LMS ADMIN GUIDE

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Getting Started

Getting Started - Introduction

What is the Accord LMS?

The Accord Learning Management System (LMS) allows you to deliver critical and up-to-date online training when you need it - now! You can focus on education instead of administration. The LMS is available as a DNN Module Set or as a turn-key LMS Portal.

Accord LMS is a SCORM compliant Learning Management System. When used with rapid content creation tools, you can deliver a functional and complete training portal within days not weeks.

There are several **Feature Sets** (modules) available in the Accord LMS: LMS Administration, LMS Learner and LMS Reports. This user guide focuses on the LMS Administration Module.

LMS Admin Responsibilities

As an Accord LMS Admin, it is your responsibility to set up and maintain the Learning Elements, organize and enroll Learners and utilize the various tools and configurations within the LMS Admin Module.

As an LMS Admin you can:

- Upload and organize SCORM compliant presentations and quizzes.
- Use the Catalog feature to build hierarchical course folders and organize content via drag and drop actions.
- Assign Learning content to Roles and Learners with powerful enrollment functions.
- Configure Learner presentation options and various LMS feature access.
- Manage and communicate with your Learners and get status updates on their activity.

Other responsibilities may include determining course prerequisites, dropping Learning Roles or Learners from assigned enrollments, license administration, etc.

This guide provides overviews and step-by-step information to help you work effectively as an LMS Admin within the LMS Administration Module.

Before You Begin

Here is a short checklist you should review before you dive into the LMS Administration Module:

- Save a copy of your license for future reference (if needed).
- Use appropriate SCORM compliant output settings in your third-party authoring tools when generating your Learning content.
- Organize your Learning content (SCORM Learning Elements (LE) and Non-SCORM LE for upload to your LMS).

System Requirements

Client Browser Requirements

Supported Browsers and Computer Platforms

For LMS access and utilization, for both administrators and learners:

- Firefox 31+
- Google Chrome 49+
- Internet Explorer 11+
- Microsoft Edge 38
- Safari 9+
- Android 4.4.2+

Notes:

- No additional browser plug-ins or runtimes are required for accessing and using Accord LMS.
- Note: There may be other requirements necessary to view some of the Learning content such as Flash, which may vary depending on the third-party Authoring Tool used to create it. Please check with the tool vendor for specific details.

Server Requirements (for self-hosted clients)

Hardware Requirements

For up to 10,000 Learners

- CPU: Intel® Xeon® Processor E7-4809 v2
- RAM: 32 GB
- Storage: 100 GB

For up to 50,000 Learners

- CPU: Intel® Xeon® Processor E7-4890 v2
- RAM: 64 GB
- Storage: 150 GB

For up to 100,000 Learners

- CPU: 2 x Intel® Xeon® Processor E7-4890 v2
- RAM: 128 GB
- Storage: 200 GB

For over 100,000 Learners

- Please contact our Sales team to better evaluate your needs.

Note:

Storage requirements may be higher for clients providing a large amount of SCORM and / or Video learning content.

Software Requirements

Please see: http://www.dnnsoftware.com/platform/start/install#2047

Module Installation and Setup

Review the [Accord LMS - Quick Start for Self-Hosted Self-Installed guide.](#) It will guide you through the installation procedure (if self-hosting) and initial setup. Refer to the [Accord LMS - Getting Started Guide](#) for complete details on how to get a fully functioning Training program online.

Accord LMS Access

Accord LMS Access - Introduction

The first approach to your LMS always begin with the user registration process. Your Portal can be fully customized not only to request and show any information you need or like but you can also choose which type of registration process you want to use. From this moment you can also use the registration process to include and execute access codes which can grant different permission set but also enroll content to your learners. In the following sections, you will be present with some of the options available.

Registration Options
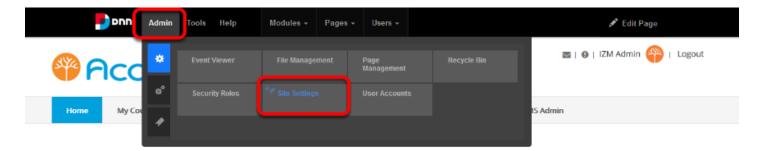
The User Registration screen of your DNN portal can be fully customized to suit your security needs and give you more detailed information about your Accord LMS Learners.

Registration Options are accessed when clicking Register on the LMS landing page.

In order to customize or review the registration screen used by your DNN portal:

- Navigate to **Admin** > **Site Settings.**

- Click on **User Account Settings** tab to make it active.

There are four types of User Registrations allowed on your site:

- **None:** This option removes the registration link from your website. The administrators of your website can only add new users manually.
- **Private:** The register link appears. When a user registers, the administrators have to approve the user before the user will be granted access.

- **Public:** This is the default setting for your DNN portal. The register link appears. When a user registers they are given instant access to your site as a member without any verification.
- **Verified:** The registration link appears. When a user registers they are sent an email with a verification code. The first time they log in they are asked to enter the verification code. If verified they are given access to your site as a member. Once verified they no longer need to enter the verification code.

The verified option is useful if you want to send a newsletter to your website members. This allows you to ensure that the email address entered by your members is valid.

DNN automatically alters the text displayed when a user is registering, depending on the registration option that you chose, the registration message will display:

Private:

Note: Membership to this website is Private. Once your account information has been submitted, the Website Administrator will be notified and your application will be subjected to a screening procedure. If your application is authorized, you will receive notification of your access to the website environment. All fields marked with a red asterisk are required. - (Note: - Registration may take several seconds. Once you click the Register button please wait until the system responds.)

Public:

Note: Membership to this website is Public. Once your account information has been submitted, you will be immediately granted access to the website environment. All fields marked with a red asterisk are required. - (Note: - Registration may take several seconds. Once you click the Register button please wait until the system responds.)

Verified:

- **Receive user registration notification:** Enables website administrator to receive an email notification during new user registration.
- **Use Authentication Providers:** Select this option to use Authentication providers during registration. Note that not all providers support this option.
- **Excluded Terms:** Allows you to define a comma-delimited list of terms that a user cannot use in their Username or Display Name.
- **Use Profanity Filter:** Selecting this option will enforce the profanity filter for the UserName and Display Name during Registration.

Standard Registration

Registration Form Type: Select the type of Registration Form that you want to use (Standard is selected in the examples below).

- **Use Email Address as Username:** Check this option to use the Email Address as a user name. If this is true, the user name entry field is not shown in the registration form.
- **Require Unique Display Name:** You can optionally require your users to use a unique display name. If a user chooses a name that exists already this will suggest a modified name.
- **Display Name Format:** You can optionally specify a format for the user's display name. The format can include tokens for dynamic substitution such as [FIRSTNAME] [LASTNAME]. If a display name format is specified, the display name will no longer be editable through the user interface.
- **User Name Validation:** Add your own Validation Expression, which is used to check the validity of the user name provided. If you change this from the default you should update the message that a user would see when they enter an invalid user name using the localization editor. (SharedResources.resx - Username.RegExError)
- **Email Address Validation:** You can modify the provided Email Validation Expression, which is used to check the validity of email addresses provided.
- **Use Random Password:** Check this box to generate random passwords during registration, rather than displaying a password entry field.
- **Require Password Confirmation:** Check this to require the registration form to display a password confirmation box.
- **Use CAPTCHA for Registration:** You can optionally require that a new user enters a valid profile during registration.

The following fields can only be changed in the DNN **web.config** file.

- **Password Format:** Password will be Clear, Hashed or Encrypted.
- **Password Retrieval Enabled:** Specifies whether or not a user can request their password to be sent to their email.
- **Password Reset Enabled:** Specifies whether or not a user can request their password to be reset.
- **Min Password Length:** Specifies the minimum number of characters in the password.
- **Min Non Alphanumeric Characters:** Specifies the minimum number of special characters in the password.
- **Requires Question And Answer:** Specifies whether a question and answer system is used as part of the registration process.
- **Password Strength Regular Expression:** The regular expression used to evaluate password complexity from the provider specified in the Provider property.
- **Max Invalid Password Attempts:** Specifies the number of times the wrong password can be entered before account is locked.
- **Password Attempt Window:** Specifies the length of time an account is locked after failed login attempts.

- **Require a valid Profile for Registration:** You can optionally require that a new user enters a valid profile during registration.
- **Use CAPTCHA for Registration:** Indicate whether this site should use CAPTCHA for Registration.
- **Redirect After Registration:** You can select a page to redirect the user to, on successful registration.

Custom Registration

Registration Form Type: Select the type of Registration Form that you want to use (Custom is selected in the examples below).

- **Registration Fields:** You can specify the list of fields you wish to include as a comma-delimited list. If this setting is used, this will take precedence over the other settings. The possible fields include User name, Email, Password, Confirm password, Display name and all the Profile Properties.
- **Require Unique Display Name:** You can optionally require your users to use a unique display name. If a user chooses a name that exists already this will suggest a modified name.
- **Display Name Format:** You can optionally specify a format for the users display name. The format can include tokens for dynamic substitution such as [FIRSTNAME] [LASTNAME]. If a display name format is specified, the display name will no longer be editable through the user interface.
- **User Name Validation:** Add your own Validation Expression, which is used to check the validity of the user name provided. If you change this from the default you should update the message that a user would see when they enter an invalid user name using the localization editor. (SharedResources.resx - Username.RegExError)
- **Email Address Validation:** You can modify the provided Email Validation Expression, which is used to check the validity of email addresses provided.

- **Requires Unique Email:** If this is checked then each user will be required to provide a unique Email address. This means that a user cannot register multiple times with the same email address.
- **Password Expiry (in days):** The number of days before a User must change their password (value of 0 means the password never expires).
- **Password Expiry Reminder (in days):** The number of days warning the user will receive that their password is about to expire.

Once finished performing all the changes to the Registration Process, click/tap **Update** to save the modifications.

User Registration

Learners may be required to register for membership in the **Accord LMS**. This chapter provides some basic instructions for submitting your registration information to the System Administrator.

- Open your browser and type the path to your **Accord LMS portal page** in the address line.
- Click the **Register** link.

- The **User Registration** page displays.

- Complete all the required fields and any other optional information your administrator may have requested.
- Click the **Register** link to submit your registration information. Click **Cancel** to cancel the registration.
- Once registered, you will have four different ways to gain access to the LMS portal which will include:
    - **Immediate Access:** All you have to do is register.
    - **Authorized:** After you register, you will receive an authorization email which validates the email address provided during registration.
    - **Private:** After you register, an LMS Admin will review and approve your submission. If accepted, you will receive an authorization email which then allows you to log in.
    - **Account creation by an LMS Admin:** You will not have to register; this will be done for you.

Login

You will need a web browser in order to log into your company's Accord LMS. The Accord LMS supports single login functionality so if you log into your network, it may not be necessary to log in again to the LMS.

Before you can access the LMS Administration Module, your System Administrator should provide you with the following information:

- The web address to your company's Accord LMS portal (home) page.
- Your LMS Admin User Name and Password (you may need to register first).
- Any related license information.

Login to Your Accord LMS

- Click the **Login** link.

On the login page;
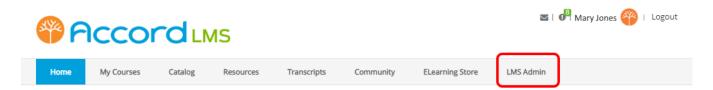
- Type your **Username** in the field provided.
- Type your **Password** in the field provided.
- Click the **Login** button.

After you log in, access the **LMS Administration Module**.

In many cases an **LMS Admin** link will display allowing quick access.

Password Recovery
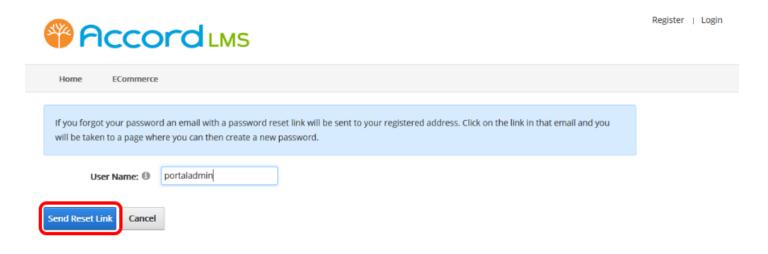
If a Password has been lost or forgotten, a new Password can be created by using the **Reset Password** link.

The reset password link is temporary and not reusable.
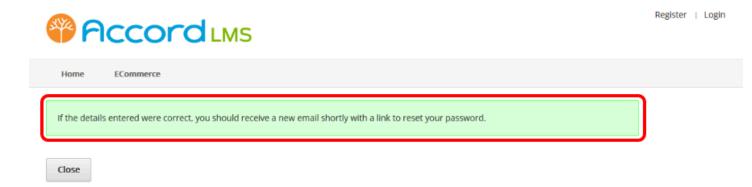
- Click the **Login** link from your LMS portal home page.
- On the login page, click the **Reset Password** link.

- You will be redirected to a page requesting your username.
- Type your **User Name** in the field provided.
- Click **Send Reset Link**.

If the username is identified, a success message displays.

Accord LMS

Home   ECommerce

If the details entered were correct, you should receive a new email shortly with a link to reset your password.

Close

Check email for new password information and save in safe place.

Accord LMS

Certified Authoring Tools

Introduction - Certified Authoring Tools

Please see the [Certified Authoring Tools](#) section in the Appendix for a list of SCORM compliant authoring tools certified for use with the Accord LMS. If you do not see your preferred tool in the list, please contact support@accordlms.com and we will certify the tool for you.

If you require more information on any of the technical specifications covered in this chapter, please review the various Appendix documents.

Assessment and Survey Authoring Tools

The Assessment Authoring Tool is an integrated Question Builder that allows LMS Admin to design quizzes or exams for their Learners without the need of any external tool or application. Admins may create a simple quiz or an assessment which is more complex. To ensure your content is being properly administered to your Learners, the assessment tool allows for corrective feedback. Learners may answer assessments by various methods such as multiple choice, matching, true/false and yes/no.

Creating an Assessment
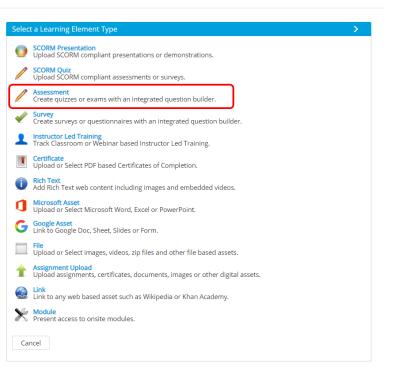
Assessments, like any Learning Element, can be added to any folder or course.

- Ensure the proper **Active Team** has been selected by using the associated dropdown menu.
- Navigate to the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the folder you wish to add the new assessment to open it's context menu.
- Select **New Learning Element**.

- Click on **Assessment**.

- **Name:** A name is required before proceeding to the quiz builder section.
- Input a **Passing Score** using a numeric value between 0 and 100.
- Click the **Question Builder** button.

The Question Builder Section will display. This section allows you to add the questions and answers that will be integrated into your assessment. Questions are arranged as part of Groups

as a way of organizing topic related questions under one particular heading or section. Groups can be re-organized or have a limited number of questions to be asked. You also have the ability to import questions from another quiz or an external .csv file.

- **Group Name:** Give this group a name to help you identify the type of questions.
- **Questions to ask:** You can show **all** questions or set a **limited number** of questions to be asked.

- **Question:** Type in the question that will be presented to the Learner.
- **Required:** If marked as required, this question will always be included in the question group even if there is a limited number of Questions.
- **Weight:** Allows you to set a relative weight for this question compared to the total. For example, if you have a total of 8 points distributed in your questions, and you set this question weight as 2, it will be counted as 25% of the total score.
- **Type:** Multiple Choice: Learners will be shown all options and be able to select a single answer or multiple answers. True or False: Learners will have the option between either answer and be able to select only one. Yes/No: Learners will have the option between either

answer and be able to select only one. Text: Learners will be asked to enter a text response which will be matched against a pre-set answer.

- **Correct Feedback:** You can provide feedback which explains why the Learner's response is correct.
- **Incorrect Feedback:** You can provide feedback which explains why the Learner's response is incorrect.

Enter any answer that you prefer for this question.

- Click **Add New Answer**.

You can **reorganize** the different answers by using the control on the upper left of each answer box or you can **delete** any answer by clicking the red cross in the upper right corner.

Additionally, you can include images for each question that helps exemplify the question or is necessary for the Learner to answer the question.

• Click the **Upload a File** control.

- Click the **Add New Question** button to add more questions to this group.

Your quiz can have different types of questions in the same group. In the example below we include a True or False question type which integrates perfectly within the same group. The True and False answers will be auto-generated to indicate which answer is correct.

You can add any number of question groups needed.

- Click the **Add New Question Group**.

You can also Import Questions from other quizzes, either from an 'Existing Group' or from a previously saved comma delimited (.csv) file.

- Click **Import Questions**.

If importing questions from an 'Existing Group', select the group from the drop-down. If your questions are included in a CSV File, use the Browse button to locate and upload the file.

- After the selection is made, click the **Import** button to process the information.

A sample Assessment .csv file can be found at the end of this article.

A confirmation message will display indicating the number of successful records imported.

- Click **OK**.

The Question Group will populate with the imported data. You can add further questions, import more questions, add a new group of questions or proceed to create the assessment.

- Once you have finished adding content, click **Update** to save your changes.

Advanced Settings

The Advanced Settings section allows you to fully control the utilization tracking of your assessments and surveys, when to display question and answer feedback, select the completion behavior, and even randomize the order in which the questions and answers are displayed across the different instances of the quiz.

To access the Advanced Settings section:

- Click the **down arrow**.

- **Learning Element Type:** Shows the Type of the Learning Element that is being edited. This field is automatically populated based on the option chosen in the initial step of the Learning Element creation. You can select another Learning Type from the drop-down but please notice that converting from Assessment LE Type will result in the loss of the Questions (they will be deleted) and may result in the loss of the Learning Element Detail Settings.
- **Learning Element Format:** Formats determine how your Learning Element is presented and processed. Please refer to the Learning Element Formats chapter of this guide for more information.
- **Utilization Tracking:** Provides you with several options on how the utilization of this Learning Element should be tracked. **Provided by Assessment**, will record the utilization status reported by the assessment. **None**, will not record any utilization. **None - Resource**, will also not record any utilization but the Learning Element will be treated as any other Resource Learning Element.
- **Randomize Question Order:** Questions will be displayed in a random order to each respondent.
- **Randomize Answer Order:** Answers will be displayed in a random order to each respondent.
- **Question Feedback:** Select how the Notifications and Feedback to the Learner at the completion of each Question will be handled. Options vary from Incorrect and Correct Notification to Correct and Incorrect Notification with feedback for both questions and answer.
- **Pass to Complete:** If Pass to Complete box is checked, then the Assessment must be Passed before it can be marked as Completed. If Pass to Complete is not checked, then the Assessment can be Completed even if it is Failed.
- **Custom Window Dimensions:** Allows to input custom values for width and height in which the Learning Element window will open.

- **Time Limit:** You can specify a limit of time in which your learners must complete the Assessment or Survey.
- **LEID:** This is the **unique** identification string (made up of alpha and numeric characters) assigned to the Learning Element once it has been added to the Catalog. It is used to identify the Learning Element. Initially, the LEID is **n/a** until is it added.
- **Local ID:** This is the value of a local Learning Element auto increment field and is a unique value within the portal assigned to a Learning Element after it is created. Until that occurs, it will be **n/a**.
- **Reference:** This is an optional **reference field** for administrative use. In most cases, you can leave this field blank.
- **Status:** Active Learning Elements are available for Learner utilization. Inactive Learning Element are hidden from Learner My Courses and Catalog.
- **Views:** This is a **dynamic** option that shows the number of times a Learning Element has been viewed.
- **Publish Date:** Enter a publish date in the field provided. The Learning Element will only be available from this date. You can also click the **Calendar** link to display a calendar. The date selected from the calendar will automatically fill in the Publish Date field.
- **Unpublish Date:** Unpublish Date for the Learning Element. The Learning Element will display until this date. You can also click the **Calendar** link and select a date from the calendar.
- **Tags (separated by commas):** Type in words or phrases to identify the Learning Element during a search. Separate each word or an entire phrase by a comma.
- **Utilized in Folders:** Shows a list of folders where this learning element is being used. Initially will be blank until the Learning Element is created.
- **History:** Shows a Registry of modifications made to the Learning Element.

Messages

In this section you can customize the Introduction, Pass and Fail messages that will be shown to the Learners while taking the assessment.

To access the Messages section:

- Click the **down arrow**.

In this section you will find three customizable text boxes that correspond to the main parts of most assessments.
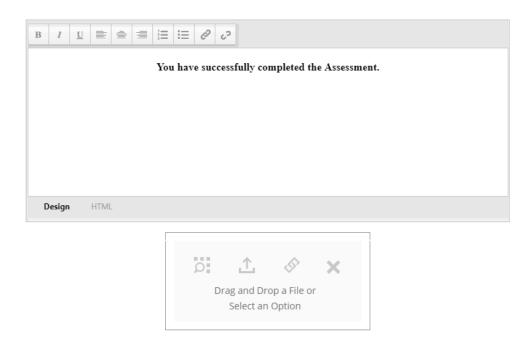
- **Introduction:** This will be presented to the Learner immediately after launching the Learning Element. You can use this section to give general instructions, objectives or indicate the passing score. Additionally, you can include images for better looks and understanding.

Introduction

| B | I | U | ≡ | ≡ | ≡ | ≔ | ≔ | 🔗 | 🔗 |

'Start' when you want or 'Cancel' if you are not ready.

Design   HTML

◫   ⬆   ⬦   ✕

Drag and Drop a File or
Select an Option
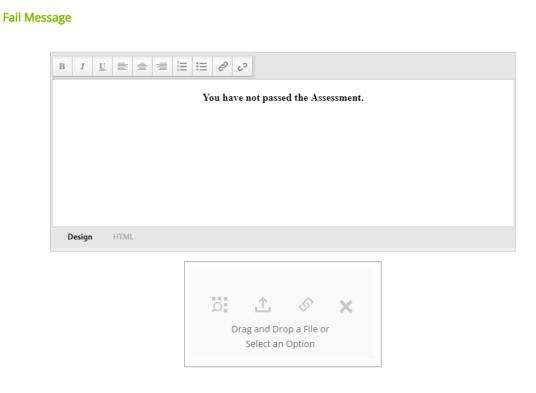
- **Pass Message:** This message will be displayed to those Learners that pass the assessment. It might be useful to provide some additional information or to congratulate for passing. Any information included in this text box can be followed by an image or graphic that emphasize the message.

Pass Message

| B | I | U | ≡ | ≡ | ≡ | ≔ | ≔ | 🔗 | 🔗 |

You have successfully completed the Assessment.

Design   HTML

◫   ⬆   ⬦   ✕

Drag and Drop a File or
Select an Option

- **Fail Message:** Message that will be shown when the assessment is not passed. This messages can be from a simply 'Try Again' to some more elaborated feedback.

Fail Message

Education Activities

This section allows you to specify requirements to award Education Units, based on Learner Attempt Records for all the Learning Elements specified.

- **Award Requirements:** Specify requirements to award Education Activities.
- **Education Units:** Total Amount of Education Units to be awarded to Learners. Standard Education Units are available in reports.

- Click **Update** to create the new Learning Element or to save the modifications to an existing one.

Education Activities

Award Requirements: ⓘ Complete and Pass ▾

Education Units: ⓘ 10

[Update] [Cancel]

Creating a Survey

The Survey authoring tool is very similar to the Assessment tool but it incorporates a Rating (Likert Scale) question type. Surveys are a good way of obtaining feedback from your Learners after they have taken a course or assessment. Surveys have no correct or incorrect answers.

Surveys, like any Learning Element, can be added to any folder or course.

- Ensure the proper **Active Team** is selected by using the associated dropdown menu; should more than one Active Team exist.
- Navigate to **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the folder you wish to add the new assessment to open it's context menu.
- Select **New Learning Element**.

- Click **Survey**.

New Learning Element

Select a Learning Element Type

SCORM Presentation
Upload SCORM compliant presentations or demonstrations.

SCORM Quiz
Upload SCORM compliant assessments or surveys.

Assessment
Create quizzes or exams with an integrated question builder.

Survey
Create surveys or questionnaires with an integrated question builder.

Instructor Led Training
Track Classroom or Webinar based Instructor Led Training.

Certificate
Upload or Select PDF based Certificates of Completion.

Rich Text
Add Rich Text web content including images and embedded videos.

Microsoft Asset
Upload or Select Microsoft Word, Excel or PowerPoint.

Google Asset
Link to Google Doc, Sheet, Slides or Form.

File
Upload or Select images, videos, zip files and other file based assets.

Assignment Upload
Upload assignments, certificates, documents, images or other digital assets.

Link
Link to any web based asset such as Wikipedia or Khan Academy.

Module
Present access to onsite modules.

Cancel

- Give the Survey a **Name.** This is required before proceeding to the quiz builder section.
- Click the **Question Builder** button.

Question Builder

Survey
Create surveys or questionnaires with an integrated question builder.

General Settings

Name: * ⓘ   Learner Satisfaction Survey

Description: ⓘ
 ○ Basic Text Box   ● Rich Text Editor

Design   HTML   Preview   Words: 0 Characters: 0

Questions: * ⓘ   0 Total

Question Builder

Version History: ⓘ

Advanced Settings

Messages

Education Activities

Update   Cancel

- **Group Name:** Name this group. This will help organize and identify the type of questions included.

- **Questions to ask:** You can show **all** questions or set a **limited number** of questions to be asked.

- **Question:** Type in the question that will be presented to the Learner.
- **Required:** If marked as required, this question will always be included in the question group even if there is a limited number of Questions to ask
- **Type:** Multiple Choice: Learners will be shown all options and be able to select a single answer or multiple answers. True or False: Learners will have the option between either answer and be able to select only one. Yes/No: Learners will have the option between either answer and be able to select only one. Text: Learners will be asked to enter a text response which will be matched against a pre-set answer. Rating (Likert Scale): Scaling responses are shown to your Learners where they can choose the most appropriate one.
- **Hide Option Values:** When checked it will hide the information included in the 'Option' field.
- **Option:**
- **Label:** Enter the option to be selected by the respondent.

Optionally, label the option set in the field right above. You could add some description to the value input, for example; Strongly Disagree, Disagree, Agree, Disagree, etc.

Add all the options that you would like to include.

- Click **Add New Option**.

You can **reorganize** the different options by using the control in the upper left corner of each Option box or you can **delete** any option by clicking the red cross on the upper right corner.

Additionally, you can include images for each question that helps exemplify the question or is necessary for the Learner to answer the question.

- Click the **Upload a File** control.

Your survey can have different types of questions in the same group. In the example below we include a Yes or No question type which integrates perfectly within the same group.

You can also Import Questions from other surveys, either from an 'Existing Group' or from a previously saved comma dellimited (.csv) file.

- Click **Import Questions**.

If importing questions from an 'Existing Group', select the group from the dropdown. If your questions are included in a CSV File, use the Browse button to locate and upload the file.

- After the selection is made, click the **Import** button to process the information.

A confirmation message will display indicating the number of successful records imported.

- Click **OK**.

The Question Group will populate with the imported data. You can add further questions, import more questions, add a new group of questions or proceed to create the assessment.

- Once you have finished adding content, click **Update** to save your changes.

Advanced Settings

The Advanced Settings section allows you to fully control the utilization tracking of your assessments and surveys, when to display question and answer feedback, select the completion behavior, and even randomize the order in which the questions and answers are displayed across the different instances of the quiz.

Messages

In this section you can customize the Introduction and Completion messages that will be shown to the Learners while taking the survey.

To access the Messages section:

- Click the **down arrow**.

Question Builder

Publish Date: ⓘ	26 Jul 2017 🖩
Unpublish Date: ⓘ	🖩
Tags (separated by commas): ⓘ	
Utilized in Folders: ⓘ	LMS Learner Training
History:	Created: IZMAdmin on 26 July 2017 at 4:08:37 PM
	Updated: IZMAdmin on 27 July 2017 at 12:00:52 PM

Messages ⌄

Education Activities ⌄

Update Delete Cancel

In this section you will find three customizable text boxes that correspond to the main parts of most assessments.

Introduction: This will be presented to the Learner immediately after launching the Learning Element. You can use this section to give general instructions or point out the objectives of the survey. Additionally, you can include images for better looks and understanding.

Introduction

Completion Message: Message that will be shown when the survey is completed. This messages can be from a simply 'You have completed the Survey', to some more elaborated ones.

Completion Message

To access the Advanced Settings section:

- Click the **down arrow**.

- **Learning Element Type:** Shows the Type of the Learning Element that is being edited. This field is automatically populated based on the option chosen in the initial step of the Learning Element creation. You can select another Learning Type from the drop-down but please notice that converting from Survey LE Type will result in the loss of the Questions (they will be deleted) and may result in the loss of the Learning Element Detail Settings.
- **Learning Element Format:** Formats determine how your Learning Element is presented and processed. Please refer to the Learning Element Formats chapter of this guide for more information.
- **Utilization Tracking:** Provides you with several options on how the utilization of this Learning Element should be tracked. **Provided by Survey**, will record the utilization status reported by the survey. **None**, will not record any utilization. **None - Resource**, will also not record any utilization but the Learning Element will be treated as any other Resource Learning Element.
- **Randomize Question Order:** Questions will be displayed in a random order to each respondent.
- **Randomize Answer Order:** Answers will be displayed in a random order to each respondent.
- **LEID:** This is the **unique** identification string (made up of alpha and numeric characters) assigned to the Learning Element once it has been added to the Catalog. It is used to identify the Learning Element. Initially, the LEID is **n/a** until is it added.
- **Local ID:** This is the value of a local Learning Element auto increment field and is a unique value within the portal assigned to a Learning Element after it is created. Until that occurs, it will be **n/a**.
- **Reference:** This is an optional **reference field** for administrative use. In most cases, you can leave this field blank.
- **Status:** Active Learning Elements are available for Learner utilization. Inactive Learning Element are hidden from Learner My Courses and Catalog.

- **Views:** This is a **dynamic** option that shows the number of times a Learning Element has been viewed.
- **Publish Date:** Enter a publish date in the field provided. The Learning Element will only be available from this date. You can also click the **Calendar** link to display a calendar. The date selected from the calendar will automatically fill in the Publish Date field.
- **Unpublish Date:** Unpublish Date for the Learning Element. The Learning Element will display until this date. You can also click the **Calendar** link and select a date from the calendar.
- **Tags (separated by commas):** Type in words or phrases to identify the Learning Element during a search. Separate each word or an entire phrase by a comma.
- **Utilized in Folders:** Shows a list of folders where this learning element is being used. Initially will be blank until the Learning Element is created.
- **History:** Shows a Registry of modifications made to the Learning Element.

Education Activities

This section allows you to specify requirements to award Education Units, based on Learner Attempt Records for all the Learning Elements specified.

- **Award Requirements:** Specify requirements to award Education Activities.
- **Education Units:** Total Amount of Education Units to be awarded to Learners. Standard Education Units are available in reports.

Education Activities   ∧

Award Requirements: ⓘ   Complete and Pass ▾

Education Units: ⓘ   10

[Update] [Cancel]

- Click **Update** to create the new Learning Element or to save the modifications to an existing one.

Education Activities   ∧

Award Requirements: ⓘ   Complete and Pass ▾

Education Units: ⓘ   10

[Update] [Cancel]

Integrated Third-Party Authoring Tools

Best of Class

Authoring tools are used to create Learning Elements. Learning Elements are the presentations and quizzes that fill out your folders and courses. Different authoring tools provide different features and strengths. Rather than relying on a single built-in authoring tool with limited functionality, the Accord LMS integrates with any number of third-party tools. This has several advantages:

- You can select the Best of the Class tool for creating the content type most appropriate for your training needs.
- You can choose to publish your content to the Accord LMS, directly to the web or to DVD (depending on the authoring tool).
- You maintain ownership of your question bank and resources.

In the example below we use products from iSpring Solutions, although many other tools may be used as well.

Requirements

- An **Authoring Tool** such as iSpring Presenter or Suite. You may download a trial version of the iSpring products here: iSpring Downloads.
- You must possess **LMS Administrator** access to your Accord LMS portal.
- **FTP Account Credentials** in order to directly access your Accord LMS bulk SCO upload folder. Contact Accord LMS Support at: support@accordlms.com to request the FTP account credentials.

Note: For comprehensive instructions for any of the authoring tools, please utilize the iSpring Tutorials or Support by clicking on the appropriate icons in the product UI.

Create an iSpring Quiz

- Open **Quizzes**.
- Select **Graded Quiz**.

For the purpose of illustrations here, we will create an example quiz titled 'Tire Safety'.
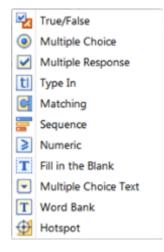
Write a title for the quiz in the field provided.

On the upper left portion of the screen click on **Graded Question**.

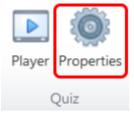Select question type. (In this example we use **True/False**).

- Write the question in field provided.
- Select correct response.

Near the bottom of the screen there are **Options** as well as **Feedback and Branching** tabs. These may be used to set points awarded for each question and display specific subsequent questions based on Learners' responses.
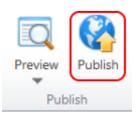

In the **Quiz** section of the top ribbon, you may select **Properties** to further design and customize a quiz. This is also where a passing score is set.

Publish the iSpring Quiz

When satisfied with the design and settings of a quiz, click **Publish**.

The Publishing Settings will display.

- Ensure the **LMS** tab on the left is selected.

- Select the **General** tab:
- In the **Quiz title** field: Enter the title of your quiz.
- In the **Local Folder** field: Browse to select the folder where you wish to save the quiz to a local PC.
- For **Output**: Select **Combined (Flash + HTML5)**.
- Check **Zip output**.

- **Compression**: The settings as seen below are typical for an ordinary presentation. You may select other settings to customize.

- **Advanced**: The settings as seen below are typical for an ordinary presentation. You may select other settings to customize.

Learning Course: For **Type**: Set as **SCORM 2004 - 4th Edition**.

- When all settings have been defined, click **Publish**.
- After the quiz has been published it may be uploaded to an Accord LMS portal.

FTP Upload the iSpring Quiz to Accord LMS

Immediately after publishing, the **Quiz Preview** will display. If you wish to upload the quiz via FTP to an Accord LMS portal, click **Upload to FTP**.

An **Upload to FTP** window will open. Select **New** if you need to setup your FTP account. Otherwise, select from the FTP Account list.

- Enter your FTP account information you received from Accord LMS Support.
- Check **Use encrypted connection via SSL/TLS**.
- The Field for **Folder on FTP server:** should be left blank.
- The numerical value for **Port:** should be left as default (normally 21).
- When the information has been entered correctly, click **Test**. If it displays a success message then FTP is working.
- Click **OK**.
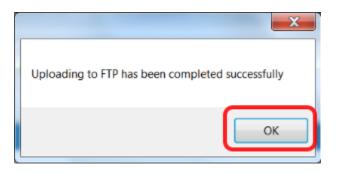

Your FTP account information is now entered and working properly. It will not need to be entered again.
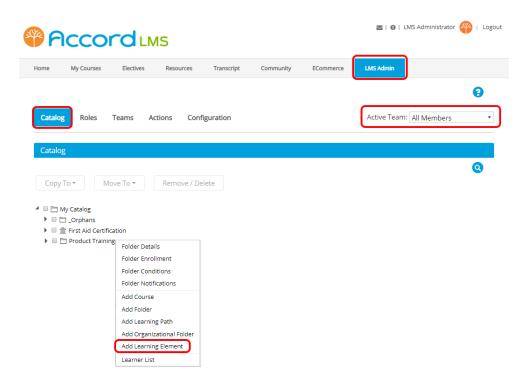
- Click **Upload**.

An **Uploading to FTP has been completed successfully** message will display.

- Click **OK**.

Create a Learning Element with the iSpring Quiz

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to **LMS Admin** tab.
- Click on the **Catalog** tab.
- Select the Folder where you wish to place the new Learning Element and click to open it's context menu.
- Select **Add Learning Element.**

The **New Learning Element** window opens. Scroll down and you will see the quiz uploaded via FTP displays in the Learning Element drop-down menu.

- Click on **Unpack Preloaded SCO ZIP Package**.
- Scroll to the top and enter the title of the Learning Element.
- Scroll back down and select the proper **Learning Element Type** from the dropdown menu.
- When finished, scroll to the bottom and click **Update**.

You will now see the quiz Learning Element displayed in the Learning Element folder.
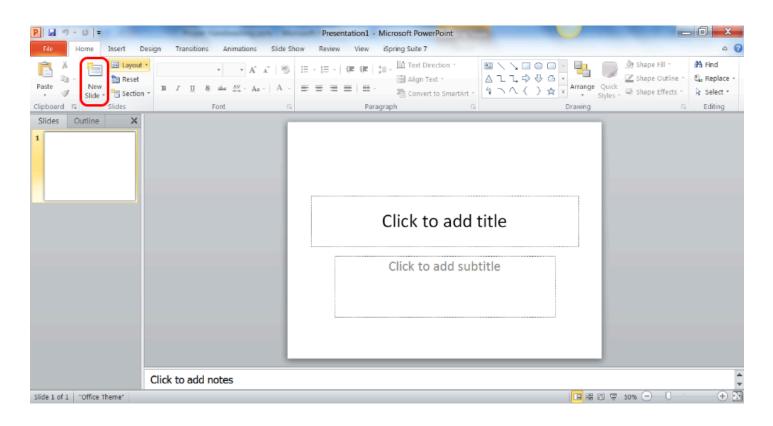

Create an iSpring Course

- Open **Courses**.
- Select **Create Course**. This will open the PowerPoint program.

For the purpose of illustrations here, we will create an example course titled "Proper Hand Washing".

Create a PowerPoint Presentation

- Add text, images and other media of your choosing to a slide.
- Select **New Slide**, when you want to add another slide to the presentation.
- You may click on the small blue question mark icon in the upper right hand portion of the screen for on-line PowerPoint program help or you may contact iSpring Support for assistance.

Publish the iSpring Course

- When ready to publish, click on the top **iSpring** tab.
- Select **Publish**.

The **Publish Presentation** settings will display.

- Ensure the LMS tab on the left is selected.

- Select the **General** tab.
- In **Presentation title** field: Name your PowerPoint Course.
- In **Local folder** field: Browse to select the folder where you wish to save the PowerPoint course to a local PC.
- Select **Combined (Flash + HTML5)**.
- **Player** will typically be set for **Universal (Full)**, unless you choose to Customize.

- **Playback and Navigation**: The settings as seen below are typical for an ordinary presentation. You may select other settings to customize.

- **Compression**: The settings as seen below are typical for an ordinary presentation. You may select other settings to customize.

- **Advanced**: The settings as seen below are typical for an ordinary presentation. You may select other settings to customize.

- **Protection**: No settings are necessary for this tab. You may choose to set for PowerPoint course data protection if desired.

- **Learning Course**: For **Type**: Set as **SCORM 2004 - 4th Edition**.

- When all settings have been defined, click **Publish**.
- After the PowerPoint course has been published, it may be uploaded to an Accord LMS portal.

FTP Upload the iSpring Course to Accord LMS

- When Publishing is complete, a **Presentation Preview** will open.
- Here there is an option to **Upload to FTP**.
- If you want to immediately upload the PowerPoint course via FTP to your Accord LMS portal, click on **Upload to FTP**.

An **Upload to FTP** window will open. Select **New** if you need to setup your FTP account. Otherwise, select from the FTP Account list.

- Enter your FTP account information you received from Accord LMS Support.
- Check **Use encrypted connection via SSL/TLS**.
- The field for **Folder on FTP server:** should be left blank.
- The numerical value for **Port:** should be left as default (normally 21).
- When the information has been entered correctly, click **Test**. If it displays a success message then FTP is working.

- Click **OK**.

Your FTP account information is now entered and working properly. It will not need to be entered again.

- Click **Upload**.

An **Uploading to FTP has been completed successfully** message will display.

- Click **OK**.

Create a Learning Element with the iSpring Course

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to **LMS Admin tab.**
- Click on the **Catalog** tab.
- Select the Folder where you wish to place the new Learning Element and click to open it's context menu.
- Select **Add Learning Element.**

The **New Learning Element** window opens. Scroll down and you will see the PowerPoint course uploaded via FTP, now displays in the Learning Element drop-down menu.

- Click on **Unpack Preloaded SCO ZIP Package**.
- Scroll to the top and enter the title of the Learning Element.
- Scroll back down and select the proper **Learning Element Type** from the drop-down menu.
- When finished, scroll to the bottom and click **Update**.

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You will now see the PowerPoint Learning Element displayed in the Learning Element folder.

LMS Admin Overview

The LMS Administration Module

The **LMS Administration Module** is a particular Feature Set of the Accord LMS.

It provides most of the LMS Administrative features as well as containing a **Configuration Tab** to facilitate the easy management of various LMS features and options; up to and including being able to import various forms of digital data and the ability to integrate with other online digital systems.

Login to Your Accord LMS

As an LMS Admin, once you log into the Accord LMS, you can then access the **LMS Administration Module**.

In many cases you will see an **LMS Admin** tab which you can click on to navigate thru the various Admin Features.

Navigation Buttons and Links

Since aesthetics and navigational designs of different pages may vary depending on specific skins and installations, certain images utilized throughout this manual may vary in appearance from your particular LMS.

Any instructions for the various features and tools are the same regardless of aesthetics.

Information Icons

As you work with various management features you will frequently encounter small **information icons** next to various fields and options.

Mousing over an information icon will display helpful tips.

On-Page Help Icons

On-Page Help Icons will provide additional information to help perform certain tasks or possibly link with other types of information when navigating thru different areas of the LMS.

- Click the **blue question mark** icon to display helpful information or access various links.

A **More Information** link may display, allowing access to online documentation for further examples or explanations.
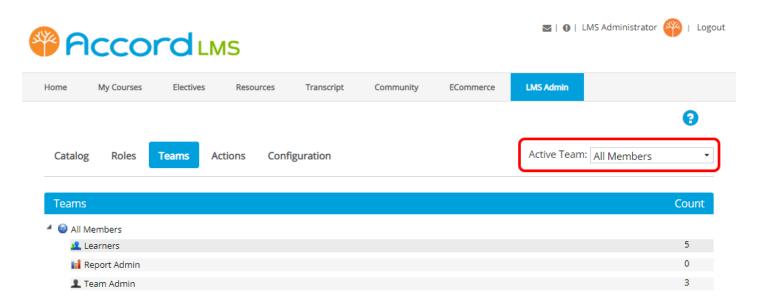
Catalog   Roles   **Teams**   Actions   Configuration

Active Team: All Members

Active Team

The **Active Team** dropdown menu allows you to quickly switch between different Teams; should more than one Active Team exist.

When selecting a specific **Active Team**, this pre-filters all Learners, any Learning Elements as well as establishes any defined LMS Admin permissions for various LMS administrative features.

Select the appropriate **Active Team** when working with segmented groups of Learners or Clients.

The LMS Administration Module - Tab Sections

Ensure the proper **Active Team** is selected; should there be more than one Active Team.

All **LMS Administration Module** content is pre-filtered based on established access permissions set for the selected Active Team.

An individual acting as an LMS Admin can access Learners, Learning Elements or any LMS Admin Features which may have been assigned to them through their Active Team.

Depending on a given Active Team, some tabs and features might vary or be hidden.

Each different Tab will contain a top-level page and sometimes numbers of sub-pages which contain tab-specific features and tools.

Available tabs may include but are not limited to; the **Catalog Tab**, **Roles Tab**, **Teams Tab**, **Actions Tab** and **Configuration Tab**.

Learning Catalog

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Click on the **Catalog** tab.

The Learning Catalog is where the various learning objectives and learning content is located and organized.

Catalog organization takes place through the creation of hierarchical folder structures using **Parent Folders** and **Child Folders**.

Learning Elements and Learning Folders

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Click on the **Catalog** tab.

The various types of Learning Content is referred to as **Learning Elements**.

Learning Elements will typically be segmented into various **Learning Catalog Folders** in order to facilitate their effective administration and usage.

The concept is straightforward;

- **Place Learning Elements into Learning Folders.**
- **You may then further assign certain details or certain conditions for these Learning Elements.**

This allows easy management of LMS Learner activity, compliance and progress.

Any activity, compliance and progress can be quantified, qualified and summarized through various types of reports when using the LMS Reports Feature.

Roles

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Click on the **Roles** tab.

Use can use the dropdown menu to **Filter by Role Group**.

Learning Roles are an efficient way to link specific courses to specific Learners.

You may add **New Role Groups** or **New Roles**. Roles and Role Groups are utilized in order to segment or segregate various types of Learners.

Here you can manage any Role Membership Rules in order to effectively automate the assignment and removal of selected Learning Roles based on a given Learner's progress or status.

Here you can set desired **Start Dates**, **Activation Dates**, **Due Dates**, **Expiration Dates** or **Renewal Dates**.

You may also set various types of **Notifications**.

Teams

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Click on the **Teams** tab.

LMS Admins have LMS administrative control over their assigned Learners.

Here you have the option of sending **Team Messages**.

In **Teams** you may manage or add various LMS Admin Types, manage Team Memberships, manage Learners or manage Learning Roles.

Actions

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Click on the **Actions** tab.

While under the **Actions** tab, you can use the **Action Panel** near the bottom to enroll or drop **Learning Roles** or **Learners** from selected **Learning Folders** or **Learning Elements**.

A feature exists which will allow you to identify any **Roles** or **Learners** which may be enrolled into selected **Learning Folders** or **Learning Elements**.

Easily create and delete any Learner attempt records.

Configuration

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Click on the **Configuration** tab.

Here you can configure general LMS options.

- Enable diagnostic SCORM traces and set additional parameters for data displayed in the **Actions** or **Catalog** tab.
- Add and update **Learning Element Formats** and **Status Types**.
- Customize any notifications and email templates.
- Review and configure certain enhanced features.
- Review the license key details and other related Accord LMS Portal information.

Tree Grid

Tree Grid - Introduction

The **Tree Grid** (or **Tree View**) is a drill-down folder structure which may contain Learning Content with options to expand and collapse hierarchical storage folders. This **Tree Grid** is utilized through the **LMS Admin** tab **> Catalog** or **Actions** pages.

Please ensure the proper **Active Team** is selected by using it's associated dropdown menu (should there be more than one Active Team).

Navigating the Tree Grid

An arrow symbol next to any of the folders within the Catalog Tree Grid allows you to expand or collapse it's contents (parent/child folders and Learning Elements) for easier navigation.

To expand or collapse folders within the Catalog Tree Grid;

- Click the **arrow** symbol next to a chosen folder.

After clicking on the arrow the folder will open and expand.

- To **collapse** an already open folder, click on it's adjacent **down arrow** to close.

Details for Learning Catalog Folders

The Accord LMS Learning Catalog contains your organization's various forms of learning content.

The Learning Catalog is setup into hierarchical digital storage folders.

You have the option of implementing various types of storage folders such as **Folders, Organizational Folders**, **Learning Paths** or **Courses;** each type of which may maintain slightly varying best usages or features but all of which are fundamentally digital storage folders.
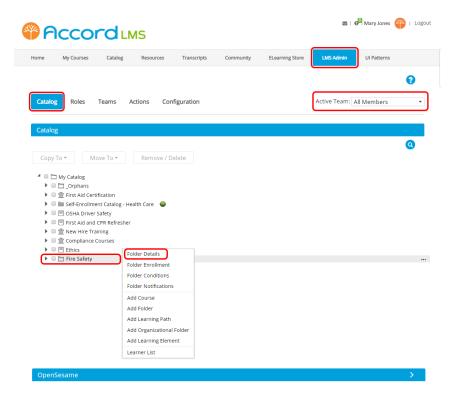
A given storage folder's properties are set up within the **Details** panel when creating new Catalog folders or updating existing Catalog folders.

These various details will include a folder's title as well as an auto-assigned **Folder ID**.

The example below illustrates accessing **Folder Details.** Use this same process for **Learning Paths**, **Organizational Folders** or **Courses**.

To access Folder Details;

- Go to the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the desired **Folder** to open it's context menu.
- Click on **Folder Details**.

The **Folder Details** panel will open.

*Information Icons; Mouse over information icons to see helpful tips.

- **General Settings;** enter or modify the folder's name. Add a description or other associated information within the description field.
- **Advanced Settings;** by clicking on and opening the Advanced Settings section, you may specify the exact **Folder Type** you desire by using the associated dropdown menu, establish an optional custom folder icon or peruse the **Local ID** and **Folder ID**. You have the option of adding administrative references within the two available reference fields. By right clicking on the link next to **Folder Access** which reads **'Open Folder'**, you can copy the specific digital link for this folder which can be sent to specific Learners or Users via email. This digital link will allow them to quickly open and access this exact folder to access it's learning content.
- **Scoring;** by clicking on and opening the Scoring section you can setup your scoring preferences for this folder.

Click **Update** to save any entries or changes.

If choosing to review only, simply click **Cancel** to exit.

Conditions Flags

If a Learning Element has a condition or limit applied to it, a **flag** icon will display to the right of its title link in the Tree Grid. This flag icon, when clicked, displays a window with information about the conditions and limitations applied to the selection.

Conditions flags include:

Orange flag: Indicates a condition is applied to the Learning Element. The condition must be satisfied before the Learning Element can be accessed.

Green flag: Indicates the condition applied to the Learning Element has been satisfied and the Learning Element may be accessed.

Tree Grid Search

The **Tree Grid Search** feature allows you to quickly locate any Learning Catalog Folders or Learning Elements which might contain a specific term or word within their specific names or titles.

To utilize the Learning Catalog Tree Grid Search feature;

- Ensure the proper **Active Team** is enacted by using it's associated dropdown menu (should there be more than one Active Team).
- Go to the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the round magnifying-glass icon to open the search field.

- Type the word you're looking for within the search field.
- Click the magnifying-glass icon to activate search.
- For this example, our chosen search word is **'fire'**.

Once the search concludes, any folders which contain other folders or Learning Elements which contain your specific search word within their titles will list.

- Click on arrows next to these folders to expand their contents.
- You also have the option of clicking on **Expand All Folders** to quickly see and peruse any folders or Learning Elements which contain your chosen search word within their titles.

The exact quantity of Learning Elements having names or titles which include your specific search word contained within any Catalog folders will display to their right.

- After clicking on **Expand All Folders**, the folders will expand as illustrated below, allowing you to quickly see and peruse folders or Learning Elements which contain your chosen search word.

Accord LMS

For more information regarding the Search function, please review the General Options article in the **LMS Admin Guide** (scroll down to **Search**).

For more information regarding the Search function, please review the General Options article in the **LMS Admin Guide** (scroll down to **Search**).

The Learning Catalog

Learning Catalog - Introduction

Purpose of the LMS Learning Catalog

The purpose of the Learning Catalog is to organize and segment various types of learning content.

This learning content may then be accessed by various Users or Learners, whether these be individual Learners or groups of Learners.

This organization and segmentation is facilitated through the usage of Learning Paths, Courses or Folders; each of which serve primarily as hierarchical digital storage folders.

Learning Elements

The concept behind **Learning Elements** is straightforward.

Any specific type of learning content is defined as a **Learning Element.**

Learning Elements are uploaded into the LMS Learning Catalog to be accessed by Learners or Users.

Learning Elements can be SCORM compliant presentations, quizzes, etc. or non-SCORM compliant files, URLs, high definition video or documents, etc.

The LMS Admin Module

The **Accord LMS Admin Module** allows you to create and organize your various types of Learning Elements within the **LMS Learning Catalog**.

- Start by creating a hierarchical structure of **Parent** and **Child** folders.
- Upload your selected Learning Elements to these folders.

Note: The Catalog Tab may or may not be present depending on the selected **Active Team**.

Ensure the proper Active Team has been selected by using it's associated dropdown menu; should there be more than one Active Team.

Learning Elements can have certain conditions applied or may have supplemental information associated.

The documentation which follows will describe how to build and maintain an effective and useful LMS Learning Catalog.

Your Accord LMS Learning Catalog may initially come supplied vacant or may contain sample Learning Elements.

Learning Catalog Folders, Courses or Paths

The Learning Catalog

The LMS Learning Catalog organizes and stores all the various forms of Learning Content within the LMS.

Learning Content is referred to as **Learning Elements**.

Navigate to the LMS Learning Catalog by;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Catalog** Tab.

The image below displays what a typical LMS Learning Catalog might look like.

Intent Behind the Various Types of Learning Catalog Folders

In it's simplest form, any Learning Catalog Folder is fundamentally a hierarchical digital storage folder, used to store other folders or various forms of Learning Content; also referred to as Learning Elements.

Rather than storing all Learning Content within a single folder, the Accord LMS allows for the logical storage and segmentation of various types of Learning Elements through the use of different hierarchical folder-types.

Choosing to utilize a particular type of Learning Catalog storage folder and taking advantage of any best-use features, facilitates the easy utilization and administration of Learning Content.

Logically setting-up the LMS Learning Catalog with the various forms of storage folders, allows for the uncomplicated management of the various types of Learners, whether these be individual Learners or a special group of Learners.

The purpose behind the various forms of Learning Catalog folder-types, which include Learning Paths, Courses, Chapters, Collections, Learning Folders or Organizational Folders, is to facilitate the logical storage, utilization and administration of the various forms of Learning Content intended to be utilized by your LMS Learners.

Learning Elements

Throughout the Accord LMS System, to include throughout any LMS help documentation, specific types of Learning Content are commonly referred to as **Learning Elements**.

Image just below shows 4 Learning Elements contained within their parent hierarchical Learning Catalog Folder, which in this particular case is titled **First Aid and CPR Refresher**. This particular folder-type is called a **Course**; a Course being one of the various types of Learning Catalog folders which may be utilized within the LMS Learning Catalog in order to store and segment selected Learning content.

Enrollment

You will assign specific Learning Catalog Folders, which contain their respective Learning Elements, to specific **Learning Roles**.

Access to specific Learning Catalog Folders and access to their associated Learning Elements is deliberately assigned, either to specific Learners or segmented groups of Learners, via specific **Learning Roles**, through a process called **Enrollment**.

Through the **Enrollment** process, Learners are assigned to specific **Learning Roles,** which then grants them access to this Role's associated Learning Elements.

To assign certain Learning Catalog Folders to certain Learning Roles;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Actions** tab.

Note; For further detailed information on the enrollment process please see our help documentation which deals more specifically with **Enrollment** at: http://help.accordlms.com/m/11168/c/51327

The 'My Catalog' Folder is Always the Top Parent Folder

Any given hierarchical folder structure within the LMS Learning Catalog will always be situated under the top **My Catalog** folder.

Once a given Learning Folder, Organizational Folder, Course or Chapter has been created within the Learning Catalog, your chosen **Learning Elements** may then be added.

Organization of Learning Content within the LMS Learning Catalog

It greatly increases the effectiveness and usefulness of the Learning Catalog by logically creating and situating the various Learning Catalog folder-types to include any associated Learning Content.

A well-structured Learning Catalog facilitates easy administration and management of various Learners and Users, helping to ensure that any ongoing learning competencies and other learning needs are efficiently and regularly satisfied, helping to avoid potential noncompliance issues.

Copying, Moving or Deleting Learning Catalog Material

Your various forms of material inside your Learning Catalog may be be readily copied, moved or removed from the LMS Learning Catalog.

Image below presents what a typical LMS Learning Catalog might look like when in the **LMS Admin** tab > **Catalog** tab.

As you can see in the image, when no items within the Catalog have been selected by having it's associated box checked, the button options oriented near the top of the page which display; **Copy To**, **Move To** or **Remove/Delete** stand grayed-out.

Catalog   Roles   Teams   Actions   Configuration

Active Team: All Members

Catalog

Copy To ▾   Move To ▾   Remove / Delete

▲ ☐ 🗀 My Catalog
   ▶ ☐ 🗀 _Orphans
   ▶ ☐ 🏛 First Aid Certification
   ▶ ☐ 🗂 Self-Enrollment Catalog - Health Care ⊖
   ▶ ☐ 🗎 OSHA Driver Safety
   ▶ ☐ 🗎 First Aid and CPR Refresher   ...
   ▶ ☐ 🏛 New Hire Training
   ▶ ☐ 🏛 Compliance Courses
   ▲ ☐ 🗎 Ethics
      ☐ 📘 Learner Experience
      ☐ 📘 Community Features 🏴
      ☐ 📘 Enrollment Overview
      ☐ ✏ Test 🏴
      ☐ 📄 Glossary of Terms 🏴
      ☐ ✏ Image Scalability Quiz

Clicking the box next to an item will highlight the buttons so that you may copy, move or delete select items as desired.

Note; Certain button options may be unavailable depending on which specific item was selected from the Catalog.

Catalog

Copy To ▾   Move To ▾   Remove / Delete

▲ ☐ 🗀 My Catalog
   ▶ ☐ 🗀 _Orphans
   ▶ ☐ 🏛 First Aid Certification
   ▶ ☐ 🗂 Self-Enrollment Catalog - Health Care ⊖
   ▶ ☐ 🗎 OSHA Driver Safety
   ▶ ☐ 🗎 First Aid and CPR Refresher
   ▶ ☐ 🏛 New Hire Training
   ▶ ☐ 🏛 Compliance Courses
   ▲ ☐ 🗎 Ethics
      ☐ 📘 Learner Experience
      ☐ 📘 Community Features 🏴
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Learning Catalog Folder Types

In the most fundamental of terms, any type of folder used to store and segment your various types of Learning Content within the LMS Learning Catalog, are types of hierarchical storage folders, whether these folders are referred to as Learning Paths, Collections, Chapters, Courses, Learning Folders or Organizational Folders.

To make the LMS Learning Catalog more useful, Accord designed certain folder-types with numbers of unique characteristics, potentially distinguishing their best-recommended usages.

As a typical-use example; individual Learning Folders may be placed under a broader Course Folder. This same Course Folder may be placed under a yet-broader Learning Path Folder.

Populating your Learning Catalog with storage folders in logical and sensible sequence will assist in keeping the Catalog organized in ways making it easy to use and easy to store your particular organization's various forms of Learning Content.

Learning Folders

📁 Folder
Allowed Child Types:
Course, Folder, Learning Path, Organizational Folder, Learning Element

Learning Folders are types of hierarchical storage folders.

Learning Folders can be created under other Learning Folders or Organizational Folders.

Learning Folders may contain sub-folders which can be either Learning Paths, Courses, Organizational Folders other Learning Folders or Learning Elements.

There are two general types of Learning Catalog Folders; Parent Folders and Child Folders.

A Parent Folder is a folder that is higher-up in the Learning Catalog hierarchy at any given level.

In order for any folder to be considered a Parent Folder, it must contain at least one Child Folder.

A Child Folder or sub-folder is a folder that is lower-down in the Learning Catalog hierarchy and always contained within a Parent Folder.

Any folder can qualify as being both a Parent Folder and Child Folder, depending on it's particular location within the folder hierarchy.

In the example image below, **Accord LMS Example Courses** is the Parent Folder. It's Child Folder is **LMS Admin Training**.

Create a Learning Folder

Create a new folder structure in the Learning Catalog by creating a new Learning Folder under the **My Catalog** Folder.

You can also create a new Learning Folder under an existing Child Folder.

- Always ensure the appropriate larger **Active Team** is selected by using it's associated dropdown menu.
- While in the **LMS Admin** tab **> Catalog** tab;
- Click on the Parent Folder you want to create the new Child Folder under.
- Select **New Folder** from it's context menu.

The New Folder panel opens.

In GENERAL SETTINGS;

- Enter a necessary name for the Folder.
- Optionally, in the Description text field, enter any accompanying information or notes.

ADVANCED SETTINGS;

If necessary, click heading to open section.

Folder Type:

Here you may use the **Folder Type** dropdown menu to select the specific type of hierarchical Learning Folder you desire this specific storage folder to be, whether a
 Chapter, **Collection**, **Course**, **Folder**, **Learning Path** or **Organizational Folder;** each specific type of which may possess some varying features or better recommended usages.

Custom Icon:

You can utilize this field to select a custom icon for this Folder, should you desire it to have a unique appearance or to allow for quick visual identification.

References:

Enter any optional reference data.

SCORING;

Here you will set any scoring parameters for this Folder.

Passing Score:

Select the desired Score to calculate Success or Failure when any assigned learning content has been duly completed by a Learner. If left blank, Success Status will not calculate.

Score Weighting:

Choose how to calculate Folder Score.

Equal – all Learning Elements and Child Folders having scores will be averaged.

Custom – all Learning Elements with score weights will be weighted. Total weight must always be 100%.

None – no score weight will be considered or calculated from this folder.

UPDATE;

Ensure to always click **Update** at bottom to save any changes.

Update   Cancel

Getting Started Quick and Easy

A simple method for getting some Learning Content to some Learners is to;

- Add a new Learning Folder to the Learning Catalog.
- Add any desired Learning Elements to this new Learning Folder.
- Set terms and conditions for the new Learning Folder, to include establishing it's associated Learning Role.
- Assign the desired Learners to the Learning Role you have chosen to associate with this new Learning Folder.

Learners can then login through their Accord LMS portal and gain access to the Learning Elements in this Learning Folder via their newly assigned Learning Role.

Organizational Folders

Organizational Folder
Allowed Child Types:
Course, Folder, Learning Path, Learning Element

From a strict functional perspective, **Organizational Folders** are folder-types identical to **Learning Folders** (as covered above).

Note; an important distinction is that Organizational Folders are set to default to be hidden from Learners, thereby prohibiting any Learner access.

Organizational Folders can only be created under **Learning Folders**.

Organizational Folders cannot contain Child or sub-Organizational Folders.

Organizational Folders may contain sub-folders which can be either Learning Paths, Courses or Learning Folders.

Learning Elements can be added directly to an Organizational Folder.

By default; a Learner will not be able to see or access an Organizational Folder unless an LMS Admin takes deliberate steps to un-hide all Organizational Folders.

Steps to un-hide all Organizational Folders are covered just below.

To Un-hide Organizational Folders

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- Once the Configuration page opens, click on **Folder Types**.

Once in **Folder Types** click on the **pencil icon** next to **Organizational Folder**.

Folder Types

When the **Folder Type Details** panel opens, un-check the small box next to **Folder is Not Visible to Learners**.

After updating and saving changes, all **Organizational Folders** within the **Accord LMS Learning Catalog** for the selected **Active Team** will be un-hidden.

Folder Type Details

UPDATE:

Ensure to always click **Update** at bottom to save any changes.

Learning Paths

Learning Path
Allowed Child Types:
Collection, Course, Learning Element

A **Learning Path** is a type of hierarchical Learning Catalog Folder which can contain sub-folder types called **Collections** or **Courses**.

Learning Paths can be created under Learning Folders or Organizational Folders.

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on **My Catalog,** to open it's context menu.
- Click on **New Learning Path**.

The New Learning Path panel opens.

In GENERAL SETTINGS;

- Enter a necessary name for the new Learning Path.
- Optionally, in the Description text field, enter any accompanying information or notes.

ADVANCED SETTINGS;

If necessary, click heading to open section.

Folder Type:

Here you may use the **Folder Type** dropdown menu to select the specific type of hierarchical Learning Folder you desire this specific folder to be, whether a **Chapter**, **Collection**, **Course**, **Folder**, **Learning Path** or **Organizational Folder**; each of which may possess slightly varying features or better recommended usages.

Custom Icon:

You may utilize this field to select a custom icon for this Folder, as to provide a more unique appearance or to better facilitate quick visual identification.

References:

Enter any optional reference data.

SCORING;

Here you will set any scoring parameters for this Folder.

Passing Score:

Select the desired Score to calculate Success or Failure when any assigned learning content has been duly completed by a Learner. If left blank, Success Status will not calculate.

Score Weighting:

Choose how to calculate Folder Score.

Equal – all Learning Elements and Child Folders having scores will be averaged.

Custom – all Learning Elements with score weights will be weighted. Total weight must always be 100%.

None – no score weight will be considered or calculated from this folder.

UPDATE;

Ensure to always click **Update** at bottom to save any changes.

Collections

A Collection is a type of hierarchical Learning Catalog Folder which can contain sub-folders; referred to as Courses.

Collections can only be created under Learning Paths.

Always ensure the appropriate larger **Active Team** is selected by using it's associated dropdown menu.

- Go to **LMS Admin** tab **> Catalog** tab.
- Click on the heading of the Learning Path you wish to create the Collection under in order to open it's context menu.
- Click on **New Collection**.

The New Collection panel opens.

In GENERAL SETTINGS;

- Enter a necessary name for the new Collection.
- Optionally, in the Description text field, enter any accompanying information or notes.

ADVANCED SETTINGS;

If necessary, click heading to open section.

Folder Type:

Here you may use the **Folder Type** dropdown menu to select the specific type of hierarchical Learning Folder you desire this specific folder to be, whether a
 Chapter, **Collection**, **Course**, **Folder**, **Learning Path** or **Organizational Folder;** each of which may possess slightly varying features or better recommended usages.

Custom Icon:

You may utilize this field to select a custom icon for this Folder, as to provide a more unique appearance or to better facilitate quick visual identification.

References:

Enter any optional reference data.

SCORING;

Here you will set any scoring parameters for this Folder.

Passing Score:

Select the desired Score to calculate Success or Failure when any assigned learning content has been duly completed by a Learner. If left blank, Success Status will not calculate.

Score Weighting:

Choose how to calculate Folder Score.

Equal – all Learning Elements and Child Folders having scores will be averaged.

Custom – all Learning Elements with score weights will be weighted. Total weight must always be 100%.

None – no score weight will be considered or calculated from this folder.

UPDATE;

Ensure to always click **Update** at bottom to save any changes.

Courses

A **Course** is a type of hierarchical Learning Catalog Folder which can contain sub-folders; referred to as **Chapters**.

Courses can also be directly populated with **Learning Elements**.

Courses can be created under **Learning Folders**, **Organizational Folders**, **Learning Paths** or **Collections**.

Always ensure the appropriate larger **Active Team** is selected by using it's associated dropdown menu.

- Go to **LMS Admin** tab **> Catalog** tab.
- **Click on the heading of the appropriate Learning Folder**, **Organizational Folder**, **Learning Path** or **Collection you wish to create the Course under and click New Course.**

The New Course panel opens.

In GENERAL SETTINGS;

- Enter a necessary name for the new Course.
- Optionally, in the Description text field, enter any accompanying information or notes.

ADVANCED SETTINGS;

If necessary, click heading to open section.

Folder Type:

Here you may use the **Folder Type** dropdown menu to select the specific type of hierarchical Learning Folder you desire this specific folder to be, whether a
 Chapter, **Collection**, **Course**, **Folder**, **Learning Path** or **Organizational Folder;** each of which may possess slightly varying features or better recommended usages.

Custom Icon:

You may utilize this field to select a custom icon for this Folder, as to provide a more unique appearance or to better facilitate quick visual identification.

References:

Enter any optional reference data.

SCORING;

Here you will set any scoring parameters for this Folder.

Passing Score:

Select the desired Score to calculate Success or Failure when any assigned learning content has been duly completed by a Learner. If left blank, Success Status will not calculate.

Score Weighting:

Choose how to calculate Folder Score.

Equal – all Learning Elements and Child Folders having scores will be averaged.

Custom – all Learning Elements with score weights will be weighted. Total weight must always be 100%.

None – no score weight will be considered or calculated from this folder.

UPDATE;

Ensure to always click **Update** at bottom to save any changes.
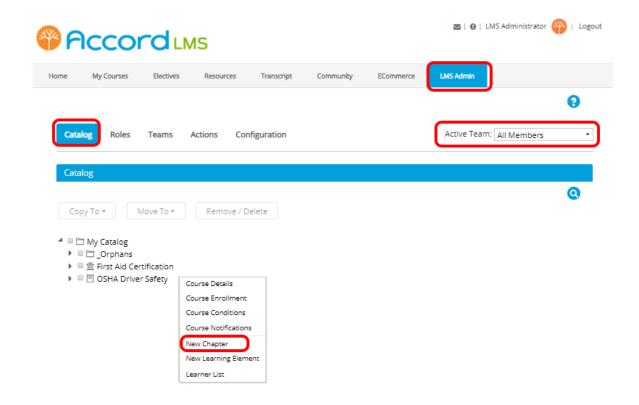

Chapters

Chapters are types of hierarchical Learning Catalog Folders which can contain Learning Elements.

Chapters can only be created under Courses.

Always ensure the appropriate larger **Active Team** is selected by using it's associated dropdown menu.

- Go to **LMS Admin** tab **> Catalog** tab.
- Click on a given Course to open it's context menu.
- Click on **New Chapter**.

The New Chapter panel opens.

In GENERAL SETTINGS;

- Enter a necessary name for the new Chapter.
- Optionally, in the Description text field, enter any accompanying information or notes.

ADVANCED SETTINGS;

If necessary, click heading to open section.

Folder Type:

Here you may use the **Folder Type** dropdown menu to select the specific type of hierarchical Learning Folder you desire this specific folder to be, whether a
Chapter, **Collection**, **Course**, **Folder**, **Learning Path** or **Organizational Folder;** each of which may possess slightly varying features or better recommended usages.

Custom Icon:

You may utilize this field to select a custom icon for this Folder, as to provide a more unique appearance or to better facilitate quick visual identification.

References:

Enter any optional reference data.

SCORING;

Here you will set any scoring parameters for this Folder.

Passing Score:

Select the desired Score to calculate Success or Failure when any assigned learning content has been duly completed by a Learner. If left blank, Success Status will not calculate.

Score Weighting:

Choose how to calculate Folder Score.

Equal – all Learning Elements and Child Folders having scores will be averaged.

Custom – all Learning Elements with score weights will be weighted. Total weight must always be 100%.

None – no score weight will be considered or calculated from this folder.

UPDATE;

Ensure to always click **Update** at bottom to save any changes.

Update Cancel

Updating Folder Details

You can modify the folder information in the **Folder Details** window.

Always ensure the appropriate larger **Active Team** is selected by using it's associated dropdown menu.

- Go to **LMS Admin** tab **> Catalog** tab.
- Click on desired folder.
- Select **Folder Details** from the Context Menu.

- The **Folder Details** window displays. Perform the required modifications.
- Click **Update** when finished.

Scoring

Scoring Process: Folder Types can have their Scoring Process set to **Roll Up** or **Pass Through**. This is done from the Folder Type Detail UI.

Passing Score: Select a Passing Score to calculate **Success Status** of Passed or Failed once the content is completed and the Score is calculated. If the Passing Score is blank, the Success Status will not be calculated.

Score Weighting: At the individual Folder level, Pass Through has no settings. All scores from child folders or LE are simply passed through to the parent folder without any processing at this level. **Roll Up** scoring has the following options:

- **Equal:** all scorable LE and child Folders with scores are weighted the same (scores will be averaged).
- **Custom:** all scorable LE can be weighted individually. The total weight must = 100%.
- **None:** no score will be stored on the Folder level

Click Update when finished to save changes.

Learner List

The Learner List is an easy method to determine which Learners or Users have been enrolled to a given Learner Folder or Learning Element.

Always ensure the appropriate larger **Active Team** is selected by using it's associated dropdown menu.

- Go to **LMS Admin** tab **> Catalog** tab.

Right Clicking on a Folder or Learning Element will bring up it's context menu. Click on **Learner List** to display enrolled Learners or Users. The Learner List will help you to determine, not only who is enrolled, but which method they were enrolled through.

The Learner List displays which shows any enrolled Learners, to include their Enrollment Type, Folder Title, Rolename and Team. You have the ability to drag a column header to the top row in order to preferably group.

Filtering a Learner List

You have the option of filtering a Learner List to find information you are seeking more easily.

As an example of filtering, we will assume we are searching for a specific username which is known to contain 'nelson'.

- Under **Username**; enter the text 'nelson'.
- Hover mouse over filter icon to open dropdown list.
- Click **Contains**

The list will refresh, showing only those usernames containing **'nelson'**.

Orphans Folders

An **Orphans** folder will automatically be created which will store any Learning Elements not presently held within any other Catalog Folder, allowing you to have continued future access to these Learning Elements. An Orphans folder will typically be automatically created when;

- You use the **Remove LE from Folder** option (on the Learning Element Context menu) and the selected Learning Element is the ONLY copy in the Catalog.
- You use the **Delete Folder** option (on the Folder's Context menu) and the folder contains a Learning Element that is the ONLY copy in the Catalog.

Delete All Orphan LE

The Orphans folder context menu allows you to delete all Learning Elements contained within this folder by a single right click.

To do this:

- Click on **_Orphans** folder.
- Select **Delete All Orphan LE** from the context menu.
- A window displays asking, **Are you sure you want to permanently delete all the Orphan LE, and all their Attempt records?**
- Click **Yes** to confirm deletion.

Folder Duration

The folder duration is calculated from the addition of all the different Learning Elements but just one session for each Learning Element. This means that if you open, close and resume a Learning Element, the duration will be added. If the Learning Element is completed and then re-started, just one of the two sessions will be counted. The options are Last, Best, or Last completed session.

Learning Elements; (learning-content)

Once you have created a basic Learning Catalog folder structure, you can start adding **Learning Elements (LE)**.

- The Accord LMS comes with built-in **Assessment Authoring** for creating quizzes and exams in addition to **Survey Authoring** tools in order to be able to create miscellaneous User surveys; such as course evaluations and feedback.
- Your catalog can be populated with traditional-type Learning Elements which are commonly based on a **Shareable Content Object Reference Model (SCORM)**. These may be presentations, quizzes and surveys created using third-party SCORM Compliant authoring tools.
- You may also use **Non-SCORM** Learning Elements. These might be desktop sharing, WebEx, a URL, site page, site module, document file, high definition video, forum, mentor chat, etc.

Essentially any digital information which can be opened or accessed through a User's ordinary web browser can be utilized as Learning Elements.

> ℹ️ A given **Learning Element** will have an associated **Element Type** (whether SCORM or not) around which metadata such as descriptions, learning objectives, etc. can be associated.
>
> **A single Learning Catalog folder may contain an unlimited amount of Learning Elements.**

Add a New Learning Element

Once you create a Learning Catalog folder, the next step is to add a Learning Element.

Once Learning Elements are added they may utilized by Users or Learners.

To add a Learning Element to a Learning Catalog folder;

- Ensure the proper **Active Team** has been selected by using it's associated dropdown menu (should there be more than one Active Team).
- Go to the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the Learning Catalog folder where you wish to add a Learning Element to open it's context menu.
- Select **Add Learning Element** from menu.

The **New Learning Element** panel will display.

Choose a **Learning Element Type** for the type of Learning Element you wish to add.

- Select **SCORM Presentation** or **SCORM Quiz** if you want to add SCORM content to your Learning Catalog.
- Select the **Assessment** or **Survey** option if you choose to use **Accord LMS integrated authoring tools.**
- Other options include **Instructor Led Training (ILT)**, **Certificate** (PDF), **Microsoft Asset, Google Asset** and other **Non-SCORM** type content.

New Learning Element

Select a Learning Element Type

SCORM Presentation
Upload SCORM compliant presentations or demonstrations.

SCORM Quiz
Upload SCORM compliant assessments or surveys.

Assessment
Create quizzes or exams with an integrated question builder.

Survey
Create surveys or questionnaires with an integrated question builder.

Instructor Led Training
Track Classroom or Webinar based Instructor Led Training.

Certificate
Upload or Select PDF based Certificates of Completion.

Rich Text
Add Rich Text web content including images and embedded videos.

Microsoft Asset
Upload or Select Microsoft Word, Excel or PowerPoint.

Google Asset
Link to Google Doc, Sheet, Slides or Form.

File
Upload or Select images, videos, zip files and other file based assets.

Assignment Upload
Upload assignments, certificates, documents, images or other digital assets.

Link
Link to any web based asset such as Wikipedia or Khan Academy.

Module
Present access to onsite modules.

Cancel

Once you select a Learning Element type from the list above, a **New Learning Element** panel will display.

Enter information and settings to format and display the Learning Element as desired.

- **Name:** Type a necessary name for the Learning Element in provided field. This name will list in the Learning Catalog.
- **Learning Element Format:** The format determines how your Learning Element is presented and processed. You may use the dropdown menu to use other available formats.
- New formats may be added in the Learning Element Format section under **LMS Admin > Configuration**.
- **Custom Window Dimensions:** Checking this box will allow you to input any value (up to 5000) to use as Width and Height dimensions for the Learning Element Launch Window.
- **Enable Proctoring:** Check box to allow this Learning Element to be proctored via third party online proctoring.
- **Description:** Type Learning Element lesson details or objectives into the Rich Text Editor. To embellish any text, use the available formatting tools from the toolbar. Mouse over buttons to see tool tips.
- **SCO:** Browse and select a SCORM compliant Content Object in a zip deployment package.
- **Version History:** Initially, version history will be blank. Version history will update each time you update any Learning Element details.
- Once you've selected the desired Learning Element properties you may scroll to the bottom of the panel and click **Update**. This will add this Learning Element to the Catalog where it may be utilized immediately.

If opting to enter any **Advanced Settings**, **Remote SCO** settings or **Education Activities**, please scroll for further information on these features.

Advanced Settings

- Click on **Advanced Settings** to open panel.

Whenever creating a new Learning Element or editing an existing one, you may utilize **Advanced Settings**. This allows for further options concerning the setup and use of your Learning Element.

- **Learning Element (LE) Type:** You can use the dropdown menu to change the Learning Element Type. Please have in mind that changing the LE Type will result in the loss of the Learning Element Detail Settings but it will not affect any Enrollments, Attempt Records or Education Activities that may already exist for this Learning Element.
- **Utilization Tracking:** Using the adjacent dropdown menu, select between tracking **Provided by SCO**, **None** or **None - Resource**.
- **Element Storage:** Shows the location where your SCORM Element is stored.
- **Passing Score Manifest Value:** This comes preset at 100% and allows passing scores to be rated against a 100% value.
- **Passing Score Reported Value:** Enter a numeric value to be considered the passing score for this Learning Element.
- **Location to Complete**: This option captures slide position and is used together with the SCO reported Location value to calculate the [LOCATION%] token. This can be used with SCO allowed to resume.
- **Directory Name:** This shows the name of the folder where the SCORM files are stored in the server file system.

- **Expected Duration:** Type in an estimated viewing time for this Learning Element.
- **LEID** (Learning Element ID); This is a unique identification string (made up of alpha and numeric characters) assigned to this Learning Element once added to Catalog. The LEID is used to identify the Learning Element.
- **Local ID:** This is the value of a local Learning Element auto increment field and a unique value within the portal. The Local ID is assigned whenever a Learning Element is created.
- **Reference:** This is an optional reference field for administrative use. In most instances this field may be left blank.
- **Status:** An **Active** Learning Elements is available for Learner utilization. **Inactive** status hides this Learning Element from Learners.
- **Views:** This displays the number of times this Learning Element has been viewed.
- **Publish Date:** Enter a publish date into this field or select a date by clicking on the adjacent calendar. This Learning Element becomes available to Learners on this date.
- **Tags (separated by commas):** Type in words or phrases to help identify this Learning Element during searches. Separate each word or entire phrase by a comma.
- **Utilized in Folders:** Shows a list of folders where this learning element is being used.

Remote SCO

The **Remote SCO** panel is where various SCO learning content can be setup to be used by Learners utilizing a remote LMS.

For comprehensive instructions on setting up and using any Remote SCO, please see the accompanying help documentation at; http://help.accordlms.com/m/11168/l/1186592-remote-sco-learning-content

Education Activities

This section will allow you to setup various conditions for any Learners utilizing the Learning Element; conditions such as **Complete** or **Pass** in order to fulfill any learning requirements.

You may also choose to assign **Education Units** (or points) and/or assign points for **Workplace Conduct**.

Such information will reflect in Learner Attempt records.

To access Education Activities;

- Click on **Education Activities** to open panel.
- **Award Requirements:** Using the associated dropdown menu, specify the necessary requirements to award Education Activities. Available options are **Complete**, **Pass**, **Complete or Pass** or **Complete and Pass**.
- **Education Units:** Enter a numeric value for the amount of **Education Units** to be awarded to Learners. Standard Education Units are available in reports.
- **Workplace Conduct:** You have the option of entering a numeric value in this field.
- Click **Update** to save changes.

Learner List

The Learner List is an easy method to determine which Learners or Users have been enrolled to a given Learning Element.

- Clicking on a Learning Element to open it's context menu.
- Click on **Learner List** to display enrolled Learners or Users.

The Learner List will help you to determine, not only who is enrolled but through which method they were enrolled.

The Learner List will display which shows any enrolled Learners, to include Enrollment Type, Folder Title, Rolename and Team.

You have the ability to drag a column header to the top row to preferably group.

Filtering a Learner List

You have the option of filtering a Learner List to find certain information easier.

As an example of filtering, we will search for the specific username of **'nelson'**.

- Under **Username**; enter **'nelson'**.
- Hover mouse over filter icon to open dropdown list.
- Click **'Contains'**.

Learner List

The list will refresh, showing only usernames containing **'nelson'**.

Learner List

Learning Element Types

Learning Element Types are the **core** of each Learning Element. These will include; **SCORM Presentation, SCORM Quiz, Assessment, Survey, Instructor Led Training, PDF Certificate, Rich Text, Microsoft and Google Assets, URL/Page/File** or **Module**. Once selected, options will display which are appropriate for that specific Learning Element Type.

SCORM objects are the most traditional Learning Elements (LE). They are built using SCORM Compliant authoring tools such as Captivate, Articulate or ViewletBuilder.

SCORM objects provide standardized status reporting back to the LMS which include **Complete**, **Incomplete**, **Pass**, **Fail** and **Score.** You may opt for discrete reporting for quiz question interactions.

Non-SCORM compliant resources or elements are things such as WebEx, forums, wikis, social networking, classroom training, certificates of completion, etc., Most anything that can be linked to or referenced on the web can be used as a Non-Scorm Learning Element.

Accord LMS provides **utilization tracking options** for tracking Learner interactions with Non-SCORM elements to include; **Incomplete on Open**, **Complete on Open**, **Complete on Close**, and **Complete on Duration** (discussed later in this section).

SCORM Presentation
Upload SCORM compliant presentations or demonstrations.

SCORM Quiz
Upload SCORM compliant assessments or surveys.

Assessment
Create quizzes or exams with an integrated question builder.

Survey
Create surveys or questionnaires with an integrated question builder.

Instructor Led Training
Track Classroom or Webinar based Instructor Led Training.

Certificate
Upload or Select PDF based Certificates of Completion.

Rich Text
Add Rich Text web content including images and embedded videos.

Microsoft Asset
Upload or Select Microsoft Word, Excel or PowerPoint.

Google Asset
Link to Google Doc, Sheet, Slides or Form.

File
Upload or Select images, videos, zip files and other file based assets.

Assignment Upload
Upload assignments, certificates, documents, images or other digital assets.

Link
Link to any web based asset such as Wikipedia or Khan Academy.

Youtube
Youtube video.

SCORM Presentation

 SCORM Presentation

SCORM is the most popular type of Learning element. They can be PowerPoint presentations, videos or interactive presentations. You may choose to add a built-in quiz for these types of Learning Elements. The hosting LMS will provide the status, score and other details from SCORM Learning Elements. SCORM Learning Elements can also be shared with other SCORM compliant LMS.

SCORM Quiz

 SCORM Quiz

SCORM elements may be quizzes which report the response and score for each question. They will also provide final scores and passing status.

SCORM Assessment or Surveys

 Assessment   Survey

The **Integrated Question Builder** will help you create quizzes and questionnaires without needing to rely on any external tools.

Each Assessment or Survey allows you to add question groups to a quiz and answers for each question. There are different types of questions available for you choose from; **Multiple Choice** with either multiple or single answers, **Yes/No, True/False** and **Text** answers. When building a survey you may also add a Rating (Likert Scale).

 For more information you can refer to; Assessment and Survey Authoring Tools

Instructor Led Training

Your Accord LMS supports **Instructor Led Training (ILT**) which can integrate, track and report on a classroom with online and virtual training. **ILT** can have single or multiple **Sessions**. Each Session has a Learner Roster with online editing for quick Learner status updates.

> ℹ️ Please see the **Instructor Led Training - ILT Learning Elements** section for a full description.

Certificate (Certificate PDF)

The Certificate (PDF Template) is a non-SCORM resource that can be added to course folders. This allows you to create high-quality, high-resolution PDF documents for announcements, courseware and certificates. You can place **named fields** in the PDF Template and the Accord LMS will dynamically replace these named fields with DNN and LMS token values. The template can be created from any PDF authoring tool which will provide a high-quality output with complete control over resolution, orientation, page size, etc.

Select a **File Location** from the list. For the default template, select the **docs** folder location. Wait for the page to refresh.

- Select an existing PDF template that has already been uploaded to your LMS.
- You may also click on the **Upload a File** button and browse to locate and upload a new PDF template from your local hard drive.

Certificate: * ⓘ

Drag and Drop a File or Select an Option

Scroll down to **Advanced Settings** and open this panel by clicking on it.

Advanced Settings   ⌄

Select a **Reference LE** from the list. Its values will be used for all reference tokens. This selection is optional. This will allow you to pull in values such as LE Name, Score, Completion, etc. from any other LE in your system.

Note; LE are Learning Elements; otherwise your Learning Content.

Available Tokens: Click the **View** link next to this label to view the available tokens that will be dynamically replaced when the user opens the template. Nearly 100 different tokens are supported such as [Learner:FullName], [LE:FolderName] and [DateTime:Now]. You have the option of pulling in token values from other **Referenced** Learning Elements, such as a score from a prerequisite quiz.

A full list of PDF Tokens and descriptions can be found in the **Certificate of Completion** section.

Common Settings (for Non-SCORM Learning Elements): See below for more information.

Rich Text

Rich Text

This non-SCORM resource allows you to quickly and easily insert any Text or HTML into a Rich Text Editor which is placed as a Learning Element into your Catalog and opened in a popup window just like any other Learning Element. The rich text editor supports text, links, images, Flash, embedded YouTube videos, PayPal buttons, etc.

Scroll down to **Advanced Settings** and open the section if necessary by clicking on it.

Available Tokens: Click the **View** link next to this option to view available tokens that can be used as a replacement of dynamic content in your resource. Although tokens are typically optional, they will be used when creating Certificates of Completion

AVAILABLE TOKENS

Token	Description
[Learner:FullName]	The learner (user that is asosiated with the attempt) first name and last name
[User:DisplayName]	User's Display Name
[User:Email]	User's Email Address
[User:FirstName]	User's First Name
[User:FullName]	[deprecated]
[User:LastName]	User's Last Name
[User:Username]	User's Login User Name
[Profile:Property]	Use any Profile Property, even custom.
[Membership:Approved]	Is User Approved?
[Membership:IsOnline]	Is User Currently Online?

Print This Page: Check this box to include a **Print This Page** link to the resource so a Learner will have the option of printing it (Text/HTML only).

Print This Page: ⓘ ☐

Common Settings (for Non-SCORM Learning Elements): See below for more information.

Microsoft Asset

This Learning Element Type allows you to create Learning Elements by uploading Microsoft Office files like Microsoft Word, Microsoft Excel or Microsoft PowerPoint which will be displayed using Microsoft's Viewer if the file size is less than 10mb otherwise the file will be downloaded by the browser.

- Use the control below to Browse for an existing file or to upload a new file.

Microsoft Asset: ***** ⓘ

Drag and Drop a File or Select an Option

Google Asset

By using this Learning Element Type you can create a Learning Element which links to an online Google resource and will display using the Built in Viewer for Google Docs, Sheets and Slides.

- Use the box provided to input the link to the specific document (Google Asset).

Asset Location: ***** ⓘ   https://

File

Use this Type if you want to upload or Select images, zip files and other file based assets. The files or web resources will display in a popup window or download dialog box (depending on file type).

- Use the control below to **browse** for an existing file or **upload** a new one.

File: * ⓘ

Drag and Drop a File or Select an Option

Assignment Upload

⬆ **Assignment Upload**

This Learning Element type will allow Learners to upload assignments, certificates, documents, images or other digital assets and functions in a manner similar to a dropbox.

Learner Assignment Upload

Assignment: * ⓘ ◉ Upload ◯ Link

⬆ ✕
Drag and Drop a File or Select an Option

Comments: ⓘ

[Upload] [Cancel]

In order to verify the digital asset uploaded from a particular Learner;

- Go to the **LMS Admin** tab.
- Click on the **Reports** tab.
- Select the report type **Learner Activity/Transcript with LE Detail.**

- Under **Display Columns**, ensure the check box next to **Assignment** under **Learning Elements** has been checked to ensure it displays within the report.
- If choosing to allow LMS Admin to grade such uploaded assignments, also check box for **Assignment Grading**.

After selecting any Learning Catalog folders, Teams, Roles or specific Learners you wish to be included in the report, click on **Generate Report**.

Once the report has generated, scroll down to the Learners within the report you wish to verify the **Assignment Upload** for and click on the highlighted link under the **Assignment** column. This will display the digital asset uploaded from the respective Learner.*

*Note; the particular method in which this selected link will display may depend upon your individual system settings.

> **Grading a Learner Assignment Upload**
>
> For help documentation which explains how to quickly peruse and grade an assignment uploaded by a Learner please go to; <u>Grading a Learner Uploaded Assignment</u>

Link

With this Learning Element Type you can add a link to any web based asset such as Wikipedia or Khan Academy.

This resource is divided into two further options which include:

URL: This is an external web resource. For example, this might be a link to a page with more information about a seminar being held at a convention center, or to a page for defining a term at Wikipedia.org.

- Select the radio button next to **URL**. Wait for the page to refresh.
- Type in the full path of the URL in the field provided (if using a **new** URL).

Link Type: *   ⦿ URL (A Link To An External Resource)
                ○ Page (A Page On Your Site)

Location: (Enter The Address Of The Link)   http://

Page: This is any site page within your local portal showing pertinent resources or class information. Includes site skin and menu navigation.
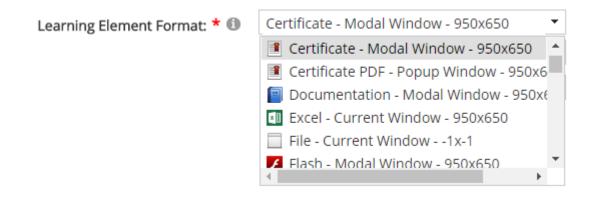
- Select the radio button next to **Page**. Wait for the page to refresh.
- Select a Web page from your site from the list.

Link Type: *   ○ URL (A Link To An External Resource)
                ⦿ Page (A Page On Your Site)

Select A Web Page From Your Site: Home ▼

Common Settings (for Non-SCORM Learning Elements)

Once you've completed the unique option settings based on the element source of your non-SCORM; **Instructor Led Training**, **Certificate, Rich Text, Microsoft Asset, Google Asset, File, Link** or **Module** Learning Element, the next step is to complete the remaining common settings.

Learning Element Format: This determines how the resource window is launched. You can change the Learning Element Format of any Learning Element by selecting one from the list that is appropriate for opening your non-SCORM element source (see Learning Element Formats under the **Configuration** chapter for more information).

Scroll down to **Advanced Settings** and open this panel by clicking on it.

Utilization Tracking: Determines if and how Learner utilization of Non-SCORM compliant content will be tracked in the LMS. **Non-Scorm Learning Element** tracking can be accomplished using the same options used for **SCORM** reporting, for both LMS Admin and Learner. Not all the options below will apply to every Learning Element Type. Among the available options you may find:

- **"In Progress" on Open:** Records the status as **In Progress** if the launch window is opened. Use this option for Instructor Led Training where an LMS Admin will create a final attempt record when the class is completed.
- **"Complete" on Open:** Records the status as **Complete** if the launch window is opened.
- **"Complete" on Close:** Records the status as **Complete** if the launch window is opened and then closed.
- **"Complete" on Expected Duration:** Records the status as **Complete** when the launch window is closed after the Estimated Duration (mandatory).
- **None:** Indicates status will not be tracked.
- **None - Resource:** Status will be **Resource** and will not be tracked. It will be displayed under Resources tab in Learner Module, if active.
- **Include "Pass" upon "Complete"** check box to further incorporate the extra condition of passing upon completion.

Accumulate Duration: This option is only available when the "Complete" on Duration option is selected. Accumulates all the durations until the LE is completed. Once completed, the LE will show the accumulated time. If there are follow-up attempts, they will not be shown if not completed. However, each incomplete time will be accumulated behind the scenes until the LE is finally completed. The new accumulated time will then be shown as the most recent/best attempt.

Expected Duration: Type in a number for the **estimated** viewing time (in minutes) for the resource. If "Complete" on Duration option is selected, the Expected Duration field is mandatory.

Version History: Initially, the version history will be blank. A unique update record will be kept each time the element source is updated for version tracking.

Learner List

The Learner List is an easy method to determine which Learners or Users have been enrolled to a given Learning Element.

Right Clicking on a Learning Element will bring up it's context menu. Click on **Learner List** to display enrolled Learners or Users. The Learner List will help you to determine, not only who is enrolled, but which method they were enrolled through.

The Learner List displays which shows the enrolled Learners, to include Enrollment Type, Folder Title, Rolename and Team. You have the ability to drag a column header to the top row in order to preferably group.

Learner List

Learners

Drag a column header and drop it here to group by that column

Username	Enrollment Type	Folder Title	Rolename	Team
4329	Role Folder Enrollment	LMS Admin Training	LMS Admin Training	All Members
aahmednafea	Role Folder Enrollment	LMS Admin Training	LMS Admin Training	All Members
abckelly	Role Folder Enrollment	LMS Admin Training	LMS Admin Training	All Members
aimfeld	Role Folder Enrollment	LMS Admin Training	LMS Admin Training	All Members
alasmi	Role Folder Enrollment	LMS Admin Training	LMS Admin Training	All Members
christian	Role Folder Enrollment	LMS Admin Training	LMS Admin Training	All Members

|◀ ◀ **1** 2 3 4 5 6 ▶ ▶| 20 ▾

Return

Learning Element Management

Preview Learning Elements

It is easy to preview any Learning Element in the Catalog.

To Preview a Learning Element;

- Ensure the proper **Active Team** has been selected (should there be more than one Active Team).
- Navigate to the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Expand the Catalog as needed until you see the desired Learning Element.
- Click on the Learning Element to open it's context menu and select **Launch LE**.

The Learning Element will open and launch. When finished, close it as you would any other window application.

⚠ **The utilization of Learning Elements launched from the LMS Administration Module is not tracked or captured to the database.**

Edit Learning Element Details

Updating a given Learning Element consists of modifying any of its properties or conditions.

These properties or conditions are edited within the **LE Details** panel.

To update an existing Learning Element;

- Ensure the proper **Active Team** has been selected (should there be more than one Active Team).
- Navigate to the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the desired Learning Element to open it's context menu.
- Select **LE Details** from the menu.

- The **LE Details** window displays. Modify any information as needed.

- Click **Update** to save and apply any changes.
- For more Information on **Advanced Settings** for Learning Elements, please refer to the **Learning Elements** chapter.

Move Learning Elements

Moving Learning Elements within the Catalog is as simple as selecting it and then dragging and dropping it into a new folder or a different location within the same folder.

> ℹ️ When a Learning Element is moved from it's original **parent** folder, it **disowns** the properties (including enrollment) of the old **parent** folder and acquires any assigned properties of it's new **parent** folder.
>
> Any particular properties unique to the Learning Element are maintained.

To move a Learning Element:

- Select the checkbox next to the chosen Learning Element.

- Click the **Move To** button.
- Select a destination folder from the menu.

A dialog box will ask you to confirm.

- Click **Yes**.
- The screen will refresh and the Learning Element will be moved to its new location.

To move multiple Learning Elements:

- The procedure is the same as when moving single Learning Elements. Ensure to select the checkboxes that correspond to the Learning Elements you want to move.

Copy Learning Elements

If you have Learning Elements available and want to copy them to another folder within the Catalog, follow the steps described below.

- **Check** the boxes next to the chosen Learning Elements.
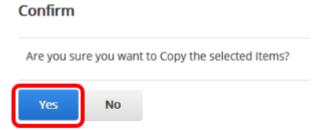
- Click the **Copy To** Button.
- Select a destination folder from the menu.

A dialog box will ask you to confirm.

- Click **Yes**.

The screen will refresh and the Learning Elements will be copied to their new location.

LE Conditions & Limits

Conditions are requirements that must be met for the Learner to launch a Learning Element. Conditions are optional.

To create or edit Conditions for an individual Learning Element;

- **Click** on the chosen Learning Element.
- Select **LE Conditions & Limits** from its context menu.

The **LE Conditions** window opens:

Prerequisites: Use this condition to make it mandatory that certain Learning Elements are completed prior to having access to another Learning Element. Any prerequisite Learning Element must already be present in the Catalog.

- Click the **Add New Prerequisite** button.

LE Conditions

Catalog Overview Prerequisites

This Learning Element has no Prerequisites

Add New Prerequisite

- An **Add New Prerequisite** window displays. If the Learning Element is not in view, scroll down the page until you see it.
- Use the **Search** field to search for the desired Learning Element if needed.
- **Check** the **box** next to the desired Learning Element to select it as a prerequisite.

ADD NEW PREREQUISITE

Learning Elements

- My Catalog
  - hidden
  - Accord LMS Example Courses
  - Rick's Test Folder
  - My Parent Folder

- The selected Learning Element will automatically be added to the prerequisite list back in the **Learning Element Details** window.
- Select the radio button next to the **Status** the Learner must achieve in order to **satisfy** the prerequisite: **Completed** or **Passed**.

Repeat the above steps to add all the Prerequisites needed.
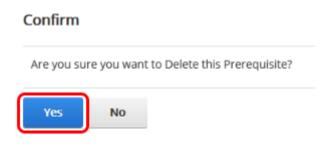
- To remove a Learning Element from the list, click on the red **X** next to the Learning Element you wish to remove.

A confirmation dialog saying: 'Are you sure you want to Delete this Prerequisite?' will display.

- Click **Yes**.

The selected prerequisite will be removed from the list.

Attempt Limit: Use this condition to set the number of attempts allowed for accessing the Learning Element.

- Type the number of attempts allowed in the field provided.
- Select **All** for all attempts to access the Learning Element.
- Select **Completed Only** for the completed attempts only.
- Select **Passed Only** for passed attempts only.
- **Reset Options** will automatically reset the Attempt Limit given the selected condition after the specified delay time.

- Click **Update** to save your changes.

Completion Events

- **Click** on the desired Learning Element.
- Select **LE Completion Events** from its context menu.

- The **LE Completion Events** window opens.

Completion Requirements: Requirements for all Completion Events to execute. Select from **Completed**, **Passed**, **Completed and Passed** or **Completed or Passed**.

The following options allow you to assign selected Learning Roles to a Learner after they complete or pass a given Learning Element.

- Select a **Role Group** from the list. This will determine the Learning Roles available to be added or deleted.
- Select a Learning Role from the **Role** dropdown menu.

- Once your selections are made, Click **Add New Role**. This will add it as a Role eligible for award in the list.

After the Role is added you can select how the Role Award will be treated, by selecting any of the options in the drop-down. These options include:

- **Create:** Role is created only if new.
- **Create or Update:** (default) Creates if the Role is new or updates are made to the existing start/due dates.
- **Create or Add:** Creates the Role if it is new. If existing then adds the duration to the Role.
- **Expire:** Once awarded, the Role will be automatically expired.

- **Delete:** Removes the Role from the user(s).

Repeat the above steps to add as many Role Awards as needed.

- To remove a Role from the list, Click on the red **X** next to it.

A the confirmation message saying: 'Are you sure you want to Delete this Role Award?'.

- Click **Yes**.

- **Http Requests:** Click **Add New Request** button.

Complete the **Http Request Details**.

- Click **Update** to save your changes.

The newly created Request will be listed.

- Click **Update** to save any changes.

Status Notifications

Learning Element Status Notifications can be sent to LMS Administrators and to Learners. They can be sent for **All LE** or **Specific LE**. The type of Notifications sent to Learners is configured at **LMS Admin > Configuration > Notifications > Learner Notifications**. Each LMS Admin must configure their own notifications under **Teams > Click/Tap Admin Type > LMS Admin Notifications**. If general LE options are selected, then notifications will be sent for **All** Learning Elements. If only **Specific LE** Notifications are selected, then notifications will only be sent if individual LE has its **Status Notification** options set. Once any of the status conditions are met, the Notifications will be sent.

> ⊗ In order for Notifications to be sent by the LMS, the General Notifications Switch must be active. This is done by navigating to **LMS Admin > Configuration > Notifications > General Settings** and activating the **Enable LMS Email** checkbox.

To create or edit Status Notifications for an individual Learning Element:

- **Click** on the desired Learning Element.
- Select **LE Notifications** from its context menu.

- The **LE Notifications** dialog box opens:

- **Utilize Global Settings:** Checked by default. When checked it will utilize the Global Learner and LMS Admin Notification settings. Un-check this option to access individual Learning Element notification options.

- **Notify:** Enable if Learners, LMS Admin or Both will get the Notifications.

- **Session Registration:** Sends a notification when a Learner is registered to a Session, either by self or by LMS Admin.
- **LE Attempts:** Sends Notifications for different types of LE Attempts (All, Complete, Pass).
- **Conditions Satisfied:** Sends Notifications if all Conditions become satisfied for this LE.
- **Learner Comments:** Sends a Notification if a Learner leaves Comments. Presently this is only supported for comments submitted within SCO.

- Click **Update** to save any changes.

ℹ Each LMS Admin must have **My Team > Admin Type context menu > LMS Admin Notifications** configured in order to receive Status Notifications.

Learner List

The Learner List is an easy method to determine which Learners or Users have been enrolled to a given Learning Element.

Right Clicking on a Learning Element will bring up it's context menu. Click on **Learner List** to display enrolled Learners or Users. The Learner List will help you to determine, not only who is enrolled, but which method they were enrolled through.

The Learner List displays which shows the enrolled Learners, to include Enrollment Type, Folder Title, Rolename and Team. You have the ability to drag a column header to the top row in order to preferably group.

Remove Learning Elements

> ⓘ Before removing any Learning Elements, it is recommended that you export and save a report containing all Learner Attempt Records associated with the Learning Element. For further information see the [Reports Module](#) chapter in this guide.
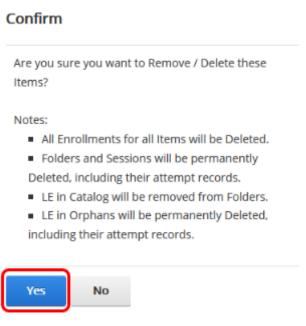
To remove Learning Elements using the Remove/Delete option:

- Check the boxes next to the Learning Elements you want to remove.
- **Click** the **Remove / Delete** button.

A confirmation dialog box will show:

- Click **Yes** to continue the process.

Confirm

Are you sure you want to Remove / Delete these Items?

Notes:
- All Enrollments for all Items will be Deleted.
- Folders and Sessions will be permanently Deleted, including their attempt records.
- LE in Catalog will be removed from Folders.
- LE in Orphans will be permanently Deleted, including their attempt records.

[Yes]   [No]

The page will refresh and the Learning Element will be removed.

ℹ If you use the **Remove** option to remove a Learning Element from the Catalog **and** the LE is the only one of its kind available in the Catalog, it will automatically be placed in the **_Orphans** folder for future access. The Orphans Folder is not visible/accessible to Learners. **Note** that certain Learning Elements will not function properly while in the Orphans folder and must be placed back into a Learning Element Folder to be used again.

To **Permanently** remove a Learning Element:

- Click on the Learning Element you wish to delete and select **LE Details**.
- Scroll to the bottom of the Dialog Box and click **Delete**.

At the confirmation dialog box:

- Click **Yes**
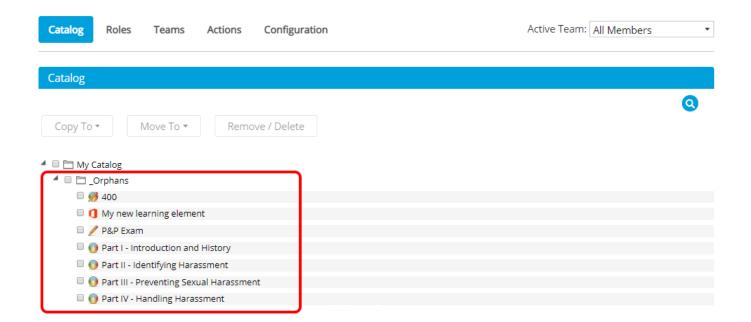
Orphan Learning Elements

When you delete a folder or Learning Element from the Catalog or use the **Remove From Folder** option to remove any LE from any Catalog course folder, any of these Learning Elements which happen to be **unique** to the Catalog, meaning that this particular Learning Element is not held within any other Catalog folder, the LMS recognizes this fact and will conveniently store this LE by placing it into an automatically created **Orphans** folder.

This allows for the LE to be easily located and reused in the future.

Should there not be an **Orphans** folder, presently there are no Orphan Learning Elements.

To Delete Learning Elements from Orphans Folder

- Check to ensure the proper **Active Team** is selected by using it's associated dropdown menu; should there be more than one Active Team.

- Click on **LMS Admin** tab.
- Click on the **Catalog** tab.
- Locate the **Orphans** folder directly under the **My Catalog** folder and click on it's arrow to expand the contents. **Note;** should there be no Orphans folder, this means there are presently no Orphan Learning Elements.
- Check boxes of any specific Learning Elements you wish to delete from folder.
- Click **Remove / Delete**. Once deleted, this action cannot be reversed.

To Delete All Learning Elements from the Orphans Folder

- Click on the **Orphans** Folder and select **Delete All Orphan LE**. Once deleted, this action cannot be undone.
- **Important Note;** Ensure the proper **Active Team** is selected by using it's associated dropdown menu before using this feature; should there be more than one Active Team.

Catalog   Roles   Teams   Actions   Configuration

Active Team: All Members ▼

Catalog

Copy To ▼   Move To ▼   Remove / Delete

▲ ☐ 🗀 My Catalog
  ▲ ☐ 🗀 _Orphans
        Delete All Orphan LE
    ☐ 🔶 400
    ☐ 📙 My new learning element
    ☐ ✏️ P&P Exam
    ☐ 🌐 Part I - Introduction and History
    ☐ 🌐 Part II - Identifying Harassment
    ☐ 🌐 Part III - Preventing Sexual Harassment

Certificate of Completion
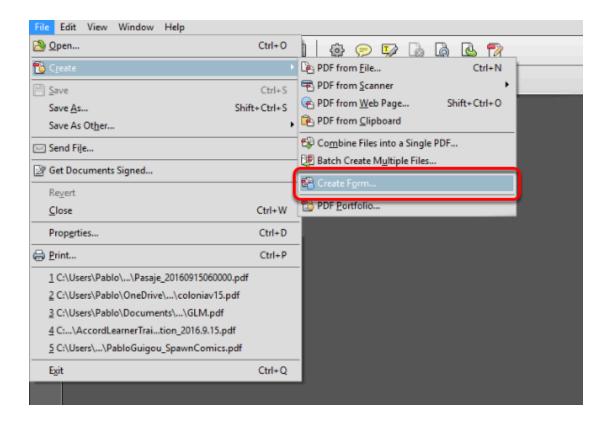
Create a Certificate of Completion

For the purpose of creating a PDF Certificate, a **PDF Authoring Tool** which supports dynamic form fields is required. Examples; Cute PDF Pro, Nitro Pro, Adobe Acrobat Pro.

This tutorial assumes that you already have a background image or document to be used as a desired Certificate of Completion for your LMS.
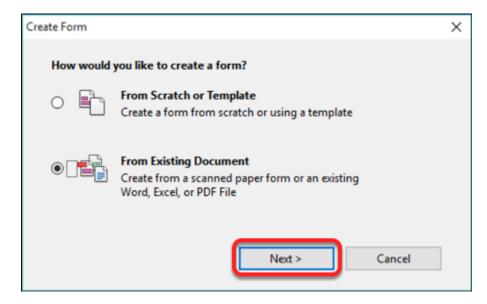
Create a new form file using the **Create Form** option.

- **File** menu > **Create** > **Create Form.**

In the next window,
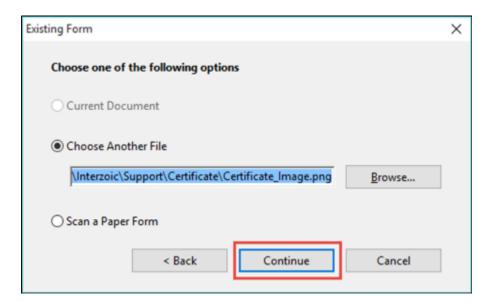
- Select the **From Existing Document** option;
- Click **Next.**

In the next screen use the **Browse** button to locate the image or document file you intend to use as the background for your main certificate.

- Click **Continue**

The document will be generated showing the background.

Now you can place form fields in the PDF Template and the Accord LMS will dynamically replace those fields with DNN and LMS token values.*

*Note;Tokens are placeholders or variables used when creating certificates or email templates to personalize them. e.g. Dear [User:FirstName] will insert the recipients first name when it is sent.

To find available tokens, go into **LE Details** and then **Advanced Settings**. There you will see a **View** link to see available tokens.

To place the form fields:

In the **Forms** bar click the **Add New Field** button.

- Select **Text Field**.

- Place the new **Text Field** anywhere on the document.

- Double click on the new text field to edit its properties.

Replace the current name in the **Name** field with the Accord LMS Token you would like to use.

- **Close** the dialog box.

Repeat these steps to add as many fields as you require.

Cleaning the Certificate of Completion
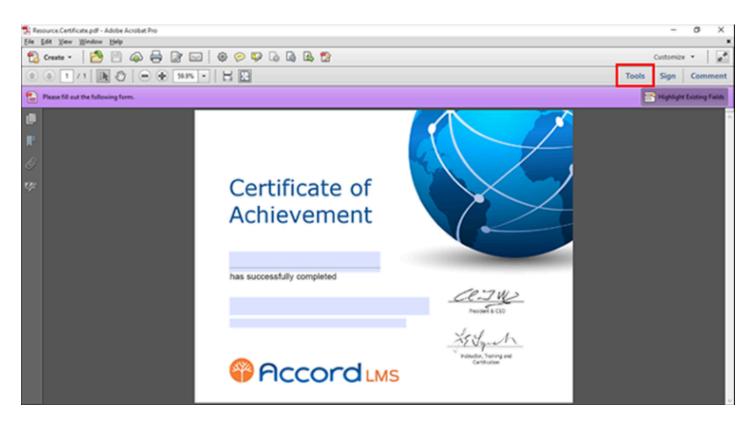
Certain PDF publishing tools or plug-ins can result in damaged PDF files when using them as Certificates in the Accord LMS. This is usually due to certain metadata contained somewhere within the file.
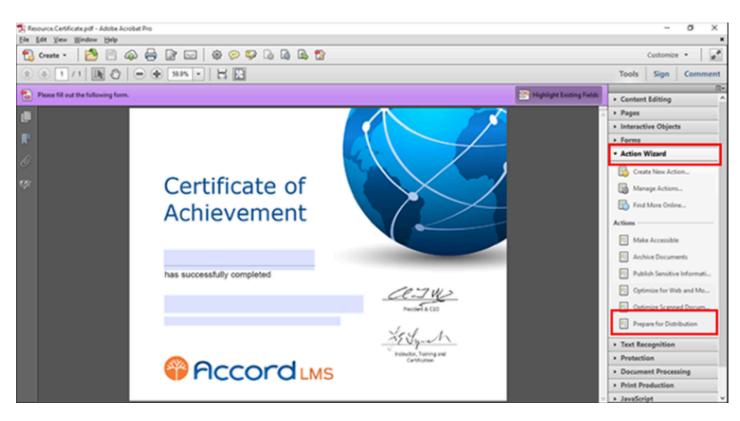
Open the **PDF Certificate** using the PDF editor of your choice. Please note that Adobe Acrobat Pro was used for this tutorial so images and procedures may vary from your actual software.
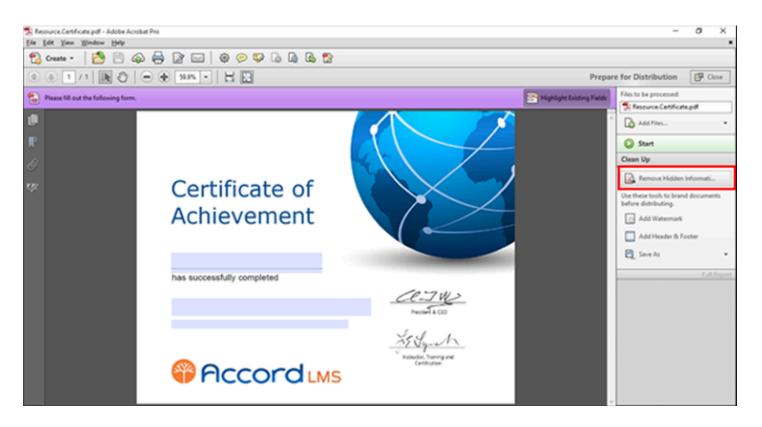
- Open the **Tools** menu.

- In the **Action Wizard** menu, click on **Prepare for Distribution** option.

- Click on **Remove Hidden Information**.

- A dialog box opens, make sure that you unselect **Form Fields** and click **OK**.

- This will remove all unnecessary data included in the PDF.
- Save the document and then continue uploading it into the LMS.

Upload the Certificate to Accord LMS

Once the certificate is made, you will need to create a new Learning Element within the Learning Catalog in order to digitally store and access your certificate.

- Ensure the proper **Active Team** has been selected by using the associated dropdown menu; should there be more than one Active Team.
- Navigate to the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the folder where you want to store your Certificate to open it's context menu.
- From the context menu, select **Add Learning Element**.

- In the **New Learning Element** window, select **Certificate**.

- In the **New Learning Element** window, fill in the details such as **Name** and **Description**.

- Click on **Upload a File**.

- Locate and select the PDF file created in the previous steps.
- The file will be uploaded to the LMS.

In order for the Certificate to know which data to display, we need to instruct it to monitor a chosen Learning Element. We call this a Reference Learning Element (LE) and this is typically already loaded into your system as a Quiz or Presentation.

- **Advanced Settings:** Click to open the section if necessary.

- From the **Reference LE** dropdown, select the **Learning Element** which you want the **Certificate** awarded for.

The **Available Tokens** link opens a window that contains all the valid Certificate tokens that can be used for the LMS. This is where we selected the particular Tokens used for this example. A list of available Tokens is included below for your reference.

Accord LMS

Advanced Settings

LE Type: ⓘ	Certificate ▾
Learning Element Format: * ⓘ	Certificate - Modal Window - 950x650 ▾
Utilization Tracking: ⓘ	None ▾
Reference LE: ⓘ	LMS Learner Quiz ▾
Available Tokens: ⓘ	View
Custom Window Dimensions: ⓘ	☐
Expected Duration: ⓘ	☐

LEID: ⓘ	n/a
Local ID: ⓘ	n/a
Reference: ⓘ	
Status: ⓘ	⦿ Active ○ Inactive
Views: ⓘ	0

Token	Description
[Learner:FullName]	Learner´s Full Name composed of first
[User:DisplayName]	Display Name of the currently logged in
[User:Email]	Email Address of the currently logged in
[User:FirstName]	First Name of the currently logged in us
[User:LastName]	Last Name of the currently logged in us
[User:Username]	Username of the currently logged in use
[Profile:Property]	Displays any Profile Property, even cust
[Membership:Approved]	Shows if the user is Approved.
[Membership:IsOnline]	Shows if the user is Currently Online.
[LE:CompletionDate]	Shows the Completion Date of the Last
[LE:CompletionStatus]	Shows the current Completion Status of Progress or Complete).
[LE:Description]	Displays the Learning Element Descripti
[LE:Duration]	Shows the Learning Element Expected D

Token	Description
[LE:EU]	Shows the Education Units awarded by
[LE:FolderId]	Displays the ID number of the Folder co
[LE:FolderName]	Displays the Folder Name containing the
[LE:LEID]	Displays the ID number of the Learning
[LE:Reference]	Shows the Learning Element set as Refe
[LE:Score]	Learning Element Score: shown as a dec
[LE:ScorePercentage]	Learning Element Score: shown as a per
[LE:Status]	Shows a marge of the values from Succe Attempted, In Progress, Complete, Pass
[LE:SuccessStatus]	Shows the current Success Status of the Failed).
[LE:Title]	Displays the Title of the Learning Eleme
[LE:Format]	Displays the Learning Element Format.
[EA:EA Name:[Profile:CustomStartDate]:[Profile:CustomEndDate]]	Education Activity points for "EA Name", fixed date. The date must be in the follo [EA:Education Activity:[Profile:EAStartDate|yyyyMMdd
[EALIST:FORMAT]	List of Educational Activities for the Refe The field must be multi-line and enough Tokens supported in the Format section the points earned by the learner with in description of the EA, [EOL] to start in a [EAPoints][EOL]]
[DATEADD:TIMESPAN]DATE[/DATEADD]	Adds a timespan to a date. The date car (a)Y(b)M(c)D(e)H with (a), (b), (c) and (e) t hours to add to DATE as needed (don't r order 2Y6M is valid and equivalent to 6N
[REF:CompletionDate]	Shows the Completion Date of the Last Element.
[REF:CompletionStatus]	Shows the Completion Status (Not Atter Reference Learning Element.
[REF:Description]	Shows the Description of the Reference

Token	Description
[REF:Duration]	Displays the total Duration of the Refere
[REF:EU]	Shows the Education Units of the Refere
[REF:FolderId]	Includes the Folder Id where the Refere
[REF:FolderName]	Includes the Folder Name where the Re
[REF:LEID]	Shows the Reference Learning Element
[REF:Reference]	Brings up the information introduced in Element.
[REF:Score]	Referenced Learning Element Score: sh
[REF:ScorePercentage]	Referenced Learning Element Score: sh
[REF:Status]	Shows a marge of the values from Succe Attempted, In Progress, Complete, Pass
[REF:SuccessStatus]	Shows the current Success Status of the Failed).
[REF:Title]	Displays the Title of the Reference Learn
[REF:Type]	Displays the Learning Element Format.
[DateTime:Now]	Shows the current date and time.
[Ticks:Now]	Displays the CPU Tick Count for the curr
[Ticks:Today]	Displays the CPU Tick Count since Midni
[Ticks:TicksPerDay]	Displays the CPU Ticks per Day (for calc
[Portal:Currency]	Shows currency string being used by the
[Portal:Description]	Shows the Portal Description.
[Portal:Email]	Shows the Portal Admin Email address.
[Portal:FooterText]	Displays the Portal Copyright Text.
[Portal:HomeDirectory]	Shows the Portal (relative) path of Hom
[Portal:LogoFile]	Shows the Portal Path to the Logo file.
[Portal:PortalName]	Display the Portal Name.

Token	Description
[Tab:Description]	Shows the Page Description Text for the
[Tab:FullUrl]	Shows the Complete URL of the Page.
[Tab:IconFile]	Shows the Page relative path to the Icon
[Tab:KeyWords]	Lists the Keywords of the Page for the S
[Tab:TabName]	Displays the Page Name.
[Tab:TabPath]	Shows the Page Relative Path.
[Tab:Title]	Displays the Page Title (Window Title).
[Tab:URL]	Shows the Page URL.
[Module:Description]	Displays the Module Definition Descript
[Module:Footer]	Shows the Module Footer Text.
[Module:FriendlyName]	Displays the Module Definition Name.
[Module:Header]	Shows the Module Header Text.
[Module:HelpUrl]	Shows the Module Help URL.
[Module:IconFile]	Displays the Module Path to Icon File.
[Module:ModuleTitle]	Shows the Module Title.
[Module:PaneName]	Shows the Module Name of the Pane w

- From the **Learning Element Type** dropdown, select **Certificate**.

- Click **Update** to save changes and create the certificate.

Course Certificate_English.pdf

Advanced Settings ⌄

Education Activities ⌄

Update   Cancel

Since the Certificate is a Learning Element, just like any of the other Learning Elements, it will need to be enrolled to a Learning Role or to specific Learners so that it will display in the Learner´s 'My Courses'.

Testing the Certificate

Log in as a Learner into your site and navigate to the folder where you have added the Certificate. **Important:** The Learning Element to which this certificate is attached needs to have **completed attempts** in order for the certificate to work properly.

- Click the **Launch** button belonging to the Certificate.

The Certificate will display the data extracted from the LMS.

OpenSesame - The Learning Marketplace

What is OpenSesame?

OpenSesame is an online marketplace which can be used to quickly obtain and utilize various types of online training courses or activities.

The OpenSesame course library is directly integrated with the Accord LMS Portal.

Browse and select from 20,000 different courses to get Learners trained quickly and efficiently.

Topics can range from Hazardous Waste Disposal, Microsoft Outlook and Excel programs or courses concerning Workplace Discrimination.

The process works by selecting a number of Seats and the new courses are automatically loaded into your existing Accord LMS learning Catalog.

Once courses are added, Learners can be immediately Enrolled and begin utilizing these courses.

Pertaining to any added OpenSesame courses, any Accord LMS Reporting features remain exactly the same as with any of the other Learning Elements within your LMS learning Catalog.

Get Your New Courses

The following example demonstrates how to select bundles of learning material to download from **OpenSesame**.

Content is grouped into convenient bundles which allows for the picking and choosing of specific types of Learning Content without needing to download an entire catalog of courses; significantly minimizing cost.

> **!** Before you may access the **OpenSesame Marketplace**, you will need to create and configure an OpenSesame Account.
>
> For help to configure your Accord LMS to incorporate the OpenSesame Marketplace into your Accord LMS, please refer to; [OpenSesame - Configuration](#)

To Add Courses you will Select a Course Bundle

The **OpenSesame Marketplace** is located near the bottom of the **LMS Admin > Catalog** page.

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.

- Click on the **Catalog** tab.
- Scroll near the bottom of the Catalog Page and click on the **OpenSesame** header to open it's panel.

- Click **Load Marketplace**.
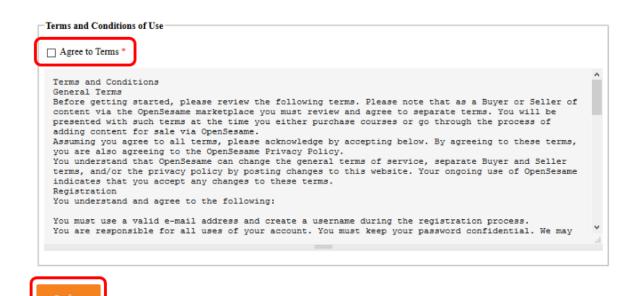
At first launch you will be prompted to **Agree to Terms and Conditions of Use**.

- Check box next to **Agree to Terms.**
- Click **Confirm**.
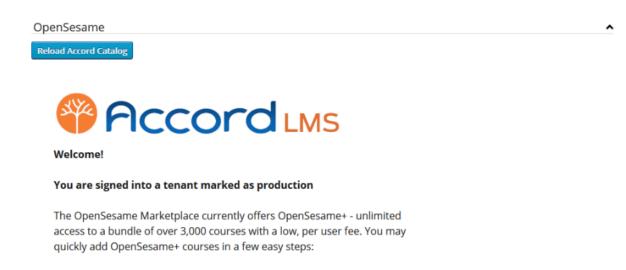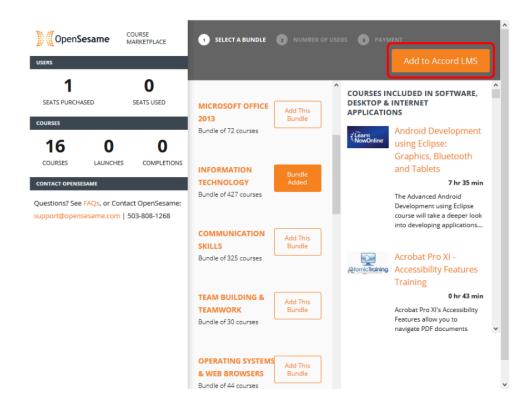
- Click **Get Started**.

- Select which Course bundles you want to sync.
- Click **Add to Accord LMS**.
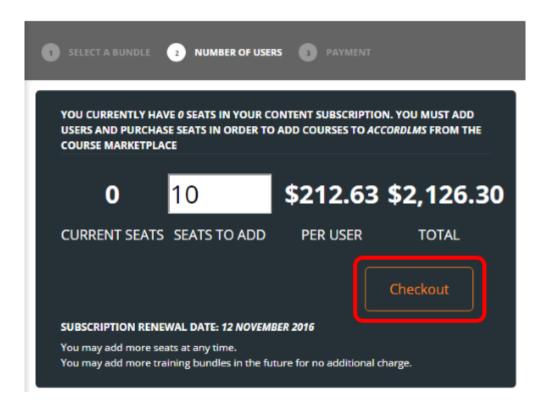
Number of Users

- Input the number of Seats (Learners) you wish to purchase.
- Click **Checkout**.

Note: More seats can be added as needed.

Payment

- Fill out payment information and click **Complete Purchase**.
- The syncing process will commence immediately.
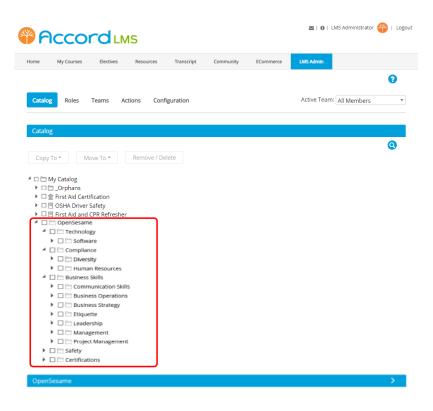
- Once the sync process is complete, click **Reload Accord Catalog.**
- The new **OpenSesame** courses will immediately load into your existing Accord LMS learning Catalog.

Immediately Utilize Your New Learning Content

- The new content is ready to be Enrolled and utilized by your Learners.
- Just as with any other Learning Elements, it can be dragged and dropped into any existing Learning folder within the LMS learning Catalog.

More information can be found in our blog: https://www.accordlms.com/blog/5/20-000-courses-available-instantly

Remote SCO Learning Content

LMS Admins have the ability to conveniently establish and manage remote SCO Learning Content.

Thru the **Remote SCO** feature built into the Accord LMS, selected SCO material can be readily shared with and utilized by Learners of your choosing while simultaneously protecting this same SCO material from being accessed by non-selected or non-authorized Learners.

What is the purpose of Remote SCO?

The Remote SCO feature can be used to share specific SCORM learning content with an external Learning Management System.

The Accord LMS provides the necessary tools to manage licensing which then limits the number of completions or allotted time periods available for any Users utilizing a third-party LMS.

Thru the Remote SCO feature, any Learners utilizing a third party LMS will be accessing selected SCO learning content from the Accord LMS where it was originally created or stored.

This feature provides content authors with the ability to distribute their content without relinquishing any control to it's access.

Any SCORM Learning Elements within the Accord LMS Learning Catalog can be utilized to create Remote SCO files for any number of external LMS systems. Most external LMS systems can utilize Remote SCO files.

Adding and Setting up SCO Content for Managing Remote SCO Access

The example below will demonstrate how to properly add and manage any Remote SCO learning content.

Note; *this example will demonstrate how to quickly setup and manage Remote SCO content. For further general information regarding SCORM type learning elements, please see;*

Learning Element Types *at;* http://help.accordlms.com/m/11168/l/763571-learning-element-types

STEP ONE: Establish a Team to Facilitate Remote SCO Content

To establish a Team which can then facilitate **REMOTE SCO** learning content**;**

- Go to **LMS Admin** tab **> Teams** tab.
- Using either the top **All Members** team or an existing Child Team, click on the Team to open it's context menu.

- Click on **New Child Team**

Ensure the appropriate larger **Active Team** has been selected by using it's associated dropdown menu.

*Note; if using a preexisting Team to facilitate any Remote SCO content, go to **LMS Admin** tab > **Teams** tab, click on desired Team to open it's context menu and then click on **Team Details** to access the **Remote SCO** panel. For balance of directions please continue reading.*

Once the **NEW CHILD TEAM** panel opens (same as **Team Details** panel);

- **Team Name:** Type a required Team Name.
- **Include Group:** Check box if you want to provide members of this Team with their own Group.
- **Parent Team:** This will identify the Parent Team of this new Child Team.
- **Description:** Add optional description or helpful notes.
- **Reference:** Optional reference field normally used for administrative purposes.

RULES: if desiring to add membership rules for this Team, click on heading to open section.

- **Rule:** Using the associated dropdown menu, select a specific Rule necessary for Users to qualify for Team membership. Choose from selected qualifying criteria such as email, name, prefix, State, zip-code , etc.
- **Add New Parameter:** Click to add any supplemental parameters necessary to qualify for Team membership.
- **Add New Rule:** Establish additional Rules as necessary.

REMOTE SCO: If necessary click heading to open.

- **Enable Remote SCO:** Check box to enable the Remote SCO.
- **Remote LMS URL:** This field must contain the URL of the external LMS where the SCO content will be published.*

*Important Note: The Accord LMS Server must be able to conduct HTTP Requests for this specific URL.

- **Update:** Click Update to save changes and create Team capable of facilitating Remote SCO learning content.

*Hovering mouse over information icons displays helpful tips.

STEP TWO: Add any SCO Desired for Remote Access

The following image represents a typical Learning Catalog of the Accord LMS when accessing the **LMS Admin** tab **> Catalog** tab.
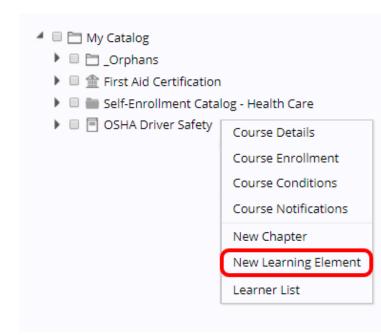
Ensure the larger **Active Team** has been selected by using the adjacent dropdown menu.

Create or select a folder from the Learning Catalog to add your desired SCO learning content, also referred to as a Learning Element.

For this example we will add the desired Remote SCO content to the **OSHA Driver Safety** learning folder.
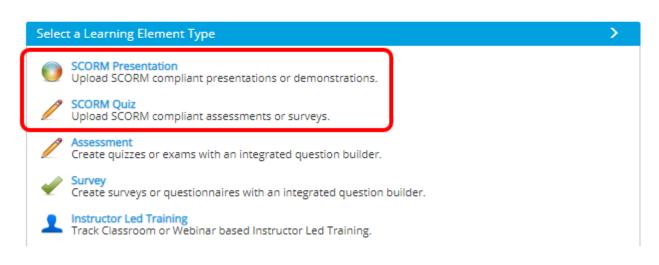
- Click on the learning folder you wish to place Remote SCO content into. This will open it's context menu.
- Click on **New Learning Element**.

When the **New Learning Element** window displays;

- Click on either **SCORM Presentation** or **SCORM Quiz**.

When the **New Learning Element** panel opens;

- **Name:** Enter a name (non-optional).
- **Learning Element Format:** Using the associated dropdown menu, select desired format.
- **Custom Window Dimensions:** Check box to edit any desired custom window dimensions.
- **Enable Proctoring:** Check box to enable proctoring.
- **Description:** Enter an optional description.
- **SCO:** In the SCO field, click **Select** to choose the SCO object you wish to upload from your computer system.
- After uploading your desired SCO content, click on the **Remote SCO** heading to open this panel if necessary.

Once the panel opens, use the associated dropdown to select the specific **Team** you desire to provide the remote access for your chosen SCO learning content.

For this ongoing example, we will select the Team we created for this purpose from above and select **Driver Safety Remote SCO**.

After you select the desired Team, the panel will refresh, displaying various data fields.

Team: Select a Team to create the Remote SCO. The selected Team will specify the URL for the Remote LMS.

Please Note; Selected Team must be a Child Team under the All Members Team.

Enabled: If disabled, any attempt records from Remote Learners are rejected.

Maximum Completions: This represents the maximum allowable number of completions intended for this Remote SCO. When this limit is reached, no new attempt records are accepted. A number between 1 and 999,999 must be entered.

Current Completions: This figure represents the number of current completed records for this Remote SCO.

In Progress: This figure represents the current number of 'In Progress' records for this Remote SCO. In progress means a given Learner has opened the Remote SCO but not yet finished.

Expiration: Any attempt records for this Remote SCO are rejected after the expiration date.

Last Updated: Specifies the date this Remote SCO was last updated.

Update By: This indicates a particular LMS Admin individual who last updated this Remote SCO.

- Click **Create** when finished to save changes and create the **Remote SCO**.

After creating, scroll near bottom and click **Update**.

Managing any Remote SCO

Once any Remote SCO learning content has been established, any editing or management of this Remote SCO content is conducted from the Configuration panel.

- Ensure the proper **Active Team** is selected.
- Go to **LMS Admin** tab **> Configuration** tab
- Click on **Remote SCO**.

Once the **Remote SCO** panel opens;

- Locate and click on the **Team** you wish to update or edit any Remote SCO for.
- Click on **Details**.

- Locate the Remote SCO content you wish to edit and click on it's adjacent pencil icon.

Once the edit panel displays;

- Make updates or changes.
- Once finished, click **Update**.
- After updating, scroll near bottom and click **Return**.

Turning any Existing SCO Content into Remote SCO

For converting any existing Learning Catalog SCO type learning content into SCO which may be accessed remotely;

- Locate the desired SCO content from it's associated Learning Catalog folder.
- Click on this Learning Element to open it's context menu.
- Click on **LE Details**

- Once the **LE Details** panel opens, scroll down and click on **Remote SCO** to open this panel.

Once the panel opens, use the associated dropdown to select the specific **Team** you desire to provide the remote access for your chosen SCO learning content.

After you select the desired Team, the panel will refresh, displaying various data fields.

Team: Select a Team to create the Remote SCO. The selected Team will specify the URL for the Remote LMS.

Please Note; Selected Team must be a Child Team under the All Members Team.

Enabled: If disabled, any attempt records from Remote Learners are rejected.

Maximum Completions: This represents the maximum allowable number of completions intended for this Remote SCO. When this limit is reached, no new attempt records are accepted. A number between 1 and 999,999 must be entered.

Current Completions: This figure represents the number of current completed records for this Remote SCO.

In Progress: This figure represents the current number of 'In Progress' records for this Remote SCO. In progress means a given Learner has opened the Remote SCO but not yet finished.

Expiration: Any attempt records for this Remote SCO are rejected after the expiration date.

Last Updated: Specifies the date this Remote SCO was last updated.

Update By: This indicates a particular LMS Admin individual who last updated this Remote SCO.

- Click **Create** when finished to save changes and create the **Remote SCO**.
- As a last step, click **Update** at bottom.

YouTube Learning Element

Add a YouTube Video Learning Element

Youtube
Youtube video.

YouTube Videos can be added into your Accord LMS Learning Catalog to be used as Learning Elements for any selected Learners.

Once a YouTube Video Learning Element has been added to the Catalog, it can be easily deleted, edited or substituted with an updated video.

To add a YouTube Learning Element;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the Folder you wish to add the YouTube video to open it's context menu.
- From the menu, click on **Add Learning Element**.

The Learning Element Type page will open.

- **Select YouTube Video.**

General Settings

Waving a mouse over information icons will display helpful tips.

Only fields within General Settings are necessary to create a YouTube Learning Element. Fields in subsequent panels are optional.

Name (non-optional): Enter a name for this Learning Element.

Learning Element Format: Using the dropdown menu, you can select different play formats. The YouTube preset default Modal Window of 1280 x 720 will work for most YouTube videos.

Custom Window Dimensions: Clicking this box will allow you to customize width and height dimensions.

Enable Proctoring: Checking this box will allow this Learning Element to be Proctored. Only available for LE Formats with Popup or Modal launch windows.

Description: Enter an optional description to help define or describe this Learning Element.

YouTube URL: Enter the **URL link** of the YouTube Video into this field.

New Learning Element

Advanced Settings

*Waving a mouse over information icons will display helpful tips.

Learning Element Type: Using the dropdown menu, select the type for this Learning Element. If YouTube video, you can leave it set to YouTube.

Utilization Tracking: Using the dropdown menu, select desired tracking. Options are;

- **"In Progress" on Open:** This option will record "In Progress" if the launch window is opened. This option assumes an LMS Admin will later assign a final completion status.
- **"Complete" on Open:** This option records "Complete" if the launch window is opened.
- **"Complete" on Close:** This option records "Complete" if the launch window is opened and closed.
- **"Complete" on Expected Duration:** This option records "Complete" if the launch window is closed after the estimated duration period has elapsed.
- **None:** This option records no utilization.
- **None - Resource:** This option records no utilization and defines this Learning Element as a resource.

Expected Duration: Expected duration of the Learning Element in minutes.

LEID: Learning Element ID.

Local ID: Value of local Learning Element auto-increment field. This will be a unique value within a given LMS portal.

Reference: Optional reference field typically for administrative use.

Status: Active Status will display this LE for Learners. Inactive Status LE are hidden from Learners.

Views: This represents the number of times this Learning element has been viewed.

Publish Date: This Learning Element will begin to display for Learners on this publish date.

Unpublish Date: This Learning Element will not display for Learners after this date. Leave blank for unlimited publication.

Tags (separated by commas): Enter optional Tags or phrases to assist Learners in finding this Learning Element whenever using the search field feature.

Utilized in Folders: Initially this section will display no Folders. After any utilization, any Folders which utilized this Learning Element will display here.

Education Activities

*Waving a mouse over information icons will display helpful tips.

Education Activities: Education Activities are typically types of continuing education units (CEU'S) recognized through various organizations.

- **Award Requirements:** Use the dropdown menu to select conditions necessary for a Learner to qualify for award requirements. Options are **Complete**, **Pass**, **Complete or Pass** or **Complete and Pass**.
- **Education Units:** This is a default education activity.

Note; you have the option of adding new Education Activities for varying types of CEU's.

Sometimes varying types of professional associations will use their own terms or own acronyms for CEU's.

For online help documentation explaining how to easily add new Education Activities, please refer to; Education Activities

- **Update:** After entering your information and establishing any settings for this YouTube Learning Element, scroll to bottom and click **Update**.

Editing or Updating a YouTube Video Learning Element

To Edit or Update an existing YouTube Learning Element;

- Ensure the proper **Active Team** is selected; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the YouTube video you wish to edit to open it's context menu.
- From the menu, click on **LE Details**.

Make desired changes.

If choosing to substitute an existing YouTube video with another, simply post the new video URL into the **YouTube URL** field.

- **Update:** When finished, scroll to bottom and click **Update**.

Deleting a YouTube Video Learning Element

To Delete a YouTube Learning Element;

- Ensure the proper **Active Team** is selected; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the YouTube video you wish to delete to open it's context menu.
- From the menu, click on **LE Details**.

- Once the LE Details panel opens. scroll to bottom and click **Delete**.

Note; if you wish to remove the YouTube Learning Element from it's associated Folder but still keep it available for potential future use, click **Remove From Folder**. This will store this YouTube video in the **Orphans Folder** inside the Catalog for any future usage, should this exact same Learning Element not already exist in another Catalog Folder.

Searching for Learning Content within the Catalog

Finding Learning Content

Once your Catalog is populated with your various forms of Learning Elements, the on-page search function makes them easy to locate.

What are your current Search Settings?

To ensure you can easily locate the learning content you're looking for, it might be advisable to first check how your search settings are established within Configuration.

To check present Search Settings;

- Ensure the proper **Active Team** is selected; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- Click on **General Options**.

Once the page refreshes, inside General Options scroll to the heading for **Search** and click to open.

You will see check boxes next to **Index Title**, **Index Tags**, **Index Description** and **Index Body**.

Please understand, the search function indexes for terms related to Learning Elements or learning content, not the hierarchical storage Folders they might be contained within.

For common search functionality, it is typically recommended to check boxes for Index Title, Index Tags and Index Description. This allows search results to display any folders having your desired search term contained within a Learning Element's Title, Tags or Description.

Checking the box for **Index Body** typically provides search results which are far too broad.

Should you desire to search for a Learning element's Title only, check only the box for **Index Title**.

- After establishing your desired search settings, scroll near bottom and click **Update**.

Note; depending on your particular Accord LMS and the volume of re-indexing which needs to be performed, the re-indexing process may take several seconds.

Searching

To locate desired Learning Elements associated with a given term;

- Ensure the proper **Active Team** is selected; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the round blue **Magnifying Glass** icon to open the Catalog search field.

Enter a selected term into the search field which you're looking for and click the blue Magnifying Glass icon or hit Enter on your keyboard to begin the index search.

Once the search function runs and the page refreshes, any Folders which contain any Learning Elements associated with your entered search term will display.

Click on the arrows next to the displayed Folders to see their contained Learning Elements which have your search term.

Partial Search Terms

In the event you might only know a partial spelling or only a portion of a word your searching for, type what you know into the search bar followed by an asterisk, also called a wildcard.

- Click on the Magnifying Glass or hit Enter on your keyboard to initiate the search function.

Grading a Learner Uploaded Assignment
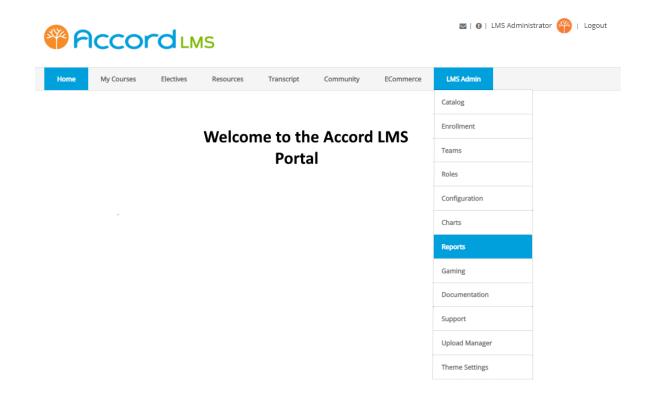
How to Grade an Assignment which has been Uploaded by a Learner

Amongst the various types of Learning Elements, there is a type referred to as **Assignment Upload**.

Utilizing this type of Learning Element will allow a Learner to upload an assignment file into the LMS for subsequent review and grading; either by an instructor or by an LMS Admin.

To review and/or grade a file which has been uploaded by a Learner;

- Wave-over the **LMS Admin** tab and click on **Reports**.

If a defined report type for Assignment Uploads does not already exist;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Under **Quick Reports - LE Activity with Learner Detail**, in the dropdown menu select **Define New Report** and click **Continue**.

Under Definitions;

- **Name** your Report Definition.
- Select which **Teams** will maintain view permissions for this Report.

Under Filters;

- Under the **Learners** tab; use buttons to select from **Users**, **Roles** or **Teams** and choose which segments of Learners will be included in this Report.
- Under the **Content** tab; select which specific Learning Elements will be included in this Report.
- Under the **Date** tab; select the inclusive dates for this Report.
- Under the **Columns** tab; select the specific data columns you wish to display for this Report.

- Under the **Columns** tab; ensure box for **Assignment Grading** is checked.

After establishing your desired settings;

- Near the bottom of the Definitions panel, click **Create**.

Now that your defined Report exists, or if such a Report already existed;

- While under the Reports tab, click on your report established to gather data for Assignment Upload and click **Continue**.

Once the Report opens;

- Scroll downward and locate the specific user's assignment file upload you wish to grade. Scroll to the far right on the row for this user's assignment, locate the Learner's uploaded file and then click on it.

- Once perusing the uploaded file, you may check the box for **Completed**.
- Use the dropdown menu for **Success Status** to select from **Passed** or **Failed**.
- Enter an optional **Score**.
- Unless you choose to enter a specific **Date**, the date which reflects will be the original date and time the Learner originally uploaded the file.
- After making your selections, click **Update**.

Please note; the **Comments** field is strictly comments for LMS Admin personnel, not comments forwarded to Learners who upload assignments.

After clicking Update, any involved data columns will then reflect on a generated report.

Instructor Led Training (ILT)

ILT Learning Elements

Accord supports **Instructor Led Training (ILT)** sessions to offer instructor-led teaching options.

Each **ILT** can have single or multiple Sessions.

Each Session has a Learner Roster which can be used for quick Learner status updates.

ILT is a form of Learning Element.

For more information explaining the various types of Learning Elements, please see; Learning Elements.

To add a new **Instructor Led Training (ILT) Learning Element;**

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Navigate to **LMS Admin** tab.
- Click on the **Catalog** tab.
- Locate the folder where you want to add the new **ILT** to open it's context menu.
- Select **Add Learning Element** from menu.

- Select **Instructor Led Training.**

- **Name:** (required) Enter a name for the **ILT** Learning Element.
- **Description:** Enter an optional description.
- Click **Update** to save and create the new ILT Learning Element.

After update your newly created ILT Learning Element will now display in the folder it was created in.

Advanced Settings

If necessary, click heading to open **Advanced Settings**.

- **Learning Element Type:** You can use the dropdown menu to change the Learning Element Type. Changing the LE Type will result in the loss of the Learning Element detail settings, but will not affect Enrollments, Attempt Records or any Education Activities, should they exist.
- **LEID:** This is the **unique** identification string (made up of alpha and numeric characters) assigned to the Learning Element once it has been added to the Catalog. It is used to identify the Learning Element. Initially the LEID is always **n/a**.
- **Local ID:** This is the value of a local Learning Element auto increment field and a unique value within the portal assigned to a Learning Element after creation. Initially it will be **n/a**.
- **Reference:** This is an optional reference field typically for administrative use. It may be left blank.
- **Status:** Active status allows this Learning Element to be used by Learners. Inactive status will hide this Learning Element from Learners, though it will still be visible to LMS Admin.
- **Multiple Session Registration:** If checked, allows Learners to be registered for multiple sessions.
- **Views:** This will display the number of views for this learning element. Always begins at zero.
- **Publish Date:** Enter a publish date in the provided field. This ILT Learning Element will only be available to Learners beginning on this date. You may click the calendar link to select a date. If left blank, will be available immediately.
- **Unpublish Date:** This Learning Element will stop being displayed to Learners on this date. You may click the calendar link to select a date.
- **Tags (separated by commas):** Type in words or phrases to identify this ILT Learning Element to help Learners locate when using the search function. Separate each word or entire phrase by a comma.

Click **Update** to save settings for this ILT Learning Element.

Education Activities

Click on **Education Activities** heading to open panel.

- **Award Requirements:** Use dropdown menu to specify the necessary requirements for Learners to qualify for any Education Activities awards. The potential choices are **Complete**, **Pass**, **Complete or Pass**, **Complete and Pass**.
- **Education Units:** Total Amount of Education Units to be awarded to Learners. Standard Education Units are available in reports.
- Click **Update** to save any setting changes for this ILT Learning Element.

Please Note; The Proper Workplace Conduct field displayed in the image below is only a sample type of Education Activity of which many types can be added.

For help documentation to add new types of Education Activities, please link to; [Education Activities](#)

Education Activities

Award Requirements: ⓘ [Complete or Pass ▾]

Education Units: ⓘ [_____]

Proper Workplace Conduct: ⓘ [_____]

[Update] [Cancel]

ILT Sessions

Each Instructor Led Training (ILT) Learning Element can have unlimited sessions.

To create new sessions;

- Ensure the proper **Active Team** is selected by using the associated dropdown menu; should more than one Active Team exist.
- Navigate to the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the desired ILT Learning Element and select **LE Sessions** from it's context menu.

- The **LE Sessions** panel will display.
- Click **Add New Session**.

The **New Session** panel will display.

Under General Settings;

- **Name:** (required) Enter a name for this session.
- **Start Date Time:** Select the Start Date for the Session. If recurrent, select the Start Date for the first Session.
- **End Date Time:** Select Session End Date. If recurrent, select End Date for last Session.
- **All Day:** Check this box to allow this Session to be an all day event.

Sessions can be one instance only or can reoccur Daily, Weekly, Monthly or even Yearly.

Checking the **Recurrence** option box will open a scheduling panel to allow for an LMS Admin to spread a particular session across one or more days from a week, month or year.

An LMS Admin can also make Sessions repeat over a predetermined period of time and end any Sessions after a chosen number of Sessions have occurred.

- **Time Zone:** The dropdown contains a list of several different time zones according to each geographical area. Select an appropriate time zone.
- **Location:** Select a Location which is available for the Active Team.

Different ILT locations can be added by following the steps described in the [Resources](#) section of the **Configuration** chapter of the **LMS Admin Guide**.

Instructor: Select an Instructor which is available from the Active Team.

Different Instructors can be added by following the steps described in the [Resources](#) section of the **Configuration** chapter of the **LMS Admin Guide**.

Under Notifications;

This section will allow an LMS Admin to establish various types of notifications for new ILT Sessions.

- **Session Registration (for Learners):** This will send any Learners a notification when registered to this Session; either by self or by an LMS Admin.
- **Session Registration (for Instructor):** This will send this Session's instructor a notification whenever a Learner registers for their Session.

Under Advanced Settings;

- **Description:** Add a brief description for this Session (optional).
- **Tags:** Enter any logical tags or terms so that Learners may locate this particular session whenever using the search function (optional).
- **Max Learners:** Enter the Maximum number of Learners that can attend this particular session.
- **Min Learners:** Enter the Minimum number of Learners required for this session to activate and take place.
- **Team Filter:** Visibility of this Session will be limited to any selected Teams. Learners must be Enrolled into this Session for it to display in their **My Courses**.
- **Calendar Invite:** By checking this box, an **Add to Calendar** link will display to Learners when accessing the Session Details. By clicking this link, a **.ics** file will download which can be added to a User's local computer calendar.
- **Calendar Invite Body:** Enter a session description text which will display within the Calendar Invite Body.
- **Available Tokens:** List of Tokens available for the Calendar Invite Body customization.
- **Calendar Reminder:** Use the dropdown list to select the amount of time you want calendar events to remind users before the event. Users can customize any reminders when adding this event to their personal calendars.
- **Enable Waitlist:** Checking this box will allow Learners to be Wait-Listed whenever a Max Learners count for a given Session has already been reached.
- **Autofill from Waitlist:** This will auto-fill registered Learners for a Session should seats become available either through cancellations or by number of available seats being increased.

Click **Update** to save session.

The new session will now list under the Instructor Led Training Learning Element sessions list along with it's Name, Start Date, Location, Instructor, Minimum Learners, Maximum Learners and Current Learners.

Export: If necessary, export a list containing this session's related information. Use available export options in the upper right hand corner.

Edit Sessions

LMS Admins can review or change specific details for a given session after it's been created by accessing a Session's context menu.

- Ensure the proper **Active Team** is selected by using the associated dropdown menu; should there be more than one Active Team.
- Navigate to the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the desired session and select **Session Details** from it's context menu.

The **Session Details** panel will open. Perform any necessary changes.

When editing a session, the notifications section will allow you to include a **Session Update - Send Now** notification which can be sent to both Learners and Instructors by checking their associated boxes.

Boxes will clear after messages have been sent.

Enter an optional message in the **Description** field which will be sent at the same time as any update notifications.

- Click **Update** to save any changes.

Copy Sessions

- **Click** on the session you want to copy.
- Select **Session Details** from it's context menu.

- In **Session Details**, click the **Copy** button.

The copied session will now display directly under the session it was copied from.

Delete Sessions

Important Note Regarding the Deletion of any ILT Sessions; Any Learners which are registered for any given Session must be dropped prior to any session deletion.

There are two methods to delete a Session.

One method is to delete a session directly from the Catalog Page;

- Ensure the proper **Active Team** is selected by using the associated dropdown menu; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Catalog** tab.
- **Check the box** next to the session you want to delete.
- Click the **Remove/Delete** button.

The other method to delete a session is by entering it's Session Details panel;

- **Click** on the session you wish to delete to open it's context menu.
- From the menu select **Session Details**.

In the details panel, scroll to bottom and click Delete.

Learner List

The Learner List is an easy method to determine which Learners or Users have been enrolled to a given Instructor Led Training (ILT) Learning Session.

- Ensure the proper **Active Team** is selected by using the associated dropdown menu; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the desired **ILT Learning Session** to open it's context menu.
- Click on **Learner List** from the menu.

The Learner List will help you to determine, not only who is enrolled, but which method they were enrolled through.

The Learner List will display which shows any enrolled Learners; to include Enrollment Type, Folder Title, Rolename and Team.

You have the ability to drag a column header to the top row to preferably group.

Session Details

Accessing Session Details will assist in the proper administration of any ILT Learning Session.

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Navigate to the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Locate and click on the desired ILT Learning Session to open it's context menu.
- Click on **Session Details**.

The **Session Details** window will display **General Settings, Notifications** and **Advanced Settings.**

Here you can set any necessary details in order to properly administer your ILT Learning Session.

Click on **Notifications** or **Advanced Settings** to open their sections if necessary.

General Settings

Helpful Information Icons: Hovering your mouse over the information icon next to any specific detail type will provide helpful tips for that detail type.

Name: Enter a name for this session.

Start Date Time: Select the Start Date for the Session. If recurrent, select the Start Date for the first instance of the Session.

End Date Time: Select the End Date for the Session. If recurrent, select the End Date for the last instance of the Session.

Recurrence: (Please scroll below to see more information for this detail type.)
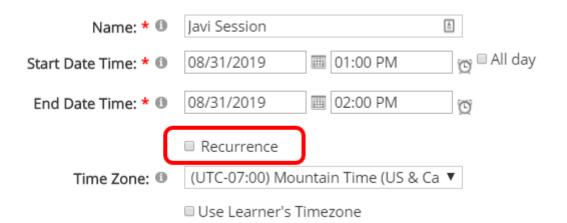
Time Zone: Select the proper time zone for the location of the Session.

Location: Use the associated dropdown menu to select from predesignated locations.

Instructor: Use the associated dropdown menu to select from predesignated Instructors.

Recurrence

Click on the Recurrence box to open this detail section.

Recurrence details window will display.

Here you can set a given ILT Learning Session to recur on an Hourly, Daily, Weekly, Monthly or Yearly basis.

Ensure to always click Update at bottom to save any changes.

Notifications

Notifications

- Session Registration (for ⓘ Learners):
- Session Registration (for ⓘ Instructor):
- Session Update - Send Now (for ⓘ Learners):
- Session Update - Send Now (for ⓘ Instructor):

Click on **Notifications** heading to open section if necessary.

Helpful Information Icons: Hovering your mouse over the information icon next to any specific detail-type will provide helpful tips for that detail-type.

Session Registration (for Learners): Send a registration notification whenever a Learner or User is registered for a Session, whether registered by self or by an LMS Admin.

Session Registration (for Instructors): Send a registration notification whenever an Instructor is registered for a Session, whether registered by self or by an LMS Admin.

Session Update - Send Now (for Learners): Send all registered Learners an Update Notification whenever any details of a given Session are updated. A notification will send immediately upon submitting the update. The checkbox will clear after submit.

Session Update - Send Now (for Instructors): Send all registered Instructors an Update Notification whenever any details of a given Session are updated. A notification will send immediately upon submitting the update. The checkbox will clear after submit.

Advanced Settings

Click on **Advanced Settings** heading to open section if necessary.

Helpful Information Icons: Hovering your mouse over the information icon next to any specific detail-type will provide helpful tips for that detail-type.

Description: Optional. Use either the Basic Text Box or the Rich Text Editor to provide a brief description for the Session.

Tags: You may optionally enter any tags or terms you find suitable to help your Learners locate this particular session when using the search function.

Max Learners: Enter the maximum number of Learners that may attend this particular Session. Leave blank for unlimited.

Min Learners: Enter the minimum number of Learners needed to participate in this particular Session in order for it to take place.

Team Filter: Visibility of this Session will be limited to the selected Teams. A given Learner must be enrolled for this Session before it will display in their **My Courses**.

Calendar Invite: Clicking this box will send an Add to Calendar link to Learners when accessing Session Details. An .ics file will download that can be added to the User's local computer calendar.

Calendar Invite Body: Session description text to be placed into the Calendar Invite Body.

Available Tokens: Tokens available for the Calendar Invite Body customization.

Calendar Reminder: The amount of default time you want calendar events to remind users prior to an upcoming Session. Users will be able to edit their own reminder times when adding the event to their calendar.

Enable Waitlist: Allow wait-listing whenever a Session may reach a set Max Learner limit.

Version History: Session creation date to include any revisions.

Click Update to Save Changes.

Session Roster

A **Session Roster** is a list of all Learners who are registered for a particular Instructor Led Training (ILT) session.

To access the ILT Session Roster;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the desired ILT Session and select **Session Roster** from it's context menu.

The **Session Roster** screen displays.

Learners registered for this session will displayed in this list along with their **Registered** Status.

The LMS Admin can also update the Learner Status to **In Progress** if the session has not yet been finished or **Completed** if the session has been successfully accomplished. You can also delete any Learner registration by changing the Status to **Not Registered**. Any changes made to the Session Roster will reflect in Learners' **My Courses**.

When the status is set to **In Progress** or **Completed**, the Score and the Pass/Fail columns become active. These columns allow LMS Admin to send either a **Passed** or **Failed** flag to the Learner registered for this session, along with their session score. **Status Date** may be changed to match the completion date.

Filtering and grouping options are available to assist in viewing data in a preferred format.

- **Drag and drop** a column header to the upper box of the grid to preferably group data.

More than one column header may be dragged upwards to group data.

Once completing any desired changes;

- Click **Save Data**

A message will display confirming that: **All checked row data has been successfully saved**.

- Click **Ok**.

- **Include Available Candidates:** When checking this box, the form refreshes to include **all Candidates**. Candidates are all Enrolled Learners who were not formerly selected.

As an LMS Admin, you may register any available candidate and/or change their status from **Registered**, **Completed** or **In Progress** (any status with an attempt record).

- Click **Save Data**

Clipboard Candidates

This function might be useful when an LMS Admin registers Learners to an ILT Session and the list of available learners is numerous.

- **Select** the learners you want to copy to your clipboard.

- Click **Copy to Clipboard** button.

A confirmation dialog asks you to: **Copy currently selected Learners to the Clipboard?**

- Click **Yes**

A message confirms that: **Currently selected Learners successfully copied to the Clipboard.**

- Click **Ok**.

- Check the box next to **Include Clipboard Candidates**. This will display all those learners that were copied to the clipboard along with the **Clipboard** Status.

- Use the **Status dropdown** to change the status to Registered for the desired learners to this ILT Session.
- Click **Save Data**

Send Message to Roster

By using this option you can send messages to Learners registered to a session.

- Select the checkbox next to the Learners you want to send a message to.

Introduction - Raritan Plaza - 12 Sep 2016, 12:00 PM - 01:00 PM

Registered: 10   Registration: -
Max Class: Unlimited   Waitlist: No

Refresh   Bulk Update   Save Data   ☑ Include Available Candidates   ☑ Include Clipboard Candidates

Drag a column header and drop it here to group by that column

Username	First Name	Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail	Status Date
☑ Agray	Ashleigh	Gray	☑	Registered	☐	☐			09/13/2016
☑ Arideout	Alexandra	Rideout	☑	Registered	☐	☐			09/13/2016
☑ Bdavidson	Bryant	Davidson	☑	Registered	☐	☐			09/13/2016
☑ Cdavidson	cheese	Davidson	☑	Registered	☐	☐			09/13/2016
☑ Cjong	candice	de'jong	☑	Registered	☐	☐			09/13/2016
☑ Ddavidson	david	Davidson	☑	Registered	☐	☐			09/13/2016
☐ izmadmin	IZM	Admin	☑	Available	☐	☐			03/05/2013
☐ Jdavidson	John	Davidson	☑	Registered	☐	☐			09/13/2016
☐ Jharris	Joseph	Harris	☑	Clipboard	☐	☐			09/15/2016
☐ Jhartley	Joshua	Hartley	☑	Available	☐	☐			03/05/2013

The **Send Message to Roster** window displays:

Send Message to Roster

Send an Email Message to all selected Learners.

From: *   demo@accordlms.com

Subject: *

Include Instructor: ⓘ   ☐

Body: *

Available Tokens: ⓘ   View

Send   Cancel

Provide the required information along with the information message to your Learners.

- Click **Send**

A Message will inform you that the notices were successfully sent.

- Click **Ok**

Exporting a Session Roster

You can **export** the Session Roster list in PDF, Excel and RAW data .csv file.

All the filtering and grouping customization applied will be reflected in the exported file or printed version.

Learner List

The Learner List is an easy method to determine which Learners or Users have been enrolled to a given Instructor Led Training (ILT) session.

Right Clicking on a given ILT session will bring up it's context menu. Click on **Learner List** to display enrolled Learners or Users. The Learner List will help you to determine, not only who is enrolled, but which method they were enrolled through.

The Learner List shows the enrolled Learners, to include Enrollment Type, Folder Title, Role name and Team. You have the ability to drag a column header to the top row in order to preferably group.

Learner List

Filtering a Learner List

You have the option of filtering a Learner List to find information you are seeking more easily.

As an example of filtering, we will assume we are searching for a specific username which is known to contain 'nelson'.

- Under **Username**; enter the text 'nelson'.
- Hover mouse over filter icon to open dropdown list.
- Click **Contains**

Learner List

The list will refresh, showing only those usernames containing **'nelson'**.

Learner List

Learner List

The **Learner List** is an easy method to determine which Learners or Users have been enrolled to a given Instructor Led Training (ILT) Learning Session.

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Locate the Folder where the **ILT Session** is located which you wish to query and expand it's contents.
- Click on the specific **ILT Session** to open it's context menu.
- From menu click **Learner List**.

The **Learner List** will display any enrolled Learners, to include their Enrollment Type, Folder Title, Role-name and Team.

You have the ability to drag a column header to the top row to preferably group.

The Learner List can be filtered by providing values in any available column.

Filtering means to constrain a given list by limiting results to your selected specific values.

Filtering a Learner List

You have the option of filtering a Learner List to find the information you're seeking more efficiently.

As an example of filtering, we will assume we are searching for a specific username containing the alphabetical characters of **'nelson'**.

- Under **Username**; enter the text; **'nelson'**.
- Hover mouse over filter icon to open dropdown list.
- Click **Contains**

The list will refresh, showing only any usernames which contain **'nelson'**.

ILT Enrollment

Enrollment to ILT (Instructor Led Training), or a specific ILT Session, is accomplished by using the same method as with any other type of Learning Element.

If after reviewing the following steps you still have any questions regarding the Enrollment process, please see help documentation at; [Enrollment](#).

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Actions** tab.
- Select the ILT Learning Element, or the specific ILT Session you wish to enroll selected Learners into.

- Click on **Teams, Roles & Learners** to open panel.
- Choose whether you want this content to be available to particular **Learning Roles** or to **All Team Members**.
- You may also click **Show Search** to open a field which will allow you to search for specific Learners.

- Click **Actions** heading to open panel.
- From the **Select Action** dropdown menu, select **Add Enrollment.**

When this option is selected, the page will refresh, displaying an option to **Auto Register Sessions**.

By checking this box, all users which match your selected enrollment criteria will always become automatically registered for the selected sessions.

- Click **Submit** to enroll the selected Sessions to any Teams, Roles and/or Learners you selected from the above section.

A confirmation dialog box will display saying: **"Are you sure you want to Enroll the selected Folders, LEs and Sessions to the selected Team Members, Learning Roles and/or Learners?"**

- Click **Yes.**

Virtual ILT (VILT)
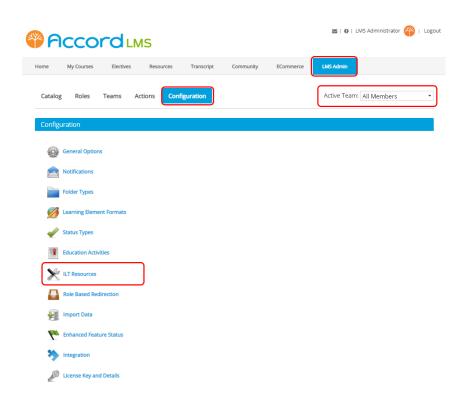
Virtual Instructor Led Training (VILT) Sessions are similar to Instructor Led Training (ILT) Sessions, except that the Locations for VILT Sessions are virtual, hosted via a webinar rather than a physical classroom.

Virtual Location

Virtual Locations are created the same way ILT Locations are created, with the exception that the **Virtual** checkbox needs to be checked.

To establish a VILT location;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- Once the Configuration page opens, click on **ILT Resources**.

In the **ILT Resources** section:

- Click on the **Locations** heading to open this panel.

ILT Resources

Resources can only be edited by the Owner or their Parents

Individual Instructors	›
Role Instructors	›
Locations	›

Return

- Click **Add New Location**.

Locations

Drag a column header and drop it here to group by that column

Display Name	Max Learners	Status	Owner
Behavioral Health Training and Education Network	25	Active	All Members
Classroom A	25	Active	All Members
Conference Room	25	Active	All Members
Corporate Headquarters	50	Active	All Members
GoToWebinar		Active	All Members
Secondary Training Room		Active	All Members

|◄ ◄ 1 ► ►| Page Size: 20 ▼   7 items in 1 pages

Add New Location

- **Name:** (required) Enter a Location name or designation.
- **Status:** Select if this Location will be Active or Inactive. Only Active Locations will be available for use.
- **Location Type:** Select **Virtual - General** from the dropdown menu to create the Virtual Location for the ILT.
- **Other virtual ILT formats;** for reference sake, virtual ILT meetings may also be held through **GoToMeeting**, **GoToWebinar** or **GoToTraining** programs by selecting any of these specific formats from the dropdown menu.
- **Max Learners:** Maximum number of Learners that are allowed in this location. Leave blank for unlimited.
- **Information URL:** Input the URL to the Location website or online map. This information can be very useful for Learners attending the Instructor Led Training.
- **Owner:** From the dropdown menu, select which Team owns this Location, allowing the LMS Admin for this Team to further edit or update this Location.
- **Team Availability:** (required) Select which Teams can use this Location.
- **Description:** Optionally, enter any text information which may help to describe or identify this Location.

- Click **Create** to create and save your new Location.

The newly created Virtual Location will now display in your **Locations** list.

Virtual Instructor Led Training (VILT) Learning Element Sessions

A single Instructor Led Training Learning Element can include either ILT Sessions, VILT Sessions or a combination of both.

To create an Instructor Led Training Learning Element, follow steps described in; [Instructor Led Training](#)

In this example an ILT Learning Element called 'Accord Learner Training Workshop' has already been created.

Now we can add a new VILT.

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the desired ILT Learning Element to open it's context menu.
- Select **LE Sessions** from menu.

In the LE Sessions windows that display:

- Click **Add New Session**.

LE Sessions

Accord Learner Training Workshop

There are no Sessions to list.

Add New Session

Return

When a new Session is created you have the option to select a physical location or a virtual location. A Virtual Instructor Led Training Learning Element are normally held at virtual locations. For this particular example, a **WebEx** location is used to create a new VILT.

New Session

General Settings

Name: * ⓘ   Welcome Webinar

Start Date Time: * ⓘ   03/27/2020   09:00 PM   ☐ All day

End Date Time: * ⓘ   03/27/2020   10:00 PM

☐ Recurrence

Time Zone: ⓘ   (UTC-07:00) Mountain Time (US & Ca ▼

☐ Use Learner's Timezone

Location: ⓘ   <Select Location>   ▼

Instructor: ⓘ

    <Select Location>
    Behavioral Health Training and Education Network [max 25]
    Classroom A [max 25]
    Conference Room [max 25]
    Corporate Headquarters [max 50]
    GoToWebinar
    Secondary Training Room
    Webex

Notifications   >

Advanced Settings   >

Update   Cancel

Once a virtual location is selected from the Location drop down, the UI will refresh and three new input fields (specific to VILT Sessions) will display.

- **Webinar URL** – **(required);** This will be the link to open the VILT Webinar. Paste the URL to a specific Webinar previously created and scheduled through a third party Webinar service; such as WebEx, GoToMeeting, Adobe Connect, etc.
- **Utilization Tracking:** – Select which kind of automatic tracking you would like, if any. ***Please see additional information just below on Utilization Tracking.***
- **"Attended" on Open:** – Check box if you would like to automatically track a Learner as 'attended' by merely opening the event.
- Click **Update** to save changes and create your VILT.

FURTHER INFORMATION REGARDING UTILIZATION TRACKING

One method to encourage active Learner participation with a GoToWebinar session is to set Utilization Tracking to **"Complete" on All poll questions answered**.

Using this option from the dropdown menu will only track and report the Learning Element as 'Complete', if and when a Learner completes any associated GoToWebinar poll questions.

After clicking update the new VILT session will then display under the LE Sessions list; as demonstrated below.
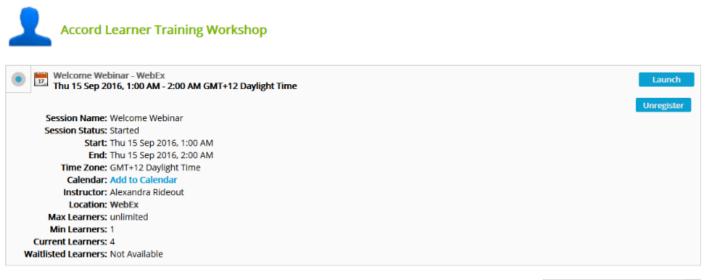
Repeat prior steps as needed to create any number of VILT sessions.

VILT in Learner's My Courses

The Learner's UI for the VILT Session review and registration will be the same as ILT with the exception that once a VILT Session is **Registered**, the UI will update to show a **Launch** button in addition to the **Unregister** button.

The **Add to Calendar** link allows a Learner to download a .ics file that can include a link to the webinar.

The **Launch** button will open the VILT Webinar in a modal or popup window once ready to start.

If the Learner tries to Launch the webinar too early, they will receive a too-early notification. This ensures that a Learner will not accidentally Launch a webinar, which would trigger automatic tracking if so enabled.

VILT Session Roster

In addition to any automatic tracking selected from the VILT Session Details, an Instructor maintains use of a standard Session Roster in order to manage any Learners.

Virtual ILT Configuration

The allowable Webinar Preview period is customizable.

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Navigate to **LMS Admin** tab.
- Click on the **Configuration** tab.
- In the Configuration panel, click on **General Options**.

- Expand **Virtual ILT**.

- **VILT Launch Preview:** Select the number of minutes before a VILT Session begins that a user can launch the Webinar window.
- **Force-Open New Window For Mobile: (checked by default)** This forces the Virtual ILT to launch in a new window whenever accessed while using a mobile device.

- Click **Update** to save changes.

Virtual ILT

VILT Launch Preview: ⓘ [10] min.

Force Open New Window For Mobile: ⓘ ☑

Search

Enrollment Log

Diagnostic Trace

[Update] [Cancel]
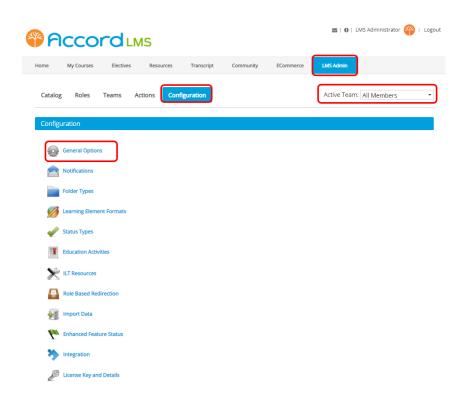
Display or Filter Sessions by Specific Instructors

Ability to Filter which Sessions will Display by Specific Instructor

When choosing this option, any assigned ILT Administrator will see only those Sessions they have been specifically assigned to as the Session Instructor. Team Administrators of the All Members Team will still be able to see all Sessions.

If choosing to Filter by Instructor;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- While in Configuration, click on **General Options**.

Go to General Settings;

- **Filter by Instructor:** When checked, the only sessions which will display in the Catalog will be sessions where the current user is also the current session instructor.

General Settings ⌄

Hide Active Team: ⓘ	☐	
Learner Search List Limit: ⓘ	1000	
Bulk Import Report Storage: ⓘ	30	Days
Include Past Session Display Limit: ⓘ	30	Days
Filter by Instructor: ⓘ	☐	
PDF Font File Name: ⓘ		
SCORM Student Id: ⓘ	○ UserId ● Email	

- When finished, scroll to bottom of page and click **Update**.

Proctoring

Proctoring - Introduction

Need for Proctoring

On occasion it may be considered necessary for a selected LMS learning activity to be proctored.

Proctoring is a process used to verify that a certain online LMS User is actively participating by taking a given learning activity and not an unauthorized substitute.

This verification process is facilitated through a third party by the name of **Integrity Advocate** who verifies and monitors the individual sitting at the computer.

Integrity Advocate verifies this individual by the use of a government issued photo ID which must be provided by the User at the start of a proctored learning activity.

Please see the following article to learn how to setup your Accord LMS for Proctoring.

Configure the Accord LMS for Proctoring

Setup LMS Portal for Proctoring

Before you may setup your LMS Portal for Proctoring you must be supplied credentials for **Integrity Advocate**.

You will require;

- An **Application ID**.
- An **API2 Key**.

If you do not have such information, please contact your dedicated Accord LMS salesperson.

If you do not have a salesperson, contact **Accord LMS Support** by visiting www.accordlms.com.

Should you need to contact **Integrity Advocate** directly, their website may be reached here; Integrity Advocate

Access the Integration Page

If you have the necessary information and want to continue setting up your LMS Portal for Proctoring;

- Ensure the proper **Active Team** is selected by using the associated dropdown menu; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** Tab.
- Click on **Integration**.

The page will then refresh, allowing you to setup various types of integration.

- Click on **Integrity Advocate Proctoring** to open this panel.

Here you will be able to conduct the steps necessary to facilitate proctoring on your Accord LMS.

- Check the box for **Enable Proctoring**.
- Enter the **Application ID** into the designated field.
- Enter the **API2 Key** into the designated field.
- Click on **Test Connection** to verify proper setup.*
- Click on **Update** to save changes and enable proctoring on the LMS.

*Note: Should the test connection fail, check to ensure the proper credentials have been entered correctly and try again. If you still encounter problems, contact Accord LMS Support at www.accordlms.com.

Integrity Advocate Proctoring

Live Proctoring for any of your Learning Elements

Accord LMS provides seamless integration with live proctoring provided by Integrity Advocate.

Proctoring is done remotely via a live feed from the Learner's web camera. When a proctored Learning Element is first Launched, the Learner must enable their web camera and present an ID, if required. The camera will then capture random images during the LE presentation or exam. The captured images are then reviewed by a remote live proctor for final validation of the LE completion and / or score. The validation is then returned to the LMS for tracking and reporting.

Enable Proctoring: ☑

Application ID:

API2 Key:

Test Connection

Update   Return

Your Portal is now ready to have Learning Elements Proctored

Please see the following article to configure Reports to capture and present Proctoring data.
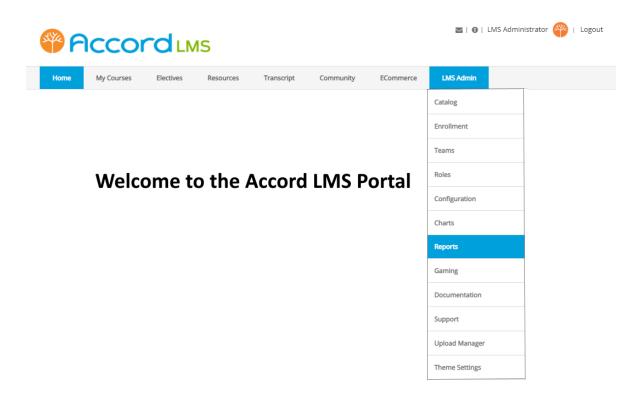
Configure Reports to Present Proctoring Data

To Present Proctoring Data on Reports

Once you have setup your Accord LMS to facilitate proctoring, it will be necessary to add the **Proctoring Status** column to **Reports** so that proctoring data may be documented.

To add the Proctoring Status column to Reports;

- Wave over the **LMS Admin** tab to open its context menu.
- Click on **Reports**.

Under **Learner Activity**, go to **Learner Activity/Transcript with LE Detail** and click on **Continue**.

If necessary, click on **Display Columns** to open this panel.

- Under **Learning Elements**, check the box next to **Proctoring Status**.
- You may also check the box for **Comments** to add a report column to present proctoring comments.
- Should you choose to display a column which reflects the **Proctoring API Response**, check box.

When the Report is generated, the **Comments** and **Proctoring Status** columns will now be displayed.

Reports are Now Configured to Present Proctoring Status and Comments

Please see the following article to learn how to set up a given Learning Element for Proctoring.

Setup Proctoring for a given Learning Element

When a given learning Element Needs to be Proctored

- Ensure the proper **Active Team** is selected by using the associated dropdown menu; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the desired **Learning Element** to open its context menu and select **LE Details**.*

*Note; such a Learning Element used for Proctoring must contain either a Pop-Up or Modal Launch window.

The LE Details field will open.

While in **General Settings;**

- Check box for **Enable Proctoring.**
- Scroll to bottom and click **Update** to save changes.

The chosen Learning Element is now set for Proctoring

Learner Steps Necessary to be Proctored

Proctoring on the Accord LMS

An authorized third-party named Integrity Advocate manages online proctored tests for Accord LMS.

This article describes the few steps necessary for your Learners to take an online proctored activity.

What will the Learner Need?

One Government Issued Photo ID

The only item necessary for a Learner to take a proctored exam is a government issued photo ID.

The Learner Experience

Just below are the easy quick steps a Learner will take in order to sit for a proctored activity.

Learner Login

The Learner will login to the LMS and select the Learning Element to be proctored.

Upon starting this Learning Element, Integrity Advocate will access the Learner's webcam while temporarily obscuring access to the activity.

Learner Submits Photo ID

Integrity Advocate will prompt Learner for a government issued photo ID.

This photo is processed and compared to any previously verified session for this User.

If a facial comparison match is verified, the Learner's new session will be linked with the previously verified session.

The name text on the government photo ID is compared with the name attached to the session. If a facial match is made and the Learner's name also matches, notes are linked with the Learner's session, documenting the verified match.

If everything checks-out properly, the Learner is prompted to the next step.

Learner Activity Begins while Learner is Monitored

Learner Monitoring (if applicable): The Integrity Advocate interface informs the Learner that their session is being monitored and allows them to minimize the Integrity Advocate interface. When minimized, the interface transitions to a 'chat head' style which can be repositioned on the Learner's screen as to not interfere with the host activity.

The Integrity Advocate interface can be re-opened by clicking on the 'chat head'.

Throughout this stage the Learner's face is visually tracked by Integrity Advocate.

If the Learner leaves the view of the camera they will be prompted to return at 5 minutes. If they fail to respond, the Integrity Advocate session will end. Should this occur, the Learner will remain on their activity page but are no longer being monitored.

If and when the Learner completes the activity, the Integrity Advocate session will end.

Overall the Learner proctoring process is uncomplicated.

Actions

Actions - Introduction

Enrollment is handled through the LMS Admin-Actions tab.

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Select the **LMS Admin** tab.
- Click on the **Actions** tab.
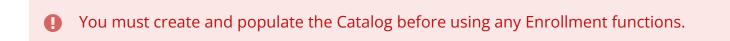
LMS Admin Enrollment allows an LMS Admin to;

- Enroll/drop Learning Roles and or Learners from selected Folders and Learning Elements.
- Enroll/drop Learner Catalog view permissions.
- Perform query operations on selected Folders and or Learning Elements.
- View the various Learning Roles and any Learners enrolled.
- Create, delete and restore Attempt Records.

All this is possible with just a few clicks in the simple but powerful **Actions** panel tool-set.

Note: While working in Enrollment as an LMS Admin, you will only be able to work with any Learning Elements or any Learners assigned to your Active Team. The **Actions** tab may or may not be present depending on the selected Active Team.

⚠ You must create and populate the Catalog before using any Enrollment functions.

ℹ️ Introductory information (not covered in this chapter) for working with the LMS Admin > Catalog tree grid is found in the [Tree Grid](#) chapter in this manual.

Add Enrollment

As an LMS Admin you can **force** enrollment for Learners within your Team. You can filter any Learners who get enrolled using specific Learning Roles.

After such point any enrolled Learning Elements or folders will be auto-populate in the Learner's **My Courses**.

Learning Roles can also be enrolled to specific Learning Elements or any level of hierarchical Learning Catalog Folder.

Single Learners can be enrolled to individual Learning Elements or any level of Learning Catalog Folder.

Benefit of Learning Role Enrollment:

• New Learners can be associated with existing Learning Roles. All Roles and their associated enrollments are automatically assigned to the Learner's **My Courses**.
• No additional enrollment action will be required by the LMS Admin or by the new Learner.
• Learners removed from Learning Roles will lose their associated enrollments.

Benefit of Catalog Folder enrollment:

• New Learning Elements can be associated with preexisting Learning Catalog Folders.
• All folder associated enrollments will update to include any new Learning Elements which will reflect in the Learner's **My Courses**. No additional enrollment action will be required by the LMS Admin or Learner. Conversely,
• Learning Elements removed from a Learning Catalog Folder and their associated enrollments will be automatically removed from the Learner's **My Courses**.

To enroll Learning Roles/Learners in Folders/Learning Elements;

• Ensure the proper **Active Team** is selected; should there be more than one Active Team.
• Select the **Actions** tab.
• Select whatever **folder(s)** and/or **Learning Elements** desired for enrollment.
• Expand the **Team, Roles and Learners** panel.

- **All Team Members:** Check the box to include **All Team Members** or leave it unchecked to select specific **Learning Roles**.

- Alternatively, select the desired **Learning Roles** (those which you have access to) that you want to assign to the selected folders and Learning Elements.

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- Expand the **Actions** section.

- Select **Add Enrollment** from the **Action Panel**.

The page will refresh with a prompt in the Actions panel which reads; **Enroll the selected Folders, LEs and Sessions to the selected Team Members, Learning Roles and/or Learners.**

Once certain you have selected the desired **Folders/Learning Elements** and **Learners/ Learning Roles** to enroll, click **Submit**.

A window displays asking, **Are you sure you want to Enroll the selected Folders, LEs and Sessions to the selected Team Members, Learning Roles and/or Learners?**

• Click **Yes**.
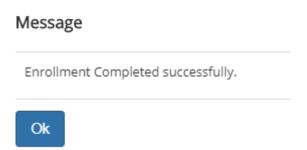
A confirmation message displays: **Enrollment Completed successfully**.

• Click **Ok** to return to Enrollment.

Accord LMS

ℹ **Unless Learning Roles, Learners or All Team Members have been selected, you will be prompted to select them before proceeding.**

ℹ **Unless there are folders or Learning Elements selected, you will be prompted to select them before proceeding.**

Drop Enrollment

Use the **Drop Enrollment** feature to drop Roles or Learners from Catalog Folders or Learning Elements.

To drop Learning Roles or Learners from Folders or Learning Elements:

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- While in the **LMS Admin** tab;
- Select the **Actions** tab.
- Select any desired **Folders** or specific **Learning Elements** desired for **Drop**.
- Expand **Teams, Roles & Learners** panel.

- **All Team Members:** Check the box to include **All Team Members** or leave it unchecked to select specific **Learning Roles**.

- Alternatively, select the desired **Learning Roles** (those which you have access to) that you want to drop from the selected Folders and Learning Elements.

- Expand the **Actions** panel.

- Select **Drop Enrollment** from the **Action Panel**.

The page will refresh with a prompt under the Action Panel which reads, **Drop the selected Folders, LEs and Sessions from the selected Team Members, Learning Roles and/or Learners**.

Once certain you have selected the desired **Folders** or **Learning Elements** and **Learners** or **Learning Roles** desired for drop, click **Submit**.

A confirmation dialog box will display which reads; **Are you sure you want to Drop the selected Folders, LEs and Sessions from the selected Team Members, Learning Roles, and/or Learners?**

- Click **Yes**.

Confirm

Are you sure you want to Drop the selected Folders, LEs
and Sessions from the selected Team Members, Learning
Roles and/or Learners?

Yes   No

A confirmation message will display **Enrollment Dropped successfully.**

- Click **OK** to return to Enrollment.

Message

Enrollment Dropped successfully.

Ok

ⓘ **If there are no Learning Roles, Learners or Team Members selected, you will be prompted to select them before proceeding.**

ⓘ **If there are no folders or Learning Elements selected, you will be prompted to select them before proceeding.**

💡 Before dropping enrollment it is a good practice to use the query tools to understand what the current enrollment status actually is.

Add to Catalog
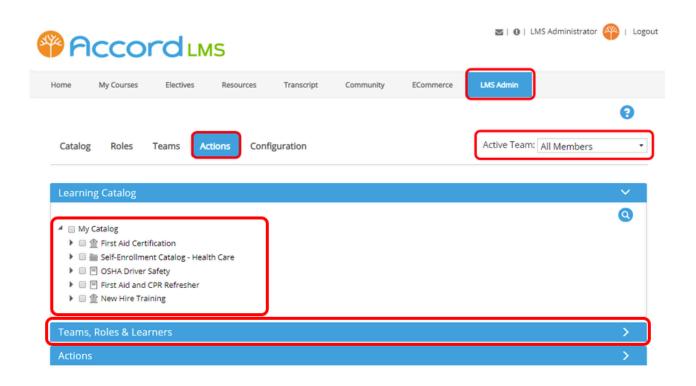
Specify any Learning Catalog Folders (which includes their associated Learning content) that will be visible to Learners on your Team and/or any Learning Roles (which includes the Role associated Learners).

Whenever configuring Learner Catalog View permissions, you may only select entire course folders and/or Learning Roles.

Individual Learning Elements and Learners are excluded through this process.

To assign specific course folder(s) for Catalog View Permissions for selected Role(s):

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Select the **LMS Admin** tab.
- Select the **Actions** tab.
- Select any Folder(s) from the Catalog you wish to be available to selected Learners.
- Expand the **Teams, Roles & Learners** panel.

- Check box for **All Team Members** to include all your Team Members or leave it un-checked to be able to select specific Learning Roles.

- If choosing not to select **All Team Members**, select any desired **Learning Roles** you want to grant view permissions for your selected Folders within the Learner Catalog.

- After making any selections as mentioned above; expand the **Actions** panel.

- Select **Add to Catalog** from the **Action Panel** dropdown menu.

The page refreshes with a prompt under the Action Panel which reads; **Present the selected Folders (and associated LE) to the selected Team Members, Learning Roles and /or Learners in the Learner's Catalog. Learner Catalog View permissions are only supported for Folders and Roles. Individual Learning Elements and Learners will be ignored.**

Once certain you have selected the desired Folders and any applicable Learners/Roles, click **Submit**.

Actions

Present the selected Folders (and associated LE) to the selected Team Members, Learning Roles and/or Learners in the Learner's Catalog. Learner Catalog View permissions are only supported for Folders and Roles. Individual Learning Elements and Learners will be ignored.

Select Action: ⓘ [Add to Catalog ▼]

[Submit]

ⓘ   If there are no Learning Roles, Learners or Team Members selected, you will be prompted to select these before proceeding.

ⓘ   If there are no Folders or Learning Elements selected, you will be prompted to select these before proceeding.

After clicking **Submit**, a confirmation message will display which reads; **Are you sure you want to Present the selected Folders to the selected Team Members, Learning Roles and /or Learners in the Learner's Catalog?**

- Click **Yes**.

Confirm

Are you sure you want to Present the selected Folders to the selected Team Members, Learning Roles and/or Learners in the Learner's Catalog?

[Yes]   No

A confirmation message displays which reads; **Learner Catalog Views were Added successfully**.

- Click **Ok**.

Message

Learner Catalog Views were Added
successfully.

Ok

After performing these actions any selected Catalog Folders (and their associated Learning Elements) will now be visible to all Learners within your Team (if applicable) or to the selected Learning Roles (to include their associated Learners).

Drop from Catalog

This feature lets you remove selected Learning Catalog course folders (and their associated Learning Elements) from selected Roles (to include their associated Learners) from view in the Learner Catalog.

You can only select course folders and Roles, not individual Learning Elements or Learners.

To drop Learning Catalog View Permissions from selected Folders or Role(s):

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Select the **Actions** tab.
- From the Learning Catalog, select any folder(s) desired to be removed from view.
- Expand the **Teams, Roles & Learners** panel.

- Check box for **All Team Members** to include all your Team Members or leave it un-checked to be able to select specific Learning Roles.

- If choosing not to select **All Team Members**, select the desired **Learning Roles** you want to drop view permissions for, from any Folders you selected from within the Learner Catalog.

- Expand the **Actions** panel.

- Select **Drop from Catalog** from the **Action Panel**.

The page refreshes with a prompt under the Action Panel, **Remove the selected Folders (and associated LE) from the selected Team Members, Learning Roles and/or Learners from the Learner's Catalog**.

Once certain you have selected the desired folders and applicable Learners/Roles, click **Submit**.

> ℹ️ If there are no Learning Roles, Learners or Team Members selected, you will be prompted to select them before proceeding.

> ℹ️ If there are no folders or Learning Elements selected, you will be prompted to select them before proceeding.

A window displays asking, **Are you sure you want to Remove the selected Folders from the selected Team Members, Learning Roles and/or Learners in the Learner's Catalog?**

- Click **Yes**.

Confirm

Are you sure you want to Remove the selected Folders from the selected Team Members, Learning Roles and/or Learners in the Learner's Catalog?

[Yes]   No

A confirmation message displays saying: **Learner Catalog Views were Removed successfully**.

- Click **Ok**.

Message

Learner Catalog Views were Removed successfully.

[Ok]

Any selected course folders (and all of their associated Learning Elements) will no longer be visible to the selected Learning Roles (and their associated Learners).

Query Learning Catalog

The Query Tool will allow you to view whatever Learning Roles and or Learners which happen to be assigned to selected Learning Catalog Folders and Learning Elements.

To indicate which Learning Roles and Learners are enrolled in selected Folders or specific Learning Elements;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Select the **Actions** tab.
- Select whatever desired Folder(s) and Learning Element(s) you want to query when searching for their associated **Learning Roles** and **Learners** which are presently enrolled.
- Open the **Actions** panel.

- Select **Query Learning Catalog** from **Action Panel**.

The page will refresh displaying a prompt which reads; **Query the selected Folders, Learning Elements and Sessions and show associated Team Members, Learning Roles and/or Learners.**

Parameter options display. Select radio button next to desired parameters.

- **Type:** Query those Learning Elements that were either enrolled to Learner My Courses or to the Learner Catalog.
- **Team:** Include only the Active Team enrollments, include only a Parent Team enrollments or include All Teams enrollments.
- **Criteria:** Select to **Match ALL** or **Match ANY**.

With a **Match ALL** query; if you select multiple Roles/Learners or All Team Members, only those Folders/Learning Elements that have **ALL** of the selected Roles (All Team Members and Learners) enrolled in them will be displayed.

With a **Match ANY** query; if you select multiple Roles/Learners or All Team Members, all Folders or Learning Elements that have **ANY** of the selected Roles (All Team Members and Learners) enrolled in them will be displayed.

- Once you've made the appropriate parameter selections, click **Submit**.

After the Query has run, any specific Learning Roles or Learners for the selected Folders or Learning Elements (based on your selected parameters) will display (as shown in example below), indicated by a check-mark in the box next to them in the lists under **Learning Roles** and/or under **Learners**.

Query Learning Roles and Members

The Query Tool allows you to identify the various Learning Catalog Folders and or Learning Elements which selected Learning Roles/Learners are enrolled into.

To conduct a given Query;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Click on the **Actions** tab.
- Expand the **Teams, Roles & Learners** panel.

- Select any desired **Learning Roles** and **Learners** you want to search from when desiring to identify any Learning Catalog Folders or Learning Elements they might be enrolled to.

- Expand the **Actions** panel.

- Select **Query Learning Roles and Members** from the **Action Panel**.

The page will refresh with a prompt under the Action Panel which reads; **Query the selected Team Members, Learning Roles and/or Learners and show associated Folders, Learning Elements and Sessions**.

Parameter options display. Select radio button next to desired parameters.

- **Type:** Query those Learning Elements that were either enrolled to Learner My Courses or to the Learner Catalog.
- **Team:** Include only the Active Team enrollments, include only a Parent Team enrollments or include All Teams enrollments.
- **Criteria:** Select to **Match ALL** or **Match ANY**.

With a **Match ALL** query; if you select multiple Roles/Learners or All Team Members, only those Folders/Learning Elements that have **ALL** of the selected Roles (All Team Members and Learners) enrolled in them will be displayed.

With a **Match ANY** query; if you select multiple Roles/Learners or All Team Members, all the Folder/Learning Elements that have **ANY** of the selected Roles (All Team Members and Learners) enrolled in them will be displayed.

After selecting the desired parameters;

- Click **Submit**.

Once the Query has run, any Folders/Learning Elements for **all** of the selected Roles/Learners (based on selected parameters) are displayed with a **check-mark** in the box next to them.

Create LE Attempt Records

The Accord LMS automatically tracks Learner utilization and Learning Element **attempt** activities.

Attempt Records might be created for certification purposes for SCORM and Non-SCORM Learning Elements which involve any activities outside the LMS or for updated record keeping.

The ability to capture Attempt Records is initially setup for selected Learners during **Enrollment**.
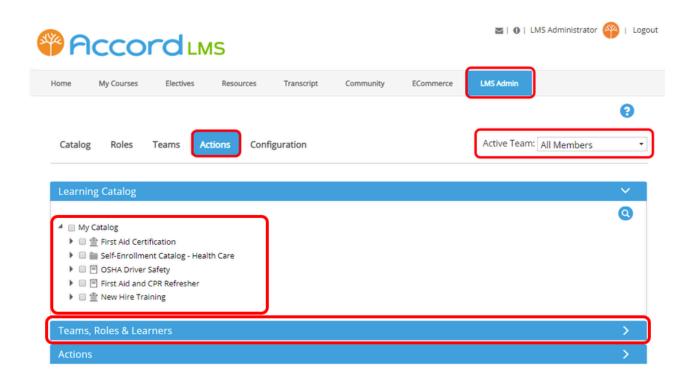
To Create LE Attempt Records;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Select the **Actions** tab.
- Select any desired Folders or Learning Elements you wish to run attempt records for.
- Expand the **Teams, Roles & Learners** panel.

Instructor Led Training Sessions (ILT);

Please Note; attempt records for ILT cannot be created from the Action Panel. Specific ILT attempt records can be created from the Session Roster which is accessed from the Catalog tab.

For **ILT Session Roster** help documentation, please see; http://help.accordlms.com/m/11168/l/256147-session-roster

- **All Team Members:** check the box to include **All** your **Team Members** or leave it un-checked to select specific **Learning Roles**.

- If opting not to select **All Team Members**, select any desired **Learning Roles** or **Learners** for which you wish to create attempt records for.

- Expand the **Actions** panel.

- Select the **Create LE Attempt Records** from the **Action Panel**.

The page will refresh displaying a message under the Action Panel which reads, **Create Attempt Records for the selected LE to the selected Team Members, Learning Roles and/or Learners.**

Additional Parameters are also displayed. Enter the relevant parameters for the learners:

- **Completion:** Select Complete or in Progress as the completion status.
- **Success:** Select None, Passed, Failed or Expired as the success status.
- **Score:** If applicable, enter a number in the field provided.
- **Score Type:** Select either % (percent) or Raw as its value.
- **Duration:** Enter a time using the example format (HH:MM:SS) for hours, minutes, seconds.
- **Slide Position:** Enter completion percentage to be used in presentations.
- **Date:** Enter particular date for the course taken.
- **Time:** Enter particular time for the course taken.
- **Comments:** Enter your comments.
- **Archived:** Create the attempt as Archived.

Once you have selected the Learning Elements to use for the attempt record, the **Create Attempts Records** option from the Action Panel, and have selected the roles or Learners you are creating this attempt record for, click **Submit**.

Actions

Create Attempt Records for the selected LE to the selected Team Members, Learning Roles and/or Learners.

Select Action: ⓘ	Create LE Attempt Records ▼
Completion: ⓘ	● Complete ○ In Progress
Success: ⓘ	None ▼
Score: ⓘ	[ ]
Score Type: ⓘ	● % ○ Raw
Duration: * ⓘ	00:00:00 (HH:MM:SS)
Slide Position: ⓘ	[ ]
Date: * ⓘ	2/21/2020 📅
Time: ⓘ	11 ▼ : 35 ▼
Comments: ⓘ	[ ]
Archived: ⓘ	☐

Submit

ⓘ **Note:** If there are no Learning Roles, Learners or Team Members selected, you will be prompted to select them before proceeding.

Note: If there are no folders or Learning Elements selected, you will be prompted to select them before proceeding.

❗ **Exclude Any ILT Sessions;**

You may not select any Instructor Led Training Sessions (ILT) from the Catalog when attempting to Create LE Attempt Records or you will receive the following warning.

Should you receive such a message, un-select any ILT Sessions and continue.

Once you've made your selections and while ensuring to exclude any ILT Sessions, the following message will display; **Are you sure you want to create the specified Folders and LE Attempt Records for the selected Team Members, Learning Roles and/or Learners?**

- Click **Yes**.

A confirmation window will then display which reads; **(X) Attempt Records were Created successfully**.

- Click **Ok** to close window.

Delete Attempt Records

As an LMS Admin you may maintain the administrative privileges necessary to delete Learner attempt records from the LMS database.

This feature is a special administrative function and may not be permissible for all LMS Administrators.

To Delete Learning Element Attempt Records:

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Select the **Actions** tab.
- Select any Folders or Learning Elements you wish to delete LE attempt records for.
- Expand the **Teams, Roles & Learners** panel.

- To select **All Team Members**, check box to include **All** of your **Team Members.**

- Alternatively, leave box for **All Team Members** unchecked to be able to select any specific **Learning Roles** or **Learners** you desire to delete any attempt records for.
- After making your selections, expand the **Actions** panel.

- Select **Delete LE Attempts Records** from the **Action Panel**.

After selecting **Delete LE Attempt Records** from the menu, the page will refresh displaying a message which reads; **Delete Attempt Records for the selected Folders and Learning Elements from the selected Team Members, Learning Roles and/or Learners. Folder Attempt Records can take a few minutes to Update.**

Use the various button options to select your desired parameters for any LE attempt record deletions.

- **Created By:** Select whether attempt records were created by an LMS Admin, by Learners or by Either.
- **Status:** Choose the Learning Element status, Enrolled, Unenrolled or Either.
- **Start Filter:** Select **None** for no start date; otherwise select a start date.
- **End Filter:** Select **None** for no end date; otherwise select an end date.
- **Current Time:** This information will be stored in the database which reflects the deletion date and time.
- **Comments:** Enter any optional information or comments.
- After selecting your desired parameters for Attempt record deletions, click **Submit.**

Select Action: ⓘ [Delete LE Attempt Records ▼]

Created By: ⓘ ○ LMS Admin ○ Learner ● Either
Status: ⓘ ○ Enrolled ○ Unenrolled ● Either
Start Filter: ⓘ ● None ○ Specified

[2/24/2020] 📅

[00 ▼] : [00 ▼]

End Filter: ⓘ ● None ○ Specified

[2/24/2020] 📅

[23 ▼] : [59 ▼]

Current Time: ⓘ 24 Feb 2020 12:06:43

Comments: ⓘ [   ]

[Submit]

ⓘ **If there are no Learning Roles, Learners or Team Members selected, you will be prompted to select before proceeding.**

ⓘ **If there are no folders or Learning Elements selected, you will be prompted to select before proceeding.**

After clicking **Submit** a message will display which reads; **Are you sure you want to Delete Attempt Records for the selected Folders and Learning Elements from the selected Team Members, Learning Roles and/or Learners? This will also delete all associated Scores and Educational Activities.**

• Click **Yes**.

Confirm

Are you sure you want to Delete Attempt Records for the selected Folders and Learning Elements from the selected Team Members, Learning Roles and/or Learners? This will also delete all associated Scores and Educational Activities.

[Yes]   No

After clicking **Yes** and the records have been deleted from the system, a message will display which reads; **(X) Attempt Records have been Deleted**.

- Click **Ok** to close message.

Message

465 Attempt Records have been Deleted.

[Ok]

Restore Attempt Records

As an LMS Admin you may maintain the administrative privileges necessary to restore any Learner attempt records which were formerly deleted from the LMS.

This feature is a special administrative function and may not be permissible for all LMS Administrators.

To Restore Attempt Records;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Select the **Actions** tab.
- Select the desired Folders and Learning Elements you desire to restore attempt records for.
- Expand the **Teams, Roles & Learners** panel.

- **All Team Members:** check box to include **All** your **Team Members.**

- Alternatively, leave box for **All Team Members** unchecked to select specific **Learning Roles** or **Learners** which you desire to restore any LE attempt records for.

- Expand the **Actions** panel.

- Select **Restore LE Attempt Records** from the **Action Panel**.

After selecting **Restore LE Attempt Records** from the **Action Panel** the page will refresh displaying a message which reads; **Restore Attempt Records, that have been Logically deleted, for the selected Folders and Learning Elements to the selected Team Members, Learning Roles and/or Learners. Folder Attempt Records can take a few minutes to Update**.

Actions ⌄

Restore Attempt Records, that have been Logically deleted, for the selected Folders and Learning Elements to the selected Team Members, Learning Roles and/or Learners. Folder Attempt Records can take a few minutes to Update.

Select Action: ⓘ   Restore LE Attempt Records ▼

Start Filter: ⓘ   ○ None   ⦿ Specified

2/24/2020   🗓

00 ▼ : 00 ▼

End Filter: ⓘ   ○ None   ⦿ Specified

2/24/2020   🗓

23 ▼ : 59 ▼

Current Time: ⓘ   24 Feb 2020 15:41:31

Comments: ⓘ

Submit

❗ Only Logically (soft) deleted Attempts will be recovered.

Physically (hard) deleted Attempts cannot be recovered using this feature.

Use the various button options to select your desired parameters to restore LE attempt records.

- **Start Filter:** Select **None** for no start date; otherwise select a start date.
- **End Filter:** Select **None** for no end date; otherwise select an end date.
- **Current Time:** This information will be stored in the database which reflects the restore date and time.
- **Comments:** Enter any optional information or comments.
- After selecting your desired parameters for **Restore LE Attempt Records**, click **Submit.**

After pressing **Submit** a message will display which reads; **Are you sure you want to Restore Attempt Records for the selected Folders and Learning Elements to the selected Team Members, Learning Roles and/or Learners?'**

- Click **Yes**.

ℹ **If there are no Learning Roles, Learners or Team Members selected, you will be prompted to select them before proceeding.**

ℹ **If there are no folders or Learning Elements selected, you will be prompted to select them before proceeding.**

After pressing **Yes** a confirmation message will display which reads; **(X) Attempt Records have been Restored**.

- Click **Ok** to close message.

Message

3 Attempt Records have been Restored.

Ok

Recalculate Folder Attempt Records

There is a potential for the registered progress of given Learners within a specific Learning Catalog Folder to not properly update on occasion. This condition may sometimes occur after the completion of certain quizzes or presentations.

Whenever this situation may present, an LMS Administrator can recalculate the Folders Attempt Records to force the progress bar to accurately display the level of progress or completion.

On the top left in the image below is a bar graph which represents a given Learner's training progress as being 0% when it should truly reflect a higher percentage.

The following example will take you through the necessary steps to properly recalculate and update training progress.

This process is called **Recalculate Folder Attempts**.

To Recalculate Folder Attempts;

- Ensure the proper **Active Team** is selected; should more than one Active Team exist.
- Go to the **LMS Admin** tab.
- Select the **Actions** tab.
- Select any Folders desired for progress recalculation.
- Expand the **Teams, Roles & Learners** panel.

- **All Team Members:** check box to include All your Team Members or leave it unchecked to select specific **Learning Roles** and or **Learners**.

- If opting to leave the box for **All Team Members** unchecked, select any **Learning Roles** and or **Learners** desired to recalculate attempt records for.

- After making selections from above, open the **Actions** panel.

- Select **Recalculate Folder Attempt Records** from the Action Panel menu.

After selecting **Recalculate Folder Attempt Records** from the Action panel menu, the page will refresh displaying a confirmation message which reads; **Are you sure you want to**

Recalculate Folder Attempt for the selected Folders to the selected Team Members, Learning Roles and/or Learners?

- Click **Yes**.

After clicking **Yes** the page will refresh and display a message which reads; **Recalculate the Completion Status and Score of the selected Folders. This process may take a few minutes to finalize updates**.

- Click **Submit.**

After clicking **Submit** the system conducts the update. After updating a message will display which reads; **(X) Folder Attempt Records were Updated successfully.**

- Click **Ok** to close message.

After completing this process when using the **Recalculate Folder Attempts** feature, the **LMS Learner Training** bar graph will now reflect the proper percentage of progress or completion (as illustrated below).

Export Enrollment to CSV File

If an LMS Administrator desires to determine the various types of learning enrollments for various Learners, they have the option of using the **Export Enrollment to CSV** feature.

This feature will generate a report to gather desired data associated with the various Learning Catalog Folders or Learning Elements such as Names and Roles.

To run an Enrollment Report which is exported to a .csv file;

- Ensure the proper **Active Team** is selected; should more than one Active Team exist.
- Go to the **LMS Admin** tab.
- Select the **Actions** tab.
- From the Learning Catalog select any Folders and or Learning Elements you wish to include in your report.
- Expand the **Teams, Roles & Learners** panel.

- From the list select any **Learning Roles** or **Learners** whose enrollments you want to verify.

- Expand the **Actions** panel.

- From the **Actions** menu select **Export Enrollment to CSV**.

After selecting **Export Enrollment to CSV** from the menu, the page will refresh displaying a message prompt which reads; **Export all Active Team Enrollment to CSV.**

Select the following parameters for your .csv report;

- **Enrollment**: Select the type of enrollment from the available options. These options include any enrollments made automatically via **Roles** or any enrollments made from individual **Learners**. Select the **All** button to include both.
- **Type**: Query Learning Elements that were enrolled either thru the **Learner My Courses** process or enrolled thru the **Learner Catalog**.
- **Team**: Include any enrollments made thru the **Active Team** or any enrollments made thru a **Parent Team**. Select the **All** button to include both.
- After making the report parameter selections click **Submit** to generate your report.

After clicking **Submit** a .csv report will generate which may look similar to the report shown below.
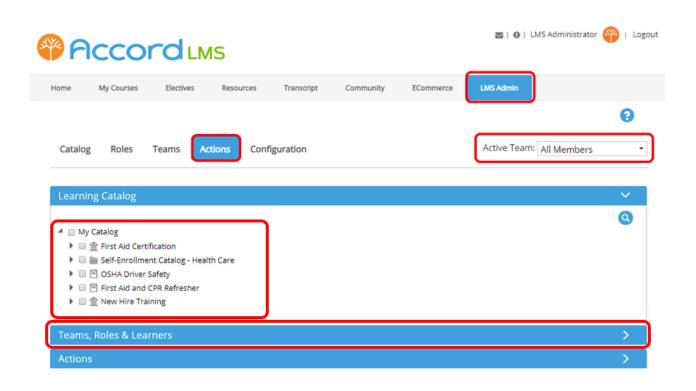
	A	B	C	D	E	F	G	H	I	J	K
1	Folder,LE,Session,Role,User,Team,										
2	LMS Learner Training,,,Acc_Downloads,,All Members,										
3	LMS Learner Training,,,Acc_Training,,All Members,										
4	LMS Learner Training,,,Community Learners,,All Members,										
5	LMS Learner Training,,,LMS Admin Training,,All Members,										
6	LMS Learner Training,,,LMS Learner Training,,All Members,										
7	LMS Admin Training,,,LMS Admin Training,,All Members,										
8											
9											
10											
11											
12											
13											
14											
15											
16											
17											
18											

Search for Enrolled Learners

You can use the **Search Tool** to locate specific Learners within your Team or within specific Learning Roles.

To Search for selected Learners;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to the **LMS Admin** tab.
- Select the **Actions** tab.
- Expand the **Teams, Roles & Learners** panel.

- To search for any user within your Team, check box for **All Team Members**.
- Alternatively you may search for Learners within specific Learning Roles. To use this method leave box for **All Team Members** unchecked and select the individual Learning Roles by clicking on their associated box.
- Search for any sub-Roles by clicking the arrow next to the larger parent Role to expand.
- Expand the **Learners** section by clicking the **Show Search** link.

- After selecting your search criteria click **Search for Learners**.

After clicking on **Search for Learners**, by using your selected search parameters a list of Learners will display in the **Learner List** box.

Learners: ⓘ   Hide Search

Search String: ⓘ   [   ]

Search Field: ⓘ   [User Name   ▼]

Sort Order: ⓘ   [User Name   ▼]

Search for Learners

☐ Select / Unselect   Learner List (76)

☐ Arideout [Alexandra Rideout]
☐ ArtieA [Art Stevens]
☐ Bdavidson [Bryant Davidson]
☐ beckym [Rebeca Thatcher]
☐ Bev Director [Bev Director]
☐ bill [William Fleming]
☐ BJones [Bob Jones]
☐ BobB [Robert Branson]

💡 If you don't know the **exact** spelling of the user you are searching for, just include part of the name.

💡 You can also use the Search feature to locate and process deleted Learners by selecting the radio button next to **Deleted** when using the Search option. Please note that this feature is only available while logged-in using a **Host Account**.

Roles

Learning Roles - Introduction

The use of Learning Roles is an efficient and logical method of getting the right types of training to the right types of Learners.

The Learning Role Management section has its own dedicated node for easy access. By using this feature you can create and manage any **Learning Roles** assigned to any Learners under your supervision.

Utilizing Learning Roles is an efficient way to link specific types of learning content to specific groups of Learners.

Simply put, various types of Learning Content, referred to as Learning Elements, are assigned to and associated with various types of Learning Roles. Learners are then subsequently assigned to specific Learning Roles which then grants them access to the Learning Elements associated with their Learning Roles.

As a common use example, new hire employees can be assigned to a **New Hires Training Role.** Being assigned to this Role will grant them access to the specific Learning Elements (LE) associated with this Role.

What happens when training courses may change or update?

When specific Learning Elements which are associated with a given Learning Role are periodically added, updated or removed, this will simultaneously update the Learning Elements which any Role affected Learners have access to.

Through the usage of Learning Roles, any Role associated Learners will always be kept in sync with the latest updated training.

Creating and Managing Learning Roles

Learning Roles are utilized to efficiently segment and distribute specific types of Learning Content to specific types of Learners; whether these Learners be groups of Learners or individual Learners.

By using the Accord LMS **Roles** feature you can create and manage specific Learning Roles.

Learners are then assigned to these Roles which then grants them access to the specific Learning Content associated with these Roles.

To Create or Manage Learning Roles;

- Ensure the proper **Active Team** is selected.
- Click on the **LMS Admin** tab > **Roles** tab.

Please note; any Roles maintaining any specific Rules for Membership will display a green check under the Rules column.

Definition and Usage of Role Groups

A Role Group is a larger group utilized to segment any subordinate Learning Roles.

For example, should you have a number of Learning Roles such as a Trigonometry Role, a Calculus Role and a Geometry Role, these specific types of Learning Roles might be further contained within a **Mathematics Role Group**.

Any individual Learning Role must always be contained within a larger Role Group.

At a very minimum, any newly supplied Accord LMS will always come supplied with a default Role Group called **'Global Roles'** which any Learning Role may be segmented under immediately without requiring the creation of another Role Group.

The **'Global Roles'** Role Group will always display any and all Learning Roles associated with any and all other Role Groups.

Should you choose to create a new Role Group;

- Click **Add New Group**.

When page refreshes:

- Enter a **Group Name** for the Role Group.
- Enter an optional **Description**.
- Click **Update** to create the new Role Group.

Information Icons: *Hovering mouse over information icons will display helpful tips.*

Update   Cancel

Modify an Existing Role Group

- Ensure the proper **Active Team** has been selected.
- Select the desired Group from the **Filter by Role Group** dropdown list.

Any Role Groups which display on this dropdown list will always be determined by the selected **Active Team**.

After selecting a listed **Role Group** from the menu, the page will refresh which displays it's available subordinate Learning Roles.

- Click the **Edit** (pencil icon) next to the **Filter by Role Group** dropdown menu in order to edit a specific Role Group.

- When page refreshes, make any modifications.
- Click **Update** at bottom to save changes.

Add a New Learning Role

This feature allows you to create **Add a New Role** under their larger associated **Role Group**.

- Ensure the proper **Active Team** is selected.
- Click **Add New Role**.

As shown below, when the page refreshes you will see the various options for entering the informational details for your New Role.

Learning Role Informational Details

GENERAL SETTINGS TAB

Information Icons: Hovering mouse over information icons will display helpful tips.

- **Role Name:** Type in a name for the Role.
- **Description:** (Optional) Enter a summary description for the Role.
- **Role Group Name:** Using the associated dropdown list, select a parent Role Group for the new learning Role. Groups displaying on this dropdown list are determined by the selected **Active Team**.
- **Include Social Group:** Include Social Groups if you want to provide Role members with their own Social Group. When checking box for **Include Social Group**, it places the Role into a Mixed Mode. Leaving the box unchecked places the Role under Security Mode.
- **LE Tracking Options:** Using the associated dropdown list, select what Report Filters should have any **Attempts** recorded by default.

Track All Attempts: Will track all attempts.

Track All Attempts until Completed: Will track all attempts until any assigned Learning Elements (LE) are completed.

- **Delete:** Clicking delete with delete this Role.
- **Members:** Click Refresh to reset any associated members with any updated Role details.
- **Expire:** Click to immediately expire this Role.
  Role may be reactivated by resetting any desired dates and clicking Update. (See **Dates** below.)

Click Update to save any changes.

DATES TAB

Information Icons: *Hovering mouse over information icons will display helpful tips.*

Before Start Date Options: Select whether or not a given Learning Element will be allowed to launch before a designated Start Date or if tracking options will apply between an Activation Date and a Start Date.

Use the associated dropdown menu to select from;

- **LE are not allowed to launch**
- **LE are allowed to launch but without Tracking**
- **LE are allowed to launch with Tracking**

(LE are Learning Elements)

After Due Date Options: Select whether or not a given Learning Element will be allowed to launch after a designated Due Date or if tracking options will apply.

Using the associated dropdown menu to select from;

- **LE are not allowed to launch**.
- **LE are allowed to launch but without Tracking**.
- **LE are allowed to launch with Tracking**.
- **Show Role Activation and Expiration:** Checking box will expand panel further to display additional field options to enter an Activation Date or an Expiration Date.
- **Start Date:** Enter a Start Date.
- **Start Time:** Click clock icon to enter a specific start time.

- **Due Date:** Enter a Due Date.
- **Due Date Time:** Click clock icon to enter a specific due time.

All Members

Refresh: Click Refresh to reset any associated members' dates.

Expire: Click to immediately expire this Role.

Role may be reactivated by resetting any desired dates and clicking Update.

Click Update to save any changes.

Delete: Clicking delete with delete this Role.

RENEWAL TAB

Information Icons: Hovering mouse over information icons will display helpful tips.

Renew From: Use the associated dropdown menu to select from;

- **Non Renewal:** Role will not renew.
- **Activation Date:** Role will renew upon Activation Date.
- **Start Date:** Role will renew upon Start Date.
- **Due Date:** Role will renew upon Due Date.
- **Expiration Date:** Role will renew upon Expiration Date.
- **Delete:** Clicking delete with delete this Role.

Members

Refresh: Click Refresh to reset your parameters for renewal.

Expire: Click to immediately expire this Role.

Role may be reactivated by resetting dates and clicking Update.

Click Update to save any changes.

Delete: Clicking delete with delete this Role.

Establish any Learning Roles' Rules for Membership

Membership Rules

Purpose of Rules for Membership of Learning Roles;

Rules for Membership of Learning Roles are established for the purposes of effectively automating the process of granting membership into specific Learning Roles for specific types of Learners; most typically based upon the informational details of their Learner profiles'.

Establishing Rules for Membership allows for Learners to be automatically funneled into the proper Roles. This will grant them access to the appropriate Learning Content.

To Create or Manage Rules for Membership for Learning Roles;

- Ensure the proper larger **Active Team** has been selected by using the associated dropdown menu; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Roles** tab.
- Click on the **edit (pencil icon)** for the Learning Role you wish to add or edit Membership Rules for .

Click on the Membership Rules header to open section if necessary.

Information Icons: *Hovering a mouse over any information icons will display helpful tips.*

Learner Role Assignment allows a Learner to be automatically included within a given learning Role whenever a new Learner or User is added, providing they satisfy the established Rules.

Owner: The selected **Active Team** will be the owner of this Rule.

- **Automatic Drop:** Select **Yes** if you want Learners dropped from this Role once a given Rule no longer applies to them. Select **No** if you want Learners to remain in this Role regardless of any Rules.
- **Matching Learners:** This numerical value represents the number of Learners which currently match any given Rule's established parameters for membership. This numerical value will potentially update with subsequent Rule changes. You can immediately refresh this value by clicking on the refresh arrow.
- **Rule:** Using the associated dropdown menu, select any desired parameters necessary to be satisfied in order to qualify for automatic Role Membership.

There are 2 different types of Rules:

Single Rule: Only this single Rule will need to be satisfied in order for a Learner to be automatically included in this given Role.

And Rules: All Rules need to be satisfied before a Learner will be automatically included within this learning Role. Unless all Rules are satisfied, the Learning Role Membership Rule is not triggered and the learner will not be included in this Role.

- To create a new **Add** rule, click **Add New Parameter** button.
- After establishing any desired rules for membership, click **Update**.

In the example below, a Rule was created which applies to any Users that were hired by 11 March 2020 **and** authorized at such time.

Membership Rules

Owner: ℹ All Members

Automatic Drop: ℹ ○ Yes ● No

Matching Learners: ℹ 0 ↻

Rule ✖

| Hire Date ▼ | Greater Than Or Equal To ▼ | 11 Mar 2020 🗓 | ✖ |

And

| Authorized ▼ | Equal To ▼ | ● True ○ False | ✖ |

Add New Parameter

Add New Rule

Update

Roles: Member Management

Member Management

Member Management is a feature used to be able to easily and quickly Bulk Update any given Learning Role's associated Members, to include;

Role Member

Activation Date

Start Date

Due Date

To Access Member Management;

- Ensure the proper larger **Active Team** has been selected by using the associated dropdown menu; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Roles** tab.
- Click on the **edit (pencil icon)** for the Learning Role you wish to access Member Management for.

If necessary, click on the Member Management header to open it's access panel.

Once you have selected any of the desired changes for any affected categories, click **Bulk Update**.

Roles: Enrollment

Enrollment

Enrollment is a feature used to be able to easily enroll selected Learning Content into a given Learning Role.

To establish enrollment of Learning Content into any given Learning Role;

- Ensure the proper **Active Team** is selected by using the associated dropdown menu; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Roles** tab.
- Click the **edit (pencil icon)** next to the Learning Role you wish to set enrollments for.

Once in the details panel;

- Scroll down and click on the **Enrollment** header to open this panel.

Once either selecting the tab for **Learner My Courses** or **Learner Electives**, select any Learning Paths, Learning Folders or Learning Elements (LE) desired to be accessible through this Learning Role.

- Once the desired content has been selected, click **Update**.

Enrollment

Learner My Courses | **Learner Electives**

Select which Learning Content this Role will present in the Learner My Courses.

- ☐ My Catalog
  - ☐ 📁 Sample - Accord LMS Content
    - ☐ 📄 Sample - LMS Learner Training
    - ☐ 📄 Sample - LMS Admin Training
    - ☐ 📁 Sample - LMS Learner Resources
    - ☐ 📁 Sample - SCORM Content
  - ☐ 📁 Accord Plus Courses

Update

Roles: Notifications

Notifications

To set any desired Notifications for a given Learning Role;

- Ensure the proper **Active Team** is selected by using the associated dropdown menu; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Roles** tab.
- Click the **edit (pencil icon)** next to the Learning Role you wish to set Notifications for.

Click on the Notifications heading to open section if necessary.

Information Icons: *Hovering mouse over information icons will display helpful tips.*

Start Date Notifications: Specify when you want **Start Date** notifications to be sent to Learners.

You have the option of sending up to three different notices at specified intervals.

- **Levels (First Notice, Second Notice, Final Notice)** is the order in which notices are sent. You can choose to send up to three different notices.
- **Value:** Enter a number in this field to specify how many days, weeks or months in advance of a given Start Date you want reminder notices to be emailed. If value is zero or blank, no notices are sent.

- **Type:** Using the list, select the interval to be used prior to a Start Date; in days, weeks or months.
- **Notify LMS Admin:** Select this option to send any same notices to the LMS Admin staff.

Due Date Notifications: Specify when you want **Due Date** notifications sent to Learners. You can send up to three different notices at specified intervals.

- **Levels (First Notice, Second Notice, Final Notice)** are the order in which notices are sent. You can send up to three notices.
- **Value:** Enter a number in this field to specify how many days, weeks or months in advance of the Due Date you want notices emailed. If value is zero or blank, no notices are sent.
- **Type:** Select the interval to be used prior to the Due Date from the list, using days, weeks or months.
- **Notify LMS Admin:** Select this option if you want same notices sent to the LMS Admin staff.

Select the checkbox next to **Only Notify if any Enrolled LE are Not Completed** if you **only** want notices sent for any enrolled Learning Elements which maintain the status of **Not Completed**.

Notification Starting Date: Select a start date for any Notifications. The initial default date is always current date.

Events which would normally trigger a notification which occur prior to a selected Start Date do not trigger notifications.

Click **Update** to save changes.

Roles: Bulk Learner Assignment

Bulk Learner Assignment

The purpose of **Bulk Learner Assignment** is to efficiently assign learning content to bulk numbers of Learners through Learning Roles.

To set Bulk Learner Assignment for a given Learning Role;

- Ensure the proper **Active Team** is selected.
- Navigate to the **LMS Admin** tab > **Roles** tab.
- Click on **Bulk Learner Assignment**.

Learner Source

Once the page refreshes, you may select bulk numbers of Learners using either **Roles**, **Teams** or a chosen **.CSV File** by clicking on the appropriate button next to **Learner Source**.

Select Bulk Learner Source through Roles

Click button next to **Roles**.

Information Icons: *Hovering mouse over information icons will display helpful tips.*

Learning Roles: Select from any Learning Roles by checking it's accompanying box.

Learners: Click on **Show Search**. Search for the selected string in a specified field from all Learners associated with any of the above selected Roles.

Learning Roles to Assign: Check box next to any new Learning Roles you wish to assign to any Learners you've selected when using the Search function from above.

Access Codes: Enter an optional access code.

Notify Learners: Checking this box notifies selected Learners of new Role assignments.

Override Learning Role Dates: If you want to override any applicable dates already pre-associated with a given learning Role, clicking this box will open a panel for override dates to be entered.

Scroll to bottom and click **Submit** to update and implement any selections.

Select Bulk Learner Source through Teams

Click button next to **Teams**.

Information Icons: *Hovering mouse over information icons will display helpful tips.*

Search String: Search for any Learners (users) containing the search string field.

Learning Roles to Assign: Check the box next to any Learning Roles you wish to assign to any Learners you've selected from above.

Override Learning Role Dates: If you want to override any applicable dates already pre-associated with a given learning Role, clicking this box will open a panel for override dates to be entered.

Scroll to bottom and click **Submit** to update and implement any selections.

Select Bulk Learner Source through a chosen .CSV File

Click button next to **.CSV File**.

Information Icons: *Hovering mouse over information icons will display helpful tips.*

Choose File: Click to download your pre-selected Learner .CSV File from your computer system.

Learning Roles to Assign: Check the box next to any Learning Roles you wish to assign to the Learners downloaded using your chosen Learner .CSV File from above.

Override Learning Role Dates: If you want to override any applicable dates already pre-associated with a given learning Role, clicking this box will open a panel for override dates to be entered.

Scroll to bottom and click **Submit** to update and implement any selections.

Catalog **Roles** Teams Actions Configuration

Select Learners

Learner Source: ⓘ ○ Roles ○ Teams ◉ CSV File

Select CSV File: ⓘ [Choose File]

Learning Roles

Learning Roles to Assign: ⓘ ▶ ☐ < Global Roles >
        ▶ ☐ Certifications
        ▶ ☐ Customer - Training and Resources
        ▶ ☐ eCommerce Roles

Access Codes: ⓘ [_____]

Notify Learners: ⓘ ☐

Dates ⌄

Override learning role dates ⓘ ☐

[Submit] [Return]

Teams
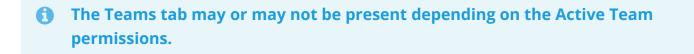
Teams - Introduction

Each LMS Administrator can organize and communicate with their Learners thru the features provided in the **Teams** tab. Here you can specify what notifications you want to receive, send messages to specific groups, manage Learners, bulk upload/import Learners, manage Learning Roles and perform bulk Learning Role assignments.

This chapter highlights the available features under **Teams**. We will review these features in the following sections.

> **ℹ** **The Teams tab may or may not be present depending on the Active Team permissions.**

Add Child Team

As an LMS Admin, you can create **Child Teams**.

Any Child Team can possess the same access and permissions of the Active Team, or any subset thereof.

A Child Team cannot possess any permission's greater than any of it's Parent Teams (any Team which may exist higher within a Team hierarchy).

Permissions may include access to Learning Roles, access to Folders or any LMS Admin privileges.

To add a Child Team;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Locate the Parent Team you want to create a new Child Team under and click to open it's context menu.
- Select **Add Child Team** from the menu.

The **Add Child Team** panel will display.

Waving over any information icons will display helpful tips.

- Type a required name in the **Team Name** field.

- **Include Group:** Check box if you want to provide this Team's members with their own Group. Checking the box will prompt a refresh and a **Group Name** field will appear. Enter a Group Name.
- **Parent Team:** Use the associated dropdown menu to select the Team you desire as the established Parent Team.
- Optionally, in field provided enter a **Description** or any other information you wish to be associated with this Child Team.
- In the **Reference** field, add any optional reference information desired.
- Click **Update** at bottom to save information and create the New Child Team.

Add Multiple Child Teams

By using the **Add Multiple Child Teams** feature, an LMS Admin has the efficient option of adding multiple Child Teams during a single process, saving the effort and time required to create each child team separately.

Any Child Teams can possess the same access and permissions of the Active Team, or any subset team thereof.

Child Teams cannot possess any permission's greater than any of their Parent Teams (Parent Teams are Teams which exist higher within a given Team's hierarchy).

Certain permissions may include access to Learning Roles, access to Learning Element Folders or any LMS Admin privileges.

To Add Multiple Child Teams;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Locate the Parent Team you want to add multiple Child Teams under and click to open it's context menu.
- Select **Add Multiple Child Teams** from menu.

Waving over information icons provides helpful tips.

- **Child Teams to Create:** In this field strictly enter one Child Team Name per line. Each listed name will create a Child Team having this name.
- **Any Child Teams under a common Parent Team must have unique names.** For proper LMS processing and record keeping, it is vital that each Team Name be separate and distinct from all others.
- Adding or editing any conditions or special membership parameters for these newly created Teams is conducted from the Teams page by clicking on the desired team to open it's context menu and selecting **Team Details;** once the Child Team is created.
- After entering any and all New Child Team names, click **Add Team(s)**.

Note; Regardless of whichever order any Child Team Names were entered into the provided field, these new Child Teams will list in alphabetical order under their designated Parent Team.

After Clicking **Add Team(s)**, a message will display which reports how many Child Teams were created.

Should there be any issues with the creation of any Child Team(s) during this process, the error will display on this message.

- Click **Return** to close panel. This will return you to the main Teams tab. New Child Teams will now display under their designated Parent Team in alphabetical order.
- If choosing to add additional conditions or details to any newly created Child Teams, click on the Child Team to open it's context menu and select **Team Details**.

Team Membership Rules

*Waving over any information icons will display helpful tips.

Should you choose to immediately add membership rules in order to automatically add selected Learners to this particular New Child Team while it's being created, click on **Rules** to open this panel.

Here you can opt to establish certain guidelines or parameters in order to qualify and add selected Learners automatically and simultaneously whenever adding a New Child Team.

Owner: This will be the team who owns and controls the Membership Rules. All Rules will apply only to this team unless a subordinate child team is added which will then adopt the Rules of its parent team. Only an authorized LMS Admin from the owner team may edit or delete Rules.

- **Automatic Drop:** Select whether or not a Learner should be automatically dropped from the team should they no longer satisfy team Rules. This will only affect Learners who had been added to the team thru Rules and will not affect or drop any Learners who were added by any other method.
- **Matching Learners:** The number of Learners which currently match Rule parameters. Initially blank, the number of matching Learners will display and update as Rules change.
- **Select Field:** Clicking on this will open a dropdown menu allowing you to select the specific parameters which allow Learners to be added to the team. ***Note;** These criteria are selected from the user profile settings which can be created and defined by LMS Admin.

- **Select Condition:** Use the associated dropdown menu to select the conditions necessary to meet the **Select Field** selected to in order for any Learner to meet conditions necessary for Team membership.
- **Add New Parameter:** This will allow you to add numerous specific criteria for selecting team membership. Members must meet all criteria specified in the rule to be included in the team.
- **Add New Rule:** Should you choose to add a subsequent Rule with membership identifying parameters of its own, click on **Add New Rule**. You may add as many Rules as you need. Members who meet the criteria for at least one rule will be included in the team.

When you have added your preferred criteria for automatically adding Learners to your new child team, click Update.

Remote SCO

Waving over any information icons will display helpful tips.

Remote SCO will enable this Child Team to access and use any digital URL's associated with **Shared Content Object** type Learning Elements via a remote LMS system.
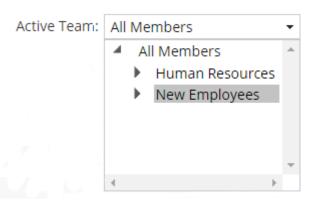
If choosing to enable Remote SCO for this Child Team, click on the Remote SCO heading to open this panel.

- **Enable Remote SCO:** Check box to enable.
- **Remote LMS URL:** Paste the URL of the external LMS where you wish to publish your digital Learning Element content. Please take into account that the Accord Server must be able to conduct HTTP requests for this URL.
- Click **Update** to save and enable Remote SCO for this Child Team.

Remote SCO

Enable Remote SCO: ⓘ ☐

Remote LMS URL: ⓘ [   ]

Update   Return

Active Team List

The Team(s) created will be displayed in the Active Team drop-down list. This list will only display the Teams which you have access to.

Active Team: All Members ▼

◢ All Members
   ▶ Human Resources
   ▶ New Employees

The selected **Active Team** will determine all the Learners, Learning Elements and LMS Admin Features that you have permissions for or access to. Selecting another Active Team triggers new permissions and accessibility specific to that team.

These features will assist those LMS Admin who manage multiple Teams maintain different parameters for each respective team. For example, if you select **New Employees** as the Active Team, you will see only the Roles and Folders for that team.

Moving and Copying Teams

On occasion an LMS Admin may decide to either copy or move an existing Team.

Moving and/or Copying Teams can be accomplished in two different manners which will be demonstrated here.

Please understand that any special LMS Admin permissions for any Team which is moved under a new Parent Team may be affected depending on the established permissions of it's new Parent Team.

In order to Move or Copy a Team;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Clicking on the arrow next to a given Team will allow it to expand, displaying any existing LMS Admin Types for this Team or any existing Child Teams.

Move a Team by the Dragging and Dropping Method

Very similar to any hierarchical storage folder structure, an existing Team may be moved to a new location within the hierarchical structure by clicking on the desired Team, holding down the mouse button and then dragging it and dropping it under a different Team.

Move Team by Context Menu Method

Click on the Team you wish to move to open it's context menu.

- Select **Team Details** from the menu.

The Team Details panel will open.

- Use the dropdown menu next to **Parent Team** to select the new Parent Team.
- After making your selection click **Update**.

Important Note; any Child Teams under a same Parent Team cannot have the same name.

Make Copy of Existing Team

Copying a Team will simultaneously copy any of it's existing subordinate Child Teams.

Should you choose to make a copy of an existing Team;

- Click on the Team you wish to copy to open it's context menu.
- Select **Team Details** from the menu.
- Two different Teams under the same Parent Team cannot maintain the same name. Place a new name for the Team in the Team Name field.
- Select the desired **Parent Team** for your new copied Team.
- Click **Copy**.

After returning to the Teams tab, refresh the page and the new copied Team will now exist under it's assigned Parent Team.

Team Details

Team Details is the feature where you may;

- Change a Team name.
- Create a Team Group.
- Add or edit a Team description.
- Add or edit Rules for team membership.
- Delete a Team.

Accessing Team Details

To Access **Team Details**;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Navigate to the **LMS Admin** tab.
- Select the **Teams** tab.
- Click on the desired Team to open it's context menu.
- Select **Team Details**.

The **Team Details** panel will display. General configuration options include;

- **Team Name**: The current team name will auto-populate in this field. You can change the team name by editing the text.
- **Include Group**: Check this box to provide team members with their own group. Once the box has been checked, this will prompt a refresh and a **Group Name** field will appear.

- **Group Name**: Name the group as you desire.
- **Parent Team**: Initially this dropdown menu will display this Team's current Parent Team. You can edit a Team's **Parent Team** by using the associated dropdown menu and selecting from another which may be listed here.

Please Note: The **All Members** team is the root team that all other teams are created under. The **All Members** team has full permissions and hard coded into the LMS. Full permissions for the All Members Team cannot be edited or deleted.

Child Teams may have **all** or only some of the permissions of it's Parent Team. If a user's account has a Team Role that grants access to a specific Child Team's features, but not the root **All Members Team**, their root team where it obtains it permissions from will be the Child Team it's under.

- **Description**: In the field provided you may enter an optional description to help identify this Team as well as any other useful associated information.
- In the **Reference** field, add any optional reference information desired.
- **Version History**: Shows the version history of the selected Team's edits and updates.
- Click **Update** to save any changes.

> ⊗ **Sibling Teams must always have separate and distinct names from each other whenever situated under the same Parent Team.**

Team Membership Rules

Should you choose to create membership rules in order to add select Learners to this team, click on **Rules** to open the section.

Here you can opt for certain criteria to serve as parameters to add select Learners.

- **Owner:** This will be the team who owns and controls the Membership Rules. All Rules will apply only to this team unless a subordinate child team is added which will then adopt the Rules of its parent team. Only an authorized LMS Admin from the owner team may edit or delete Rules.
- **Automatic Drop:** Select whether or not a Learner should be automatically dropped from the team should they no longer satisfy team membership Rules. This will only affect Learners who had been added to the team thru Rules and will not affect or drop any Learners who were added by any other method.
- **Matching Learners:** The number of Learners which currently match Rule parameters. Initially blank, the number of matching Learners will dynamically update as Rules change.
- **Select Field:** Clicking on this will open a dropdown menu allowing you to select the specific parameters which allow Learners to be added to the team. There are ample specific criteria to select from.
- **Select Condition:** Use the associated dropdown menu to select the conditions necessary to meet the **Select Field** selected to in order for any Learner to meet conditions necessary for Team membership.
- **Add New Parameter:** This will allow you to add numerous specific criteria for selecting team membership.
- **Add New Rule:** Should you choose to add a subsequent Rule with membership identifying parameters of its own, click on **Add New Rule**. You may add as many Rules as you need.

When you have added your preferred criteria for adding Learners to your new child team, click on Update.

Deleting a Team

To Delete a Team;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Click on the Team you wish to delete to open it's context menu.
- Select **Team Details** from menu.

The **Team Details** panel will open.

• Scroll to bottom and click **Delete**.

A window displays asking you to confirm the deletion: **'Are you sure you want to Delete this Team? All Locations and Instructors created on this team will also be deleted. It may leave Sessions with empty Locations and Instructors'**

- If certain, Click **Yes.**

Establish Team Learning Content, Learning Roles and Portal Access

Quickly and efficiently setup access to Learning Content, Learning Roles and selected LMS Portals for segmented Teams of Learners.

The Learning Content, Learning Roles and Portal Access feature allows for LMS Administrators to select which Learning Catalog Folders, Learning Roles or LMS Portals any given Team will have access to.

- While under the **LMS Admin** tab, select the **Teams** tab.
- Click on the Team you wish to update in order to open it's context menu.
- Select **Team Content, Role and Portal Access** from menu.

The TEAM CONTENT, ROLE AND PORTAL ACCESS window opens.
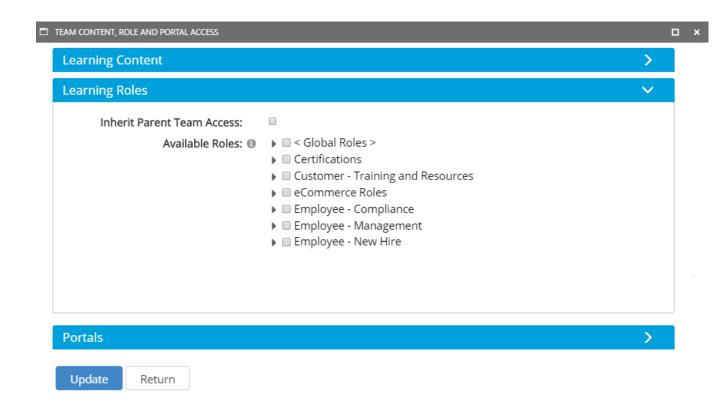
Learning Content

- Leaving **Inherit Parent Team Access** box checked automatically grants this Team access to any Learning Catalog Folders that it's Parent Folder has access to.
- For a Team to have access **only** to specific Learning Catalog Folders, un-check box for **Inherit Parent Team Access** and then check boxes next to the appropriate Folders.

Learning Roles

- **Click Heading** to open panel if necessary.
- Leaving **Inherit Parent Team Access** box checked automatically grants this Team Learning Catalog access through all available Learning Roles.
- For a Team to have access only through **specific Learning Roles**, un-check box for **Inherit Parent Team Access** and then check boxes next to any appropriate Learning Role.

Portals

- **Click Heading** to open panel if necessary.
- Leave **Inherit Parent Team Access** box checked to automatically grant access to all available LMS portals.
- To select from any other available portals, un-check box for **Inherit Parent Team Access** and then check boxes for any other desired LMS portals.

- Click **Update** to save any changes.

Team Access Codes

Access Codes are similar to RSVP codes except that they support a many-to-many relationship with Learning Roles and can also specify a Team Membership.

After their configuration and creation, Access Codes can be submitted to grant Learners (or possibly LMS Administrators) any number of Learning Roles (both local to the portal that hosts the master LMS Administration Module/Catalog and on any other portal in the DNN installation). Access Codes can be used to grant **Team Membership** which comes into play with larger hierarchical training structures. If a user is assigned a Learning Role on a different portal, their user account will be validated for that portal as well.

To add, view or edit a Team's Access Codes:

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Select the **Teams** tab.
- Click on the desired Team to open it's context menu.
- Select **Team Access Codes** from the menu.

The **Team Access Codes** panel displays.

Initially, the Access Codes List will be empty and ready for you to create any needed Access Codes.

Add a New Access Code

- Click **Add New Access Code.**

The **Access Code** details panel will display.

- **Access Code Name:** Input Access Code Name in this field.
- **Access Code:** Enter the new Access code here.
- **Active:** Check the box to activate the access code. Un-check the box to deactivate the access code.
- **Description:** Enter a description to help identify this Access Code.
- **Owner:** This will display the Team to which this Access Code Applies.
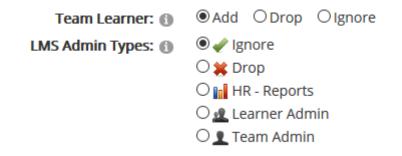
- **Team Learner:** Check Add if you want the user that submits the Access Code to be included as a Learner of this Team. Check Drop to drop the Learner from this team when submitting this Access Code. Use Ignore to bypass Team Membership.

- **LMS Admin Types:** All the Admin Types available to the Team will be listed here. You may choose to grant any of the Admin Type privileges to a user who submits the access code. You may also remove Admin Type privileges from a user who submits the access code by selecting **Drop**. Select **Ignore** if you intend not to grant or remove any LMS Admin Type privileges.

- **Local Learning Roles:** Select which Learning Roles will be assigned with this Access Code. Only Roles associated with the current Team will display.

Role Assignments: These options available in the drop-down menu will be applied to the Local Learning Roles selected.

- **Add if New:** If any of the Roles selected is New to a Learner, it will be added. If the Learner already has this Role, no action is taken.
- **Add or Refresh:** If the Learner does not have the Learning Role, it will be added. If the Learner already has the Learning Role, it will be updated. This feature is typically used in cases of Course Renewal.
- **Expire:** This will force the expiration of the Learning Roles selected. This option will override the expiration dates that any Learning Roles may already possess.
- **Delete:** Use this option to delete the selected Learning Roles from those users who currently possess them.

Role Assignments: ⓘ

Add if New ⌄

| Add if New |
| Add or Refresh |
| Expire |
| Delete |

- **Notify Users:** Check this box to send notifications to users if they were assigned Learning Roles, Team Memberships or any LMS Admin Type privileges.
- **Admin Notification Addresses:** Input the email addresses for the Admins who should be notified whenever an Access Code has been submitted.
- **Version History:** Shows the Version History of Access Codes updates. It will initially be blank until an Access Code has been created.

Notify Users: ⓘ ☑

Admin Notification Addresses: ⓘ `demotest@sample.com`

Version History: ⓘ

Utilization and Expiration

Utilization and Expiration   ⌃

Utilization Limit: ⓘ [   ]

Create Unique: ⓘ ☐

Utilization Threshlold Notifications: ⓘ

Level	Value	Type
Final Notice	[ ]	◉ Total ○ %
Second Notice	[ ]	◉ Total ○ %
First Notice	[ ]	◉ Total ○ %

Start Date: ⓘ [   ] 🖩

End Date: ⓘ [   ] 🖩

Expiration Threshold Notifications: ⓘ

Level	Value	Type
Final Notice	[ ]	Days ⌄
Second Notice	[ ]	Days ⌄
First Notice	[ ]	Days ⌄

[Update] [Return]

- **Utilization Limit:** This will limit how many times a particular Access Code may be used. Once the limit is reached, the Access Code will stop working until the limit has either been increased or reset.
- **Create Unique:** This will create a unique Access Code that may only be used one time.
- **Utilization Threshold Notifications:** This will send notifications when the Utilization Limit has been reached.
- **Start Date:** Set a Start Date for when an Access Code should activate.
- **End Date:** Set an End Date for when an Access Code should deactivate.
- **Expiration Threshold Notifications:** This will send notifications when an Access Code has expired.

Once all your values are set:

- Click **Update** to create the new Access Code.

The new Access Code will then be listed in the **Access Code List.**

Access Code Utilization

When an Access Code is used, a Utilization List is generated that provides LMS Admin the ability to keep track of Access Code usage. This list can be obtained by accessing the edit feature.

- Click the **pencil** icon.

- Click on the **Utilization and Expiration** heading to open this panel.

- In **Tracking and Utilization**, click the **Download Code and Utilization List.** This will generate a comma delimited file that you can download to your PC.

Utilization and Expiration

Utilization Limit: 15

Utilized: 5   Reset

Create Unique: ☐

Tracking and Utilization: **Download Code and Utilization List**

Utilization Threshlold Notifications:

Level	Value	Type	
Final Notice	1	⦿ Total	○ %
Second Notice	3	⦿ Total	○ %
First Notice	5	⦿ Total	○ %

Start Date: 3/20/2017

End Date: 5/30/2017

Expiration Threshold Notifications:

Level	Value	Type
Final Notice	1	Days
Second Notice	3	Days
First Notice	4	Days

Update   **Return**   **Delete**

- Click **Return** to go back to the Team Access Code list.

Utilization and Expiration

Utilization Limit: 15

Utilized: 5   Reset

Create Unique: ☐

Tracking and Utilization: **Download Code and Utilization List**

Utilization Threshlold Notifications:

Level	Value	Type	
Final Notice	1	⦿ Total	○ %
Second Notice	3	⦿ Total	○ %
First Notice	5	⦿ Total	○ %

Start Date: 3/20/2017

End Date: 5/30/2017

Expiration Threshold Notifications:

Level	Value	Type
Final Notice	1	Days
Second Notice	3	Days
First Notice	4	Days

Update   **Return**   **Delete**

Send Team Message

Send selected Learners from a selected Team a custom email message.

> ⓘ The **'From'** address on the delivered email message will be the user account email address (your email address).

To send a Team message;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Select the **LMS Admin** tab.
- Click on the **Teams** tab.
- Click on the desired Team to open it's context menu.
- Select **Send Team Message**.

The **SEND TEAM MESSAGE** panel will display.

- **Learners:** checking this box will send this message to those Learners which are determined by whatever Learning Roles or Role Status you will select just below.
- **Filter by Learning Roles:** Filter who will receive this message by choosing the available Learning Roles. Click arrows as necessary to expand and see all available Learning Roles.
- **Filter by Role Status:** Check appropriate box.
- **LMS Admin:** Select the LMS Admin types you wish to receive this message.
- **Validation Test:** Checking this box will send a copy of this message to yourself (the current logged in user).

- **Subject:** Enter message subject.
- **Body:** Use provided field to enter message.
- **Available Tokens:** Optional; Text/HTML Tokens are available for easy dynamic replacement. To observe list of available message tokens click **View**. Scroll as necessary to see all available tokens.

Once all your message settings are in place;

- Click **Send** to deliver message using your preset parameters.
- A confirmation message will display indicating the number of Learners who received your message; click **OK.**
- To save this message along with it's preset parameters for any future use, click **Update.**
- Click **Return** to exit this panel.

LMS Admin Types

From a generalized perspective, an **LMS Admin** is a type of digital manager utilized to manage a given segment of an organization's ongoing online certifications, competencies and training.

Four default LMS Admin Types come pre-loaded into the LMS; these are **Content Admin**, **Learner Admin**, **Report Admin** and **Team Admin**.

The Feature of **LMS Admin Types** can be used to define various permissions and levels of access for specific LMS Admin Types.

Each User Administrator may only have one LMS Admin Type assigned to them for any given Team.

Should some extra functionality become required, new LMS Admin Types can be easily created.

Please Note; It is normally a best practice to leave the settings for the LMS Admin Types under the **All Members** Team unchanged. It is advised to edit only those LMS Admin Types associated with Child Teams.

To access any existing LMS Admin Types for a specific Team;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Clicking on the arrow next to a given Team will allow it to expand, displaying any existing LMS Admin Types for this Team.

⚠ **A created LMS Admin Type can only be edited or deleted by a member of the Team which created it.**

LMS Admin Management

Each LMS Admin Type has it's own management feature which allows for the assignment or removal of specific Users who are utilized to manage a particular LMS Admin Type.

The system default LMS Admin Types which come delivered with the new Accord LMS are pre-configured to be able to access specific content and features.

Adding a new User to any of the default LMS Admin Types grants these Users the identical preset permissions.

To access the LMS Admin Management Feature;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Select the desired Team and click on the specific **LMS Admin Type** you wish to edit.
- Select **LMS Admin Management** from menu.

The **LMS ADMIN MANAGEMENT** panel will display.

Initially it will contain zero Users.

Click **Add New User**.

In the **MEMBER DETAILS** panel, any fields with red asterisk are required.

Hovering a mouse over information icons will provide helpful information.

Only information within the top **Add New User** field is necessary to add a User.

Any information within the **Edit Profile** fields which follow are optional.

- **Authorize:** Activate the User's permissions.
- **Notify:** By checking this box, when adding a new User an email notification will be sent to the specific email address entered above.
- **Random Password:** If this box is checked, a Random Password will be generated for this User. Optionally, you may create a custom password for this User in fields below.
- **Password:** Create a password for the User which they will use to login to the LMS. This password is **case sensitive**.
- **Confirm Password:** Re-enter the password in this field to confirm it was entered correctly.
- **Available Roles:** Place a check in the box next to any specific Roles you want to initially assign to this User. Any available Roles which are listed here will be determined by the current Active Team.
- **CEU:** These are the available types of **Continuing Education Units** which can be rewarded for any Users which may require various forms of annual certifications and competencies.
- Click **Add New User** near bottom to create the new User account.

After clicking **Add New User** the page will refresh, returning you to the **LMS ADMIN MANAGEMENT** panel where the new User account will list alphabetically.

Directly from this panel, by utilizing the 5 icons situated to the left of the username, you may conveniently;

- **Edit:** Edit a User's profile or permissions.
- **Manage Roles:** Edit a User's Learning Roles.
- **Modify Learner Status:** Modify a User's Learner Status.
- **Modify Admin Type:** Modify a User's LMS Admin Type.
- **User Enrollment:** Edit a User's Enrollment status.
- **Authorized:** Authorize or un-authorize a User from here.
- **Merge Users:** On occasion, a certain User maybe entered into the LMS system more than once. Clicking on **Merge Users** will allow these different profiles for the same User to be merged together under a single profile.

Click on **Return** to go back to the **Teams** tab.

Team Admin Management

Search: [   ] [Username ▼]

[Search]

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All Unauthorized Authorized

	Username	Display Name	Address	Telephone	Created Date	Authorized
📝🛡👥👤📋	mary.jones@gmail.com	Mary Jones			4/10/2020 3:44:22 PM	☑

Page 1 of 1 First Previous Next Last

[Add New User] [Merge Users]

[Return]

LMS Admin Notifications

The **LMS Admin Notifications** feature is where you can set any default notifications desired to be sent to any Users who are established as specific LMS Admin Types for any given Team.

To access LMS Admin Notifications;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Select the desired Team and click on the specific **LMS Admin Type** you wish to set notifications for.
- Select **LMS Admin Notifications** from the context menu.

The **LMS Admin Notifications** window displays:

- **LE Enrollment:** Check box to send notifications of Learning Element Enrollments.
- **Session Registration:** Send a notification whenever a Learner has registered to a Session, either by self or through an LMS Admin.
- **LE Attempts:** Select the specific type of Learning Element attempt notifications to be sent. The options vary from **All:** for all attempts, **Complete:** for completions only, **Pass:** only when LE is passed. Select **None** to deactivate any of these types of notifications from being sent.
- **Conditions Satisfied:** Select this option to send a notification only once **all** conditions have been satisfied for all Learning Elements or only for a specific Learning Element.
- **Learner Comments:** Check box to send a notification if a Learner leaves a comment for any Learning Element or only for selected Learning Elements.
- Click **Update** to save.

Team Admin Notifications

LE Enrollment: ⓘ ☐

Session Registration: ⓘ ☐

LE Attempts: ⓘ None ▾

Conditions Satisfied: ⓘ ☐

Learner Comments: ⓘ ☐

Update   Return

Bulk LMS Admin Assignment

The **Bulk LMS Admin Assignment** feature is a tool which can be used to add or drop specific LMS Admin permissions for a group of Users assigned to a given Team.

To access Bulk LMS Admin Assignment;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Click on the **LMS Admin Type** you want to manage to open it's context menu.
- Select **Bulk LMS Admin Assignment** from it's menu.

The **Bulk LMS Admin Assignment** window displays.

- In the **Users List** section, you have two options to import the 'Users List'. These will be the users you wish to add or drop LMS Admin permissions.
- **CSV File:** A text file delimited by commas.The first row of the file must have the column names. These can be present in any order, in any case and must contain the User Names. If using this option, click Choose File to locate and select the file.
- **User Names:** Rather than using a CSV File you have the option of entering the User Names in the field provided separated by commas.
- **Add** or **Drop** LMS Admin permissions.
- **Notify Users:** Check the box to notify users of their new LMS Admin assignments whether it be **Add** or **Drop**.

Bulk Team Admin Assignment ⌃

Users List: ⓘ ◉ CSV File: [Choose File]
  ○ User Names: [_____ •••]
Assignment: ⓘ ◉ Add ○ Drop
Notify Users: ⓘ ☐

[Assign] [Return]

- Click/Tap the **Assign** button to add or drop the LMS Admin permissions.

Bulk Team Admin Assignment ⌃

Users List: ⓘ ◉ CSV File: [BulkAdminAssignment.csv]
  ○ User Names: [_____ •••]
Assignment: ⓘ ◉ Add ○ Drop
Notify Users: ⓘ ☑

[Assign] [Return]

When prompted; **Are you sure you want to Assign Membership to the selected Users?**

- Click/Tap **Yes**.

Confirm

Are you sure you want to Assign Membership to the selected Users?

Yes   No

Once the operation is complete, you will see an **Assign Users Membership Status** message where you can review the details of the Bulk LMS Admin Assignment just performed.

Assign Users Membership Status
Total Records in List: 1
Total New Membership Assigned: 1
Total Duplicate Membership Assignments Ignored: 0
Total Records in Error: 0

📄 BulkAdminAssignment.csv

Bulk LMS Admin Import

Bulk LMS Admin Import is a feature used to upload User lists as well as be able to specify which LMS Admin Type content your various LMS Admins may access.

Access Code assignment is optional and can be included in the uploaded .csv file.

To access Bulk LMS Admin Import;

- Ensure the proper **Active Team** is selected by using the associated dropdown menu; should there be more than one **Active Team**.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Click on the specific **LMS Admin Type** you want to manage to open it's context menu.
- Select **Bulk LMS Admin Import** from it's menu.

The **Bulk LMS Admin Import** window displays.

- **LMS Admin List:** You will need to have a text file delimited by commas. The first row of the file must have the column names. These can be present in any order, in any case and must contain: User name; First Name; Last Name; Display Name; Email Address; Password (optional); and Access Code (optional). Each row for each User Name can include a Password (if absent a random Password will be generated) and Access Codes (a semicolon separated list of Access Codes). In addition, Access Codes from the web form will be added to each User. Click **Browse** to locate and select your comma delimited LMS Admin list file.
- **Access Codes:** Provide a comma separated list of Access Codes to assign.
- **Notify Users:** Select this option to notify users via email.

- **Notify Portal Administrator:** Selecting this option will send a notification email to the Portal Administrator containing the new LMS Admin.
- **Notify BCC:** Send a notification email for each LMS Admin to a comma separated list of email addresses.
- **Random Password:** Select this option if you want random passwords to be generated. If your LMS Admin list file does NOT contain passwords, Random Passwords will be generated whether or not this option is selected.
- **Require New Password:** If this option is checked, users must create a new password after logging in.

> 💡 **A sample .csv file can be found at the end of this article.**

When prompted, "**Are you sure you want to Import the selected LMS Admin list?**"

- Click/Tap **Yes**.

Once the operation is complete, you will see an **Upload LMS Admin Status** message where you may review the details of the **Bulk LMS Admin Import** just performed.

Upload LMS Admin Status
Total Records in List: **1**
Total New Accounts Created: **1**
Total Duplicate Account Ignored: **0**
Total Access Codes: **0**
Total wrong Access Codes: **0**
Total Records in Error: **0**

BulkLMSAdminImport.csv

Learners

Learners - Introduction

Each LMS Team possesses a specific **LMS Admin Type** called **Learners**.

This LMS Admin Type includes any and all Users which were entered into the system as Learners.

A variety of management options exists for the **Learners-LMS Admin Type** and can be easily accessed through it's context menu.

More comprehensive information concerning the **Learners-LMS Admin Type** is covered within the LMS help documentation which follows.

To access the management features for the Learners-LMS Admin Type from any Team;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Expand a desired Team and click on it's **Learners-LMS Admin Type** to open it's context menu.

The various management features are listed on the context menu; as shown below.

Learner Management

Create and manage Learner-User accounts under your supervision.

To Access Learner Management:

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Expand the desired Team and click on **Learners** to open it's context menu.
- Select **Learner Management** from menu.

The Learner Management panel will display.

All current Learners for this Team will be listed alphabetically here.

There are various Learner management options you can perform from this panel, to include;

Create a New User Account

- Click **Add New User**.

The **MEMBERS DETAILS** panel will display.

In the **MEMBER DETAILS** panel, any fields with red asterisk are required.

Hovering a mouse over information icons will provide helpful information.

Only information within the top **Add New User** section is necessary to add User.

Many fields require only basic information.

Information for any fields or features which may require some further explanation is covered just below.

Any information within the lower **Edit Profile** fields are optional.

- **Authorize:** Activate the User's permissions.
- **Notify:** By checking this box, whenever a new User is added, an email notification will be sent to the specific email address which was entered just above.
- **Random Password:** If this box is checked, a Random Password will be generated for this User. Optionally, you may create a custom password for this User in the following fields.
- **Password:** Create a password for this User which they will use to login to the LMS. This password is **case sensitive**.
- **Confirm Password:** Re-enter password in this field to confirm accuracy.
- **Available Roles:** Place a check in the box next to any specific Roles you want to initially assign to this User. Any of the available Roles which are listed here are determined by the current selected Active Team.
- Click **Add New User** near bottom to create the User account.

Edit a User Account

- Click the **pencil** icon next to the User you wish to edit.

When the page refreshes you will see the associated fields which you can review or edit for this User's account.

Use tabs located at the top of the panel in order to access and edit this User's **Credentials, Roles, Password** and **Profile**.

- Please ensure to click **Update** to save any changes.

Delete a User account

There are two delete options for deleting any User, a temporary (soft-delete), or a permanent (hard-delete). A soft-deleted User can be easily restored. A hard-deleted User is permanently deleted from the LMS.

Any hard-delete first requires a soft-delete.

To soft-delete a User;

- Click the **pencil** icon next to the User you wish to delete.

The page will refresh and display the **MEMBER DETAILS** panel.

- Click **Delete**.

The screen will refresh, now showing this User's information grayed out, representing it stands in a soft-delete status.

Learner Management

Search: [   ] [Username ▼]

[Search]

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All Unauthorized Authorized

	Username	Display Name	Address	Telephone	Created Date	Authorized
↶ ✕ 📋	~~mary.jones@gmail.com~~	~~Mary Jones~~			~~4/10/2020 3:44:22 PM~~	☑

Page 1 of 1 First Previous Next Last

[Add New User]   [Merge Users]

[Return]

Restore a Soft-Deleted User

To restore any soft-deleted User;

- Click the grayed-out restore arrow next to the grayed-out User you wish to restore.

Learner Management

Search: [   ] [Username ▼]

[Search]

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All Unauthorized Authorized

	Username	Display Name	Address	Telephone	Created Date	Authorized
↶ ✕ 📋	~~mary.jones@gmail.com~~	~~Mary Jones~~			~~4/10/2020 3:44:22 PM~~	☑

Page 1 of 1 First Previous Next Last

[Add New User]   [Merge Users]

[Return]

Permanently (Hard) Delete a User

To hard-delete any User, the User must first be in soft-delete status.

Once a User is already in a grayed-out, soft-delete status;

- Click the **cross (X)** icon next to the grayed-out User.

Manage Roles for User

Any LMS Learning Content is enrolled to specific Learning Roles.

These Roles are further assigned to Learners, thereby granting them access to a given Role's associated Learning Content.

To Manage Roles for a User:

- Click the **shield icon** next to the desired User.

When the page refreshes, you will see various options for managing User Roles.

- Select a **Role** from the associated dropdown list. The Roles available to select from will be determined by the **Active Team**.
- **Renewal Count:** Select the number of times the role has been renewed.
- **Activation Date** (optional)**:** Specify the date this Role Assignment should start (optional). Entering no value will make the Role immediately active.
- **Start Date** (optional)**:** The Start Date is the date this Role will become active for this User. On this date this User will begin to have access to the Role's associated Learning content. If no Start Date is entered the Role will become immediately active for this User.
- **Due Date** (optional)**:** A Due Date is a date in which this Role will become inactive for this User. On a Due Date, this User will no longer have access to the Learning Content associated with this Role. If no date is entered, the user will have continued access to any Learning Content associated with this Role.
- **Expiration Date** (optional)**:** Specify the date this Role Assignment will expire. Entering no value will indicate no Expiration Date.
- **Re-Activation Date** (optional)**:** Specify a date this User Role assignment will re-activate. A re-activation date typically comes into play when you do not want a Role to be currently active but do want the Role to re-activate at a date in the future. Entering no value will indicate no re-activation date.
- **Send Notification** (optional)**:** check box if you want to send this User a notification to inform them of the Role change.

After making desired selections click **Add Role to User**. This Role will be added to the list of Roles assigned to this User.

- To easily un-assign any Role from any user, click the red **X** next to the Role to be removed.

Modify Learner Status

To Modify Learner Status;

• Click the **Learners** icon next to the desired User.

A pop-up window will display where you can review this User's various statuses.

- **Learner:** Un-checking this box will negate the active Learner status for this User.
- **LMS Admin Type:** These represent any LMS Admin Types this User holds permissions for.
- **Learner's Teams:** Teams listed here are Teams this User belongs to.

Add or Edit a User's Assigned LMS Admin Types

Assign, edit or remove any LMS Admin Type permissions for any User on your Team.

- Click the **Admin** icon next to the desired user.

The **Team Member Status** panel will display.

- Add, edit or remove any User's LMS Admin Type permissions by clicking on the associated button.
- Click **Update** to save any changes.

Learner Account Merge

Periodically it may be necessary to merge or consolidate two separate Learner accounts under one single account.

To Merge Accounts;

- Ensure the proper larger **Active Team** is selected by using the associated dropdown menu; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Expand the desired Team and click on **Learners** to open it's context menu.
- Select **Learner Management** from menu.

The **Learner Management** panel will display.

- Click on **Merge Users**.

The **Select and Merge Users** window will open.

- **Source User:** enter the username of the User you wish to gather data from.
- **Destination User:** enter the username of the User you wish to merge the gathered data into.
- **Roles:** check this box to merge Roles from the Source User to the Destination User. PLEASE NOTE: though any existing Roles will merge, any particular enrollments to specific Learning Folders or specific Learning Elements that may have occurred will not merge.
- **Teams:** check this box to merge Teams from the Source User to the Destination User.
- **Attempts:** check this box to merge Attempts from the Source User and add them to the existing Attempts of the Destination User.
- **LMS Admin Types:** check this box to merge any Admin Types from the Source User to the Destination User.
- After making your appropriate selections click **Merge**.

Select and Merge Users

Merge the Source User account into the Destination User account.

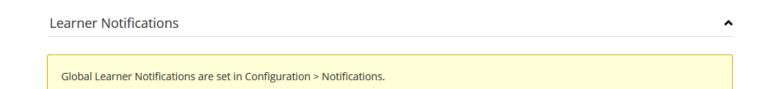| Active Team: ⓘ	All Members
Source User: ⓘ	
Destination User: ⓘ	
Roles: ⓘ	☑
Teams: ⓘ	☑
Attempts: ⓘ	☑
LMS Admin Types: ⓘ	☑

[Merge] [Return]

Learner Notifications

To access Learner Notifications;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- If necessary, use the adjacent arrow to expand the desired team and click on **Learners** to open it's context menu.
- Select **Learner Notifications**.

To configure **Global Learner Notifications**, please refer to the **Notifications** section under the **Configuration** chapter.

Bulk Learner Assignment

The **Bulk Learner Assignment** feature allows an LMS Admin to assign Learning Roles and Access Codes to large groups of Learners in bulk.

To access **Bulk Learner Assignment:**

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Roles** tab.
- Click on **Bulk Learner Assignment**.

The **Bulk Learner Assignment** panel will display.

For the CSV File option;

- **Learner Source:** Select the button for **CSV File.**
- **CSV File:** (Sample .csv file attached at the end of this article). This will be a text file delimited by commas. The first row of the file must contain the column names. These column names can be present in any order, in any case: User Name; Roles (optional); and Access Codes (optional). Each row for each User Name can include Roles (a semicolon separated list of Role names) and Access Codes (a semicolon separated list of Access Codes). In addition, Roles to assign and Access Codes from the web-form will be added to each User. If choosing to use this option, click **Browse** to locate and select the proper .csv file.
- **Access Codes:** Provide a comma separated list of **Access Codes** to assign (Optional).
- **Notify Learners**: Check this box to notify Learners of their new Learning Role assignments.
- **Dates:** Override Learning Role Dates. In some cases an LMS Admin may have opted for a given Learning Role to not become active until a specific future date. Checking the box to Override Learning Role Dates will assign the Role immediately, though the Role will not become active until the future activation date. In almost all cases it is recommended to check box to override dates.
- Click the **Submit** button to bulk assign.

Once the operation is complete, a message will display showing the details of the Bulk Assignment just performed.

For the Roles option;

- **Learner Source:** Select button for **Roles.**
- **All Roles:** Click box to include all Roles.

- **Learning Roles**: Check the box next to the specific **Learning Roles** you desire to supplement with additional and concurrent Roles.
- **Learning Roles to assign:** Check the box next to the specific Learning Roles which will be bulk assigned to the Learning Roles which were selected above.

For the Teams option;

- **Learner Source:** Select button for **Teams**.
- **All Team Members:** check this box to include all active team members. Leave it unchecked to select specific Teams.
- **Access Codes:** Provide a Comma Separated list of **Access Codes** to assign. (Optional)
- **Notify Learners**: Check this box to notify Learners of their new Learning Role assignments.
- **Dates:** Override Learning Role Dates. In some cases an LMS Admin may have opted for a given Learning Role to not become active until a specific future date. Checking the box to Override Learning Role Dates will assign the Role immediately, though the Role will not become active until the future activation date. In almost all cases it is recommended to check box to override dates.
- Click the **Submit** button to bulk assign.

Once the operation is complete, a message will display showing the details of the Bulk Assignment just performed.

💡 **A sample .CSV file can be found at the end of this article.**

📄 BulkLearningRoleAssignment-1.csv

Bulk Assign Learners to a Team

The feature of **Bulk Team Assignment** is used to assign numbers of Learners to a given Team at once in bulk.

To access Bulk Team Assignment;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Click on the **Learners** for the Team you wish to manage to open it's context menu.
- Select **Bulk Team Assignment**.

> 💡 A sample .CSV file can be found at the end of this article.

The **Bulk Team Assignment** window will display.

For the CSV File option:

- **Learner Source:** Select button for **CSV File.**
- **CSV File:** This a text file delimited by commas. The first row of the file must contain the column names. These column names can be present in any order, in any case: User Name; Teams (optional) and Access Codes (optional). Each row for each Username can include Teams (a semicolon separated list of Team names) and Access Codes (a semicolon separated list of Access Codes). Click **Browse** to locate and select the proper .csv file.

- **Assignment:** Select button to either **Add** or **Drop** assignment. Add selected Learners to this Team Membership (and all parent Teams) or Drop the selected Learners from this Team Membership (and all child Teams).
- **Notify Learners**: Check this box to notify Learners of their new Team assignments.
- Click **Submit** to perform desired function.

For Teams or Roles option:

- **Learner Source:** Select button for **Team or Roles.**
- **All Team Members:** Check box to include all Team members.
- **Learning Roles:** Check box next to the desired Learning Roles you wish to assign to the Learners in bulk.
- **Learners:** Click to un-hide search options to search for any desired Learners you wish to include.
- **Assignment:** Select button to either **Add** or **Drop** assignment. Add selected Learners to this Team Membership (and all parent Teams) or Drop the selected Learners from this Team Membership (and all child Teams).
- **Notify Learners:** Check this box to send an email notifying appropriate Learners of their new assignments.
- Click **Submit** to perform desired function.

Once the operation is complete an **'Assign Learner Membership Status'** message will display, showing the details of the **Bulk Team Assignment** just performed.

Assign Learner Membership Status
Total Records: 33
Total New Membership Assigned: 33
Total Duplicate Membership Assignments Ignored: 0
Total Records in Error: 0

Assign   Cancel

BulkTeamAssignment-1.csv

Bulk Learner Import

The feature of **Bulk Learner Import** may be utilized to upload bulk User Lists and then determine which Learning Content these Users will have access to by either assigning them Access Codes or assigning them to Learning Roles.

To access **Bulk Learning Import;**

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Click on the **Learners** module for the specific Team you wish to add Users to in order to open it's context menu.
- Select **Bulk Learner Import** .

The **Bulk Learner Import** panel will display.

CSV User List or Definition Template;

You will need to have a text file delimited by commas. The first row of the file must contain the column names. These column names can be present in any order and may be in upper case text or lower case text.

The following data columns are required by the LMS; though these data columns may contain any titles:

- **User Name**; **First Name**; **Last Name**; **Display Name**; **Email Address**.

The following data columns are optional;

- **Password:** If blank a random Password will be generated.
- **LMS Admin:** A single LMS Admin type name.
- **Teams:** A semicolon separated list of Team names.
- **Roles:** A semicolon separated list of Role names.
- **Access Codes:** A semicolon separated list of Access Codes.
- **Profile fields may include: Prefix, Middle Name, Suffix, Unit, Street, City, Region, Country, Postal Code, Telephone, Cell / Mobile, Fax, Website, IM, Biography, Preferred Time Zone, Time Zone, Preferred Locale, and Photo.**

Any user field as well as any standard or custom profile fields can be mapped in addition to any **Role** or **Team**.

Any Roles to Assign and Access Codes from the web form will be added to each User.

If CSV User List, then the file contents can be imported directly.

If Definition Template, then the file should contain enough records to define all possible input values. Definition templates are usually used just for creating import Definitions and do not need to be imported.

- Click **Browse** to locate and select your comma delimited Learner List file.

Definitions

- **Selected Definition:** Select a definition or choose **<Create New Definition>** to add a new one.
- **Definition Name:** Enter a name for the definition you want to create.
- **Definition Description:** Optionally, you can enter a description to help you explain the new definition.
- **Allow Automatic Import:** Check box to allow this definition to be automatically imported.
- **Automatic Import Notification:** Enter an email address to notify when definitions are automatically imported.

Details

Configure the **Details** for the new definition.

- **User Accounts:** Select **Create Only** if you only wish to create new user accounts. Select **Create or Update** to simultaneously create new users and update existing users.

Role Updates

Various options are available.

- **Create, No Refresh, Drop:** Creates Role memberships if new. Does not change Roles that match and deletes Role memberships that are not listed.
- **Create, Refresh, Drop:** Creates Role memberships if new. Refreshes start and expiration dates for Roles that match, drops Role memberships that are not listed.

- **Create, No Refresh, Expire:** Creates Role memberships if new. Does not change Roles that match and expires Role memberships that are not listed.
- **Create, Refresh, Expire:** Creates Role memberships if new. Refreshes start and expiration dates for Roles that match and expires Role memberships not listed.
- **Create, Refresh, Ignore:** Creates Role memberships if new. Refreshes start and expiration dates for Roles that match and ignores Role memberships that are not listed.
- **Drop Other Team Membership:** Select if all other Team Memberships, other than those specified in the Import CSV file, should be dropped.
- **Learning Roles to Assign:** The Learning Roles available for this Team.
- **Access Codes:** Provide a comma separated list of Access Codes to assign to users. Optional.
- **Notify Learners:** Check the box to send a notification email to each Learner.
- **Notify Portal Administrator:** Check the box to send a notification email for each Learner to the Portal Administrator.
- **Notify Email Addresses:** Sends a notification email for each Learner to a comma-separated list of email addresses. Optional.
- **Notify Email Addresses:** Sends a notification email for each Learner to a comma-separated list of email addresses. Optional.
- **Update Password for Existing User:** Select to update password for existing users. If selected, valid Passwords must be provided for each User. This option will only be active when using the Create or Update option.
- **Random Password for New User:** Select this option if you want random passwords to be generated. Use this option if **password column** is **not present** in the imported CSV file.
- **Force Password Change:** If this option is checked, then the Learners must provide a new password the next time that they log in.
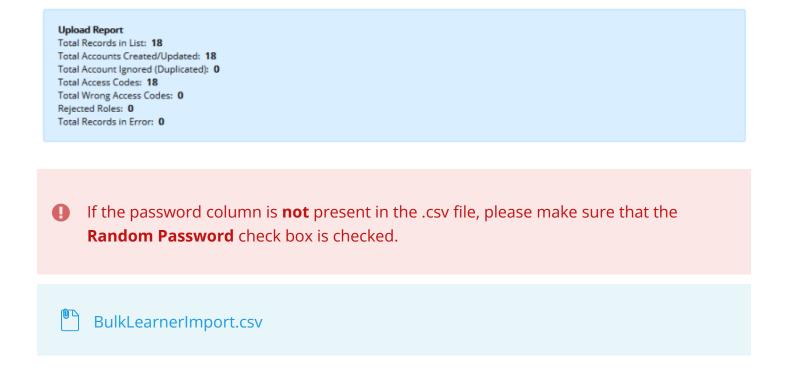
To save your settings as a **new definition**, go up to the **Definitions** section and;

- Click **Create** to save your definition.

> 💡 **A sample .CSV file can be found at the end of this article.**

Once the operation is complete, you will see an **Upload Report** message where you can review the details of the Bulk Learner Import just performed.

Upload Report
Total Records in List: **18**
Total Accounts Created/Updated: **18**
Total Account Ignored (Duplicated): **0**
Total Access Codes: **18**
Total Wrong Access Codes: **0**
Rejected Roles: **0**
Total Records in Error: **0**

> ❗ If the password column is **not** present in the .csv file, please make sure that the **Random Password** check box is checked.

📄 BulkLearnerImport.csv

Bulk Learner Import - FTP & Reports

Bulk Learner Import CSV files can be transferred into a specific directory via FTP (File Transfer Protocol) and then be automatically imported.

This is actually done in the **Bulk Learner Import** section (**Allow Automatic Import**) as described in this section of the LMS Admin Guide. This section shows the setup and directory path to your .CSV file for this import action.

To access **Bulk Learning Import - FTP & Reports**:

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Click on the Learners module of the Team you desire to perform a Bulk Import for to open it's context menu.
- Select **Bulk Learner Import - FTP & Reports**.

- **Automatic Import Schedule:** Frequency for the Automatic Import. The Frequency can be changed in **Host > Schedule > Interzoic AccordLMS General Tasks**.
- **FTP Directory:** Directory on the Web Server where the CSV Bulk Team Import files should be transferred via FTP.
- **Allowed Automatic Import File Names:** Authorized File Names for CSV Bulk Team Import. File formats are the same as when used in the manual upload process.
- **Automatic Import Reports:** Status Reports for CSV Bulk Team Import.

- **Report Storage Duration:** Length of time the Automatic Import Reports will be stored on the server. The duration value can be set or changed in **LMS Admin > Configuration > General Options**.

Bulk Learner Import - FTP & Reports ⌃

CSV files can be FTPed to a specific directory and then automatically imported using Bulk Import Definitions.

Automatic Import Schedule: ⓘ	Every 3 Hours
FTP Directory: ⓘ	\LMS\0\492\Import\Bulk_Import\
Allowed Automatic Import File Names: ⓘ	There are no Bulk Definition for FTP import.
Automatic Import Reports: ⓘ	There are no Report files.
Report Storage Duration: ⓘ	30 days

Return

Configuration

Configuration - Introduction

As an Accord LMS Admin, you will have access to various configuration options in the Configuration tab of the LMS Admin Module. You can configure general options, enable diagnostic SCORM traces and set parameters for data displayed in the Catalog and Enrollment. You may add new **Learning Element types** and **Status Types** and update existing ones. You may also customize notifications and email templates, review and edit enhanced configuration features, license key details and other related information.

NOTE; The Configuration tab may or may not be present depending on the Active Team.

ℹ **The selections available in Configuration are determined by your System Administrator, so not all options may be available to you as an LMS Admin.**

General Options

General Options within Configuration will allow you to establish various settings for your LMS Administration Module.

To access **General Options:**

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- Click on **General Options**.

General Settings Tab

This section contains a variety of configurations for different aspects of the Accord LMS.

- **Hide Active Team:** If a user has permissions for only ONE Team, check this box to hide the Active Team dropdown menu feature. This prevent non-authorized access for non-authorized Teams. Leave this box unchecked for users maintaining permissions for the other Active Teams.
- **Learner Search List Limit:** Type a number in the field to limit the number of records displayed in User Lists.
- **Bulk Import Report Storage:** Length of time the Automatic Import Reports will be stored on the server.
- **Include Past Session Display Limit:** Choose the number of days that a session which is due will display in the LMS Admin Catalog and Enrollment tree-view after a specified due date.

- **Filter by Instructor:** When checked, the only sessions which will display in the Catalog will be sessions where the current user is also the current session instructor.

For more information on how to Filter by Instructor please see; [Display or Filter Sessions by Specific Instructors](#)

- **PDF Font File Name:** In some special cases, you may want to force PDF template fields to conform to a specific UNICODE font. To specify a specific font type, type the font name in the field provided (e.g. SIMSUN.TTF, which supportsChinese characters). An available font file can be found at **/DesktopModules/Interzoic.AccordLMS/Fonts/**. Leave field blank for no forced font.
- **SCORM Student Id:** This will define what information is sent to the SCO in the fields cmi.core.studentid (for 1.2) and cmi.learner_id (for 2004). Select either **Userid** or **Email**.

General Settings	⌄
Hide Active Team: ⓘ ☐	
Learner Search List Limit: ⓘ 1000	
Bulk Import Report Storage: ⓘ 30 Days	
Include Past Session Display Limit: ⓘ 30 Days	
Filter by Instructor: ⓘ ☐	
PDF Font File Name: ⓘ	
SCORM Student Id: ⓘ ○ UserId ● Email	

Default Settings

This section allows you to configure some default settings of the LMS.

 Report > Filters > Advanced Options

- **Attempts:** Select what new Report Filters should have **Attempts** set to by default: **Best**, **Last**, **Last Completed**, **First Completed**.

My Team > Learning Roles > Learning Role Management > Role Details

- **LE Tracking Options:** Select to **Track All LE Attempts** or **Track All Attempts until LE is completed**.
- **Before Start Date Options:** Select what new Learning Roles should have **Before Start Date Options** set by default.
- **After Due Date Options:** Select what new Learning Roles should have **After Due Date Options** set by default.

Folder Attempt Processing

This section provides configuration options for Folder Attempt calculations.

- **Burst Size:** Folder Attempt processes are queued in batches via a scheduled task. Select the batch quantity. Leave blank if you want all the folder attempts to be updated. This setting will affect ALL LMS modules on ALL portals.
- **Period:** Folder Attempt processes will be queued in batches via a scheduled task. Select the time period for the task to be processed.

Virtual ILT (Instructor Led Training)

This section will allow you to configure some settings that affect the way Virtual ILT Learning Elements perform.

- **VILT Launch Preview:** Allows a choice of how many minutes before a VILT Session officially begins, in which period of time a user can launch the Webinar window.
- **Force Open New Windows For Mobile:** When accessing Virtual ILT content on a mobile device, check this option to force the Learning Element to launch inside a new window.

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Search

The Search section will allow for a certain configuration of the Search Index.

The Search Index includes all Learning Element metadata such as: name, summary, details, tags, LEID and custom Education Activity names. It will also include words and phrases contained within the LE source, including SCORM (HTML), File (including HTML, PDF and all Office documents), Pages, PDF Templates and URLs (onsite and offsite).

The updated Search feature will be implemented for all Accord LMS search results - this affect both Learners and Admins UI.

The Search Index is a common data store utilized by all LMS Admin Modules across the DNN codebase. Search results are limited to authorized Learning Elements, for both Learners and LMS Admins.

> ℹ️ **All Search settings are global, except the Search Index Portal Alias which is unique to each LMS Administration Module.**

- **Minimum Word Length:** Enter the minimum word size to be included in the index. Default value is 3.
- **Maximum Word Length:** Enter the maximum word size to be included in the index. Default value is 255.
- **Maximum Crawl Depth (on-site):** Enter the Maximum Crawl Depth to Index 'on-site' HTML pages. This setting only applies to htm(l) files referenced via the File or URL Element Source type. A value of '0' will only index the root level HTML page without any children.
- **Maximum Crawl Depth (off-site):** Enter the Maximum Crawl Depth to Index 'offsite' HTML pages. This setting only applies to htm(l) files referenced via the File or URL Element Source type. A value of '0' will only index the root level HTML page without any children. **Note; off-site indexing has been limited to '0' - no off-site child HTML content will be indexed.**
- **Files Types to Index:** A comma separated list of file extensions such as; doc, docx, xls, xlsx, ppt, pptx, pdf, txt, rtf, htm, html for which direct or iFilter parsing and indexing should be attempted.
- Textual extensions like **html** and **txt** are parsed directly. **Docx** files are natively parsed, without needing any external component. **Binary files** (pdf, doc, dot, rtf, csv, xlt, xls, xlsx, ppt, pptx, etc.) are parsed via **IFilters,** therefore the proper IFilter parser needs to be installed on the web server.
  IFilter Prerequisites:
  - IFilters require the web server to be in **full trust mode** (or the IFilter component must be installed in the Global Assembly Cache).
  - **Windows search service** must be running.
  - To index PDF files the system must have Adobe IFilter installed; http://www.adobe.com/support/downloads/detail.jsp?ftpID=4025

- To index MS Office files, the system must have MS office filter packs installed (not required for doc,docx files) https://www.microsoft.com/en-us/download/details.aspx?id=17062
- XML, CHM, PostScript and many other file types can also be indexed using commercially available IFilters http://www.ifiltershop.com
- For more information on IFilters please see; https://en.wikipedia.org/wiki/IFilter

File Type Portal Alias: Select any valid portal alias for the current portal. The drop down will only present portal aliases associated with the current PortalID. The selected Portal Alias will be used by the indexing engine to access Event Source File types via URL for indexing.

- **Search Index Path:** The location where the Search Index is stored. By default it is **/App_data/LMSSearch**. This location can be manually changed by creating a **Host Setting LmsSearch_IndexFolder** in the database. It is advised to **stop the App Pool** prior to making this change. Whenever customizing, the specified path must be absolute, not relative. Content of an old folder must be manually copied to a new location or a manual Rebuild Index must be triggered.
- **Index Title:** The search will index by Learning Element Title.
- **Index Tags:** The search will index by Learning Element Tags.
- **Index Description:** The search will index by Learning Element description.
- **Index Body:** The search will index by Learning element content in your html and url's.
- **Exact Match:** When checked, only exact matching items will return. If unchecked, will return close-match items.
- **Get More Information**: When clicked, adds to the page details about the index.
- **Compact Index:** Enables an internal flag telling the search indexer to optimize the index on its next run. The optimization will re-arrange internal index files and purge some (but maybe not all) deleted items. Compacting the Index reclaims space from deleted items in the Index Store. It is recommended only when there are many **Deleted Documents** in Index Store. Compacting may require twice the size of current Index Store during processing. If only a few items delete, nothing will change.
- **Rebuild Index:** Enables an internal flag telling the search indexer to start from scratch. All current index items will be deleted and each Learning Element in the Catalog will be indexed. The normal operation of the search indexed is to include only any Learning elements created or updated after the previous run. Re-Indexing deletes existing content from the Index Store and then re-indexes everything.

Note; Both Compacting and Re-Indexing are done by Learning Elements Search Crawler scheduled job.

Search Criteria

One or more words can be specified if intended to obtain search results containing Learning Elements with either the first term **or** any of the other terms.

If a complete word is not known or more than one Learning Element containing certain information needs to be found, an asterisk (*****) **wild card** can be used to match words **starting with** or **ending with** a specific character. Wild card and non-wild card terms can be mixed in the same search.

Phrases can also be specified using **double quoted text**. Quoted and non-quoted terms can be used in the same search.

Enrollment Log

In this section you have the option to activate the generation of log files from every enrollment made in the LMS

- **Enable Enrollment Logs:** Check this box to enable enrollment logs to be saved for each enrollment performed.
- **Days to keep Enrollment Logs:** Select how many days to archive Enrollment logs.

Diagnostic Trace

If any issue is affecting the way your SCORM content behaves you can enable a diagnostic trace that will help the support team isolate the cause of the problem. Use only when directed by Support.

- **Enable Diagnostic Trace:** Check box to enable diagnostic SCORM tracing of Learning Elements within the LMS.
- **Days to keep Trace Logs:** Enter the number of days you want to archive trace logs.
- **Show Track Logs:** Check box to display SCORM Trace Logs, including diagnostic and error logs, in the pop-up Learning Element window.
- Scroll to bottom of page and click **Update** to save any settings changes.
- If choosing to abort from any changes, click **Cancel**. This will return you to the top level Configuration page.

Diagnostic Trace ⌄

Enable Diagnostic Trace: ⓘ ☐

Days to keep Trace Logs: ⓘ [1] Days

Show Track Logs: ⓘ ☐

Completion Events HTTP Request

Number of Retries: Number of times the system will re-send the http calls.

Waiting time after window closing: Normally the http request is sent immediately when the LE window is closed. If the closing event is missed, the system will automatically send the http request after this many minutes.

Process Requests After: Any HTTP requests will only be resent after this date.

Completion Events HTTP Request ⌄

Number of Retries: ⓘ [3]

Waiting time after window closing: ⓘ [240]

Process Requests After: ⓘ [5/18/2020] ▦

Notifications

The Notifications section lets you select General Options, set Learner Notifications and determine Limit Warnings for various status changes and conditions. You may also create and modify Email Templates and view Available Tokens for your email templates.

To access Notifications;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- Click on **Notifications**.

General Settings

- **"From" Email Address:** Type in the email address the notifications will be sent from. If no email is provided, the site Admin email address will be used.
- **SMTP Server and Port:** Review Host > Host Settings > Advanced Settings for additional SMTP Server Settings.
- **Enable LMS Email:** Select this option to enable messages to be sent from this Portal. If this is not checked, all outbound email will be disabled.
- **Email Batch Period:** Type in the number (in minutes) when you want the notifications sent out. A scheduled task will run at this frequency and send all queued notifications. A period set to 0 or left blank will result in all email notifications being sent immediately.
- **Email Batch Quantity:** Type in the number of emails per batch. Emails are queued and sent out in batches via a scheduled task and will use this number for the amount of emails per

batch. Leave this field blank if you want all the notices to be sent out at the same time. This setting affects ALL LMS on ALL portals.

- **Portal Alias:** Select the portal alias to be used from the list. This will be used to generate the URLs inside the emails.

Learner Notifications

- **LE Enrollment:** Send notification to Learners when Enrolled or Dropped, by self or by an LMS Admin, to a Learning Element.
- **Session Registration:** This will send a notification to the user who has been Registered to a Session, whether by self or by an LMS Admin.
- **LE Attempts:** Select the type of Learning Element attempt notifications to send to ALL Learners utilizing the content in this LMS Admin Module.
- **Conditions Satisfied:** Select this option to send a notice if all Conditions are satisfied for All LE or for a Specific LE.
- **Learner Comments:** Send notifications when Learners leave Comments for a Learning Element. Requires SCO support for Comment input.

Folder Types

This section of Configuration allows you to set up Folder Types and their configurable rules to help in the organization of your Learning Catalog. Names, icons, and rules for each Folder Type can be edited and customized to best suit your business requirements. You can add new Folder Types to complement or merge with existing Folder Types.

To access Folder Types;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- From the Configuration panel, click on **Folder Types.**

The Folder Type List displayed will show the five preconfigured Folder Types that come with the LMS. These Folder Types can be edited if needed and new Folder Types can be created for custom organizational requirements.

- **Chapter:** Chapters can be used to group the Learning Elements (LE) together in more manageable segments. Chapters appear as section headings along with all of their LE within a Course list view.
- **Collection:** Collections can be used to group Courses together in more manageable segments. Collections appear as section headings along with all of their Courses within a Learning Path list view.
- **Course:** A Course is a traditional way to group Learning Elements. Once the LE are completed, the Course is considered complete. Courses can have Chapters and LE as children.

- **Folder:** Folders can have Folders, Learning Paths, Courses and LE as children. It is very flexible but not a formal member of the Learning Path / Course paradigm.
- **Learning Path:** Can be used for organizing a set of Courses together. Learning Paths can have Collections and Courses as children.

Editing a Folder Type

All of the pre-configured Folder Types can be edited.

- **Click** on the pencil icon.

The Folder Type Details window displays.

- Perform the necessary updates.
- Click **Update** to save changes.

Add new Folder Type

- Click **Add new Folder Type**.

- **Folder Type Name:** Enter the name of the new Folder Type.
- **Icon Small, Icon Medium, Icon Large, Icon X-Large:** Icons used to identify Folder Type.
- **Learner Presentation:** Select whether to show Drill Down or Expanded (that can optionally be hidden) folder in the Learner UI.
- **Scoring Process:** Folder Types can have their Scoring Process set to Roll Up or Pass Through. **Roll Up** all LE and child Folder scores to the Folder. **Pass Through** all LE and child Folder scores to the parent Folder.
- **Child Types:** Select the child types this folder type can create.
- Click **Update** to save and create your new Folder Type.

Folder Type Details

Folder Type Name: * ⓘ `Assignments`

Icon Small: * ⓘ `FlatFolder-16x16.png` ▼

Icon Medium: * ⓘ `FlatFolder-24x24.png` ▼

Icon Large: * ⓘ `FlatFolder-32x32.png` ▼

Icon X-Large: * ⓘ `FlatFolder-48x48.png` ▼

Learner Presentation: ⓘ ◉ Drill Down   ○ Expanded

☐ Hide Folder from Learner UI

Scoring Process: ⓘ ○ Roll Up   ◉ Pass Through

Child Types: ⓘ ☐ Chapter
☐ Collection
☐ Course
☐ Folder
☐ Learning Path
☑ Learning Element

[**Update**] [Cancel] [Delete]

Delete a Folder Type

- Click the **pencil icon** next to the Folder Type you want to delete.

Folder Types   Active Team: `All Members` ▼

Folder Type List   ⌃

	Icon	Name
✎	📁	Assignments
✎	📖	Chapter
✎	📚	Collection
✎	▤	Course
✎	📂	Folder
✎	🏛	Learning Path

[Add new Folder Type]

[Return]

In the Folder Type Details window:

- Click **Delete**.

Folder Type Details

Folder Type Name: * ⓘ	Assignments
Icon Small: * ⓘ	FlatFolder-16x16.png ▾
Icon Medium: * ⓘ	FlatFolder-24x24.png ▾
Icon Large: * ⓘ	FlatFolder-32x32.png ▾
Icon X-Large: * ⓘ	FlatFolder-48x48.png ▾
Learner Presentation: ⓘ	◉ Drill Down ◯ Expanded
	☐ Hide Folder from Learner UI
Scoring Process: ⓘ	◯ Roll Up ◉ Pass Through
Child Types: ⓘ	☐ Chapter
	☐ Collection
	☐ Course
	☐ Folder
	☐ Learning Path
	☑ Learning Element

Update **Cancel** **Delete**

- Click **Yes** to confirm action.

Confirm

Are you sure you want to Delete this item?

Yes **No**

Learning Element Formats

This section of Configuration allows you to set up the types of Learning Elements that can be selected when adding Learning Elements to the Catalog.

You can add new types or modify existing ones.

Learning Element Formats are categorized by their specific **Element Source**.

To access Learning Element Formats;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- From the Configuration page click on **Learning Element Formats.**

By default, the Accord LMS comes pre-configured with dozens of Learning Element Formats.

Learning Element formats can be added or modified to best suit your needs.

The Default list will display each time a new Learning Element is created.

SCORM: Learning Element Formats associated with SCORM Content Objects.

Assessment and Survey: Learning Elements Formats associated exclusively with Surveys and Assessment

Additional: Learning Element Types associated with the non-SCORM content, including (but not limited to) URLs, files, modules, Text/HMTL, etc.

Add New SCORM Format

- Click **Add New SCORM Format.**

A detail page displays with options for creating a new Learning Element Type.

- **Format Name:** Type a title for the Learning Element Format.

- **Icons:** Select an icon which visually represents the Learning Element Format. There are four sizes available. Each icon will be used to represent this Learning Element in various sections.

- **Dimensions:** Enter a **Width** and **Height** for the Launch Window used to present the Learning Element.

- **Advanced Settings:** Click the down arrow to expand this section.

- **Launch Window:** Select the type of window (Pop-up or Modal) that the Learning Element will be launched in.

ℹ️ A **Pop-up** window is a secondary browser window in which the Learning Element is launched on top of the original LMS window.

ℹ️ A **Modal** window is a secondary browser window in which the Learning Element is launched in front of the original LMS window. The focus is retained in the Modal window and it must be closed in order to access the original LMS window from which it was launched.

- **Force additional Popup for Mobile:** Provides an additional pop-up window for all mobile devices. This will avoid IFrame usage and improve presentation.

Status Options: Select the report status for this Learning Element, from these three options:

- **Success over Completion** (default).
- **Completion Only** (only reports Completion, not Success).
- **Success Only** (only reports Success, not Completion).

- **Duration Reporting:** Select if SCO duration should be reported by SCO or by LMS time tracking. If you notice troubles in the completion or duration of any SCO content please try changing these options.

- **Scorable (required for Quizzes):** Select if this LE Type will be scorable. Those scorable LE can contribute to the Folder and Course scores.

- **No Resume:** Select this option to disable all Learning Elements (even those with this functionality built in) from Resuming.

> ℹ️ The Accord LMS supports resume (also known as **bookmarking**), which allows a Learner to automatically return to where they left off when re-entering a Learning Element. By default, this feature is turned off because some SCO have problems with possible data loss.

Combine Legacy SCO settings:

- **Captivate Quiz (5.X):** Select this option when working with Captivate Quizzes. This feature Forces Captivate Quizzes (5.x and earlier) to wait for a status response before sending another status update. Only use this setting for older Captivate Quizzes.
- **Articulate (`09):** Select this option when working with old Articulate content. Forces IE=8 compatibility for older Articulate content ('09 and earlier).

> ⚠️ **If you use Captivate to create your Quiz SCOs, create a Learning Element Type specifically for all your Captivate Quizzes and make sure to set this option.**

- Click **Update** to create your New Learning Element Format.

Add New Assessment or Survey Format

- **Expand** the Assessment and Survey section;
- Click **Add New Assessment or Survey Format.**

Format Name: Type the title of the new Assessment or Survey Format.

- **Icons:** Select an icon which visually represents the Learning Element Format. There are four sizes available. Each icon will be used to represent this Learning Element in various sections.

- **Dimensions:** Enter a **Width** and **Height** for the Launch Window used to present the Learning Element.

- **Advanced Settings:** Click the down arrow to expand this section.

- **Launch Window:** Select the type of window (Pop-up or Modal) that the Learning Element will be launched in.

Status Options: Select the report status for this Learning Element, from these three options:

- **Success over Completion** (default).
- **Completion Only** (only reports Completion, not Success).
- **Success Only** (only reports Success, not Completion).

- Click **Update** to create your New Learning Element Type.

Add new Additional Format

- **Expand** the Additional section;
- Click **Add new Additional Format.**

- **Format Name:** Type a title for the Learning Element Format.

- **Icons:** Select an icon which visually represents the Learning Element Format. There are four sizes available. Each icon will be used to represent this Learning Element in various sections.

- **Dimensions:** Enter a **Width** and **Height** for the Launch Window used to present the Learning Element.

- **Advanced Settings:** Click the **down arrow** to expand this section.

- **Launch Window:** Select the type of window (**Current, New, pop-up** or **Modal**) that the Learning Element will be launched in.

- **Force additional Pop-up for Mobile:** Provide an additional pop-up window for all mobile devices. This will avoid IFrame usage and improve the presentation.

- **Force Download:** Select this option when using the PDF Template Event Source. This will force the PDF file to download, regardless of the browser's plug-in status.

- Click **Update** to save the changes and return to the Learning Element Format listing page.

Edit an existing Learning Element Format

- Click on the **pencil icon** next to an existing Learning Element Format in the list.

- In the **Learning Element Format** page, modify the options as needed.
- Click the **Update** link to save the changes and to return to the Learning Element Formats listing page.

Delete an existing Learning Element Format

- Click on the **pencil icon** next to an existing Learning Element Format in the list.

- In the **Learning Element Format** page, scroll down to the bottom of the page;
- Click the **Delete** button.

Status Types

This feature within the Configuration section allows you to set up certain Status Types used to display the Completion Statuses of various Learning Elements within the Learners' **My Courses**.

To access Status Types;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- While in the Configuration panel, click on **Status Types.**

The **Status Types** list shown below, comes pre-configured in the Accord LMS. You can modify existing icons to display custom icons.

- Click **Return** to go back to the Configuration page.

Edit an existing Learning Element Status Type

- Click/Tap on the **pencil icon** next to an existing Learning Element Status type in the list.

- In the **Status Type Details** page, modify the options as needed.
- Click the **Update** link to save the changes and return to the Status Type listing page.

Status Type Details

Type Name: * ⓘ	Completed
Icon Small: * ⓘ	PieGreen-16x16.png ▼
Icon Medium: * ⓘ	PieGreen-24x24.png ▼
Icon Large: * ⓘ	PieGreen-32x32.png ▼
Icon X-Large: * ⓘ	PieGreen-48x48.png ▼

[Update] [Cancel]

Education Activities

The Accord LMS provides the ability to group Education Activities.

Education Activities will facilitate the job of distributing Education Awards to your Learners.

To access Education Activities;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- While in the Configuration panel click on **Education Activities**.

Initially, the Education Activity List will show only Accord LMS default activities.

You may create your own Education Activities.

Add New Education Activity

- Click **Add New Education Activity.**

The **Education Activity Details** panel displays.

- **Name:** Enter the name of the new Education Activity.
- **Status:** Indicate if this Education Activity will be **Active** or **Inactive** by selecting the radio button next to each option.
- **Gaming Activity:** Select if this Education Activity will create a Gaming Activity (with the same name).
- **Description:** Optionally enter a description to help you identify this Education Activity.
- Click **Update** to save changes.

Education Activity Details

Name: *	Attributes and Performance
Status:	◉ Active ○ Inactive
Gaming Activity:	☐
Description:	Education Activity for Attributes and Performance

Update Cancel

The new Education Activity will then display in the **Education Activity List.**

Education Activity List

	Name	Status
✎	Attributes and Performance	Active
✎	LMS Admin Master	Active
✎	LMS Learner Master	Active
✎	Workplace Conduct	Active

Add New Education Activity

ILT Resources

The **ILT Resources** feature allows you to add both Instructors and Locations which can be selected when creating and adding a new **Instructor Led Training (ILT)** session to the Catalog.

You can add new **ILT Resources** or modify existing ones within the Source Team or a Parent Team.

To access ILT Resources;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- From the Configuration panel click on **ILT Resources.**

Initially, there will be no Instructors or Locations present within your LMS. These will need to be created prior to adding a new Session to your catalog.

Add New Instructor

- Click **Add New Instructor**.

Virtually any user of the LMS can be set up as an Instructor. Once the user that is going to serve as an ILT Instructor has been added to the LMS, you can use the **Instructor** screen to set him up as an ILT Instructor.

- Mark **All Team Members** or individual **Learning Roles** to search for the user which will be used as the Instructor.

- Use the **Search String** field to locate the user of your choice.
- Click/Tap **Search**.

The list will refresh bringing up the results for your query.

- Select the desired user from the list.

- **Status:** Select for the Instructor to be **Active** or **Inactive**. Only Active Instructors may be utilized.

- **Owner:** From the drop-down menu, select which Team owns and can edit this Instructor.

- **Team Availability:** Select which Teams may utilize this Instructor.

- Click **Create** to save the new Instructor.

The recently created Instructor will be displayed in the list along with some additional information such as **Status** and **Owner.**

Edit an Instructor

• Click on the **pencil icon** next to the Instructor you wish to edit. Have in mind that only members of the Instructor Source Team or from a Parent Team can edit Instructors.

The only information that can be updated when editing an Instructor is the Status and the Team Availability.

- Perform the updates required.
- Click **Update** to save your changes

Delete an Instructor

- Click on the **pencil icon** next to the Instructor you wish to edit. Have in mind that only members of the Instructor Source Team or from a Parent Team can edit Instructors.

- Click **Delete** to save your changes

Add New Location

- Click **Add New Location**.

- **Name:** (required) Enter a Location name or designation.
- **Status:** Select if this Location will be **Active** or **Inactive**. Only Active Locations may be utilized.

Location Type:

- **Physical - Class or Venue:** Select this option if adding a physical location.
- **Virtual - General:** Select if location is to be a Virtual, such as an online seminar.
- **Virtual - GoToWebinar:** Select this option if you will be using a GoToWebinar Location. (Please see GoToWebinar and GoToTraining Integration in our Appendix for information on how to configure these Location Types).
- **Virtual - GoToTraining:** Select this option if you will be using a GoToTraining Location. (Please see GoToWebinar and GoToTraining Integration in our Appendix for information on how to configure these Location Types).

- **Max Learners:** Maximum number of Learners to be allowed in this location. Leave blank for unlimited.
- **Information URL:** Input the URL for the Location website or online map. This information can be very useful for Learners attending Instructor Led Training sessions.
- **Owner:** From the drop-down menu, select which Team owns and can edit this Location.
- **Team Availability:** (required) Select which Teams can utilize this Location.
- **Description:** Optionally, enter text that best describes or helps you identify this Location.
- Click **Create** to save your new Location.

The recently created Location name will be displayed in the list along with some additional information such as **Max Learners**, **Status** and **Owner**.

Edit a Location

- Click on the **pencil icon** next to the Location you wish to edit. Have in mind that only members of the Location Source Team or from a Parent Team can edit Locations.

- Perform the necessary updates.
- Click **Update** to save changes.

Delete a Location

- Click on the **pencil icon** next to the Location you wish to edit. Have in mind that only members of the Location Source Team or from a Parent Team can edit Locations.

- Click **Delete.**

Role Based Redirection

Redirect a user to a specific page, portal or URL depending on their Role and or Team.

This typically comes in to play when desiring for a Learner to be specifically redirected to a particular area immediately after logging in.

Redirect Page Setup

Role Based Redirection is provided by a dedicated Accord LMS Learner module which is not used for any Learner presentation.

Example; A landing page you desire to redirect Learners to immediately after they login.

- Decide which page you want to use for the Redirect Page.
- Add a Learner module to that page and then go to the **Configuration** tab.

To establish Role-Based Redirection;

- Click on the **My Courses** tab.
- Once in My Courses, click on **Configuration.**

- Click on the **Access** heading to expand this section.

Allow Redirect;
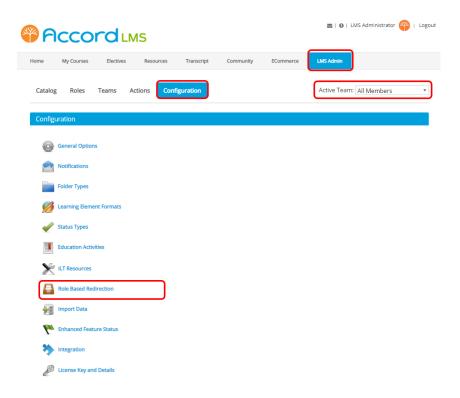
- Select **Never, Always** or **Only with access code**.
- Scroll to bottom and click **Update** to save changes.

After performing the above steps;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- Once in the Configuration panel, click on **Role Based Redirection**.

Initially, the **Role Based Redirection List** will be empty.

- Click **Add New Redirect** to add a new redirection.

- Select a **Role or Team** from the dropdown list.

- Input a **Redirect URL** in the field provided.

- Click the **check mark** to save changes.

Editing a Redirection

To edit a Role Based Redirection;

- Click the **pencil icon** next to the Redirection you want to edit.

- Perform the required modifications.
- Click the **check mark** to save changes.

Deleting a Redirection

To delete a redirection;

- Click the **red cross** next to the redirection you want to delete.

Import Data or Folder Attempts

The **Import Data** feature allows you to bulk Import your historical folder usage record.

This feature lets you bring your historical data (from other systems) into the Accord LMS. Only 100% completed Folder records can be imported.

To access Import Data;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Select the **Configuration** tab.
- Once in the Configuration panel click on **Import Data**.

❗ The Import Folder Attempts feature is only available to **Host Accounts**.

Important Points

- **Username (Required):** Provide the username to whom the folder attempts belong.
- **FolderID (Required):** This is the auto assigned **Folder ID** that can be obtained from the Advanced Settings of the **Folder Details**.
- **CompletionDate (Required):** This field must contain the Date of Completion for the entire Folder.

- **Score (Optional):** Column must contain a number between 0 and 1 (where 1 corresponds to 100% of folder completion.
- **ArchiveDueDate (Optional):** Input a date and time for when the **Attempts** will be archived.

- Users must be enrolled to the folder to import the attempts.
- Child folder updates will cause parent folders to recalculate so import the bottom folders first and work your way to the top if you have multi-level folder scores to import.
- Click on the **Folder Import** Heading to open this section.
- Click **Choose File** next to **Select CSV File** in order to locate and select the desired file.
- Click **Import**.

A sample .csv file is attached at the end of this article.

💡 **A sample .CSV file can be found at the end of this article.**

- Once the Import Process finishes, a status report will display.

📄 Imp_Folder_Attempts.csv

Import Teams

The Team Import feature allows Teams to be quickly created in your LMS.

Why are Teams used? Teams are used to organize various learners into logically segmented groups. Teams may represent different company departments or different company locations.

If you want to create a full Team hierarchy or add multiple Teams, you have an efficient option of using the **Team Import** feature.

Should you desire to create individual Teams, while using the **LMS Admin** tab, click on **Teams**. For documentation to help create new Teams, click here; http://help.accordlms.com/m/11168/l/127072-teams-introduction.

Please follow steps below to quickly Import Teams into your Accord LMS.

What is Needed to Import Teams?

The **Team Import** process begins by setting up any Teams desired for import in a (.csv) file which can then be readily uploaded into your Accord LMS portal.

A sample (.csv) file, which can be edited through Microsoft Excel or similar software, may be downloaded from https://www.accordlms.com/resources/documentation.

Important Comments Regarding (.csv) Files Used for Import

The (.csv) file is processed from the top down. Parent Teams must either already exist in the system or be listed in the (.csv) file before the Child Team which references them.

Duplicate Team Names will not Import.

Errors will result if the same Team Name already exists within the LMS or if duplicated within the (.csv) file being imported.

The Teams Tab

Just below is an image displaying what a new Accord LMS portal may look like while in the LMS Admin **Teams** tab.

Initially the Teams tab may only contain the parent, or top, **All Members** team.

Prepare for Team Import

Once you have any **Teams** desired for import setup and saved in a (.csv) file;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Wave over the **LMS Admin** tab .
- Click on the **Configuration** tab.
- Once in Configuration, click on **Import Data**.

- Once the **Legacy Import Data** panel opens, click on **Team Import** header to open section if necessary.

Note: Please use the proper (.csv) format (**Folder Import**, **Learning Element Import** or **Team Import**), otherwise files will fail to import.

- Next to **Select CSV File**, click **Choose File**

- Once you have selected the chosen Team (.csv) file from your computer system, click **Import**.

After Import, a record will display showing how many Teams were successfully created during the process. The number of Teams represented on this record will reflect any integrated Child Teams which may have been situated under a Parent Team.

Error Reports: The LMS will provide an error report if any rows in the (.csv) file were unable to import. Such error reports will itemize the specific line in the (.csv) file which failed to import as well as the general reason behind failure.

In the image below you will see the new Teams created within the LMS portal during the Import Team process. In this particular example, the top new Team created under the **All Members** Team, is a Team titled **A New Hierarchy**, having Child Teams of **Accounting** and **Support**.

When noting the **Teams Import** record associated above, a total of **7** teams were imported, meaning **4** additional Child Teams were created during this same import process which will exist under the Accounting or Support Teams and can be accessed by clicking their arrows.

Teams	Count
All Members	
Learners	100
Content Admin	0
Learner Admin	0
Report Admin	1
Team Admin	4
A New Hierarchy	
Learners	0
Content Admin	0
Learner Admin	0
Report Admin	0
Team Admin	0
Accounting	
Support	

Import Roles

The Role Import feature allows Roles and/or larger Role Groups to be quickly created within your LMS system.

Why are Roles used?

Roles are used to effectively and easily assign Learning Content, referred to within the LMS as Learning Elements.

Specific types of Learning Elements can be associated with specific types of Roles.

Learners are subsequently assigned to these specific Roles which then allows them access to the specific Learning Elements associated with these Roles.

Role Groups are larger groups which hold numbers of varying but yet associated types of Roles.

If you want to create a full Role hierarchy or add multiple Roles at once, you have the efficient option of using the **Role Import** feature.

Please follow steps below to quickly Import Roles and/or larger Role Groups into your Accord LMS.

Should you desire to create individual Roles instead;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Roles** tab.
- Click on **Add New Role**.

What is Needed to Import Roles?

The **Role Import** process begins by setting up any Roles or Role Groups desired for import in a (.csv) file which can then be readily uploaded into your Accord LMS portal.

A sample (.csv) file, which can be edited through Microsoft Excel or similar software, may be downloaded from; https://www.accordlms.com/resources/documentation.

Important Comments Regarding (.csv) Files Used for Import

To prepare for Importing Roles and/or Role Groups; columns A-F across the (.cvs) file need to be in the following format;

- GroupName/RoleName/ActivationDate/StartDate/DueDate/ExpirationDate
- Any Dates are optional.

Duplicate Role Names will not Import.

Errors will result if the same Role Name already exists within the LMS or if duplicated within the (.csv) file being imported.

The Roles Tab

Just below is an image displaying what a new Accord LMS portal may look like while in the LMS Admin **Roles** tab, which initially may typically contain only a small number of pre-established Roles.

Prepare for Role Import

Once you have any Roles and/or Role Groups desired for import properly setup and saved on a .csv file;

• Ensure the proper **Active Team** is selected; should there be more than one Active Team.
• Wave over the **LMS Admin** tab.
• Click on the **Configuration** tab.
• Once in the Configuration panel, click on **Import Data**.

Once the **Legacy Import Data** panel opens, click on **Role Import** header to open section if necessary.

Note: Please use the proper (.csv) import format; **Folder Import**, **Learning Element Import**, **Team Import** or **Role Import**, otherwise files will fail to import.

- Next to **Select CSV File**, click **Choose File**

- Once you have selected the chosen Role (.csv) file from your computer system, click **Import**.

After Import, a record will display showing how many Roles were successfully created within the LMS during the import process.

Error Reports: The LMS will provide an error report if any rows from the (.csv) file were unable to import.

Such error reports will itemize the specific line in the (.csv) file which failed to import as well as a general reason behind failure.

In the image below you will see the new Roles and/or Role Groups created within the LMS portal during the Import Role process.

In this particular example there were 3 new Roles imported and 1 larger Role Group imported.

One Role was created in the **Boston-North Office** which does not display in the illustration below but would display should the **Boston-North Office** be selected from the dropdown menu.

Import Learning Folders

The Accord LMS provides the ability to easily Import Learning Folders.

This facilitates the quick creation of Learning Folders within your Accord LMS Learning Catalog and saves from having to create numerous Learning Folders from scratch.

Please follow steps below to quickly Import Learning Folders into your Accord LMS Learning Catalog.

What is Needed to Import Learning Folders?

The process begins by setting up any Learning Folders desired to import in a (.csv) file which can then be readily uploaded into your LMS portal.

A sample (.csv) file, which can be edited through Microsoft Excel or similar software, may be downloaded from https://www.accordlms.com/resources/documentation.

Important Comments Regarding (.csv) Files Used for Import

The (.csv) file is processed from the top down. Parent Folders must either already exist in the system or be listed in the (.csv) file before the Child Folder which references them.

Any Learning Folders having duplicate names will not import.

Errors will result if a Learning Folder with the same name already exists within the LMS or if duplicated within the (.csv) file being imported.

The LMS Learning Catalog

Just below is an image displaying the Accord LMS Learning Catalog, showing any existing Learning Catalog Folders.

- Go to **LMS Admin > Catalog** tab

The **My Catalog** Folder is always the head, or parent folder. All other Learning Folders are contained within this Parent Folder.

The **_Orphans** Folder shown below directly under the **My Catalog** Folder, is a Folder automatically created by the LMS whenever a Learning Element is removed from a given Learning Folder, under the conditions where this very same Learning Element does not already reside within another Learning Catalog Folder.

This **Orphans** Folder feature allows for an LMS administrator to quickly locate and re-use former Learning Elements without needing to locate the original files.

Prepare for Folder Import

To add Learning Folders to your Learning Catalog;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** Tab.
- Click on the **Configuration** Tab.
- Once in the Configuration panel, click on **Import Data**.

- Once the **Legacy Import Data** panel opens, click on the **Folder Import** header to open this section if necessary.

Note: Please use the proper (.csv) format (**Folder Import**, **Learning Element Import, Team Import** or **Role Import**), otherwise files will fail to import.

- Next to **Select CSV File**, click **Choose File**

Legacy Import Data

Folder Import ⌄

Import legacy Folder records. **More Information...**

Select CSV File: ⓘ ⟨ Choose File ⟩

Import

- Once you have selected the chosen Learning Folder (.csv) file from your computer system, click **Import**.

Once the import function occurs, a record will display showing how many Learning Folders were successfully created in the Learning Catalog during the process. The number of Folders represented on this record will also reflect any integrated Child Folders which may have been situated under a Parent Folder during the import process.

Error Reports: The LMS will provide an error report if any rows in the (.csv) file were unable to import. Any such reports will itemize the specific line in the (.csv) file which failed to import as well as the general reason behind failure.

Import

Folders Import
Total Records in List: **5**
Total Folders Created: **5**
Total Folders Updated: **0**
Total Records in Error: **0**

In the example below, you will now recognize the 5 new Learning Folders which were created within the Learning Catalog during the Folder Import process. Any Folders with adjacent arrows contain sub-folders.

Import Learning Elements

The Learning Element Import Feature facilitates quick creation of multiple Learning Elements within your LMS Learning Catalog.

This saves time from having to populate numerous Learning Elements from scratch.

Please follow steps below to quickly Import Learning Elements into your LMS Learning Catalog.

What is Needed to Import Learning Elements?

The **Learning Element Import** process begins by setting up any Learning Elements desired for import in a (.csv) file which can then be readily uploaded into your Accord LMS portal.

A sample (.csv) file, which can be edited through Microsoft Excel or similar software, may be downloaded from https://www.accordlms.com/resources/documentation.

Important Comments Regarding (.csv) Files Used for Import

The (.csv) file is processed from the top down. Any Parent Catalog Folders used to receive Learning Elements during the import process must either already exist within the system or be specifically listed in the (.csv) file.

Duplicate Learning Element Names will not Import.

Errors will result if the same Learning Element Name already exists within the Learning Catalog or if duplicated within the (.csv) file being imported.

The Learning Catalog

To peruse your existing Accord LMS Learning Catalog;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Catalog** tab.

The image below displays an Accord LMS Catalog , showing a number of Learning Folders which may contain Learning Elements.

In this example, the ***Managing Performance*** Learning Folder was opened using it's adjacent arrow, displaying the 2 Learning Elements currently contained within.

The example which follows will show the quick and easy process to import 3 additional Learning Elements into this Learning Folder.

Prepare for Learning Element Import

Once you have the desired Learning Elements desired for Import setup and saved in a (.cvs) file, to Import Learning Elements into your Learning Catalog;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- Once within the Configuration panel, click on **Import Data**.

- Once the **Legacy Import Data** panel opens, click on the **Learning Element Import** header to open this panel if necessary.

Note: Please use the proper (.csv) format (**Folder Import**, **Learning Element Import, Ream Import** or **Role Import**), otherwise files will fail to import.

- Next to **Select CSV File**, click **Choose File**

Learning Element Import

Import legacy Learning Element records. **More Information...**

Select CSV File: ⓘ   Choose File

Import

- Once you have selected the chosen Learning Element (.cvs) file from your computer system, click **Import**.

Learning Element Import

Import legacy Learning Element records. **More Information...**

Select CSV File: ⓘ   Sample Import LEs.csv

Import

Once the Import function occurs, a record will display showing how many Learning Elements were successfully created during the process.

Error Reports: The LMS will provide an error report if any rows in the (.csv) file were unable to import. Any such reports will itemize the specific line in the (.csv) file which failed to import as well as the general reason behind failure.

Learning Elements Import
Total Records in List: 3
Total LEs Created: 3
Total LEs Updated: 0
Total Records in Error: 0

In the image below, please note the 3 additional Learning Elements which were created inside the *Managing Performance* Learning Catalog Folder during the Learning Element Import process. It now contains a total of 5 Learning Elements rather than the prior 2.

Enhanced Feature Status

The **Enhanced Feature Status** section allows you to view the status of various enhanced features used within the LMS.

To access Enhanced Feature Status;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- Once in the Configuration panel, click on **Enhanced Feature Status**.

Ajax Extensions: Ajax Extensions are required. These are provided by default in all SaaS Hosted solutions. Make sure these are enabled: **Host Settings** > **Advanced Settings** > **Other Settings** > **Enable AJAX**.

If you are running on localhost or your own dedicated server, you may need to install the extensions yourself.

Enhanced Charting: The Accord LMS utilizes the **Telerik Charting** control on the **Learner > Dashboard** page and in some of the **Reports Modules**. It should be automatically enabled when the module set is installed.

If you see a pie chart displayed (like in the image above) this means charting is properly configured and enabled. If not, click **Configure**. This will enable you to update your web.config file.

Some shared web hosts do not allow applications to update the web.config file programmatically. In this case, you will need to make the edits to web.config manually.

web.config

Make the following updates:

<system.web>

   <httpHandlers>

  <addpath="ChartImage.axd"type="Telerik.Web.UI.ChartHttpHandler"verb="*"validate="false"/>

   </httpHandlers>

</system.web>

<system.webServer>

   <handlers>
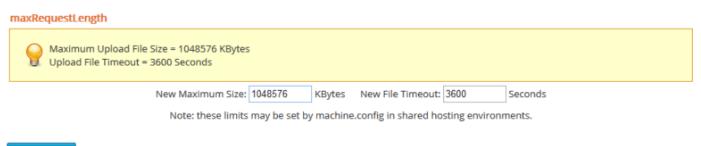
<addname="ChartImage_axd"verb="*"preCondition="integratedMode"path="ChartImage.axd"type="T

   </handlers>

</system.webServer>

maxRequestLength: This feature allows you to change the maximum file size that can be uploaded and its timeout settings.

- Enter a number (in KBytes) for a **New Maximum Size** for upload files in the field provided.
- Enter a number (in seconds) in the **New File Timeout** field to regulate the amount of time that can pass before the operation times out.

Some shared web hosts do not allow applications to update the web.config file programmatically. In this case, you will need to make the edits to web.config manually.

web.config

Make the following update:

<httpRuntime useFullyQualifiedRedirectUrl="true" maxRequestLength="102400"

executionTimeout="12000" requestLengthDiskThreshold="102400" />

LE Loader Path: Select whether to use the default LE Loader Path or the one indicated in SiteUrls.config file.

XHTML Compliance: Some older DNN installations have XHTML Compliance set to **Transitional**. This creates problems for Ajax utilization. XHTML Compliance should be set to **Mixed Mode**.

If you cannot set XHTML Compliance to **Mixed Mode** via the provided user interface, you will need to edit web.config manually. Since **Mixed Mode** is the default setting, you only need to delete or comment out the old setting:

web.config

Make the following update:

<!--<xhtmlConformance mode="Transitional" />-->

- Click **Return** to return to the top-level Configuration page.

Integration

Establishing Various LMS Digital Integrations
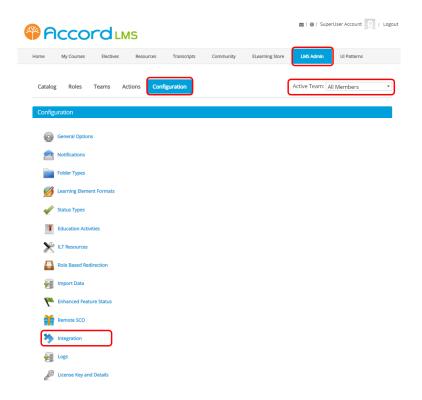
Establishing certain settings within the various integration sections will allow your Accord LMS to properly integrate with other online digital systems.

To access Integration features;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Select the **LMS Admin** tab.
- Select the **Configuration** tab.
- Select **Integration**.

Note; In order to access all features within Integration, it may be necessary to be logged-in using an Accord LMS Host account. This means that some of the Integration section headings you may observe in some of the images below may not be present on your particular Accord LMS version.

A Host-Account is only available for self-hosted clients and represents a small percentage of our client-types.

Once inside the Integration section you will see different panel headings which will allow for various types of LMS system integrations.

The number of panel headings and specific types of panel headings may vary depending on your particular LMS portal and/or the LMS User's authorized level of permissions.

Integration

API Web Services
OpenSesame Marketplace
Integrity Advocate Proctoring

Update   Return

API Web Services

In this section you can activate Accord LMS API's to connect your eLearning with other critical business applications.

If necessary, click on the API Web Services panel to open.

- **Enable Web Services:** Check box to enable API Web Services.
- After checking box click **Update**.

API Web Services
Enable Web Services: ⓘ ☐

OpenSesame Marketplace
Integrity Advocate Proctoring

Update   Return

OpenSesame Marketplace

In the OpenSesame Marketplace Panel;

- **Account Name:** Enter the Marketplace account name.
- **Account ID:** The Account ID field will auto-populate once the OpenSesame Marketplace is created.
- **Hide Marketplace:** Checking this box will prevent the OpenSesame panel heading from displaying on the Catalog Page. Leaving it unchecked will allow the OpenSesame panel heading on the Catalog Page to display near the bottom; allowing authorized LMS Admins the ability to access and add new OpenSesame courses.
- Click **Create**.
- After creating the OpenSesame Marketplace, scroll near bottom and click **Update**.

If the **Hide Marketplace** box is unchecked, after the OpenSesame Marketplace has been created, the OpenSesame panel heading will then display near the bottom of the Catalog Page, allowing online courses to be quickly added to your LMS Catalog.

Once OpenSesame courses are added to the Catalog they may be utilized by Learners.

Integrity Advocate Proctoring

Integrity Advocate is an authorized third-party utilized to enable online proctoring of various online Learner activity.

Integrity Advocate Proctoring ⌄

Live Proctoring for any of your Learning Elements
Accord LMS provides seamless integration with live proctoring provided by Integrity Advocate.
Proctoring is done remotely via a live feed from the Learner's web camera. When a proctored Learning Element is first Launched, the Learner must enable their web camera and present an ID, if required. The camera will then capture random images during the LE presentation or exam. The captured images are then reviewed by a remote live proctor for final validation of the LE completion and / or score. The validation is then returned to the LMS for tracking and reporting.

Enable Proctoring: ⓘ ☐

[Update] [Return]

If choosing to allow LMS proctoring provided through Integrity Advocate;

- If necessary, click on the **Integrity Advocate** heading to open.
- Check box for **Enable Proctoring**.

The page will then refresh, displaying additional data fields.

- **Application ID:** Copy and paste your Integrity Advocate application ID into this field. This information will be provided to you by Accord LMS Staff.
- **API2 Key:** Copy and paste your Integrity Advocate API2 Key into this field. This information will be provided to you by Accord LMS Staff.
- **Test Connection:** Click on the Test Connection button to verify a valid connection.
- **Update:** After entering the above information and testing for a valid connection, scroll near bottom and click Update.

If a valid connection verified, your Accord LMS system will now accommodate online proctoring facilitated thru Integrity Advocate.

Integrity Advocate Proctoring

Live Proctoring for any of your Learning Elements

Accord LMS provides seamless integration with live proctoring provided by Integrity Advocate.

Proctoring is done remotely via a live feed from the Learner's web camera. When a proctored Learning Element is first Launched, the Learner must enable their web camera and present an ID, if required. The camera will then capture random images during the LE presentation or exam. The captured images are then reviewed by a remote live proctor for final validation of the LE completion and / or score. The validation is then returned to the LMS for tracking and reporting.

Enable Proctoring: ☑

Application ID: [   ]

API2 Key: [   ]

Test Connection

Update   Return

Further Information on Proctoring

For more comprehensive information regarding online proctoring for LMS Learner activity, please see; Proctoring

LMS Logs

Logs

Various log files may be accessed and documented in a log report.
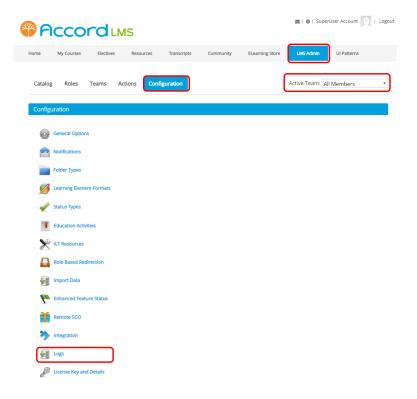
Types of log files may include; Http Requests Logs, Access Code Logs, Attempt Delete Logs, Enrollment Logs or Notification Logs.

To access Logs;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Select the **LMS Admin** tab.
- Select the **Configuration** tab.
- Once in the Configuration panel, select **Logs**.

Note; In order to access Logs, it may be necessary to be logged-in using an Accord LMS Host account. Some of the Log section headings you may observe in some of the images below may not be present on your particular Accord LMS version.

A Host-Account is only available for self-hosted clients and represents a small percentage of our client-types.

The Logs page will display, allowing an LMS Admin to peruse and document various types of log activity.

Click on any heading to open it's respective panel.

Logs

Http Requests Logs	❯
Access Code Logs	❯
Attempt Delete Logs	❯
Enrollment Logs	❯
Notification Logs	❯

If desiring further assistance relating to the various forms of Logs, please contact your Accord LMS salesperson or Accord LMS Support.

Email Templates

The **Email Templates** section is where you can customize all the email notifications sent from the LMS, to either Learners or LMS Administrators.

You can provide your own template or use a default email template to build a notification which best suits your organization.

Include as many Tokens as needed in order to populate emails with dynamic and accurate information.

To access Email Templates;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- From the Configuration panel, click on **Notifications**.

Once in the Notifications section;

- Click on the **Email Templates** heading to open this section.
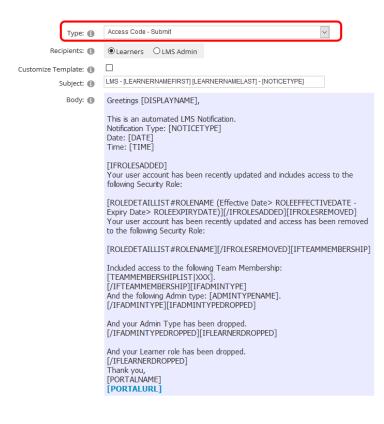
- **Language:** Select the language for which the notification will be used. This will be based on the preferred locale selected for each user.
- **Type:** Select an email notification type from the list, (detailed below). You can choose between Default templates or Custom templates.
- **Recipients:** Select the templates for each recipient type, Learners, LMS Administrators or Instructors.
- **Customize Template:** Checking this option will bring up the editor to customize the templates to use in the LMS notifications.
- **Subject:** Type the subject text, including **tokens** that will be used to pull the required data from the LMS to auto-fill the email notification's subject line.
- **Body:** Type the body text, including **tokens** that will be used to pull the required data from the LMS to auto-fill the body of the email notification.

Email Template Type: **Access Code – Submit**

This will send notifications any time an Access Code is used (*from the form in Learner Access Tab or HTTP Calls from other sources, Bulk Role Assignment, Bulk Learner Import*).

Recipients: Learners or LMS Administrators.

Email Template Type: **Access Code Expiration**

This will send notifications regarding the Expiration date of an Access Code, if it exists.

- Will only be sent to LMS Administrators.

Type: ⓘ | Access Code Expiration ⌄

Customize Template: ⓘ ☐

Subject: ⓘ | LMS - [NOTICETYPE]

Body: ⓘ

Greetings LMS Admin,

This is an automated LMS Notification.
Notification Type: [NOTICETYPE]
Date: [DATE]

Access Code ([ACCESSCODENAME]) will Expire in
[ACCESSCODEEXPIRATIONDATE].

More information on your Access Code can be found by visiting the LMS Admin module on your LMS Portal. Proceed to LMS Admin > Team, then Team Access Code.

Thank you,
[PORTALNAME]
[PORTALURL]

ⓘ *This Notification is based on Expiration Thresholds so that you may choose a specific time before expiration for notifications to be sent. For instructions on how to set expiration dates go to > **LMS Admin Guide > Teams > Team Access Codes > Utilization and Expiration.***

Email Template Type: **Access Code Utilization**

This will send notifications regarding utilization and limit warnings of Access Codes.

- Will only be sent to LMS Administrators.

Email Template Type: **Bulk Learner Import**

This will send notifications containing detailed information when Learners are Bulk Imported into the LMS, (It is triggered from the **'Bulk Learner Import'** section).

- **Recipients:** Learners or LMS Administrators.

Email Template Type: **Bulk Learning Role Assignment - Assign New Roles.**

This will send notifications regarding adding and revoking Security Roles and Team Memberships.

- Will only be sent to LMS Administrators.
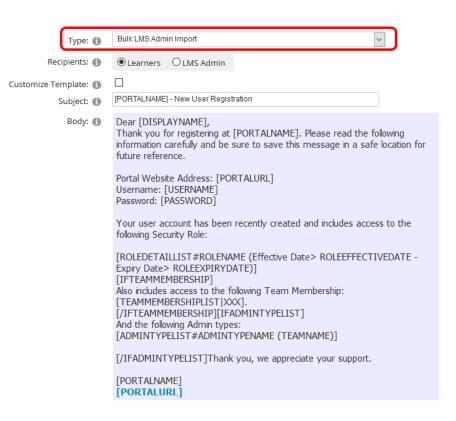
Email Template Type: **Bulk LMS Admin Import.**

This will send notifications when a user is imported as an LMS Administrator.

- Will only be sent to LMS Administrators.
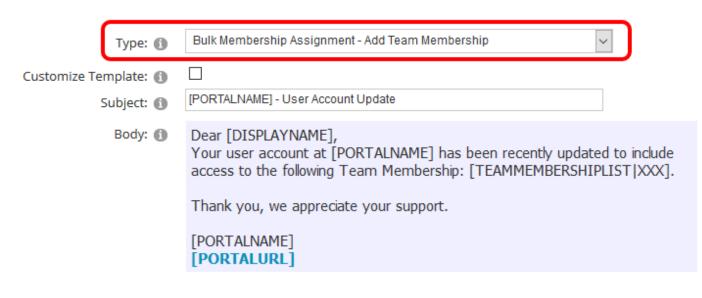
Email Template Type: **Bulk Membership Assignment - Add Team Membership.**

This will send notifications of Team Memberships Added while using **Bulk Learner Assignment.**

- Will only be sent to LMS Administrators.

Email Template Type: **Bulk Membership Assignment - Delete Team Membership**

This will send notifications of Team Membership Dropped while using **Bulk Learner Assignment.**

- Will only be sent to LMS Administrators.

Email Template Type: **Comments from Learner.**

This will send notifications when Learners leave Comments while utilizing a Learning Element.

- **Recipients:** Learners or LMS Administrators.

Email Template Type: **Conditions Satisfied**

This will send notifications when defined Conditions have been satisfied for a given Learning Element (triggered by Attempt Creation even with attempts created by LMS Administrators).

- **Recipients:** Learners or LMS Administrators.

Email Template Type: **Due Date - Final Notice**

Will send third notice of Learning Role Due/Expiration Date.

- **Recipients:** Learners or LMS Administrators.

Email Template Type: **Due Date - First Notice.**

Will send first notice of Learning Role Due/Expiration Date.

- **Recipients:** Learners or LMS Administrators.
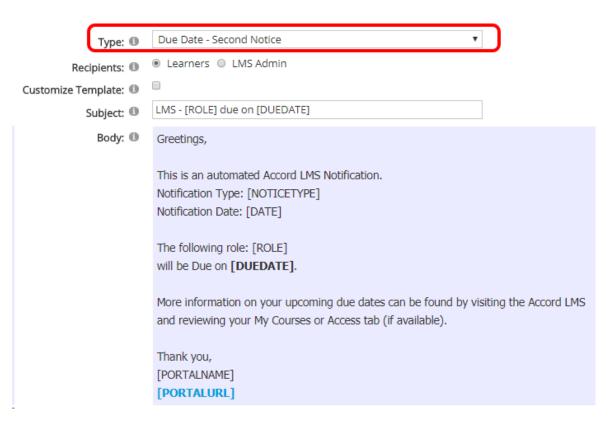
Email Template Type: **Due Date - Second Notice.**

Will send second notice of Learning Role Due/Expiration Date.

- **Recipients:** Learners or LMS Administrators.

Email Template Type: **Learner Count - Limit Warning.**

This will send notifications when the Site Learner Count is about to reach the maximum amount as determined by your License (Threshold based).

- Will only be sent to LMS Administrators.

Email Template Type: **Learning Element - Admin Enrollment.**

This will send notifications of Learning Element Enrollment/Drop performed by an LMS Administrator.

- **Recipients:** Learners or LMS Administrators.

Email Template Type: **Learning Element - Learner Attempt.**

This will send notifications of a Learning Element Attempt performed by a Learner.

- **Recipients:** Learners or LMS Administrators.

Email Template Type: **Learning Element - Learner Enrollment.**

This will send notifications of a Learning Element Enrollment/Drop performed by a Learner.

- **Recipients:** Learner or LMS Administrators.

Email Template Type: **Maintenance Expiration**

This will send notifications that the Site License or Maintenance will Expire, (based on threshold).

- Will be sent to LMS Administrators Only.

Email Template Type: **Report - Scheduled Delivery.**

This will send notifications regarding the Scheduled Delivery of Reports.

- Will be sent to LMS Administrators Only.

Email Template Type: **Session - Delete.**

This will send notifications regarding a Deletion of an ILT/VILT Session.

- **Recipients:** Learners or Instructor.

Email Template Type: **Session - Registration Status Update.**

Will send notifications when Waitlisted/Unwaitlisted Learner has Registered/Unregistered from a ILT/VILT Session.

- **Recipients:** Learners or LMS Administrators or Instructor.

Email Template Type: **Session - Update.**

Will send notifications of ILT/VILT Session Updates.

- **Recipients:** Learners or Instructor.

Email Template Type: **Start Date - Final Notice.**

Will send third and last notice of a Learning Role Start/Begin Date.

- **Recipients:** Learners or LMS Administrators.

Email Template Type: **Start Date - First Notice.**

Will send first notice of a Learning Role Start/Begin Date.

- **Recipients:** Learners or LMS Administrators.
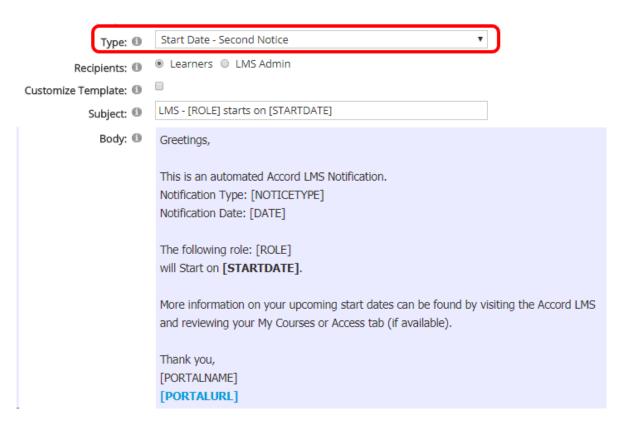
Email Template Type: **Start Date - Second Notice.**

Will send second notice of a Learning Role Start/Begin Date.

- **Recipients:** Learners or LMS Administrators.

Available Tokens

Use the list of tokens when customizing the email notifications. Each of the tokens contains additional instructions where required.

- Click **View** next to Available Tokens to expand the full list.

General

[NOTICETYPE] - *The Name/Type of the Notification*

[PORTALNAME] - *The Name of the Portal from were the Notification was sent*

[PORTALURL] - *The URL of the Portal from where the Notification was sent*

[CLIENTPORTALLINKLIST:XXX] - *A detail list of links to the Client Portals. Please note that XXX is used as a separator between each item in the list*

[DATE] - *The Current Date when the Notification was sent*

[TIME] - *The Current Time when the Notification was sent*

Learning Element - General

[LETITLE] - *Title of the Learning Element*

[LETYPE] - *Learning Element Type*

[IFMANAGER] [/IFMANAGER] - *If the email is being sent to an Admin*

[IFLEARNER] [/IFLEARNER] - *If the email is being sent to a Learner*

[LEARNERNAMEFIRST] - *Learner First Name*

[LEARNERNAMELAST] - *Learner Last Name*

[USERNAME] - *Username*

[EMAIL] - *Email Address*

[DESCRIPTIONLE] - *Learning Element Description*

Learning Element – Sessions

[SESSIONNAME] - *Name of the ILT/VILT Session*

[SESSIONSTARTDATE] - *ILT/VILT Session Start Date*

[SESSIONUPDATEREASON] - *Session Update Reason information that is filled in the Session's detail*

[DESCRIPTIONLE] - *The LE description*

[DESCRIPTIONSESSION - *Description of the ILT/VILT Session Learning Element*

[WEBINARURL] - *URL to the Webinar*

[IFVIRTUAL][/IFVIRTUAL] - *The information contained between the Tokens will be sent only if the Session is Virtual*

[IFNOTVIRTUAL][/IFNOTVIRTUAL] - *The information contained between the Tokens will be sent only if the Session is Not Virtual*

Learning Element – Sessions Registration

[ISREGISTERED][/ISREGISTERED] - The information included between the Tokens will be sent when a Learner is Registered to a Session

[ISUNREGISTERED][/ISUNREGISTERED] - The information included between the Tokens will be sent when a Learner is Unregistered to a Session

Learning Element – (Learner and LMS Admin) Enroll/Drop

[ISENROLL][/ISENROLL] - *If the action is an enrollment, the text between the tags will be included in the email*

[IFHASSESSIONS][/IFHASSESSIONS] - *If the LE is an ILT and it has sessions, the text between the tags will be included in the email*

[ISDROP][/ISDROP] - *If the action is a drop, the text between the tags will be included in the email*

[FOLDERLIST|XXX]- *List of Folders that were Enrolled or Dropped. XXX will limit folders, this token will be replaced with Folder Names separated by a new line*

[LELIST|XXX] - *List of Learning Elements that were Enrolled or Dropped. XXX will limit LE, this token will be replaced with LE Names separated by a comma ", "*

[SESSIONLIST|XXX] - *List of Sessions that were Enrolled or Dropped. XXX will limit Session, this token will be replaced with Session Names separated by a comma ", "*

[ROLELIST|XXX] - *List of Roles that were Enrolled or Dropped. XXX will limit roles, this token will be replaced with Role Names separated by a comma ", "*

[LEARNERLIST|XXX] - *List of Learners that were Enrolled or Dropped. XXX will limit learners, this token will be replaced with learner "NameFirst NameLast" separated by a comma ", "*

Learning Element – Attempt, Learner Comments and Conditions Satisfied

[FOLDERPATH] - *Indicates the Complete Folder Path were the affected Learning Element is located (ParentFolder > ChildFolder > GrandChildFolder)*

[FOLDERNAME] - *Provides the Folder Name were the affected Learning Element is located*

[COMPLETION] - *Gives information about the Completion Status of the Learning Element*

[SUCCESS] - *Indicates the Success Status (Passed, Failed, Not Attempted) of the Learning Element*

[STATUS] - *Gives information about the Status (Completed, In Progress, Not Attempted) of the Learning Element*

[IFLEARNERATTEMPT] [/IFLEARNERATTEMPT] - *The information included between this Tokens will be sent only if aa Leaner has Attempted the Learning Element*

[COMMENTLIST] - *Displays a list of Learner's Comments*

[ATTEMPTSTOTAL] - *Displays the Attempts Totals*

[DURATIONESTIMATED] - *Learning Element Estimated Duration*

[DURATIONACTUAL] - *Learning Element Actual Duration*

[LEARNERMODURL] – *Link to Learner module (simple URL - must compose anchor tag). Note: Only available for Attempts Notifications generated from the Learner's Catalog*

[IFNOTQUIZ] [/IFNOTQUIZ] - *The information between this Tokens is shown only when Learning Element Type is Not a Quiz*

[IFQUIZ] [/IFQUIZ] – *The information between this Tokens is shown only when Learning Element Type IS a Quiz or Survey*

[LINKSCORERESULTS] – *Link to reports for Admin that shows specific Learner Score Details or LearnerMod/BookMod results if Learner*

[SCORE] - *Shows the Score obtained in a Quiz or Survey*

[PASSINGSCORE] - *Shows the Passing Score required by the Quiz or Survey*

[STATUS] - *Shows the Status of the Quiz*

[UNITS:XXX] - *Displays the number of Education Units this Quiz Awards. XXX is the number of decimal characters*

[UNITSAWARDED:XXX] - *Displays the number of Education Units awarded by this quiz. XXX is the number of decimal characters*

Learning Element – Conditions Satisfied

[CONDITIONLIST] - *Lists the Learning Element Conditions Satisfied*

Role Start/Due Date

[ROLE] - *Shows the Role Name*

[STARTDATE] - *Displays the Role Start Date*

[DUEDATE] - *Displays the Role Due Date*

Learner Limit Warning

[LEARNERLIMIT] – *License Learner Limit has been reached*

[LEARNERCOUNT] – *Total amount of Learners*

[MAINTENANCEDATE] - *Maintenance expiration date*

[LIMITWARNING] - *Limit Warning token replacement examples: "150 Total" or "90%" or "7 Days" (for License Expiration)*

Access Code - Submit

[ACCESSCODE] – *Access Code*

[ACCESSCODENAME] – *Access Code Long Name*

[ACCESSCODEDESCRIPTION] - *Access Code Description*

General Bulk Users Import (Both Learner and Admin)

[DISPLAYNAME] – *User Display Name*

[ROLEDETAILLIST#XXX] - *List of Role Details. XXX will define the roles template, this template will be replaced with special tokens (tokens without the characters '[' and ']'). For example: "[ROLEDETAILLIST#ROLENAME (Effective Date> ROLEEFFECTIVEDATE - Expiry Date> ROLEEXPIRYDATE)]"*

ROLENAME - *Role Name*

ROLEEFFECTIVEDATE - *Role Effective Date*

ROLEEXPIRYDATE - *Role Expiration Date*

Note: Due to a bug in the way DNN replaces tokens, if you use a colon in your token template, the whole token will disappear. Please do not use colons (:) in your list template

Bulk Learner Import - Register New User

[PASSWORD] – *User Password*

[IFTEAMMEMBERSHIP][/IFTEAMMEMBERSHIP] - *Content between these Tokens will be shown only if Team Membership is present*

[TEAMMEMBERSHIPLIST|XXX]- *XXX will limit teams memberships, this token will be replaced with Team Membership name separated by a comma ", "*
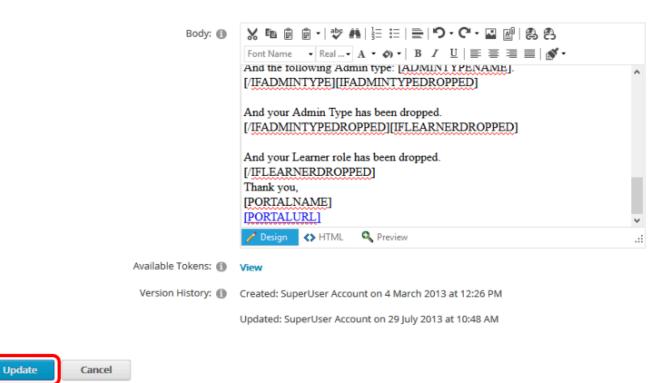
Report - Scheduled Delivery

[REPORTTYPE] – *Report Type*

[REPORTFILE] - *Report File Name*

[REPORTTEAM] - *Report Team Name*

[REPORTDEFINITION] - *Report Definition Name*

[REPORTDELIVERY] - *Report Delivery Name*

[REPORTNEXTDELIVERYDATE] - *Next Delivery Date*

[REPORTNEXTDELIVERYTIME] - *Next Delivery Time*

[REPORTDATE] - *Report Date*

[REPORTTIME] - *Report Time*

- Click **Update** to save changes or **Cancel** to return to the top level Configuration page.

OpenSesame - Configuration

Configuring Your Accord LMS OpenSesame Marketplace

The **OpenSesame** integration panel will allow you to configure your Accord LMS so that administrators can easily access the **OpenSesame Marketplace** to quickly add new training content to your Accord LMS learning Catalog.

This will provide near-immediate access to various selected training courses for your organization.

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on **Configuration**.
- Once the page refreshes inside the Configuration Page, click on **Integration**.

Configure the OpenSesame Marketplace

If necessary, click on the OpenSesame Marketplace heading to open it's panel.

In the OpenSesame Marketplace Panel;

- **Account Name:** Enter the Marketplace account name.

- **Account ID:** The Account ID field will auto-populate once the OpenSesame Marketplace is created.
- **Hide Marketplace:** Checking this box will prevent the OpenSesame panel heading from displaying on the Catalog Page. Leaving it unchecked will allow the OpenSesame panel heading on the Catalog Page to display near the bottom; allowing authorized LMS Admins the ability to access and add OpenSesame courses.
- Click **Create**.
- After creating the OpenSesame Marketplace, scroll near bottom and click **Update**.

If the **Hide Marketplace** box is unchecked, after the OpenSesame Marketplace has been created, the OpenSesame panel heading will then display near the bottom of the Catalog Page, allowing online courses to be quickly added to your LMS Catalog.

Once OpenSesame courses are added to the Catalog they may be utilized by Learners.

To Access OpenSesame

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- Click on **OpenSesame**.

For information on using the OpenSesame Marketplace to quickly add learning content to your Accord LMS Catalog, please reference; [OpenSesame - The Learning Marketplace](#)

Check and/or Update License Key and Details

License Key and Details: This contains technical information related to your module concerning its **domain, server, content, license status and license key.**

To access License Key and Details;

- Ensure the proper **Active Team** is selected by using the associated dropdown menu; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- Click on **License Key and Details.**

- **Module Information:** This includes the module name, version, DNN version, .Net Framework, Permissions, and ASP.NET identity details.
- **Current Domain:** The current domain on which the Accord LMS is hosted.
- **Codebase Signature:** The signature information for the server hosting domain on which the LMS resides.
- **Current Utilization:** Resource utilization, Web File and SQL storage.
- **Current Counters:** Displays the current number of Learning Elements and Learners within the LMS.
- **License Details:** Displays information related to the Accord LMS license agreement. You can click the **Request License Assistance** link to email Accord LMS Support with any license questions.
- **License Key:** Displays the license key information.

- Click/Tap **Update** or **Return** to return to the top-level Configuration page.

Update License Key

- Login as **Host.**
- Use same steps as above to access your **License Details.**
- **Copy and Post** your new license key into the field provided.
- Click **Update.**

> ℹ **Most of the Configuration information should already be set up for you in the LMS Admin Module. An LMS Admin should not need to make any modifications.**

> 💡 You can click the **Request License Assistance** link to email Accord LMS Support with any license questions.

License Notifications

In this section you can control and select how to be notified when your license counters reach their limits. You can review these figures in the License Key and Details section.

To access License Notifications;

- Ensure the proper larger **Active Team** is selected by using the associated dropdown menu; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- From the Configuration Panel, click on **Notifications**.

Once the Notifications Panel opens;

- Click on the **License Notifications** heading to open this section.

- **Learner Count Limit:** This is the number of Learners determined by the terms of your license (set in Configuration > License Key and Details).
- **Learner Thresholds:** Select the Learner limit warnings you want to receive (by Level), by entering a number for Value and selecting the value's Type (Total or %). If there are no values entered (or if the value is zero), no warning will be sent.
- **License Expiration:** This is the expiration date set by the terms of your license (set in Configuration > License Key and Details).
- **Maintenance Expiration:** This is the expiration date set by the terms of your license (set in Configuration > License Key and Details).
- **Expiration Notifications:** Select the limit warnings you want to receive (by Level), by entering a number for the Value and then select the Value's Type (Days, Weeks, Months, Years). If there are no values entered (or if the value is zero), no warning will be sent. These notifications will be sent for either pending License (Subscription) Expiration or Maintenance (Perpetual) Expiration.
- **Email Addresses:** Type in the list of email addresses to notify in the field provided separated by commas.

License Notifications

Learner Count Limit: ⓘ Unlimited

Learner Thresholds: ⓘ

Level	Value	Type		
Final Notice	100	○ Total	◉ %
Second Notice	90	○ Total	◉ %
First Notice	75	○ Total	◉ %

License Expiration: ⓘ No expiration

Maintenance Expiration: ⓘ No expiration

Expiration Notifications: ⓘ

Level	Value	Type
Final Notice	0	Days
Second Notice	7	Days
First Notice	30	Days

Email Addresses: ⓘ demo.test@accordlms.com

Gamification

Gamification - Introduction

Gamification is a great way to take your training program to a new level of Learner satisfaction. People typically take training only when it is required. When completed nothing happens except that they get a green check mark and no longer receive email notification warnings. Gamification changes this by rewarding accomplishments with badges, positive feedback, and peer recognition. Studies have conclusively shown that Gamification encourages Learners to more fully utilize their training resources.

Additional Resources:

- Online video tutorial "Learner & Admin - Gamification" available in [Accord LMS Video Tutorials](#) section.

Learner Experience - Earning Points and Badges

Education Activity Points

You can create any type or number of Education Activities for your training material.

Learners earn Activity Points by successfully completing Learning Elements that have been associated with Points.

Learning Elements (LE) will have their associated Activities and Points listed within their **details.**

Learner's may access these details from **My Courses** or **Electives**.

Once the LE is completed the points are awarded.

Activity points are then used for Badges and Leaderboards.

Badges

Badges are recognition for a given competency.

Systematically speaking, a Badge is a visual award for accumulating the type and number of Activity Points required to earn a particular Badge.

Badges are normally used to indicate that a specific certification has been met, a competency has been earned or that the Learner has completed a certain task worthy of acknowledgment.

When a given Learner completes the assigned training necessary to earn a specific number of points required for a certain badge, a Badge 'toast' notification will popup in the top right corner of their screen.

LMS Education Activities

Administrators are responsible for configuring the Accord LMS with the necessary Education Activities, Activity Points and Badges to enable any Accord gaming features.

Education Activities

The first step is to create Education Activities appropriate for your training content.

Each Education Activity will automatically create a Gaming Activity of the same name that can be used to award Badges.

Gaming Activity and Badge management are discussed in the next section.

To create an Education Activity;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Configuration** tab.
- Click on **Education Activities.**

- Click on **Add New Education Activity.**

- **Name:** Enter the name of the Education Activity.
- **Status:** Select if the Education Activity will be **Active** or **Inactive**.
- **Gaming Activity:** Select if this Education Activity will create a Gaming Activity which will have the exact same name.
- **Description:** Add a description if desired.
- Click **Update** to save.

Management of Education Activities

Any LE can award Education Activities based upon your selected criteria.

To manage Education Activities;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Click on the **LMS Admin** tab.
- Click on the **Catalog** tab.
- Click on the Learning Element you wish to manage the Education Activities for to open it's context menu.

- From the menu click on **LE Details**.

In the LE Details panel, scroll down and click on the **Education Activities** heading to open this section if necessary.

Award Requirements will determine the requirements necessary for any Learners to receive the designated award for this particular Learning Element.

From the **Award Requirements** dropdown menu, you can select from **Complete**, **Pass**, **Complete or Pass**, or **Complete and Pass**.

In the field next to the Title of the Education Activity;

- Enter the number of points you wish to award for this Educational Activity.
- Click **Update.**

Should you choose to change this value at some point in the future, simply repeat the steps above to re-enter the Education Activities panel, change the value in the field and click **Update**.

Editing Points for any Education Activities Already Awarded for a given ILT Session

Should you desire to edit the points already awarded for an Education Activity for a given ILT session (Instructor Led Training), please follow these steps;

• Go to the ILT session you wish to edit the points for and right click on it. A context menu will display.
• Select **Session Roster**.

This will bring up the Session Roster.

• Under **Points** click on **View.**

This will bring up the current points awarded for any completed Education Activities.

- Edit points as necessary.
- Click **Update** to save changes.

Any edits will now reflect under this User's Education Activities accrued points.

Education Activities

Points

APA: ⓘ 5

ASWB: 5

NASW: 5

Update   Cancel

Gamification Mechanics

The Gamification management module allows you to review which Activities have been created by the system.

You can also create new badges and assign points and Badges to users directly without having to make them complete any courses.

To manage Gamification or add or change Badges;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Wave your mouse over the **LMS Admin** tab.
- Click on **Gaming**.

Activity Points

When an Education Activity is created in the LMS, as long as the Gaming Activity box is checked, a Gaming Activity with the same name is created simultaneously.

For LMS activities **it is important** to leave the Activity Points to their default value of 1.

Should you choose to change the number of Activity points you can click on the pencil icon in the Actions column adjacent to the Learning Activity.
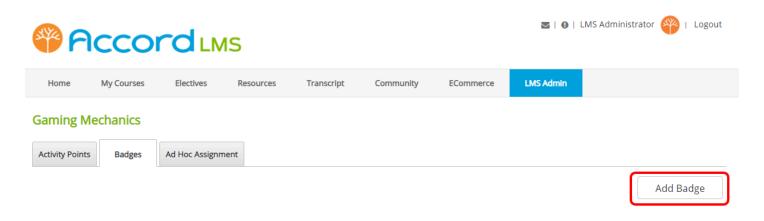
Badges

Once you have created the Education Activities and corresponding Gaming Activities, you are ready to set up a **Badge**.

The **Badges** tab allows LMS Admin to create and setup award badges that will be granted to Learners when a certification has been met or a competency earned.

To create a new badge;

• Click the **Add Badge** button.

• **Name**: Enter a name for the Badge (non-optional).
• **Description**: Enter a description for the Badge (optional).
• **Expiration Period**: Enter the number of days, months, or years when the Badge should expire. Click on **reset selection** to leave blank and have no expiration.

- You may use the dropdown menus to select from a variety of badge options which presently exist within the LMS or use the **Upload File** button to upload a Badge image of your choosing from your computer system.
- Select the **Activities** and enter required points in the Points field.
- Click the **Add** button.
- Click **Save.**

The new Badge will display in the list as shown in the example below.

Ad Hoc Assignment

You can also assign badges and points to a user by going to the **Ad Hoc Assignment** tab.

Gaming Mechanics

Activity Points | **Badges** | **Ad Hoc Assignment**

Add Badge

Image	Badge Name		
	Effective Communicator	✎	🗑
	LMS Admin Master	✎	🗑
	LMS Learner Master	✎	🗑

- **Search** the user that you want to add points to.
- Click on the **edit icon** to the right to open the Edit Activity UI.

Gaming Mechanics

Activity Points | **Badges** | **Ad Hoc Assignment**

Pdavidson | Search for Username

Profile Photo	Username	Activity Points	
	Pdavidson	10	✎

- Enter a number of **Activity Points** you want to assign.
- Select a **badge** from the drop-down.
- Click the **Add** button.

Activity Points ⓘ	10			

Current User Badges ⓘ	Image	Name	Awarded (UTC)	Expire (UTC)	
	⭐	LMS Learner Master	16/06/2016 16:05		🗑

Effective Communicator ▾

Add

Save Cancel

• Click **Save** to confirm the **Ad Hoc Assignment**.

Activity Points ⓘ	10			

Current User Badges ⓘ	Image	Name	Awarded (UTC)	Expire (UTC)	
	🏛	Effective Communicator	22/06/2016 20:23		🗑
	⭐	LMS Learner Master	16/06/2016 16:05		🗑

LMS Admin Master ▾

Add

Save Cancel

Gamification Leaderboard

Overview

Leaderboard modules allow you to display the current Point and Badge standing of a group of users. The Leaderboard can be site wide or filtered to specific groups of Learners. Leaderboards sort from top to bottom by activity point accumulation and will also display badges earned. Leaderboards are useful for Learners so that they might see how their achievements compare against others within a similar Team or Group.

Module Settings

- **Template Directory:** is the presentation template the leaderboard will use to show its content. This folder can be found in /DesktopModules/DNNGamification/Templates/ Leaderboard. Each folder being a different template. You can create and add any number of templates by copying one of the existing ones with a new name and modifying it as you might need.
- **Mode:** Select the mode the leaderboard will display. This setting manages what users the leaderboard will show, for example, the current user's friends, all the users in the system, a particular user group's participants, etc.
- **Show Paging:** Check the box if you want the paging controls to be displayed.
- **Page Size:** Enter the page size. This setting regulates the amount of users the leaderboard will show. For example, if you only want to show five users, input 5 in the Page size field. If you want to show all the users but in groups of eight, input 8 in the Page Size field and enable the Show Paging checkbox, this will create a leaderboard that shows it's users in groups of eight.

Placement: Community > My Groups

Module Settings

- **Template Directory:** Use the dropdown to select the **LMS Narrow** directory.
- **Mode:** Select **All Users** as the mode the leaderboard will display.
- **Show Paging: Uncheck** the box to hide the paging controls.
- **Page Size:** Enter **10** as the page size value.
- Click **Update** to save your changes.

Learner View

Learners are able to view the Groups they belong to as well as a Leaderboard with all Learners in the community.

Placement: Community > My Groups > Group > Members

Module Settings

- **Template Directory:** Select **LMS.Profile** from the dropdown.
- **Show Chart: Check** this box to display the chart.
- Click **Update** to save your changes.

Learner View

When Learners drill down into a specific Group, on the Group > Members page a Leaderboard is also presented but only lists the Learners in that group. This display includes both Activity Point totals and Badges.

Placement: Profile > Friends

Module Settings

- **Template Directory:** Select the **LMS.Wide** directory.
- **Mode:** Select **Friends Profile**.
- **Show Paging: Uncheck** this box.
- **Page Size:** Enter **5** as the page size so only 5 users are shown.
- Click **Update**.

Learner View

Gamification Profile

Overview

By clicking on the Learner' display name in the top right corner of the LMS, the Learner can access some more detailed information about his/her overall progress.

Module Settings

- **Template Directory:** is the presentation template the Profile will use to show its content. You can create and add any number of templates by copying one of the existing ones with a new name and modifying it as you might need.
- **Show Chart:** check this box if you want the chart to be displayed.

Placement: Profile

Module Settings

- **Template Directory:** Configure this to use the LMS.Profile template.
- **Show Chart: Check** this box.
- Click **Update** to save your changes.

Learner View

This section allow learners to review their activity points and badges achievment. By clicking on the Learner's display name in the top right corner of the LMS, the Learner can review his/her activity point accumulation and badge achievements.

Placement: Transcript

Module Settings

- **Template Directory:** Configure it to use the LMS.Transcript template.
- **Show Chart: Uncheck** this box.
- Click **Update** to save your changes.

Learner View

The Profile module in the Transcript page will only show the badges that the user has assigned.

Refresh

Drag a column header and drop it here to group by that column.

User Name	Folder Name	Completion	Success	Due Date	Score	Ed. Units	LE Details
		All	All				
Paul G	LMS Admin Training	In Progress	Passed			0	View

Page Size: 50

1 items in 1 pages

Refresh

Badges

LMS Admin Master   Effective Communicator

The Learner Module

Learner Module - Introduction

The Learner Module allows you to configure the overall Learner presentation.

This is accomplished through the **Configuration** tab.
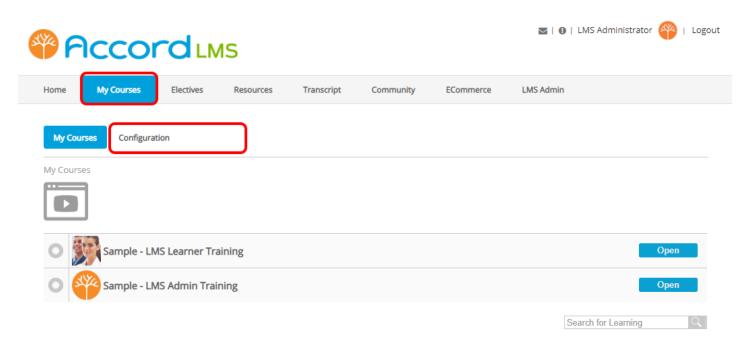
The **Configuration** tab will be visible in the Learner Module (**My Courses**) as long as the current Active Team has permission to access.

Configuration will allow you to:

- Specify which tabs (Dashboard, My Courses, Calendar, Resources, Transcript, Catalog, Access, etc) are displayed to your Learners.
- Select which and how various Learning Roles will display.
- Select which Learning Roles will have access.
- Set Access Codes.
- Decide which utilization reports your Learners can access.
- Select to show or hide various features such as LE descriptions, etc.

To edit or alter you Learner Presentation;

- Click on the **LMS Admin** tab.
- Click on the **My Courses** tab.
- Once in the My Courses section, slick on the **Configuration** tab.

This will take you to the Configuration panel where you may affect the Learner Presentation.

Home | My Courses | Electives | Resources | Transcript | Community | ECommerce | LMS Admin

My Courses | Configuration

General Settings ⌄

Learner Module ID: ⓘ	505
Tab ID: ⓘ	73
Admin Module: ⓘ	LMS Admin -> LMS (503) ▾
Parent Folder: ⓘ	< Show All Folders > ▾
Maximum Depth: ⓘ	
Show Tab Bar: ⓘ	☐
Available Tabs: ⓘ	☐ Dashboard
	☑ My Courses
	☑ Hide Expired Content
	☐ Hide LE or Folder if prerequisite is not met
	☐ Include Resources
	☐ Include Unenrolled Content
	☐ Resources Quicklink
	☐ Calendar
	☐ Electives
	☐ Resources
	☐ Transcript
	☐ Access
Maintain Drill Down State: ⓘ	☐
GoToWebinar / GoToTraining Trace: ⓘ	☐
Attempts: ⓘ	Best ▾
Show Active Team: ⓘ	☐
Show Active Learner: ⓘ	☐
Learner Module Refresh: ⓘ	◉ This Module ☐ All Modules ☐ Entire Page
Back Button Support: ⓘ	☐
Use Popup For Mobile: ⓘ	☑
Access and Tracking: ⓘ	◉ Current User
	☐ Proxy User
	Proxy User Name:
Interval (in seconds) to send extra commits:	60

Calendar	❯
Electives	❯
Transcript	❯
Access	❯
Templates	❯

Version History: ⓘ   Created: SuperUser Account on 22 January 2018 at 3:21:35 PM

Update

Copyright 2017 Accord LMS

General Settings

To access General Settings for the Learner Module;

- Click on the **LMS Admin** tab.
- Click on the **My Courses** tab.
- While on the My Courses tab, click on the **Configuration** tab.
- **General Settings** will be on the top.

General Settings

Learner Module: This is the module ID for this Learning Module.

Tab ID: This is the tab ID for this Learning Module.

Admin Module: Select the specific LMS Admin Module to select which catalog will be the source of the Learning Elements for your Learners.

This selected LMS Admin Module will track your Learner's attempts and provide your utilization reports.

If you happen to change the LMS Admin Module, the Learning Elements catalog will be disconnected but all the data and reports will still be available from the former LMS Admin Module.

Should ypu so choose, at some point you can revert back to the original LMS Admin Module and access the original Learner Catalog and Learner assignments.

Host accounts can attach the Learner module to any LMS Admin Module on the same DNN installation (codebase) even if on a different portal. A central LMS Admin Module Catalog repository can serve content to any number of client portals. This arrangement will facilitate your distribution channels and franchise networks.

Please note; all Accord LMS Modules will only operate within the specific domains allowed by your license.

Parent Folder: Select a folder from the list to use as a filter for the Learner Catalog.

Maximum Depth: Enter a number to determine how many levels (folder deep) to display in the Learner Catalog. Leave blank for unlimited.

Show Tab Bar: Select this option to Show or Hide the Learner Tab Bar.

• When selected, all enabled tabs are presented, even if only one tab is selected.
• If **not** selected, all tabs will be hidden, even if all tabs enabled.

Available Tabs: Select which tabs to display to your Learners.

Maintain Drill Down State: Maintain Folder Drill Down State between page visits. If not maintained, folders will reset each new page visit.

GoToWebinar / GoToTraining Trace: Create a trace of GoToWebinar / GoToTraining registrations.

Attempts: Use the associated dropdown menu to select the attempt status you want to display in **My Courses** and archive for the Learning Elements. The available option are; **Best**, **Last**, **Last Completed**, **First Completed**.

Show Active Team: Selecting this option will display the Active Team dropdown menu to the current user.

Show Active Learner: Display the **Active Learner** search box for LMS Admins with **Active Learner Selection** enabled. For more information please refer to the [LMS Admin Types](#) chapter of this guide.

Learner Module Refresh: Choose what refreshing actions will be taken as **Learner Module Refresh.**

Back Button Support: Select if Back button can be used to navigate to the previous folder. This Requires full page refresh when changing folders. It is suggested for Mobile use. It is not fully compatible with Modal Window.

Use Popup For Mobile: Use a pop-up window if the modal window size is larger than the browser window.

Access and Tracking: Select which User account will be used to determine access and tracking. These Conditions do not apply to Proxy Users.

• **Current User:** A current (logged in) user account determines what content is presented (depending on the Current User enrollment) and tracks all utilization to that user account. This requires the current user to be logged in.

- **Proxy User:** A Proxy user account determines what content is presented (depending on the Proxy User enrollment) and tracks all utilization to that proxy user account. This does NOT require the current user to be logged in. This setting is good for presenting sample courses or public surveys.
- **Proxy User Name:** Enter a valid Username ID to be used for access and tracking purposes.

Interval (in seconds) to send extra commits: Optionally specify an interval in seconds for sending a commit. Leave blank for no extra commits.

ℹ️ For more information on the **Proxy User** feature, please read our Blog article: [Learner Module – Anonymous Access](#).

Calendar

The Calendar section allows an LMS Admin to configure the Calendar tab for the Learner Module's presentation.

To Access Calendar;

- Click on the **LMS Admin** tab.
- Click on the **My Courses** tab.
- While in the My Courses tab, click on the **Configuration** tab.

Scroll down and click on the Calendar heading to open this section.

Learner Module: Use the associated dropdown menu to select which Learner Module the Calendar will redirect to.

Mode: Use the dropdown menu to select which Calendar components to present.

- **Calendar and List:** Selecting **Calendar and List** will display the **Calendar**, the **Today** button and the **List of selected dates**. This is typically used on a dedicated Calendar Tab or Page. Date selections from the Calendar will populate the List. It may also be used as a target from **Calendar Only**.
- **Calendar Only:** Shows only the Calendar control. Selecting **Calendar Only** will redirect to a specific Calendar with List. This can be useful to place as a widget anywhere on the site, such as the home page.

Maximum Height: Select the Maximum Height for the Calendar List. If the listed items exceed this height, a vertical scroll bar will be provided.

Number of Days: Select how many days, starting with today, which should be selected by default. Value can be from 0 to 50.
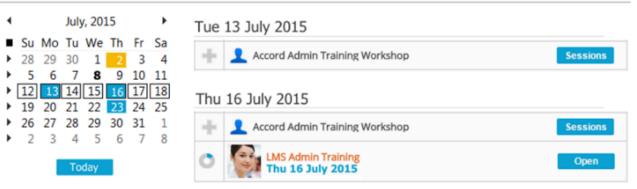
Features of Calendar and List;

- Completed Enrollment or Sessions are removed from the Calendar (no green dates).
- Not Started and In Progress (future) Due Dates are shown in blue.
- Past Due dates are shown in yellow. Past due Sessions are not shown regardless of Completion status.
- The Open button redirects to My Courses.
- The Sessions button redirects to My Courses.
- If no Redirection, Today will be shown by default when opening.
- If Redirected from a Calendar Only – the selection in both Calendar and List will be shown.

Typical Calendar and List Image.

Typical Calendar only image.

Electives

Generally speaking, Electives are courses or classes which a learner chooses to engage in, versus those courses which are assigned or required.

To manage the Learners' Electives feature;

- Click on the **LMS Admin** tab.
- Click on the **My Courses** tab.
- Once inside the My Courses tab, click on it's **Configuration** tab.

- Once in the Configuration tab, scroll down and click on the **Electives** heading to open this panel.

The Electives panel options are;

- **Learner Electives Enrollment:** checking the box for **Always Assign to Current User** will always assign Enrollment to the current user even if Access and Tracking is set to Proxy User.
- **Learner Electives Enrollment Redirection:** using the associated dropdown menu, select how the Learner will be redirected after they Enroll. Choices are **My Courses**, **URL** (A Link To An External Resource) or **Page** (A Page On Your Site).
- After selecting your options, scroll to the bottom of the page and click **Update**.

Transcripts

The Transcript panel within the Accord LMS Learner module is where the various options for recording and documenting Learners' Transcripts are managed.

To Access Transcripts;

- Click on the **LMS Admin** tab.
- Click on the **My Courses tab**.
- While in the My Courses tab, click on it's **Configuration** tab.

- Once in Configuration, scroll down to **Transcripts** and open it's panel by clicking on the heading.

Folder Status: Use the associated dropdown menu to select the type of Folder Status you want to include for top level Course reports.

You can select from **Current**, **Last Archived**, **All Archived** or **Current and All Archived**.

LE Attempts: Use the associated dropdown menu to select the type of Attempts to include within the report. You can include **All Attempts**, **Best Attempts**, **Last Attempts**, **Completed Attempts** or **First Completed Attempts**.

Role Status: Using the associated buttons, select the status of the Learning Roles you wish to include in the report.

You may select from **Pending Roles** (Pending Roles are those Roles which have been set to be active at some point in the future), **Active Roles** or **Expired Roles**.

Status: Select the status of the **Learning Elements (LE)** you wish to include in the report.

- **Completion Status:** Select from **Complete**, **In Progress** or **Not Attempted.**
- **Success Status:** Select from **Passed**, **Failed** or **Any**.

Include Archived (LE Attempts): Checking this box will include **all** archived records.

Enabled Folders: Select which folders the Transcript report will be made available to.

- **All:** Includes all content in the Learner Catalog.
- **Selected:** Only checked folders will display.
- **Include Pass Through Folders in top level Transcript:** Optionally, Pass Through folders may be displayed in the top level Transcript.

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Completion Date Range: Using the associated dropdown menu, select the Date Range you wish to utilize for the Transcript.

Folder Transcript Columns: Select the columns you wish to present in the Transcript by checking their affiliated boxes.

Scroll to bottom and click **Update** to save any changes.

Image of sample transcript below.

Accord LMS

✉ | ⓘ | LMS Administrator | Logout

| Home | My Courses | Electives | Resources | **Transcript** | Community | ECommerce | LMS Admin |

Transcript   Configuration

Refresh

User Name	Path	Folder Name	Folder Type	Completion	Completion Date	Success	Score
maryjones	Sample - Accord LMS Content	Sample - LMS Learner Training	Course	Not Attempted			
maryjones	Sample - Accord LMS Content	Sample - LMS Admin Training	Course	Not Attempted			
maryjones	Sample - Accord LMS Content > Sample - LMS Admin Training	Introduction	Chapter	Not Attempted			
maryjones	Sample - Accord LMS Content > Sample - LMS Admin Training	Accord Academy Sample Lessons	Chapter	Not Attempted			
maryjones	Sample - Accord LMS Content > Sample - LMS Admin Training	Admin Documentation and Resources	Chapter	Not Attempted			
maryjones	Sample - Accord LMS Content	Sample - LMS Learner Resources	Folder	Not Attempted			

|◀ ◀ **1** ▶ ▶| Page Size: 100 ▼   6 items in 1 pages

Refresh
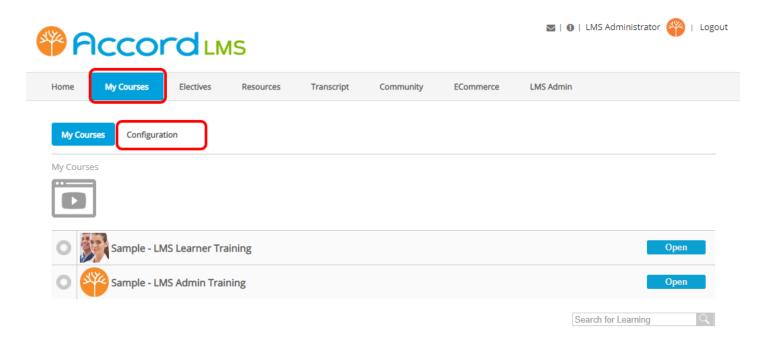
Access

The Access section will allow you to select which Learning Roles will have access to certain learning content as well as determine how this content may be accessed.

Access to learning content may also be facilitated by the submittal of access codes permitted thru various methods.

To setup various forms of access for particular Learning Roles;

- Click on the **LMS Admin** tab.
- Click on the **My Courses** tab.
- Once inside My Courses, click on it's **Configuration** tab.

Once inside the Configuration section, scroll down and click on the **Access** heading to open this panel.

Role Options:

- **Show Roles:** Check box to show available Roles.
- **Show Description:** Check box to show Role descriptions.
- **Show Status:** Check box to show the completion status of all associated Learning Elements.
- **Show Start Date:** Check box to show Role start dates.
- **Show Due Date:** Check box to show Role due dates.
- **Allow Public Unsubscribe:** Check box to enable the unsubscribe function for public Roles. This will place a small red **X** to the left of the Role on the listing page.
- **Allow Non-Public Unsubscribe:** Check box to enable the unsubscribe function for non-public Roles. This will place a small red **X** to the left of the Role on the listing page.
- **Filter Roles By Group:** Displays a list of available Roles. Use the drop-down menu to filter between different Role Groups. The available Roles are limited by permissions of the current Active Team.
- Select the **Show** check-box for each Role to be displayed on the Learner > Access tab. (This will be dependent upon Learning Roles assigned to the current Learner).

Access Code Form Submit: This will allow for the submittal of Access Codes.

Access Codes are used to grant access to specific content to specific Users or Learners.

To utilize Access Code Form Submit;

- Scroll down to **Access Code Form Submit** and check box for **Allow Form Submit**.

Access Code HTTP Submit: This will allow access codes to be submitted via HTTP.

To utilize Access Code HTTP Submit;

- Scroll down to **Access Code HTTP Submit**.

Post from Dynamic Form: Check this box to automatically configure the dynamic registration post option to work properly.

Submit Restrictions: Use the dropdown menu to select which Portals can submit Access Codes.

Enable HTTP Methods: Select which HTTP methods to support. Get Token is optional name/value pair to use for security: token=optional.value.

- **Post:** This option can be used if you are using an HTML form for enrollment. When the form is submitted the access code built within the http body is submitted as well.
- **Get:** This option allows adding **code=AccessCodeName** at the end of the URL. When this link is accessed the access code provided will assign content to Learner's **My Courses**.
- **Token:** Can only be used with the **Get** option to provide extra security functions. The value input in the provided field will be used along with the **Get** function (code=AccessCodeName) as explained above. This would be used at the end of the URL so the **Get** value (code=AccessCode) plus the **Token** value (token=LearnerCode) will result in the following URL: http://localhost/dnn1/MyPlan/tabid/58/LrnrTab379/config/LrnrCtrl379/config/Default.aspx?code=AccessCodeName&token=LearnerCode

Require HTTPS: Check box to require all HTTP submissions to be secured with HTTPS.

Allow UserID Submission: Check box to allow UserID Submission in the HTTP URL. For security reasons it is recommended to use a Token and HTTPS whenever submitting a UserID. Example: http://mySite.com/myplan.aspx?code=lmsmanager&userid=427&token=27a076b0-c156-4020-9e6e-c850e5b8189f

Allow Redirect: When selected this allows for an LMS Admin to submit redirection settings to redirect Learners based upon their specific Roles. Check the appropriate box.

- **Never:** No redirection will take place.
- **Always:** The redirection will occur every time the Learner opens the page.
- **Only with access code:** The redirection will occur only when an access code is provided.

Note: User accounts without listed Role redirections will never be redirected; such as DNN Administrators and Host.

Once all the settings have been configured with your desired preferences;

- Scroll to the bottom and click **Update** to save changes.

Access

Role Options

Show Roles: ⓘ	☑
Show Description: ⓘ	☑
Show Status: ⓘ	☑
Show Start Date: ⓘ	☑
Show Due Date: ⓘ	☑
Allow Public Unsubscribe: ⓘ	☐
Allow Non-Public Unsubscribe: ⓘ	☐
Filter Roles By Group: ⓘ	< Global Roles > ▾

Group	Name	Show	Count	Start	Due
Global Roles	Administrative Staff	☐	0	Immediate	None
Global Roles	Unverified Users	☐	1	Immediate	None
Global Roles	Warehouse Staff	☐	0	Immediate	None

Access Code Form Submit

Allow Form Submit: ⓘ	☑

Access Code HTTP Submit

Post from Dynamic Form: ⓘ	☐
Submit Restrictions: ⓘ	Portal ▾
Enable HTTP Methods: ⓘ	☐ Post
	☐ Get
Token:	
Require HTTPS: ⓘ	☐
Allow UserID Submission: ⓘ	☐
Allow Redirect:	◉ Never ○ Always ○ Only with access code

Templates

Version History: ⓘ   Created: SuperUser Account on 22 January 2018 at 3:21:35 PM

Update

Templates

Templates can be used to format the LMS Learning Catalog.

To access, set or edit Templates;

- Click on the **LMS Admin** tab.
- Click on the **My Courses** tab.
- Once in My Courses, click on it's **Configuration** tab.

Once inside Configuration, scroll down and click on the **Templates** heading to open this panel.

Here you may set **templates** for **My Courses, Calendar, Electives** and **Resources.**

These **templates** can be customized for your specifications using whatever font, backgrounds, images and layout you desire for your presentation using simple HTML with TOKEN replacements.

Each **template** is a group of files located in a subfolder under /WWWRoot/DesktopModules/ Interzoic.AccordLMS/Template. Each of the /Subfolders contains a full set of template files. The /Subfolder name becomes the 'name' of the aggregated 'template' files. You will need to use an FTP client to download the default templates and upload your new customized templates. Be sure to give your new template folder a unique name.

Here are the HTML and Tokens used for the Default.Learner.ListView.MyPlan LENode.htm:

```
<a class="[ACT.INACT] backgroundli" onclick="[LELAUNCH]" href="javascript:void(0);">

[IFLISTVIEW]

<li>

[/IFLISTVIEW]

<table style="width: 100%;">

<tr>

<td class="lenodeicon" style="width: 40px;">[ICONLARGE]</td>

<td class="lenodename Normal">[NAME]</td>

<td class="lenodescore Normal" align="right" style="min-width: 40px;">[IFSCOREGRATERTHANZERO][SCORE%][/IFSCOREGRATERTHANZERO]</td>

<td class="lenodestatusicon" align="right" style="min-width: 40px;">[STATUSICONLARGE]</td>

</tr>

</table>

[IFLISTVIEW]

</li>

[/IFLISTVIEW]

</a>
```

⚠ **Default templates will be copied over with each new Accord LMS upgrade, so customizations should be made to new templates saved to sub folders with unique names.**

You can edit the template files locally and then copy back to the web server. Often this in an iterative process where you make edits locally, upload to the server, refresh a browser opened to your Learner catalog, see how the updates look and then make your final adjustments. From the FTP client screen shot you can see we have seven default templates.

Default templates are provided for all of the existing traditional/default presentations. Accord LMS may update the default templates over time and each upgrade to the Accord LMS will copy over the existing templates. If you want to customize any of the default templates, be sure to copy the template files to a new directory with a unique name. Once you have created a customized template and FTPed back to your server, you can select the template from the drop-down list.

> ℹ️ **More information on skins and templates included with the Accord LMS can be found by following this Responsive Skin and Templates blog.**

Template Files - List View

The List View templates included within the Accord LMS provide a standard structure for displaying Folders, Breadcrumbs and Quicklinks. The templates can be customized to your specifications using whatever font, backgrounds, images and layout you need to achieve your desired presentation using simple HTML with TOKEN replacements.

Top

- **Top.htm** defines the top structure of the Catalog List View. In the default template Parent Folder Name and QuickLinks Tokens are included in this file.

Bottom

- **Bottom.htm** defines the bottom of the Catalog List View.

Left

- **Left.htm** defines the left structure of the Catalog List View. In the default template navigational Breadcrumb tokens are included in this file.

Right

- **Right.htm** defines the right section of the Catalog List View.

Header and Footer

- **Header.htm** defines the header of the Catalog ListView, such as the table for the column headers on the default templates.
- **Footer.htm** defines the footer of the Catalog ListView.

Content

- **Folder Node - FolderNode.htm** defines the layout of the Folder nodes.
- **LE Node - LENode.htm** - defines the layout of the Learning Element nodes.

CSS

- **Template.css** allows CSS customization for the Catalog ListView. This file has precedence over the default CSS that ships with the Accord LMS. Colors for mouse over, selected, header colors, failure and success fonts can all be easily defined.

Template Tokens

For a complete list of all available tokens and detailed instructions on how to create your own templates, please refer to the section: Learner UI Templates.

The Reports Module

The Reports Module - Introduction

The Accord LMS allows you define a variety of Reports to track Quiz and Survey results, Learning Element utilization and Learner Activity.

All Learning Element access and utilization is tracked and captured automatically to an SQL database.

Reports are created from these SQL records.

A given Report may be filtered to gather specific information and can be exported to a PDF file, Excel or PowerPoint presentation in a variety of formats.

Note; the Reports tab may or may not be present depending on the selected Active Team; should there be more than one Active Team.

Reports
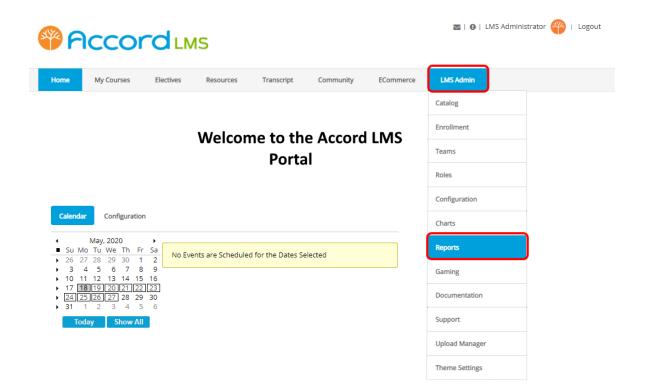
The Reports page is divided into three main sections; each section containing reports for specific kinds of utilization and activity.

These report-types will include;

- **LE Activity Quick Reports:** This is a report type which can be setup with 3 easy steps to efficiently gather data on selected Learning Elements (LE).
- **Learner Activity:** These Reports are grouped by **Roles** and **Learners**.
- **Learning Content Utilization:** These Reports are grouped by **Folders** and **Learning Elements.**

To Access Reports;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Wave over the **LMS Admin** tab.
- Click on **Reports**.

The Reports panel will open.

Quick Reports

Easy Configuration

LE Activity with Learner Detail	< Define New Report > ▾	Continue

Learner Activity

Reports grouped by Roles and Learners

Learner Activity/Transcript with Folder Detail	< Define New Report > ▾	Continue
Learner Activity/Transcript with LE Detail	< Define New Report > ▾	Continue
Learner Activity/Score with Question Detail	< Define New Report > ▾	Continue
Learner Activity Most Active	< Define New Report > ▾	Continue
Learner Activity Summary	< Define New Report > ▾	Continue
Learner Accounts with Profile Detail	< Define New Report > ▾	Continue

Learning Content Utilization

Reports grouped by Folders and Learning Elements

Learning Folder with Learner Detail	< Define New Report > ▾	Continue
Learning Folder Summary with Folder Detail	< Define New Report > ▾	Continue
LE Utilization with Learner Detail	< Define New Report > ▾	Continue
LE Utilization Most Utilized	< Define New Report > ▾	Continue
Question Utilization with Learner Detail	< Define New Report > ▾	Continue

Learning Element Activity Quick Report

Three Easy Steps to Generate a Learning Element Activity Quick Report
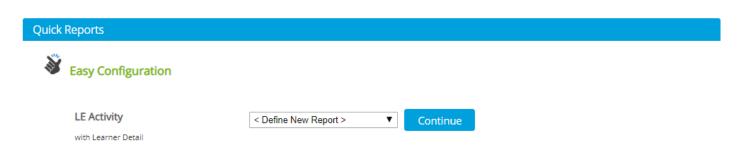
LE Activity Quick Reports: This is a report type which can be setup with 3 easy steps to gather data on selected Learning Elements (LE).

To Access LE Activity Quick Reports;

- Ensure the proper **Active Team** is selected.
- Wave over the **LMS Admin** tab.
- Click on **Reports**.

- In the dropdown menu next to **LE Activity Report**, select a pre-defined report or define a new report.
- Click **Continue**

- **STEP 1: Utilizing the Learners tab, select who will appear on this report.**
  You may select specific learners, members of learning roles or members of teams.
- Use button to select **Users, Roles or Teams**.

Reports » LE Activity Report
Definitions

| Learners | Content | Date | Columns |

STEP 1: SELECT WHO WILL APPEAR ON THIS REPORT
You may select specific learners, members of learning roles, or members of teams. Proceed to step two to select learning content that will appear on this report.

○ Users ● Roles ○ Teams

- **STEP 2: Utilizing the Content tab, select what content will appear on this report.**
  Selecting folders will include all Learning Elements within the selected folders. Selecting specific Learning Elements will include only those elements.

Reports » LE Activity Report
Definitions

| Learners | Content | Date | Columns |

STEP 2: SELECT WHAT CONTENT WILL APPEAR ON THIS REPORT
Selecting folders will include all Learning Elements within the selected folders. Selecting specific Learning Elements will include only those elements. Proceed to step three to select the time frame for this report.

● Folders ○ Learning Elements
☑ All Folders

- **STEP 3: Utilizing the Date tab, select when the Learning Element activity occurred.**
  Using the associated dropdown menu, select a date range in which the Learning Element activity occurred. When generating this report, you will receive all activity for the selected learners and learning elements which occurred within the selected date range. If necessary, use the **Columns** tab to select any desired report columns.
- Click **Generate Report** to run this report.
- Export a given report to PDF or Excel by selecting the appropriate option just below **Generate Report**.

If you need to change the name or title of a given pre-defined **LE Activity Report**, click on **Definitions** to open the necessary panel.

Learner Activity Reports

Learner Activity Reports provide information on Learning Role and Learner activity based on Learning Element Details, Question Details or even which Learners were most active within a specific date range. There are six available reports in this section.

1. **Learner Activity/Transcript with Folder Detail**
2. **Learner Activity/Transcript with LE Detail**
3. **Learner Activity/Score with Question Detail**
4. **Learner Activity Most Active**
5. **Learner Activity Summary**
6. **Learner Accounts with Profile Detail**

Here you may also set the necessary details in order to Verify a Learner's Uploaded Assignment.

Set Details to Verify a Learner Uploaded Assignment

In order to set your report details to be able to Verify a Learner Uploaded Assignment, please scroll below and see the information near the end of **Learner Activity/Transcript with LE Detail** reports.

To access Learner Activity Reports;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Wave over the **LMS Admin** tab.
- Click on **Reports**.

The Report panel will open.

Scroll down to the section which reads **Learner Activity**.

Learner Activity/Transcript: with Folder Detail

From the dropdown menu you may either select an existing Report type or create a new one.

- To create a new type of Report, select **Define New Report** from the dropdown menu.
- Click the **Continue** button.

Filters

Click heading to open section if necessary.

- **Learning Catalog:** Select **All** to include all Learning Element Folders or use the **Selected** option to select specific Learning Element Folders.
- **Teams:** Select all Teams by checking box next to **All Members** or select specific Teams.
- **All Team Member Enrollment:** check box to include Enrollment for All Team Members.
- **Learning Role Enrollment:** to include all Roles, check box next to **All Roles.** You may select specific Roles by checking the appropriate box.
- **Role Criteria:** Select to **Match All** or **Match Any**. With a **Match All** query, if you select multiple Roles/Learners, only those folders/Learning Elements that have **all** of the selected Roles (and Learners) enrolled in them will be displayed in the report. With a **Match Any** query, if you select multiple Roles/Learners, all the folders/Learning Elements that have **any** of the selected Roles (and Learners) enrolled in them will be displayed in the report.
- **Role Status:** Check the box next to the applicable Role Status: **Pending**, **Active** or **Expired**.
- **Additional Enrollment:** Check the box to select **Individual Enrollment** to include non-Role enrollments. This option is commonly used when you have enrollments made to specific Learners.
- **Learners:** Click **Show Search** to display the search options. Use this field to search for specific Learners within the Selected Learning Roles.
- **Attempted Date Range:** Allows you to apply a filter with a given Date Range.
- **Export Format:** Select a Report output option. More Report export options are available from the **on-page Report Viewer**.

Advanced Options

Click heading to open section if necessary.

Folder Status: Use the dropdown menu to select the types of **Attempts** to Include in the report. Select **Current and All Archived** to include all attempts.

- **Completion Status:** Options available allow you to choose to report Learning Elements with **Complete**, **In Progress** and **Not Attempted** status.
- **Success Status:** Select which LE success status to include. The choices are **Passed**, **Failed** or **Any**.
- **Due Date Range:** Select the Due Date Range you want included in the Report.
- **LE Attempts:** Select the type of **Attempts** to include for the **Learning Element Details Reports.** You may choose to show only the **Best Attempt, Last Attempt, Last Completed Attempt, First Completed Attempt** or **All Attempts.**
- **Include Archived Attempts:** Include Archived Attempts for LE Attempt drill down report.
- **Include Enrollment from Parent Teams:** Include Enrollment from the Parent Teams of the selected Child Teams.
- **Portals:** Select which Portals will be used to obtain the data for the Report.

Display Columns

Click heading to open section if necessary.

Select the columns you want to be presented in the resulting report by checking the appropriate box.

Sample Report

Click on **Generate Report** to view; or download the report file according to your selected format.

Depending on what specific display columns were selected, the report will display similar to image below.

To observe various details, click the **View** link in the **LE Details** column. This will open the **Learner Activity/Transcript: LE Detail** drill down report for the selected Learner.

Click on **Original Report** to go back to the previous report.

Sample **Learner Activity/Transcript: LE Detail** drill down report for a selected Learner.

Learner Activity/Transcript: with LE Detail

From the dropdown menu you may either select an existing Report type or create a new one.

- To create a new type of Report, select **Define New Report** from the dropdown menu.
- Click the **Continue** button.

Filters

Click heading to open section if necessary .

- **Learning Catalog:** Select **All** to include all Learning Element Folders or use the **Selected** option to select specific Learning Element Folders.
- **Teams:** Select all Teams by checking box next to **All Members** or select specific Teams.
- **All Team Member Enrollment:** check box to include Enrollment for All Team Members.
- **Learning Role Enrollment:** to include all Roles, check box next to **All Roles.** You may select specific Roles by checking the appropriate box.
- **Role Criteria:** Select to **Match All** or **Match Any**. With a **Match All** query, if you select multiple Roles/Learners, only those folders/Learning Elements that have **all** of the selected Roles (and Learners) enrolled in them will be displayed in the report. With a **Match Any** query, if you select multiple Roles/Learners, all the folders/Learning Elements that have **any** of the selected Roles (and Learners) enrolled in them will be displayed in the report.
- **Role Status:** Check the box next to the applicable Role Status: **Pending**, **Active** or **Expired**.
- **Additional Enrollment:** Check the box to select **Individual Enrollment** to include non-Role enrollments. This option is commonly used when you have enrollments made to specific Learners. Select **Unenrolled (with Attempts)** to include **any** attempted Learning Elements.
- **Learners:** Click on **Show Search** to display the search options. An additional field will display. Use this field to search for **specific Learners** within the Selected Learning Roles.
- **Attempt Date Range:** Allows you to apply a Filter with a given Date Range.
- **Export Format**: Select a Report output option. More export options are available from the **on-page Report Viewer**.

Advanced Options

Click heading to open section if necessary.

Completion Status: Select the Learning Element Status to include in the report. Options available allow you to choose to report Learning Elements with **Complete**, **In Progress** and **Not Attempted** status.

- **Success Status**: Select which LE success status to include. The choices are **Passed**, **Failed** or **Any**.
- **LE Attempts**: Select the type of Attempts to include in the report. You can include all the attempts by selecting the **All** option.
- **Include Archived Attempts**: By checking this box all attempt records will be included, even those that are older than the **expired** attempt record(s).
- **Include All Enrollment Attempts:** Checking this box will display a report column for any Learner Enrollment attempts made outside of the selected time frame. Leaving this box unchecked will result in the report only displaying Learner Enrollment attempts made within the selected time frame.
- **Include Enrollment from Parent Teams:** Include Enrollment from the Parent Teams of the selected Child Teams.
- **Include ID values in CSV:** Include ID values in the CSV export for the following columns if selected: **Folder, LE, User, Attempt** and **User Created on date.**
- **Portals:** Select which Portals will be used to obtain the data for the Reports.

Display Columns

Click heading to open section if necessary.

- Select the columns you want to be presented in the resulting report by checking the appropriate box.

Verifying Assignment Upload

As an LMS Admin, with the report type **Learner Activity/Transcript with LE Detail**, you have the option of being able to verify any digital information which was uploaded by a Learner via the Learning Element Type **'Assignment Upload'**.

To verify a given **Assignment Upload** from a selected Learner;

While setting up the desired parameters for your report, ensure to check the box next to **'Assignment'** under the **Learning Element** section of **Display Columns**.

Should you choose, check box to display a report column showing the **Assignment Grading**.

For documentation help on grading a Learner Uploaded Assignment, please go to; [Grading a Learner Uploaded Assignment](#)

Sample Report

Click on **Generate Report** to view; or download the report file according to your selected format.

Depending on what specific display columns were selected, the report will display similar to image below.

After generating your report, scroll down to the selected Learner(s) and click on the highlighted **Assignment Upload** link under the **Assignment** column which will be in the row adjacent to the appropriate Learner. The digital information which was uploaded by the Learner will display.*

*Note; the particular method in which the selected link will display may depend upon your individual system settings.

Learner Activity: Score with Question Detail

From the dropdown menu you may either select an existing Report type or create a new one.

- To create a new type of Report, select **Define New Report** from the dropdown menu.
- Click the **Continue** button.

Filters

Click heading to open section if necessary.

- **Learning Catalog:** Select **All** to include all Learning Element Folders or use the **Selected** option to select specific Learning Element Folders.
- **Teams:** Select all Teams by checking box next to **All Members** or select specific Teams.
- **All Team Member Enrollment:** check box to include Enrollment from All Team Members.
- **Learning Role Enrollment:** to include all Roles check box next to **All Roles.** You may select specific Roles by checking the appropriate box.
- **Role Criteria**: Select **Match All** or **Match Any**. With a **Match All** query, if you select multiple Roles/Learners, only those folders/Learning Elements that have **all** of the selected roles (and Learners) enrolled in them will be displayed in the report. With a **Match Any** query, if you select multiple Roles/Learners, all the folders/Learning Elements that have **any** of the selected roles (and Learners) enrolled in them will be displayed in the report.
- **Role Status**: Check the box next to the applicable Role Status: **Pending**, **Active** or **Expired**.

- **Additional Enrollment:** Check the box to select **Individual Enrollment** to include non-Role enrollments. This option is commonly used when you have enrollments made to specific Learners. Select **Unenrolled (with Attempts)** to include **any** attempted Learning Elements.
- **Learners:** Click on **Show Search** to display search options. A search field will display. Use this field to search for **specific Learners** within the Selected Learning Roles.
- **Attempt Date Range:** Allows you to apply a filter with a given Date Range.
- **Export Format**: Select a Report output option. More export options are available from the **on-page Report Viewer**.

Advanced Options

Click heading to open section if necessary.

- **Completion Status:** Options available allow you to choose to report Learning Elements with **Complete** and **In Progress**.
- **Success Status:** Select which LE success status to include. The choices are **Passed**, **Failed** or **Any**.
- **LE Attempts**: Select the type of Attempts to include in the report. You can include all the attempts by selecting the **All** option.
- **Include Archived Attempts**: By checking this box all attempt records will be included, even those that are older than the "expired" attempt record(s).
- **Include Enrollment from Parent Teams:** Include Enrollment from the Parent Teams of the selected Child Teams.
- **Portals:** Select which Portals will be used to obtain the data for the Reports.

Display Columns

Click heading to open section if necessary.

- Select the specific columns you want to be presented in the resulting report by checking the appropriate box.

Sample Report

Click on **Generate Report** to view; or download the report file according to your selected format.

Depending on what specific display columns were selected, the report will display similar to image below.

Learner Activity: Most Active

From the dropdown menu you may either select an existing Report type or create a new one.

- To create a new type of Report, select **Define New Report** from the dropdown menu.
- Click the **Continue** button.

Filters

Click heading to open section if necessary.

- **Learning Catalog:** Select **All** to include all Learning Element Folders or use the **Selected** option to select specific Learning Element Folders.
- **Teams:** Select all Teams by checking box next to **All Members** or select specific Teams.
- **All Team Member Enrollment:** check box to include Enrollment from All Team Members.
- **Learning Role Enrollment:** to include all Roles check box next to **All Roles.** You may select specific Roles by checking the appropriate box.
- **Role Criteria**: Select **Match All** or **Match Any**. With a **Match All** query, if you select multiple Roles/Learners, only those folders/Learning Elements that have **all** of the selected Roles (and Learners) enrolled in them will be displayed in the report. With a **Match Any** query, if you select multiple Roles/Learners, all the folders/Learning Elements that have **any** of the selected Roles (and Learners) enrolled in them will be displayed in the report.
- **Role Status**: Check the box next to the applicable Role Status: **Pending**, **Active** or **Expired**.
- **Additional Enrollment:** Check the box to select **Individual Enrollment** to include non-Role enrollments. This option is commonly used when you have enrollments made to specific Learners. Select **Unenrolled (with Attempts)** to include **any** attempted Learning Elements.
- **Learners:** Click on **Show Search** to display search options. A search field will display. Use this field to search for **specific Learners** within the Selected Learning Roles.
- **Attempt Date Range:** Allows you to apply a Filter with a given Date Range.
- **Export Format**: Select a Report output option. More export options are available from the **on-page Report Viewer.**

Learner Activity: Most Active

Reports » Learner Activity: Most Active

| Definitions | › |
| Filters | ⌄ |

Specify the Filter settings used in the Report.

Learning Catalog: ★ ⓘ ○ All ● Selected
☐ Select / Unselect
▸ ☐ 🗀 Sample - Accord LMS Content
▸ ☐ 🗀 Accord Plus Courses

Teams: ★ ⓘ ▸ ☐ All Members

All Team Member Enrollment: ⓘ ☐

Learning Role Enrollment: ★ ⓘ ☐ All Roles
▸ ☐ Global Roles
▸ ☐ Boston-North Office
▸ ☐ LMS Example Learning Roles
▸ ☐ Translation Roles

Role Criteria: ⓘ ○ Match All ● Match Any

Role Status: ★ ⓘ ☐ Pending ☑ Active ☐ Expired

Additional Enrollment: ⓘ ☐ Individual Enrollment ☐ Unenrolled (with Attempts)

Learners: ⓘ [Show Search]

Attempt Date Range: ⓘ [Last 30 Days ▾]

Export Format: ⓘ [Report Viewer (on page) ▾]

Advanced Options

Click heading to open section if necessary.

- **Completion Status**: Options available allow you to choose to report LE's with **Complete**, **In Progress** and **Not Attempted** status.
- **Success Status**: Select which LE success status to include. Choices are **Passed**, **Failed** or **Any**.
- **Due Date Range:** Select the Due Date Range you want to report.
- **LE Attempts**: Select the type of Attempts to include in the report. You can include all the attempts by selecting the **All** option.
- **Include Archived Attempts**: By checking this box all attempt records will be included, even those that are older than the **expired** attempt record(s).
- **Include Enrollment from Parent Teams:** Include Enrollment from the Parent Teams of the selected Child Teams.
- **Portals:** Select which Portals will be used to obtain the data for the Reports.

Advanced Options ⌄

Completion Status: ⓘ	☑ Complete ☑ In Progress ☑ Not Attempted
Success Status: ⓘ	○ Passed ○ Failed ● Any
Due Date Range: ⓘ	All Time ⌄
LE Attempts: ⓘ	Last ⌄
Include Archived Attempts: ⓘ	☐
Include All Enrollment Attempts: ⓘ	☐
Include Enrollment from Parent Teams: ⓘ	☑
Portals: ⓘ	☐ All Portals
	☐ Documentation

Display Columns

Click heading to open section if necessary.

- **General Details**: Select the columns you want to be presented in the resulting report by checking the appropriate box.
- **Profile Details**: Select up to 10 User Profile properties to be included in the report.

Display Columns ⌄

General Details

☑ User Name	☐ Portal Name	☑ Complete	☐ Failed
☑ First Name	☐ Team	☑ In Progress	☐ Score
☑ Last Name	☐ Role	☑ Not Attempted	☐ Passing
☑ Email	☐ Due Date	☐ Passed	☐ Duration
☐ Authorized	☑ Attempt		

Profile Details

☐ Prefix	☐ Telephone	☐ LinkedIn	☐ Region
☐ Middle Name	☐ Company Name	☐ Facebook	☐ Country
☐ Photo	☐ Website	☐ Unit	☐ Postal Code
☐ Biography	☐ IM	☐ Street	☐ Preferred Time Zone
☐ Cell/Mobile	☐ Twitter	☐ City	☐ Preferred Locale
☐ Fax	☐ Skype ID		

Generate Report

Sample Report

Click on **Generate Report** to view or download the report file according to your selected format.

Depending on what specific display columns were selected, the report will display similar to image below.

Learner Activity: Summary

From the dropdown menu you may either select an existing Report type or create a new one.

- To create a new type of Report, select **Define New Report** from the dropdown menu.
- Click the **Continue** button.

Filters

Click heading to open section if necessary.

- **Learning Catalog:** Select **All** to include all Learning Element Folders or use the **Selected** option to select specific Learning Element Folders.
- **Teams:** Select all Teams by checking box next to **All Members** or select specific Teams.
- **All Team Member Enrollment:** check box to include Enrollment from All Team Members.
- **Learning Role Enrollment:** to include all Roles check box next to **All Roles.** You may select specific Roles by checking the appropriate box.
- **Role Criteria**: Select **Match All** or **Match Any**. With a **Match All** query, if you select multiple Roles/Learners, only those folders/Learning Elements that have **all** of the selected Roles (and Learners) enrolled in them will be displayed in the report. With a **Match Any** query, if you select multiple Roles/Learners, all the folders/Learning Elements that have **any** of the selected Roles (and Learners) enrolled in them will be displayed in the report.
- **Role Status**: Check the box next to the applicable Role Status: **Pending**, **Active** or **Expired**.
- **Additional Enrollment:** Check the box to select **Individual Enrollment** to include non-Role enrollments. This option is commonly used when you have enrollments made to specific Learners. Select **Unenrolled (with Attempts)** to include **any** attempted Learning Elements.
- **Learners:** Click on **Show Search** to display the search options. A search field will display. Use this field to search for **specific Learners** within the Selected Learning Roles.
- **Attempt Date Range:** Allows you to apply a Filter with a given Date Range.
- **Export Format**: Select a Report output option. More export options are available from the **on-page Report Viewer**.

Advanced Options

Click heading to open section if necessary.

- **Folder Status:** Use the dropdown menu to select the types of **Attempts** to Include in the report. Select **Current and All Archived** to include all attempts.
- **Completion Status:** Options available allow you to choose to report Learning Elements with **Complete**, **In Progress** and **Not Attempted** status.
- **Success Status:** Select which LE success status to include. The choices are **Passed**, **Failed** or **Any**.
- **Due Date Range:** Select the Due Date Range you want included in the Report.
- **LE Attempts:** Select the type of **Attempts** to include for the **Learning Element Details Reports.** You may choose to show only the **Best Attempt, Last Attempt, Last Completed Attempt, First Completed Attempt** or **All Attempts.**
- **Include Enrollment from Parent Teams:** Include Enrollment from the Parent Teams of the selected Child Teams.
- **Portals:** Select which Portals will be used to obtain the data for the Report.

Display Columns

Click heading to open section if necessary.

- **Learner Details**: Select the columns you want to be presented in the resulting report by checking the appropriate box.
- **Report Details:** Select which columns will be presented under Report Details.
- **Profile Details**: Select up to 10 User Profile properties to be included in the report.

Sample Report

Click on **Generate Report** to view; or download the report file according to your selected format.

Depending on what specific display columns were selected, the report will display as shown below.

Learner Accounts with Profile Detail

From the dropdown menu you may either select an existing Report type or create a new one.

- To create a new type of Report, select **Define New Report** from the dropdown menu.
- Click the **Continue** button.

Filters

Click heading to open section if necessary.

- **Teams:** Select all Teams by checking box next to **All Members** or select specific Teams.
- **Learning Role Enrollment:** to include all Roles check box next to **All Roles.** You may select specific Roles by checking the appropriate box.
- **Role Criteria:** Select to **Match All** or **Match Any**. With a **Match All** query, if you select multiple Roles/Learners, only those folders/Learning Elements that have **all** of the selected Roles (and Learners) enrolled in them will be displayed in the report. With a **Match Any** query, if you select multiple Roles/Learners, all the folders/Learning Elements that have **any** of the selected Roles (and Learners) enrolled in them will be displayed in the report.
- **Role Status:** Check the box next to the applicable Role Status: **Pending**, **Active** or **Expired**.
- **Learners:** Click on **Show Search** to display the search options. A search field will display. Use this field to search for your selected Learners.
- **Created Date:** Use dropdown menu to filter by User created date range.
- **Last Login Date:** Use dropdown menu to filter by last login date range.
- **Export Format:** Select report output format. Use CSV for large data sets.

Advanced Options

Click heading to open section if necessary.

Include Enrollment from Parent Teams: Include Enrollment from the Parent Teams of the selected Child Teams.

- **Portals:** Select which Portals will be used to obtain the data for the Report.

Display Columns

Click heading to open section if necessary.

- **Learner Details**: Select the columns you want to be presented in the resulting report by checking the appropriate box.
- **Profile Details**: Select up to 10 User Profile properties to be included in the report.

Sample Report

Click on **Generate Report** to view; or download the report file according to your selected format.

Depending on what specific display columns were selected, the report will display similar to image below.

Learning Content Utilization Reports

Learning Element Utilization reports provide information on LE Utilization or Question Utilization with Role and Learner details based on Folders and Quizzes. There are five available reports in this section.

1. **Learning Folder with Learner Detail**
2. **Learning Folder Summary with Folder Detail**
3. **LE Utilization with Learner Detail**
4. **LE Utilization Most Utilized**
5. **Question Utilization with Learner Detail**

To access Learning Content Utilization Reports;

- Ensure the proper larger **Active Team** is selected by using the associated dropdown menu; should more than one Active Team exist.
- Navigate to **LMS Admin > Reports**

- Scroll down to **Learning Content Utilization.**

Learning Folder with Learner Detail

From the drop-down menu you may either select an existing Report type or create a new one.

- To create a new type of Report, select **Define New Report** from the drop-down menu.
- Click the **Continue** button.

Scroll down to **Filters** and open the section if necessary clicking on the arrow.

- Select which **Folders** will be used to obtain the data for the Report.

- **Teams:** Select all Teams by checking box next to **All Members** or select specific Teams.

- **All Team Member Enrollment:** check box to include Enrollment from All Team Members.
- **Learning Role Enrollment:** to include all Roles check box next to **All Roles.** You may select specific Roles by checking the appropriate box.

- **Role Criteria:** Select **Match All** or **Match Any**. With **Match All**, if you select multiple Roles/ Learners, only those folders/Learning Elements that have **all** of the selected Roles (and

Learners) enrolled in them will be displayed in the report. With **Match Any**, if you select multiple Roles/Learners, all the folders/Learning Elements that have **any** of the selected Roles (and Learners) enrolled in them will be displayed in the report.

- **Role Status:** Check the box next to the applicable Role Status whether it be **Pending**, **Active** or **Expired.**
- **Additional Enrollment:** Check the box to select **Individual Enrollment** to include non-Role enrollments. This option is commonly used when you have enrollments made to specific Learners.

- **Learners:** Click **Show Search** to display the search options.

- Use this field to search for **specific Learners** within the selected Learning Roles.

- **Attempt Date Range:** Allows you to apply a Filter with a given Date Range.

- **Export Format:** Select a Report output option. Use **All Column Raw CSV (comma delimited)** for large data-sets.

- **Advanced Options:** Click the **down arrow** to display the Advanced Options.

- **Folder Attempts:** Use the drop-down menu to select the types of **Attempts** to Include in the report. Select **Current and All Archived** to include all attempts.
- **Completion Status:** Options available allow you to choose to report Learning Elements with **Complete**, **In Progress** and **Not Attempted** status.
- **Success Status:** Select which LE success status to include. The choices are **Passed**, **Failed** or **Any**.
- **Due Date Range:** Select the Due Date Range you want included in the Report.
- **LE Attempts (for LE Details):** Select the type of **Attempts** to include for the **Learning Element Details Reports.** You may choose to show only the **Best Attempt, Last Attempt, Last Completed Attempt, First Completed Attempt** or **All Attempts.**

- **Include Enrollment from Parent Teams:** Include Enrollment from the Parent Teams of the selected Child Teams.
- **Portals:** Select which portals the report data will be obtained from.

- **Display Columns:** Click the down arrow to display this section.

- Select the columns you want to be presented in the resulting report by checking the boxes next to them.

Display Columns   ^

Report Details

☑ User Name	☐ Portal Name	☑ Completion	☐ First Attempt
☐ First Name	☐ Team	☐ Complete	☑ Last Attempt
☐ Last Name	☐ Role Name	☑ Success	☑ Learning Elements
☐ Email	☐ Due Date	☑ Score	

Profile Details

☐ Prefix	☐ City	☐ Cell	☐ PreferredTimeZone
☐ MiddleName	☐ Region	☐ Fax	☐ TimeZone
☐ Suffix	☐ Country	☐ Website	☐ PreferredLocale
☐ Unit	☐ PostalCode	☐ IM	☐ Photo
☐ Street	☐ Telephone	☐ Biography	

[Generate Report]

[Return]

- Click **Generate Report** to view or download the report file according to the selected format chosen above. The report will display as shown below.

Display Columns   ^

Report Details

☑ User Name	☐ Portal Name	☑ Completion	☐ First Attempt
☐ First Name	☐ Team	☐ Complete	☑ Last Attempt
☐ Last Name	☐ Role Name	☑ Success	☑ Learning Elements
☐ Email	☐ Due Date	☑ Score	

Profile Details

☐ Prefix	☐ City	☐ Cell	☐ PreferredTimeZone
☐ MiddleName	☐ Region	☐ Fax	☐ TimeZone
☐ Suffix	☐ Country	☐ Website	☐ PreferredLocale
☐ Unit	☐ PostalCode	☐ IM	☐ Photo
☐ Street	☐ Telephone	☐ Biography	

[Generate Report]

[Return]

- Click the **View** link in the **Learning Elements** column to view report details for a selected Learner.

Learning Folder with Learner Detail

Date Range: All Time
Report Generated: 10/13/2017 2:02:50 PM

Refresh

Drag a column header and drop it here to group by that column.

User Name	Completion	Completion Date	Success	Score	Last Attempt	Learning Elements
izmadmin	In Progress				2099.10.05	View
izmadmin	In Progress				2016.09.26	View
reguser	In Progress				2099.10.05	View
reguser	Completed	2016.05.12		45%	2016.09.28	View
portaladmin	In Progress				2017.07.17	View
portaladmin	In Progress				2016.09.26	View
lmsadmin	In Progress				2017.07.17	View
lmsadmin	In Progress				2016.09.26	View
Tmurray	In Progress				2099.10.05	View
Tmurray	In Progress				2016.09.26	View
Nnelson	In Progress				2099.10.05	View
Nnelson	In Progress				2016.09.26	View
Karbuckle	In Progress				2099.10.05	View
Karbuckle	In Progress				2016.09.26	View
Roy	Not Attempted					View

Page Size: 100

75 items in 1 pages

Refresh

- Use the **Previous Reports** drop-down menu to go back to a previous report.

Previous Reports: Learner Activity/Transcript with LE Detail - Learning Folder: LMS Learner Training - User: NicoletteNelson ▼

Learner Activity/Transcript with LE Detail

Date Range: All Time
Report Generated: 10/13/2017 2:14:58 PM

Refresh

Drag a column header and drop it here to group by that column.

User Name	Course	Folder Type	LE Name	Completion	Success	Score
Nnelson	LMS Learner Training	Folder	Community Features	Complete	Passed	85%
Nnelson	LMS Learner Training	Folder	Community Features	Complete	Passed	90%
Nnelson	LMS Learner Training	Folder	Community Features	Complete	Passed	100%
Nnelson	LMS Learner Training	Folder	Community Features	Complete	Passed	90%
Nnelson	LMS Learner Training	Folder	Community Features	Complete	Passed	90%
Nnelson	LMS Learner Training	Folder	Community Features	Complete	Passed	85%
Nnelson	LMS Learner Training	Folder	Learner Experience	Complete	Passed	100%
Nnelson	LMS Learner Training	Folder	Learner Experience	Complete	Passed	90%
Nnelson	LMS Learner Training	Folder	Learner Experience	Complete	Passed	90%
Nnelson	LMS Learner Training	Folder	LMS Learner Quiz	Complete	Passed	70%
Nnelson	LMS Learner Training	Folder	LMS Learner Quiz	Complete	Passed	90%
Nnelson	LMS Learner Training	Folder	LMS Learner Quiz	Complete	Passed	100%
Nnelson	LMS Learner Training	Folder	LMS Learner Quiz	Complete	Passed	90%
Nnelson	LMS Learner Training	Folder	Vimeo/Youtube video	Not Attempted		
Nnelson	LMS Learner Training	Folder	BTOS Certificate of completion	None		

Page Size: 100

31 items in 1 pages

Refresh

Learning Folder Summary with Folder Detail

From the drop-down menu you may either select an existing Report type or create a new one.

- To create a new type of Report, select **Define New Report** from the drop-down menu.
- Click the **Continue** button.

Scroll down to **Filters** and open the section if necessary clicking on the arrow.

- **Learning Catalog:** Select **All** to include all Learning Element Folders or use the **Selected** option to select specific Learning Element Folders.

- **Teams:** Select all Teams by checking box next to **All Members** or select specific Teams.

- **All Team Member Enrollment:** check box to include Enrollment from All Team Members.
- **Learning Role Enrollment:** to include all Roles check box next to **All Roles.** You may select specific Roles by checking the appropriate box.

- **Role Criteria:** Select **Match All** or **Match Any**. With **Match All**, if you select multiple Roles/Learners, only those folders/Learning Elements that have **all** of the selected Roles (and Learners) enrolled in them will be displayed in the report. With **Match Any**, if you select multiple Roles/Learners, all the folders/Learning Elements that have **any** of the selected Roles (and Learners) enrolled in them will be displayed in the report.
- **Role Status (required):** Check the box next to the applicable Role Status: **Pending**, **Active** or **Expired**.
- **Additional Enrollment:** Check the box to select **Individual Enrollment** to include non-Role enrollments. This option is commonly used when you have enrollments made to specific Learners.

- **Learners:** Click **Show Search** to display the search options.

- Use this field to search for **specific Learners** within the selected Learning Roles.

- **Attempt Date Range:** Allows you to apply a Filter with a given Date Range.

- **Export Format:** Select a Report output option. Use **All Column Raw CSV (comma delimited)** for large data-sets.

- **Advanced Options:** Click the down arrow to display the Advanced Options.

- **Folder Attempts:** Use the drop-down menu to select the types of **Attempts** to Include in the report. Select **Current and All Archived** to include all attempts.
- **Completion Status:** Options available allow you to choose to report Learning Elements with **Complete**, **In Progress** and **Not Attempted** status.
- **Success Status:** Select which LE success status to include. The choices are **Passed**, **Failed** or **Any**.
- **Due Date Range:** Select the Due Date Range you want included in the Report.
- **LE Attempts (for LE Details):** Select the type of **Attempts** to include for the **Learning Element Details Reports.** You may choose to show only the **Best Attempt, Last Attempt, Last Completed Attempt, First Completed Attempt** or **All Attempts.**
- **Include Enrollment from Parent Teams:** Include Enrollment from the Parent Teams of the selected Child Teams.

- **Display Columns:** Click the down arrow to display this section.

- Select the columns you want to be presented in the resulting report by checking the boxes next to them.

- Click **Generate Report** to view or download the report file according to the selected format chosen above. The report will display as shown below.

You can obtain more specific data by clicking on **View** links provided within the report.

LE Utilization with Learner Detail

From the drop-down menu you may either select an existing Report type or create a new one.

- To create a new type of Report, select **Define New Report** from the drop-down menu.
- Click the **Continue** button.

Scroll down to **Filters** and open the section if necessary clicking on the arrow.

- **Learning Catalog:** Select **All** to include all Learning Element Folders or use the **Selected** option to select specific Learning Element Folders.

- **Teams:** Select all Teams by checking box next to **All Members** or select specific Teams.

- **All Team Member Enrollment:** check box to include Enrollment from All Team Members.
- **Learning Role Enrollment:** to include all Roles check box next to **All Roles.** You may select specific Roles by checking the appropriate box.

- **Role Criteria:** Select **Match All** or **Match Any**. With a **Match All** query, if you select multiple Roles/Learners, only those folders/Learning Elements that have **all** of the selected Roles

(and Learners) enrolled in them will be displayed in the report. With a **Match Any** query, if you select multiple Roles/Learners, all the folders/Learning Elements that have **any** of the selected Roles (and Learners) enrolled in them will be displayed in the report.

- **Role Status:** Check the box next to the applicable Role Status whether it be **Pending**, **Active** or **Expired.**
- **Additional Enrollment:** Check the box to select **Individual Enrollment** to include non-Role enrollments. This option is commonly used when you have enrollments made to specific Learners. Select **Unenrolled (with Attempts)** to include **any** attempted Learning Element.

- **Learners:** Click **Show Search** to display the search options.

- Use this field to search for **specific Learners** within the selected Learning Roles.

- **Attempt Date Range:** Allows you to apply a Filter with a given Date Range.

- **Export Format:** Select a Report output option. Use **All Column Raw CSV (comma delimited)** for large data-sets.

- **Advanced Options:** Click the down arrow to display the Advanced Options.

- **Completion Status:** Select the Learning Element Status to include in the report. Options available allow you to choose to report LE's with **Complete**, **In Progress** and **Not Attempted** status.
- **Success Status:** Select which LE success status to include. Choices are **Passed**, **Failed** or **Any**.
- **Due Date Range:** Select the Date Range that will show in the report.
- **LE Attempts:** Select the type of Attempts to include in the report. You can include all Attempts by selecting the **All** option.
- **Include Archived Attempts:** By checking this box all attempt records will be included, even those that are older than the **expired** attempt record(s).

- **Include Enrollment from Parent Teams:** Include Enrollment from the Parent Teams of the selected Child Teams.
- **Include ID values in CSV:** Include ID values in the CSV export for the following columns: **Folder, LE, User, Attempt, User Created On Date** (only when selected).
- **Portals:** Select which portals the report data will be obtained from.

- **Display Columns:** Click the down arrow to display this section.

- **General Details:** Select the columns you want to be presented in the resulting report by checking the boxes next to them.
- **Profile Details:** Select up to 10 User´s Profile properties to be included in the report.

- Click **Generate Report** to view or download the report file according to the selected format chosen above. The report will display as shown below.

LE Utilization with Learner Detail

Date Range: Last 30 Days
Report Generated: 10/23/2017 11:14:02 AM

Refresh

Drag a column header and drop it here to group by that column.

User Name	Course	LE Name	Completion	Success	Score	Date	Time
Agray	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 PM
alsimmons	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 PM
Arideout	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 PM
Bdavidson	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 PM
Cdavidson	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 PM
Cjong	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 PM
Ddavidson	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 PM
izmadmin	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 PM
Jdavidson	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 PM
JDoe	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 PM
jfitz	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 PM
Jharris	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 PM
Jhartley	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 PM
Jdavidson	LMS Learner Training	LMS Learner Quiz	Complete	Passed	100%	2017.10.18	2:15:00 PM
JDoe	LMS Learner Training	LMS Learner Quiz	Complete	Passed	100%	2017.10.18	2:15:00 PM
jfitz	LMS Learner Training	LMS Learner Quiz	Complete	Passed	100%	2017.10.18	2:15:00 PM
Jharris	LMS Learner Training	LMS Learner Quiz	Complete	Passed	100%	2017.10.18	2:15:00 PM
Jhartley	LMS Learner Training	LMS Learner Quiz	Complete	Passed	100%	2017.10.18	2:15:00 PM
Jmontero	LMS Learner Training	LMS Learner Quiz	Complete	Passed	100%	2017.10.18	2:15:00 PM

|◄ ◄ 1 2 3 4 5 6 7 8 9 ► ►| Page Size: 100 ▾   816 items in 9 pages

Refresh

LE Utilization: Most Utilized

From the drop-down menu you may either select an existing Report type or create a new one.

- To create a new type of Report, select **Define New Report** from the drop-down menu.
- Click the **Continue** button.

Learning Content Utilization

Reports grouped by Folders and Learning Elements

Learning Folder with Learner Detail	< Define New Report > ▾	Continue
Learning Folder Summary with Folder Detail	< Define New Report > ▾	Continue
LE Utilization with Learner Detail	< Define New Report > ▾	Continue
LE Utilization Most Utilized	< Define New Report > ▾	Continue
Question Utilization with Learner Detail	< Define New Report > ▾	Continue

Scroll down to **Filters** and open the section if necessary clicking on the arrow.

- **Learning Catalog:** Select **All** to include all Learning Element Folders or use the **Selected** option to select specific Learning Element Folders.

- **Teams:** Select all Teams by checking box next to **All Members** or select specific Teams.

- **All Team Member Enrollment:** check box to include Enrollment from All Team Members.
- **Learning Role Enrollment:** to include all Roles check box next to **All Roles.** You may select specific Roles by checking the appropriate box.

- **Role Criteria:** Select to **Match All** or **Match Any**. With a **Match All** query, if you select multiple Roles/Learners, only those folders/Learning Elements that have **all** of the selected

Roles (and Learners) enrolled in them will be displayed in the report. With a **Match Any** query, if you select multiple Roles/Learners, all the folders/Learning Elements that have **any** of the selected Roles (and Learners) enrolled in them will be displayed in the report.

- **Role Status:** Check the box next to the applicable Role Status whether it be **Pending**, **Active** or **Expired.**
- **Additional Enrollment:** Check the box to select **Individual Enrollment** to include non-Role enrollments. This option is commonly used when you have enrollments made to specific Learners. Select **Unenrolled (with Attempts)** to include **any** attempted Learning Element.

- **Learners:** Click **Show Search** to display the search options.

- Use this field to search for **specific Learners** within the selected Learning Roles.

- **Attempt Date Range:** Allows you to apply a Filter with a given Date Range.

- **Export Format:** Select a Report output option. Use **All Column Raw CSV (comma delimited)** for large data-sets.

- **Advanced Options:** Click the down arrow to display the Advanced Options.

- **Completion Status:** Select the Learning Element Status to include in the report. Options available allow you to choose to report LE's with **Complete, In Progress** and **Not Attempted.**
- **Success Status:** Select which LE success status to include. Choices are **Passed**, **Failed** or **Any**.
- **Due Date Range:** Select the Date Range to be included in the report.
- **LE Attempts:** Select the type of Attempts to include in the report. You can include all Attempts by selecting the **All** option.
- **Include Archived Attempts:** By checking this box all attempt records will be included, even those that are older than the **expired** attempt record(s).

- **Include Enrollment from Parent Teams:** Include Enrollment from the Parent Teams of the selected Child Teams.

- **Display Columns:** Click the down arrow to show this section.

- **General Details:** Select the columns you want to be presented in the resulting report by checking the boxes next to them.

- Click **Generate Report** to view or download the report file according to the selected format chosen above. The report will display as shown below.

Question Utilization with Learner Detail

From the drop-down menu you may either select an existing Report type or create a new one.

- To create a new type of Report, select **Define New Report** from the drop-down menu.
- Click the **Continue** button.

Scroll down to **Filters** and open the section if necessary clicking on the arrow.

- **Learning Element Quiz or Survey:** Select the Learning Element Quiz or Survey you want to run the report on from the drop-down menu.

- **Teams:** Select all Teams by checking box next to **All Members** or select specific Teams.

- **All Team Member Enrollment:** check box to include Enrollment from All Team Members.
- **Learning Role Enrollment:** to include all Roles check box next to **All Roles.** You may select specific Roles by checking the appropriate box.

- **Role Criteria:** Select to **Match All** or **Match Any**. With a **Match All** query, if you select multiple Roles/Learners, only those folders/Learning Elements that have **all** of the selected

Roles (and Learners) enrolled in them will be displayed in the report. With a **Match Any** query, if you select multiple Roles/Learners, all the folders/Learning Elements that have **any** of the selected Roles (and Learners) enrolled in them will be displayed in the report.

- **Role Status:** Check the box next to the applicable Role Status whether it be **Pending**, **Active** or **Expired.**
- **Additional Enrollment:** Check the box to select **Individual Enrollment** to include non-Role enrollments. This option is commonly used when you have enrollments made to specific Learners. Select **Unenrolled (with Attempts)** to include **any** attempted Learning Element.

- **Learners:** Click **Show Search** to display the search options.

- Use this field to search for **specific Learners** within the selected Learning Roles.

- **Attempt Date Range:** Allows you to apply a Filter with a given Date Range.

- **Export Format:** Select a Report output option. Use **All Column Raw CSV (comma delimited)** for large data-sets.

- **Advanced Options:** Click the down arrow to show the Advanced Options.

- **LE Attempts:** Select the type of Attempts to include in the report. You can include all Attempts by selecting the **All** option.
- **Completion Status:** Select the Learning Element Status to include in the report. Options available allow you to choose to report LE's with **Complete** and **In Progress.**
- **Success Status:** Select which LE success status to include. Choices are **Passed**, **Failed** or **Any**.
- **Due Date Range:** Select the Date Range to show in the report.
- **Include Archived (LE Attempts):** By checking this box all attempt records will be included, even those that are older than the **expired** attempt record(s).
- **Include Enrollment from Parent Teams:** Include Enrollment from the Parent Teams of the selected Child Teams.

- **Display Columns:** Click the down arrow to expand this section.

- **Report Details:** Select the columns you want to be presented in the resulting report by checking the boxes next to them.
- **Profile Details:** Select up to 10 User´s Profile properties to be included in the report.

- Click **Generate Report** to view or download the report file according to the selected format chosen above. The report will display as show below.

Question Utilization: Learner Detail

Date Range: Last 30 Days
Report Generated: 1/11/2016 1:14:21 PM

Refresh

Drag a column header and drop it here to group by that column.

User Name	Question	Type	Answer	Response	Attempt	Correct	Incorrect	Date	Time
izmadmin	1 - Accord LMS Learner Experience:	choice	3 d All of the above	3 d All of the above	1	1		2016.01.11	1:07:44 PM
reguser	1 - Accord LMS Learner Experience:	choice	3 d All of the above	3 d All of the above	1	1		2016.01.11	12:59:23 PM
izmadmin	2 - The Pie Chart to the left of Learning Elements can indicate:	choice	3 d All of the above	3 d All of the above	1	1		2016.01.11	1:07:44 PM
reguser	2 - The Pie Chart to the left of Learning Elements can indicate:	choice	3 d All of the above	3 d All of the above	1	1		2016.01.11	12:59:23 PM
izmadmin	3 - Clicking on a Folder or Learning Element name will reveal more details about the content.	choice	1 True	1 True	1	1		2016.01.11	1:07:44 PM
reguser	3 - Clicking on a Folder or Learning Element name will reveal more details about the content.	choice	1 True	1 True	1	1		2016.01.11	12:59:23 PM
izmadmin	4 - A Learner can share ideas, pictures and videos with their Team Members and Learning Groups.	choice	1 True	1 True	1	1		2016.01.11	1:07:44 PM
reguser	4 - A Learner can share ideas, pictures and videos with their Team Members and Learning Groups.	choice	1 True	1 True	1	1		2016.01.11	12:59:23 PM

Page Size: 50

8 items in 1 pages

Refresh   Return

Report Definitions
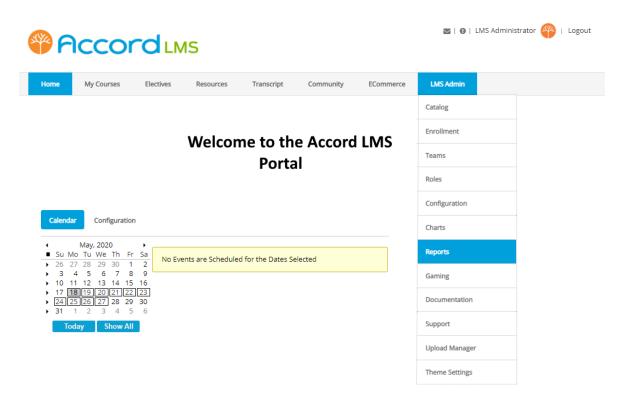
Creating Report Definitions allows you to store varied report filter settings for reports which are generated regularly. You can have certain types of Reports generated and delivered automatically at intervals of your choosing.

The varied Report Definitions may be utilized by other teams.

You can Define as many different types of Reports as you need.

Access Reports

- Navigate to **LMS Admin** tab > **Reports**.

Define New Report

The first step in creating a new Report Definition is to have the report filters configured.

To configure filters to properly define your new Report;

- Ensure the proper **Active Team** has been selected by using the associated dropdown menu; should more than one Active Team exist.
- The **Reports** tab should be the active tab.
- **Choose** the specific type of Report you want to create the definition for.

- Ensure **Define New Report** is showing in the dropdown menu.
- Click **Continue.**

If necessary click on the Filters heading to open this panel and select the settings as you desire when launching the report. After selecting the desired options, proceed to next step.

If necessary, click on the **Definitions** heading to open this panel.

- **Definition Name:** Specify a name for the new Report Definition in the field provided.
- **Definition Owner:** (read-only) Information display in this field states the Team that defined and owns this Definition (based on the Active Team). Only an LMS Admin from this Team can Edit or Delete this Definition.
- **Definition Description:** Provide a description for your reference to the Definition you are creating.
- **Team View Permissions:** Select which Teams can view and run this definition.
- Click **Create** to build and save this new definition.

Editing a Definition

Once Definitions have been created, they can be edited.

To Edit a Definition;

- Select the **definition** you want to edit from the dropdown list.
- Click **Continue.**

- If necessary, expand the **Definitions** panel by clicking on the heading.

- Perform any desired modifications.
- Click **Update** to save changes.

Copying a Definition

Once a certain Definition has been created, it can be copied to make it available to other Teams.

To copy a given Report Definition;

- Select the **definition** you want to copy from the dropdown list.
- Click **Continue.**

- If necessary, expand the **Definitions** panel by clicking on the heading.

- Any two reports cannot have the exact same name. Modify the name.
- **Team View Permissions** can be modified to make this Report Definition available to specific Teams.
- Click **Copy** to create copy.

Deleting a Definition

To Delete a Report Definition;

- Select the definition you want to delete from the dropdown list.
- Click **Continue.**

- If necessary, expand the **Definitions** panel by clicking on the heading.

- Click **Delete.**

Definitions

Select Definition or create a new one from your Filter settings. Share your Definition with other Teams. Schedule automatic Delivery.

Selected Definition: ⓘ   All Members Monthly

Definition Name: ⓘ   All Members Monthly

Definition Owner: ⓘ   All Members

Definition Description: ⓘ   All Members, All Learning Elements Monthly Report Definition

Team View Permissions: ⓘ   ▲ ☑ All Members
            ▶ ☐ New Employees

Delivery Schedule

No deliveries are scheduled.

Add New Delivery

Version History: ⓘ   Created: SuperUser Account on 16 June 2016 at 9:37 AM

            Updated: SuperUser Account on 16 June 2016 at 9:43 AM

Generate Report   **Update**   Copy   Delete

Delivery Schedule

Once Definitions have been created, the defined reports can be scheduled for delivery. The scheduler can be set up to generate and export the report (as a file) and email it to all selected LMS Admin Profiles.

Creating a Delivery

To create a new delivery Schedule;

- Select the definition you want to create the delivery schedule for from the dropdown list.
- Click **Continue.**

- Click **Add New Delivery.**

- Confirm that the Definition has been saved prior to editing deliveries.

- The **Delivery Schedule - Details** window will open.

- **Delivery Name:** Enter a name for the new delivery in the field provided.
- **Active:** Use this check-box to specify if the Delivery is Active or not. (checked by default)
- **Date Range:** Specify the Date Range of the Report by selecting one of the options available in the drop-down.
- **Export Format:** Specify the file format of the delivered report.
- **Frequency:** Specify the frequency of the delivery by entering the number of Day(s), Week(s) or Month(s).
- **Start Date:** This is, by default, the date the definition is created and it will be used to calculate when the report will be delivered taking into account the selected frequency. You can change this by clicking the calendar icon and choosing another date.
- **Time of Day:** Specify the Time of Day when you want this delivery to be executed. Use the drop-down to select from 00:00 23:30 (default value is 00:00)
- **Next Delivery Due:** (read-only) Shows when the date and time when the next Delivery is scheduled based on the selection made in **Frequency** field. This date is actually when the first report of the series, will be sent.

- **Deliver to Team LMS Admins:** Specify to which Teams this Scheduled Report will be delivered to by checking the boxes next to each Team. The Report to be delivered will be generated containing only those Learners that are member of the selected Team.
- **Deliver to Email Addresses:** Provide a comma separated list of email addresses this scheduled definition will be delivered to. The Report to be delivered will be generated for the Team that owns the Report Definition. The Definition Owner can be seen in the Definition Details section.
- **Quick-test Email Address:** Enter an email address to send a quick test of the current Report Definition. The report will be created using your current Active Team. In this example it will be for team All Members. To proceed with the test, click **Send**.

- Click **Update** to save the Delivery Schedule and return to the Definitions screen.

The Delivery will be listed under Delivery Schedule showing some details like Name, Active (check-box checked), Frequency, Next Delivery and Teams.

Editing a Delivery Schedule

To edit a delivery schedule:

- Click the **pencil** icon next to it.

- The **Delivery Schedule Details** window will open.

- Modify the desired items.
- Click **Update** to save the changes and return to Definitions screen.

Copy a Delivery Schedule

- Click the **pencil** icon next to it.

- The **Delivery Schedule Details** window will open.

- Give the copied Definition an **unique name**.

- Click **Copy.**

- A Copy of the Definition will be created with all the same settings as the original.

Deleting a Delivery Schedule

To delete a delivery:

- Click the **pencil** icon next to it.

- The **Delivery Schedule - Details** window will open.

- Click **Delete.**

- A confirmation dialog saying **Are you sure you want to delete this Report Delivery?** will display.
- Click **Yes.**

Confirm

Are you sure you want to Delete this Report Delivery?

[Yes] [No]

Activity Graph

The **Activity** tab provides a quick glimpse into how the Learning Elements are being utilized. The Activity tab may or may not be present depending on the Active Team.

To peruse Activity for the various Learning Elements;

- Wave mouse over the **LMS Admin** tab and click on **Reports**.

- Once in Reports, click on the **Activity** tab.

Information displayed in the **Activity** tab can be configured in the **Reports > Configuration** tab.

Reports - Configuration

The Reports Configuration tab allows you to configure the information to be displayed in the Activity tab.

- Wave over the **LMS Admin** tab and click on the **Reports** tab.

- Once inside the Reports tab, click on the **Configuration** tab.

- **Admin Module:** Select an LMS Admin Module for the source of the Learning Elements to be reported. If you change the LMS Admin Module, the Learning Elements will change as well but no data will be lost.
- **Show Tab Bar:** If unchecked no Tab Bar will be shown.
- **Available Tabs:** Select which tabs will be shown. This option only works if Show Tab Bar is active.
- **Activity Period:** Select the Dashboard Report Period from the options available in the drop-down.
- **Activity Count:** Select the maximum number of items listed for each Dashboard report.
- **Hide Active Team:** If checked this option hides the Active Team if there is only one Team available for the current User**.**
- Click **Update** to save changes.

Reports for Charts

Whether generating a new **Report Definition** or editing an existing **Report Definition** for the purposes of creating a **Chart**, ensure to always **Update**.

This will allow the **Chart** to display the data generated from your most recent settings.

Saving Changes

The Charts Module

The Charts Module - Introduction

The new **Accord LMS Chart module** provides instant snapshots of your most popular data. It can be added to any page, multiple times. It connects to the Reports module and pulls Report Definitions that are used as the Data Source.

How Charts Are Generated

It is important to know that all charts are created in conjunction with the **Reports Module** and a report will need to be defined, updated and generated, before a chart may be generated.

It is extremely important, that once any Report has been edited, to Update the Report, or else the edits will not reflect in the Chart you are attempting to generate. When in doubt - Update.

Please see the Reports section to learn how to generate reports.

- Run the Report Definition from the Report UI **first**, to make sure you have a good sample with meaningful data.
- When mapping the Report Columns to the Chart Data Types, be sure to match text to text data types and numeric to numeric data types.
- Text Report Columns can be used for both Data and Primary Grouping Chart Assignments.
- Primary Groupings are used for the Legend items.

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Versatile

Charts are HTML5 compliant and dynamically re-size for any device size. You can place any number of Chart modules on any page you want. Since the Chart displays are calculated in a scheduled task, they load immediately, no matter how many there are on a page.

Enterprise Support

Charts can display data for both internal and external Teams, even if hosted on additional portals. Also, the Chart display is generated for each possible LMS Admin Type, so Team Admin will only see data that is associated with their Team.

Additional Information

For a brief tutorial overview on Charts, please see this short video; https://www.youtube.com/watch?v=0ClvlpTsUZI.

Adding New Chart Modules

> ⚠️ **This article only applies to Accord LMS clients with self-hosted installations.**

Initial Set-Up

A **Chart Module** added to a page within the Accord LMS portal is necessary to create charts.

Your Accord LMS portal may have come with a **Chart Module** already installed.

Each chart requires a separate **Chart Module.** Example; five charts require five **Chart Modules**.

Adding a **Chart Module** requires portal admin permissions.

SaaS clients wanting to add a **Chart Module**, or clients requiring assistance, should contact **Accord LMS** support thru email at; support@accordlms.com.

Please follow the instructions below for Chart Module installation instructions.
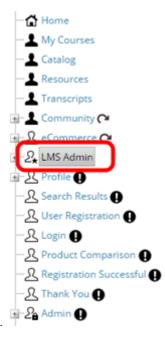
Create a New Page

A **Chart Module i**s commonly added to a new page within the LMS Admin tab, so that it may be conveniently accessed from there.
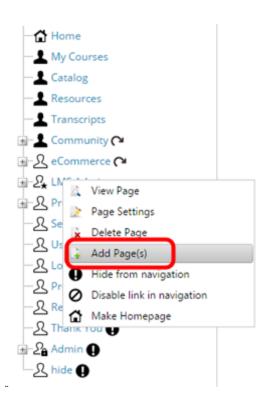
- While logged in with LMS Admin permissions, wave over the Admin tab in the upper DNN menu.
- Click on **Page Management**.

- Wave over **LMS Admin**.

- Right Click and select **Add Page**.

- Type **Charts** into the field provided, then click **Create Page(s)**.

Pages:

Charts

Create Page(s)

- From there you will be allowed to set various settings, although you may just select **Update Page**.
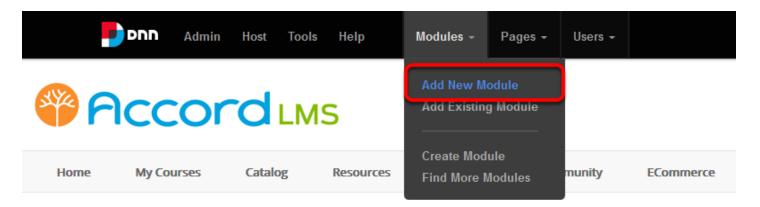
SEO ⌄

Metatags ⌄

Appearance ⌄

Link ⌄

Update Page   More Settings

Now **Charts** will display in your **LMS Admin** tab menu.
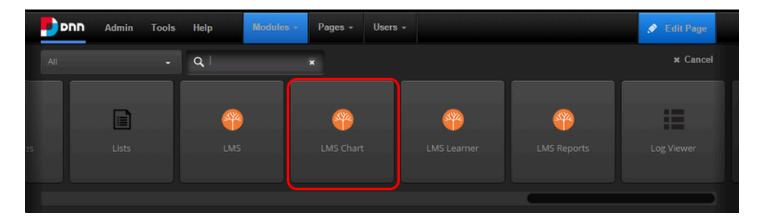
Add a New Chart Module

- Open the page where you choose to place a **Chart Module**.
- Scroll to the top DNN menu and wave over **Modules**.
- Select **Add New Module**.

- Scroll through the modules until you see the **LMS Chart Module**.
- Wave over the **LMS Chart Module** to highlight, then drag and drop into the main pane (a blue-hued rectangle) in the page below.

Initially, it will look like this, and will need to be **Configured** before a chart can display.

Charts - Configuration

- First, it is recommended that you generate a report from the **Report Definition** you choose to use for the chart.
- Look at it to ensure you have sensible, usable data.
- **Observe the type of data created as well as the column headings, to help determine how to populate the proper fields.**

Configuration of Charts

Once you have created and updated a **Report Definition**, you may configure a chart. If you make any changes to a pre-existing **Report Definition**, make sure to **Update** it. We provide an example here, using a **Report Definition** we created.

- Click **Configuration**.

Look at the Associated Generated Report

To aid yourself in determining which fields will need to be populated in the configuration, as well as determining what type of data to use for the various fields, look at a generated Report first. Note the type of data generated. Is it primarily textual or numerical? If numerical, the numerical type, sum, average etc., as well as the **Titles** of the columns generated in the report will be used in the chart.

User Name	Folder Name	LE Name	Completion	Success	Date	Time	Score
ArtieA	Ethics	Community Features	Complete		2015.07.02	3:09:27 PM	0%
ArtieA	Ethics	Learner Experience	Complete		2015.07.02	3:12:24 PM	0%
beckyt	Ethics	Community Features	Complete		2015.04.21	12:37:46 PM	0%
beckyt	Ethics	Enrollment Overview	Complete		2015.05.18	4:00:18 PM	0%
beckyt	Ethics	Learner Experience	Complete		2015.04.21	12:37:49 PM	0%
BobB	Ethics	Learner Experience	Complete		2015.02.26	11:55:34 AM	0%
CMyers	Ethics	Community Features	Complete		2015.04.21	12:36:50 PM	0%
CMyers	Ethics	Enrollment Overview	Complete		2015.05.18	4:01:38 PM	0%
CMyers	Ethics	Learner Experience	Complete		2015.04.21	12:36:55 PM	0%
EveE	Ethics	Community Features	Complete		2015.05.18	4:02:38 PM	0%
EveE	Ethics	Enrollment Overview	Complete		2015.05.18	4:03:21 PM	0%
EveE	Ethics	Learner Experience	Complete		2015.05.18	4:02:34 PM	0%
JManziel	Ethics	Community Features	Complete		2015.03.13	11:13:56 AM	0%
Imsadmin	Ethics	Community Features	Complete		2015.06.10	2:35:34 PM	0%
Paul G	Ethics	Community Features	Complete		2015.03.17	11:22:02 AM	0%
Paul G	Ethics	Learner Experience	Complete		2015.03.17	11:51:15 AM	0%
reguser	Ethics	Community Features	Complete		2015.02.25	4:22:36 PM	0%
reguser	Ethics	Learner Experience	Complete		2015.02.25	4:22:59 PM	0%
Steve	Ethics	Glossary of Terms	Complete		2014.12.30	6:35:56 PM	0%
Steve	Ethics	Community Features	Complete		2015.01.03	1:46:15 PM	0%
Steve	Ethics	Learner Experience	Complete		2014.12.30	7:13:04 PM	0%
testuser	Ethics	Learner Experience	Complete		2015.04.27	3:07:27 PM	0%

General Settings in Configuration

When using the **Chart Module** for the first time, the various configuration fields will be empty, with the drop-down menus un-selected. Certain subsequent fields may be added, removed or reconfigured, based on various selections.

- **Chart Name:** Select something relative to the chart. In our example, we use **Learner Activity With LE Detail**.
- **Report Type:** Use the drop-down menu to select the **Report Type** your chart will be generated from. Here we use, **Learner Activity/Transcript: LE Detail**.

- **Report Definition:** Use the drop-down menu to select the **Report Definition**. It is necessary to create this definition prior to generating a chart. See Reports. For our example here, we use **Learner Activity With LE Detail** which is a **Report Definition** we created.
- **Chart Type:** Use the drop-down menu to select from **Pie**, **Bar**, **Line**, **Multi-Bar** and **Multi-Line**. This will be determined by the type of chart you want as well as the type of data to be charted. For this example, we use **Multi-Bar**.
- **Chart Data Types:** Use the drop-down menu to select the **Chart Data Types** for the chart. Options available in the drop-down menu may vary depending on the **Chart Type** selected in the previous step. For this example, it is necessary to select **Text, Text or Date**.
- All fields with a red asterisk must be filled.

Report Columns-Chart Assignments

- In order to generate the Multi-Bar chart in this example, it is necessary to use the drop-down menu for **User Name** and select **Text - Data (Count) and Primary Grouping**.
- In the drop-down menu for **Folder Name**, we select **Text or Date - Secondary Grouping**.

Note: This may vary, depending on what Chart Type is selected as well as what type of data is generated by the associated Report Definition. Some charts will require only one populated field in this section, while others will require two.

X and Y Axis Custom Labels

Depending on the type of chart you choose, custom labels may be added to the X and Y axis of the chart. The X axis is the horizontal axis and the Y axis is the vertical axis. This does not apply to Pie charts.

- Click **Update and Regenerate**.

Messages

Immediately after clicking **Update and Regenerate**, the message below will show. Waiting briefly before refreshing the page will typically allow the desired chart to display. In cases where large amounts of data must be formatted, it may take a few minutes. If the message displays for more than several minutes after a few refresh attempts, there is usually a problem with one of the settings. Review the settings, make corrections and click **Update and Regenerate** again. There will likely be some trial and error involved.

Chart is being regenerated. Depending on the chart data, this could take some time. Please reload the chart later or review the 'LMS Chart Task' scheduler history.
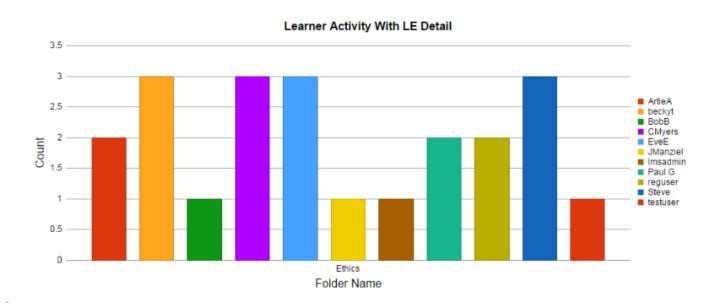
⊘ An Error Message can indicate several potential issues. There may have been improper drop-down menu selections or necessary fields left blank. Review settings and try again.

Message

Missing some required field, please review.

Ok

Chart Display

If the proper **Chart Configuration** fields were used in conjunction with your chosen **Report Definition**, the chart will display as desired.

Not all the Chart Types are appropriate for all the types of Report Definitions. Try to choose a chart type compatible with the type of data you wish to display.

Sample Charts

In this article we provide a sample Pie chart, Bar chart, Line chart, Multi-Bar chart and Multi-Line chart.

Before making a chart for the first time, please review **Charts -** Introduction, Adding New Chart Modules and Configuration sections.

It is important to note that the settings we use for our examples work only because of the specific type of **Report Definitions** used. For example, two separate **Multi-Bar** charts may require different settings, depending on the desired display and the particular data used to generate the report, which in turn generates the chart.

- Run the **Report Definition** from the Report UI **first**, to make sure you have a good sample with meaningful data.
- When mapping the Report Columns to the **Chart Data Types**, be sure to match text to text data types and numeric to numeric data types.
- Text Report Columns can be used for both Data and Primary Grouping Chart Assignments.
- Primary Groupings are used for the Legend items.

In this Article, we provide steps to generate the five types of charts. For your own charts, expect a given amount of trial and error with the various **Chart Configuration** and **Report Definition** settings.

IMPORTANT - How Charts Are Generated

It is important to know that all charts are created in conjunction with the **Reports Module** and a report will need to be defined and updated, before a chart may be generated.

Whether generating a new Report Definition or editing an existing Report Definition for the purposes of creating a Chart, ensure to always Update. This allows the Chart to display data generated from your most recent settings.

Please see the Reports section to learn how to generate reports.

Sample Pie Chart

Configuration of Chart

- Click/Tap on **Configuration**.

General Settings

- **Chart Name:** Select something relative to the chart. In our example, we use **Role Activity-Most Active**.
- **Report Type:** Use the drop-down menu to select the **Report Type** your chart will be generated from. Here we use, **Role Activity: Most Active**.
- **Report Definition:** Use the drop-down menu to select the **Report Definition**. It is necessary to create this definition prior to generating a chart. For this example we select, **Role Activity Most Active**, which is a definition we created.
- **Chart Type:** Use the drop-down menu to select **Pie**.
- **Chart Data Types:** Use the drop-down menu to select the **Chart Data Types** for the chart. Options available in the drop-down menu may vary depending on the **Chart Type** selected in the previous step. In our Pie chart example here, it is necessary to select **Text**.
- All fields with a red asterisk must be filled.

Report Columns-Chart Assignments

- In order to generate the Pie chart in this example, it is necessary to use the drop-down menu for **Role Name** and select **Text - Data (Count) and Primary Grouping**.

Note: This may vary, depending on what Chart Type is selected as well as what type of data is generated by the associated Report Definition. Some charts will require only one populated field in this section, while others will require two.

Update and Regenerate

- Click/Tap **Update and Regenerate**.

Pie Chart Display

Proper **Chart Configuration** used in conjunction with a suitable **Report Definition**, will allow your chart to display as desired.

Role Activity-Most Active

- West Team
- Unverified Users
- Safety Employees
- Registered Users
- Office Staff
- NO Regsion
- New Hire One Time Only
- New Distribitor Training
- LMS Learner Training
- LMS Admin Training 2
- LMS Admin Training
- Learner Support Group
- KC Fegion
- Interns
- Home Office
- Ethics
- DC Region
- Customer Service
- Community Learners
- C14
- C13
- All Staff Annual Training
- Acc_Training
- Acc_Downloads

Sample Bar Chart

Configuration of Chart

- Click/Tap on **Configuration**.

General Settings

- **Chart Name:** Select something relative to the chart. In our example, we use **Learner Activity Most Active**.
- **Report Type:** Use the drop-down menu to select the **Report Type** your chart will be generated from. Here we use, **Learner Activity: Most Active**.
- **Report Definition:** Use the drop-down menu to select your chosen **Report Definition**. It is necessary to create this definition prior to generating a chart. For our example here, we use **Most Active** which is a **Report Definition** we created.
- **Chart Type:** Use the drop-down menu to select **Bar**.

- **Chart Data Types:** Use the drop-down menu to select the **Chart Data Types** for the chart. Options available in the drop-down menu may vary depending on the **Chart Type** selected in the previous step. In our Bar chart example here, it is necessary to select **Text**.
- All fields with a red asterisk must be filled.

General Settings

Chart Name: ⓘ	Learner Activity Most Active
Report Type: * ⓘ	Learner Activity: Most Active ▾
Report Definition: * ⓘ	Most Active ▾
Chart Type: * ⓘ	Bar ▾
Chart Data Types: * ⓘ	Text ▾

Report Columns-Chart Assignments

- In order to generate the Bar chart in this example, it is necessary to use the drop-down menu for **User Name** and select **Text - Data (Count) and Primary Grouping**.

Note: This may vary, depending on what Chart Type is selected as well as what type of data is generated by the associated Report Definition. Some charts will require only one populated field in this section, while others will require two.

Report Columns	Chart Assignments
User Name	Text - Data (Count) and Primary Grouping ▾
First Name	▾
Last Name	▾
Email	▾
Attempt	▾
Complete	▾

X and Y Axis Custom Labels

You may choose to add custom labels to the X and Y axis of your chart. The X axis is the horizontal axis and the Y axis is the vertical axis.

X Axis Custom Label: ⓘ

Y Axis Custom Label: ⓘ

Update and Regenerate

- Click/Tap **Update and Regenerate**.

| Update | Update and Regenerate | Reset | Cancel |

Bar Chart Display
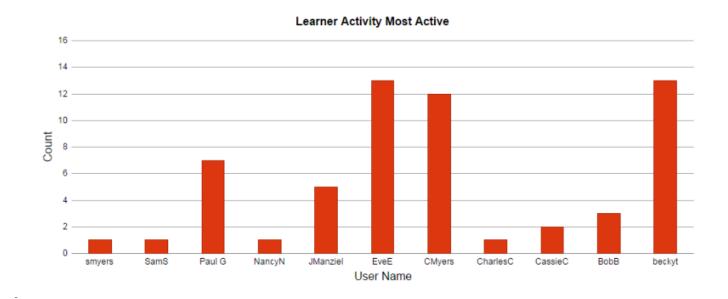
Proper **Chart Configuration** used in conjunction with a suitable **Report Definition**, will allow your chart to display as desired.

Sample Line Chart

Configuration of Chart

- Click/Tap on **Configuration**.

General Settings

- **Chart Name:** Select something relative to the chart. In our example, we use **Most Utilized Learning Elements**.
- **Report Type:** Use the drop-down menu to select the **Report Type** your chart will be generated from. Here we use, **LE Utilization: Most Utilized**.
- **Report Definition:** Use the drop-down menu to select your chosen **Report Definition**. It is necessary to create this definition prior to generating a chart. For our example here, we use **Most Utilized Learning Elements**, which is a **Report Definition** we created.
- **Chart Type:** Use the drop-down menu to select **Line**.
- **Chart Data Types:** Use the drop-down menu to select the **Chart Data Types** for the chart. Options available in the drop-down menu may vary depending on the **Chart Type** selected in the previous step. In our Line chart example here, it is necessary to select **Numeric Sum; Text or Date**.
- All fields with a red asterisk must be filled.

Report Columns-Chart Assignments

- In order to generate the Line chart in this example, it is necessary to use the drop-down menu for **LE Name** and select **Text or Date - Primary Grouping**.
- In the drop-down menu for **Attempt**, we select **Numeric Sum - Data**.

Note: This may vary, depending on what Chart Type is selected as well as what type of data is generated by the associated Report Definition. Some charts will require only one populated field in this section, while others will require two.

X and Y Axis Custom Labels

You may choose to add custom labels to the X and Y axis of your chart. The X axis is the horizontal axis and the Y axis is the vertical axis.

Update and Regenerate
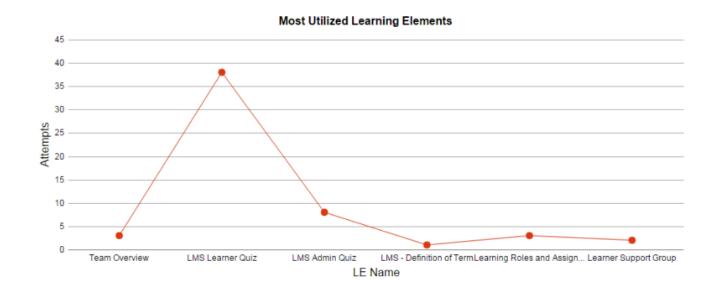
- Click/Tap **Update and Regenerate**.

Line Chart Display

Proper **Chart Configuration** used in conjunction with a suitable **Report Definition**, will allow your chart to display as desired.

Sample Multi-Bar Chart

Configuration of Chart

- Click/Tap on **Configuration**.

General Settings

- **Chart Name:** Select something relative to the chart. In our example, we use **Learner Activity With LE Detail**.
- **Report Type:** Use the drop-down menu to select the **Report Type** your chart will be generated from. Here we use, **Learner Activity/Transcript: LE Detail**.

- **Report Definition:** Use the drop-down menu to select your chosen **Report Definition**. It is necessary to create this definition prior to generating a chart. For our example here, we use **Learner Activity With LE Detail**, which is a **Report Definition** we created.
- **Chart Type:** Use the drop-down menu to select **Multi-Bar**.
- **Chart Data Types:** Use the drop-down menu to select the **Chart Data Types** for the chart. Options available in the drop-down menu may vary depending on the **Chart Type** selected in the previous step. In our Multi-Bar chart example here, it is necessary to select **Text; Text or Date**.
- All fields with a red asterisk must be filled.

General Settings

Chart Name:	Learner Activity With LE Detail
Report Type: *	Learner Activity/Transcript: LE Detail
Report Definition: *	Learner Activity With LE Detail
Chart Type: *	Multi Bar
Chart Data Types: *	Text; Text or Date

Report Columns-Chart Assignments

- In order to generate the Multi-Bar chart in this example, it is necessary to use the drop-down menu for **User Name** and select **Text - Data (Count) and Primary Grouping**.
- In the drop-down menu for **Folder Name**, we select **Text or Date - Secondary Grouping**.

Note: This may vary, depending on what Chart Type is selected as well as what type of data is generated by the associated Report Definition. Some charts will require only one populated field in this section, while others will require two.

X and Y Axis Custom Labels

You may choose to add custom labels to the X and Y axis of your chart. The X axis is the horizontal axis and the Y axis is the vertical axis.

Update and Regenerate

- Click/Tap **Update and Regenerate**.

Multi-Bar Chart Display

Proper **Chart Configuration** used in conjunction with a suitable **Report Definition**, will allow your chart to display as desired.

Learner Activity With LE Detail

Sample Multi-Line Chart

Configuration of Chart

- Click on **Configuration**.

General Settings

- **Chart Name:** Select something relative to the chart. In our example, we use **Learner Activity**.
- **Report Type:** Use the drop-down menu to select the **Report Type** your chart will be generated from. Here we use, **Learner Activity/Transcript: LE Detail**.
- **Report Definition:** Use the drop-down menu to select your chosen **Report Definition**. It is necessary to create this definition prior to generating a chart. For our example here, we use **Learner Activity With LE Detail**, which is a **Report Definition** we created.
- **Chart Type:** Use the drop-down menu to select **Multi-Line**.
- **Chart Data Types:** Use the drop-down menu to select the **Chart Data Types** for the chart. Options available in the drop-down menu may vary depending on the **Chart Type** selected

in the previous step. In our Multi-Line chart example here, it is necessary to select **Text; Text or Date**.

- All fields with a red asterisk must be filled.

Report Columns-Chart Assignments

- In order to generate the Multi-Line chart in this example, it is necessary to use the drop-down menu for **User Name** and select **Text - Data (Count) and Primary Grouping**.
- In the drop-down menu for **Folder Name**, we select **Text or Date - Secondary Grouping**.

Note: This may vary, depending on what Chart Type is selected as well as what type of data is generated by the associated Report Definition. Some charts will require only one populated field in this section, while others will require two.

X and Y Axis Custom Labels

You may choose to add custom labels to the X and Y axis of your chart. The X axis is the horizontal axis and the Y axis is the vertical axis.

X Axis Custom Label: ⓘ [_____]

Y Axis Custom Label: ⓘ [_____]

Update and Regenerate

- Click **Update and Regenerate**.

[Update] [**Update and Regenerate**] [Reset] [Cancel]

Multi-Line Chart Display

Proper **Chart Configuration** used in conjunction with a suitable **Report Definition**, will allow your chart to display as desired.

Advanced Options

- **LMS Module:** Select the LMS Admin Module for the source of Learning Elements. If you change the Admin Module, the Learning Elements will change as well but no data will be lost.
- **Enable Report Launch:** When selected, you can wave over a chart and click on it, to go directly to the associated Report Definition.
- **Report Module:** Select a Report Module to open Report Definition.
- **Hide Active Team:** Check this box to Hide Active Team drop down menu for all LMS Admins.
- **Date Rounding:** If a Date is Assigned, select how it should be rounded before being displayed on the Chart.
- **Data Sort Order:** Choose how to sort your data. Descending; largest to smallest, or Ascending; smallest to largest.
- **Maximum Legend Items:** Select the Maximum number of Legend (primary grouping) items. This may be necessary when the chart displays so much data that it is undecipherable. Leave blank for all items.
- **X Axis Label Rotation:** Select the % rotation of the X axis labels. (allow any number from 0 to 360 or blank).
- **Chart Colors:** Assign specific colors for up to the top 10 segments of Data.

- Click/Tap **Update** or **Update and Regenerate** to apply your changes.

Advanced Options ˄

LMS Module: * ⓘ	LMS Admin -> Interzoic Accord LMS - Manager (492) ▾
Enable Report Launch: ⓘ	☑
Report Module: * ⓘ	LMS Admin -> Reports -> Interzoic Accord LMS - Repc ▾
Hide Active Team: ⓘ	☑
Date Rounding: ⓘ	○ Day ● Month ○ Year
Data Sort Order: ⓘ	● Descending ○ Ascending
Maximum Legend Items: ⓘ	⬚
X Axis Label Rotation: ⓘ	⬚
Chart Colors: ⓘ	1 ▮▾ 6 ▮▾
	2 ▮▾ 7 ▮▾
	3 ▮▾ 8 ▮▾
	4 ▮▾ 9 ▮▾
	5 ▮▾ 10 ▮▾

[Update] [Update and Regenerate]   [Reset]   [Cancel]

Active Learner Impersonation

Impersonate an Active Learner

On occasion an LMS Admin may decide to impersonate an Active Learner.

This can be done to review a Learner's LMS display or to help a Learner complete an assignment.

To impersonate an Active Learner;

- Click on the **LMS Admin** tab.
- Click on the **My Courses** tab.
- Once in My Courses, click on it's **Configuration** tab.
- Go to **General Settings**.
- Check box for **Show Active Learner**.
- Scroll to bottom and click **Update**.

*Waving your mouse over information icons will display helpful tips.

⊗ **Important Note; the Active Learner Impersonation feature must always be specifically activated for each Admin Type prior.**

To Activate Learner Impersonation for any given LMS Admin Type;

- Ensure the proper **Active Team** is selected by using the associated dropdown menu; should more than one Active Team exist.
- Click on the **LMS Admin** tab.
- Click on the **Teams** tab.
- Click on the desired **Team** to open it's context menu.
- Select **LMS Admin Types** from it's menu.

- Click the **pencil icon** next to the LMS Admin Type you want activate Learner Impersonation for.

- Expand the **Feature Permission** section.
- Next to **Learner Features**, check box for **Active Learner Selection.**
- Scroll to bottom and click **Update** to save changes.

To use this feature:

- Navigate to **My courses.**

- Input a valid **username** in the **Active Learner** Field.
- Click the **circling arrow.**

Appendix

GoToWebinar and GoToTraining Integration

Overview

Citrix's GoToWebinar and **GoToTraining** training software enables your organization to present your learners with live instructor-led training courses and webinars. Both tools are focused on sharing exclusive knowledge and content for each student. The Accord LMS uses the advantages of both tools and integrates these tools to provide LMS Admin and instructors with all of the features provided by the GoToTraining or GoToWebinar applications.*

*Since the procedure to integrate both GoToTraining and GoToWebinar sessions into the Accord LMS are the same, we will use GoToWebinar as a reference for both.
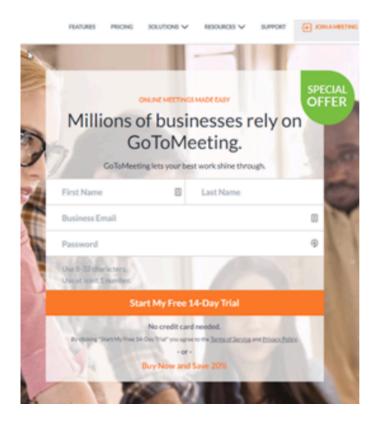
> ⊗ In order to use **GoToWebinar** or **GoToTraining**, you must have an active account for each. In order to use the apps as described below, you will also need an active developer account.

GoToWebinar User Account Setup

If you already have a user and developer account established for GoToWebinar, please continue to the **Add a New App** section. If you do not have these accounts, please follow the steps below carefully.

- Navigate to [GoToWebinar](#).
- Click on **Start for Free** and fill out the necessary information to begin a 14 day free trial.
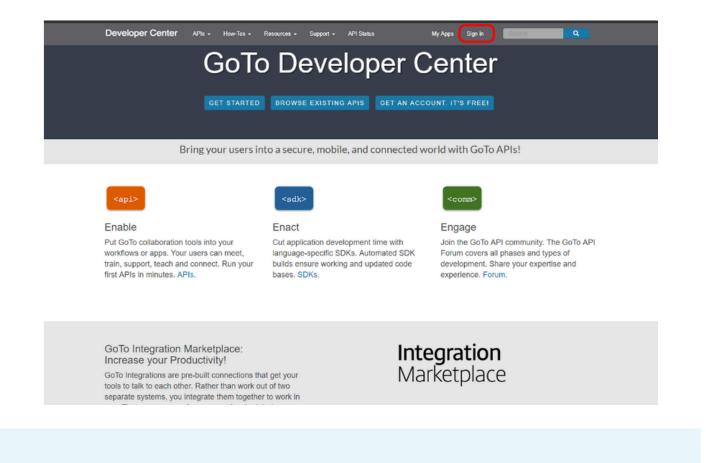
Please Note; As site information will occasionally update, images below are general representations and may vary somewhat from what you actually see while at the site.

Developer Account Setup

- Go to https://goto-developer.logmeininc.com/ and click on **Sign In**.

If you were already logged into GoToMeeting.com you might be automatically logged in, if not, login with the same account information that you used to register previously.

> ℹ️ One developer account will work for both GoToMeeting and GoToTraining. It is not necessary to have a separate developer account for each.

Add a New App

Once signed in, click on **My Apps**.

- Click **Add a new app**.

Fill in the **App Name** and **Description** fields, this information will display to LMS Admins when they link the App to their Accord LMS module. The **Application URL** must match your site or integration will not work.

- Click **Create App**.

⚠ You cannot use a GoToTraining app for GoToWebinar sessions or vice-versa. Make sure the Integration Application you are creating has the proper **Product API** selected.

Once the new app is created, check for the **Consumer Key**.

- Select your App name from the list (for this example we use Webinar demo).

The **Consumer Key** will display along with some other data. Only the Consumer Key is relevant at this stage. Please copy and paste this Consumer Key somewhere safe where it may be easily retrieved.

GoToWebinar VILT Location

Once the previous steps for the Citrix site are complete, create a Virtual Instructor Led Training (VILT) location for this webinar.

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Go to **LMS Admin** > **Configuration**
- Once in the Configuration page, click on **ILT Resources**.

- If necessary, click on the **Locations** heading to open this panel
- Click **Add New Location**.

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- Name this new location **GoToWebinar.** Add other descriptive terms as necessary to identify this GoToWebinar VILT session.
- **Status:** Marking **Active** will activate this session and allow this session to be displayed to Learners. Setting **Inactive** will hide session from Learners.
- In Location Type, select **Virtual - GoToWebinar**, from the dropdown menu.

The screen will refresh and a **Consumer Key** field will display.

- Paste the **Consumer Key** (copied from the previous step) in field provided.
- **Consumer Secret:** Input your GoToWebinar consumer secret.
- **Connection Status:** This will display the status of the connection between your app and your Location.
- Click on Link with your GoToWebinar account to link this Location with your account.
- **Max Learners:** If desired, input a maximum number of Learners which may attend this session.
- Check box for **GoTo Notifications** to send notifications to any registered Learners for this VILT webinar. LMS Admins will still maintain the ability to manage any GoToWebinar notifications from your GoToWebinar account.
- **Information URL:** Paste the URL to the location website or online map.
- **Owner:** Should there be more than one Active Team, while using the dropdown menu, select the Active Team which will be able to edit this location.
- **Team Availability:** Select which Teams can use this VILT location (mandatory-type information).
- **Description:** Using the field enter and optional description for this session. You may also enter tags into this filed which will help Learners locate whenever using the search function.
- Click **Create** to save details and create this session.

A **Confirm Save Location** dialog box will display saying; **Linking requires for your Location to be saved. If choosing to proceed, your VILT Location will save using the current settings**.

- If satisfied with your settings, click **Yes**.

You will be prompted to authorize the Integration Application to access your GoToWebinar account (profile data). This allows the application to register your Learners for your GoToWebinar session on your behalf.

- Click **Allow**.

Set Utilization Tracking Details for GoToWebinar Polls

To encourage Learner participation in a given GoToWebinar VILT Learning Element, an LMS Admin has the option to set **Utilization Tracking** to track as **'Complete'** only if the Learner answers the GoToWebinar poll questions.

To set Utilization Tracking to track 'Complete' only if Learner answers all GoToWebinar Poll questions;

- Ensure the proper **Active Team** is selected; should there be more than one Active Team.
- Select the **LMS Admin** tab.
- Select the **Catalog** tab.
- Click on the VILT Learning Element you wish to set Utilization Tracking to open it's context menu.
- Select **LE Sessions** from menu.

Select the VILT Session you desire to set Utilization Tracking for and click on it's adjacent pencil icon to edit.

- Using the dropdown menu for Utilization Tracking, select **"Complete" on All poll questions answered**.
- Click **Update** to save changes.
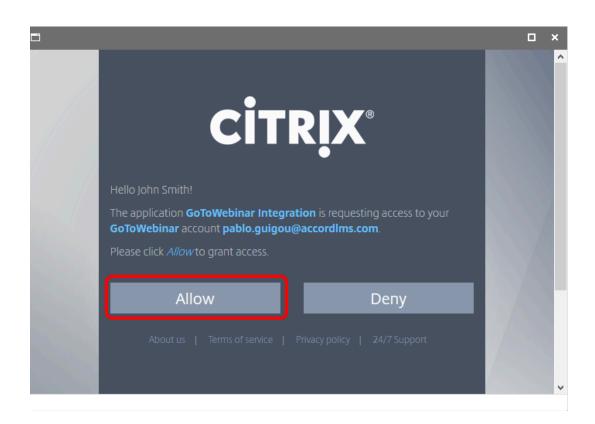
Considerations of Utilization Tracking;

When using the setting **'Complete on All poll questions answered'** option, until a Learner completes all poll questions, the GoToWebinar Learning Element will track and report as 'In Progress'.

A 'Complete' status will not update immediately, but only upon a scheduled update task.

Please note; the option to **'Complete on All poll questions answered'**, will only apply for GoToWebinar events, not for GoToTraining or GoToMeeting events.

> ⚠ Use a unique account to facilitate a proper link for each location. Ensure the account you are using is not already linked to another location. This will divert link errors or failures.

A message will display stating; **Location has been linked correctly. Your location will reload in 3 seconds.**
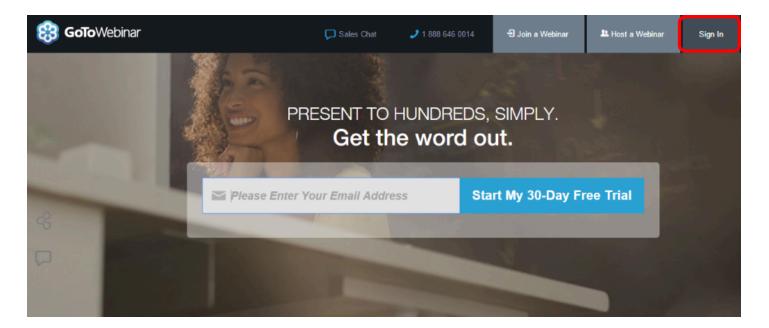
Location has been linked correctly, your location will reload in 3 seconds

The **Connection Status** field will update and display that your application will remain connected and active for a period of approximately 30 days.
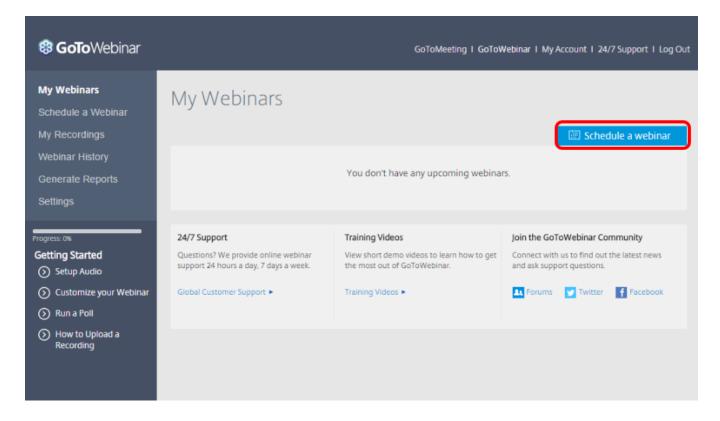
Create a Webinar

Navigate to; https://www.gotomeeting.com/webinar and **Sign In** using your registered user account credentials.

- Click on **Schedule a webinar**.

Fill in the webinar details including; **Title**, **Description**, **Type**, **Start Date**, **Start Time**, **End Time**, **Time Zone** and **Language**.

- Click **Schedule**

- Immediately after the slash following webinar, copy the numerical digits of the **Browser URL**, not the Registration URL.

Create a New Session

To create a new VILT session;

- Ensure the proper **Active Team** is selected by using the associated dropdown menu; should more than one Active Team.
- Navigate to **LMS Admin** > **Catalog**
- Click on an ILT Learning Element and select **LE Sessions** from it's context menu.

- Click **Add New Session**.

- Fill your session fields and select the **GoToWebinar** location you created from the dropdown menu. An instructor must be selected from it's associated dropdown menu.

A new field will appear under the Location dropdown menu, asking for the GoToWebinar **Registration URL Key**.

- **Paste** digits copied from the Browser's URL (as mentioned above).

- Click **Update**.

Your new GoToWebinar session is ready to use.

ℹ️ You can use the same GoToWebinar location for all of your GoToWebinar ILT sessions.

ℹ️ Each Location can only be associated with a single GoToWebinar Account. If you would like to support multiple GoToWebinar accounts, it will be necessary to create a unique location for each account.

❗ You must create different Locations and Integration Applications for **GoToTraining** and **GoToWebinar**. Due to limitations in the APIs, they are not interchangeable.

Support & Resources

Support via Support Portal

Submit your technical tickets via our support portal. Monitor the ticket progress and view all ticket status.

https://support.accordlms.com

Support via Email

Email support access for technical questions. Email submission will automatically create new ticket in support portal.

support@accordlms.com

Blog

Complementary information can be found in our blog. Keep up to date on new enhancements and configuration tips. Guest contributors bring news and analysis of eLearning trends.

http://www.accordlms.com/blog

Video Tutorials

Up to date and to the point video tutorials demonstrate how to easily deploy powerful training solutions that meet the needs of your company.

http://www.accordlms.com/resources/video-tutorials

Product Webinars

Accord webinars help you get the most from your LMS with overviews of new technology and in depth training. Register to any upcoming session or review the recordings of any pass session.

https://www.accordlms.com/resources/webinars

Documentation and Resources

Language Packs for multi-language installations, White Papers, Demo SCORM content and Resources can be found in this page.

http://www.accordlms.com/resources/documentation

Release Notes

Release Notes for each new version of the Accord LMS including new features and enhancements are located in the following address:

http://www.accordlms.com/resources/release-notes

SCORM Specifications

Certified Authoring Tools

The Accord LMS is SCORM 1.2 and SCORM 2004 compliant for Shareable Content Objects (SCO) and can utilize any content produced by a modern SCORM authoring tool. This list below is just a sample of the most popular tools.

Authoring Tool	Type	Notes
Adobe - Captivate	Presentation and Quiz	Tested and Certified to work with Accord LMS
Articulate - Engage	Presentation	Tested and Certified to work with Accord LMS
Articulate - Presenter	Presentation and Quiz	Tested and Certified to work with Accord LMS
Articulate - Quizmaker	Quiz	Tested and Certified to work with Accord LMS
Articulate - Storyline	Presentation and Quiz	Tested and Certified to work with Accord LMS
Composica	Presentation	Tested and Certified to work with Accord LMS
CourseLab	Presentation and Quiz	Tested and Certified to work with Accord LMS
Dominknow - Claro	Presentation and Quiz	Tested and Certified to work with Accord LMS
iSpring - Presenter	Presentation	Tested and Certified to work with Accord LMS
iSpring - QuizMaker	Quiz	Tested and Certified to work with Accord LMS
Lectora	Presentation and Quiz	Tested and Certified to work with Accord LMS
MOS - Solo	Presentation and Quiz	Tested and Certified to work with Accord LMS
SumTotal - ToolBook	Presentation and Quiz	Tested and Certified to work with Accord LMS
ViewletBuilder	Presentation and Quiz	Tested and Certified to work with Accord LMS
ViewletQuiz	Quiz	Tested and Certified to work with Accord LMS

Compliance

SCORM is a communications protocol, a set of specific messages that can be passed, between a Shareable Content Object (SCO) and the LMS.

Most SCORM implementations are fairly complete in terms of basic grading. For example, all SCOs provide enough information to understand both the discrete answer score and the cumulative score. Most authoring tools will produce SCORM quizzes that provide both the Question text and the Answer text. Accord recommends you user test a trial version of any authoring tool to make sure it is reporting all the information you need to evaluate both your learners and the content you are creating.

There is an aspect of SCORM compliance that concerns **curriculum** and SCO **sequencing**. The Accord LMS does not support multiple SCO within a single package. Instead it provides curriculum and sequencing features within the Accord LMS catalog. This results in more granular and independent SCOs with greater re-purposing value.

The best way to test the performance of your authoring tools and the output SCO is to utilize the free SCORM conformance testing and reporting tool at https://cloud.scorm.com. Create a free account and upload your SCO.

Success and Completion Status

SCORM has two fields to gauge SCO result status: Success and Completion. The Accord LMS provides the ability to customize Learning Element Types. Learning Element Types support the following options:

- **Success over Completion** (default)
- **Completion and Success** (show both statuses)
- **Completion Only**
- **Success Only**

The Accord LMS can report these values separately, or as a merged, single status using the **Success over Completion** logic:

- If there is Success status, show it.
- If there is no Success status and there is Completion status, show Completion status.
- If there is no Success or Completion status, show **Not Started**.

Most eLearning SCO do not report Success status, so we only show Completion status. The default setting of **Success over Completion** is therefore appropriate for most presentations and quizzes.

Resuming Incomplete Quizzes

Some Sharable Content Objects (SCO) provides Learners the option to resume a quiz that was attempted earlier but incomplete. This is how the process works: When a Learner closes a SCO, the SCO reports to the LMS whether it was completed or not AND sends all the question and answer (Q&A) data to the LMS. The LMS stores the Q&A data to its database. The next time the Learner launches the same SCO, the LMS has the intelligence to inform the SCO to **resume** and also sends the SCO all the previous Q&A data. The SCO may ask the Learner if they want to **resume** or **start again**; force the SCO to restart at the beginning, or force the SCO to resume.

What happens next varies with the different authorware tools. Some examples:

Articulate

- Start Again - The SCO starts at the beginning, but all of the previous Q&A are restored. The final result set is now **mixed** and corrupted.
- Resume - The SCO resumes at the correct location with the previous Q&A restored. This is appropriate behavior.
- Note Articulate 09 has output setting to allow the LMS to force a resume. Please refer to the SCO Publishing Options section below.

Composica

- Start Again - The SCO starts at the beginning. None of the previous Q&A are restored. This is appropriate behavior.
- Resume - The SCO resumes at the correct location and the previous Q&A are restored internal to the SCO but not in the Learner UI. Although the Learner cannot see their old answers, the final reporting works fine.

Lectora

- Start Again - The SCO starts at the beginning. None of the previous Q&A are restored. This is appropriate behavior.
- Resume - The SCO resumes at the correct location but the previous Q&A are not restored internal to the SCO or in the Learner UI. The final result set is now "mixed" and corrupted.

To address the different ways SCO handle resuming, the LMS Admin >> Configuration >> Learning Element Type settings include an option to **No Resume**. This option causes the LMS to disallow Q&A restoration and forces all incomplete quizzes to restart at the beginning.

Updating the 'Contact Us' Form

Editing the 'Contact Us' information.

- Go to **Community > Contact Us**

- When the 'Contact Us' form page opens, wave over **Edit Page** in the upper right hand section and select **Edit This Page**.

- Select **Setup completion events after the users has submitted the form**.

- In the dropdown menu for **Select Event** choose **EmailNotification(Email)**.

- Scroll down to see the fields where you can change the necessary information.

Event Actions: ℹ

Email Message: ℹ

From Email Address: ℹ `demo.test@accordlms.com`

Generate Results Template

Message

Generate Full Results Template Parameters

From Email Name: ℹ `Contact Us [Company Name]`

Email To: ℹ `demo.test@accordlms.com`

Include these parameters below in your email to, subject, or email message. These parameters will be replaced with the email is sent.

```
$(FirstName)
$(FirstName_FullRes
$(FirstName)
$(FirstName_FullRes
$(LastName)
$(LastName_FullRes
$(Email)
$(Email_FullResults)
$(JobTitle)
$(JobTitle_FullResults
$(Comp)
$(Comp_FullResults)
$(Workp)
$(Workp_FullResults)
$(Message)
$(Message_FullResul
```

Email Subject: ℹ `Contact Us - $(FirstName) $(LastName)`

Advanced Email Properties ⌄

☐ Basic Text Box ● Rich Text Editor ℹ

Paragraph Style   Custom Links

Portal: $(PortalName)
First Name: $(FirstName)
Last Name: $(LastName)
Job Title: $(JobTitle)
Company: $(Comp)
Phone: $(Workp)
Email: $(Email)
Message: $(Message)

Design   HTML   Preview   Words: 19   Characters: 137

Update Event **Delete Event**

Learner UI Templates

The Accord LMS provides token / template support for the Learning Element Catalog views.

The Catalog can be customized to your specifications using whatever font, backgrounds, images and layout you need to achieve your desired presentation. Default templates are provided for all of the existing traditional/default presentations. These default templates may be updated over time and each upgrade to the Accord LMS will copy over the existing files. If you want to customize any of the default templates, be sure to copy the template files to a new directory with a unique name. Clients can create their own templates or work with the Accord LMS team.

In this article, we will show you how to create a new template for the layout shown below.

Templates

The root /Template folder is located under /WWWRoot/DesktopModules/Interzoic.AccordLMS. Each of the /Subfolders contains a full set of template files. The /Subfolder name becomes the "name" of the aggregated template files. You will need to use an FTP client to create and edit your templates.

Template Pane Layout

The Accord LMS uses a pane layout for its Catalog view templates. Any of the panes can be used or not. If there is no content in a pane or its associated template file, the pane will simply collapse and not occupy any space on the Catalog view rendered to the user. Each pane has a

corresponding template file with the same name except for the Content pane which uses the FolderNode.htm and LENode.htm files.

Template Files

The Template files contain the HTML layout which describes your Catalog view. Tokens are placed into the HTML which are dynamically replaced at run time. If any of the template files are missing, the content for the associated pane will be empty and collapsed.

- **Header.htm** – defines the header of the Catalog view. The default TreeView templates use this for the column headers.
- **Footer.htm** – defines the footer of the Catalog view.
- **Top.htm** – defines the top of the Catalog view. In the default ListView templates the Section Name and QuickLink Tokens are included in this file.
- **Bottom.htm** – defines the bottom of the Catalog view.
- **Left.htm** – defines the left of the Catalog view. In some of the default ListView templates the navigational Breadcrumb tokens are included in this file.
- **Right.htm** – defines the right of the Catalog view.
- **FolderNode.htm** - defines the layout for the Folders used in the Content pane of the Catalog view.
- **CurrentFolderNode.htm** - defines the layout for the Folders used in the Content pane of the Catalog view if there is something present in the file and provided a parent folder is found.
- **LENode.htm** - defines the layout for the Learning Elements used in the Content pane of the Catalog view.
- **QuickLinks.css** - defines the CSS used by the Quick Links in the ListView templates.
- **Template.css** – allows CSS customization for the Catalog TreeGrid. This file has precedence over the default CSS that ships with the Accord LMS. Colors for mouse over, selected, header colors, failure and success font can all be easily defined.

Available Header, Footer, Top and Bottom Tokens

[EXPANDCOLLAPSE] – master expand/collapse control

[LISTALL] - link text to restore "List all Learning Events" after displaying Search results

[SEARCH] – Search text box and submit button

[SELECT] – Select All, Deselect All control (checkbox)

Available Label Tokens (localizable from associated RESX files)

[DURATIONTITLE] - Duration

[IFEMPTY] [/IFEMPTY] - Displays the content included between them if the Learner Treeview/ Listview is empty.

[IFNOTEMPTY] [/IFNOTEMPTY] - Displays the content included between them if the Learner Treeview/Listview is not empty.

[IFSEARCH] - Message displayed when a search is performed.

[IFNOTSEARCH] - Message displayed when NO search is performed.

[LEARNERCATALOGMESSAGE] - Message at top of Learner > Catalog page: *"Select Learning Events for enrollment, click on Icon for details."*

[LEARNERMESSAGE] - Message at top of Learner > My Courses and Enrollment pages: *"Click on Learning Element link to open."*

[LETITLE] - *"Learning Element"*.

[MANAGERENROLLMENTMESSAGE] - Message at top of Manager > Enrollment page: *"Select Learning Elements to enroll or drop from Roles/Users. Click on Icon for details."*

[MANAGERMESSAGE] - Message at top of Manager > Catalog page: *"Right click for Context Menu, drag and drop to organize, click on Icon for details."*

[STATUSTITLE] - *"Status"*.

[TEMPLATEPATH] - Returns the relative path for the template in use. Example of usage: LoadExCanvas('[TEMPLATEPATH]').

Available Top.htm Tokens

[IFDETAILS] - Displays Folder Details.

[IFNOTDETAILS] - Displays when no details are available.

[PARENTFOLDERPLAINTEXTDETAILS] - Displays folder details in plain text. Only the first 255 characters are shown.

[PARENTFOLDERHTMLDETAILS] - Shows Folder details when the *"View More"* link is clicked.

[PARENTFOLDERCOMPLETION] - Shows Folder percentage completed.

[IFICONCUSTOM] - Displays customized Folder Icon.

[IFNOTICONCUSTOM] - Displays Default Folder Icon.

[ICONCUSTOMURL] - Shows the URL for Customized icon.

[IFPARENTFOLDERDETAILVIEWMORE] - Displays the *"View More"* link.

[IFPARENTFOLDERCOMPLETED] - Displays if folder attempt is completed.

[IFNOTPARENTFOLDERCOMPLETED] - Displays if folder attempt is not completed.

[SESSIONICONPATH] - Shows the Sessions Home Icon (when Default.Learner.Icon.Session Template applied).

[MYPLANARCHIVEICONPATH] - Shows the My Courses Home Icon (when Default.Learner.Icon.MyPlan Template applied).

[CATALOGICONPATH] - Shows the Catalog Home Icon (when Default.Learner.Icon.Catalog Template applied).

Available Folder Node Tokens

[DEPTHREL] - The depth of the current node, relative to the top folder.

[DETAILS] - From Folder Details.

[EXPANDCOLLAPSE] – Expand/collapse control.

[FOLDERFLATICONSMALL] - Renders the Small Flat icon for Folders.

[FOLDERFLATICONMEDIUM] - Renders the Medium Flat icon for Folders.

[FOLDERFLATICONLARGE] - Renders the Large Flat icon for Folders.

[FOLDERFLATICONXLARGE] - Renders the Extra Large Flat icon for Folders.

[FOLDERICONSMALL] – Renders the Small icon for Folders (formerly called [ICON]).

[FOLDERICONMEDIUM] – Renders the Medium icon for Folders.

[FOLDERICONLARGE] – Renders the Large icon for Folders.

[FOLDERICONXLARGE] – Renders the X-Large icon for Folders.

[FOLDERICONWITHTIP] - Folder Icon with Folder Details tool tip (formerly called [ICONWITHTIP]).

[FOLDERICONMEDIUMWITHTIP] – Renders the Medium icon for Folders.

[FOLDERICONLARGEWITHTIP] – Renders the Large icon for Folders.

[FOLDERICONXLARGEWITHTIP] – Renders the X-Large icon for Folders.

[FOLDERID] - Displays the GUID of a folder.

[FOLDERLOCALID] - Folder's table auto-numbering. Folder creation correlative ID.

[FOLDEROPEN] - Javascript to open a folder. Example of usage, onclick="[FOLDEROPEN]".

[FOLDERREFERENCE1] - Reference 1 folder details field.

[FOLDERREFERENCE2] - Reference 2 folder details field.

[FOLDERSCORE%] - Shows the folder score percentage.

[IFICONCUSTOM] - Displays the customized Folder Icon.

[IFFOLDEREXPANDED] - Shows LE and Child Folders when Learner view is set to expanded.

[IFNOTFOLDEREXPANDED] - If the folder type has not set the expanded property.

[IFHIDEFOLDER] - If the expanded the folder is not shown, only content will be shown.

[IFNOTHIDEFOLDER] - When the folder does not have the hide property set.

[IFFOLDERSCORE] - Shows if folder has score

[IFNOTICONCUSTOM] - Displays Default Folder Icon.

[ICONCUSTOMURL] - Shows the URL for the Customized icon.

[IFTRANSCRIPTENABLED][/IFTRANSCRIPTENABLED] - All content within this tag will present if Transcript is enabled for a folder.

[IFNOTTABTRANSCRIPTENABLED][/IFNOTTABTRANSCRIPTENABLED] - All content within this tag will be present if Transcript is NOT enable for a folder.

[IFNOTHASCHILDWITHTRANSCRIPTENABLED][/IFNOTHASCHILDWITHTRANSCRIPTENABLED] - All content within this tag will be present if any child folder has Transcript disabled.

[IFHASCHILDWITHTRANSCRIPTENABLED][/IFHASCHILDWITHTRANSCRIPTENABLED] - All content within this tag will be present if any child folder has Transcript enabled.

[IFDETAILS][/IFDETAILS] - Display Folder Details.

[IFNOTDETAILS][/IFNOTDETAILS] - Displays No Details Available.

[LECOMPLETED] – All Completed LE in Folder and Subfolders.

[LETOTAL] – All LE in Folder and Subfolders

[LETRACKED] – All Tracked LE in Folder and Subfolders.

[NAME] - from Folder Details.

[MODULEID] - Learner Module ID.

[PARENTFOLDERSCORE%] - Shows the parent folder score percentage.

[TRANSCRIPTLAUNCH] - Transcript Report icon.

[TRANSCRIPTACT.TRANSCRIPTINACT] - ACT or INACT displays depending on Transcript status.

Available Learning Element Node Tokens (General)

[ACTIVITYNAME] - Displays Activity Name. This Token only works when included in [WHILEACTIVITIES] Token.

[ACTIVITYDESC] - Displays Activity Description. This Token only works when included in [WHILEACTIVITIES] Token.

[ACTIVITYPOINTS] - Displays Activity Points.This Token only works when included in [WHILEACTIVITIES] Token.

[CONDITIONSWITHTIP] – Conditions flag (red or green in learner, always red in manager) with tooltips. Tool Tips in Learner shows actual Satisfied and Unsatisfied Conditions for the Registered User, in Manager shows a list of all conditions associated with the LE.

[CLICKTRANSCRIPTREPORTMANAGER][/CLICKTRANSCRIPTREPORTMANAGER] - Learner Transcripts enabled for this Folder text string.

[CONDITIONSSMALLWITHTIP] – Small Conditions flag with Tool Tips.

[CONDITIONSMEDIUMWITHTIP] - Medium Conditions flag with Tool Tips.

[CONDITIONSLARGEWITHTIP] - Large Conditions flag with Tool Tips.

[CONDITIONSXLARGEWITHTIP] – X-Large Conditions flag with Tool Tips.

[CONDITIONSICONSMALL] - Small Conditions flag (Icon only) without Tips.

[CONDITIONSICONMEDIUM] - Medium Conditions flag (Icon only) without Tips.

[CONDITIONSICONLARGE] - Large Conditions flag (Icon only) without Tips.

[CONDITIONSICONXLARGE] - X-Large Conditions flag (Icon only) without Tips.

[DEPTHREL] - the depth of the current node, relative to the top folder.

[DETAILS] - from LE Details.

[DURATION] - from LE Details. If attempted (Learner only) shows actual duration reported by either the LE or LMS (selectable).

[EA:EA Name:Start:End] - token that displays Education Activities Name in PDF Template. Optionally, you can indicate a Start and End date filter for the EA.

[ENROLLICONSMALL] - Small plus (+) sign icon displayed in the Leaner's Catalog.

[ENROLLICONMEDIUM] - Medium plus (+) sign icon displayed in the Leaner's Catalog.

[ENROLLICONLARGE] - Large plus (+) sign icon displayed in the Leaner's Catalog.

[ENROLLICONXLARGE] - X-Large plus (+) sign icon displayed in the Leaner's Catalog.

[FLAG] - sets Flag status to true (default is not true). When set, allows conditional processing later in the Template.

[NOTFLAG] - sets Flag status to false (default). When set, allows conditional processing later in the Template.

[ICONMEDIUM] – from LE Type, renders the medium icon image.

[ICONMEDIUMURL] – from LE Type, URL to the medium icon.

[ICONMEDIUMWITHTIP] – from LE Type, renders the medium icon image with LE Details Tool Tip.

[ICONSMALL] – from LE Type, renders the small icon image.

[ICONSMALLURL] – from LE Type, URL to the small icon.

[ICONSMALLWITHTIP] – from LE Type, renders the small icon image with LE Details Tool Tip.

[ICONLARGE] – from LE Type, renders the large icon image.

[ICONLARGEURL] – from LE Type, URL to the Large icon.

[ICONLARGEWITHTIPS] – from LE Type, renders the Large icon image with LE Details Tool Tip.

[ICONXLARGE] – from LE Type, renders the X-large icon image.

[ICONXLARGEURL] – from LE Type, URL to the X-Large icon.

[ICONXLARGEWITHTIPS] – from LE Type, renders the X-Large icon image with LE Details Tool Tip.

[IFACTIVITIES] - Displays Learning Element Activities

[IFNOTACTIVITIES] - Displays No Activities Available.

[IFDETAILS][/IFDETAILS] - Display Learning Element Details.

[IFNOTDETAILS][/IFNOTDETAILS] - Displays No Details Available

[IFFLAG][/IFFLAG] - all content within this tag will be present if flag is set.

[IFHASATTEMPT][/IFHASATTEMPT] - displays the content only when LE has attempts.

[IFHASNOTATTEMPT][/IFHASNOTATTEMPT] - displays the content only if LE has no attempts.

[IFLISTVIEW] - all content within this tag will present is Learner ListView is active.

[IFNOTLISTVIEW] - all content within this tag will be present is Learner ListView is NOT active.

[IFLOADONDEMAND] - all content within this tag will be present if Load OnDemand is active for Learner Catalog and Manager Module.

[IFNOTLOADONDEMAND] - all content within this tag will be present if Tree Grid view is active for Manager Module.

[IFNOTFLAG][/IFNOTFLAG] - all content within this tag will present if flag NOT set.

[IFLETYPE:*Name of LE Type*][/IFLETYPE:*Name of LE Type*] - all content within this tag will present if LE Type Name.

[IFNOTLETYPE:*Name of LE Type*][/IFNOTLETYPE:*Name of LE Type*] - all content within this tag will present if NOT LE Type Name.

[IFSCOREGREATERTHANZERO] [/IFSCOREGREATERTHANZERO] - Shows Score ONLY if greater than zero.

[IFVALIDFOLDERCOMPLETIONSTATUS] - When there is current status, for example, expired enrollment.

[IFNOTVALIDFOLDERCOMPLETIONSTATUS] - When there is no current status, for example, expired enrollment.

[LELAUNCH] - onClick support to launch Learning Event.

[LEREFERENCE] - Reference field from LE Details.

[LEID] - Learning Element ID.

[LELOCALID] - Learning Element local ID. Learning Element correlative creation ID.

[LEEU] - Learning Element Education Units.

[NAME] - from LE Details.

[RESX][/RESX] - Searches and replaces the text within this tag in the template file.

[SUMMARY] - from LE Details.

[WHILEACTIVITIES][/WHILEACTIVITIES] - All Tokens within these tags will be display if LE has Activities.

Available Learning Element Node Tokens (only when presented in the Learner module)

[ACT.INACT] - if the LE is launchable it will present ACT. If the LE is NOT launchable it will present INACT. Used to specify different CSS Classes depending on launchability, such as: [NAME]

[ATTEMPHISTORYURL] - URL to open Attempt History directly.

[COMPLETION] - the completion status value: incomplete or completed.

[IFARCHIVEQUICKLINK][/IFARCHIVEQUICKLINK] - displays Archive content when accessing the Archive Quicklink in Learner My Courses.

[IFFAILED][/IFFAILED] - all content within this tag will present if LE was Failed.

[IFNOTFAILED][/IFNOTFAILED] - all content within this tag will present if LE was NOT Failed.

[IFCOMPLETE][/IFCOMPLETE] - all content within this tag will present if LE is Complete.

[IFNOTCOMPLETE][/IFNOTCOMPLETE] - all content within this tag will present if LE is NOT Complete.

[IFINCOMPLETE][/IFINCOMPLETE] - all content within this tag will present if LE is in progress.

[IIFNOTINCOMPLETE][/IFNOTINCOMPLETE] - all content within this tag will present if LE is Not in progress.

[IFCONDITIONSSATISFIED][/IFCONDITIONSSATISFIED] - all content within this tag will present if ALL Conditions are Satisfied or if NO Conditions.

[IFNOTCONDITIONSSATISFIED][/IFNOTCONDITIONSSATISFIED] - all content within this tag will present if ANY Condition is NOT Satisfied.

[IFVIEWED][/IFVIEWED] - all content within this tag will present if LE was Started.

[IFNOTVIEWED][/IFNOTVIEWED] - all content within this tag will present if LE was Not Started.

[IFHASATTEMPTS][/IFHASATTEMPTS] - if there are any attempts.

[IFHASNOATTEMPTS][/HASNOATTEMPTS] - if there are no attempts.

[IFILT] [/IFILT] - if Learning Element is of ILT type.

[IFNOTILT] [/IFNOTILT] - if Learning Element is not ILT type.

[IFLOCATION][/IFLOCATION] - all content within this tag will present if there is a Location value.

[IFNOTLOCATION][/IFNOTLOCATION] - all content within this tag will present if there is NOT a Location value.

[IFLOCATIONTOCOMPLETE][/IFLOCATIONTOCOMPLETE] - all content within this tag will present if there is a Location to Complete value.

[IFNOTLOCATIONTOCOMPLETE][/IFNOTLOCATIONTOCOMPLETE] - all content within this tag will present if there is NOT a Location to Complete value.

[IFPASS][/IFPASS] - all content within this tag will present if LE is Passed.

[IFNOTPASS][/IFNOTPASS] - all content within this tag will present if LE is NOT Passed.

[IFSESSIONREGISTER][/IFSESSIONREGISTER] - if ILT has an unique session registered.

[IFSESSIONWAITLISTED] - Shows if there are waitlisted sessions.

[IFSESSIONWAITLISTENABLE] - Shows if session has waitlist enabled.

[IFNOTSESSIONWAITLISTED] - Shows if ILT has no sessions waitlisted.

[WAITLISTCOUNT] - Waitlisted Learners count on selected session.

[IFMULTIPLEREGISTEREDSESSIONS][/IFMULTIPLEREGISTEREDSESSIONS] - if ILT has multiple sessions registered.

[IFNOTMULTIPLEREGISTEREDSESSIONS][/IFNOTMULTIPLEREGISTEREDSESSIONS] - if ILT has not multiple sessions registered.

[IFSESSIONLOCATION][/IFSESSIONLOCATION] - if session has a Location added.

[IFNOTSESSIONREGISTER][/IFNOTSESSIONREGISTER] - if ILT has not a unique session registered.

[IFILTNEXTAVAILABESESSION][/IFILTNEXTAVAILABESESSION] – Shows if there is a session available to register.

[IFNOTSESSIONRECURRANCE][/IFNOTSESSIONRECURRANCE] – shows if session has no recurrences.

[IFSESSIONRECURRANCE][/IFSESSIONRECURRANCE] – shows if session has recurrences.

[ILTSESSIONSOPEN] - link to navigate to ILT sessions. Usage: <button id="btn_[MODULEID][LEID]" type="button" onclick="[ILTSESSIONSOPEN]" ></button>

[ILTNEXTAVAILABESESSIONSTARTDATE] – next session start date, when no session is registered.

[ILTNEXTAVAILABESESSIONSTARTTIME] – next session start time, when no session is registered.

[ILTNEXTAVAILABESESSIONENDTIME] – next session end time, when no session is registered.

[IFPASS][/IFPASS] – shows LE Status if passed.

[IFNOTPASS][/IFNOTPASS] – shows LE Status if not passed.

[IFFAILED][/IFFAILED] – shows LE Status if failed.

[IFNOTFAILED][/IFNOTFAILED] – shows LE Status if not failed.

[IFCOMPLETE][/IFCOMPLETE] – shows LE Status if complete.

[IFNOTCOMPLETE][/IFNOTCOMPLETE] – shows LE Status if not complete.

[ILTREGISTERSESSIONLOCATION] – ILT registered session location.

[ILTREGISTERSESSIONSTARTDATE] – ILT registered session start date.

[ILTREGISTERSESSIONENDDATE] – ILT registered session end date.

[ILTREGISTERSESSIONNEXTDATE] – ILT registered session next recurrence date.

[ILTREGISTERSESSIONSTARTTIME] – ILT registered session start time.

[ILTREGISTERSESSIONENDTIME] – ILT registered session end time.

[ILTREGISTERSESSIONNAME] – ILT registered session name.

[ILTREGISTERSESSIONSTATUS] – ILT registered session status: Open, Full, Started, Ended.

[ILTREGISTERSESSIONTIMEZONE] – ILT registered session time zone.

[ILTREGISTERSESSIONRECURRENCERULE] – ILT registered session recurrence rule.

[ILTREGISTERSESSIONADDTOCALENDARLINK] – ILT registered session calendar link.

[IFSESSIONINSTRUCTOR][ILTREGISTERSESSIONINSTRUCTOR][/IFSESSIONINSTRUCTOR] - shows the Instructor for the registered session.

[ILTREGISTERSESSIONMAXCLASSSIZE] – ILT registered session maximum class size.

[ILTREGISTERSESSIONMINCLASSSIZE] – ILT registered session minimum class size.

[ILTREGISTERSESSIONCURRENTLEARNERS] – ILT registered session current learners.

[LEDETAILSLAUNCH] - onClick support to launch the LE Details UI.

[LOCATION] - the Location (slide position) value .

[LOCATIONTOCOMPLETE] - from LE Details .

[LOCATION%] - Location / LocationToComplete * 100 if Location to Complete is greater than 0 and location is numeric. If not then value is "?".

[PARENTFOLDER] - Parent Folder name.

[SCORE] - scaled score value between 0.00 and 1.00.

[SCOREPERCENTAGE] - percentage score value between 0% and 100%.

[SCOREDETAILSURL] - URL to open Score Details directly.

[STATUS] - Composite of success and completion status using the option set in the LE Type.

[STATUSICONSMALL] - Renders the small icon for LE completion status.

[STATUSICONMEDIUM] - Renders the medium icon for LE completion status.

[STATUSICONLARGE] - Renders the large icon for LE completion status.

[STATUSICONXLARGE] - Renders the X-Large icon for LE completion status.

[STATUSPLAINTEXT] - Composite of success and completion status using only plain text, without style, resx, html tags, etc.

[SUCCESS] - the success status value: unknown; passed or failed.

[TIPLAUNCH] - onClick support to launch LE Details Tool Tip.

Available ILT Sessions Node Tokens (only when presented in the Learner module)

[LAUNCHSESSION] - Token used on the 'onlick' attribute to open the virtual session webinar.

[SESSIONICONSMALL] – ILT sessions small icon.

[SESSIONICONMEDIUM] – ILT sessions medium icon.

[SESSIONICONLARGE] – ILT sessions large icon.

[SESSIONICONXLARGE] – ILT sessions extra-large icon.

[IFSESSIONREGISTER][/IFSESSIONREGISTER] - if ILT session is registered.

[IFNOTSESSIONREGISTER][/IFNOTSESSIONREGISTER] - if ILT session is not registered.

[IFCOMPLETEDPASSEDFAILED][/IFCOMPLETEDPASSEDFAILED] - if session status is Completed, Passed or Failed.

[IFHASATTEMPT][/IFHASATTEMPT] - displays the content only when LE has attempts.

[IFHASNOTATTEMPT][/IFHASNOTATTEMPT] - displays the content only if LE has no attempts.

[IFNOTLEARNERINWAITLIST] - If Learner is not Waitlisted in a session.

[IFNOTSESSIONHASWAITLIST] - If the session has no Learners waitlisted.

[IFSESSIONHASWAITLIST] - If the session has Learners waitlisted.

[IFLEARNERINWAITLIST] - If Learner is waitlisted to a session.

[IFNOTSESSIONWAITLISTENABLE] - Shows if session has waitlist disabled.

[WAITLISTCOUNT] - Waitlisted Learner count.

[IFNOTVIRTUALSESSION][/IFNOTVIRTUALSESSION] - If the session is virtual it will delete everything in between the tokens.

[IFVIRTUALSESSION][/IFVIRTUALSESSION] - If the session is not virtual it will deletes everything in between the tokens .

[IFNOTCOMPLETEDPASSEDFAILED][/IFNOTCOMPLETEDPASSEDFAILED] - if session status is NOT Completed, Passed or Failed.

[IFNOTSESSIONRECURRANCE][/IFNOTSESSIONRECURRANCE] - shows if session has no recurrences.

[IFSESSIONRECURRANCE][/IFSESSIONRECURRANCE] - shows if session has recurrences.

[IFNOTSESSIONFULL][/IFNOTSESSIONFULL] – shows if session is not full.

[IFSESSIONSTARTED][/IFSESSIONSTARTED] – shows if session is started.

[IFSESSIONNOTSTARTED][/IFSESSIONNOTSTARTED] – shows if session is not started.

[IFSESSIONENDED][/IFSESSIONENDED] – shows if session has ended.

[IFSESSIONNOTENDED][/IFSESSIONNOTENDED] – shows if session has not ended.

[IFSESSIONACTIONDISABLED] [/IFSESSIONACTIONDISABLED] – if session is disabled, Learners can not register.

[SESSIONACTIONLINK] - link to register or unregister to sessions. If unavailable it can return en empty value. Example of usage: <button id="btn_[SESSIONID]" type="button" onclick="[SESSIONACTIONLINK]" ></button>

[SESSIONDESCRIPTION] – session description.

[SESSIONID] – session ID number.

[SESSIONNAME] – session name.

[SESSIONSTATUS] – session status: Open, Full, Started, Ended.

[SESSIONSTARTDATE] – session start date.

[SESSIONENDDATE] – session end date.

[SESSIONNEXTDATE] – next session date.

[SESSIONSTARTTIME] – session start time.

[SESSIONENDTIME] – session end time.

[SESSIONRECURRENCERULE] – session recurrence rule.

[SESSIONTIMEZONE] – session time zone.

[SESSIONADDTOCALENDARLINK] – session calendar link.

[IFSESSIONINSTRUCTOR] [SESSIONINSTRUCTOR] [/IFSESSIONINSTRUCTOR] – shows session instructor.

[IFSESSIONLOCATION] [SESSIONLOCATION] [/IFSESSIONLOCATION] – shows session location.

[SESSIONMAXCLASSSIZE] – session maximum class size.

[SESSIONMINCLASSSIZE] – session minimum class size.

[SESSIONCURRENTLEARNERS] – session current learners.

[STATUS] – session status: Completed, Passed, Failed, In Progress, Registered, etc.

Available Learning Element Node Tokens (only when presented in the Learner module WITH conditions)

[ATTEMPTLIMIT] - max number of attempts allowed.

[ATTEMPTLIMITCOUNT] - number of current attempts towards the ATTEMPTLIMIT (can be reset via Limit Reset)

[ATTEMPTLIMITCOUNTREMAINING] - number of attempts remaining until Limit is reached.

[CONDITIONTOOLTIP] - launch required conditions tooltip.

[IFATTEMPTLIMITCOUNTLAST][/IFATTEMPTLIMITCOUNTLAST] - if one attempt remaining.

[IFNOTATTEMPTLIMITCOUNTLAST][/IFNOTATTEMPTLIMITCOUNTLAST] - if not one attempt remaining.

[IFHASATTEMPTLIMIT][/HASATTEMPTLIMIT] - if there is an attempt limit.

[IFHASNOATTEMPTLIMIT][/HASNOATTEMPTLIMIT] - if there is no attempt limit.

Notes:

TOKENS in HTML - TOKENS can be placed in the LE Details HTML, including LELAUNCH or FLAG. This allows limited or complete free form layout for each LE. Tokens in the HTML are processed before the rest of the template.

[FLAG] - If FLAG is set, then IFFLAG will be true for the following HTML. If NOTFLAG is set, then IFFLAG will not be true for the following HTML. Flag status can be set and unset at different locations. The logic testing and processing of IFFLAG true/false logic is sequential.

[DEPTHREL] - The value for this token for the top level (selected) Folder (when filtering) is 0. For the immediate child folders and child LE this token has a value of 1. For grandchildren it is 2, etc.

DEPTHREL allows using classes for each level of the Nodes, such as class="izm_tree.folder.level.[DEPTHREL]".

Responsive Layout

The Accord LMS ships with the Cogent responsive skin that can resize and dynamically adapt its layout to any size of viewing device from 300 pixels wide to over 1000 pixels. Part of the magic are the horizontal panes that will automatically stack depending on the width of the browser. Another trick are the 6 classes that we use to either hide or show content depending on the browser width. The 6 classes have different display values depending on the width of the browser. The Default.Response.xxx templates shipped starting with version 2.14 of the Accord LMS make use of these classes to customize the presentation depending on the device viewing the Catalog. These classes are also available in the Cogent skin CSS.

/* 'PC' Width: Greater than 800 pixels */

.DisplayPC { display: visible; }

.DisplayPCNot { display: none;}

.DisplayiPad { display: none;}

.DisplayiPadNot { display: visible; }

.DisplayiPhone { display: none;}

.DisplayiPhoneNot { display: visible;}

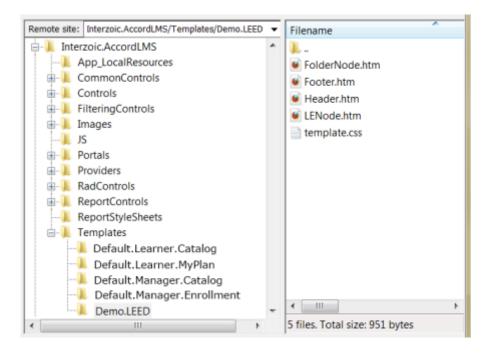/* 'iPad Portrait' Width: Between 600 and 800 pixels */

.DisplayPC { display: none; }

.DisplayPCNot { display: visible;}

.DisplayiPad { display: visible;}

.DisplayiPadNot { display: none; }

.DisplayiPhone { display: none;}

.DisplayiPhoneNot { display: visible;}

/* 'iPhone' Width: Less than 600 pixels */

.DisplayPC { display: none;}

.DisplayPCNot { display: visible;}

.DisplayiPad { display: none;}

.DisplayiPadNot { display: visible; }

.DisplayiPhone { display: visible;}

.DisplayiPhoneNot { display: none;}

Demo.LEED

We will create a new template for a fictional course on LEED (Leadership in Energy & Environmental Design) certification. There will be 5 Learning Events: 3 Webinars, an exam and a certification. The LEED template, shown in the image at the top of this page, does not have a header, footer or present any folders. Therefore, all the template files are empty except for LENode.htm.

For this example we will create a copy of the Learner.MyPlan template and rename to Demo.LEED. We will edit the template files locally and then copy back to the web server. Often this in an iterative process where you make edits locally, upload to the server, refresh a browser opened to your Learner module, see how the updates look and then edit some more. From the FTP client you can see we have the four default templates and one demo template: Demo.LEED.

Here is the LENode.htm used in the LEED Certification Learner Catalog example shown at the top of this blog. It includes a CSS "button" that dynamically sizes to the provided Link Text. You may utilize any button you want.

```
<div style="border: 3px solid rgb(32, 146, 196); padding: 2px;">

<table width="100%"><tbody><tr>

<td valign="top" width="70%" style="white-space:normal;padding: 1px 1px 2px 10px;""><div style="padding: 0px 0px 4px 0px;">[NAME]</div>[DETAILS]</td>

<td align="center" valign="center" ><div>[STATUS]</div><br>

<table align="center" border="0" cellpadding="0" cellspacing="0">

<tbody><tr>

<td class="izmlms-btntdleft"><br /></td>

<td class="izmlms-btntdmiddle"><a onclick="[LELAUNCH]" href="javascript:void(0);">Launch Content</a></td>

<td class="izmlms-btntdright"><br /></td>

</tr></tbody></table><br />

</td></tr>

</tbody></table></div>
```

Select your Template

After you have uploaded your template to the web server, you can specify which LE Catalog TreeGrids use the new template from Learner > Configuration > Templates and Manager > Configuration > General Details > Templates.

To complete the desired LEED presentation in the Learner module we also a) filtered the Catalog to just the LEED Certification Parent Folder and b) selected to hide the Folder Nodes which also removes the indentation used for nested folders.

Custom Layout depending if Conditions are Satisfied

Manager > Configuration > LE Types

Make a new LE Type called "Confirmation" (for this example).

LE Details HTML for the Confirmation LE

Use [IFCONDITIONSSATISFIED], [IFNOTCONDITIONSSATISFIED], [IFCOMPLETE] and [IFNOTCOMPLETE] to customize three different messages, depending if the conditions have been satisfied and if the LE is completed - similar to the nested logic shown in the Template example below.

Start Template Example 1

All formatting for Conditions is in the template, only the text is customized in the DETAILS

End Template Example 1

Start Template Example 2

Layout is determined by each LE Details (FLAG is set to true, does not require LETYPE: token). All formatting, text and Submit [LELAUNCH] is customized in the DETAILS.

End Template Example 2

Endless Possibilities

Token/Template architecture opens up endless possibilities for LE Catalog presentation. Once created, the templates can be used by any other Catalog on your portal and the template files can be FTPed to other Accord LMS sites as well.

An example that only shows Learning Events and utilizes different CSS depending on the Status:

MIME Type Settings (self-hosted clients)

MIME types are file type definitions used by web servers. If some of your SCOs launch from the LMS but then "hang" and do not proceed or complete, you need to check your MIME type settings for .flv, .swf, .mp3 and .mp4 files. Here are the settings that should cover all of the different SCO sources:

Extension: .flv = MIME type: video/x-flv

Extension: .mp3 = MIME type: audio/mpeg

Extension: .mp4 = MIME type: video/mp4

Extension: .swf = MIME type: application/x-shockwave-flash

Open IIS Admin, right click on your web server, choose properties, click on MIME Types button. If the .flv MIME type is not already registered then click on New (in the example screenshot .flv is already in the list because I had added it earlier, just click on New to add it to your server), add the Extension: .flv and MIME: video/x-flv and click OK.

ℹ️ The screen shots show flv-application/octet-stream, which also works but video/x-flv is better.

- Then restart IIS:

Uninstalling Accord LMS (self-hosted clients)

> ⊗ **Please note:** Uninstalling any of the LMS modules will cause all the database objects to be deleted. Only uninstall any of the modules if you intend to uninstall the entire LMS module set.

Uninstalling Instructions

- Browse to **Host** > **Extensions**.
- You'll find the 3 LMS Modules: **LMS**, **LMS Learner** and **LMS Reports**.
- Click the **bin icon** next to each module.

- Click **UnInstall Package** to begin the uninstall process.

Follow the on-screen instructions until the Module is completely removed from your site.

Repeat the above steps to UnInstall all the Accord LMS Modules.