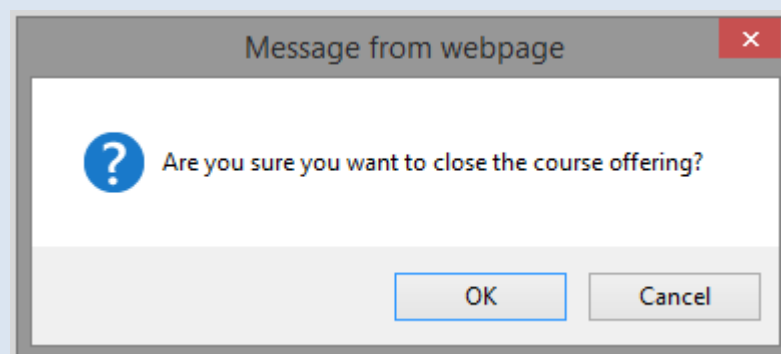


3. In the open window you can edit the following fields (for more information on completing the form, see the [Creating Course Offerings](#) section):

- 11. Access Period;
- 12. Registration Period;
- 13. Location;
- 14. Room;
- 15. Time Zone;
- 16. Tuition;
- 17. Currency;
- 18. Min. Learner Number;
- 19. Max. Learner Number;
- 20. Teachers;
- 21. Course Offering Status;

Course Offering status	Can be changed to
Active	In Planning Closed Cancelled
Ended	Active Closed In Planning
Closed	Active In Planning Cancelled
In Planning	Active Cancelled Closed

**NOTE:** When you change Course Offering status to 'Closed', a confirmation message will appear:



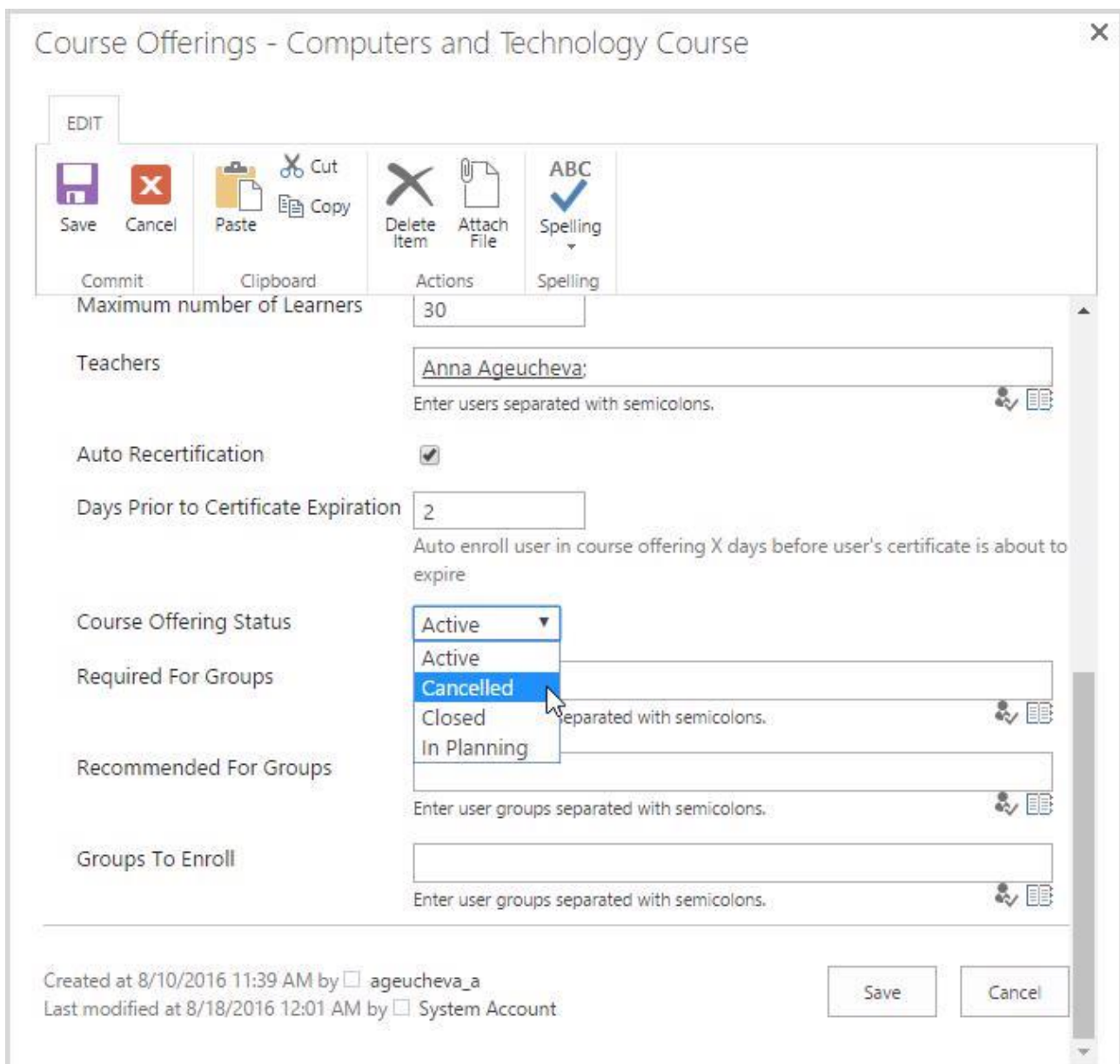
Click OK button to close the offering or Cancel button to discard the action.

- 22. Groups To Enroll;
  - 23. Required for Groups;
  - 24. Recommended for Groups.
4. Click Save to save the changes.

#### 4.1.10.4 Cancelling Course Offerings

To cancel a Course Offering, do the following:

1. Go to the Course Offerings section;
2. Select the Course Offering you want to cancel and click Edit item in the callout menu. In the Advanced settings section select Cancelled from the Course Offering Status drop-down and click Save button:



Course Offerings - Computers and Technology Course

EDIT

Save Cancel Paste Cut Copy Delete Item Attach File Spelling

Commit Clipboard Actions Spelling

Maximum number of Learners

Teachers   
Enter users separated with semicolons.

Auto Recertification

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

Course Offering Status   
Active  
Cancelled  
Closed  
In Planning

Required For Groups   
Enter users separated with semicolons.

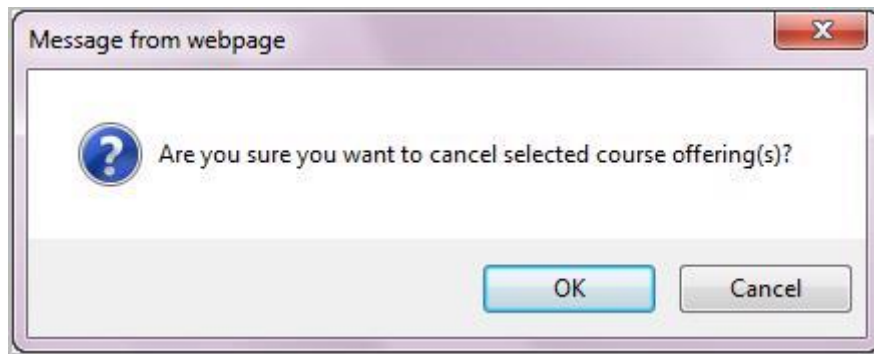
Recommended For Groups   
Enter user groups separated with semicolons.

Groups To Enroll   
Enter user groups separated with semicolons.

Created at 8/10/2016 11:39 AM by  ageucheva\_a  
Last modified at 8/18/2016 12:01 AM by  System Account

Save Cancel

3. Confirm cancelling the Course Offering:



After a Course Offering is cancelled, all Learners Enrolled to the Course offering are sent a notifying email "Course Offering Canceled" that is selected in the [Enrollment Template](#).

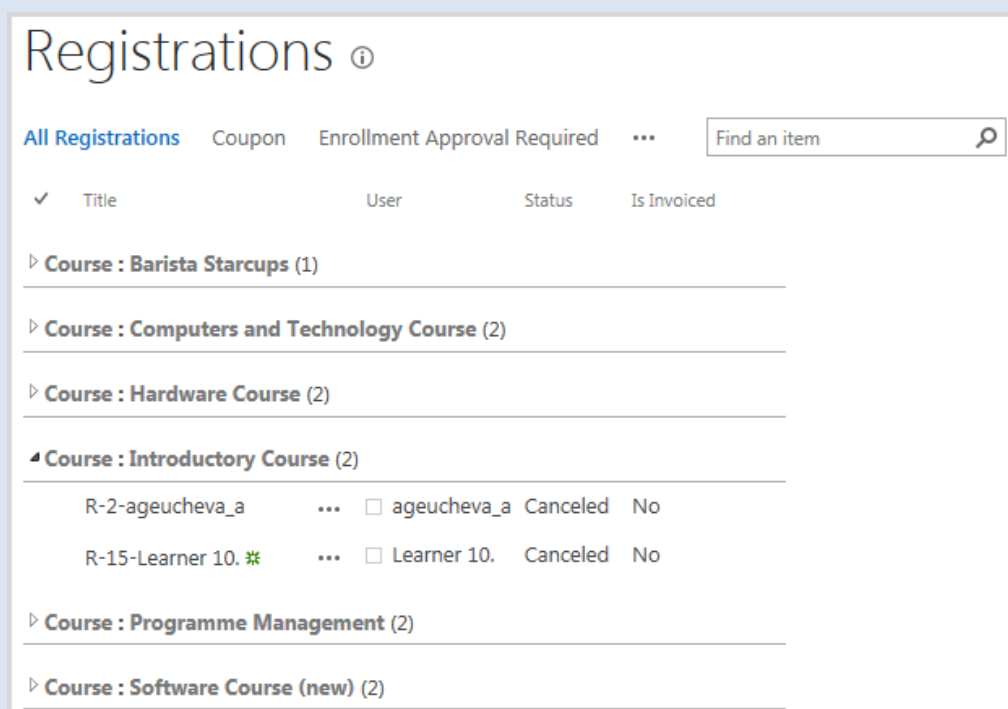
**NOTE:** There is no automatic flow to enroll learners from the cancelled course offering to another one.

If you need to enroll all learners to another course offering, you have several options:

- REM administrator enrolls all learners to the new course offering;
- learners enroll in a different course offering on their own;
- create an email for all the learners to tell where they should enroll.

**NOTE:** Information about registrations to the cancelled course offering is stored in the Registrations list.

All registrations to the cancelled Course Offering except registrations with the 'Course Completed' and 'Certificate Expired' statuses get *Cancelled* status:

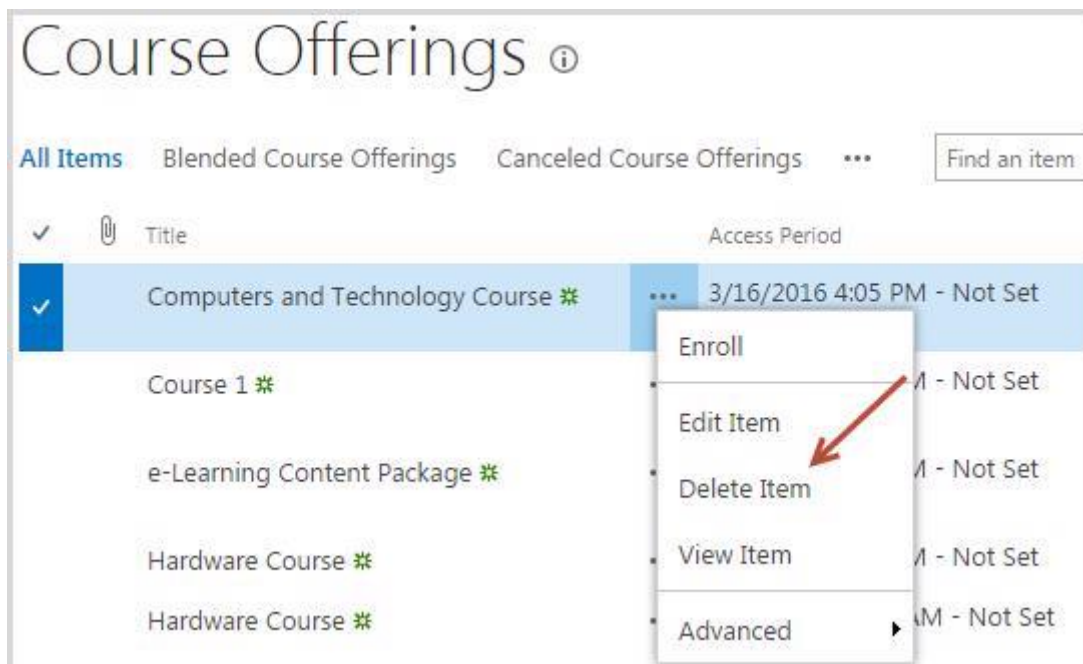


If registration had 'Course Completed' status before course offering was cancelled, its certificate and CCM Competencies are not deleted.

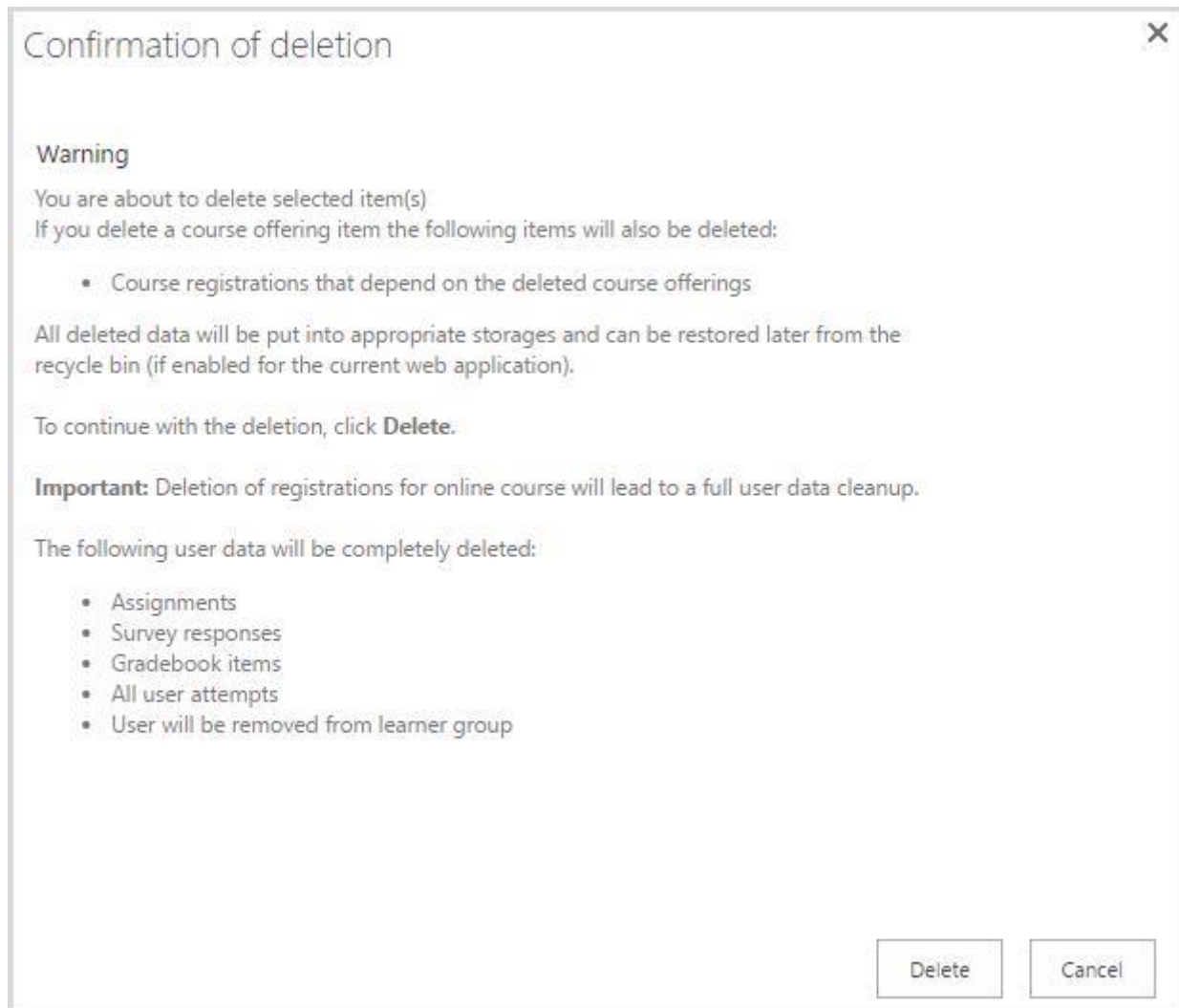
#### 4.1.10.5 Deleting Course Offerings

To delete a Course Offering, do the following:

1. Go to the Courses section;
2. Click the callout menu next to the Course Offering you want to delete and select Delete Item (or click Delete Item button on the ribbon):



3. After that, you will see a confirmation message with the information about what will be deleted. Pay attention that if you delete course offering for online courses, all user's related data will be deleted as well:



4. Click Delete button to confirm the deletion or Cancel button to discard the action.


All registrations to the deleted Course Offering get Cancelled status with Cancellation reason *Canceled by Course Offering*.


Go to All Site Content > Deleted Courses to open the storage for deleted course offerings.

<b>NOTE</b>	When using bulk deletion, Reporting Center records are updated only after synchronization (not by receivers).
<b>NOTE</b>	After a course offering is deleted from the Organization site collection, it gains the Removed status. By default the course offerings with such a status are not displayed in the list of courses. To show them in the list, do the following: <ol style="list-style-type: none"> <li>1. Go to List &gt; Modify View;</li> <li>2. In the Filter section, select the Show all items in this view option, and then click OK:</li> </ol>

**Filter**

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

 Show all items in this view

 Show items only when the following is true:

Show the items when column

Course Status

is not equal to

Removed

And  Or

When column

None

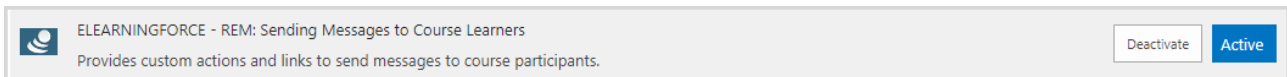
is equal to

[Show More Columns...](#)



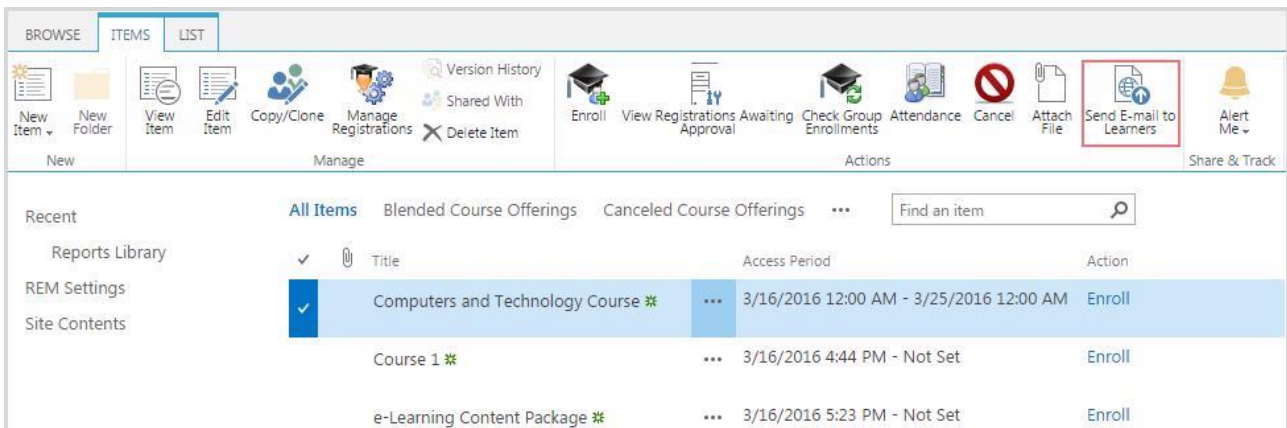
#### 4.1.10.6 Send E-mail to Learners

The system allows sending E-mail to all Learners enrolled to a course offering in one go. It is enabled by the *ELEARNINGFORCE – REM: Sending Messages to Course Learners* site feature. To activate the feature, go to Settings > Site Settings > Site Actions > Manage Site Features:



After the feature is activated, a new button is added to the Course Offerings list ribbon menu. To use this feature, do the following actions:

1. Go to the Course Offerings list;
2. Select the needed course offering from the list or open it for view;
3. Click the "Send E-mail to Learners" button in the ribbon menu:

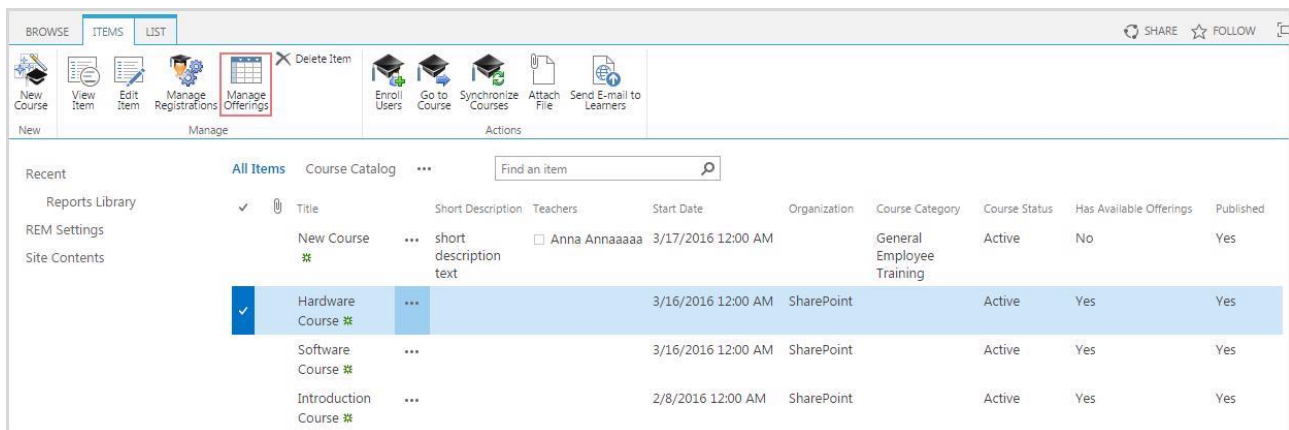


4. A new message will be created in the Microsoft Outlook addressed to all Learners of the selected course offering with the Enrolled status as well as to the Course Teachers. All addressees are added to the BCC: address field.
5. Type the e-mail subject and body and send the e-mail to all enrolled Learners and Course Teachers.

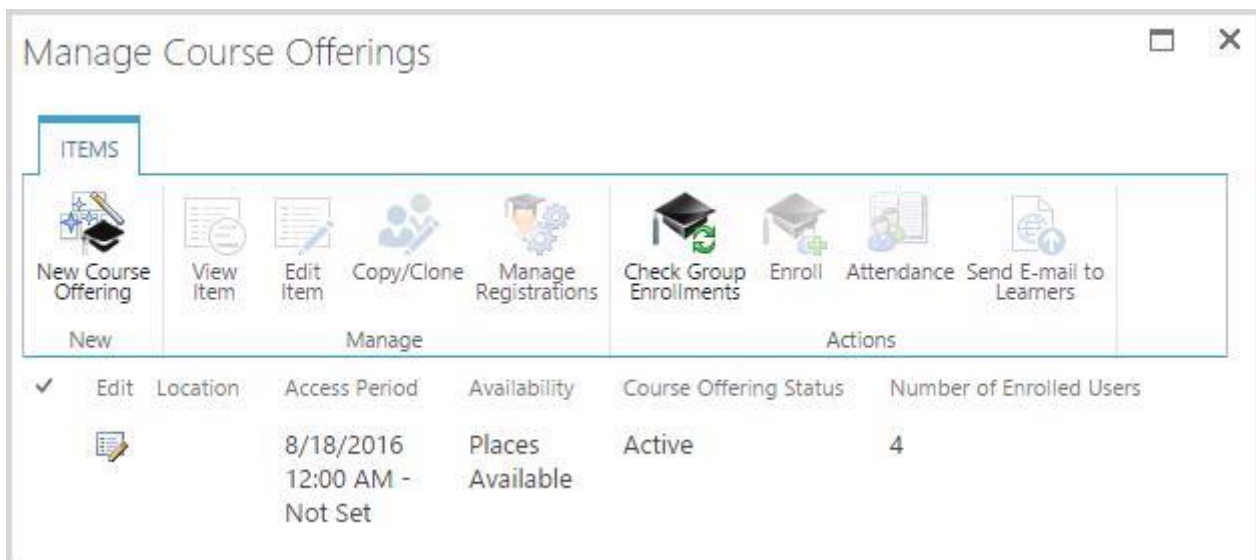
#### 4.1.10.7 Managing Course Offerings from Courses List

User can get access to Course Offerings management from the Courses section:

1. Select a Course in the Courses list and click 'Manage Offerings' in the ribbon menu:



2. A list of Course Offerings to that Course will open in a modal window. User can manage these Offerings using ribbon menu buttons:

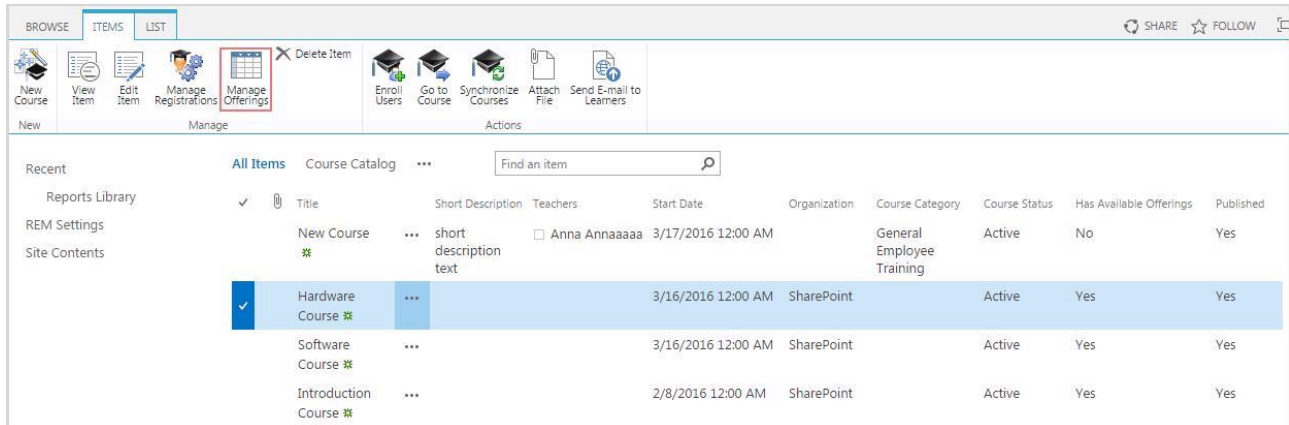


#### 4.1.10.8 Copy/Clone Course Offerings

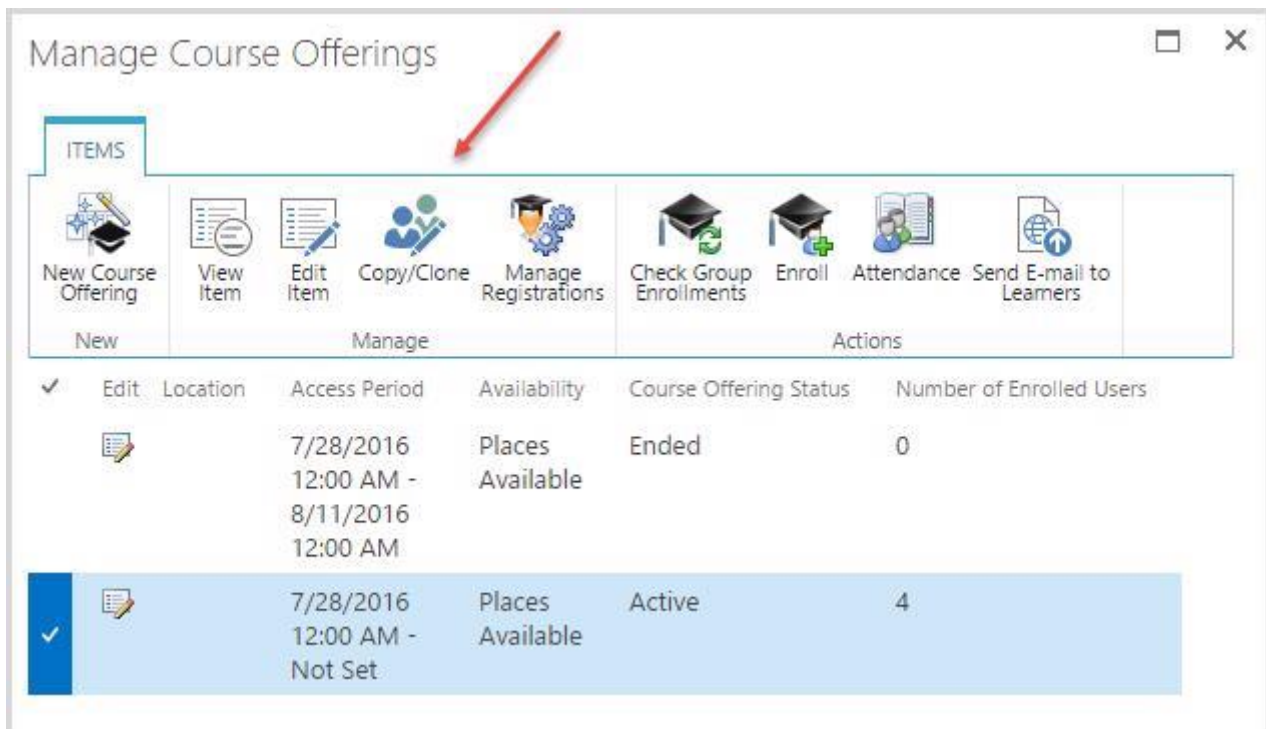
If you need to create many course offerings for one course, you can use Copy/Clone functionality. You can get access to it from the Courses list and from the Course Offerings list.

*From the Courses List:*

1. Select a Course in the Courses list and click 'Manage Offerings' in the ribbon menu:

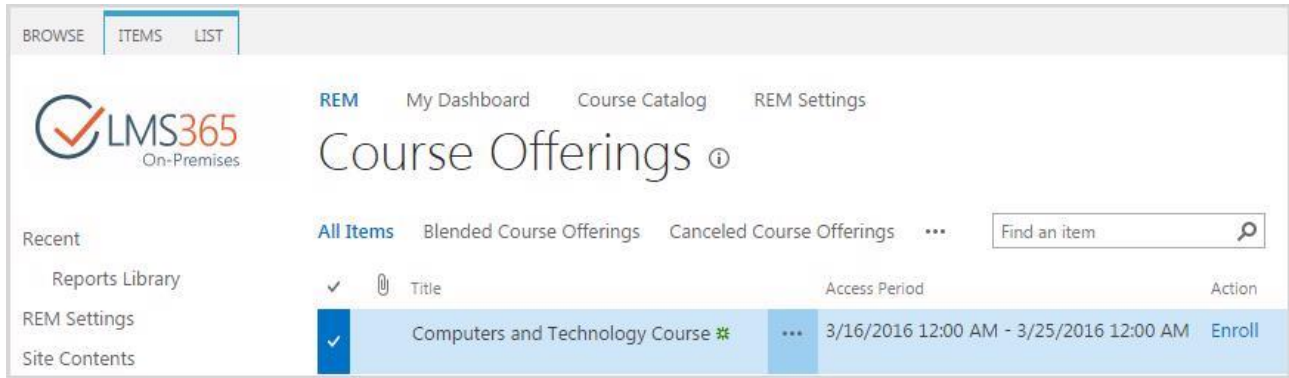


2. Select one Course Offering and click Copy/Clone in the ribbon:



From the Course Offerings List:

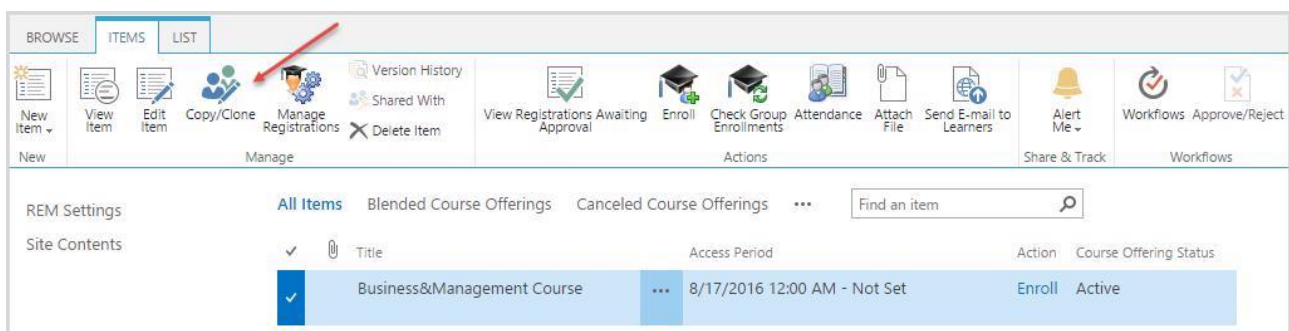
1. Go to Course Offerings list and select necessary Course Offering:



Course Offerings

✓	📎	Title	...	Access Period	Action
✓		Computers and Technology Course ✱	...	3/16/2016 12:00 AM - 3/25/2016 12:00 AM	Enroll

2. Click Copy/Clone button in the ribbon menu:



Course Offerings


✓	📎	Title	...	Access Period	Action	Course Offering Status
✓		Business&Management Course	...	8/17/2016 12:00 AM - Not Set	Enroll	Active


After that, a new Course Offering form will appear with all settings copied from the selected offering:


### Course Offerings - New Item


✕


**EDIT**


  
Save  
Commit

  
Cancel

  
Paste

  
Cut  
Copy

  
Attach File

  
ABC  
Spelling

**Course \***  📄 📄

🔗 SharePoint LMS Learner Group

**Enrollment Template \*** Free Course with Auto Approval ▼ View Template

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

**Access Period \*** From  📅 To  📅

**Registration Period \***

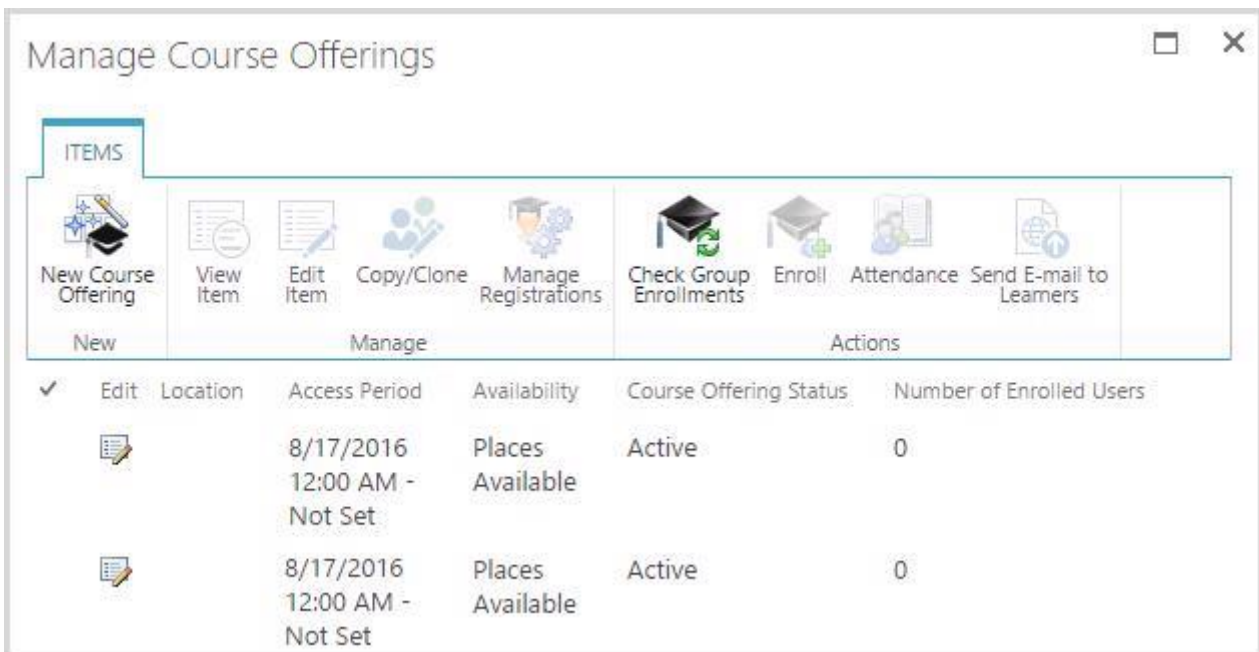
Date Range

From  📅 To  📅

No Limit

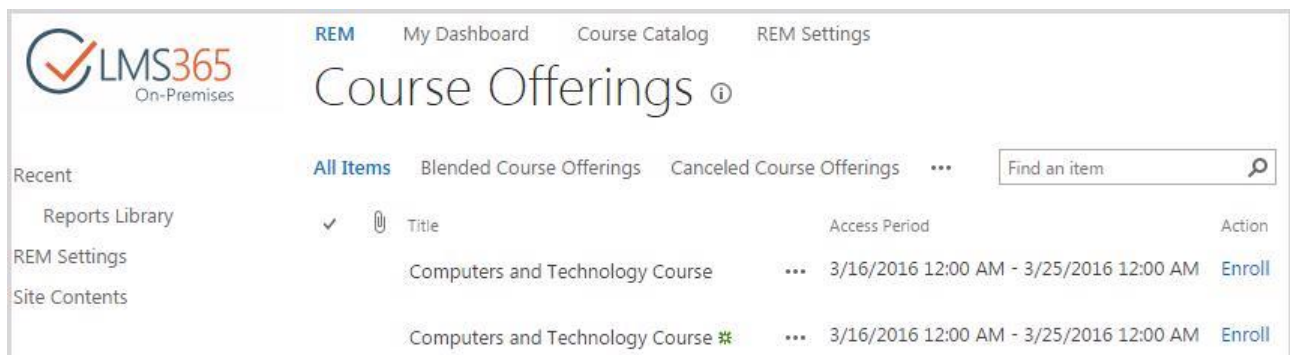
🔗 [Advanced Settings](#)

Make all necessary changes on the Course Offering creation form and click 'Save' to create the new Course Offering:



✓	Edit	Location	Access Period	Availability	Course Offering Status	Number of Enrolled Users
			8/17/2016 12:00 AM - Not Set	Places Available	Active	0
			8/17/2016 12:00 AM - Not Set	Places Available	Active	0

It will be added to the list of Course Offerings:

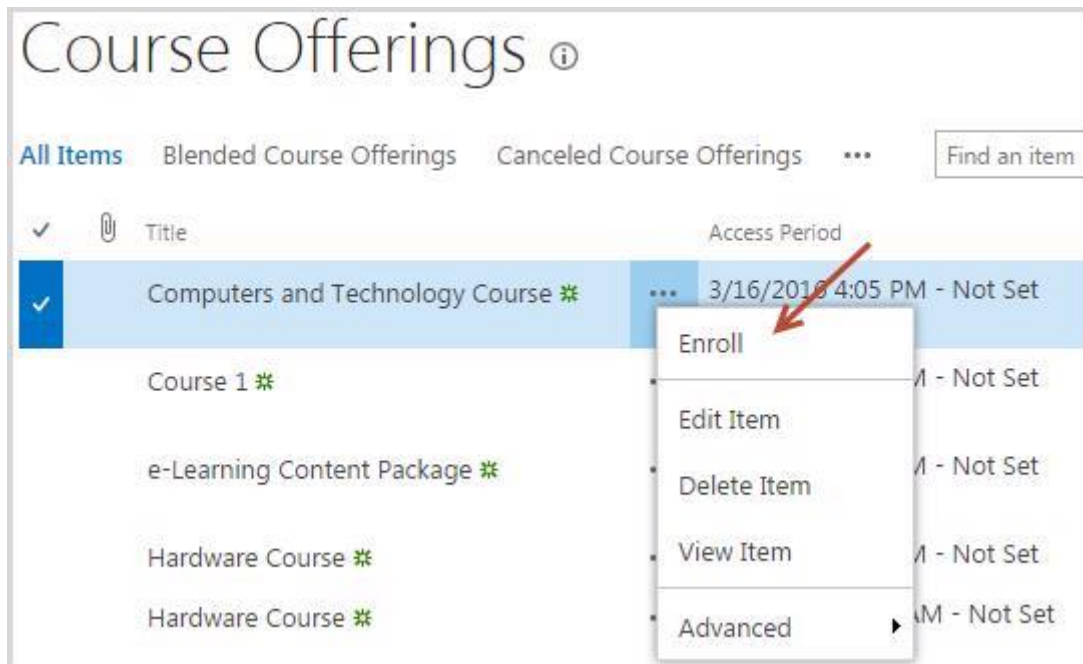


✓		Title	Access Period	Action
		Computers and Technology Course	3/16/2016 12:00 AM - 3/25/2016 12:00 AM	Enroll
		Computers and Technology Course	3/16/2016 12:00 AM - 3/25/2016 12:00 AM	Enroll

#### 4.1.10.9 Enrolling Users from Course Offerings list

To enroll a new user from the Course Offerings section, do the following:

1. Go to the Course Offerings section;
2. Click the callout menu next to the needed course, and then select Enroll from the list:



3. You will be redirected to the Enrollment form. Complete the open form:
  - *Add multiple users* – this checkbox is selected/cleared during the Course Template creation;
  - *Create New Users* – if you want to add the users who are not registered in REM yet, complete the user information in the fields below, and then click Add User:

**User Information**

User Information  Add Multiple Users

▶ Create New Users

Login Name: \*

Email: \*

First Name: \*

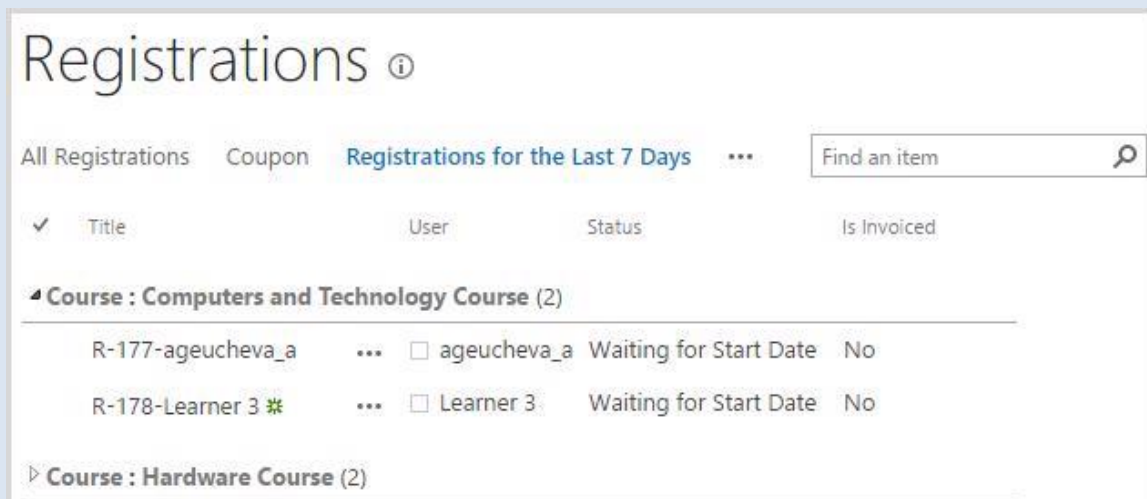
Last Name: \*

Login Name    First Name    Last Name    Email

**NOTE:** This field is only displayed if you unchecked the Don't use users registration part box during the site collection creation (for details see chapter *Create REM Application Host* in "LMS365 On-Premises 4.8 Installation and Configuration Guide"). If the box was checked, you can only enroll the existing users and the mentioned above field will be hidden.

- *Select existing users to enroll* – type the name of the user you want to add, and then click the Check Names (🔍) button OR use the Browse (📄) button to find users;
- *Invoice Address* – complete the information about the person/company who will pay for the course;
- Select the checkbox to be notified if places on the course become available (if the course is already full); this option is active only if you activated the waiting list during the template creation;
- *Accept Terms and Conditions* – this checkbox is to be checked in order to allow you enrolling the users on the course:

**NOTE** : If you try to enroll user into a Course Offering with Automatic Approval type and Start Date in future, a Registration with status 'Waiting For Start Date' is created:



User will be enrolled after Start Date comes (and 'ELEARNINGFORCE – REM: Waiting for Start Date Enrollments Job' runs).

If you try to enroll user into a Course Offering with Line Manager Approval type and Start Date in future, a Registration with status 'Waiting for Approval' is created first. When enrollment request is approved and Start Date has not yet come, a Registration changes its status to 'Waiting For Start Date' and user will be enrolled after Start Date comes (and 'ELEARNINGFORCE – REM: Waiting for Start Date Enrollments Job' runs).



▶ Select existing users to enroll

John Smith

**Invoice Address**

Company

Street

City

State

Country

ZIP code

Telephone

Accept  [Terms and Conditions](#)

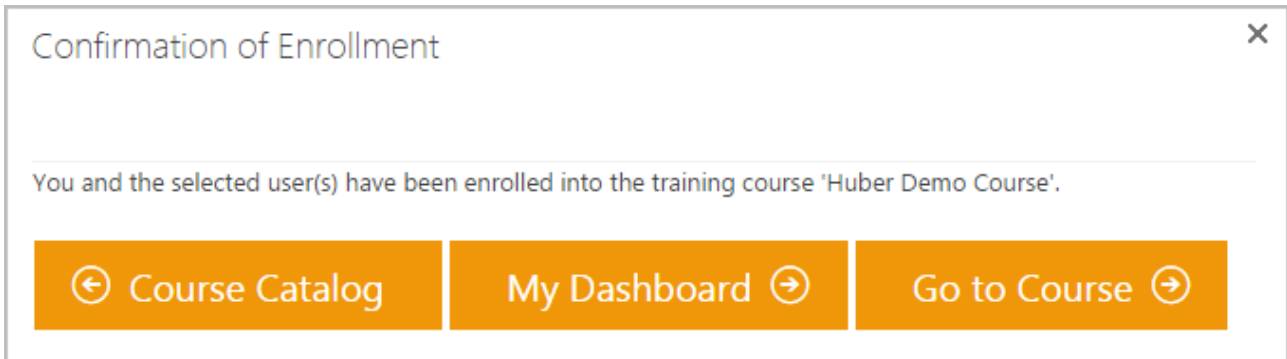
OK Cancel

4. Click OK to enroll the specified users;
5. An Enrollment Confirmation message will be displayed to confirm successful enrollment:

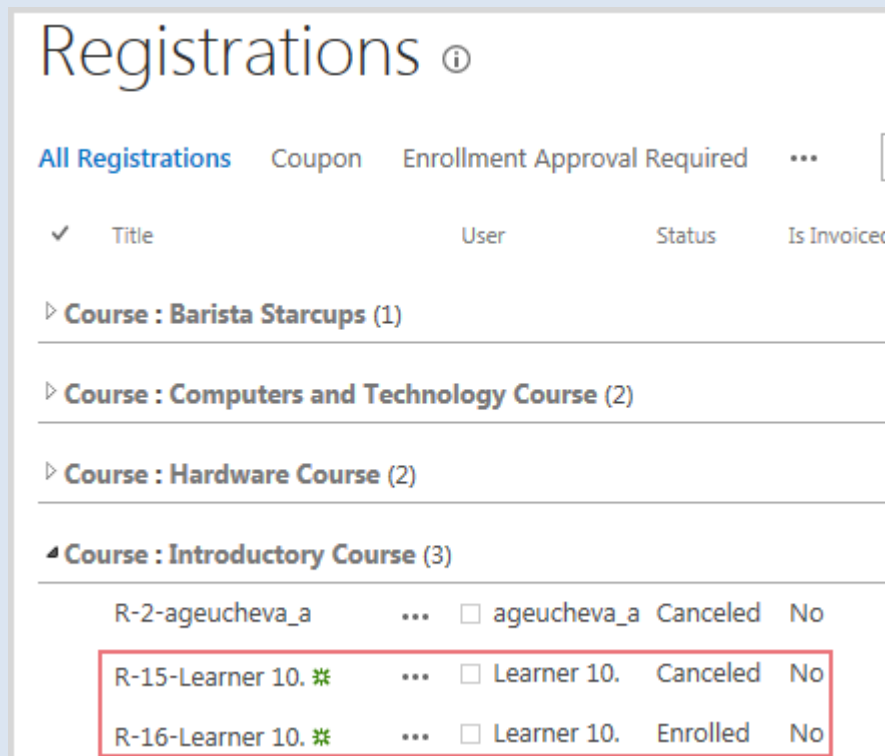
Confirmation of Enrollment ✕

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

If you have enrolled yourself along with some Learners, a message with 'Course Catalog', 'My Dashboard' and 'Go to Course' buttons will be displayed:



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



Registrations ⓘ

All Registrations Coupon Enrollment Approval Required ...

✓	Title	User	Status	Is Invoiced
▶	Course : Barista Starcups (1)			
▶	Course : Computers and Technology Course (2)			
▶	Course : Hardware Course (2)			
▲	Course : Introductory Course (3)			
	R-2-ageucheva_a	...	<input type="checkbox"/> ageucheva_a Canceled	No
	R-15-Learner 10. ✱	...	<input type="checkbox"/> Learner 10. Canceled	No
	R-16-Learner 10. ✱	...	<input type="checkbox"/> Learner 10. Enrolled	No


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

**NOTE:** If you enroll multiple users with the 'Course Completed' registrations' status in the e-Learning or Blended course types, you will see a warning message about the recertification along with their logins. If you enroll AD/SP group in such case, a warning message will not be displayed.

### 4.1.11 Curriculums Management


Curriculum functionality allows creating and managing maps of training courses for selected users to give them a total overview of which learning map must be completed to fulfill their job.

To activate the feature, go to Settings > Site Settings > Manage site features and activate the ELEARNINGFORCE - REM: Curriculum feature:

	<b>ELEARNINGFORCE - REM: Curriculum</b> Build and maintain a map of training courses for selected users so they have a total overview of which learning map must be completed to fulfill their job.	<input type="button" value="Deactivate"/>	<input checked="" type="button" value="Active"/>
---	--	---	--

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
 Cancel

Paste
 Cut
 Copy

ABC
 Spelling

Commit
Clipboard
Spelling

**Name \***

**Short Description**

**Long Description**

**Courses \***

**Published**

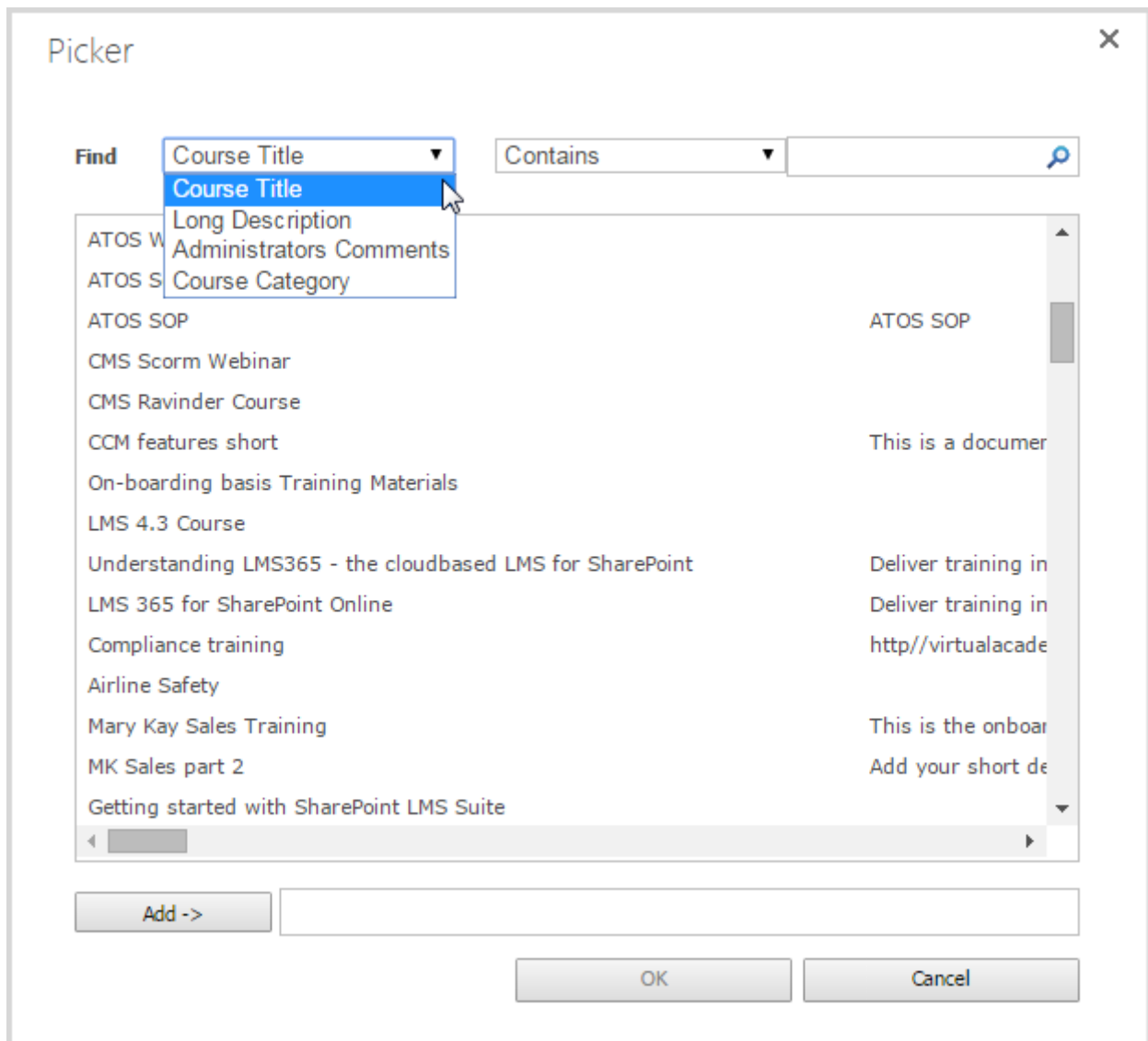
[Targeting Settings](#)

[Email Templates Configuration](#)

[Advanced Settings](#)

Save
Cancel

- *Name* – type name for the curriculum;
- *Short Description* – text field for clear description of the curriculum;
- *Long Description* – text field for the detailed curriculum description;
- *Courses* – use course picker to select courses that will be included in the Curriculum. Courses can be searched by Course Title, Long Description, Administrators Comments and Course Category:

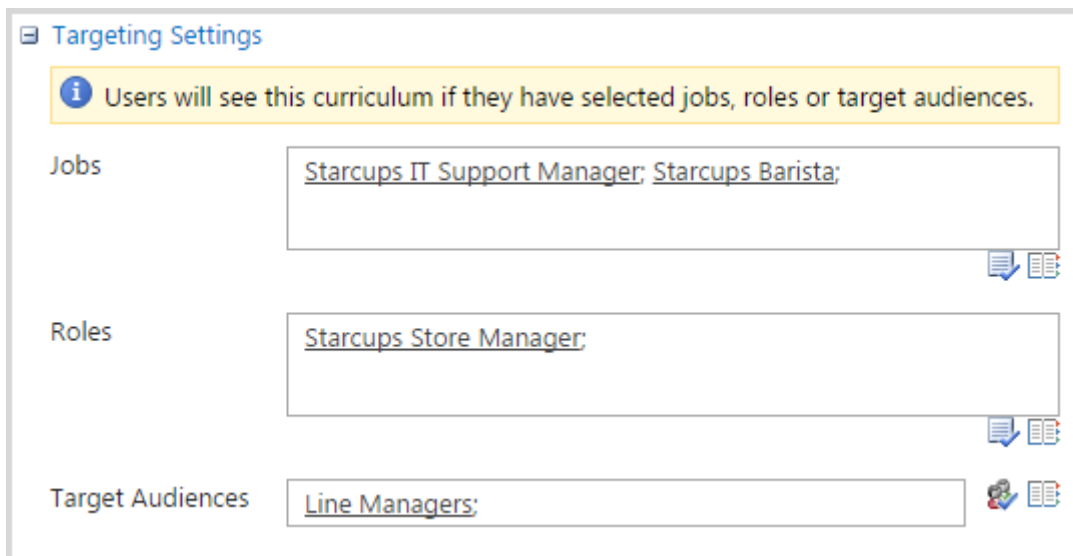


- *Published* – check the box in order to show this curriculum in the Dashboard. If the box is not checked, you can manage curriculum without publishing it immediately;

**NOTE:** You can create a custom field (in the List Settings) to mark Curriculum as required or recommended with the future possibility to see this information in the web report (by adding needed column in the Grid Settings):

Targeting	<input type="text"/>
	Required or recommended

Use targeting settings to select jobs/roles/target audience to which the curriculum will be assigned. At least one target must be selected:



The screenshot shows a 'Targeting Settings' panel with a yellow information banner at the top stating: 'Users will see this curriculum if they have selected jobs, roles or target audiences.' Below this are three sections: 'Jobs' with the text 'Starcups IT Support Manager; Starcups Barista;', 'Roles' with 'Starcups Store Manager;', and 'Target Audiences' with 'Line Managers;'. Each section has a text input field and a small icon of a document with a blue arrow pointing down to its right.

- *Jobs* – use jobs picker to select jobs to which the curriculum will be assigned:

### Select Jobs ✕

Find

Title	Description	Job Roles
Starcups Barista	Experienced employee	Starcups Trained Barista
Starcups IT Support Manager		Regular Starcups Staff - New Hire
Accountant		Accounting specialist

**Found 3 matches.**

- Roles – use roles picker to select roles to which the curriculum will be assigned:



### Select Roles ✕

Find

Title	Description	Role Competencies
Starcups Trained Barista		Advanced Barista Skill-Master, Coffee-making-Ma
Accounting specialist		Business Conduct-Average, Company and Produc
Regular Starcups Staff - New Hire		Coffee-making-Experienced, Communication-Abor
Starcups Store Manager		Coffee-making-Master, Company and Product Kno

F

---

- *Target audience* – use target audience picker to select target audience to which the curriculum will be assigned. You can choose to add SharePoint Groups:

### Select Audiences ✕

Find SharePoint Groups ▾ learners 🔍

Name	Alias	Description	Total Members
Learners		Group contains learners who are enrolled in a course.	6

Add ->
Learners;

OK
Cancel

- NOTE:** AD Groups are not supported in the Curriculum Targeting Settings. If you want to target AD group to the curriculum, you will need to add it to the SharePoint group first, and then target this SharePoint group to the curriculum.
- NOTE:** Curriculum Enrollment Confirmation email is instantly sent to all users specified in Targeting Settings after the creation of the curriculum if it is published. After editing the curriculum, this email notification is sent to those users who have not received it yet if Targeting Settings are changed (Curriculum Targeting Notification Job checks which users have received the email notification yet in order to send it only to those users who were added to Targeting Settings after the creation of the curriculum). If curriculum has not been published after the creation and becomes published after editing, all users specified in Targeting Settings will receive Curriculum Enrollment Confirmation email.
- 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.

Use Email Templates Configuration settings to configure sending curriculum email notifications:



Email Type	Email Template	Enabled
Curriculum Completion Due Date Reminder Notification	Default	<input checked="" type="checkbox"/>
Curriculum Enrollment Confirmation	Default	<input checked="" type="checkbox"/>
Curriculum Completed Confirmation	Default	<input checked="" type="checkbox"/>
Curriculum Certificate Has Expired	Default	<input checked="" type="checkbox"/>
Curriculum Certificate Is Expiring Reminder	Default	<input checked="" type="checkbox"/>

- Email Type column – specifies email type. They are as follows: Curriculum Completion Due Date Reminder Notification, Curriculum Enrollment Confirmation, Curriculum Completed Confirmation, Curriculum Certificate Has Expired, Curriculum Certificate Is Expiring Reminder;
- Email Template column – allows choosing email template for each email type (default or previously created);
- Enabled column – allows enabling/disabling sending email notifications (by default all are enabled).

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.

**Send overdue email reminder to**

Learner   
 Manager   
 Manager's manager


Reminder will be sent to the specified number of days after 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.

- Curriculum Prerequisites – enables setting a specific order of passing curriculums. It will allow Learners to pass current curriculum only after passing curriculum(s) specified in this field. It is possible to select multiple curriculum prerequisites:

### Select Curriculums X

Find  Contains

**Title**

New Hire basic Training

Project Manager

Game Designer Training plan

LMS365 Project Manager Foundation

Instructional designer - required training

Business Project Management

GHQ - Offroad Driving

Recommended training - EFI Sales team

New Employee Curriculum

**Found 9 matches.**

If curriculum is locked by prerequisite(s), it is shown in My Training Overview with the locked icon:

Current (2)	Curriculums (2)	Pending Approval (0)	Waitlisted (0)	Completed (3)	All (10)																																								
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Name</th> <th>Category</th> <th>Course Type</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td colspan="4"> <b>Curriculum : LMS365 Project Manager Foundation (Locked by: Project Manager)</b> ⓘ                 </td> </tr> <tr> <td>Understanding LMS365 - the cloudbased LMS for SharePoint</td> <td>IT and Technical Training</td> <td>e-Learning</td> <td>Locked</td> </tr> <tr> <td>LMS 365 for SharePoint Online</td> <td>IT and Technical Training</td> <td>e-Learning</td> <td>Locked</td> </tr> <tr> <td>LMS365   Learning Management for Office 365</td> <td>IT and Technical Training</td> <td>e-Learning</td> <td>Locked</td> </tr> <tr> <td>LMS365 Video Training</td> <td>Sales and Marketing</td> <td>Material</td> <td>Locked</td> </tr> <tr> <td>LMS 365 Launch</td> <td>Sales and Marketing</td> <td>Material</td> <td>Locked</td> </tr> <tr> <td colspan="4"> <b>Curriculum : New Employee Curriculum (Completed: 0 out of 2)</b> ⓘ                 </td> </tr> <tr> <td>LMS365   Learning Management for Office 365</td> <td>IT and Technical Training</td> <td>e-Learning</td> <td>Not Enrolled</td> </tr> <tr> <td>IBM Business Conduct Guidelines 2</td> <td>Compliance Training</td> <td>Material</td> <td>Not Enrolled</td> </tr> </tbody> </table>						Name	Category	Course Type	Status	<b>Curriculum : LMS365 Project Manager Foundation (Locked by: Project Manager)</b> ⓘ				Understanding LMS365 - the cloudbased LMS for SharePoint	IT and Technical Training	e-Learning	Locked	LMS 365 for SharePoint Online	IT and Technical Training	e-Learning	Locked	LMS365   Learning Management for Office 365	IT and Technical Training	e-Learning	Locked	LMS365 Video Training	Sales and Marketing	Material	Locked	LMS 365 Launch	Sales and Marketing	Material	Locked	<b>Curriculum : New Employee Curriculum (Completed: 0 out of 2)</b> ⓘ				LMS365   Learning Management for Office 365	IT and Technical Training	e-Learning	Not Enrolled	IBM Business Conduct Guidelines 2	Compliance Training	Material	Not Enrolled
Name	Category	Course Type	Status																																										
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LMS365 Video Training	Sales and Marketing	Material	Locked																																										
LMS 365 Launch	Sales and Marketing	Material	Locked																																										
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LMS365   Learning Management for Office 365	IT and Technical Training	e-Learning	Not Enrolled																																										
IBM Business Conduct Guidelines 2	Compliance Training	Material	Not Enrolled																																										

**NOTE:** If curriculum is locked by prerequisites, its courses will also be locked.

**NOTE:** Learner cannot enroll in a course that is locked by curriculum prerequisites from Course Details page, a mouse over message with explanations will appear:



**NOTE:** Learner cannot enroll in a course that is locked by curriculum prerequisites from Course Offerings list, in Action column this course will be locked:

Course : View course details (1)							
55	Mary Kay Sales Training	17/02/2015 00:00 - 04/06/2016 00:00	Locked	Active	e-Learning Offering	14/01/2016 10:24	<input type="checkbox"/> Anna Ageucheva

- Due Date – set date when all courses included in the curriculum must be completed:
  - o Never – select this option to set no due date;
  - o Days after enrollment – select this option to set the number of days, after which the due date comes. Enrollment Date is a minimum enrollment date of all registrations of the curriculum;

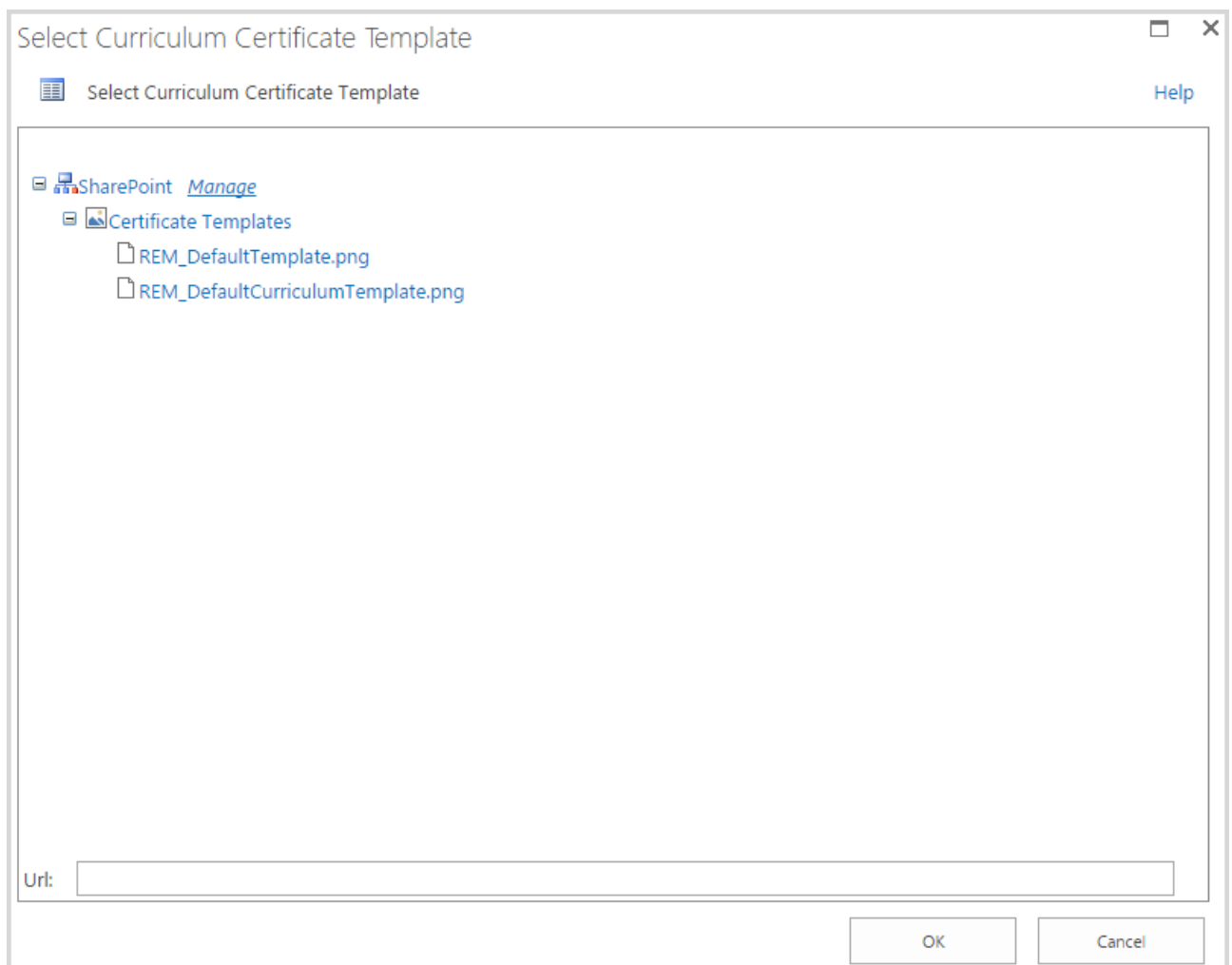
**NOTE:** If there is an existing registration for the course included in a curriculum and its enrollment date (when registration status became Enrolled) is less than date of curriculum creation, curriculum creation date is used for the due date calculating.

- o Date – select this option and set the due date;

- Email Notification Settings – specify the number of days before due date (multiple values are allowed separated by comma) when user is notified about it;

**NOTE:** Due Date settings do not influence the status of Curriculum.

- Send overdue email reminder to – specify roles to which an email reminder will be sent as well as the number of days after the due date when they will be notified. Manager role includes Manager from the CCM Profile (Line Manager), HR Responsible, and Manager added via Relationship list. Manager’s manager role includes lower hierarchy of managers (e.g. Line Manager of the manager from the Relationship list);
- Certificate – default Curriculum Certificate Template from primary SPLMS Organization is set (if primary Organization changes, Curriculum Certificate will be updated). Use ‘Browse’ to select another certificate template:



**NOTE:** If user deletes default certificate or leaves this field empty, no certificate is used.

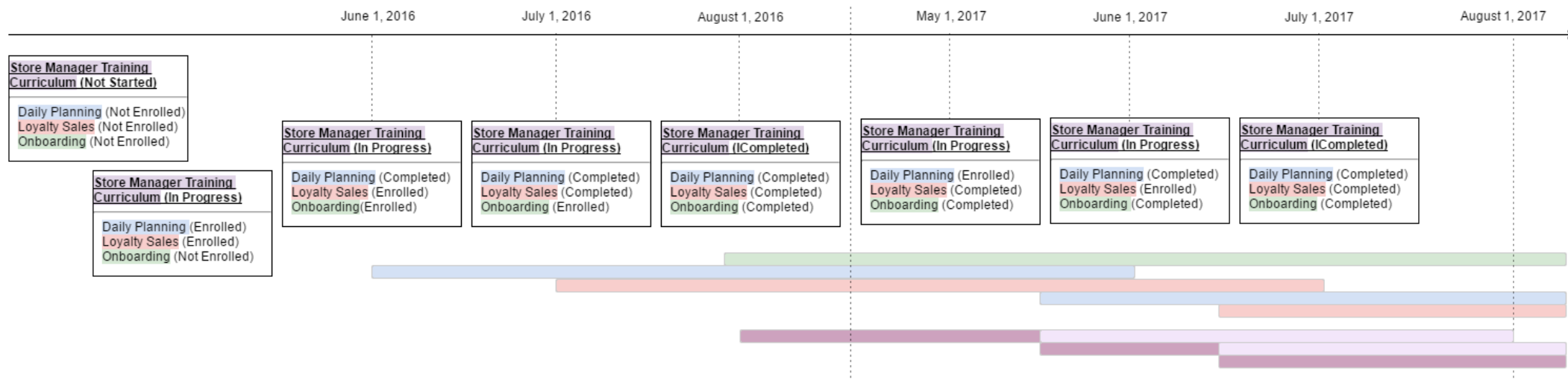
- Certificates Expiration – allows setting options for certificates expiration:
  - Never – select this option to disable certificate expiration;
  - Days after completion – select this option and set the number of days, after which the certificate for this course becomes expired;

- Date – select this option and set the date on which the certificate becomes expired;
- Email Notification Settings – specify the number of days before certificate expiration (multiple values are allowed separated by comma) when user is notified about it;

**NOTE:** Curriculum Certificate information is synchronized to Reporting Center database.



A curriculum is completed when there is a valid certificate issued for it. If no certificate is set for a curriculum it's completed when all its courses are completed. To make sure curriculum is retaken and completed before expiration of its certificate you might want to use the 'Auto Recertification' option. The example of curriculum life cycle is illustrated below:



We assume auto recertification feature is enabled for 'Daily Planning' and 'Loyalty Sales' courses. Certificate for 'Onboarding' course never expires. Certificates for the rest of courses and curriculum are issued for 365 days after their completion.

<b>NOTE:</b>	Expiration of Courses included in the curriculum does not influence expiration of the Curriculum Certificate.
<b>NOTE:</b>	If user is issued with a new valid Curriculum Certificate, the previous valid certificate becomes expired. The system does not expire certificates with 'Never' value set in Certificates Expiration settings.

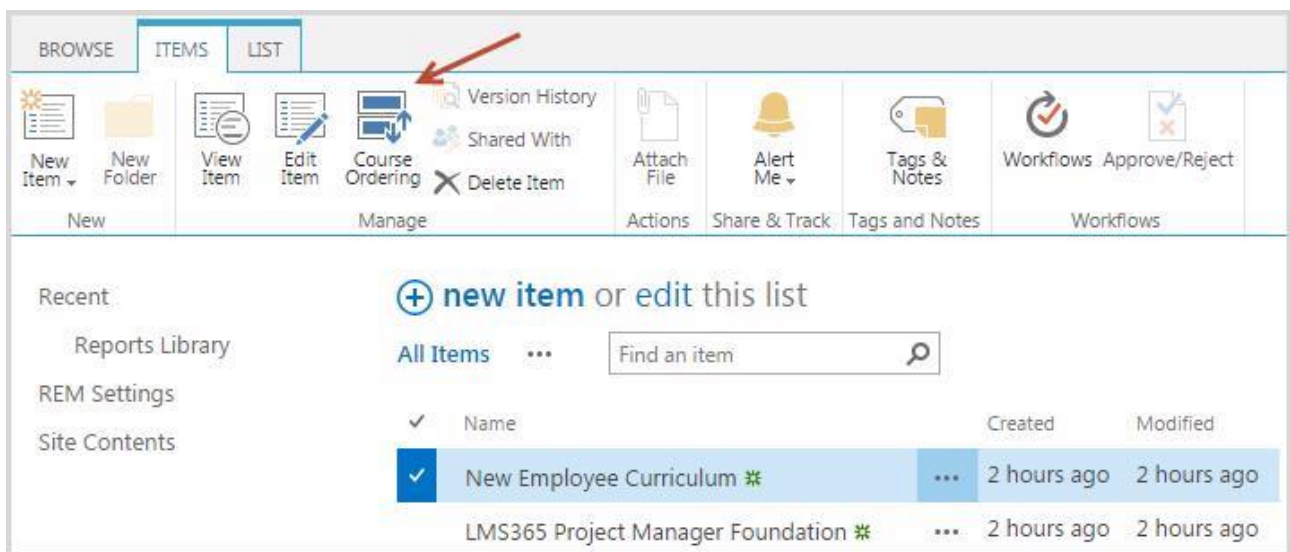
To view, edit or delete a Curriculum, follow the standard SharePoint scenario.

#### 4.1.11.1 Course Ordering

To set a specific order of passing Courses within the Curriculum, you can use Course Ordering functionality. It will allow Learners enroll only into the first Course of the Curriculum making next courses available only after completing all previous Courses.

To set Course Ordering for a Curriculum, do the following actions:

1. Select the needed Curriculum in the list of Curriculums and click 'Course Ordering' button in the ribbon menu:



2. Enable prerequisites functionality for this Curriculum by selecting 'Yes' option:

**Prerequisites** ✕

**Enable Prerequisites**  
 This setting determines whether courses should be passed by a learner in the forced sequential order.

**Enable Prerequisites?**  
 Yes  No

**Forced Sequential Order**  
 Under "Position from Top", select a number for each item. Set position to 'Not set' if you don't want include the item to the sequential order.

**Position from Top Name**

Not set ▼	Coffee Demo Classroom Training
Not set ▼	Demo Coffee Course
Not set ▼	Employee On-boarding Part I
Not set ▼	Employee On-boarding Part II

OK Cancel

3. Select order for passing courses within curriculum by selecting Position from top for each course:

**Prerequisites** ✕

**Enable Prerequisites**  
 This setting determines whether courses should be passed by a learner in the forced sequential order.

**Enable Prerequisites?**  
 Yes  No

**Forced Sequential Order**  
 Under "Position from Top", select a number for each item. Set position to 'Not set' if you don't want include the item to the sequential order.

**Position from Top Name**

1 ▼	Employee On-boarding Part I
2 ▼	Employee On-boarding Part II
3 ▼	Demo Coffee Course
Not set	Coffee Demo Classroom Training

OK Cancel

4. Click OK to save selected order of passing courses or Cancel to discard changes.

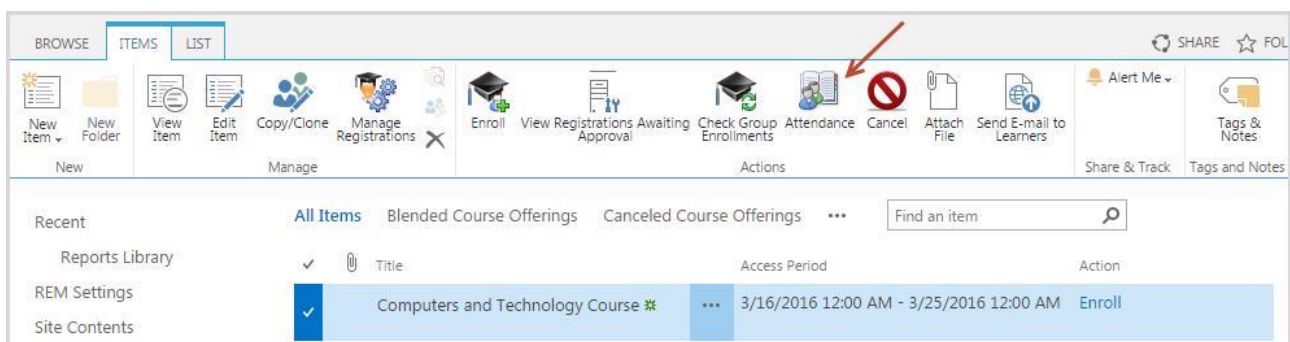
## 4.1.12 Timetable Templates Management

The Attendance tool allows marking the learners' attendance. For [Classroom Trainings](#) all students are listed in the table where every person is registered as attending the course hours of the current date or not. Every course hour is presented as a separate column in the table; under every column there are checkboxes that are used for setting the data: either checked or not. For [e-Learning](#) and [Blended Learning](#) user is redirected to the related LMS course attendance page.

### 4.1.12.1 Creating Timetable

To manage the learners' attendance, user should create a timetable. To do that, follow the steps given below:

1. Go to Course Offerings section;
2. Select a course offering and click Attendance button:




3. In the Attendance Tools select Timetable > New Item to create a new attendance period;
4. Fill in the open form (the fields marked with asterisk ( \* ) are required):


## Attendance › Time Table › Create New Period

Start Time \*   
 Examples of use: 13:45 — 1:45 PM or 07:32:45 — 7:32:45 AM

End Time \*   
 Examples of use: 13:45 — 1:45 PM or 07:32:45 — 7:32:45 AM

Week Days \*  
 Mon  
 Tue  
 Wed  
 Thu  
 Fri  
 Sat  
 Sun

Start Date \*  

End Date  

- *Start Time* – specify the start time of the period;
- *End Time* – specify the end time of the period;
- *Week Days* – select checkboxes near corresponding week days;
- *Start Date* – specify the start date of the period;
- *End Date* – specify the end date of the period.

5. Click OK to save the Timetable.

<b>NOTE:</b>	A Timetable can include several Attendance Periods.
<b>NOTE:</b>	Optionally you can save the current timetable in order to use it later. To do it, click the Export button (specify the path to save the timetable .csv file). To upload the previously saved timetable file, click the Import button and browse to the .csv file you intend to import.

#### 4.1.12.2 Editing Timetable

To edit existing Timetable, do the following:

1. Go to Course Offerings section;
2. Select a course offering and click Attendance button;
3. Click Timetable button. All Attendance Periods of the Timetable will be displayed:

# Attendance › Time Table

New Item   
 Sync With Template   
 Back

Period	Days	Start Date	End Date
08.00 - 10.45	Mon Wed Fri	3/17/2016	5/17/2016
10.00 - 14.00	Mon Tue Wed Thu Fri	3/15/2016	3/22/2016

A red arrow points to the 'Edit' option in the context menu for the first period.

- Click the drop-down arrow and select Edit. Editing Period form will be opened:

## Attendance › Time Table › Edit Period

Start Time \*   
 Examples of use: 13:45 — 1:45 PM or 07:32:45 — 7:32:45 AM

End Time \*   
 Examples of use: 13:45 — 1:45 PM or 07:32:45 — 7:32:45 AM

Week Days \*
 

- Mon
- Tue
- Wed
- Thu
- Fri
- Sat
- Sun

Start Date \*

End Date

- Make necessary changes and click OK to save changes.

### 4.1.12.3 Deleting Timetable

To delete existing period, do the following:

1. Go to Course Offerings section;
2. Select a course offering and click Attendance button;
3. Click Timetable button. All Attendance Periods of the Timetable will be displayed:

Period	Days	Start Date	End Date
08.00 - 10.45	Mon Wed Fri	3/17/2016	5/17/2016
10.00 - 14.00	Mon Tue Wed Thu Fri	3/15/2016	3/22/2016

4. Click the drop-down arrow and select Delete;
5. Click Delete to complete the deletion:

Warning! This operation can not be undone. Are you sure YOU want to delete?

Cancel Delete

#### 4.1.12.4 Marking Attendance

To mark learners' attendance, do the following:

1. Go to Course Offerings section;
2. Select a course offering and click Attendance button;
3. Table with Learners enrolled in the course offering and Attendance Periods of the Timetable will be displayed. To register attendance of the necessary learners check the boxes under the corresponding attendance periods:

# Attendance

Time Table | Export

Attendance

Page size: <All> | Group: Learners

February		March 2016					April
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
28	29	1	2	3	4	5	
6	7	8	9	10	11	12	
13	14	15	16	17	18	19	
20	21	22	23	24	25	26	
27	28	29	30	31	1	2	
3	4	5	6	7	8	9	

Student  10:00:00 - 14:00:00

Hank Moody

Harvey Spector

Learner 3

OK Cancel

4. Click Save to save changes.

#### 4.1.12.5 Viewing Classroom Training Attendance

There are two ways to view learners' attendance of the Classroom Training:

From Courses page:

1. Select the needed Classroom Training Course and click 'Manage Offerings' in the ribbon menu:

The screenshot shows the LMS ribbon menu with the following sections:

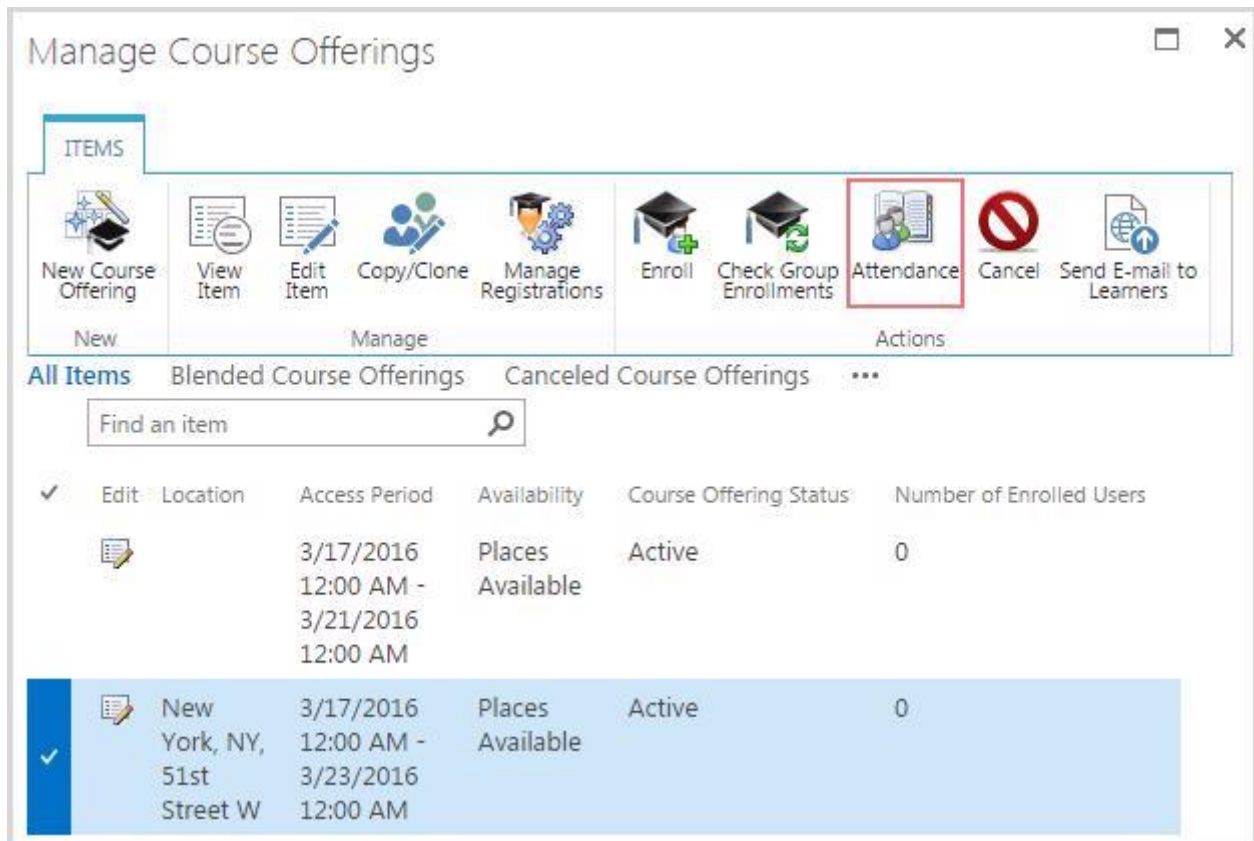
- BROWSE**: New Course, View Item, Edit Item, Manage Registrations, **Manage Offerings** (highlighted with a red box), Delete Item.
- Manage**: (empty)
- Actions**: Enroll Users, Go to Course, Synchronize Courses, Attach File, Send E-mail to Learners.

Below the ribbon, the 'Recent' section shows a list of items:

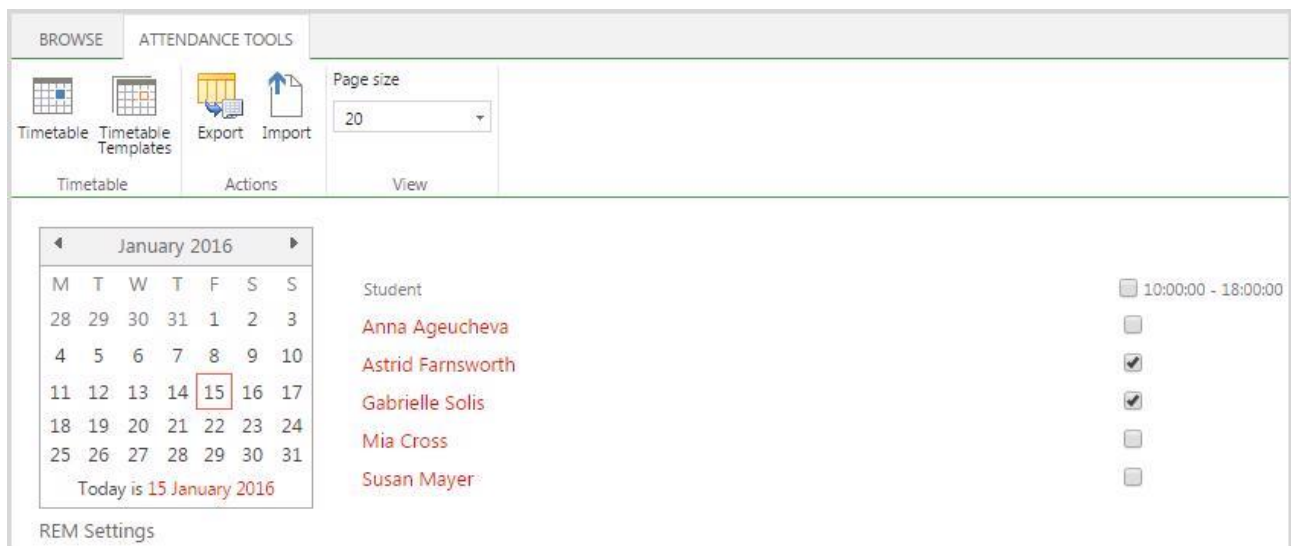
Item	Title	Short Description	Teachers	Start Date	Organization
REM Settings	New Course	short description	Anna Annaaaaa	3/17/2016 12:00 AM	
Site Contents	*	text			

2. Select the needed Course Offering and click 'Attendance' in the ribbon menu:



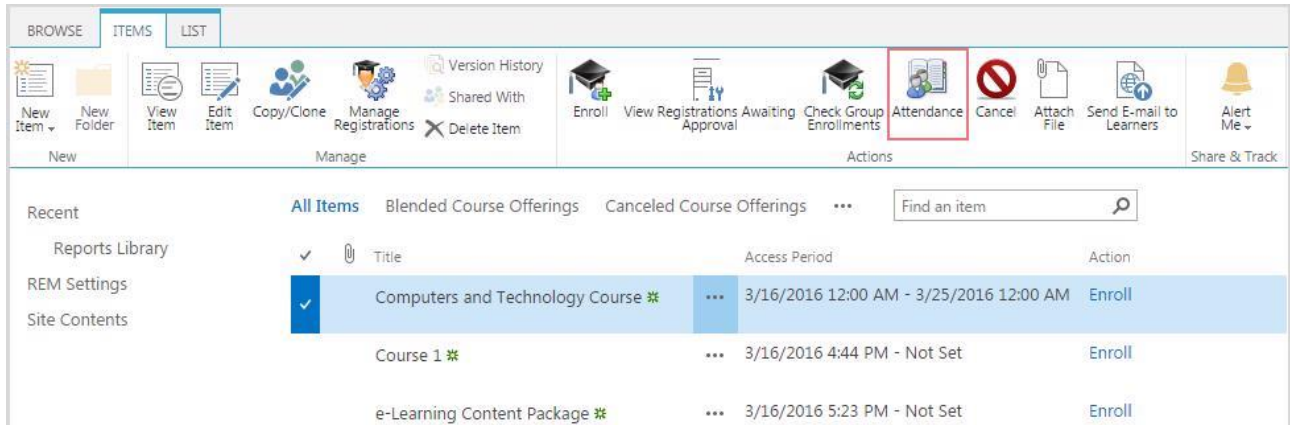


3. A corresponding Attendance page will be opened in a modal window allowing to view and mark Learners' attendance:

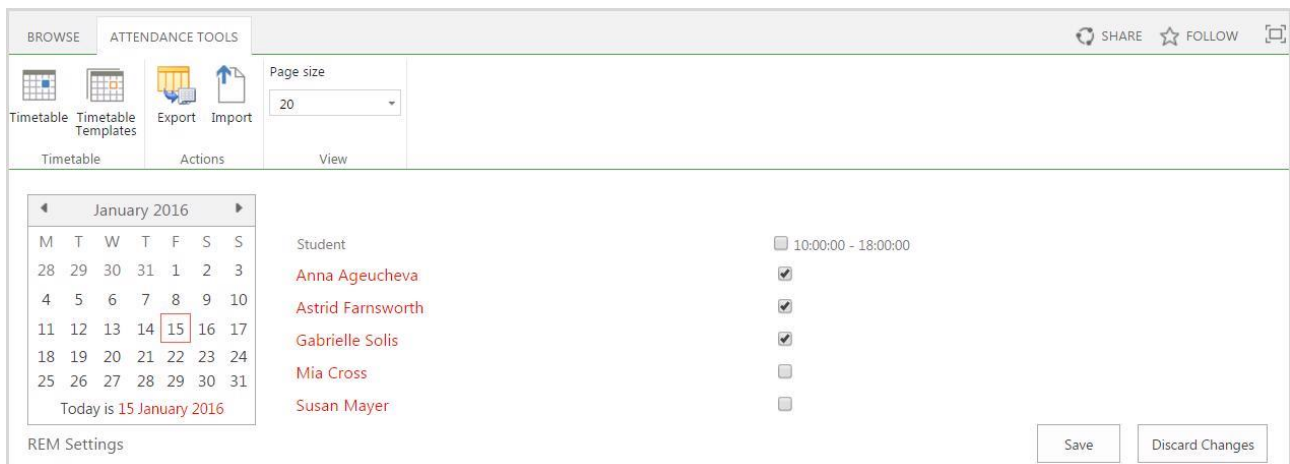


From Course Offerings page:

1. Check the box against the needed Classroom Training and click the Attendance button on the ribbon menu:



- You will be redirected to the corresponding course Attendance page, where you can check the attendance marks:



The home page of this section proposes a table of attendance for the current date. A user can pass to other dates that have already passed by selecting a necessary day in the calendar. To browse a date, select a necessary date in the Calendar in the top left corner of the page and click it.

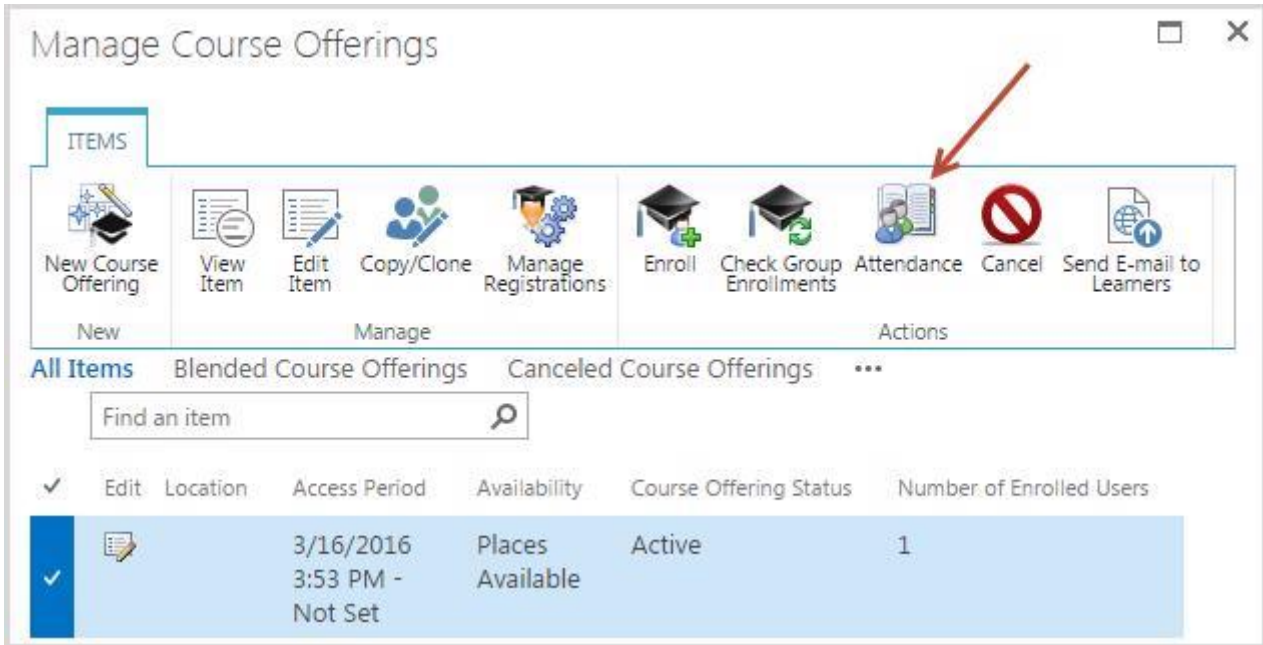
**NOTE:** It is possible for students to view their attendance too.

#### 4.1.12.6 Viewing e-Learning and Blended Learning Courses Attendance

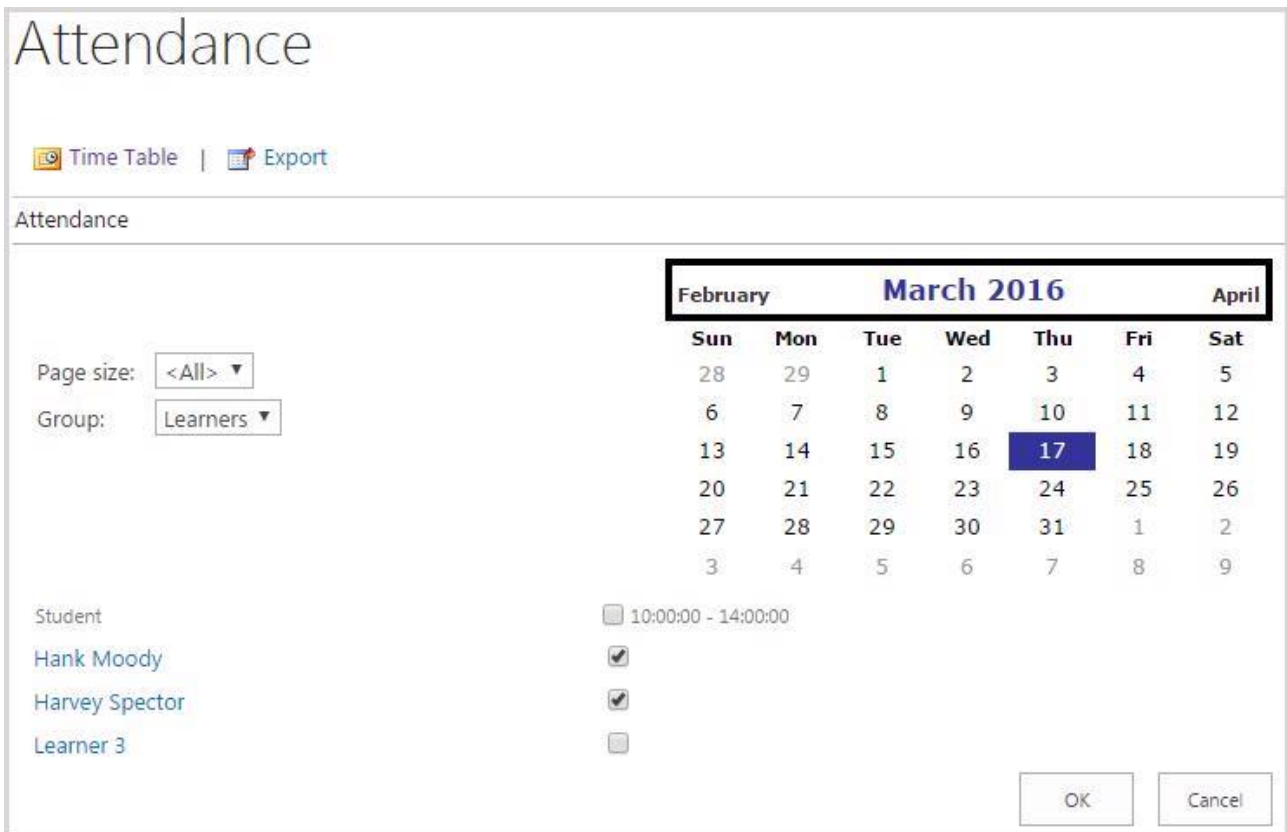
There are two ways to view learners' attendance of e-Learning or Blended Learning courses:

*From Courses page:*

- Select the needed e-Learning or Blended Training Course and click 'Manage Offerings' in the ribbon menu:



2. An Attendance page from corresponding LMS course will be opened in a modal window allowing to view and mark Learners' attendance:



From Course Offerings page:

1. Check the box against the needed e-Learning or Blended course and click the Attendance button on the ribbon menu:

BROWSE ITEMS LIST

New Item New Folder View Item Edit Item Copy/Clone Manage Registrations Version History Shared With Delete Item

Enroll View Registrations Approval Awaiting Check Group Enrollments Attendance Cancel Attach File Send E-mail to Learners Alert Me

Recent All Items Blended Course Offerings Canceled Course Offerings Find an item

✓	Title	Access Period	Action
✓	Computers and Technology Course #	3/16/2016 12:00 AM - 3/25/2016 12:00 AM	Enroll
	Course 1 #	3/16/2016 4:44 PM - Not Set	Enroll
	e-Learning Content Package #	3/16/2016 5:23 PM - Not Set	Enroll

2. You will be redirected to the LMS course Attendance section:

# Attendance

Time Table | Export

Attendance

Page size: <All> Group: Learners

February	March 2016						April
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
28	29	1	2	3	4	5	
6	7	8	9	10	11	12	
13	14	15	16	17	18	19	
20	21	22	23	24	25	26	
27	28	29	30	31	1	2	
3	4	5	6	7	8	9	

Student  10:00:00 - 14:00:00

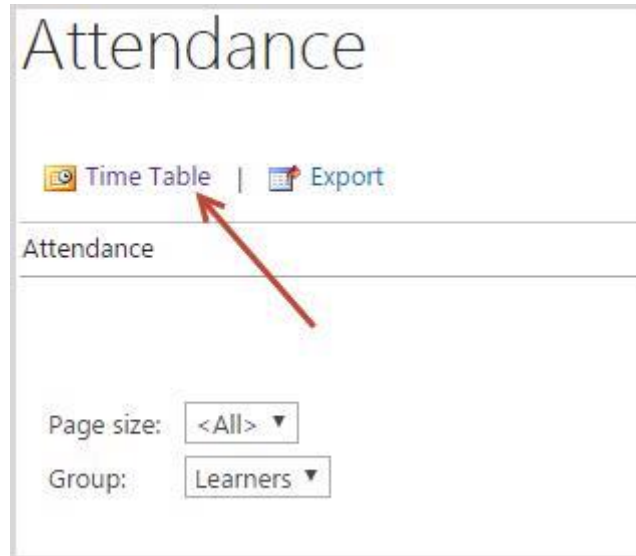
Hank Moody

Harvey Spector

Learner 3

OK Cancel

3. Click the Timetable to create a new learners' timetable:




4. Click the New Item icon in the ribbon. Complete the following information:


Attendance › Time Table › Create New Period

Start Time \*   
Examples of use: 13:45 — 1:45 PM or 07:32:45 — 7:32:45 AM

End Time \*   
Examples of use: 13:45 — 1:45 PM or 07:32:45 — 7:32:45 AM

Week Days \*  
 Mon  
 Tue  
 Wed  
 Thu  
 Fri  
 Sat  
 Sun

Start Date \*  

End Date  

5. Click OK to save the timetable period; the new timetable will now appear:

# Attendance › Time Table

 New Item    Sync With Template

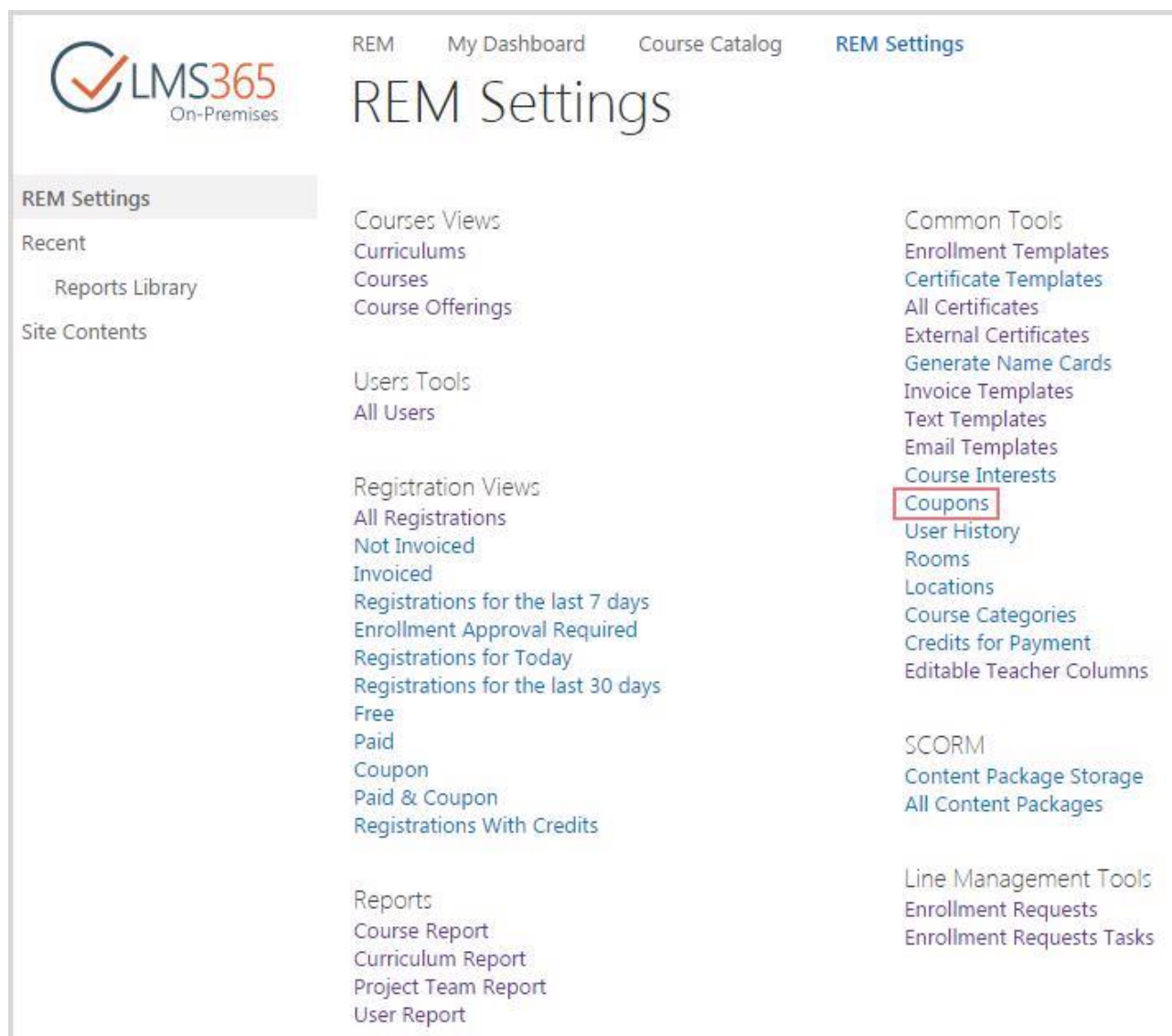
 Back

Period	Days	Start Date	End Date
08.00 - 10.45	Mon Wed Fri	3/17/2016	5/17/2016

6. Click Back () to be redirected to the Attendance section.


## 4.1.13 Coupons Management

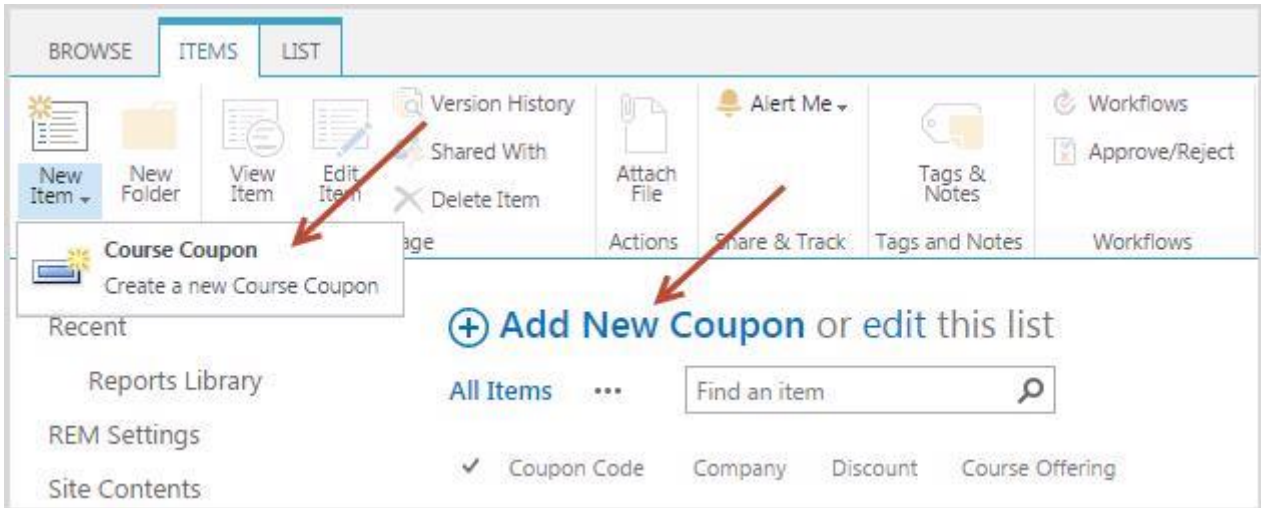
The Coupons tool allows the course administrator to set a discount for a certain Course Offering. A user can get a discount by entering a coupon code. The amount of discount is determined by the course administrator (in the range of 0 – 100%). You can create more than one coupon for a Course Offering:



The screenshot shows the LMS365 On-Premises interface. The top navigation bar includes 'REM', 'My Dashboard', 'Course Catalog', and 'REM Settings'. The main heading is 'REM Settings'. On the left sidebar, 'REM Settings' is selected, with sub-items 'Recent' and 'Reports Library'. The main content area is divided into three columns. The first column lists 'Courses Views' (Curriculums, Courses, Course Offerings), '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), and 'Reports' (Course Report, Curriculum Report, Project Team Report, User Report). The second column lists '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), and 'Line Management Tools' (Enrollment Requests, Enrollment Requests Tasks). The 'Coupons' link in the 'Common Tools' section is highlighted with a red box.

To create a Coupon, do the following:


1. Go to the Coupons section;
2. On the ribbon menu go to Items > New Item > Course Coupon or click Add New Coupon button :





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



**Coupons - New Item** ✕


EDIT


  
Save

  
Cancel

  
Paste



  
Cut  
  
Copy

  
Attach File

  
Spelling

Commit      Clipboard      Actions      Spelling

Coupon Code \*

Course Offering \*   

Company

Discount \*  %

- *Coupon Code* – enter a coupon code that corresponds to a certain discount amount;
- *Course* – select a course to which the coupon applies;
- *Company* – enter the name of the company that provided a coupon;
- *Discount* – enter the amount of discount (from 0 to 100 off the course price).

4. Click Save to create a coupon. The created coupon will appear in the list.

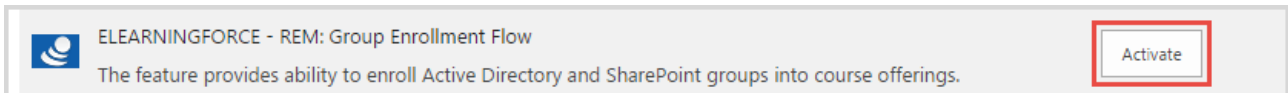
To edit or delete a coupon, follow the standard SharePoint scenario.



## 4.1.14 Group Enrollments

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

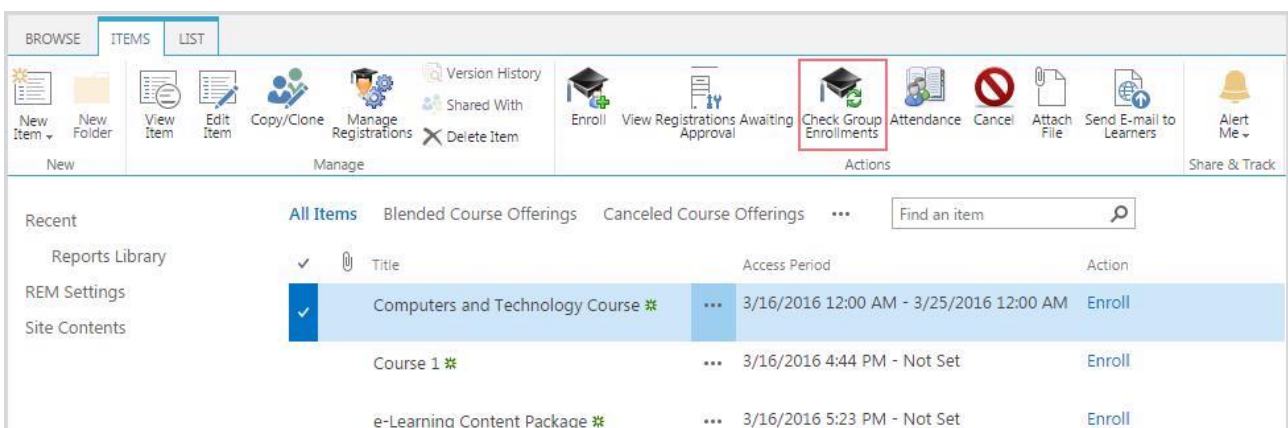
1. On the REM welcome page, go to the Settings > Site Settings section;
2. Go to the Site Collection Administration > Site collection features section;
3. Activate the REM Group Enrollment Flow site collection feature:



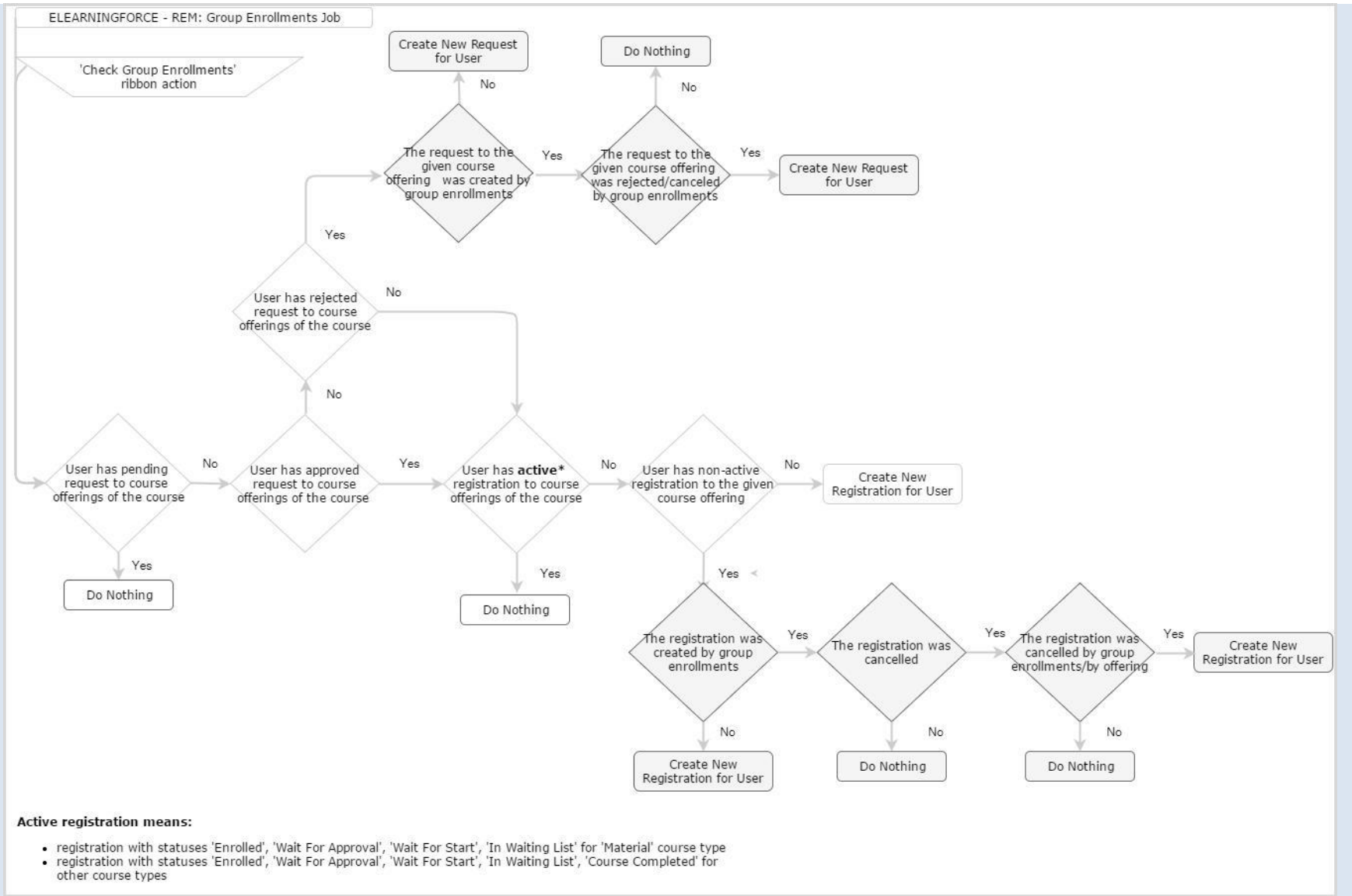
**NOTE:** To enable Group enrollment flow feature make sure that ELEARNINGFORCE – REM: Group Enrollments Timer Job feature is activated for web application.

If site collection feature is activated, AD and REM groups could be enrolled by two ways:

1. User can enroll groups from enrollment form via user picker. To enroll a whole group, enter group title in the login name field and fill in the form as described in section 4.1.10.9 [Enrolling Users from Course Offerings](#). Group enrollment could be long operation depending on how many groups are enrolled and how many users these groups contain;
2. User can set groups for *forced enrollment* during editing or creating course offerings. For more information see sections 4.1.10.1 [Creating Course Offerings](#) and 4.1.10.3 [Editing Course Offerings](#). Members of these groups will automatically be enrolled with delay by REM Group Enrollments Timer Job. To enroll them immediately click Check Group Enrollments button on the ribbon on the Course Offerings list (you can select several course offerings that will be processed):



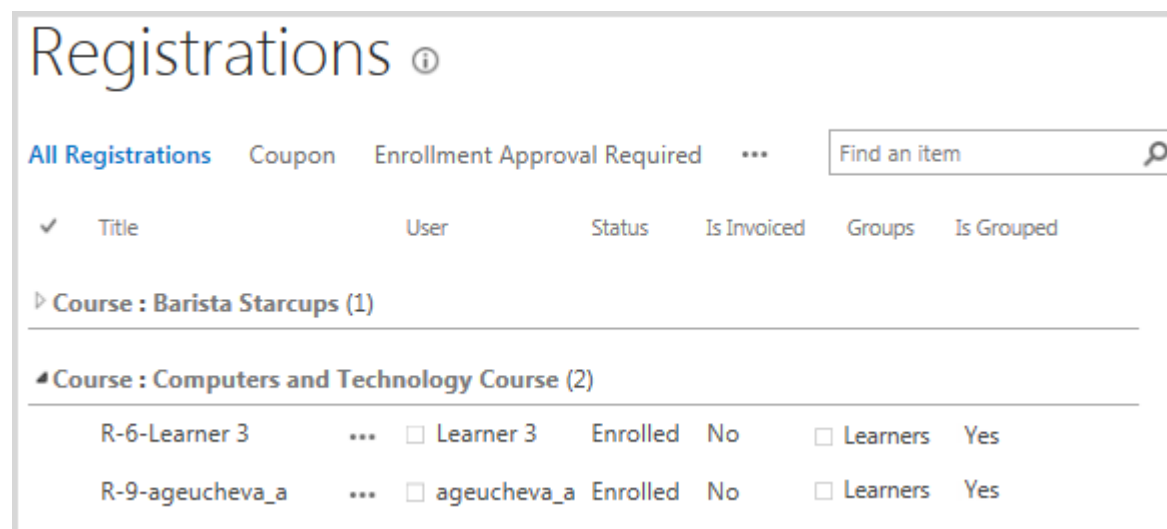
**NOTE:** The following logic is applied when group enrollment is checked:



Active registration means:

- registration with statuses 'Enrolled', 'Wait For Approval', 'Waiting For Start Date', 'In Waiting List' for 'Material' course type;
- registration with statuses 'Enrolled', 'Wait For Approval', 'Waiting For Start Date', 'In Waiting List', 'Course Completed' for other course types.

To view information related to group enrollments, modify view in Registrations list and add fields with additional information:



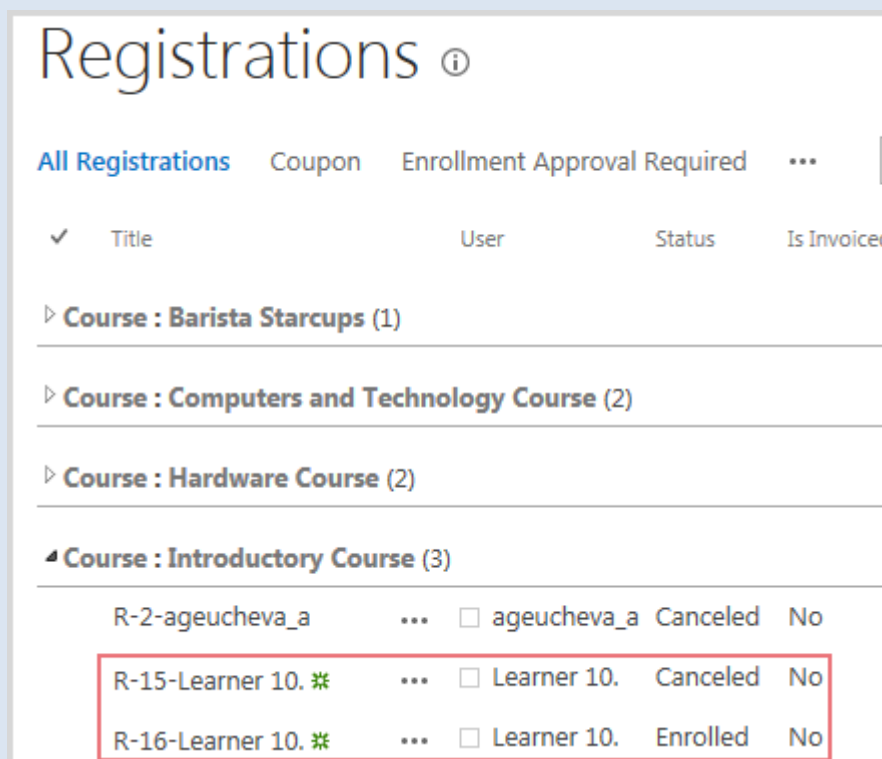
✓	Title	User	Status	Is Invoiced	Groups	Is Grouped
▶ Course : Barista Starcups (1)						
▲ Course : Computers and Technology Course (2)						
	R-6-Learner 3	... <input type="checkbox"/> Learner 3	Enrolled	No	<input type="checkbox"/> Learners	Yes
	R-9-ageucheveva_a	... <input type="checkbox"/> ageucheveva_a	Enrolled	No	<input type="checkbox"/> Learners	Yes

- Groups – shows names of the AD or REM groups which registration belongs to. This field can contain several groups, if user is a member of several groups enrolled to course offering;
- Is Grouped – indicates whether registration belongs to any group or not.

- Groups – shows names of the AD or REM groups which registration belongs to. This field can contain several groups, if user is a member of several groups enrolled to course offering;
- Is Grouped – indicates whether registration belongs to any group or not.

**NOTE:** If user is enrolled through Group Registration, then Enrollment requests are only created for the direct Line Manager not to Group Line Manager (in case both line managers are assigned to the group and user).

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



✓	Title	User	Status	Is Invoiced
▶	<b>Course : Barista Starcups (1)</b>			
▶	<b>Course : Computers and Technology Course (2)</b>			
▶	<b>Course : Hardware Course (2)</b>			
▲	<b>Course : Introductory Course (3)</b>			
	R-2-ageucheva_a	...	<input type="checkbox"/> ageucheva_a	Canceled No
	R-15-Learner 10. ✱	...	<input type="checkbox"/> Learner 10.	Canceled No
	R-16-Learner 10. ✱	...	<input type="checkbox"/> Learner 10.	Enrolled No

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

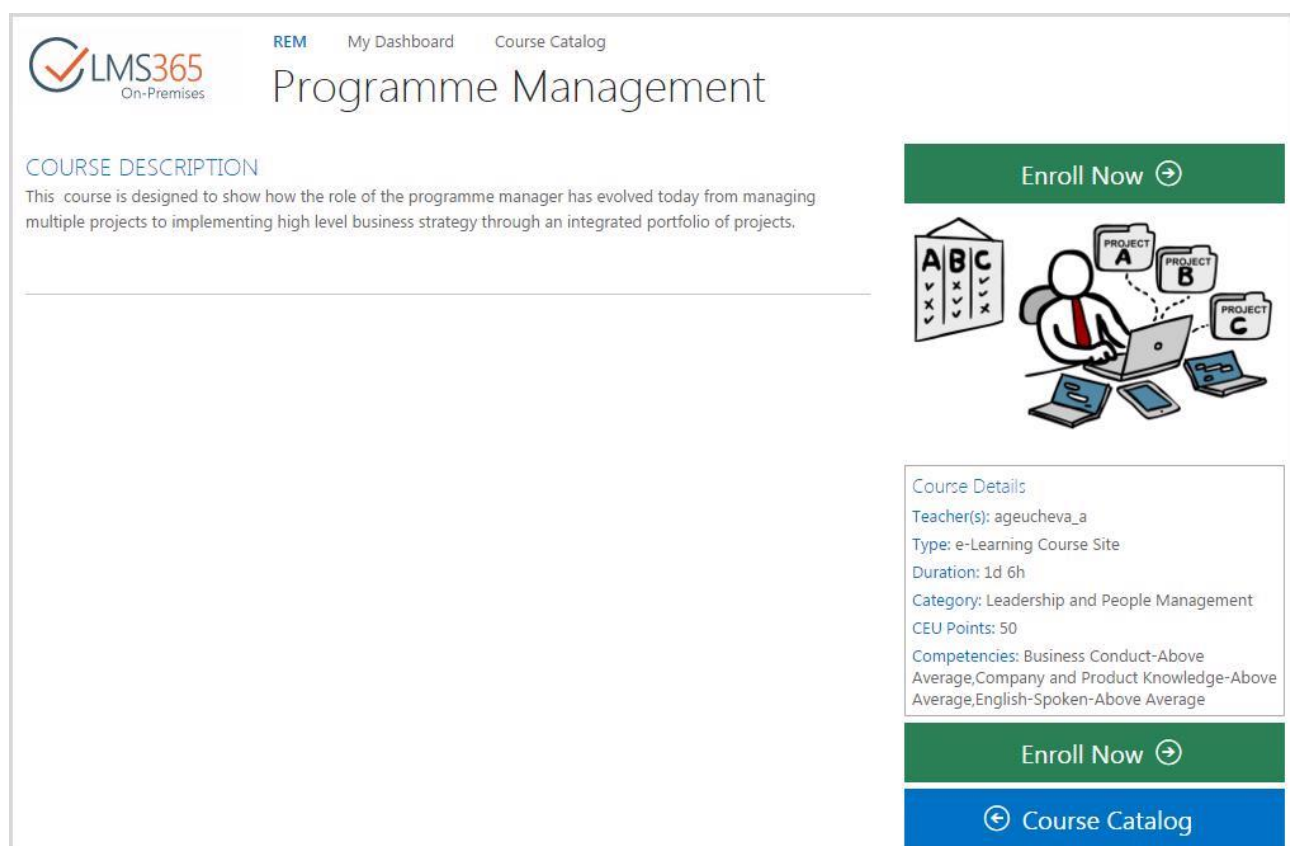
#### 4.1.15 Details Content Pages

For each course the following pages are created:

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

#### 4.1.15.1 Course Details Page

[CourseType]CourseDetails.aspx is a page designed for display of information about the selected course in a way that can be easily customized:



The screenshot shows the LMS365 On-Premises interface. At the top, there are navigation links for 'REM', 'My Dashboard', and 'Course Catalog'. The main heading is 'Programme Management'. Below this, there is a 'COURSE DESCRIPTION' section with the text: 'This course is designed to show how the role of the programme manager has evolved today from managing multiple projects to implementing high level business strategy through an integrated portfolio of projects.' To the right of the description is a large green 'Enroll Now' button with a right-pointing arrow. Below the button is an illustration of a person sitting at a desk with a laptop, surrounded by icons for 'PROJECT A', 'PROJECT B', and 'PROJECT C'. Further down, there is a 'Course Details' section with the following information: Teacher(s): ageucheva\_a; Type: e-Learning Course Site; Duration: 1d 6h; Category: Leadership and People Management; CEU Points: 50; Competencies: Business Conduct-Above Average, Company and Product Knowledge-Above Average, English-Spoken-Above Average. At the bottom right, there is another green 'Enroll Now' button and a blue 'Course Catalog' button with a left-pointing arrow.

The page contains the following web parts:

1. Course Details – it is a new web part provided by common solution and called *List Item Details* in the web part gallery. The web part on this page displays course details according to the configured HTML template;
2. 'Enroll Now' button – the web part provides the link button that navigates to the selection of Course Offering for enrollment. The button is displayed for users that are not enrolled to that Course. For users who are already enrolled to the Course 'Go to Course' button is displayed;

3. Course Catalog button – the web part provides the link button that navigates back to Course Catalog Search page;
4. Event Details – the web part shows information about the course offering(s).

All attachments on course details page are by default opened in a new browser tab. This behavior can be changed in 'Launch Behavior' web part settings:

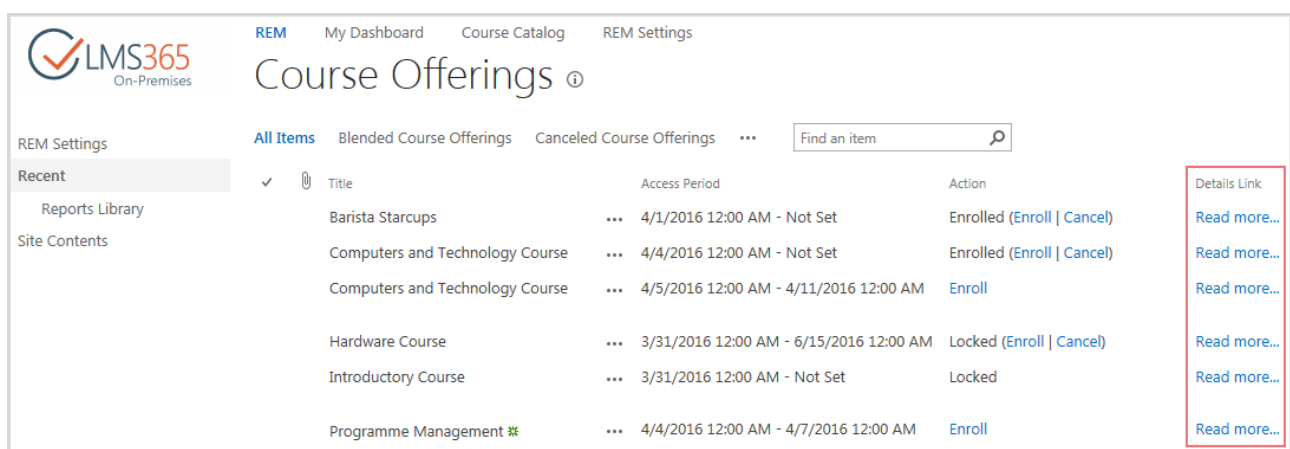


- In page navigation – the document will be opened inside the current page;
- Dialog – a dialog will be displayed for selection of launch behavior;
- New tab – the document will be opened in a new browser tab.

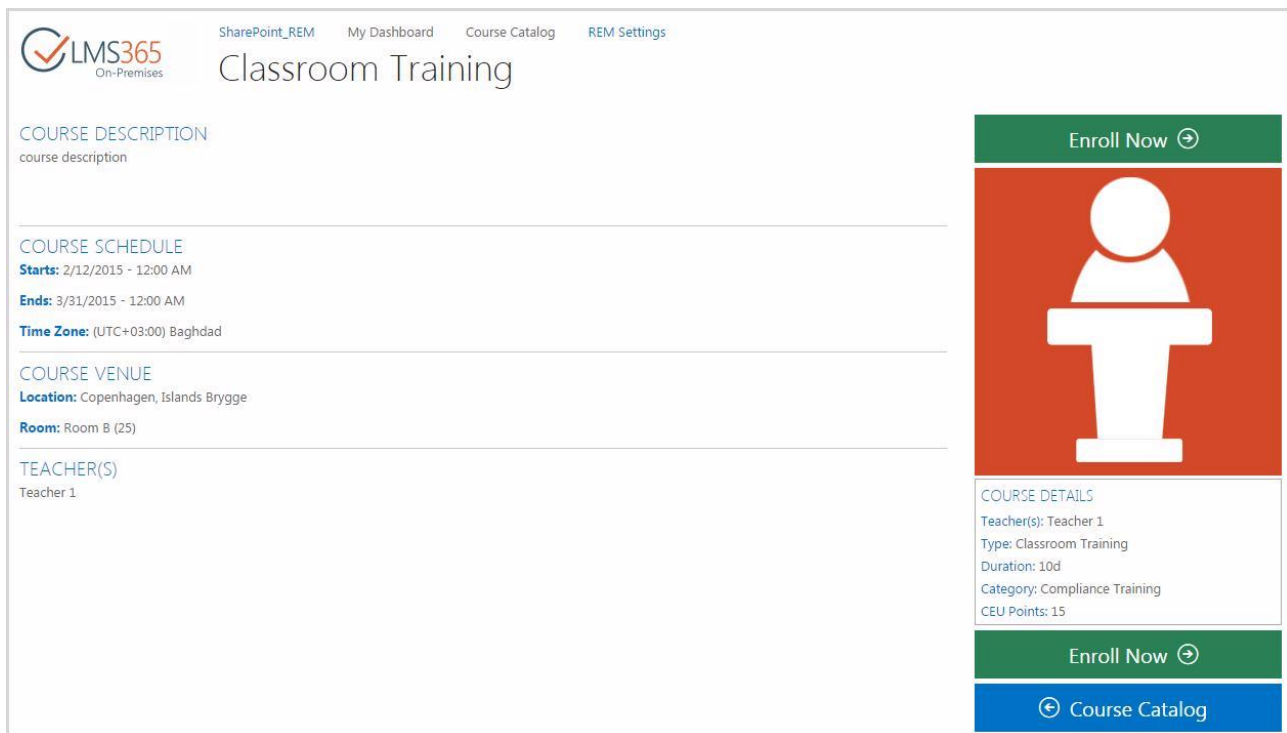
**NOTE:** These options are applicable only when 'Allow open attachments via office apps' option is enabled and Office Web Apps are configured on the server. Otherwise attached documents will be downloaded to user's local computer instead of launching in browser.

#### 4.1.15.2 Course Offering Details Page

[CourseType]CourseOfferingDetails.aspx is a page designed for display of information about the selected course offering. It can be accessed from the 'Read more...' column found in the course offerings list used to display details specifically for the selected offering:



The page contains the following web parts:



The screenshot displays the 'Classroom Training' course page in the LMS365 interface. At the top, there are navigation links for 'SharePoint\_REM', 'My Dashboard', 'Course Catalog', and 'REM Settings'. The main content area is divided into several sections: 'COURSE DESCRIPTION' (with a placeholder 'course description'), 'COURSE SCHEDULE' (listing start and end dates and time zone), 'COURSE VENUE' (listing location and room), and 'TEACHER(S)' (listing 'Teacher 1'). On the right side, there is a prominent 'Enroll Now' button with a right-pointing arrow, a large red icon of a person at a podium, and a 'COURSE DETAILS' box containing information like 'Teacher(s): Teacher 1', 'Type: Classroom Training', 'Duration: 10d', 'Category: Compliance Training', and 'CEU Points: 15'. Below the details box is another 'Enroll Now' button and a 'Course Catalog' button with a left-pointing arrow.

- Course Description – displays course long description;
- Course Schedule – displays information about course start and end date and time and time zone set for it (only for Classroom Training, Blended and Webinar courses);
- Course Venue – displays information about Location and Room where the training will be held (only for Classroom Training and Blended courses);
- Teacher(s) – shows names of Teacher and Additional Teachers (only for Classroom Training, Blended and Webinar courses);
- 'Enroll Now' button – the web part provides the link button that navigates to the selection of Course Offering for enrollment. The button is displayed for users that are not enrolled to that Course. For users who are already enrolled to the Course 'Go to Course' button is displayed;
- Course Catalog button – the web part provides the link button that navigates back to Course Catalog Search page;
- Training Materials – is displayed for Material course types only. It includes materials added to the Course Materials field of the Course Offering. It may contain text description, links, attached documents, embedded video – all materials should be read and understood in the course;
- Material Confirm button – this button is displayed for Material course types only. Clicking this button Learner acknowledges that he has read and understood course materials. It can be configured in the Course Offering advanced settings in two variants:



E-Signature

Created at 3/16/2015 12:47 PM by  Teacher 1

Simple Check Box ▼  
Simple Check Box  
Authorization

- Simple Check Box – a checkbox with “I Agree” option is added next to the button:

**Terms And Conditions**

By clicking on the confirmation button I am acknowledging that I have completed this training.

I Agree

Confirm ✓

- Authorization - a password field is added next to the “Confirm” button:

**Terms And Conditions**

By clicking on the confirmation button I am acknowledging that I have completed this training and my password is my signature.

Your password

Confirm ✓

**NOTE:** Training Materials and Confirm button web parts are available on the offering details page to expose materials directly for open courses, and bypass additional clicks on enrollment. Confirmation web part is only available for offerings with automatic approval and free payment type. Once user confirms he read the materials, a registration item is automatically created in ‘Course Completed’ status. For all the sensitive materials where enrollment process is required these web parts are placed to the registration details page.

#### 4.1.15.3 [Registration Details Page](#)

*[CourseType]RegistrationDetails.aspx* page is available for enrolled learners only. For all other users “Page Not Found” error is displayed.

It is opened by “Read more...” link in the Course Catalog if learner is already enrolled in the course or by “Go to Course” link after he has enrolled from Course Details page, and contains the following information:

SharePoint LMS - Learning Management Suite for SharePoint Newsfeed OneDrive Sites Mary Jane Stevens ?

SHARE FOLLOW

**THE AMERICAN BARISTA & COFFEE SCHOOL** Courses Administration Course Catalog My Dashboard

## Coffee Demo Classroom Training

**COURSE DESCRIPTION**  
 The class room based course for the Coffee Demo demonstrates the capabilities of the "classroom" course type.  
 This is the "long description" field.  
 ....  
[+ READ MORE](#)

**COURSE DETAILS**  
 Type: Classroom Training  
 Duration: 8h  
 Category: General Workplace Training

---

**COURSE SCHEDULE**  
**Starts:** 08/06/2015 - 00:00  
**Ends:** Not Set - Not Set  
**Time Zone:** (UTC+01:00) Brussels, Copenhagen, Madrid, Paris

---

**COURSE VENUE**  
**Location:** Not Set  
**Room:** Not Set

---







**TEACHER(S)**  
 Teacher 1

- Course Details – displays course description; course schedule – access period and time zone; Teachers of the course offering;
- Course Details – shows short information about the course;
- Course Offering Details – contains learning information depending on the course type:
- *My Learning Modules* – this web part is displayed for e-Learning and Blended course types, allows passing Learning objects:

### My Learning Modules

<b>Introduction</b>	Completed	✔
<b>General Information</b>	Not Started	▶
<b>Accounting</b>	Not Started	🔒
<b>Company Principles</b>	In Progress	▶
<b>General Methods</b>	In Progress	⏸
<b>Test</b>	Out Of Attempts	✖

The following buttons appear for learning objects depending on their status:

-  **Start** user does not have any attempts;
-  **Locked** user has not completed prerequisites for the item;
-  **New Attempt** user had some attempts and did not pass them;
-  **Completed** user had some attempts and passed them;
-  **Continue** user had some attempts but did not complete them;
-  **Out of Attempts** user has no more attempts.

When a certificate is granted for the completed item user can view it by clicking the certificate icon (📄) next to the item.

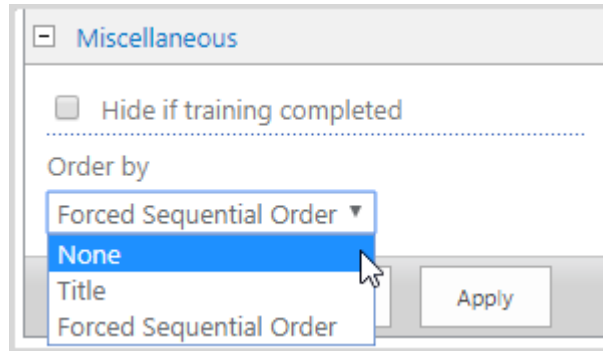
This web part changes depending on Learner’s registration status:

Registration status	Displayed Information	Available actions
<b>Wait for Approval</b>	web part not displayed	-
<b>In Waiting List</b>	web part not displayed	-
<b>Enrolled</b>	current progress displayed	start new attempt, continue attempt
<b>Course Completed</b>	100% completed	no ability to start attempt
<b>Canceled</b>	web part not displayed	-
<b>Certificate Expired</b>	100% completed	no ability to start attempt
<b>Course Not Completed</b>	current progress displayed	no ability to start attempt

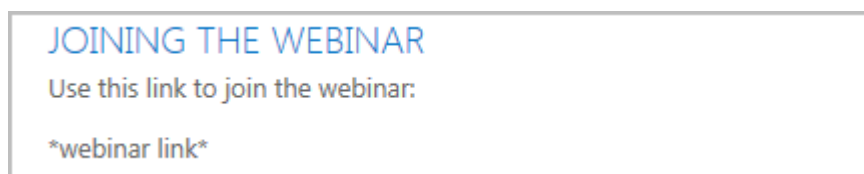
It is possible to change order of items on this web part. To do this, edit the web part:



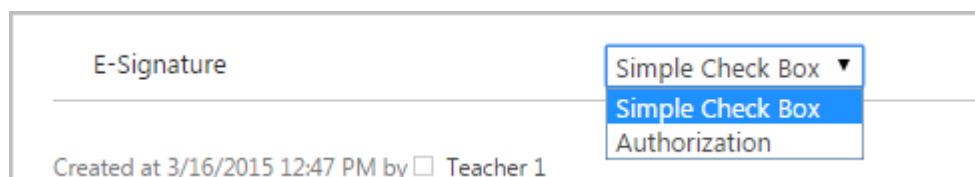
In the Miscellaneous section you can select how to order the learning objects on the web part:



- None – items are sorted by the time they were created;
  - Title – all items are sorted in the alphabetical order;
  - Forced Sequential Order – all items are sorted in the order specified for passing on the LMS course.
- *Joining the Webinar* – this web part is displayed only for Webinar course types, contains link to the webinar added to the Course Offering 'Meeting Invitation' field:



- *Training Materials* – is displayed for Material course types only. It includes materials added to the Course Materials field of the Course Offering. It may contain text description, links, attached documents, embedded video – all materials should be read and understood in the course;
- *Material Confirm button* – this button is displayed for Material course types only. Clicking this button Learner acknowledges that he has read and understood course materials. It can be configured in the Course Offering advanced settings in two variants:



- Simple Check Box – a checkbox with “I Agree” option is added next to the button:

**Terms And Conditions**

By clicking on the confirmation button I am acknowledging that I have completed this training.

I Agree

**Confirm** ✓

- Authorization - a password field is added next to the "Confirm" button:

**Terms And Conditions**

By clicking on the confirmation button I am acknowledging that I have completed this training and my password is my signature.

Your password

**Confirm** ✓

For *completed* courses a message confirming Course Completion with a link to My Dashboard is displayed:

Huber Demo Course □ ×

**COURSE DESCRIPTION**  
A demo course for all Huber employess


---

**Training Completed**  
You have completed this training. Go to [My Dashboard](#) to get the full overview of your training...
✓

**My Learning Modules**  
There are no items to show in this view.

---

**GO TO FULL COURSE SITE FOR ADDITIONAL RESOURCES & INFORMATION**



**COURSE DETAILS**  
 Type: e-Learning Course Site  
 Duration: 1d  
 Category: Compliance Training  
 Competencies: Self Management-Knowing Your Job

The following message is displayed for *completed* courses for Material course types:

**TRAINING MATERIALS**

The below document(s) should be read and understood:

LIA RFC (v1.0) (1 MB)

Reading Completed
✓

You indicated that you have already read this document

**COURSE DETAILS**

Type: Material

Category: Compliance Training

CEU Points: 10

#### 4.1.15.4 Details Link Field

Links to the Details pages can be added to Courses list and Course Offerings list. To add these links modify the list view and check the Details Link:

<input checked="" type="checkbox"/>	Details Link (Read more)	8	▼
<input checked="" type="checkbox"/>	Title	9	▼

The link will be displayed in a separate column in the list:

REM
My Dashboard
Course Catalog
REM Settings

## Course Offerings ⓘ

REM Settings

Recent

Reports Library

Site Contents

All Items

Blended Course Offerings

Canceled Course Offerings

...

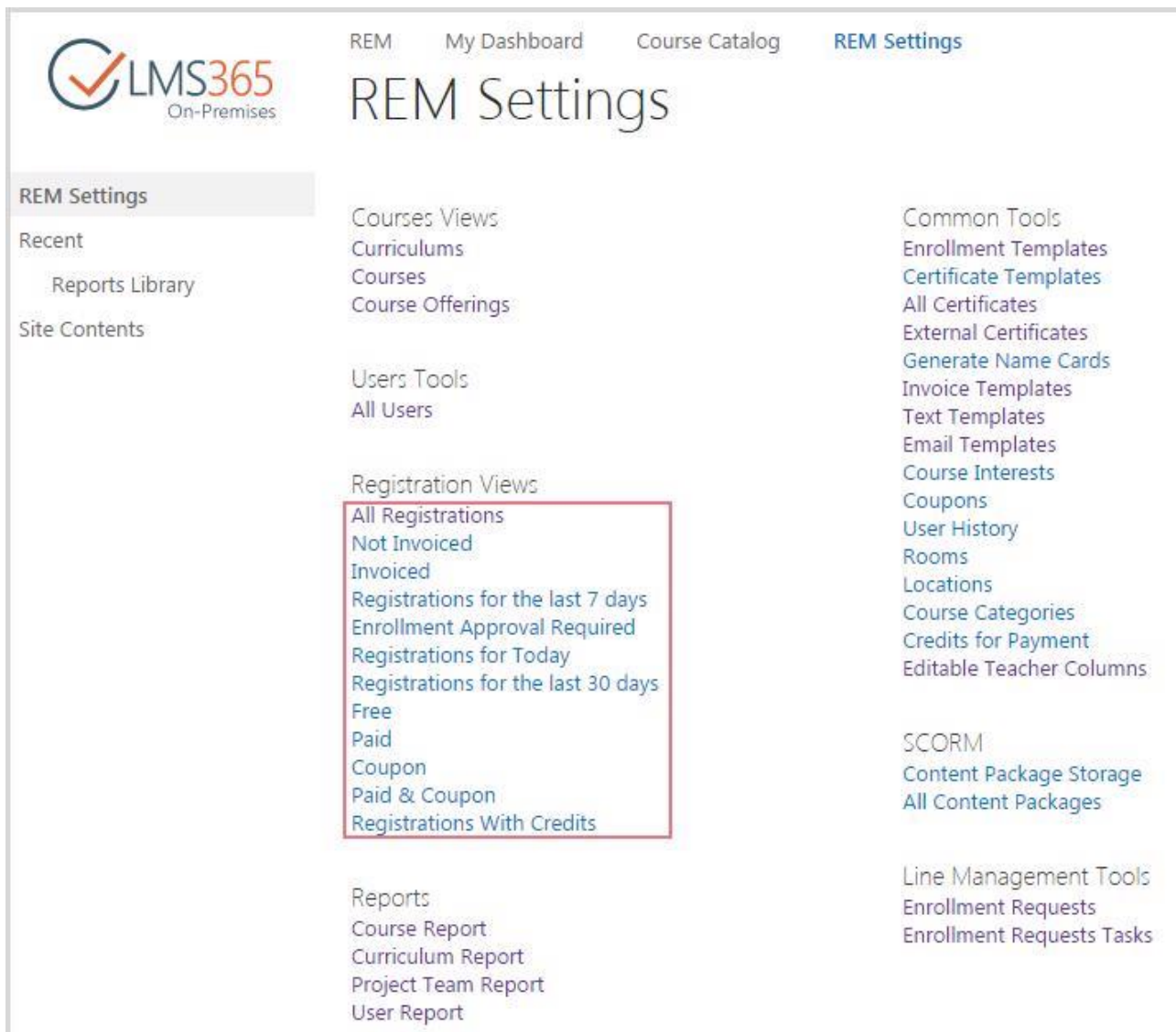
Find an item

			Title	Access Period	Action	Details Link
✓	📎	...	Barista Starcups	4/1/2016 12:00 AM - Not Set	Enrolled (Enroll   Cancel)	Read more...
		...	Computers and Technology Course	4/4/2016 12:00 AM - Not Set	Enrolled (Enroll   Cancel)	Read more...
		...	Computers and Technology Course	4/5/2016 12:00 AM - 4/11/2016 12:00 AM	Enroll	Read more...
		...	Hardware Course	3/31/2016 12:00 AM - 6/15/2016 12:00 AM	Locked (Enroll   Cancel)	Read more...
		...	Introductory Course	3/31/2016 12:00 AM - Not Set	Locked	Read more...
		...	Programme Management ✳	4/4/2016 12:00 AM - 4/7/2016 12:00 AM	Enroll	Read more...

#### 4.1.16 Registrations Management

The Registration Views section allows the REM administrator viewing and editing users' registrations, approving learner's enrollments in a course and sending invoices to learners.

A user has an option to select among the following views:



- *All Registrations* – displays a list of all users’ registrations;
- *Not Invoiced* – displays a list of users’ registrations that have not been invoiced yet;
- *Invoiced* – displays a list of users’ registrations that have already been invoiced;
- *Registration for the Last 7 Days* – displays a list of users, who registered for the course within last week;
- *Enrollment Approval Required* – displays the list of users waiting for approval. An administrator can approve and enroll the user if there is a free space in the course, and send them an invoice;
- *Registrations for Today* – displays a list of currently created users’ registrations;
- *Registrations the Last 30 Days* – displays registrations made within the last month;
- *Free*– displays a list of users’ registrations with *Free* payment type;
- *Paid* – displays a list of users’ registrations with *Paid* payment type;
- *Coupon* – displays a list of users’ registrations with *Coupon* payment type;

- *Paid & Coupon* – displays a list of users’ registrations both with *Paid* and *Coupon* payment type;
- *Registration With Credits* – displays a list of users’ registrations with *Credit* payment type.

**NOTE:** Note please that there is also In Waiting List registration Status. Since it is not presented in the Registration Views section, however it can be available when viewing All Registrations section as the registration Status.

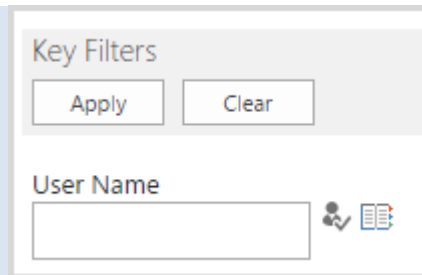
**NOTE:** On newly created sites, Metadata Navigation and Filtering feature is activated by default, which allows creating a large number of users’ registrations and avoid threshold limit excess error (when there are more users then set for List View Threshold) on Registrations list after registrations have been created.

On newly created sites, there is only one flat view with the combination of search-box and filters:

<ul style="list-style-type: none"> <li>Courses Views</li> <li>Curriculum</li> <li>Courses</li> <li>Course Offerings</li>   <li>Users Tools</li> <li>All Users</li>   <li style="border: 2px solid red; padding: 2px;">Registration Views</li> <li>All Registrations</li>   <li>Reports</li> <li>Course Report</li> <li>Curriculum Report</li> <li>Project Team Report</li> <li>User Report</li> </ul>	<ul style="list-style-type: none"> <li>Common Tools</li> <li>Enrollment Templates</li> <li>Certificate Templates</li> <li>All Certificates</li> <li>External Certificates</li> <li>Generate Name Cards</li> <li>Invoice Templates</li> <li>Text Templates</li> <li>Email Templates</li> <li>Course Interests</li> <li>Coupons</li> <li>Rooms</li> <li>Locations</li> <li>Course Categories</li> <li>Credits for Payment</li> <li>Editable Teacher Columns</li>   <li>SCORM</li> <li>All Content Packages</li>   <li>Line Management Tools</li> <li>Enrollment Requests</li> <li>Enrollment Requests Tasks</li> </ul>
---	--

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





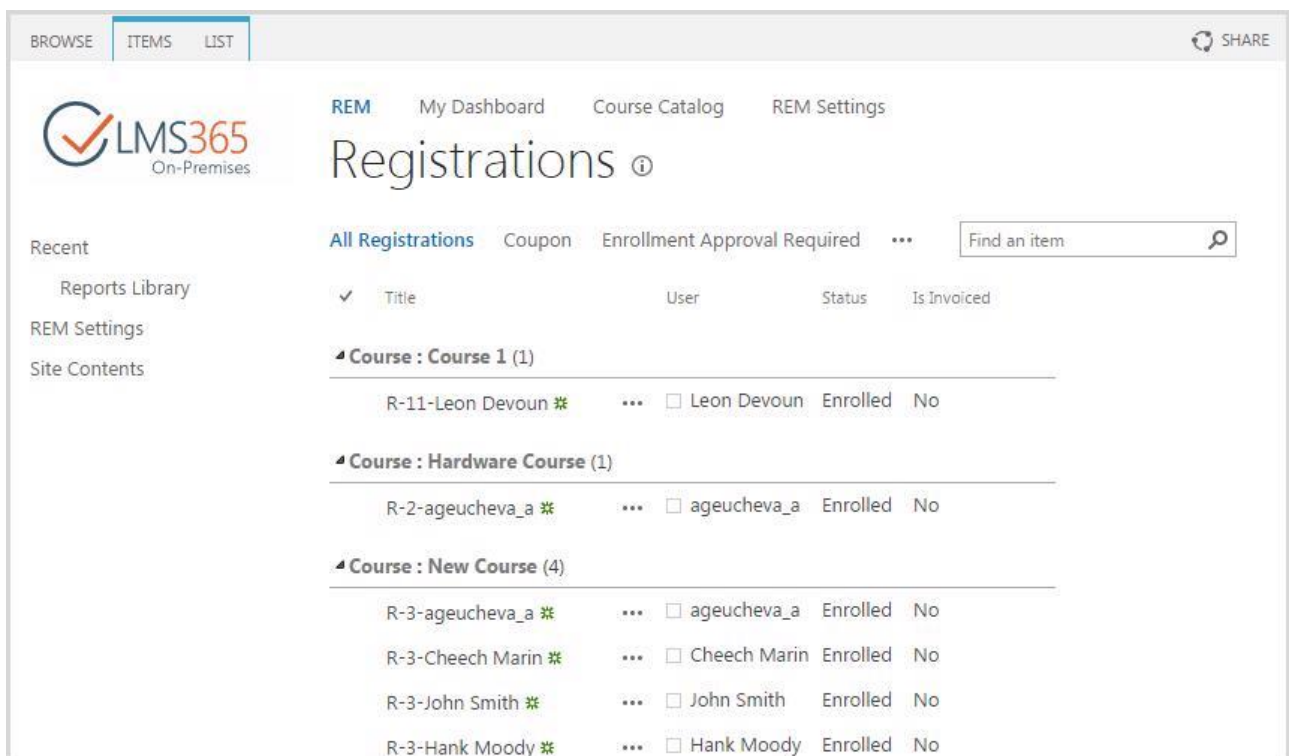
More filters can be added in the List Settings > Metadata navigation settings > Configure Key Filters. Do not forget to check whether new Key Filters have been added to the Indexed Columns. If not, you should index new Key Filters manually. To do this, go to List Settings > Indexed columns > Create a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

If you want to use **grouping** on this list, for better performance we recommend using it with deactivated Metadata Navigation and Filtering feature.

All views can be printed.

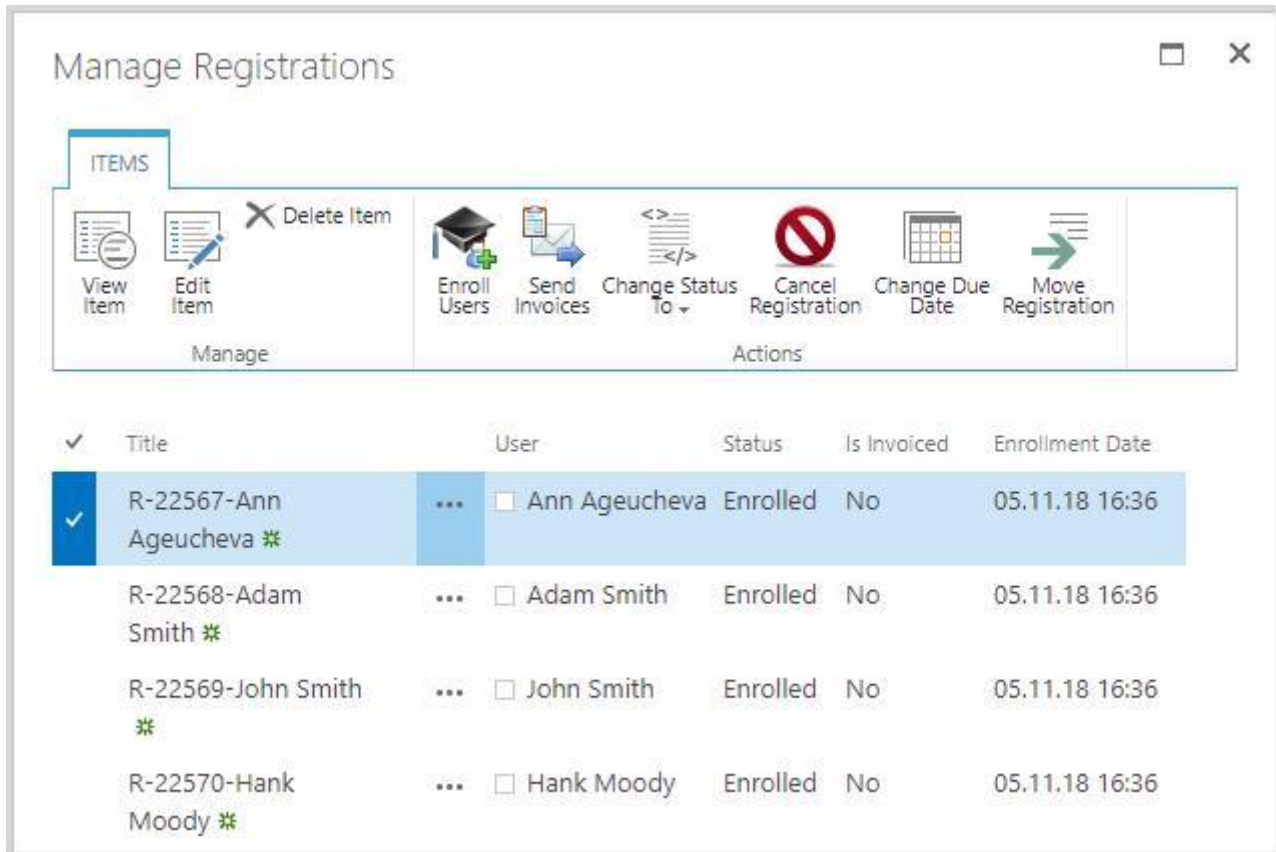
#### 4.1.16.1 Viewing Registrations

To view registrations, select corresponding Registration view on the REM settings page. A list of registrations will be displayed:



✓	Title	User	Status	Is Invoiced
<b>Course : Course 1 (1)</b>				
	R-11-Leon Devoun ✱	Leon Devoun	Enrolled	No
<b>Course : Hardware Course (1)</b>				
	R-2-ageucheva_a ✱	ageucheva_a	Enrolled	No
<b>Course : New Course (4)</b>				
	R-3-ageucheva_a ✱	ageucheva_a	Enrolled	No
	R-3-Cheech Marin ✱	Cheech Marin	Enrolled	No
	R-3-John Smith ✱	John Smith	Enrolled	No
	R-3-Hank Moody ✱	Hank Moody	Enrolled	No

Or select a Course in the Courses list and click Manage Registrations in the ribbon menu. A list of registrations to the selected course will be displayed:



The screenshot shows the 'Manage Registrations' window with a ribbon menu and a table of registration records.

**Ribbon Menu:**

- ITEMS:** View Item, Edit Item, Delete Item
- Manage:** Enroll Users, Send Invoices
- Actions:** Change Status To, Cancel Registration, Change Due Date, Move Registration

**Table:**

✓	Title	User	Status	Is Invoiced	Enrollment Date
✓	R-22567-Ann Ageucheva ✱	... <input type="checkbox"/> Ann Ageucheva	Enrolled	No	05.11.18 16:36
	R-22568-Adam Smith ✱	... <input type="checkbox"/> Adam Smith	Enrolled	No	05.11.18 16:36
	R-22569-John Smith ✱	... <input type="checkbox"/> John Smith	Enrolled	No	05.11.18 16:36
	R-22570-Hank Moody ✱	... <input type="checkbox"/> Hank Moody	Enrolled	No	05.11.18 16:36

By default *Title*, *User*, *Status* and *Is Invoiced* field are displayed for each registration. It is possible to modify this view to select additional information fields to be displayed.

The Title contains Registration Key and Learner Name. Registration key is assigned during enrollment. The same registration key is assigned to several registrations if users were enrolled together or if "Add Registration with Existing Key" feature was used. It can be used for grouping invoices exported to .csv file.

#### 4.1.16.2 Editing Registrations


To edit the registration details, do the following:

1. Go to the necessary Registration View from the left menu;
2. Click the callout menu next to the required registration and select Edit Item:

## Registrations ⓘ

All Registrations    Coupon    Enrollment Approval Required    ...    Find a










✓	Title	User	Status	Is Invoiced
▲ Course : Course 1 (1)				
✓	R-11-Leon Devoun ✳	Leon Devoun	Enrolled	No
▲ Course : Hardware Course (1)				
	R-2-ageucheva_a ✳		Enrolled	No
▲ Course : New Course (4)				
	R-3-ageucheva_a ✳		Enrolled	No
	R-3-Cheech Marin ✳		Enrolled	No
	R-3-John Smith ✳		Enrolled	No

- Go to Course
- Edit Item 
- Delete Item
- Version History
- View Item
- Advanced ▶


3. In the open form, make necessary changes to the available fields:

Registrations - R-14-Learner 3

EDIT

 Save   
  Cancel   
  Paste   
  Cut   
  Copy   
  Approve Account   
  Attach File   
  Delete Item   
  ABC Spelling

Commit    Clipboard    Actions    Spelling

Content Type	Course Registration
Course Offering	Software Testing
Is Invoiced	Yes
Registration Payment Type	Paid
Registration Key	R-14
Coupon Code	
Price for	Member
Price	20
Discount	0 %
Status *	In Waiting List
City	Minsk
Street	Kozlova Lane
State	
Country	Belarus
Telephone	
ZIP code	
Email	a.koshkina@belitsoft.by
Notify when course is available	<input checked="" type="checkbox"/>
Company	BELITSOFT
Send Start Date Reminder	<input type="checkbox"/>
Set Registration Status to 'Course Not Completed' When Offering is Closed	<input checked="" type="checkbox"/>
Due Date	8/24/2017 

- *Status* – registration status. Select from *Wait for Approval/Enrolled/In Waiting List/ Course Not Completed/ Canceled*;

**NOTE:** If the course registration status is changed to Wait for Approval, the Send Invoice box will be inactive.

If the course registration status is changed to Enrolled, then the Send Invoice box will be active so the learner now can pay for the Course.

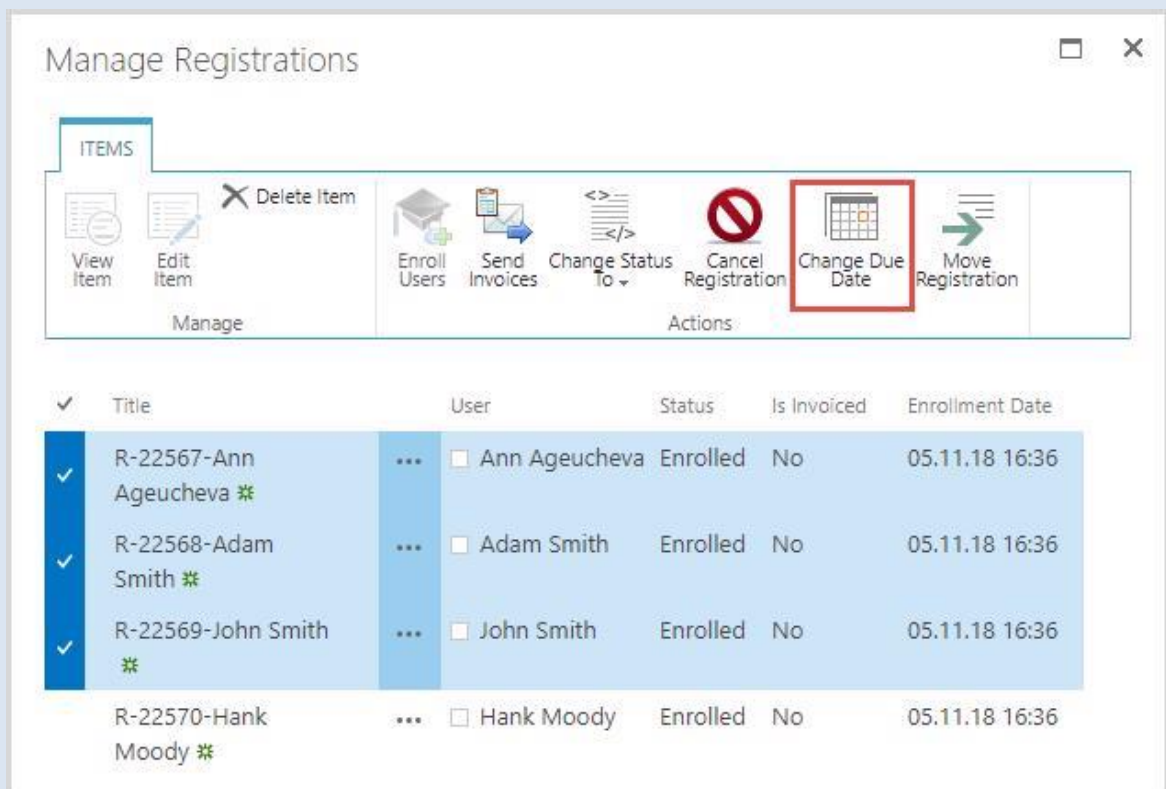
If the course registration status is changed to Course Not Completed, the Send Invoice box will be hidden;

If the course registration status is changed to Canceled, the Send Invoice box will be hidden.

If the course registration status is changed to In Waiting List, then the Waiting List is implemented by this status.

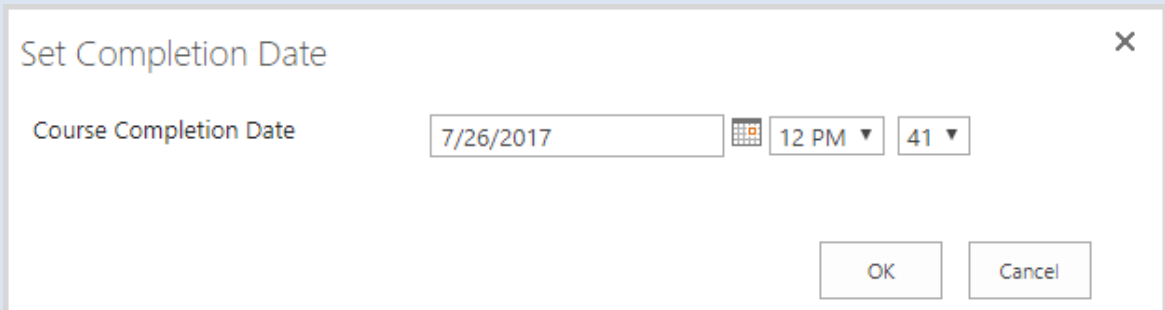
- *City, Street, State, Country, Telephone, ZIP code, Email, Company* – the fields for invoice address;
- *Send Start Reminder* – check the box to send a reminder to the enrolled learner in a specified number of days before the class begins (this number is being specified during the course template creation, by default it is 5 days);
- *Set Registration Status to 'Course Not Completed' When Course Offering is Closed* – check the box to change registration *Status* to 'Course Not Completed' after the Course Offering is closed;
- *Due Date* – you can change the due date if it was previously set. It is impossible to change the due date for registrations with 'Course Completed', 'Canceled', and 'Certificate Expired' statuses. The due date must be equal to or greater than current date.

**NOTE:** The due date can be as well changed via the Change Due Date action on the ribbon (you can select several registrations and set any date):



✓	Title	User	Status	Is Invoiced	Enrollment Date
✓	R-22567-Ann Ageucheva ✱	... <input type="checkbox"/> Ann Ageucheva	Enrolled	No	05.11.18 16:36
✓	R-22568-Adam Smith ✱	... <input type="checkbox"/> Adam Smith	Enrolled	No	05.11.18 16:36
✓	R-22569-John Smith ✱	... <input type="checkbox"/> John Smith	Enrolled	No	05.11.18 16:36
	R-22570-Hank Moody ✱	... <input type="checkbox"/> Hank Moody	Enrolled	No	05.11.18 16:36

**NOTE:** You can change registration status to 'Completed' (for Classroom and Webinar course types) using Change Status To ribbon action, and set Course Completion date (if Access End Date is specified for this Course Offering, it will be displayed in this field; if no – current date and time will be displayed):



If you want to change status of several registrations from different course offerings, current date and time will be displayed.

If you choose registrations not only to Classroom and Webinar course types, they will be skipped.

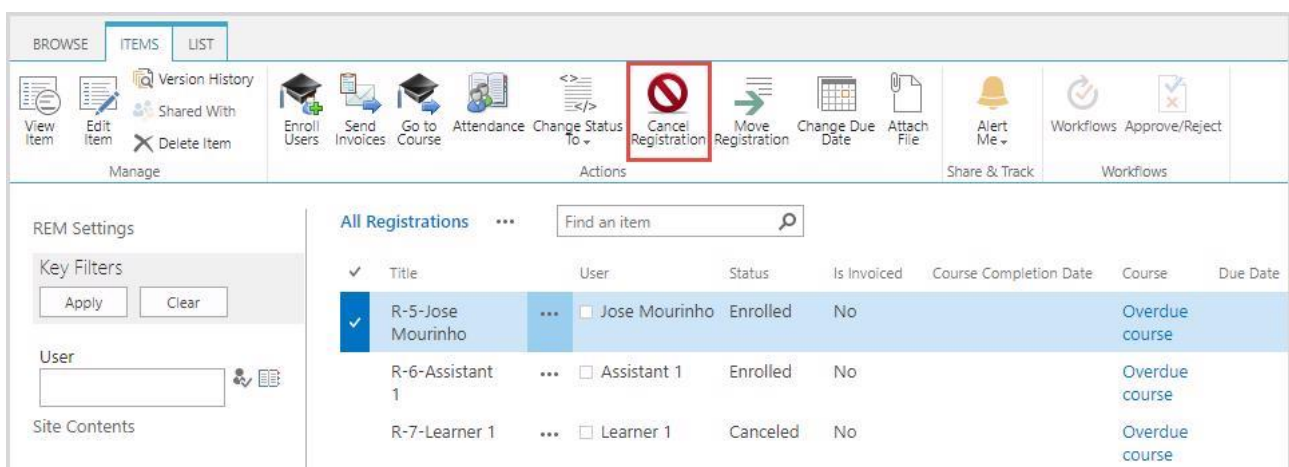
**NOTE:** Time value is available in the date picker if ELEARNINGFORCE – REM: Course Offering Access Period feature is activated.

4. Click Save to save the changes. You will be redirected to the Registrations List page.

### 4.1.16.3 Cancelling Registrations

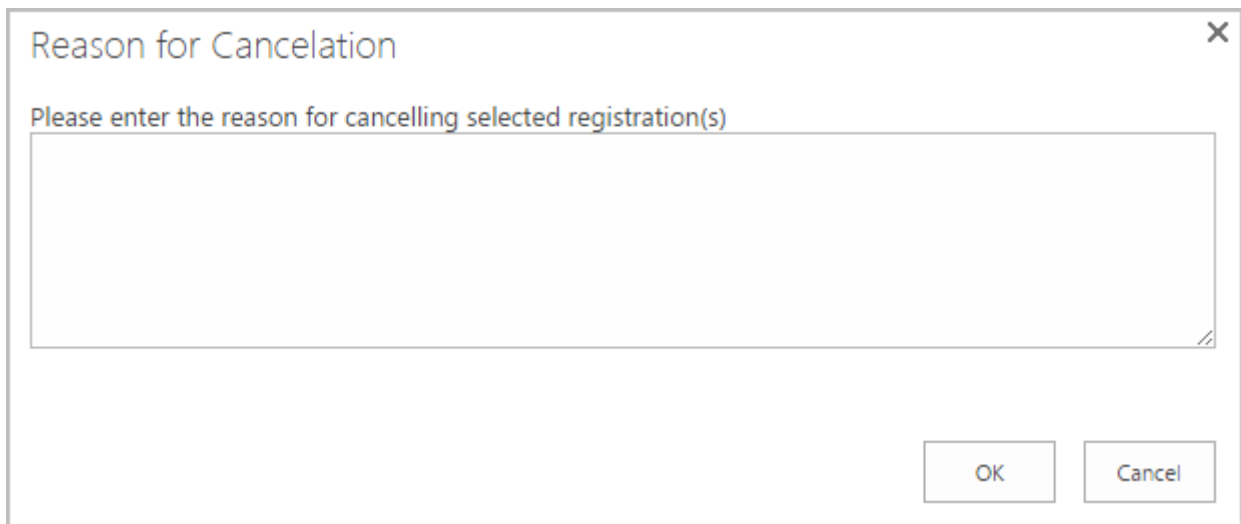
To cancel registration, do the following:

1. Go to the Registration View from the left menu;
2. Select the needed registration and click the Cancel Registration button in the ribbon menu:



✓	Title	User	Status	Is Invoiced	Course Completion Date	Course	Due Date
✓	R-5-Jose Mourinho	☐ Jose Mourinho	Enrolled	No		Overdue course	
	R-6-Assistant 1	☐ Assistant 1	Enrolled	No		Overdue course	
	R-7-Learner 1	☐ Learner 1	Canceled	No		Overdue course	

- Depending on settings, enter Reason for Cancellation (if required by enrollment template) or simply Confirm cancellation:



The registration gets Cancelled status with Cancellation reason *Canceled by Admin*. To view Reason for Cancellation, modify view in Registrations list and add corresponding column.

Four types of Cancellation reasons are possible in the system:

- *Canceled by Admin* - registration was canceled by Administrator;
- *Canceled by Learner* - registration was canceled by Learner;
- *Canceled By Course Offering* - related course offering was canceled;
- *User Removed From Group* - user was removed from group enrolled to course while his/her registration didn't have status Course Completed.

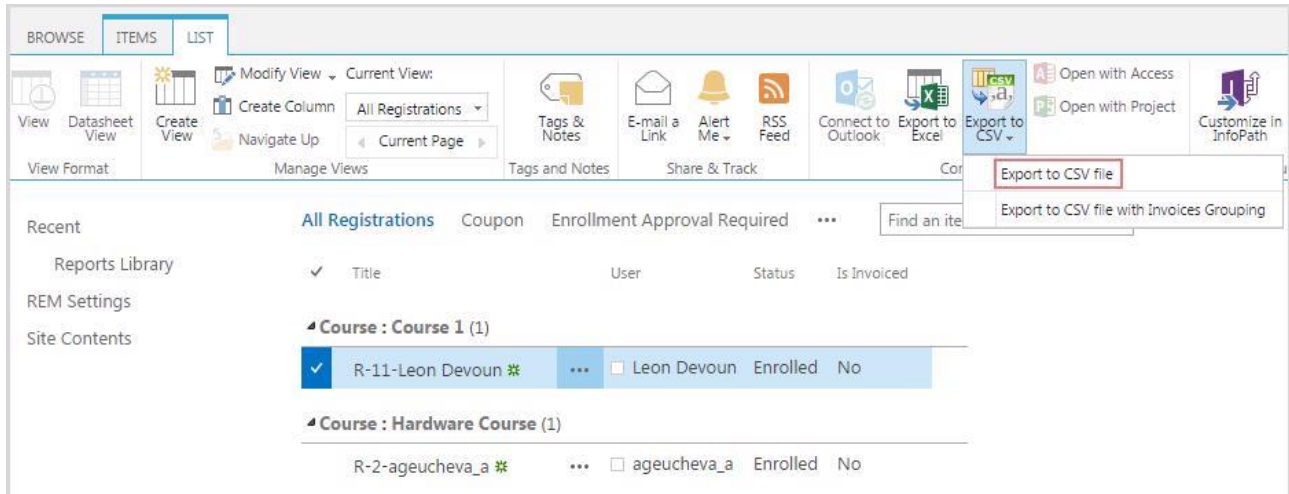
Comments added by user as Reason for Cancellation will be displayed will be displayed in the table next to Cancellation reason type.

#### 4.1.16.4 [Exporting a List to CSV-file](#)

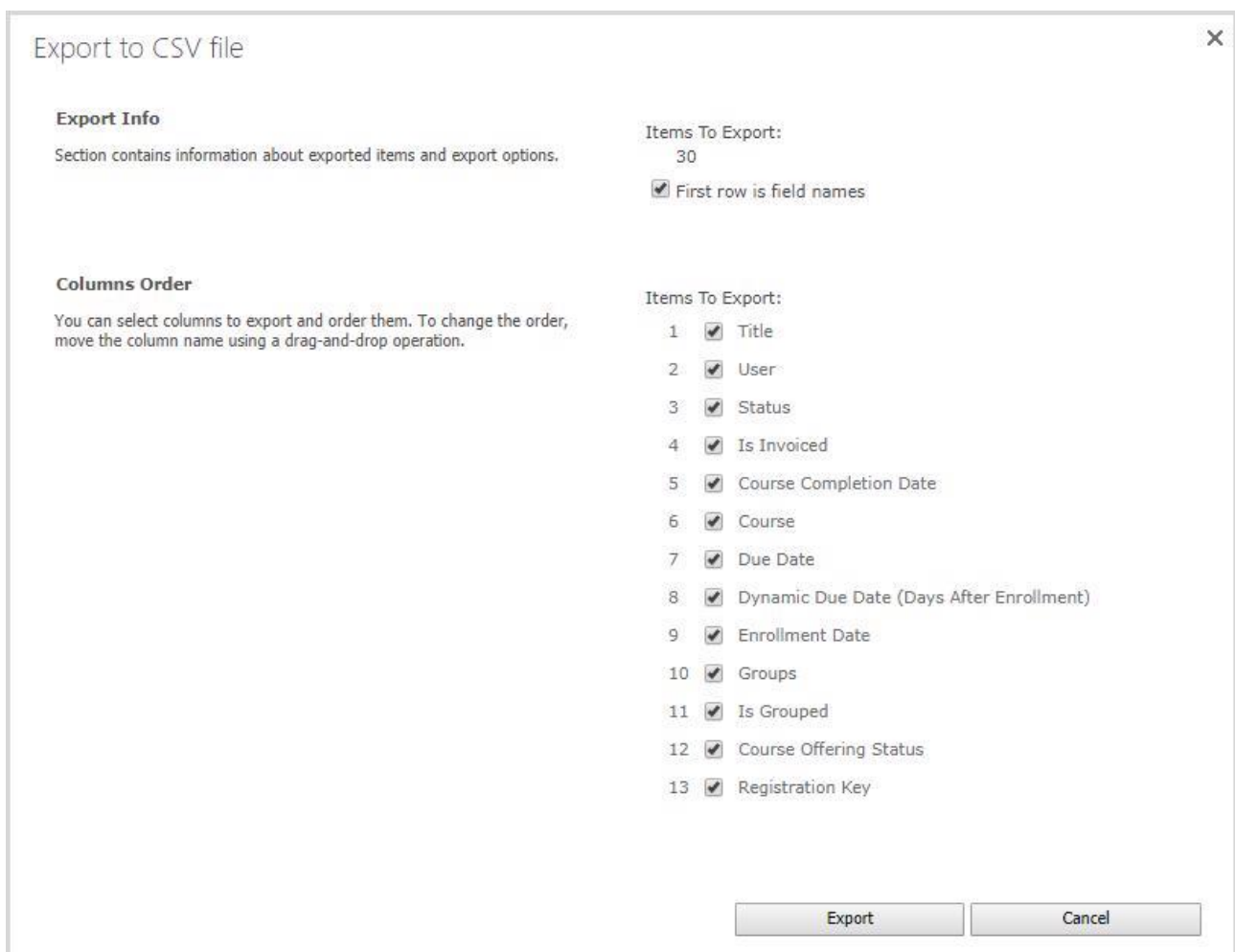
A user has an option to export a current registration list to a CSV-file.

To export the current registration list to the CSV-file, do the following:

- Go to the necessary Registration View from the left menu;
- On the ribbon menu go to List > Export to CSV > Export to CSV file from the list:



3. Check the necessary boxes for the values you want to be displayed in the CSV-file. You can change the checkboxes order using the drag-and-drop operation:



4. Click Export. The Browser's File Download dialog box will open;
5. Click Open to view the file OR Save to save it to your computer.



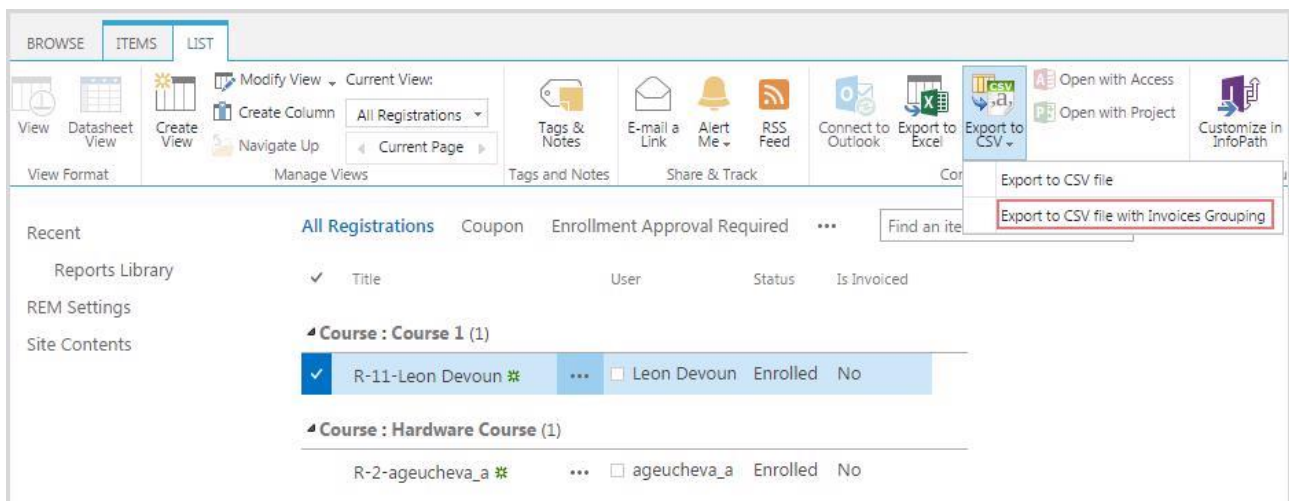
#### 4.1.16.5 Exporting a List to a CSV-file with Invoices Grouping

Exporting Group Invoices allows exporting invoices for multiple registrations and company registrations with the same registration key.

**NOTE:** Registrations have the same registration key if users were enrolled together by administrator or if "Add Registration with Existing Key" feature was used.

To export group invoices to a CSV-file, do the following:

1. Go to the necessary Registration View form;
2. On the ribbon menu go to the List > Export to CSV > ...file with Invoice Grouping:



3. Check the necessary boxes for the values you want to be displayed in the CSV-file:

Export to CSV file ✕

**Export Info**

Section contains information about exported items and export options.

**Columns Order**

You can select columns to export and order them. To change the order, move the column name using a drag-and-drop operation.

Items To Export:  
30

First row is field names

Items To Export:

- 1  Registration Key
- 2  User
- 3  Company
- 4  Subtotal
- 5  VAT
- 6  Total
- 7  Users Count

Export
Cancel

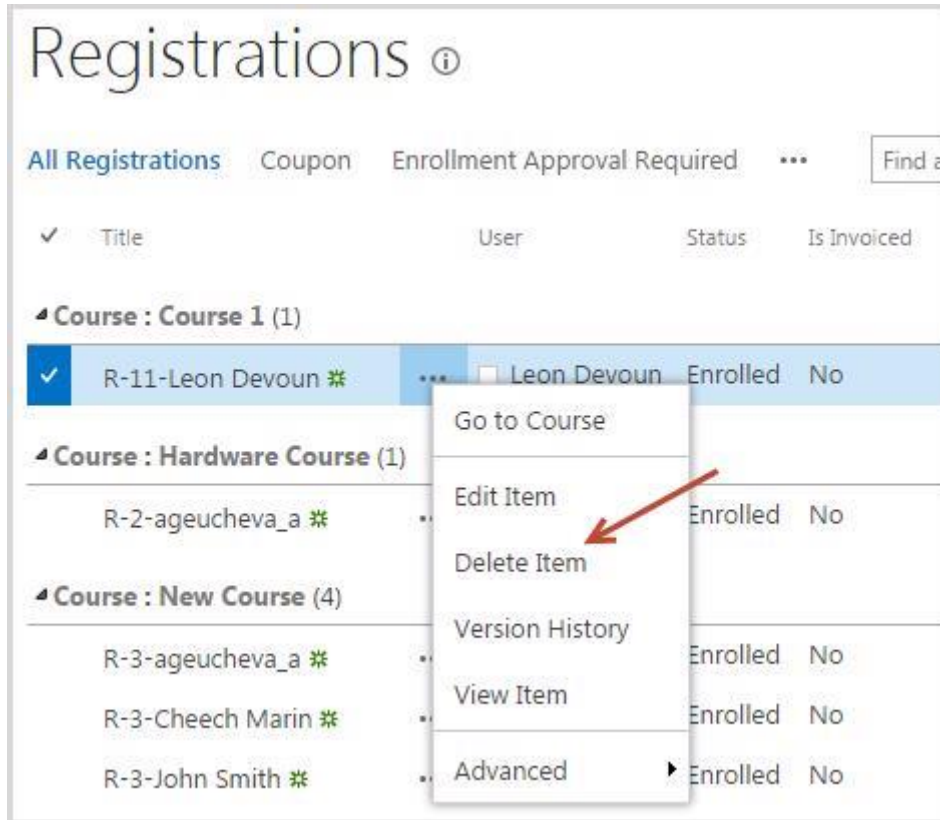
4. Click Export. The Browser's File Download dialog box will open;
5. Click Open to view the file OR Save to save it to your computer.

#### 4.1.16.6 *Deleting Registrations*

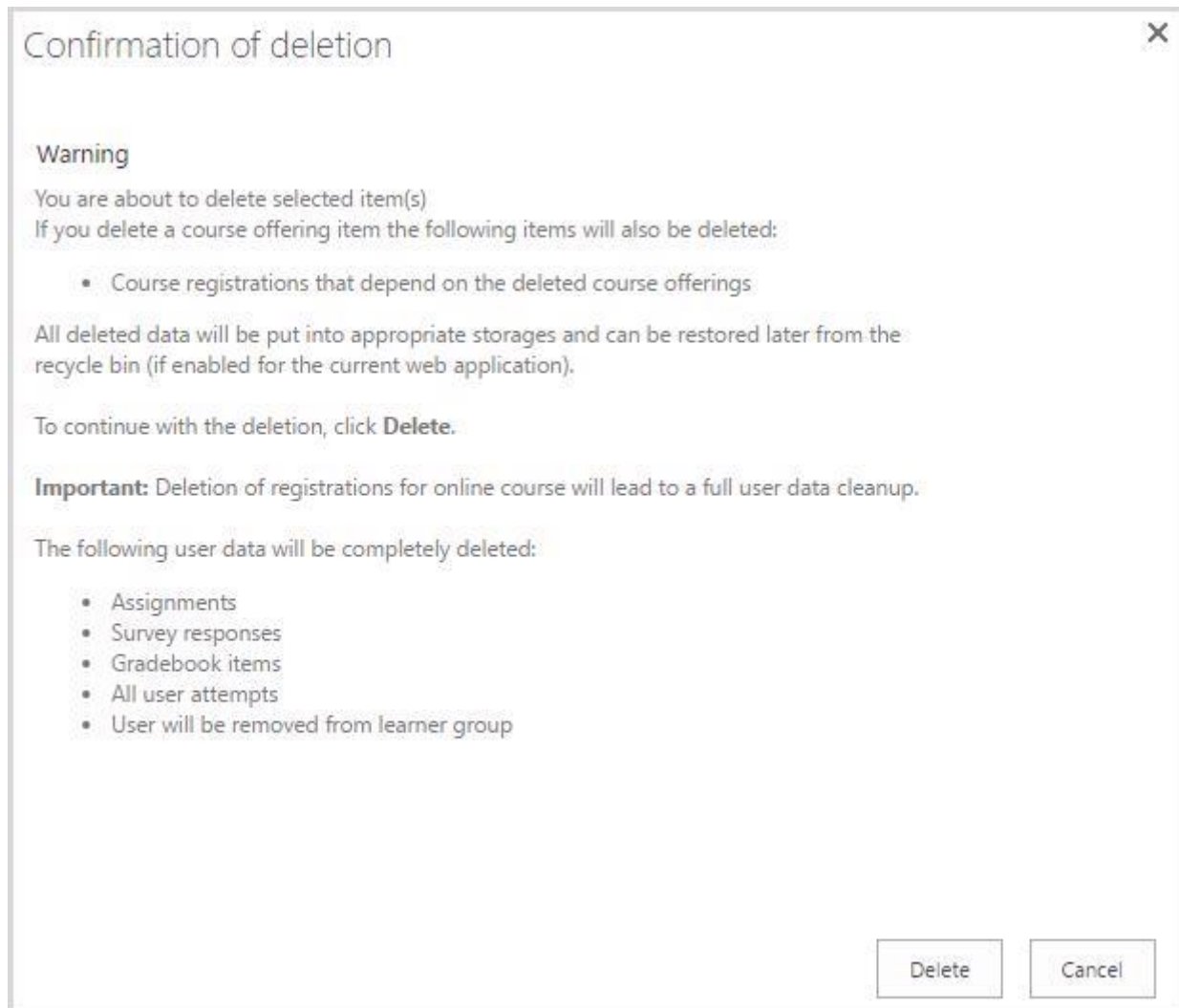
**NOTE:** If you only delete a registration, but not the user from REM, the user will still be able to access his account with the same permissions.

To delete a registration, do the following:

1. Go to the necessary Registration View from the left menu;
2. Click the callout menu next to the registration you want to delete and select Delete Item (or click Delete Item on the ribbon):



3. After that, you will see a confirmation message with the information about what will be deleted (along with user's certificates). Pay attention that if you delete registration for online courses, all user's related data will be deleted as well:



4. Click Delete button to confirm the deletion or Cancel button to discard the action.

**NOTE:** When using bulk deletion, Reporting Center records are updated only after synchronization (not by receivers).

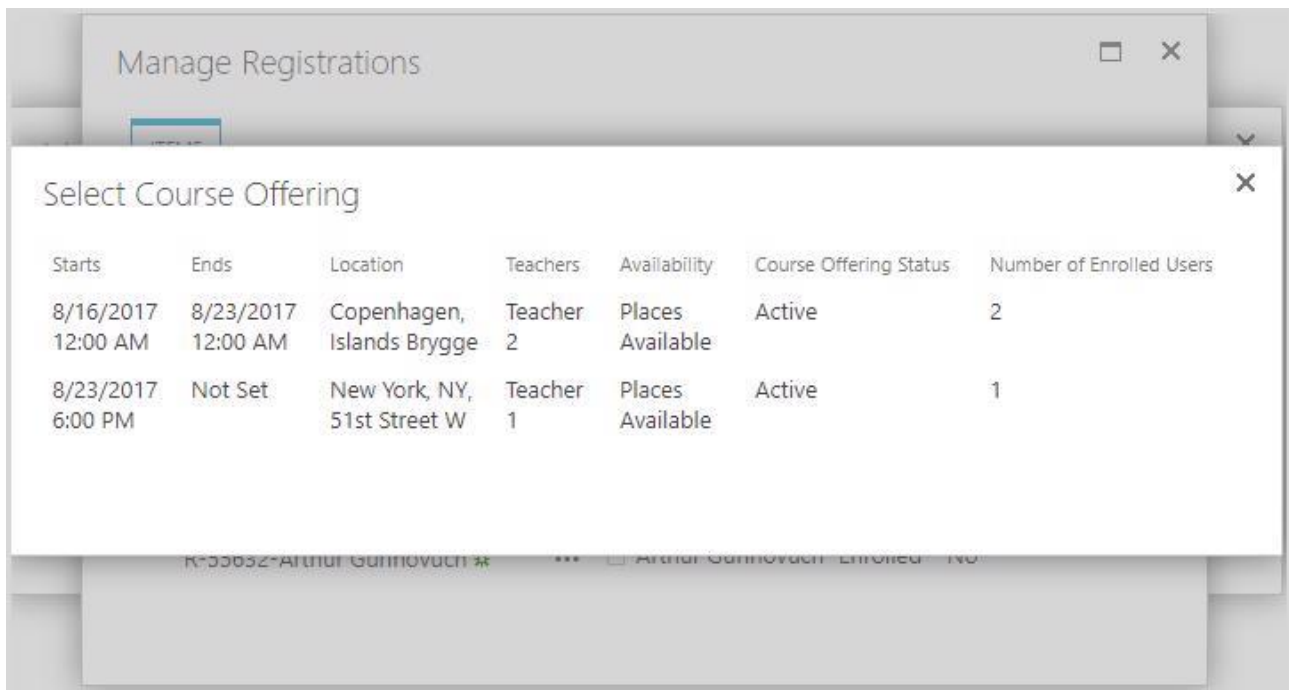
After deletion, the user's registration is sent to the Deleted Registrations storage. To view these registrations or permanently delete them click All Site Content > Deleted Registrations in the left menu.

#### 4.1.16.7 *Moving Registrations to Other Course Offerings*

Site collection administrator as well as LMS Administrator has the possibility to move learner's registration from one course offering to another within the same course.

To move registration to other course offering, go to the Registrations list or click Manage Registrations button on Courses/Course Offerings lists, select the needed registration (you can select several registrations of different learners but only within one course), and then click Move

Registration button. A list of all available course offerings to which you can move registration(s) will appear:



After you select the needed course offering, registration(s) will be moved to it. There is possibility to move only active registrations (registrations with 'Enrolled', 'Wait for Approval', 'Waiting for Start Date', and 'In Waiting List' statuses); registrations with 'Course Completed', 'Certificate Expired', 'Course Not Completed', and 'Canceled' statuses cannot be moved to other course offerings.

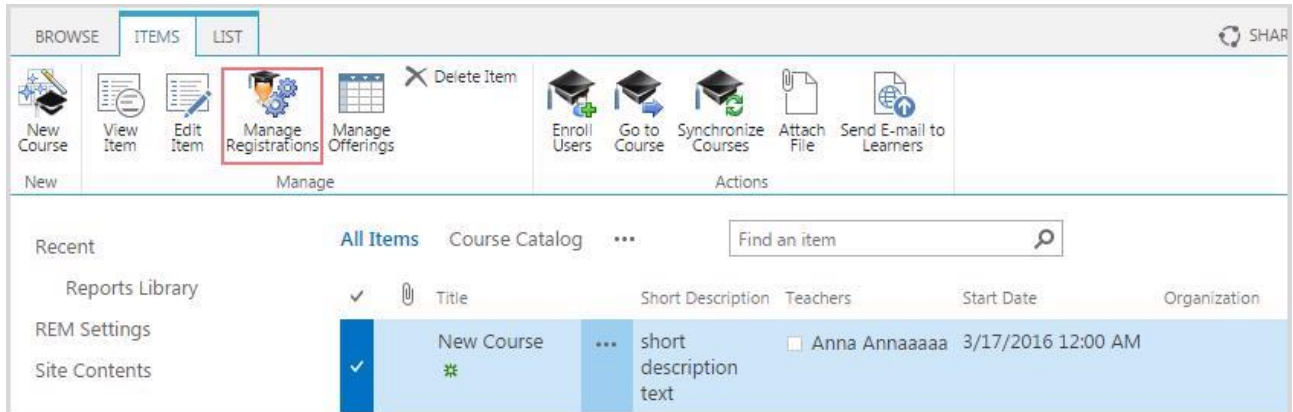
After registration has been moved, user(s) will receive a Course Update Notification.

**NOTE:** Please pay attention that user will get the update information that is only included in the course offering (e.g. Access Period, Teachers, Location, Room, Time Zone) but never about the information included in the Enrollment Template of the course offering (i.e. about the **Payment Type**). That means that if user has initially been enrolled in a course offering with free payment type and then his registration has been moved to a course offering with paid payment type, he will not receive any information about this (e.g. invoice). Users can receive information about the course offering from which their registrations were moved by adding specific placeholders to the email template. Please see more details in the [Email Templates Management](#) section.

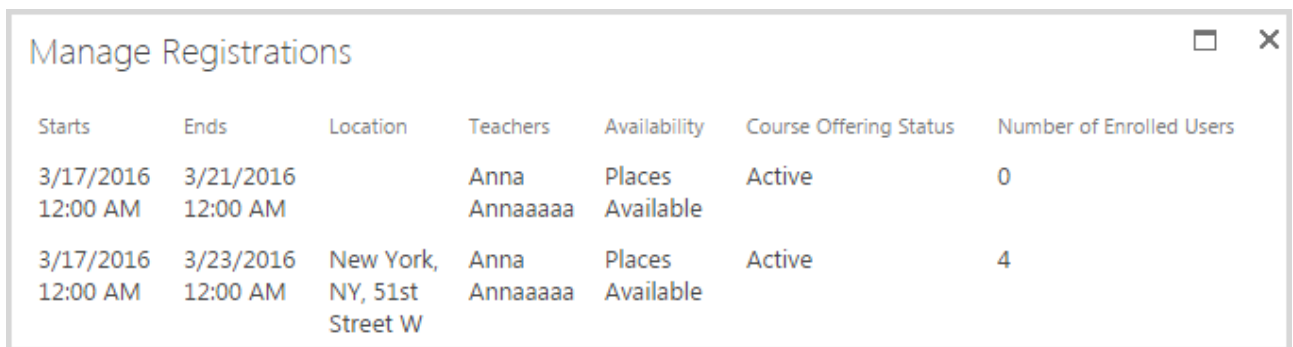
#### 4.1.16.8 Managing Registrations from Courses List

User can get access to Registrations management from the Courses section:

1. Select a Course and click 'Manage Registrations' in the ribbon menu:



2. If several Course Offerings are available for the Course, on the opened window click the Course Offering to manage registrations for:



3. A list of all Registrations to that Course Offering will open. User can manage these registrations using ribbon menu buttons:

### Manage Registrations

☐ ×

ITEMS

✕ Delete Item  
View Item Edit Item

Enroll Users Send Invoices Change Status To ▾ Cancel Registration Change Due Date Move Registration

	Title	User	Status	Is Invoiced	Enrollment Date
✓	R-22567-Ann Ageucheva ✱	... <input type="checkbox"/> Ann Ageucheva	Enrolled	No	05.11.18 16:36
	R-22568-Adam Smith ✱	... <input type="checkbox"/> Adam Smith	Enrolled	No	05.11.18 16:36
	R-22569-John Smith ✱	... <input type="checkbox"/> John Smith	Enrolled	No	05.11.18 16:36
	R-22570-Hank Moody ✱	... <input type="checkbox"/> Hank Moody	Enrolled	No	05.11.18 16:36

You can change registration status to 'Course Completed' (for Classroom and Webinar course types; LMS Administrator can change registration status to 'Course Completed' also for Material and e-Learning Content Package course types), and set Course Completion date (if Access End Date is specified for this Course Offering, it will be displayed in this field; if no – current date and time will be displayed):

### Manage Registrations

☐ ×

×

#### Set Completion Date

Course Completion Date

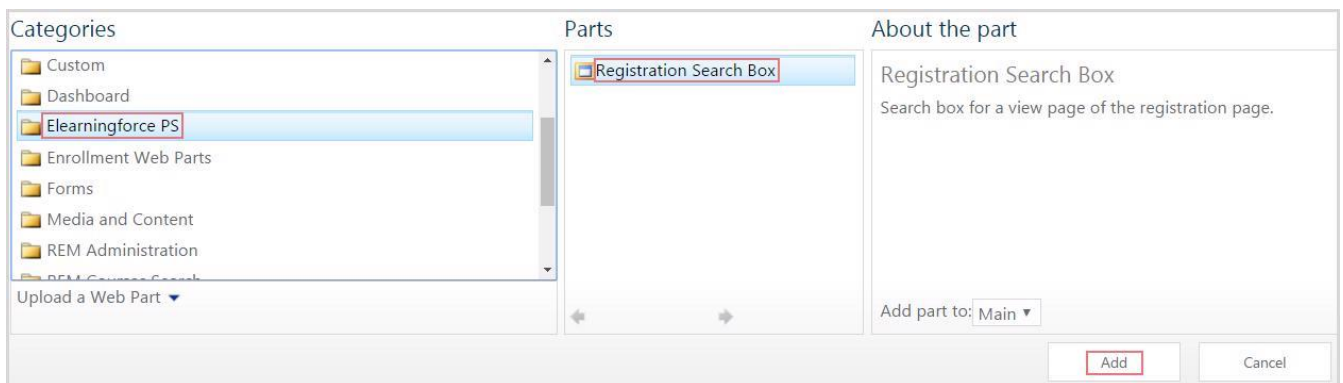
**NOTE:** Time value is available in the date picker if EARNINGFORCE – REM: Course Offering Access Period feature is activated.

#### 4.1.16.9 Registration Search Box Web Part

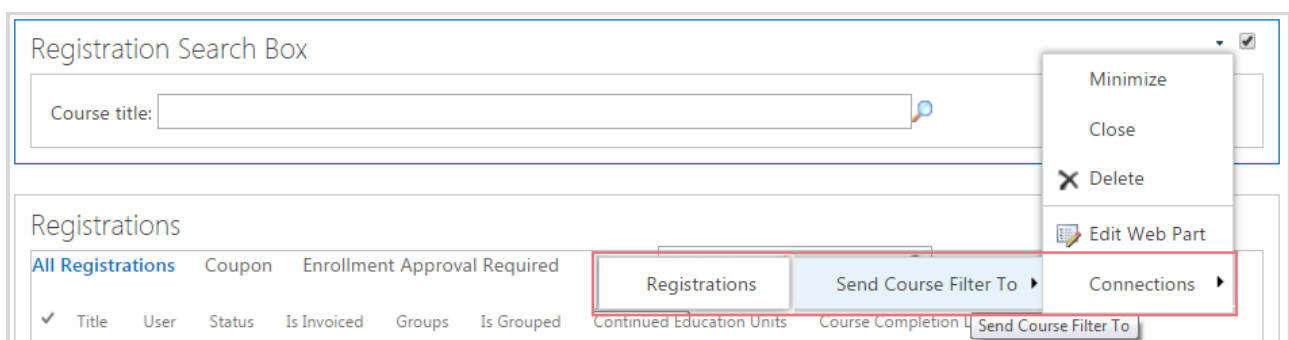
The purpose of the Registration Search Box Web Part is to make it fast and easy for administrators to administer enrollments in the REM. The web part filters the items in the Registrations list to a Course selected by the user.

To add this web part to Registrations list and use it, do the following:

1. Go to the Registrations list page, click Settings > Edit page;
2. Click Add a Web Part link, in the Earningforce PS category select Registration Search Box, and then click Add button:

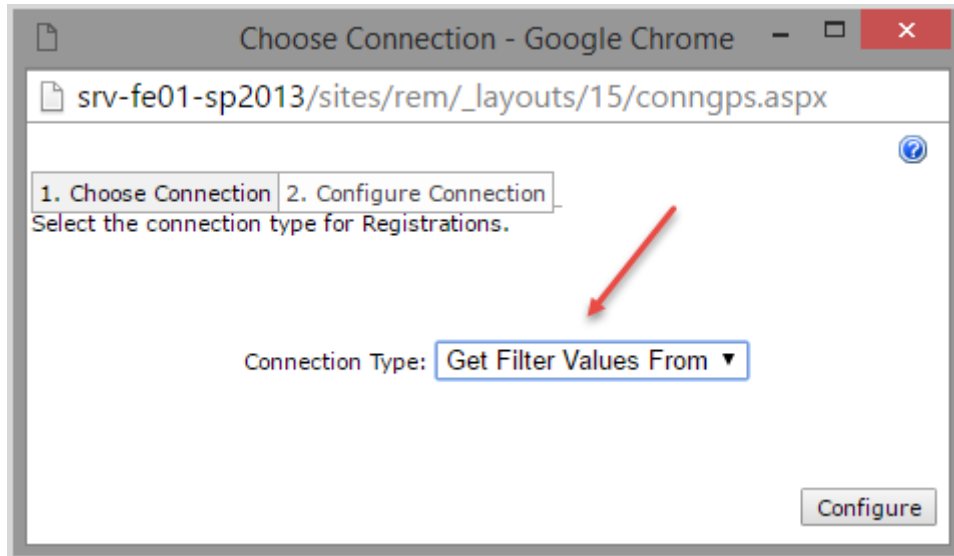


3. Connect the Registration Search Box Web Part. Click Connections > Send Course Filter To > Registrations:

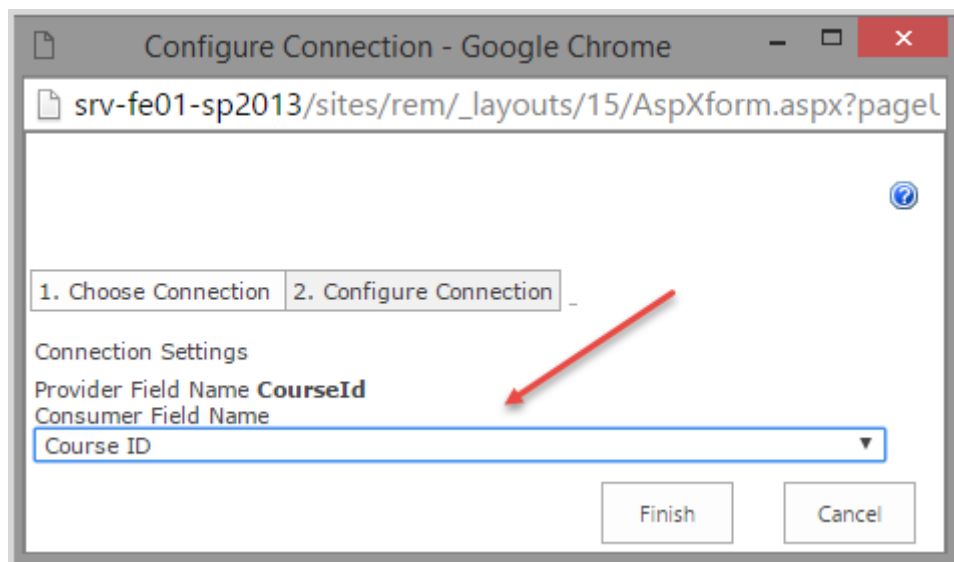


- a. Set Connection Type to 'Get Filter Values From' and click Configure button:

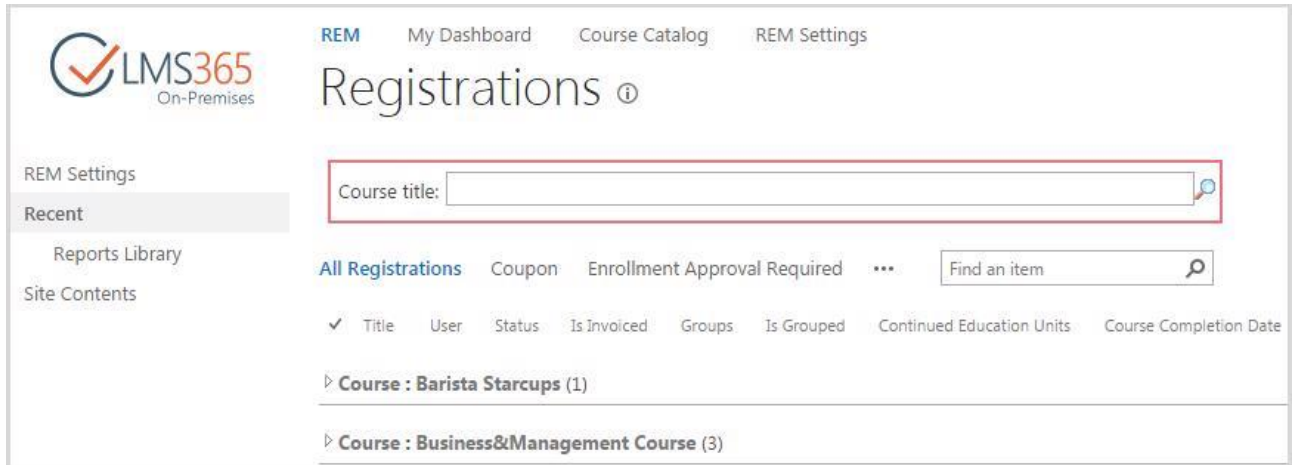




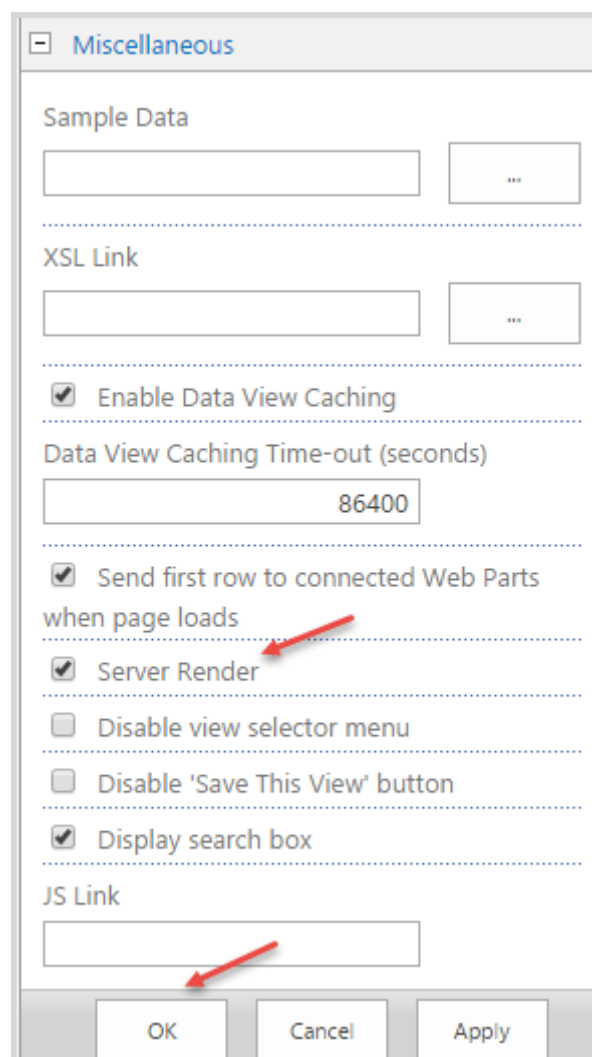
b. Set Consumer Filed Name to 'Course ID' and click Finish button:



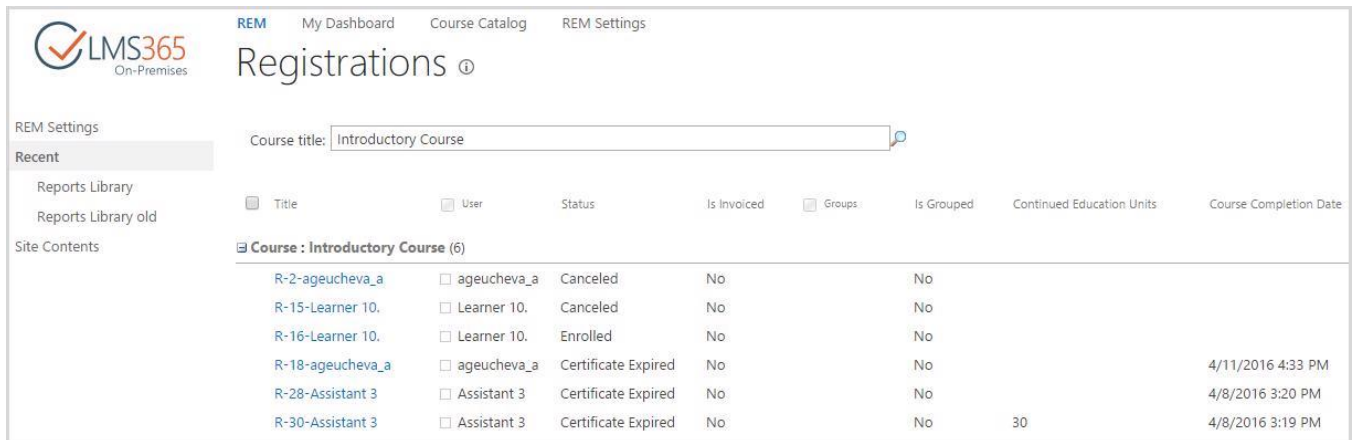
4. Click Stop Editing button to save the changes. Registration Search Box will now be added to Registrations list page:



5. Registration Search Box works correctly when server rendering is enabled. To enable server rendering, you must edit Registrations web part, in Miscellaneous section enable Server Render feature, and click OK button to apply the changes:



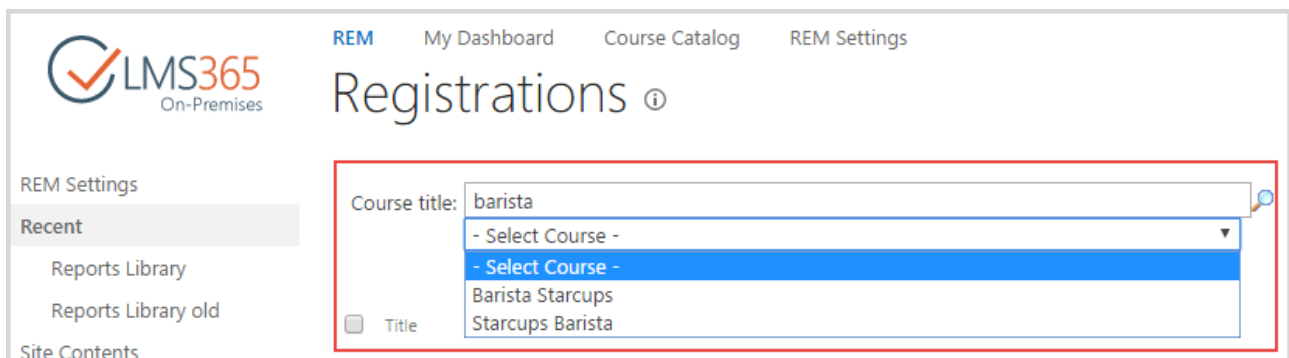
- Now you can enter the text you want to search in the Registration Search Box. Course with the matched text will appear. Click Expand button to see all registrations for this course:



The screenshot shows the LMS365 interface with the 'Registrations' page. The search box contains 'Introductory Course'. Below the search box, a table lists registrations for the selected course. The table has columns for Title, User, Status, Is Invoiced, Groups, Is Grouped, Continued Education Units, and Course Completion Date.

Title	User	Status	Is Invoiced	Groups	Is Grouped	Continued Education Units	Course Completion Date
<b>Course : Introductory Course (6)</b>							
R-2-ageucheveva_a	ageucheveva_a	Canceled	No		No		
R-15-Learner 10.	Learner 10.	Canceled	No		No		
R-16-Learner 10.	Learner 10.	Enrolled	No		No		
R-18-ageucheveva_a	ageucheveva_a	Certificate Expired	No		No		4/11/2016 4:33 PM
R-28-Assistant 3	Assistant 3	Certificate Expired	No		No		4/8/2016 3:20 PM
R-30-Assistant 3	Assistant 3	Certificate Expired	No		No	30	4/8/2016 3:19 PM

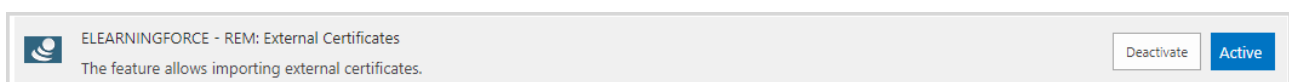
- If the text in the Registration Search Box matches several courses, then a drop-down list with the courses appears, and the user must select one of the courses from the drop-down:



The screenshot shows the LMS365 interface with the 'Registrations' page. The search box contains 'barista'. A dropdown menu is open, showing a list of courses: '- Select Course -', '- Select Course -', 'Barista Starcups', and 'Starcups Barista'. The dropdown is highlighted with a red box.

#### 4.1.17 Importing External Certificates

This feature allows user to upload external certificates. To activate the feature, go to Settings > Site Settings > Site collection features and activate the ELEARNINGFORCE – REM: External Certificates feature:



The screenshot shows a feature activation control for 'ELEARNINGFORCE - REM: External Certificates'. The feature is currently active, as indicated by the 'Active' button being highlighted in blue. The description below the feature name reads: 'The feature allows importing external certificates.'

After feature activation, system external course is created and appears in Course list. This course is used for importing external certificates:

Courses ⓘ

All Items Course Catalog ...

✓	📎	Title	Short Description	Teachers	Start Date	Organization	Course Category	Course Status	Has Available Offerings	Published
		System External Course ✳	... This course is used for importing external certificates.					Active	Yes	Yes

**NOTE:** It is impossible to create this course manually and enroll users into it as well as to delete it. System external course is not available in Course Catalog/Dashboard and it is impossible to add it to a curriculum.

An external course offering is also created after feature activation:

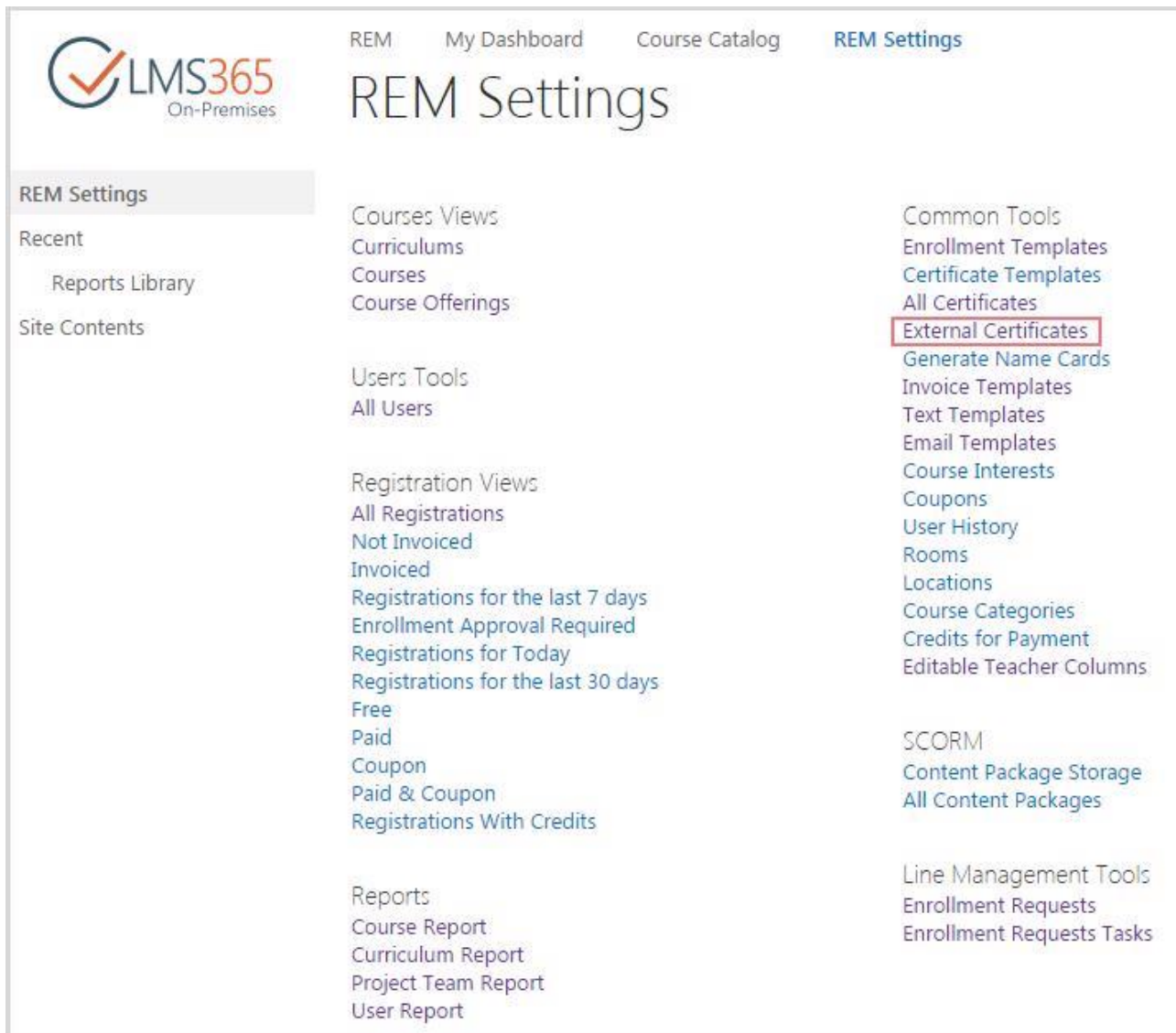
Course Offerings ⓘ

All Items Blended Course Offerings Canceled Course Offerings ...

✓	📎	Title	Access Period	Action	Course Offering Status
		Hardware Tutorial	7/19/2016 12:00 AM - 8/10/2016 12:00 AM	Enroll	Active
		System External Course	7/28/2016 3:23 PM - Not Set		Active

**NOTE:** It is impossible to create, cancel or delete this course offering as well as copy or clone it. It is possible to edit system external offering (fields available on Edit form: Enrollment Template, Access Period, and Time Zone).

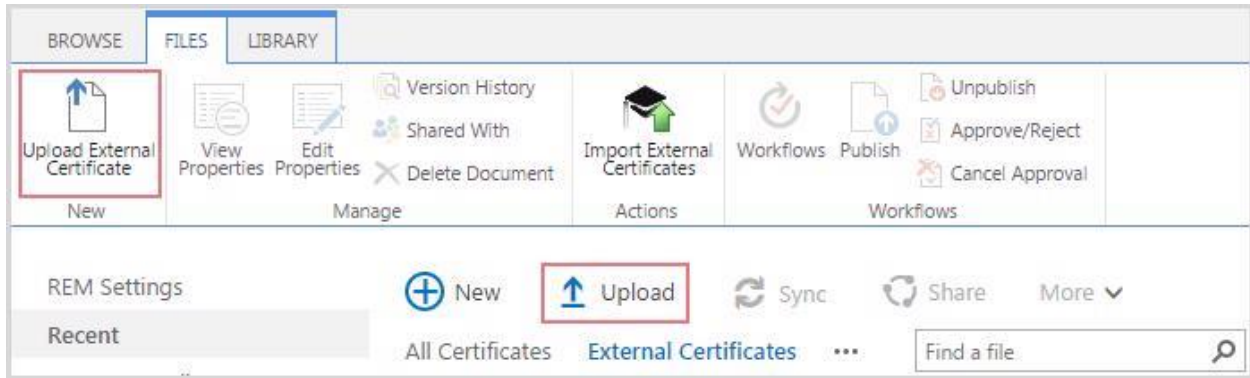
After feature activation, a new link will appear in Common Tools section of REM Settings:



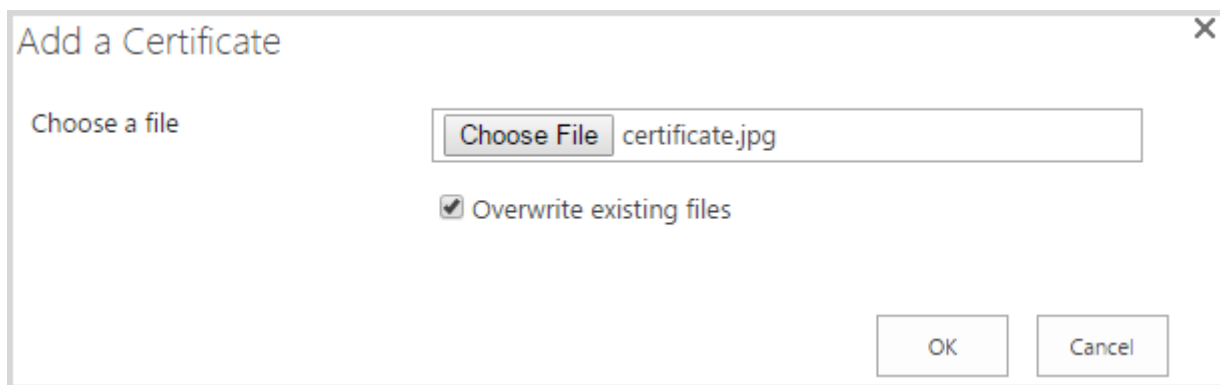
**NOTE:** 'All Certificates' link in REM Settings is available for LMS Administrator. For Line Manager/HR Responsible this link is available by direct URL.

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 (the fields marked with asterisk ( \* ) are required):



### Add a Certificate ✕


EDIT


  
 Check In  
Commit


  
 Cancel

  
 Paste

  
 Cut  
  
 Copy


  
 Delete Item


**Learner \***  

**Course \***  

**Course Title: \***

**Company**

**Issued Date**  

**Expiration Date**  

**Training Points**

**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

**Score**  %

Created at 10/21/2016 5:42 PM by  ageucheva\_a  
 Last modified at 10/21/2016 5:42 PM by  ageucheva\_a

- a. Learner – enter Learner’s name or use Browse button to select Learner who will receive a certificate (it is possible to select only one learner and impossible to select AD groups);

**NOTE:** In this field LMS Administrator can select all employees; Line Manager – only his subordinates; HR Responsible – only his subordinates.

- b. Course – select a course for which an external certificate will be issued (default value is System External Course);

- i. Course Title – enter course title that will be displayed in Dashboard (this field is not available if user selects an existing course);

**NOTE:** It is impossible to add an external certificate to Course Flows.


- c. Company – specify the name of company which issues the certificate;
- d. Issued Date – select date on which certificate is issued. Issued date is a course completion date;
- e. Expiration Date – select date on which certificate expires. Expiration date can be changed after saving the certificate;


**NOTE:** Issued Date must be less than Expiration Date and Expiration Date must be greater than Issued Date.


**NOTE:** To specify when an email reminder about certificate expiration will be sent to learner prior to expiration of certificate and recipients who will receive this reminder, edit system external course and click Save button to save the changes:


Courses - System External Course
✕


EDIT


  
Save  
Commit


  
Cancel

  
Paste  
Clipboard

  
Cut  
Clipboard

  
Copy


  
Delete Item  
Actions

  
Spelling  
Spelling

Course Title \*

Short Description 

This course is used for importing external certificates.

Course Certificate  


Certificate Template URL (Click here to test):

Email Notification Settings

Send email reminder  days before expiration.

Send email to:

User:  LMS Administrator:  Line Manager:

Other Users: 

Created at 4/14/2017 11:51 AM by  agecheva\_a  
Last modified at 4/14/2017 11:51 AM by  agecheva\_a

Save

Cancel



- f. Training Points – specify training points that are gained after course completion. The field is available only if REM: Training Points feature is activated;
- g. Competencies – select competencies which will be granted automatically to the learner who completed the course (revoked competency will be granted to a learner if an expired certificate is uploaded);

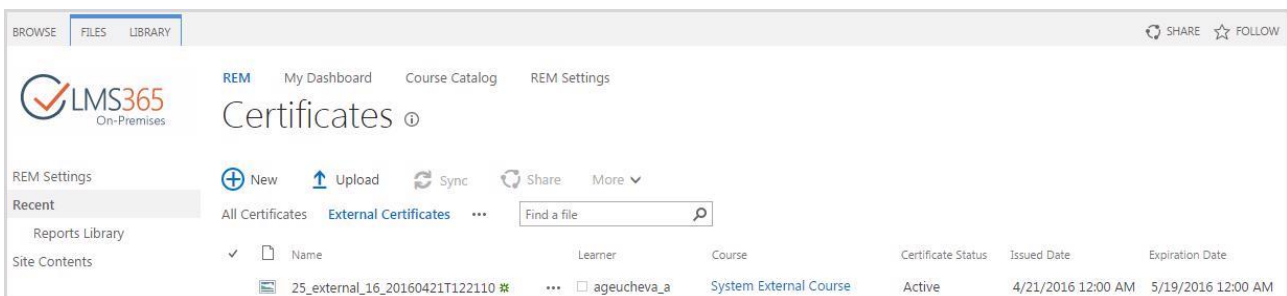
**NOTE:** It is possible to add competency(ies) to external certificates if ELEARNINGFORCE – REM: CCM Integration feature is activated.

- h. Automatic Revocation – check this option in order to automatically revoke Learner’s competencies granted by this certificate when certificate expires;

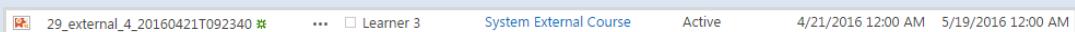
**NOTE:** This option is available only if ‘REM: Certificates Expiration’ feature is activated.

- i. Score – specify score gained for course completion (in percentage terms). Specified score will be displayed in My Training Overview and web reports, and will be counted in Key Performance Indicators as well.

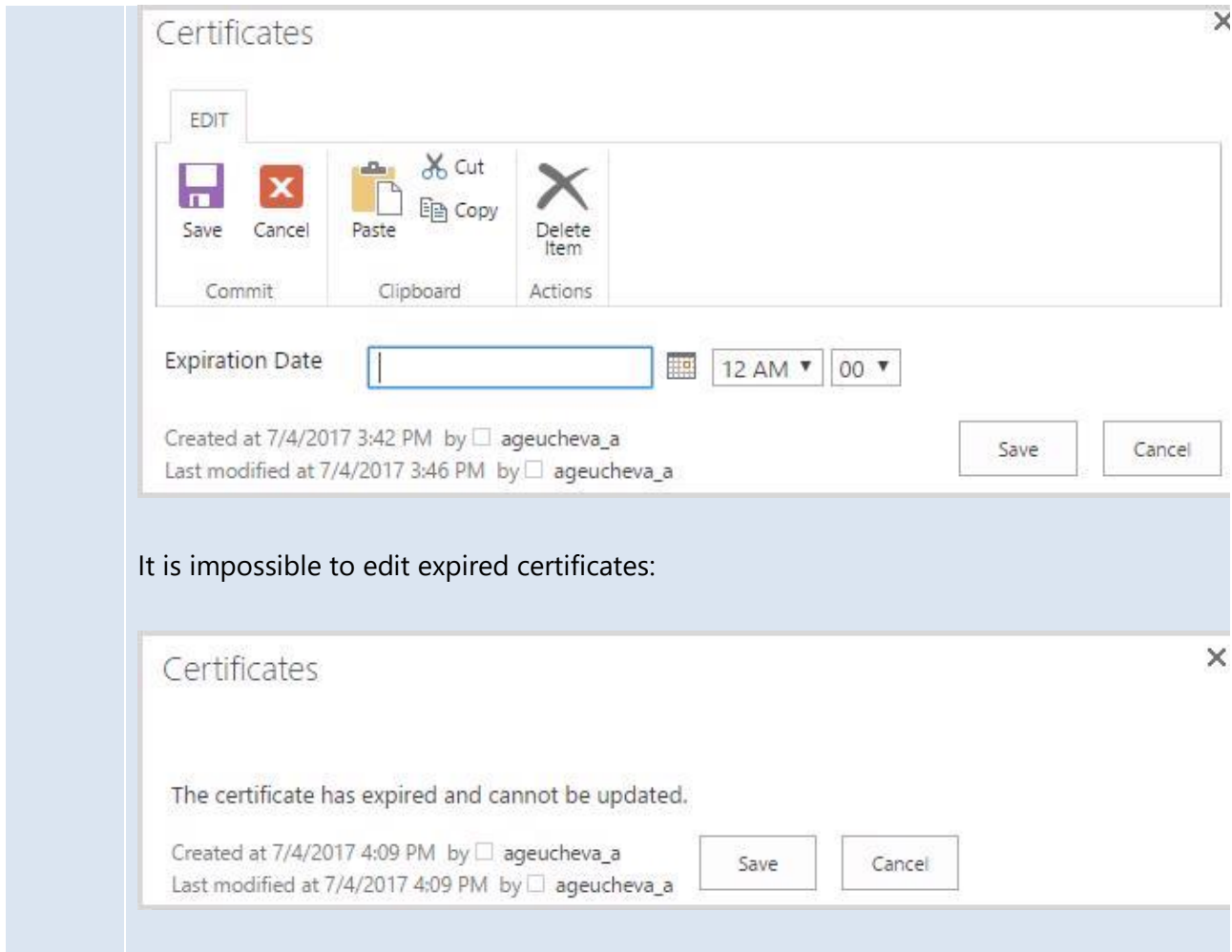
4. Click Check In button to upload the external certificate or Cancel button to discard the action. External certificate will now appear in the list of certificates:



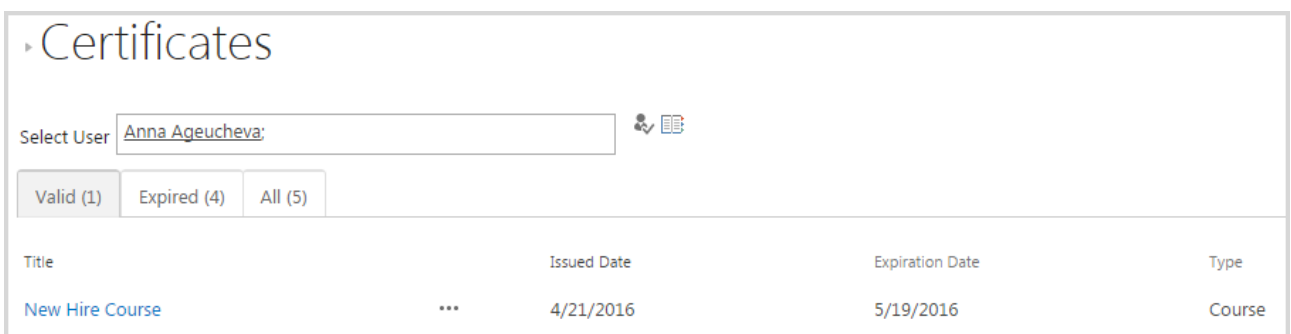
**NOTE:** After upload the certificate file name includes current date and time:



**NOTE:** Until you fill required fields and check in the file, it will not be shown in Dashboard or Reporting Center. If you Upload External Certificate button, choose a file to be uploaded, click OK button to upload it, and then click Cancel button, the file will be uploaded to the library and will be checked out to you. After that, it is possible to edit its properties. When a certificate is checked in, it is possible to edit only its Expiration Date field:



External certificates are displayed in Dashboard. Active certificates are displayed in 'Valid' tab; Expired certificates are displayed in 'Expired' tab. All active and expired certificates are displayed in 'All' tab (Issued and Expiration dates are taken from the certificate):



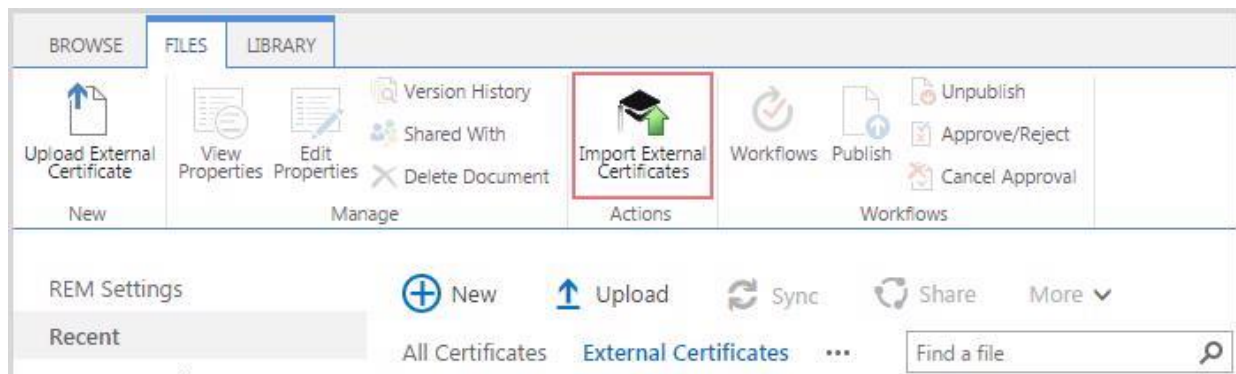
Training Points from external certificates are also displayed in Dashboard. Training Points Date Earned is the date when an external certificate was issued.

#### 4.1.17.1 Bulk upload of external certificates

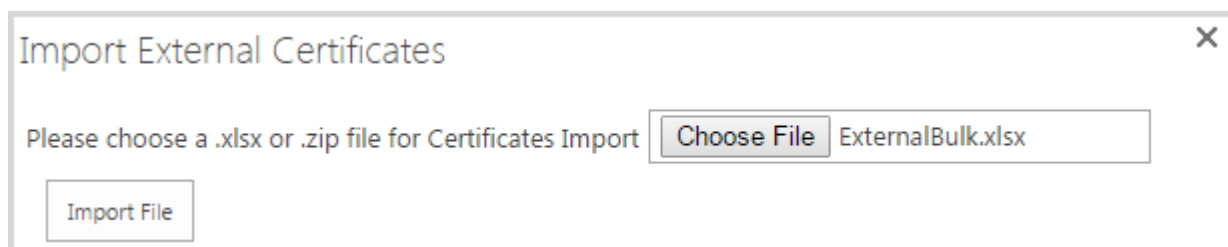
Use bulk upload feature if there is a need to upload more than a single certificate. You can upload up to 1000 certificates via user interface. To upload a bigger number check the PowerShell command for bulk upload described in REM Administration Guide.

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. You can add 'Score' column to the .xlsx file as well (it is not required);

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

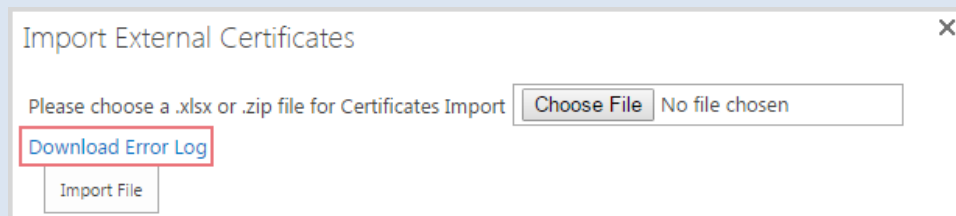
	A	B	C	D	E	F	G	H	I	J	K
1	User name	Course name	Issued date	Trair Company	Competency levels	Expiration date	Certificate image	Certificate template	Automatic revocation	Score	
2	example\red_2	ZIP	04.04.2016	150 BITS	c1-Poor	03.04.2017	image.jpg		no		

**NOTE:**

- .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).

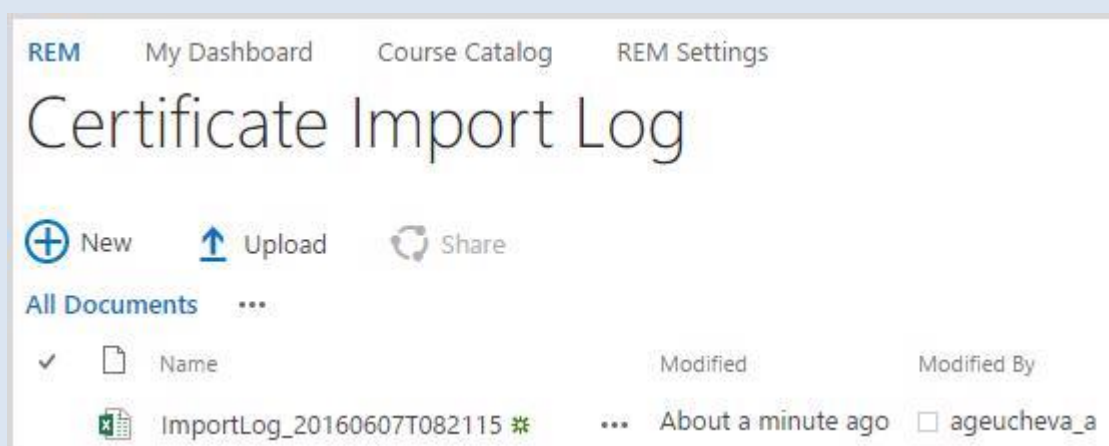
**NOTE:** Imported file is validated first and if there are any errors, you can download Error Log to see these errors:



They can be as follows:

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

**NOTE:** Downloaded Error Logs are stored as files in the hidden document library '~\Lists\CertificateImportLog':



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

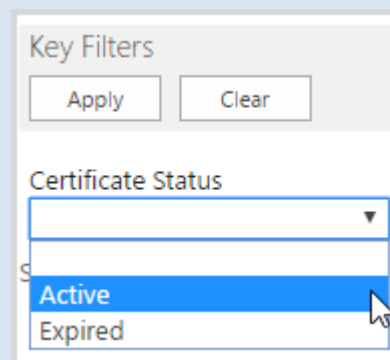
Certificates ⓘ

All Certificates External Certificates ...

Name	Learner	Course	Certificate Status	Issued Date	Expiration Date
30_external_4_20160426T120202	Learner 2	System External Course	Active	4/25/2016 12:00 AM	4/30/2016 12:00 AM
32_external_4_20160426T120206	Learner 1	System External Course	Active	4/25/2016 12:00 AM	4/30/2016 12:00 AM
28_external_4_20160426T120207	Assistant 3	System External Course	Active	4/22/2016 12:00 AM	4/30/2016 12:00 AM
29_external_4_20160426T120208	Learner 3	System External Course	Active	4/23/2016 12:00 AM	4/30/2016 12:00 AM

**NOTE:** On newly created sites, Metadata Navigation and Filtering feature is activated by default, which allows granting a large number of certificates to users and avoid threshold limit excess error (when there are more certificates granted then set for List View Threshold) on Certificates list.

You can use Certificate Status Key Filter on Certificates list to filter necessary information:



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

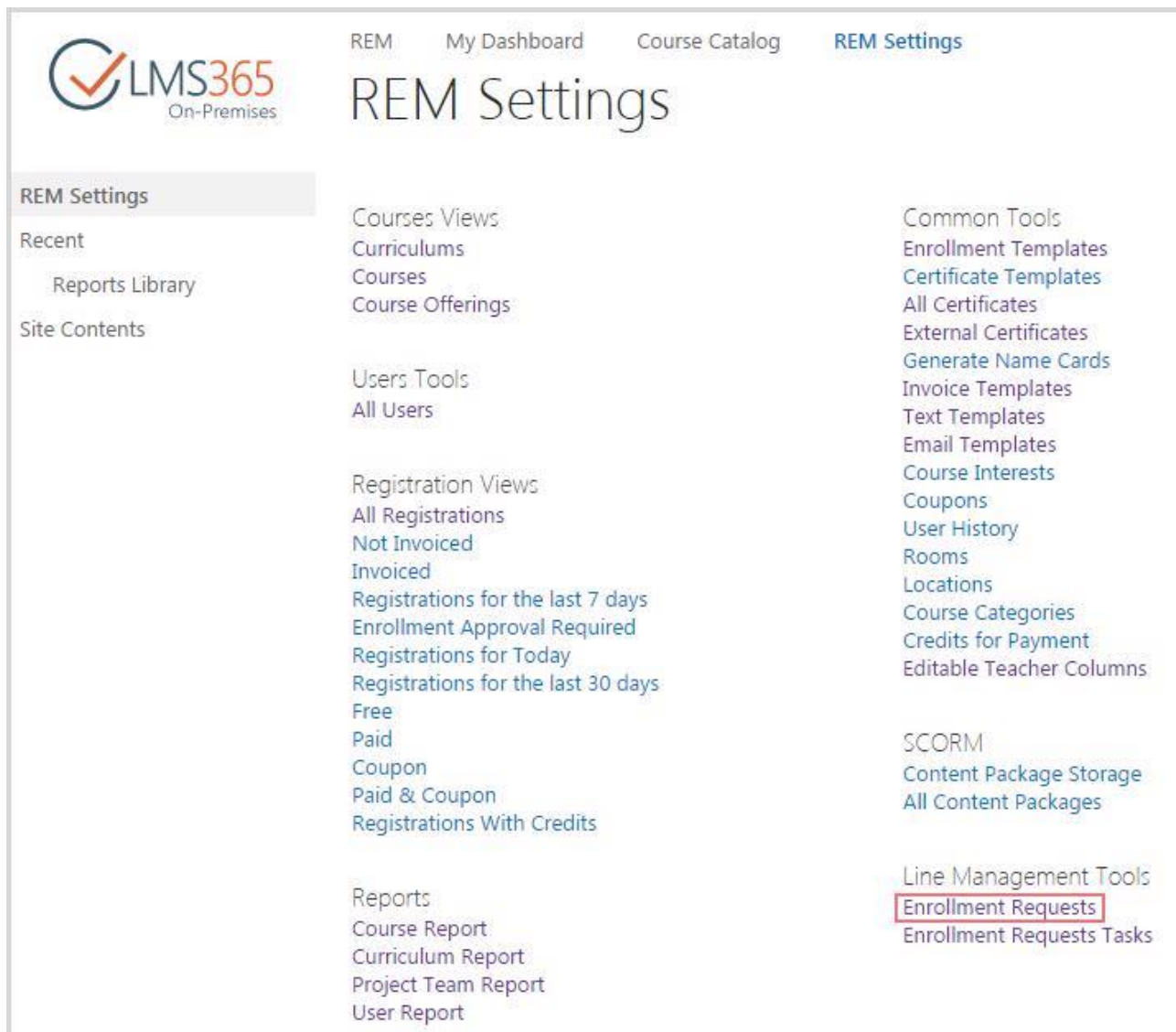
## 4.2 Line Manager Operations

Line management functionality allows line managers to approve/reject user enrollment requests before they're approved by the system or LMS administrators.

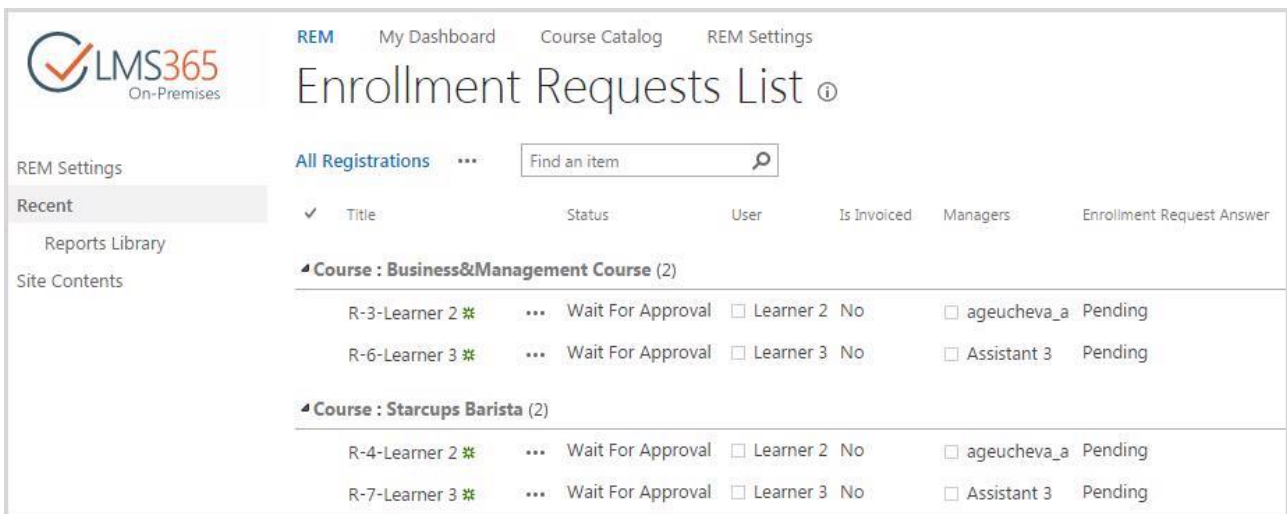
**NOTE:** Line Management feature uses 'Manager' property from CCM user profile. In order to sync that information from Active Directory to CCM profiles you need to configure user profile synchronization (check LMS Suite Installation and Configuration Guide to find out more about that).

## 4.2.1 Enrollment Requests

Enrollment requests are managed in the following list:



When user applies for enrollment in a course, this request appears in the Enrollment Requests list:



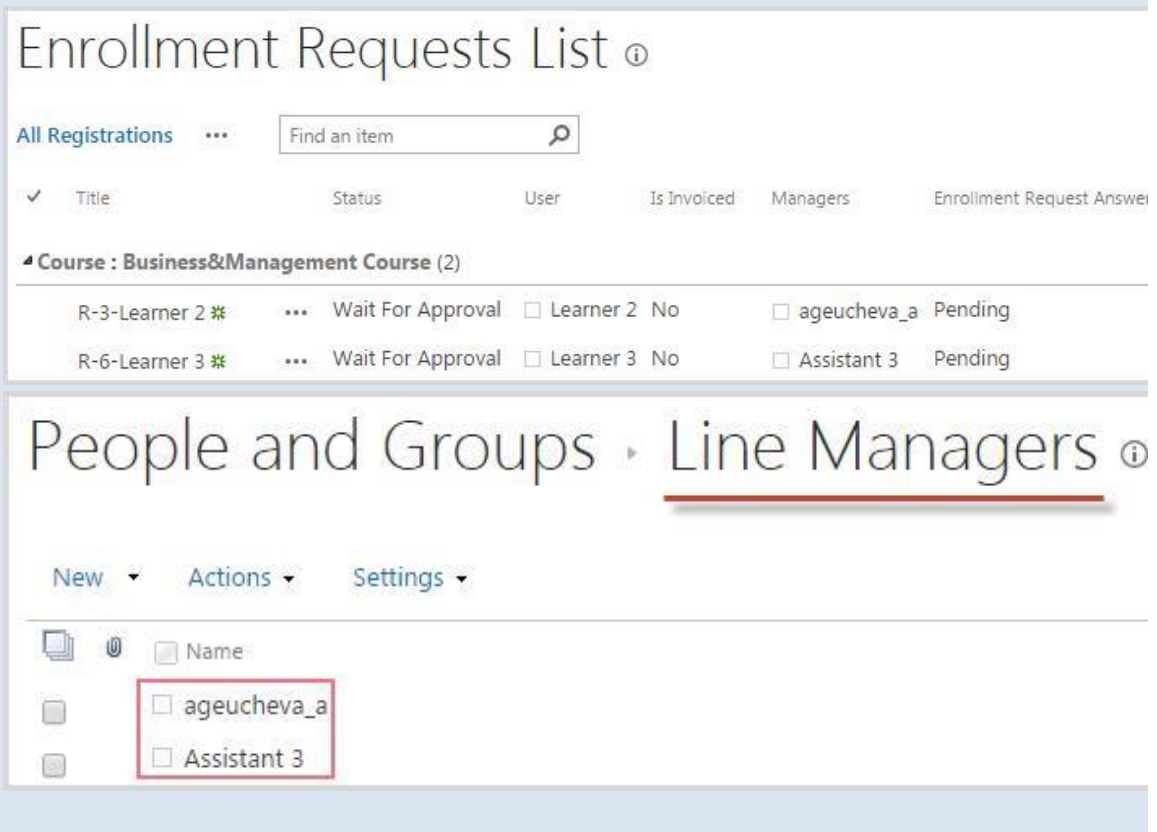
REM My Dashboard Course Catalog REM Settings

## Enrollment Requests List ⓘ

All Registrations ... Find an item 🔍

✓	Title	Status	User	Is Invoiced	Managers	Enrollment Request Answer
<b>Course : Business&amp;Management Course (2)</b>						
	R-3-Learner 2 🌿	...	Wait For Approval	<input type="checkbox"/> Learner 2 No	<input type="checkbox"/> ageucheva_a	Pending
	R-6-Learner 3 🌿	...	Wait For Approval	<input type="checkbox"/> Learner 3 No	<input type="checkbox"/> Assistant 3	Pending
<b>Course : Starcups Barista (2)</b>						
	R-4-Learner 2 🌿	...	Wait For Approval	<input type="checkbox"/> Learner 2 No	<input type="checkbox"/> ageucheva_a	Pending
	R-7-Learner 3 🌿	...	Wait For Approval	<input type="checkbox"/> Learner 3 No	<input type="checkbox"/> Assistant 3	Pending

**NOTE:** Information about Manager for the Enrollment request is taken from 'Manager' property of CCM user profile. When a request is created, user's manager is added to the SharePoint group "Line Managers":



## Enrollment Requests List ⓘ

All Registrations ... Find an item 🔍

✓	Title	Status	User	Is Invoiced	Managers	Enrollment Request Answer
<b>Course : Business&amp;Management Course (2)</b>						
	R-3-Learner 2 🌿	...	Wait For Approval	<input type="checkbox"/> Learner 2 No	<input type="checkbox"/> ageucheva_a	Pending
	R-6-Learner 3 🌿	...	Wait For Approval	<input type="checkbox"/> Learner 3 No	<input type="checkbox"/> Assistant 3	Pending

## People and Groups ▸ Line Managers ⓘ



New ▾ Actions ▾ Settings ▾

<input type="checkbox"/>	Name
<input type="checkbox"/>	ageucheva_a
<input type="checkbox"/>	Assistant 3

When you click the name of a specific request, you can view the completed enrollment template for the selected course:

## Enrollment Requests List - R-3-Learner 2 ✕

**VIEW**

<p> Edit Item</p> <p> Delete Item</p> <p style="text-align: center;">Manage</p>	<p> Version History</p> <p> Shared With</p>	<p> Reject Request</p> <p> Approve Request</p> <p style="text-align: center;">Actions</p>	<p> Alert Me</p> <p> Workflows</p>
---	---	---	--

Enrollment Request Answer	Pending
Status	Wait For Approval
City	
Street	
State	
Country	
Telephone	
ZIP code	
Email	mail@mail.vom
Notify when course is available	No
Company	
Send Start Date Reminder	No
Set Registration Status to 'Course Not Completed' When Offering is Closed	Yes

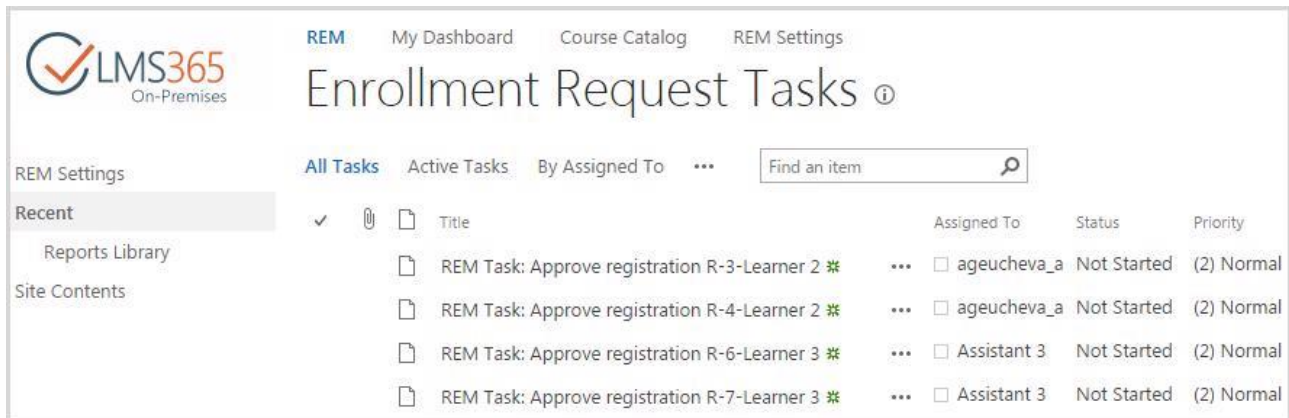
Content Type: Course Registration Request  
 Version: 1.0  
 Created at 4/18/2016 4:29 PM by  System Account  
 Last modified at 4/18/2016 4:29 PM by  System Account

Close



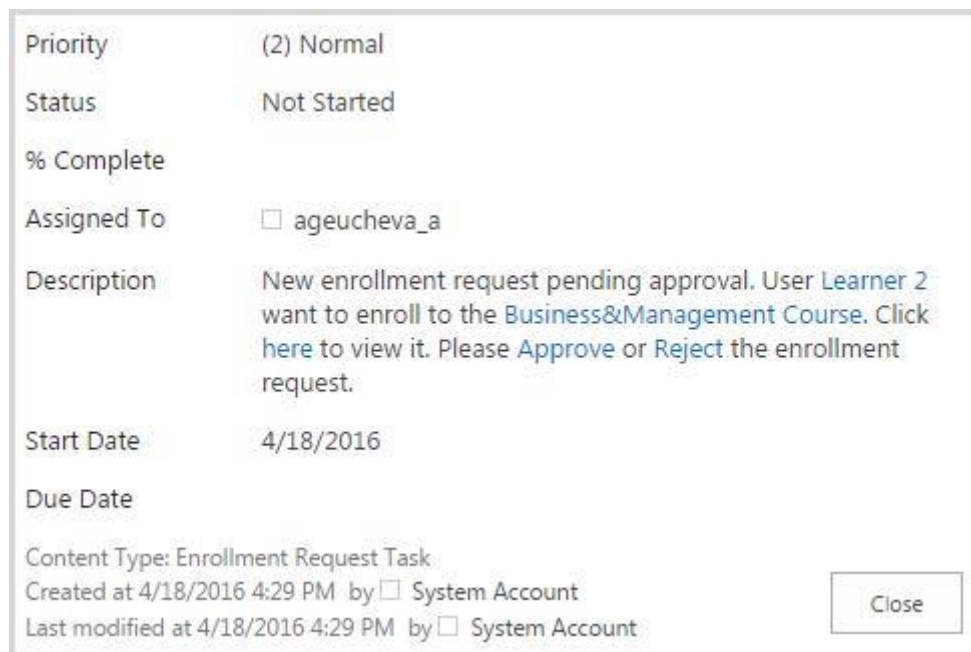
## 4.2.2 Enrollment Requests Tasks

After user sends the request, this user's line manager receives an enrollment request task. The request task will be shown in the Enrollment Requests Tasks section:



Title	Assigned To	Status	Priority
REM Task: Approve registration R-3-Learner 2	ageucheva_a	Not Started	(2) Normal
REM Task: Approve registration R-4-Learner 2	ageucheva_a	Not Started	(2) Normal
REM Task: Approve registration R-6-Learner 3	Assistant 3	Not Started	(2) Normal
REM Task: Approve registration R-7-Learner 3	Assistant 3	Not Started	(2) Normal

The task contains all the request information: Priority, Status, % Complete, Assigned To (the Line Manager profile), Description, Start and Due Date:



**Priority** (2) Normal  
**Status** Not Started  
**% Complete**  
**Assigned To**  ageucheva\_a  
**Description** New enrollment request pending approval. User Learner 2 want to enroll to the Business&Management Course. Click [here](#) to view it. Please Approve or Reject the enrollment request.  
**Start Date** 4/18/2016  
**Due Date**  
 Content Type: Enrollment Request Task  
 Created at 4/18/2016 4:29 PM by  System Account  
 Last modified at 4/18/2016 4:29 PM by  System Account

Enrollment Request tasks are assigned to user's line manager. Line managers can only approve/reject the requests from the users they manage (if they try to manage some other requests, they will get an error message). The tasks can be exported to the Outlook.


Enrollment request can be approved/rejected from the Enrollment Requests Tasks section or from e-mail notification (if it is configured as described in the [Enrollment Templates](#) section):


To approve/reject the enrollment request from the Enrollment Requests Tasks section, do the following:


1. Go to the Enrollment Requests section:
2. Click name of the needed request;
3. In the open form with the request information click either Reject Request or Approve Request:


Enrollment Requests List - R-3-Learner 2
✕


VIEW


 Edit Item


 Delete Item


 Version History

 Shared With

 Reject Request

 Approve Request

 Alert Me


 Workflows

Enrollment Request Answer	Pending
Status	Wait For Approval
City	
Street	
State	
Country	
Telephone	
ZIP code	
Email	mail@mail.vom
Notify when course is available	No
Company	
Send Start Date Reminder	No
Set Registration Status to 'Course Not Completed' When Offering is Closed Yes	

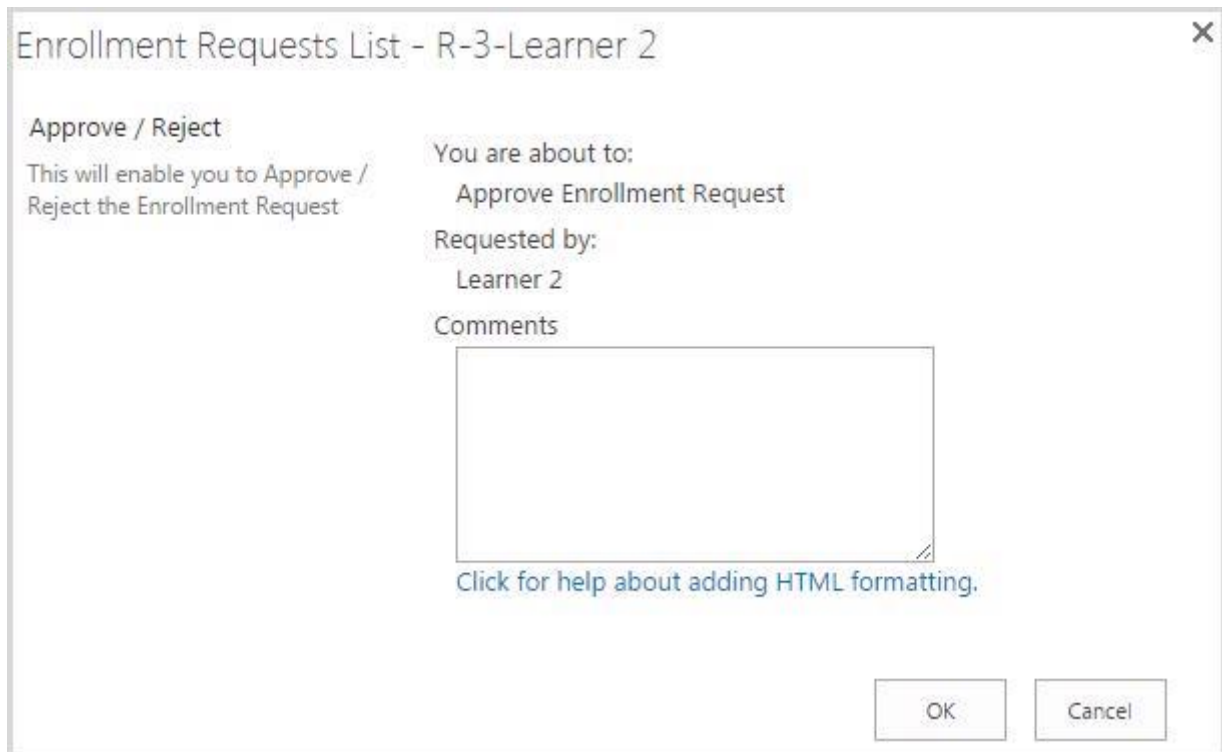
Content Type: Course Registration Request  
 Version: 1.0  
 Created at 4/18/2016 4:29 PM by  System Account  
 Last modified at 4/18/2016 4:29 PM by  System Account

Close

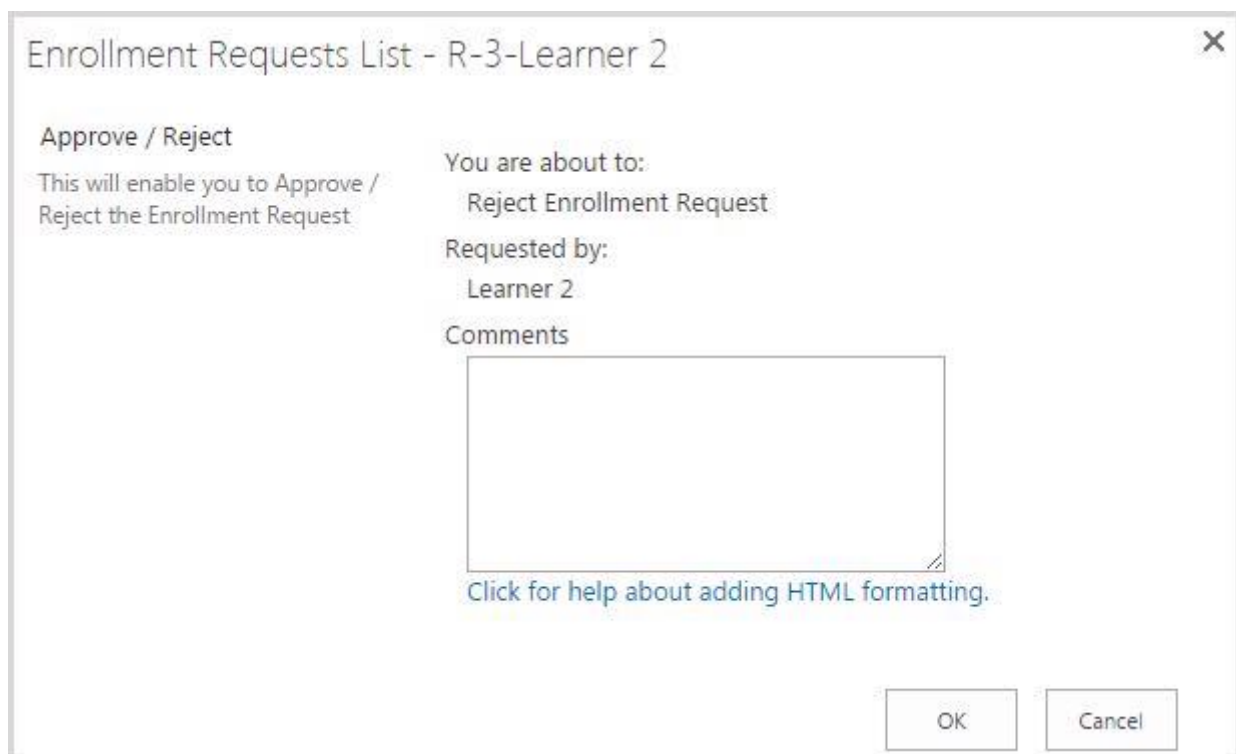
The following window will open after clicking Approve Request:



238



The following window will open after clicking Reject Request:



4. Click OK to submit approval/rejection. If the request is approved, the request is moved to general registrations list. If the request is rejected, the user receives the notifying message.

**NOTE:** The request can be deleted from the list only after it is approved/rejected.

If enabled in the enrollment template, a Course Registration Approval Request is sent to the Line Manager after Learner registers to course with Line Manager approval type. It is possible to approve/reject the enrollment request from this Email notification by clicking Approve or Reject link in the email:

**Subject:** Natalia Johns requests approval for training course 'Barista Training classroom'

You have received a new request to approve the following training course:

**Requested by:** Natalia Johns  
**Course name:** [Barista Training classroom](#)  
**Course Start date:** 16.10.2015 13:29  
**Course ID:** 20  
**Course Status:** Enrolled  
**Course Location:**

To approve or reject this request please click on the links below.

Click to [Approve](#)

Click to [Reject](#)

For any questions regarding this email notification please contact the LMS Administrator.


These links will redirect you to the Request Approval or Reject form.

**NOTE:** Comments made to the enrollment request are stored by the system and can be viewed in the Enrollment Requests list. To see them, modify view and add 'Approve/Reject comment' column:

Enrollment Requests List ⓘ

All Registrations ... Find an item 🔍

✓ Title	Status	User	Is Invoiced	Managers	Enrollment Request Answer	Approve/Reject comment
<b>Course : Business&amp;Management Course (2)</b>						
R-3-Learner 2 #	... Wait For Approval	<input type="checkbox"/> Learner 2	No	<input type="checkbox"/> ageucheva_a	Rejected	Sorry, you cannot enroll into this Course Offering.
R-6-Learner 3 #	... Wait For Approval	<input type="checkbox"/> Learner 3	No	<input type="checkbox"/> Assistant 3	Pending	

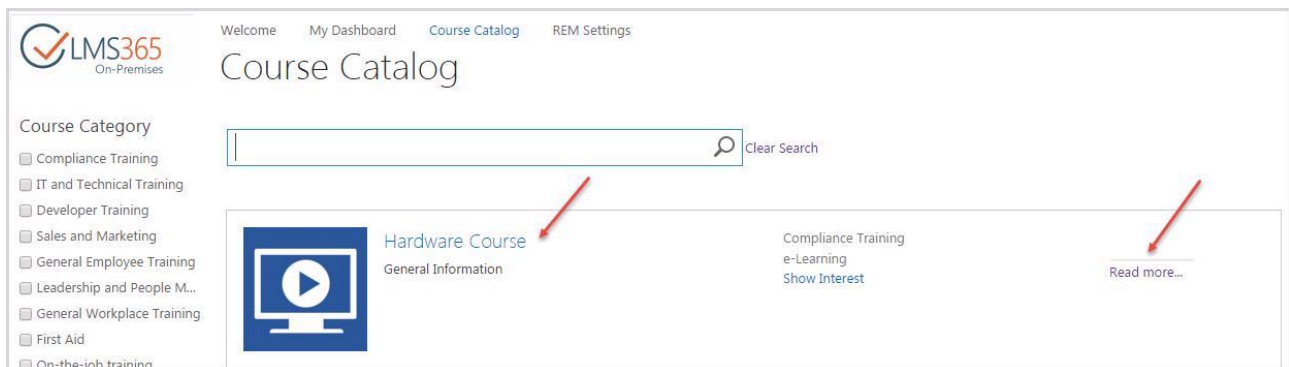


## 4.3 Learner's Operations

### 4.3.1 Enrolling in a Course

Do the following actions to enroll in a course:

1. Find the needed course in the course catalog search:



Course Catalog

Course Category

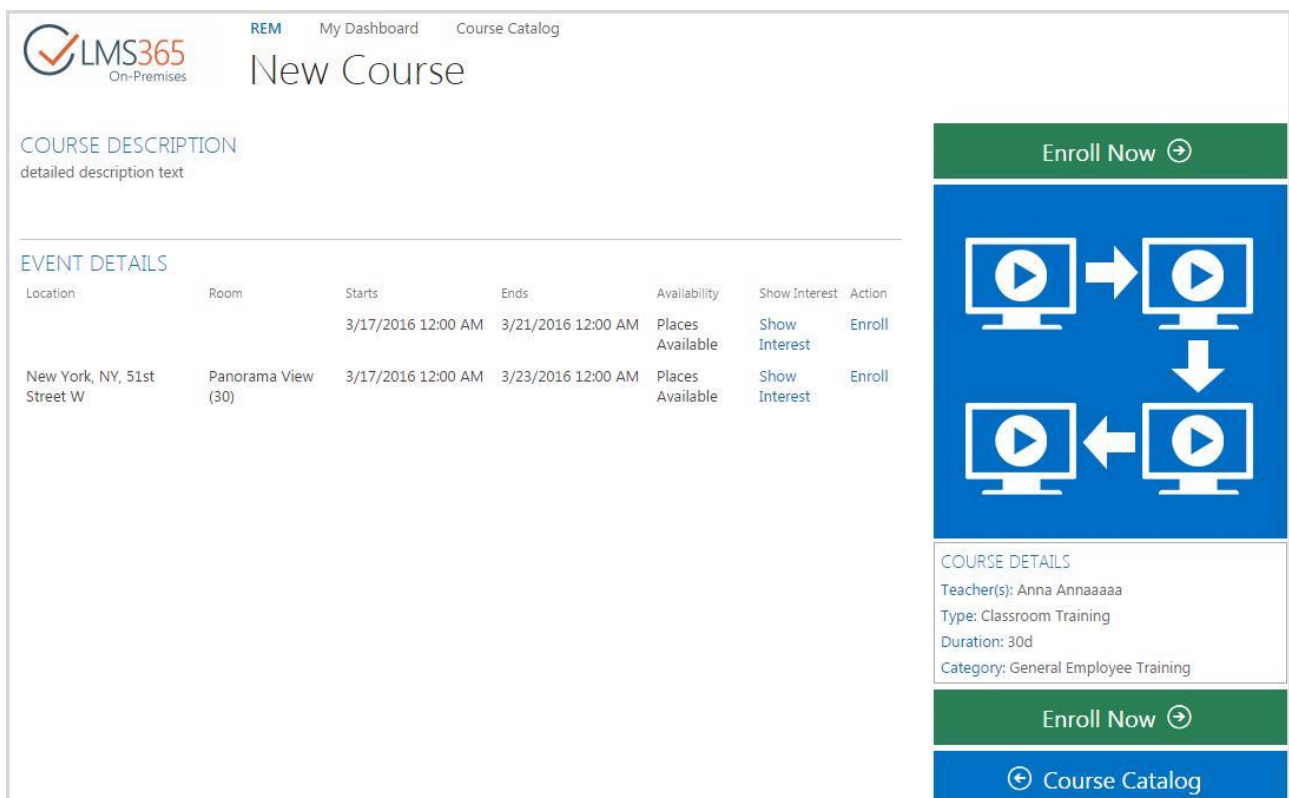
- Compliance Training
- IT and Technical Training
- Developer Training
- Sales and Marketing
- General Employee Training
- Leadership and People M...
- General Workplace Training
- First Aid
- On-the-job training

Hardware Course  
General Information

Compliance Training  
e-Learning  
Show Interest

Read more...

2. Click on its name or 'Read more...' link to open the course details page:



REM My Dashboard Course Catalog

## New Course

COURSE DESCRIPTION  
detailed description text

EVENT DETAILS

Location	Room	Starts	Ends	Availability	Show Interest	Action
		3/17/2016 12:00 AM	3/21/2016 12:00 AM	Places Available	Show Interest	Enroll
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 →

Enroll Now →

← Course Catalog

**NOTE:** If you have already enrolled in the course, you will see Registration Details page.

3. Select the Course Offering to enroll and click Enroll link in the Action column;

4. OR click 'Enroll' button and select Course Offering for enrollment in the pop-up window:

Select the Course Offering you like to enroll into...					
Location	Starts	Ends	Time Zone	Teachers	Availability
	3/17/2016 12:00 AM	3/21/2016 12:00 AM		Anna Annaaaaa	Places Available
New York, NY, 51st Street W	3/17/2016 12:00 AM	3/23/2016 12:00 AM		Anna Annaaaaa	Places Available

5. Complete the required fields and click OK:

### Enroll in - Hardware Course

---

User Information

**Login Name:\***

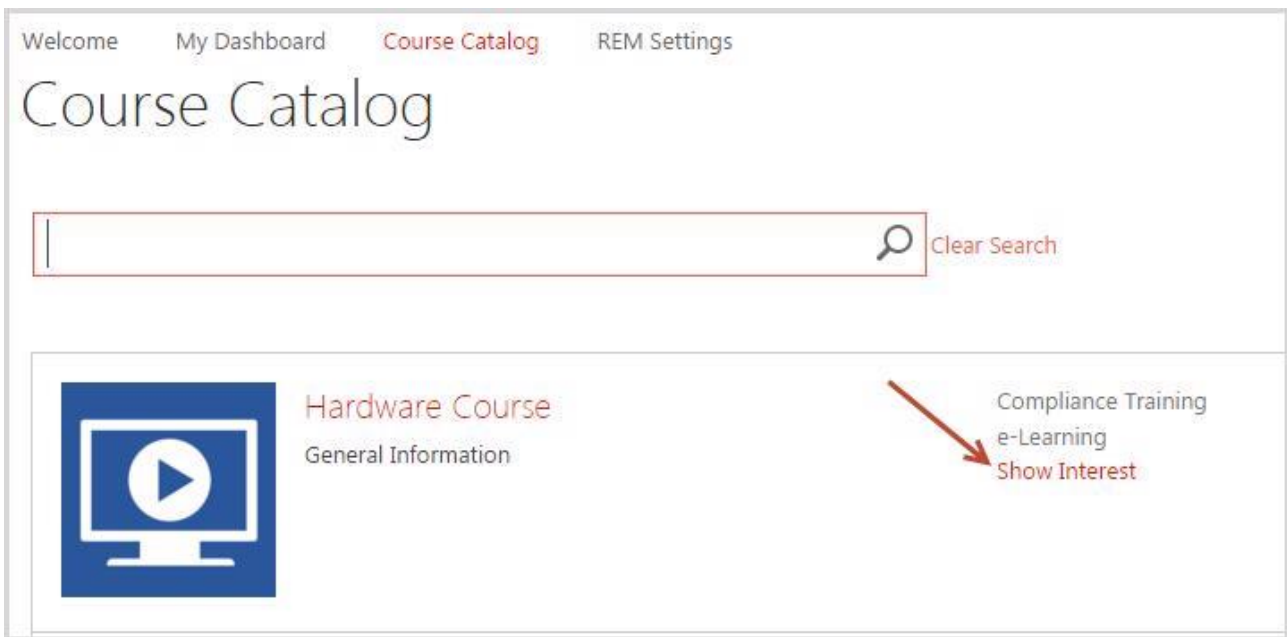
**Email: \***

**First Name: \***

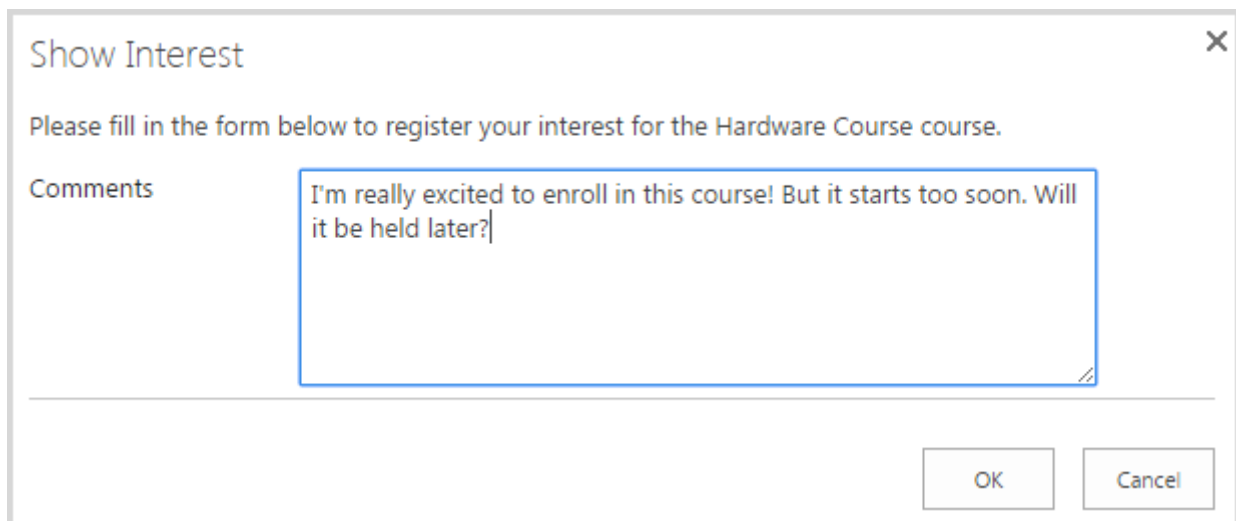
**Last Name: \***

Accept  [Terms and Conditions](#)

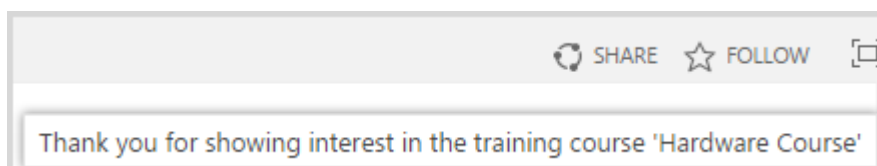
If you cannot enroll into a course, use 'Show Interest' link to leave your comment:



Type the text to explain the interest in the Comments section:



A confirmation message is displayed to notify that your comment has been recorded:



**NOTE** : If you try to enroll into a Course Offering with Automatic Approval type and Start Date in future, you will see the following message:

Enroll in - Computers and Technology Course ✕

## Wait for Start Date!

The enrollment request for the e-Learning Content Package course: 'Computers and Technology Course' has been received and awaits Access Period Start Date. Further instructions will be sent to your e-mail address.

[← Course Catalog](#)

[My Dashboard →](#)

You will be enrolled into the Course as soon as Start Date comes.

If you try to enroll into a Course Offering with Line Manager Approval type and Start Date in future, you will see the following message:

Select the Course Offering you like to enroll into... ✕

## Approval is required!

The enrollment request for the e-Learning Course Site course: 'New Course' has been received and is currently waiting for management approval. Further instructions will be sent to your e-mail address.

[← Course Catalog](#)

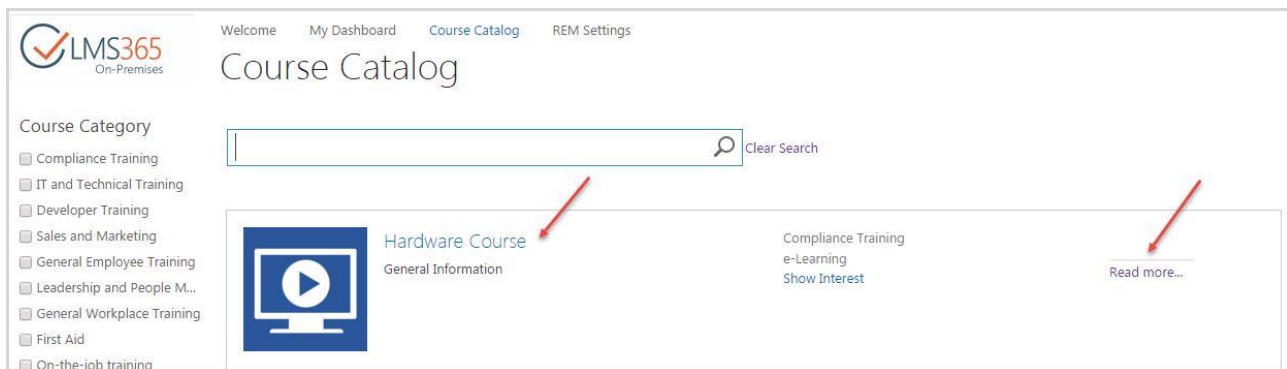
[My Dashboard →](#)

When your enrollment request is approved and Start Date comes, you will be enrolled into the Course.

### 4.3.2 Viewing Courses

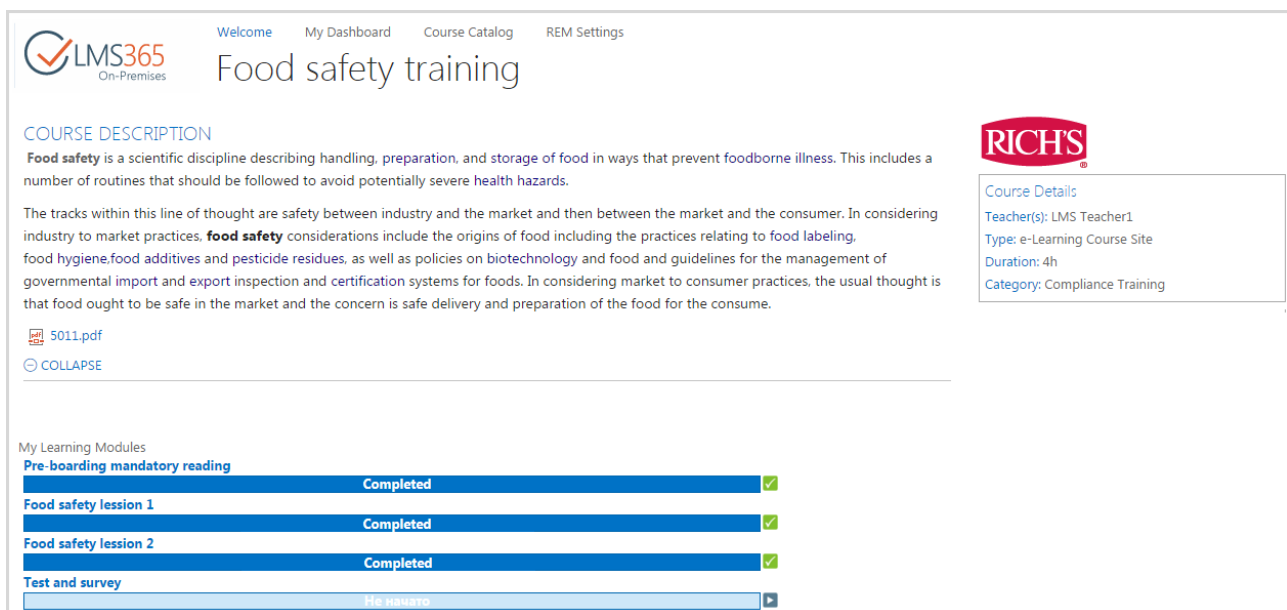
After enrollment you can go to the Course page from the Course Catalog by clicking 'Read more' link or course's title:











This link opens Registration Details page, which displays information related to Learner's course registration. Right part of each page shows Course image and general Course Details. Left part of the page contains different web parts displaying information about the Course Offering depending on course type.

For *e-Learning Course Sites* and *e-Learning Content Packages* the following web parts are displayed:









- Course Description – displays course long description;
- My Learning Modules – the web part shows information about learning items in course, Learner's current progress on them and action buttons for passing these items:

### My Learning Modules

- Introduction**  
Completed  
- General Information**  
Not Started 
- Accounting**  
Not Started 
- Company Principles**  
In Progress 
- General Methods**  
In Progress 
- Test**  
Out Of Attempts 

The following buttons appear for learning objects depending on their status:

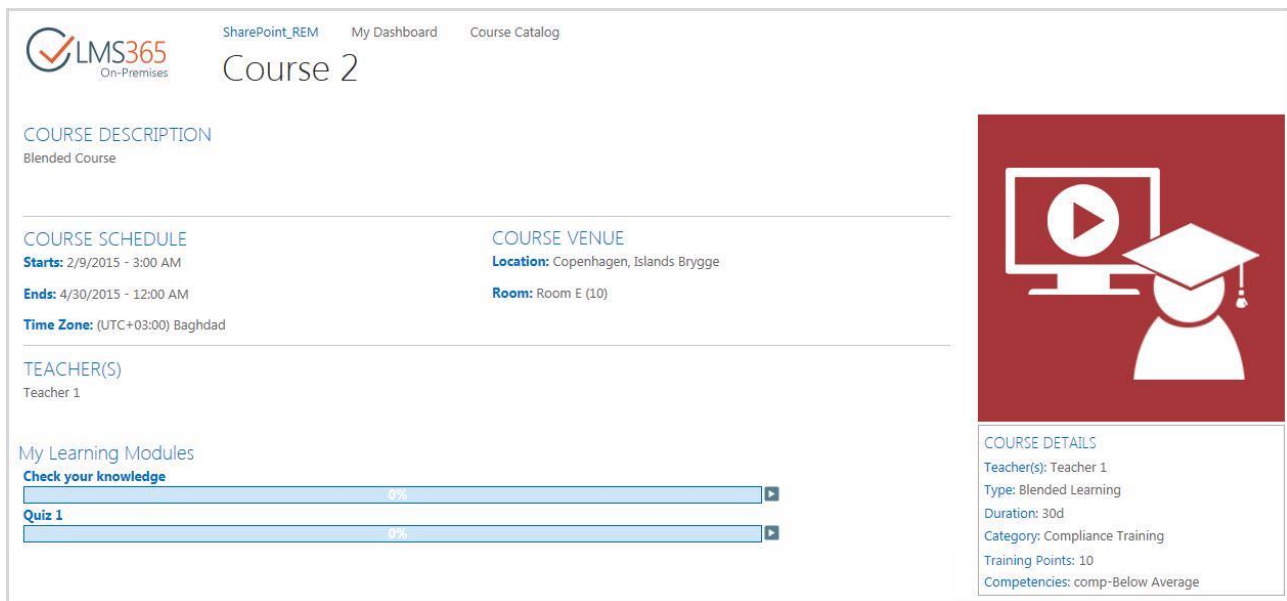
-  **Start** user does not have any attempts;
-  **Locked** user has not completed prerequisites for the item;
-  **New Attempt** user had some attempts and did not pass them;
-  **Completed** user had some attempts and passed them;
-  **Continue** user had some attempts but did not complete them;
-  **Out of Attempts** user has no more attempts.

When a certificate is granted for the completed item user can view it by clicking the certificate icon (📄) next to the item.

This web part changes depending on Learner's registration status:

Registration status	Displayed Information	Available actions
<b>Wait for Approval</b>	web part is not displayed	-
<b>Waiting for Start Date</b>	web part is not displayed	-
<b>In Waiting List</b>	web part is not displayed	-
<b>Enrolled</b>	current progress is displayed	start new attempt, continue attempt
<b>Course Completed</b>	100% completed	no ability to start attempt
<b>Canceled</b>	web part is not displayed	-
<b>Certificate Expired</b>	100% completed	no ability to start attempt
<b>Course Not Completed</b>	current progress is displayed	no ability to start attempt

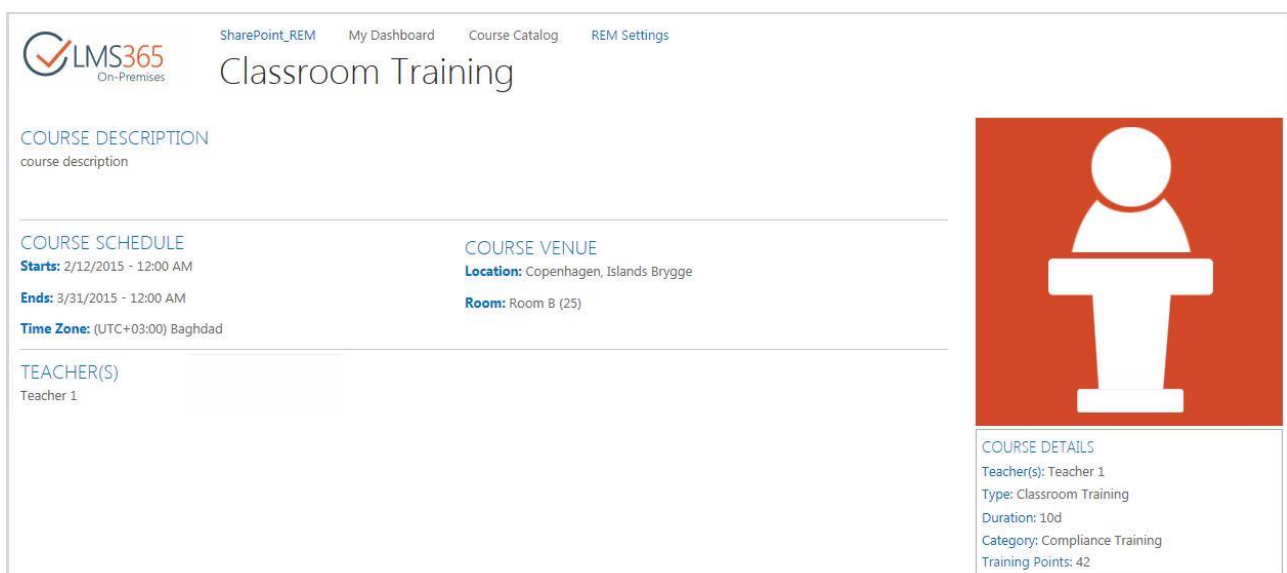
For *Blended Courses* the following web-parts are displayed:



The screenshot shows the 'Course 2' page in LMS365. The page includes a navigation bar with 'SharePoint\_REM', 'My Dashboard', and 'Course Catalog'. The main content is divided into several sections: 'COURSE DESCRIPTION' (Blended Course), 'COURSE SCHEDULE' (Starts: 2/9/2015 - 3:00 AM, Ends: 4/30/2015 - 12:00 AM, Time Zone: (UTC+03:00) Baghdad), 'COURSE VENUE' (Location: Copenhagen, Islands Brygge, Room: Room E (10)), 'TEACHER(S)' (Teacher 1), and 'My Learning Modules' (Check your knowledge, Quiz 1). A 'COURSE DETAILS' box on the right provides additional information: Teacher(s): Teacher 1, Type: Blended Learning, Duration: 30d, Category: Compliance Training, Training Points: 10, and Competencies: comp-Below Average. An icon of a person at a computer with a play button is also visible.

- Course Description – displays course long description;
- Course Schedule – displays information about course start and end date and time and time zone set for it;
- Course Venue – displays information about Location and Room where the training will be held;
- Teacher(s) – shows names of Teacher and Additional Teachers (if selected).

For *Classroom Training Courses* the following web-parts are displayed:

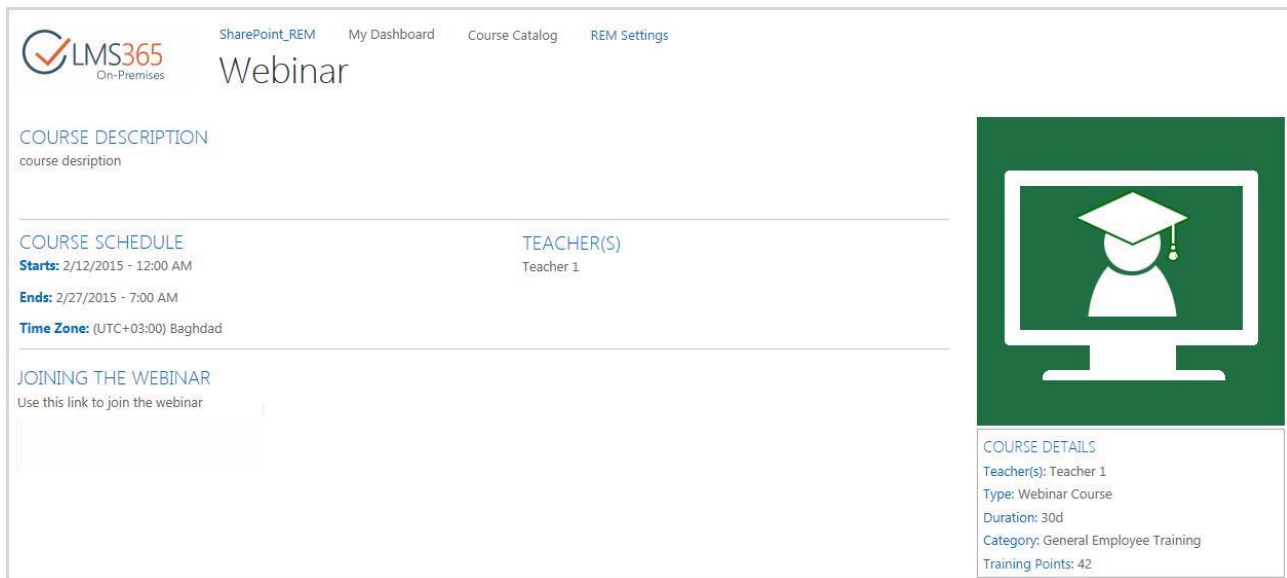


The screenshot shows the 'Classroom Training' page in LMS365. The page includes a navigation bar with 'SharePoint\_REM', 'My Dashboard', 'Course Catalog', and 'REM Settings'. The main content is divided into several sections: 'COURSE DESCRIPTION' (course description), 'COURSE SCHEDULE' (Starts: 2/12/2015 - 12:00 AM, Ends: 3/31/2015 - 12:00 AM, Time Zone: (UTC+03:00) Baghdad), 'COURSE VENUE' (Location: Copenhagen, Islands Brygge, Room: Room B (25)), 'TEACHER(S)' (Teacher 1), and 'COURSE DETAILS' (Teacher(s): Teacher 1, Type: Classroom Training, Duration: 10d, Category: Compliance Training, Training Points: 42). An icon of a person at a podium is also visible.

- Course Description – displays course long description;

- Course Schedule – displays information about course start and end date and time and time zone set for it;
- Course Venue – displays information about Location and Room where the training will be held;
- Teacher(s) – shows names of Teacher and Additional Teachers (if selected).

For *Webinar Courses* the following web-parts are displayed:



- Course Description – displays course long description;
- Course Schedule – displays information about course start and end date and time and time zone set for it;
- Teacher(s) – shows names of Teacher and Additional Teachers (if selected);
- Joining the Webinar – the web part contains meeting invitation that allows Learners join the webinar.

For *Material Courses* the following web-parts are displayed:

SharePoint LMS - Learning Management Suite for SharePoint Newsfeed OneDrive Sites Natalia Buhtik

SHARE FOLLOW

---

**THE AMERICAN BARISTA & COFFEE SCHOOL** Courses Administration REM Settings My Dashboard

## General Policy

**COURSE DESCRIPTION**  
 Course for new employees to introduce the general policy of our company.

---

**TRAINING MATERIALS**  
 The below document(s) should be read and understood:  
 Training Materials for this course:  
[General Policy.docx](#)  
 Use this [link](#) to view the materials on our corporate site.  
 Or watch the video to get the general idea:

LMS365 introduction video

Learner Name	Number Of Training Packages	Total Number Of Attempts	Average Spent Time	Total Number Of Attempts
...	...	...	...	...

**Terms And Conditions**  
 By clicking on the confirmation button I am acknowledging that I have completed this training.

I Agree Confirm



**COURSE DETAILS**  
 Teacher(s): Natalia Buhtik  
 Type: Material  
 Category: General Employee Training

- Course Description – displays course long description;
- Training Materials – contains materials added to the Course Offering. It may contain text description, links, attached documents, embedded video – all materials should be read and understood in the course;
- Material Confirm button. By clicking this button Learner acknowledges that he has read and understood course materials;  
 Depending on the Course Offering settings it may require two variants of authorization:
  - Simple Check Box – a checkbox with “I Agree” option is added next to the button:

**Terms And Conditions**

By clicking on the confirmation button I am acknowledging that I have completed this training.

I Agree

**Confirm** ✓

- Password Authorization - a password field is added next to the "Confirm" button:

**Terms And Conditions**

By clicking on the confirmation button I am acknowledging that I have completed this training and my password is my signature.

Your password

**Confirm** ✓

**NOTE:** For offerings with automatic approval and free payment type it's possible to confirm you read the materials without enrollment from the course offering details page. A registration item will automatically be created in 'Course Completed' status.

For *completed* courses a message confirming Course Completion with a link to My Dashboard is displayed:

Huber Demo Course □ ×

**COURSE DESCRIPTION**  
A demo course for all Huber employess


---

**Training Completed**  
You have completed this training. Go to [My Dashboard](#) to get the full overview of your training...
✓

**My Learning Modules**  
There are no items to show in this view.

---

[GO TO FULL COURSE SITE FOR ADDITIONAL RESOURCES & INFORMATION](#)



**COURSE DETAILS**  
 Type: e-Learning Course Site  
 Duration: 1d  
 Category: Compliance Training  
 Competencies: Self Management-Knowing Your Job

The following message is displayed for *completed* courses for Material course types:

### TRAINING MATERIALS

The below document(s) should be read and understood:

LIA RFC (v1.0) (1 MB)

Reading Completed

You indicated that you have already read this document



#### COURSE DETAILS

Type: Material

Category: Compliance Training

Training Points: 42

## 5 DASHBOARD OPERATIONS

### 5.1 Common Operations

This section contains information regarding operations that can be carried out by all user roles.

#### 5.1.1 View My Dashboard (home page)

Dashboard homepage can be viewed by all user roles but cannot be modified by the employee. By default the Dashboard homepage contains the following elements:

- 1) Site logo;
- 2) Welcome text with links for creating new pages, sites, and lists;
- 3) Dashboard Links web part with links to My Dashboard instruments: My Training Overview, My Competencies, My Training Points, My Action Plan, My Certificates, and My Transcript:



**NOTE:** Profile information is taken from CCM or from SharePoint. This is controlled in Dashboard Settings (refer to REM & Dashboard Administration Guide to modify the setting). Profile information is collapsed by default.

**NOTE:** Dashboard will recognize Active profiles along with Incomplete ones. Deactivated profiles are not considered by the system.

#### 5.1.2 Managing Dashboard Tabs

You can edit each tab to display columns, progress, statuses, etc. that you need:



**User Mode**

Current ▾

**Mode**

Show all ▾

**Registration Status**

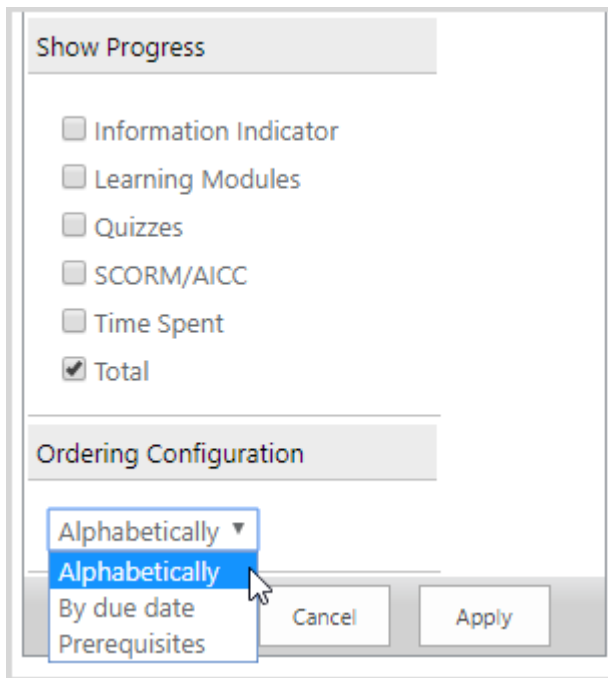
- Completed
- Enrolled
- Enrollment Canceled
- Expired
- Not Completed
- Not Enrolled
- Pending Approval
- Waiting for Start Date
- Waitlisted

**Show Columns**

- Average Score
- Category
- Completion Date
- Course Information
- Course Type
- Due Date
- Due Date Year
- Progress
- Start Date
- Status

In the Registration Status column, you can select which items to display in the modified Web Part (tab) regarding the statuses of the registrations.

For the Curriculum tab, it is possible to specify the ordering configuration, by which items will be ordered on the Dashboard:



- Alphabetically – select this option to order the items alphabetically disregarding their status;
- By due date – select this option to order the items by the due date. The curriculum with the soonest due date will be displayed at the top, and the one due the latest at the bottom of the list. The curriculums with no due date will be displayed alphabetically at the bottom of the list;
- Prerequisites – select this option to order the items according to their prerequisites. If there are prerequisites, a curriculum that is the prerequisite of another will be placed above it.

### 5.1.3 View My Training Overview

In this section, the logged in user is able to view his actual and completed training. All training are divided into six tabs: Current, Curriculums, Pending Approval, Waitlisted, Completed and All.

#### 5.1.3.1 Current Tab

Current – displays current user’s Registrations as well as Registrations with ‘Waiting for Start Date’ status to Course offerings from REM:

## My Training Overview

Current (3)		Curriculums (2)		Pending Approval (0)		Waitlisted (0)		Completed (0)		All (3)	
Name	Category	Course Type	Status	Start Date↓	Due Date	Progress					
<a href="#">Software Course (new)</a>	IT and Technical Training	e-Learning	Enrolled	4/1/2016		No Progress Tracked					
<a href="#">Hardware Course</a>	IT and Technical Training	e-Learning	Enrolled	4/1/2016	6/15/2016	Not Started					
<a href="#">Introductory Course</a>	General Employee Training	Blended Learning	Enrolled	3/31/2016 7:07 PM		Completed					

Values for the columns are taken from REM course offerings:

- Name – displays Course Offering name.  
Clicking the Course Offering name opens the Registration details page in a pop-up window:

### Introductory Course

**COURSE DESCRIPTION**  
Introductory Course in Generals Workplace Safety

---


**COURSE SCHEDULE**  
**Starts:** 2015-01-26 - 12:00 AM  
**Ends:** 2015-02-25 - 12:00 AM  
**Time Zone:** (UTC+02:00) Nicosia

---

**COURSE VENUE**  
**Location:** Not Set  
**Room:** Not Set

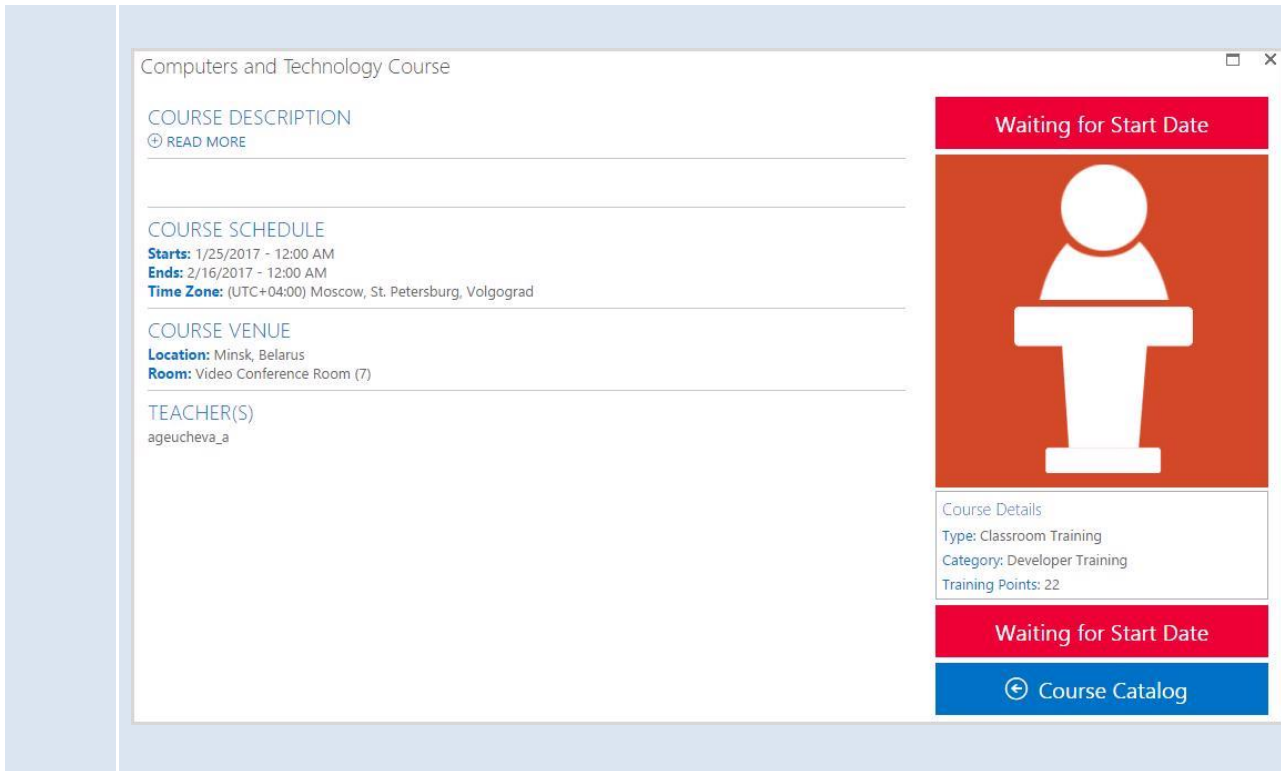
---

**TEACHER(S)**  
Teacher 1, Teacher 33



**COURSE DETAILS**  
**Teacher(s):** Teacher 1, Teacher 33  
**Type:** Blended Learning  
**Duration:** 30d  
**Category:** General Workplace Safety  
**Training Points:** 42

**NOTE** : For Course Offerings with 'Waiting for Start Date' status Registration details page has the following view:

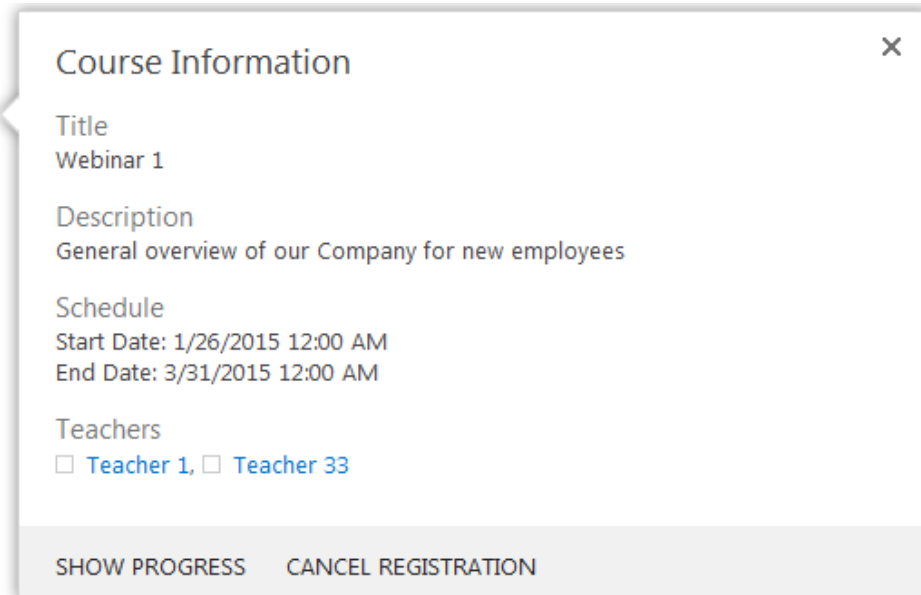


Clicking the 'Go to Course' (🏠) icon next to the Course Offering name opens corresponding LMS course site in a new browser tab. It is displayed in the Current tab only for Registrations to e-Learning Content and Blended Learning Courses with Enrolled status.

This icon is displayed depending on user's Registration status to e-Learning Content or Blended Learning course as shown in the table below:

Status	Tab	Current	Curriculums	Pending Approval	Waitlisted	Completed	All
Not Enrolled			Hidden				Hidden
	Waiting for Start Date	Hidden	Hidden				Hidden
Enrolled		Displayed	Displayed				Displayed
	Pending Approval			Hidden			Hidden
Waitlisted			Hidden		Hidden		
Canceled							Hidden
Expired			Hidden				Hidden
Completed			Displayed			Displayed	Displayed

- Callout menu (⋮) – contains Course Information and links “Show Progress” which opens user’s progress in a pop-up window and “Cancel Registration” which allows to cancel selected registration:



**Course Information** [X]

Title  
Webinar 1

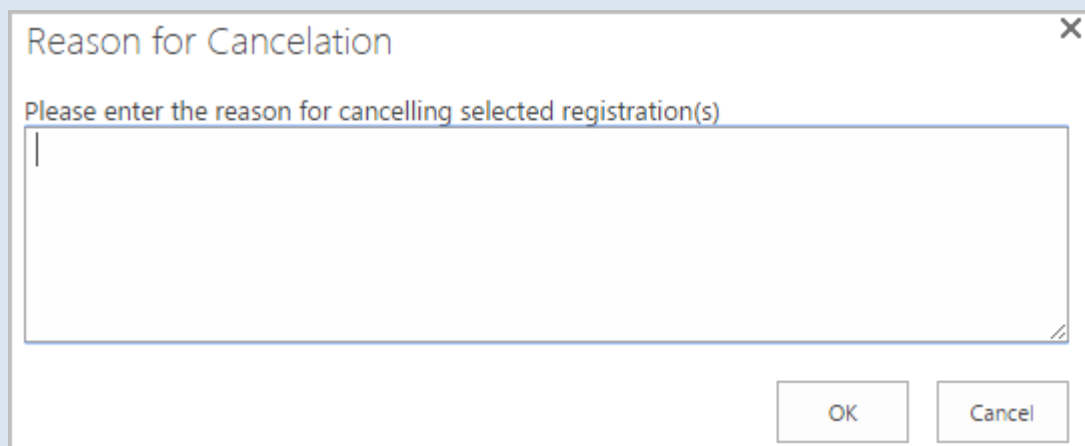
Description  
General overview of our Company for new employees

Schedule  
Start Date: 1/26/2015 12:00 AM  
End Date: 3/31/2015 12:00 AM

Teachers  
 Teacher 1,  Teacher 33

SHOW PROGRESS    CANCEL REGISTRATION

**NOTE:** When you click ‘Cancel registration’ depending on settings a window may be displayed with Reason for Cancellation:



**Reason for Cancellation** [X]

Please enter the reason for cancelling selected registration(s)

[Text input field]

OK    Cancel

Fill in the field and confirm cancellation.

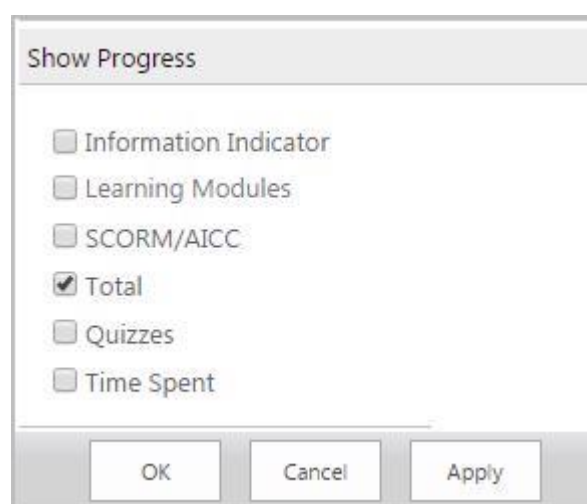
For *e-learning courses* and *blended courses* two more actions are available: “Go to Course Site” which opens LMS course site in a new browser tab and “Show Score” which opens user’s scores (shown in percentage terms) for all learning modules of the course in a pop-up window:

Module	Score
Introductory Quiz	A* (100 %)
Introduction	Passed (100 %)
General Information	Passed (100 %)
Accounting	A* (100 %)
Company Principles	Passed (100 %)
General Methods	Failed

**NOTE:** Attendance is not shown for e-Learning Course Site and Blended Learning courses.

- Category – displays course category;
- Course Type – displays the type of the course from REM Course Offering;
- Status – displays user’s status in the Course Offering taken from REM;
- Start Date – displays the Registration Enrollment Date;
- Due Date – displays the Due Date of Course Offering or Access End Date of Course Offering or is empty if Access End Date of Course Offering is not set;
- Progress – displays status of the course offering as ‘Not Started’, ‘In Progress’, ‘Completed’ or ‘No Progress Tracked’ (for Classroom Training courses and courses with ‘Waiting for Start Date’ status).

Display of Learning Modules, Quiz or SCORM/AICC progress can be configured in the web part settings:

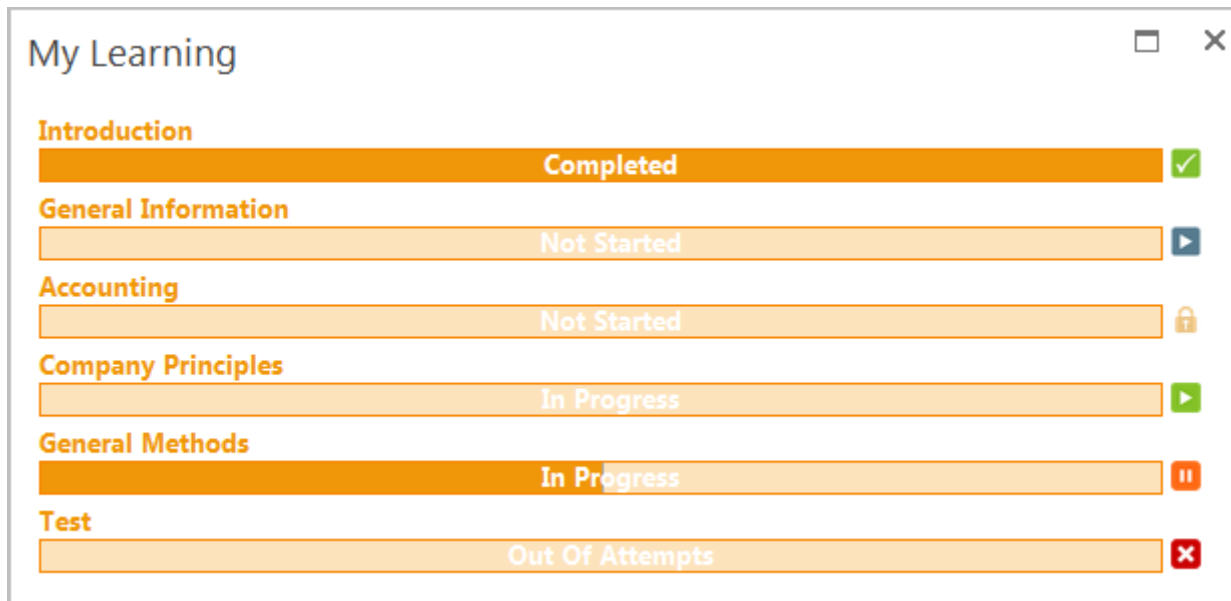


The 'Show Progress' dialog box contains the following options:

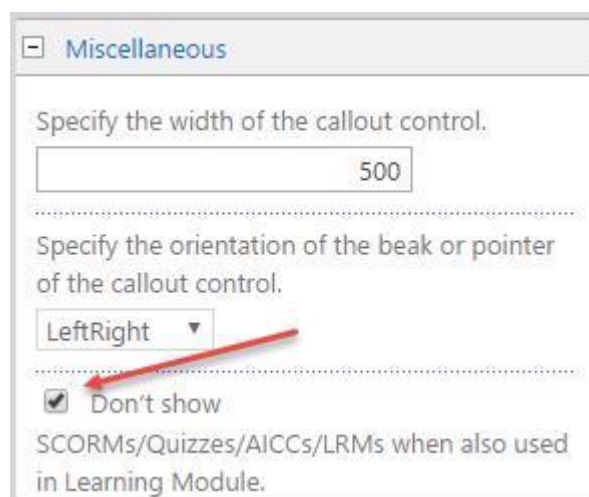
- Information Indicator
- Learning Modules
- SCORM/AICC
- Total
- Quizzes
- Time Spent

Buttons: OK, Cancel, Apply







For *e-learning* courses and *blended* courses a pop up window opens by clicking Menu > Show Progress which shows progress for each learning object:



It is possible to hide SCORMs, Quizzes, and AICCs when they are also used in a Learning Module in the web part settings > Miscellaneous:

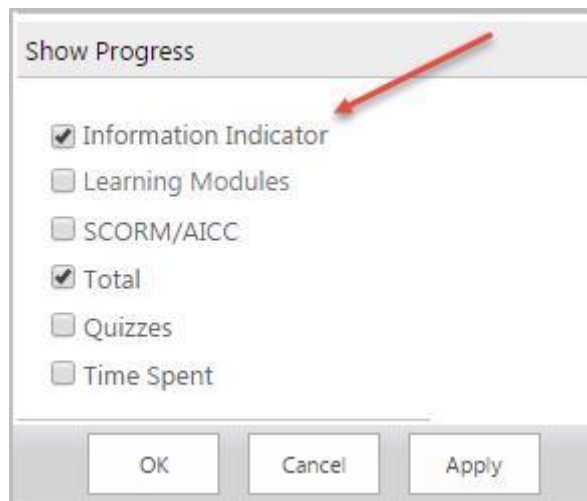


The following buttons appear for learning objects depending on their status:

-  **Start** user does not have any attempts;
-  **Locked** user has not completed prerequisites for the item;
-  **New Attempt** user had some attempts and did not pass them;
-  **Completed** user had some attempts and passed them;
-  **Continue** user had some attempts but did not complete them;
-  **Out of Attempts** user has no more attempts.




By clicking the corresponding button you can start\continue attempt.

It is possible enable Information Indicator in the web-part settings (by default it is disabled):



The indicator will be added before the progress bar. Clicking on it opens 'My Learning' web part in a pop-up:

My Training Overview

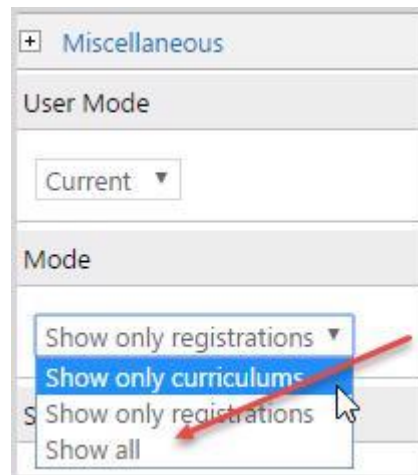
Name	Category	Course Type	Status	Start Date↓	Due Date	Progress
<a href="#">Software Course (new)</a>	...	IT and Technical Training	e-Learning	Enrolled	4/1/2016	 <span>No Progress Tracked</span>
<a href="#">Hardware Course</a>	...	IT and Technical Training	e-Learning	Enrolled	4/1/2016	6/15/2016  <span>Not Started</span>
<a href="#">Introductory Course</a>	...	General Employee Training	Blended Learning	Enrolled	3/31/2016 7:07 PM	 <span>Completed</span>

For *Classroom Training* percentage of Time Spent is displayed (if enabled in web part setting), which is taken from Attendance section in REM.

**NOTE:** LM/Quiz/SCORM is completed when at least one attempt is completed. Otherwise, the value for the progress bar is 0. If there is no Learning Modules, Quizzes or SCORMs in the course at all, the progress bar for corresponding type of learning item is not shown.

By default, only items from Registrations to courses are displayed in the Current tab (you can select registrations with what status to display in the [Web Part settings](#)). To display in this tab items from user's Curriculums, set 'Show All' mode in the web part settings:






### 5.1.3.2 Curriculums Tab

Curriculums – displays Curriculums assigned to user’s job, role or to the target audience to which user belongs and information about REM courses included in user’s Curriculums (curriculum progress is shown in brackets):

My Training Overview					
Current (4)	Curriculums (6)	Pending Approval (0)	Waitlisted (0)	Completed (6)	All (19)
Name	Category	Course Type	Status		
<b>Curriculum : New Hire basic Training (Completed: 1 out of 3)</b> ⓘ					
LMS 365 for SharePoint Online	IT and Technical Training	e-Learning	Not Enrolled		
LMS365 Video Training	Sales and Marketing	Material	Completed		
Classroom Training	Compliance Training	Classroom Training	Locked		
<b>Curriculum : Project Manager (Completed: 0 out of 4)</b> ⓘ					
Hardware Course	Compliance Training	e-Learning	Enrolled		
PowerU Training	IT and Technical Training	Classroom Training	Locked		
Mary Kay Sales Training	Compliance Training	Material	Locked		
Classroom Training	Compliance Training	Classroom Training	Locked		
<b>Curriculum : LMS365 Project Manager Foundation (Locked by: Project Manager)</b> ⓘ					
Understanding LMS365 - the cloudbased LMS for SharePoint	IT and Technical Training	e-Learning	Locked		
LMS 365 for SharePoint Online	IT and Technical Training	e-Learning	Locked		
LMS365   Learning Management for Office 365	IT and Technical Training	e-Learning	Locked		
LMS365 Video Training	Sales and Marketing	Material	Locked		
LMS 365 Launch	Sales and Marketing	Material	Locked		
<b>Curriculum : Instructional designer - required training (Completed: 2 out of 4)</b> ⓘ					

Values for the columns are taken from REM course offerings:

- Name – displays Curriculum name and names of Courses included in the Curriculum.

Clicking Information icon  next to the Curriculum name opens Curriculum Information dialog. The following information is displayed in it:

✕

### Curriculum Information

Description

The Barista Basics Training Program provides the initial training for a newly hired barista on essential skills and knowledge required to the barista role at Starbucks Coffee Company. Through the use of simple and intuitive tools, skills are taught through one-to-one delivery and on-the-job training. It is a highly effective learning experience for a new barista that quickly enhances confidence and competence in delivering customer service.

Status  
Expired

Issued Date  
5/25/2016

Expiration Date  
5/26/2016

SHOW CERTIFICATE

✕

### Curriculum Information

Description

IT Technicians hold one of the most important jobs for any company. It will be your role to keep computers and related systems running smoothly and efficiently. You could be responsible for fielding telephone calls or responding to help-desk messages from individuals who are experiencing problems with their computers. The role of IT Support Technician is vital within any businesses and with our Diploma your skills will be highly in demand.

Status  
In progress

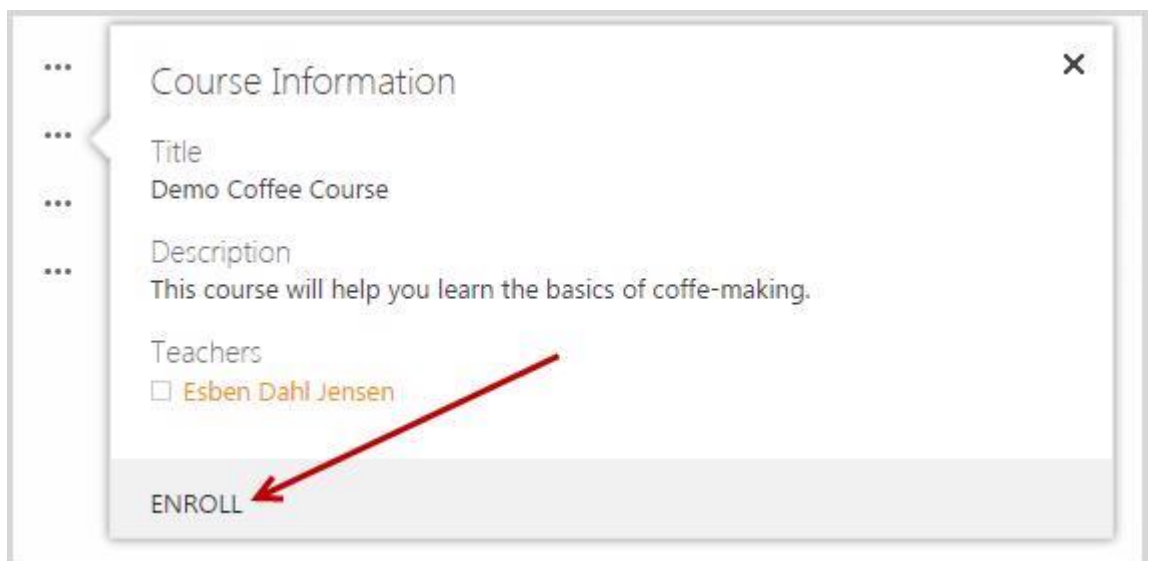
Due Date  
6/23/2016

- Description – contains Curriculum description;
- Status – contains Curriculum status. It can be as follows:
  - Not Started – if a user is not enrolled in any course (or his registrations have the following statuses: Wait for Approval, Waiting for Start Date, In Waiting List, Course Not Completed, Canceled);

- In Progress – if a user is enrolled at least in one course or one course is completed and other registrations to courses have the following statuses: Not Enrolled, Wait for Approval, Waiting for Start Date, In Waiting List, Course Not Completed, Canceled;
- Completed – if there is a valid Curriculum certificate or all courses are completed;
- Expired – if Curriculum certificate has expired;
- Issued Date/Expiration Date – display issued and expiration dates of curriculum certificate (if a user has such a certificate);
- Due Date – displays Curriculum due date (if a user does not have curriculum certificate);
- Show Certificate – if a user has curriculum certificate, clicking this link will open his certificate in a new browser tab.

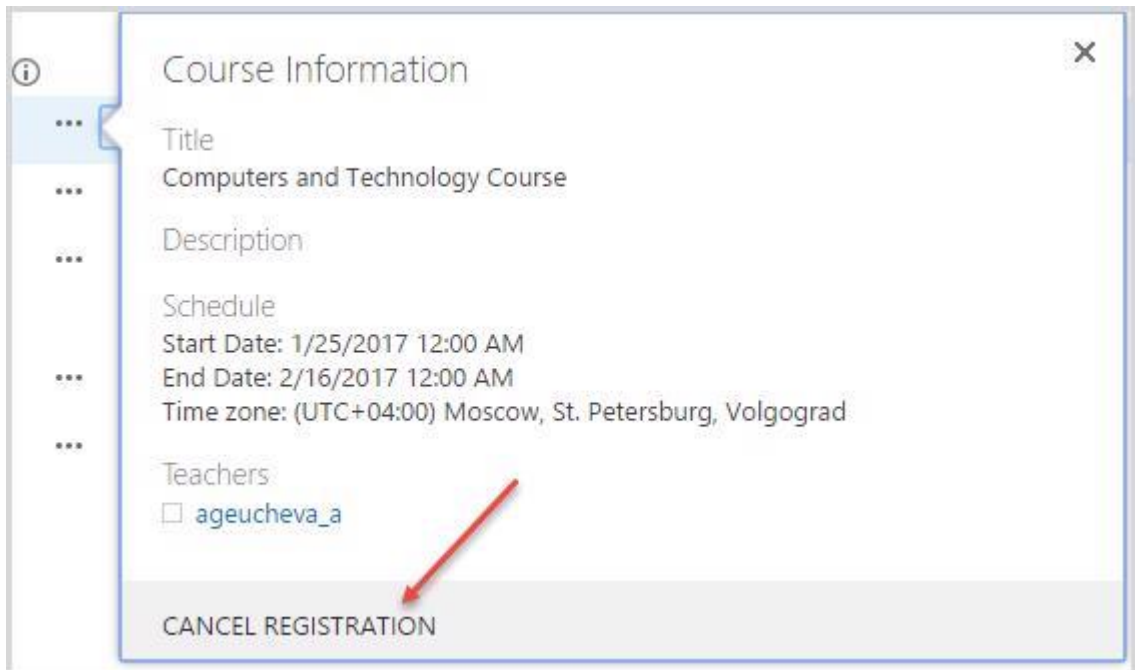
Clicking the 'Go to Course' (🔗) icon next to the Course Offering name opens corresponding LMS course site in a new browser tab. It is displayed in the Curriculums tab only for Registrations to e-Learning Content and Blended Learning Courses with Enrolled and Completed status;

- Callout menu (⋮) – contains Course Information and "Cancel registration", "Go to Course Site", "Show Progress", "Show Score" or "Show Certificate" links depending on the Registration status. "Enroll" link is available for courses:
  - with 'Not Enrolled' status;
  - with 'Enrollment Canceled' status if user has single canceled registration without having other active (Enrolled, Waitlisted, Pending Approval) registrations. For such registrations only 'Enroll' link is displayed in the callout menu:

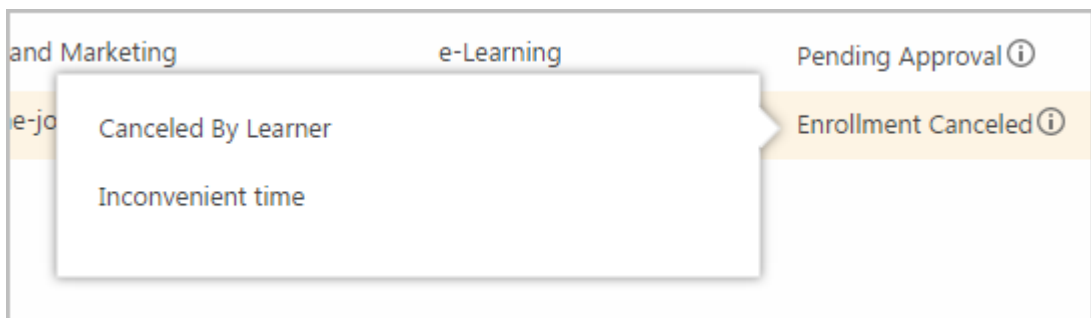


"Enroll" link allows enrolling in the course. The link opens a pop-up window with REM enrollment form;

For Registrations with 'Waiting for Start Date' status only "Cancel Registration" link is available:



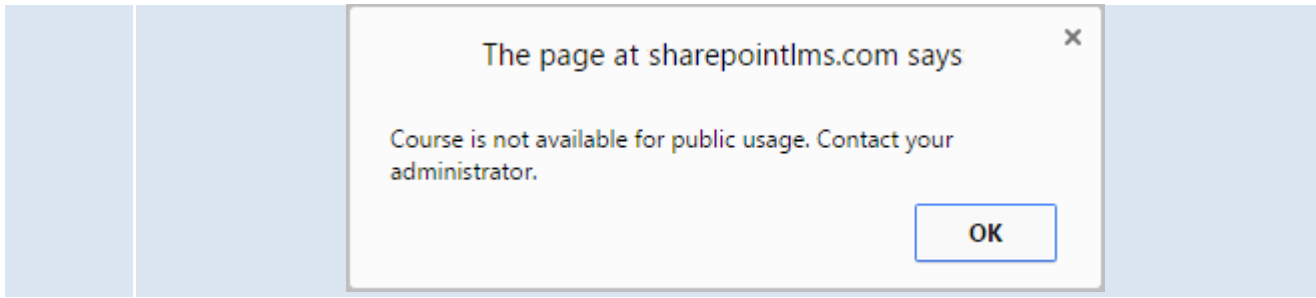
- Category – displays the category of the course from REM Course Offering;
- Course Type – displays the type of the course from REM Course Offering;
- Status – displays user's status in the Course Offering taken from REM with information indicators next to statuses with comments. Hover over the (i) sign to view additional information on the registration status:



'Not Enrolled' status is displayed if user is not enrolled to any Course Offering for this course. This link allows enrolling into the first course of the Curriculum.


**NOTE:** Curriculums tab is added after the ELEARNINGFORCE - REM: Curriculum feature activation.

**NOTE:** If a course included in the curriculum has 'Not published' status, it is impossible to view the course. The following message will be displayed after clicking on it:



If Course Flow is set for the Curriculum, only the first Course of the Curriculum is available for Learner, all other Courses have 'Locked' status until all previous courses have been completed:

My Training Overview

Current (4)	Curriculums (6)	Pending Approval (0)	Waitlisted (0)	Completed (6)	All (19)
Name	Category	Course Type	Status		
▶ Curriculum : New Hire basic Training (Completed: 1 out of 3)					
☒ Curriculum : Project Manager (Completed: 0 out of 4)					
Hardware Course 	...	Compliance Training	e-Learning	Enrolled	
PowerU Training	...	IT and Technical Training	Classroom Training	Locked	
Mary Kay Sales Training	...	Compliance Training	Material	Locked	
Classroom Training	...	Compliance Training	Classroom Training	Locked	

When the first Course is completed, the next Course becomes available:

My Training Overview

Current (3)	Curriculums (3)	Pending Approval (1)	Waitlisted (0)	Completed (0)	All (13)
Name	Category	Course Type	Status		
▶ Curriculum : New Hire basic Training (Completed: 1 out of 3)					
☒ Curriculum : Project Manager (Completed: 0 out of 4)					
Employee On-boarding Part I	...	General Workplace Training	e-Learning	Completed	
Employee On-boarding Part II	...	General Workplace Training	e-Learning	Not Enrolled	
Demo Coffee Course	...	General Employee Training	e-Learning	Locked	
Coffee Demo Classroom Training	...	General Workplace Training	Classroom Training	Locked	

### 5.1.3.3 Pending Approval Tab

Pending Approval – displays Registrations to Course offerings from REM with status “Wait for Approval”:

## My Training Overview

My Training Overview						
Current (2)	Curriculums (3)	Pending Approval (1)	Waitlisted (0)	Completed (0)	All (4)	
Name	Category	Course Type	Status	Start Date ↓	Due Date	
<a href="#">Hardware Course</a> ...	IT and Technical Training	e-Learning	Pending Approval ⓘ	4/1/2016	6/15/2016	

Values for the columns are taken from REM course offerings:

- Name – displays Course Offering name. Clicking the Course Offering name opens the Registration details page in a pop-up window;
- Callout menu (...) – contains Course Information and “Cancel Registration” link which allows to cancel selected registration:

### Course Information ✕

**Title**  
Sales department

**Description**  
Training for sales department

**Schedule**  
Start Date: 1/26/2015 12:00 AM  
End Date:

**Teachers**  
 [Teacher 1](#)

**CANCEL REGISTRATION**

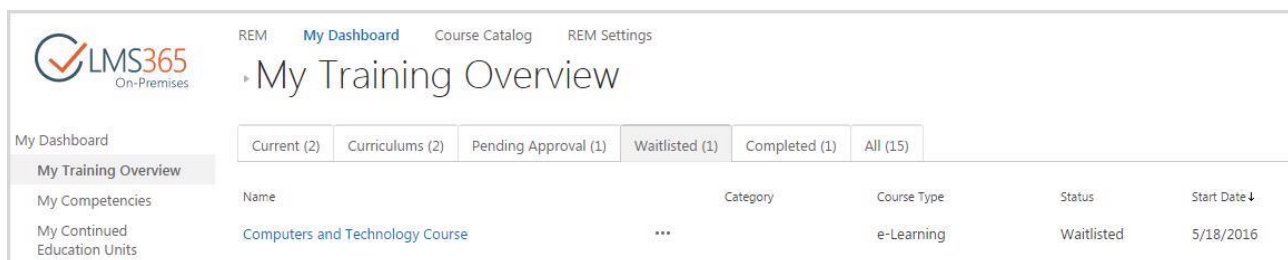
- Category – displays the category of the course from REM Course Offering;
- Course Type – displays the type of the course from REM Course Offering;
- Status – displays user’s status in the Course Offering taken from REM with information indicators next to statuses with comments. Hover over the (i) sign to view additional information on the registration status:

Category	Course Type	Status
Your registration is currently pending manual action from the LMS Administrator		Pending Approval ⓘ

- Start Date - displays the Access Start Date of Course Offering;
- Due Date - displays the Access End Date of Course Offering (or is empty if it is not set).

#### 5.1.3.4 Waitlisted Tab

Waitlisted – displays Registrations to Course offerings from REM with status “In Waiting List”:



REM My Dashboard Course Catalog REM Settings

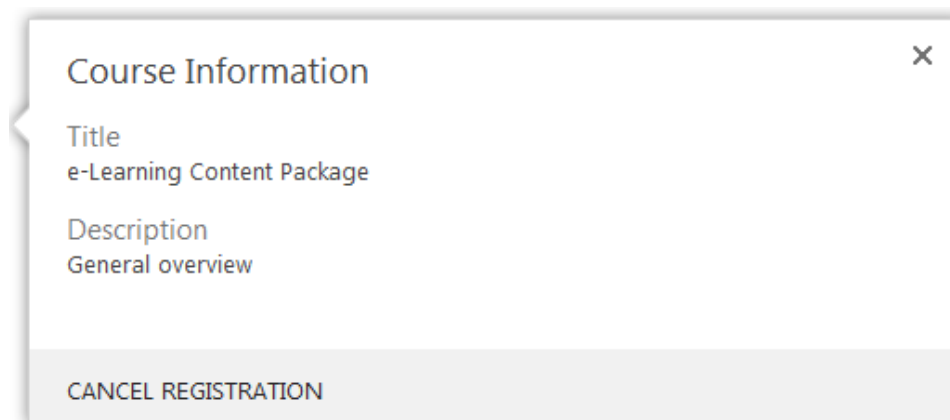
My Training Overview

Current (2) Curriculums (2) Pending Approval (1) **Waitlisted (1)** Completed (1) All (15)

Name	Category	Course Type	Status	Start Date ↓
Computers and Technology Course	...	e-Learning	Waitlisted	5/18/2016

Values for the columns are taken from REM course offerings:

- Name – displays Course Offering name. Clicking the Course Offering name opens the Registration details page in a pop-up window;
- Callout menu (\*\*\*) – contains Course Information and “Cancel Registration” link which allows to cancel selected registration:



**Course Information** [X]

Title  
e-Learning Content Package

Description  
General overview

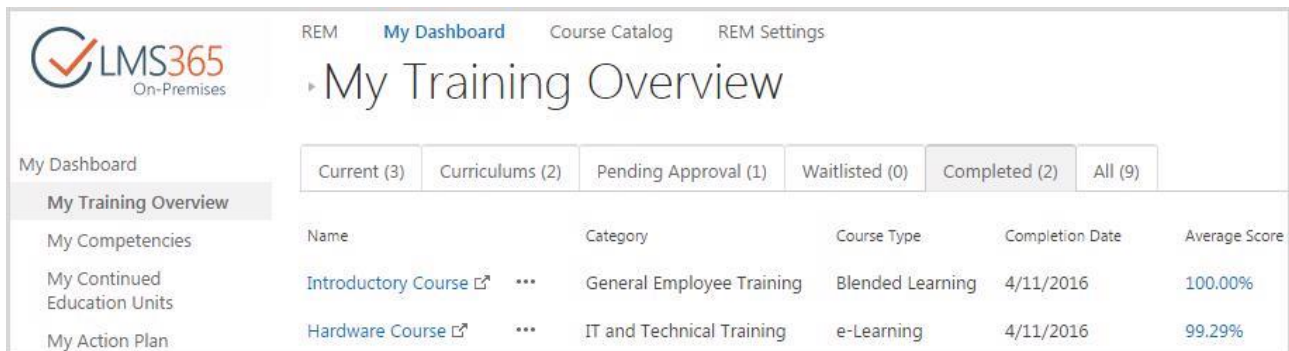
CANCEL REGISTRATION

- Course Type – displays the type of the course from REM Course Offering;
- Status – displays user’s status in the Course Offering taken from REM;

- Start Date - displays the Access Start Date of Course Offering;
- Due Date - displays the Access End Date of Course Offering (or is empty if it is not set).

### 5.1.3.5 Completed Tab

Completed - displays Registrations to Course offerings taken from REM with "Completed" status:



My Dashboard		REM	My Dashboard	Course Catalog	REM Settings		
My Training Overview							
		Current (3)	Curriculums (2)	Pending Approval (1)	Waitlisted (0)	Completed (2)	All (9)
My Training Overview	Name	Category	Course Type	Completion Date	Average Score		
My Competencies	Introductory Course <a href="#">↗</a>	***	General Employee Training	Blended Learning	4/11/2016	100.00%	
My Continued Education Units	Hardware Course <a href="#">↗</a>	***	IT and Technical Training	e-Learning	4/11/2016	99.29%	
My Action Plan							

Values for the columns are taken from REM course offerings:

- Name – displays Course Offering name. Clicking the Course Offering name opens the Registration details in a pop-up window. Clicking the 'Go to Course' ([↗](#)) icon next to the Course Offering name opens corresponding LMS course site in a new browser tab. It is displayed in the Completed tab only for Registrations to e-Learning Content and Blended Learning Courses with Completed status;
- Callout menu (\*\*\*) – contains Course Information and links "Show Certificate" which opens the certificate in a new page, "Show Progress" which opens user's progress in a pop-up window and "Show Score" which opens user's score (in percentage terms) in a pop-up window, "Go to Course Site" which opens Course Site page, "Enroll" which allows enrolling into the course. "Enroll" link is available only if user has single completed registration without having other active (Enrolled, Waitlisted, Pending Approval) registrations:



Course Information
✕

**Title**  
Leadership

**Description**  
This course is a program for leadership development

SHOW CERTIFICATE
SHOW PROGRESS
SHOW SCORE

GO TO COURSE SITE
ENROLL

- Category – displays the category of the course from REM Course Offering;
- Course Type – displays the type of the course from REM Course Offering;
- Completion Date – displays registration completion date;
- Average Score – displays the average score (in percentage terms) gained by the user for the course. It is calculated as arithmetical mean of percent view of all columns (except AWG and Banding item columns) in Grade Book.

**NOTE:** If a learning object is not added to the Grade Book, it is not counted in the Average Score.

#### 5.1.3.6 All Tab

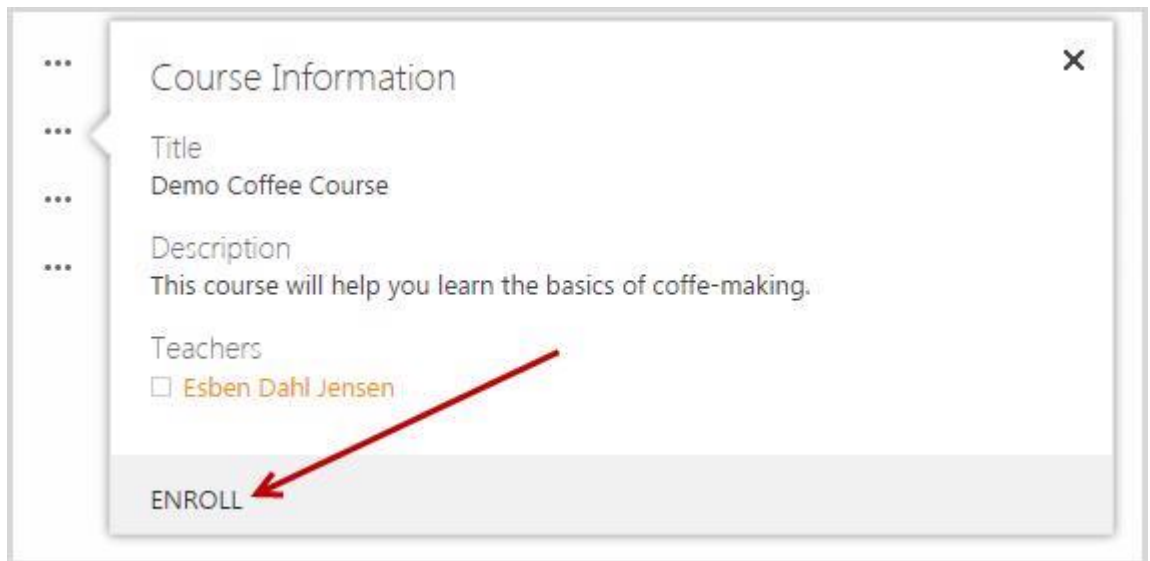
All – displays all user’s Registrations to Course offerings from REM:

## My Training Overview

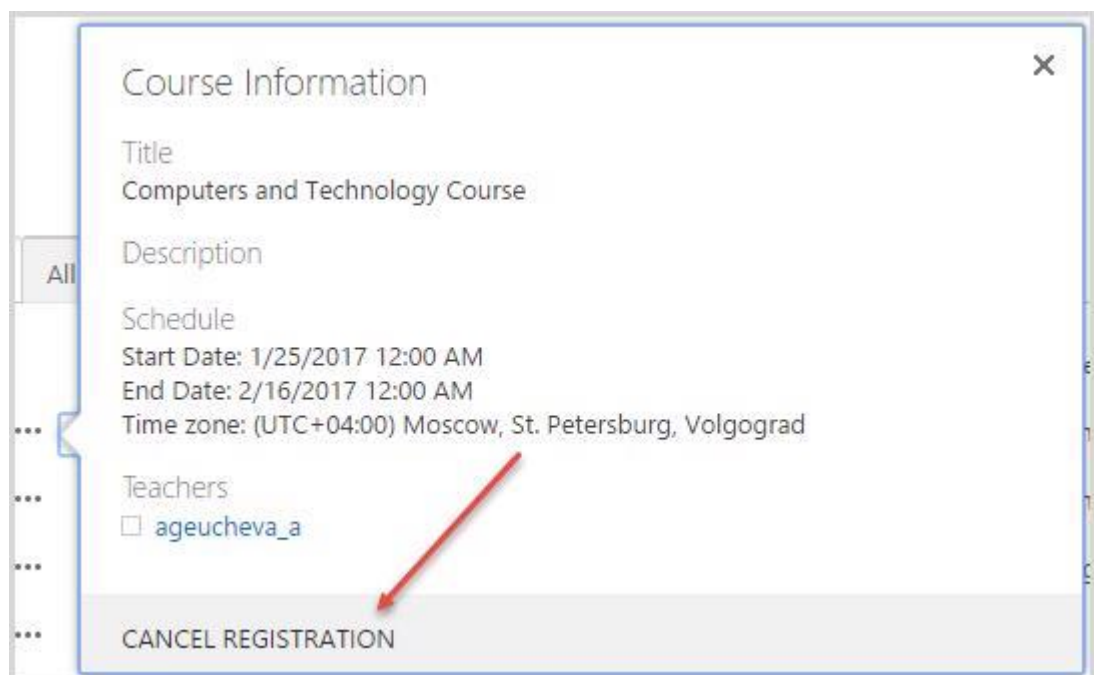
Current (3)	Curriculum (2)	Pending Approval (1)	Waitlisted (0)	Completed (2)	All (9)
Name	Category	Course Type	Status		
<a href="#">New Course</a>	***	e-Learning	Pending Approval ⓘ		
<a href="#">Introductory Course</a> ↗	*** General Employee Training	Blended Learning	Completed		
<a href="#">Computers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

Values for the columns are taken from REM course offerings:

- Name – displays Course Offering name. Clicking the Course Offering name opens the Registration details or Course details page (for Registrations with Enrollment Canceled status) in a pop-up window; Clicking the 'Go to Course' (↗) icon next to the Course Offering name opens corresponding LMS course site in a new browser tab. It is displayed in the All tab only for Registrations to e-Learning Content and Blended Learning Courses with Enrolled and Completed status;
- Callout menu (\*\*\* ) – contains Course Information and "Enroll", "Cancel registration", "Go to Course Site", "Show Progress", "Show Score" or "Show Certificate" links depending on the Registration status. "Enroll" link is available only if user has single inactive registration (Expired, Completed, or Canceled) without having other active (Enrolled, Waitlisted, Pending Approval) registrations. For such registrations only 'Enroll' link is displayed in the callout menu:



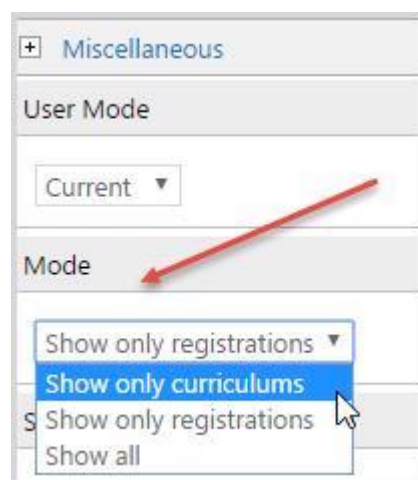
For Registrations with 'Waiting for Start Date' status only "Cancel Registration" link is available:



- Category – displays the category of the course from REM Course Offering;
- Course Type – displays the type of the course from REM Course Offering;
- Status – displays user's status in the Course Offering taken from REM with information indicators next to statuses with comments. Hover over the (i) sign to view additional information on the registration status:

Category	Course Type	Status
Your registration is currently pending manual action from the LMS Administrator		Pending Approval ⓘ

By default, all items from user’s Registrations to courses and Curriculums with ‘Not Started’ status are displayed in All tab (you can select registrations with what status to display in the [Web Part settings](#)). To display only information about Registrations to Courses, change the display mode in Miscellaneous section of the web part settings:



### 5.1.4 View My Competencies

The list of user’s competencies is shown here. The view is the same as in CCM, but without a selection box:


### My Competencies

Held	Required	Revoked	All	Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
<b>Foreign Language Competencies</b>											
				English-Spoken	1 2 3 4 5	4	4 (Starcups Store Manager)	0	4/7/2016	View Entries...	
<b>Group 1</b>											
				Business Conduct	1 2 3 4 5	3	4	0	4/11/2016	View Entries...	
<b>Technical Competencies</b>											
				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...	

Held competencies is the default view.


Fill GAP link allows granting the competency manually (for managers only) or enrolling employee into corresponding REM course (for managers and employees). Select option and click Next:

#### Choose how to fill GAP ✕



**Grant Competency Manually**

Use this option to grant the competency.



**Enroll into a Course**

Select a course that provides the needed competency and enroll.

If you select to Enroll into a Course, the system will show a list of courses that provide the needed Competency level (e.g. if user needs to have competency level 4 and has competency level 2, he will see all courses that provide competency level from 3 to 5):

#### Select a course that provides the needed competency ✕

Course Title	Description	Competencies	Site
<a href="#">New Course</a>	short description text	English - Spoken-Above Average	REM <span style="float: right;">➔</span>

**NOTE:** If course that provides the needed competency level is locked by Curriculum prerequisites or by Course prerequisites inside the curriculum to which learner is assigned, you will see locked icon next to it and its title will not be clickable.

Click the Course Title link to view Course Details page in modal window where you can view more information about the course:

New Course
✖

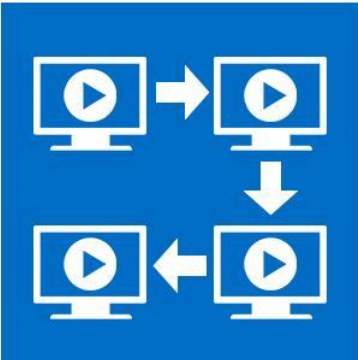
---

**COURSE DESCRIPTION**  
detailed description text

---

**EVENT DETAILS**

Location	Room	Starts	Ends	Availability	Show Interest	Action
		3/17/2016 12:00 AM	3/21/2016 12:00 AM	Places Available	Show Interest	Enroll
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

Training Points: 42

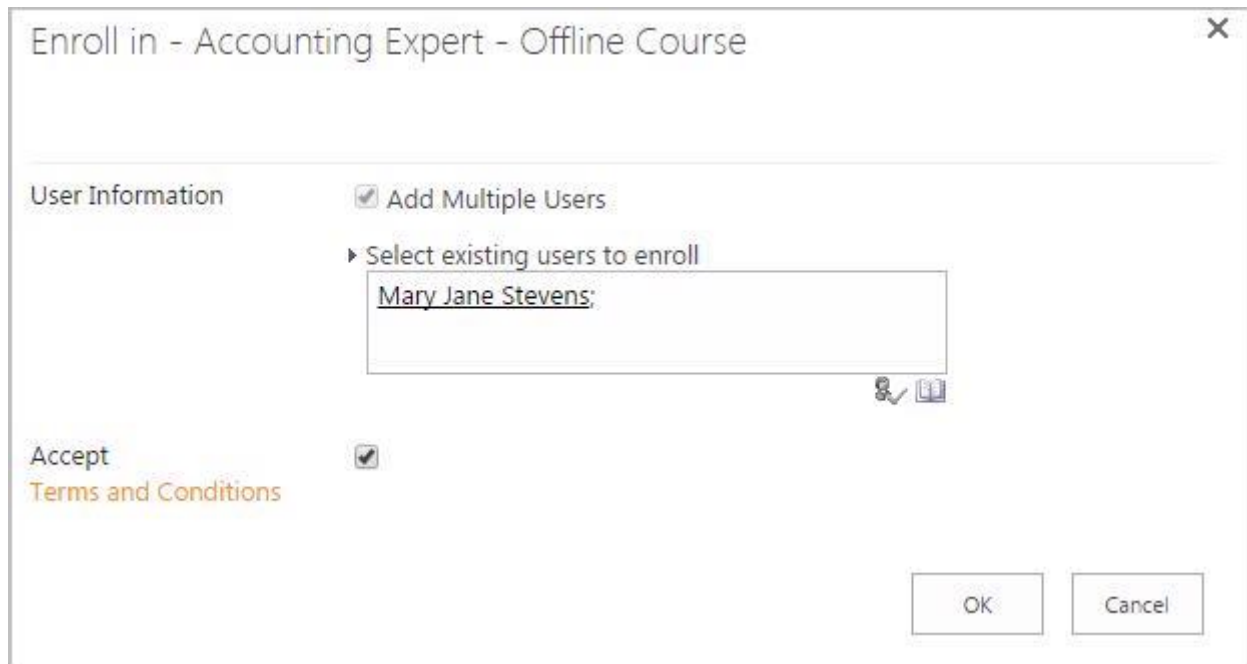
Competencies: English - Spoken-Above Average, English Language-Above Average

After you close the modal window, you can proceed with enrollment. Select the needed course and select Course Offering for enrollment (if several are available):

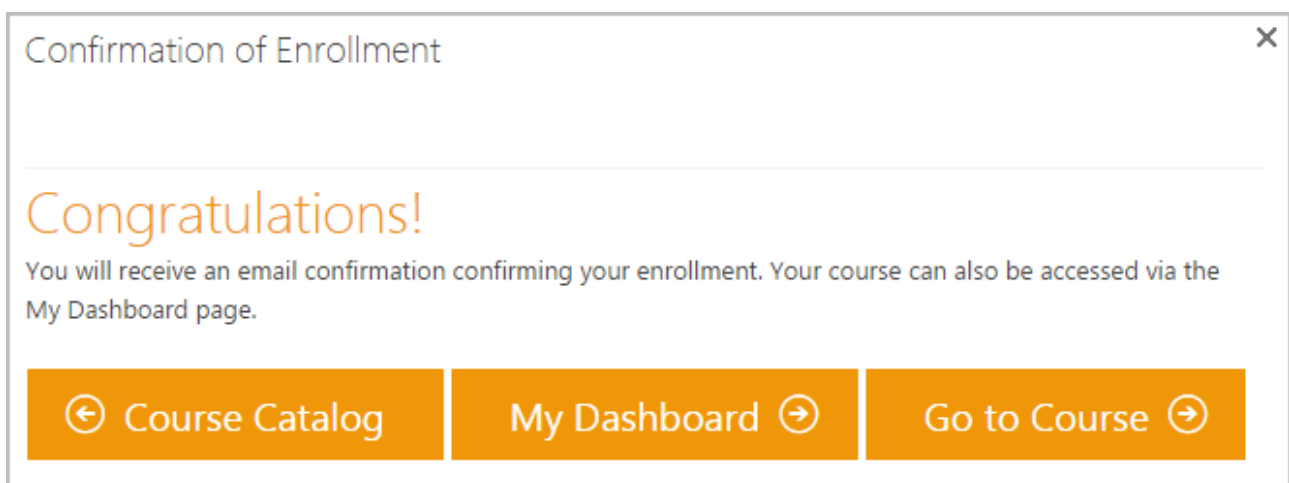
Select the Course Offering you like to enroll into...
✖

Location	Starts	Ends	Time Zone	Teachers	Availability
	3/17/2016 12:00 AM	3/21/2016 12:00 AM		Anna Annaaaaa	Places Available
New York, NY, 51st Street W	3/17/2016 12:00 AM	3/23/2016 12:00 AM		Anna Annaaaaa	Places Available

An enrollment form will be opened:

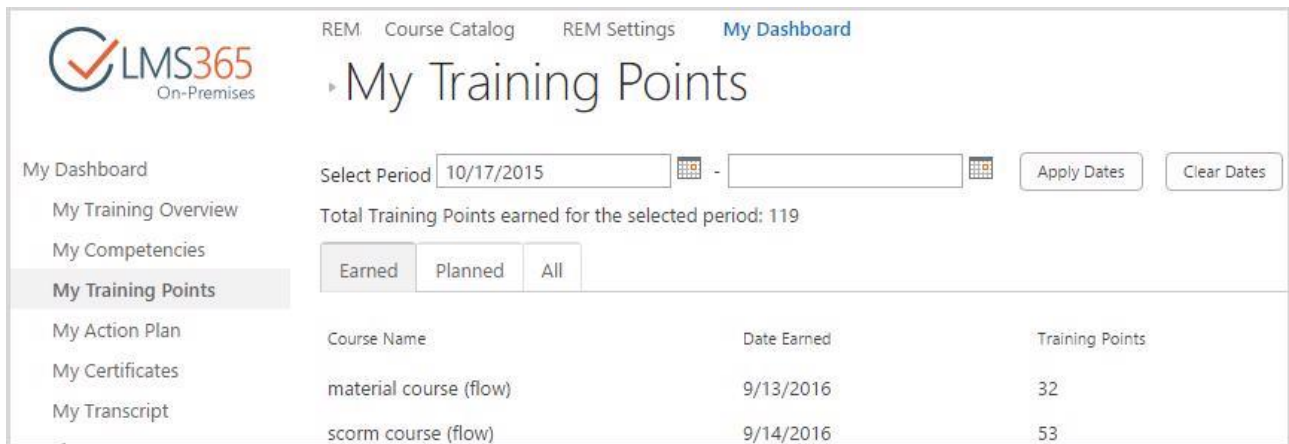


Click OK button to enroll the user to course or Cancel button to discard the process. An Enrollment Confirmation message with 'Course Catalog', 'Go to Course' and 'My Dashboard' buttons will be displayed to confirm successful enrollment:



### 5.1.5 View My Training Points

The list of user's Training Points is shown on this page. Information is taken from REM. 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:



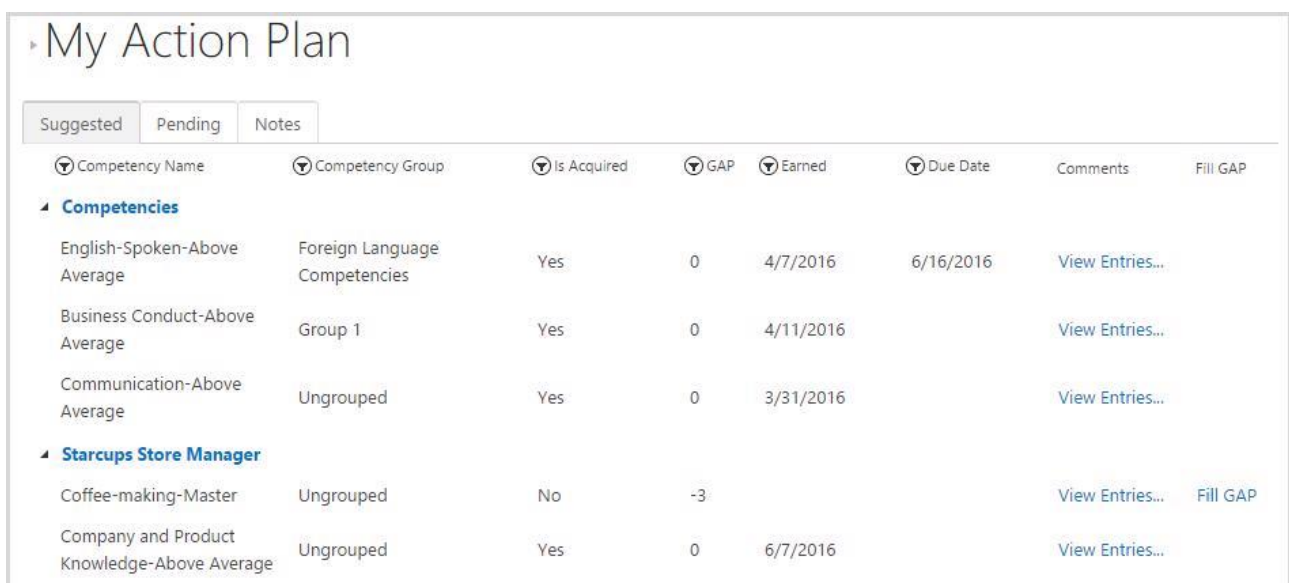
Course Name	Date Earned	Training Points
material course (flow)	9/13/2016	32
scorm course (flow)	9/14/2016	53

Use the Select Period field to search Training Points by period.

### 5.1.6 View My Action Plan

The list of user's competencies grouped by roles is shown here. The view is the same as Action Plan in CCM. You can switch between Suggested and Pending competencies views and see Notes to your Action Plan.

Suggested tab shows competencies that are suggested to user via Action Plan and:



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

**NOTE:** Gap is calculated as the difference between held competency level and suggested competency level.

Pending tab shows competencies that are being acquired via REM Courses:



My Action Plan

Suggested Pending Notes

Competency Name	Competency Group	Is Acquired	Assigned	Due Date	Comments
Accounting-Above Average	All	No	7/29/2016	8/10/2016	<a href="#">View Entries...</a>

Notes tab contains text field for notes about employee’s action plan. Manager can add his comments and save changes to them. For employees this field is read-only:

My Action Plan

Suggested Pending Notes

Highly promising employee, hope she will grow fast.

Last modified by ageucheva\_a at 4/5/2016 11:23 AM [Save](#)

### 5.1.7 View My Certificates

All Certificates from LMS, and REM are shown here. 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

### 5.1.8 View My E-portfolio


Once you click this menu item, your E-portfolio is opened in a new tab.

**NOTE:** If E-portfolio is not installed, the link is not displayed.

### 5.1.9 View My Transcript

**NOTE:** My Transcript functionality is available only when Reporting Center is configured for your Dashboard site.

My Transcript link appears in the Quick launch menu after activation of ELEARNINGFORCE – Dashboard: Report Center Integration feature in Settings > Site Settings > Site Actions > Manage site features:

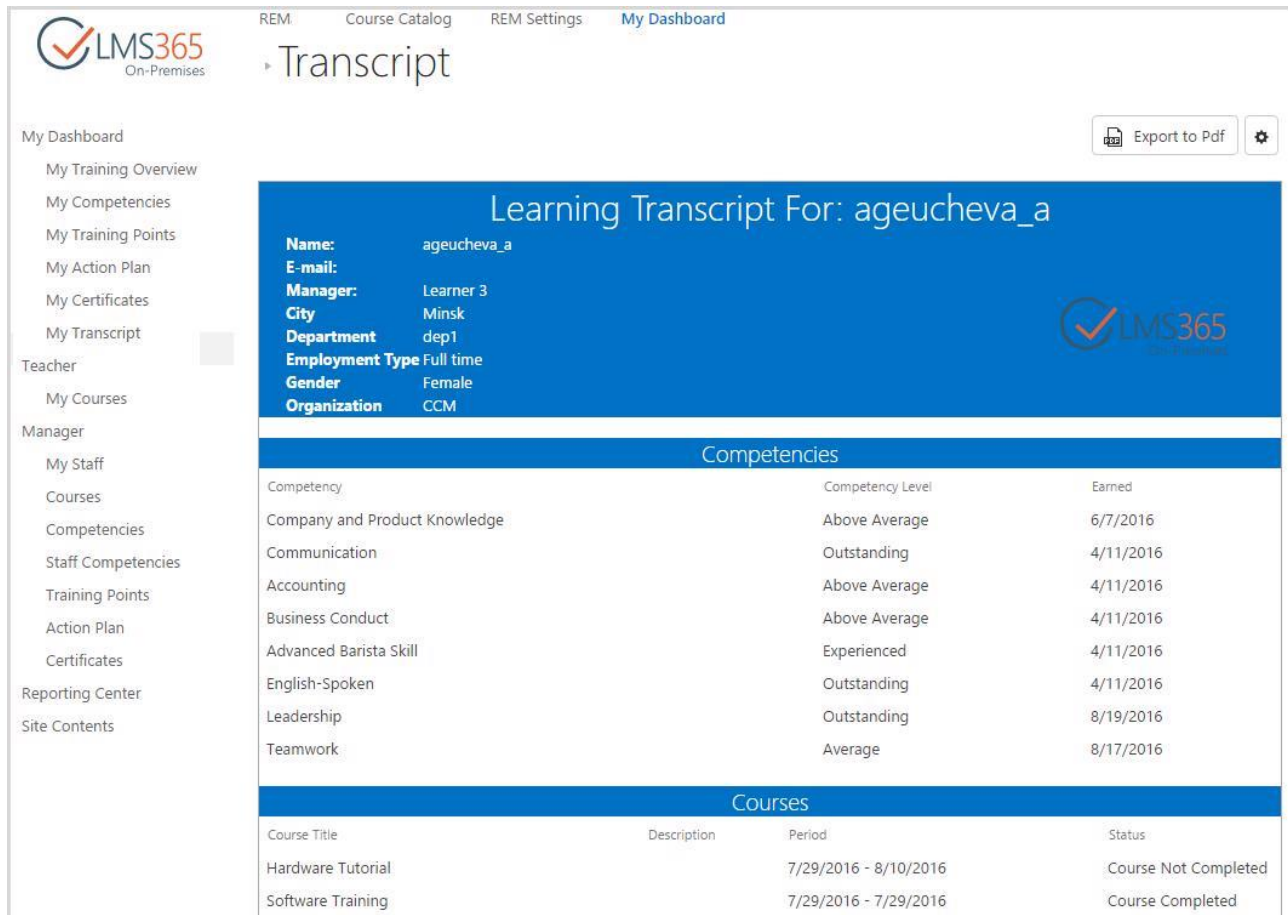


**ELEARNINGFORCE – Dashboard: Report Center Integration**

Adds web part and menu items to quick launch.

Activate

My Transcript displays a report from the Reporting Center “Transcript for selected learner” 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):



**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

It is possible to add information from user’s CCM profile to the generated Transcript. To do this, click settings button next to Export to Excel button.

In the open form you can select which information to show/hide (Display column), change title of any field (Column Name column), set order of fields (Position from Left column), group information by necessary properties (select from the drop-down), and add any column from CCM Personal Profile (UserProfile category). User category is managed by the system:

### Grid Settings ✕

Display	Column Name	Field	Position from Left
<input checked="" type="checkbox"/>	<input type="text" value="Name:"/>	User => Title	1 ▼
<input checked="" type="checkbox"/>	<input type="text" value="E-mail:"/>	User => EMail	2 ▼
<input checked="" type="checkbox"/>	<input type="text" value="Manager:"/>	User Profile => Manager	3 ▼
<input checked="" type="checkbox"/>	<input type="text" value="City"/>	User Profile => City	4 ▼
<input checked="" type="checkbox"/>	<input type="text" value="Employment Type"/>	User Profile => Employment Type	5 ▼
<input checked="" type="checkbox"/>	<input type="text" value="Status"/>	User Profile => Status	6 ▼
<input checked="" type="checkbox"/>	<input type="text" value="Gender"/>	User Profile => Gender	7 ▼
<input checked="" type="checkbox"/>	<input type="text" value="Department"/>	User Profile => Department	8 ▼

User

User Profile

---

First group by the column

Then group by the column

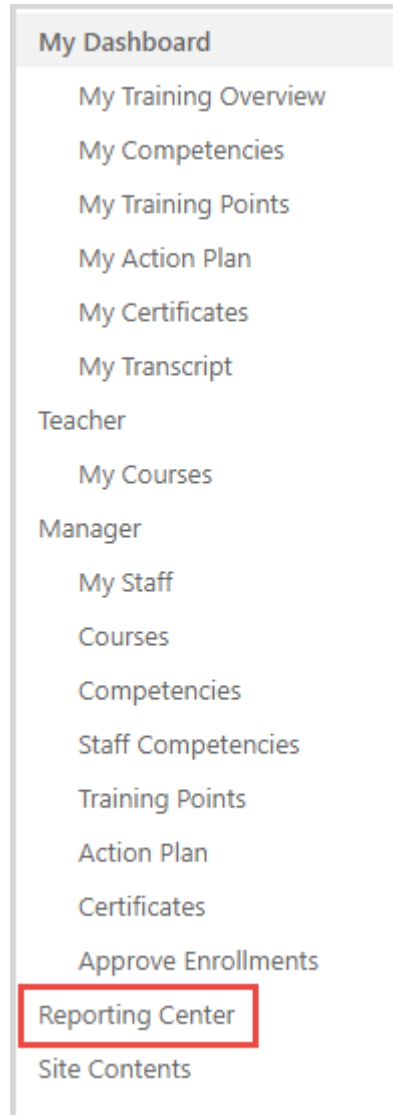
Click OK button to apply the changes or Cancel button to discard them.

To download a PDF version of the transcript to your computer, click the link above the table.

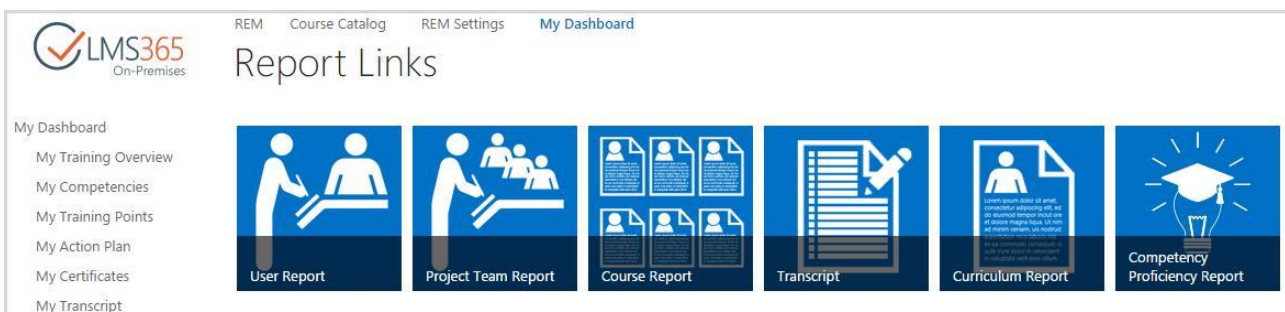
**NOTE:** Grid Settings are not available for Learner in My Transcript section.

### 5.1.10 Reporting Center

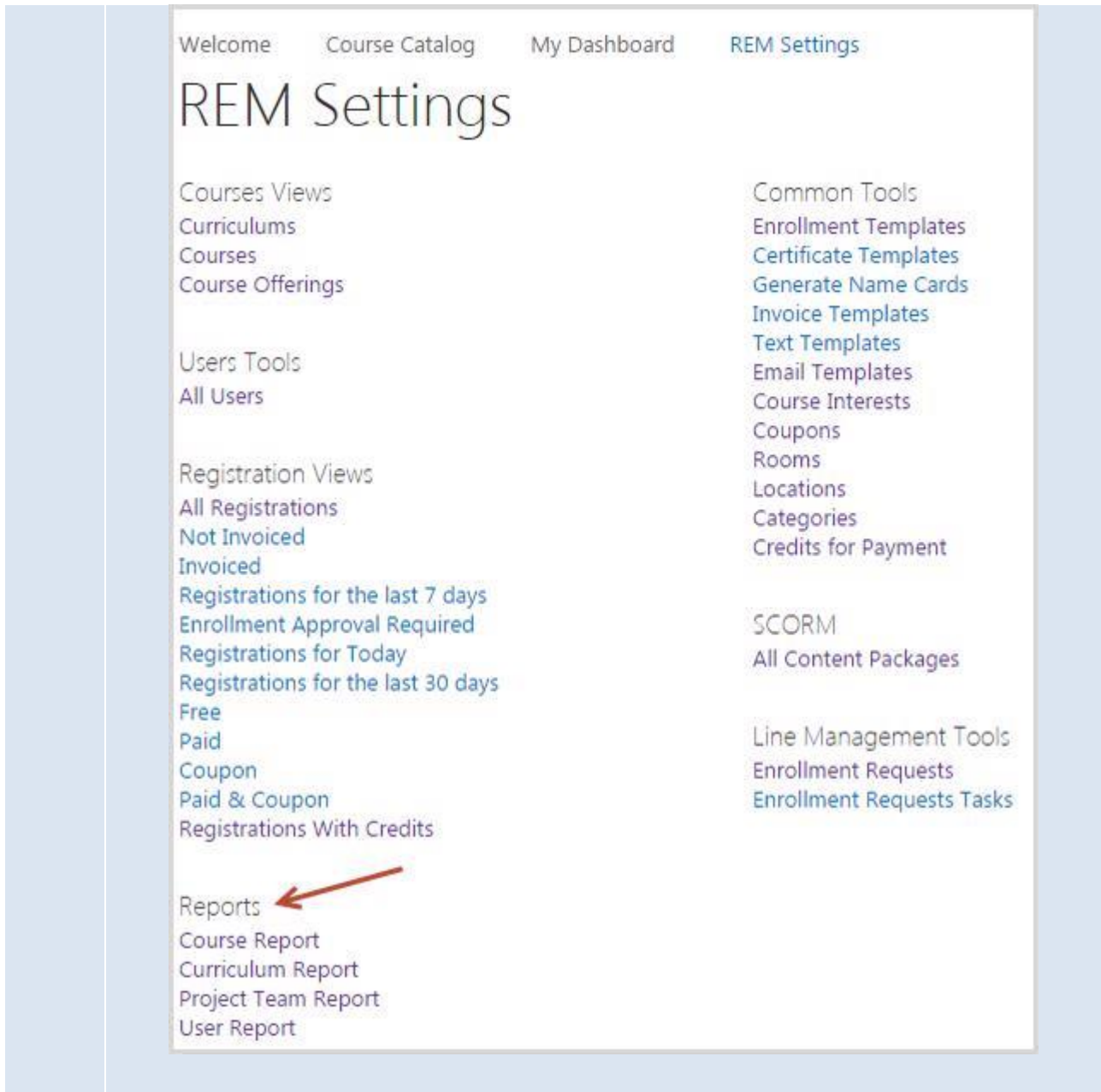
To go to the Reporting Center, click Reporting Center link on the left navigation menu of the dashboard site:



By default, you will be directed to a page with tiles leading to web based reports of the Reporting Center:



**NOTE:** You can also find these reports from REM Settings page:



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

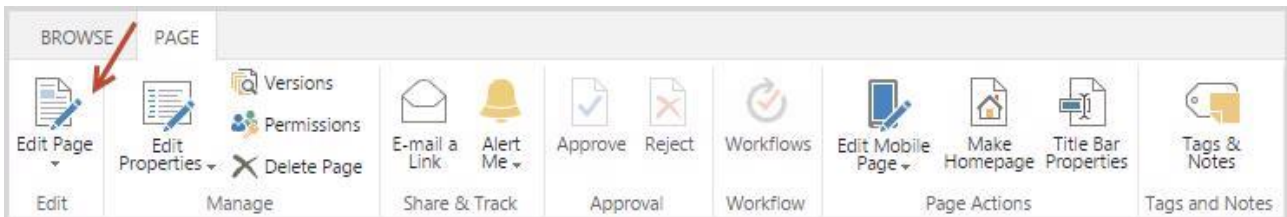
Role	Report type
<b>Site collection administrator</b>	<ul style="list-style-type: none"> <li>• User Report (can see himself, his subordinates);</li> <li>• Curriculum Report (can see himself, his subordinates);</li> <li>• Transcript (can see himself, his subordinates);</li> <li>• Project Team Report (can see all Project Teams if he administers CCM host site);</li> </ul>

	<ul style="list-style-type: none"> <li>• Course Report (can see all users who have CCM Profiles and filter by all courses);</li> <li>• Competency Proficiency Report (can see himself, his subordinates).</li> </ul>
<b>LMS Administrator</b>	<ul style="list-style-type: none"> <li>• User Report (can see himself, his subordinates);</li> <li>• Curriculum Report (can see himself, his subordinates);</li> <li>• Transcript (can see himself, his subordinates);</li> <li>• 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);</li> <li>• Course Report link is available in REM Settings (can see all users who have CCM Profiles and filter by all courses);</li> <li>• Competency Proficiency Report (can see himself, his subordinates).</li> </ul>
<b>Manager (Line Manager; HR Responsible; Manager from Relationships)</b>	<ul style="list-style-type: none"> <li>• User Report (can see himself, his subordinates);</li> <li>• Curriculum Report (can see himself, his subordinates);</li> <li>• Transcript (can see himself, his subordinates);</li> <li>• 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);</li> <li>• Competency Proficiency Report (can see himself, his subordinates).</li> </ul>
<b>Teacher</b>	<p>Sees Reports links after redirecting from DB's Teacher area using Offering Report link:</p> <ul style="list-style-type: none"> <li>• User Report (can see himself and his subordinates if has any);</li> <li>• Curriculum Report (can see himself and his subordinates if has any);</li> <li>• Transcript (can see himself and his subordinates if has any);</li> <li>• Competency Proficiency Report (can see himself and his subordinates if has any).</li> </ul>
<b>Learner</b>	<p>Can see information about himself using direct links in:</p> <ul style="list-style-type: none"> <li>• User Report;</li> </ul>

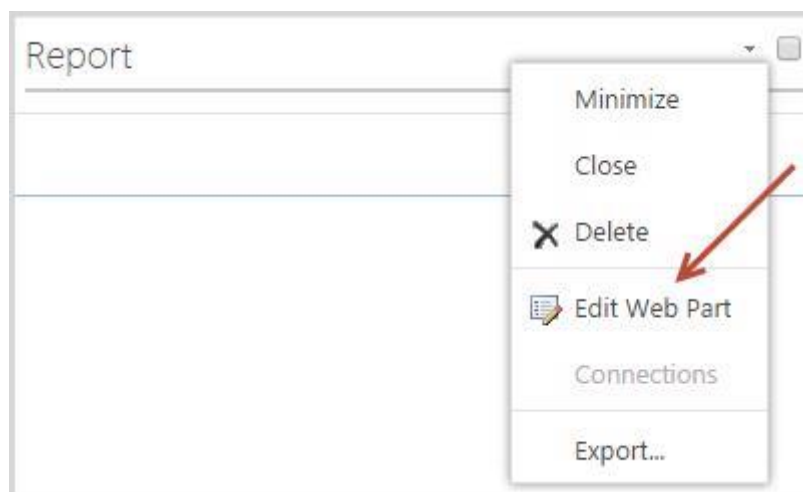
- Curriculum Report;
- Transcript;
- Competency Proficiency Report.

By default, users with active/incomplete CCM profiles are shown in web reports. To show users with deactivated profiles, check 'Show deactivated users' option in the web parts properties:

1. Choose the necessary type of report and click Edit Page button on the ribbon:

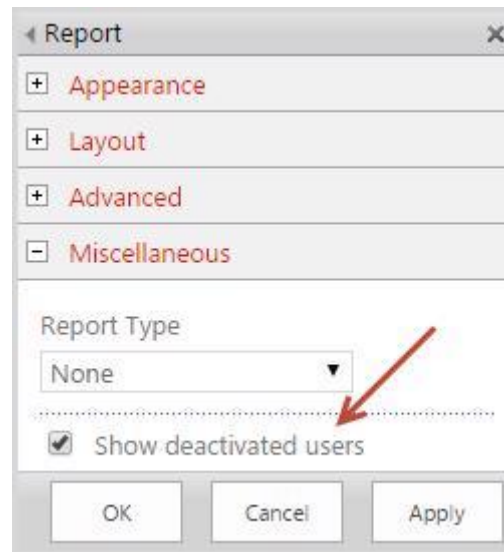


2. Choose Report web part and click Edit Web Part:



3. Expand category Miscellaneous and check the 'Show deactivated users' option:



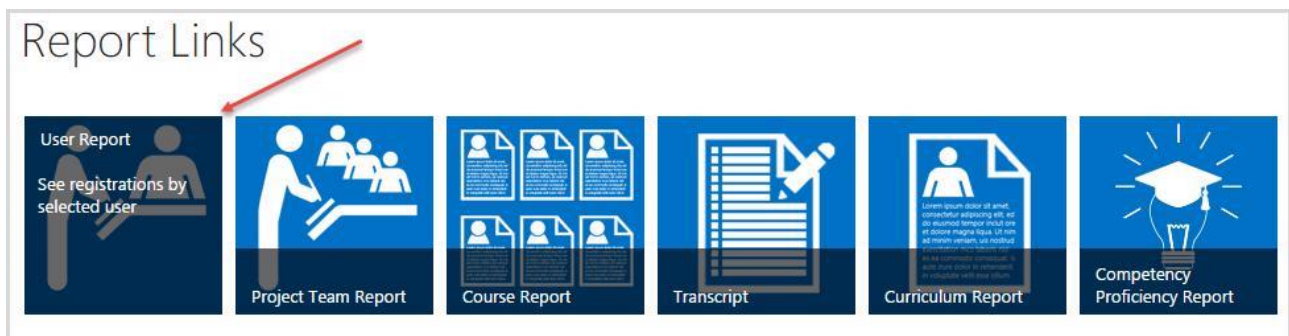


4. Click Apply button to save the changes or Cancel button to discard them.

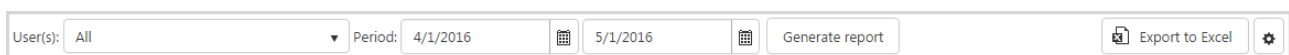
Users with active/incomplete/deactivated CCM profiles will now be displayed in the chosen type of report.

#### 5.1.10.1 User Report

To create a User Report, click User Report tile:



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

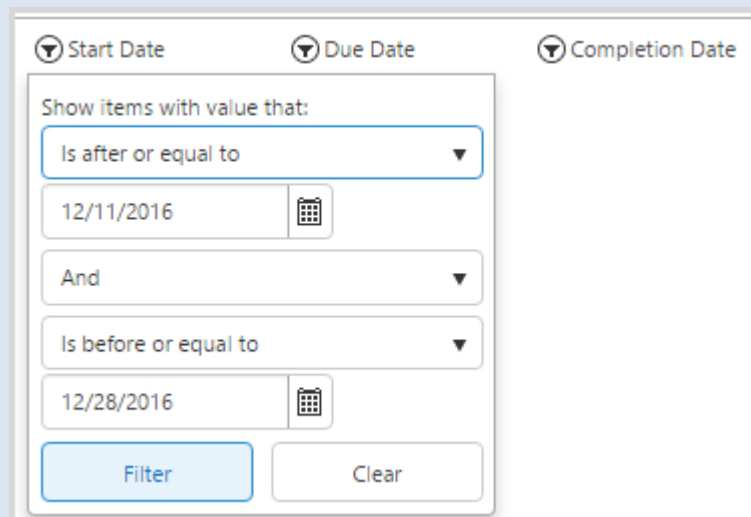


- *User(s)* – select users to include in the report;

**NOTE:** If 'All' option is selected, the information is grouped by user and can be collapsed by clicking on username. All filters change order of items inside information block about one user, but the order of users is not changed.

- *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 becomes '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:

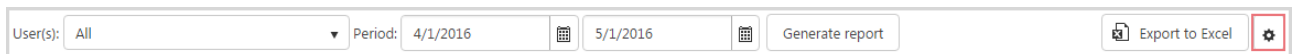
Course Title	ID	Course Type	Status	Start Date	Due Date	Completion Date	Certificate	Certificate Expiration Date	Training Points	Score	Total Training Points
<b>ageucheva_a</b>											
Computers and Technology Course	R-17	Blended Learning	Enrolled	4/4/2016			<input type="checkbox"/>		40		
Computers and Technology Course	R-9	Blended Learning	Canceled	4/4/2016			<input type="checkbox"/>		40		
Hardware Course	R-3	e-Learning Course Site	Course Completed	3/31/2016	6/15/2016	4/11/2016	<input checked="" type="checkbox"/>		40	98	240
Software Course (new)	R-4	e-Learning Course Site	Enrolled	3/31/2016			<input type="checkbox"/>		40		
Introductory Course	R-18	Blended Learning	Course Completed	3/31/2016		4/11/2016	<input checked="" type="checkbox"/>		30		
Hardware Course	R-31	Classroom Training	Course Completed	4/10/2016		4/11/2016	<input checked="" type="checkbox"/>		45		
Software Course	R-32	Classroom Training	Enrolled	4/12/2016			<input type="checkbox"/>		30		
Software Course	R-32	Classroom Training	Enrolled	4/12/2016			<input type="checkbox"/>		30		
Computers and Technology Course	R-33	Classroom Training	Course Not Completed	4/12/2016	5/12/2016		<input type="checkbox"/>		40		
Barista Starcups	R-10	e-Learning Course Site	Course Not Completed	4/1/2016	4/11/2016		<input type="checkbox"/>		40		
<b>Assistant 3</b>											
Introductory Course	R-28	Blended Learning	Certificate Expired	3/31/2016		4/8/2016	<input checked="" type="checkbox"/>		30		
Introductory Course	R-30	Blended Learning	Certificate Expired	3/31/2016		4/8/2016	<input checked="" type="checkbox"/>		30		
Computers and Technology Course	R-29	Blended Learning	Enrolled	4/4/2016			<input type="checkbox"/>		40		
Software Course (new)	R-27	e-Learning Course Site	Enrolled	3/31/2016			<input type="checkbox"/>		40		

- *Course Title* – shows the title of the course;
- *ID* – shows user registration ID to course;
- *Course Type* – shows the type of the course;
- *Status* – shows status of user registration to the course;
- *Start Date* – shows registration enrollment date (when user enrolls after course offering start date has come) or Course Offering Access Start Date (when user enrolls before course offering start date has come) or registration creation date (when there is no 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 date of course completion (for completed registrations);
- *Certificate* – shows a mark next to courses for which user received a certificate;
- *Certificate Expiration Date* – shows expiration date of the certificate (if certificate expires);
- *Training Points* – shows number of training points assigned to learner for course completion;
- *Score* – shows user's score (in percentage terms) for the course, information is taken from 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' as well as for the registrations with 'Course Not Completed' status.

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

It is possible to change the view of the 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

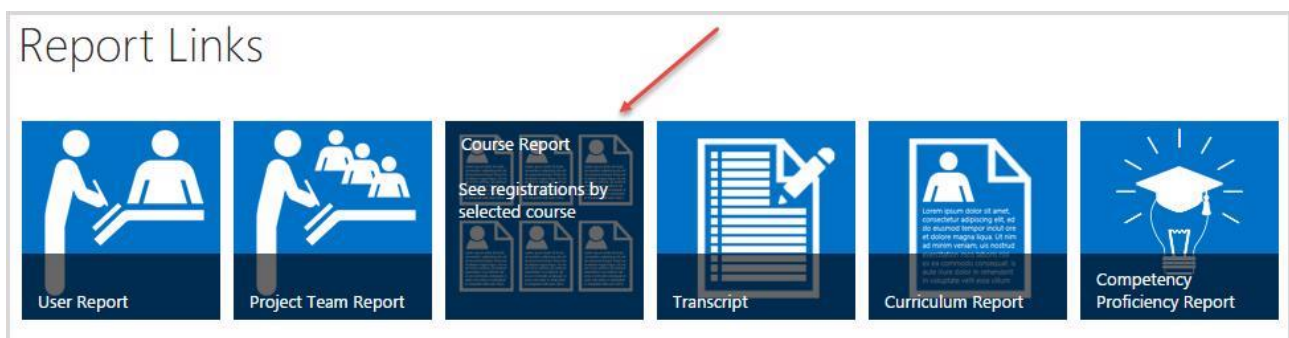
- NOTE:** You can add custom columns to specified lists (via List Settings on lists pages), and then check them in Grid Settings to add to the report.
- NOTE:** The following types of columns are supported: string, number, and date.  
Click OK button to apply the changes or Cancel button to discard them.
- 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.  
The information will be presented in the following form:

Course Title	ID	Course Type	Status	Start Date
<b>ageucheva_a</b>				
Computers and Technology Course	R-17	Blended Learning	Enrolled	04.04.2016
Computers and Technology Course	R-9	Blended Learning	Canceled	04.04.2016
Hardware Course	R-3	e-Learning Course Site	Course Completed	31.03.2016
Software Course (new)	R-4	e-Learning Course Site	Enrolled	31.03.2016
Introductory Course	R-18	Blended Learning	Course Completed	31.03.2016
Hardware Course	R-31	Classroom Training	Course Completed	10.04.2016
Software Course	R-32	Classroom Training	Enrolled	12.04.2016
Software Course	R-32	Classroom Training	Enrolled	12.04.2016
Computers and Technology Course	R-33	Classroom Training	Course Not Completed	12.04.2016
Barista Starcups	R-10	e-Learning Course Site	Course Not Completed	01.04.2016
<b>Assistant 3</b>				
Introductory Course	R-28	Blended Learning	Certificate Expired	31.03.2016
Introductory Course	R-30	Blended Learning	Certificate Expired	31.03.2016
Computers and Technology Course	R-29	Blended Learning	Enrolled	04.04.2016
Software Course (new)	R-27	e-Learning Course Site	Enrolled	31.03.2016
Computers and Technology Course	R-34	Classroom Training	Course Completed	12.04.2016
Computers and Technology Course	R-34	Classroom Training	Course Completed	12.04.2016
Hardware Course	R-35	Classroom Training	Course Completed	10.04.2016
<b>Learner 10.</b>				
Introductory Course	R-16	Blended Learning	Enrolled	31.03.2016
Introductory Course	R-15	Blended Learning	Canceled	31.03.2016

### 5.1.10.2 Course Report

To create a Course Report, click Course Report tile:



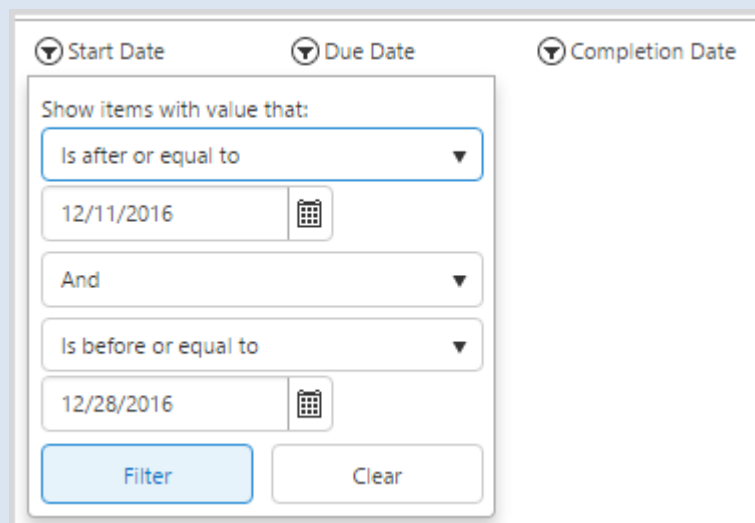
On the opened Reports page, use filters to customize information that will be included in your Report:

Course(s): All    Period: 4/18/2016    4/25/2016    Generate report    Export to Excel

- *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);

- *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	Training Points	Score	Total Time
Course(s): All    Period: 3/31/2016    4/27/2016    Generate report    Export to Excel											
<b>ageucheva_a</b>											
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"/>				
<b>Assistant 3</b>											
<b>Learner 10.</b>											
<b>Learner 2</b>											
<b>Learner 3</b>											
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 (when user enrolls after course offering start date has come) or Course Offering Access Start Date (when user enrolls before course offering start date has come) or registration creation date (when there is no 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 assigned for the course;
- *Score* – shows user's score (in percentage terms) for the course, information is taken from 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' as well as for the registrations with 'Course Not Completed' status.

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

**NOTE:** Information in the report is grouped by user and can be collapsed by clicking on username. All filters change order of items inside information block about one user, but the order of users is not changed.

It is possible to change the view of the 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

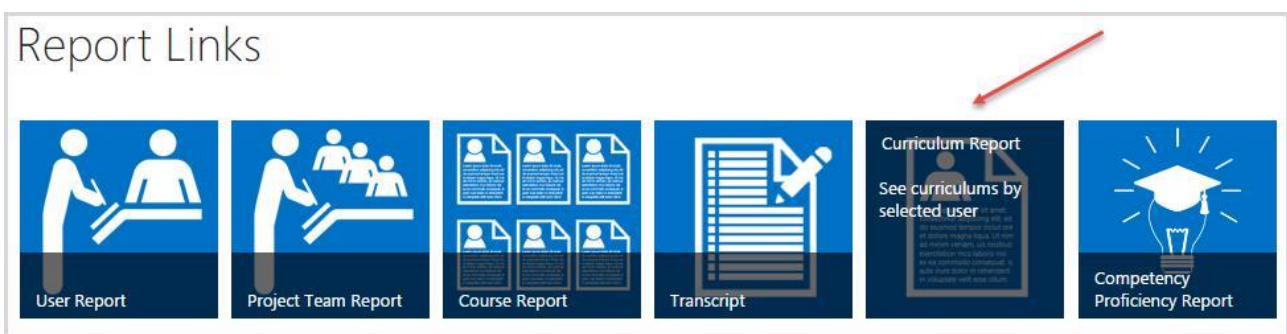
- NOTE:** You can add custom columns to specified lists (via List Settings on lists pages), and then check them in Grid Settings to add to the report.
- NOTE:** The following types of columns are supported: string, number, and date.  
Click OK button to apply the changes or Cancel button to discard them.
- 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.  
The information will be presented in the following form:

Course Title	ID	Course Type	Status	Start Date
<b>ageucheva_a</b>				
Barista Starcups	R-10	e-Learning Course Site	Course Not Completed	01.04.2016
Software Course	R-32	Classroom Training	Enrolled	12.04.2016
Computers and Technology Course	R-17	Blended Learning	Enrolled	04.04.2016
Computers and Technology Course	R-9	Blended Learning	Canceled	04.04.2016
Introductory Course	R-2	Blended Learning	Canceled	31.03.2016
Introductory Course	R-18	Blended Learning	Course Completed	31.03.2016
Software Course (new)	R-4	e-Learning Course Site	Enrolled	31.03.2016
Hardware Course	R-3	e-Learning Course Site	Course Completed	31.03.2016
Computers and Technology Course	R-33	Classroom Training	Enrolled	12.04.2016
Hardware Course	R-31	Classroom Training	Course Completed	10.04.2016
Software Course	R-32	Classroom Training	Enrolled	12.04.2016
<b>Assistant 3</b>				
Introductory Course	R-30	Blended Learning	Certificate Expired	31.03.2016
Computers and Technology Course	R-34	Classroom Training	Course Completed	12.04.2016
Introductory Course	R-28	Blended Learning	Certificate Expired	31.03.2016
Software Course (new)	R-27	e-Learning Course Site	Enrolled	31.03.2016
Hardware Course	R-35	Classroom Training	Course Completed	10.04.2016
Computers and Technology Course	R-29	Blended Learning	Enrolled	04.04.2016
Computers and Technology Course	R-34	Classroom Training	Course Completed	12.04.2016

### 5.1.10.3 Curriculum Report

To create a Curriculum Report, click Curriculum Report tile:



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

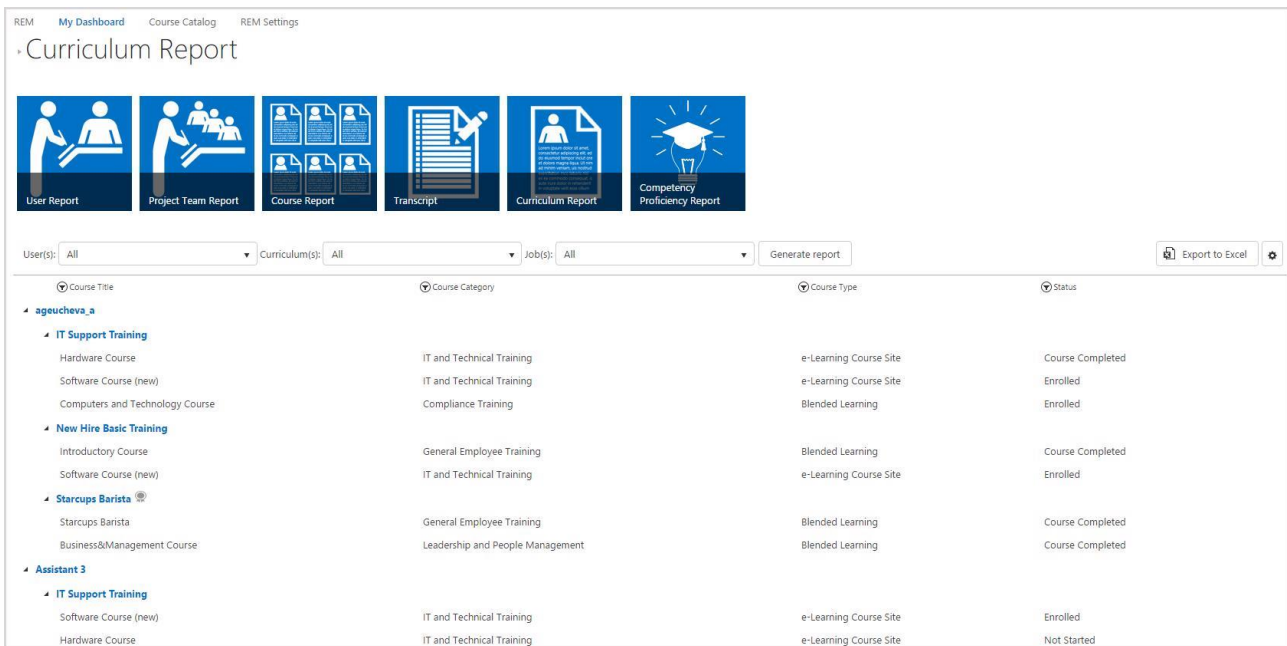
User(s):  Curriculum(s):  Job(s):

- *User(s)* – a drop-down list with subordinates from CCM (those who have the user assigned as manager in the profile field 'Manager' or in Relationships section);
- *Curriculum(s)* – drop-down with a list of all curriculums (several or all curriculums can be selected);
- *Job(s)* – drop-down with a list of all jobs (several or all jobs can be selected).

**NOTE:** All existing jobs and curriculums are shown in drop-downs. When you select a user, items are filtered in the following way:

- curriculums that are assigned to user are checked by default;
- jobs that are related to curriculums are checked by default.


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

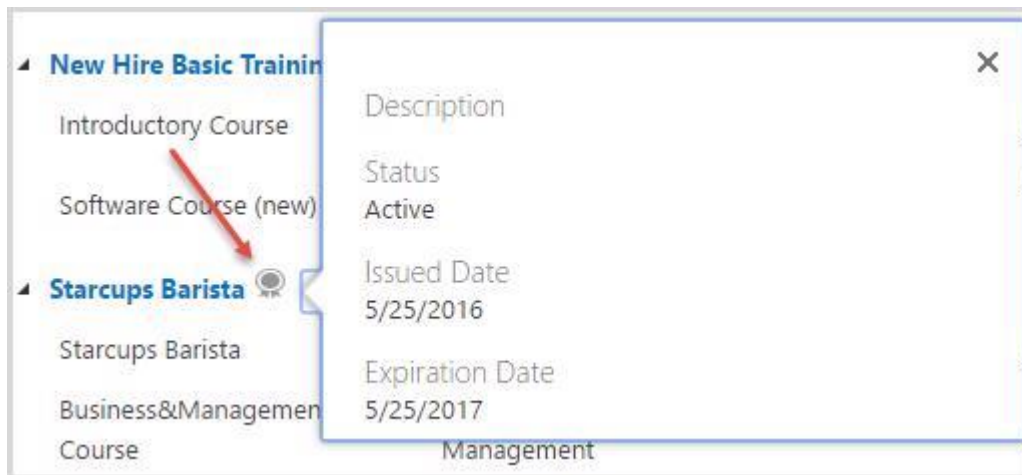


Course Title	Course Category	Course Type	Status
<b>ageucheva_a</b>			
<b>IT Support Training</b>			
Hardware Course	IT and Technical Training	e-Learning Course Site	Course Completed
Software Course (new)	IT and Technical Training	e-Learning Course Site	Enrolled
Computers and Technology Course	Compliance Training	Blended Learning	Enrolled
<b>New Hire Basic Training</b>			
Introductory Course	General Employee Training	Blended Learning	Course Completed
Software Course (new)	IT and Technical Training	e-Learning Course Site	Enrolled
<b>Starcup Barista</b>			
Starcup Barista	General Employee Training	Blended Learning	Course Completed
Business&Management Course	Leadership and People Management	Blended Learning	Course Completed
<b>Assistant 3</b>			
<b>IT Support Training</b>			
Software Course (new)	IT and Technical Training	e-Learning Course Site	Enrolled
Hardware Course	IT and Technical Training	e-Learning Course Site	Not Started

- *Course Title*– contains course name;
- *Course Category* – shows category of the course;
- *Course Type* – contains type of the course;
- *Status* – contains status of user registration to the course.

**NOTE:** Information in the report is grouped by user and then by curriculum and can be collapsed by clicking on username or curriculum title. All filters change order of items inside information block about one user/one curriculum, but the order of users and curriculums is not changed.

Curriculum with the issued certificate has Certificate icon  next to its name. Click on this icon to open callout menu. Information about Curriculum Certificate status (Active/Expired), Curriculum Certificate Issued Date, and Curriculum Certificate Expiration Date will appear:



**NOTE:** Certificate icon appears only for curriculums with 'Completed' status.

It is possible to change the view of the 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, User, and Curriculum categories) are managed by the system:

### Grid Settings X

Display	Column Name	Field	Position from Left
<input checked="" type="checkbox"/>	<input type="text"/>	User => Title	1 ▼
<input checked="" type="checkbox"/>	<input type="text"/>	Curriculum => Title	2 ▼
<input checked="" type="checkbox"/>	Course Title	Course => Title	3 ▼
<input checked="" type="checkbox"/>	Course Category	Course => Course Category	4 ▼
<input checked="" type="checkbox"/>	Course Type	Course => Course Type	5 ▼
<input checked="" type="checkbox"/>	Status	Course registration => Status	6 ▼

- Certificate
- Course
- Course offering
- Course registration
- Curriculum
- User
- UserProfile

---

First group by the column

Then group by the column

- 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.

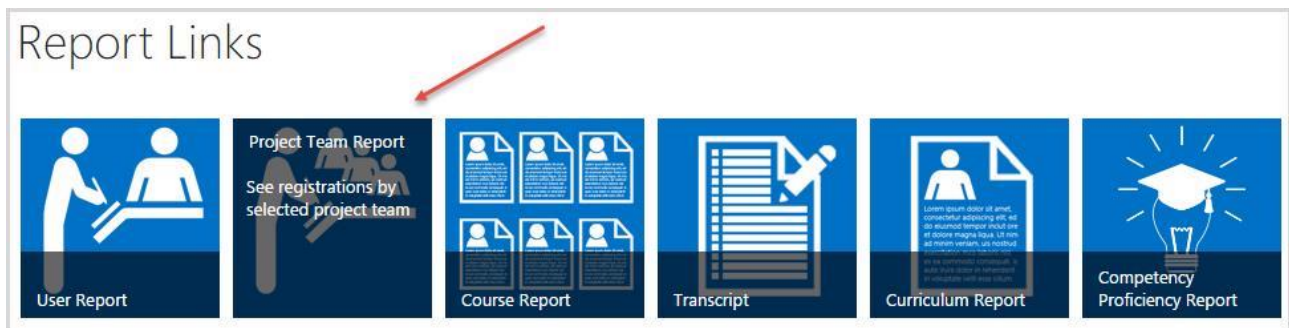
To generate and save the report to your local computer (or to save already generated report), click Export to Excel button.

The information will be presented in the following form:

Course Title	Course Category	Course Type	Status
<b>ageucheva_a</b>			
<b>IT Support Training</b>			
Hardware Course	IT and Technical Training	e-Learning Course Site	Course Completed
Computers and Technology Course	Compliance Training	Blended Learning	Enrolled
Software Course (new)	IT and Technical Training	e-Learning Course Site	Enrolled
<b>New Hire Basic Training</b>			
Software Course (new)	IT and Technical Training	e-Learning Course Site	Enrolled
Introductory Course	General Employee Training	Blended Learning	Course Completed
<b>Assistant 3</b>			
<b>IT Support Training</b>			
Hardware Course	IT and Technical Training	e-Learning Course Site	Not Started
Software Course (new)	IT and Technical Training	e-Learning Course Site	Enrolled
Computers and Technology Course	Compliance Training	Blended Learning	Enrolled
<b>New Hire Basic Training</b>			
Software Course (new)	IT and Technical Training	e-Learning Course Site	Enrolled
Introductory Course	General Employee Training	Blended Learning	Certificate Expired
<b>Learner 1</b>			
<b>New Hire Basic Training</b>			
Software Course (new)	IT and Technical Training	e-Learning Course Site	Not Started
Introductory Course	General Employee Training	Blended Learning	Not Started

#### 5.1.10.4 Project Team Report

To create a Project Team report, click Project Team Report tile:



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

Team(s): All    Period: 4/11/2016    4/25/2016    Generate report    Export to Excel

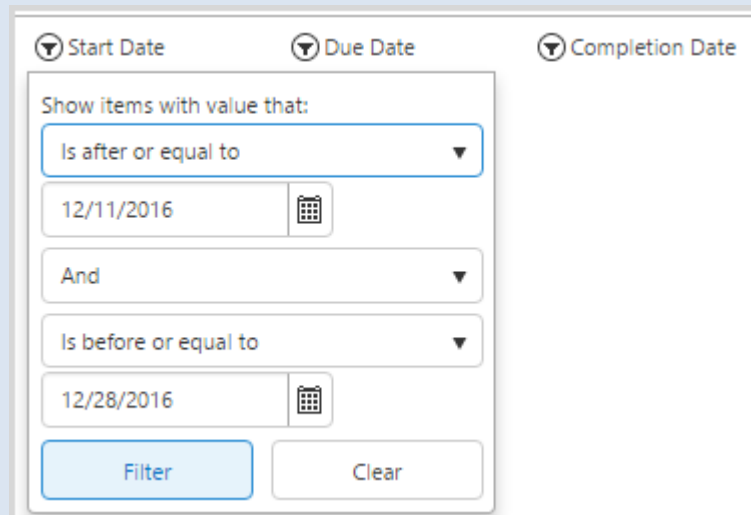
- *Team* – drop-down with a list of teams in which user or his subordinates is team member/team leader;

**NOTE:** Project Team with AD group specified as Team Member can also be viewed in Project Team Report by Team Leader.

- *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	Organization...	Department...	Job(s)	Course Type	Status	Start Date	Due Date	Completion Date	Certificate	Certificate Expiration Dat...	Training Points	Score	Total Time
Team(s): All Period: 3/31/2016 4/27/2016 Generate report Export to Excel														
ageucheva_a														
Learner 1														
Programme Management	R-13	Starcup	Barista	e-Learning Course Site	Wait For Approval	4/4/2016						50		
New Course	R-20	Starcup	Barista	e-Learning Course Site	Wait For Approval	4/7/2016						50		
Business&Management Course	R-36	Starcup	Barista	Blended Learning	Wait For Approval	4/18/2016	5/18/2016					70		
System External Course	R-44	Starcup	Barista	System External Course	Certificate Expired	3/16/2016	4/19/2016			4/21/2016				
System External Course	R-50	Starcup	Barista	System External Course	Course Completed	3/16/2016	4/25/2016			4/30/2016				
Learner 10.														
Introductory Course	R-16	Starcup	Barista	Blended Learning	Enrolled	3/31/2016						30	100	
New Course	R-22	Starcup	Barista	e-Learning Course Site	Wait For Approval	4/7/2016						50		
Introductory Course	R-15	Starcup	Barista	Blended Learning	Canceled	3/31/2016						30	100	

- *Course Title*– shows course name;
- *ID* – shows user registration ID to the course;
- *Organization* – shows user's organization;
- *Department* – shows user's department from CCM profile;
- *Job(s)* – shows user's jobs from CCM profile;
- *Course Type* – shows type of the course;

- *Status* – shows status of user registration to the course;
- *Start Date* – shows registration enrollment date (when user enrolls after course offering start date has come) or Course Offering Access Start Date (when user enrolls before course offering start date has come) or registration creation date (when there is no 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 assigned for the course;
- *Score* – shows user's score (in percentage terms) for the course, information is taken from 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' as well as for the registrations with 'Course Not Completed' status.

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

**NOTE:** Information in the report is grouped by user and can be collapsed by clicking on username. All filters change order of items inside information block about one user, but the order of users is not changed.

It is possible to change the view of the 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"/>	Organization	User Profile => Organization	4 ▼
<input checked="" type="checkbox"/>	Job(s)	User Profile => Job(s)	5 ▼
<input checked="" type="checkbox"/>	Course Type	Course => Course Type	6 ▼
<input checked="" type="checkbox"/>	Status	Course registration => Status	7 ▼
<input checked="" type="checkbox"/>	Start Date	Course registration => Start Date	8 ▼
<input checked="" type="checkbox"/>	Due Date	Course registration => Due Date	9 ▼
<input checked="" type="checkbox"/>	Completion Date	Course registration => Completion Date	10 ▼
<input checked="" type="checkbox"/>	Certificate	Course registration => Certificate	11 ▼
<input checked="" type="checkbox"/>	Certificate Expiration Date	Certificate => Certificate Expiration Date	12 ▼
<input checked="" type="checkbox"/>	Training Points	Course registration => Training Points	13 ▼
<input checked="" type="checkbox"/>	Score	Course registration => Score	14 ▼
<input checked="" type="checkbox"/>	Total Time	Attendance => Total Time	15 ▼

- Attendance
- Certificate
- Course
- Course offering
- Course registration

**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.

The information will be presented in the following form:

Course Title	ID	Organizati	Departm	Job(s)	Course Type	Status
<b>ageucheva_a</b>						
New Course	R-19			Starcups IT Support Manager, Accountant	e-Learning Course Site	Wait For Approval
Computers and Technology Course	R-17			Starcups IT Support Manager, Accountant	Blended Learning	Enrolled
Introductory Course	R-2			Starcups IT Support Manager, Accountant	Blended Learning	Canceled
Computers and Technology Course	R-9			Starcups IT Support Manager, Accountant	Blended Learning	Canceled
Hardware Course	R-3			Starcups IT Support Manager, Accountant	e-Learning Course Site	Course Completed
Software Course (new)	R-4			Starcups IT Support Manager, Accountant	e-Learning Course Site	Enrolled
Introductory Course	R-18			Starcups IT Support Manager, Accountant	Blended Learning	Course Completed
Barista Starcups	R-10			Starcups IT Support Manager, Accountant	e-Learning Course Site	Course Not Completed
Hardware Course	R-31			Starcups IT Support Manager, Accountant	Classroom Training	Course Completed
Software Course	R-32			Starcups IT Support Manager, Accountant	Classroom Training	Enrolled
Software Course	R-32			Starcups IT Support Manager, Accountant	Classroom Training	Enrolled
Computers and Technology Course	R-33			Starcups IT Support Manager, Accountant	Classroom Training	Enrolled
Business&Management Course	R-48			Starcups IT Support Manager, Accountant	Blended Learning	Course Completed
Programme Management	R-11			Starcups IT Support Manager, Accountant	e-Learning Course Site	Canceled
<b>Learner 1</b>						
Programme Management	R-13			Starcups Barista	e-Learning Course Site	Wait For Approval
New Course	R-20			Starcups Barista	e-Learning Course Site	Wait For Approval
Business&Management Course	R-36			Starcups Barista	Blended Learning	Wait For Approval
System External Course	R-44			Starcups Barista		Certificate Expired
System External Course	R-50			Starcups Barista		Course Completed
<b>Learner 10.</b>						
Introductory Course	R-16			Starcups Barista	Blended Learning	Enrolled
New Course	R-22			Starcups Barista	e-Learning Course Site	Wait For Approval
Introductory Course	R-15			Starcups Barista	Blended Learning	Canceled

### 5.1.10.5 Competency Proficiency Report

**NOTE:** To be able to create Competency Proficiency Reports on old REM sites, reactivate 'ELEARNINGFORCE - Reporting Center: Web Reports' feature.

To create Competency Proficiency Report, click Competency Proficiency Report tile:



Competency Proficiency Report has a single filter:

- *User(s)* – a drop-down list with subordinates from CCM (those who have the user assigned as manager in the profile field 'Manager' or in Relationships section).

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

Required	Held	Gap
<b>ageucheva_a</b>		
English-Spoken-Above Average	English-Spoken-Outstanding	0
Company and Product Knowledge-Above Average	Company and Product Knowledge-Above Average	0
Business Conduct-Average	Business Conduct-Above Average	0
English-Spoken-Average	English-Spoken-Outstanding	0
Communication-Above Average	Communication-Outstanding	0
Accounting-Above Average	Accounting-Above Average	0
Coffee-making-Experienced		-2
Communication-Above Average	Communication-Outstanding	0
<b>Assistant 3</b>		
Communication-Above Average		-4
English-Spoken-Above Average		-4
Coffee-making-Experienced		-2

- *Required* – list of competencies with the indication of the required level;
- *Held* – list of competencies with the indication of the held level;
- *Gap* – the difference between the held and suggested levels of Competency.

**NOTE:** Information in the report is grouped by user and can be collapsed by clicking on username. All filters change order of items inside information block about one user, but the order of users is not changed.

It is possible to change the view of the 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) and Competencies list (Competency level and User competency categories)(expand necessary category and select columns to add). Other columns (User category) are managed by the system:

### Grid Settings ✕

Display	Column Name	Field	Position from Left
<input checked="" type="checkbox"/>	<input type="text"/>	User => Title	<input type="text" value="1"/> ▼
<input checked="" type="checkbox"/>	<input type="text" value="Required"/>	Competency level => Title	<input type="text" value="2"/> ▼
<input checked="" type="checkbox"/>	<input type="text" value="Held"/>	User competency => Title	<input type="text" value="3"/> ▼
<input checked="" type="checkbox"/>	<input type="text" value="Gap"/>	Object => Gap	<input type="text" value="4"/> ▼

Competency level  
 User  
 User competency  
 User Profile

---

First group by the column  ▼  
 Then group by the column  ▼

- 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.

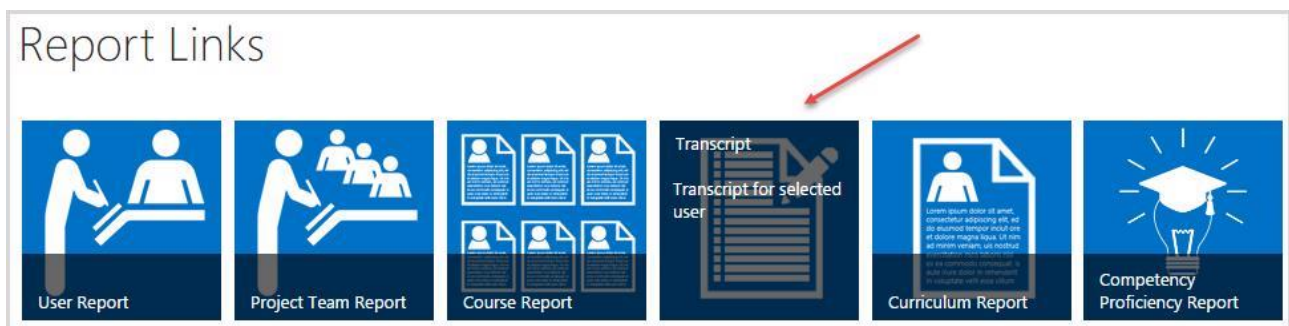
To generate and save the report to your local computer (or to save already generated report), click Export to Excel button..

The information will be presented in the following form:

	A	B	C	D
1	Required		Held	Gap
2	<b>ageucheveva_a</b>			
3	English-Spoken-Above Average		English-Spoken-Outstanding	0
4	Company and Product Knowledge-Above Average		Company and Product Knowledge-Above Average	0
5	Business Conduct-Average		Business Conduct-Above Average	0
6	English-Spoken-Average		English-Spoken-Outstanding	0
7	Communication-Above Average		Communication-Outstanding	0
8	Accounting-Above Average		Accounting-Above Average	0
9	Coffee-making-Experienced			-2
10	Communication-Above Average		Communication-Outstanding	0
11	<b>Assistant 3</b>			
12	Communication-Above Average			-4
13	English-Spoken-Above Average			-4
14	Coffee-making-Experienced			-2

### 5.1.10.6 Transcript

To create a Transcript Report, click Transcript tile:



Transcript has a single filter:

- *User* – a drop-down list with subordinates from CCM (those who have the user assigned as manager in the profile field 'Manager' or in Relationships section). Only one user at a time can be selected.

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

User:

## Learning Transcript For: Learner 3

**Name:** Learner 3  
**E-mail:** a.koshkina@belitsoft.by  
**Manager:** ageucheva\_a  
**City:** London  
**Employment Type:** Full time  
**Status:** Married  
**Gender:** Female  
**Department:** dep1

### Competencies

Competency	Competency Level	Earned
Communication	Above Average	4/21/2016
Living the Values	Above Average	4/26/2016
English-Spoken	Above Average	4/21/2016

### Courses

Course Title	Description	Period	Status
Software Training		7/28/2016 - 7/30/2016	Enrolled
Super Course		8/5/2016	Enrolled
New Course		8/17/2016	Enrolled
Business&Management Course		8/17/2016	Canceled

- *Competencies* – list of user’s competencies with the indication of level and date it was modified;
- *Courses* – list of courses where user has Learner role with description and Start and End dates (Period tab). Start Date displays Registration Enrollment Date. End Date is displayed depending on Registration status. If Registration status is ‘Enrolled’ or ‘Not Completed’, End 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’, End Date displays Registration completion date;
- *Certificates* – list of user’s certificates with their status and dates of issue and expiration;
- *Teams* – list of user’s teams and user’s role in these teams;
- *Training Points* – list of courses for which the user has gained or will gain training points, date when training points were acquired (for completed courses) and the number of points (for each course and total).

It is possible to add information from user’s CCM profile to the generated Transcript. To do this, click settings button next to Export to Excel button:

User:

In the open form you can select which information to show/hide (Display column), change title of any field (Column Name column), set order of fields (Position from Left column), group information

by necessary properties (select from the drop-down), and add any column from CCM Personal Profiles (UserProfile category). User category is managed by the system:

### Grid Settings ✕

Display	Column Name	Field	Position from Left
<input checked="" type="checkbox"/>	<input type="text" value="Name:"/>	User => Title	1 ▼
<input checked="" type="checkbox"/>	<input type="text" value="E-mail:"/>	User => EMail	2 ▼
<input checked="" type="checkbox"/>	<input type="text" value="Manager:"/>	User Profile => Manager	3 ▼
<input checked="" type="checkbox"/>	<input type="text" value="City"/>	User Profile => City	4 ▼
<input checked="" type="checkbox"/>	<input type="text" value="Employment Type"/>	User Profile => Employment Type	5 ▼
<input checked="" type="checkbox"/>	<input type="text" value="Status"/>	User Profile => Status	6 ▼
<input checked="" type="checkbox"/>	<input type="text" value="Gender"/>	User Profile => Gender	7 ▼
<input checked="" type="checkbox"/>	<input type="text" value="Department"/>	User Profile => Department	8 ▼

User  
 User Profile

---

First group by the column   
 Then group by the column

**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.

Generated report can be downloaded to your local computer. To do that, click Export to PDF button. The information will be presented in the following form:

## Learning Transcript For: Learner 3

**Name:** Learner 3  
**E-mail:** a.koshkina@belitsoft.by  
**Manager:** ageucheva\_a  
**City:** London  
**Employment Type:** Full time  
**Status:** Married  
**Gender:** Female  
**Department:** dep1



### Competencies

Competency	Competency Level	Earned
Communication	Above Average	4/21/2016
Living the Values	Above Average	4/26/2016
English-Spoken	Above Average	4/21/2016

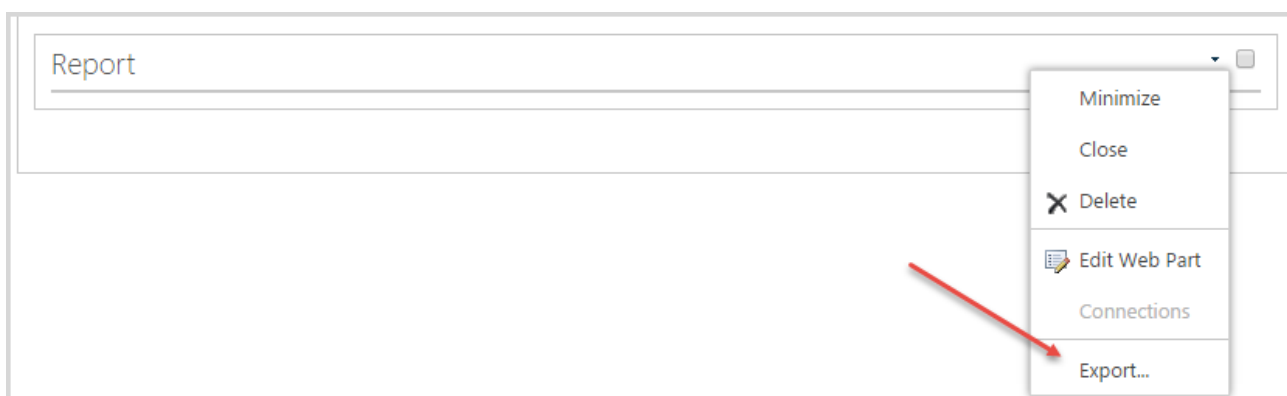
### Courses

Course Title	Description	Period	Status
Software Training		7/28/2016 - 7/30/2016	Enrolled
Super Course		8/5/2016	Enrolled
New Course		8/17/2016	Enrolled
Business&Management Course		8/17/2016	Canceled

#### 5.1.10.7 Adding custom Web Report

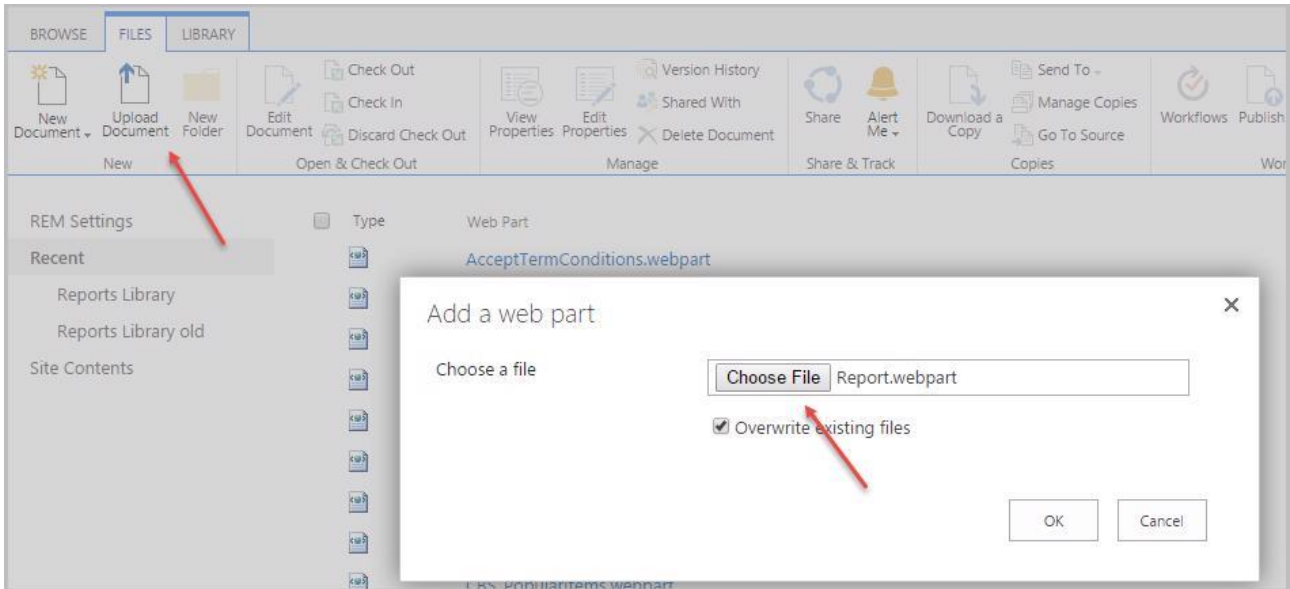
To add custom web report, you need to add Report web part to the necessary page, and then customize it. To do this, do the following:

1. Open any web report page;
2. Go to Settings > Edit page;
3. Choose Report web part, and then click Export link:

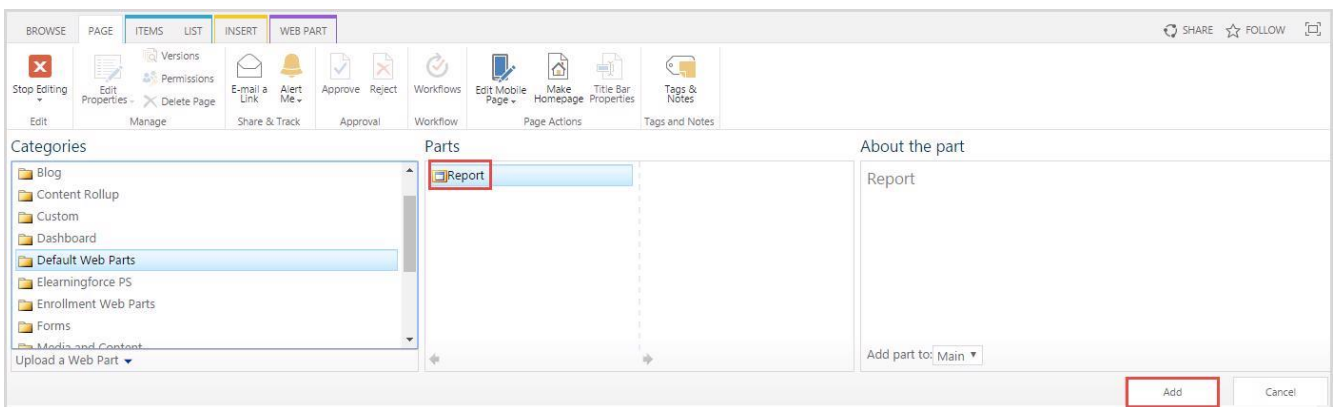


4. Save Report web part file to your local computer (downloaded file has .webpart extension);
5. Go to Site Settings > Web Designer Galleries > Web parts;
6. Upload Report web part to Web Part Gallery:



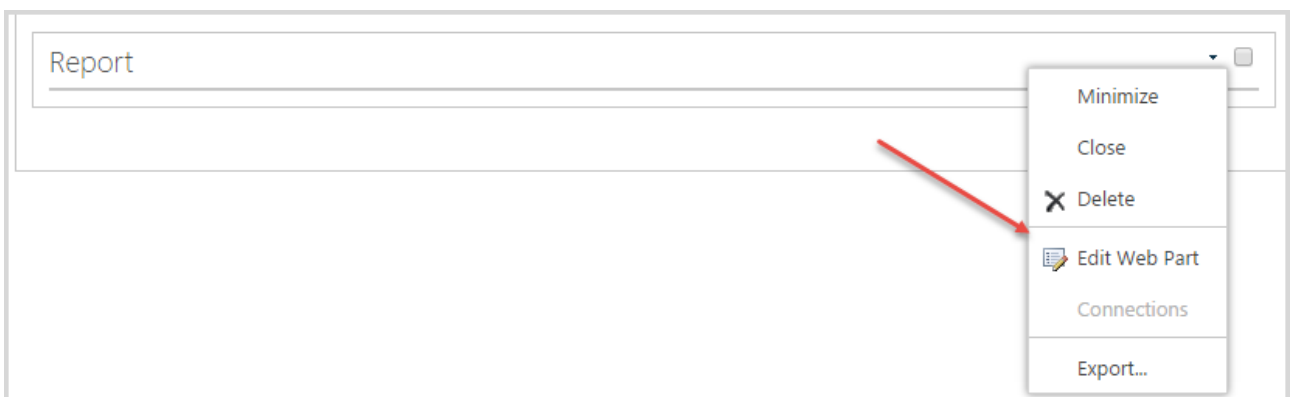


7. After uploading to Web Part Gallery, Report web part can be added to the necessary page:

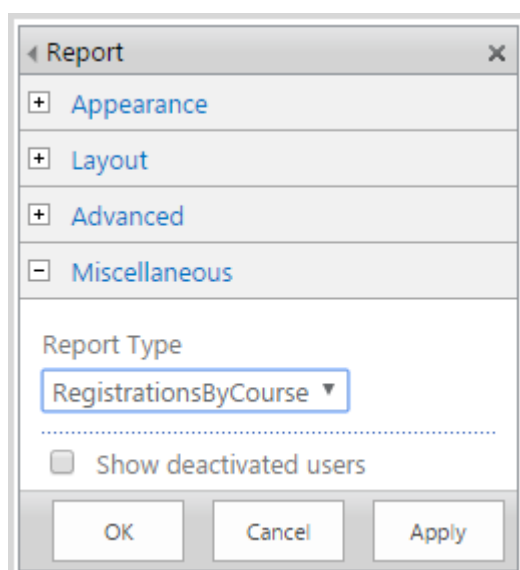


**NOTE:** Depending on the settings specified during the upload, Report web part can be added to the Default Web Parts category or custom category.

8. In the Edit mode choose added Report web part and click Edit Web Part:



9. Expand category Miscellaneous and change the options according to your needs:



10. Click OK button to save the changes, and then Stop Editing button or Save button (depending on a page type) on the ribbon to add custom web report to the necessary page.

## 5.2 Teacher's Operations

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

### 5.2.1 View My Courses

In this section teacher can view the list of Course Offerings he is assigned as a Teacher in REM. This section gives teacher some management possibilities: teacher can enroll users to his Course Offerings, mark attendance, change status of learners' registrations, edit Courses, edit Course Offerings, close Course Offerings, and see reports generated for Course Offerings.





The list is divided into three tabs: Current, Completed and All.

1. Current – displays current Course offerings as well as Course offerings with Access Start Date in future from REM in which the user is assigned as a teacher:

REM [My Dashboard](#) [Course Catalog](#)

## My Courses

Current (4) Completed (1) All (5)

Name		Category	Course Type	Status	Start Date	End Date
<a href="#">Hardware Course</a> 	***	IT and Technical Training	e-Learning	Active	3/31/2016	6/15/2016
<a href="#">Software Course (new)</a> 	***	IT and Technical Training	e-Learning	Active	3/31/2016	
<a href="#">Barista Starcups</a> 	***	General Workplace Training	e-Learning	Active	4/1/2016	4/11/2016
<a href="#">Computers and Technology Course</a> 	***	IT and Technical Training	Classroom Training	Active	4/12/2016 12:00 AM	

Values for the columns are taken from REM Course Offerings:

- Name – displays Course Offering name.  
Clicking the Course Offering name opens the Course Offering details in a pop-up window:

Computers and Technology Course □ ×

---

**COURSE DESCRIPTION**  
Not Set

---


**COURSE SCHEDULE**  
**Starts:** 4/12/2016 - 12:00 AM  
**Ends:** 5/12/2016 - 12:00 AM  
**Time Zone:** (UTC+03:00) Kaliningrad, Minsk

---


**COURSE VENUE**  
**Location:** Minsk, Belarus  
**Room:** Room F (15)

---

**TEACHER(S)**  
Assistant 3



**Course Details**  
Teacher(s): Assistant 3  
Type: Classroom Training  
Category: IT and Technical Training  
Training Points: 42

Clicking the Redirect () icon next to the Course Offering name opens corresponding LMS course site in a new browser tab. Link to the corresponding LMS course site is also available in the callout menu (disregarding the 'Show link to course site' option in Course settings). It is available only for e-Learning Content and Blended Learning Courses:



Software Course

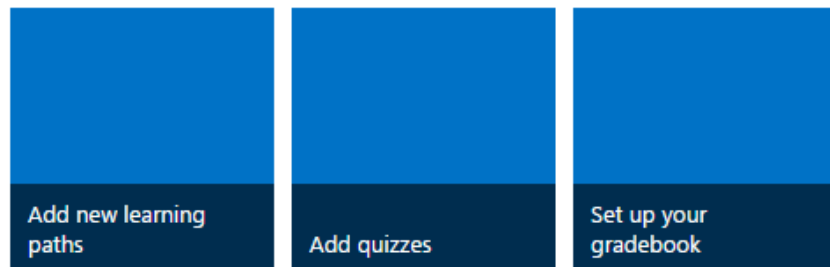
# Software Course

Site Contents

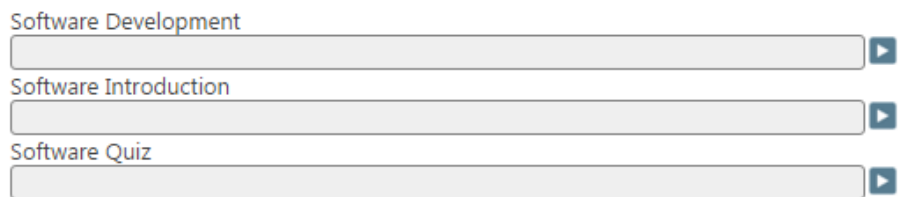
## Welcome to the Software Course!

Get acquainted with the information about the set of instructions that directs a computer to perform specific operations and some programming languages.

### Getting started with your course



### My Learning Modules



- Callout menu (☰) – contains Course Information and links for managing the Course Offering:

### Course Information ✕

Title  
Software Training

Description

Schedule  
Start Date: 11/29/2016 12:00 AM  
End Date: 12/21/2016 12:00 AM

Teachers  
 [ageucheva\\_a](#)

EDIT COURSE    EDIT COURSE OFFERING    COPY/CLONE OFFERING  
MANAGE REGISTRATIONS    CLOSE OFFERING    REGISTER ATTENDANCE  
ENROLL USERS    SEND EMAIL    OFFERING REPORT

- *Edit Course* – allows teacher to make changes to the course. Clicking this link opens edit course dialog window:

Courses - Hardware Course
✕

EDIT

Save  
Commit

Cancel

Paste

Cut

Copy

Attach File

Spelling

Course Title \*

Short Description

Long Description

**Advanced Settings**

Administrators Comments

Created at 3/31/2016 3:54 PM by  ageucheva\_a

Last modified at 4/1/2016 3:00 PM by  System Account

Save

Cancel

**NOTE:** Teacher is able to make changes only to the fields that are chosen by LMS Administrator or Site Collection Administrator in 'Editable Teacher Columns' settings (REM Settings > Common Tools > Editable Teacher Columns). By default those fields are Course Title, Short Description, Long Description and Administrators Comments:

## Courses ▸ Editable Teacher Columns ⓘ

### Select List

Select which list to specify editable columns from

Courses ▼

### Enable Editable Columns

Allow Teachers to edit columns

Allow Teachers to edit columns

### Select Course Type

Select course type to display list of fields

e-Learning Course Site ▼

### Select Columns

Select from the list of available columns which to allow Teachers to edit. Selected columns will appear in the Teacher > My Courses page within the Dashboard and be editable by the assigned teacher(s)

- Administrators Comments
- Certificates Expiration
- Competencies
- Course Category
- Course Duration
- Course Image
- Course Title
- End Date
- Hide Course from Catalog
- Long Description
- Other Info
- Published
- Qualified Teachers
- Recommended For Groups
- Required For Groups
- Short Description
- Show link to course site
- Start Date
- Training Points

- *Edit Course Offering* – allows teacher to make changes to the course offering. Clicking this link opens edit course offering dialog window:

Course Offerings - Hardware Course

EDIT

Save Cancel Paste Copy Attach File Spelling

Commit Clipboard Actions Spelling

Access Period \* From 3/31/2016 To 6/15/2016

Registration Period \*  Date Range  
From To

No Limit

Advanced Settings

Minimum number of Learners

Maximum number of Learners

Teachers Assistant 3;  
Enter users separated with semicolons.

Created at 3/31/2016 3:54 PM by ageucheva\_a  
Last modified at 4/7/2016 11:54 AM by ageucheva\_a

Save Cancel

**NOTE** : Teacher is able to make changes only to the fields that are chosen by LMS Administrator or Site Collection Administrator in 'Editable Teacher Columns' settings (REM Settings > Common Tools > Editable Teacher Columns). By default those fields are Location (if available for selected content type), Room (if available for selected content type), Training Materials (if available for selected content type), Access Start / End Period, Registration Start / End Period, Minimum number of Learners, Maximum number of Learners, Teachers, E-Signature (if available for selected content type):



## Course Offerings ▸ Editable Teacher Columns ⓘ

**Select List**  
Select which list to specify editable columns from Course Offerings ▾

**Enable Editable Columns**  
Allow Teachers to edit columns  Allow Teachers to edit columns

**Select Course Type**  
Select course type to display list of fields e-Learning Offering ▾

**Select Columns**  
Select from the list of available columns which to allow Teachers to edit. Selected columns will appear in the Teacher > My Courses page within the Dashboard and be editable by the assigned teacher(s)

- Access Period
- Auto Recertification
- Course Offering Status
- Currency
- Days Prior to Certificate Expiration
- Enrollment Template
- Groups To Enroll
- Maximum number of Learners
- Minimum number of Learners
- Recommended For Groups
- Registration Period
- Required For Groups
- Teachers
- Time Zone
- Tuition

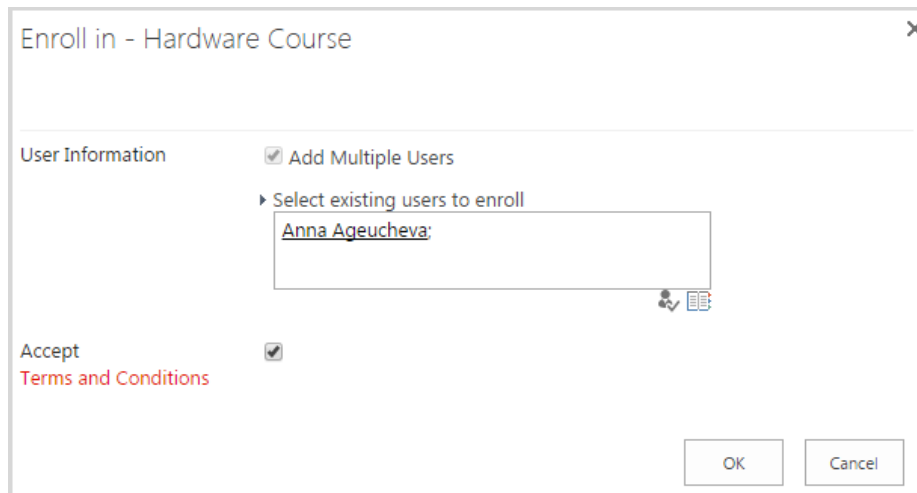
- “Copy/Clone Offering” – allows teacher to copy or clone Course Offering;
- “Close Offering” – allows to change the status of Course Offering to ‘Closed’:

Close Course Offering ✕

i Are you sure you want to close the course offering?

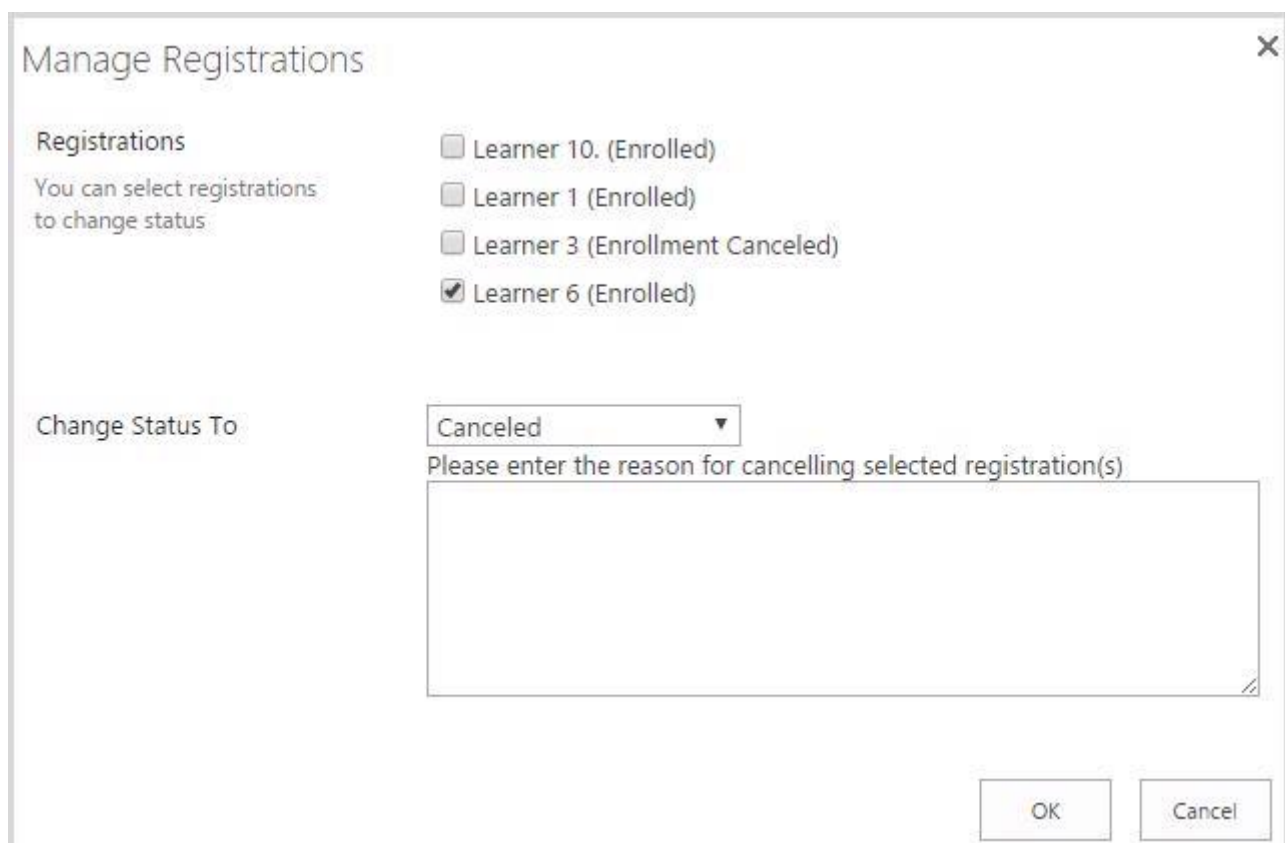
OK
Cancel

- [Register Attendance](#) – is displayed for Classroom, Blended and e-Learning Courses. Allows teacher to mark learners’ attendance;
- *Enroll Users* – allows to enroll new users to the Course Offering;



The screenshot shows a dialog box titled "Enroll in - Hardware Course". It has a close button (X) in the top right corner. The dialog is divided into two main sections. The top section is labeled "User Information" and contains a checked checkbox for "Add Multiple Users". Below this is a section titled "Select existing users to enroll" with a text input field containing the name "Anna Ageucheva". There are small icons for help and a list view to the right of the input field. The bottom section is labeled "Accept" and contains a checked checkbox for "Terms and Conditions". At the bottom right of the dialog are "OK" and "Cancel" buttons.

- [Manage Registration](#) – is displayed for Classroom and Webinar courses. Allows to set course completed or not completed for selected Learners as well as to cancel their registrations. When teacher changes registration status for selected Learners to Canceled, a cancelation reason is required:



The screenshot shows a dialog box titled "Manage Registrations" with a close button (X) in the top right corner. The dialog is divided into two main sections. The top section is labeled "Registrations" and contains the text "You can select registrations to change status". Below this is a list of four learner entries, each with a checkbox: "Learner 10. (Enrolled)", "Learner 1 (Enrolled)", "Learner 3 (Enrollment Canceled)", and "Learner 6 (Enrolled)". The checkbox for "Learner 6 (Enrolled)" is checked. The bottom section is labeled "Change Status To" and contains a dropdown menu currently set to "Canceled". Below the dropdown is a text input field with the placeholder text "Please enter the reason for cancelling selected registration(s)". At the bottom right of the dialog are "OK" and "Cancel" buttons.


When Teacher changes registration status to 'Course Completed', he can set Course Completion date (if Access End Date is specified for this Course Offering, it will be displayed in this field; if no – current date and time will be displayed):

### Manage Registrations ✕

**Registrations**  
You can select registrations to change status

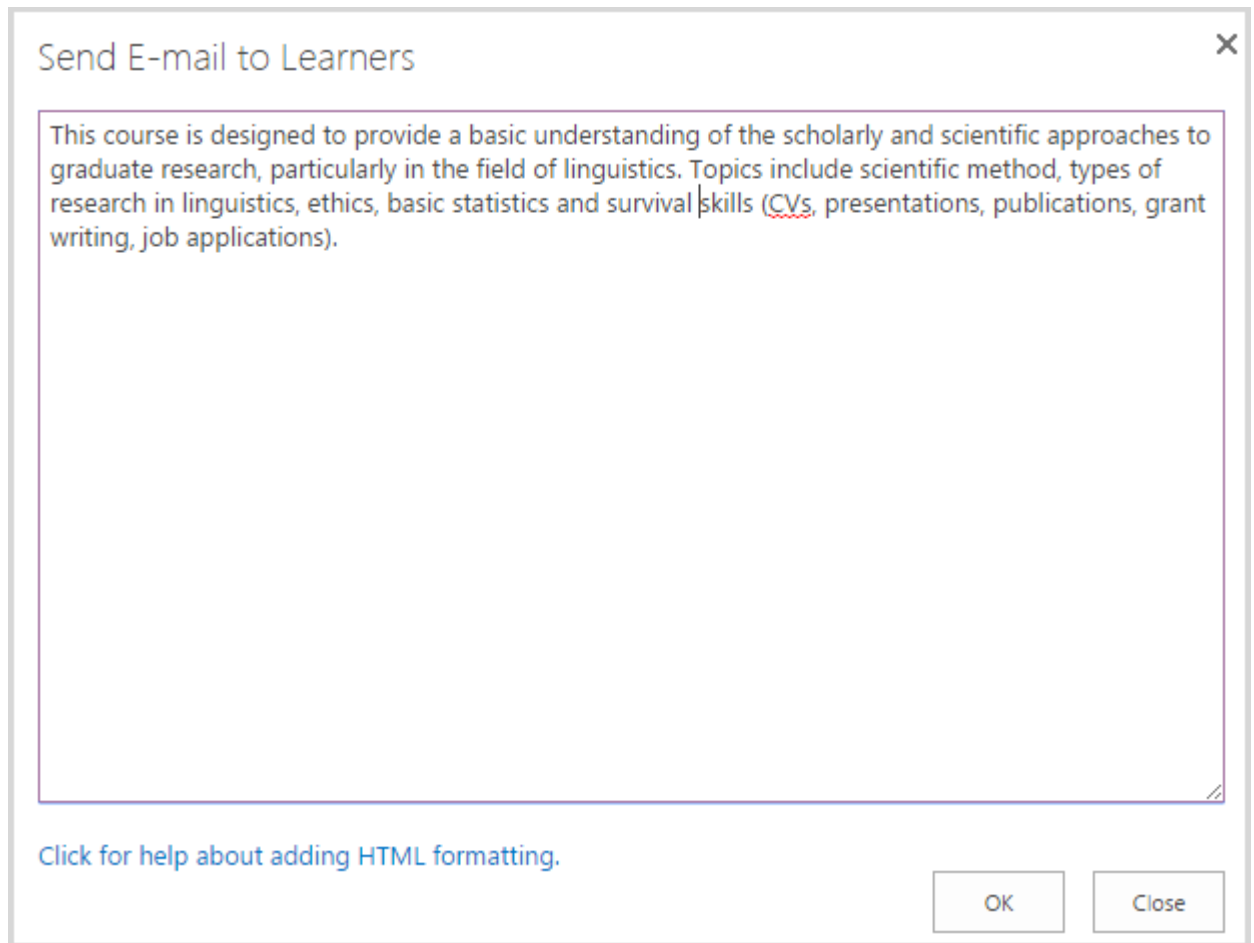
Learner 1 (Enrolled)  
 ageucheveva\_a (Enrolled)

Change Status To Course Completed ▾

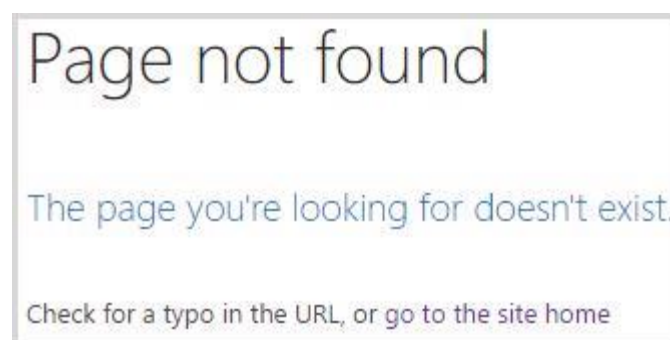
Course Completion Date 26/07/2017  12: ▾ 20 ▾

**NOTE:** Time value is available in the date picker if EARNINGFORCE – REM: Course Offering Access Period feature is activated.

- *Go to Course Site* – is displayed for e-Learning and Blended course types. Opens LMS course site in a new browser tab;
- *Send Email* – provides sending an email to all Learners, which are enrolled in the course:

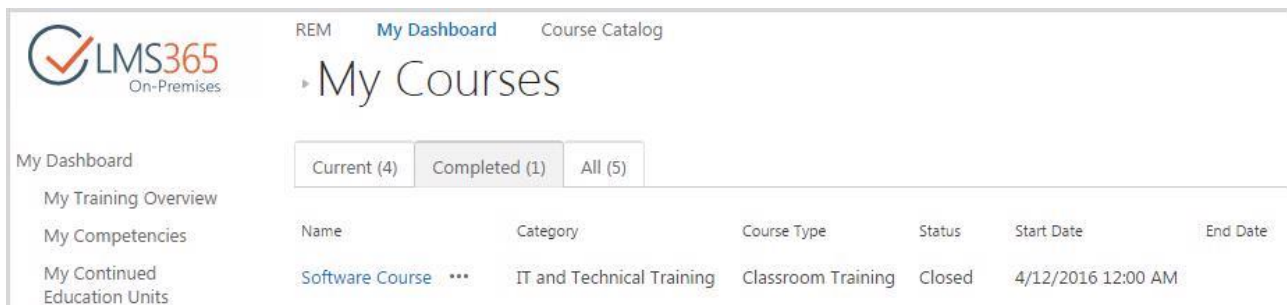


- *Offering Report* – allows Teacher to open an already generated for this Course Offering report in a new browser tab. If user is not a Teacher of the selected Course Offering and tries to open Report page using direct link, he will see the following message:



- Course Type – displays the type of the course from REM Course Offering;
- Status – displays status of the Course Offering taken from REM;
- Start Date – displays the Access Start Date of Course Offering;
- End Date – displays the Access End Date of Course Offering;

- Completed – displays closed Course Offerings from REM in which the user is assigned as a teacher:



REM [My Dashboard](#) [Course Catalog](#)

## My Courses

My Dashboard

My Training Overview

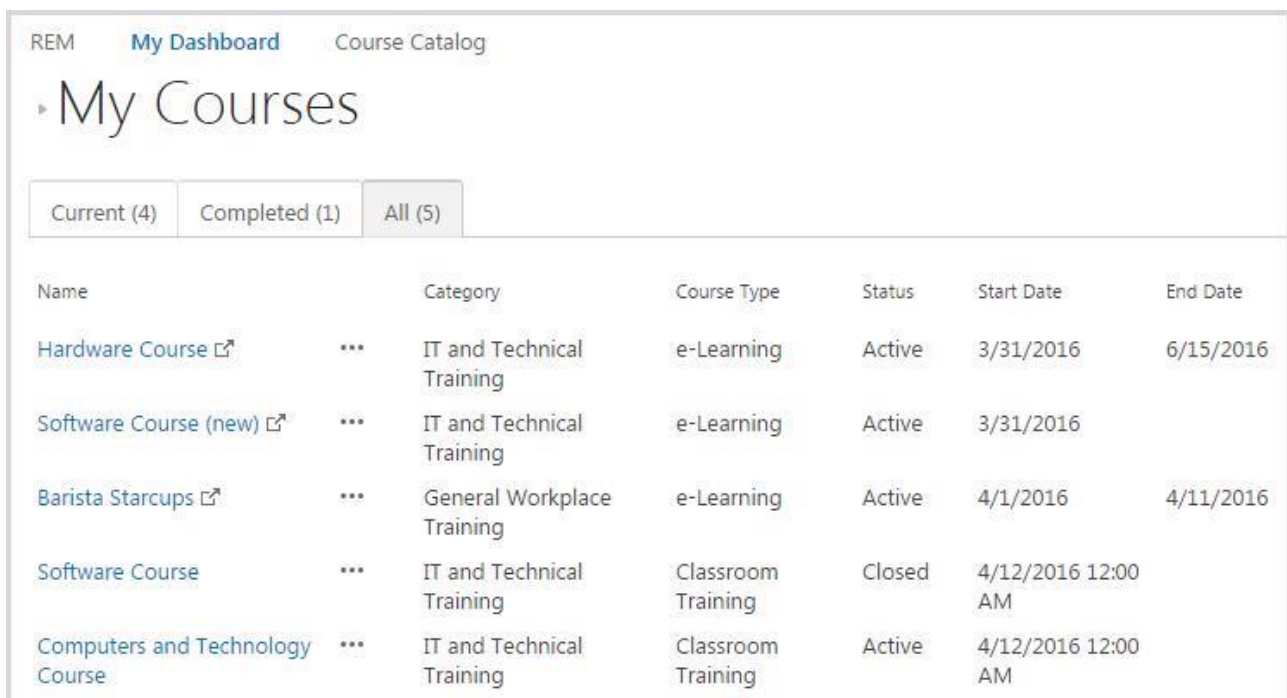
My Competencies

My Continued Education Units

Current (4) **Completed (1)** All (5)

Name	Category	Course Type	Status	Start Date	End Date
Software Course ...	IT and Technical Training	Classroom Training	Closed	4/12/2016 12:00 AM	

- All – displays All Course Offerings from REM in which the user is assigned as a teacher:



REM [My Dashboard](#) [Course Catalog](#)

## My Courses

Current (4) Completed (1) **All (5)**

Name	Category	Course Type	Status	Start Date	End Date
Hardware Course ↗	IT and Technical Training	e-Learning	Active	3/31/2016	6/15/2016
Software Course (new) ↗	IT and Technical Training	e-Learning	Active	3/31/2016	
Barista Starcups ↗	General Workplace Training	e-Learning	Active	4/1/2016	4/11/2016
Software Course	IT and Technical Training	Classroom Training	Closed	4/12/2016 12:00 AM	
Computers and Technology Course	IT and Technical Training	Classroom Training	Active	4/12/2016 12:00 AM	

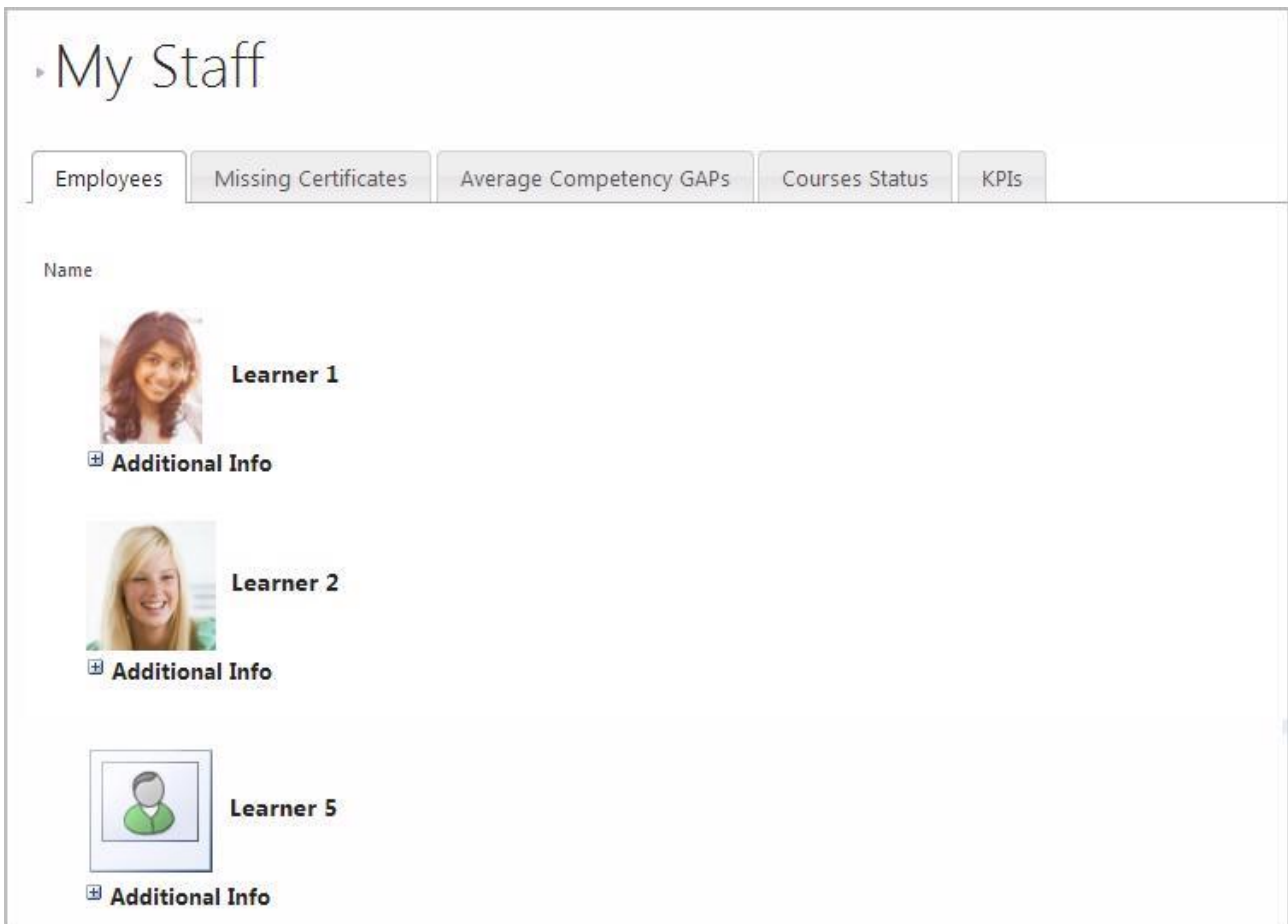
## 5.3 Manager's Operations

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

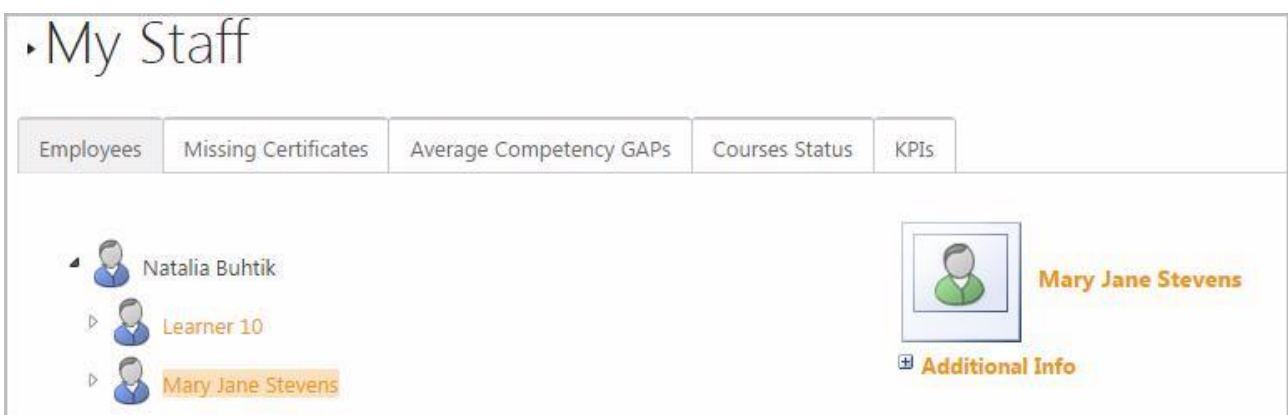
**NOTE:** Manager's section is available for manager only if his employees have Active CCM profiles. If all his employees have Deactivated CCM profiles, Manager's section disappears.

### 5.3.1 View My Staff

In this section manager can view the list of his staff. Two views are possible here depending on Manager Settings. This option is controlled on Dashboard Settings page (refer to REM & Dashboard Administration Guide to modify it): Tree View and List View:



If List view is selected (checkbox "Show tree of staff" is empty), user can see only one level of his subordinate staff:



If Tree view is selected (checkbox “Show tree of staff” is checked), user can see the tree of staff, below him, and can view employee of his subordinate staff, by default they are collapsed, but user can expand them.

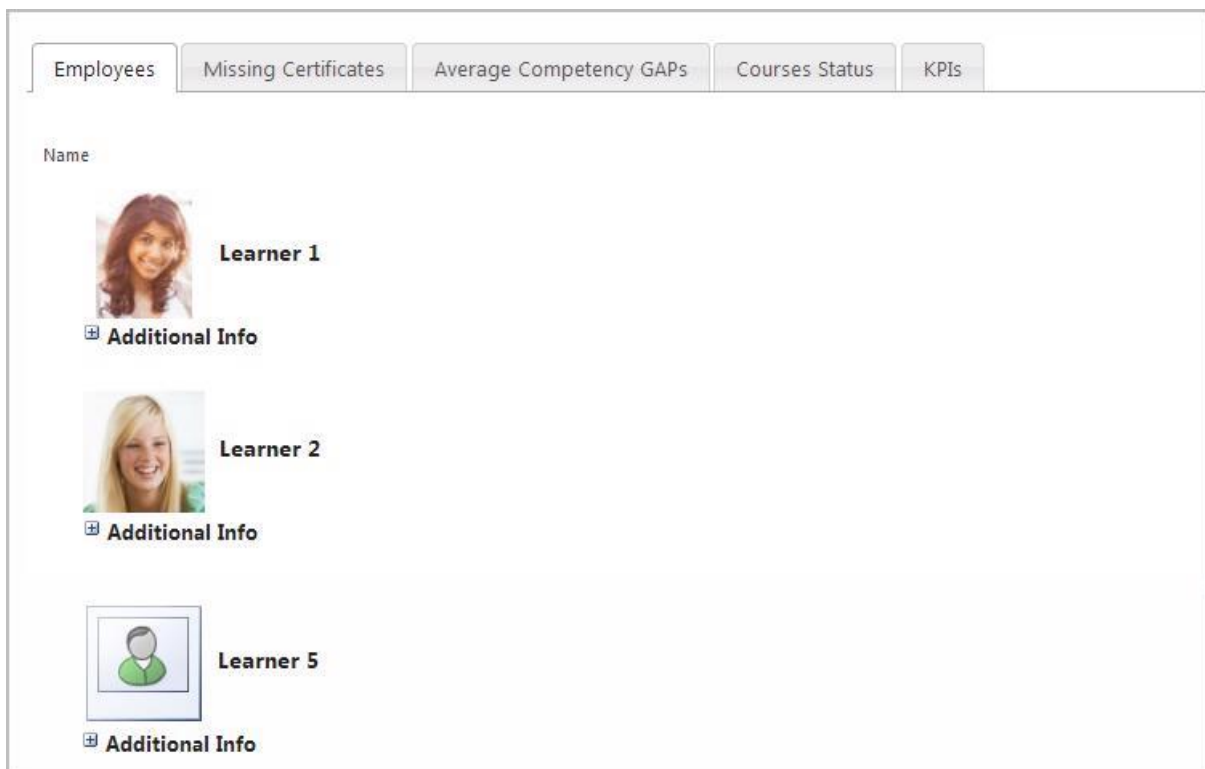
It is possible to switch between the following tabs:

- Employees;
- Missing Certificates;
- Average Competency Gaps;
- Courses Status;
- KPIs.

**NOTE:** If Tree view is enabled, tabs Missing Certificates, Missing Certifications, Average Competence Gaps, Courses Status and KPIs operate for the direct subordinates of this manager only.

### 5.3.1.1 Employees tab

Here manager can view the list of his subordinate staff:



If List view is enabled, shows list of manager’s direct subordinates. Manager can expand and view profile information about each employee:



If Tree view is enabled, shows hierarchy of managers and direct employees of the logged in manager in a tree view. Each employee's or manager's profile information can be viewed by expanding. User can expand and view the list of each manager's direct subordinates.

**NOTE:** User selected in Employees tab is automatically selected in all tabs of My Staff page (Missing Certificates, Missing Certifications, Average Competency GAPS, Courses Status) and tools below the My Staff (Courses, Competencies, Training Points, Action Plan, Certificates, Attendance, Score, Assignments, Announcements and Links).

#### 5.3.1.2 *Missing Certificates Tab*

Here manager can view the list of employees' and/or managers' names with missing certificates. By default, missing certificates from REM are shown. It is also possible to group all missing certificates by product (CCM, LMS and REM). The number of missing certificates is displayed in brackets next to employee name.

**NOTE:** Name in LMS section is the name of course, while in CCM section it is Certificate Template title.



## My Staff

Employees **Missing Certificates** Average Competency GAPS Courses Status KPIs

Certificate

- ▶ **Chris Evans (lrn3) (0)**
- ▲ **Mary Jane Stevens (lrn1) (0)**
  
- ▶ **Zane Lowe (lrn11) (0)**
- ▶ **Chris Evans (lrn3) (4)**
- ▲ **Mary Jane Stevens (lrn1) (4)**

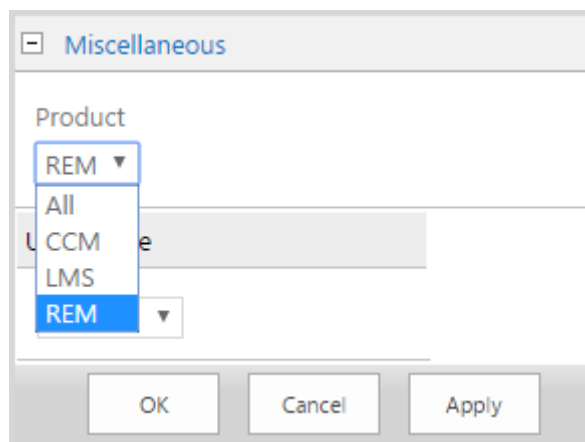
  - Corporate SkyDrive Pro Training
  - Demo Course 3
  - AVK Demo Course
  - Demo Coffee Course

- ▶ **Zane Lowe (lrn11) (1)**
- ▶ **Chris Evans (lrn3) (0)**
- ▲ **Mary Jane Stevens (lrn1) (2)**

  - Demo Coffee Course
  - Accounting Expert - Offline Course

- ▶ **Zane Lowe (lrn11) (0)**

To display certificates from one product, change settings of the web part:

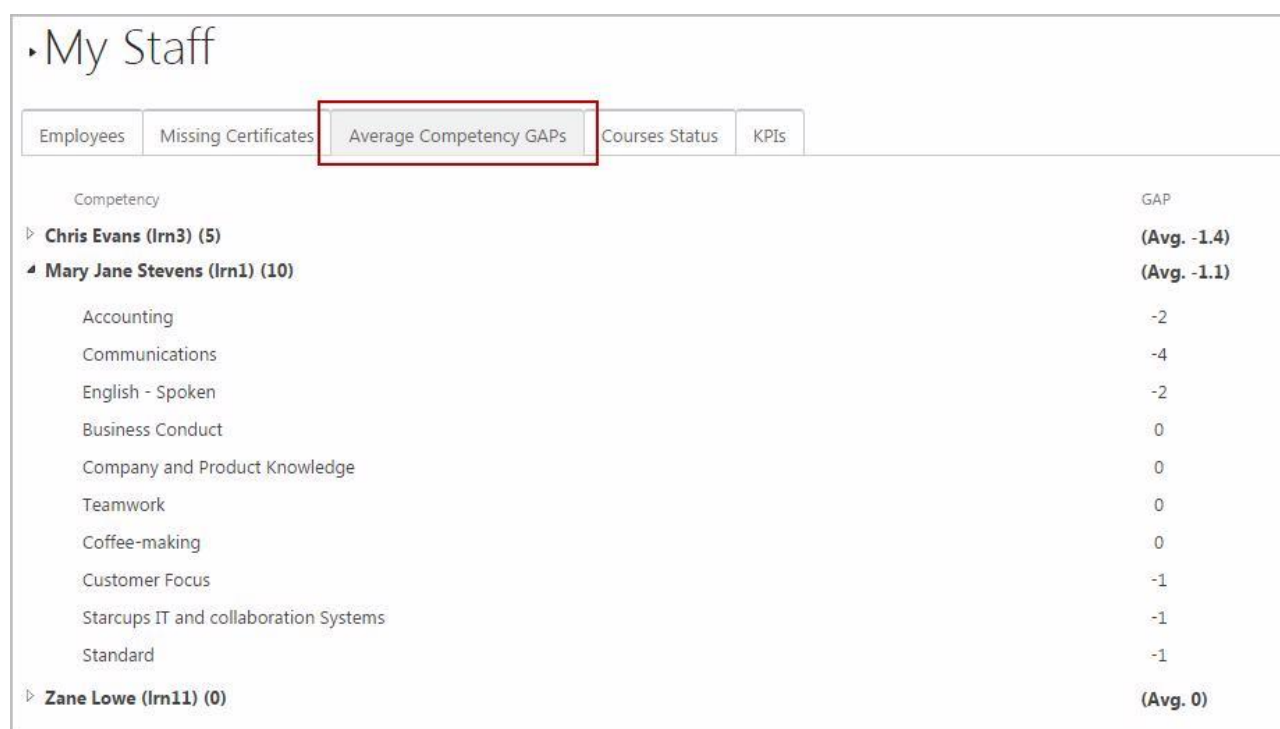


**NOTE:** In LMS Certificates are considered as missing if in course, where user is in Learners group (Organization from REM) does not have certificate and certificate template is set in Grade Book settings; if template is not set, certificate won't be displayed as missing. In CCM section only certificate templates linked to required competency level and not granted to user will be considered as missing.

### 5.3.1.3 Average Competency GAP's Tab

Here manager can see the list of employees' and/or managers' average competency GAP displayed in brackets next to the employee's or manager's name.

List of employee's and/or managers' names is displayed in a table with two columns: Competency (competence held by an employee or a manager) and GAP (competence GAP). Number in brackets after employee name shows his competencies count. To see the list of employee's competencies with GAPs, click the name of the employee (it is not shown by default):



Competency	GAP
▶ <b>Chris Evans (lrm3) (5)</b>	<b>(Avg. -1.4)</b>
▲ <b>Mary Jane Stevens (lrm1) (10)</b>	<b>(Avg. -1.1)</b>
Accounting	-2
Communications	-4
English - Spoken	-2
Business Conduct	0
Company and Product Knowledge	0
Teamwork	0
Coffee-making	0
Customer Focus	-1
Starcups IT and collaboration Systems	-1
Standard	-1
▶ <b>Zane Lowe (lrm11) (0)</b>	<b>(Avg. 0)</b>

**NOTE:** Average competence GAP is calculated like arithmetic mean of GAPs of all Competences that the user has. Only negative and 0 values are shown. If competency is not required (only held or suggested) is not shown and not counted.

### 5.3.1.4 Courses Status tab

List of employee's and/or managers' names is displayed in a table with two columns: Course and Status. Number in brackets after employee name shows his courses count. To see the list of employee's courses, click the name of the employee (it is not shown by default).

The following statuses can be displayed in this table:

- Enrolled – user does not have any completed attempts to learning objects;
- Not Completed – user has at least one attempt to any learning object or at least visited the course;
- Enrollment Cancelled – user’s enrollment has been cancelled;
- Completed – user completed attempt to all learning objects of the course.

**NOTE:** Attempt is considered completed according to object settings (last/best) and statuses (Passed/Not Passed/Finished) refer to My Training Overview section.

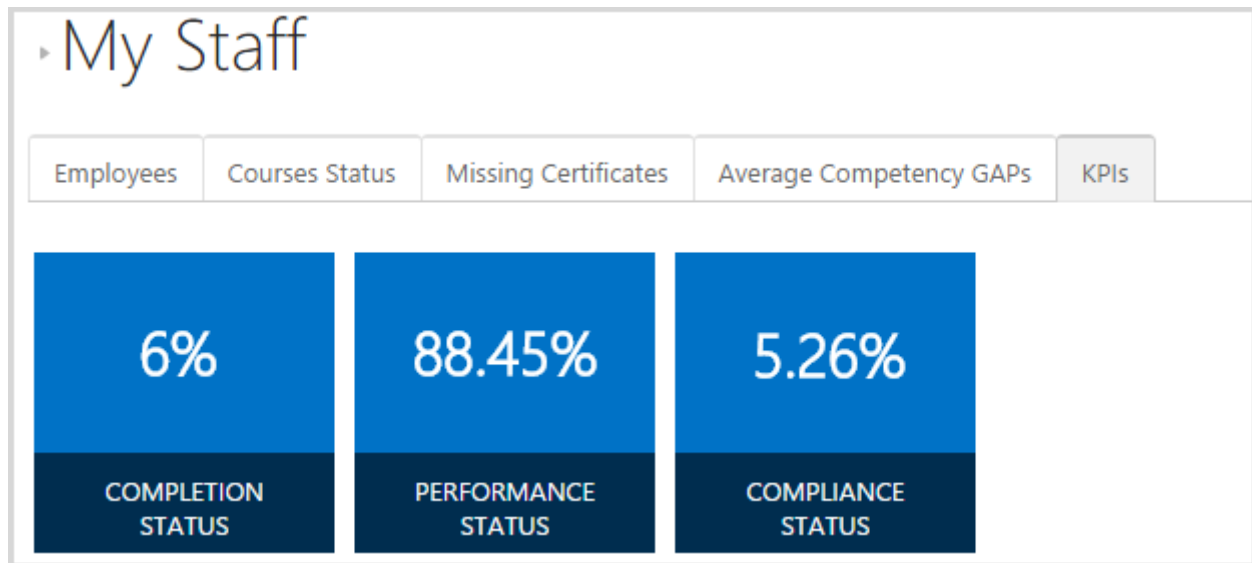
My Staff

Employees | Missing Certificates | Average Competency GAPS | **Courses Status** | KPIs

Course	Status
▶ <b>Chris Evans (Irn3) (4)</b>	
▲ <b>Mary Jane Stevens (Irn1) (11)</b>	
Super Barista	Enrollment Canceled
Starcups On-boarding	Not Completed
Lync (offline course)	Not Completed
Huber Demo Course	Completed
SharePointLMS Training	Completed
Coffee Demo Classroom Training	Enrolled
Demo Coffee Course	Enrolled
Microsoft	Enrolled
Accounting Expert - Offline Course	Enrolled
Leadership	Completed
Accounting Course	Enrolled
▶ <b>Zane Lowe (Irn11) (1)</b>	

### 5.3.1.5 Key Performance Indicators

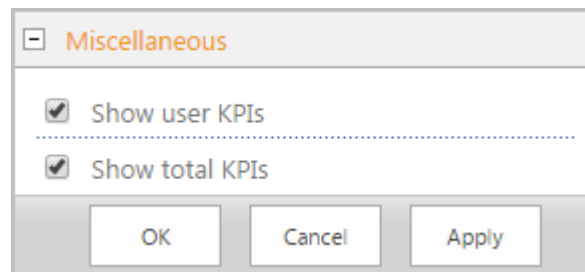
This tab displays Key Performance Indicators for manager’s Staff members:



The web part displays the following set of indicators:

- Completion Status – shows % of completed registrations out of all registrations for the Staff members;
- Performance Status – shows average score (in percentage terms) of all graded items from all courses for the Staff members;
- Compliance Status – shows % of valid certificates for all courses with certificates for the Staff members.

To enable display of and for all the Dashboard users, change settings of the web part:



The following indicators will be added:



- Total Completion Status - shows % of completed registrations out of all registrations for all the Dashboard users;
- Total Performance – shows average score (in percentage terms) of all graded items from all courses for all the Dashboard users;
- Total Compliance Status – shows % of valid certificates for all courses with certificates for all the Dashboard users.

### 5.3.2 View User's Information

In this section manager can choose the needed user and see his profile information.


On each page in this section manager can select user using the 'Select User' field:




Select User   

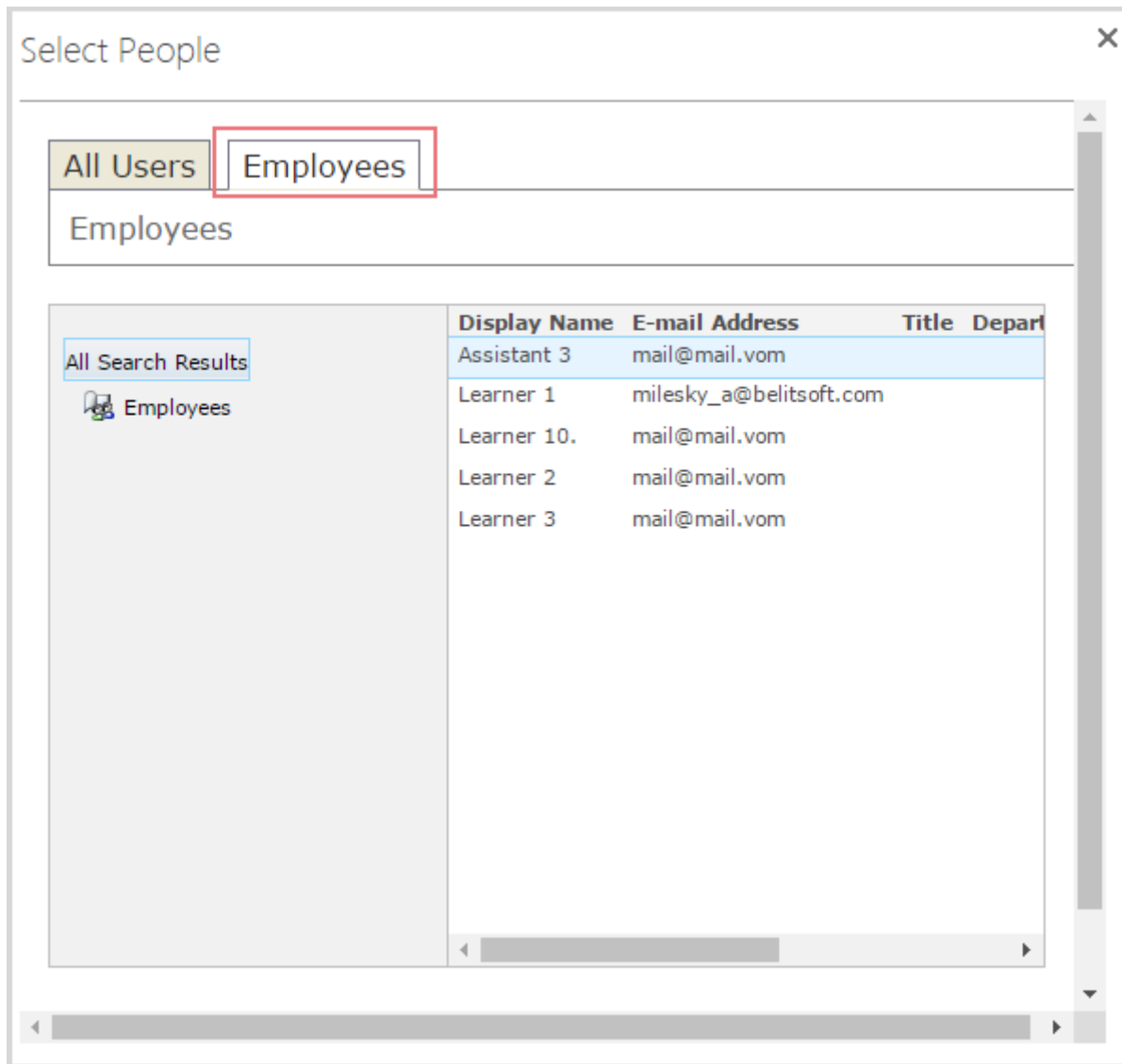
To select a user enter his name in Select User field and use Check names () button, or use the Browse icon () to select user from the directory service. If "Show all users" checkbox is selected in Manager Settings, user can select from two tabs – Employees and All Users. If this option is not enabled, user can select only his direct subordinates:

### Select People ✕

All Users
Employees

Find  
List View ▼

	Display Name	E-mail Address	Title	Department
<ul style="list-style-type: none"> <li> Organizations</li> <li> All Users</li> <li> Active Directory</li> </ul>	Type into the search box above then press "Enter" to			



Selected user's name is displayed in the Select User field:



User selected in My Staff > Employees tab is automatically selected in the Profile. Selection of a user can be cleared from the drop-down after clicking its name in the upper right corner.

The following sections are available for the selected profile: Courses, Competencies, Training Points, Action Plan, Certificates, Attendance, Score, Assignments and Announcements:



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

### 5.3.2.1 View User's Courses


Here manager can view courses taken by selected user.

Data that is displayed here has the same view as described in paragraph [6.2 View My Training Overview](#):

## 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

**NOTE:** Curriculums tab is added after the ELEARNINGFORCE - REM: Curriculum feature activation.

### 5.3.2.2 View User's Competencies

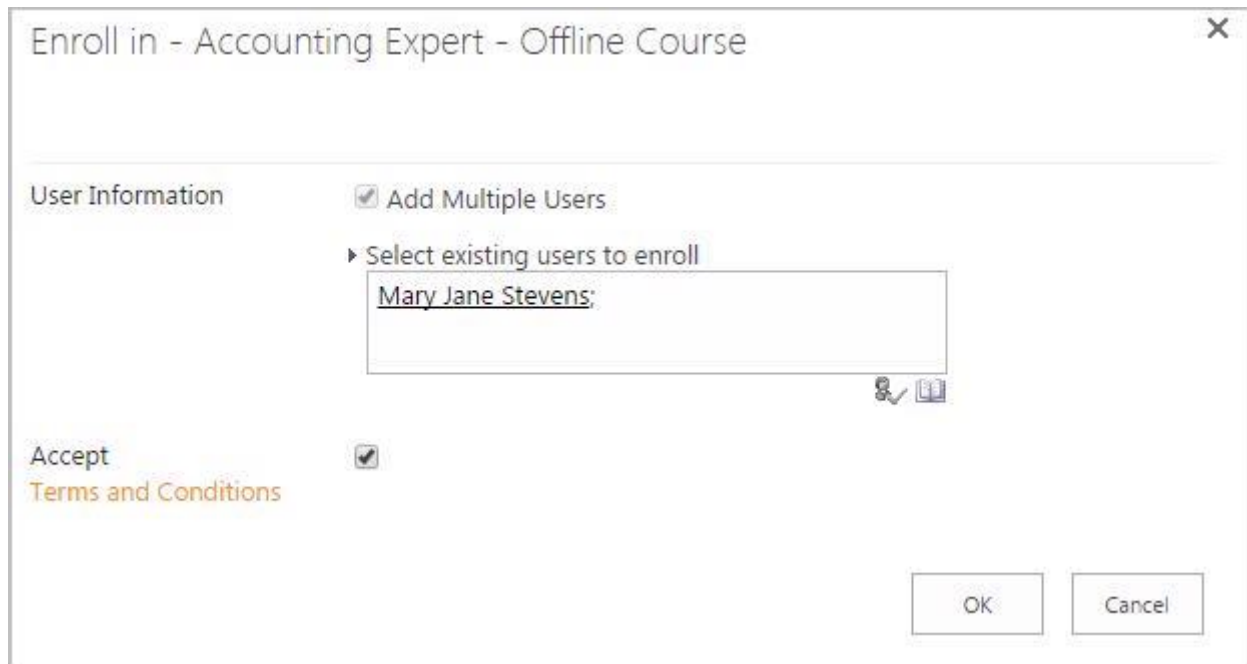
Here manager can view a list of competencies gained by selected user.

Data that is displayed here has the same view as described in paragraph [6.3 View My Competencies:](#)

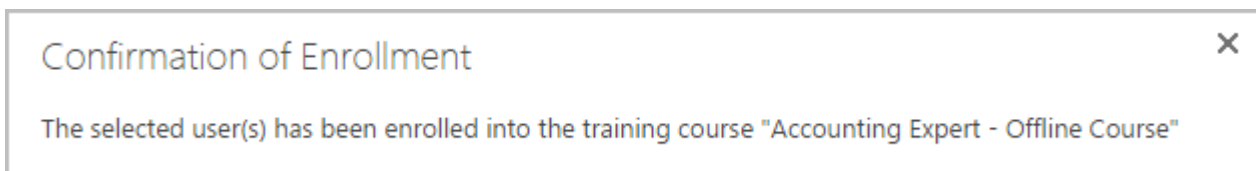
Competencies						
Select User <input type="text" value="Anna Ageucheva"/>						
Held	Required	Revoked	All			
Title	User Level	Required	Suggested	GAP	Earned	Fill GAP
<b>Foreign Language Competencies</b>						
English-Spoken	1 2 3 4 5	4	4 (Starcups Store Manager)	0	4/7/2016	
<b>Group 1</b>						
Business Conduct	1 2 3 4 5	3	4	0	4/11/2016	
<b>Technical Competencies</b>						
Advanced Barista Skill	3 2 1	Not Present	Not Present	Not Present	4/11/2016	
Accounting	1 2 3 4 5	4	Not Present	0	4/11/2016	
<b>Ungrouped</b>						
Communication	1 2 3 4 5	4	5 (Starcups Store Manager)	0	3/31/2016	

When you use 'Fill GAP' functionality and want to enroll the user into a course, the system fills the enrollment form selecting the appropriate user automatically:





An Enrollment Confirmation message without any redirect buttons is displayed to confirm successful enrollment:





An e-mail notification is sent automatically to this learner after successful enrollment.

**NOTE:** If course that provides the needed competency level is locked by Curriculum prerequisites or by Course prerequisites inside the curriculum to which learner is assigned, you will see locked icon next to it and its title will not be clickable.

You can grant competency manually to an employee. Select option and click Next:

### Choose how to fill GAP ✕

**Grant Competency Manually**  
Use this option to grant the competency.

**Enroll into a Course**  
Select a course that provides the needed competency and enroll.

If you select Grant Competency Manually, a warning is displayed to the User notifying that he is upgrading the Competency's Level to close the GAP. The Competency with the required level is already selected in the Competency field:

### Fill GAP - Mary Jane Stevens ✕

EDIT

 Save	 Cancel	 Paste	 Cut	 Copy	 Delete Item	 ABC Spelling
Commit		Clipboard		Actions		Spelling

Competency \*  ▼  
Certification is not required in any way, even if the competency level is assigned to a certificate template.

Issued Date \*

Comments

[Click for help about adding basic HTML formatting.](#)



Version: 1.0

Created at 7/29/2016 11:03 AM by  ageucheva\_a

Last modified at 7/29/2016 11:03 AM by  ageucheva\_a

You can select Issued Date for the granted competency (by default, current date is set). This date will be displayed as Earned Date on Competencies web part as well as in web reports. Click Save button to close the GAP or Cancel button to discard the process. The User is redirected back to the Personal Competencies page with the upgraded User Level for the Competency and GAP displaying zero to show the GAP is no longer present:

## Competencies

Select User   

Held

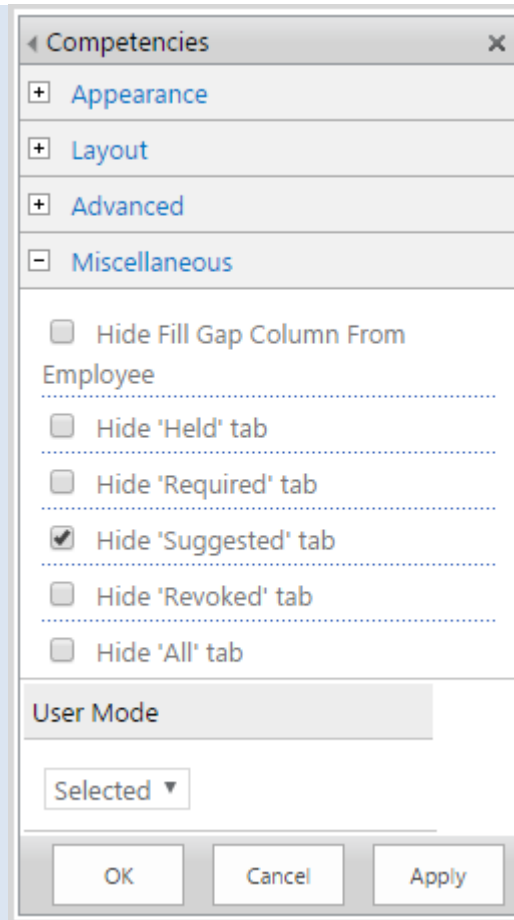
Required

Revoked

All

Title	User Level	Required	Suggested	GA...	Earned	Comments	Fill GAP
<b>Foreign Language Competencies</b>							
English-Spoken	1 2 3 <b>4</b> 5	4	4 (Starcups Store Manager)	0	4/7/2016	View Entries...	
<b>Ungrouped</b>							
Communication	1 2 3 <b>4</b> 5	4	5 (Starcups Store Manager)	0	3/31/2016	View Entries...	

**NOTE:** It is possible to hide 'Fill GAP' link from users. To do it, open the Competencies web part settings and enable option 'Hide Fill Gap Column From Employee' in Miscellaneous section. The link will still be displayed for managers:



It is also possible to hide 'Held'/'Required'/'Suggested'/'Revoked'/'All' tabs. Suggested tab is hidden by default.

### 5.3.2.3 View Staff Competencies

Here manager can view a list of competencies gained by his subordinates:

## Staff Competencies

Held Required All

Title	Staff Level	Required	GAP
<b>General Employee Competencies</b>			
English - Spoken	1 2 3 4 5	Not Present	-1
Advanced Barista Skill	1 2 3 4 5	Not Present	Not Present
Coffee-making	1 2 3 4 5	Not Present	Not Present
Company and Product Knowledge	1 2 3 4 5	Not Present	Not Present

Annie Mac

---

Held Required Revoked All

Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
<b>General Employee Competencies</b>							
English - Spoken	1 2 3 4 5	Not Present	Not Present	Not Present	7/15/2015	<a href="#">View Entries...</a>	<a href="#">Fill GAP</a>
Company and Product Knowledge	1 2 3 4 5	1	Not Present	0	7/15/2015	<a href="#">View Entries...</a>	

Laura Smith

---

Held Required Revoked All

Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
<b>General Employee Competencies</b>							
English - Spoken	1 2 3 4 5	Not Present	Not Present	Not Present	7/15/2015	<a href="#">View Entries...</a>	

Mary Jane Stevens

---

Held Required Revoked All

Title	User Level	Required	Suggested	GAP	Earned	Comments	Fill GAP
<b>General Employee Competencies</b>							
English - Spoken	1 2 3 4 5	Not Present	3	Not Present	6/5/2015	<a href="#">View Entries...</a>	<a href="#">Fill GAP</a>
Coffee-making	1 2 3 4 5	1	Not Present	0	6/5/2015	<a href="#">View Entries...</a>	
Advanced Barista Skill	1 2 3 4 5	Not Present	Not Present	Not Present	6/5/2015	<a href="#">View Entries...</a>	
Company and Product Knowledge	1 2 3 4 5	2	Not Present	-1	6/5/2015	<a href="#">View Entries...</a>	<a href="#">Fill GAP</a>

Staff competencies are grouped in the following tabs:

- Held – the list of competencies that are currently held by at least one subordinate;
- Required – the list of competencies that are required for at least one subordinate;
- All – the list of all (Held and Required) Staff competencies.

**NOTE:** Staff Level is the Staff Competency's Level that is calculated as an average of User Levels of all subordinates for the competency.  
 Required is the Required Level for the Staff competency that is the highest Required Level for this competency from the Personal Competencies of subordinates.  
 GAP is calculated as the difference between the Required and Staff Level value.  
 In the case presented on the screenshot above it is calculated for 'English – Spoken' competency as follows:



1. Staff level value is calculated:



	<p>Annie Mac –User Level 2;          Laura Smith – User Level 3;          Mary Jane Stevens – User Level 1;          The total number of points is divided by the number of subordinates: <math>6/3 = 2</math>          2. The Gap is calculated:          The Required level is abstracted from the Staff level value: <math>2 - 3 = -1</math>          On the screenshot presented above GAP for 'English – Spoken' competency is '-1'.</p>
<b>NOTE:</b>	To make Staff Competencies link visible in the left side menu on old REM sites, user must reactivate ELEARNINGFORCE - Dashboard: REM Integration feature.

#### 5.3.2.4 View User's Training Points

Here manager can view a list of Training Points earned and planned to earn (Training Points from the courses with 'Waiting For Start Date' status are also displayed in this tab) by selected user. Data that is displayed here has the same view as described in paragraph [5.1.4 View My Training Points](#):

## Training Points

Select User   

Select Period   -  

Total Training Points earned for the selected period: 402

Earned	Planned	All
Course Name	Date Earned	Training Points
new course	9/14/2016	34
classroom course (flow)	9/14/2016	23

**NOTE:** By default, only courses for which some Training Points are assigned are displayed in this list. To display in this list courses for which no Training Points are assigned, enable the option "Include Courses with Zero Training Points" in the web part settings:

Miscellaneous



Include Courses with Zero Training Points

### 5.3.2.5 View User's Action Plan

Here manager can view a list of suggested and pending competencies grouped by roles for the selected user.

Data that is displayed here has the same view as described in paragraph [5.1.5 View My Action Plan](#):

## ▸ Action Plan

Select User   



▼ Competency Name	▼ Competency Group	▼ Is Acquired	▼ GAP	▼ Earned	▼ Due Date	Comments	Fill GAP
<b>▾ Competencies</b>							
English-Spoken-Above Average	Foreign Language Competencies	No	-4	7/28/2016			<a href="#">View Entries...</a>


### 5.3.2.6 View User's Certificates

Here manager can view a list of certificates from LMS, CCM and REM of selected user.

Data that is displayed here has the same view as in paragraph [5.1.6 View My Certificates](#):

## ▸ Certificates

Select User   

 Upload a Certificate

Title	Issued Date	Expiration Date
Super Barista	05/06/2015	05/06/2016
Huber Demo Course	27/03/2014	
SharePointLMS Training	07/07/2014	
SharePointLMS Training	07/07/2014	
Leadership	08/06/2015	
Leadership	23/06/2015	
Leadership	29/07/2015	

Upload a Certificate button allows Manager to upload a single external certificate from Dashboard for the selected user. Click Upload a Certificate button and fill the open form as described in paragraph [4.1.17 Importing External Certificates](#).



### 5.3.2.7 View User's Attendance

**NOTE:** By default this menu item is hidden. To display it, edit the 'Attendance' link as described in the [Navigation](#) section.

In this section manager can view attendance information for selected user from the courses and course offerings he is taking.

To view attendance of a course, select it by clicking on its title. Calendar with user's attendance will be displayed.

To view attendance of another user, use Select User field:

Select User   

Title	URL	<span>←</span> <span>→</span> April 2016 <a href="#">Expand All</a> <a href="#">Collapse All</a>   <a href="#">1</a> Day <a href="#">7</a> Week <a href="#">31</a> Month						
		SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Hardware Course	<a href="http://srv-fe01-sp2013/sites/hard">http://srv-fe01-sp2013/sites/hard</a>	27	28	29	30	31	1	2
Software Course (new)	<a href="http://srv-fe01-sp2013/sites/softn">http://srv-fe01-sp2013/sites/softn</a>							
Barista Starcups	<a href="http://srv-fe01-sp2013/sites/star">http://srv-fe01-sp2013/sites/star</a>							
Computers and Technology Course	<a href="http://srv-fe01-sp2013/sites/rew">http://srv-fe01-sp2013/sites/rew</a>	3	4	5	6 8:00 am Not 10:00 am Pre	7 10:00 am - Not preser	8 8:00 am 10:00 am	9
		10	11 8:00 am N 10:00 am	12 10:00 am Not pres	13 8:00 am Not 10:00 am No	14 10:00 am - Not preser	15 8:00 am 10:00 am	16
		17	18 8:00 am N 10:00 am	19 10:00 am Not pres	20 8:00 am Not 10:00 am No	21 10:00 am - Not preser	22 8:00 am 10:00 am	23
		24	25 8:00 am N 10:00 am	26 10:00 am Not pres	27 8:00 am Not 10:00 am No	28 10:00 am - Not preser	29 8:00 am 10:00 am	30

Click link in the URL column to open the needed LMS course in a new browser tab.

### 5.3.2.8 View User's Score

**NOTE:** By default this menu item is hidden. To display it, edit the 'Score' link as described in the [Navigation](#) section.

In this section manager can view grades and Certificate received for the learning objects from LMS Courses by selected user. List of courses is displayed in a table with two columns – Title (title of the LMS course) and URL (URL of the course).



To view grades of a certain user, do the following:

1. Select the needed user using Select User field;
2. Click the Title of the needed course from the list:

## Score

Select User

Title	URL	Module	Score
Hardware Course	<a href="http://srv-fe01-sp2013/sites/hard">http://srv-fe01-sp2013/sites/hard</a>	essay	A* (100 %)
Software Course (new)	<a href="http://srv-fe01-sp2013/sites/softn">http://srv-fe01-sp2013/sites/softn</a>	Essay 2	100.00 (100 %)
Barista Starcups	<a href="http://srv-fe01-sp2013/sites/star">http://srv-fe01-sp2013/sites/star</a>	Report	A (95 %)
Computers and Technology Course	<a href="http://srv-fe01-sp2013/sites/rew">http://srv-fe01-sp2013/sites/rew</a>	Company's Principles	U (0 %)
		Introductory Quiz	A* (100 %)
		General Information	Failed (0 %)
		Introduction	Passed (100 %)

Click link in the URL column to open the needed LMS course in a new browser tab.

If Certificate is granted, it is possible to view the certificate by clicking Open Certificate link.

**NOTE:** Regardless of the column view in Course Grade Book, combined view of score is displayed. Scores hidden from default view (unchecked for view) are not displayed.

### 5.3.2.9 View User's Assignments

**NOTE:** By default this menu item is hidden. To display it, edit the 'Assignments' link as described in the [Navigation](#) section.



In this section manager can view all assignments made for selected user.

To view assignments of a certain user, do the following:

1. Select the needed user using Select User field;
2. Click the Title of the needed course from the list.

You can choose between Grid and Calendar view for the assignments:

## Assignments

Select User:    Current View: **Grid** ▾

Title	URL		Title	Due Date	Status
Hardware Course	<a href="http://srv-fe01-sp2013/sites/hard">http://srv-fe01-sp2013/sites/hard</a>	Active (3)	Essay 2	4/7/2016 6:00:00 PM	Not Started
Software Course (new)	<a href="http://srv-fe01-sp2013/sites/softn">http://srv-fe01-sp2013/sites/softn</a>	Ready To Review (0)	essay	4/13/2016 12:00:00 AM	Not Started
Barista Starcups	<a href="http://srv-fe01-sp2013/sites/star">http://srv-fe01-sp2013/sites/star</a>	Overdue (0)	Report	4/20/2016 12:00:00 AM	Not Started
Computers and Technology Course	<a href="http://srv-fe01-sp2013/sites/rew">http://srv-fe01-sp2013/sites/rew</a>	Closed (0)			
		Due Today (0)			
		Due This Week (1)			
		Due Next Week (1)			
		All Assignment (3)			

In Grid View Assignments are organized according to their status:



- Active – displays a list of active assignments (Start date reached, End date not overdue);
- Ready to Review – displays a list of assignments completed by Learners. The list of assignments consists of returned and not approved tasks;
- Overdue – displays a list of assignments where End date has passed. The list of assignments contains not returned and not approved tasks;
- Closed – displays a list of assignments where Closing Date has passed. The list of assignments contains overdue and not approved tasks;
- Due Today – displays a list of assignments which have the current day as the End date. The list of assignments consists of not returned and not approved tasks;
- Due This Week – displays a list of assignments which have the current day as the End date and all assignments up to the upcoming Saturday. The list of assignments consists of not returned and not approved tasks;
- Due Next Week – displays a list of assignments which have the current day as the End date, assignments up to the upcoming Saturday and all assignments for the 7 days following Saturday. The list of assignments consists of not returned and not approved tasks;
- All Assignments – displays all available assignments. The list of assignments consists of not returned and not approved tasks.

Numbers in brackets indicate the number of assignment with corresponding status.

**NOTE:** Only published Assignments are displayed in this view.

In Calendar View Assignments are shown as in LMS Assignments section:

## Assignments

Select User:   

Current View: Calendar ▾

Title	URL
Hardware Course	<a href="http://srv-fe01-sp2013/sites/hard">http://srv-fe01-sp2013/sites/hard</a>
Software Course (new)	<a href="http://srv-fe01-sp2013/sites/softn">http://srv-fe01-sp2013/sites/softn</a>
Barista Starcups	<a href="http://srv-fe01-sp2013/sites/star">http://srv-fe01-sp2013/sites/star</a>
Computers and Technology Course	<a href="http://srv-fe01-sp2013/sites/rew">http://srv-fe01-sp2013/sites/rew</a>

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SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
27	28	29	30	31	1	2
3	4	5	6	7	8	9
			Report			
			essay			
			Essay 2			
10	11	12	13	14	15	16
			Report			
	essay					
17	18	19	20	21	22	23
	Report					
24	25	26	27	28	29	30

To open course in a new browser tab click the URL of the course.

### 5.3.2.10 View User's Announcements

**NOTE:** By default this menu item is hidden. To display it, edit the 'Announcements' link as described in the [Navigation](#) section.



In this section manager can view all announcements made for user selected in My Staff or in Profile.

To view announcements of a certain user, do the following:

1. Select the needed user using Select User field;
2. Click the Title of the needed course from the list.

You can choose between Grid and Calendar view for the announcements:

## Announcements

Select User:    Current View: **Grid** ▾

Title	URL	Title	Body
Hardware Course	<a href="http://srv-fe01-sp2013/sites/hard">http://srv-fe01-sp2013/sites/hard</a>	New Courses	Starting soon!
Software Course (new)	<a href="http://srv-fe01-sp2013/sites/softn">http://srv-fe01-sp2013/sites/softn</a>	New Teachers	Mr. Henderson and Mr. Ninelash
Barista Starcups	<a href="http://srv-fe01-sp2013/sites/star">http://srv-fe01-sp2013/sites/star</a>	Important information	See new material in the attached files.
Computers and Technology Course	<a href="http://srv-fe01-sp2013/sites/rew">http://srv-fe01-sp2013/sites/rew</a>		

In Grid View announcements are displayed in table with four columns:

- Title – title of an LMS course;
- URL – URL of a course;
- Title – name of the announcement;
- Body – Text of the announcement.

In Calendar View Announcements are shown as in LMS Announcements section:

# Announcements

Select User:



Current View: **Calendar** ▾

Title URL

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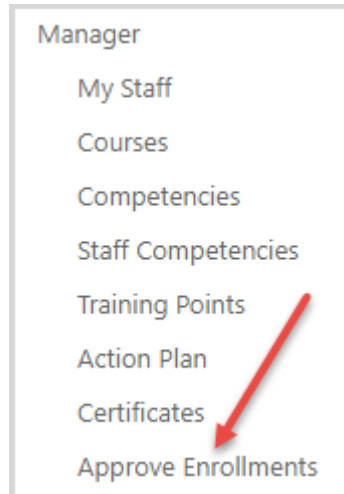
Title	URL
Hardware Course	<a href="http://srv-fe01-sp2013/sites/hard">http://srv-fe01-sp2013/sites/hard</a>
Software Course (new)	<a href="http://srv-fe01-sp2013/sites/softn">http://srv-fe01-sp2013/sites/softn</a>
Barista Starcups	<a href="http://srv-fe01-sp2013/sites/star">http://srv-fe01-sp2013/sites/star</a>
Computers and Technology Course	<a href="http://srv-fe01-sp2013/sites/rew">http://srv-fe01-sp2013/sites/rew</a>

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
27	28	29	30	31	1	2
3	4	5	6	7	8	9
Important information						
New Courses						
New Teachers						
10	11	12	13	14	15	16
Important information						
New Courses						
New Teachers						
17	18	19	20	21	22	23
Important information						
New Courses						
New Teachers						
24	25	26	27	28	29	30
Important information						
New Courses						
New Teachers						

To open course in a new browser tab click the URL of the course.

### 5.3.2.11 Approve Enrollments

Approve Enrollments link redirects Manager to the [Enrollment Requests List](#):



<b>NOTE:</b>	Line Manager sees requests of his subordinates and can approve or reject them, and sees his own requests but cannot approve or reject them. HR/Relationship managers see only their own requests and cannot approve or reject them.
<b>NOTE:</b>	To see this link on the old Dashboards, you need to Revert to default DB's navigation (go to Dashboard > Site Settings > Navigation > Revert to default).