LMS ADMIN GUIDE



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Table of Contents

Getting Started	7
Getting Started - Introduction	8
Before You Begin	9
System Requirements	
Module Installation and Setup	12
Accord LMS Access	13
Accord LMS Access - Introduction	14
Registration Options	15
User Registration	24
Login	
Password Recovery	
Certified Authoring Tools	
Introduction - Certified Authoring Tools	
Assessment and Survey Authoring Tools	
Integrated Third-Party Authoring Tools	
Integrated Third-Farty Authorning 10015	
LMS Admin Overview	
LMS Admin Overview	81 82
LMS Admin Overview The LMS Administration Module	81 82 92
LMS Admin Overview The LMS Administration Module Tree Grid	81
LMS Admin Overview The LMS Administration Module Tree Grid Tree Grid - Introduction	81
LMS Admin Overview The LMS Administration Module Tree Grid Tree Grid - Introduction Navigating the Tree Grid	
LMS Admin Overview The LMS Administration Module Tree Grid Tree Grid - Introduction Navigating the Tree Grid Details for Learning Catalog Folders	
LMS Admin Overview The LMS Administration Module Tree Grid Tree Grid - Introduction Navigating the Tree Grid Details for Learning Catalog Folders Conditions Flags	
LMS Admin Overview The LMS Administration Module Tree Grid Tree Grid - Introduction Navigating the Tree Grid Details for Learning Catalog Folders Conditions Flags Tree Grid Search	
LMS Admin Overview The LMS Administration Module Tree Grid Tree Grid - Introduction Navigating the Tree Grid Details for Learning Catalog Folders Conditions Flags Tree Grid Search The Learning Catalog	
LMS Admin Overview The LMS Administration Module Tree Grid Tree Grid - Introduction Navigating the Tree Grid Details for Learning Catalog Folders Conditions Flags Tree Grid Search The Learning Catalog Learning Catalog - Introduction	
LMS Admin Overview The LMS Administration Module Tree Grid Tree Grid - Introduction Navigating the Tree Grid Details for Learning Catalog Folders Conditions Flags Tree Grid Search The Learning Catalog Learning Catalog - Introduction Learning Catalog Folders, Courses or Paths	
LMS Admin Overview The LMS Administration Module Tree Grid Tree Grid - Introduction Navigating the Tree Grid Details for Learning Catalog Folders Conditions Flags Tree Grid Search The Learning Catalog Learning Catalog - Introduction Learning Catalog Folders, Courses or Paths Learning Elements; (learning-content)	

	OpenSesame - The Learning Marketplace	206
	Remote SCO Learning Content	212
	YouTube Learning Element	223
	Searching for Learning Content within the Catalog	230
	Grading a Learner Uploaded Assignment	234
Instru	ctor Led Training (ILT)	239
	ILT Learning Elements	240
	ILT Sessions	245
	Session Details	257
	Session Roster	263
	Learner List	279
	ILT Enrollment	282
	Virtual ILT (VILT)	285
	Display or Filter Sessions by Specific Instructors	296
Procto	oring	298
	Proctoring - Introduction	299
	Configure the Accord LMS for Proctoring	300
	Configure Reports to Present Proctoring Data	303
	Setup Proctoring for a given Learning Element	306
	Learner Steps Necessary to be Proctored	308
Action	۱۶	310
	Actions - Introduction	311
	Add Enrollment	313
	Drop Enrollment	318
	Add to Catalog	322
	Drop from Catalog	327
	Query Learning Catalog	331
	Query Learning Roles and Members	334
	Create LE Attempt Records	338
	Delete Attempt Records	345
	Restore Attempt Records	350
	Recalculate Folder Attempt Records	356

Export Enrollment to CSV File	
Search for Enrolled Learners	
Roles	
Learning Roles - Introduction	
Creating and Managing Learning Roles	
Establish any Learning Roles' Rules for Membership	
Roles: Member Management	
Roles: Enrollment	
Roles: Notifications	
Roles: Bulk Learner Assignment	
Teams	
Teams - Introduction	
Add Child Team	
Moving and Copying Teams	
Team Details	
Establish Team Learning Content, Learning Roles and Portal Access	409
Team Access Codes	
Send Team Message	
LMS Admin Types	
LMS Admin Management	
LMS Admin Notifications	
Bulk LMS Admin Assignment	
Bulk LMS Admin Import	
Learners	
Learners - Introduction	
Learner Management	
Learner Notifications	454
Bulk Learner Assignment	
Bulk Assign Learners to a Team	
Bulk Learner Import	
Bulk Learner Import - FTP & Reports	
Configuration	

Configuration - Introduction	
General Options	
Notifications	
Folder Types	
Learning Element Formats	
Status Types	503
Education Activities	506
ILT Resources	
Role Based Redirection	
Import Data or Folder Attempts	
Import Teams	
Import Roles	
Import Learning Folders	538
Import Learning Elements	543
Enhanced Feature Status	
Integration	
LMS Logs	
Email Templates	
OpenSesame - Configuration	
Check and/or Update License Key and Details	
License Notifications	590
Gamification	593
Gamification - Introduction	
Learner Experience - Earning Points and Badges	595
LMS Education Activities	
Gamification Mechanics	
Gamification Leaderboard	
Gamification Profile	614
The Learner Module	618
Learner Module - Introduction	619
General Settings	621
Calendar	624

Electives	
Transcripts	
Access	
Templates	
The Reports Module	
The Reports Module - Introduction	
Reports	
Learning Element Activity Quick Report	
Learner Activity Reports	
Learning Content Utilization Reports	676
Report Definitions	716
Delivery Schedule	726
Activity Graph	738
Reports - Configuration	740
Reports for Charts	742
The Charts Module	743
The Charts Module - Introduction	744
Adding New Chart Modules	746
Charts - Configuration	751
Sample Charts	756
Advanced Options	770
Active Learner Impersonation	772
Impersonate an Active Learner	
Appendix	777
GoToWebinar and GoToTraining Integration	
Support & Resources	
SCORM Specifications	
Updating the 'Contact Us' Form	
Learner UI Templates	
MIME Type Settings (self-hosted clients)	
Uninstalling Accord LMS (self-hosted clients)	

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: <u>http://www.dnnsoftware.com/platform/start/install#2047</u>

Module Installation and Setup

Review the <u>Accord LMS - Quick Start for Self-Hosted Self-Installed guide</u>. It will guide you through the installation procedure (if self-hosting) and initial setup. Refer to the <u>Accord LMS - Getting Started Guide</u> 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

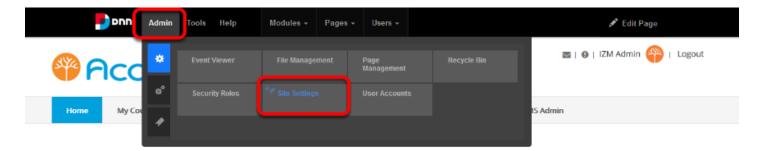
The User Registration screen of your DNN portal can be fully customized to suit your security needs and give you more detailed information about your Accord LMS Learners.

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

Pccord LMS	Register
Home ECommerce	
User Registration	
First Name:*	
Last Name:*	
User Name:*	
Password:*	
Confirm Password:•	
Display Name:	
Email Address:*	
Phone Number:	
Company Name:	
Access Code:	
Register	

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

• Navigate to Admin > Site Settings.



Welcome to Accord LMS Variant Portal



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

	15	🔤 🛛 IZM Admin 🍄 Logout
Home My Courses Catalog	Resources Transcript Community ECommerce	LMS Admin
Basic Settings Advanced Settings	Jser Account Settings Stylesheet Editor	~
Title: * 🖲	Accord LMS Documentation Portal	
Description: ()		
Keywords: 🕚	<u>ь.</u>	

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.

Accord LMS

- **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.

Pccord LMS	🜌 🛛 IZM Admin 🍄 Logout
Home My Courses Catalog Resources Transcript Community ECommerce LMS A	dmin
Basic Settings Advanced Settings User Account Settings Stylesheet Editor	
Collapse All Registration Settings	•
User Registration: None Private Public Verified	
Receive user registration 🕕 🔽 notification:	
Use Authentication Providers: 🕕	
Excluded Terms: Use Profanity Filter:	
Registration Form Type:	

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.)

PACCORDINS

Verified:

*Note: Membership to this website is Verified. Once your account information has been submitted, you will receive an email containing a link that you can use to verify your account. 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.)

- **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.

Re	gistration Settings		
	User Registration: 🕕	None Private Public Verified	
	Receive user registration notification:		
	Use Authentication Providers: 🕕		
	Excluded Terms: 🕕		
	Use Profanity Filter: 🕕		
	Registration Form Type: 🛈	Standard Custom	
	Use Email Address as Username: 🕕		
	Require Unique Display Name: 🕕		
	Display Name Format: 🕕		
	User Name Validation 🚳		
	Email Address Validation: 🕕	$eq:started_st$	
	Use Random Password: 🕕		
	Require Password Confirmation: 🕕		

Standard Registration

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

Registration Form Type: 🖲	Standard Custom
Use Email Address as Username: 🕕	
Require Unique Display Name: 🕕	
Display Name Format: 🕕	
User Name Validation 🕚	
Email Address Validation: 1	$\boxed{ ^{s*[a-zA-Z0-9_\%+\#&^{*}/=^{(}]^{-}](?:.?[a-zA-Z0-9_\%+\#&^{*}/=^{(}]^{-}])^{9} } }$
Use Random Password: 🕕	
Require Password Confirmation: 🕕	
Require a valid Profile for 🕚 Registration:	
Use CAPTCHA For Registration: 🕕	
Redirect After Registration: 🖲	<none specified=""></none>
Requires Unique Email: 🕕	False
Password Format 📵	Encrypted

- 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.

Registration Form Type: 🕕	Standard Custom
Use Email Address as Username: ()	
Require Unique Display Name: ()	
Display Name Format: 🕕	·
User Name Validation 🖲	
Email Address Validation: (1)	^\s*[a-zA-Z0-9_%+#&'*/=^`{ }~-](?:\.?[a-zA-Z0-9_%+#&'*/=^`{ }~-])*
Use Random Password: 🕕	
Require Password Confirmation: 🕕	
Require a valid Profile for 🕕	
Registration:	
Use CAPTCHA For Registration: 🕕	
Redirect After Registration: 1	<none specified=""></none>
Requires Unique Email: 🕕	False
Password Format 📵	Encrypted
Password Retrieval Enabled 🕕	True

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.

Registration Form Type: 🌘	Standard Custom
Use Email Address as Username: 🌘	
Require Unique Display Name:	
Display Name Format:	
User Name Validation 🥡	
Email Address Validation: 🌘	\b[a-zA-Z0-9%\-+]+@[a-zA-Z0-9.\-]+\[a-zA-Z](2,4]\b
	and the second sec
Requires Unique Email: 🌘	False
Use Random Password: 🌘	
Require Password Confirmation:	
Password Expiry (in days): 🌘	0
Password Expiry Reminder (in days): 🌘	7
Password Format 🍙	Encrypted
Password Retrieval Enabled	
Password Reset Enabled	
Min Password Length	7
Min Non Alphanumeric Characters 🏾	0
Requires Question And Answer 🌘) False
Password Strength Regular Expression	
Max Invalid Password Attempts	
Password Attempt Window Require a valid Profile for Registration:	
Use CAPTCHA For Registration: 🌘	
Redirect After Registration:	

- **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.

Registration Form Type: 👔	Standard Custom
Use Email Address as Username: Require Unique Display Name: Display Name Format: User Name Validation	
Email Address Validation: 🕕	\b[a-zA-Z0-9,_%\-+]+@[a-zA-Z0-9,\-]+\[a-zA-Z][2,4)\b
Requires Unique Email: 0 Use Random Password: 0 Require Password Confirmation: 0	
Password Expiry (in days): 👔	0
Password Expiry Reminder (in days): 🕚	7
Password Format Password Retrieval Enabled Password Rest Enabled Min Password Length Min Non Alphanumeric Characters Requires Question And Answer Password Strength Regular Expression Max Invalid Password Attempts Password Attempt Vindow	True True 7 0 False 5
Require a valid Profile for Registration:)
Use CAPTCHA For Registration: 1	

Custom Registration

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

Registration Form Type:	Standard Custom
Registration Fields:	
Require Unique Display Name: 👔	
Display Name Format:	
User Name Validation	
Email Address Validation:	b[a-zA-Z0-9%\++']+@[a-zA-Z0-9.\-]+\.[a-zA-Z]{2,4}\b
Requires Unique Email:	
Password Expiry (in days):	0
Password Expiry Reminder (in days):	7
Password Format	Encrypted
Password Retrieval Enabled	
Password Reset Enabled	
Min Password Length	
Min Non Alphanumeric Characters	
Requires Question And Answer	
Password Strength Regular Expression	
Max Invalid Password Attempts	
Password Attempt Window	10
Require a valid Profile for Registration:	
Use CAPTCHA For Registration:	
Redirect After Registration:	Registration Successful

- Registration Fields: You can specify the list of fields you wish to include as a commadelimited 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.

Accord LMS

- **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.

Registration Form Type: 👔	Standard Custom
Registration Fields: 🚯	
Require Unique Display Name: 👔	
Display Name Format: 👔	
User Name Validation 🚯	
Email Address Validation: 1	\b[a-zA-Z0-9%\+*]+@[a-zA-Z0-9.\+]+\\[a-zA-Z]{2,4}\b
Requires Unique Email: 👔	False
Password Expiry (in days): 👔	0
Password Expiry Reminder (in days): 👔	7
Password Format 👔	Encrypted
Password Retrieval Enabled 🕧	True
Password Reset Enabled 🚯	True
Min Password Length 👔	7
Min Non Alphanumeric Characters 👔	0
Requires Question And Answer 👔	False
Password Strength Regular Expression 👔 Max Invalid Password Attempts 🁔	5
Password Attempt Window 👔	10
Require a valid Profile for Registration: 🕦	
Use CAPTCHA For Registration: 🕦	
Redirect After Registration: 👔	Registration Successful

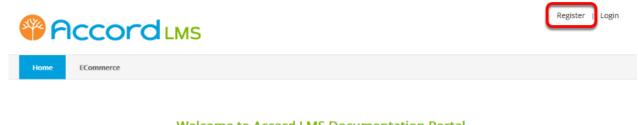
Once finished performing all the changes to the Registration Process, click/tap **Update** to save the modifications.

Require a	Password Attempt Window (1) a valid Profile for Registration: (1)	10	
Use	e CAPTCHA For Registration: 👩		
	Redirect After Registration: 👩	Registration Successful -	
Login Settings			

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.



Welcome to Accord LMS Documentation Portal



If you are already a Registered Learner, please Login.

If you are new to Accord LMS Documentation Portal, please Register.

• The User Registration page displays.

Pccord LMS		Register	Login
Home ECommerce			
User Registration			
First Name:*			
Last Name:*			
User Name:*			
Password:*			
Confirm Password:*			
Display Name:			
Email Address:*			
Phone Number:			
Company Name:			
Access Code:			
Register			

- 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.



Welcome to the Accord LMS Portal

Register

Login



If you are already a Registered Learner, please Login.

If you are new to Accord LMS Portal, please Register.

On the login page;

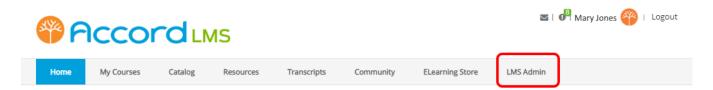
- Type your **Username** in the field provided.
- Type your **Password** in the field provided.
- Click the **Login** button.

SAVYA	Accord LMS
-------	-------------------

Home		
Username:		
Password:		
	Login	Cancel
	Remember Login	
	Register	Reset Password

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

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



Welcome to the Accord LMS Portal



Password Recovery

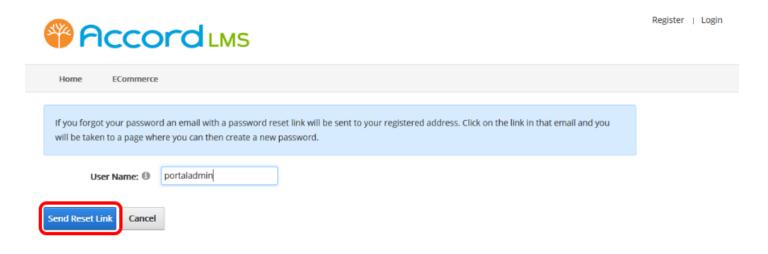
If a Password has been lost or forgotten, a new Password can be created by using the **Reset Password** link.

The reset password link is temporary and not reusable.

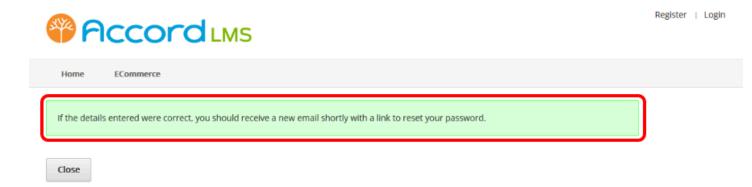
- Click the **Login** link from your LMS portal home page.
- On the login page, click the Reset Password link.

Pcc	Pccord LMS				
Home					
Username: Password:	Login	Cancel			
	Register	Reset Password)		

- 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.



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

Certified Authoring Tools

Introduction - Certified Authoring Tools

Please see the <u>Certified Authoring Tools</u> 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 <u>support@accordlms.com</u> 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

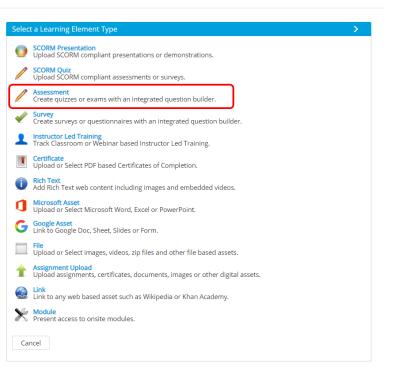
Assessments, like any Learning Element, can be added to any folder or course.

- 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.

Pacco	rd LMS				🛛 🕕 LMS Administrator	
Home My Courses	Electives Resources	Transcript	Community	ECommerce	LMS Admin	
Catalog Roles	Teams Actions Confi	guration			Active Team: All Members	•
	ove To ¥ Remove / De	lete				0
🕨 🖶 Product Trainir	g Folder Details Folder Enrollment Folder Conditions Folder Notifications Add Course Add Folder Add Learning Path Add Organizational Folder Add Learning Element Learner List					

• Click on **Assessment**.

New	Learn	ing E	lement
-----	-------	-------	--------



- **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.

General Sett	ings	~
	Name: * 🕕	
Lear	ning Element Format: Assess	ment - Modal Window - 950x650
	Window Dimensions: 🕕 🗉	
	Enable Proctoring: 🕕 📃	
	Description:	
		ma
	Design HTML Passing Score: 0	96
	Questions to Ask: * 🔍 0 Total	
	Ques	tion Builder
Advanced S	ettings	>

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

Accord LMS

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.

		C	Computer Security Pre-test
	iroup 1:		
		Group Name: * 🗐 Questions to ask: 🗐	SAII ©Limited Number
^	Uuestic	on 1:	*
		Question: * 📵	
		Required: 🗐 Weight: 🗐	
		Type: 🕲	_
		orrect Feedback:	
		Answer: * 🗐 Feedback: 🗊	× •
		Correct: (1)	•
	Add New /		Drag and Drop a File or Select an Option
Add	New Quest	lion Import Quest	tions

- **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.

Computer Security Pre-test

^	Group 1: Basic Knowledge			
	Group Name: * () Questions to ask: ()	Basic Knowledge ●All ●Limited Number 8		

- **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.

	Question: * 🕕	Why might someone break into (hack) your computer?
	Required: 🕕	
	Weight: 📵	1
	Туре: 🕕	Multiple Choice (single answer)
(Correct Feedback: 📵	
In	correct Feedback: 🛈	
I	Answer: * 🕕	They don't like you.
	Feedback: 📵	
	Correct: 📵	0

Enter any answer that you prefer for this question.

Click Add New Answer.

	Question: * 🗊	Why might someone break into (hack) your computer?	
			1
	Required: 🕕		
	Weight: 🕕	1	
	Туре: 🕕	Multiple Choice (single answer)	•
	Correct Feedback: 🕕		••••
	Incorrect Feedback: 🕕		
I	Answer: * 🗊	They don't like you.	
	Feedback: 🕕		
	Correct: 🕕	0	

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.

	Answer: * 🗊	They don't like you.
	Feedback: 📵	
	Correct: 🕕	•
I	Answer: * 🕕	To commit a crime.
	Feedback: 🛈	
	Correct: 📵	0
	Answer: * 🗊	Random vandalism.
ove to Top	Feedback: 🕕	
ove Up	Correct: 🕕	•
ove Down ove to Bottom		
	Answer: * 🗊	To use it to distribute porn, malicious programs, etc.
	Feedback: 🕕	
	Correct: 🕕	0
I	Answer: * 📵	All of the above.
I	Answer: * 🛈 Feedback: 🚯	All of the above.

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.

	Question: * 🕕	Why might someone break into (hack) your computer?	
	Required: 0		h
	Weight: 🗐 Type: 🗐	Multiple Choice (single answer)	•
	Correct Feedback:		
	correct Feedback: 🛈		
1	Answer: * 🖲	They don't like you.	
	Feedback:		
	Correct: 0	0	
1			
	Answer: * 🕕	To commit a crime.	
	Feedback: 🕕		
	Correct: 🕕	•	
1	Answer: * 🖲	Random vandalism.	
	Feedback: 🕕		
	Correct: 🕕	0	
	Answer: * 🖲	To use it to distribute porn, malicious programs, etc.	
	Feedback:	To use it to assentate point maneous programs, etc.	
	Correct: 0	0	
•	Answer: * 🕕	All of the above.	
	Feedback:	•	
	Correct: 🕕	•	
Add New	/ Answer	iči 主 🖉 🗙	

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

Question 1: Why might som	eone break into (hack) your	
Question: * 🖲	Why might someone break into (hack) your computer?	
Required: 🛈		h
Weight: @	1	
Type: 1	Multiple Choice (single answer)	-
Correct Feedback: @		
Incorrect Feedback: 🛈		
Answer: * 0	They don't like you.	*
Feedback: 0		
Correct: @	0	
1		
- Answer: • 🙂	To commit a crime.	*
Feedback: ()		
Correct: 🛈	•	
Answer: * 🖲	Random vandalism.	×
Feedback: 🕕		
Correct: 🔘	0	
Answer: * 0	To use it to distribute porn, malicious programs, etc.	*
Feedback: 0		
Correct: @	0	
1	Concession of	
Answer: • 🙂	All of the above.	•
Feedback: Correct:	۲	
Add New Answer	mayresdefaultige	
dd New Question Import Quest	ions	

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.

Question: * 🕚	The way I operate my computer can affect other people.
Required: 🖲	
Weight:	
Type:	
Correct Feedback:	
Incorrect Feedback:	
Answer: * 🕚	True
Feedback: 🕚	
Correct: 0	۲
Answer: * 🛙	False
Feedback: 0	
Correct: 0	•
	stock-vector-businessman-to-operate- e-personal-computer-338799371.jpg

You can add any number of question groups needed.

• Click the Add New Question Group.

Group Name: * 🕕 Questions to ask: 🚯		
✔ II Question 1: You just got a n	ew computer which has an	*
✔ I Question 2: A worm is		*
V II Question 3: The way I opera	ate my computer can affect	*
✔ II Question 4: Why might som	eone break into (hack) your	*
♥ II Question 5: If you recieve a	n email claiming to need	*
♥ I Question 6: Both email atac	hments and downloaded fil	*
✔ I Question 7: What is the best	t way to protect your inf	*
♥ I Question 8: What is a firewa	311?	*
✔ I Question 9: A strong password should contain:		*
✔ I Question 10: Social enginee	ring is:	*
Add New Question Import Quest	tions	

Computer Security Pre-test

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.

Group Name: * 🕕 Questions to ask: 🕕	Basic Database Security ©All ©Limited Number
A Uuestion 1:	*
Question: * 🕕	
Required: 🗐	
Weight: 🕕	1
Туре: 🛈	Multiple Choice (single answer)
Correct Feedback: 📵	
Incorrect Feedback: 📵	
I Answer: * (1)	*
Feedback: 🕕	
Correct: 🕕	0
Add New Answer	Drag and Drop a File or Select an Option
Add New Question Import Quest	lons

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.

Import Questions			
Question Source: 🕕	◎Existing Group		
	dbAdvanced_Features.csv		
Import Cancel			

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**.

Message	
5 records were imported	
ок	

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.

Group Name: * () Basic Da Questions to ask: () OAII OL	tabase Security
• II Question 1: Database tables should be	encrypted usin 💥
♥ II Question 2: Securing a database applic	ation with use
V II Question 3: Why is database security no	ecessary?
V II Question 4: Why is database security no	ecessary?
V II Question 5: Is user authentication and	authorization 🗮
Add New Question Import Questions	
ew Question Group	

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**.

LE Details		
Design HTML Pre	view Words: 0 Characters: 0	
Passing Score: 🕕 Questions to Ask: * 🕕	90 % 13 of 15 Total Question Builder	
Version History: 🕕	Created: IZMAdmin on 20 July 2017 at 3:26:35 PM Updated: IZMAdmin on 25 July 2017 at 12:11:02 PM	•
Advanced Settings		· ·
Messages		~
Education Activities		~
Update Delete Cancel		

- 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.

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- **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.

Advanced Settings	
LE Type: 🕕	Assessment 👻
Learning Element Format: * 🕕	Assessment - Modal Window - 950x650
Utilization Tracking: 1	Provided by Assessment
Randomize Question Order:	
Randomize Answer Order: 🕕	0
Question Feedback: 🕕	None 👻
Pass to Complete: 🕕	0
Custom Window Dimensions: 📵	
Time Limit: 🕕	
LEID: Local ID: Reference:	a55fc309-e938-474f-a4ba-8cf88526747a 1097 @Active ©Inactive
Status: 0	
Views: ④ Publish Date: ⑤ Unpublish Date: ⑤ Tags (separated by commas): ⑥	0 20 Jul 2017 IIII IIII
Utilized in Folders: 🕕	LMS Learner Training
History:	Created: IZMAdmin on 20 July 2017 at 3:26:35 PM
	Updated: IZMAdmin on 25 July 2017 at 3:34:04 PM

^

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**.

LE Details

(

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

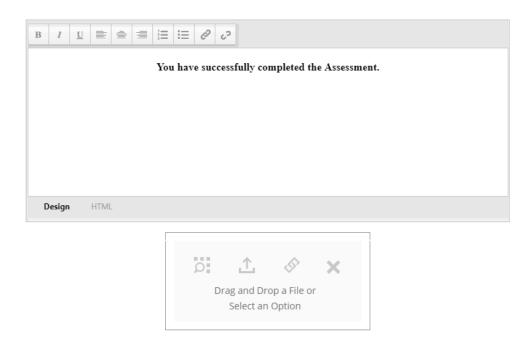
• **Introduction:** This will be presented to the Learner immediately after launching the Learning Element. You can use this section to give general instructions, objectives or indicate the passing score. Additionally, you can include images for better looks and understanding.

Introduction



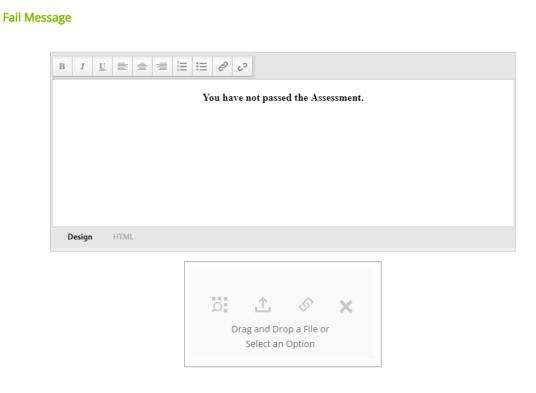
• **Pass Message:** This message will be displayed to those Learners that pass the assessment. It might be useful to provide some additional information or to congratulate for passing. Any information included in this text box can be followed by an image or graphic that emphasize the message.

Pass Message



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• **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.



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		

~

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.

Pccor						- 🍄 Logout
Home My Courses	Electives Resources	Transcript	Community	ECommerce	LMS Admin	
Catalog Roles	Teams Actions C	onfiguration			Active Team: All Members	?
Catalog Copy To • Mo	ve To 🔻 Remove	Delete				0
 My Catalog Crphans E 2 First Aid Certification 						
🕨 📄 🛅 Product Training	Folder Details Folder Enrollment Folder Conditions Folder Notifications					
	Add Course Add Folder Add Learning Path					
	Add Organizational Folde Add Learning Element Learner List	-				

• Click Survey.

Selec	t a Learning Element Type
Ø	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.
1	Instructor Led Training Track Classroom or Webinar based Instructor Led Training.
	Certificate Upload or Select PDF based Certificates of Completion.
i	Rich Text Add Rich Text web content including images and embedded videos.
1	Microsoft Asset Upload or Select Microsoft Word, Excel or PowerPoint.
G	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.
0	Module Present access to onsite modules.

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

Create sur		an integrated question builder.		
	Name: * 🕕 Description: 🕼	Learner Satisfaction Survey Basic Text Box ®Rich Text Ed • ① • ② • ③ • ② • ② • ②		
	E 🚖 🚍 📰 🖽 🐔	i i≡ i≡ = *a *A ▲·	Z • Paragraph Style	
	Design HTML Pro Questions: * •	0 Total Question Builder	Words: 0 Characters: 0	
vanced Se essages	-			
ucation Ac	tivities			

• **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.

Learner Satisfaction Survey

^	Group 1: Your views of the course		*
	Group Name: * 🗊	Your views of the course	
	Questions to ask: 📵	●All OLimited Number	

- **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.

Quest	ion: *	The training focused on relevant skills.	
	uired: 📵 Type: 🗊	Rating (Likert Scale)	
Hide Option V	alues: 🕕		
	ion: * 	Strongly disagree.	*

Add all the options that you would like to include.

Click Add New Option.

^	Question 1: The training focu	used on relevant skills 🗱
	Question: * 🗊	The training focused on relevant skills.
	Required: 🗊	
	Туре: 🕕	Rating (Likert Scale)
	Hide Option Values: 🕕	
	Option: *	Strongly disagree.
(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.

I	Option: * 1 Label: 1	1. X Strongly disagree. X
I	Option: * 1 Label: 1	2. 🗱 Disagree.
I	Option: * 🛈 Label: 🛈	3. 🗶 Agree.
I	Option: * 🕄 Label: 🕄	4. Strongly agree.
Move to Top Move Up	Option: * ① Label: ①	5. Image: Second seco
Move Down Move to Botton	n Dition	

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.

	Required: 🕕	
ні	Type: 🗊 de Option Values: 🗐	Rating (Likert Scale)
1	Option: * 📵	1.
	Label: 🛈	Strongly disagree.
I	Option: * 📵	2.
	Label: 🛈	Disagree.
1	Option: * 📵	3.
	Label: 🛈	Neither agree nor disagree.
I	Option: * 📵	4.
	Label: 🕕	Agree.
I	Option: * 📵	5.
	Label: 🕕	Strongly agree.
Add New		Image: Second and a second a se

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.

	Group Name: * 🗐	Your views of the course
	Questions to ask:	
•	Question 1: The training foc	used on relevant skills 🗱
	Question: * 🗐	The training focused on relevant skills.
	Required: 🖲	
	Type: 🗐	Rating (Likert Scale)
	Hide Option Values: 1	
	Doption: * 📵	1. 🗱
	Label: 🕕	Strongly disagree.
	- Option: - O	2.
	Label: 🕕	Disagree.
	Option: *	3.
	Label: 📵	Neither agree nor disagree.
	Option: *	4.
	Label: 1	Agree.
	I	5.
	Option: Option:	Strongly agree.
	Add New Option	Likert scale jog
dd	New Question Import Quest	

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.

^	∎ G	iroup 2: Complementary Feedbac	:k		*
	eroup numer -		Omplementary Feedback		
	~	Question 1:		*	
	Add	New Question	ons		
Add	New (Question Group			
Upc	late	Cancel			

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.

Import Questions		
- Question Source: 🕕		
	Survey Import.csv	
Import Cancel		

A sample Survey .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.

Message	
3 records were imported	
ОК	

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.

	Group Name: * 📵	Complementary Feedback
	Questions to ask: 📵	●All OLimited Number
~	Question 1: Was the course	free of commercial bias t 🗱
~	Question 2: Did the course p	present a balanced view o 🗱
~	Question 3: What other topic	cs would you like to lear 🗱
del Marrie		
Update	Question Group	
Update		rt_Example.csv

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**.

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
	(
Vessages	
Education Activities	

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.

	You have completed the Survey.
Design HTML	
	Drag and Drop a File or Select an Option

Completion Message

To access the Advanced Settings section:

• Click the **down arrow**.

Question Builder

Questions: * 1	4 Total Question Builder Updated: IZMAdmin on 27 July 2017 at 11:00:37 AM Updated: IZMAdmin on 27 July 2017 at 12:00:52 PM	ж т
Advanced Settings		(v
Messages		Ť
Education Activities		~
Update Delete Cancel		

- 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.

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- **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.

Advanced Settings	^
LE Type: 🕕 Learning Element Format: * 🚯	Survey Survey - Modal Window - 950x650
Utilization Tracking: 📵	Provided by Survey 👻
Randomize Question Order: 📵	
Randomize Answer Order: 🕕	
LEID: 🕕	980e4eb0-18d6-4320-94f9-1b80caf151a3
Local ID: 🕕	1098
Reference: 🕕	
Status: 🕕	●Active ◎Inactive
Views: 🕕	2
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

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.

XXXX	ค	C	C	or	d	
		<u> </u>				

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	n 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 <u>iSpring Solutions</u>, 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: <u>iSpring Downloads</u>.
- 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'.

K Quick Start	and a second		X
Spring :	Suite		
Courses Quizzes Interactions	Create New Graded Quiz Create New Graded Quiz Survey	Recent Quizzes	3
Video Tutoria	ls Community Forum	? Knowledge Base	Support

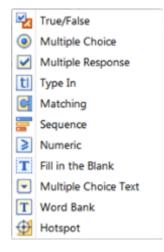
Write a title for the quiz in the field provided.

Questions	Intro Slide
Q Search	
Tire Safety Intro Slide	Tire Safety
Question Group 1	
No questions	
Add graded or survey question	Description
▲ Result Slides	
Congratulations. You passed! Passing Result	Click the "Start Quiz" button to proceed
You did not pass Failing Result	

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



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



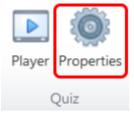
- Write the question in field provided.
- Select correct response.

Questions	True/False Question			
Q Search	I	t is very ir	nportant that tires are inflated to the manufacturer's recommended pressure.	
Tire Safety Intro Slide				
Question Group 1				
1. It is very important that tires are inflated				
True/False	Answer			
 Result Slides 		C .	B '	
Congratulations. You passed!		Correct	Premise	
Passing Result		۲	True	
You did not pass Failing Result	-	0	False	
Foung Resou				

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.

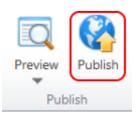
Options Feedback and Branching		
Use default options		
Score: By Question 💌 Attempts:	1 •	Limit time to answer the question
Points: 100	Shuffle answers	Time limit: 1 🚔 mins 0 🚔 secs
Penalty: 0		

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**.

General Com	pression	Advanced	Learning Course			
Quiz title: Local folder: Output Desktop All Mobile	Tire Sa (Flash) in one Fla (HTML5)	fety ash file	Player		•	Browse
Executa	able (EXE	h + HTML5)) ile app ①	J	Click the "Start Qu procee	uiz" button to) Start Quiz

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

Compression	Advanced	Learning Course			
Publish for V	Veb (High-s	peed connection)		▼ 듺	Save Preset
Compression					
mart (PNG + JF	PEG)	Small size		80%	High quality
ossy (JPEG only)				0
ossless (PNG or	nly)				
Compression					
l size			50%		High quality
	1 I		, , , ,	1 1 1	1 I I I I
Compression					
l size			50%		High quality
			-0		
	Publish for V Compression mart (PNG + JF ossy (JPEG only ossless (PNG of Compression	Publish for Web (High-s Compression mart (PNG + JPEG) ossy (JPEG only) ossless (PNG only) Compression I size	Publish for Web (High-speed connection) Compression mart (PNG + JPEG) Small size ossy (JPEG only) ossless (PNG only) Compression I size Compression I size	Compression mart (PNG + JPEG) Small size pssy (JPEG only) pssless (PNG only) Compression I size 50% Compression I size 50%	Publish for Web (High-speed connection) Compression mart (PNG + JPEG) Small size sss(JPEG only) compression l size 50% compression l size 50% l size 50%

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

General Compression Advanced Learning Course	
Content Properties Fit to window Size: 720 x 540 pixels Scale: 100 % HTML5 Properties Extended audio and video compatibility ①	Flash Movie Properties Flash Movie Control Flash version: Flash 10 Frame rate: 24 Disable Flash menu Disable "Print" option
On restart: Always start over	

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

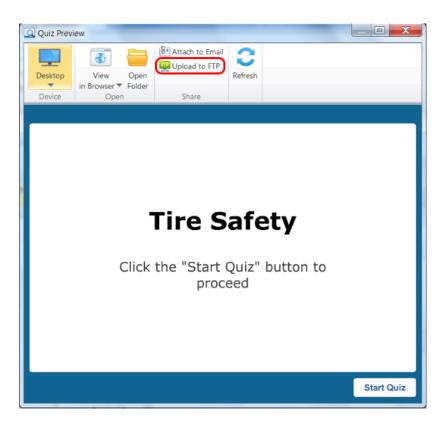
Title:		-	
Lesson title:			
Description:			•
Keywords:			

- 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.

🚆 Upload to FTP		×
FTP Accounts:		
		New
		Edit
		Delete
	Upload	Cancel

- 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**.

FTP Account		X
Host name (e.g. mysite.com):		Port:
itps://xxx.xx.xxx		21
Vse encrypted connection via SSL Folder on FTP server:	/TLS	
User name:	Password:	
X0000000X	******	
Test	ОК	Cancel

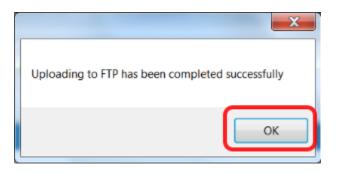
Your FTP account information is now entered and working properly. It will not need to be entered again.

• Click Upload.

🗮 Upload to FTP	×
FTP Accounts:	
ftps://xxx.xx.xxx/	New
	Edit
	Delete
	pload Cancel

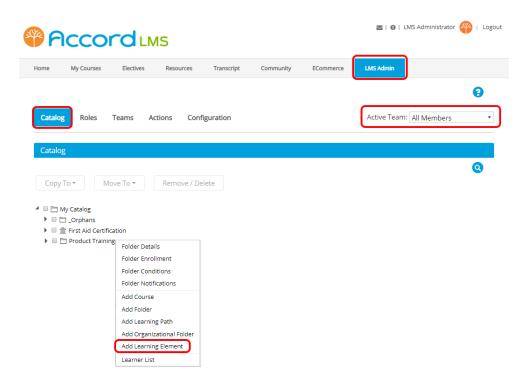
An **Uploading to FTP has been completed successfully** message will display.

• 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**.

Element Source: 🚯	SCORM
SCO: * 🕦	Select
	- or -
[Tire Safety.zip 🔻
	Unpack Preloaded SCO ZIP Package
	Notes: - Your maximum file upload size is 1048576Kb, please read the user's guide for more details. - Bulk upload of SCO ZIP Packages can be FTPed to /DesktopModules/Interzoic.AccordLMS/Portals/0/492/Learning_Objects/ZIP/
Location to Complete: 🚯	
Directory Name:	
Learning Element Type: * 👔	< Select a Learning Element Type >
Expected Duration: 🕦	Minutes
Version History: 🕕	
Education Activities	

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

Learning Catalog
Copy To • Move To • Remove / Delete
A 🗋 🗁 My Catalog
Orphans
🔺 🗌 🗁 LMS Learner Training
🗆 🕦 LMS - Definition of Term 🛛 💥
🗆 🖥 Community Features
🗆 🧟 Learner Support Group 💥
🗆 🥖 LMS Learner Quiz 🍋
Accord Learner Training Workshop
🗆 🚖 Assignment Upload
🗆 🗐 Complementary study material 💃
🗌 💋 Tire Safety
LMS Admin Training
New Employee Orientation

Create an iSpring Course

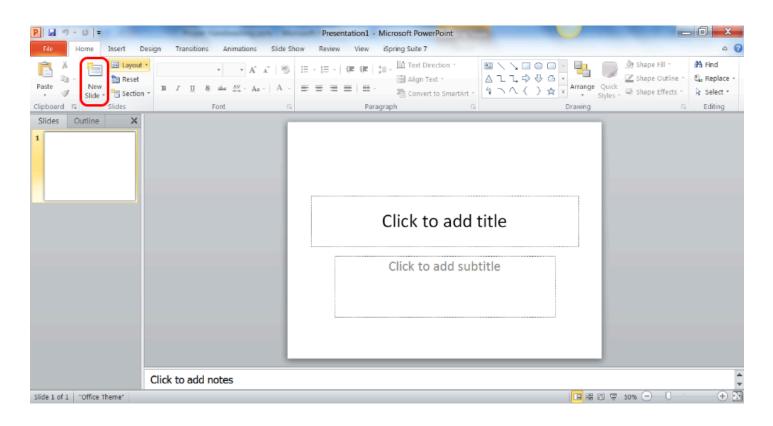
- Open Courses.
- Select **Create Course**. This will open the PowerPoint program.

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

X Quick Start			X
🔆 iSpring S	Suite		
Courses	Create New	Recent Courses	
Quizzes	Create Course	┢ Browse	
Interactions			
•		?	Q
Video Tutorial	ls Community Forum	Knowledge Base	Support

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 <u>iSpring Support</u> for assistance.



Publish the iSpring Course

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

P. 🖬	"7 · U	Pro	per Handwashing.pptx - Mic	crosoft PowerPoint		Drawing Tools		
File	Home	Insert Design Trans	itions Animations Slide Sh	how Review View	iSpring Suite 7	Format		۵ 🕜
		Resources Presenters	🔍 🔮 🕚 🚺	🗹 🗹 🚯	You 💿	1 🕄 🕄	i 🔎	
Preview	Publish	Presentation Explorer Export	Record Record Manage Q Audio Video Narration	Quiz Interaction Character	YouTube Web F Object M	Flash Help Updat	te About Activate	
Pu	ublish	Presentation	Narration	Inser	t	A	About	

The **Publish Presentation** settings will display.

• Ensure the LMS tab on the left is selected.



Accord LMS

- 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.

General	Playback a	nd Navigation	Compression	Advanced	Protection	Learning Course	
Present	tation title:	Proper Emp	oyee Hand Wa	ashing			
Local fo	older:					•	Browse
Slide	Range		Play	yer			
() A	ll slides		U	niversal (F	ull)	•	Customize
© s	elected slide	es (1 slide)					
Outpu	t Options		Ras	anarzen Prosonitor Info	Marker Tools		
() D	esktop (Flas	sh)					
	All in one						Presonior Video
							OUTLINE NOTES
Õ	Iobile (HTML		n 💷				1. First side tille
0 C	ombined (Fl	ash + HTML5)	J				
© E	xecutable (E	XE)					2. Becord slide Slite
U	se iSpring M	1obile app 🕕					
🔽 Z	ip output			0.00	^{(00.01}		PREV NEXT

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

Genera	al Pla	back and	d Navigation	Compression	Advanced	Protection	Lear	ning Course		
Pla	yback (Options -								
Pr	eset:	Custom					•	📙 Save Pr	eset	😨 Delete
~	Start	presenta	tion automati	cally						
	Chan	je slides	automatically	1						
	Minim	ium slide	duration	5.0 seconds						
	Auto	play on-c	lick animatior	ns each 2.0	seconds					
	Loop	presental	tion							
Or	n resta	rt: Alwa	ays resume							•
Nav	vigatior	0 Options								
Na	avigatio	n type:	Free - view	slides in any or	rder					•
v	Enabl	e zoomin	g with gestur	res						
1	Advar	nce with g	gestures or m	nouse click						
1	Enabl	e keyboa	rd navigation							
	Cust	tomize co	ontrol keys							

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

neral P	Playback and Navigation	Compression A	dvanced Prote	ction Learning Co	urse
Preset:	Custom			▼ 🔚 Sa	ave Preset
Image (Compression				
🔘 Sm	art (PNG + JPEG)	Small size		80%	High qualit
O Los	ssy (JPEG only)				
OLos	sless (PNG only)				
🗸 Opt	timize images for resolu	tion: 1024 x 768	•		
Audio C	Compression				
Small si	ize		50%		High qualit
I			, , ,		· · · · · ·
Video C	ompression				
Small si	ze		50%		High quality
			-0		
1			I Î I		т т т т т

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

General Playback and Navigation C	Compression Advanced	Protection Learning Course
Content Properties		Flash Movie Properties
Fit to window		Detach Media Content
Size: 720 X 540	pixels	Flash movies
Scale: 100 %		Video clips
Background:		Audio files
Multimedia Objects Processing		Flash Movie Control
Advanced SmartArt processin	ıg	Flash version: Flash 10 🔻
Enable slide video controls		Frame rate: 24
Generate narration files for ea	ach slide	Disable Flash menu
HTML5 Properties		Disable "Print" option
Extended audio and video con	npatibility 🕡	
		Preloader
		Add preloader Flower

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

	n Watermark Id watermark				
				n 0 0 0 0 0 0	Transparency Opaque 0% Transparent
0	Browse Remove	ae on mouse c	lick		
	http://		[Open link	k in a new browser window
	ord Protection otect presentation with a	password		Time Res	ay after
	assword:				ay until
C	onfirm password:				
_	n Restriction low playback in the follow	ing domains or	nly (e.g. my	site.com;mi	irror1.othersite.com;localhost)

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

neral Playba	ck and Navigation	Compression	Advanced	Protection	Learning Cours	e	
Туре:	SCORM 2004	•	4th Edition	•)		
Title:							
Lesson title:							
Description:							•
Keywords:							
	ess and Completion nber of slides viewe		▼ of 1			Weight:	1
Rate quiz	ZZES Rate Title				Score	Passing 9	% Weight
Max score:	100	Custom pa	issing score:	100			
Lesson dura	tion: 01:00:00						

- 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.

Upload to FTP	X
FTP Accounts:	
	New
	Edit
	Delete
	Upload Cancel

- 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.

FTP Account		X
Host name (e.g. mysite.com):		Port:
itps://xxx.xx.xxx		21
✓ Use encrypted connection via SSL, Folder on FTP server:	/TLS	
User name:	Password:	
X0000000X	*******	
Test	ОК	Cancel

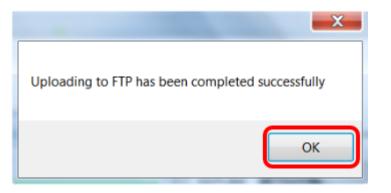
Your FTP account information is now entered and working properly. It will not need to be entered again.

• Click Upload.

	X
FTP Accounts:	
ftps://xxx.xx.xxx/	New
	Edit
	Delete
Upload	Cancel

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.

(

Pacco					🔤 🛛 LM5 Administrator 🧳	P Logout
Home My Courses	Electives Resources	Transcript	Community	ECommerce	LMS Admin	
	Teams Actions Conf	iguration			Active Team: All Members	•
Catalog Copy To * Mo	ove To 👻 Remove / De	elete				0
 Inst No Certific Product Trainin 						

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**.

Element Source: 👔	SCORM V
SCO: * 🚺	Select
	- or -
	Proper Employee Hand Washing.zip 🔻
	Unpack Preloaded SCO ZIP Package
	Notes: - Your maximum file upload size is 1048576Kb, please read the user's guide for more details. - Bulk upload of SCO ZIP Packages can be FTPed to /DesktopModules/Interzoic.AccordLMS/Portals/0/492/Learning_Objects/ZIP/
Location to Complete: 🕧	
Directory Name.	
Learning Element Type: * 👔	< Select a Learning Element Type >
Expected Duration.	Minutes
Version History: 🖚	

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

Learning Catalog
Copy To + Move To + Remove / Delete
🔺 🗆 🗁 My Catalog
Orphans
🛃 🗆 🗁 LMS Learner Training
🗌 👔 LMS - Definition of Term 🛛 🎇
🗆 🖥 Community Features
🗆 🧟 Learner Support Group 🎉
🗆 🥖 LMS Learner Quiz 🍋
Accord Learner Training Workshop
🗌 👚 Assignment Upload
🗌 🗐 Complementary study material 🎉
🗌 🚳 Tire Safety
🗆 🥒 Proper Employee Hand Washing
New Employee Orientation

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.

8 9	cco		S S S S S S S S S S S S S S S S S S S						平 Logout
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin		
Catalog	Roles	Teams Ac	tions Confi	guration			Active Team	All Members	•
Teams									Count
All M 🎯 🔺	embers earners								5
	eport Admin								0
L Te	eam Admin								3

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.

General Settings only one Team available for the current LMS Admin. Hide Active Team: Image: Contract of the current LMS Admin. Learner Search List Limit: 1000 Bulk Import Report Storage: 30 Days	General Options	ا الر	Hide Active Team if there is
Learner Search List Limit: 1000	General Settings		, ,
		Hide Active Team: 🕦	
Bulk Import Report Storage: 🚯 🛛 30 Days	Learne	er Search List Limit: 🚺	1000
	Bulk Imp	ort Report Storage: 🕕	30 Days

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.

Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin					
Catalog Roles Teams Actions Configuration	Active Team: All Members Count					
All Members Learners In Report Admin	5					
L Team Admin	3					

A **More Information** link may display, allowing access to online documentation for further examples or explanations.

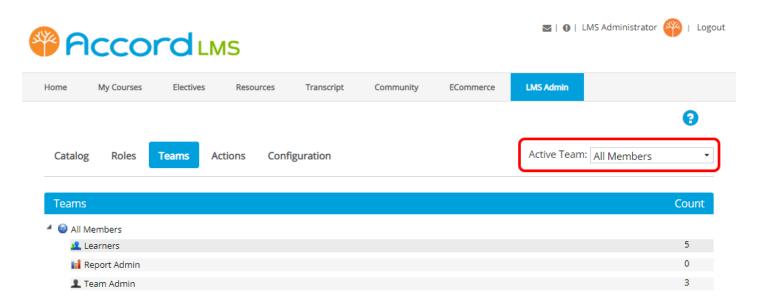
					•
 Add n 	rted with T on Team, L new Learne existing Lea	Hide this Box			
					More Information
Catalog	Roles	Teams	Actions	Configuration	Active Team: All Members 🔹

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**.

P	cco		IS				🜌 🛛 LMS Administrator 🍄 Logou			
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin			
								8		
Catalog	Roles	Teams Ac	tions Confi	guration			Active Team: All Me	mbers 🔹		
Teams								Count		
🔺 🎯 All N	lembers									
🕰 L	earners							5		
🖬 R	eport Admin							0		
2 T	eam Admin							3		

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**.

Pccord LMS	🛛 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog Copy To Move To Remove / Delete	0
 My Catalog Sample - Accord LMS Content Sample - LMS Learner Training Welcome to the Accord LMS 	
Accord LMS Learner Experience Accord Learner Training Workshop	
□ 2/ LMS Sample Learner Quiz 🌪 □ 🖋 Course Evaluation Survey 🍋	
Certificate of Completion Certificate of Completion Proper Workplace Conduct Proper Handwashing	

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.

Pccord LMS	🛛 🕢 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
_	0
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog	
Copy To 👻 Move To 👻 Remove / Delete	0
 My Catalog Sample - Accord LMS Content 	
Sample - KCON Lind Content Sample - LMS Learner Training	
🖌 🔲 🔄 Sample - LMS Admin Training	
Introduction	
C I I Accord Academy Sample Lessons	
Compared Admin Documentation and Resources	
🗌 🥒 LMS Admin Sample Quiz	
Cample - LMS Learner Resources	
C Sample - SCORM Content Boston Office	
Boston Onice Carrier Courses	

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**.

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Home	e My Courses	Electives	Resource	ces Transcript	Community	ECommerce	LMS Admin	
Catalog Roles Teams Actions Configuration								
Ro	oles						_	
		Filter by Rol	e Group: 📵	<global roles=""></global>			•	
	Name	Rules	Count	Activation Date	Start Date	Due Date	Expiration Date	Re-Activation Date
Ø	Administrative Staff		0	Immediate	Immediate	None	None	None
Ø	Registered Users		5	Immediate	Immediate	None	None	None
2	Unverified Users		1	Immediate	Immediate	None	None	None
2	Warehouse Staff		0	Immediate	Immediate	None	None	None
Add New Group Add New Role Bulk Learner Assignment								

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.

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Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
								0
Catalo	og Roles	Teams A	Actions Confi	guration			Active Team: All Members	•
Team	S							Count
🔺 🎯 All	Members							
	Learners							5
	Report Admin							0
*	, Team Admin							3
	Blue Ribbon Home	-						
-	Boston Office-North	h						
▶ 🥹	Engineering Crew							

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.

P	ссо		5				🔤 🛛 LMS Admini	strator 🍄 Log
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
Catalog	Roles	Teams Actio	ns Confi	guration			Active Team: All Mem	G bers •
Learnin	g Catalog							~
	-							©
		Active Te	am: 🚯 🛛 All M	embers				
		All Team Memb	ers: 🚯 🗌					
		Learning Ro	►	Global Roles Boston-North C LMS Example Le Translation Role	earning Roles			
		Learn	ers: 🕦 🛛 S	how Search				
Actions								\sim
		Select Act	ion: 🚺 < S	elect Action >	~			

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.

Pccord LMS	🕿 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Configuration	
General Options	
Notifications	
Folder Types	
6 Learning Element Formats	
🖋 Status Types	
Education Activities	
K ILT Resources	
Role Based Redirection	
Import Data	
P Enhanced Feature Status	
> Integration	
License Key and Details	

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).

Pccord LMS	🗷 🧖 Mary Jones 🍄 Logout
Home My Courses Catalog Resources Transcripts Community ELearning Store	LMS Admin UI Patterns
	9
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog	
Copy To • Move To • Remove / Delete	0
 My Catalog Orphans First Aid Certification Primary Assessment Rergency Care Energency Care First Aid Basics First Aid Basics Infectious Diseases OSHA Curses OSHA - Basic Respiratory Protection OSHA - Heat Stress 	
OpenSesame	>

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.

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Home My Courses Catalog Resources Transcripts Community	ELearning Store	LMS Admin	UI Patterns	
				0
Catalog Roles Teams Actions Configuration		Active Team:	All Members	•
Catalog				
Copy To 👻 Move To 👻 Remove / Delete				Q
▲ ■ The My Catalog				
🕨 🗐 _Orphans				
Tirst Aid Certification Tirst Aid Certification Self-Enrollment Catalog - Health Care				
OSHA Driver Safety				
First Aid and CPR Refresher				
▶				

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

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Home My Courses Catalog Resources Transcripts Community ELearning Store	e LMS Admin UI Patterns
	0
Catalog Roles Teams Actions Configuration	Active Team: All Members 🔹
Catalog	
Copy To • Move To • Remove / Delete	0
 My Catalog orphans 	
 ✓	
 Elf-Enrollment Catalog - Health Care OSHA Driver Safety 	
 ■ 〒 First Aid and CPR Refresher ■ 金 New Hire Training 	
OpenSesame	>

• 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.

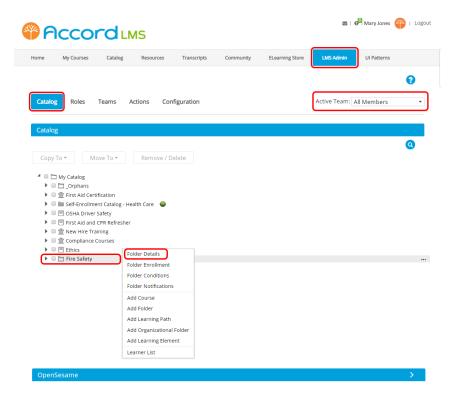
A given storage folder's properties are set up within the **Details** panel when creating new Catalog folders or updating existing Catalog folders.

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.

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*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.

General Se		ing Path, Organizational Folder, Learning Element
General De		
		Fire Safety
	Description: 0	
	(+ • <u>@</u> • B I <u>U</u>	
	Design HTML	
Advanced	Settings	
	Folder Type: 🛛	Folder
	Custom Icon:	
		Drag and Drop a File or Select an Option
	Local Id: 0	Drag and Drop a File or Select an Option
		Drag and Drop a File or Select an Option
		Drag and Drop a File or Select an Option
	Folder Id: 🖲	Drag and Drop a File or Select an Option
	Folder Id: 0 Reference 1: 0 Reference 2: 0	Drag and Drop a File or Select an Option 76 5568eecc-4ad8-4911-8555-c46a74ded709
	Folder Id: 0 Reference 1: 0	Drag and Drop a File or Select an Option 76 5568eecc-4ad8-4911-8555-c46a74ded709
Scoring	Folder Id: 0 Reference 1: 0 Reference 2: 0	Drag and Drop a File or Select an Option 76 5568eecc-4ad8-4911-8555-c46a74ded709
Scoring	Folder Id:	Drag and Drop a File or Select an Option 76 556Beecc 4ad8-4911-8555-c46a74ded709 Open Folder
Scoring	Folder Id: 0 Reference 1: 0 Reference 2: 0	Drag and Drop a File or Select an Option 76 556Beecc 4ad8-4911-8555-c46a74ded709 Open 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.

P	ICCO		NS				🗷 🗗 IZMAdmin	ү Logout
Home	My Courses	Catalog	Resources	Transcript	Community	ECommerce	LMS Admin	
Catalog	Enrollment	Roles	Teams Co	onfiguration				0
							Active Team: All Members	- Q
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r 🗆 🗆	New Employee C	nentation						

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.

Pccord LMS	🔤 । 🗗 Mary Jones	🍄 Logout
Home My Courses Catalog Resources Transcripts Community ELearning Store	LMS Admin UI Patterns	
Catalog Roles Teams Actions Configuration	Active Team: All Members	•
Catalog Copy To Move To Remove / Delete		0
 My Catalog Orphans first Aid Certification self-Enrollment Catalog - Health Care OSHA Driver Safety SIFINITY Aid and CPR Refresher New Hire Training Compliance Courses SIFINICS 		
Document Upload Managing Performance New Employee Orientation (ILT) Regional Webinars Resources Important Company Links		

- 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'.

Pccord LMS	🕿 🗗 Mary Jones 🍄 Logou
Home My Courses Catalog Resources Transcripts Community ELearning Store	LMS Admin UI Patterns
Catalog Roles Teams Actions Configuration	Active Team: All Members 🔹
Catalog	fire Q
Copy To • Move To • Remove / Delete	
GSHA Driver Safety Grist Aid and CPR Refresher	
Compliance Courses Ethics	
Document Upload Managing Performance	
Carlos New Employee Orientation (ILT) Carlos Regional Webinars Carlos Resources	
Important Company Links	

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.

P			۸S				M	🗗 Mary Jones 🌘	🍟 Logout
Home	My Courses	Catalog	Resources	Transcripts	Community	ELearning Store	LMS Admin	UI Patterns	
Catalog		Teams A	ctions Con	figuration			Active Team: .	All Members	•
Catalo Expand	g All Folders List Al	I Learning Elem	ients				fire		Q
 ▲ ■ ■ 	Catalog (6) New Hire Training Workplace Safety OpenSesame (der Team 1 (2)	(1)							

• 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.

	🛛 🗗 Mary Jones 🍄	Logout
Home My Courses Catalog Resources Transcripts Community ELearning Store	LMS Admin UI Patterns	
Catalog Roles Teams Actions Configuration	Active Team: All Members	•
Catalog		
Collapse All Folders List All Learning Elements	fire	0
 My Catalog (6) New Hire Training (1) Policies & Procedures (1) Fire Safety Classroom Training Workplace Safety (1) OpenSesame (demo) (2) Safety (2) Fire Safety (1) Portable Fire Extinguisher Safety OSHA (1) Portable Fire Extinguisher Safety Team 1 (2) Fire Safety (1) Fire Safety (1) Fire Safety (1) 		
Fire Safety Questions and Forms (1) Fire Safety - Questions		

For more information regarding the Search function, please review the <u>General</u>
 <u>Options</u> 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.

P	ccord	LMS				🛛 🛛 LMS Admini	strator 🍄 Logout
Home	My Courses Elective	es Resources	Transcript	Community	ECommerce	LMS Admin	
Catalog		Actions Confi	guration			Active Team: All Mem	e vers e
	To ▼ Move To ▼	Remove / De	lete				٩

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.

Pccord LMS	🛛 🕢 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog Copy To Move To Remove / Delete	0
 My Catalog Orphans First Aid Certification Self-Enrollment Catalog - Health Care OSHA Driver Safety OSHA Driver Safety First Aid and CPR Refresher New Hire Training Compliance Courses 	
OpenSesame	>

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.

- 🔺 🗉 🗏 First Aid and CPR Refresher
 - 🗆 🍪 NIH AED Information
 - Instructor Led CPR Training
 - 🗆 🖥 Flash Video Learning Element
 - 🗆 🥖 Final Exam 🎨

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.

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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: <u>http://help.accordlms.com/</u> <u>m/11168/c/51327</u>

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ome	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin		
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Learn	ing Catalog			Baradon					~
				Baradon					× Q
4 🗆 M	y Catalog								
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 ▲ ■ M, ▶ ■ ▶ ■ 	y Catalog) 🏦 First Aid Ce) 💼 Self-Enrollr	rtification nent Catalog - He		Balaash					
 M M I I<	y Catalog ① First Aid Ce] Self-Enrollr] OSHA Drive	rtification nent Catalog - He							
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 M M	y Catalog) First Aid Ce Self-Enrollr OSHA Drive First Aid an	rtification nent Catalog - He er Safety d CPR Refresher raining							

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.

Pccord LMS					⊠ 0	LMS Administrator	🍄 Logout		
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin		
									8
Catalog	Roles	Teams A	ctions Con	figuration			Active Team	: All Members	•
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Сору	To • M	ove To 🕶	Remove / D	elete					0
▶ □ 🖿 N	/ly Catalog								
OpenS	esame								>

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.

Accord LM5

Catalog Roles Teams Actions Configuration	Active Team: All Members 🔹
Catalog	
Copy To 🕶 Move To 👻 Remove / Delete	Q
 My Catalog Orphans First Aid Certification Self-Enrollment Catalog - Health Care OSHA Driver Safety 	
 First Aid and CPR Refresher 	•••
 First Q Glossary of Terms Q 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	0
 My Catalog Orphans First Aid Certification Self-Enrollment Catalog - Health Care OSHA Driver Safety First Aid and CPR Refresher Rew Hire Training Compliance Courses Ethics 	
 Learner Experience Community Features 	
Enrollment Overview	
 	
🗹 🥖 Image Scalability Quiz	

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**.

Catalog	Roles Teams	Actions	Configuration		Active Team: All Members	•
Catalog						
Сору То	• Move To •	Remo	ve / Delete			Q
▲ □ ⊡ My ▶ □ ⊡ _ ▶ □ ⊟ h	Orphans					
	Accord LMS Example (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.

Accord	LMS	🛎 🛛 LMS Administrator 🍄 Logout
Home My Courses Elective	s Resources Transcript Community Ed	Commerce LMS Admin
Catalog Roles Teams	Actions Configuration	Active Team: All Members
Catalog Copy To * Move To *	Remove / Delete	0
 ▲ My Catalog ▶ □Orphans ▶ □First Aid Certification ▶ □OSHA Driver Safety 	Folder Details Folder Enrollment Folder Conditions Folder Notifications	
	New Course New Folder New Learning Path New Organizational Folder New Learning Element	

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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.

New Folder

Folder Allowed Child Types: Course, Folder, Learning Path, Organizational Folder, Learning Element	
General Settings	~
Name: * 🗊	
Description: 1	_
→	
Design HTML	

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.

Advanced Settings		\sim
Folder Type: 🕚 Custom Icon: 🕚	▼ Folder Control Co	
Local Id: 🕕	n/a	
Folder Id: 🖲	n/a	
Reference 1: 🕕		
Reference 2: 🕕		

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.

Scoring		\sim
Scoring Process	Roll Up	
Passing Score		
Score Weighting: 🕕	●Equal OCustom ONone	

UPDATE;

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



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**.

🍄 🖻		rd	LMS					🕿 🛛 LMS Administrator 🍄 Logout
Home	My Courses	Elective	es Res	ources	Transcript	Community	ECommerce	LMS Admin
Catalog	g Roles	Teams	Actions	Confi	guration			Active Team: All Members
Config	uration							
Ô	General Optio	ns						
	Notifications							
	Folder Types							
Ø	Learning Elem	ent Formats						
Ľ	Status Types							
	Education Acti	vities						
st	ILT Resources							
-	Role Based Re	direction						
	Import Data							
<u> </u>	Enhanced Fea	ture Status						
→	Integration License Key ar	nd Details						
2/								

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

Folder Types

	Icon	Name	Scoring Process
2	φ	Chapter	Pass Through
0	20	Collection	Pass Through
2		Course	Roll Up
0		Folder	Roll Up
2	盫	Learning Path	Roll Up
	-	Organizational Folder	Roll Up

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 Folder Type Name: * I Organizational Folder Icon Small: * I FlatFolder-16x16.png Icon Medium: * FlatFolder-24x24.png Icon Large: * I FlatFolder-32x32.png Icon X-Large: * I FlatFolder-48x48.png Icon X-Large: * I FlatFolder Icon X-La					
Icon Small: • I FlatFolder-16x16.png Icon Medium: • I FlatFolder-24x24.png Icon Large: • I FlatFolder-32x32.png Icon X-Large: • I FlatFolder-48x48.png Icon X-Large: • I FlatFolder-48x48.png Icon X-Large: • I O Drill Down I Expanded Icon X-Large: • I O Drill Down I Expanded Icon X-Large: • I O Drill Down I Expanded Icon X-Large: • I O Drill Down I Expanded Icon X-Large: • I O Drill Down I Expanded Icon X-Large: • I O Drill Down I Expanded Icon X-Large: • I Colder is Not Visible to Learners Scoring Process: I I Collection Icollection Collection Icollection Course	~				Folder Type Details
Icon Medium: * FlatFolder-24x24.png Icon Large: * FlatFolder-32x32.png Icon X-Large: * FlatFolder-48x48.png Icon X-Large: * Collection Child Types: Course Course		±	±	Organizational Folder	Folder Type Name: * 🖲
Icon Large: * FlatFolder-32x32.png Icon X-Large: * FlatFolder-48x48.png Learner Presentation: Folder is Not Visible to Learners Scoring Process: Roll Up Pass Through Child Types: Child Types: Collection Course				FlatFolder-16x16.png *	Icon Small: * 🖲
Icon X-Large: * FlatFolder-48x48.png Learner Presentation: Folder is Not Visible to Learners Scoring Process: Roll Up Pass Through Child Types: Child Types: Child Types: Child Types: Course				FlatFolder-24x24.png	Icon Medium: * 🛽
Learner Presentation: Drill Down Expanded Folder is Not Visible to Learners Scoring Process: Child Types: Child Types: Child Types: Collection Course Course				FlatFolder-32x32.png	Icon Large: * 🛽
 Folder is Not Visible to Learners Scoring Process: Roll Up Pass Through Child Types: Chapter Collection Course 				FlatFolder-48x48.png *	Icon X-Large: * 🖲
Scoring Process:			_	Orill Down	Learner Presentation: 🖲
Child Types: Chapter Collection Course			;	Folder is Not Visible to Learners	(
□ Collection ☑ Course			-	Roll Up Pass Through	Scoring Process: (1)
✓ Course				Chapter	Child Types: 🖲
				Collection	
₿ Folder				Z Course	
				✓ Folder	
Learning Path				Learning Path	
Organizational Folder				Organizational Folder	
Learning Element				Learning Element	



Folder Type Details

<u>UPDATE;</u>

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.

Pccord	LMS			🖀 🛛 LMS Administrator 🍄 Logout
Home My Courses Elective	es Resources Transcript	Community	ECommerce	LMS Admin
Catalog Roles Teams	Actions Configuration			Active Team: All Members
Catalog				
Copy To 👻 Move To 👻	Remove / Delete			0
 ➡ ☐ My Catalog ➡ ☐ _Orphans ➡ ① First Aid Certification ➡ ☐ OSHA Driver Safety 	Folder Details Folder Enrollment Folder Conditions Folder Notifications New Course New Folder New Learning Path			
	New Organizational Folder New Learning Element			

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.

New Learning Path

Allowed Child Types: Collection, Course, Learning Element	
General Settings	\sim
Name: * 🖲	
Description: ()	
Design HTML	

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.

Advanced Settings		\sim
Folder Type: 🕚 Custom Icon: 🕚	▼ Folder Control Co	
Local Id: 🕕	n/a	
Folder Id: 🖲	n/a	
Reference 1: 🕕		
Reference 2: 🕕		

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.

Scoring		\sim
Scoring Process	Roll Up	
Passing Score		
Score Weighting: 🕕	●Equal OCustom ONone	

UPDATE;

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



Collections

Collection Allowed Child Types: Course, Learning Element

A Collection is a type of hierarchical Learning Catalog Folder which can contain subfolders; 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**.

Catalog Roles Teams Actions	Configuration	Active Team: All Members 🔹
Catalog		
Copy To • Move To • Remo	ove / Delete	0
► □	Learning Path Details Learning Path Enrollment Learning Path Conditions Learning Path Notifications - New Collection New Course Learner List	**

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.

New Collection	
Collection Allowed Child Types: Course, Learning Element	
General Settings	\sim
Name: * 🖲	
Description: ()	
$\begin{array}{c c c c c c c c c c c c c c c c c c c $	
Berlan 1971	
Design HTML	

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.

Advanced Settings		\sim
Folder Type: ① Custom lcon: ①	Folder ▼ C: C: C: X Drag and Drop a File or Select an Option Image: C: C: C:	
Local Id: 🕕	n/a	
Folder Id: 🕚	n/a	
Reference 1: 🕕		
Reference 2: 🕕		

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.

Scoring		~
Scori	ng Process 🕘 Pass Through	

<u>UPDATE;</u>

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

Update Cancel

Courses

_	_
_	-
_	-

Course

Allowed Child Types: Chapter, Learning Element

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.

Catalog Roles Teams Actions	Configuration	Active Team: All Members 🔹
Catalog		
Copy To * Move To * Remo	ove / Delete	0
Image: Second		•••
	Learning Path Details Learning Path Enrollment Learning Path Conditions Learning Path Notifications New Collection New Course Learner List	

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.

New Course	
Course Allowed Child Types: Chapter, Learning Element	
General Settings	\checkmark
Name: * 🕕	
Description: 1	
• • • • • • • • • • • • • • •	1
Design HTML	

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.

Advanced Settings		\sim
Folder Type: 🕚 Custom Icon: 🕚	▼ Folder Control Co	
Local Id: 🕕	n/a	
Folder Id: 🖲	n/a	
Reference 1: 🕕		
Reference 2: 🕕		

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.

Scoring		\sim
Scoring Process	Roll Up	
Passing Score		
Score Weighting: 🕕	●Equal OCustom ONone	

UPDATE;

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



Chapters

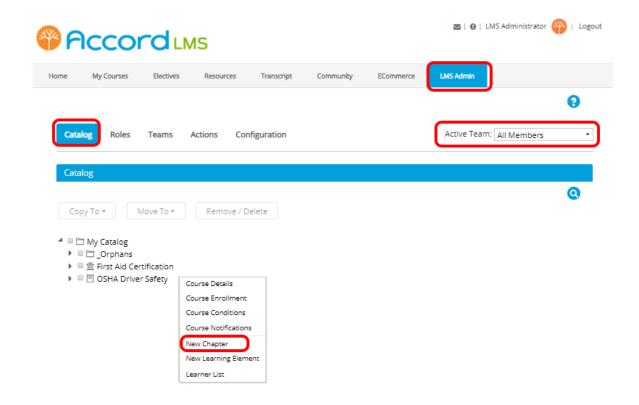


Chapters are types of hierarchical Learning Catalog Folders which can contain Learning Elements.

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.

New Chapter	
Chapter Allowed Child Types: Learning Element	
General Settings	\sim
Name: * 🕕	
Description: 🕕	
Image: Image	
Design HTML	

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.

Advanced Settings		\sim
Folder Type: 🖲 Custom Icon: 🖲	Folder ▼	
Local Id: 🕕	n/a	
Folder Id: 🖲	n/a	
Reference 1: 🕕		
Reference 2: 🕕		

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.

Accord LMS

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.

Catalog Roles Teams Actions Configuration	n	Active Team: All Members 🔹
Catalog		
Copy To * Move To * Remove / Delete		0
 My Catalog Corphans Inidden Accord LMS Example Folder Details 		
Folder Details Folder Enrollment Folder Conditions		
Folder Notifications		
New Course New Folder		
New Learning Path		
New Organizational Folder		
New TestFolderType		
New Learning Element		
Learner List		

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

eneral Setti	ngs
	Name: * 🕕 Accord LMS Example Courses
	Description: 1
	Image:
	Accord LMS.
	Design HTML

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.

Scoring	\checkmark
Scoring Process 🔍 Roll Up	
Passing Score	
Score Weighting:	©None
Update Delete Cancel	

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.

Catalog Enrollment	Roles Teams Configur	ration	Active Team: All Members	•
Catalog				
Copy To * Move To	Remove / Delete		0)
 My Catalog Crphans And Annual Annua 				
🕨 🖻 🖿 Accord LMS Examp	Folder Details Folder Enrollment Folder Conditions Folder Notifications			1
	New Course New Folder New Learning Path			
(New Organizational Folder New TestFolderType New Learning Element Learner List			

Accord LMS

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.

Learner List

Drag a column head	er and drop it here to group by	that column		
Username	Enrollment Type	Folder Title	Rolename	Team
± T	T	T	T	T
aimfeld	Role Folder Enrollment	Rick's Test Folder	Nightshift	All Members
alasmi	Role Folder Enrollment	Rick's Test Folder	Nightshift	All Members
AMarquez	Role Folder Enrollment	Rick's Test Folder	Nightshift	All Members
bbish	Role Folder Enrollment	Rick's Test Folder	Nightshift	All Members
izmadmin	Learner Folder Enrollment	Rick's Test Folder		

Return

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

Learners				~
Drag a column hea	ader and drop it here to gro	up by that column		
Username	Enrollment Type	Folder Title	Rolename	Team
nelson 🗎 🖿	NoFilter		T	T
Amarquez	Contains	Fire Safety	Open Sesame Plus	All Members
Amarquez	DoesNotContain StartsWith	Fire Safety	Registered Users	All Members
Arideout	EndsWith	Fire Safety	Registered Users	All Members
ArtieA	EqualTo	Fire Safety	Registered Users	All Members
Bdavidson	NotEqualTo GreaterThan	Fire Safety	Registered Users	All Members
beckym	LessThan	Fire Safety	Registered Users	All Members
beckyw	GreaterThanOrEqualTo	Fire Safety	Registered Users	All Members
beckyy	LessThanOrEqualTo Between	Fire Safety	Registered Users	All Members
beckyz	NotBetween	Fire Safety	Registered Users	All Members
Bev Director	lsEmpty NotIsEmpty	Fire Safety	Registered Users	All Members
bill	IsNull	Fire Safety	Registered Users	All Members
BJones	NotisNull	Fire Safety	Registered Users	All Members

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

Learner List

Learners				\sim
Drag a column header	and drop it here to group b	by that column		
Username	Enrollment Type	Folder Title	Rolename	Team
nelson 🗄 🍸	T	T	T	T
Nnelson	Role Folder Enrollment	Fire Safety	Registered Users	All Members
K < 1 > H 20	•			

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 restarted, 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.

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.

Accord LMS

Catalog Roles Teams Actions	Configuration	Active Team: All Members	•
Catalog			
Copy To Move To Remove Move To Remove	e / Delete		0
🕨 🗎 _Orphans			
 			
 First Aid Basics Cardiopulmonary Resuscitation (CPf First Aid Basics Part II (US) Manual Material Handling and Back 	Folder Details Folder Enrollment Folder Conditions Folder Notifications		
	Add Course Add Folder Add Learning Path Add Organizational Folder Add Learning Element Learner List		

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.	
G 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.

Presentat	ion	
	ompliant presentations	or demonstrations.
General Setti	ngs	
	Name: * 🛙	E
Learr	ing Element Format: 🕕	Presentation - Only Completion - Modal Window *
	Vindow Dimensions: 🛈	
	Enable Proctoring: 🕕	
	Description: ()	
	+ • <u>•</u> • B I <u>U</u>	
	Design HTML	
	SCO: * 🛛	Select
		- or -
		1e8b685d-75e8-5e74-f13e-e7
		Unpack Preloaded SCO ZIP Package
	Version History: 🛈	
Advanced Se	ttinge	
Advanced Se		
Advanced Se Remote SCO Education Ac	-	

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.

Accord LMS

- **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.

dvanced Settings		×
Learning Element Type: 0	SCORM Presentation	
Utilization Tracking: 0	Provided by SCO	
Element Storage: 0	. Torraca by Sec	
Location to Complete: 0		
Directory Name: 🛽		
Expected Duration: 🕕		
LEID: 🕕	n/a	
Local ID: 🛽	n/a	
Reference: 0		
Status: 0	●Active ◎Inactive	
Views: 0		
Publish Date: 🕚		
Unpublish Date: 🕚		
Tags (separated by commas): 🕕		
Utilized in Folders: 0		
Guized in Folders.		
emote SCO		
ducation Activities		
adcation Activities		

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; <u>http://help.accordlms.com/m/11168/l/1186592-remote-sco-learning-content</u>

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.

Education Activities	× .
Award Requirements: 🕚	Complete or Pass 🔹
APA: 🕚	
ASWB: 0	
CPRP: 0	
Education Units: 🕕	
IACET: 1	
NASW: 🖲	
PCB: 🕚	
SW: 🐠	
Workplace Conduct: 🛽	
Update Cancel	

Learner List

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

PACCORD LMS

- 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.

Catalog Roles Teams A	ctions Configuration	Active Team: All Members -
Catalog		
Copy To 👻 Move To 👻	Remove / Delete	0
 My Catalog Orphans hidden Accord LMS Example Cours LMS Admin Training LMS Admin Support G 		
Catalog Overview	LE Details LE Conditions & Limits LE Completion Events LE Notifications Launch LE Learner List	

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.

Learner List

			X			
Drag a column header and drop it here to group by that column						
Enrollment Type	Folder Title	Rolename	Team			
T	T	T	T			
Role Folder Enrollment	LMS Admin Training	LMS Admin Training	All Members			
Role Folder Enrollment	LMS Admin Training	LMS Admin Training	All Members			
Role Folder Enrollment	LMS Admin Training	LMS Admin Training	All Members			
Role Folder Enrollment	LMS Admin Training	LMS Admin Training	All Members			
Role Folder Enrollment	LMS Admin Training	LMS Admin Training	All Members			
Role Folder Enrollment	LMS Admin Training	LMS Admin Training	All Members			
	Enrollment Type Enrollment Type Role Folder Enrollment	Enrollment TypeFolder TitleImage: Solution of the second	Enrollment TypeFolder TitleRolenameTTTTRole Folder EnrollmentLMS Admin TrainingLMS Admin TrainingRole Folder EnrollmentLMS Admin TrainingLMS Admin Training			

Return

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

Learners							\sim
Drag a column header and drop it here to group by that column							
Username	Enrollment Type		Folder Title		Rolename	Team	
nelson 🗎	NoFilter			T	T		T
Amarquez	Contains	t	Fire Safety		Open Sesame Plus	All Members	
Amarquez	DoesNotContain StartsWith	t	Fire Safety		Registered Users	All Members	
Arideout	EndsWith	t	Fire Safety		Registered Users	All Members	
ArtieA	EqualTo	t	Fire Safety		Registered Users	All Members	
Bdavidson	NotEqualTo	t	Fire Safety		Registered Users	All Members	
beckym	LessThan	t	Fire Safety		Registered Users	All Members	
beckyw	GreaterThanOrEqualTo	t	Fire Safety		Registered Users	All Members	
beckyy	LessThanOrEqualTo Between	t	Fire Safety		Registered Users	All Members	
beckyz	NotBetween	t	Fire Safety		Registered Users	All Members	
Bev Director	lsEmpty NotIsEmpty	t	Fire Safety		Registered Users	All Members	
bill	IsNull	t	Fire Safety		Registered Users	All Members	
BJones	NotisNull	t	Fire Safety		Registered Users	All Members	

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

Learner List

Learners				\sim
Drag a column header	and drop it here to group b	y that column		
Username	Enrollment Type	Folder Title	Rolename	Team
nelson 🗄 🝸	T	Ţ	Ţ	T
Nnelson	Role Folder Enrollment	Fire Safety	Registered Users	All Members

Learning Element Types

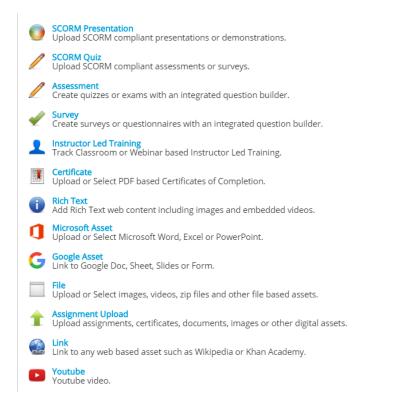
Learning Element Types are the **core** of each Learning Element. These will include; **SCORM Presentation, SCORM Quiz, Assessment, Survey, Instructor Led Training, PDF Certificate, Rich Text, Microsoft and Google Assets, URL/Page/File** or **Module**. Once selected, options will display which are appropriate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



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 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



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; <u>Assessment and Survey Authoring Tools</u>

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.

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: * 🕕	
	o 🗘 🗙
	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.

Learning Element Type: 📵	Certificate 🔹	
Utilization Tracking: 🕕	None 👻	
Reference LE: 📵	< Available Reference LE >	
Available Tokens: 🕕 Expected Duration: 🜗	< Available Reference LE > LMS Learner Training LMS Admin Training	
LEID: 🗊	OpenSesame Orientation	

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.

LE Type: 🕕	Certificate	•
Learning Element Format: * 🗊	Certificate - Modal Window - 950x650	•
Utilization Tracking: 📵	None	•
Reference LE: ①	LMS Learner Quiz	•
Available Tokens: 📵	View	
Custom Window Dimensions: 🕚	950 Width 650 Height	
Expected Duration: 🕕	Hours 15 Minutes	40 Seconds

 A full list of PDF Tokens and descriptions can be found in the <u>Certificate of</u> <u>Completion</u> section.

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

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.

Advanced Settings

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: * 🛈	
	o 🗘 🗙
	Drag and Drop a File or Select an Option

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 O 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.

P	lcco		5				⊠ 0	LMS Administrator	ү Logou	it
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin			
Repor	ts Activity	Configuration					Active Team	All Members	•	
Quick	Reports									
8	Easy Configu	ration								
	LE Activity with Learner Deta	1	< Selec	t Report Definition	> •	Continue				
Learn	ner Activity									
<u>,9</u>	 Reports grou 	ped by Roles a	and Learners	5						
	Learner Activi		< Sele	ct Report Definition	> 🗸	Continue				
	Learner Activi	ity/Transcript	< Defir	ne New Report >	~	Continue				
	Learner Activ		< Defir	ne New Report >	~	Continue				
	Learner Activi Most Active	ity	< Defir	ne New Report >	~	Continue				
	Learner Activi	ity	< Defin	ne New Report >	~	Continue				
	Learner Acco		< Defir	ne New Report >	~	Continue				

- 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**.

Di	splay Columns					~
Lea	arner Details					
	User Name		Last Name		Authorized	Portal Name
	First Name		Email			
Lea	arning Elements					
	Team		Complete		Points	Proctoring API Response
	Role		In Progress		Possible	Comments
	Due Date		Not Attempted		Passing	Manager Created Date
	Learning Folder Path		Success	✓	Duration	Created By
	Course		Passed	✓	Date	Assignment
	Folder Type	•	Failed	✓	Time	Assignment Grading
	LE Name		EA Name		Reference	Score
	Completion		EA Value		Proctoring Status	-

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

Accord LMS

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.

Learner Activity/Transcript with LE Detail

Date Range: Last 30 Days Report Generated: 6/5/2018 11:14:39 AM

Refresh

Drag a column header and drop it here to group by that column.								
User Name	First Name	Team	Folder Name	LE Name	Completion	Complete	Date	Assignment
T		T	T	T	T	T		
aahmednafea	Ahmed	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
aimfeld	Alice	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
alasmi	Azzedine	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
alpha_guest	alpha	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
alpha_guest	alpha	MM Child	Houston Office	Learner Assignment Upload	Not Attempted			
AMarquez	Alex	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
AMarquez	Alex	RB	Houston Office	Learner Assignment Upload	Not Attempted			
AMarquez	Alex	Test Agency 1	Houston Office	Learner Assignment Upload	Not Attempted			
AMarquez	Alex	Test Agency 2	Houston Office	Learner Assignment Upload	Not Attempted			
bfalb	Bruce	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
bfleming	Brad	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
cblessing	Chuck	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
RLJPeterson	Robert	All Members	Houston Office	Learner Assignment Upload	In Progress		2018.06.0	5 New Office Building.jp
rpape	Ron	All Members	Houston Office	Learner Assignment Upload	Not Attempted			•
rpape	Ron	RB	Houston Office	Learner Assignment Upload	Not Attempted			
RRobinettJohnson	Robyn	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
RRobinettJohnson	Robyn	RB	Houston Office	Learner Assignment Upload	Not Attempted			
rsaunders	Randy	All Members	Houston Office	Learner Assignment Upload	Not Attempted			

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</u> <u>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:

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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: *	ORL (A Link To An External Resource)			
	◎Page (A Page On Your Site)			
Location: (Enter The Address Of The	http://			
Link)				

Page: This is any site page within your local portal showing pertinent resources or class information. Includes site skin and menu navigation.

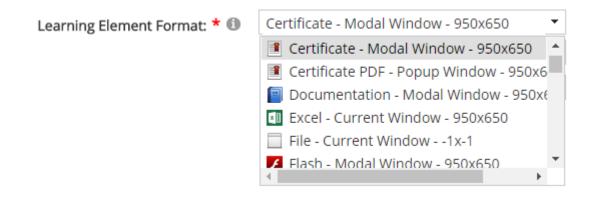
- Select the radio button next to Page. Wait for the page to refresh.
- Select a Web page from your site from the list.

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 <u>Learning Element Formats</u> under the **Configuration** chapter for more information).



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

Advanced Settings

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:

 \sim

- "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.

Advanced Settings	× .
Learning Element Type: 🕚	Link
Utilization Tracking: 🛽	"Complete" on Close
	Include "Pass" upon "Complete"
Expected Duration: 0	
LEID: 0	5be8bed5-61b8-4385-8cde-991394a539f9
Local ID: 🕚	208
Reference: 🕚	
Status: 🕚	●Active ◎Inactive
Views: 🕕	0
Publish Date: 🕚	29 Nov 2016
Unpublish Date: 🕚	
Tags (separated by commas): 🕚	
Utilized in Folders: 0	First Aid Certification > Primary Assessment > Intro to First Aid Assessment
Direct LE Access: 0	Directly Launch LE
	Open Folder & Launch LE
History:	Created: Rick Bruce on 29 November 2016 at 10:40:16 PM
	Updated: IZM Admin on 18 December 2019 at 1:45:39 PM

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.

Accumulate Duration:	0	
recumulate Duration.	-	

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.

Expected Duration: 🕕	Hours	Minutes	Seconds
----------------------	-------	---------	---------

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.

Version History: 🕕

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.

8 8	cco		٨S					🗗 Mary Jones	P Logout
Home	My Courses	Electives	Resources	Transcripts	Community	ELearning Store	LMS Admin	UI Patterns	
									0
Catalog	Roles	Teams A	ctions Con	figuration			Active Team:	All Members	•
Catalog	1								
		Training		elete					0
	Catalog		LE Details LE Conditio LE Complet LE Notificat Launch LE Learner List	ion Events ions					

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

Drag a column head	er and drop it here to grou	p by that column		
Username	Enrollment Type	Folder Title	Rolename	Team
± T	T	T	T	T
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

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.

Pccord LMS				🗷 0 ⁸ Mary Jones	🍄 Logout
Home My Courses Catalog Reso	urces Transcripts	Community	ELearning Store	LMS Admin UI Patterns	
Catalog Roles Teams Actions	Configuration			Active Team: All Members	•
Catalog Copy To • Move To • Ren	nove / Delete				0
 My Catalog Orphans First Aid Certification M Primary Assessment Intro to First Aid Assessment 					
 Primary Assessment / First Aid Assessment - Quiz 	LE Details LE Conditions & Limits LE Completion Events LE Notifications Launch LE Learner List				

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

A 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.

Pccord LMS				🕿 🗗 Mary Jones	← Logout
Home My Courses Catalog Res	ources Transcripts	Community	ELearning Store	LMS Admin UI Patterns	
Catalog Roles Teams Actions	Configuration			Active Team: All Members	•
Catalog Copy To Move To Ref	nove / Delete				0
 My Catalog Orphans First Aid Certification M Primary Assessment Intro to First Aid Assessment 					
 Primary Assessment / First Aid Assessment - Quiz 	LE Details LE Conditions & Limits LE Completion Events LE Notifications Launch LE				
	Learner List				

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

LE Details
 Survey Create surveys or questionnaires with an integrated question builder. General Settings
Name: * 🕕 Course Completion survey
Learning Element Format: * 🕕 Survey - Modal Window - 950x650
Custom Window Dimensions: 🕕 🛛
Enable Proctoring: 🕕 📃
Description: 🕕
Design HTML

- 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.

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.

8 9	ccord	MS				210	Mary Jones 🧳	P Logout
Home	My Courses Catalog	Resources	Transcripts	Community	ELearning Store	LMS Admin	UI Patterns	
Catalog	Roles Teams	Actions Config	uration			Active Team:	All Members	•
Catalog Copy To -	• Move To • Rem	ove / Delete						0
	LMS - Definition of Term Learner Support Group Learner Experience Community Features LMS Learner Quiz							
	CMS Learner Quiz Accord Learner Training W Assignment Upload Complementary study mat LMS Admin Training New Employee Orientation							

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

Pccord LMS	🗷 🖣 Mary Jones 🍄 Logout
Home My Courses Catalog Resources Transcripts Community ELearning Store	LMS Admin UI Patterns
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog Copy To Move To Remove / Delete Move To Move T	0
🗌 🖥 Community Features 🍋	
 / LMS Learner Quiz Accord Learner Training Workshop 	
Assignment Upload	
🗆 🔲 Complementary study material 💃	
LMS Admin Training	
New Employee Orientation	

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.

A 🗆 🗁 My Catalog
🔺 🗆 🛅 LMS Learner Training
🗌 🕦 LMS - Definition of Term 🛛 🎇
🗆 🎿 Learner Support Group 🧏
🗌 🖥 Community Features 🍋
🗌 🥖 LMS Learner Quiz 🍋
🕨 🗌 👤 Accord Learner Training Workshop
🗌 🛧 Assignment Upload
🗆 🔲 Complementary study material 💥
🕨 🗀 LMS Admin Training
A 🗌 🚞 New Employee Orientation
🗌 💿 LMS Overview
GO2 Assessment
Fire Safety
🗆 🗟 Learner Experience

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.

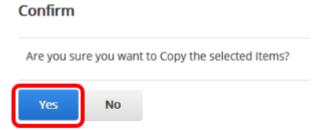
Pccord LMS	🕿 i 🧬 Mary Jones 🍄 Logout
Home My Courses Catalog Resources Transcripts Community ELearning Store	LMS Admin UI Patterns
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog Copy To Move To Remove / Delete My Catalog	0
LONS - Definition of Term Y UMS - Definition of Term Y Learner Support Group Y E Community Features ✓ LMS Learner Quiz	
Accord Course Training Workshop Assignment Upload Gomplementary study material	
CHAS Admin Training Chaster Constraints Chaster Constrai	
🗌 🖥 Learner Experience	

- Click the **Copy To** Button.Select a destination folder from the menu.

Pccord LMS	🛛 🧬 Mary Jones 🍄 Logout
Home My Courses Catalog Resources Transcripts Community ELearning Store	LMS Admin UI Patterns
Catalog Roles Teams Actions Configuration	Active Team: All Members •
Catalog	
Copy To Move To Remove / Delete Copy To Imp Catalog Imp Catalog LMS Learner Training LMS Admin Training Training New Employee Orient Term Net	0
Community Features	
✓ / LMS Learner Quiz 🍋	
Cord Learner Training Workshop	
🗌 👚 Assignment Upload	
🗆 🔟 Complementary study material 📡	
LMS Admin Training	
Dev Employee Orientation	
O LMS Overview	
GO2 Assessment	
Fire Safety Earner Experience	

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.

	IS				⊠ 0 ⁸	Mary Jones 🍯	P Logout
Home My Courses Catalog	Resources	Transcripts	Community	ELearning Store	LMS Admin	UI Patterns	
Catalog Roles Teams Ac	tions Confi	guration			Active Team: All	Members	•
Catalog							
Copy To • Move To • Remov	e / Delete						0
 My Catalog LMS Learner Training IMS - Definition of Term 							
🗆 🛃 Learner Support Group 💥 🗆 🖥 Community Features 🍋 🗆 🖉 LMS Learner Quiz 隆							
Carrier Training Work Accord Learner Training Work Assignment Upload							
Gomplementary study materi Gmplementary study materi GmLMS Admin Training DNew Employee Orientation	al 🎉						
G LMS Overview C CQ2 Assessment G Fire Safety							
B Learner Experience With the survey of the surve	ר						
🗌 🛓 Learner Support Group 💥	J						

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.

Catalog	Roles	Teams	Actions	Configuration	
Catalog					
▶ □ 🗐 h ▲ □ 🗀 A	Catalog Orphans idden .ccord LMS	Move To ▼ Example C nin Training	ourses	ove / Delete	
	🛚 🤽 LMS A	dmin Suppo	ort Group 🔰		
6	🖥 Catalo	g Overview	LED	etails onditions & Limits	
				ompletion Events otifications	
			Laur	nch LE	
			Lear	ner List	

The **LE Conditions** window opens:

LE Conditions

Catalog Overview Prerequisites		~
This Learning Element has no Prerequis	ites	
Add New Prerequisite		
Catalog Overview Attempt Limit		~
Attempt Limit: 🔍	All	
Allow Reset: 📵	Never •	
Reset Delay: 🖲	Hours	
Update Cancel		

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	0
Learning Elements	\sim
 My Catalog Image: Image in the image in the	

- 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**.

LE Conditions

Catalog Overview Prerequisites	~
Type Name	Status
🗙 🗏 CEU Test Course 1	
Add New Prerequisite	
Catalog Overview Attempt Limit	\checkmark
Attempt Limit: 1	•
Allow Reset: Never	
Reset Delay: Hours	•
Update Cancel	

Repeat the above steps to add all the Prerequisites needed.

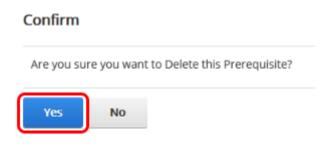
• To remove a Learning Element from the list, click on the red **X** next to the Learning Element you wish to remove.

LE Conditions

Туре	Name	Status
=	CEU Test Course 1	

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.

Catalog Overview Prerequisites	\sim
This Learning Element has no Prerequisites	
Add New Prerequisite	

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.

Attempt Limit: All Allow Reset: Never Reset Delay: Hours	Catalog Overview Attempt Limit	\sim

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

Cancel

Update

LE Conditions

Catalog Overview Prerequisites	\checkmark
This Learning Element has no Prerequisites	
Add New Prerequisite	
Catalog Overview Attempt Limit	~
Attempt Limit: All	
Allow Reset: Never	
Reset Delay: 1 Hours -	
Update Cancel	

Completion Events

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

Catalog	Roles	Teams	Actions	Configuration
Catalog				
Сору То	•	Move To 🔻	Remo	ove / Delete
4 0 C A	Orphans idden ccord LMS LMS Adm	Example Co nin Training		0
		g Overview	LE D LE C LE C LE N Laur	etails onditions & Limits fompletion Events lotifications hch LE mer List

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

Criteria				~
	Completion Requirements: 0	Completed	~	
Role Awards				~
HTTP Requests				~
Update Cancel				

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

Cor	mpletion Requirements: 🕕	Completed	~	
		Completed		
Role Awards		Passed Completed and Passed		
		Completed or Passed		
HTTP Requests				

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.

Accord LMS

Update

Cancel

Criteria			
Co	mpletion Requirements: 🕚	Completed	v
Role Awards			
	Role Group: () Role: ()		✓✓
There are no Role Award	is		
HTTP Requests			

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

Criteria		^
Completion Requirements: 🛈	Completed	
Role Awards		^
Role Group: 🗊 Role: 🗊	Global Roles Fire Safety Annual Add New Role	
There are no Role Awards		
HTTP Requests		~
Update Cancel		

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).

Criteria		
Completion Requirements: 1	Completed v	
Role Awards		
Role Group: 1 Role: 1	Global Roles ~ Fire Safety Annual ~ Add New Role	
Portal > Role Group > Role		Role Award Option
X Accord LMS Documentation Portal [0] > Global Ro	es > Fire Safety Annual	Create or Update Create
HTTP Requests		Create or Update Create or Add Expire Delete

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.

Criteria		
Completion Requirements: ()	Completed ~	
Role Awards		
Role Group: 🗐 Role: 🕲	Global Roles ~ Expirable Role ~ Add New Role	
Portal > Role Group > Role		Role Award Option
Accord LMS Documentation Portal [0] > Global Ro	les > Expirable Role	Create or Update 🗸
X Accord LMS Documentation Portal [0] > Global Ro	les > Fire Safety Annual	Create or Update 🗸
HTTP Requests		
Update Cancel		

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

• Click **Yes**.

Confirm

Are you sure you want to Delete this Role Award?



• Http Requests: Click Add New Request button.

Criteria		^
Completion Requirements: 1	Completed v	
Role Awards		^
Role Group: 🛈 Role: 🕲	Global Roles Fire Safety Annual Add New Role	
Portal > Role Group > Role		Role Award Option
X Accord LMS Documentation Portal [0] > Global Ro	les > Fire Safety Annual	Create or Update 🗸
HTTP Requests		~
	Add New Request	
There are no HTTP Requests		
Update Cancel		

Complete the Http Request Details.

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

	Name: *	Post User Score	
	Description:		
		н	
	Method: *	Post	
	Tokens:	< Select a Token >	
	URL: *	https://www.easyso.org/services/web/service.asc/user/[USERNAME] /[FOLDERID]/success/[SCALEDSCORE]	
	Body:	h.	
Headers			

The newly created Request will be listed.

Criteria				
	Completion Requirements: 🕦	Completed	~	
Role Awards				
Http Requests				
		Add New Request		
Name				Http Request
Post User Score	e			https://www.easyso.org /services/web/service.asc /user/[USERNAME] /[FOLDERID]/success /[SCALEDSCORE]
Update	ncel			

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

Criteria					^
	Completion Requirements: 🚯	Completed	~		
Role Awards					~
Http Requests					^
		Add New Request			
Name				Http Request	
Post User Score	re			https://www.easyso.org /services/web/service.asc /user/[USERNAME] /[FOLDERID]/success /[SCALEDSCORE]	
Update Ca	incel				

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.

Catalog	Roles	Teams	Actions	Configuration	
Catalog					
Сору То	•	Vove To ▼	Remo	ove / Delete	
▶ □ 🖻 h 4 □ 🗀 A	Orphans idden ccord LMS	Example Co	ourses		
			ort Group 🖇	6	
	E Catalo	g Overview	LE C LE C LE N Laur	etails onditions & Limits ompletion Events lotifications nch LE ner List	

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

LMS Lear	rner Quiz I	Notifications				^
		Utilize Global Settings: 🛈	V			
Update	Cancel					

• **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.

LMS Lear	ner Quiz Notifi	cations			~	•
	Util	ize Global Settings: 🕕				
Update	Cancel					

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

Accord LMS

- 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.

LMS Learner Quiz Notifications	^
Utilize Global Settings: 🛈	
Notify: 🗊	OLearners OLMS Admin
Session Registration: 🕕	
LE Attempts: ①	None
Conditions Satisfied: 1	
Learner Comments: 🕕	
Update Cancel	

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

LMS Learner Quiz Notifications	^
Utilize Global Settings: 🗐	
Notify: 🗊	OLearners OLMS Admin
Session Registration: (1)	
LE Attempts: 🕕	Complete 🗸
Conditions Satisfied: (1)	
Learner Comments: 🕕	
Update Cancel	

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.

Paccord LMS

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.

Catalog	Roles	Teams	Actions	Configuration	
Catalog					
▶ □ 🖹 h 4 □ 🗁 A 4 □ 🗎	Catalog Drphans idden ccord LMS J LMS Adm	Move To • Example Co nin Training dmin Suppo	ourses	ove / Delete	
	E Catalo	og Overview	LE C LE C LE N Laur	etails onditions & Limits ompletion Events lotifications nch LE mer List	

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

Drag a column head	er and drop it here to grou	p by that column		
Username	Enrollment Type	Folder Title	Rolename	Team
E T	T	T	T	T
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

Return

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 <u>Reports Module</u> chapter in this guide.

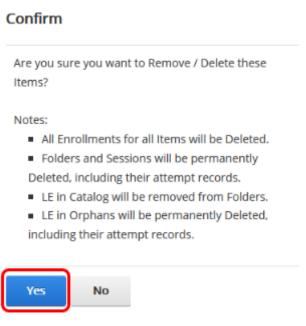
To remove Learning Elements using the Remove/Delete option:

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

Paccord LMS	🛛 🕑 Mary Jones 🍄 Logout
Home My Courses Catalog Resources Transcripts Community ELearning Store	LMS Admin UI Patterns
Catalog Roles Teams Actions Configuration	Active Team: All Members 🔹
Catalog Copy To • Move To • Remove / Delete	0
My Catalog	
C LMS Learner Training	
C CMS Admin Training Compared Admin Training Compared Admin Training	
□ / EGO2 Assessment 🍋	
▶ □ □ Fire Safety	
🖂 🖥 Learner Experience	
🗹 🕦 LMS - Definition of Term 🛛 💥	
🖾 🎿 Learner Support Group 🎉	
🗆 🥒 LMS Learner Quiz 陀	

A confirmation dialog box will show:

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



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

(1) 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.

Pccord LMS	🕿 🗗 Mary Jones 🍄 Logout
Home My Courses Catalog Resources Transcripts Community ELearning Store	LMS Admin UI Patterns
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog Copy To Move To Remove / Delete Move To Copy T	0
Elearner Experience	
LMS Learner Training G LMS - Definition of Term X	
Community Features	
🗆 🧟 Learner Support Group	
🗌 🥖 LMS Learner Quiz 🍋	
Classifier Control	
🗌 👚 Assignment Upload	
🗌 🗐 Complementary study material	
LMS Admin Training	
🕨 🗌 🛅 New Employee Orientation	

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.

E Details		
	Enable Proctoring: 🕚 📃	
	Description: 🕚	
	Image: Second secon	
Advanced	Design HTML	>
Education	Activities	>
Update	Delete Remove From Folder Cancel	

At the confirmation dialog box:

Click Yes

Confirm

Are you sure you want to Delete this Learning Element? This will also permanently delete all associated Learner attempt records for the LE with no option to recover.

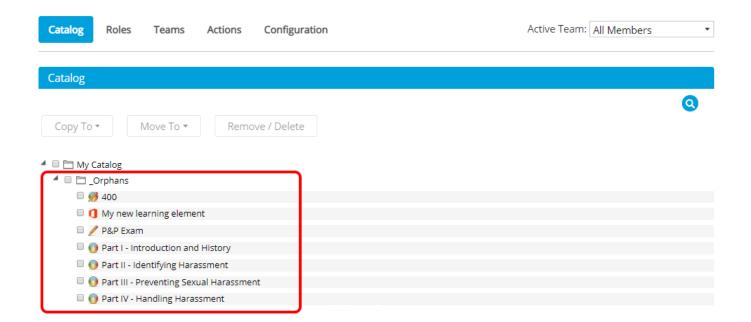


Orphan Learning Elements

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.

Accord LMS

- 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.

Pccord LMS	🛛 🗗 Mary Jones 🍄 Logout
Home My Courses Catalog Resources Transcripts Community ELearning Store	LMS Admin UI Patterns
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog	
Copy To 👻 Move To 👻 Remove / Delete	0
My Catalog	
 ✓ Ø 400 	
🗹 🚺 My new learning element	
🗆 🥖 P&P Exam	
Part I - Introduction and History	

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	Q
Delete All Orphan LE	
1 My new learning element	
🗆 🥖 P&P Exam	
🗆 💽 Part I - Introduction and History	
🗆 💽 Part II - Identifying Harassment	
Part III - Preventing Sexual Harassment	

Certificate of Completion

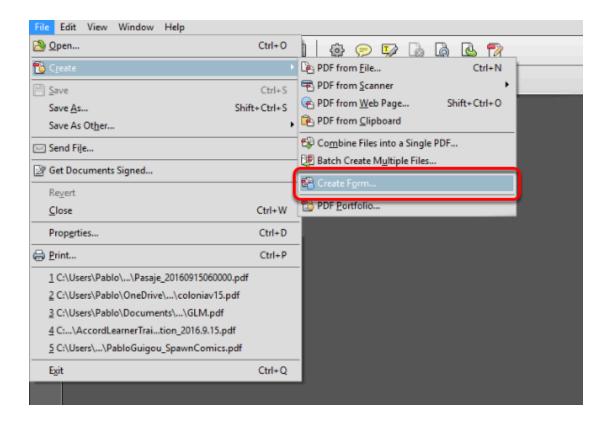
Create a Certificate of Completion

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.

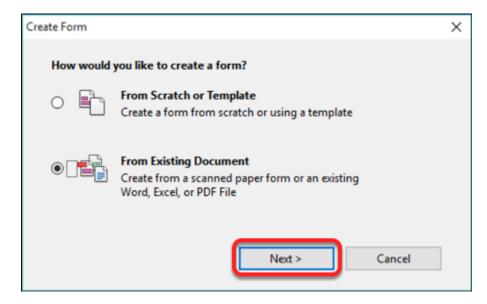
Create a new form file using the **Create Form** option.

• File menu > Create > Create Form.



In the next window,

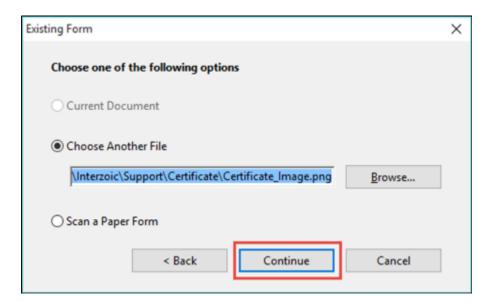
- Select the From Existing Document option;
- Click Next.



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.

Existing Form	×
Choose one of the following options	
O Current Document	
Choose Another File	
\Interzoic\Support\Certificate\Certificate_Image.png	
○ Scan a Paper Form	
< Back Continue Cancel	

• 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.

Advanced Settings	
Learning Element Type: 📵	Certificate 🔹
Utilization Tracking: 🕕	"Complete" on Open 👻
Reference F· fl	< Available Reference LE >
Available Tokens: 🕕	View
Expected Duration:	

To place the form fields:

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

Forms Close Form Editin	g
▼ Tasks	
Add New Field	•
Edit Fields	*
🔁 Distribute	
💼 Other Tasks	*
EchoSign	
Convert to EchoSign Form	

• Select Text Field.

▼ Tasks
Add New Field
TI Iext Field
✓ Chec <u>k</u> Box
log Radio Button
≡≑ List Box
Dropdown
<u>ок</u>) B <u>u</u> tton
<u>x</u> <u>D</u> igital Signature

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



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

General	Appearance	e Position	Options	Actions	Format	Validate	Calculate	
	Name:	Text1						
	Tooltip:							
	nmon Prope							
	nmon Prope orm Field:	Visible		~]Read On	ly	

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

• Close the dialog box.

Text	t Field Prop	perties						
	General	Appearance	Position	Options	Actions	Format	Validate	Calculate
		Name:	Learner:Full	Name]				
		Tooltip:						
	Con	nmon Proper	ties					
	F	orm Field:	Visible		~		Read On	ly
	0	rientation:	0 ~	degrees			Required	I
	Locked							Close

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

Certificate of Achievement		
Paccord LMS	President & CEO Fresident & CEO FE Sparth Instructor, Training and Cartification	

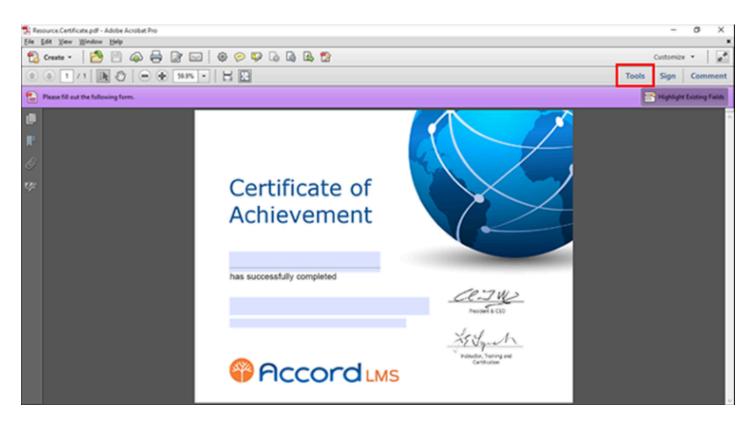
Cleaning the Certificate of Completion

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.

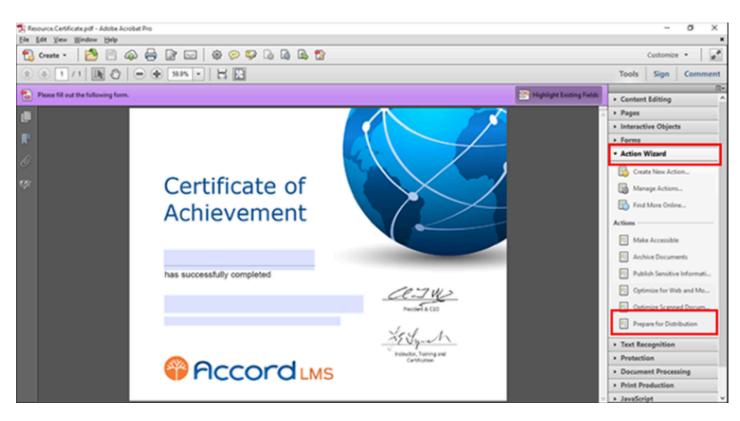
Open the **PDF Certificate** using the PDF editor of your choice. Please note that Adobe Acrobat Pro was used for this tutorial so images and procedures may vary from your actual software.

🚣 Adobe Acrobat	Pro		
File Edit View	Window	Help	
🖄 <u>O</u> pen			Ctrl+0
ち C <u>r</u> eate			•
🖹 Save			Ctrl+S
Save <u>A</u> s			Shift+Ctrl+S
Save As Ot <u>h</u> er	•		•
🖂 Send Fi <u>l</u> e			
📓 Get Document	s Signed		
Re <u>v</u> ert			
<u>C</u> lose			Ctrl+W
Prop <u>e</u> rties			Ctrl+D
🖶 <u>P</u> rint			Ctrl+P
<u>1</u> C:\Users\\B	roken_PDF	Radiology-old.	pdf
2 C:\Users\Pab	lo\\Resou	rce.Certificate.	pdf
<u>3</u> C:\Users\Pab	3 C:\Users\Pablo\\Resource.Certificate.pdf		
4 C:\\Accord	LMS Certifi	cate creation.p	df
5 C:\Users\Pab	lo\Docume	nts\\Untitled.	pdf
E <u>x</u> it			Ctrl+Q

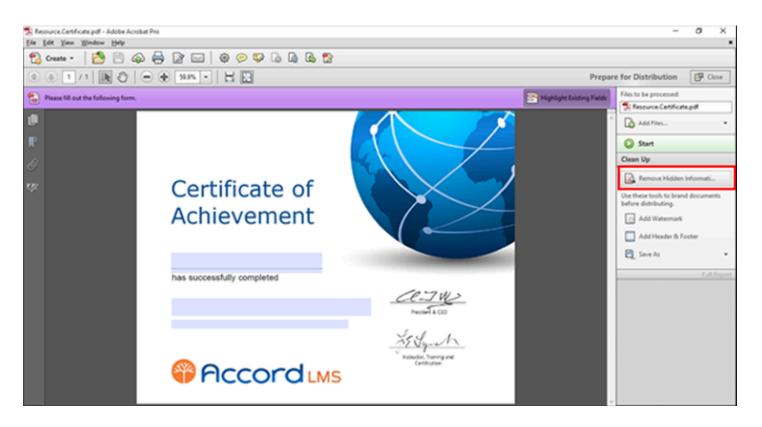
• Open the **Tools** menu.



• 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**.

Remove Hidden Information	Х
Remove Hidden Information will search for and remove the following document information. When you remove any of these items, you also remove digital signatures, Adobe Reader extensions, review and forms workflows and document information added by third-party applications.	i.
 ✓ Metadata ✓ File attachments ☐ Bookmarks ✓ Embedded search index ✓ Comments and markups ☐ Form fields ✓ Hidden text ✓ Hidden text ✓ Hidden layers ✓ Deleted or cropped content ✓ Links, actions and javascripts ✓ Overlapping Objects 	
Help OK Cancel]

- 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**.

Pcco	rdlms				⊠∣0	8 Mary Jones) Logout
Home My Courses	Catalog Resources	Transcripts	Community	ELearning Store	LMS Admin	UI Patterns	
Catalog Roles	Teams Actions Co	nfiguration			Active Team: A	l Members	•
Catalog							Q
Copy To * M	ove To 👻 Remove / [Delete					•
▶ □ 全 First Aid Certifi ▶ □ 户 Product Traini							

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

New Learning Element

c 1 -		
Selec	t a Learning Element Type	>
0	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.	
V	Survey Create surveys or questionnaires with an integrated question builder.	
1	Instructor Led Training Track Classroom or Webinar based Instructor Led Training.	
	Certificate Upload or Select PDF based Certificates of Completion.	
i	Rich Text Add Rich Text web content including images and embedded videos.	
1	Microsoft Asset Upload or Select Microsoft Word, Excel or PowerPoint.	
G	Google Asset Link to Google Doc, Sheet, Slides or Form.	
	File Upload or Select images, videos, zip files and other file based assets.	
1	Assignment Upload Upload assignments, certificates, documents, images or other digital assets.	
	Link Link to any web based asset such as Wikipedia or Khan Academy.	
st	Module Present access to onsite modules.	
Car	ncel	

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

eneral Setti	ngs	
	Name: * () Certificate of Completion	
	Description: Basic Text Box Rich Text Editor	
	E ≙ Ξ E E II II II = +a +A A ✓ ✓ Normal	
	Custom Links	
	Design HTML Preview Words: 0 Characters: 0	
	¤ ☆ ×	
	Drag and Drop a File or Select an Option	
dvanced Set	tings	

• Click on Upload a File.

eneral Settir	gs	^
	Name: * 🕕 Certificate of Completion	
	Description: 🗊	
	Basic Text Box In Rich Text Editor	
	≣ ≘ Ξ Ξ Ξ + +∃ !Ξ !Ξ = +a +Λ ▲ • ∠ • Normal	
	Custom Links	
	Design HTML Preview Words: 0 Characters: 0	
	Design Firms Freedew Words & Characters &	
	ö: 🔝 🗙	
	Upload à File	
dvanced Set	lings	~

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

w Learning Element			
Design	HTML Preview	Words: 0 Characters	: 0
		rse Certificate_English.pdf oading	
Advanced Settings			v
Education Activities			~

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.

Advanced Settings			^
LE Type: ① Learning Element Format: * ① Utilization Tracking: ①	Certificate Certificate - Modal Window - 950x650 None	•	
Reference LE: ① Available Tokens: ① Custom Window Dimensions: ① Expected Duration: ①	< Available Reference LE > Learner Experience Learner Support Group LMS Learner Quiz Accord Learner Training Workshop Assignment Upload		
LEID: 1	۲	•	
Local ID: 🕚	n/a		
Reference: 🕕			
Status: 🛈 Views: 🕚	●Active ◎Inactive		

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.

Advanced Settings

LE Type: 🛈	Certificate Certificate - Modal Window - 950x650
Learning Element Format: * 🗊	
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 r
[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 Description
[LE:Duration]	Shows the Learning Element Expected I

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 th
[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 dee
[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 order 2Y6M is valid and equivalent to 6
[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: she
[REF:ScorePercentage]	Referenced Learning Element Score: she
[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 Midn
[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.

Paccord LMS

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 lcor
[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.

Element Source: 🕕	PDF Template
File Location: 1	Root •
File Name: 🕕	Resource.Certificate.pdf
	Upload New File
Reference LE: (1)	LMS Learner Quiz 👻
Available Tokens: 🕕	View
Learning Element Type: * 🕕	< Select a Learning Element Type >
Custom Window Dimensions: 1	< Select a Learning Element Type > ^
Utilization Tracking: 🕕	Audio Modal Window 0E0x6E0
Expected Duration: 🕕	Certificate - Modal Window - 950x650
Version History: 🕕	Certificate PDF - Popup Window - 950x650 Chat - Modal Window - 950x650

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



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.

Update

Home	Calendar	My Courses	Catalog	Resources	Transcripts	Community	
This course	LMS Learn e demonstrates ho LMS - Definition Learner Support Learner Experier Community Feat	Group Ince ures iraining Workshop z	6	_			Resources
							Search for Learning

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; <u>OpenSesame - Configuration</u>

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.

Pccord LMS	■ ● SuperUser Account Logout		
Home My Courses Electives Resources Transcripts Community ELearning Store	LMS Admin UI Patterns		
Catalog Roles Teams Actions Configuration	Active Team: All Members		
Catalog Copy To • Move To • Remove / Delete	٩		
OpenSesame	>		

• Click Load Marketplace.

OpenSesame	\checkmark
Load Marketplace	

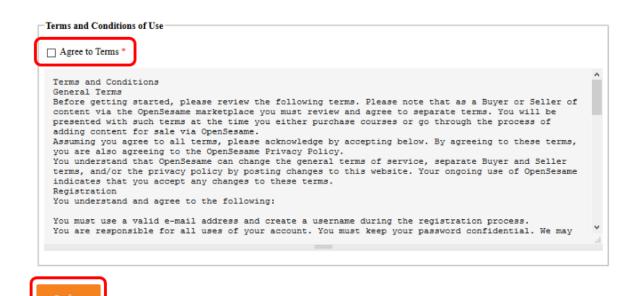
At first launch you will be prompted to **Agree to Terms and Conditions of Use**.

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



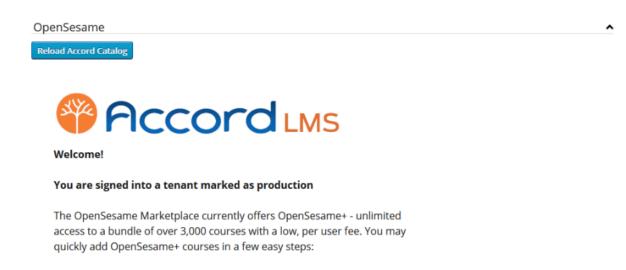
OpenSesame





•

• Click Get Started.

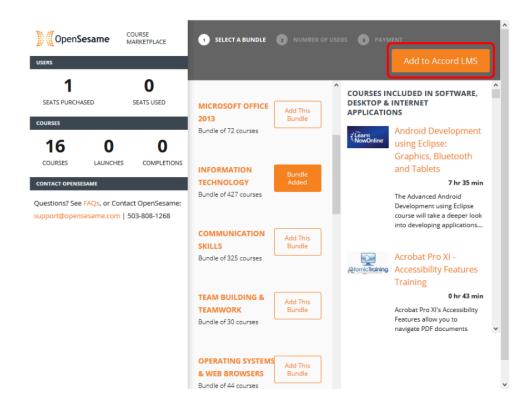


- 1. Browse & select course bundles
- 2. Choose the # of users
- 3. Provide payment information
- 4. Enroll courses in Accord LMS



- Select which Course bundles you want to sync.
- Click Add to Accord LMS.

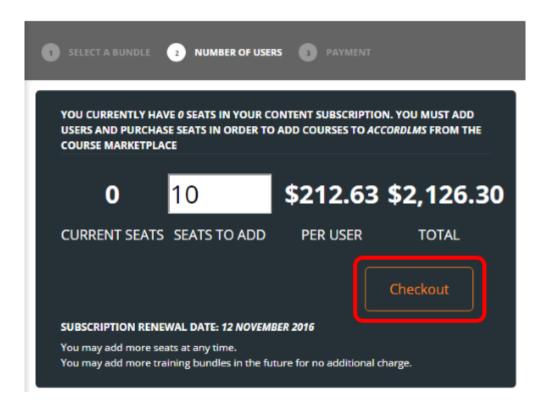
Accord LMS



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.

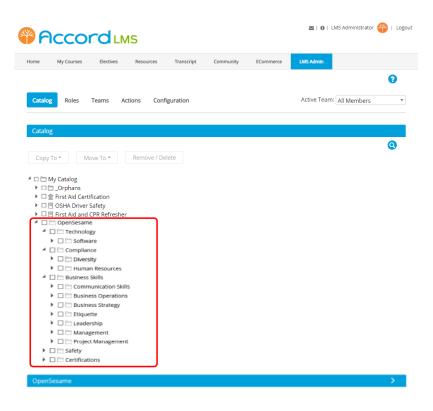
ORDER SUMMARY		
10	\$212.63	\$2,126.30
SEATS TO	PER USER	TOTAL
For subscription renew	wing on 12 November 2016	

- 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: <u>https://www.accordlms.com/blog/5/</u> 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-elementtypes

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.

Accord LMS

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.

Accoro	LMS		⊠ 0 ⁸ Mar	y Jones 平 Log
Home My Courses Cata	log Resources Transcripts	Community ELearnin	ing Store LMS Admin	
				•
Catalog Roles Teams	Actions Configuration		Active Team: All Men	nbers 🔹
Teams				Count
🖌 🎯 All Members	Team Details			
🤽 Learners	Team Content, Role and Portal Access			113
🧭 Content Admin	Team Access Codes			0
🧟 Learner Admin				0
📊 Report Admin	Send Team Message			1
😰 Ricks Test	LMS Admin Types			1
L Team Admin	New Child Team			4

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.

I NEW CHILD TEAM	
Team Details	× .
Team Name: * 🛽	Driver Safety Remote SCO
Include Group: 🛽	
Parent Team: 🛽	All Members
Description:	
Reference:	
Rules	~
Owner: ()	
Automatic Drop: 🕕	
Matching Learners:	С
Rule	*
< Select Field > *	×
Add New Parameter	
Add New Rule	
•	
Remote SCO	v .
Enable Remote SCO: 0	
Remote LMS URL: 0	
Update Return	

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.

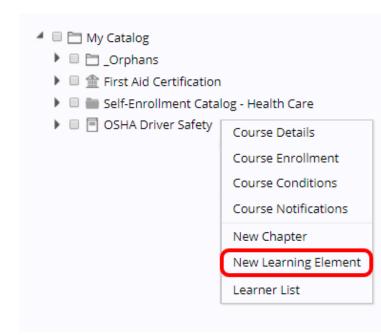
Ensure the larger **Active Team** has been selected by using the adjacent dropdown menu.

Pccord LMS	🛛 🖷 Mary Jones 🍄 Logout
Home My Courses Catalog Resources Transcripts Community ELearning Store	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Copy To • Move To • Remove / Delete	0
 My Catalog Crphans Erst Aid Certification 	***
 Image: Self-Enrollment Catalog - Health Care Image: Image: I	

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.

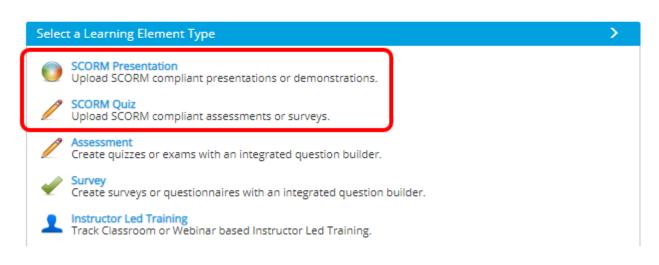
- Click on the learning folder you wish to place Remote SCO content into. This will open it's context menu.
- Click on New Learning Element.



When the New Learning Element window displays;

Click on either SCORM Presentation or SCORM Quiz.

New Learning Element



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.

ieneral Setti	ings	~
	Name: * Distracted Driving	
Learn	ing Element Format: Presentation - Only Completion - Modal Windov *	
Custom V	Vindow Dimensions: 🕘 🛛	
	Enable Proctoring: 🖲 🛛	
	Description: ()	
	Image: Provide the state of the s	
	Design HTML	
	SCO: * () Select	
	- or -	
	1e8b685d-75e8-5e74-f13e-e7	
	Unpack Preloaded SCO ZIP Package	
	Version History: 1	
Advanced Se	ettings	

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**.

Remote SCO		\sim
Team: 🖲	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.

Accord LMS

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**.

Remote SCO		\sim
Team: 🐠	Driver Safety Remote SCO -	
Enabled: 0	•	
Maximum Completions: 0		
Current Completions: 0	0	
In Progress: 0	0	
Expiration: 0		
Last Updated: 🕕		
Update By: 🕕		
Create		

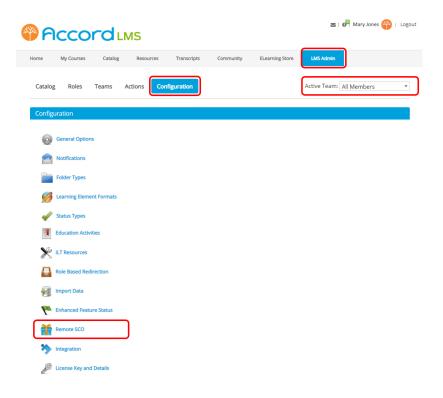
After creating, scroll near bottom and click **Update**.

ucation A	ctivities		
Update	Cancel		

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**.

Remote SCO

	Team Hierarchy						
	Start Date: End Date: 1/13/2020						
Generate Report							
Team	Wrappers	Max. Completions	Curr. Completions	In Progress			
All Members	10	812	5	10			
Driver Safety Remote SCO	1 letails	45	1	0			

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

				R	emote SCO	List				~
		Start Da		/13/2020						
	Generate Report	and drop it here to gro	up by that	soluma						B
	Wrapper Guid	LE Name	Enabled	Maximum Completions	Current Completions	In Progress	Expiration Date	Updated Date	Updated By	Team Path
	T	Ţ								T
%	cecde961-b670- 4392-9684- 238fadbd3dfd	SCO 1 SKY Test	¥	4	2	1		13 Dec 2019	izmadmin	All Members > Gabe test remo SCO
	3d02acc8-b43c- 45a1-8db0- 6c3e426d84de	Distracted Driving		100	0	0	31 Dec 2020	06 Jan 2020	izmadmin	All Members > Gabe test remo SCO
1	▲ 1 ► ► Pa	ge size: 20 🔻								2 items in 1 pa
4										•

Once the edit panel displays;

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

	Enabled: 🕕 🗌				
	Maximum Completions: 100	<u> </u>			
	Current Completions:				
	In Progress: 🕕 0				
	Expiration: 12/2	31/2020			
	Last Updated: 🕕 6 Jar	nuary 2020			
	Update By: 🚯 IZM	Admin			
odate Dov	vnload				
		11-1-1-1-10-1-1	N		
		Update Histor	}		
Enabled	Maximum Completions	Expiration	Updated	Updated By	
Enabled True	Maximum Completions			Updated By IZM Admin	
		Expiration	Updated		

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.

Advanced Settings	>
Remote SCO	>
Education Activities	>
Update Delete Remove From Folder Cancel	

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.

Advanced Settings		>
Remote SCO		\sim
Team: ① < Select a Team >	·	

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

Accord LMS

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.

LE Details

Remote SCO		\sim
Team: 🐠	First Aid 🔹	
Enabled: 🕕	8	
Maximum Completions: 🖲		
Current Completions: 0		
In Progress: 🕕		
Expiration: 🔍		
Last Updated: 💷		
Update By: 🕕		
Create		
Education Activities		>
Update Delete Remove Fro	om Folder Cancel	

YouTube Learning Element

Add a YouTube Video Learning Element

Þ	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**.

Accor				🛛 🛛 LMS Administrator 🍄	Logout
Home My Courses	Electives Resources Transcrip	t Community	ECommerce	LMS Admin	
Catalog Roles Te	ams Actions Configuration			Active Team: All Members	
Catalog Copy To Move Move My Catalog My Catalog Copy To Accord LI Copy To Copy To C	Organizational Folder Details Organizational Folder Enrollment Organizational Folder Conditions			2	

The Learning Element Type page will open.

• Select YouTube Video.

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.	
Voutube video.	
Cancel	

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.

Learning Element	
> Youtube	
ioutube video.	
General Settings	~
Name: * 🕕 🛛	<u>à</u>
Learning Element Format: * 0 Youtube - Modal Window - 1280x720	•
Custom Window Dimensions: 🕚 🛛	
Enable Proctoring: 🕕 🗆	
Description: 🐠	
Image: Image	
Design HTML	
YouTube URL: * 🕕 http://	

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.

Accord LMS

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.

Advanced Settings		~
Learning Element Type: 🕚	Youtube •]
Utilization Tracking: 0	"Complete" on Open	
	Include "Pass" upon "Complete"	
Expected Duration: 0		
LEID: 0	n/a	
Local ID: 🕚	n/a	
Reference: 0		
Status: 0	Active Olnactive	
Views: 🕕	0	
Publish Date: 🕕		
Unpublish Date: 🕚	I	
Tags (separated by commas): 0		
Utilized in Folders: 🕚		

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.

Accord LMS

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

Education Activities	\sim
Award Requirements: 0	Complete or Pass 🔹
Education Units: 🕕	

• **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**.

Pccord LMS	🛛 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
	0
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog	
Copy To 🔻 Move To 👻 Remove / Delete	0
 My Catalog Sample - Accord LMS Content 	
 Sample - LMS Learner Training Welcome to the Accord LMS 	
VouTube - Defensive Driving LE Details LE Conditions & Limits LE Completion Events	
LE Notifications	
Launch LE	
Learner List	

Make desired changes.

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

New Learning Element	
Youtube Voutube video.	
General Settings	\checkmark
Name: * 🕕	
Learning Element Format: * 🕚 Youtube - Modal Window - 1280x720 🔹	
Custom Window Dimensions: 🕕 🗆	
Enable Proctoring: 🔍 🗆	
Description: 0	
•	
Design HTML	
YouTube URL: * () http://	
	_

• **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**.

Pccord LMS	🛛 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
	0
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog	
Copy To 🔻 Move To 👻 Remove / Delete	0
 My Catalog Sample - Accord LMS Content Sample - LMS Learner Training 	
Element to the Accord LMS	
YouTube - Defensive Driving LE Details	
LE Conditions & Limits	
LE Completion Events LE Notifications	
Launch LE	
Learner List	

• 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.

Advanced S	Settings		>
Education	Activities		>
Update	Delete	Remove From Folder Cancel	

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**.

X	P	ccc	ord	LMS					🜌 🕢 LMS Administrator 🍄 Logout
	Home	My Courses	Elective	es Reso	ources	Franscript	Community	ECommerce	LMS Admin
	Catalog	g Roles	Teams	Actions	Configur	ation			Active Team: All Members
	Config	uration							
	Ô	General Optio	ins)					
		Notifications							
		Folder Types							
	Ø	Learning Elem	ent Formats						
	1	Status Types							
		Education Act	ivities						
	×	ILT Resources							
		Role Based Re	direction						
		Import Data							
	P	Enhanced Fea	ture Status						
	*	Integration							
	C	License Key a	nd Details						

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.

-	Search 🗸
Maximum Crawl Depth (ensite): * 3 Maximum Crawl Depth (offsite): * 0 File Types to index: * pdf.doc.docx.dot.rtf.xis.xis.xit.ppt.ppt.txt.htm.html File Type Portal Allas: © documentation.accordIms.com > Search index Path: © DVHTTP/SalexIdocumentation.accordIms.com/VShX4AYAguu3App_DataLMSSearch Index Title: © © Index Tags: © © Index Tags: © © Index Tags: © © Index Store: Compacting of Index- reclaims space from deleted items in the Index Store. Compacting is recommended only when there are many 'Deleted Documents in Index Store: Compacting on receive twice the size of current Index Store during processing. If there are just few items deleted.nothing will change. Re-Indexing- deletes existing content from the Index Store and then re-indexes everything. Notes: • Compacting on Re-Indexing and one peak hours as the process can be CPU Intensive. • Soth Compacting and Re-Indexing are done by the 'Learning Elements Search Crawler scheduled job. Compact Index Rebuild Index > CompactIndex Rebuild I	Minimum Word Length: * 🚺 3
Maximum Crawl Depth (offsite): * o File Types to Index: * off.doc.doc.dot.rtf.xis.xis.xit.ppt.ptx.txt.htm.html File Types to Index: * off.doc.doc.dot.rtf.xis.xis.xit.ppt.ptx.txt.htm.html File Type Portal Allas: documentation accord/ms.com Search Index Path: TV-HTTP/Sales/documentation accord/ms.com/VShX44YAguu3/App_OtataLMSSearch Index Title: Index Description: Index Borg: Index Store: Compacting of Index: reclaims space from deleted items in the Index Store. Compacting is recommended only when there are many 'Deleted Documents' in Index Store: Compacting on reclindexing may require twice the size of current Index Store during processing. If there are just few items deleted. nothing will change. Re-Indexing: deletes existing content from the Index Store and then re-Indexes everything. Notes: - - Compacting on Re-Indexing about be done during non-peak hours as the process can be CPU Intensive. - Both Compacting and Re-Indexing are done by the 'Learning Elements Search Crawler' scheduled job. Compact Index Rebuild Index Compact Index Rebuild Index Plagnostic Trace	Maximum Word Length: * 🕚 255
File Types to index: * pdf.doc.docx.dot.rtf.xis.xis.xit.ppt.ppt.xtxt.htm.html File Type Portal Alias: documentation.accordims.com Search index Path: DitHTTP:Salesidocumentation.accordims.com/VSMX4YAguu3App_DataLLMSSearch Index Tite: Image: Index Top: Image: Index Top: Image: Index Top: Image: Index Top: Image: Index Store: Compacting of Index: reclaims space from deleted items in the index Store Compacting 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 there are just few items deleted, nothing will change. Re-Indexing: deletes existing content from the index Store and then re-indexes everything. Notes: - - Compacting or Re-indexing should be done during non-peak hours as the process can be CPU intensive. - Both Compacting and Re-indexing are done by the 'Learning Elements Search Crawler' scheduled job. Compact Index Rebuild Index Compact Index Rebuild Index Alignostic Trace	Maximum Crawl Depth (onsite): * 🕕 3
File Type Portal Allas: documentation accordims.com/VShX4X4guv3App_DataLMSSearch Index Title: Index Title: Index Title: Index Tags: Index Title: Index Title: Index Store. Compacting of Index- reclaims space from deleted Items in the Index Store Compacting 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 there are just few items deleted. nothing will change. Re-Indexing- celetes existing content from the Index Store and then re-Indexes everything. Notes: - Compacting or Re-Indexing should be done during non-peak hours as the process can be CPU Intensive. - Beth Compacting and Re-Indexing are done by the 'Learning Elements Search Crawler scheduled job. Compact Index Rebuild Index > Compact Inde	Maximum Crawl Depth (offsite): * 🚯 0
Search Index Path: DXHTTPSales\documentation.accordIms.comVShX44YAguu3\App_DataLMSSearch Index Title: Index Tags: Index Body. Index Store. Compacting may require twice the size of current index Store during processing. If there are just few items deleted, nothing will change. Re-Indexing- deletes existing content from the Index Store and then re-Indexes everything. Notes: Compacting or Re-Indexing are done by the Learning Elements Search Crawler scheduled job. Compact Index Rebuild Index R	File Types to index: * 🕼 pdf,doc,docx,dot,rtf,xls,xlsx,xlt,ppt,pptxtxt,htm,html
index Title: index Tags: index Tags: index Body: index Body	File Type Portal Allas: 🕕 documentation accordims.com 🗸
Index Tags: Index Tags: Index Body: Index	Search Index Path: 0 D:\HTTP\Sales\documentation.accordlms.com\X5hX4AYAguu3\App_Data\LMSSearch
Index Body: Compacting of Index-reclaims space from deleted items in the Index Store. Compacting 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 there are just few items deleted, nothing will change. Re-Indexing- deletes existing content from the Index Store and then re-Indexes everything. Notes: - Compacting or Re-Indexing are done by the 'Learning Elements Search Crawler' scheduled job. Compact Index Rebuild Index Are compact Index Rebuild Index	Index Title: 🕕 🗾
Index Body: Cate More Information Compacting of Index-reclaims space from deleted items in the index Store. Compacting 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 there are just few items deleted, nothing will change. Re-Indexing- deletes existing content from the index Store and then re-indexes everything. Notes: Compacting or Re-Indexing are done by the 'Learning Elements Search Crawler' scheduled job. Compact Index Re-build Index	Index Tags: 🕕 🗹
Get More Information Compacting of Index: reclaims space from deleted items in the Index Store. Compacting is recommended only when there are many 'Deleted Documents' in Index Store. Compacting may require twice the size of urrent Index Store during processing. If there are just few items deleted. nothing will change. Re-Indexing: deletes existing content from the Index Store and then re-indexes everything. Notes: - Compacting or Re-Indexing are done during non-peak hours as the process can be CPU Intensive. - Both Compacting and Re-Indexing are done by the 'Learning Elements Search Crawler' scheduled job. Compact Index Rebuild Index Compact Index Rebuild Index Plagnostic Trace >	Index Description: 🕕 🗹
Compacting of Index- reclaims space from deleted items in the Index Store. Compacting 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 there are just few items deleted, nothing will change. Re-Indexing- deletes existing content from the Index Store and then re-indexes everything. Notes: - Compacting or Re-indexing should be done during non-peak hours as the process can be CPU intensive. - Both Compacting and Re-indexing are done by the 'Learning Elements Search Crawler' scheduled job. Compact Index Rebuild Index Plagnostic Trace	Index Body: 🕕 🗌
Index Store. Compacting may require twice the size of current index Store during processing, if there are just few items deleted, nothing will change. Re-Indexing- deletes existing content from the Index Store and then re-indexes everything. Notes: - Compacting or Re-indexing should be done during non-peak hours as the process can be CPU intensive. - Both Compacting and Re-indexing are done by the 'Learning Elements Search Crawler' scheduled job. Compact Index Re-build Index Enrollment Log Diagnostic Trace	Get More Information
Enrollment Log >	Index Store. Compacting may require twice the size of current index Store during processing. If there are just few items deleted, nothing will change. Re-Indexing: deletes existing content from the index Store and then re-indexes everything. Notes: - Compacting or Re-Indexing should be done during non-peak hours as the process can be CPU intensive.
	Diagnostic Trace

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.

P	lccord	LMS				🛛 🕕 LMS Admini	strator 🍄 Logout
Home	My Courses Elect	ves Resources	Transcript	Community	ECommerce	LMS Admin	
Catalog		Actions Cont	figuration			Active Team: All Mem	(? Ibers •
	To 🕶 Move To 🔻	Remove / De	elete				<u>Q</u>

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.

Pccord LMS	🛛 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	ELMS Admin
	•
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog	
Expand All Folders List All Learning Elements	training
My Catalog (2)	
Sample - Accord LMS Content (1)	
Sample - LMS Learner Training (1)	
Accord Learner Training Workshop	
 Accord Plus Courses (1) Compliance (1) 	
Compliance (1) EVENT Anti-Bribery Training (1)	
FCPA Anti-Bribery Training	

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.

train*		Q
--------	--	---

Grading a Learner Uploaded Assignment

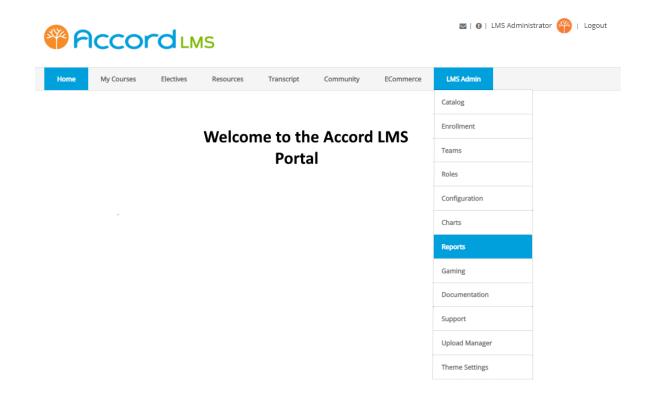
How to Grade an Assignment which has been Uploaded by a Learner

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.

8 8			IS				🛛 🛛 LMS Administrator 🍄 Logout
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin
Reports	s Activity	Configuratio	on				Active Team: All Members
Quick F	Reports						
*	Easy Configur	ration					
	LE Activity with Learner Detai	I	< Defi	ne New Report >	~ C	ontinue	

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.

efinitions		\sim
Select Definition or create a new one from your Filt	er settings. Share your Definition with other Teams. Schedule automatic Delivery.	
Selected Definition: ()	< Create New Definition >	
Name: 🚯	Grading Learner Assignment Upload	
Owner: 🚯		
Description: 🚯		
Team View Permissions: 🕦	All Members Elue Ribbon Home Warranty Boston Office-North	
	🕨 🗹 Engineering Crew	
Version History: 📵		
Create		
ilters		
Learners Content Date	Columns	
Who will be in this Report?		
Select specific learners, members of learning rol	es, or members of teams. Next, select the Learning Content.	
) Users 〇 Roles 🖲 Teams		
All Members		
eport		

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

Learning Elements

~	LE Name		Passing		Expected Duration		Tags
	Last Update Date	~	LE Type		Reference		Folder Path
	LE Version	~	Completion	~	Success	~	Attempt Created Date
	Score Raw		Score Max	~	Score Scaled		Session Time
	Scaled Passing Score		Total Time		Terminate Called		Deleted
	Proctoring Status		Proctoring API Response	~	Comments		Is Best
	Is Last		Is Last Completed		Is First Completed		Archived
	Currently Enrolled		Position		Assignment	~	Assignment Grading

After establishing your desired settings;

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

Definitions		\checkmark
Select Definition or create a new one from your Filte	r settings. Share your Definition with other Teams. Schedule automatic	Delivery.
Selected Definition: 🕕 Name: 🚯	< Create New Definition > Create New Definition >	
Owner: () Description: ()		
Team View Permissions: 🕕	 All Members Blue Ribbon Home Warranty Boston Office-North Engineering Crew 	
Version History: 🕕		
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**.

8 9	ccor		IS				🛛 🕕 LMS Administrator 🍄 Logout
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin
Reports	Configurat	ion					Active Team: All Members
Quick R	Reports						
Ň	Easy Configur	ation					
	LE Activity with Learner Detail		< Sele < Defir	ct Report Definition ct Report Definitior ne New Report >	1>	ntinue	

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.

Accord LMS

- 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.

Assignment Uple	oad - Image Files	✓
Date: Completed:	5/20/2020 3:36 PM	
Success Status:	Passed 🗸	
Score:	80	
Comments:		
		(SAMPLE LEARNER UPLOADED IMAGE)
Update Ca	ncel	

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; <u>Learning</u> <u>Elements</u>.

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.

8 6			IS				🛛 🕕 LMS Administrat	tor ү Logout
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
Catalog	_	Teams Ac	tions Conf	figuration			Active Team: All Member	?
	To • Mc	ove To 🔻	Remove / De	elete				0
	ll First Aid Certific	Folder Detail Folder Enroll Folder Condi Folder Notifi Add Course Add Folder Add Learning	ment tions cations g Path ational Folder					

• Select Instructor Led Training.

Selec	t a Learning Element Type >
0	SCORM Presentation Upload SCORM compliant presentations or demonstrations.
	SCORM Quiz Upload SCORM compliant assessments or surveys.
1	Assessment Create quizzes or exams with an integrated question builder.
\checkmark	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.
Û	Rich Text Add Rich Text web content including images and embedded videos.
1	Microsoft Asset Upload or Select Microsoft Word, Excel or PowerPoint.
G	Google Asset Link to Google Doc, Sheet, Slides or Form.
	File Upload or Select images, videos, zip files and other file based assets.
1	Assignment Upload Upload assignments, certificates, documents, images or other digital assets.
	Link Link to any web based asset such as Wikipedia or Khan Academy.
Þ	Youtube Youtube video.
Ca	ncel

- **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.

New Learning Element	
Instructor Led Training Track Classroom or Webinar based Instructor Led Training.	
General Settings	\sim
Name: * • Learning Element Format: • • Instructor Led Training - Modal Window - 1280x7 • Custom Window Dimensions: • • Description: • Description: • • • • • • • • • • • • • • • • • • • •	
Advanced Settings	>
Education Activities	<u> </u>
Update Cancel	

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.

Advanced Settings		~
Learning Element Type: 0	Instructor Led Training	
LEID: 0	n/a	
Local ID: 🕚	n/a	
Reference: 🕚		
Status: 🕚	Active Olnactive	
Multiple Session Registration: 🕕		
Views: 🕕	0	
Publish Date: 🕚		
Unpublish Date: 🕚		
Tags (separated by commas): 🕚		
Utilized in Folders: 0		
Education Activities		>
Update Cancel		

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; <u>Education</u> <u>Activities</u>

Education Activities		\sim
Award Requirements: 🕕	Complete or Pass	
Education Units: 🕕		
Proper Workplace Conduct: 🕚		



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.

Pccord LMS				🛛 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Reso	urces Transcript	Community	ECommerce	LMS Admin
Catalog Roles Teams Actions	Configuration			Active Team: All Members
Copy To * Move To * Rem				0

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

LE Sessions

Proper Workplace Conduct	\sim
There are no Sessions to list.	
Add New Session	
Return	

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 <u>Resources</u> 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 <u>Resources</u> 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.

General Settings	~
Name: * 0	
Start Date Time: * Ø	06/05/2020 🔠 03:00 PM 👩 🗆 All day
End Date Time: * 0	
	Recurrence
Time Zone: Ø	(UTC-05:00) Eastern Time (US & Can: V
	Use Learner's Timezone
Location: @	<select location=""></select>
Instructor: 0	<select instructor=""></select>
Notifications	
Session Registration (for @ Learners):	U
Session Registration (for @	•
Instructor):	
Advanced Settings	~
Description: 0	
	8 Normal 🗄 🕾 🗏 📰 🖫 📲
i≡ i≡ − ▲ - ∠ ·	O • O · O · O · O · Custom Links O • Custom Links O • O · O · O · O · O · O · O · O ·
Design HTML	
Tags: 0	
Max Learners: 0	
Min Learners: 0	
	▶ ₩ All Members
Calendar Invite: 🛛	
Calendar Invite Body: 🖲	
Available Tokens: @	View
Calendar Reminder 🖲	
Enable Waitlist @	

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.

LE Sessions

Proper Workplace Cond	uct						\sim
Refresh						(4 8 9
Name	Start Date	Location	Instructor	Min	Max	Registered	Waitlisted
E T			1	T		T	T
🦉 🦺 New Hire Session	05 Jun 2020	Corporate Headquarters		1	50	0	0
K ← 1 → H Page Siz	ze: 20 🔻					1 items i	n 1 pages
Refresh							2 3 2

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.

Pccord LMS	🕿 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog Copy To Move To Remove / Delete	0
 My Catalog Sample - Accord LMS Content Sample - LMS Learner Training 	
Welcome to the Accord LMS Accord LMS Learner Experience Accord Learner Training Workshop	
 ✓ LMS Sample Learner Quiz ✓ Course Evaluation Survey ✓ Course to Completion 	
 Proper Workplace Conduct Wew Hire Session - Corporate Headquarters - Fri 5 Jun 2020, 3:00 PM - 4:00 PM EDT Proper Handwashing 	Session Details Session Roster Learner List

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

Session Details

General Settings		\sim
Name: * 0	New Hire Session	
Start Date Time: * 🕕	06/05/2020 🖩 03:00 PM 👸 🗆 All day	
End Date Time: * 0	06/05/2020 III 04:00 PM	
Time Zone: 0	□ Recurrence (UTC-05:00) Eastern Time (US & Cana ✔	
	☑ Use Learner's Timezone	
Location: 0	Corporate Headquarters [max 50]	
Instructor: 0	<select instructor=""></select>	
Notifications		<u> </u>
Advanced Settings		>
Update Delete Copy	Cancel	

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.

Notifications		\checkmark
Session Registration (for 🕚 Learners):		
Session Registration (for 🕕 Instructor):		
Session Update - Send Now (for 🛈 Learners):		
Session Update - Send Now (for 🕕 Instructor):		
Description: 🕚		
Advanced Settings		>
Update Delete Copy	Cancel	

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

Copy Sessions

- Click on the session you want to copy.
 Select Session Details from it's context menu.

Accord	🛛 🛛 LMS Administrator 🍄 Logou
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog	0
Copy To * Move To * Remove / Delete Copy To * Move To * Remove / Delete Multiple Copy To * Cop	
Welcome to the Accord LMS	
Encord LMS Learner Experience Accord Learner Training Workshop	
LMS Sample Learner Quiz	
□ 🖌 Course Evaluation Survey 🍋	
Certificate of Completion 🍋	
Proper Workplace Conduct	
🗆 📆 New Hire Session - Corporate Headquarters - Fri 5 Jun 2020, 3:00 PM - 4:00 PM EDT	Session Details
🗆 👤 Proper Handwashing	Session Roster Learner List

• In **Session Details**, click the **Copy** button.

Session Details

General Settings	>
Notifications	>
Advanced Settings	>
Update Delete Copy Cancel	

The copied session will now display directly under the session it was copied from.

Accord	🛛 🜒 LMS Administrator 🍄 Loj
ome My Courses Electives Resources Transcript Community ECommerce	ELMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog Copy To * Move To * Remove / Delete	0
 My Catalog Sample - Accord LMS Content Sample - LMS Learner Training 	
Belcome to the Accord LMS Belcome to the Accord LMS Belcome Experience	
Coord Laws Learner Training Workshop	
🗆 🥖 LMS Sample Learner Quiz 陀	
🗆 🎻 Course Evaluation Survey 🍋	
🗆 🏽 Certificate of Completion 🎌	
If Certificate of Completion Your Proper Workplace Conduct	

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.

₽ ₽		🛛 0 LMS Administrator 🍄 Logout
Home	My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalo		Active Team: All Members
4 0 🖻	To • Move To • Remove / Delete	0
	🖥 Sample - Accord LMS Content 🛛 🤤	
-	Sample - LMS Learner Training B Welcome to the Accord LMS	
	LMS Sample Learner Quiz 🏷	
	🗆 🖌 Course Evaluation Survey 🌪	
	If Certificate of Completion Y	
	Proper Workplace Conduct	
	🗆 📅 New Hire Session - Corporate Headquarters - Fri 5 Jun 2020, 3:00 PM - 4:00 PM EDT	
	🗹 📆 New Hire Session - Corporate Headquarters - Fri 5 Jun 2020, 3:00 PM - 4:00 PM EDT	
	🗆 💄 Proper Handwashing	

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**.

	🕿 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
	8
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog	
Copy To 👻 Move To 👻 Remove / Delete	0
🖌 🗆 🛅 My Catalog	
1 🔤 Sample - Accord LMS Content 🔤	
G Sample - LMS Learner Training	
Welcome to the Accord LMS	
E Accord LMS Learner Experience I Accord Learner Training Workshop	
LMS Sample Learner Quiz **	
□ ✓ Course Evaluation Survey 🍋	
Certaincate of completion (Proper Workplace Conduct	
🖓 🔤 Hoper Workplace Conduct 1 🛅 New Hire Session - Corporate Headquarters - Fri 5 Jun 2020, 3:00 PM - 4:00 PM EDT	\square
Proper Handwashing	Session Details
	Session Roster
	Learner List

In the details panel, scroll to bottom and click Delete.

Session Details

General Settings	>
Notifications	>
Advanced Settings	>
Update Delete Copy Cancel	

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.

Accordims	🕿 🛛 LMS Administrator 🍄 Log
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog Copy To Move To Remove / Delete	0
 My Catalog Sample - Accord LMS Content Sample - LMS Learner Training 	
Belome to the Accord LMS	
🗆 🖥 Accord LMS Learner Experience	
Classifier Control	
🗆 🥖 LMS Sample Learner Quiz 🔖	
🗆 🖌 Course Evaluation Survey 陀	
🗆 🔳 Certificate of Completion 🎌	
4 🗆 👤 Proper Workplace Conduct	
🗆 🛅 New Hire Session - Corporate Headquarters - Fri 5 Jun 2020, 3:00 PM - 4:00 PM EDT	Session Details
Proper Handwashing	Session Roster

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.

orag a column nead	der and drop it here to	group by that column		
Username	Enrollment Type	Folder Title	Rolename	Team
± T	T	T	Ţ	Ţ
izmadmin	Role Folder Enrollment	Sample - LMS Learner Training	LMS Learner Training	All Members
lmsadmin	Role Folder Enrollment	Sample - LMS Learner Training	LMS Learner Training	All Members
portaladmin	Role Folder Enrollment	Sample - LMS Learner Training	LMS Learner Training	All Members
reguser	Role Folder Enrollment	Sample - LMS Learner Training	LMS Learner Training	All Members
samplelearner	Role Folder Enrollment	Sample - LMS Learner Training	LMS Learner Training	All Members

Learner List

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**.

	🖀 🕢 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog Copy To • Move To • Remove / Delete • • • • • • • • • • • • •	0
 Crphans Hidden 	
Geord LMS Example Courses Discrete LMS Admin Training	
 Image: Second Admin Fraining Image: Second Admin Fraining Image: Second Admin Fraining 	
🖌 🗏 🖻 test ILT	
▲ □ 1 test ilt	
My new session - Fri 13 Sep 2019, 5:00 PM - 6:00 PM MDT	
 Image: Session - Sat 31 Aug 2019, 1: Session Details OT Image: Session Details OF Model Image: Session - Fri 30 Aug Image: Session Details OF Model 	
 Eate August Session - Fri So Aug Session Roster Session 2 - test Corporate Heado Session Roster Session PM - 8:00 PM - 8:00 PM EDI 	r
□ First of August Session - Thu 1 At Learner List 11:59 PM MDT	•
End of July Session - Sat 27 Jul 2019, 12:00 AM - 11:59 PM MDT	

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.

Session Details

General Settings		\sim
Name: * 🕕	My new session	
Start Date Time: * 🕕	09/13/2019 🖩 05:00 PM 🕎 🗏 All day	
End Date Time: * 🕕	09/13/2019 🔳 06:00 PM 👸	
	Recurrence	
Time Zone: 🕚	(UTC-07:00) Mountain Time (US & Ca ▼	
	Use Learner's Timezone	
Location: 0	<select location=""></select>	
Instructor: 🖲	<select instructor=""></select>	
Notifications		>
Advanced Settings		>
Update Delete Copy	Cancel	

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.)

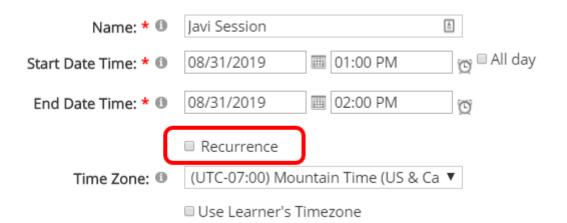
Time Zone: Select the proper time zone for the location of the Session.

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.

Recurrence			
◎Hourly	Recur every 1	🔹 week(s) on	
Oaily	🗆 Sunday	🗆 Monday	🗆 Tuesday
Weekly	🗆 Wednesday		
○Monthly	🗆 Thursday	🗆 Friday	🗷 Saturday
Noarly			
 No end date ○ End by 11/2/ 	© End after 2019 ▼	10 🗘 occurrer	nces

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

otifications	~
Session Registration (for ① Learners):	
Session Registration (for I Instructor):	
Session Update - Send Now (for 🕕 Learners):	
Session Update - Send Now (for ① 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

Description:	
+ • 🕭 • B I 🗉	8 Paragraph Style (⇒ ⇒ ⇒ = (= +3)
i≡ i≡ − A • ∠ •	🖉 • 🖉 • 🖉 ε ² 🖽 • Ω • Custom Links
Design HTML	
Tags: 🖲	
Max Learners: 🕕	
Min Learners: 🕕	
Team Filter: 🗐	▶ 🖉 All Members
Calendar Invite: 🕕	8
Calendar Invite Body: 🕚	
Available Tokens: 0	View
Calendar Reminder 🛽	None 🔻
Enable Waitlist 💷	
	Created: IZM Admin on 30 July 2019 at 2:09:25 PM
Version History: 🕕	

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.

Accord LMS

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.

Pccord LMS	🕿 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
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 * New Employee Orientation (ILT)	0
 First Day Orientation Class Spring 2020 - Wed 20 4 - 2020 Attro0 AM - 12:00 PM MDT 	
Session Details Winter 2020 - Sat 2 Session Roster Learner List	

The **Session Roster** screen displays.

egistered: 10 Max Class: Unlimited Refresh Bulk U mag a column heade	Jpdate Save Dat	ta 🗌 Inc	lude Available lude Clipboard						<u>i</u> m 2 3 2
Username	First Name	Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail	Status Date
T	T	T		AII 🔻 T		All 🔻 🍸	T	All 🔻 🍸	
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
Gjong	candice	de'jong		Registered ~				~	09/13/2016
Ddavidson	david	Davidson	\checkmark	Registered ~				\sim	09/13/2016
Jdavidson	John	Davidson		Registered ~				~	09/13/2016
Jmontero	jose	montero	\checkmark	Registered ~				\sim	09/13/2016
Karbuckle	Kelsey	Arbuckle		Registered ~				~	09/13/2016
Mstarkweather	Mason	Starkweather		Registered ~				~	09/13/2016
∀ 1 ► ₩	Page Size: 20 👻								10 items in 1 pag

Learners registered for this session will displayed in this list along with their **Registered** Status.

egistered: 10 Max Class: Unlimited Refresh Bulk U prag a column heade	Jpdate Save Dat		lude Available (lude Clipboard						<u>i</u> m 🕹 9 9
Username	First Name	Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail	Status Date
Ţ	T	T		All T		AII 🔻 🍸	T	All 🔻 🍸	T
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
Jdavidson	John	Davidson		Registered ~				~	09/13/2016
Jmontero	jose	montero		Registered ~				\sim	09/13/2016
Karbuckle	Kelsey	Arbuckle		Registered ~				~	09/13/2016
Mstarkweather	Mason	Starkweather		Registered $\!$				×	09/13/2016
K K 1 ▶ ▶	Page Size: 20 👻								10 items in 1 page

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.

Registered: 10 Max Class: Unlimited Refresh Bulk U Drag a column heade	Registration: Waitlist: No		lude Available (lude Clipboard						C] 🖂 🛃	¥ 🖪
Username	First Name	Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail	Status	Date	
T	T	T		All 🔻 🝸	AII 👻 🍸	All 🔻 🝸	T	All 👻	T	I	T
Agray	Ashleigh	Gray		Registered ~				~	09/13/	2016 🔳	
Arideout	Alexandra	Rideout		Registered ~				~	09/13/	2016 📖	1
Bdavidson	Bryant	Davidson		Registered ~				~	09/13/	2016	
Cdavidson	cheese	Davidson		Registered				~	09/13/	2016 📖	1
Cjong	candice	de'jong		Not Registered Registered	-			~	09/13/	2016	
Ddavidson	david	Davidson	\checkmark	Completed				~	09/13/	2016 📖	1
Jdavidson	John	Davidson		In Progress Registered				~	09/13/	2016	
Jmontero	jose	montero		Registered ~				~	09/13/	2016 📖]
Karbuckle	Kelsey	Arbuckle		Registered ~				~	09/13/	2016	
Mstarkweather	Mason	Starkweather	\checkmark	Registered ~				~	09/13/	2016 📖	1
	Page Size: 20 👻								10 ite	ems in 1	pag

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.

Registered: 10 Max Class: Unlimited Refresh Bulk U	Registration: Waitlist: No Jpdate Save Dat	ta 🗌 Inc	lude Available (lude Clipboard						i 🖂 🛃 🗒
)rag a column heade	er and drop it here								
Username	First Name	Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail	Status Date
T	T	T		All • T	All 👻 🍸	All 👻 🍸	T	All 👻	T I T
Agray	Ashleigh	Gray		Registered ~				~	09/13/2016
Arideout	Alexandra	Rideout	\checkmark	Registered ~				~	09/13/2016
Bdavidson	Bryant	Davidson		Registered ~				~	09/13/2016
Cdavidson	cheese	Davidson	\checkmark	Registered ~				~	09/13/2016
☑ Cjong	candice	de'jong		Completed ~					09/13/2016
Ddavidson	david	Davidson	\checkmark	Registered ~				Passed	09/13/2016
Jdavidson	John	Davidson		Registered ~				Failed	09/13/2016
Jmontero	jose	montero	\checkmark	Registered ~				\sim	09/13/2016
Karbuckle	Kelsey	Arbuckle		Registered ~				~	09/13/2016
Mstarkweather	Mason	Starkweather		Registered ~				~	09/13/2016
	Page Size: 20 🔻								10 items in 1 page

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.

	Jpdate Save Dat		lude Available (lude Clipboard						1
Drag a column heade Username	r and drop it here	to group by that c	olumn Authorised	Status	Peer	Absent	Score	Pass/Fail	Status Date
	TISCIAL	T					T		
Agray	Ashleigh	Gray	2	Registered ~		-			09/13/2016
Arideout	Alexandra	Rideout		Registered ~				~	09/13/2016
Bdavidson	Bryant	Davidson		Registered ~				~	09/13/2016
Cdavidson	cheese	Davidson	\checkmark	Registered ~				~	09/13/2016
☑ Cjong	candice	de'jong		Completed ~				Passed ~	09/13/2016
Ddavidson	david	Davidson	\checkmark	Registered \sim				~	09/13/2016
Jdavidson	John	Davidson		Registered ~				~	09/13/2016
Jmontero	jose	montero	\checkmark	Registered \sim				\sim	09/13/2016
Karbuckle	Kelsey	Arbuckle		Registered ~				~	09/13/2016
□ Mstarkweather	Mason	Starkweather	\checkmark	Registered ~				~	09/13/2016
	Page Size: 20 🔻								10 items in 1 page

More than one column header may be dragged upwards to group data.

Refresh Bulk Up Status * III UserName Username UserName Status: Registerr UserName: A Agray Agray UserName: A Arideout UserName: B Bdavidson	First Name First Name Ged gray Ashleigh	Last Name	e Available Can e Clipboard Car Authorised	ndidates	Peer	Absent	Score	Pass/Fa	ail T	Katus Date 09/13/2016
Username Status: Registere UserName: A Agray UserName: A Arideout UserName: B Bdavidson	First Name First Name ed gray Ashleigh rideout	Last Name	Authorised	Status					• •	
Status: Registere Status: Registere UserName: A Agray UserName: A Arideout UserName: B Bdavidson	T T ed gray Ashleigh rideout	Gray	AII - T						• •	
 Status: Registered UserName: A Agray UserName: A Arideout UserName: B Bdavidson 	ed gray Ashleigh rideout	Gray					T	All		
 UserName: A Agray UserName: A Arideout VserName: B Bdavidson 	gray Ashleigh rideout			Registered ~					~	09/13/2016
 Agray UserName: A Arideout UserName: B Bdavidson 	Ashleigh		Z	Registered ~	-				~	09/13/2016
 UserName: A Arideout UserName: B Bdavidson 	rideout			Registered ~					\sim	09/13/2016
 Arideout UserName: B Bdavidson 										
✓ UserName: B□ Bdavidson	Alexandra									
Bdavidson	a second second second	Rideout	\checkmark	Registered ~					\sim	09/13/2016
	davidson									
	Bryant	Davidson		Registered ~					~	09/13/2016
 UserName: C 	davidson									
Cdavidson	cheese	Davidson		Registered ~					~	09/13/2016
UserName: C	long									
Cjong	candice	de'jong		Registered ~					~	09/13/2016
 UserName: D 	davidson									
Ddavidson	david	Davidson		Registered ~					~	09/13/2016
 UserName: Jo 	davidson									

Once completing any desired changes;

• Click Save Data

		Registration: - Vaitlist: No									
Re	Bulk Update	Save Data		Available Cano Clipboard Can						📋 🖂 🕻) 🖉 🗒
Statu	is 🔺 🖾 - UserName 🦂										
	Username	First Name	Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail	Status Date	1
		T	T	All 🔻 🍸	All T	AII 👻 🍸	All 🔻 🍸	T	All 🔻 🍸		
, s	Status: Registered										
~	UserName: Agray	/									
	Agray	Ashleigh	Gray		Registered ~				~	09/13/2016	
~	UserName: Aride	out									
	Arideout	Alexandra	Rideout	\checkmark	Registered ~				\sim	09/13/2016	
~	UserName: Bdavi	idson									
	Bdavidson	Bryant	Davidson		Registered ~				~	09/13/2016	
~	UserName: Cdavi	idson									
	Cdavidson	cheese	Davidson	\checkmark	Registered ~				\sim	09/13/2016	
~	UserName: Cjong	5									
	Cjong	candice	de'jong		Registered ~				~	09/13/2016	
~	UserName: Ddav	idson									
	Ddavidson	david	Davidson	\checkmark	Registered ~				\sim	09/13/2016	
~	UserName: Jdavid	lson									
	Jdavidson	John	Davidson		Registered ~				~	09/13/2016	

A message will display confirming that: **All checked row data has been successfully saved**.

• Click **Ok**.

Message	•
All checke saved.	d row data has been successfully
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.

Max Class: Unlimited Waitlis	ration: - t: No ve Data	☑ Include Availa							<u>i</u> 🖂 🔒 🕱 🗄
Drag a column header and drop i	t here to group by t								
Username	First Name	Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail	Status Date
	T	T	AII 👻 🍸		All 👻 🍸		T	All 👻 🍸	
Agray	Ashleigh	Gray		Registered ~				~	09/13/2016
Arideout	Alexandra	Rideout	\checkmark	Registered \sim				~	09/13/2016
Bdavidson	Bryant	Davidson		Registered ~				~	09/13/2016
Cdavidson	cheese	Davidson		Registered \sim				~	09/13/2016
Cjong	candice	de'jong		Registered ~				~	09/13/2016
Ddavidson	david	Davidson		Registered \sim				~	09/13/2016
izmadmin	IZM	Admin		Available ~				~	03/05/2013
Jdavidson	John	Davidson		Registered \sim				\sim	09/13/2016
Jharris	Joseph	Harris		Available ~				~	03/05/2013
□ Jhartley	Joshua	Hartley		Available ~				\sim	03/05/2013

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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).

Introduction - Raritan Plaza - 12 Se	2016, 12:00 PM - (01:00 PM						
Registered: 10 Registration: - Max Class: Unlimited Waitlist: No								
Refresh Bulk Update Save Data	⊡ Include Availa □ Include Clipb		-					📋 🖂 🛃
Drag a column header and drop it here to gro	oup by that column							
Username First Na	me Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail	Status Date
	T			AII 👻 🝸		T	All 🔻 🍸	
Agray Ashleigh	n Gray		Registered ~				~	09/13/2016
Arideout Alexand	ra 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	\checkmark	Registered ~				~	09/13/2016
izmadmin IZM	Admin		Available ~				~	03/05/2013
Jdavidson John	Davidson	>	Registered ~				~	09/13/2016
Jharris Joseph	Harris		Available 🗸 🗸				~	03/05/2013
□ Jhartley Joshua	Hartley	\checkmark	Available Registered				~	02/05/2013
□ Jmontero jose	montero		Completed In Progress				~	09/13/2016

Click Save Data

Refresh Bulk Update Sav	re Data	☑ Include Availa □ Include Clipbo							📋 🖂 🛃 🖥
Drag a column header and drop it	here to group by t	hat column							
Username	First Name	Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail	Status Date
T	T	T		All •			T	AII 👻 🝸	
Agray	Ashleigh	Gray		Registered ~				~	09/13/2016
Arideout	Alexandra	Rideout		Registered ~				\sim	09/13/2016
Bdavidson	Bryant	Davidson		Registered ~				~	09/13/2016
Cdavidson	cheese	Davidson		Registered ~				\sim	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	\checkmark	Registered \sim				~	09/13/2016
☑ Jharris	Joseph	Harris		In Progress 🗸				~	03/05/2013
Jhartley	Joshua	Hartley	\checkmark	Available ~				×	03/05/2013
Jmontero	jose	montero		Registered ~				~	09/13/2016

^

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.

	Refresh Bulk Update Save		Include Availal		-						1
	g a column header and drop it h Username	ere to group by t	hat column	Authorised	Status	Peer	Absent	Score	Pass/Fail		Status Date
	T	T	T					T		T	
	Agray	Ashleigh	Gray		Registered ~				~		09/13/2016
2	Arideout	Alexandra	Rideout		Registered ~				~		09/13/2016
2	Bdavidson	Bryant	Davidson		Registered ~				~		09/13/2016
	Cdavidson	cheese	Davidson	\checkmark	Registered ~				~		09/13/2016
2	Cjong	candice	de'jong		Registered ~				~		09/13/2016
2	Ddavidson	david	Davidson	\checkmark	Registered ~				~		09/13/2016
	izmadmin	IZM	Admin		Available ~				~		03/05/2013
	Jdavidson	John	Davidson		Registered \sim				~		09/13/2016
2	Jharris	Joseph	Harris		In Progress 🗸				~		03/05/2013
	Jhartley	Joshua	Hartley	~	Available ~				~		03/05/2013

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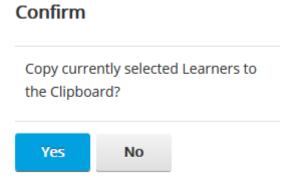
• Click Copy to Clipboard button.

Introduction - Raritan Plaza - 12 Sep 2016, 12:00 PM - 01:00 PM

Refresh Bulk Update Sa	ve Data	Include Availa							
Drag a column header and drop i	t here to group by t	hat column							
Username	First Name	Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail	Status Date
	T	T					T	All 🔻 🝸	
🗹 Agray	Ashleigh	Gray		Registered ~				~	09/13/2016
Arideout	Alexandra	Rideout	\checkmark	Registered ~				~	09/13/2016
Bdavidson	Bryant	Davidson		Registered ~				~	09/13/2016
Cdavidson	cheese	Davidson	\checkmark	Registered ~				\sim	09/13/2016
🗹 Cjong	candice	de'jong		Registered ~				~	09/13/2016
Ddavidson	david	Davidson	\checkmark	Registered ~				\sim	09/13/2016
izmadmin	IZM	Admin		Available ~				~	03/05/2013
Jdavidson	John	Davidson	\checkmark	Registered ~				\sim	09/13/2016
🗹 Jharris	Joseph	Harris		In Progress 🗸				~	03/05/2013
□ Jhartley	Joshua	Hartley	\checkmark	Available ~				~	03/05/2013

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**.

Message	
Currently selected Learners successfully co to the Clipboard.	pied
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.

Registered: 10 Max Class: Unl	0									
Refresh	Bulk Update Save	Data	☑ Include Availa ☑ Include Clipbo	ومناطرتها اعترار اعترار البلاية مناسبة الاتيا						📋 🖂 🕌 🖺
Drag a column	header and drop it h	ere to group by t	hat column							
Username	e	First Name	Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail	Status Date
	T	T	T	AII 👻 T				T	All T	
Agray		Ashleigh	Gray		Registered ~				~	09/13/2016
Arideout		Alexandra	Rideout		Registered ~				\sim	09/13/2016
Bdavidson	ı	Bryant	Davidson		Registered ~				~	09/13/2016
Cdavidson	1	cheese	Davidson		Registered ~				\sim	09/13/2016
Cjong		candice	de'jong		Registered ~				~	09/13/2016
Ddavidsor	ı	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

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- 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.

Refresh Bulk Update Save	Data	Include Availat									. .
Drag a column header and drop it h	nere to group by th	nat column									
Username	First Name	Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail		Status Date	е
	T	T	All 🔻 🍸		AII 🔻 T	AII 🔻 🝸	T	All 🔻	T		
🗹 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@accordIms.com Subject: *	
Include Instructor: Body: *	
$\begin{array}{c c} \hline Booy: & \bullet \\ \hline \hline & \bullet \\ \hline \hline \hline & \bullet \\ \hline \hline & \bullet \\ \hline \hline \hline & \bullet \\ \hline \hline \hline \hline \hline \hline \hline & \bullet \\ \hline \hline$	
<u>چ</u> -	
➢ Design ↔ HTML ♥ Preview .::	
Available Tokens: View	
Send Cancel	

Provide the required information along with the information message to your Learners.

• Click Send



Send Message to Roster	^
Send an Email Message to all selected Learners.	
From: * demo@accordIms.com Subject: * Venue Change	
Include Instructor:	
Body: *	
※ 軸 自 自 · 沙 林 註 三 三 つ · C · 国 間 為 合 serif · 16px · A · の · B / Ц ■ 三 三 三	
sein · lopx · A · O) · B / U =: a a a	
This notice is to inform you that the Introduction session has been relocated. Please check your Plan before attending. Thanks,	
Administration.	
✓ Design ↔ HTML 《 Preview:	
Available Tokens:	
Send Cancel	

A Message will inform you that the notices were successfully sent.

• Click **Ok**

Message	
Notices successfully sent to 4 User(s).	
Ok	

Exporting a Session Roster

You can **export** the Session Roster list in PDF, Excel and RAW data .csv file.

Max Class: Unlimited Waitli Refresh Bulk Update Sa	we Data	☑ Include Availa ☑ Include Clipbo							
Drag a column header and drop	it here to group by t								
Username	First Name	Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail	Status Date
T	T	T	All 👻 🍸		All 👻 🍸		T	All V	
🗹 Agray	Ashleigh	Gray		Registered ~				~	09/13/2016
☑ Arideout	Alexandra	Rideout	\checkmark	Registered ~				~	09/13/2016
Bdavidson	Bryant	Davidson		Registered ~				~	09/13/2016
☑ Cdavidson	cheese	Davidson	\checkmark	Registered ~				\sim	09/13/2016
☑ Cjong	candice	de'jong		Registered ~				~	09/13/2016
☑ Ddavidson	david	Davidson	\checkmark	Registered ~				\sim	09/13/2016
izmadmin	IZM	Admin		Available ~				~	03/05/2013
Jdavidson	John	Davidson	\checkmark	Registered ~				~	09/13/2016
Jharris	Joseph	Harris		Clipboard ~				~	09/15/2016
□ Jhartley	Joshua	Hartley	\checkmark	Available ~				~	03/05/2013

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All the filtering and grouping customization applied will be reflected in the exported file or printed version.

Accord Learner	Training	Workshop >	Introduction	2016.9.15
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Username	First Name	Last Name	Authorised	Status	Peer	Absent	Score	Pass/Fail	Status Da
atus: Available	r in stel valine	Last I value	Huthoriseu	Startus	1 COL	Hostelle	50010	1 a35/1 am	Status Da
UserName: izr	nadmin								
izmadmin	IZM	Admin	True	Available	False	False			03/05/201
UserName: Jh						-			05/05/201
Jhartley	Joshua	Hartley	True	Available	False	False			03/05/201
UserName: Jsl	ort	,							
Jshort	joseph	short	True	Available	False	False			03/05/201
UserName: Im	sadmin								
lmsadmin	LMS	Administrator	True	Available	False	False			05/12/201
UserName: Nr	elson								
Nnelson	Nicolette	Nelson	True	Available	False	False			03/05/201
UserName: Oc	lavidson								
Odavidson	Osvald	Davidson	True	Available	False	False			03/05/201
UserName: pa	blo.guigou@	accordlms.com	1						
o.guigou@accordlm	s.conPablo	Guigou	True	Available	False	False			03/05/201
UserName: pa	blog								
pablog	Pablo	Guigou	True	Available	False	False			03/05/201
UserName: Pd	avidson								
Pdavidson	pato	Davidson	True	Available	False	False			03/05/201
UserName: po	rtaladmin								
portaladmin	Portal	Admin	True	Available	False	False			05/12/201
UserName: reg	user								
reguser	reguser	reguser	True	Available	False	False			03/05/201
UserName: Sd	avidson								
Sdavidson	Serge	Davidson	True	Available	False	False			03/05/201
UserName: tes									
test2	test2	1	True	Available	False	False			03/05/201
UserName: Tr									
Tmurray	Tania	Murray	True	Available	False	False			03/05/201

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.

Pccord LMS	🔤 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog Copy To * Move To * Remove / Delete	0
 My Catalog Orphans First Aid Certification Self-Enrollment Catalog - Health Care OSHA Driver Safety New Employee Orientation (ILT) First Day Orientation Class 	
Spring 2020 - Wed Session Details Winter 2020 - Sat 2 Session Roster Learner List	

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.

Learners				~
Drag a column heade	er and drop it here to group	by that column		
Username	Enrollment Type	Folder Title	Rolename	Team
± 7	T	T	T	T
4329	Role Folder Enrollment	test ILT	Registered Users	All Members
4329	Role Folder Enrollment	test ILT	Ricks test team	All Members
4329	Role Folder Enrollment	test ILT	Ricks test team	All Members > RB
aahmednafea	Role Folder Enrollment	test ILT	Registered Users	All Members
bbish	Role Folder Enrollment	test ILT	Ricks test team	All Members
bbish	Role Folder Enrollment	test ILT	Ricks test team	All Members > RB
I 2 3 4 5	6789 H 20 -			

Return

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

Learners							\sim
Drag a column h	eader and drop it here to ខ្	group	by that column				
Username	Enrollment Type		Folder Title		Rolename	Team	
nelson 🗎	NoFilter			T	T		T
Amarquez	Contains	t	Fire Safety		Open Sesame Plus	All Members	
Amarquez	DoesNotContain StartsWith	t	Fire Safety		Registered Users	All Members	
Arideout	EndsWith	t	Fire Safety		Registered Users	All Members	
ArtieA	EqualTo	t	Fire Safety		Registered Users	All Members	
Bdavidson	NotEqualTo GreaterThan	t	Fire Safety		Registered Users	All Members	
beckym	LessThan	t	Fire Safety		Registered Users	All Members	
beckyw	GreaterThanOrEqualTo	t	Fire Safety		Registered Users	All Members	
beckyy	LessThanOrEqualTo Between	t	Fire Safety		Registered Users	All Members	
beckyz	NotBetween	t	Fire Safety		Registered Users	All Members	
Bev Director	lsEmpty NotIsEmpty	t	Fire Safety		Registered Users	All Members	
bill	IsNull	t	Fire Safety		Registered Users	All Members	
BJones	NotisNull	t	Fire Safety		Registered Users	All Members	

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

Learner List

Learners				\sim
Drag a column header	r and drop it here to group b	y that column		
Username	Enrollment Type	Folder Title	Rolename	Team
nelson 🗄 🍸	T	T	Ţ	Ţ
Nnelson	Role Folder Enrollment	Fire Safety	Registered Users	All Members
K • 1 > > 20) •			

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.

Pccord LMS	🗷 🛛 LMS Administrator	ү Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin	
Catalog Roles Teams Actions Configuration	Active Team: All Members	•
Catalog		Q
Copy To * Move To * Remove / Delete		Q
 ✓ □ My Catalog ▶ □ □Orphans ▶ □ □ hidden 		
 Characterization Courses Characterization Courses Characterization Charact		
 test ILT test ilt My new session - Fri 13 Sep 2019, 5:00 PM - 6:00 PM MDT 		
Tavi Session - Sat 31 Aug 2019, 1: Session Details DPM MDT DPM MDT		
E Session 2 - test Corporate Heado Session Roster g 2019, 7:00 PM - 8:00 PM EDT E First of August Session - Thu 1 Au Learner List 11:59 PM MDT End of July Session - Sat 27 Jul 2019, 12:00 AM - 11:59 PM MDT		

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.

Learners				~
Drag a column he	ader and drop it here to	group by that colu	nn	
Username	Enrollment Type	Folder Title	Rolename	Team
	T		T	T
bblogger	Role Folder Enrollment	Fire Safety	Registered Users	All Members
bfalb	Role Folder Enrollment	Fire Safety	Registered Users	All Members
bfleming	Role Folder Enrollment	Fire Safety	Registered Users	All Members
billybob	Role Folder Enrollment	Fire Safety	Registered Users	All Members
bjones	Role Folder Enrollment	Fire Safety	Registered Users	All Members
bwilliams	Role Folder Enrollment	Fire Safety	Registered Users	All Members
cblessing	Role Folder Enrollment	Fire Safety	Registered Users	All Members
bwilliams	Role Folder Enrollment	Fire Safety	Registered Users	All Members
cblessing	Role Folder Enrollment	Fire Safety	Registered Users	All Members
cglosser	Role Folder Enrollment	Fire Safety	Registered Users	All Members

Return

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

Learners							\sim
Drag a column h	eader and drop it here to ខ្	group	by that column				
Username	Enrollment Type		Folder Title		Rolename	Team	
nelson 🗎	NoFilter			T	T		T
Amarquez	Contains	t	Fire Safety		Open Sesame Plus	All Members	
Amarquez	DoesNotContain StartsWith	t	Fire Safety		Registered Users	All Members	
Arideout	EndsWith	t	Fire Safety		Registered Users	All Members	
ArtieA	EqualTo	t	Fire Safety		Registered Users	All Members	
Bdavidson	NotEqualTo GreaterThan	t	Fire Safety		Registered Users	All Members	
beckym	LessThan	t	Fire Safety		Registered Users	All Members	
beckyw	GreaterThanOrEqualTo	t	Fire Safety		Registered Users	All Members	
beckyy	LessThanOrEqualTo Between	t	Fire Safety		Registered Users	All Members	
beckyz	NotBetween	t	Fire Safety		Registered Users	All Members	
Bev Director	lsEmpty NotIsEmpty	t	Fire Safety		Registered Users	All Members	
bill	IsNull	t	Fire Safety		Registered Users	All Members	
BJones	NotisNull	t	Fire Safety		Registered Users	All Members	

The list will refresh, showing only any usernames which contain **'nelson'**.

Learner List

Learners				\sim
Drag a column header	and drop it here to group b	y that column		
Username	Enrollment Type	Folder Title	Rolename	Team
nelson 🗄 🝸	T	T	Ţ	Ţ
Nnelson	Role Folder Enrollment	Fire Safety	Registered Users	All Members
I I I I 20	•			

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; <u>Enrollment</u>.

- 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.

Pccord LMS	🗷 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Learning Catalog	Q
Teams, Roles & Learners	>
Actions	>

- 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.

Teams, Roles & Learners		\sim
Active Team: 🕕 All Team Members: 🚯		
Learning Roles: 🕕	Global Roles Boston-North Office LMS Example Learning Roles	
Learners: 🚯	Translation Roles Show Search	

- Click **Actions** heading to open panel.
- From the Select Action dropdown menu, select Add Enrollment.

Teams, Roles & Learners		~
Active Team: 🕕	All Members	
All Team Members: 🕕		
Learning Roles: 🕚 Learners: 🚯	< Select Action > Add Enrollment Drop Enrollment Add to Electives Drop from Electives Query Learning Catalog Query Learning Roles and Members Create LE Attempt Records Delete LE Attempt Records	
Actions	Recalculate Folder Attempt Records	\sim
Select Action: 🕕	< Select Action >	

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.

Actions	× .
Enroll the selected Folders, LEs and Sessions to the selected Team Members	s, Learning Roles and/or Learners.
Select Action: Add Enrollment Auto Register Sessions: Submit	✓

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.

Co	n	fi	r	r	Y	۱
----	---	----	---	---	---	---

Are you sure you want to Enroll the selected Folders, LEs
and Sessions to the selected Team Members, Learning
Roles and/or Learners?



Virtual ILT (VILT)

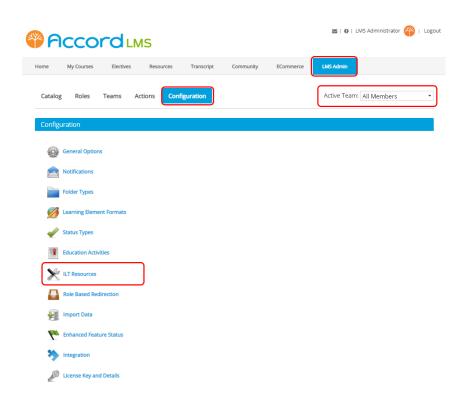
Virtual Instructor Led Training (VILT) Sessions are similar to Instructor Led Training (ILT) Sessions, except that the Locations for VILT Sessions are virtual, hosted via a webinar rather than a physical classroom.

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

Return

Resources can only be edited by the Owner or their Parents	
Individual Instructors	>
Role Instructors	>
Locations	>

• Click Add New Location.

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
S Classroom A	25	Active	All Members
S Conference Room	25	Active	All Members
S Corporate Headquarters	50	Active	All Members
🖌 GoToWebinar		Active	All Members
Secondary Training Room		Active	All Members
I I </td <td></td> <td></td> <td>7 items in 1 pages</td>			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.

Location	>
Name: * 🕕 WebEx	
Status: 🕦 🖲 Active 🔘 Inactive	
Location Type: 🜒 Virtual - General 👻	
Max Learners: 🕦	
Information URL: http://	in
Owner: 🚯 All Members 🔹	
Team Availability: * 🕦 🕞 All Members	
Description: 🚯	
$ \hline \bullet \bullet & $ \bullet $ \bullet $ B I I $ 8 Normal $ $ $ $ $ $ $ $ $ $ $ $ $ $ $ $ $ $ $$	
Design HTML	
Create Cancel	

The newly created Virtual Location will now display in your **Locations** list.

ag 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
Webex		Active	All Members
A ↓ 1 ▶ ▶ Page Size: 20 ▼			7 items in 1 page

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; <u>Instructor Led</u> <u>Training</u>

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.

PCCOTO LMS	≤ 0 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog	
Copy To * Move To * Remove / Delete My Catalog My Catalog Corphans Corphans Corphans Soft First Aid Certification Soft First Aid Certification Corphans Cor	0
O Distracted Driving	
 Instructor Led CPR Training Annual Safety Review Annual Safety Review Annual Safety Review First Aid and CPR Refresher New Hire Training New Hire Training LE Details LE Conditions & Limits LE Completion Events LE Notifications LE Sessions Learner List 	

In the LE Sessions windows that display:

• Click Add New Session.

LE Sessions

Accord Learner Training Workshop	\sim
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.

General Settings	~
Name: * 🕕	Welcome Webinar
Start Date Time: * 🕕	03/27/2020 🖩 09:00 PM 👸 🗏 All day
End Date Time: * 0	03/27/2020 III 10:00 PM
Time Zone: 0	Recurrence
Time Zone: 🛡	(UTC-07:00) Mountain Time (US & Ca ▼ □ Use Learner's Timezone
Location: 🕕	<select location=""></select>
Instructor: 0	<select location=""> Behavioral Health Training and Education Network [max 25] Classroom A [max 25]</select>
Notifications	Conference Room [max 25] Corporate Headquarters [max 50]
Advanced Settings	GoToWebinar Secondary Training Room

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.

Accord LMS

- 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.

	Location: 0	Webex	T	
	Join Webinar URL: * 🛽	http://global.webex.com/join/33447266	Launch Webinar	
	Utilization Tracking: 0	Holic	۲	
	Instructor: 0	"Attended" on Open <select instructor=""></select>	T	
				,
Notificat	ions			
Notificat Advance	tions ed Settings			

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.

Utilization Tracking: 🕕	None	~	
	None		
	"Complete" on Open		
	"Incomplete" on Open		
	"Complete" on All poll questions a	nswe	red

After clicking update the new VILT session will then display under the LE Sessions list; as demonstrated below.

LE Sessions

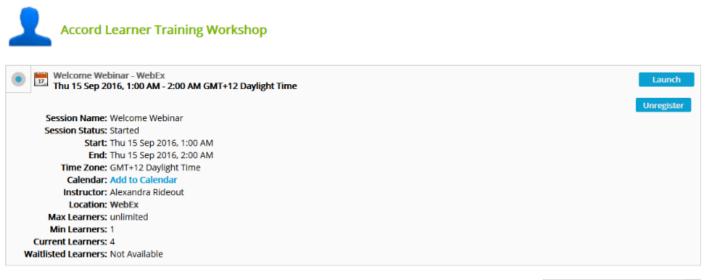
Return

Accord Learner Train	ning Workshop						\sim
Refresh							4 8
Name	Start Date	Location	Instructor	Min	Max	Registered	Waitlisted
(T	7	Т	T		T	T
🖉 🤽 Welcome Webin	ar 27 Mar 2020	Webex	Charles Cooper	· 1	unlimit	ed 0	0
K ◀ 1 ► ► Pag	e Size: 20 🔻					1 items	in 1 pages
Refresh							4 8 9
Add New Session							

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.



Search for Learning

The **Add to Calendar** link allows a Learner to download a .ics file that can include a link to the webinar.

Accord Learner Training Workshop	
Welcome Webinar - WebEx Thu 15 Sep 2016, 1:00 AM - 2:00 AM GMT+12 Daylight Time	Launch
Session Name: Welcome Webinar Session Status: Started Start: Thu 15 Sep 2016, 1:00 AM End: Thu 15 Sep 2016, 2:00 AM Time Zone: GMT+12 Davight Time Calendar: Add to Calendar Instructor: Alexandra Rideout Location: WebEx Max Learners: unlimited Min Learners: 1	Unregister
Current Learners: 4 Waitlisted Learners: Not Available	
	Search for Learning

The **Launch** button will open the VILT Webinar in a modal or popup window once ready to start.

Accord Learner Training Workshop	
Welcome Webinar - WebEx Thu 15 Sep 2016 1:00 AM - 2:00 AM GMT+12 Daylight Time	Launch
Thu 15 Sep 2016, 1:00 AM - 2:00 AM GMT+12 Daylight Time	
	Unregister
Session Name: Welcome Webinar	
Session Status: Started	
Start: Thu 15 Sep 2016, 1:00 AM	
End: Thu 15 Sep 2016, 2:00 AM	
Time Zone: GMT+12 Daylight Time	
Calendar: Add to Calendar	
Instructor: Alexandra Rideout	
Location: WebEx	
Max Learners: unlimited	
Min Learners: 1	
Current Learners: 4	
Waitlisted Learners: Not Available	
	Search for Learning

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.

ontion	Intor
пацоп	
nation	mon

Launch wi	ll be enabled 10 minutes prior to	
Session st	art	
Ok		

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.

	Registration: -								
	Waitlist: No								
Refresh Bulk Update	Save Data	Include Availa		-					📋 🖂 🎍
ξ 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
T	T	T	AII 👻 🝸	All 🔹 T	All 🔻 T	All 🔻 T	T	All T	
izmadmin	IZM	Admin		Registered ~				~	09/15/2016
Imsadmin	LMS	Administrator		Registered ~				~	09/15/2016
pablo.guigou@accordl	ms.com Pablo	Guigou		Registered ~				~	09/15/2016
pablog	Pablo	Guigou		Registered ~				~	09/15/2016
Imsadmin pablo.gulgou@accordl	LMS ms.com Pablo	Administrator Gulgou		Registered ~ Registered ~				~	09/15/2016

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**.

P	ссо	rd	MS					🛛 🛛 LMS Administrator 🍄 Logou	t
Home	My Courses	Electives	s Reso	ources	Transcript	Community	ECommerce	LMS Admin	
Catalog	Roles	Teams	Actions	Confi	guration			Active Team: All Members)
Configu	iration								
ŵ	General Optior	ns							
	Notifications								
	Folder Types								
ø	Learning Elem	ent Formats							
1	Status Types								
	Education Activ	vities							
st	ILT Resources								
-	Role Based Re	direction							
	Import Data								
7	Enhanced Feat	ture Status							
*	Integration								
	License Key an	nd Details							

• Expand Virtual ILT.

Paccord LMS	🛛 🛛 LMS Administrator 🍄 Logo
Home My Courses Electives Resources Transcript Community ECommer	ce LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
General Options	
General Settings	>
Default Settings	>
Folder Attempt Processing	>
Virtual ILT	>
Search	>
Enrollment Log	>
Diagnostic Trace	>
Update Cancel	

- **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	\sim
VILT Launch Preview: 🕦 10 min.	
Force Open New Window For Mobile: 🚯 🛛 🖻	
Search	>
Enrollment Log	>
Diagnostic Trace	>
Update Cancel	

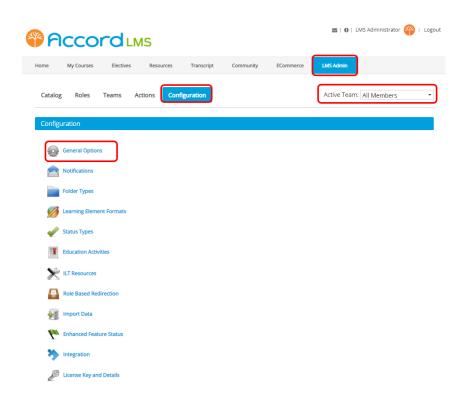
Display or Filter Sessions by Specific Instructors

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		\sim
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: 🚺	E	
SCORM Student Id: 🕦	O 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 <u>www.accordlms.com</u>.

Should you need to contact **Integrity Advocate** directly, their website may be reached here; <u>Integrity Advocate</u>

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.

P		rd	LMS					🕿 🛛 LMS Administrator 🍄 Log	out
Home	My Courses	Elective	s Reso	ources	Transcript	Community	ECommerce	LMS Admin	
Catalog	g Roles	Teams	Actions	Config	uration			Active Team: All Members)
Config	uration								
Ô	General Option	ns							
	Notifications								
	Folder Types								
Ø	Learning Elem	ent Formats							
1	Status Types								
	Education Activ	vities							
st	ILT Resources								
-	Role Based Re	direction							
	Import Data								
P	Enhanced Feat	ture Status							
*	Integration								
a second	License Key an	nd Details							

The page will then refresh, allowing you to setup various types of integration.

• Click on Integrity Advocate Proctoring to open this panel.

Integration



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 <u>www.accordlms.com</u>. Update

Return

Integrity Advocate Proctoring	\sim
their web camera and present an ID, if required. Th	proctoring provided by Integrity Advocate. Learner's web camera. When a proctored Learning Element is first Launched, the Learner must enable e camera will then capture random images during the LE presentation or exam. The captured images are dation of the LE completion and / or score. The validation is then returned to the LMS for tracking and
Enable Proctoring: ① Application ID: ① API2 Key: ①	✓ Test Connection

Your Portal is now ready to have Learning Elements Proctored

Please see the following article to configure Reports to capture and present Proctoring data.

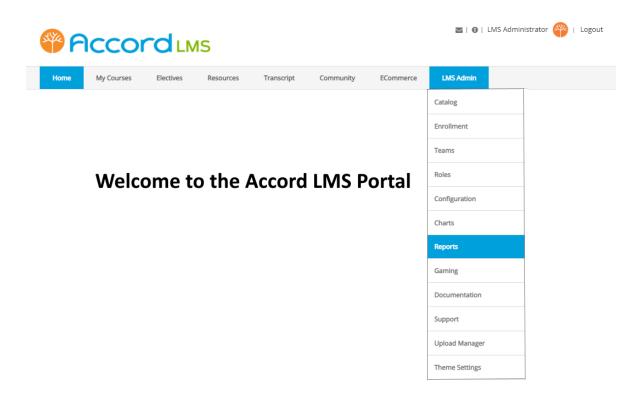
Configure Reports to Present Proctoring Data

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.

Accord LM5

Quick Reports	
Sasy Configuration	
LE Activity with Learner Detail	< Select Report Definition > Continue
Learner Activity	earners
Learner Activity/Transcript with Folder Detail	< Select Report Definition > Continue
Learner Activity/Transcript with LE Detail	< Define New Report > Continue
Learner Activity/Score with Question Detail	< Define New Report > Continue

If necessary, click on **Display Columns** to open this panel.

Reports	Activity	Configuration	Active T	eam: All Mem	bers •
	-	nscript with LE Deta ty/Transcript with LE Deta			
Definition	ns				>
Filters					>
Advance	d Options				>
Display C	olumns				>
Generate	e Report				
Return					

- 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.

PACCORD LMS

Learning Elements

Team		Complete	Points	Proctoring Status
Role		In Progress	Possible	Proctoring API Response
Due Date		Not Attempted	Passing	Comments
Learning Folder Path	•	Success	Duration	Manager Created Date
Folder Name		Passed	Date	Created By
Folder Type		Failed	Time	Assignment
LE Name	•	EA Name	Reference	Score
Completion		EA Value		

When the Report is generated, the **Comments** and **Proctoring Status** columns will now be displayed.

Refresh															
Drag a column h	header and drop it h	here to	o group by tha	t colı	ımn.						_		_		
User Name	Course	I	Folder Type		LE Name	Completion		Success		Comments		Proctoring St	atus	MiddleName	
	T	T		T	T		T		T		T		T		T
Agray	LMS Learner Training		Folder		Accord Learner Training Workshop	Not Attempted									

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.

	🛛 0 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcripts Community ELearning Store	LMS Admin UI Patterns
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog	
Copy To * Move To * Remove / Delete Image: Second	۲
First Aid: Introduction to First Aid LE Details	
Wound Care Quiz LE Conditions & Limits LE Completion Events LE Notifications Launch LE Learner List	

The LE Details field will open.

While in General Settings;

- Check box for **Enable Proctoring.**
- Scroll to bottom and click **Update** to save changes.

General Sett	ings		~
	Name: * 🛽	First Aid: Introduction to First Aid	
Lear	ning Element Format: 🕕	Presentation - Only Completion - Modal Window *	
Custom	Window Dimensions: 🕕		
	Enable Proctoring: 1		
	Description: 0		
	🕂 • 🕭 • B I 🗉	8 Normal ≅ ≙ ≅ ≡ ≣ 43 8	
	First Aid Introduction		
	Design HTML		
	SCO: * 🕚	f78bb712-94ac-6c54-496d-10ab93c1378c	
		Upload New Content Object	
		Download ZIP file	
	Version History: 0	Created: Anonymous User on 29 November 2016 at 8:28:27 PM	
	·,,,,,,		
dvanced Se	ettings		>
Remote SCC			

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 - 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.

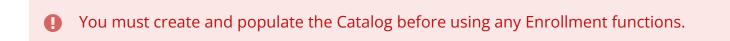
LMS Admin Enrollment allows an LMS Admin to;

- 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.

Pccord LMS	🛛 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Learning Catalog	~
 My Catalog first Aid Certification Self-Enrollment Catalog - Health Care OSHA Driver Safety First Aid and CPR Refresher Mew Hire Training 	0
Teams, Roles & Learners	>
Actions	>



Introductory information (not covered in this chapter) for working with the LMS Admin
 > Catalog tree grid is found in the <u>Tree Grid</u> 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.

Accord	🕿 🛛 LMS Administrator 🍄 Logo
Home My Courses Electives Resources Transcript Comm	nunity ECommerce LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Learning Catalog	× .
 My Catalog 	Q
Teams, Roles & Learners	>
Actions	>

• All Team Members: Check the box to include All Team Members or leave it unchecked to select specific Learning Roles.

Teams, Roles & Learners		\sim
Active Team: All Team Members: Learning Roles:		
Learners: 🚺	Show Search	
Actions		>

• Alternatively, select the desired **Learning Roles** (those which you have access to) that you want to assign to the selected folders and Learning Elements.

Teams, Roles & Learners		~
Active Team: 🜒 All Team Members: 🕕		
Learning Roles: 🕕	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🕕	Show Search	
Actions		>

• Expand the **Actions** section.

Teams, Roles & Learners		\sim
Active Team: 📵	All Members	
All Team Members: 🕕		
Learning Roles: 🕚	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🚯	Show Search	
Actions		>

• Select Add Enrollment from the Action Panel.

	< Select Action > Add Enrollment Drop Enrollment Add to Catalog	
Learners: 0	Drop from Catalog Query Learning Catalog Query Learning Roles and Members	
Learners: U	Create LE Attempt Records Delete LE Attempt Records Restore LE Attempt Records	
Actions	Recalculate Folder Attempt Records Export Enrollment to CSV	× .
Select Action: 🕕	< Select Action > V	

Accord LMS

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**.

Actions		\sim
Enroll the selected Folders, LEs and Sessions to the	e selected Team Members, Learning Roles and/or Learners.	
Select Action: Auto Register Sessions:		

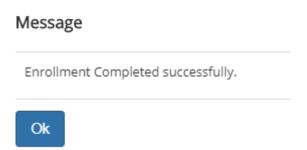
A window displays asking, **Are you sure you want to Enroll the selected Folders, LEs and Sessions to the selected Team Members, Learning Roles and/or Learners?**

• Click Yes.

Confirm	
and Sess	sure you want to Enroll the selected Folders, LEs ions to the selected Team Members, Learning d/or Learners?
Yes	No

A confirmation message displays: Enrollment Completed successfully.

• Click **Ok** to return to Enrollment.



Accord LM5

- **()** Unless Learning Roles, Learners or All Team Members have been selected, you will be prompted to select them before proceeding.
- **()** 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.

A	ccc	rdu	MS				🛛 0 LMS Administrato	r ү i La
lome	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
Catalog	g Roles	Teams	Actions Co	nfiguration			Active Team: All Members	8
Learni	ng Catalog							~
) 	 First Aid Ce Self-Enrolln OSHA Drive 	nent Catalog - He r Safety d CPR Refresher	alth Care					0
Teams	, Roles & Le	arners		,				>
Action	s							>

• All Team Members: Check the box to include All Team Members or leave it unchecked to select specific Learning Roles.

Teams, Roles & Learners		\sim
Active Team: () All Team Members: ()		
Learning Roles: 🕚	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🚯	Show Search	
Actions		>

• Alternatively, select the desired **Learning Roles** (those which you have access to) that you want to drop from the selected Folders and Learning Elements.

Teams, Roles & Learners		× .
Active Team: 🜒 All Team Members: 🜒		
Learning Roles: 🕦	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🚯	Show Search	
Actions		>

• Expand the **Actions** panel.

Teams, Roles & Learners	✓
Active Team: 🚯	All Members
All Team Members: 🕕	
Learning Roles: 🕕	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management
Learners: 🕚	Employee - New Hire Show Search
Actions	>

• 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**.

Actions	\sim
Drop the selected Folders, LEs and Sessions from the selected Team Members, Learning Roles and/or Learners.	
Select Action: Drop Enrollment	
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.

Are you	sure you want to Drop the selected Folders, LEs
and Ses	sions from the selected Team Members, Learning
Roles a	nd/or Learners?
KOIES al	Id/or Learners?

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.

1 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

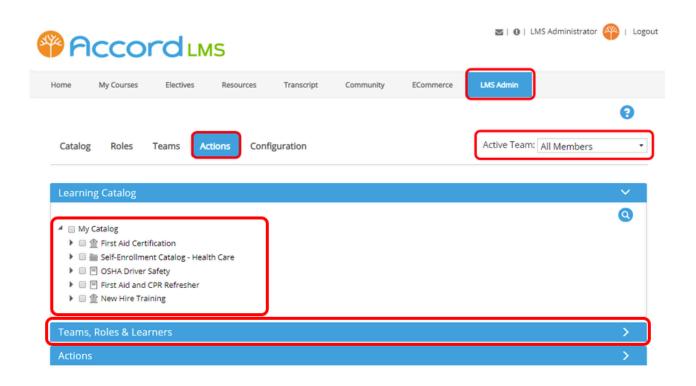
Specify any Learning Catalog Folders (which includes their associated Learning content) that will be visible to Learners on your Team and/or any Learning Roles (which includes the Role associated Learners).

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.

Teams, Roles & Learners		\sim
Active Team: 🚯	All Members	
All Team Members: 🜒		
Learning Roles: 🕦	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🕚	Show Search	
Actions		>

• 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.

Teams, Roles & Learners		×	/
Active Team: 🜒 All Team Members: 🚯			
Learning Roles: 🗊	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 		
Learners: 🚯	Show Search		
Actions		2	>

• After making any selections as mentioned above; expand the **Actions** panel.

Teams, Roles & Learners	\sim	
Active Team: 🚯	All Members	
All Team Members: 🕚		
Learning Roles: 🕚	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management 	
Learners: 🕚	Employee - New Hire Show Search	
Actions	>	

• Select Add to Catalog from the Action Panel dropdown menu.

Learners: 🕦	< Select Action > Add Enrollment Drop Enrollment Add to Catalog Drop from Catalog Query Learning Catalog Query Learning Roles and Members Create LE Attempt Records Delete LE Attempt Records	
Actions	Restore LE Attempt Records Recalculate Folder Attempt Records	×
Select Action: 🚯	Export Enrollment to CSV < Select Action >	

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					
the sele	a sure you want to Present the selected Folders to ected Team Members, Learning Roles and/or rs 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.

PA	ccc		IS				🔤 🕕 LMS Administrato	r 🍄 Logou
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
Catalog	Roles	Teams A	ctions Cont	îguration			Active Team: All Members	•
Learnin	g Catalog							\sim
	First Aid Ce Self-Enrolln OSHA Drive	nent Catalog - Hea r Safety d CPR Refresher	ith Care					0
Teams,	Roles & Le	arners						>

• 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.

Teams, Roles & Learners		\sim
Active Team: 🚯	All Members	
All Team Members: 🕦		
Learning Roles: 🕕	Global Roles	
	Certifications	
	Customer - Training and Resources	
	Commerce Roles	
	🕨 🔲 Employee - Compliance	
	🕨 🔲 Employee - Management	
	🕨 🔲 Employee - New Hire	
Learners: 🚺	Show Search	
Actions		>

• 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.

Teams, Roles & Learners		✓
Active Team: 🜒 All Team Members: 🕦		
Learning Roles: 🜑	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🕦	Show Search	
Actions		>

• Expand the **Actions** panel.

Teams, Roles & Learners	\sim
Active Team: 🚯	All Members
All Team Members: 🕕	
Learning Roles: 🕚	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire
Learners: 🚯	Show Search
Actions	>

• Select **Drop from Catalog** from the **Action Panel**.

	< Select Action > Add Enrollment Drop Enrollment Add to Catalog	
Learners: ①	Drop from Catalog Query Learning Catalog Query Learning Roles and Members Create LE Attempt Records Delete LE Attempt Records Restore LE Attempt Records Recalculate Folder Attempt Records	~
Select Action: 🕦	Export Enrollment to CSV < Select Action > V	

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**.

Actions	\sim
Remove the selected Folders (and associated LE) from the selected Team Members, Learning Roles and/or Learners from the Learner's Catalog.	
Select Action: 🕦 Drop from Catalog 🔻	
Submit	

() 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.

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.

Confirn	n
from th	sure you want to Remove the selected Folders e selected Team Members, Learning Roles and/or rs 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.

Accord	🕿 🛛 LMS Administrator 🍄 Logo	
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin	
Catalog Roles Teams Actions Configuration	Active Team: All Members	
Learning Catalog	~	
 My Catalog first Aid Certification Self-Enrollment Catalog - Health Care OSHA Driver Safety First Aid and CPR Refresher Mew Hire Training 	0	
Teams, Roles & Learners	>	
Actions	>	

• Select Query Learning Catalog from Action Panel.

		< Select Action >	
		Add Enrollment	
		Drop Enrollment	
		Add to Catalog	
		Drop from Catalog	
		Query Learning Catalog	
Teams, Roles & Learners		Query Learning Roles and Members Create LE Attempt Records Delete LE Attempt Records	
Actions		Restore LE Attempt Records Recalculate Folder Attempt Records	
		Export Enrollment to CSV	
	elect Action: 📵	< Select Action >	

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.**

Actions		\sim
Query the selected Folders, Learning Elements and S	sessions and show associated Team Members, Learning Roles and/or Learners.	
Type: 🚯 🖉	Query Learning Catalog Learner My Courses Learner Catalog Active Parent(s) All Match All Match Any	
Submit		

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**.

Actions		\sim
Query the selected Folders, Learning Elements and	l Sessions and show associated Team Members, Learning Roles and/or Learners.	
Select Action: 🚯	Query Learning Catalog	
Type: 🚯	🖲 Learner My Courses 🔍 Learner Catalog	
Team: 🚯	● Active Parent(s) All	
Criteria: 🕦	Match All Match Any	
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**.

Teams, Roles & Learn	ers	
	Active Team: 🕦	All Members
	All Team Members: 🕦	8
	Learning Roles: 🚯	 Global Roles Certifications
l		 Customer - Training and Resources Commerce Roles
		Employee - Compliance
		Employee - Management
		Employee - New Hire
	Learners: 🕦	Show Search

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.

Pccord LMS	🛛 0 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Learning Catalog	~
 My Catalog 	0
Teams, Roles & Learners	>
Actions	>

• 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.

Teams, Roles & Learners		~
Active Team: 🜒 All Team Members: 🕦		
Learning Roles: 🕦	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🚯	Show Search	
Actions		>

• Expand the **Actions** panel.

Teams, Roles & Learners		\sim
Active Team: 🕚	All Members	
All Team Members: 🕕		
Learning Roles: 🕚	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🚯	Show Search	
Actions		>

• Select Query Learning Roles and Members from the Action Panel.

Learners: 🕦	< Select Action > Add Enrollment Drop Enrollment Add to Catalog Drop from Catalog Query Learning Catalog Query Learning Roles and Members Create LE Attempt Records Delete LE Attempt Records	
Actions	Restore LE Attempt Records Recalculate Folder Attempt Records	~
Select Action: 🕕	<pre>Export Enrollment to CSV < Select Action > </pre>	

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**.

tions		~
Query the selected Team Members, Learning Role	s and/or Learners and show associated Folders, Learning Elements and Sessions.	
Team: 🚯	Query Learning Roles and Members ▼ ● Learner My Courses ● Learner Catalog ● Active ● Parent(s) ● All ● Match All ● Match Any	
Submit		

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.

Actions		~
Query the selected Team Members, Learning Roles	and/or Learners and show associated Folders, Learning Elements a	and Sessions.
Select Action: 🚯	Query Learning Roles and Members V	
Туре: 🚯	Iearner My Courses	
Team: 🕦	● Active ○ Parent(s) ○ All	
Criteria: 🕦	Match All O Match Any	
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**.

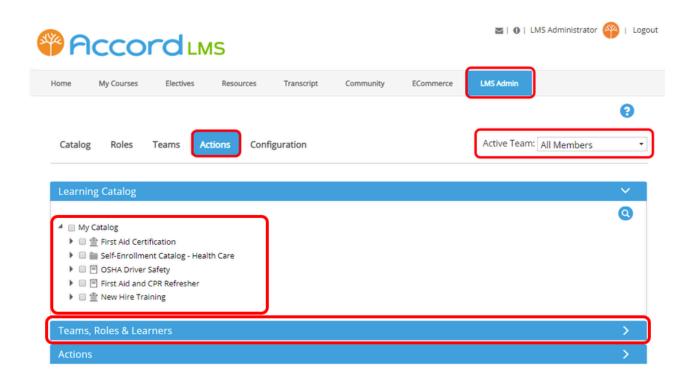
To Create LE Attempt Records;

- 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; <u>http://help.accordlms.com/m/11168/l/</u> 256147-session-roster



PACCORDING

• All Team Members: check the box to include All your Team Members or leave it unchecked to select specific Learning Roles.

Teams, Roles & Learners		~
Active Team: 🕚		
All Team Members: 🕚		
Learning Roles: 🕕	🕨 🔲 Global Roles	
	Certifications	
	Customer - Training and Resources	
	Commerce Roles	
	Employee - Compliance	
	Employee - Management	
	Employee - New Hire	
Learners: 🚯	Show Search	
Actions		>

• If opting not to select **All Team Members**, select any desired **Learning Roles** or **Learners** for which you wish to create attempt records for.

Teams, Roles & Learners		~	/
Active Team: 🜒 All Team Members: 🜒			
Learning Roles: 🕦	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 		
Learners: 🕦	Show Search		
Actions			>

• Expand the **Actions** panel.

Teams, Roles & Learners		~
Active Team: 📵	All Members	
All Team Members: 🕕		
Learning Roles: 🕕	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management 	
Learners: 🚯	Employee - New Hire Show Search	
Actions		>

• Select the **Create LE Attempt Records** from the **Action Panel**.

	< Select Action > Add Enrollment	
	Drop Enrollment Add to Catalog	
Learners: 🕦	Drop from Catalog Query Learning Catalog Query Learning Roles and Members	
	Create LE Attempt Records Delete LE Attempt Records	
Actions	Restore LE Attempt Records Recalculate Folder Attempt Records	× .
Select Action: 🚺	Export Enrollment to CSV < Select Action >	

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.**

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 T	
Score: 🕦		
Score Type: 🚯		
Duration: * 🚯	00:00:00 (HH:MM:SS)	
Slide Position: 🕦		
Date: * 🕦	2/21/2020	
Time: 🕦	11 V: 35 V	
Comments: 🚯		
Archived: 🚯		
Submit		

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: (1)	Complete In Progress In Progres In Progres In Progres In Progres 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.

Message

Your Learning Content selection includes Instructor Lead Training (ILT). Attempt records for ILT cannot be created from the Action Panel. ILT attempt records can be created from the Session Roster which is accessed from the Catalog tab.



Confirm

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.

Are you sure you want to create the specified Folders and LE Attempt Records for the selected Team Members, Learning Roles and/or Learners?
You currently have:
25- Active Learners
unlimited - Active Learner License Limit
This action will create:
226 - New Attempt Records
0 - Additional Active Learners
25– Total Active Learners
Yes No

A confirmation window will then display which reads; **(X) Attempt Records were Created successfully**.

• Click **Ok** to close window.

Message

226 Attempt Records were Created successfully.



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.

Accord	🕿 🛛 LMS Administrator 🍄 Logou
Home My Courses Electives Resources Transcript Community EComme	rce LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Learning Catalog	~
 My Catalog 	0
Teams, Roles & Learners	>
Actions	>

• To select **All Team Members**, check box to include **All** of your **Team Members**.

Teams, Roles & Learners		\sim
Active Team: 🌒	All Members	
All Team Members: 🕦		
Learning Roles: 🕕	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management 	
Learners: 🚺	Employee - New Hire Show Search	
Actions		>

- 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.

Teams, Roles & Learners	\sim
Active Team: 🜒 All Team Members: 🕕	
Learning Roles: 🕚	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire
Learners: 🚺	Show Search
Actions	>

• Select Delete LE Attempts Records from the Action Panel.

	< Select Action >	
	Add Enrollment	
	Drop Enrollment	
	Add to Catalog	
	Drop from Catalog	
	Query Learning Catalog	
Learners: 🕦	Query Learning Roles and Members	
	Create LE Attempt Records	
	Delete LE Attempt Records	
	Restore LE Attempt Records	
Actions	Recalculate Folder Attempt Records	
	Export Enrollment to CSV	
Select Action: 🕦	< Select Action >	v
	·	

Accord LMS

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.**

Actions	× .	
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.		
Select Action: 🚯	Delete LE Attempt Records	
Created By: ① Status: ① Start Filter: ① End Filter: ①	 LMS Admin Learner Either Enrolled Unenrolled Either None Specified 2/24/2020 Im Oo ▼ Oo ▼ Oo ▼ Mone Specified None Specified Z/24/2020 Im Z/24/2020 Im Z/24/2020 Im Z/24/2020 Im LMS Admin + Learner Elther Elther Elther Elther Elther Elther Elther	
Current Time: ① Comments: ③ Submit	23 V : 59 V 24 Feb 2020 12:06:43	

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	
Subline	

- **1** 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.



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.

Pccord LMS	🕿 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Learning Catalog	~
 My Catalog First Aid Certification Self-Enrollment Catalog - Health Care OSHA Driver Safety First Aid and CPR Refresher New Hire Training 	٢
Teams, Roles & Learners	>
Actions	>

• All Team Members: check box to include All your Team Members.

Teams, Roles & Learners		\sim
Active Team: () All Team Members: ()		
Learning Roles: 🕚	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🚯	Show Search	
Actions		>

• 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.

Teams, Roles & Learners		~
Active Team: 🜒 All Team Members: 🕦		
Learning Roles: Learners:	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Actions	Show Search)

• Expand the **Actions** panel.

Teams, Roles & Learners		~
Active Team: 🕦	All Members	
All Team Members: 🕦		
Learning Roles: 🕕	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🕕	Show Search	
Actions		>

• Select **Restore LE Attempt Records** from the **Action Panel**.

Learners: 🚺	< Select Action > Add Enrollment Drop Enrollment Add to Catalog Drop from Catalog Query Learning Catalog Query Learning Roles and Members Create LE Attempt Records Delete LE Attempt Records Restore LE Attempt Records	
Actions	Recalculate Folder Attempt Records	\checkmark
Select Action: 🕕	Export Enrollment to CSV < Select Action >	

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	\sim
Restore Attempt Records, that have been Logically and/or Learners. Folder Attempt Records can take a	deleted, for the selected Folders and Learning Elements to the selected Team Members, Learning Roles a few minutes to Update.
Select Action: 🚯	Restore LE Attempt Records
Start Filter: 🚯	 None Specified 2/24/2020
	00 ▼ : 00 ▼ ◎ None [®] Specified
End Filter: 🚯	2/24/2020
Current Time: 🚯	23 ▼ : 59 ▼ 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**.

Select Action: 🚯	Restore LE Attempt Records
Start Filter: 🚯	None Specified
	00 ▼ : 00 ▼ ○ None ● Specified
End Filter: 🕚	2/24/2020
Current Time: 🚯	23 ▼ : 59 ▼ 24 Feb 2020 15:41:31
Comments: 🚯	
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**.

	Confirm	
	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?	
	Yes No	
0	no Learning Roles, Learners or Team Members selected, you will l o select them before proceeding.	be

1 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.



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**.

Му	Cou	rses Configuration	
My Co	urse	s ► LMS Learner Training	
		LMS Learner Training 0% e demonstrates how to use the Accord LMS as a Learner. This course consists of 2 videos and a short quiz. Once you have pass ertificate and print it for your records. Learning Objectives Be	View More 🚦 ed the quiz, you will be able to
+	1	Accord Learner Training Workshop	Sessions
0	Î	Assignment Upload	Launch
0	1	LMS Learner Quiz	Launch
0	1	Certificate of Completion	Launch
0	ø	LMS Experience	Launch
0		Learner Experience	Launch
0		Community Features	Launch
Θ	1	Hands On Learning Training	Sessions
			Search for Learning

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.

P A	ссо	ordu	IS				🕿 🛛 LMS Administrator 🍄	Logo
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
Catalog	Roles	Teams	ctions Conf	iguration			Active Team: All Members	•
Learning	g Catalog							~
	First Aid Cer Self-Enrollm OSHA Drive	nent Catalog - Hea r Safety d CPR Refresher	lth Care					Q
Teams,	Roles & Le	arners						>
Actions								>

• All Team Members: check box to include All your Team Members or leave it unchecked to select specific Learning Roles and or Learners.

Teams, Roles & Lea	irners		\sim
	Active Team: 📵	All Members	
	All Team Members: 🕦		
	Learning Roles: 🕕	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
	Learners: 🚺	Show Search	
Actions			>

• If opting to leave the box for **All Team Members** unchecked, select any **Learning Roles** and or **Learners** desired to recalculate attempt records for.

Teams, Roles & Learners		~
Active Team: 🜒 All Team Members: 🜒		
Learning Roles:	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🚺	Show Search	
Actions		>

• After making selections from above, open the **Actions** panel.

Teams, Roles & Learners		\sim
Active Team: 🕚	All Members	
All Team Members: 🕕		
Learning Roles: 🕕	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🚯	Show Search	
Actions		>

• Select **Recalculate Folder Attempt Records** from the Action Panel menu.

Learners: 🚺	< Select Action > Add Enrollment Drop Enrollment Add to Catalog Drop from Catalog Query Learning Catalog Query Learning Roles and Members Create LE Attempt Records Delete LE Attempt Records	
Actions	Restore LE Attempt Records Recalculate Folder Attempt Records	\sim
Select Action: 🕕	Export Enrollment to CSV < Select Action >	

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**.

Are you	sure you want to Recalculate Folder Attempt for
the selected Folders to the selected Team Members,	
Learning	Roles and/or Learners?
Yes	No

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.

A	ctions	$\mathbf{\vee}$
	Recalculate the Completion Status and Score of the selected Folders. This process may take a few minutes to finalize updates.	
	Select Action: (1) Recalculate Folder Attempt Records V	
	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.

Message		
5 Folder Attempt Records were Updated successfully.		
Ok		

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).

Му	Courses Configuration	
This co	Urses > LMS Learner Training LMS Learner Training 75% Urse demonstrates how to use the Accord LMS as a Learner. This course consists of 2 videos and a short quiz. Once you have passed the certificate and print it for your records. Learning Objectives Be	View More 🗊 d the quiz, you will be able to
+	1 Accord Learner Training Workshop	Sessions
0	1 Assignment Upload	Launch
0	/ LMS Learner Quiz	Launch
0	Certificate of Completion	Launch
0	🧭 LMS Experience	Launch
0	Learner Experience	Launch
0	Community Features	Launch
Θ	Learning Training	Sessions
	2	Search for Learning

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.

	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
Catalog	Roles	Teams A	tions Config	guration			Active Team: All Members	0
Learnir	ng Catalog							~
		tification ient Catalog - Heal r Safety	th Care					0

• From the list select any Learning Roles or Learners whose enrollments you want to verify.

Teams, Roles & Learners		\checkmark
Active Team: 🜒 All Team Members: 🕦		
Learning Roles: 🕚	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🕦	Show Search	
Actions		>

• Expand the **Actions** panel.

Teams, Roles & Learners		~
Active Team: 🚯	All Members	
All Team Members: 🕕		
Learning Roles: 🕚	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management 	
Learners: ()	Employee - New Hire Show Search	
Actions		

• From the Actions menu select Export Enrollment to CSV.

Learners: 🕕	< Select Action > Add Enrollment Drop Enrollment Add to Catalog Drop from Catalog Query Learning Catalog Query Learning Roles and Members Create LE Attempt Records Delete LE Attempt Records	
Actions	Restore LE Attempt Records Recalculate Folder Attempt Records	✓
Select Action: 🚯	<pre>Export Enrollment to CSV < Select Action > </pre>	

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.

Actions	\checkmark
Export all Active Team Enrollment to CSV	
	Export Enrollment to CSV Role Learner All Learner My Courses Learner Catalog Active Parent(s) All Submit

After clicking **Submit** a .csv report will generate which may look similar to the report shown below.

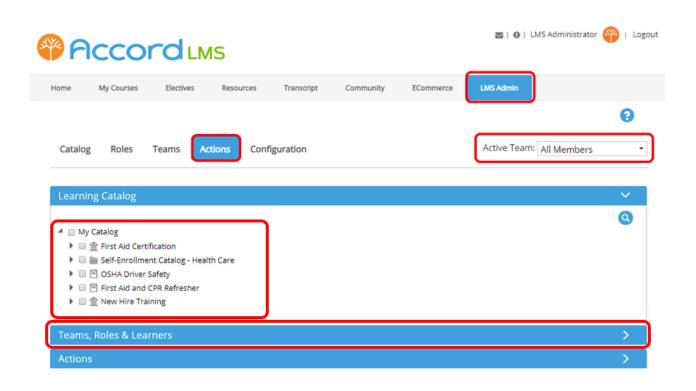
	Α	В	С	D	E	F	G	Н	1	J	K
1	Folder,LE,	Session,Ro	ole,User,Te	am,							
2	LMS Learn	er Trainin	g,,,Acc_Dov	vnloads,,A	II Member	s,					
3	LMS Learn	er Trainin	g,,,Acc_Trai	ning,,All N	/lembers,						
4	LMS Learn	er Trainin	g,,,Commu	nity Learne	ers,,All Me	mbers,					
5	LMS Learn	er Trainin	g,,,LMS Adr	nin Trainir	ng,,All Men	nbers,					
6	LMS Learn	er Trainin	g,, <mark>,LM</mark> S Lea	rner Traini	ng,,All Me	mbers,					
7	LMS Admi	n Training	,,,LMS Adm	in Training	g,,All Mem	bers,					
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.

Teams, Roles & Learners		~
Active Team: 📵	All Members	
All Team Members: 🕦		
Learning Roles: 🕕	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire 	
Learners: 🕕	Show Search	
Actions		>

• After selecting your search criteria click **Search for Learners**.

Learners: 🕦	Hide Search
Search String: 🕕	
Search Field: 🕦	User Name 🔻
Sort Order: 📵	User Name 🔻
l	Select / Unselect

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]	A
	ArtieA [Art Stevens]	
	Bdavidson [Bryant Davidson]	
	beckym [Rebeca Thatcher]	
	Bev Director [Bev Director]	
	bill [William Fleming]	
	Bjones [Bob Jones]	

- Solution 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**.



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.

Acco	ord	.MS				2 0 LM	MS Administrator 🍄 Log
Home My Courses	Electives	Resou	rces Transcript	Community	ECommerce	LMS Admin	
Catalog Roles	Teams	Actions	Configuration			Active Team:	All Members 🔻
Roles							
Roles							
Roles	Filter by Re	ole Group: 📵	Boston-North Of	fice	•	2	
Name	Filter by Ro Rules	ole Group: 🕚 Count	Boston-North Of Activation Date	fice Start Date	- Due Date	Expiration Date	Re-Activation Date
	-				Due Date]	Re-Activation Date

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.

Ho	me My Courses Electives	Resources	Tra	nscript Comm	unity ECc	ommerce	LMS Admin	
	atalog Roles Teams Action	ns Co	onfiguratio	'n			Active Team: Al	l Members
	Filter by Pole Grou	n: 6	Color Tree	te te e				
	Filter by Role Grou	Rules	Safety Tra Count	ining Activation Date	Start Date	• Due Date	Expiration Date	Re-Activation Date
2			1	Activation		Due		

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.

	ne My Courses Electives	Resources	Tra	nscript Comr	munity ECo	ommerce	LMS Admin	
	atalog Roles Teams Actio	ons Co	onfiguratio	n			Active Team: All	Members
	Eller ha Bala Car		Safety Tra	ining		•		
	Filter by Role Gro	up. e	barcey ma	0				
	Name	Rules	Count	Activation Date	Start Date	Due Date	Expiration Date	Re-Activation Date
2				Activation				

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.

PACCORD LMS

Catalog	Enrollment	Roles Tea	ms	Configuration		Active Team:	All Members	•
Group De	etails							\sim
		Group Name: *	0					
		Description	0					
					1			
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.

Catalog Roles Teams Actio	ons	Configuration	(Active Team: All N	Nembers •
Roles					
Filter by Role Grou	up: 🛈	Safety Training <global roles=""></global>	-		
Name	Rules	Certifications	te	Expiration Date	Re-Activation Date
Electricians - Professional Compliance		Customer - Training and Resources		None	None
First Aid Training - Warehouse	1	eCommerce Roles Employee - Compliance Employee - Management	• 019	None	None
Add New Group Add New Role	В	ılk Learner Assignment			

• Click the **Edit** (pencil icon) next to the **Filter by Role Group** dropdown menu in order to edit a specific Role Group.

PACCORD LMS

Catalog	Roles	Teams	Actions	Configura	ition			Active Team: All M	/lembers
Roles									
		Filter by Ro	ole Group: 🕕	Safety Tra	ining		•		
Name			Rules	Count	Activation Date	Start Date	Due Date	Expiration Date	Re-Activation Date
Electrician	s - Profess	ional Complia	ance	0	Immediate	Immediate	None	None	None
First Aid Tr	raining - W	arehouse		11	Immediate	Immediate	25 Dec 2019	None	None

- When page refreshes, make any modifications.
- Click **Update** at bottom to save changes.

Catalog	Roles	Teams	Actions	Configuration	Active Team: All Members	•
Group De	tails					~
		Gro	oup Name: * 🖲	Safety Training		
			Description: (The group will contain required safety training Learning Roles		
Update	Cance	:I				

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.

Rc	les							
	Filter by Role Gr	oup: 🚯	Safety Tra	ining		•		
	Name	Rules	Count	Activation Date	Start Date	Due Date	Expiration Date	Re-Activation Date
	Electricians - Professional Compliance		0	Immediate	Immediate	None	None	None
5	First Aid Training - Warehouse	4	11	Immediate	Immediate	25 Dec 2019	None	None

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.

Role Details	~
General Dates Renewal	
Role Name: * 🕕 🗄	
Description:	
Role Group Name: 🚯 Safety Training 👻	
Include Social Group: 🕕 🛛	
LE Tracking Options: 🕕 Track All Attempts 🔹	
Role Members Update Delete Refresh Expire	
Membership Rules	>
Member Management	>
Enrollment	>
Notifications	>
Return	

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.

Role Details	;			\sim
General	Dates	Renewal		
5		efore Start Date Options: After Due Date Options: Control Con	LE are not allowed to Launch LE are allowed to launch with Tracking LE are allowed to launch with Tracking ILE are allowed to	
Role Update	Delete	All Members Refresh	Expire	

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.

Role Details		\sim
General Dates	Renewal	
	Renew From: 🕕 Non Renewal 💌	
Role	Members	
Update Delete	Refresh Expire	

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 .

Acco	ord	MS				S 0 LMS	5 Administrator 🍄 Logout
Home My Courses	Electives	Resourc	tes Transcript	Community	ECommerce	LMS Admin	
Catalog Roles	Teams	Actions	Configuration			Active Team:	All Members
Roles							
	Filter by Ro	le Group: 📵	<global roles=""></global>		•]	
Name	Rules	Count	Activation Date	Start Date	Due Date	Expiration Date	Re-Activation Date
Administrative Staff		0	Immediate	Immediate	None	None	None
Registered Users		6	Immediate	Immediate	None	None	None
Unverified Users		1	Immediate	Immediate	None	None	None
Warehouse Staff		0	Immediate	Immediate	None	None	None
Add New Group	Add New F	Role Bi	ulk Learner Assignme	ent			

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: () All Members	
Automatic Drop: 📵 🔍 Yes 🖲 No	
Matching Learners: 🕕 0 😋	
Rule	
Hire Date Greater Than Or Equal To I1 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.

P	cco		٨S				🛛 0 LMS	5 Administrator 🍄 Log
Home	My Courses	Electives	Resourc	res Transcript	Community	ECommerce	LMS Admin	
Catalog	Roles	Teams A	actions	Configuration			Active Team:	All Members 🔹
Roles								
		Filter by Role	Group: 🚯	<global roles=""></global>		•]	
Name	e	Rules	Count	Activation Date	Start Date	Due Date	Expiration Date	Re-Activation Date
🖉 Admin	istrative Staff		0	Immediate	Immediate	None	None	None
🖉 Regist	ered Users		6	Immediate	Immediate	None	None	None
🖉 Unver	ified Users		1	Immediate	Immediate	None	None	None
🖉 Wareh	iouse Staff		0	Immediate	Immediate	None	None	None
	ew Group	Add New Ro	bleB	ulk Learner Assignm	ient			

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**.

	Sea	rch String: arideout		ι	Jsername	•	
		Searc	h Clear				
Bulk Update							
Username		Display Name		Role Member	Activation Date	Start Date	Due Date
Username	Ţ	Display Name	Ţ			Start Date	

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.

FICCO					I O I LMS	Administrator 🍄 Logo
Home My Courses	Electives R	esources Transcript	Community	ECommerce	LMS Admin	
Catalog Roles	Teams Action	s Configuration			Active Team:	All Members 🔻
Roles						
	Filter by Role Grou	p: 🕕 <global roles=""></global>		•]	
Name	Rules Cou	Int Activation Date	Start Date	Due Date	Expiration Date	Re-Activation Date
Administrative Staff	0	Immediate	Immediate	None	None	None
Registered Users	6	Immediate	Immediate	None	None	None
Unverified Users	1	Immediate	Immediate	None	None	None
Warehouse Staff	0	Immediate	Immediate	None	None	None

Once in the details panel;

Add New Role

Add New Group

• Scroll down and click on the **Enrollment** header to open this panel.

Bulk Learner Assignment

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**.

Placord LMS

Learner My Courses Learner Electives Select which Learning Content this Role will present in the Learner My Courses. My Catalog My Catalog Sample - Accord LMS Content Sample - LMS Learner Training Sample - LMS Admin Training Sample - LMS Learner Resources	ning Content this Role will present in the Learner My Courses. e - Accord LMS Content uple - LMS Learner Training uple - LMS Admin Training uple - LMS Learner Resources uple - SCORM Content	Select which Learning Content this Role will present in the Learner My Courses. My Catalog Sample - Accord LMS Content Sample - LMS Learner Training	
 My Catalog Sample - Accord LMS Content Sample - LMS Learner Training Sample - LMS Admin Training Sample - LMS Learner Resources 	e - Accord LMS Content aple - LMS Learner Training aple - LMS Admin Training aple - LMS Learner Resources aple - SCORM Content	 My Catalog Sample - Accord LMS Content Sample - LMS Learner Training 	
 Sample - Accord LMS Content Sample - LMS Learner Training Sample - LMS Admin Training Sample - LMS Learner Resources 	nple - LMS Learner Training nple - LMS Admin Training nple - LMS Learner Resources nple - SCORM Content	 Sample - Accord LMS Content Sample - LMS Learner Training 	
 Sample - LMS Learner Training Sample - LMS Admin Training Sample - LMS Learner Resources 	nple - LMS Learner Training nple - LMS Admin Training nple - LMS Learner Resources nple - SCORM Content	Gample - LMS Learner Training	
Graphic - LMS Admin Training Graphic - LMS Learner Resources	nple - LMS Admin Training nple - LMS Learner Resources nple - SCORM Content		
Image: Sample - LMS Learner Resources	iple - LMS Learner Resources iple - SCORM Content	🕨 🔲 🗐 Sample - LMS Admin Training	
	ple - SCORM Content		
	Plus Courses	Sample - SCORM Content	
🕨 🔲 📷 Accord Plus Courses		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.

×	Acco	rdu	ИS				2 0 LM:	S Administrator 🍄 Log
Hom	e My Courses	Electives	Resource	es Transcript	Community	ECommerce	LMS Admin	
	atalog Roles	Teams /	Actions	Configuration			Active Team:	All Members 🔹
		Filter by Role	Group: 🔒	<global roles=""></global>		•	1	
	Name	Rules	Count	Activation Date	Start Date	Due Date	Expiration Date	Re-Activation Date
2	Name Administrative Staff	-			Start Date			Re-Activation Date
2		-	Count	Activation Date		Due Date	Expiration Date	
	Administrative Staff	-	Count 0	Activation Date	Immediate	Due Date None	Expiration Date	None

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.

Paccord LMS

- **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.

Notifications					\sim
Start Date Notifications: 🖲	Level	Value	Туре		
	Final Notice		Days 🝷	Notify LMS Admin	
	Second Notice		Days 🝷	Notify LMS Admin	
	First Notice		Days 💌	Notify LMS Admin	
Due Date Notifications: 💷	Level	Value	Туре		
	Final Notice		Days 💌	Notify LMS Admin	
	Second Notice		Days 🔻	Notify LMS Admin	
	First Notice		Days 🔻	Notify LMS Admin	
	Only Notify if ar	ny Enrolled LE	are not Complete	d.	
Notification Starting Date:	24 Sep 2019				

Click **Update** to save changes.

Update

Cancel

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.

	ne My Courses Electives	Resources	Tra	nscript Comm	nunity ECo	ommerce	LMS Admin	
	oles		nfiguratio				Active Team: All	Members
	Filter by Role G	roup: 🛛	Safety Tra	ining		•		
	Name	Rules	Count	Activation Date	Start Date	Due Date	Expiration Date	Re-Activation Date
				Immediate	Immediate	None	None	None
2	Electricians - Professional Compliance		0	minediate				

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 preassociated 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		
	-	Roles Teams C5V File All Roles All Roles Control Roles Control Roles Control Roles Control Roles Customer - Training and Resources
	Learners: 🕚	Hide Search
	Search String: 🕘 Search Field: 🚳	User Name
	Sort Order: 📵	User Name V Search for Learners
		Select / Unselect
Learning Roles		
	Learning Roles to Assign: 🜒	
	Access Codes: ()	
	Notify Learners: 🔘	
Dates	verride learning role dates @) D
Submit Retu	rn	

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 preassociated 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: () Tearns () Learners: ()	Role Tamp 2 CSV File All Members Hide Search
Search String: () Search Field: () Sort Order: ()	User Name Viser Name Viser Name Viser Charters Search for Learners Search (viselect
Learning Roles	
Learning Roles to Assign: 🕕	Global Roles > Global Roles > Grotal Roles > Gordinations Guotamer-Tailing and Resources Gordinations Gordinations
Access Codes: ()	
Notify Learners: 📵	8
Dates	~
Override learning role dates 🌒	0
Submit Return	

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 preassociated 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 Lea	arners			
			rner Source: () ect CSV File: ()	
Learning	Roles			
	I	Learning Role	es to Assign: 📵	 Global Roles > Certifications Customer - Training and Resources eCommerce Roles
		A	ccess Codes: 📵	
		Not	ify Learners: 🕚	
Dates				✓
	Ov	verride learni	ng role dates (
Submit	Retur	'n		

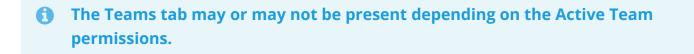


Teams - Introduction

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.

Pccord LMS	🛛 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
	9
Catalog Roles Teams Actions Configuration	Active Team: All Members
Teams	Count
🔺 🌚 All Members	
Learners	5
🖬 Report Admin	0
👤 Team Admin	3
 Image: Second Sec	

This chapter highlights the available features under **Teams**. We will review these features in the following sections.



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.

8 F	Acco		٨S				🖀 🛛 LMS Adm	ninistrator 🍄 Logout
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
Cata	log Roles	Teams	Actions Conf	iguration			Active Team: All M	embers
Теа	ms							Count
-	All Members							112
	Learners							113
	Content Admin							0
	Learner Admin							0
	Report Admin							1
	L Team Admin							4
	Boston Office-Ne	orth	Team A Send T LMS Ac Add Ch	Details Content, Role and Access Codes eam Message dmin Types wild Team ultiple Child Team				

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 CHILD TEAM			•
Team Details			\sim
	Team Name: * 🕕]
	Include Group: 📵		
	Parent Team: 📵	Boston Office-North 🔹	
	Description: 🕕		
	Reference: 🕕]
Rules			>
Remote SCO			>
Update Ref	turn		

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.

	IS	🜌 0 LMS Administrator 🍄 Logout
Home My Courses Electives	Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams A	ctions Configuration	Active Team: All Members
Teams		Count
4 🎯 All Members		
🧟 Learners		113
🧭 Content Admin		0
🚅 Learner Admin		0
🔛 Report Admin		1
1 Team Admin		4
Boston Office-North	Team Details Team Content. Role and Portal Access Team Access Codes Send Team Message LMS Admin Types Add Child Team Add Multiple Child Teams	

*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.

Add Child Teams to Boston Office-N		
Child Teams to Create: * 🖲	North-Storage Warehouse North-Maintenance Workshop	e

	Add Team(s)	Return
--	-------------	--------

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**.

D CHILD TEAMS			
Add Child Teams to Boston Office-I	North		\sim
			8
Child Teams to Create: * 🖲	North-Storage Warehouse North-Maintenance Workshop		
Creation of Child Teams Total Child Teams in List: 2 Total New Child Team Created: 2 Total Duplicate Child Team Ignored:	0		

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.

Accord LMS

- **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.

Rules	\sim
Owner: 🕕	
Automatic Drop: 🕕 OYes No	
Matching Learners: 🕕 🗲	
Rule	*
< Select Field >	×
Add New Parameter	
Add New Rule	
Remote SCO	>
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.

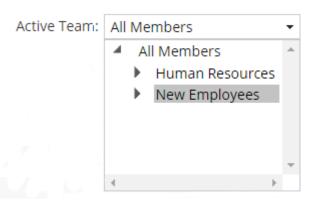
If choosing to enable Remote SCO for this Child Team, click on the Remote SCO heading to open this panel.

- 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 SC	0	\sim
	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.



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.

Pccord LMS	⊠∣0 ∣⊔	MS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin	
Catalog Roles Teams Actions Configuration	Active Team:	(?) All Members
Teams		Count
🖌 💿 All Members		
🧟 Learners		6
🔝 Report Admin		0
L Team Admin		3
 Image: Second Sec		

Engineering Crew

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.

PACCORD LMS	🛛 🕕 LMS Administrator 🍄 Log
Home My Courses Electives Resources Transcript Community E	Commerce LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members 🔹
Teams	Count
4 📦 All Members	
4 Learners	6
📔 Report Admin	0
1 Team Admin	3
Administrative Feature Team Details	
P 🔮 Blue Ribbon	
Generating Team Content, Role and Portal Access Generating Team Access Codes	
Send Team Message	
LMS Admin Types	
Add Child Team	
Add Multiple Child Teams	

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.

Engineering Crew Team Details		\sim
Team Name: * 1 Include Group: 1 Parent Team: 1 Description: 1	Engineering Crew All Members All Members Administrative Crew Blue Ribbon Home Warran Boston Office-North Engineering Crew	
Reference: 0 Version History: 0	Created: LMS Administrator on 6 May 2020 at 7:03:16 PM	
Rules		>
Update Delete Copy F	Return	

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.

Pccord LMS		🕿 🕕 LMS Administrator 🎸	🍄 Logout	
Home My Courses Electives Res	ources Transcript Community	ECommerce	LMS Admin	
Catalog Roles Teams Actions	Configuration		Active Team: All Members	•
Teams				Count
 All Members Learners 				113
Content Admin				0
Learner Admin				0
				1
L Team Admin				4
Boston Office-North	Team Details Team Content. Role and Portal Access Team Access Codes Send Team Message LMS Admin Types Add Child Team Add Multiple Child Teams			

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.

Accord LMS

- 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.

TEAM DETAILS		
Boston Office-North Team Details		\sim
Team Name: * 🗊	Boston Office-North	
Include Group: 🕕		
Parent Team: 🕕	All Members 🔹	
Description:		
Reference: 🕕		
Version History: 🕕	Created: IZM Admin on 31 March 2020 at 8:47:41 PM	
Rules		>
Remote SCO		>
Update Delete Copy	Return	

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.

Rules	\sim
Owner: Owner: Automatic Drop: OYes No Matching Learners: OC	
Rule	
< Select Field >	
Add New Parameter	
Add New Rule	
Remote SCO	>
Update Delete Copy Return	

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.

Accor		🖀 🛛 LMS Administrator 🍄 Logout
Home My Courses	Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles	Teams Actions Configuration	Active Team: All Members
Teams		Count
4 🚳 All Members		
🙎 Learners		113
🧭 Content Admin		0
🖳 Learner Admin		0
📊 Report Admin		1
1 Team Admin		4
Boston Office-Nord	th Team Details Team Content, Role and Portal Access Team Access Codes Send Team Message LMS Admin Types Add Child Team Add Multiple Child Teams	

The **Team Details** panel will open.

• Scroll to bottom and click **Delete**.

Boston Office-North Team Details		\sim
Team Name: * 🕕	Boston Office-North	
Include Group: 🕕		
Parent Team: 🕕	All Members 🔹	
Description:		
Reference: 0		
Version History	Created: IZM Admin on 31 March 2020 at 8:47:41 PM	
Version History: 🕕	Created, 12W Admin on ST March 2020 at 8,47,41 PM	
Rules		>
Remote SCO		>
Remote SCO		

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.

Confirm

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



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.

Pccord LMS				🛎 🕕 LMS Administrato	r 🍄 Logout
Home My Courses Electives	Resources Transcript	Community	ECommerce	LMS Admin	
Catalog Roles Teams Actio	ns Configuration			Active Team: All Members	•
Teams					Count
4 🕥 All Members					
🚨 Learners					113
🧭 Content Admin					0
🧟 Learner Admin					0
📊 Report Admin					1
👤 Team Admin					4
🕨 🥯 Boston Office-North	Team Details				
	Team Content, Role and I	Portal Access			
	Team Access Codes				
	Send Team Message				
	LMS Admin Types				
	Add Child Team				
	Add Multiple Child Teams	5			

The TEAM CONTENT, ROLE AND PORTAL ACCESS window opens.

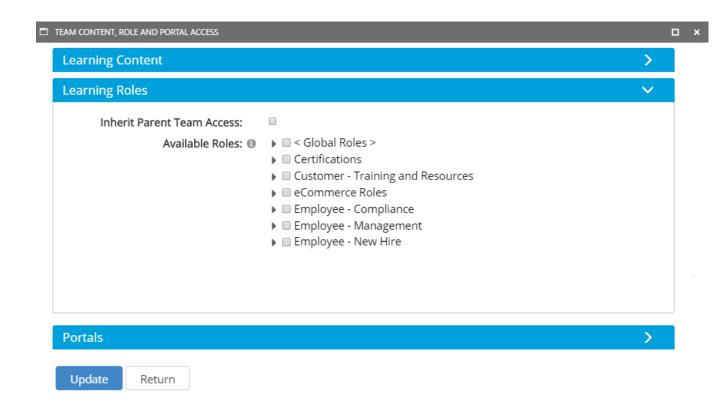
Learning Content

- 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.

TEAM CONTENT, ROLE AND PORTAL ACCESS			
Learning Content		\sim	
Inherit Parent Team Access: Available Folders: 🛛	 Select / Unselect First Aid Certification OSHA Driver Safety 		
	 Image: Second Control States Image: Image: Second Control States Image: Image: Second Control States Image: Se		
Learning Roles		>	
Portals		>	
Update Return			

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.

EAM CONTENT, ROLE AND PORTAL ACCESS		C
Learning Content		>
Learning Roles		>
Portals		~
Inherit Parent Team Access:	D	

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

Return

Update

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.

Pccord LMS			🛛 🗗 Mary Jones	Logout
Home My Courses Electives Res	ources Transcripts Community	ELearning Store	LMS Admin UI Patterns	
				8
Catalog Roles Teams Actions	Configuration		Active Team: All Members	•
Teams				Count
🖌 🎯 All Members	Team Details			
🧟 Learners				113
🧭 Content Admin	Team Content, Role and Portal Access			0
🧟 Learner Admin	Team Access Codes			0
Report Admin	Send Team Message			1
1 Team Admin	LMS Admin Types			4
	Add Child Team			
	Add Multiple Child Teams			

The **Team Access Codes** panel displays.

Initially, the Access Codes List will be empty and ready for you to create any needed Access Codes.

TEAM ACCESS CODES

All Members Team Access Codes

Access Codes are used to grant different kinds of LMS membership. It applies to the Team that created and owns the Code. Only an LMS Admin from the Owner Team can Edit or Delete this Code.

• ×

^

There are no Access Codes for this Team

Add New Access Code

Return

Add a New Access Code

Click Add New Access Code.

TEAM ACCESS CODES		×
All Members Team Access Codes		^
Access Codes are used to grant different kinds of LMS membership. It applies to the Team that created and owns the Code. Only an LMS Admin from the Owner Team can Edit or Delete this Code.	5	
There are no Access Codes for this Team		
Add New Access Code		_
Return		

The **Access Code** details panel will display.

v Access Code	
Access Code Name: * 🕕	
Access Code: * 🕕	
_	
Active: ()	
Description:	
	4
Owner: 🚯	All Members
Team Learner: 📵	●Add ○Drop ○Ignore
LMS Admin Types: 📵	. Ignore €
	○ 🗱 Drop
	O 📊 HR - Reports
	O 🧟 Learner Admin
	O 👤 Team Admin
Local Learning Roles: 📵	Global Roles >
	EMS Example Roles
	LMS Learning Roles
	New Learners
	Social Groups
	Translation Roles
Role Assignments: 🕕	Add if New 🗸
Notify Users: 📵	
Admin Notification Addresses: 🕕	
Version History: ()	
ization and Expiration	
date Return	

- 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.

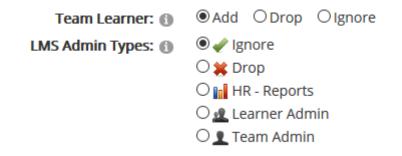
Access Code Name: * 🕕	Human Resources Code
Access Code: * 📵	HR
Active: 🕦	
Description: 🕦	Access Code to be utilized by HR

Owner: 1 All Members

• **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.

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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.

Local Learning Roles: 📵	🕨 🗹 < Global Roles >
	🕨 🔲 LMS Example Roles
	LMS Learning Roles
	New Learners
	🕨 🔲 Social Groups
	Translation Roles

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 Limit: 🕦					
Create Unique: 🕕					
Utilization Threshlold Notifications: 🕕	Level	Value	Туре		
	Final Notice		Total	○%	
	Second Notice		Total	0%	
	First Notice		Total	0%	
Start Date: 🕦					
End Date: 🕕					
Expiration Threshold Notifications: ()	Level	Value	Туре		
	Final Notice		Days	~	
	Second Notice		Days	~	
	First Notice		Days	~	

Accord LMS

- **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.

Utilization and Expiration						
Utilization Limit: 🚯	15					
Create Unique: 🕕						
Utilization Threshlold Notifications: 🕕	Level	Value	Туре			
	Final Notice	1	●Total	0%		
	Second Notice	3	●Total	0%		
	First Notice	5	●Total	0%		
Start Date: 🕦	3/20/2017					
End Date: 🕦	5/30/2017					
Expiration Threshold Notifications: 🕧	Level	Value	Туре			
	Final Notice	1	Days	\sim		
	Second Notice	3	Days	\sim		
	First Notice	4	Days	\sim		
Update Return						

The new Access Code will then be listed in the **Access Code List.**

TEAM ACCESS CODES			
All Members Team Access Codes			
Access Codes are used to grant different ki Admin from the Owner Team can Edit or D		Team that created and owns the Code. Only an LMS	
Name	Code	Owner	
Human Resources	HR	All Members	
Add New Access Code Return			

1 The Access Code List shows Access Codes for the Selected Team and All child teams. Access Codes can only be edited by the Team LMS Admin that created them.

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.

TEAM ACCESS CODES

All Members Team Access Codes

Name	Code	Owner
luman Resources	HR	All Members

• Click on the **Utilization and Expiration** heading to open this panel.

TEAM ACCESS CODE DETAILS	- ×
Owner: 🕕	All Members
Team Learner: 🕦	
LMS Admin Types: 📵	© ⋞ Ignore
	○ 🗱 Drop
	O 📊 HR - Reports
	O 🧟 Learner Admin
	O 👤 Team Admin
Local Learning Roles: 🕕	▶ 🗹 < Global Roles >
	IMS Example Roles
	IMS Learning Roles
	Im New Learners
	Social Groups
	Translation Roles
Role Assignments: 🕦	Add if New 🗸
Notify Users: 🕦	
Admin Notification Addresses: ()	demotest@sample.com
Version History: (1)	
Version History.	Created: IZMAdmin on 14 March 2017 at 6:29 PM
Utilization and Expiration	v
Update Return Delete	
	×

• 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 Limit: 🕕	15			
Utilized: 🕕	5 Reset			
Create Unique: ()	Download Code			`
indexing and ouncodorn of	Level	Value	Туре)
0	Final Notice	1	 Total 	0%
	Second Notice	3	Total	0%
	First Notice	5	Total	○%
Start Date: 🕕	3/20/2017			
End Date: 🕕	5/30/2017			
Expiration Threshold Notifications: 🕕	Level	Value	Туре	
	Final Notice	1	Days	\sim
	Second Notice	3	Days	\sim
	First Notice	4	Days	\sim

^

• Click **Return** to go back to the Team Access Code list.

Utilization Limit: 🚯	15							
Utilized: 🕕	5 Reset							
Create Unique: 🕕								
Tracking and Utilization: 🕕	Download Code	Download Code and Utilization List						
Utilization Threshlold Notifications: 🕕	Level	Value	Туре					
	Final Notice	1	Total	○%				
	Second Notice	3	Total	○%				
	First Notice	5	Total	0%				
Start Date: 🕦	3/20/2017							
End Date: 🚯	5/30/2017							
Expiration Threshold Notifications: ()	Level	Value	Туре					
	Final Notice	1	Days	~				
	Second Notice	3	Days	~				
	First Notice	4	Days	~				

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.

Home My Courses	Electives Reso	urces Transcript	Community	ECommerce	LMS Admin			
ſ						8		
	Teams Actions	Configuration			Active Team: All Members			
Teams						Count		
All Members						113		
Learners								
🧭 Content Admin						0		
🧟 Learner Admin						0		
Report Admin						1		
1 Team Admin						4		
Boston Office-Nori	th	Team Details						
		Team Content, Role an	d Portal Access					
		Team Access Codes						
		Send Team Message						
		LMS Admin Types						
		Add Child Team						
		Add Multiple Child Tea	ms					

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).

Accord LMS

- 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.

SEND TEAM MESSAGE	
Send Boston Office-North Team a l	Message 🗸 🗸
Learners: () Filter by Learning Roles: ()	Global Roles Gordflattons Gertifications Gustomer - Training and Resources eCommerce Roles Employee - Compliance Employee - Compliance Employee - Management Employee - New Hire
Filter by Role Status: LMS Admin: 🛛	enterprise roles Active To Start Past Due Content Admin Learner Admin Report Admin
Validation Test: Subject: *	Team Admin
Body: * Times New C C E Design HT	
Available Tokens:	View
Send Update Return	

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.

									ү Logout
	cco		VIJ						
Home	My Courses	Electives	Resources	Transcripts	Community	ELearning Store	LMS Admin	UI Patterns	
									•
Catalog	Roles	Teams	Actions Conf	iguration			Active Team: Al	Members	•
Teams									Count
🔺 🙆 All M	lembers								
🎎 Le	earners								113
🧭 C	ontent Admin								0
🙇 Le	earner Admin								0
🖬 R	eport Admin								1
1 Te	eam Admin								4
📕 🎯 B	oston Office-Nor	th		ר					
	Learners								0
ø	🖇 Content Admir	n							0
.9	Learner Admin	1							0
10	Report Admin								0

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 preconfigured 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.

Home My Courses Electives Resources Transcripts Community ELearning Store LMS Admin UI Pa	itterns						
Catalog Roles Teams Actions Configuration Active Team: All Memb	ers 🔹						
Teams	Count						
🖌 😳 All Members							
🧟 Learners	113						
🧭 Content Admin	0						
🧟 Learner Admin	0						
🔢 Report Admin	1						
👤 Team Admin	4						
🔺 🎯 Boston Office-North							
🧟 Learners	0						
🧭 Content Admin	0						
🧟 Learner Admin	0						
Report Admin	0						
LMS Admin Management	0						
LMS Admin Notifications							
Bulk LMS Admin Assignment							
Bulk LMS Admin Import							

The LMS ADMIN MANAGEMENT panel will display.

Initially it will contain zero Users.

Click Add New User.

eam Admin	Management					×
	Sear	ch:	l	Jsername	•	
		Sear	ch			
ABC	DEFGHIJ	K L M N O	PQRSTU	v w x y z a	ll Unauthorized	Authorized
	Username	Display Name	Address	Telephone	Created Date	Authorized
age 1 of 1 Fir	st Previous Next	Last				
	ser Merge Us	ers				
Add New U						

Return

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.

Return

	Sear	ch:			Us	ername	▼		
			Searc	h					
ABCD	EFGHIJ	KLM	ΝΟΙ	PQRS	τυv	w x y z	Z All U	nauthorized	Authorized
	Username	Display	Name	Address		Telephone	Cre	ated Date	Authorized
2 🗸 🗜 🖗	mary.jones@g mail.com	Mary Jor	ies					0/2020 1:22 PM	
age 1 of 1 Firs	st Previous Nex	t Last							
Add New Us	ser Merge U								

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.

	🍄 Logout
Home My Courses Electives Resources Transcripts Community ELearning Store	
Catalog Roles Teams Actions Configuration Active Team: All Members	8
Teams	Count
All Members	112
	113 0
💋 Content Admin	0
Learner Admin	1
📊 Report Admin	4
Ieam Admin Boston Office-North	4
Boston Onice-North	0
g Content Admin	0
Learner Admin	0
Report Admin	0
⊥ Team Admin LMS Admin Management	0
LMS Admin Notifications	
Bulk LMS Admin Assignment	
Bulk LMS Admin Import	

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.

IMS ADMIN NOTIFICATIONS ILE Attempts: None Conditions Satisfied: ILE Attempts: ILE Attempte: I



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.

Pccorc	LMS			🛛 🗗 Mary Jones	i 🍄 Logout
Home My Courses Elec	ctives Resources Transcrij	pts Community	ELearning Store	LMS Admin UI Patterns	5
Catalog Roles Team	s Actions Configuration			Active Team: All Members	•
Teams	_				Count
🔺 🎯 All Members					
🤽 Learners					113
🧭 Content Admin					0
🧟 Learner Admin					0
Report Admin					1
👤 Team Admin					4
4 🙆 Boston Office-North					
Learners					0
🧭 Content Admin					0
🧟 Learner Admin					0
🖬 Report Admin					0
👤 Team Admin	LMS Admin Management				0
	LMS Admin Notifications				
	Bulk LMS Admin Assignment				
	Bulk LMS Admin Import				

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.

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

Bulk Team Admin Assignment			
Users List: 🕕		hoose File	
	OUser Names:	eee	
Assignment: 🕦	●Add ODrop		
Notify Users: 🕦			
Assign Return			

^

• Click/Tap the **Assign** button to add or drop the LMS Admin permissions.

Users List:	OCSV File:	BulkAdminAssignment.csv	
	OUser Names:	000	
Assignment:) 🖲 Add ODrop		
Notify Users:	i) 🗹		

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



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.

	ary Jones 🍄 Logout
Home My Courses Electives Resources Transcripts Community ELearning Store LMS Admin U	Il Patterns
Catalog Roles Teams Actions Configuration Active Team: All Me	e mbers
Teams	Count
🖉 🌚 All Members	
🧟 Learners	113
💋 Content Admin	0
🧟 Learner Admin	0
Report Admin	1
L Team Admin	4
🔺 💿 Boston Office-North	
🔟 Learners	0
🧭 Content Admin	0
🧟 Learner Admin	0
📊 Report Admin	0
LMS Admin Management	0
LMS Admin Notifications	
Bulk LMS Admin Assignment Bulk LMS Admin Import	

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.

Accord LMS

- **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.

Bulk Team Admin Import		^
LMS Admin List: * 🕕	BulkLMSAdminImport.csv	
Access Codes: 📵	HR]
Notify Users: 📵		
Notify Portal Administrator: 🕕		
Notify BCC: 🚯	demo.test@sample.com	
Random Password: 🕕		
Require New Password: 🚯		
Import Return		

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**.

Confirm		
Are you sur LMS Admin	-	o Import the selected
Yes	No	

Accord LMS

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



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.

e

• 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.

Pccor					🔤 🗗 Mary J	ones 🍄 Logout
Home My Courses	Electives Resources	Transcripts	Community	ELearning Store	LMS Admin UI Par	tterns
Catalog Roles Te	ams Actions Configur	ation			Active Team: All Memb	ers 🔹
Teams						Count
All Members						114
🚅 Learners 🧭 Content Admin						0
Learner Admin						0
Report Admin						1
L Team Admin						4
Boston Office-North		_				
Learners	Learner Management					1
Ø Content Admin	Learner Notifications					0
🔔 Learner Admin	Bulk Learning Role Assignment					0
Report Admin	Bulk Team Assignment					0
L Team Admin	Bulk Learner Import					1
	Bulk Learner Import - FTP & Rep	ports				

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.

Accor					⊠ 0⁸ Mary	y Jones 🍄 Logout
Home My Courses	Electives Resources	Transcripts	Community	ELearning Store	LMS Admin UI	Patterns
Catalog Roles	ams Actions Config	uration		(Active Team: All Merr	Contraction Contraction Contraction
Teams						Count
All Members Learners						114
Content Admin						0
🧟 Learner Admin						0
📊 Report Admin						1
1 Team Admin						4
A 😡 Boston Office-North	Learner Management					
🔔 Learners 🧭 Content Admin	Learner Notifications					1
Learner Admin	Bulk Learning Role Assignme	ent				0
Report Admin	Bulk Team Assignment					0
L Team Admin	Bulk Learner Import					1
	Bulk Learner Import - FTP &	Reports				

The Learner Management panel will display.

All current Learners for this Team will be listed alphabetically here.

	Sear	ch:	U	sername	V	
		Searc	h			
ABCD	EFGHIJ	KLMNOF	P Q R S T U	v w x y z A	II Unauthorized	Authorized
	Username	Display Name	Address	Telephone	Created Date	Authorized
2 🗸 🛓 🖗	mary.jones@g mail.com	Mary Jones			4/10/2020 3:44:22 PM	¥
age 1 of 1 Firs	t Previous Nex	t Last				
Add New Us	er Merge U					

Return

There are various Learner management options you can perform from this panel, to include;

Create a New User Account

• Click Add New User.

	Search:		U	lsername	V	
		Searc	h			
ABCD	EFGHIJK	LMNOF	PQRSTU	v w x y z A	ll Unauthorized	Authorized
	Username D	isplay Name	Address	Telephone	Created Date	Authorized
) 🗸 🖬 🖗	mary.jones@g mail.com M	ary Jones	·	·	4/10/2020 3:44:22 PM	V
ge 1 of 1 Fir	st Previous Next l	.ast				

Return

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.

Add New User	
User Name: * 🛛	
First Name: * 0	
Last Name: * 0	
Display Name: * 🖲	
Email Address: * 0	
Authorize: 0	8
Notify: 0	
Optionally enter a password for this	user, or allow the system to generate a random password
Random Password @	
Password: 0	
Confirm Password: @	
Available Roles: ()	▶ III < Global Roles >
	ULMS Example Learning Roles UTranslation Roles
Manage Profile	
	· · · · · · · · · · · · · · · · · · ·
Basic	
Prefix: 0	
First Name: 0	
Middle Name: @	
Last Name: @	
Contact	
Cell/Mobile: 0	
Fac 0	
Telephone: @	
Company Name @	
Website: 0	
IM: 0	
Twitter @	
Skype ID @	
Linkedin @	
Facebook @	
Location Unit: 0	
Unit Ø	
Unit: 0 Street: 0	
Unit: 0 Street: 0 City: 0	autocomplete field
Unit: 0 Street: 0 City: 0 Region: 0	extocomplete field
Unit: 0 Street: 0 Region: 0 Country: 0 Postal Code: 0	
Unit: 0 Street: 0 Chy: 0 Region: 0 Country: 0 Postal Code: 0 Preferred Time Zone: 0	(UTC-12:00) International Date Line West
Unit: 0 Street: 0 Region: 0 Country: 0 Postal Code: 0	(UTC-12:00) International Date Line West Not Specifi
Unit: 0 Street: 0 Chy: 0 Region: 0 Country: 0 Postal Code: 0 Preferred Time Zone: 0	(UTC-12:00) International Date Line West

Edit a User Account

• Click the **pencil** icon next to the User you wish to edit.

	Search:			Usernan	ne	▼	
		Searc	h				
ABCD	EFGHIJKL	MNOF	QRST	u v w	XYZA	ll Unauthorized	Authorized
	Username Disp	ay Name	Address	Telep	hone	Created Date	Authorized
27 💶 🗈	mary.jones@g mail.com Mary	Jones				4/10/2020 3:44:22 PM	V
age 1 of 1 Firs	st Previous Next Las	t					

Return

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.

Manage User Credentials	Manage Rol	es for this User	Manage Password	Manage Profi	le
Edit User - mary.jones@	gmail.com	(ld: 172)			~
Use	er Name: 🕕	mary.jones@gm	nail.com		
First	Name: *	mary		±	
Last	Name: * 🕕	jones			
Display	Name: * 📵	Mary Jones			
Email Ac	ddress: * 🛈	mary.jones@gr	nail.com		
User	Portals: 🕕				
Update Delete					
Creat	ted Date: 🕕	4/10/2020 3:44:	22 PM		
Last Lo	gin Date: 🛈	4/10/2020 3:44:	22 PM		
Last Activ	vity Date: 📵	4/10/2020 3:44:	22 PM		
Last Password	Change:	4/10/2020 3:44:	22 PM		
Last Lock-o	out Date: 🕕	Never			
User I	s Online:	False			
Loc	ked Out: 🕕	False			
Au	thorized:	True			
Update Pa	assword: 🛈	False			
	Deleted: 🕕	False			
UnAuthorize User					

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.

	Sear	ch:	U	sername	•	
		Search		V W V V 7 A	II. Upper the size of	Authorizod
ABCD	E F G H I J	Display Name	Address	Telephone	Created Date	Authorized
27 1 1	mary.jones@g mail.com	Mary Jones		. elephone	4/10/2020 3:44:22 PM	
age 1 of 1 Firs	st Previous Nex	t Last				

Return

The page will refresh and display the **MEMBER DETAILS** panel.

• Click **Delete**.

Manage User Credentials Manage Ro	les for this User Manage Password	Manage Profi	le
Edit User - mary.jones@gmail.com	(ld: 172)		~
User Name: 🕕	mary.jones@gmail.com		
First Name: * 🕕	mary	±	
Last Name: * 🕕	jones		
Display Name: * 🕕	Mary Jones		
Email Address: * 🕕	mary.jones@gmail.com		
User Portals: 🕕	✓ TrainingSub		
Update Delete			
	4/10/2020 3:44:22 PM		
Last Login Date: 🕕	4/10/2020 3:44:22 PM		
Last Activity Date: 📵	4/10/2020 3:44:22 PM		
Last Password Change: 🖲	4/10/2020 3:44:22 PM		
Last Lock-out Date: 🕕	Never		
User Is Online: 🕕	False		
Locked Out: 🕕	False		
Authorized:	True		
Update Password:	False		
Deleted: ()	False		
UnAuthorize User			

The screen will refresh, now showing this User's information grayed out, representing it stands in a soft-delete status.

EARNER MANAGEMENT						
Learner Manageme	ent					~
	Search:			Username	•	
ARCDEE	GHIJKLI	Searc		I V W X X 7	All Unauthorized	Authorized
		y Name	Address	Telephone	Created Date	
rn × ∎ mary.je	mes@gmail.c Mary Jon	65			4/10/2020 3:44:22 PM	Z
Page 1 of 1 First Pre	vious 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.

earner Man	agement					\sim
	Sear	rch:	l	Jsername	•	
		Searc		V W X Y Z AI	I Unauthorized	Authorized
ABC					onductionized	Authorized
ABC	Username	Display Name	Address	Telephone	Created Date	Authorized
	_		-			
	Username mary.jones@gmail.c	Display Name Mary Jones	-		Created Date	Authorized

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.

earner Ma	inagement					N
	Sea	rch:		Username	V	
АВС	DEFGHIJ	Searc		J V W X Y Z AI	l Unauthorized	Authorized
	Username	Display Name	Address	Telephone	Created Date	Authorized
	mary.jones@gmail.c om	Mary Jones	1		4/10/2020 3:44:22 PM	V
ge 1 of 1 F	First Previous Next	Last				
	User Merge Us	ers				

Return

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.

			Sear	ch:					U	sername	5	•	
					S	earcl	h						
A B	C D	EFG	нīј	κL	MN	OF	Q	RST	U	v w x	ΥZ	All Unauthorized	Authorized
		Userna	me	Disp	lay Nar	ne	Addr	ress		Telepho	one	Created Date	Authorized
201	1	mary.jo mail.cor	_	Mary	Jones							4/10/2020 3:44:22 PM	V
age 1 of	1 Firs	t Previo	ous Nex	t Las	t								

Return

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 reactivation 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.

		Role: 🛈	BCLS Train	ner 🔻						
	Rei	newal Count: 💷	0							
	Act	ivation Date: 🕕	15 Apr 20	20 🖩 [14 Apr 2020 10:0	0 PM MDT]				
		Start Date: 🕕	15 Apr 20	15 Apr 2020 🗐 [14 Apr 2020 10:00 PM MDT]						
		Due Date: 🕕								
	Exp	iration Date:								
	Re-Act	ivation Date: 🕕								
			🗆 Send No	otification?						
			Add Ro	ole to User						
	Role	Activation Date	Start Date	Due Date	Expiration Date	Re-Activation Date	Renewal Count			
	Registered Users	10 Apr 2020	10 Apr 2020							
×	Admin Staff	10 Apr 2020	10 Apr 2020							
×	Open Sesame Plus	10 Apr 2020	10 Apr 2020							
	Warehouse	10 Apr 2020	10 Apr 2020				0			
×		10 Apr 2020	10 Apr 2020	2 Apr 2020	3 Apr 2020					

Modify Learner Status

To Modify Learner Status;

• Click the **Learners** icon next to the desired User.

	Sear	ch:	U	sername	•	
		Searc	h			
ABCD	EFGHIJ	K L M N O F	Q R S T U	v w x y z A	ll Unauthorized	Authorized
	Username	Display Name	Address	Telephone	Created Date	Authorized
2 V 💷 🗎	mary.jones@g mail.com	Mary Jones			4/10/2020 3:44:22 PM	×
age 1 of 1 Firs	t Previous Next	t Last				
Add New Us	or Morgo Li	ors				
Add New Us	er Merge Us	sers				

Accord LMS

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.

Team Member S	tatus	\sim
User Name:	mary.jones@gmail.com	
Learner:		
LMS Admin	0 🖉 None	
Туре:	0 💋 Content Admin	
	🛛 🧟 Learner Admin	
	🔍 📊 Report Admin	
	🖲 👤 Team Admin	
Learner's 🕕	All Members, Boston Offic	e-North
Teams:		

Add or Edit a User's Assigned LMS Admin Types

Return

Assign, edit or remove any LMS Admin Type permissions for any User on your Team.

• Click the **Admin** icon next to the desired user.

Update

	Sear			sername	V	
ABCD	EFGHIJ	Search		V W X Y Z A	ll Unauthorized	Authorized
	Username	Display Name	Address	Telephone	Created Date	Authorized
» 🛪 💶	mary.jones@g mail.com	Mary Jones			4/10/2020 3:44:22 PM	¥
age 1 of 1 Firs	st Previous Nex	t Last				
ige 1 of 1 Firs	st Previous Nex	t Last				

Return

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.

MEMBER STATUS DETAILS		
Team Member St	atus	\sim
User Name:	mary.jones@gmail.com	
Learner:	Ø	
LMS Admin Type:	 ⊘ None ⊘ Content Admin ∞ Learner Admin ∞ Report Admin ∞ Team Admin 	
Learner's 🕕 Teams:	All Members, Boston Office-N	lorth
Update Retu	rn	

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.

Paccor	d lms				Mary Jones 🍄 Logout
Home My Courses	Electives Resources Transcr	ipts Community	ELearning Store	LMS Admin	UI Patterns
Catalog Roles Te	ams Actions Configuration			Active Team: All	? Members
Teams					Count
🖌 🎯 All Members					
🤽 Learners					114
🧭 Content Admin					0
🧟 Learner Admin					0
📔 Report Admin					1
1 Team Admin					4
🖌 🎯 Boston Office-North		1			
🤽 Learners	Learner Management				1
🧭 Content Admin	Learner Notifications				0
🧟 Learner Admin	Bulk Learning Role Assignment				0
Report Admin	Bulk Team Assignment				0
L Team Admin	Bulk Learner Import				1
	Bulk Learner Import - FTP & Reports				

The Learner Management panel will display.

• Click on Merge Users.

	Search	1:	U	sername	T	
АВСД	EFGHIJK	Search		V W X Y Z A	II Unauthorized	Authorized
	_		Address	Telephone	Created Date	Authorized
2 🗸 🕯	mary.jones@g mail.com	Mary Jones			4/10/2020 3:44:22 PM	
age 1 of 1 Fir	st Previous Next	Last				

Return

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**.

Placord LMS

MERGE USERS		
Select and Merge Users		~
Merge the Source User account into	the Destination User account.	
Active Team: 🕕	All Members	
Source User: 0		
Destination User: 🕕		
Roles: 0	8	
Teams: 🕕		
Attempts: 0	2	
LMS Admin Types: 🕕	2	



Return

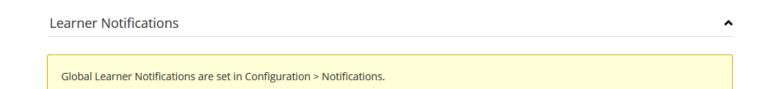
Learner Notifications

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.

Accor					Mary Jones 🍄 Logout
Home My Courses	Electives Resources Transcr	ipts Community	ELearning Store	LMS Admin	UI Patterns
Catalog Roles	eams Actions Configuration			Active Team: All	Members
Teams					Count
🚽 🎯 All Members					
🧟 Learners					114
🧭 Content Admin					0
🧟 Learner Admin					0
📔 Report Admin					1
👤 Team Admin					4
🔺 🎯 Boston Office-North		1			
🧟 Learners	Learner Management				1
🧭 Content Admin	Learner Notifications				0
🧟 Learner Admin	Bulk Learning Role Assignment				0
Report Admin	Bulk Team Assignment				0
L Team Admin	Bulk Learner Import Bulk Learner Import - FTP & Reports				1

To configure **Global Learner Notifications**, please refer to the **Notifications** section under the **Configuration** chapter.



Return

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.

Home	My Courses	Electives	Resour	rces Transcripts	Community	ELearning S	tore LMS Admin	UI Patterns
Cat	talog Roles	Teams	Actions	Configuration			Active Team:	All Members 🔹
Rol	les							
		Filter by Ro	le Group: 📵	<global roles=""></global>			•	
	Name	Rules	Count	Activation Date	Start Date	Due Date	Expiration Date	Re-Activation Date
2	Seasonal Staff	4	34	Immediate	Immediate	27 Dec 2019	27 Dec 2019	30 Days
2	Warehouse		20	Immediate	Immediate	180 Days	None	None
2	Open Sesame Plus		3	Immediate	Immediate	None	None	None
2	Administrators		2	Immediate	Immediate	2 Apr 2020	3 Apr 2020	None
2	Registered Users		114	Immediate	Immediate	None	None	None
2	Annual Certifications		10	Immediate	Immediate	None	None	None
A	dd New Group	Add New	Role	Bulk Learner Assignr	nent			

The **Bulk Learner Assignment** panel will display.

Select Learners	
Learning Roles: 🌒	 Roles Teams CSV File All Roles Global Roles Certifications Customer - Training and Resources Coustomer - Training and Resources Ecommerce Roles Employee - Compliance Employee - New Hire
Learning Roles	
Learning Roles to Assign: 🕕	 Global Roles > Certifications Customer - Training and Resources Commerce Roles Employee - Compliance Employee - Management Employee - New Hire enterprise roles
Access Codes: 🕦	
Notify Learners: 🚺	
Dates	v
Override learning role dates 🕕	
Submit Return	

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.

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- 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.

Accord LMS				⊠ 0 ¹	Mary Jones 🍄 Lo
Home My Courses Electives Resour	ces Transcripts	Community	ELearning Store	LMS Admin	UI Patterns
Catalog Roles Teams Actions	Configuration		(Active Team: A	? Members
Teams					Count
Germannen All Members Learners					114
Content Admin					0
Learner Admin					0
Report Admin					-
Team Admin					4
Soston Office-North					
Learner Manageme	nt				1
Content Admin Learner Notification	5				0
Learner Admin					0
Bulk Team Assignm					0
Bulk Learner Import					1
Bulk Learner Import	- FTP & Reports				

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.

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- 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.

BULK TEAM ASSIGNMENT	
Select Learners	
Learner Source: 🕕	●Team or Roles ○CSV File
All Team Members [All Members]: 🕕	
Learning Roles: 0	 Global Roles Certifications Customer - Training and Resources eCommerce Roles Employee - Compliance Employee - Management Employee - New Hire
Learners: 🕕	Show Search
Assign Teams	
Assignment: 🕕	⊛Add ⊙Drop
Notify Learners: 🕕	0
Submit Cancel	

Once the operation is complete an **'Assign Learner Membership Status'** message will display, showing the details of the **Bulk Team Assignment** just performed.

Paccord LMS

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 .

Accord				🖼 🗗 Mary Jones	🍄 Logout
Home My Courses	Electives Resources Transcr	ipts Community	ELearning Store	LMS Admin UI Patterns	5
Catalog Roles	ams Actions Configuration			Active Team: All Members	•
Teams					Count
🛃 🎯 All Members					
🧟 Learners					114
🧭 Content Admin					0
🧟 Learner Admin					0
📊 Report Admin					1
1 Team Admin					4
 Boston Office-North Learners Content Admin 	Learner Management Learner Notifications				1 0
🧟 Learner Admin	Bulk Learning Role Assignment				0
🔝 Report Admin	Bulk Team Assignment				0
1 Team Admin	Bulk Learner Import Bulk Learner Import - FTP & Reports				1

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;

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- **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.

<u>Details</u>

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.

Accord LMS

- **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.

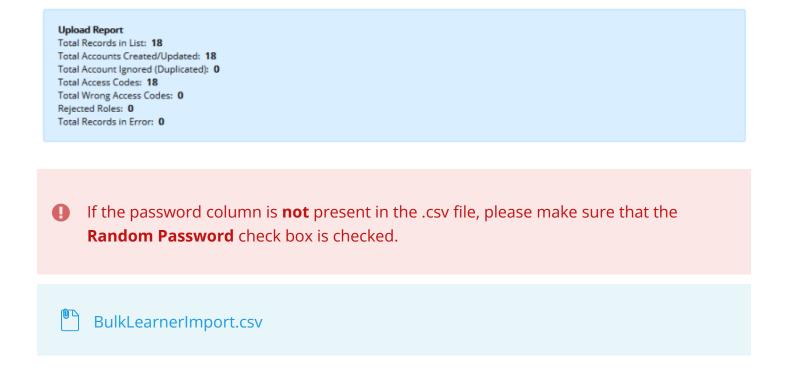
To save your settings as a new definition, go up to the Definitions section and;

• Click **Create** to save your definition.

pload Learners		~
Import new Learners into your Team. More Information		
Learner Import CSV File: ()		Select
Definitions		~
Create and Save Definitions for your I	mport settings.	
Selected Definition: @	< Create New Definition >	*
Definition Name: * 🛛		
Definition Description: 0		
Allow Automatic Import:	8	
	None Selected	•
Encryption:		
Automatic Import Notification:		
Automatic Import Notification: @ Create Details		
Automatic Import Notification: Create Details User Accounts:	Create Or Update	•
Automatic Import Notification: Create Details User Account: Role Update:	Create, Refresh, Ignore	
Automatic Import Notification: Create Details User Accounts: Role Updates: Drop Other Team Membership:	Create, Refresh, Ignore	•
Automatic Import Notification: Create Details User Account: Role Update:	Create, Refresh, Ignore Generation of the second s	•
Automatic Import Notification: Create Details User Accounts: Role Updates: Drop Other Team Membership:	Create, Refresh, Ignore Generation of the second s	•
Automatic Import Notification: Create Details User Accounts: Role Updates: Drop Other Team Membership:	Create, Refresh, Ignore Create, Refresh, Ignore CcGlobal Roles > Cctrifications Customer - Training and Resources Ccommerce Roles D = Ernployee - Compliance	•
Automatic Import Notification: Create Details User Accounts: Role Updates: Drop Other Team Membership:	Create, Refresh, Ignore Create, Refresh, Ignore Cotal Roles > Cotal Control Control Roles Cotal Control Control Resources Comployee - Compliance Employee - Management	•
Automatic Import Notification: Create Details User Accounts: Role Updates: Drop Other Team Membership:	Create, Refresh, Ignore Create, Refresh, Ignore CcGlobal Roles > Cctrifications Customer - Training and Resources Ccommerce Roles D = Ernployee - Compliance	•
Automatic Import Notification: Create Details User Accounts: Role Updates: Drop Other Team Membership:	Create, Refresh, Ignore Create, Refresh, Ignore Content of the set of the s	•
Automatic Import Notification: @ Create Details User Accounts: @ Role Updates: @ Drop Other Team Membrashes: @ Learning Roles to Assign: @	Create, Refresh, Ignore Create, Refresh, Ignore Content of the set of the s	•
Automatic Import Notification: Create Details User Accounts: Bole Updates: Drop Other Team Membership: Learning Roles to Assign: Access Codes: Notify Learners: Notify Learners: Notify Learners:	Create, Refresh, Ignore Create, Refresh, Ignore Create, Robert Schler,	•
Automatic Import Notification:	Create, Refresh, Ignore Create, Refresh, Ignore Could Roles > Could Roles > Counter-Training and Resources Counter-Training and Resources Counter-Trai	•
Automatic Import Notification:	Create, Refresh, Ignore	•
Automatic Import Notification: @ Create Details User Accounts: @ Role Updates: @ Drop Other Team Membership: @ Learning Roles to Assign: @ Access Codes: @ Notify Learners: @ Notify Lea	Create, Refresh, Ignore	•

Q 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.



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.

Piccor	d lms			⊠ 0 ⁸	Mary Jones 🕆 Logout
Home My Courses	Electives Resources Transcr	ipts Community	ELearning Store	LMS Admin	UI Patterns
Catalog Roles	ams Actions Configuration		(Active Team: All (? Members
Teams					Count
 All Members Learners 					114
🧭 Content Admin					0
🧟 Learner Admin					0
Report Admin					1
👤 Team Admin					4
Boston Office-North Learners	Learner Management				1
🧭 Content Admin	Bulk Learning Role Assignment				0
🧟 Learner Admin	Bulk Team Assignment				0
Report Admin	Bulk Learner Import				0
👤 Team Admin	Bulk Learner Import - FTP & Reports				1

- 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.

8 8	ссо	rd	.MS				🜌 🛛 LMS Administrator 🍄 Logout
Home	My Courses	Electives	Resourc	es Transcript	Community	ECommerce	LMS Admin
Catalog	Roles	Teams	Actions	Configuration			Active Team: All Members
Configu	uration						
0	General Option	ıs					
	Notifications						
	Folder Types						
ø	Learning Elem	ent Formats					
1	Status Types						
	Education Activ	vities					
\gg	ILT Resources						
-	Role Based Re	direction					
	Import Data						
P	Enhanced Feat	ture Status					
*	Integration						
<u>a</u>	License Key an	d Details					

 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.

8 8	ссо	rd	.MS				🕿 🛛 LMS Administrator 🍄 Logout
Home	My Courses	Electives	Reso	urces Transcri	pt Communi	ty ECommerce	LMS Admin
Catalog	Roles	Teams	Actions	Configuration			Active Team: All Members
Configu	iration						
Ŷ	General Option	ns					
	Notifications						
	Folder Types						
ø	Learning Elem	ent Formats					
~	Status Types						
	Education Acti	vities					
st	ILT Resources						
-	Role Based Re	direction					
	Import Data						
P	Enhanced Feat	ture Status					
*	Integration						
a de la companya de l	License Key ar	nd Details					

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.

Accord LMS

• **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; <u>Display or Filter Sessions by</u> <u>Specific Instructors</u>

- 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: 🕕	0	
PDF Font File Name: 🚯	E]
SCORM Student Id: 🕦	O Userld 🖲 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.

Default Settings		\checkmark
Report > Filters > Advanced Options		
Attempts: 🕦	Last v	
My Team > Learning Roles > Learning Role Management > Role Details		
LE Tracking Options: 🕦	Track All Attempts until Completed]
Before Start Date Options: 🚯	LE are not allowed to Launch	
After Due Date Options: 🕚	LE are allowed to launch with Tracking	

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.

Folder Attempt Processing	\sim	
Batch Size: 🚯	1000	
Period: 🕚	2 minutes	

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.

Virtual ILT		\sim
VILT Launch Preview: 🕚	10 min.	
Force Open New Window For Mobile: 🜒		

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.

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; <u>http://www.adobe.com/</u> support/downloads/detail.jsp?ftpID=4025

Accord LMS

- To index MS Office files, the system must have MS office filter packs installed (not required for doc,docx files) <u>https://www.microsoft.com/en-us/download/</u> <u>details.aspx?id=17062</u>
- 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				
Minimum Word Length: * 🕕	3			
Maximum Word Length: * 🕕	255			
Maximum Crawl Depth (onsite): * 🕕	3			
Maximum Crawl Depth (offsite): * 🕕	0			
File Types to index: * 🕚	pdf,doc,docx,dot,rtf,xls,xlsx,xlt,ppt,pptx,txt,htm,html			
File Type Portal Alias: 🚯	alpha.accordIms.com			
Search Index Path: 🕚	D:\HTTP\Development\alpha.accordlms.com\Gv2lijuF80bA\App_Data\LMSSearch			
Index Title: 🚯				
Index Tags: 🚯				
Index Description: 🕚				
Index Body: 🕕				
Exact Match: 🚯				
	Get More Information			
Compacting of Index- reclaims space from deleted items in the Index Store. Compacting 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 there are just few items deleted, nothing will change. Re-Indexing- deletes existing content from the Index Store and then re-indexes everything.				
Notes:				
- Compacting or Re-Indexing should be done during non-peak hours as the process can be CPU intensive.				
- Both Compacting and Re-Indexing are done by the	'Learning Elements Search Crawler' scheduled job.			
Compact Index Rebuild Index				

Search	× .			
Minimum Word Length: * 🕕	3			
Maximum Word Length: * 🕕	255			
Maximum Crawl Depth (onsite): * 🕕	3			
Maximum Crawl Depth (offsite): * 🕕	0			
File Types to index: * 🚯	pdf,doc,docx,dot,rtf,xls,xlsx,xlt,ppt,pptx,txt,htm,html			
File Type Portal Alias: 🕕	alpha.accordims.com			
Search Index Path: 🕕	D:\HTTP\Development\alpha.accordIms.com\Gv2lijuF80bA\App_Data\LMSSearch			
Index Title: 🕕	8			
Index Tags: 🚯	8			
Index Description: 🕕	8			
Index Body: 🚯	8			
	Get More Information			
Compacting of Index- reclaims space from deleted items in the Index Store. Compacting 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 there are just few items deleted, nothing will change. Re-Indexing- deletes existing content from the Index Store and then re-indexes everything.				
Notes:				
- Compacting or Re-Indexing should be done during non-peak hours as the process can be CPU intensive.				
- Both Compacting and Re-Indexing are done by the 'Learning Elements Search Crawler' scheduled job.				
Compact Index Rebuild Index				

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.

Accord LM5

Catalog Roles Teams Actions Configuration	Active Team: All Members •
Catalog	
Copy To * Move To * Remove / Delete	First Quiz Q
My Catalog (5)	
LMS Learner Training (3)	
🕦 LMS - Definition of Term 🦎	
🥖 LMS Learner Quiz 陀	
Certificate of Completion	
📕 🗀 LMS Admin Training (1)	
🥖 LMS Admin Quiz	
Accord Storefront Training (1)	

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.

Catalog Roles Teams Actions Configuration	Active Team: All Members •
Catalog	
Copy To Move To Remove / Delete My Catalog (5) Curve LMS Learner Training (3) LMS - Definition of Term	Q* Q
LMS - Definition of refinitions	
Certificate of Completion	
🖌 🚞 LMS Admin Training (1)	
🖉 LMS Admin Quiz	
Accord Storefront Training (1)	

Phrases can also be specified using **double quoted text**. Quoted and non-quoted terms can be used in the same search.

Accord LMS

Catalog Roles Teams Actions Configuration	Active Team: All Members •
Catalog	"Definition of Term"
Copy To * Move To * Remove / Delete	
 My Catalog (5) European Environment (1) European Environment (1) 	
🕕 LMS - Definition of Term 🎉	
🥖 LMS Learner Quiz 🎌	
Certificate of Completion Network	
🖌 🚞 LMS Admin Training (1)	
🖉 LMS Admin Quiz	
Accord Storefront Training (1)	

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.

Enrollment Log	\sim
Enable Enrollment Logs: 🜖 Days to keep 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.

PACCORDING

Diagnostic Trace		\sim
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		\sim
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.

P		rd	LMS				🛛 🛛 LMS Administrator 🍄 Logout
Home	My Courses	Elective	s Resou	irces Transcrij	community	ECommerce	LMS Admin
Catalog	g Roles	Teams	Actions	Configuration)		Active Team: All Members
Config	uration						
Ŷ	General Optio	ns					
	Notifications						
	Folder Types						
ø	Learning Elem	ent Formats					
1	Status Types						
	Education Acti	vities					
${}$	ILT Resources						
-	Role Based Re	direction					
	Import Data						
P	Enhanced Fea	ture Status					
*	Integration						
a de la constante de la consta	License Key ar	nd Details					

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.

General Settings		^
"From" Email Address: 🗐	demo.test@accordlms.com	
SMTP Server and Port: 🗐	localhost	
Enable LMS Email: 🗊		
Email Batch Period: 🕕	10 minutes	
Email Batch Quantity: 🗐	100	
Portal Alias: 🕕	setup.accordIms.com ~	

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.

Learner Notifications		^
LE Enrollment: 🕕		
Session Registration: 1		
LE Attempts: 🕕	All	
Conditions Satisfied: (1)		
Learner Comments: 🗐		

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.**

8 P		rd	.MS				🛛 🛛 LMS Administrator 🍄 Logout
Home	My Courses	Electives		Transcript	Community	ECommerce	LMS Admin
Catalog	g Roles	Teams	Actions	onfiguration			Active Team: All Members
Config	uration						
0	General Optio	ns					
	Notifications						
	Folder Types						
ø	Learning Elem	ent Formats					
1	Status Types						
	Education Acti	vities					
${}$	ILT Resources						
-	Role Based Re	direction					
	Import Data						
P	Enhanced Fea	ture Status					
*	Integration						
× P	License Key ar	nd Details					

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.

Accord LMS

- **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.

Fol	der Ty	/pes	Active Team:	All Members 🔹
Fold	er Typ	e List		
	Icon	Name		
2	(III)	Chapter		
	20	Collection		
2	=	Course		
2		Folder		
2	盦	Learning Path		
Add	new Fol	der Type		

Editing a Folder Type

All of the pre-configured Folder Types can be edited.

• Click on the pencil icon.

Fol	der Ty	rpes		Active Team:	All Members	•
Fold	er Typ	e List				^
	lcon	Name				
2	ω	Chapter				
	20	Collection				
2	=	Course				
		Folder				
	金	Learning Path				
Add	new Fol	ler Type				

The Folder Type Details window displays.

- Perform the necessary updates.
- Click **Update** to save changes.

Folder Type Details

Folder Type Name: * 🗊	Learning Path
Icon Small: * 🖲	LearningPath-16x16.png
Icon Medium: * 🕕	LearningPath-24x24.png
Icon Large: * 🗊	LearningPath-48x48.png
Icon X-Large: * 🗊	LearningPath-72x72.png
Learner Presentation: 🕕	Orill Down O Expanded
	Hide Folder from Learner UI
Scoring Process: 🕕	Roll Up O Pass Through
Child Types: 🕕	 □ Chapter ☑ Collection ☑ Course □ Folder □ Learning Path □ Learning Element

Add new Folder Type

• Click Add new Folder Type.

Fold	ler Ty	/pes	Active Team: All Members
Folde	er Type	e List	^
	Icon	Name	
Ø	Ŵ	Chapter	
2	20	Collection	
2	=	Course	
2		Folder	
2	金	Learning Path	

- 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

Icon Small: * ①FlatFolder-16x16.pngIcon Medium: * ①FlatFolder-24x24.pngIcon Large: * ①FlatFolder-32x32.pngIcon X-Large: * ①FlatFolder-48x48.pngLearner Presentation: ①O Drill Down O ExpandedHide Folder from Learner UIScoring Process: ①Roll Up @ Pass ThroughChild Types: ①ChapterGoldertionCourseFolderFolderLearning PathLearning Element	Folder Type Name: * 🕕	Assignments
Icon Medium: * • FlatFolder-24x24.prig Icon Large: * • FlatFolder-32x32.png • Icon X-Large: * • FlatFolder-48x48.png • Icon X-Large: * • Drill Down • Expanded Hide Folder from Learner UI • Scoring Process: • • Roll Up • Pass Through • Child Types: • • Collection • Course • Folder • Learning Path •	Icon Small: * 🕕	FlatFolder-16x16.png -
Icon X-Large: * I FlatFolder-48x48.png Learner Presentation: I Image: Process: I Hide Folder from Learner UI Scoring Process: I Roll Up Image: Pass Through Child Types: I Chapter Collection Course Folder Learning Path	Icon Medium: * 🕕	FlatFolder-24x24.png
Learner Presentation: Drill Down Expanded Hide Folder from Learner UI Scoring Process: Roll Up Pass Through Child Types: Ch	lcon Large: * 🕕	FlatFolder-32x32.png
 □ Hide Folder from Learner UI Scoring Process: ①	Icon X-Large: * 🕕	FlatFolder-48x48.png
Scoring Process: Child Types:	Learner Presentation: 🕕	O Expanded
Child Types: Child Types: Chil		□ Hide Folder from Learner UI
Collection Course Folder Learning Path	Scoring Process:	○ Roll Up
Course Folder Learning Path	Child Types: 🕕	Chapter
Folder Learning Path		Collection
Learning Path		Course
		Folder
Learning Element		Learning Path
		Learning Element

Delete a Folder Type

• Click the **pencil icon** next to the Folder Type you want to delete.

Fold	ler Ty	rpes	Active Team: All Members
olde	er Typ	e List	
	lcon	Name	
	-	Assignments	
	Φ	Chapter	
ø	20	Collection	
2	=	Course	
ø		Folder	
2	金	Learning Path	

Return

In the Folder Type Details window:

• Click **Delete**.

older-16x16.png
older-32x32.png
older-48x48.png
ll Down 🔿 Expanded
le Folder from Learner UI
ll Up 💿 Pass Through
apter
llection
urse
der
arning Path
arning Element

• Click **Yes** to confirm action.

Confirm

Are you sure you want to Delete this item?



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.

P		rd	_MS					🕿 🛛 LMS Administrator 🍄 Logout
Home	My Courses	Elective	s Reso	urces	Transcript	Community	ECommerce	LMS Admin
Catalo	g Roles	Teams	Actions	Configu	ration			Active Team: All Members
Config	uration							
0	General Optio	ns						
	Notifications							
	Folder Types							
Ø	Learning Elem	ent Formats						
1	Status Types							
	Education Acti	vities						
×	ILT Resources							
-	Role Based Re	direction						
	Import Data							
P	Enhanced Fea	ture Status						
*	Integration							
2	License Key ar	nd Details						

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.

ear	rning Element Formats		Active Team: All Members
fau	ult		
on	LE Type	Format	
0	SCORM Presentation	Presentation - No Resume - Popup Window - 950x650	Ŧ
/	SCORM Quiz	Quiz - Modal Window - 950x650	Ŧ
/	Assessment	Assessment - Modal Window - 950x650	Ŧ
ł	Survey	Survey - Modal Window - 950x650	¥
L	Instructor Led Training	Instructor Led Training - Modal Window - 950x650	Ŧ
I	Certificate	Certificate - Modal Window - 950x650	Ŧ
D	Rich Text	Information - Modal Window - 950x650	Ŧ
ŧ	Microsoft Asset	Word - Current Window	¥
	Google Asset	Google Doc - Modal Window - 950x650	Ŧ
	File	File - Current Window - Download	¥
9	Link	Link - Modal Window - 950x650	¥
ĸ	Module	Resources - Modal Window - 950x650	*
oda OR			
ses	ssment and Survey		
diti	ional		
Retur			

SCORM: Learning Element Formats associated with SCORM Content Objects.

	Icon	Name	Details
2	0	Presentation	No Resume - Popup Window - 950x650
8	0	Presentation	No Resume - Modal Window - 950x650
8	ø	Presentation / Quiz	Modal Window - 950x650
8	ø	Presentation / Quiz	Only Success - No Resume - Popup Window - 950x650
2	/	Quiz	Modal Window - 950x650
2	/	Quiz	No Resume - Modal Window - 950x650

Assessment and Survey: Learning Elements Formats associated exclusively with Surveys and Assessment

	Icon	Name	Details
9	1	Assessment	Modal Window - 950x650
2		Survey	Modal Window - 950x650

Additional: Learning Element Types associated with the non-SCORM content, including (but not limited to) URLs, files, modules, Text/HMTL, etc.

	Icon	Name	Details
	Ø	Appointment	Modal Window - 950x650
		Audio	Modal Window - 950x650
		Certificate	Modal Window - 950x650
		Certificate PDF	Popup Window - 950x650
		Documentation	Modal Window - 950x650
	6	Excel	Current Window
		File	Current Window - Download
	Z	Flash	Modal Window - 950x650
		Forum	Current Window
		Google Doc	Modal Window - 950x650
		Google Forms	Modal Window - 950x650
		Google Sheet	Modal Window - 950x650
	8	Google Slides	Modal Window - 950x650
	۲	GoToMeeting	Modal Window - 950x650
	۲	GoToTraining	Modal Window - 950x650
	۲	GoToWebinar	Modal Window - 950x650
	2	Group	Modal Window - 950x650
		Image	Current Window - Download
1	0	Information	Modal Window - 950x650
	1	Instructor Led Training	Modal Window - 950x650
	۲	Link	Modal Window - 950x650
	*	PDF	Modal Window - 950x650
	¢1	PowerPoint	Current Window
	8	Resource	Modal Window - 950x650
	\mathbf{x}	Resources	Modal Window - 950x650
	t	Upload	Modal Window - 800x600
	-	URL	Modal Window - 950x650
		Video	Modal Window - 950x650
		Video	Modal Window - 1280x720
		Video - YouTube	Modal Window - 970x550
	0	WebEx	Modal Window - 950x650
	۲	Webinar	Modal Window - 950x650
	4	Word	Current Window
	-	Zip	Current Window - Download

Add New SCORM Format

Click Add New SCORM Format.

	lcon	Name	Details
5	0	Presentation	No Resume - Popup Window - 950x650
	0	Presentation	No Resume - Modal Window - 950x650
1	ø	Presentation / Quiz	Modal Window - 950x650
	ø	Presentation / Quiz	Only Success - No Resume - Popup Window - 950x650
)	/	Quiz	Modal Window - 950x650
	/	Quiz	No Resume - Modal Window - 950x650

A detail page displays with options for creating a new Learning Element Type.

xyke	ค	C	CC	or	d	

SCORM Formats				Active Team: All Members	•
General Settings					^
	Format Name: * () Icon Small: * () Icon Medium: * () Icon Large: * () Icon X-Large: * () Width: * () Height: * ()	 < Select an Icon > 950 650 	* * *		
Advanced Settings					~
Update Cancel					

• Format Name: Type a title for the Learning Element Format.

SCORM Formats			Active Team: All Members
General Settings			
	Format Name: * 🗐	Custom	
	Icon Small: * 🗊	< Select an Icon >	
	Icon Medium: * 📵	< Select an Icon >	
	lcon Large: * 📵	< Select an Icon >	
	Icon X-Large: * 🕕	< Select an Icon >	
	Width: * 🕕	950	
	Height: * 🗊	650	
Advanced Settings			
Update Cancel			

• **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.

SCORM Formats			Active Team:	All Members	•
General Settings					^
	Format Name: * 🗊	Custom			
	Icon Small: * (1) Icon Medium: * (1) Icon Large: * (1) Icon X-Large: * (1)	Calendar-16x16.pngCalendar-24x24.pngCalendar-32x32.pngCalendar-48x48.png			
	Width: * 🗊 Height: * 🗊	950			
Advanced Settings					•
Update Cancel					

• **Dimensions:** Enter a **Width** and **Height** for the Launch Window used to present the Learning Element.

SCORM Formats			Active Team: All Members 🔹
General Settings			~
	Format Name: * Icon Small: * Icon Medium: * Icon Large: * Icon X Large: * Width: * Height: *	Custom Calendar-16x16.png • Calendar-24x24.png • Calendar-32x32.png • Calendar-48x48.png • 950 650	
Advanced Settings			~
Update Cancel			

• Advanced Settings: Click the down arrow to expand this section.

xte	ค	C	C	O	(6	
		\sim	\sim	-		-	

SCORM Formats		Active Team:	All Members 👻
General Settings			^
Format Name Icon Smai Icon Medium Icon Large	I: * 1 Calendar-16x16.png • n: * 1 Calendar-24x24.png • e: * 1 Calendar-32x32.png •		
	e: ★ ① Calendar-48x48.png ▼ h: ★ ① 950 t: ★ ① 650		_
Advanced Settings			~

• Launch Window: Select the type of window (Pop-up or Modal) that the Learning Element will be launched in.

Launch Window: 🕚	◎ Popup ⑧ Modal	
Force Additional Popup for Mobile: 🚳		
Status Options: 🕕	Success Over Completion (default)	
Duration Reporting: 💷	● SCO ○ LMS	
Scorable (required for Quizzes): 💷	2	
No Resume: 🕕		
Combine Legacy SCO settings: 🕕	Captivate Quiz (5.x)	
	Articulate ('09)	
te Cancel		

- (1) A **Pop-up** window is a secondary browser window in which the Learning Element is launched on top of the original LMS window.
- 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.

Accord LMS

• Force additional Popup for Mobile: Provides an additional pop-up window for all mobile devices. This will avoid IFrame usage and improve presentation.

Launch Window: 📵	O Popup 🖲 Modal
Force Additional Popup for Mobile: 🕕	
Status Options: 🗐	Success Over Completion (default)
Duration Reporting: 🕕	● SCO ◎ LMS
Scorable (required for Quizzes): 🕕	2
No Resume: 🕕	
Combine Legacy SCO settings: 🕕	Captivate Quiz (5.x)
	Articulate ('09)

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).

Launch Window: 🕕	Popup Modal
Force Additional Popup for Mobile: 🕕	2
Status Options: 🕕	Success Over Completion (default)
Duration Reporting:	Success Over Completion (default) Completion Only Completion Only Completion Column
Scorable (required for Quizzes): 🕕	Success Only
No Resume: 🕕	
Combine Legacy SCO settings: 🕕	Captivate Quiz (5.x)
	Articulate ('09)

• **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.

Launch Window: 🕕	
Force Additional Popup for Mobile: 🕕 Status Options: 🕕	
Duration Reporting:	
Scorable (required for Quizzes): 📵	×.
No Resume: 🕕	
Combine Legacy SCO settings: 🕕	Captivate Quiz (5.x)
	Articulate ('09)

~

• **Scorable (required for Quizzes):** Select if this LE Type will be scorable. Those scorable LE can contribute to the Folder and Course scores.

Advanced Settings	^
Launch Window: 🕕 Force Additional Popup for Mobile: 🗐	⊖ Popup ⊛ Modal ✔
Status Options: 📵	Success Over Completion (default)
Duration Reporting: 🕕	● SCO ◎ LMS
Scorable (required for Quizzes): 📵	
No Resume: 🕕	
Combine Legacy SCO settings: 📵	Captivate Quiz (5.x)
	Articulate ('09)
Update Cancel	

• **No Resume:** Select this option to disable all Learning Elements (even those with this functionality built in) from Resuming.

Advanced Settings	^
Launch Window: 🗐	Popup Modal X
Force Additional Popup for Mobile: 🗐 Status Options: 🗐	Success Over Completion (default)
Duration Reporting: 📵	● SCO ◎ LMS
Scorable (required for Quizzes): No Resume:	
Combine Legacy SCO settings: 🗐	Captivate Quiz (5.x) Articulate ('09)
Update Cancel	

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).

Status options: •	Iccess Over Completion (default)
Duration Reporting: 🕚 🤎 Scorable (required for Quizzes): 🕲 🦉	SCO 🔍 LMS
combine regacy sco settings.	Captivate Quiz (5.x) Articulate ('09)

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.

Launch Window: 🗐 Force Additional Popup for Mobile: 🗐	○ Popup ● Modal	
Status Options: 🕕	Success Over Completion (default)	*
Duration Reporting:	⊛ SCO ◎ LMS	
Scorable (required for Quizzes): 📵		
No Resume: 🗐		
Combine Legacy SCO settings: 🗐	Captivate Quiz (5.x)	
	Articulate ('09)	

Add New Assessment or Survey Format

- Expand the Assessment and Survey section;
- Click Add New Assessment or Survey Format.

Asses	ssmen	t and Survey	
	lcon	Name	Details
	1	Assessment	Modal Window - 950x650
	1	Survey	Modal Window - 950x650
Add New Assessment or Survey Format			

^

Format Name: Type the title of the new Assessment or Survey Format.

Assessment and Survey Formats		Active Team: All Members •
General Settings		^
Format Name: * () Icon Small: * () Icon Medium: * () Icon Large: * () Icon X-Large: * () Width: * () Height: * ()	Satisfaction Survey < Select an Icon > <	
Advanced Settings		~
Update Cancel		

Update

Cancel

• **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.

Assessment and Survey Formats			All Members	,
General Settings				^
Format Name: * 🗊	Satisfaction Survey			
Icon Small: * 🕕	Catalog-16x16.png			
Icon Medium: * 🗐	Catalog-24x24.png			
Icon Large: * 🕕	Catalog-32x32.png			
Icon X-Large: * 🕕	Catalog-48x48.png			
Width: * 💷	950			
Height: * 🕕	650			
Advanced Settings				~

• **Dimensions:** Enter a **Width** and **Height** for the Launch Window used to present the Learning Element.

Assessment and Survey Formats			Active Team: All Members	
General Settings				
	Format Name: * ① Icon Small: * ① Icon Medium: * ① Icon Large: * ① Vidth: * ① Height: * ①	Satisfaction Survey Catalog-16x16.png Catalog-24x24.png Catalog-32x32.png Catalog-48x48.png 950 650	• • •	
Advanced Settings				
Update Cancel				

• Advanced Settings: Click the down arrow to expand this section.

Assessment and Survey Formats			Active Team	All Members	•	
General Settings				^		
	Format Name: * (1) Icon Small: * (1) Icon Medium: * (1) Icon Large: * (1) Icon X-Large: * (1) Width: * (1)	Satisfaction Survey Catalog-16x16.png Catalog-24x24.png Catalog-32x32.png Catalog-48x48.png 950	• • •			
Advanced Settings	Height: * 🕕	650				·

• Launch Window: Select the type of window (Pop-up or Modal) that the Learning Element will be launched in.

Advanced Settings				^
	Launch Window: 🕚	Popup Modal		
	Status Options: 🕕	Success Over Completion (d	efault)	•
Update Cancel				

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).

Advanced Settings			
	Launch Window:	Popup Modal Success Over Completion (default) Success Over Completion (default)	•
Update Cancel		Completion Only Success Only	

• Click **Update** to create your New Learning Element Type.

Launch Window: 🕕	Popup Modal	
Status Options: 🕕	Success Over Completion (default)	•

^

Add new Additional Format

- **Expand** the Additional section;
- Click Add new Additional Format.

	Icon	Name	Details
8	0	Appointment	Modal Window - 950x650
8		Audio	Modal Window - 950x650
8		Certificate	Modal Window - 950x650
8		Certificate PDF	Popup Window - 950x650
8		Documentation	Modal Window - 950x650
8	6	Excel	Current Window
8		File	Current Window - Download
8	1	Flash	Modal Window - 950x650
2		Forum	Current Window
8		Google Doc	Modal Window - 950x650
8		Google Forms	Modal Window - 950x650
0		Google Sheet	Modal Window - 950x650
8	8	Google Slides	Modal Window - 950x650
0	۲	GoToMeeting	Modal Window - 950x650
8	۲	GoToTraining	Modal Window - 950x650
8	۲	GoToWebinar	Modal Window - 950x650
9	4	Group	Modal Window - 950x650
8		Image	Current Window - Download
9	0	Information	Modal Window - 950x650
8	1	Instructor Led Training	Modal Window - 950x650
9	1	Link	Modal Window - 950x650
8	1	PDF	Modal Window - 950x650
9	0	PowerPoint	Current Window
8	\mathbf{x}	Resource	Modal Window - 950x650
9	\mathbf{x}	Resources	Modal Window - 950x650
8	t	Upload	Modal Window - 800x600
ŋ	-	URL	Modal Window - 950x650
8		Video	Modal Window - 950x650
ŋ		Video	Modal Window - 1280x720
8		Video - YouTube	Modal Window - 970x550
h	۲	WebEx	Modal Window - 950x650
8		Webinar	Modal Window - 950x650
8		Word	Current Window
	-	Zip	Current Window - Download

• Format Name: Type a title for the Learning Element Format.

Additional Formats			Active Tean	m: All Members	•
General Settings					^
	Format Name: * 🗊	Video - Vimeo			
	Icon Small: * 📵	< Select an Icon >			
	lcon Medium: * 📵	< Select an Icon >			
	Icon Large: * 📵	< Select an Icon >			
	Icon X-Large: * 🕕	< Select an Icon >			
	Width: * 🗐	950			
	Height: * 🗊	650			
Advanced Settings					~
Update Cancel					

• **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.

Additional Formats				Active Team:	All Members	•
General Settings						^
	Format Name: * 📵	Video - Vimeo				
	Icon Small: * 🛈	Video-16x16.png	-			
	lcon Medium: * 🗐	Video-24x24.png	•			
	Icon Large: * 📵	Video-32x32.png	•			
	Icon X-Large: * 📵	Video-48x48.png	•			
	Width: * 🗊	950				
	Height: * 📵	650				
Advanced Settings						•
Update Cancel						

• **Dimensions:** Enter a **Width** and **Height** for the Launch Window used to present the Learning Element.

Additional Formats				Active Team: All Members	•
General Settings					^
	Format Name: * (1) Icon Small: * (1) Icon Medium: * (1) Icon Large: * (1) Icon Y Large: * (1) Width: * (1) Height: * (1)	Video - Vimeo Video-16x16.png Video-24x24.png Video-32x32.png Video-48x48.png 1280 720	* * *		
Advanced Settings					~
Update Cancel					

• Advanced Settings: Click the down arrow to expand this section.

Additional Formats			Active T	Team:	All Members	•
General Settings						^
	Format Name: * (1) Icon Small: * (1) Icon Medium: * (1) Icon Large: * (1) Icon X-Large: * (1) Width: * (1) Height: * (1)	Video - Vimeo Video-16x16.png Video-24x24.png Video-32x32.png Video-48x48.png 720				
Advanced Settings						~
Update Cancel						

 Launch Window: Select the type of window (Current, New, pop-up or Modal) that the Learning Element will be launched in.

Advanced Settings		
	Launch Window: 🗊	◯ Current ◯ New ◯ Popup ⑧ Modal
		LE Type: Module and Rich Text cannot use Current or New.
Force Additional	Popup for Mobile: 🗊	
Update Cancel		

• 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.

Advanced Settings				
Launch Window: 🕕	 Current New Popup Modal LE Type: Module and Rich Text cannot use Current or New. 			
Force Additional Popup for Mobile:				
Update Cancel				

• **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.

Launch Window: 📵 💌 Current 🔍 New 🔍 Popup 🔍 Modal	
LE Type: Module and Rich Text cannot use Current or New.	
Update Cancel	

• Click **Update** to save the changes and return to the Learning Element Format listing page.

Advanced Settings		^
	Launch Window: 🗐	Current New Popup Modal Modal A
		LE Type: Module and Rich Text cannot use Current or New.
	Force Download: 🕕	8
Update Cancel		

PACCORD LMS

Edit an existing Learning Element Format

• Click on the **pencil icon** next to an existing Learning Element Format in the list.

SCORM

	lcon	Name	Details
ø	11111 11111	Custom	Modal Window - 950x650
	0	Presentation	No Resume - Modal Window - 950x650
Į	ø	Presentation / Quiz	Modal Window - 950x650
2	ø	Presentation / Quiz	Only Success - No Resume - Popup Window - 950x650
ø	0	Presentation2	No Resume - Popup Window - 950x650
ø	/	Quiz	Modal Window - 950x650
ø	/	Quiz	No Resume - Modal Window - 950x650

^

- 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.

SCORM Formats		Active Team: All Members	•
General Settings			
Format Name: * () Icon Small: * () Icon Medium: * () Icon Large: * () Icon X-Large: * () Width: * () Height: * ()	Presentation Presentation-16x16.png Presentation-24x24.png Presentation-32x32.png Presentation-48x48.png 980 680		
Advanced Settings			
Launch Window: Force Additional Popup for Mobile: Status Options: Duration Reporting: Scorable (required for Quizzes): No Resume: Combine Legacy SCO settings:	 Popup Modal Success Over Completion (default) SCO LMS Captivate Quiz (5.x) Articulate ('09) 		
Update Cancel Delete			

Delete an existing Learning Element Format

• Click on the **pencil icon** next to an existing Learning Element Format in the list.

	Icon	Name	Details	
2		Custom	Modal Window - 950x650	
0	0	Presentation	No Resume - Modal Window - 950x650	
e	ø	Presentation / Quiz	Modal Window - 950x650	
Į	ø	Presentation / Quiz	Only Success - No Resume - Popup Window - 950x650	
P	0	Presentation2	No Resume - Popup Window - 950x650	
P	/	Quiz	Modal Window - 950x650	
ø	1	Quiz	No Resume - Modal Window - 950x650	

- In the Learning Element Format page, scroll down to the bottom of the page;
 Click the Delete button.

SCORM Formats		Active Team: All Members
General Settings		
Format Name: * 📵	Custom	
Icon Small: * 🕕	Calendar-16x16.png	
lcon Medium: * 📵	Calendar-24x24.png	
Icon Large: * 🕕	Calendar-32x32.png	
Icon X-Large: * 📵	Calendar-48x48.png	
Width: * 💷	950	
Height: * 🕕	650	
Advanced Settings Launch Window: () Force Additional Popup for Mobile: ()	Popup Modal	
Status Options: ()	Success Over Completion (default)	¥
Duration Reporting:	● SCO ○ LMS	
Scorable (required for Quizzes):	×.	
No Resume: 🕕		
Combine Legacy SCO settings: 🕕	 Captivate Quiz (5.x) Articulate ('09) 	
Update Cancel Delete		

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.**

P	cco	rd	LMS				🗃 🛛 LMS Administrator 🍄 Logout
Home	My Courses	Elective	s Reso	urces Transcri	pt Community	ECommerce	LMS Admin
Catalog	g Roles	Teams	Actions	Configuration			Active Team: All Members
Config	uration						
Ô	General Optio	ns					
	Notifications						
	Folder Types						
ø	Learning Elem	ent Formats					
A state	Status Types)				
	Education Acti	vities					
${\mathbb X}$	ILT Resources						
	Role Based Re	direction					
	Import Data						
P	Enhanced Fea	ture Status					
*	Integration						
<u>_</u>	License Key ar	nd Details					

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.

PACCORD LMS

Sta	atus	; Types	Active Team: All Members
Con	nple	tion	
	lco	n Name	
1	0	Completed	
	0	Failed	
2	0	In Progress	
2	-	Not Tracked	
1	0	Not Attempted	
2	0	Passed	
ILT			
Add	litior	nal	
Rel	turn		

Edit an existing Learning Element Status Type

• Click/Tap on the **pencil icon** next to an existing Learning Element Status type in the list.

Com	pleti	ion	^
	Icon	Name	
) 0	Completed	1
	0	Failed	
	0	In Progress	
		Not Tracked	
	0	Not Attempted	
2	0	Passed	

- 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 -
lcon Large: * 🕕	PieGreen-32x32.png 👻
Icon X-Large: * 🕕	PieGreen-48x48.png 👻



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**.

P	cco	rd	LMS					🛎 🛛 LMS Administrator 🍄 Logout
Home	My Courses	Elective	s Reso	ources	Transcript	Community	ECommerce	LMS Admin
Catalog	g Roles	Teams	Actions	Config	uration			Active Team: All Members
Config	uration							
Ô	General Option	ns						
	Notifications							
	Folder Types							
ø	Learning Elem	ent Formats						
×	Status Types							
	Education Activ	vities]					
st	ILT Resources							
-	Role Based Re	direction						
	Import Data							
2	Enhanced Fea	ture Status						
*	Integration							
	License Key ar	d Details						

Initially, the Education Activity List will show only Accord LMS default activities.

You may create your own Education Activities.

Name	Status	
2 LMS Admin Master	Active	
9 LMS Learner Master	Active	
Workplace Conduct	Active	

Add New Education Activity

• Click Add New Education Activity.

Education Activity List

Add New Education Activity

	Name	Status
ø	LMS Admin Master	Active
1	LMS Learner Master	Active
ø	Workplace Conduct	Active

^

The Education Activity Details panel displays.

Education Activity Details		^
	Active O Inactive	
Gaming Activity: Description:		
	h.	
Update Cancel		

- 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.

Name: *	Attributes and Performance	
Status:	Active O Inactive	
Gaming Activity:	0	
Description:	Education Activity for Attributes and Performance	

^

^

The new Education Activity will then display in the **Education Activity List.**

Education Activity List

_	Name	Status
Ø	Attributes and Performance	Active
2	LMS Admin Master	Active
ø	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.**

Pccord LMS		🛛 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript	Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration		Active Team: All Members
Configuration		
General Options		
Notifications		
Folder Types		
6 Learning Element Formats		
🖌 Status Types		
Education Activities		
X ILT Resources		
Role Based Redirection		
import Data		
P Enhanced Feature Status		
> Integration		
License Key and Details		

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.

Resources can only be ea	dited by the Owner or their Parents				
structors					
Username	Name	S	tatus (Dwner	
Agray	AshleighGray	A	ctive A	All Members	
Arideout	Alexandra Rideout	A	ctive A	All Members	
Jdavidson	John Davidson	A	ctive A	All Members	
Jhartley	Joshua Hartley	A	ctive A	All Members	
Karbuckle	Kelsey Arbuckle	A	ctive A	All Members	
	20 -			5 i	tems in 1 pa
d New Instructor	ize <u>20</u> •				
dd New Instructor					
Id New Instructor		Max Learners	Status	Owner	
Id New Instructor cations Name		50	Active	All Members	
Id New Instructor cations Name Corporate Headquart					
Id New Instructor Cations Name Corporate Headquart Crimson Innovations Neo Magna Room		50 30 450	Active	All Members All Members All Members	
Id New Instructor ocations Corporate Headquart Crimson Innovations Neo Magna Room Raritan Plaza	ers	50 30 450 50	Active Active	All Members All Members	
Id New Instructor Cations Corporate Headquart Corporate Headquart Crimson Innovations Neo Magna Room Raritan Plaza SAP Australia (Melbou	ers rne)	50 30 450 50 30	Active Active Active	All Members All Members All Members All Members All Members All Members	
Id New Instructor Cations Name Corporate Headquart Crimson Innovations Neo Magna Room Raritan Plaza SAP Australia (Melbou SAP Australia Sydneyi	ers irne) (Sydney)	50 30 450 50 30 35	Active Active Active Active	All Members All Members All Members All Members All Members All Members All Members	
Id New Instructor Cations Corporate Headquart Crimson Innovations Neo Magna Room Raritan Plaza SAP Australia (Melbou SAP Australia Sydney Training Choice Adela	ers rne) (Sydney) Ide	50 30 450 50 30 35 30 35	Active Active Active Active Active Active Active	All Members All Members All Members All Members All Members All Members All Members All Members	
dd New Instructor Cations Name Crimson Innovations Neo Magna Room Raritan Plaza SAP Australia (Melbou SAP Australia Sydney j Training Choice Adela Training Choice Brisba	ers rne) (Sydney) Ide	50 30 450 50 30 35	Active Active Active Active Active Active Active Active Active	All Members All Members All Members All Members All Members All Members All Members All Members	
Id New Instructor Cations Name Corporate Headquart Crimson Innovations Neo Magna Room Raritan Plaza SAP Australia (Melbou SAP Australia Sydney Training Choice Adela Training Choice Brisba WebEx	ers rne) (Sydney) Ide	50 30 450 50 30 35 30 35	Active Active Active Active Active Active Active	All Members All Members All Members All Members All Members All Members All Members All Members	
dd New Instructor Cations Corporate Headquart Corporate Headquart Corporate Aedquart Reo Magna Room Raritan Plaza SAP Australia (Melbou SAP Australia Sydney g Training Choice Adela Training Choice Brisba	ers rne) (Sydney) Ide	50 30 450 50 30 35 30	Active Active Active Active Active Active Active Active Active	All Members All Members All Members All Members All Members All Members All Members All Members	

Add New Instructor

• Click Add New Instructor.

Instructors

Username	Name	Status	Owner	
📎 Agray	AshleighGray	Active	All Members	
📎 Arideout	Alexandra Rideout	Active	All Members	
🦎 Jdavidson	John Davidson	Active	All Members	
📎 Jhartley	Joshua Hartley	Active	All Members	
📎 Karbuckle	Kelsey Arbuckle	Active	All Members	
I I Page Size:	20 🔻			5 items in 1 page
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.

nstructor	Active Team: All Members
select All Team Members or Role(s) to Search for new In	structors.
Instructor	
All Team Members: 🕕	
Learning Roles: 🕕	Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles
Search String: 0	
Search Field: 🕕	User Name 👻
Sort Order: 📵	User Name 👻
	Search
	Select / Unselect
Status: 0	Active O Inactive
Owner: ()	All Members 👻
Team Availability: * 🕕	All Members

• Mark **All Team Members** or individual **Learning Roles** to search for the user which will be used as the Instructor.

Instructor		^
All Team Members: 🕕		
Learning Roles: 🕕	🕨 🔟 Global Roles	
0	🕨 🔲 LMS Example Roles	
	ELMS Learning Roles	
	New Learners	
	🕨 🥅 Social Groups	
	Translation Roles	

- Use the **Search String** field to locate the user of your choice.
- Click/Tap **Search**.

Search String: 🕕	short
Search Field: 🕕	User Name 👻
Sort Order: 🕕	User Name 👻
Ĺ	Search Select / Unselect
Status: 🛈	● Active ○ Inactive
Owner: 🕕	All Members 🔹
Team Availability: * 📵	All Members

The list will refresh bringing up the results for your query.

• Select the desired user from the list.

Search String: 🕕	short	
Search Field: 📵	User Name 👻	
Sort Order: 🕕	User Name 🔻	
	Search	
	Select / Unselect	Learner List (1)
	☑ Jshort [joseph short]	

• **Status:** Select for the Instructor to be **Active** or **Inactive**. Only Active Instructors may be utilized.

Status:	Active O Inactive	
Owner:	All Members	•
Team Availability: *	🕽 🕨 🗌 All Members	

• **Owner:** From the drop-down menu, select which Team owns and can edit this Instructor.

	Status: 🛈	● Active ○ Inactive	
	Owner: 🛈	All Members	•
Team Avail	ability: * 🛈	All Members	

• **Team Availability:** Select which Teams may utilize this Instructor.

Status: 🕕	● Active ○ Inactive	
Owner: 🛈	All Members	•
Team Availability: * 📵	🕨 🗹 All Members	

• Click **Create** to save the new Instructor.

All Team Members: 🕕		
Learning Roles: 📵	Global Roles	
	LMS Example Roles	
	LMS Learning Roles	
	Environment Environme	
	Translation Roles	
Search String: 🕕	short	
Search Field: 🕚	User Name 💌	
Sort Order: 🕕	User Name 👻	
	Search	
	Select / Unselect	Learner Li
	☑ Jshort [joseph short]	
Status: 🕕	Active O Inactive	
	All Members 👻	
Owner: 🕕		
	All Members	

The recently created Instructor will be displayed in the list along with some additional information such as **Status** and **Owner**.

Username	Name	Status	Owner	
Agray	AshleighGray	Active	All Members	
Arideout	Alexandra Rideout	Active	All Members	
Jdavidson	John Davidson	Active	All Members	
Jhartley	Joshua Hartley	Active	All Members	
Karbuckle	Kelsey Arbuckle	Active	All Members	
short Jshort	joseph short	Active	All Members	
I ◀ 1 ▶ ▶ Page Size:	20 💌			6 items in 1 pa

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.

Username	Name	Status	Owner	
Agray	AshleighGray	Active	All Members	
Arideout	Alexandra Rideout	Active	All Members	
Jdavidson	John Davidson	Active	All Members	
Jhartley	Joshua Hartley	Active	All Members	
Karbuckle	Kelsey Arbuckle	Active	All Members	
Jshort	joseph short	Active	All Members	
 ▲ 1 ▶ ▶ Page Size: 	20 -			6 items in 1 pa

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

Instructor	^
Username: 🛈 Name: 🛈 Status: 🕕	Jshort joseph short O Active Inactive
Owner: 🕄 Team Availability: * 🕄 Version History: 🕄	All Members All Members Created: SuperUserAccount on 22 March 2017 at 8:18 AM
Update Cancel Delete	

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.

Username	Name	Status	Owner	
Agray	AshleighGray	Active	All Members	
Arideout	Alexandra Rideout	Active	All Members	
Jdavidson	John Davidson	Active	All Members	
Jhartley	Joshua Hartley	Active	All Members	
Karbuckle	Kelsey Arbuckle	Active	All Members	
Jshort	joseph short	Active	All Members	
I I I I I Page Size:	20 -			6 items in 1 pa

Click **Delete** to save your changes

Instructor	
Username: 🛈	Jshort
Name: 🕕	joseph short
Status: 🕕	O Active Inactive
Owner: 🕕	All Members 👻
Team Availability: * 📵	▶ 🗹 All Members
Version History: 🔘	Created: SuperUserAccount on 22 March 2017 at 8:18 AM
	Updated: SuperUserAccount on 22 March 2017 at 8:20 AM
Update Cancel Delete	

^

^

Add New Location

• Click Add New Location.

Locations

	Name	Max Learners	Status	Owner	
1	Corporate Headquarters	50	Active	All Members	
1	Crimson Innovations	30	Active	All Members	
1	Neo Magna Room	450	Active	All Members	
\mathbb{N}	Raritan Plaza	50	Active	All Members	
1	SAP Australia (Melbourne)	30	Active	All Members	
1	SAP Australia Sydney (Sydney)	35	Active	All Members	
1	Training Choice Adelaide	30	Active	All Members	
\mathbb{N}	Training Choice Brisbane	40	Active	All Members	
1	WebEx		Active	All Members	
1	GoToWebinar		Active	All Members	
М	< 1 ► ► Page Size: 20 -				10 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 may be utilized.

Location		^
Name: * 🛈 Status: 🛈	Central Training Room Ontario Active O Inactive	
Location Type: 🗐	Physical - Class or Venue 🔹	
Max Learners: 🕕		
Information URL: 🕕	http://	Launch Information
Owner: 🖲	All Members	
Team Availability: * 🕕	All Members	

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 <u>GoToWebinar and GoToTraining Integration</u> 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 <u>GoToWebinar and GoToTraining Integration</u> in our Appendix for information on how to configure these Location Types).

Name: * 🕕	Central Training Room Ontario		
Status: 0	Active O Inactive		
Location Type: 1	Physical - Class or Venue	~	
Max Learners: 🕕	Physical - Class or Venue Virtual - General		
Information URL: 🕕	Virtual - GoToWebinar Virtual - GoToTraining	aunch Information	
Owner: 🕕	All Members		

- **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.

Max Learners: 🕕	50			
Information URL: 🕕	http://www.centraltrainingontario.com	Launch Information		
Owner: 🕕	All Members 👻			
Team Availability: * 📵	▶ ☑ All Members			
Description: (1)				
う・ペーン 暗 創一号 弗 羅				
_	目言 三 三 彡 x* X₂ Aa aA 岸 津 詰 田 🔝 🖏 🖏 🐼			
"Open Sans" • Size • 14px • Apply CSS Class • Normal • Format Sets • Zoom •				
	 Equipped with laptop, projector, flipchart, TV, OHP and whiteboard 			
Flexible room layout				
 Natural light Onsite coordination and sug 	port			
 Inclusive of refreshments 	por			
🧨 Design 🔷 HTML 🔍 Preview				
Create Cancel				
Caller				

The recently created Location name will be displayed in the list along with some additional information such as **Max Learners**, **Status** and **Owner**.

Name	Max Learners	Status	Owner
Corporate Headquarters	50	Active	All Members
Crimson Innovations	30	Active	All Members
Neo Magna Room	450	Active	All Members
Raritan Plaza	50	Active	All Members
SAP Australia (Melbourne)	30	Active	All Members
SAP Australia Sydney (Sydney)	35	Active	All Members
Training Choice Adelaide	30	Active	All Members
Training Choice Brisbane	40	Active	All Members
WebEx		Active	All Members
GoToWebinar		Active	All Members
Central Training Room Ontario	50	Active	All Members

Add New Location

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.

Locations

Name	Max Learners	Status	Owner
📎 Corporate Headquarters	50	Active	All Members
S Crimson Innovations	30	Active	All Members
📎 Neo Magna Room	450	Active	All Members
📡 Raritan Plaza	50	Active	All Members
📎 SAP Australia (Melbourne)	30	Active	All Members
SAP Australia Sydney (Sydney)	35	Active	All Members
🥎 Training Choice Adelaide	30	Active	All Members
📎 Training Choice Brisbane	40	Active	All Members
📡 WebEx		Active	All Members
GoToWebinar		Active	All Members
📡 Central Training Room Ontario	50	Active	All Members
K ← 1 → H Page Size: 20 -			11 items in 1 p

^

Add New Location

- Perform the necessary updates.
- Click **Update** to save changes.

ocation				
Name: * 🗊	Central Training Room Ontario			
Status: 🕕	Active Inactive			
Location Type: 🛽	Physical - Class or Venue			
Max Learners: @	55			
Information URL:	http://www.centraltrainingontario.com	Launch Information		
Owner: 0	All Members 👻			
Team Availability: * 📵	All Members			
Description:				
9・0・1 ※ 暗 💩 🖶 🏯				
B I ∐ abc A · Φ) · 18				
"Open Sans" • Size • 14px • Apply CSS Class • Normal • Format Sets • Zoom •				
 Equipped with laptop, pro 	ector, hipchart, TV, OHP and whiteboard	^		
 Flexible room layout 				
 Natural light Onsite coordination and s 	upport			
 Inclusive of refreshments 	upport			
 Capacity to accommodate 	up to 55 delegates			
🧨 Design 🛛 🛠 HTML 🔍 Previ	54			
Version History:	Created: SuperUserAccount on 22 March 2017 at 8:28 AM			
	Updated: SuperUserAccount on 22 March 2017 at 8:30 AM			
Update Cancel Delete				

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.

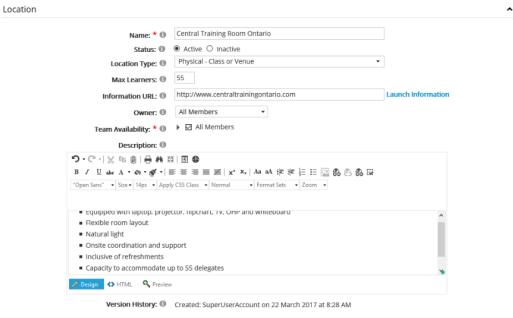
Locations

Name	Max Learners	Status	Owner	
S Corporate Headquarters	50	Active	All Members	
Section Section Crimson Innovations	30	Active	All Members	
📎 Neo Magna Room	450	Active	All Members	
🛐 Raritan Plaza	50	Active	All Members	
📎 SAP Australia (Melbourne)	30	Active	All Members	
SAP Australia Sydney (Sydney)	35	Active	All Members	
🦠 Training Choice Adelaide	30	Active	All Members	
Note: Training Choice Brisbane	40	Active	All Members	
📎 WebEx		Active	All Members	
GoToWebinar		Active	All Members	
🦠 Central Training Room Ontario	50	Active	All Members	
H I H Page Size: 20 V			11 items in 1	page

^

Add New Location

• Click Delete.



Updated: SuperUserAccount on 22 March 2017 at 8:30 AM



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.**

Home My Courses	Electives Reso	ources	Transcript	Community	ECommerce	LMS Admin	
My Courses Configur	ation						~
	Learner Module ID:	505					
	Tab ID:	1 73					
	Admin Module:	LMS A	Admin -> LMS (503))	•		
	Parent Folder:	Sho	w All Folders >		•		
	Maximum Depth:	0					

• Click on the **Access** heading to expand this section.

Paccord LMS

General Settings	>
Calendar	>
Electives	>
Transcript	>
Access	>
Templates	>

Allow Redirect;

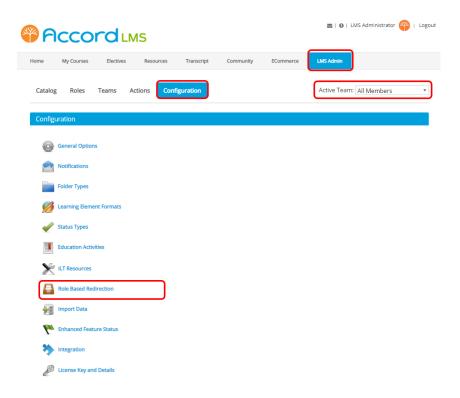
- Select Never, Always or Only with access code.
- Scroll to bottom and click **Update** to save changes.

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 O Always O Only with access code

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.

Redirect L	ist	^	
Drag and Drop to change the order. Redirect with first success.			
	Role or Team	Redirect URL	
~0	Global Roles > Expirable Role		
Add New Re	edirect		

• Input a **Redirect URL** in the field provided.

Redirect List

Drag and Drop to change the order. Redirect with first success.									
	Role or Team	Redirect URL							
«Ø	Global Roles > Expirable Role 🔹	http://demo.accordims.com/en-us/mycourses.aspx							
Add New Re	direct								

~

• Click the **check mark** to save changes.

Redirect	List	^
Drag and	d Drop to change the order. Redirect with first success.	
	Role or Team	Redirect URL
0	Role of Team	Redirect ORL
	Global Roles > Expirable Role	http://demo.accordlms.com/en-us/mycourses.aspx
Add New I	Redirect	

Editing a Redirection

To edit a Role Based Redirection;

• Click the **pencil icon** next to the Redirection you want to edit.

er. Redirect with first success.		
	Redirect URL	
pirable Role	http://demo.accordlms.com/en-us/mycourses.aspx	
	virable Role	

- Perform the required modifications.
- Click the **check mark** to save changes.

Redirect List

Drag and I	Drop to change the order. Redirect with first success.			
	Role or Team		Redirect URL	
<u>-</u>	Global Roles > Expirable Role	٠	http://demo.accordlms.com/en-us/mycourses.aspx	
Add New Re	direct			

Deleting a Redirection

To delete a redirection;

• Click the red cross next to the redirection you want to delete.

Redirect List

Drag and Drop to change the order. Redirect with first success.

Role or Team

Redirect URL

Image: Comparison of the order of the o

Add New Redirect

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**.

P	JCCC	ordi	.MS				🜌 🛛 LMS Administrator 🍄 Logout
Home	My Courses	Elective	s Reso	urces Transcrij	ot Community	ECommerce	LMS Admin
Catalo	og Roles	Teams	Actions	Configuration)		Active Team: All Members
Confi	guration						
0	General Optio	ons					
	Notifications						
	Folder Types						
Ø	Learning Elen	nent Formats					
4	Status Types						
	Education Act	ivities					
×	ILT Resources	5					
	Role Based R	edirection	_				
1	Import Data		J				
2	Enhanced Fea	ature Status					
7	 Integration License Key a 	nd Datails					
ð	 License Key a 	nd DetallS					

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.

Accord LMS

- **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.

E	E S - C ImportFolderAttempts.csv - Excel										
Fi	ile Home	Insert	Page Layout	Formulas	Data	Review	View	LOAD TEST	TEAM	♀ Tell me v	what you want to do
C1	4 👻	×	√ f _x								
	Α		В			C	, ,	D	E	E	F
1	Username		Folder	ID		Complet	ionDate	Score	Archivel	DueDate	
2	SRepoff	858E3C	34-9368-479A-B	E3B-983D970	E79A7	8/15/20	2 12:12	0.8242	8/17/20	12 12:12	
3	JMasse	6CE536	55-09BC-4C54-9	750-E3D387B	6DF35	8/15/20	2 12:12	0.1244	8/17/20	12 12:12	
4	HRodriguez	858E3C	34-9368-479A-B	E3B-983D970	E79A7	8/15/20	2 12:12	0	8/15/20	12 12:12	
5	PCarmichael	88E3C3	34-9368-479A-BE	3B-983D970	E79A7	8/15/20	2 12:12	0	8/15/20	12 12:12	
6											
7											

- 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.

Legacy Import Data

Folder Import	\sim
Import legacy Folder records. More Information	
Select CSV File: Choose File	
Import	

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

• Once the Import Process finishes, a status report will display.



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; <u>http://help.accordlms.com/m/11168/l/</u> <u>127072-teams-introduction</u>.

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 <u>https://www.accordlms.com/resources/documentation</u>.

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.

Pccord LMS	🛛 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
	8
Catalog Roles Teams Actions Configuration	Active Team: All Members
Teams	Count
🖌 🕥 All Members	
🤽 Learners	100
🧭 Content Admin	0
🧟 Learner Admin	0
📓 Report Admin	1
👤 Team Admin	4

Prepare for Team Import

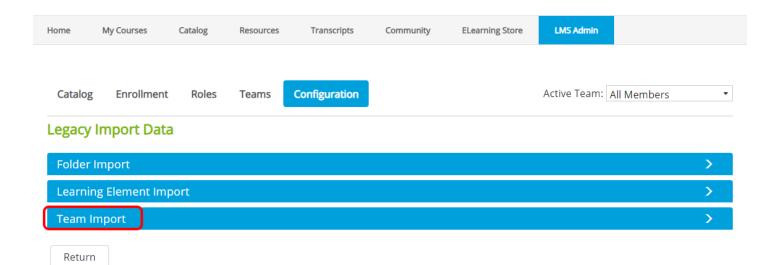
Once you have any **Teams** desired for import setup and saved in a (.csv) file;

- 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.

P		rd	LMS					🖀 🛛 LMS Administrator 🍄 Logout
Home	My Courses	Elective	es Reso	ources	Transcript	Community	ECommerce	LMS Admin
Catalog	g Roles	Teams	Actions	Config	uration			Active Team: All Members
Config	uration							
Ô	General Option	ns						
	Notifications							
	Folder Types							
Ø	Learning Elem	ent Formats						
×.	Status Types							
	Education Activ	vities						
st	ILT Resources							
	Role Based Re	direction						
(J)	Import Data							
P	Enhanced Feat	ture Status						
*	Integration							
	License Key ar	d Details						

 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

Team Import	\checkmark
Import Team records. More Information	
Select CSV File: Choose File Import	

Once you have selected the chosen Team (.csv) file from your computer system, click
 Import.

Team Import		\sim
Import Team records. More Information		
Select CSV File:	Sample Import Teams.csv	
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.

Team Import	\sim
Import Team records. More Information	
Select CSV File: Choose File	
Import	
Teams Import Total Records in List: 7	
Total Team Created: 7	
Total Team Updated: 0	
Total Records in Error: 0	

Accord LMS

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; <u>https://www.accordlms.com/resources/documentation</u>.

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.

Home My Courses	Electives	Resou	rces Transcript	Community	ECommerce	LMS Admin	
Catalog Roles	Teams	Actions	Configuration			Active Team:	All Members 🔹
Roles							
	Filter by R	ole Group: 📵	<global roles=""></global>		•		
Name	Filter by Re	ole Group: 🕚 Count	<global roles=""></global>	Start Date	Due Date	Expiration Date	Re-Activation Date
Name				Start Date	Due Date		Re-Activation Date

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.

Pccord LMS	🖀 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Configuration	
General Options	
Notifications	
Folder Types	
Learning Element Formats	
Status Types	
Education Activities	
X ILT Resources	
Role Based Redirection	
Import Data	
PM Enhanced Feature Status	
> Integration	
License Key and Details	

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.

Legacy Import Data

Folder Import	\sim
Import legacy Folder records. More Information	
Select CSV File: Choose File	
Import	
Learning Element Import	>
Team Import	>
Role Import	>
Return	

• Next to Select CSV File, click Choose File

Role Import	\sim	,
Import Role records. More Information		
Select CSV File: 🕕	Choose File	
Import		

Role Import

Import Role records. More Information...

Select CSV File:
Sample Import Roles .csv

• Once you have selected the chosen Role (.csv) file from your computer system, click **Import**.

Return

Return

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.

Role Import	\sim
Import Role records. More Information	
Select CSV File: Choose File Import Total Records in List: 3 Total Roles Created: 3 Total Roles Duplicated: 0 Total Records in Error: 0	

Return

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.

riccor					🛛 🕢 LMS	5 Administrator 🍄 Logoui
Home My Courses	Electives Resource	es Transcript	Community	ECommerce	LMS Admin	
Catalog Roles T	eams Actions	Configuration			Active Team: /	All Members 🔹
Roles						
	Filter by Role Group: 📵	<global roles=""></global>		•		
Name	Rules Count	<global roles=""> Boston-North Office</global>)		Expiration Date	Re-Activation Date
Administrative Staff	0	LMS Example Learning	g Roles		None	None
Registered Users	6	LMS Learning Roles Translation Roles			None	None
Unverified Users	1				None	None
🖉 Warehouse Staff	0	Immediate	Immediate	None	None	None

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 <u>https://www.accordlms.com/resources/documentation</u>.

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.

Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
								9
Catalo	g Roles	Teams A	ctions Confi	guration			Active Team: All Mem	bers
	_							
Catalo	g							Q

Regional Webinars

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**.

	🕿 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community	ECommerce LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Configuration	
General Options	
Notifications	
Folder Types	
Learning Element Formats	
💞 Status Types	
Education Activities	
K ILT Resources	
Role Based Redirection	
Import Data	
P Enhanced Feature Status	
> Integration	
License Key and Details	

• 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.

Legacy Import Data

Folder Import	\sim
Import legacy Folder records. More Information	
Select CSV File: Choose File	
Import	
Learning Element Import	>
Team Import	>
Role Import	>
Return	

• Next to Select CSV File, click Choose File

Legacy Import Data

Folder Import		$\mathbf{\vee}$
Import legacy Folder re	ecords. 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.

Pccord LMS	🛛 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
	0
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog	
Copy To 🕶 Remove / Delete	0
 My Catalog <u></u>_Orphans Managing Performance Mew Employee Orientation (ILT) 	
Regional Webinars	
Warehouse Safety Severe Weather Plan Workplace Injury	
 PTO Guidelines Power Outage Contingencies 	

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 <u>https://www.accordlms.com/resources/documentation</u>.

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.

	Admin
	tive Team: All Members 🔹
Catalog	
Catalog	
	0
Copy To Move To Remove / Delete	
My Catalog	
 Crobans Crobans Managing Performance 	
 O Managing Performance Course Slides ✓ Final Exam 	
Contract Contraction (ILT)	

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**.

XXX	6	cco	rd						🛛 🛛 LMS Administrator 🍄 Logout
		cco		LMS					
Hon	ne	My Courses	Elective	es Res	ources	Transcript	Community	ECommerce	LMS Admin
c	Catalog	Roles	Teams	Actions	Conf	iguration			Active Team: All Members
C	Configu	uration							
	Ŷ	General Optio	ns						
		Notifications							
		Folder Types							
	Ø	Learning Elem	ent Formats						
	1	Status Types							
		Education Acti	vities						
	×	ILT Resources							
	Ð	Role Based Re	direction						
		Import Data							
	٣	Enhanced Fea	ture Status						
	*	Integration							
	P	License Key ar	nd Details						

• 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.

PAC	corc	LMS				2 0 L	MS Administrator	🍄 Logout
Home My	Courses Elec	tives Resourc	es Transcript	Community	ECommerce	LMS Admin		
Catalog	Roles Teams	6 Actions	Configuration			Active Team:	: All Members	•
Legacy Imp								>
Learning E	lement Import							>
Team Impo	ort							>
Role Impor	t							>
Return								

• Next to Select CSV File, click Choose File

Learning Element Imp	port	~
Import legacy Learnin;	g 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. Mor	e 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 Flammata langest		
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.

Accord	🛛 0 LMS Administrator 🍄 L
Home My Courses Electives Resources Transcript Community EC	Commerce LMS Admin
	0
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog	
Copy To * Move To * Remove / Delete	٥
🖌 🗏 🛅 My Catalog	
A Company Performance	
Of Managing Performance Course Slides	
🛛 🥖 Final Exam	
Oritical Thinking and Problem Solving	
The Family Medical Leave Act	
Preventing Unlawful Retaliation in the Workplace	
New Employee Orientation (ILT)	

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**.

P		ord	LMS					🜌 🕕 LMS Administrator	🍄 Logout
Home	My Courses	Elective	s Reso	ources Tra	anscript	Community	ECommerce	LMS Admin	
Catalog	g Roles	Teams	Actions	Configurat	tion			Active Team: All Members	•
Config	uration								
Ô	General Optio	ins							
	Notifications								
	Folder Types								
Ø	Learning Elem	ent Formats							
Ľ	Status Types								
	Education Acti	ivities							
\gg	ILT Resources								
-	Role Based Re	direction							
	Import Data		_						
<u> </u>	Enhanced Fea	ture Status							
→	Integration License Key an	nd Details							

Feature Status Details	
Ajax Extensions	
P Ajax Extensions are functioning property.	
Enhanced Charting	
P Enhanced Charting is enabled. If a Pie Chart is showing, Charting is properly configured. If a Pie Chart is NOT showing, please try the 'Configure' link found below	i.
Солбдите	
maxRequestLength	
Maximum Upload File Size = 1048576 KBytes Upload File Timeout = 3600 Seconds	
New Maximum Size: 1048576 KBytes New File Timeout: 3600 Seconds	
Note: these limits may be set by machine.config in shared hosting environments.	
Update	
LE Loader Path	
/DesktopModules/Interzoic.AccordLMS (default) /LMS/ (SiteUrls.config)	
Update	
xhtmlConformance	
NATTML Compliance is properly set to "Mixed Mode".	

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.



Accord LMS

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>

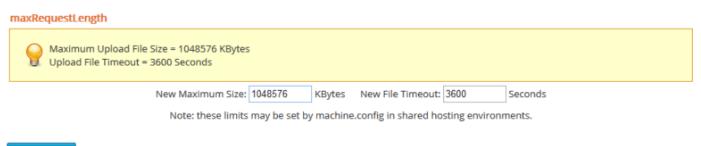
<addname="ChartImage_axd"verb="*"preCondition="integratedMode"path="ChartImage.axd"type="1

</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.



Update

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**.

xhtmlConformance	
XHTML Compliance is properly set to "Mixed Mode".	
Return	

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

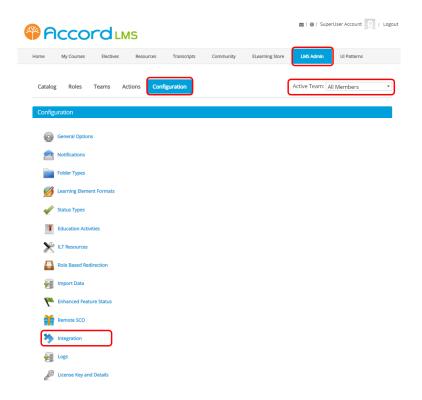
Establishing certain settings within the various integration sections will allow your Accord LMS to properly integrate with other online digital systems.

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 S	ervices	>
OpenSesa	me Marketplace	>
Integrity A	dvocate 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**.

Integration

OpenSesame Marketplace	\sim
Immediate Access to Training Courses for your Business Accord LMS provides seamless integration with the OpenSesame course catalog. OpenSesame Plus – Cost effective packaged bundle with access to over 4,000 of the most popular courses. A La Carte - Choose from over 20,000 individual courses. Flexible license options to meet any budget.	
Account Name: * Account ID: Hide MarketPlace:	
Create	
Integrity Advocate Proctoring	>

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.

Pccord LMS	🛛 0 SuperUser Account 🕅 Logout	
Home My Courses Electives Resources Transcripts Community ELearning Store	LMS Admin UI Patterns	
Catalog Roles Teams Actions Configuration	Active Team: All Members 🔹	
Catalog Copy To Move To Remove / Delete My Catalog	٩	
OpenSesame	>	

Integrity Advocate Proctoring

Integrity Advocate is an authorized third-party utilized to enable online proctoring of various online Learner activity.

Integrity Ad	vocate Proctoring	\sim
Accord LMS Proctoring is their web ca	ing for any of your Learning Elements provides seamless integration with live proctoring provided by Integrity Advocate. s done remotely via a live feed from the Learner's web camera. When a proctored Learning Element is first Launched, the Learner must enable mera and present an ID, if required. The camera will then capture random images during the LE presentation or exam. The captured images a ed 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	
	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	\sim
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 enab 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 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.	are
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.

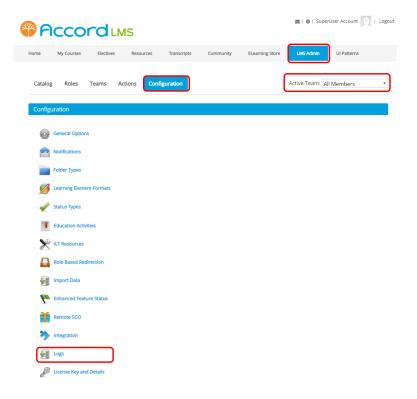
Types of log files may include; Http Requests Logs, Access Code Logs, Attempt Delete Logs, Enrollment Logs or Notification Logs.

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**.

8 0	ccoro	LMS				🖀 🛛 LMS Administrator 🎬	Logout
Home	My Courses Elec	tives Resources	Transcript	Community	ECommerce	LMS Admin	
Catalog	Roles Teams	s Actions Co	nfiguration			Active Team: All Members	•
Configu	ration						
÷	General Options						
	Notifications						
	Folder Types						
Ø	Learning Element Forma	ats					
1	Status Types						
	Education Activities						
${\mathbb X}$	ILT Resources						
-	Role Based Redirection						
	Import Data						
1	Enhanced Feature Statu	IS					
*	Integration						
a de la companya de l	License Key and Details						

Once in the Notifications section;

• Click on the **Email Templates** heading to open this section.

P A	cco	rd	MS				🔤 🕕 LMS Administrator	🍄 Logou
Home	My Courses	Electives	Resource	es Transcript	Community	ECommerce	LMS Admin	
Catalog	Roles	Teams	Actions	Configuration			Active Team: All Members	•
Notificati	ions							
General	Settings							>
Learner	Notificatio	ons						>
License	Notificatio	ns						>
Email Te	emplates							>
Update	Retur	'n						

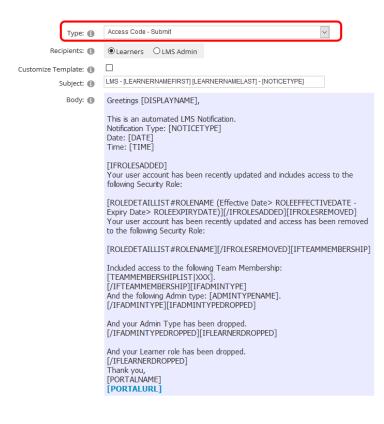
- Language: Select the language for which the notification will be used. This will be based on the preferred locale selected for each user.
- **Type:** Select an email notification type from the list, (detailed below). You can choose between Default templates or Custom templates.
- **Recipients:** Select 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.

Language: 0	English (United States)	~
Туре: 🛈	Access Code - Submit	~
Recipients: 0	Learners O LMS Admin	
Customize Template: 0		
Subject: 0	LMS - [LEARNERNAMEFIRST] [LEARNERNAMELAST] - [NOTIO	TYPE]
Body: 0	Greetings [DISPLAYNAME],	
	This is an automated LMS Notification.	
	Notification Type: [NOTICETYPE]	
	Date: [DATE]	
	Time: [TIME]	
	[IFROLESADDED]	
	Your user account has been recently updated and includes	access to the following Security
	Role:	
	[ROLEDETAILLIST#ROLENAME (Effective Date> ROLEEFF	ECTIVEDATE - Expiry Date>
	ROLEEXPIRYDATE)][/IFROLESADDED][IFROLESREMOVED]
	Your user account has been recently updated and access I	has been removed to the
	following Security Role:	
	[ROLEDETAILLIST#ROLENAME][/IFROLESREMOVED][IFT	EAMMEMBERSHIP]
	Included access to the following Team Membership: [TEAN	IMEMBERSHIPI IST (XXX)
	[/IFTEAMMEMBERSHIP][IFADMINTYPE]	
	And the following Admin type: [ADMINTYPENAME].	
	[/IFADMINTYPE][IFADMINTYPEDROPPED]	
	And your Admin Type has been dropped.	
	[/IFADMINTYPEDROPPED][IFLEARNERDROPPED]	
	And your Learner role has been dropped.	
	[/IFLEARNERDROPPED]	
	[/IFLEARNERDROPPED] Thank you,	
	[PORTALNAME]	
	[PORTALIVAME] [PORTALURL]	
	[PORTALORL]	
Available Tokens: (1)	View	
Version History: 🕕	Created: SuperUser Account on 4 March 2013 at 1:26 PM	
	Updated: SuperUser Account on 5 March 2016 at 1:52 PM	
Update Cancel		

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.



Accord LM5

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.

Туре: 🚺	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.

Utilization Limit: 🕕					
Create Unique: 🕦					
Utilization Threshlold Notifications: 🕕	Level	Value	Туре		
	Final Notice		Total	0%	
	Second Notice		●Total	0%	
	First Notice		Total	0%	
Start Date: 🕕		===			
End Date: 🕕		III			
Expiration Threshold Notifications: ()	Level	Value	Туре		
	Final Notice		Day(s)	\sim	
	Second Notice		Day(s)	\sim	
	First Notice		Day(s)	~	

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.

Туре: 🚺	Access Code Utilization
Customize Template: 1	LMS - [NOTICETYPE]
Body: 🕦	Greetings LMS Admin,
	This is an automated LMS Notification. Notification Type: [NOTICETYPE] Date: [DATE]
	Utilization Limit: [ACCESSCODEUTILIZATIONLIMIT] Current Utilized Count: [ACCESSCODEUTILIZEDCOUNT]
	Access Code ([ACCESSCODENAME]) Count has reached [ACCESSCODEUTILIZATIONLIMITWARNING] of the maximum allowed.
	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 Utilization Thresholds so that you may enter specific values when notifications are to be sent. For instructions on how to set Utilization Thresholds go to > LMS Admin Guide > Teams > Team Access Codes > Utilization and Expiration.

ation and Expiration						
Utilization Limit: 🕕						
Create Unique: @	Π					
Utilization Threshlold Notifications: ()	Level	Value	Туре			
	Final Notice		Total	○%		
	Second Notice		●Total	0%		
	First Notice		Total	0%		
Start Date: 🕕						
End Date: 🕕						
Expiration Threshold Notifications: 📵	Level	Value	Туре			
	Final Notice		Day(s)	\sim		
	Second Notice		Day(s)	\sim		
	First Notice		Day(s)	~		

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).

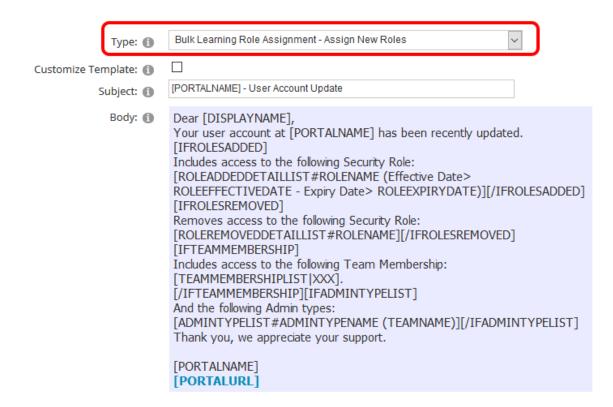
• **Recipients:** Learners or LMS Administrators.

Туре: 🚺	Bulk Learner Import
Recipients: 🚺	Learners O LMS Admin
Customize Template: 🕦 Subject: 🚯	LMS - [LEARNERNAMEFIRST] [LEARNERNAMELAST] - [NOTICETYPE]
Body: 🕦	Greetings [DISPLAYNAME], This is an automated LMS Notification. Notification Type: [NOTICETYPE] Date: [DATE] Time: [TIME] [IFROLEDETAILLIST] Your user account has been recently created/updated and includes access to the following Security Role: [ROLEDETAILLIST#ROLENAME (Effective Date> ROLEEFFECTIVEDATE - Expiry Date> ROLEEXPIRYDATE)] [/IFROLEDETAILLIST][IFTEAMMEMBERSHIP] Include access to the following Team Membership: [TEAMMEMBERSHIP][IFADMINTYPELIST] And the following Admin types: [ADMINTYPELIST#ADMINTYPENAME (TEAMNAME)] [/IFADMINTYPELIST] Thank you, [PORTALNAME]

Email Template Type: Bulk Learning Role Assignment - Assign New Roles.

This will send notifications regarding adding and revoking Security Roles and Team Memberships.

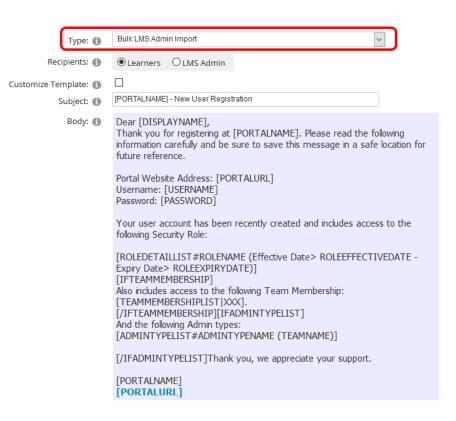
• Will only be sent to LMS Administrators.



Email Template Type: Bulk LMS Admin Import.

This will send notifications when a user is imported as an LMS Administrator.

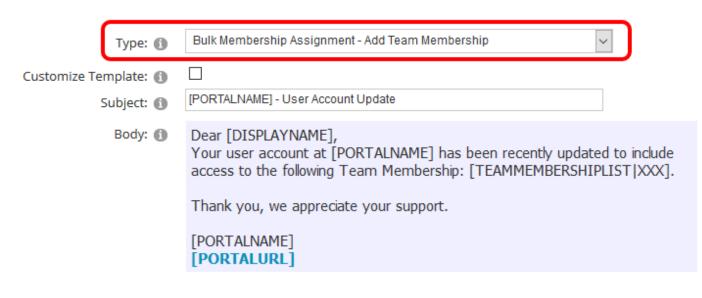
• Will only be sent to LMS Administrators.



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

Accord LMS

This will send notifications of Team Membership Dropped while using **Bulk Learner Assignment.**

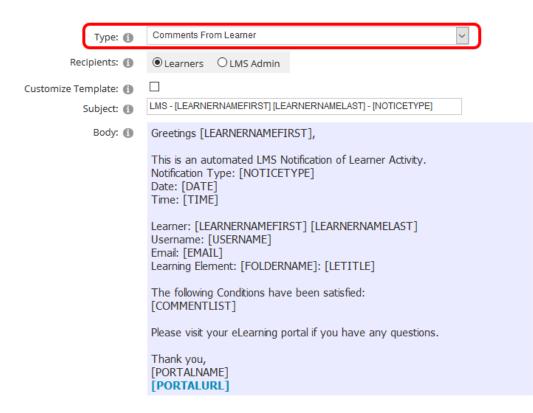
• Will only be sent to LMS Administrators.

Bulk Membership Assignment - Delete Team Membership 🗸
[PORTALNAME] - User Account Update
[i OKTAENAME] - Oser Account Opdate
Dear [DISPLAYNAME], Your user account at [PORTALNAME] has been recently updated to restrict access to the following Team Membership: [TEAMMEMBERSHIPLIST XXX].
Thank you, we appreciate your support.
[PORTALNAME] [PORTALURL]

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

PACCORD LMS

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).

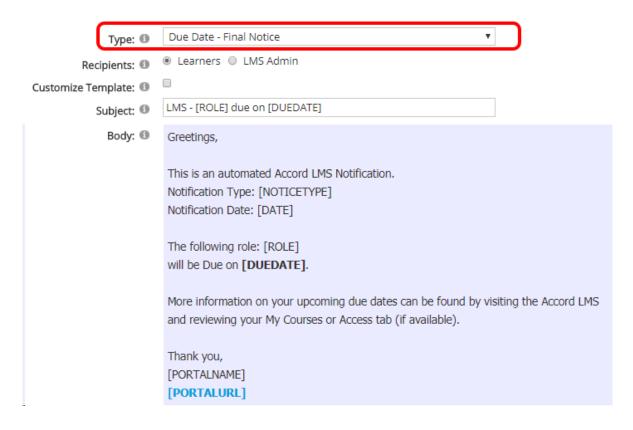
• **Recipients:** Learners or LMS Administrators.

Туре: 🚯	Conditions Satisfied
Recipients: 🚺	Learners O LMS Admin
Customize Template: 🕦 Subject: 🚯	LMS - [LEARNERNAMEFIRST] [LEARNERNAMELAST] - [NOTICETYPE]
Body: 1	Greetings [LEARNERNAMEFIRST], This is an automated LMS Notification of Status Updates. Notification Type: [NOTICETYPE] Date: [DATE] Time: [TIME] Learner: [LEARNERNAMEFIRST] [LEARNERNAMELAST] Username: [USERNAME] Email: [EMAIL] Learning Element: [FOLDERNAME]: [LETITLE] My Plan Status Updates: Status: [STATUS] This attempt has satisfied the Conditions for the following Learning Element(s): [CONDITIONLIST] Thank you, [PORTALURL]

Email Template Type: Due Date - Final Notice

Will send third notice of Learning Role Due/Expiration Date.

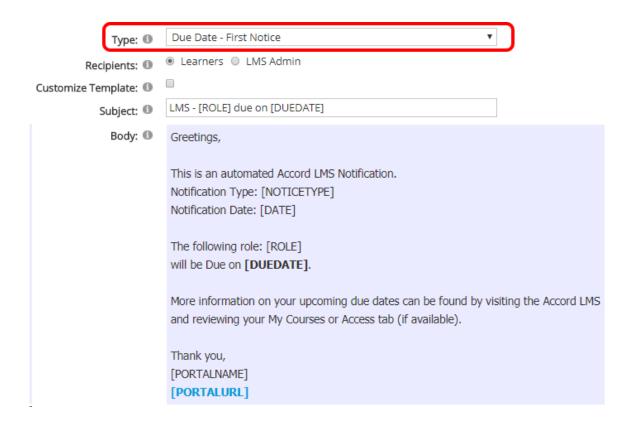
• **Recipients:** Learners or LMS Administrators.



Email Template Type: Due Date - First Notice.

Will send first notice of Learning Role Due/Expiration Date.

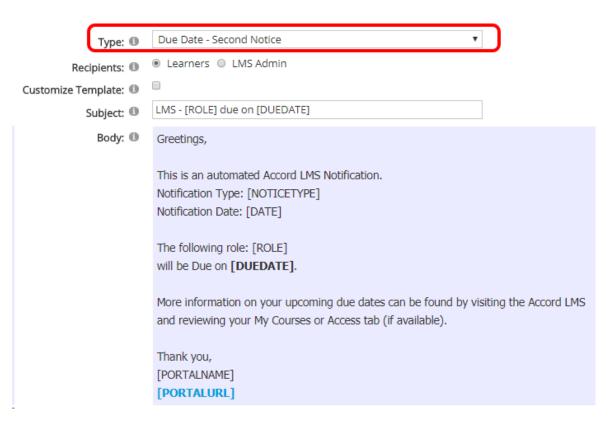
• Recipients: Learners or LMS Administrators.



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.

Type: 🚯	Learner Count - Limit Warning
Customize Template: 🕦 Subject: 🕦	LMS - [NOTICETYPE]
Body: 🚺	Greetings LMS Admin,
	This is an automated LMS Notification. Notification Type: [NOTICETYPE] Date: [DATE] Time: [TIME]
	Licensed Learner Limit: [LEARNERLIMIT] Current Learner Count: [LEARNERCOUNT]
	Site Learner Count has reached [LIMITWARNING] of the maximum allowed.
	More information on your Learner Limits can be found by visiting the LMS Admin module on your LMS Portal. Proceed to LMS Admin > Configuration > License Key and Details.
	Thank you, [PORTALNAME] [PORTALURL]

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.

Туре: 🚯	Learning Element - Admin Enrollment
Recipients: 🚺	Learners O LMS Admin
Customize Template: 🕦	
Subject: 🕦	LMS - [LEARNERNAMEFIRST] [LEARNERNAMELAST] - [NOTICETYPE]
Body: 🕦	Greetings [LEARNERNAMEFIRST],
	This is an automated LMS Notification of Admin Activity. Notification Type: [NOTICETYPE] Date: [DATE] Time: [TIME]
	Learner: [LEARNERNAMEFIRST] [LEARNERNAMELAST] The following Learning Elements have been [ISENROLL]Enrolled[/ISENROLL] [ISDROP]Dropped[/ISDROP] [IFHASFOLDERS]Catalog Folder(s): [FOLDERLIST] [/IFHASFOLDERS][IFHASLES]Learning Element(s): [LELIST] [/IFHASLES][IFHASSESSIONS]Session(s): [SESSIONLIST] [/IFHASSESSIONS]
	Please visit your eLearning portal if you have any questions.
	Thank you, [PORTALNAME] [PORTALURL]

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.

Type: 🚺	Learning Element - Learner Attempt
Recipients: 🕦	Learners O LMS Admin
Customize Template: 🕕	
Subject: 🚺	LMS - [LEARNERNAMEFIRST] [LEARNERNAMELAST] - [NOTICETYPE][IFQUI;
Body: 🕦	Greetings [LEARNERNAMEFIRST],
	This is an automated LMS Notification of Learner Activity. Notification Type: [NOTICETYPE] Date: [DATE] Time: [TIME]
	Learner: [LEARNERNAMEFIRST] [LEARNERNAMELAST] Learning Element: [LETITLE] My Plan
	Duration Estimated: [DURATIONESTIMATED] Duration Actual: [DURATIONACTUAL]
	[IFQUIZ]Quiz Score: [SCORE] Passing Score: [PASSINGSCORE] Status: [STATUS] Score Details
	[/IFQUIZ] Please visit your eLearning portal if you have any questions.
	Thank you, [PORTALNAME] [PORTALURL]

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.

Туре: 🚺	Learning Element - Learner Enrollment
Recipients: 🕦	Learners O LMS Admin
Customize Template: 🕦 Subject: 👔	LMS - [LEARNERNAMEFIRST] [LEARNERNAMELAST] - [NOTICETYPE]
Body: 🚺	Greetings [LEARNERNAMEFIRST],
	This is an automated LMS Notification of Learner Activity. Notification Type: [NOTICETYPE] Date: [DATE] Time: [TIME] Learner: [LEARNERNAMEFIRST] [LEARNERNAMELAST] The following Learning Elements have been Enrolled: Catalog Folder(s): [FOLDERLIST] Learning Element(s): [LELIST] [IFHASSESSIONS]Session(s): [SESSIONLIST] [/IFHASSESSIONS]
	Please visit your eLearning portal if you have any questions.
	Thank you, [PORTALNAME] [PORTALURL]

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.

Туре: 🚯	Maintenance Expiration
Customize Template: ()	LMS - [NOTICETYPE]
Subject: 🕦	
Body: 🕦	Greetings LMS Admin,
	This is an automated LMS Notification. Notification Type: [NOTICETYPE] Date: [DATE]
	Site License or Maintenance will Expire in [MAINTENANCEDATE].
	More information on your License and Maintenance Expiration can be found by visiting the LMS Admin module on your LMS Portal. Proceed to LMS Admin > Configuration > License Key and Details.
	Thank you, [PORTALNAME] [PORTALURL]

Email Template Type: **Report - Scheduled Delivery.**

This will send notifications regarding the Scheduled Delivery of Reports.

• Will be sent to LMS Administrators Only.

Туре: 🚯	Report - Scheduled Delivery
Customize Template: 1	LMS - Report - [REPORTFILE]
Body: 🚯	Greetings LMS Admin, This is an automated LMS Notification. Notification Type: [NOTICETYPE] Date: [DATE] Time: [TIME] Please find the following Report File attached:
	Implementation Implementation [REPORTFILE] Details: Report Type: [REPORTTYPE] Report Definition: [REPORTDEFINITION] Report Delivery: [REPORTDELIVERY] Delivered to Team: [REPORTTEAM]
	The next scheduled delivery will be on: Date: [REPORTNEXTDELIVERYDATE] Time: [REPORTNEXTDELIVERYTIME]
	Thank you, [PORTALNAME] [PORTALURL]

Email Template Type: Session - Delete.

This will send notifications regarding a Deletion of an ILT/VILT Session.

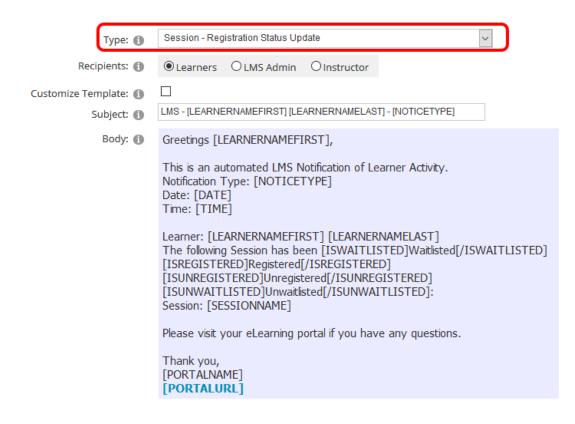
• **Recipients:** Learners or Instructor.

Туре: 🚳	Session - Delete
Recipients: 🕕	 Learners Instructor
Customize Template: 🕕	
Subject: 🕕	LMS - [LEARNERNAMEFIRST] [LEARNERNAMELAST] - [NOTICETYPE]
Body: 🕕	Greetings [LEARNERNAMEFIRST],
	This is an automated LMS Notification of Learner Activity. Notification Type: [NOTICETYPE]
	Learner: [LEARNERNAMEFIRST] [LEARNERNAMELAST]
	For the following Session: [SESSIONNAME]
	Please visit your eLearning portal if you have any questions.
	Thank you, [PORTALNAME] [PORTALURL]

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.

Type: 🕦	Session - Update
Recipients: (1)	Learners OInstructor
Customize Template: 🕦 Subject: 🚯	LMS - [LEARNERNAMEFIRST] [LEARNERNAMELAST] - [NOTICETYPE]
Body: 🕦	Greetings [LEARNERNAMEFIRST], This is an automated LMS Notification of Learner Activity. Notification Type: [NOTICETYPE] Date: [DATE] Time: [TIME] The Session [SESSIONNAME] has been updated. Reason: [SESSIONUPDATEREASON]
	Please visit your eLearning portal if you have any questions. Thank you, [PORTALNAME] [PORTALURL]

Email Template Type: **Start Date - Final Notice.**

Will send third and last notice of a Learning Role Start/Begin Date.

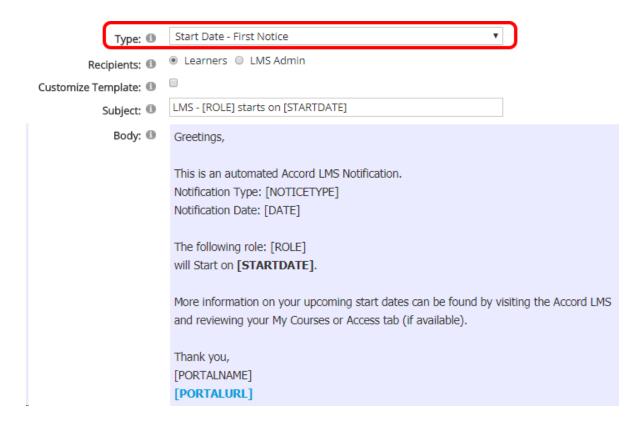
• Recipients: Learners or LMS Administrators.

Туре: 🕕	Start Date - Final Notice	
Recipients: 🕕	Learners LMS Admin LMS L	
Customize Template: 🕕	Reset to Default	
Subject: 🕕	LMS - [ROLE] starts on [STARTDATE]	
Body: 🕕		
	Greetings,	-
	This is an automated Accord LMS Notification.	
	Notification Type: [NOTICETYPE]	
	Notification Date: [DATE]	
	The following role: [ROLE]	
	will Start on [STARTDATE].	
	in our of formeron eli	
		-
	Design HTML	111.

Email Template Type: Start Date - First Notice.

Will send first notice of a Learning Role Start/Begin Date.

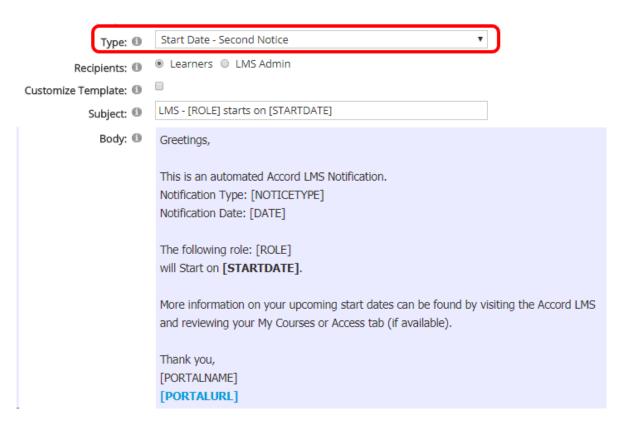
• **Recipients:** Learners or LMS Administrators.



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.

Access Code - Submit
Learners O LMS Admin
Reset to Default
LMS - [LEARNERNAMEFIRST] [LEARNERNAMELAST] - [NOTICETYPE]
X ℡ @ @ - ジ ≞ ☱ ⊟ ☱ ☱ ♡ - C - ⊑ ≝ 急 色
Font Name • Real • A • • • B $I \sqcup \equiv \equiv \equiv \equiv \checkmark \bullet$
Greetings [DISPLAYNAME],
This is an automated LMS Notification.
Notification Type: [NOTICETYPE]
Date: [DATE] Time: [TIME]
[IFROLESADDED] Your user account has been recently updated and includes access to the
following Security Role:
Cesign 🔇 HTML 🔍 Preview
View
Created: SuperUser Account on 4 March 2013 at 12:26 PM
Updated: SuperUser Account on 29 July 2013 at 10:48 AM

^

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 ", "

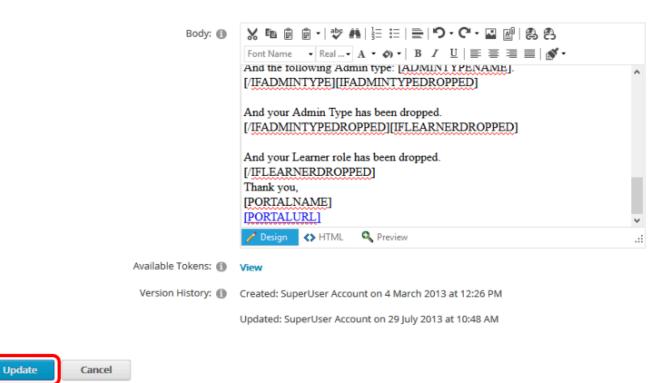
Report - Scheduled Delivery

[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**.

P		rd L	MS				🖼 🛛 LMS Administr	rator 🍄 Logout
Home	My Courses	Electives	Resource	es Transcrip	pt Community	ECommerce	LMS Admin	
Catalog	g Roles	Teams	Actions	Configuration)		Active Team: All Membe	ers 🔹
Config	uration							
(j)	General Options							
	Notifications							
	Folder Types							
Ø	Learning Elemen	t Formats						
1	Status Types							
	Education Activit	ies						
${\mathbb X}$	ILT Resources							
(-)	Role Based Redi	rection						
	Import Data							
P	Enhanced Featu	re Status						
*	Integration							
a second	License Key and	Details						

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.

Integration

• After creating the OpenSesame Marketplace, scroll near bottom and click **Update**.

OpenSesame Market	place		~
Accord LMS provides sea OpenSesame Plus – Cost	effective packaged bundle	ness DpenSesame course catalog. with access to over 4,000 of the most popular courses. rses. Flexible license options to meet any budget.	
	Account Name: * () Account ID: () Hide MarketPlace: ()		
Create			
Integrity Advocate Pr	octoring		>
Update Return			

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**.

Accord	🛛 🛛 SuperUser Account 🏹 Logo
Home My Courses Electives Resources Transcripts Community ELearning Sto	re LMS Admin UI Patterns
Catalog Roles Teams Actions Configuration	Active Team: All Members •
Catalog	
Copy To 🕶 Remove / Delete	0
My Catalog	
OpenSesame	>

For information on using the OpenSesame Marketplace to quickly add learning content to your Accord LMS Catalog, please reference; <u>OpenSesame - The Learning Marketplace</u>

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.

8 9	cco	rdı	.MS					🕿 🛛 LMS Administrator 🍄 Logout
Home	My Courses	Electives	Reso	urces	Transcript	Community	ECommerce	LMS Admin
Catalog	Roles	Teams	Actions	Config	uration			Active Team: All Members
Configu	ration							
()	General Option:	s						
	Notifications							
	Folder Types							
ø	Learning Eleme	nt Formats						
1	Status Types							
	Education Activi	ities						
\gg	ILT Resources							
-	Role Based Red	irection						
	Import Data							
1	Enhanced Featu	ure Status						
*	Integration							
all a	License Key and	d 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.

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.

Do not modify any parameter in the License Key box or it will disable the LMS.

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**.

P		ordi	MS				🜌 🛛 LMS Administrator 🍄 Logout
Home	My Courses	Electives	Resour	ces Transcrip	ot Community	ECommerce	LMS Admin
Catalo	g Roles	Teams	Actions	Configuration)		Active Team: All Members
Config	uration						
0	General Optio	ons					
	Notifications						
	Folder Types						
ø	Learning Elem	nent Formats					
1	Status Types						
	Education Acti	ivities					
>	ILT Resources						
-	Role Based Re	edirection					
	Import Data						
1	Enhanced Fea	iture Status					
*	Integration						
1 C	License Key ar	nd Details					

Once the Notifications Panel opens;

• Click on the **License Notifications** heading to open this section.

PAC	cco	ord	🛛 🕕 LMS Administrator	🍄 Logout				
Home M	ly Courses	Electives	Resource	ces Transcript	Community	ECommerce	LMS Admin	
Catalog	Roles	Teams	Actions	Configuration			Active Team: All Members	¥
Notificatio	ons							
General S	Settings							>
Learner N	Notificatio	ons						>
License N	lotificatio	ons						>
Email Ten	nplates							>
Update	Retur	m						

- 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 100	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	Туре	
	Final Notice	0	Days	~
	Second Notice	7	Days	\sim
	First Notice	30	Days	>
Email Addresses: 0	demo.test@acco	ordlms.con	n	

^

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 <u>Accord LMS Video</u> <u>Tutorials</u> 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.

My Courses Configuration	
My Courses ► LMS Learner Training	
LMS Learner Training	
40%	View More 日
This course demonstrates how to use the Accord LMS as a Learner. This course consists of 2 videos and a short quiz. Once you have passed the quiz, you wopen the certificate and print it for your records. Learning Objectives Be able	ill be able to
Community Features	Launch
C E Learner Experience	Launch
陀 🧪 LMS Learner Quiz	Launch
This is a SCORM compliant quiz that tests the basic knowledge of the Accord LMS Learner Features.	
Estimated Duration: 3 Min 0 Sec	
Activity Points for Successful Completion • 10.00 Points - LMS Learner Master • 15.00 Points - Workplace Conduct	
Accord Learner Training Workshop - WebEx Thu 15 Sep 2016, 1:00 AM - 2:00 AM GMT+12 Daylight Time	Sessions

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.

XXX	Acco	Badge awarded					
н	ome My Courses	Electives	Resources	Transcript	Community	ECommerce	Congratulations! LMS Learner Master badge awarded.
Му Со	urses 🕨 LMS Learner Trai	ning					See All Notifications
LMS Learner Training 100% Score: 35% View More This course demonstrates how to use the Accord LMS as a Learner. This course consists of 2 videos and a short quiz. Once you have passed the quiz, you will be able to open the certificate and print it for your records. Learning Objectives Be							
0	Learner Experien	се					Launch
0	Community Feat	Ires					Launch
0	Accord Learner T - Corporate Headqua Wed 7 Dec 2016, 9:	arters					Sessions

Wed 7 Dec 2016, 9:00 AM - 10:00 AM MST
 Assignment Upload
 UMS Learner Quiz
 Certificate of Completion
 Certificate

Search for Learning Q

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**.

Pccord LMS	🔤 🕢 LMS Administrator 🦓 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Configuration	
Ceneral Options	
Notifications	
Folder Types	
Model Learning Element Formats	
V Status Types	
Education Activities	
K ILT Resources	
Role Based Redirection	
import Data	
P Enhanced Feature Status	
Note: The second	
License Key and Details	

• Click on Add New Education Activity.

Education Activities

Edu	ication Activity List		\sim
	Name	Status	
	Education Units	Active	
[dd New Education Activity		

Return

- 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.

Education Activity Details

Education Activity Details		\checkmark
Name: * 🚯	Proper Workplace Conduct	
Status: 🕕	Active Inactive	
Gaming Activity: 🕕		
Description: 🚯		

Update	Cance

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**.

Piccord LMS			🛛 0 LMS Administrator	隆 Logout
Home My Courses Electives Reso	urces Transcript Community	ECommerce	LMS Admin	
Catalog Roles Teams Actions	Configuration		Active Team: All Members	•
Catalog Copy To Move To Rem Move To Move To Move To	ove / Delete			0
Bample - Accord LMS Content Sample - LMS Learner Training Sample - LMS Admin Training Sample - LMS Admin Training Sample - LMS Learner Resources Sample - SCORM Content				
 Proper Workplace Conduct Accord Plus Courses 	LE Details LE Conditions & Limits LE Completion Events LE Notifications Launch LE Learner List			

In the LE Details panel, scroll down and click on the **Education Activities** heading to open this section if necessary.

Presentation							
Upload SCORM compliant presentations or demonstrations.	pload SCORM compliant presentations or demonstrations.						
General Settings	>						
Advanced Settings	>						
Education Activities	>						
Update Delete Remove From Folder Cancel							

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.

Update

Delete

Remove From Folder

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**.

Education Activities		
Award Requirements: 🕕	Complete or Pass 🔹	
Education Units: 🖲		
Proper Workplace Conduct: 🕕	10	

Cancel

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.

Pace		S							
Home	Calendar	My Courses	Catalog	Resources	Transcripts	Community	LMS Admin	ECommerce	
	 CEU Test Test Quiz ASM PPT 	z - RB							
	 Rick's Tes Rick's Ot 	st Course							
	 Fire Safe E test ILT 	ty							
	🔺 🗆 👤 test ilt								
	🗆 📅 Ses 🗆 📅 Ses 💷 📅 Ses	sion 4	20 Jul	arters - Fri 31 Au 2018, 10:00 AM - g 2017, 7:00 PM -	11:00 AM MDT	- 8:00 PM EDT			
		sion 2 - test Corpo				/I - 8:00 PM EDT			

This will bring up the Session Roster.

• Under **Points** click on **View**.

Session Roster

Registered: 1	Waitlist: No						
Max Class: Unlimited							
Save Data Refresh Bulk Update Include Available Candidates Include Clipboard Candidates							
Drag a column header and drop it here to group by that column							
Username	First Name	Last Name	Status	Absent	Success	Score Points	Status Date
	T	T				T	
izmadmin	IZM	Admin	Completed 🔻		•	View	7/6/2018 1 🎟
H • 1 • H Pag	e Size: 20 🔻						1 items in 1 page
Save Data Refresh Bulk Update Include Available Candidates Include Clipboard Candidates							

This will bring up the current points awarded for any completed Education Activities.

Education Activitie	es			
Points				
		APA: 📵	3	<u>≜</u>
		ASWB:	3	
		NASW:	3	
Update	Cancel]		

- 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	<u>(</u>
		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.

Accord	🛛 🛛 LMS Administrator 🍄 Log
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
	Catalog
Catalog Roles Teams Actions Configuration	Enrollment bers 👻
	Teams
Catalog	Roles
	Configuration
Copy To • Move To • Remove / Delete	Charts
 ▲ □ My Catalog ▶ □ ■ Sample - Accord LMS Content 	Reports
Accord Plus Courses	Gaming
	Documentation
	Support
	Upload Manager

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.

									Logout
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin		
Gaming N	lechanics								
Activity Points	s Badges	Ad Hoc Assignm	ient						
Modul	e		Activi	ty Name			Activity Points	Once	Actions
LMS			Proper Worl	place Conduct			1	No	

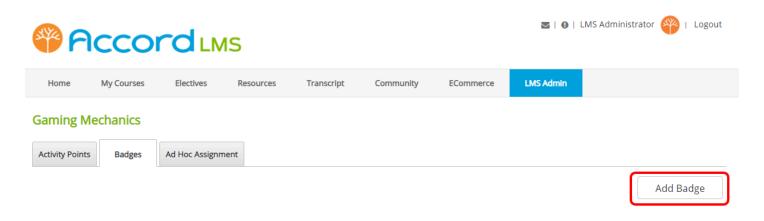
Badges

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.

8 8						≅∣0∣	LMS Administrator 平 Log	gout
Home	My Courses	Electives R	esources Transcript	Community	ECommerce	LMS Admin		
		Name Description						
		Expiration Period	Not ex	xpire	▼ reset selec	tion		
		Image	Folder Site R	oot e Specified> oad File				
			No	tivity Name records yet S > Proper Workplace Add		Points		
	Save	Cancel						

The new Badge will display in the list as shown in the example below.

Pccord LMS								LMS Administrato	or 🍄	Logout
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin			
Gaming M		Ad Hoc Assignm	nent						Add B	adge
Imag	je				Badge Name					Actions
Driver Safety Course								2 th		

Ad Hoc Assignment

You can also assign badges and points to a user by going to the **Ad Hoc Assignment** tab.

8 9	cco	🔤 🤂 Su	perUser Accoun	t 🍄 I	Logout					
Home	My Courses	Catalog	Resources	Transcript	Community	ECommerce	LMS Admin			
Gaming M		Ad Hoc Assig	mment						Add	Badge
Image				1	Badge Name					
3				Effe	ctive Communicator				1	11
8				U	MS Admin Master				1	
Ŕ				LM	MS Learner Master				1	

- 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	
2		Pdavidson	10	\bigcirc

- 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)	
	٨	Effective Communicator	22/06/2016 20:23		11
	Ĥ	LMS Learner Master	16/06/2016 16:05		
	LMS Adm	nin Master		•	
	Add				
_	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.

Module			
Module Settings	Permissions	Page Settings	DNNGamification Leaderboard Settings
	Template	Directory 🚯	LMS.Wide
		Mode 🚯	Friends Profile -
	Sho	w Paging 🕕 🛛	
	I	Page Size 🚯	5
Update Created By Superl	Delete	Cancel	2:13:52 PM Last Updated By IZM Admin On 3/3/2015 9:43:52 AM

Placement: Community > My Groups

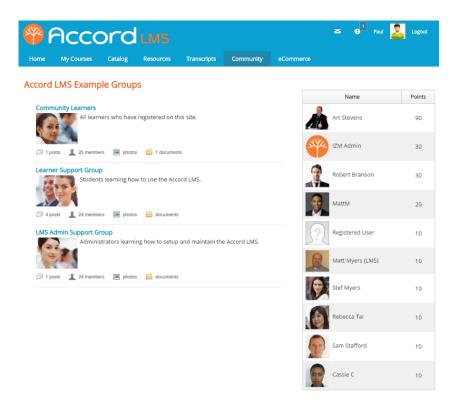
Module Settings

- **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.

P P	ccor	С	2	SuperUs	er Account	Logout		
Home My	Courses Cat	alog Resou	ces Transcripts	Community	eCommerce	LMS Admin		
Module								
Module Settings	Permissions	Page Settings	DNNGamification	Leaderboard Setting	s			
	Template	Directory 🚯	LMS.Narrow			-		
		Mode 🚯	All Users					
			All Obera			•		
	Sh	ow Paging 🚯						
		Page Size 🚯	10					
Update	Delete	Cancel						
Created By Super	rUser Account O	n 2/12/2015 12:	02:44 PM Last U	pdated By IZM Adn	nin On 3/3/2015	9:42:31 AM		

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.

Module			
Module Settings	Permissions	Page Settings	DNNGamification Profile Settings
	Template	Directory 🚯	LMS.Profile -
	s	how Chart 🚯	
Update	Delete	Cancel	
Created By Superl	Jser Account O	n 2/12/2015 12:	14:39 PM Last Updated By IZM Admin On 3/3/2015 9:58:59 AM

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.

P	cco	🗃 🖯 Paul 🔝 Logout					
Home My	Courses	Catalog	Resources	Transcripts	Community	eCommerce	
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Navigation				IZM Admin		30	84
My Groups Group Activity		_	(Robert Branson		30	884
Members			9	MattM		20	84
			<u>?</u>	Registered User		10	8

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**.

Module				
Module Settings	Permissions	Page Settings	DNNGamification Leaderboard Settings	
	Template	Directory 🚯	LMS.Wide ~	
		Mode 🚯	Friends Profile -	
	Sho	w Paging 🚯 [
	I	Page Size 🚯	5	
Update	Delete	Cancel		
Created By Superl	Jser Account O	n 2/12/2015 12	Last Updated By IZM Admin On 3/3/2015 9:43:52 AM	1

Learner View

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	_			Nar	ne	Poir	its	Recent Badges	
	-			IZM Admin		30)		
	My Account		$ \Omega $	Registered User		10)	8	
Navigat	ion		S.	IZM Admin			gistered User		
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Activity: Docume			Remove	Friend Follow	M	Remove Friend	Follow	M	
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Message	es		3?	******, *	*****				
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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.

P		ord	LMS			2	SuperUser Acco	unt <u> </u> Logout
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Modul	e							
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Update	Delete	Cano	el					
Created By Su	perUser Acco	unt On 2/12/	2015 12:14:39	PM Last Upd	lated By IZM Adn	nin On 3/3/2015	9:58:59 AM	

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.

🍄 F	JCCC	ord	LMS			M	SuperUse	er Account	2 Logout
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Module Sett	ings Permiss	ions Page	Settings DN	Gamification Pro	ofile Settings				
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Update Created By S	Delete uperUser Acco	Cance unt On 2/12/2		PM Last Upd	lated By IZM Adm	nin On 3/3/2015 !	9:58:59 AM		

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.

*	٩	ord	LMS				М	8 ¹	Paul	<u>.</u>	Logout
Home	My Courses	Catalog	Resources	Transcripts	Community	eCommerce					
Paul	My Account		Location Uruguay Ways To G	biography inforr iet In Touch aulg@mymail.con	nation from this u n	ser					
Navigat	ion		Activities			Badges					
Profile			Acti								
Activity Docume Friends Messag	ents		<u> </u>	Wee	k	Activity Points 10					

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.

Module				
Module Settings	Permissions	Page Settings	DNNGamification Profile Settings	
	Template	Directory 🚯	LMS.Transcipt -	
	Sh	ow Chart 🚯 🗌		
Update	Delete	Cancel		
Created By Superl	User Account O	n 2/12/2015 12	20:38 PM Last Updated By IZM Admin On 3/3/2015 10:05:01 AM	A

Learner View

The Profile module in the Transcript page will only show the badges that the user has assigned.

* F	Acco	ord	LMS				M	9 ¹	Paul 🤽 Logout
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Badges



The Learner Module

Learner Module - Introduction

The Learner Module allows you to configure the overall Learner presentation.

This is accomplished through the **Configuration** tab.

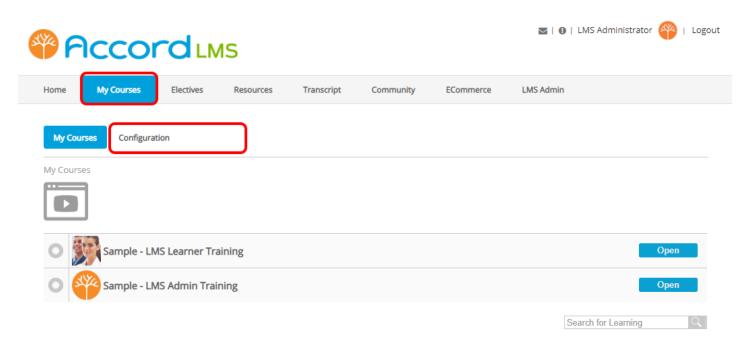
The **Configuration** tab will be visible in the Learner Module (**My Courses**) as long as the current Active Team has permission to access.

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.

Accord		ninistrator 🍄
Iome My Courses Electives Resource	es 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 >	
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Back Button Support: ()		
Use Popup For Mobile: ()		
Access and Tracking: ()	Current User Proxy User Proxy User	
interval (in seconds) to send extra commits: 📵	Proxy User Name:	
Calendar		
Electives		
Transcript		
Access		
Templates		

Update

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.

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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.

Accord LMS

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 <u>LMS Admin Types</u> 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.

PACCORD LMS

- **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.

For more information on the Proxy User feature, please read our Blog article: <u>Learner</u> <u>Module – Anonymous Access</u>.

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.

Pccord LMS		2	🛛 🕕 LMS Administrator 🍄 Logout
Home My Courses Electives Resources	Transcript Community	ECommerce LMS A	dmin
My Courses			
Sample - LMS Learner Training			Open
Sample - LMS Admin Training			Open Search for Learning

Scroll down and click on the Calendar heading to open this section.

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Admin Module: ()	LMS Admin -> LMS (503)	
Parent Folder: ()	< Show All Folders >	
Maximum Depth: @		
Show Tab Bar: (
Available Tabs: @	Dashboard	
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	Hide LE or Folder if prerequisite is not met	
	 Include Resources Include Unenrolled Content 	
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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.

Calendar		
Learner Module: 🚯	My Courses -> LMS Learner (505)	
Mode: 🕦	Calendar and List	
Maximum Height: 🕕	300	
Number of Days: 🚯	10	

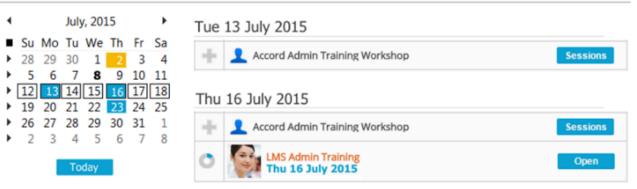
Accord LMS

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.

Calendar



Typical Calendar only image.

Calendar

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Announcements



Managing for Higher Performance

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New Learner Training Courses

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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.

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Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
My Courses My Courses	
O Sample - LMS Learner Training	Open
Sample - LMS Admin Training	Open
	Search for Learning

• Once in the Configuration tab, scroll down and click on the **Electives** heading to open this panel.

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Home My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin		
My Courses Configura	ation							
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Update								

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**.

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Learner Electives Enrollment: Always Assign to Current User Learner Electives Enrollment Redirection: My Courses	
Transcript	>
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Version History: 🕕 Created: SuperUser Account on 22 January 2018 at 3:21:35 PM

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.

	IS				🛛 🛛 LMS Ad	ministrator 🍄 Logout
Home My Courses Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
My Courses						
Sample - LMS Learner Tra	ining					Open
Sample - LMS Admin Trair						Open
					Search for	Learning

• Once in Configuration, scroll down to **Transcripts** and open it's panel by clicking on the heading.

ome My	Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
My Courses	Configuratio	n						
General Set	tings							>
Calendar								>
Electives								>
Transcript								>
Access								>
Templates								>
		Version H	listory: 🕕 Crea	ated: SuperUser A	ccount on 22 Janua	ary 2018 at 3:21:35	PM	

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.

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.

	Anistana - Di Pending - B	Adde III Expired	
	Section Company	R infragram R Sol.Mampini	
	0 Passed 1 R include and	Falad # Any Institution	
	included Deleters at all all all deleters	and i	
		Drough-Faiders intop level Dramarip	
	in Sate Regio @ All Time	*	
	or Data Nargar 😐 😐		
Learner Details			
2 Dar Same	11 Preliame	C Los Same	0 feat
Folder Details			
 Delas 	# Completion	× 500%	Duration
it top	# Completion Date	C SATURE	U LE Deterio
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R follow Type	# Success	O DATAGE	U ONO Kolbert
Profile Details			
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C Begraty	12 M	- Seet	II Preferred Time Zone
C celtroble	U SWEW	O CN	III wateried socale
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LE Details > Learner Activ			
A Darkers	II Prelitane	C Let Save	ii brai
LE Details > Learner Activ	ty: LE Details		
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	R bases	O Passing	D Comments
# Solder Type	11 Percet	C Ountien	II Manager Created Date
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# completion	U GAMAMA	O Time	D Approx
O Complete	D GAVING	O Advance	ik Scare
	ty: LE Details (Session Details		
2 Sealary Same	R Ind Late	C Tressure	D Location
16 Start Date	E End Time	C Attendance	II Instructor
C Start Time			
LE Details > Learner Activ	ty: LE Details (Profile Details)		
0 hetc	II Mechane	O grade	II Report
O Modemane	D company name	O Peoblesk	D country
0 1900	U rebote	O OM	U Postal Cade
C mapophy	D M	0 2046	D Preferred Time Zone
O CHEMAN	0 Toller	0.09	D. Preferred Locate
C for	II Sepre IO		
	er Activity: Question Details		
# the lare	U Frg.Name	C Lot Nome	ii Crol
	er Activity: Question Details (
O Learning Folder Path	U Type	ie Canad	D NAVA
8 Folder hame	K VONG	s neores	U Duration
	R secons	O Sunity	D Debi
	D Allenge	O Orlanson	D fore
LE Details > Score > Leve	er Activity: Question Details	Profile Details)	
II bele	II Telephone	C Unkedin	II Report
C Modelhame	 Delightere Company Name 	C Graate	E Region
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C supply C cutotoly	U M	0 2046	Professed Time Zone Professed Sociale
O celtropie	D Style ID	in ch	12 Professio Locale
	in white re-		
koess			

Image of sample transcript below.

A	ccor		IS				⊠∣0	LMS Administ	rator 🍄 I	Lo
lome	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin			
Transcript Refresh	Configuratio	n							ė	
User Name	Path			Folde	r Name	Folder Type	Completion	Completion Date	Success S	cor
maryjones	Sample - Accord	d LMS Content		Samp	le - LMS Learner Train	ing Course	Not Attempted			
maryjones	Sample - Accord	d LMS Content		Samp	le - LMS Admin Trainii	ng Course	Not Attempted			
maryjones	Sample - Accord Training	d LMS Content	> Sample - LMS A	dmin Intro	duction	Chapte	Not Attempted			
maryjones	Sample - Accord Training	d LMS Content	> Sample - LMS A	dmin Accor	d Academy Sample Le	ssons Chapte	Not Attempted			
maryjones	Sample - Accord Training	d LMS Content	> Sample - LMS A	dmin Admi Reso	n Documentation and urces	Chapte	Not Attempted			
marviones	Sample - Accord	d LMS Content		Samp	le - LMS Learner Reso	urces Folder	Not Attempted			
manyjonico										

Refresh

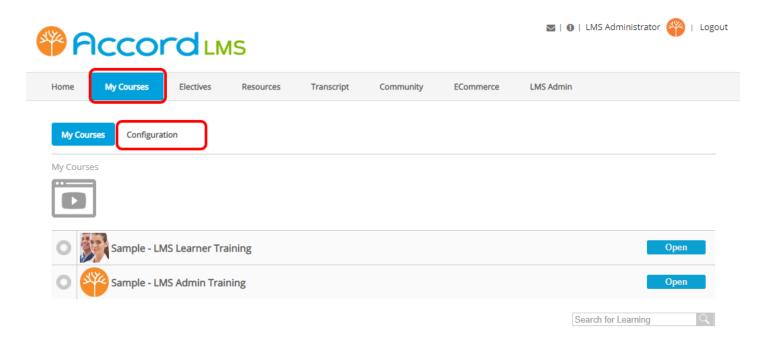
Access

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.

me My Courses Electives Resource	es 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: ()	0	
Show Active Learner: ()		
	* This Module © All Modules © Entire Page	
Back Button Support: ()		
Use Popup For Mobile: 📵		
Access and Tracking:	Proxy User	
	Proxy User Name:	
Interval (in seconds) to send extra commits: 📵	80	
Calendar		>
Electives		>
Transcript		· · · · · · · · · · · · · · · · · · ·
Access		
Templates		
Version History:	Created: SuperUser Account on 22 January 2018 at 3:21:35 I	2M

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.

ole Options						
		~				
	Show Roles: ()					
	Show Description:					
	Show Status: 🚯					
	Show Start Date: 🕕					
	Show Due Date: 🕕					
	Allow Public Unsubscribe: 📵					
A	llow Non-Public Unsubscribe: 🕕					
	Filter Roles By Group: 🕕	< Global Roles >			•	
Group	Name		Show	Count	Start	Due
Global Roles	Administrative Staff			0	Immediate	None
Slobal Roles	Unverified Users			1	Immediate	None
Slobal Roles	Warehouse Staff			0	Immediate	None
Slobal Roles	Warehouse Staff	×				
Slobel Roles	Warehouse Staff rm Submit Allow Form Submit: ()	×				
Slobel Roles	Warehouse Staff rm Submit Allow Form Submit: ()	8				
Slobel Roles	Warehouse Staff rm Submit Allow Form Submit: ()					
Globel Roles	Warehouse Staff rm Submit Allow Form Submit: () TP Submit					
Global Roles Global Roles ccess Code For	Warehouse Staff rm Submit Allow Form Submit: () TP Submit Post from Dynamic Form: () Submit Restrictions: ()	Portal				
Globel Roles	Warehouse Staff rm Submit Allow Form Submit: TP Submit Post from Dynamic Form:					
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Slobel Roles	Warehouse Staff rm Submit Allow Form Submit: () TP Submit Post from Dynamic Form: () Submit Restrictions: ()	Portal Post Get				
Slobel Roles	Warehouse Staff rm Submit Allow Form Submit: () TP Submit Post from Dynamic Form: () Submit Restrictions: () Enable HTTP Methods: ()	Portal Post Get Token:				

Version History: ④ Created: SuperUser Account on 22 January 2018 at 3:21:35 PM

Update

Accord LM5

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.

Pccord LMS	🔤 🕕 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Commun	ity ECommerce LMS Admin
My Courses My Courses	
Sample - LMS Learner Training	Open
Sample - LMS Admin Training	Open
	Search for Learning

Once inside Configuration, scroll down and click on the **Templates** heading to open this panel.

me My Courses Electives Resour	ces Transcript Community ECommerce	LMS Admin
My Courses Configuration		
General Settings		~
Learner Module ID: @		
Tab ID: @		
Admin Module: ()	7.5 LMS Admin -> LMS (503)	
Parent Folder: ()		
	< Show All Folders > *	
Maximum Depth: 📵		
Show Tab Bar: () Available Tabs: ()	Darbboard	
Available Tabs. (g	My Courses	
	Hide Expired Content Hide LE or Folder if prerequisite is not met	
	Include Resources Include Unenrolled Content	
	Include Unenrolled Content Resources Quicklink	
	Calendar	
	Electives Resources	
	Transcript	
	Access	
Maintain Drill Down State: () GoToWebinar / GoToTraining Trace: ()	0	
Attempts: @		
Show Active Team: @		
Show Active Learner: ()		
	This Module All Modules Entire Page	
Back Button Support: ()		
Use Popup For Mobile: 🌒	8	
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 P	M

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.

Templates		~
My Courses Template: 🕕	Default.Learner.lcon.MyCourses	T
Calendar Template: 🕕	Default Learner. Icon. Calendar	▼
Electives Template: 🕦	Default.Learner.lcon.Catalog	▼
Resources Template: ()	Default Learner Icon Resource	

Version History: 🕕 Created: SuperUser Account on 22 January 2018 at 3:21:35 PM



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.

Accord LMS

Here are the HTML and Tokens used for the Default.Learner.ListView.MyPlan LENode.htm:

[IFLISTVIEW]

<|i>

[/IFLISTVIEW]

[ICONLARGE]

```
[NAME]
```

```
40px;">[IFSCOREGRATERTHANZERO][SCORE%][/IFSCOREGRATERTHANZERO]
```

[STATUSICONLARGE]

[IFLISTVIEW]

</|i>

[/IFLISTVIEW]

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.

Remote site:	/HTTP/demo.accordlms.com/www/DesktopModules/Interzoic.AccordLMS/Templates/Default.Learner.I	ListView.MyPlan
	🖃 📲 Templates	
	🖶 🖓 Default.Learner.ListView.MyPlan	
Filename	Filesize	Filetype
II		
퉬 Images		File folder
🖲 Bottom.hf	m 10	Iron HTML
🔊 FolderNoo	le.htm 437	Iron HTML
🔊 Footer.htr	n 363	Iron HTML
🖻 Header.ht	m 91	Iron HTML
Treader.inc		
×	33	Iron HTML
Eeft.htm		Iron HTML Iron HTML
Ett.htm	tm 680	
Ett.htm	tm 680 .css 4.990	Iron HTML
Eft.htm CERNODE.htm	tm 680 .css 4.990 tt 404	Iron HTML Cascading

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.

More information on skins and templates included with the Accord LMS can be found by following this <u>Responsive Skin and Templates</u> 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.

Тор

• **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

Accord LMS

• **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.

	My Plan Configuration			
	Accord LMS Example Courses My Courses) Accord LMS Example Courses	Тор	My Plan Resources Transcripts	
		Header		
	O 📄 LMS Learner Training		Open	
	LMS Admin Training		Open	
Left		Footer	Search	Right
		Bottom		

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: <u>Learner UI Templates</u>.

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

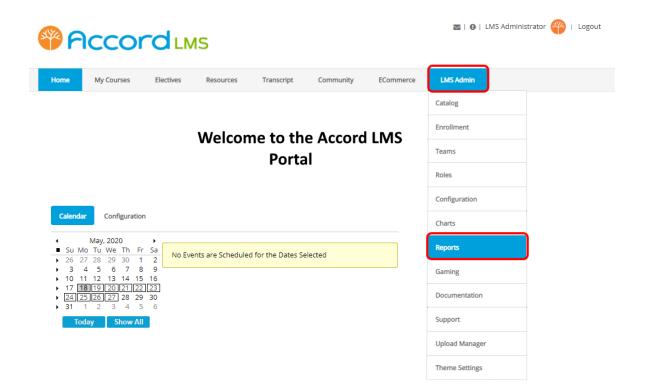
The Reports page is divided into three main sections; each section containing reports for specific kinds of utilization and activity.

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.

Activity Configuration		Active Team: All Members
k Reports		
<u>.</u>		
Easy Configuration		
LE Activity	< Define New Report > T Continue	
with Learner Detail		
ner Activity		
Reports grouped by Roles an	d Learners	
Learner Activity/Transcript	< Define New Report > Continu	e
with Folder Detail		
Learner Activity/Transcript	< Define New Report > Continu	e
with LE Detail		
Learner Activity/Score	< Define New Report > Continu	e
with Question Detail		
Learner Activity	< Define New Report > Continu	e
Most Active		-
Learner Activity	< Define New Report > Continu	e
Summary		-
Learner Accounts	< Define New Report > Continu	le l
with Profile Detail		
ming Content Utilization		
1		
Reports grouped by Folders	and Learning Elements	
Learning Folder	< Define New Report > Continu	e -
with Learner Detail		
Learning Folder Summary	< Define New Report > Continu	e -
with Folder Detail		
LE Utilization	< Define New Report >	e
with Learner Detail		
LE Utilization	< Define New Report > Continue	e l
Most Utilized		
Most Utilized	< Define New Report > T Continu	·

Learning Element Activity Quick Report

Three Easy Steps to Generate a Learning Element Activity Quick Report

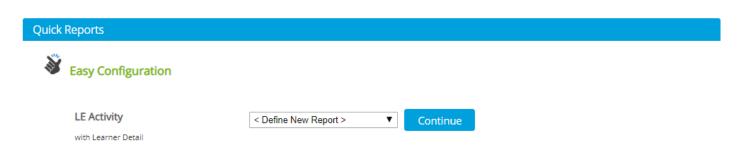
LE Activity Quick Reports: This is a report type which can be setup with 3 easy steps to gather data on selected Learning Elements (LE).

To Access LE Activity Quick Reports;

- Ensure the proper **Active Team** is selected.
- Wave over the LMS Admin tab.
- Click on Reports.

Pccord LMS	🛛 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
	Catalog
Welcome to the Accord LMS	Enrollment
Portal	Teams
	Roles
	Configuration
Calendar Configuration	Charts
May, 2020 Su Mo Tu We Th Fr Sa Zo 27 28 29 30 1 2 No Events are Scheduled for the Dates Selected	Reports
26 27 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16	Gaming
 17 18[19[20]21]22]23 24]25[26]27 28 29 30 31 1 2 3 4 5 6 	Documentation
Today Show All	Support
	Upload Manager
	Theme Settings

- 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**.

• 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.

ONTENT WILL APPEAR ON THIS	т	
		specific Learning Elements will include only those
ep three to select the time frame	is report.	
ep three to se	lect the time frame for th	lect the time frame for this report.

- 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**.

Reports » LE Activity Report

finitions				
Learners	Content	Date	Columns	
		ACTIVITY OCCU		
	0			occurred. When generating this report, you will receive all activity for the selected selected date range. Click the Generate button to run this report.
learners a	id learning elen	nents which occu		selected date range. Click the Generate button to run this report.
	_			
	Attemp	ot Date Range:	All Time	τ
enerate Repo	rt			
		Fund		
Export to PDI	Export to	Excel		

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.

Reports » LE Acti	vity Report			
Definitions				
Learners	Content	Date	Columns	

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.

P			IS				🛛 🕕 LMS Admir	nistrator 🍄 Logout
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
							Catalog	
			Welcon	ne to th	e Accorc	IIMS	Enrollment	
			Vercon	Porta			Teams	
							Roles	
							Configuration	
							Charts	
							Reports	
							Gaming	
							Documentation	
							Support	
							Upload Manager	
							Theme Settings	

The Report panel will open.

Scroll down to the section which reads Learner Activity.

Learner Activity Reports grouped by Roles and Learners

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.

Learner Activity

Reports grouped by Roles are Reports grouped by Reports grouped by	nd Learners		
Learner Activity/Transcript with Folder Detail	< Select Report Definition >	~	Continue
Learner Activity/Transcript with LE Detail	< Select Report Definition >	~	Continue
Learner Activity/Score with Question Detail	< Select Report Definition >	~	Continue
Learner Activity Most Active	< Select Report Definition >	~	Continue
Learner Activity Summary	< Define New Report >	~	Continue
Learner Accounts with Profile Detail	< Select Report Definition >	~	Continue

Filters

- **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 themres) 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**.

ers pecify the Filter settings used in the Report.			
Learning Catalog: * 🕲	All ● Selected Select / Unselect D ■ Sample - Accord LMS Content D ■ Accord Plus Courses		
Teams: * 🚯	All Members		
All Team Member Enrollment: 📵			
Learning Role Enrollment: * 🕕	All Roles Global		
Role Criteria: 🚯	O 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 🗸		
Completion Date Range: 🚯	Last 30 Days		
Export Format: ()	Report Viewer (on page)	~	

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.

Advanced Options		\sim
Folder Status: 🕚	Current and All Archivi 🗸	
Completion Status: 🕕	🗹 Complete 🗹 In Progress 🗹 Not Attempted	
Success Status: 🚯	○ Passed ○ Failed	
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.

Return

Select the columns you want to be presented in the resulting report by checking the appropriate box.

3	User Name	Last Name	Authorized	Portal Name
•	First Name	Email		
Fol	der Details			
	Team	Folder Name	Success	Duration
	Role	Folder Type	Score	LE Details
	Due Date	Completion	EA Name	Child Folders
		Completion Date	EA Value	
	Path file Details			
Pro		Telephone	Linkedin	Region
Pro	file Details		LinkedIn Facebook	Region Country
Pro	file Details Prefix	Telephone		-
	file Details Prefix Middle Name	Telephone Company Name	Facebook	Country
	file Details Prefix Middle Name Photo	Telephone Company Name Website	Facebook Unit	Country Postal Code Preferred Time Zone Preferred Locale

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.

eport Gener	ated: 1	/8/2016 11:5	4:02 AM									
Refresh											a	s 🖭 🖨
Drag a colum	n heade	r and drop it	here to group by th	hat col	umn.							
User Name	F	First Name	Last Name		Folder Name	Completion		Success		Score	LE Details	Child Folders
	T		T	T	T	All	• 7	All	• •	T		
Agray	A	Ashleigh	Gray		LMS Learner Training	In Progress					View	View
Arideout	A	Alexandra	Rideout		LMS Learner Training	In Progress					View	View
Bdavidson	E	Bryant	Davidson		LMS Learner Training	In Progress					View	View
Cdavidson	c	theese	Davidson		LMS Learner Training	In Progress					View	View
Cjong	c	andice	de'jong		LMS Learner Training	In Progress					View	View
Ddavidson	d	david	Davidson		LMS Learner Training	In Progress					View	View
Jdavidson	Je	ohn	Davidson		LMS Learner Training	In Progress					View	View
Jharris	J	oseph	Harris		LMS Learner Training	In Progress					View	View
Jhartley	Je	oshua	Hartley		LMS Learner Training	In Progress					View	View
Jmontero	je	ose	montero		LMS Learner Training	In Progress					View	View
Jshort	je	oseph	short		LMS Learner Training	In Progress					View	View
Karbuckle	ĸ	Kelsey	Arbuckle		LMS Learner Training	In Progress					View	View

Sample Learner Activity/Transcript: LE Detail drill down report for a selected Learner.

Previous Reports: Learner Activity/Transcript with LE Detail - Learning Folder: LMS Learner Training - User: cheese Davidson 🔽

Learner Activity/Transcript with LE Detail

Refresh								🍐 💥 🕎 🖨
Drag a column	head	der and drop it here	to group by that colum	n.				
User Name		Folder Name	LE Name	Completion	Success	Date	Time	Score
	Ŧ	T	T	All 🔻 🍸	All 🔻 🍸			
Cdavidson		LMS Learner Training	Learner Experience	Complete	Passed	2016.01.08	9:47:00 AM	98%
Cdavidson		LMS Learner Training	Community Features	Complete	Passed	2016.01.08	9:47:00 AM	98%
Cdavidson		LMS Learner Training	Accord Learner Training Workshop	Not Attempted				
Cdavidson		LMS Learner Training	Assignment Upload	Complete	Passed	2016.01.08	9:47:00 AM	98%
Cdavidson		LMS Learner Training	LMS Learner Quiz	Complete	Passed	2016.01.08	9:47:00 AM	98%
Cdavidson		LMS Learner Training	Certificate of Completion	Complete	Passed	2016.01.08	9:47:00 AM	98%
	- H	Page Size: 50	•					6 items in 1 page

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.

Learner Activity	

 Reports grouped by Roles al 	lu Learners		
Learner Activity/Transcript	< Select Report Definition >	~	Continue
with Folder Detail	< Select Report Definition >	~	Continue
With CL Detail	< Select Report Definition >	~	Continue
Learner Activity	< Select Report Definition >	~	Continue
Learner Activity	< Define New Report >	~	Continue
Learner Accounts	< Select Report Definition >	~	Continue

Filters

- 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 themres) 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**.

Learner Activity/Transcript with LE Detail Reports » Learner Activity/Transcript with LE Detail

efinitions		>
lters		\sim
Specify the Filter settings used in the Report.		
Learning Catalog: * 🕕	All ● Selected Select / Unselect D = Sample - Accord LMS Content D = Accord Plus Courses	
Teams: * 📵	All Members	
All Team Member Enrollment: 🕕 Learning Role Enrollment: * 🚯	All Roles Global	
Role Criteria: 📵	O Match All 🛛 🖲 Match Any	
Role Status: * 📵	Pending Active Expired	
Additional Enrollment: 🕕 Learners: 🕕	Individual Enrollment Unenrolled (with Attempts) Show Search	
Attempt Date Range: 🕕	Last 30 Days 🗸	
Export Format: 🚯	Report Viewer (on page)	
dvanced Options		>

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.

Advanced Options		\sim
Completion Status: 🕕	🗹 Complete 🗹 In Progress 🗹 Not Attempted	
Success Status: 🚯	○ Passed ○ Failed ● Any	
LE Attempts: 🚯	Last 🗸	
Include Archived Attempts: 🕚		
Include All Enrollment Attempts: 🚯		
Include Enrollment from Parent Teams: 🕚		
Include ID values in CSV: 🚯		
Portals: 🚯	All Portals	

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; <u>Grading a Learner Uploaded Assignment</u>

User Name	•	Last Name	Authorized	Portal Name
First Name		Email		
earning Eleme	ents			
Team	•	Complete	Points	Proctoring API Response
Role		In Progress	Possible	Comments
Due Date		Not Attempted	Passing	Comments From Learner
Learning Folde	er Path	Success	Duration	Manager Created Date
Folder Name		Passed	Date	Created By
Folder Type		Failed	Time	Assignment
🗹 LE Name	•	EA Name	Reference	Assignment Grading
Completion	0	EA Value	Proctoring Status	Score
Session Name Start Date			Timezone Attendance	Location Instructor
ession Details				
		End Time	Attendance	Instructor
Start Time				
Profile Details				
		Telephone	Linkedin	Region
Prefix				Country
PrefixMiddle Name		Company Name	Facebook	
			Facebook Unit	Postal Code
Middle Name	0	Website		
 Middle Name Photo 		Website IM	🗆 Unit	Postal Code

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/Transcript with LE Detail

Refresh											
-	nd drop it here to group by that colu										
Jser Name	Folder Name	LE Name	Completion	Success	Date	Time	Score				
Ţ	T	T	All 🔻 T	All 🔻 🍸							
rmadmin	LMS Learner Training	Learner Experience	Complete	Passed	2016.05.12	4:20:00 PM	45%				
tmadmin	LMS Learner Training	Community Features	Complete	Passed	2016.05.12	4:20:00 PM	45%				
madmin	LMS Learner Training	Assignment Upload	Complete	Passed	2016.05.12	4:20:00 PM	45%				
madmin	LMS Learner Training	LMS Learner Quiz	Complete	Passed	2016.05.12	4:20:00 PM	45%				
madmin	LMS Learner Training	Certificate of Completion	Complete	Passed	2016.05.12	4:20:00 PM	45%				
msadmin	LMS Learner Training	Learner Experience	Complete	Passed	2016.05.12	4:20:00 PM	45%				
msadmin	LMS Learner Training	Community Features	Complete	Passed	2016.05.12	4:20:00 PM	45%				
msadmin	LMS Learner Training	Assignment Upload	Complete	Passed	2016.05.12	4:20:00 PM	45%				
msadmin	LMS Learner Training	LMS Learner Quiz	Complete	Passed	2016.05.12	4:20:00 PM	45%				
msadmin	LMS Learner Training	Certificate of Completion	Complete	Passed	2016.05.12	4:20:00 PM	45%				
ortaladmin	LMS Learner Training	Learner Experience	Complete	Passed	2016.05.12	4:20:00 PM	45%				
ortaladmin	LMS Learner Training	Community Features	Complete	Passed	2016.05.12	4:20:00 PM	45%				
ortaladmin	LMS Learner Training	Assignment Upload	Complete	Passed	2016.05.12	4:20:00 PM	45%				
ortaladmin	LMS Learner Training	LMS Learner Quiz	Complete	Passed	2016.05.12	4:20:00 PM	45%				
ortaladmin	LMS Learner Training	Certificate of Completion	Complete	Passed	2016.05.12	4:20:00 PM	45%				
eguser	LMS Learner Training	Learner Experience	Complete	Passed	2016.05.12	4:20:00 PM	45%				
eguser	LMS Learner Training	Community Features	Complete	Passed	2016.05.12	4:20:00 PM	45%				
eguser	LMS Learner Training	Assignment Upload	Complete	Passed	2016.05.12	4:20:00 PM	45%				
eguser	LMS Learner Training	LMS Learner Quiz	Complete	Passed	2016.05.12	4:20:00 PM	45%				
eguser	LMS Learner Training	Certificate of Completion	Complete	Passed	2016.05.12	4:20:00 PM	45%				
K (1) H	Page Size: 50 👻						20 items in				

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/Transcript with LE Detail

Date Range: Last 30 Days Report Generated: 6/5/2018 11:14:39 AM

Refresh

Drag a column he	ader and drop it h	nere to group by that	column.					
User Name	First Name	Team	Folder Name	LE Name	Completion	Complete	Date	Assignment
T	T	T T	T	T	T	T		
aahmednafea	Ahmed	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
aimfeld	Alice	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
alasmi	Azzedine	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
alpha_guest	alpha	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
alpha_guest	alpha	MM Child	Houston Office	Learner Assignment Upload	Not Attempted			
AMarquez	Alex	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
AMarquez	Alex	RB	Houston Office	Learner Assignment Upload	Not Attempted			
AMarquez	Alex	Test Agency 1	Houston Office	Learner Assignment Upload	Not Attempted			
AMarquez	Alex	Test Agency 2	Houston Office	Learner Assignment Upload	Not Attempted			
bfalb	Bruce	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
bfleming	Brad	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
chlessing	Chuck	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
RLJPeterson	Robert	All Members	Houston Office	Learner Assignment Upload	In Progress		2018.06.05	New Office Building
rpape	Ron	All Members	Houston Office	Learner Assignment Upload	Not Attempted			· · ·
rpape	Ron	RB	Houston Office	Learner Assignment Upload	Not Attempted			
RRobinettJohnson	Robyn	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
RRobinettJohnson	Robyn	RB	Houston Office	Learner Assignment Upload	Not Attempted			
rsaunders	Randy	All Members	Houston Office	Learner Assignment Upload	Not Attempted			
				and the second sec				

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.

Learne	er Activity								
<u>, 9</u>	Reports grouped by Roles and Learners								
	Learner Activity/Transcript with Folder Detail	< Select Report Definition >	~	Continue					
	Learner Activity/Transcript with LE Detail	< Select Report Definition >	~	Continue					
	Learner Activity/Score with Question Detail	< Select Report Definition >	~	Continue					
	Learner Activity Most Active	< Select Report Definition >	~	Continue					
	Learner Activity Summary	< Define New Report >	~	Continue					
	Learner Accounts with Profile Detail	< Select Report Definition >	~	Continue					

Filters

- 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 multiple Roles/Learners.
- Role Status: Check the box next to the applicable Role Status: Pending, Active or Expired.

Accord LMS

- 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**.

Definitions		>
Filters		\sim
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: 🚯	O Match All 🔹 Match Any	
	🗌 Pending 🗹 Active 🗌 Expired	
	Individual Enrollment Unenrolled (with Attempts)	
Learners: 🕕	Show Search	
Attempt Date Range: 🚯	Last 30 Days 🗸	
Export Format: 🚯	Report Viewer (on page)	

Advanced Options

- **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.

Advanced Options		\sim
	 ✓ Complete ✓ In Progress ○ Passed ○ Failed ● Any Last ✓ 	
Include Archived Attempts: ① Include All Enrollment Attempts: ①		
Include Enrollment from Parent Teams: 🕦		
Portals: 🕦	All Portals	
	Documentation	

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.

Learner Details			
User Name	Last Name	Authorized	Portal Name
First Name	Email		
Question Details			
Learning Folder Path	🛛 Туре	Correct	□ Value
Folder Name	Answer	Incorrect	Duration
LE Name	Response	Survey	Date
Question	Attempt	Unknown	Time
Profile Details			
Prefix	Telephone	LinkedIn	Region
Middle Name	Company Name	Facebook	Country
D 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.

Refresh									🎍 🖉 🗒 🖨
Drag a column h	eader and drop	it here to group l	by that column						
User Name	Question	Туре	Answer	Response	Correct	Incorrect	Date	Time	Attempt
		T			T	T	- T		T
Agray	1 - Accord LMS Learner Experience:	choice	3 d All of the above	3 d All of the above	1		2015.02.04	8:03:02 AM	1
Agray	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		2015.02.04	8:03:02 AM	1
Agray	3 - Clicking on a Folder or Learning Element name will reveal more details about the content.	choice	1 True	1 True	1		2015.02.04	8:03:02 AM	1
Agray	4 - A Learner can share ideas, pictures and videos with their Team Members and Learning Groups.	choice	1 True	1 True	1		2015.02.04	8:03:02 AM	1

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.

Learner Activity

Reports grouped by Roles an	d Learners		
Learner Activity/Transcript with Folder Detail	< Select Report Definition >	~	Continue
Learner Activity/Transcript with LE Detail	< Select Report Definition >	~	Continue
Learner Activity/Score with Question Detail	< Select Report Definition >	~	Continue
Learner Activity Most Active	< Select Report Definition >	~	Continue
Learner Activity Summary	< Define New Report >	~	Continue
Learner Accounts with Profile Detail	< Select Report Definition >	~	Continue

Filters

- **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		\sim
Specify the Filter settings used in the Report.		
Learning Catalog: * 🕕	 All Select d Select / Unselect Sample - Accord LMS Content Sample - 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: 🕦	O Match All 🗕 Match Any	
Role Status: * 🚯	□ Pending Z 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

- 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		\sim
Completion Status: 📵	🗹 Complete 🗹 In Progress 🗹 Not Attempted	
Success Status: 🕕	O Passed O Failed	
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.

DIS	splay Columns					\sim
Gei	neral 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			
	file Details Prefix		Telephone		LinkedIn	Region
	Prefix				LinkedIn Facebook	Region Country
	Prefix Middle Name		Company Name			-
	Prefix Middle Name Photo		Company Name Website		Facebook	Country
	Prefix Middle Name Photo Biography		Company Name Website IM		Facebook Unit	Country Postal Code

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.

	/2017 4:06:24 PM							
Refresh								Ja 🗄
Drag a column header a	nd drop it here to group by	that column.						
User Name	First Name	Last Name		Email	Attempt	Complete	In Progress	Not Attempted
T		T	T	T	T	T	T	T
izmadmin	IZM	Admin		pablo.guigou@accordlms.com	2	2		18
Agray	Ashleigh	Gray		sample@sample.com				21
alsimmons	AI	Simmons		simmons1@sample.com				39
Arideout	Alexandra	Rideout		sample@sample.com				21
Bdavidson	Bryant	Davidson		sample@sample.com5				21
Cdavidson	cheese	Davidson		sample@sample.com10				21
Cjong	candice	de'jong		sample@sample.com14				21
Ddavidson	david	Davidson		sample@sample.com				21
hkissinger	Henry	Kissinger		sample@email.com				27
James	James	Labrie		james@esta.com				27
Jdavidson	John	Davidson		sample@sample.com8				21
JDoe	John	Doe		johndoe@sample.com				21
jfitz	John	Fitzgerald		jfitz@myemail.com				47
Iharris	Joseph	Harris		sample@sample.com				21
Ihartley	Joshua	Hartley		sample@sample.com13				21
Imontero	iose	montero		sample@sample.com17				21

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.

Learner Activity

 Reports grouped by Roles and 	u Learners		
Learner Activity/Transcript	< Select Report Definition >	~	Continue
with Folder Detail			
Learner Activity/Transcript	< Select Report Definition >	~	Continue
with LE Detail	-		
Learner Activity/Score	< Select Report Definition >	~	Continue
with Question Detail			
Learner Activity	< Select Report Definition >	~	Continue
Most Active			
Learner Activity	< Define New Report >	~	Continue
Summary			Continue
Learner Accounts	< Colort Depart Definition >		Continue
with Profile Detail	< Select Report Definition >	~	Continue

Filters

- **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**.

Learner Activity: Summary

Reports » Learner Activity: Summary

Definitions		>
Filters		\sim
Specify the Filter settings used in the Report.		
Learning Catalog: * 🕕	 All Selected Select / Unselect Sample - Accord LMS Content Maccord 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: 🚯	O Match All 🔹 Match Any	
Role Status: * 🚯	Pending Z 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

- 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.

Advanced Options		\sim
Folder Status: 🕕	Current and All Archiv	
Completion Status: 🕦	🗹 Complete 🗹 In Progress 🗹 Not Attempted	
Success Status: 🕕	O Passed O Failed 🖲 Any	
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.

- 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.

Display Columns				\sim
Learner Details				
User Name	Last Name	Authorized	Portal Name	
First Name	Email			
Report Details				
Folder Type	Not Attempted	Completed	Folder Details	
Enrolled	In Progress			
Profile Details				
Prefix	Telephone	LinkedIn	Region	
Middle Name	Company Name	Facebook	Country	
D 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 as shown below.

Refresh	8	j 🗾 🔒
)rag a column header and drop it here to group by that c	lumn.	
User Name	Enrolled	
T	T	
Agray	1	
Arideout	1	
Bdavidson	1	
Edavidson	1	
Cjong	1	
Ddavidson	1	
davidson	1	
harris	1	
hartley	1	
montero	1	
short	1	
Garbuckle	1	
Mstarkweather	1	
Inelson	1	
Idavidson	1	
Pdavidson	1	
davidson	1	
murray	1	
I I ► I Page Size: 50	18 items	in 1 pag

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.

Learner Activity
Reports grouped by Roles and Learners

Learner Activity/Transcript	< Select Report Definition >	~	Continue
with Folder Detail			
Learner Activity/Transcript	< Select Report Definition >	~	Continue
with LE Detail			
Learner Activity/Score	< Select Report Definition >	~	Continue
with Question Detail			
Learner Activity	< Select Report Definition >	~	Continue
Most Active			
Learner Activity	< Define New Report >	~	Continue
Summary			
Learner Accounts	< Select Report Definition >		Continue
with Profile Detail	Coloct Report Deminion /		continue

Filters

- **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 themres) 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.

Learner Accounts with Profile Detail

Reports » Learner Accounts with Profile Detail

Definitions		>
Filters		\sim
Specify the Filter settings used in the Report.		
Teams: * 🕚 Learning Role Enrollment: * 🕚	 All Members All Roles Global Roles Boston-North Office LMS Example Learning Roles Translation Roles 	
Role Status: * () Learners: ()	 ○ Match All ● Match Any ○ Pending ✓ Active ○ Expired Show Search 	
Created Date: ① Last Login Date: ① Export Format: ①	Last 30 Days All Time Report Viewer (on page)	

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.

Advanced Options		\sim
Include Enrollment from Parent Teams: 🕕		
Portals: 🚯	All Portals	
	Documentation	

Display Columns

- 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.

Learner Details				
User Name	Email		Authorized	Role
First Name	Created Date		Portal Name	Due Date
Last Name	Last Login Date		Team	Admin Type
Display Name				
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.

0 Davis						
: 5/22/2018 9:04:43 PM						
						یا 🛃 🏹
						22
ader and drop it here to group h	w that column					
	·	HireDate	Street	City	Country	Telephone
		T			T	
test@accordlms.com	2018.05.18_12.49					
aahmednafea@test.com.fake	2015.07.23_12.24				222	
aimfeld@test.com.fake	2015.11.12_14.58	11/01/2016 00:00:00			1	
alasmi@test.com.fake	2016.01.13_15.25					
tstokely@gmx.com.fake	2015.06.19_12.58					
test@accordlms.com	2017.07.06 11.27					
anewman@test.com.fake	2016.02.25_13.22					
bbeerman@test.com.fake	2015.11.18 08.32					
bbish@test.com.fake	2015.05.08_10.16					
tstokely@gmail.com.fake	2014.09.23_14.50					
	_					
	Email test@accordIms.com ahmednafea@test.com.fake aimfeld@test.com.fake tstokely@gmx.com.fake test@accordIms.com anewman@test.com.fake bbeerman@test.com.fake bbeerman@test.com.fake bbeerman@test.com.fake bbeerman@test.com.fake bbest@accordIms.com anewman@test.com.fake bbeerman@test.com.fake bbest@accordIms.com anewman@test.com.fake bbest@accordIms.com anewman@tes	solution is a series of the second series in the second series of the second second series of the second second series of the second series of the second second second series of the second se	solution 5/22/2018 9:04:43 PM ader and drop it here to group by that column. Email Created Date HireDate imfeld@test.com.fake 2018.05.18_12.49 ahmednafea@test.com.fake 2015.07.23_12.24 aimfeld@test.com.fake 2015.01.12_14.58 absmi@test.com.fake 2015.06.19_12.58 test@accordIms.com 2017.07.06_11.27 andmednafea@test.com.fake 2015.01.2_1.3.22 bbeerman@test.com.fake 2015.01.18_08.32 bbish@test.com.fake 2015.01.16	Sy22/2018 9:04:43 PM tader and drop it here to group by that column. Email Created Date HireDate Street Image: Image	s/22/2018 9:04:43 PM tader and drop it here to group by that column. Email Created Date HireDate Street City Test@accordIms.com 2018.05.18_12.49 aahmednafea@test.com.fake 2015.07.23_12.24 aimfeld@test.com.fake 2015.11.12_14.58 11/01/2016 00:00:00 alasmi@test.com.fake 2015.06.19_12.58 test@accordIms.com 2017.07.06_11.27 anewman@test.com.fake 2015.06.19_12.58 test@accordIms.com 2017.07.06_11.27 anewman@test.com.fake 2015.01.18_08.32 bbeerman@test.com.fake 2015.01.16	s/22/2018 9:04:43 PM tader and drop it here to group by that column. Email Created Date HireDate Street City Country test@accordIms.com 2018.05.18_12.49 aahmednafea@test.com.fake 2015.07.23_12.24 222 aimfeld@test.com.fake 2015.11.12_14.58 11/01/2016 00:00:00 alasmi@test.com.fake 2015.06.19_12.58 test@accordIms.com 2017.07.06_11.27 anewman@test.com.fake 2015.06.19_12.58 test@accordIms.com 2017.07.06_11.27 anewman@test.com.fake 2015.11.18_08.32 bbeerman@test.com.fake 2015.06.39_10.16

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

Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin		
							Catalog		
			Welcom	e to the	e Accord	IMS	Enrollment		
			Welcom	Porta		LIVIS	Teams		
					-		Roles		
							Configuration		
Calendar	Configuration						Charts		
Su Mo	lay, 2020 Tu We Th Fr 28 29 30 1	Sa No Eve	nts are Scheduled	for the Dates Sel	ected		Reports		
► 3 4 ► 10 11	5 6 7 8 12 13 14 15	9					Gaming		
		23 30 6					Documentation		
Today		0					Support		
							Upload Manager		
							Theme Settings		

• Scroll down to Learning Content Utilization.

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 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.



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.

• Select which **Folders** will be used to obtain the data for the Report.

Learning Folder with Learner Detail	Active Team: All Members 🔹
Reports » Learning Folder with Learner Detail Definitions	~
Filters	C
Specify the Filter settings used in the Report.	
Folders: * ③ Teams: * ③ All Team Member Enrollment: ③ Learning Role Enrollment: * ④	< Select a Folder > Select a Folder > LMS Learner Training CopenSesame New Employee Orientation LMS Learning Roles New Learners Social Groups Translation Roles
Role Criteria: ① Role Status: ★ ① Additional Enrollment: ①	 Match All Match Any Pending Active Expired Individual Enrollment
Learners: 🛈	Show Search

• Teams: Select all Teams by checking box next to All Members or select specific Teams.

Learning Folder with Learner Detail	Active Team: All Members 🔹
Reports » Learning Folder with Learner Detail	
Definitions	~
Filters	^
Specify the Filter settings used in the Report.	
Folders: * Teams: * All Team Member Enrollment: Learning Role Enrollment: *	LMS Learner Training ▼ All Members ▼ All Roles ■ Global Roles ■ LMS Example Roles ■ LMS Learning Roles ■ New Learners ■ Social Groups ■ Translation Roles ■
Role Criteria: 🕕 Role Status: * 🕕 Additional Enrollment: 🜗	 Match All Match Any Pending Active Expired Individual Enrollment
Learners: 🕕	Show Search

- 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.

Learning Fold	er with Learner Detail			Active Team: All Members	•
Reports » Learning	Folder with Learner Detail				
Definitions					~
Filters					
Specify the Filter s	ettings used in the Report.				
	Folders: * 🗊	LMS Learner Training		T	
		All Members			
	All Team Member Enrollment: ①	 All Roles All Roles Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles 			
	Role Criteria: 🕕	Match All Match Ar	-		
	Role Status: * 🕕	Pending Active Individual Enrollment	Expired		
	Additional Enrollment: 🕕 Learners: 🕕	Show Search			

• **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

Accord LMS

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.

Filters	^
Specify the Filter settings used in the Report.	
Folders: * ④ Teams: * ④ All Team Member Enrollment: ④ Learning Role Enrollment: * ④	LMS Learner Training ▼ All Members ▼ All Roles ■ Global Roles ■ LMS Example Roles ■ LMS Learning Roles ■ New Learners ■ Social Groups ■ Translation Roles ■
Role Criteria: Role Status: * Additional Enrollment: Learners: Attempt Date Range:	 Match All Match Any Pending Active Expired Individual Enrollment Show Search Last 30 Days •
Export Format: 💷	Report Viewer (on page)

• Learners: Click Show Search to display the search options.

Filters	
Specify the Filter settings used in the Report.	
Folders: * 🕕	LMS Learner Training
Teams: * 🕕	All Members
All Team Member Enrollment: 🕕	8
Learning Role Enrollment: * 🕕	 All Roles Ø Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles
Role Criteria: 🕕	Match All Match Any
Role Status: * 🕕	Pending Active Expired
Additional Enrollment: 🔍	Individual Enrollment
Learners: 🛈	Show Search
Attempt Date Range: 🕕	Last 30 Days
Export Format: 📵	Report Viewer (on page)

• Use this field to search for **specific Learners** within the selected Learning Roles.

Learners: 🛈	Hide Search	
Search String: 🕕	davidson	
Search Field: 📵	User Name 🔻	
Sort Order: 📵	User Name 🔻	
	Search for Learners	
	Select / Unselect	Learner List (7)
	Bdavidson [Bryant Davidson]	
	Cdavidson [cheese Davidson]	
	Ddavidson [david Davidson]	
	Jdavidson [John Davidson]	
	Odavidson [Osvald Davidson]	
	Pdavidson [pato Davidson]	
	Sdavidson [Serge Davidson]	

• Attempt Date Range: Allows you to apply a Filter with a given Date Range.

Attempt Date Range: 🕲 Export Format: 🕲	Last 30 Days All Time Today Yesterday	•
Advanced Options	This Week Last 7 Days	~
Display Columns	Last Week This Month Last 30 Days	~
Generate Report	Last 30 Days Last Month Custom Calendar	

• Export Format: Select a Report output option. Use All Column Raw CSV (comma delimited) for large data-sets.

Attempt Date Range: 🕕	Last 30 Days 🔹	
Export Format: 🕕	Report Viewer (on page)	
	Report Viewer (on page)	
Advanced Ontions	Acrobat (PDF) file	
Advanced Options	Excel Worksheet	
	CSV (comma delimited)	J
Display Columns		

Generate Report

• Advanced Options: Click the down arrow to display the Advanced Options.

	Attempt Date Range: 🕕	Last 30 Days	Ŧ		
	Export Format: 📵	Report Viewer (on page)		v	
Advanced Options					v
Display Columns					*
Generate Report					

- 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.

PACCORD LMS

- **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.

Advanced Options	^
Folder Attempts: 🕕	Current and All Archive
Completion Status: 🕕	🗹 Complete 🗹 In Progress 🗹 Not Attempted
Success Status: 🕕	Passed Saled Any
Due Date Range: 🕕	All Time 🔹
LE Attempts (for LE Details): 🕕	Last 🔹
Include Enrollment from Parent Teams: 🕕	2
Portals: 🕕	All Portals
	Accord LMS Documentation Portal

• **Display Columns:** Click the down arrow to display this section.

Advanced Options	^
Folder Attempts: 🕕	Current and All Archive
Completion Status: 🕕	Complete In Progress Not Attempted
Success Status: 🕕	Passed Failed Any
Due Date Range: 🕕	All Time 🔹
LE Attempts (for LE Details): 🕕	Last 🔹
Include Enrollment from Parent Teams: 🕕	2
Portals: 🕕	All Portals
	Accord LMS Documentation Portal
Display Columns	<u>~</u>
Generate Report	

• 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	Ø	Success	Ø	Learning Elements			
Email		Due Date		Score					
Profile Details	Profile Details								
Prefix		City		Cell		PreferredTimeZone			
MiddleName		Region		Fax		TimeZone			
Suffix		Country		Website		PreferredLocale			
🗆 Unit		PostalCode		IM		Photo			
Street		Telephone		Biography					

~

Return	

Generate 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.

Display Columns										
Re	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					
Pro	Profile Details									
	Prefix		City		Cell		PreferredTimeZone			
	MiddleName		Region		Fax		TimeZone			
	Suffix		Country		Website		PreferredLocale			
	Unit		PostalCode		IM		Photo			
	Street		Telephone		Biography					
Generate Report										

• Click the **View** link in the **Learning Elements** column to view report details for a selected Learner.

Return

Learning Folder with Learner Detail

Date Range: All Time Report Generated: 10/13/2017 2:02:50 PM

Drag a column header and drop it here t	to group by that column	1.					
User Name	Completion	Completion Date	Success		Score	Last Attempt	Learning Elements
T	T			T	T		_
izmadmin	In Progress					2099.10.05	View
zmadmin	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
msadmin	In Progress					2017.07.17	View
msadmin	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
Image: H Image: H Image: Page Size: 100 →							75 items in 1 page

• Use the **Previous Reports** drop-down menu to go back to a previous report.

earner Activity	y/Tra	nscript with LE Detail					
ate Range: All Ti							
eport Generated	d: 10/	13/2017 2:14:58 PM					
Refresh							
Drag a column h	neade	r and drop it here to grou	up by that column.				
User Name		Course	Folder Type	LE Name	Completion	Success	Score
	T	T	T	T		T	T
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%
Vnelson		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%
Inelson		LMS Learner Training	Folder	LMS Learner Quiz	Complete	Passed	90%
Nnelson		LMS Learner Training	Folder	LMS Learner Quiz	Complete	Passed	100%
Inelson		LMS Learner Training	Folder	LMS Learner Quiz	Complete	Passed	90%
Nnelson		LMS Learner Training	Folder	Vimeo/Youtube video	Not Attempted	d	
Nnelson		LMS Learner Training	Folder	BTOS Certificate of compl	etion None		
H - 1 - H	P	age Size: 100 🔻					31 items in 1 pag

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.

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.

Filters		
Specify the Filter settings used in the Report.		
Learning Catalog: * 🕄	 All Selected Select / Unselect LMS Learner Training LMS Admin Training OpenSesame New Employee Orientation 	
Teams: * 🕕	All Members	
All Team Member Enrollment: 🕕		
Learning Role Enrollment: * 🕕	 All Roles Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles 	
Role Criteria: 🕕	Match All Match Any	
Role Status: * 🕕	Pending Active Expired	
Additional Enrollment: 🗐	Individual Enrollment	

• Teams: Select all Teams by checking box next to All Members or select specific Teams.

Filters	^
Specify the Filter settings used in the Report.	
Learning Catalog: * 🗊 Teams: * 🗊	 All Select / Unselect LMS Learner Training LMS Admin Training OpenSesame New Employee Orientation All Members
All Team Member Enrollment:	
Learning Role Enrollment: * 🕕	 All Roles Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles
Role Criteria: 🕕	Match All Match Any
Role Status: * 🗐 Additional Enrollment: 🗐	Pending Active Expired Individual Enrollment

- 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.

Filters

Specify the Filter s	ettings used in the Report.	
	Learning Catalog: * 🗐	 All Selected Select / Unselect LMS Learner Training LMS Admin Training OpenSesame New Employee Orientation
	Teams: * 📵	🕨 🖉 All Members
	All Team Member Enrollment: 🗐 Learning Role Enrollment: * 🕄	 All Roles Global Roles LMS Example Roles MS Learning Roles New Learners Social Groups Translation Roles
	Role Criteria: 🗊 Role Status: * 🗊	Match All Match Any Pending Active Expired
	Additional Enrollment: 0	Individual Enrollment

- 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.

Teams: * (1) All Team Member Enrollment: (1)	All Members All Roles
Learning Role Enrollment: * 🕕	 Air Roles Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles
Role Criteria: 🕕 Role Status: * 🕕	 Match All Match Any Pending Active Expired
Additional Enrollment: 🕕	Individual Enrollment
Learners: 🕕	Show Search
Attempt Date Range: Export Format:	Last 30 Days Report Viewer (on page)

• Learners: Click Show Search to display the search options.

Teams: * 🕕	All Members
All Team Member Enrollment: 📵	2
Learning Role Enrollment: * 🕕	All Roles
	Global Roles
	M LMS Example Roles
	IMS Learning Roles
	New Learners
	Social Groups
	Translation Roles
Role Criteria: 🗐	Match All Match Any
Role Status: * 📵	Pending Active Expired
Additional Enrollment: 🕕	Individual Enrollment
Learners: 🗊	Show Search
Attempt Date Range: 🛈	Last 30 Days
Export Format: 🕕	Report Viewer (on page)

• Use this field to search for **specific Learners** within the selected Learning Roles.

Learners: 🕕	Hide Search	
Search String: 📵	Davidson	
Search String: 🙂	Barrason	
Search Field: 📵	User Name 🔻	
Sort Order: 📵	User Name 🔹	
	Search for Learners	
	Select / Unselect	Learner List (7)
	Bdavidson [Bryant Davidson]	
	Cdavidson [cheese Davidson]	
	Ddavidson [david Davidson]	
	Jdavidson [John Davidson]	
	Odavidson [Osvald Davidson]	
	Pdavidson [pato Davidson]	
	Sdavidson [Serge Davidson]	

• Attempt Date Range: Allows you to apply a Filter with a given Date Range.

Attempt Date Range: 🕕 Export Format: 🗊	Last 30 Days V All Time Today	.
Advanced Options	Yesterday This Week Last 7 Days	~
Display Columns	Last Week This Month Last 30 Days	~
Generate Report	Last Month Custom Calendar	

• Export Format: Select a Report output option. Use All Column Raw CSV (comma delimited) for large data-sets.

Attempt Date Range: 🕕	Last 30 Days	_
Export Format: 🕕	Report Viewer (on page) Report Viewer (on page)	•
Advanced Options	Acrobat (PDF) file Excel Worksheet CSV (comma delimited)	
Display Columns		

Generate Report

• Advanced Options: Click the down arrow to display the Advanced Options.

	Attempt Date Range: 📵	Last 30 Days		
	Export Format: 📵	Report Viewer (on page)	•	
Advanced Options				v
Display Columns				*
Generate Report				

- 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.

Advanced Options		
Folder Attempts: 🕕	Current and All Archive [,] T	
Completion Status: 🗐	🗹 Complete 🗹 In Progress 🗹 Not Attempted	
Success Status: 🗊	Passed Failed Any	
Due Date Range: 🗐	All Time •	
LE Attempts (for LE Details): 🗐	Last	
Include Enrollment from Parent Teams: 🕕	2	
isplay Columns		

Generate Report

• **Display Columns:** Click the down arrow to display this section.

Advanced Options		^
Folder Attempts: 🗊	Current and All Archive	
Completion Status: 🗐	🗹 Complete 闭 In Progress 闭 Not Attempted	
Success Status: 🕕	Passed Failed Any	
Due Date Range: 🕕	All Time 🔹	
LE Attempts (for LE Details): 🚳	Last	
Include Enrollment from Parent Teams: 🗊	8	
Display Columns		~
		_
Generate Report		

• Select the columns you want to be presented in the resulting report by checking the boxes next to them.

isplay Columns					
eport Details					
Learning Folder Path		Role Name	Not Attempted	Failed	
Course		Due Date	In Progress	Learner Details	
Folder Type	۲	Learners	Completed	Child Folders	
Team		Enrolled	Passed		

Gene	ente.	Dop	~ ++
Gene	ale	Rep	υrι

• 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							
ort Details							
Learning Folder Path		Role Name	1	Not Attempted		Failed	
Course		Due Date	1	In Progress	1	Learner Details	
Folder Type	1	Learners	1			Child Folders	
Team		Enrolled					
	ort Details Learning Folder Path Course Folder Type	ort Details Learning Folder Path Course Folder Type	Ort Details Learning Folder Path Role Name Course Due Date Folder Type Learners	Ort Details Learning Folder Path Role Name Course Due Date Folder Type Learners	Ort Details Role Name Not Attempted Learning Folder Path Due Date In Progress Folder Type Learners Completed	ort Details Learning Folder Path Role Name Not Attempted Course Due Date In Progress In Fogress Folder Type Learners Completed Completed	

^



You can obtain more specific data by clicking on **View** links provided within the report.

Learning Folder Summary with Folder D	etail				
Date Range: All Time Report Generated: 10/23/2017 10:45:28 AM					
Report Generated, 10/25/2017 10.45.20 All					
Refresh					14 III III III
Drag a column header and drop it here to gr	oup by that column.				
Course	Learners	Not Attempted	Completed	In Progress	Learner Details
T	T	T	T	T	
LMS Learner Training	43	8	1	43	View
New Employee Orientation	43		43		View
K K I ► ► Page Size: 100 ▼					2 items in 1 pages
					🛃 📓 🕎
Refresh					

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.

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.

LE Utilization with Learner Detail		Active Team: All Members	
Reports » LE Utilization with Learner Detail Definitions		~	
Filters)
Specify the Filter settings used in the Report.			
Learning Catalog: * 🕕	 All Selected Select / Unselect LMS Learner Training LMS Admin Training OpenSesame New Employee Orientation 		
Teams: * 🗐 All Team Member Enrollment: 🗊 Learning Role Enrollment: * 🕲	 All Members All Roles Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles 		

• Teams: Select all Teams by checking box next to All Members or select specific Teams.

LE Utilization with Learner Detail		Active Team:	All Members
Reports » LE Utilization with Learner Detail			
Definitions			
Filters			
Specify the Filter settings used in the Report.			
Learning Catalog: * 🕕	 All Selected Select / Unselect LMS Learner Training LMS Admin Training OpenSesame New Employee Orientation 		
Teams: * 🕕 All Team Member Enrollment: 🗊	All Members		
Learning Role Enrollment: * 🕕	 All Roles Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles 		

- 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.

Learning Catalog: * 📵	All Selected			
6 catalogi	Select / Unselect			
	🗷 🗀 LMS Learner Training			
	🔲 🗀 LMS Admin Training			
	🕨 🗖 OpenSesame			
	🕨 🗷 🗀 New Employee Orientation			
Teams: * 🕕	🕨 🗹 All Members			
All Team Member Enrollment: 🗊				
Learning Role Enrollment: * 🕲	 All Roles Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles 			
Role Criteria: 🗊	O 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)			

• **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

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(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.

AI	l Team Member Enrollment: 🛈		
	Learning Role Enrollment: * 🕕	All Roles	
	0	Global Roles	
		M LMS Example Roles	
		LMS Learning Roles	
		New Learners	
		Social Groups	
		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			

Display Columns

Generate Report

• Learners: Click Show Search to display the search options.

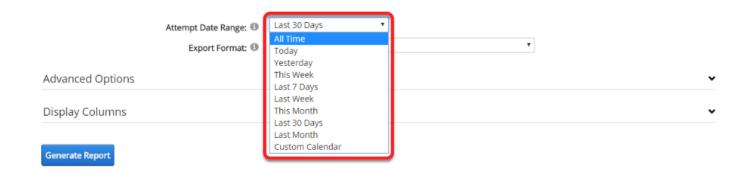
All Team Member Enrollment: 🗐		
Learning Role Enrollment: * 📵	 All Roles Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles 	
Role Criteria: 🕕	Match All Match Any	
Role Status: * 💷	Pending Active Expired	
Additional Enrollment: ① Learners: ① Attempt Date Range: ① Export Format: ③	Individual Enrollment Unenrolled (with Attempts) Show Search Last 30 Days Report Viewer (on page)	Ŧ
Advanced Options		~
Display Columns		~

Generate Report

• Use this field to search for **specific Learners** within the selected Learning Roles.

Learners: 🛈	Hide Search	
Search String: 🕕	Davidson	
Search Field: 🛈	User Name 🔻	
Sort Order: 🛈	User Name 🔻	
	Search for Learners	
	Select / Unselect	Learner List (7)
	Bdavidson [Bryant Davidson]	
	Cdavidson [cheese Davidson]Ddavidson [david Davidson]	
	Jdavidson [John Davidson]	
	Odavidson [Osvald Davidson]	
	 Pdavidson [pato Davidson] Sdavidson [Serge Davidson] 	

• 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.

Attempt Date Range: 🕕	Last 30 Days 🔻	
Export Format: 🕕	Report Viewer (on page)	
	Report Viewer (on page)	
Advanced Options	Acrobat (PDF) file	
Advanced Options	Excel Worksheet	•
	CSV (comma delimited)	
Display Columns		~

Generate Report

Generate Report

• Advanced Options: Click the down arrow to display the Advanced Options.

	Attempt Date Range: 🕕	Last 30 Days	T		
	Export Format: 📵	Report Viewer (on page)		٣	
Advanced Options					·
Display Columns					•

- 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).

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- **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.

Advanced Options	^
Completion Status: ④ Success Status: ④	 Complete In Progress Not Attempted Passed Failed Any
Due Date Range: 🕕	All Time 🔹
LE Attempts: 🕕	Last •
Include Archived Attempts 🕕	
Include Enrollment from Parent Teams: 🕕	2
Include ID values in CSV: 🕕	
Portals: 🕕	All Portals
	Accord LMS Documentation Portal
Display Columns	~



• Display Columns: Click the down arrow to display this section.

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 Enrollment from Parent Teams: 🕕	×	
Include ID values in CSV: 📵		
Portals: 🕕	All Portals	
	Accord LMS Documentation Portal	
Display Columns	(•
Generate Report		

- **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.

	eral Details	 LE Name		In Progress		Score
				-		
	First Name	Team		Not Attempted		Passing
	Last Name	Role Name	•	Success		Units
	Email	Due Date		Passed		Awarded
	Authorized	Attempt		Failed		Duration
	Portal Name	Completion		Points	•	Date
	Learning Folder Path	Complete		Possible		Time
	Course					
Pro	île Details					
	test	City		Cell		PreferredTimeZone
	Prefix	Region		Fax		Display
	MiddleName	Country		Website		TimeZone
	Suffix	PostalCode		IM		PreferredLocale
	Unit	Telephone		Biography		Photo

• Click **Generate Report** to view or download the report file according to the selected format chosen above. The report will display as shown below.

General Details						
🗹 User Name	۲	LE Name		In Progress		Score
First Name		Team		Not Attempted		Passing
Last Name		Role Name	۲	Success		Units
Email		Due Date		Passed		Awarded
Authorized		Attempt		Failed		Duration
Portal Name		Completion		Points	۲	Date
Learning Folder Path		Complete		Possible	۲	Time
Course						
Profile Details						
test		City		Cell		PreferredTimeZone
Prefix		Region		Fax		Display
MiddleName		Country		Website		TimeZone
Suffix		PostalCode		IM		PreferredLocale
Unit Unit		Telephone		Biography		Photo
Street						



Return

LE Utilization with Learner Detail

Date Range: Last 30 Days Report Generated: 10/23/2017 11:14:02 AM

User Name	Course	LE Name	Completion	Success	Score	Date	Time
T	T	T	T	T	T		
Agray	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 P
alsimmons	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 P
Arideout	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 P
Bdavidson	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 P
Cdavidson	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 P
Cjong	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 P
Ddavidson	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 P
izmadmin	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 P
Jdavidson	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 P
JDoe	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 P
jfitz	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 P
Jharris	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 P
Jhartley	LMS Learner Training	Community Features	Complete	Passed	100%	2017.10.18	2:15:00 P
Jdavidson	LMS Learner Training	LMS Learner Quiz	Complete	Passed	100%	2017.10.18	2:15:00 P
JDoe	LMS Learner Training	LMS Learner Quiz	Complete	Passed	100%	2017.10.18	2:15:00 P
jfitz	LMS Learner Training	LMS Learner Quiz	Complete	Passed	100%	2017.10.18	2:15:00 P
Jharris	LMS Learner Training	LMS Learner Quiz	Complete	Passed	100%	2017.10.18	2:15:00 P
Jhartley	LMS Learner Training	LMS Learner Quiz	Complete	Passed	100%	2017.10.18	2:15:00 P
Jmontero	LMS Learner Training	LMS Learner Quiz	Complete	Passed	100%	2017.10.18	2:15:00 P
4 1 2 3 4 5 6 7	8 9 F F Page Size: 100	•				816 iten	ns in 9 page

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.

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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.

LE Utilization: Most Utilized		Active Team: All Members 🔹
Reports » LE Utilization: Most Utilized Definitions		~
Filters		<u>^</u>
Specify the Filter settings used in the Report.		
Learning Catalog: * 🕲	 All Selected Select / Unselect LMS Learner Training LMS Admin Training OpenSesame New Employee Orientation 	
Teams: * 🗐 All Team Member Enrollment: 🕄 Learning Role Enrollment: * 🗐	 All Members All Roles Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles 	

• **Teams:** Select all Teams by checking box next to **All Members** or select specific Teams.

LE Utilization: Most Utilized		Active Team:	All Members	-
Reports » LE Utilization: Most Utilized				
Definitions				~
Filters				^
Specify the Filter settings used in the Report.				
Learning Catalog: * (1) Teams: * (1) All Team Member Enrollment: (1)	 All Selected Select / Unselect LMS Learner Training LMS Admin Training OpenSesame New Employee Orientation All Members 			
Learning Role Enrollment: * 🗊	 All Roles Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles 			

- 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.

LE Utilization	: Most Utilized		Active Tean	All Members
Reports » LE Utiliza Definitions	ation: Most Utilized			~
Filters				^
Specify the Filter	settings used in the Report.			
	Learning Catalog: * 🕕	 All Selected Select / Unselect LMS Learner Training LMS Admin Training OpenSesame New Employee Ories 	g	
	Teams: * 🕕	🕨 🗹 All Members		
	All Team Member Enrollment: 🛈 Learning Role Enrollment: * 🗊	 All Roles Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles 		

• **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

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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.

/	All Team Member Enrollment: 🕕	×	
	Learning Role Enrollment: * 🕕	 All Roles Global Roles LMS Example Roles LMS Learning Roles New Learners Social Groups Translation Roles 	
	Role Criteria: ① Role Status: * ① Additional Enrollment: ①	 Match All Match Any Pending Active Expired Individual Enrollment Unenrolled (with Attempts) 	
	Learners: ④ Attempt Date Range: ① Export Format: ①	Show Search Last 30 Days • Report Viewer (on page)	
otions			

Advanced Options

Display Columns

Generate Report

• Learners: Click Show Search to display the search options.

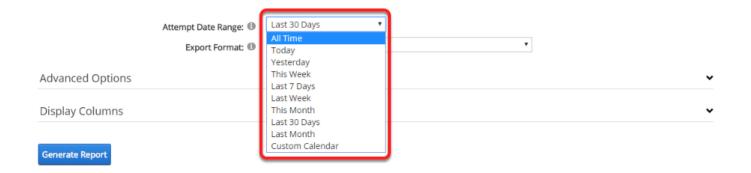
All Team Member Enrollment: 🕕	8	
Learning Role Enrollment: * 🕕	All Roles	
	Global Roles	
	IMS Example Roles	
	IMS Learning Roles	
	New Learners	
	Social Groups	
	Translation Roles	
Role Criteria: 🕕	Match All Match Any	
Role Status: * 🕕	Pending Z Active Expired	
Additional Enrollment:	🗷 Individual Enrollment 🗹 Unenrolled (with Attempts)	
Learners: 🛈	Show Search	
	Last 30 Days	
Attempt Date Range: 🕕		
Export Format: 🕕	Report Viewer (on page)	
Advanced Options		
Advanced Options		•
Display Columns		•

Generate Report

• Use this field to search for **specific Learners** within the selected Learning Roles.

Learners: 🕕	Hide Search	
Search String: 🕕	Davidson	
Search Field: 📵	User Name 🔹	
Sort Order: 🕕	User Name 🔻	
	Search for Learners	
	Select / Unselect	Learner List (7)
	Bdavidson [Bryant Davidson]	
	Cdavidson [cheese Davidson]	
	Ddavidson [david Davidson]	
	Jdavidson [John Davidson]	
	Odavidson [Osvald Davidson]	
	Pdavidson [pato Davidson]	
	Sdavidson [Serge Davidson]	

• 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.

Attempt Date Range: 🕕	Last 30 Days	`
Export Format: 📵	Report Viewer (on page)	
Advanced Options	Report Viewer (on page) Acrobat (PDF) file Excel Worksheet CSV (comma delimited)	
Display Columns		•

• **Advanced Options:** Click the down arrow to display the Advanced Options.

	Attempt Date Range: 🕕	Last 30 Days	,	
	Export Format: 🕕	Report Viewer (on page)		•
Advanced Options				~
Display Columns				~
Generate Report				

- **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).

Paccord LMS

• Include Enrollment from Parent Teams: Include Enrollment from the Parent Teams of the selected Child Teams.

Advanced Options		^
Success Status: 🕕 Due Date Range: 🕕	All Time 🔻	
LE Attempts: 🕕	Last •	
Include Archived Attempts 🕕		
Include Enrollment from Parent Teams: 🕕	2	
Display Columns		~

Generate Report

Generate Report

• **Display Columns:** Click the down arrow to show this section.

Advanced Options		^
Success Status: ④ Due Date Range: ④ LE Attempts: ④ Include Archived Attempts ④	All Time Last	
Include Enrollment from Parent Teams: Display Columns	∞	~

• **General Details:** Select the columns you want to be presented in the resulting report by checking the boxes next to them.

eneral Details					
Learning Folder Path		Due Date	Passed	Passing	
Course	۲	Attempt	Failed	Units	
LE Name		Complete	Points	Awarded	
Team		In Progress	Possible	Duration	
Role Name		Not Attempted	Score		

		_		
Gen	erat	ie R	en	ort
	u		-	~

PACCORD LMS

• Click **Generate Report** to view or download the report file according to the selected format chosen above. The report will display as shown below.

Dis	Display Columns .								
Ge	neral Details								
	Learning Folder Path		Due Date		Passed		Passing		
	Course	•	Attempt		Falled		Units		
ø	LE Name	1	Complete		Points		Awarded		
	Team	1	In Progress		Possible		Duration		
	Role Name	•	Not Attempted		Score				



LE Utilization: Most Utilized

Date Range: Last 30 Days Report Generated: 1/11/2016 12:42:04 PM

Refresh				, 19 19 -
Drag a column header and drop it here to group by	that column.			
LE Name	Attempt	Complete	In Progress	Not Attempted
T	T	T	T	T
Learner Experience	22	22		
Community Features	22	22		
Assignment Upload	22	22		
LMS Learner Quiz	22	22		
Certificate of Completion	22	22		
Accord Learner Training Workshop	0			22
I				6 items in 1 pages
Refresh		Return		6 🖉 🗒

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.

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 Element Quiz or Survey: Select the Learning Element Quiz or Survey you want to run the report on from the drop-down menu.

Question Utilization: Learner Detail		Active Team: All Members	•
Reports » Question Utilization: Learner Detail			
Definitions			~
Filters			Ć
Specify the Filter settings used in the Report.			
Learning Element Quiz or Survey: * (1) Teams: * (1) All Team Member Enrollment: (1) Learning Role Enrollment: * (1)	Select a Learning Element > Select a Learning Element > LMS Larner Training LMS Admin Training Accord Storefront Training Operations manufactor reduce		
Role Criteria: 🕕	○ Match All Match Any Pending Active Expired		
Role Status: * 🕚 Additional Enrollment: 🕚	□ Individual Enrollment□ Unenrolled (with Attempts)		
Learners: 🕕	Show Search		

• Teams: Select all Teams by checking box next to All Members or select specific Teams.

Question Utilization: Learner Detail	Active Team:	All Members
Reports » Question Utilization: Learner Detail		

Definitions	~
Filters	^
Specify the Filter settings used in the Report.	
Learning Element Quiz or Survey: * () Teams: * () All Team Member Enrollment: () Learning Role Enrollment: * ()	LMS Learner Quiz All Members All Roles:
	Global Roles Global Roles Global Roles Translation Roles
Role Criteria: 🕕	O Match All Match Any
Role Status: * 📵	Pending Active Expired Expired
Additional Enrollment: 1	Individual Enrollment Unenrolled (with Attempts)
Learners: 0	Show Search

٠

- 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.

Question Ut	ilization: Learner Detail	Active Team: All Members	•
Reports » Questio	on Utilization: Learner Detail		
Definitions			•
Filters			^
Specify the Filter	settings used in the Report.		
Lea	arning Element Quiz or Survey: * 🗊	LMS Learner Quiz 🔹	
	Teams: * 📵	All Members	
	All Team Member Enrollment: ()		
	Learning Role Enrollment: * 🛈	All Roles:	
	_	Global Roles	
		A 🔳 LMS Example Roles	
		C AccDownloads	
		Community Learners	
		Community Learners IMS Admin Training	
		✓ LMS Learner Training	
	l	Translation Roles	
	Role Criteria: 🛈	O Match All Match Any	
	Role Status: * 🕕	Pending Active Expired Expired	

• **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.

	Role Criteria: 0	○ Match All
	Additional Enrollment: 0	□ Individual Enrollment□ Unenrolled (with Attempts)
	Learners: 0	Show Search
	Attempt Date Range: 🕕	Last 30 Days 🗸
	Export Format: 🕕	Report Viewer (on page)
Advanced Options		
Display Columns		



Generate Report

• Learners: Click Show Search to display the search options.

	Role Criteria: 🕕	O Match All
	Role Status: * 🕕	Pending Active Expired
	Additional Enrollment:	Individual Enrollment Unenrolled (with Attempts)
	Learners: 🛈	Show Search
	Attempt Date Range: 🕕	Last 30 Days 🗸
	Export Format: ①	Report Viewer (on page)
Advanced Options		•
Display Columns		· · · · · · · · · · · · · · · · · · ·
Generate Report		
Return		

• Use this field to search for **specific Learners** within the selected Learning Roles.

Learners: 🕕	Hide Search	
Search String: 🕕	a	
Search Field: 🛈	User Name	~
Sort Order: 📵	User Name	~
	Search for Learners	
	Select / Unselect	Learner List (17)
	Agray [Ashleigh Gray]	^
	🗌 Arideout [Alexandra Rideou	it]
	Bdavidson [Bryant Davidsor	n]
	Cdavidson [cheese Davidson	n]
	Ddavidson [david Davidson]	1
	🗌 izmadmin [IZM Admin]	
	Jdavidson [John Davidson]	
	Ibarris (Joseph Harris)	v
Attempt Date Range: 🕕	Last 30 Days ~	

• Attempt Date Range: Allows you to apply a Filter with a given Date Range.

	Sdavidson [Serge Davidson]		
	Tmurray (Tania Murray)		~
Attempt Date Range: 🕕	Last 30 Days 🗸		
Export Format: 🕕	All Time Today Yesterday	~	
Advanced Options	This Week Last 7 Days Last Week		•
Display Columns	This Month Last 30 Days		•
Generate Report	Last Month Custom Calendar	-	
Return			

• Export Format: Select a Report output option. Use All Column Raw CSV (comma delimited) for large data-sets.

	Tmurray [Tania Murray]	•
Attempt Date Range: 🕕	Last 30 Days	
Export Format: 🕕	Report Viewer (on page)	
Advanced Options	Report Viewer (on page) Acrobat (PDF) file Excel Worksheet All Column Raw CSV (comma delimited)	~
Display Columns		~
Generate Report		



• Advanced Options: Click the down arrow to show the Advanced Options.

		Tmurray [Tania Murray]	*
	Attempt Date Range: 🕕	Last 30 Days 🗸	
	Export Format: 🕕	Report Viewer (on page)	
Advanced Options			
Display Columns			*
Generate Report			
Return			

- **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.

Accord LMS

Advanced Options		
LE Attempts: ()	Last	
Completion Status: 🕕	Complete In Progress	
Success Status: 🕕	○ Passed ○ Failed ● Any	
Due Date Range: 🕕	All Time 🗸	
Include Archived (LE Attempts) 🕕		
Include Enrollment from Parent Teams: 🗐		
Display Columns		
Generate Report		
Return		

• **Display Columns:** Click the down arrow to expand this section.

Advanced Options		^
LE Attempts: ④	Last ~	
Completion Status: (1)	☑ Complete☑ In Progress	
Success Status: 🛈	O Passed O Failed Any	
Due Date Range: 🕕	All Time ~	
Include Archived (LE Attempts) 🗐		
Include Enrollment from Parent Teams: 🕲		
Display Columns		_ C
Generate Report		
Return		

- **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.

Return

ieneral Details						
User Name		Role Name		Response		Unknown
□ First Name		Due Date		Attempt		Value
Last Name		Question		Correct		Duration
🗆 Email		Туре		Incorrect		Date
Portal Name	\checkmark	Answer		Survey		Time
Team						
Team						
Team						
rofile Details		City		Cell		PreferredTimeZone
rofile Details		City Region		Cell Fax	_	PreferredTimeZone TimeZone
rofile Details Prefix MiddleName						
		Region		Fax		TimeZone

^

• Click **Generate Report** to view or download the report file according to the selected format chosen above. The report will display as show below.

Dis	splay Columns					^
Ge	neral Details					
	User Name		Role Name	Response		Unknown
	First Name		Due Date	Attempt		Value
	Last Name			Correct		Duration
	Email		Туре	Incorrect	\checkmark	Date
	Portal Name	Z	Answer	Survey	\checkmark	Time
	Team					
Pro	ofile Details					
	Prefix		City	Cell		PreferredTimeZone
	MiddleName		Region	Fax		TimeZone
	Suffix		Country	Website		PreferredLocale
	Unit		PostalCode	IM		Photo
	Street		Telephone	Biography		
Ge	nerate Report					

Return

Question Utilization: Learner Detail

Date Range: Last 30 Days Report Generated: 1/11/2016 1:14:21 PM

Refresh **d** 🛛 🗳
 Correct UAS
 3 d All of the above
 3 d All of the above
 3 d All of the above
 1
 1
 2016.01.11
 12:59:23 PM
 2 - The Pie Chart to the leif of Learning choice Elements can Indicate: 2 - The Pie Chart to the leif of Learning choice Elements can Indicate: 3 - Clicking on a 3 d All of the 3 d All of the 1 1 above above 1 1 izmadmin 2016.01.11 1:07:44 PM 3 d All of the 3 d All of the 1 1 2016.01.11 12:59:23 PM eguser Elements can indicate: 3 - Clicking on a Folder or Learning Element nore disals more disals more disals content. 3 - Clicking on a Folder or Learning Element nore desals about the Content. 4 - A Learner can share ideas, pictures and hearbears and Learning Groups. madmin 1 True 1 True 1 1 2016.01.11 1:07:44 PM 2016.01.11 12:59:23 PM 1 True 1 True 1 1 reguser 1 1 nadr 1 True 1 True 2016.01.11 1:07:44 PM 1 True 1 1 2016.01.11 12:59:23 PM 1 True reguser H I F F Page Size: 50 -8 items in 1 pages Return Refresh **.**

Report Definitions

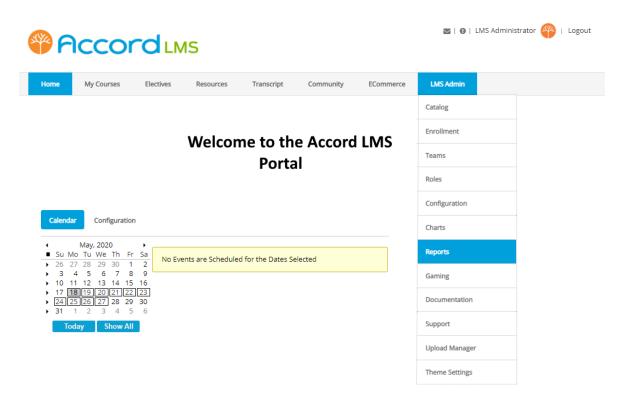
Creating Report Definitions allows you to store varied report filter settings for reports which are generated regularly. You can have certain types of Reports generated and delivered automatically at intervals of your choosing.

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.

Paccord LMS

- Ensure **Define New Report** is showing in the dropdown menu.
- Click **Continue**.

Repor	rts Activity Configuration			Active Team: All Members
Quick	k Reports			
Ň	Easy Configuration			
	LE Activity	< Define New Report >	▼ Continue	
	with Learner Detail			
Learr	ner Activity			
• 2				
	Reports grouped by Roles an	d Learners		
	Learner Activity/Transcript	< Define New Report >	Continue	
	with Folder Detail			
	Learner Activity/Transcript	< Define New Report >	▼ Continue	
	with LE Detail			
	Learner Activity/Score	< Define New Report >	▼ Continue	
	with Question Detail			
	Learner Activity	< Define New Report >	▼ Continue	
	Most Active			
	Learner Activity	< Define New Report >	▼ Continue	
	Summary			
	Learner Accounts	< Define New Report >	▼ Continue	
	with Profile Detail	Come new Reports	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.

Reports » Learner Activity/Transcript with Folder De	tail				
	Reports » Learner Activity/Transcript with Folder Detail				
Definitions					
ilters					
Specify the Filter settings used in the Report.					
Learning Catalog: * 🖲					
Teams: * @	All Members				
All Team Member Enroliment: 🖲					
Learning Role Enrollment: * 🛛					
Role Criteria: 🗉) O Match All 🖲 Match Any				
Role Status: * 🖲	Pending 🗹 Active 🗆 Expired				
Additional Enrollment: @	Individual Enrollment 🗌 Unenrolled (with Attempts)				
Learners: 6	Show Search				
Attempt Date Range: @	All Time v				
Export Format: @	Report Viewer (on page)				
dvanced Options					
dvanced Options					
Display Columns					
Generate Report					

If necessary, click on the **Definitions** heading to open this panel.

Learner Activity/Transcript with Folder Detail

Active Team: All Members 🔹

Reports » Learner Activity/Transcript with Folder Deta	al de la constante de la const	
Definitions		~
Filters		^
Specify the Filter settings used in the Report.		
Learning Catalog: * 🚯	 All ● Selected Select / Unselect □ LMS Learner Training □ LMS Admin Training □ Accord Storefront Training ▶ □ □ Operations 	
Teams: * 📵 All Team Member Enrollment: 🚳	All Members	
Learning Role Enrollment: * ()	All Roles: Global Roles LMS Example Roles	
	Acc_Downloads	

- **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.

Learner Activity/Transcript with Folde	Active Team: All Members	
Reports » Learner Activity/Transcript with Folder Deta Definitions		~
Select Definition or create a new one from your Filter s	ettings. Share your Definition with other Teams. Schedule automatic Deliv	rery.
Selected Definition: (1) Definition Name: (1)	< Create New Definition >	
Definition Owner: Definition Description:	All Members	
Team View Permissions: 🕕		
No deliveries are scheduled.		
Generate Report Create	Updated: SuperUser Account on 16 June 2016 at 9:21 AM	

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.

Reports



Learner Activity

Reports grouped by Roles and Learners

Learner Activity/Transcript with Folder Detail	< Select Report Definition >	Continue
Learner Activity/Transcript with LE Detail	< Select Report Definition > < Define New Report > All Members Monthly Sample Chart 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

• If necessary, expand the **Definitions** panel by clicking on the heading.

Learner Activity/Transcript with Folder Detail	Active Team: All Members
Reports » Learner Activity/Transcript with Folder Detail	_
Definitions	L L L L L L L L L L L L L L L L L L L
Filters	~
Advanced Options	~
Display Columns	~

Generate Report

- Perform any desired modifications.
- Click **Update** to save changes.

Definitions	^
Select Definition or create a new one from your Filter s	ettings. Share your Definition with other Teams. Schedule automatic Delivery.
Selected Definition: Definition Name:	All Members Monthly All Members Monthly
Definition Owner: Definition Description:	All Members All Members, All Learning Elements Monthly Report Definition
Team View Permissions: Delivery Schedule	
No deliveries are scheduled.	
Add New Delivery Version History: ()	Created: SuperUser Account on 16 June 2016 at 9:37 AM Generate Report Update Copy Delete

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.

Reports



Reports grouped by Roles and Learners

Learner Activity/Transcript with Folder Detail	< Select Report Definition > 🗸 🗸	Continue
With Folder Detail	< Select Report Definition >	
Learner Activity/Transcript	< Define New Report >	Constitution of
with LE Detail	All Members Monthly	Continue
	Sample Chart Report	
Learner Activity/Score with Question Detail	< Define New Report > V	Continue
Learner Activity Most Active	< Define New Report > ~	Continue
Learner Activity Summary	< Define New Report > V	Continue

• If necessary, expand the **Definitions** panel by clicking on the heading.

Learner Activity/Transcript with Folder Detail	Active Team: All Members
Reports » Learner Activity/Transcript with Folder Detail	_
Definitions	· · ·
Filters	~
Advanced Options	~
Display Columns	~

Generate Report

- 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.

Learner Activity/Transcript with Folder	r Detail	Active Team: All Members	•
Reports » Learner Activity/Transcript with Folder Deta Definitions			^
Definitions			^
Select Definition or create a new one from your Filter s	ettings. Share your Definition with other Teams. Schedule automatic Deli	very.	
Selected Definition:	All Members Monthly		
Definition Name:	New Employees All Members Monthly		
Definition Owner: 🕕	All Members		
Definition Description:	All Members, All Learning Elements Monthly Report Definition		
Team View Permissions: Delivery Schedule	 ▲ All Members ▶ ☑ New Employees 		
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			

Deleting a Definition

To Delete a Report Definition;

- Select the definition you want to delete from the dropdown list.
- Click **Continue.**

Reports



Learner Activity

Reports grouped by Roles and Learners

Learner Activity/Transcript with Folder Detail	< Select Report Definition > 🛛 🗸	Continue
with older betain	< Select Report Definition >	
Learner Activity/Transcript	< Define New Report >	
with LE Detail	All Members Monthly	Continue
	Sample Chart Report	
Learner Activity/Score with Question Detail	< Define New Report > 🛛 🗸	Continue
Learner Activity Most Active	< Define New Report >	Continue
Learner Activity	< Define New Report >	Continue
Summary		

• If necessary, expand the **Definitions** panel by clicking on the heading.

Learner Activity/Transcript with Folder Detail	Active Team: All Members -
Reports » Learner Activity/Transcript with Folder Detail	
Definitions	✓
Filters	~
Advanced Options	~
Display Columns	~

Generate Report

• Click **Delete**.

Definitions	^
Select Definition or create a new one from your Filter	ettings. Share your Definition with other Teams. Schedule automatic Delivery.
Selected Definition: () Definition Name: ()	All Members Monthly All Members Monthly
Definition Owner: Definition Description:	All Members All Members, All Learning Elements Monthly Report Definition
Team View Permissions:	
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.

Reports



Learner Activity Reports grouped by Roles and Learners

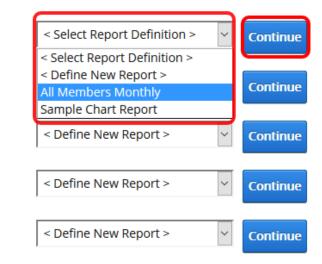
> Learner Activity/Transcript with Folder Detail

> Learner Activity/Transcript with LE Detail

Learner Activity/Score with Question Detail

Learner Activity Most Active

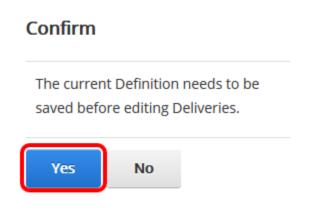
Learner Activity Summary



Click Add New Delivery.

Learner Activity/Transcript with Folde	r Detail	Active Team:	All Members	-
Reports » Learner Activity/Transcript with Folder Deta Definitions	a			
Select Definition or create a new one from your Filter s	ettings. Share your Definition with other Teams. Schedule automatic	Delivery.		
Selected Definition: () Name: ()	New Employees All Members Monthly	r		
Owner: () Description: ()	All Members All Members, All Learning Elements Monthly Report Definition			
Team View Permissions: () Delivery Schedule	 ✓ All Members ▶ □ Human Resources 	11		
No deliveries are scheduled.				
Add New Delivery Version History: (1)	Created: IZMAdmin on 27 March 2017 at 10:08 AM			
	Generate Report Update Copy Delete			

• Confirm that the Definition has been saved prior to editing deliveries.



• The **Delivery Schedule - Details** window will open.

DELIVERY SCHEDULE - DETAILS	□ ×
Delivery Details	^
Delivery Name: * 🕕	
Active: 🕦	
Date Range: 🚯	All Time
Export Format: 🕦	CSV (comma delimited) ~
Frequency: * 🕦	1 Days ~
Start Date: 🕦	Tuesday, 28 March : 📺
Time of Day: 🕦	00:00 🗸
Next Delivery Due: 🕦	Wednesday, 29 March 2017 at 00:00
Deliver to Team LMS Admins: ()	All Members
Deliver to Email Addresses: ()	
Quicktest Email Address: ()	pablo.guigou@accordl Send
Update Cancel	

- **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.

Delivery Name: * 🚯	Monthly Activity Report
Active: 🚯	
Date Range: 🕦	All Time 🗸
Export Format: 🕦	CSV (comma delimited) v
Frequency: * 🚯	1 Days ~
Start Date: 🚯	Tuesday, 28 March : 📺
Time of Day: 🕦	00:00 🗸
Next Delivery Due: 🕦	Wednesday, 29 March 2017 at 00:00
Deliver to Team LMS Admins: 📵	► ✓ All Members
Deliver to Email Addresses: ()	sample@sample.com
Quicktest Email Address: 🚯	pablo.guigou@accordl Send

• **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.

.d

- **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**.

DELIVERY SCHEDULE - DETAILS		• ×
Delivery Details		^
Delivery Name: * 🚯	Monthly Activity Report	
Active: () Date Range: () Export Format: () Frequency: * ()	All Time CSV (comma delimited) Days	
Start Date: 🕦 Time of Day: 🌒 Next Delivery Due: 📦	Tuesday, 28 March : IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	
Deliver to Team LMS Admins: () Deliver to Email Addresses: () Quicktest Email Address: ()	All Members sample@sample.com pablo.guigou@accordl Send	
Update Cancel		

....

• Click **Update** to save the Delivery Schedule and return to the Definitions screen.

DELIVERY SCHEDULE - DETAILS		×
Delivery Details		^
Delivery Name: * 🕦	Monthly Activity Report	
Active: ()	All Time	
Date Range: 1 Export Format: 1	All Time CSV (comma delimited)	
Frequency: * 🕦	1 Days 🗸	
Start Date: 🚯	Tuesday, 28 March : 📺	
Time of Day: 1	00:00 v Wednesday, 29 March 2017 at 00:00	
Deliver to Team LMS Admins: ()	▶ ☑ All Members	
Deliver to Email Addresses: Quicktest Email Address:	sample@sample.com pablo.guigou@accordl Send	
Update Cancel		

The Delivery will be listed under Delivery Schedule showing some details like Name, Active (check-box checked), Frequency, Next Delivery and Teams.

Definitions						^	
Select Definition or create a new one from your Filter se	Select Definition or create a new one from your Filter settings. Share your Definition with other Teams. Schedule automatic Delivery.						
Selected Definition: () Name: ()		New Employees All Members Monthly New Employees All Members Monthly					
Owner: 10 Description: 10	All Members All Members, All Learning Elements Monthly Report Definition						
Team View Permissions:	 All Members Human Resources 	s					
Name		Active	Freq.	Next Delivery	Teams:		
Add New Delivery		M	1 Days	29 March 2017	All Members	~	

Editing a Delivery Schedule

To edit a delivery schedule:

• Click the **pencil** icon next to it.

Definitions						
Select Definition or create a new one from your Filter s	ettings. Share your Definition	n with other 1	eams. Sched	ule automatic Deliver	у.	
Selected Definition: 🕕 Name: 🕕		New Employees All Members Monthly				
Owner: Owner:	All Members All Members, All Learning Elements Monthly Report Definition					
Team View Permissions:	.a ▲					
Name		Active	Freq.	Next Delivery	Teams:	
📝 🖹 Monthly Activity Report		M	1 Days	29 March 2017	All Members	~
Add New Delivery						

PCCORDING

• The **Delivery Schedule Details** window will open.

		×
Delivery Details		^
Delivery Name: * 🗊	Monthly Activity Report	
Active: 1 Date Range: 1 Export Format: 1	All Time CSV (comma delimited)	
Frequency: * 🚯	1 Days ~	
Start Date: () Time of Day: ()	Tuesday, 28 March : 00:00	
Next Delivery Due: 🕦	Wednesday, 29 March 2017 at 00:00	
Deliver to Team LMS () Admins:	▶ ☑ All Members	
Deliver to Email Addresses: 🕕	sample@sample.com	
Quicktest Email Address: 🕦	pablo.guigou@accordl Send	
Update Copy Delete	Cancel	

.::

..:

- Modify the desired items.
- Click **Úpdate** to save the changes and return to Definitions screen.

DELIVERY SCHEDULE - DETAILS		×
Delivery Details		^
Delivery Name: * 🕕	Monthly Activity Report	
Active: 🚯		
Date Range: 🕦	All Time 🗸	
Export Format: 🕦	CSV (comma delimited) ~	
Frequency: * 🕦	1 Days v	
Start Date: 🕦	Friday, 31 March 20 📺	
Time of Day: 🌒	03:30 🗸	
Next Delivery Due: 🕦	Saturday, 01 April 2017 at 03:30	
Deliver to Team LMS (1) Admins:	All Members	
Deliver to Email Addresses: 🕦	sample@sample.com	
Quicktest Email Address: ()	pablo.guigou@accordl Send	
Update Copy Delete	Cancel	

Add New Delivery

Copy a Delivery Schedule

• Click the **pencil** icon next to it.

Definitions						
Select Definition or create a new one from your Filter s	attings Chara your Definition	with other 1	aams Schad	ile automatic Deliver		
Select Deminition of create a new one norm your Pilter s	ettings, share your Demittion	with other 1	earris, scrieut	de automatic Deliver	y.	
Selected Definition: Image:						
Name: (1) New Employees All Members Monthly						
Owner: All Members						
Description: ()	All Members, All Learning E	lements Mo	nthly Report D	Definition		
				.si		
Tearn View Permissions: (1)	 All Members Human Resources 	5				
Delivery Schedule						
Name		Active	Freq.	Next Delivery	Teams:	
📝 🗎 Monthly Activity Report			1 Days	01 April 2017	All Members	~

• The **Delivery Schedule Details** window will open.

DELIVERY SCHEDULE - DETAILS		×
Delivery Details		^
Delivery Name: * 🕕	Monthly Activity Report	
Active: 🚯		
Date Range: 🕦	All Time 🗸	
Export Format: 🕦	CSV (comma delimited) ~	
Frequency: * 📵	1 Days 🗸	
Start Date: 🕦	Friday, 31 March 20 📺	
Time of Day: 🕦	03:30 🗸	
Next Delivery Due: 📵	Saturday, 01 April 2017 at 03:30	
Deliver to Team LMS Admins: 📵	All Members	
Deliver to Email Addresses: 🚯	sample@sample.com	
Quicktest Email Address: 🚯	pablo.guigou@accordl Send	
Update Copy Delete	Cancel	

....

• Give the copied Definition an **unique name**.

DELIVERY SCHEDULE - DETAILS		o ×
Delivery Details		^
Delivery Name: * 🚯	New Monthly Activity Report	
Active: () Date Range: () Export Format: () Frequency: * ()	All Time ~ CSV (comma delimited) ~ 1 Days	
Start Date: 🕦 Time of Day: 🚯	Friday, 31 March 20 03:30	
Next Delivery Due: () Deliver to Team LMS Admins: () Deliver to Email Addresses: ()	Saturday, 01 April 2017 at 03:30 Image: All Members sample@sample.com	
Quicktest Email Address: () Update Copy Delete	pablo.guigou@accordl Send	

..:

• Click Copy.

DELIVERY SCHEDULE - DETAILS	□ ×	
Delivery Details	^	
Delivery Name: * 🚯	New Monthly Activity Report	
Active: () Date Range: () Export Format: () Frequency: * ()	All Time ~ CSV (comma delimited) ~ 1 Days	
Start Date: () Time of Day: ()	Friday, 31 March 20 03:30	
Next Delivery Due: Deliver to Team LMS Admins: Deliver to Email Addresses: Quicktest Email Address:	Saturday, 01 April 2017 at 03:30 Call Members sample@sample.com pablo.guigou@accordl Send	
Update Copy Delete	Cancel	

• A Copy of the Definition will be created with all the same settings as the original.

Defin	itior	15						^
Sele	Select Definition or create a new one from your Filter settings. Share your Definition with other Teams. Schedule automatic Delivery.							
		Selected Definition: () Name: ()	New Employees All Membe New Employees All Membe	-		Y		
	Owner: I All Members Description: I All Members, All Learning Elements Monthly Report Definition							
Deliv	e ry S	Team View Permissions: ()	All Members	s		ii.		
		Name		Active	Freq.	Next Delivery	Teams:	
	ŀ	Monthly Activity Report			1 Days	01 April 2017	All Members	~
	41	New Monthly Activity Report			1 Days	01 April 2017	All Members	~
Add	Add New Delivery Version History: Created: IZMAdmin on 27 March 2017 at 10:08 AM							
			Generate Report Upda	te Cop	y Delete			

Deleting a Delivery Schedule

To delete a delivery:

• Click the **pencil** icon next to it.

Definitions						^
Select Definition or create a new one from your Filter settings. Share your Definition with other Teams. Schedule automatic Delivery.						
Selected Definition: ① Name: ①	New Employees All Membe			Y		
Owner: Description:	All Members All Members. All Learning Elements Monthly Report Definition					
Team View Permissions:	 Al Members Human Resources 	S		<u>it.</u>		
Name		Active	Freq.	Next Delivery	Teams:	
Monthly Activity Report			1 Days	01 April 2017	All Members	~
🕐 🖹 New Monthly Activity Report			1 Days	01 April 2017	All Members	~
Add New Delivery Version History: Created: IZMAdmin on 27 March 2017 at 10:08 AM Generate Report Update Copy Delete						

• The **Delivery Schedule - Details** window will open.

DELIVERY SCHEDULE - DETAILS	- ×
Delivery Details	~
Delivery Name: * 🚯	Monthly Activity Report
Active: 🕦	
Date Range: 🕕	All Time 🗸
Export Format: 🕕	CSV (comma delimited)
Frequency: * 🚯	1 Days 🗸
Start Date: 🕦	Friday, 31 March 20 📺
Time of Day: 🕦	03:30 🗸
Next Delivery Due: 🕕	Saturday, 01 April 2017 at 03:30
Deliver to Team LMS () Admins:	▶ ☑ All Members
Deliver to Email Addresses: 🕕	sample@sample.com
Quicktest Email Address: 🚯	pablo.guigou@accordl Send
Update Copy Delete	Cancel

• Click **Delete**.

DELIVERY SCHEDULE - DETAILS	•	×
Delivery Details		^
Delivery Name: * 🕕	Monthly Activity Report	
Active: 🕦		
Date Range: 🕦	All Time 🗸	
Export Format: 🕦	CSV (comma delimited)	
Frequency: * 👔	1 Days v	
Start Date: 🕦	Friday, 31 March 20 🟢	
Time of Day: 🚯	03:30 ~	
Next Delivery Due: 🕦	Saturday, 01 April 2017 at 03:30	
Deliver to Team LMS () Admins:	All Members	
Deliver to Email Addresses: 🕦	sample@sample.com	
Quicktest Email Address: 🚯	pablo.guigou@accordl Send	
Update Copy Delete	Cancel	

- 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.

Pccord LMS	🕿 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
	Catalog
Welcome to the Accord LMS	Enrollment
Portal	Teams
	Roles
	Configuration
Calendar Configuration	Charts
May, 2020 Su Mo Tu We Th Fr Sa 26 27 28 29 30 1 2 No Events are Scheduled for the Dates Selected	Reports
 26 27 28 29 30 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 	Gaming
 ▶ 17 18 19 20 21 22 23 ▶ 24 25 26 27 28 29 30 ▶ 31 1 2 3 4 5 6 	Documentation
Today Show All	Support
	Upload Manager
	Theme Settings

• Once in Reports, click on the **Activity** tab.

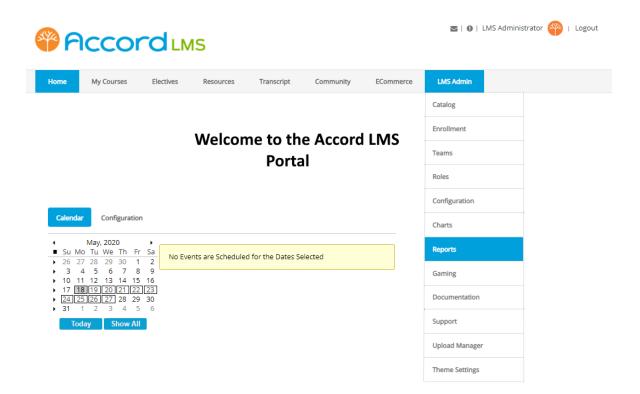
					🔤 0 LMS Administrator थ			ogout		
	CCO	rd LN								
			15							
Home	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin			
Reports	Activity	Configuration	on							
Activity	/						Active Team: All M	embers 🔹		
				Activity fo	or All Time					
You have 4	3 Learning Element	ts.								
	5	6	Which	Learning Elements	were viewed the mos	t?				
		7	1. LMS	Learner Quiz (121	views)					
	4			munity Features (1						
				ficate of Completic						
		9		gnment Upload (78						
		10		ion des priorités (4						
	·			ner Experience (43						
					Washing (42 views)					
				Safety (41 views) ficate of Completic	- (24					
	2			Safety - Introducti						
			TO, FIRE	salety - introducti	1011 (4 VIEWS)					
You have 4	1 Learners.									
Who we	re the most active	users?	Which	were the most activ	ve roles?					
1. izmad	min (100 views)		1. Regi	stered Users (711 v	views)					
2. regus	er (35 views)		2. LMS	Learner Training (8	647 views)					
3. pablo	.guigou@accordIm	s.com (16 views)	3. Com	munity Learners <i>(6</i>	611 views)					
4. portal	admin (16 views)		4. LMS	Admin Training (6	11 views)					
5. Imsad	min (16 views)		5. Adm	inistrators (151 vie	ews)					
6. Mstar	kweather (15 views	s)	6. Unve	erified Users (107 v	dews)					
	on <i>(15 views)</i>		7. Fire	Safety Annual <i>(98 v</i>	views)					
8. Odavi	dson (15 views)		8. Expir	able Role <i>(98 view</i>	(5)					
9. Jharris	s (15 views)		9. Acc_	Training <i>(89 views)</i>	1					
10. Jhart	ley (15 views)		10. Acc	_Downloads (72 vi	iews)					

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.

Pacco	🔤 🕕 LMS Administrator 🍄	Logout			
Home My Course	s Electives Resource	es Transcript Com	nmunity ECommerce	e LMS Admin	
Reports Activit	Configuration			Active Team: All Members	•
General Settings					
	Admin Module: 📵	LMS Admin -> LMS (503)		V	
	Show Tab Bar: 🕕	•			
	Available Tabs: 🕕	Reports			
		Activity			
		Last 30 Days	 Activity Period 		
	Hide Active Team: 📵				
Update					

- 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 dropdown.
- 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 <u>Reports</u> 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.

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; <u>https://www.youtube.com/</u>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.

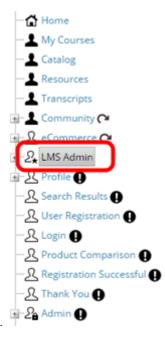
Create a New Page

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.

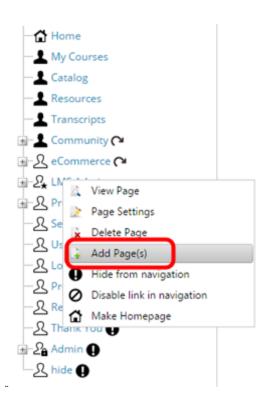
- While logged in with LMS Admin permissions, wave over the Admin tab in the upper DNN menu.
- Click on Page Management.

Admin	Tools Help	Modules - Pages	- Users -	
*	Event Viewer	File Management	Page Management	Recycle Bin
¢°	Security Roles	Site Settings	User Accounts	
*				

• Wave over LMS Admin.



• Right Click and select Add Page.



• Type Charts into the field provided, then click Create Page(s).

Pages:	Charts



 From there you will be allowed to set various settings, although you may just select Update Page.

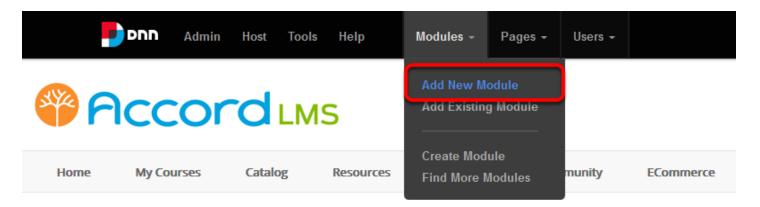
SEO	~
Metatags	~
Appearance	~
Link	~
Update Page More Settings	

Now **Charts** will display in your **LMS Admin** tab menu.

eCommerce	LMS Admin
	Catalog
	Enrollment
	My Team
	Configuration
	Reports
	Documentation
	Skin Settings
	Charts

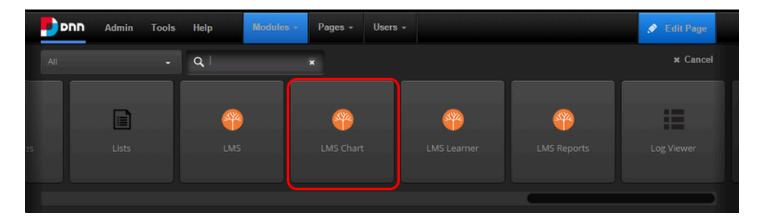
Add a New Chart Module

- 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.

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Initially, it will look like this, and will need to be **Configured** before a chart can display.

Chart	Configuration
Chart	
Chart Module	e needs Configuration.

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.

Chart	
Chart Module needs Configuration.	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%
Manziel	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%
H 4 1	N Page Siz	ze: 50 •					22 items in 1 page

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.

Configuration		Active Tea	am: All Members	•
General Settings				^
Chart Name: 🕦				
Report Type: * 🚯	< Select Report Type >	•		
Report Definition: * 🚯	< Select Definition >	•		
Chart Type: * 🚯	< Select Chart Type >	•		
Chart Data Types: * 🚯	< Select Chart Data Type >	•		
Chart Data Mapping: * 🜗				
X Axis Custom Label: 🕦				
Y Axis Custom Label: 🕦				

- 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**.

Accord LMS

- **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 <u>Reports</u>. 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.

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.

Report Columns	Chart Assignments
User Name	Text - Data (Count) and Primary Grouping
Folder Name	Text or Date - Secondary Grouping
LE Name	▼
Completion	▼
Success	▼
Date	▼
Time	T
Score	Ŧ

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.

	is Custom Label is Custom Label				
 Click Update and Regenerate. 					
	Update	Update and Regenerate	Reset	Cancel	

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.

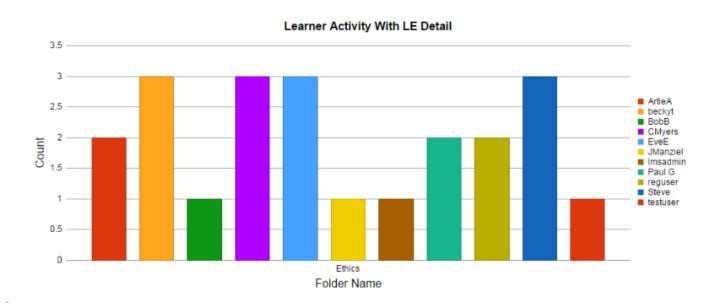
An Error Message can indicate several potential issues. There may have been improper drop-down menu selections or necessary fields left blank. Review settings and try again.

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** - <u>Introduction</u>, <u>Adding New Chart</u> <u>Modules</u> and <u>Configuration</u> 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 <u>Reports</u> section to learn how to generate reports.

Sample Pie Chart

Configuration of Chart

• Click/Tap on **Configuration**.

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Chart	Configuration					
Chart						
Chart Modu	le needs 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.

General Settings

Chart Name: 🚯	Role Activity-Most Active
Report Type: * 🕦	Role Activity: Most Active
Report Definition: * 📵	Role Activity Most Active
Chart Type: 🕇 🕕	Pie 🔹
Chart Data Types: * 📵	Text 🔻

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.

Report Columns	Chart Assignments
Role Group	•
Role Name	Text - Data (Count) and Primary Grouping 🔹
Attempt	•
Complete	•
In Progress	•
Not Attempted	•
Passed	•
Failed	•
Score	•
Passing	•

Update and Regenerate

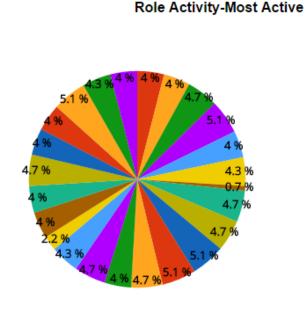
-

• Click/Tap **Update and Regenerate**.

Update	Update and Regenerate	Reset	Cancel

Pie Chart Display

Proper **Chart Configuration** used in conjunction with a suitable **Report Definition**, will allow your chart to display as desired.



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**.

Chart	Configuration
Chart	
Chart Modu	le needs Configurat

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.

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- **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.

Learner Activity Most Active	
Learner Activity: Most Active	•
Most Active	T
Bar	T
Text	•
	Learner Activity: Most Active Most Active Bar

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: 🕦	

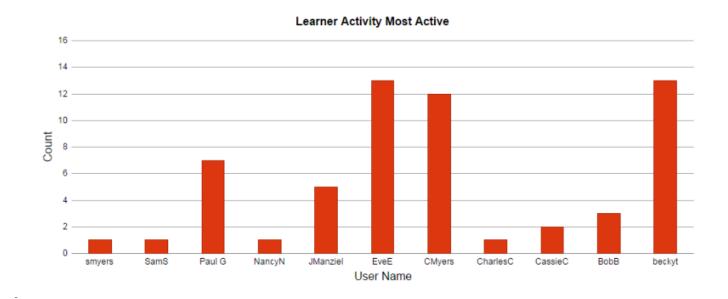
Update and Regenerate

• Click/Tap **Update and Regenerate**.



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**.

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Chart	Configuration					
Chart						
Chart Modu	le needs 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.

General Settings

Chart Name: 🚯	Most Utilized Learning Elements
Report Type: * 🕦	LE Utilization: Most Utilized
Report Definition: * 🕦	Most Utilized Learning Elements
Chart Type: 🕇 🕦	Line •
Chart Data Types: * 🚯	Numeric Sum; Text or Date

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.

Report Columns	Chart Assignments
LE Name	Text or Date - Primary Grouping 🔹
Attempt	Numeric Sum - Data
Complete	•
In Progress	•
Not Attempted	•
Passed	•
Failed	•
Score	•
Passing	Ţ

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

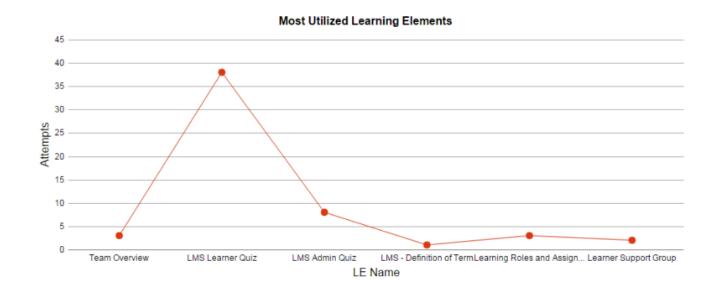
...

• Click/Tap **Update and Regenerate**.



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.

Chart Configuration
Chart
Chart Module needs Configuration.

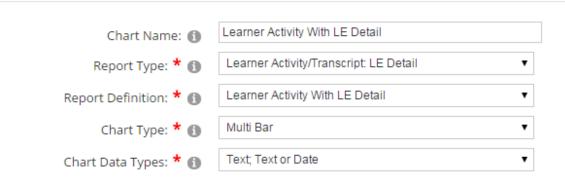
General Settings

- 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**.

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- **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



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.

Report Columns	Chart Assignments
User Name	Text - Data (Count) and Primary Grouping 🔹 🔻
Folder Name	Text or Date - Secondary Grouping 🔹
LE Name	T
Completion	T
Success	T
Date	T
Time	T
Score	T

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

-

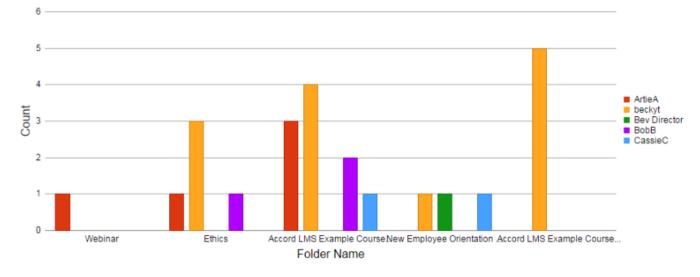
• Click/Tap **Update and Regenerate**.

Update	Update and Regenerate	Reset	Cancel

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**.

Chart	Configuration
Chart	
Chart Modul	le needs 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

General Settings

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.

Chart Name: 🕦	Learner Activity
Report Type: * 🚯	Learner Activity/Transcript: LE Detail
Report Definition: * 🚯	Learner Activity With LE Detail
Chart Type: * 🚯	Multi Line 🔹
Chart Data Types: * 🚯	Text; Text or Date

Report Columns-Chart Assignments

- In order to generate the Multi-Line chart in this example, it is necessary to use the dropdown 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.

Report Columns	Chart Assignments
User Name	Text - Data (Count) and Primary Grouping
Folder Name	Text or Date - Secondary Grouping
LE Name	•
Completion	▼
Success	▼
Date	▼
Time	▼
Score	•

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: 📵	
-		

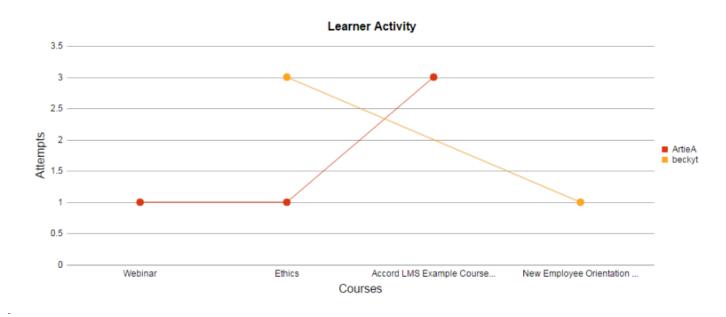
Update and Regenerate

• 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.

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: 📵	8
Date Rounding: 📵	O Day Month O 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

• 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: 🕦 Data Sort Order: 🚯	 Day Month Year Descending Ascending
Maximum Legend Items: 🕕	
X Axis Label Rotation: 🚯 Chart Colors: 🚯	1 📕 🔹 6
	2 📃 🔻 7 📕 👻 3 📕 🔻 8 📕 👻
	4 • • 9 • • • • • • • • • • • • • • • •
Update Update and Regenerate Reset	Cancel

^

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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.

Accord LMS		🗃 🛛 UMS Administrator 🍄 Logo
Home My Courses Electives Resour	ces 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: ()	0	
Available Table @ Available Table @ Gatowabaru / GatoTraning Tarce @ Attempte @ Jook Active Tamin Learner Module Referch @ Learner Module Referch @	# My Consti Mice Location Mice Locatio	
	Proxy User Proxy User Name:	
interval (in seconds) to send extra commits: ()	60	
Calendar		>
Electives		>
Transcript		>
Access		>
Templates		× ×
	Created: SuperUser Account on 22 January 2018 at 3:21:35 I	2M
Update		

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;

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- 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.

Accord	MS		🗷 🛛 LMS Administrator 🍄 Logout
Home My Courses Electives	Resources Transcript Communit	y ECommerce	LMS Admin
			8
Catalog Roles Teams	Actions Configuration		Active Team: All Members 🔹
Teams			Count
📕 🎯 All Members			
💶 Learners			6
🖬 Report Admin			0
👤 Team Admin			3
 Blue Ribbon Home Warranty Boston Office-North 	Team Details		
Engineering Crew	Team Content, Role and Portal Access		
	Team Access Codes		
	Send Team Message		
	LMS Admin Types		
	Add Child Team		
	Add child ream		

• Click the **pencil icon** next to the LMS Admin Type you want activate Learner Impersonation for.

Update

LMS Admin Types can only be edited by the Team that created them.											
Enable Pass Down Icon LMS Admin Type Name Creator Team											
K				•	Instructor Admin	All Members > Blue Ribbon Home Warranty					
	0	V		2	Team Admin	System					

• Expand the **Feature Permission** section.

Return

- Next to Learner Features, check box for Active Learner Selection.
- Scroll to bottom and click **Update** to save changes.

Feature Permission		~
Access Roles: 1	LMS Admin AccessLMS Reports Access	
LMS Admin Features: 🖲	 Catalog Roles Teams Actions Configuration 	
Report Features: 🕲	 Activity Chart Reports Configuration 	
Learner Features: 🛈	 Active Learner Selection Ability to launch LE with Conditions Ability to open Folder with Conditions Configuration 	
Learning Catalog Access		>
Learning Roles Access		>
Portal Access		>
Update Return		

To use this feature:

• Navigate to **My courses.**

- Input a valid **username** in the **Active Learner** Field.
- Click the circling arrow.

XY	F	lcco		IS				🜌 🜒 LM5 Administrato	r 🍄 Logout
н	ome	My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
My Co	ourses 🕨	LMS Learner Train	ning er Training					Active Learner: Agray	C
This open	ourse d	Start: Mon 30 M iemonstrates how tificate and print it	May 2016 to use the Accord	83% d LMS as a Learne . Learning Object	r. This course co ives Be able	onsists of 2 videos	and a short quiz. Or	nce you have passed the quiz, you w	View More
0	🖹 L	earner Experience							Launch
6	C	ommunity Feature	s						Launch
6	<u>/</u> u	MS Learner Quiz							Launch
0	I 0	ertificate of Compl	etion						Launch
۲		ccord Learner Trai ue 24 Jan 2017, 5:0			ime				Sessions
0	1 A	ssignment Upload							Launch
Θ	1 n	.T Test							Sessions
0		New Employee	Orientation						Open
								Search for Learning	Q.

Important Considerations;

- While this feature is enabled, any User assigned to this LMS Admin Type will maintain the ability to impersonate a Learner.
- Admin utilization will track all activity as the impersonated Learner.

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.

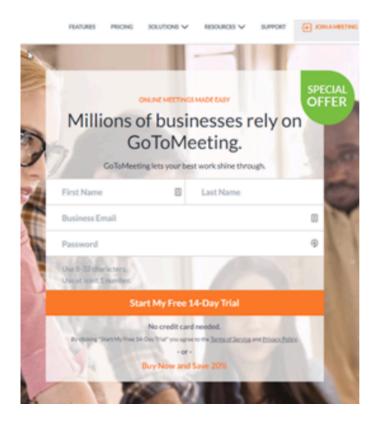
In order to use GoToWebinar or GoToTraining, you must have an active account for each. In order to use the apps as described below, you will also need an active developer account.

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 <u>GoToWebinar</u>.
- Click on **Start for Free** and fill out the necessary information to begin a 14 day free trial.

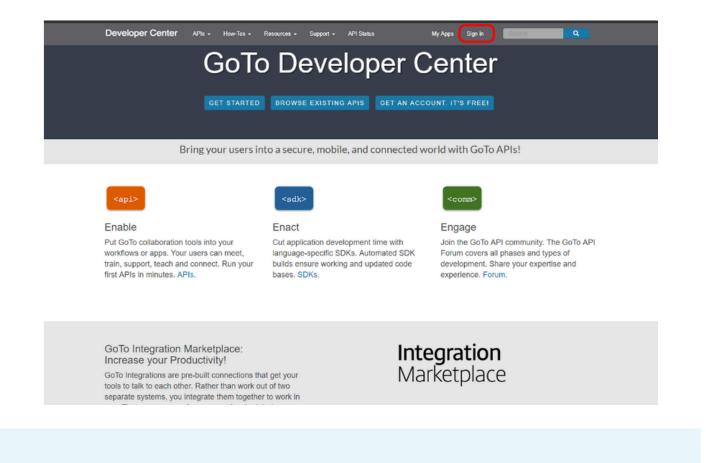
Please Note; As site information will occasionally update, images below are general representations and may vary somewhat from what you actually see while at the site.



Developer Account Setup

• Go to <u>https://goto-developer.logmeininc.com/</u> 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.



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.

APIs - How-Tos	Resources		API Status	My Apps	support@accordlm	•
p.						
				+ Ad	d a new App	
ore them!						
)	p.	p.	p.	p.	p. + Ad	p. Add a new App

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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.

Add App Home / My Apps / Add new app App Name * Webinar Demo Internal name: webinar-demo Edit Description * Product API * G Go To Training G Go To Training G Go To Meeting G Go To Meeting G Go To Meeting G Go To Meeting G Go To Assist G Go To Assist G Go To Assist G Go To Assist Corporate Application URL * Enter your own redirect URL for the OAuth flow. If you plan to use the Direct Login flow, enter "https://api.getgo.com" or any other URL.	
App Name * Webinar Demo Internal name: webinar-demo Edit Description * Product API * GoToTraining GoToTraining GoToMeeting	
Webinar Demo Internal name: webinar-demo Edit Description * I I GoToTraining GoToTraining GoToMeeting GoToAssist GoToAssistCorporate Application URL *	
Internal name: webinar-demo Edit Description *	C
Description *	C
Product API * GoToTraining GoToMeeting GoToWebinar GoToAssist GoToAssist GoToAssistCorporate Application URL *	C
GoToTraining GoToMeeting GoToWebinar GoToAssist GoToAssistCorporate Application URL*	C
GoToTraining GoToMeeting GoToWebinar GoToAssist GoToAssistCorporate Application URL*	C
GoToTraining GoToMeeting GoToWebinar GoToAssist GoToAssistCorporate Application URL*	G
GoToTraining GoToMeeting GoToMeetina GoToMebinar GoToAssist GoToAssistCorporate Application URL*	G
GoToTraining GoToMeeting GoToMeetina GoToMebinar GoToAssist GoToAssistCorporate Application URL*	
GoToMeeting GoToWebinar GoToAssist GoToAssistCorporate Application URL *	
GoToWebinar GoToAssist GoToAssistCorporate	
GoToAssist GoToAssistCorporate Application URL*	
GoToAssistCorporate Application URL*	
Application URL*	
Enter your own redirect URL for the OAuth flow. If you plan to use the Direct Login flow, enter "https://api.getgo.com" or any other URL.	
http://mycompany.com	

A 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).



Approved

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.

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Webinar demo			Approved				
Keys Products	Details Analytics	Edit "Webinar demo"	Delete "Webinar demo"				
Webinar demo's Ke	ys						
Consumer Key	Consumer Key t9qktTeuID0TwhhIOEVQSLN7QPSrw5cX						
Consumer Secret	qNMxBhuAgeo70rNf	=					

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**.

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ŀ	lome	My Courses	Electives	s Reso	ources	Transcript	Community	ECommerce	LMS Admin
	Catalog	Roles	Teams	Actions	Config	guration			Active Team: All Members
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	÷.	General Optior	15						
		Notifications							
		Folder Types							
	Ø	Learning Eleme	ent Formats						
	V	Status Types							
		Education Activ	rities						
	\gg	ILT Resources]					
	-	Role Based Rec	direction						
	1	Import Data							
	<u> </u>	Enhanced Feat	ure Status						
	*	Integration							
		License Key an	d Details						

- If necessary, click on the Locations heading to open this panel
- Click Add New Location.

ILT Resources

Return

Resources can only be edited by the Owner or their Parents				
Individual Instructors				>
Role Instructors				>
Locations				~
Drag a column header and drop it here to group by that column				
Display Name	Max Learners	Status	Owner	
S Corporate Headquarters	50	Active	All Members	
K (1) H Page Size: 20 V				1 items in 1 pages
Add New Location				

• 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.

n	
Name: * 🚯	
Status: 🕦	Active O Inactive
Location Type: 🚯	Physical - Class or Venue
Max Learners: 🕦	Physical - Class or Venue Virtual - General
GoTo Notifications: 🕕	Virtual - GoToMeeting
Information URL: 🕕	Virtual - GoToWebinar Virtual - GoToTraining Launch Information
Owner: 🚯	All Members 🔹
Team Availability: * 🕦	All Members
Description: 🕕	
	Normal E S S E E E E E E C Custom Links
Design HTML	

The screen will refresh and a **Consumer Key** field will display.

Accord LMS

- 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.

Location		>
Do not use the same GoTo account in different locati	ons.	
Name: * 📵		
Status: 🕕	Active O Inactive	
Location Type: 🚯	Virtual - GoToWebinar 🔹	
Consumer Key: * 📵		
Consumer Secret: * 🚯		
Connection Status:	You have to connect your application	
	Link with your GoToWebinar account	
Max Learners: 🕕		
GoTo Notifications: 🕥		
Information URL: ()	http://	tion
Owner: ()	All Members	
Team Availability: * 👔		
Description:	P Annenders	
+ • <u>Ф</u> • В <u>I <u>U</u> 8</u>	Normal	
	Custom Links	
Design HTML		

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**.

Confirm Save Location

Linking requires for your Location to be saved. If you proceed your Location will be saved with the current values.



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.

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Home My Courses	Electives	Resources	Transcript	Community	ECommerce	LMS Admin	
Catalog Roles	Teams A	ctions Confi	guration			Active Team: All Members	•
Catalog							0
Copy To * My Catalog Grophans First Aid Certi Self-Enrollme OSHA Driver: O Distracted	nt Catalog - Healti Safety		Remove /	Delete			
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🕨 🗆 👤 Annual Sa		rkshop		LE Details LE Conditions & Lim	ite		
				LE Completion Even			
			(LE Sessions			

Select the VILT Session you desire to set Utilization Tracking for and click on it's adjacent pencil icon to edit.

LE Sessions

Accord Learner Tr	aining \	Workshop						\sim
Refresh								J 📓 🕎
Name		Start Date	Location	Instructor	Min	Max	Registered	Waitlisted
	± 🝸	T		T	7		T	T
🕖 🖳 Welcome Wel	binar	27 Mar 2020	Webex	Charles Cooper	1	unlimit	ed 0	0
	Page Size	e: 20 🔻					1 items	in 1 pages
Refresh								2 2

- Using the dropdown menu for Utilization Tracking, select "Complete" on All poll questions answered.
- Click **Update** to save changes.

Session Details

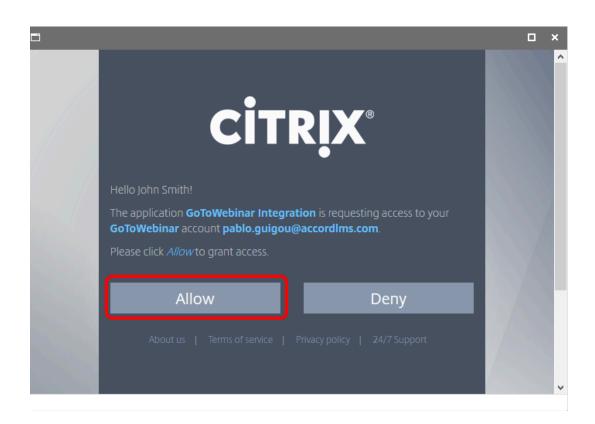
General Settings	~
Name: * 🛈	Welcome Webinar
Start Date Time: * 🛽	03/27/2020
End Date Time: * 0	03/27/2020 III 10:00 PM
Time Zone: 🕕	(UTC-07:00) Mountain Time (US & Ca 🗸
Location: 🛈	□ Use Learner's Timezone GoToWebinar ✓ ☑ Create Session on GoToWebinar
Utilization Tracking: 0	None "Complete" on Open
Instructor: 0	"Incomplete" on Open "Complete" on All poll questions answered
Notifications	>
Advanced Settings	>
Update Delete Copy	Cancel

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.

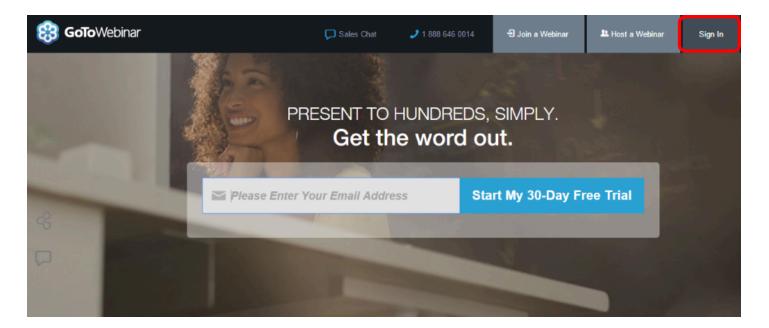
Location has been linked correctly, your location will reload in 3 seconds

The **Connection Status** field will update and display that your application will remain connected and active for a period of approximately 30 days.

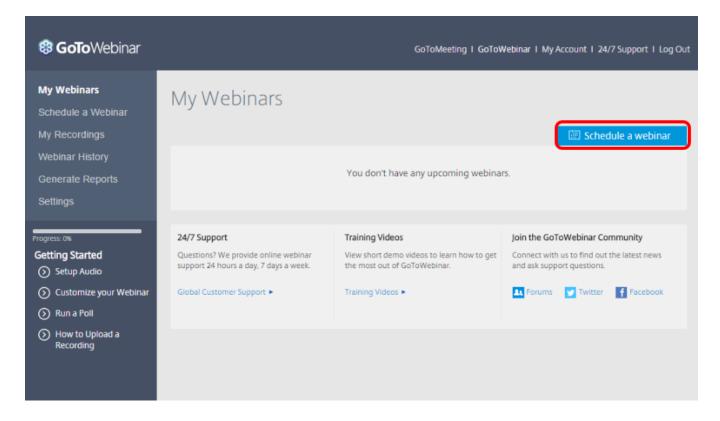
Create a Webinar

Navigate to; <u>https://www.gotomeeting.com/webinar</u> and **Sign In** using your registered user account credentials.

A This must be a separate account from the account used on Citrix's developer site.



• 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

🕫 GoToWebinar	GoToMeeting GoToWebinar My Account 24/7 Support Log Out
My Webinars Schedule a Webinar	Schedule a Webinar
My Recordings Webinar History	Title: More on Scheduling Employee Induction Webinar On the next page, you will be able to customize your webinar, invite
Generate Reports Settings	Description: An overview of the costs of a new starter joining your business
Progress: 0% Getting Started Setup Audio	Pointers on how to go about engaging your business in putting together a suitable program to protect the investment you have made in attracting and recruiting your new employee:
 Customize your Webinar Run a Poll How to Upload a 	Type One Session Series Sequence
Recording	Start Date Mon, Mar 9, 2015
	Start Time End Time 3:00 PM ▼ 4:00 PM ▼
	Webinar Time Zone (GMT-07:00) Arizona
	Webinar language English
	Schedule

• Immediately after the slash following webinar, copy the numerical digits of the **Browser URL**, not the Registration URL.

dashboard.gotowebinar.com/#/webinar/2491172687679449602
SETTINGS
BRANDING & COLORS
SHARE EVENT
INVITE YOUR ATTENDEES Registration URL https://attendee.gotowebinar.com/rt/5139445399224445698 Webinar ID

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.

Pccord LMS	■ 0 LMS Administrator 🍄 Logout
Home My Courses Electives Resources Transcript Community ECommerce	LMS Admin
Catalog Roles Teams Actions Configuration	Active Team: All Members
Catalog	
Copy To Move To Remove / Delete My Catalog	0
🖌 🗆 📷 Sample - Accord LMS Content 🛛 🤤	
Sample - LMS Learner Training LE Details	
Welcome to the A	
🗆 🖥 Accord LMS Leari LE Conditions & Limits	
Carl Learner T LE Completion Events	
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Image: Sample - LMS Learner Resources	
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🕨 🗆 🖬 Accord Plus Courses 🛛 🤤	

• Click Add New Session.

Accord Learner Trainin	g Workshop						
Refresh							è 🖉 😫
Name	Start Date	Location	Instructor	Min	Max R	egistered	Waitlistee
T		T	T			T	
🖉 🤽 Introduction	24 Jan 2017	Raritan Plaza	John Davidson	1	unlimited	11	0
🖉 🤽 Welcome Webinar	15 Sep 2016	WebEx	Alexandra Rideout	1	unlimited	2	0
H I Page Siz	e: 20 🔻					2 item	s in 1 page
Refresh							🕹 💥 🗒
Add New Session							
Return							

• 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.

New Session		
General Settings		^
Name: * ① Start Date Time: * ① End Date Time: * ①	Employee Induction Webinar 03/28/2017	
Time Zone: 🛈	□ Recurrence (UTC-03:00) Montevideo	
Location: 0	<select location=""></select>	
Instructor: 🖲	Corporate Headquarters [max 50]	
Notifications	Crimson Innovations [max 30] GoToWebinar Neo Magna Room [max 450]	~
Advanced Settings	Raritan Plaza [max 50] SAP Australia (Melbourne) [max 30]	~
Update Cancel	SAP Australia Sydney (Sydney) [max 35] Training Choice Adelaide [max 30] Training Choice Brisbane [max 40] WebEx	

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**.

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Your new GoToWebinar session is ready to use.

Accord Learner Training Workshop

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	Name	Start Date	Location	Instructor	Min	Max	Registered	Waitlisted
	T		T	T		[T	T
2 👱	Employee Induction Webinar	28 Mar 2017	GoToWebinar	AshleighGray	1	unlimited	0	0
2	Introduction	24 Jan 2017	Raritan Plaza	John Davidson	1	unlimited	11	0
2 🙎	Welcome Webinar	15 Sep 2016	WebEx	Alexandra Rideout	1	unlimited	2	0
	▲ 1 ▶ ▶ Page Size:	20 🔻					3 item	s in 1 pages
Re	fresh							🛓 🖉 🕎

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- (1) You can use the same GoToWebinar location for all of your GoToWebinar ILT sessions.
- 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	Туре	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 <u>https://cloud.scorm.com</u>. 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**.

Admin H	Host Tools Help	Modules - P	Pages + Users +		🖍 Edit Page	
Accord				1	Edit This Page Stay in Edit Mode	Logout
Home My Courses	Catalog Resources	Transcript	Community	ECommerce LM	View in Layout Mode	
Contact Us First Name:* Last Name:*					Mobile Preview Page Settings Page Appearance Page Localization Page Permissions Export Page Delete Page Make Public	
Emal:*						
Job Title:						

• Select Setup completion events after the users has submitted the form.

Image: Wight of the second lense Home My Courses Catalog Resources Transcript Community Ecommerce LMS Admin Image: Community Ecommerce Image: Community Ecommerce LMS Admin Image: Community Ecommerce Image: Community Ecommerce LMS Admin Image: Community Ecommerce LMS Admin Image: Community Ecommerce LMS Admin Image: Community Ecommerce LMS Admin Image: Community Ecommerce Image: Community Ecommerce Ecommerce LMS Admin Ecommerce Ecomm	Admin Host	Is Help Modules - Pages -	Users +	🖍 Edit Page
Home My Courses Catalog Resources Transcript Community ECommerce LMS Admin Minime Forms Quick MENU DYNAMUC FORMS DRAG & DROP DYNAMUC FORMS QUICK HELP QUESTION WIZARD DUNNCED WIZARD Image: Drive the point of the	Accord.	15	🔤 🕕 Supe	rUser Account 🍄 🕴 Logout
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• In the dropdown menu for **Select Event** choose **EmailNotification(Email)**.

Form Completion Events				^
Fasily sature quarte for your dynamic forme. Deced u	oon field values you san Cand	the uper to a part UDL event	a 501 guard ar distribute an	
Easily setup events for your dynamic forms. Based u email.	oon held values you can send	the user to a new ORL, execute	a SQL query, or distribute an	
Select Event: 🕕	- Select Event -		~	
Event Name: 🕕	- Select Event -			
Event Sort Order: (1)	EmailNotification(Email) ConfirmationPage(redirect)			
Event Type: 🕕	 URL / Page Redirection Dynamic Email 	Dynamic SQL Statement		
	HTTP Post	Create PDF File		

• Scroll down to see the fields where you can change the necessary information.

st@accordIms.com
Js [Company Name]
st@accordIms.com
message. These parameters will be replaced with the email is sent.
Js - \$(FirstName) \$(LastName)
Basic Text Box Rich Text Editor
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Design HTML Preview

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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.

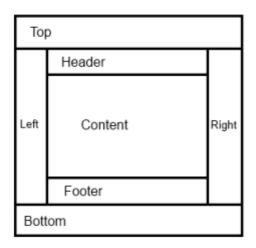
LEED Certifica	ition	
Webinar #1 - D	aylighting Design Judith Christ AIA, P.E. Senior Engineer, Architectural Energy Corporation, LEED AP Presents the basic concepts and strategies of effectively integrating daylighting design into a new building. She discusses daylighting design goals, the importance of daylighting controls, and how to balance daylighting with the electric lighting system.	Completed Lounch Content
Webinar #2 - 1	ntegrated Energy Design Ron Hollingsworth President, Architectural Energy Corporation, FAIA, NCARB, LEED AP Presents the basic concepts and benefits of integrating energy efficiency strategies into the design of a new building. He discusses each step of the IED process and provides insight on how to integrate IED into the architectural process.	Completed Launch Content
Webinar #3 - T	he Basics and Benefits of Commissioning Thomas Kahili E.I., LEED AP, Santos Sustainable Solutions Discusses the basics and benefits of integrating commissioning into new and existing buildings. Starting with basic definitions and goals, he explores how to outline clear objectives, why commissioning is necessary, and what tasks to use.	Not Viewed Launch Content
LEED Certificat	ion Exam Comprehensive Final Exam Exam will cover all information presented in the Webinars. Reference materials and web resources can be utilized. One hour time limit.	Not Viewed Launch Content
LEED Certificate	e Course Completion Certificate PDF Certificate showing your name, the course name and the certification date. Suitable for printing and framing.	Not Viewed

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.lcon.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.lcon.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] – 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 */

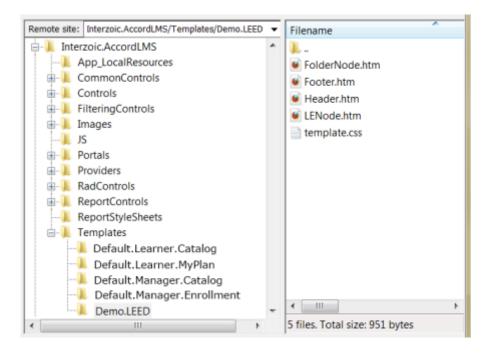
.DisplayPC { display: none; }

.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;} .DisplayiPhone { display: visible;}

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;">

```
<div
style="padding: 0px 0px 4px 0px;">[NAME]</div>[DETAILS]
```

```
<div>[STATUS]</div><br>
```



```
<a onclick="[LELAUNCH]" href="javascript:void(0);">Launch
Content</a>
```


</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.

~

Templates		
My Plan Template: 🚯	Default.Learner.icon.MyPlan	~
Calendar Template: 🚯	Default Learner.lcon.Calendar	\sim
Resources Template: 🚯	DefaultLearner.lcon.Resource	\sim
Catalog Template: 🚯	Default Learner.lcon.Catalog	~

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

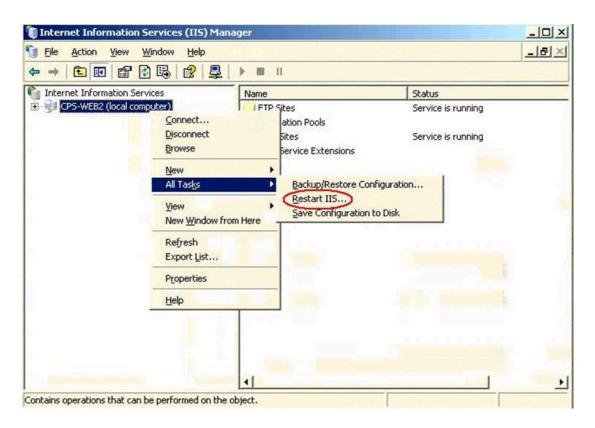
fl∨	video/x-flv
mp3	audio/mpeg
mp4	video/mp4
swf	application/x-shockwave-flash

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.

The screen shots show flv-application/octet-stream, which also works but video/x-flv is better.

🕡 Internet Information Services (IIS) Manager		
🕼 Ele Action Yew Window Help		<u>_181 ×1</u>
Internet Information Services Internet Information Services </th <th>Ifter Several (here second Ifter Several (here second Ifter Invarplication (hocket second India Inplication (hocket second India Inplic</th> <th></th>	Ifter Several (here second Ifter Several (here second Ifter Invarplication (hocket second India Inplication (hocket second India Inplic	

• 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.

4	LMS	The LMS module provides Admin access to the core LMS features to manage the Learning Catalog, Learner Enrollment, Teams and many other features. The LMS Learner module provides Learners customized access to their Learning Catalog and Transcripts. The LMS Reports module provides LMS Administration utilization reports for their assigned Learners and Learning Content.	4.2.3	Yes	~ 🖸
4	LMS Learner	LMS Learner module provides Learner access to their customized Learning Catalog and Transcripts.	4.2.3	Yes	× 🗇
4	LMS Reports	The LMS Reports module provides Admin utilization reports for their assigned Learners and Learning Content.	4.2.3	Yes	1

• Click **Uninstall Package** to begin the uninstall process.

Name: 🚯	Interzoic.AccordLMS.Learner
Туре: 🚯	Module
Friendly Name: 📵	LMS Learner
Description: 📵	LMS Learner module provides Learner access to their customized Learning Catalog and Transcripts.
Version: 🕦	4.0.0
License: 🕦	Please review the Accord LMS End User License Agreement (opens in new window)
Delete Files?	
Uninstall Package Return	

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.