1) Home Tab ................................................................. 1
  1.1) Admin home .......................................................... 2
  1.2) My profile ............................................................. 4

View my profile ................................................................... 5
Edit my profile ................................................................... 5
Change password .................................................................. 6

2) Users Tab ..................................................................... 8
  2.1) User list ................................................................... 8
  2.1.1) Managing Users: View user profile ....................... 9
  2.1.2) Managing Users: Edit user profile ....................... 10
  2.1.3) Managing Users: User assignments ..................... 11
  2.1.4) Managing Users: User security roles .................. 11
  2.1.5) Managing Users: User transcripts ...................... 14
  2.2) Add user .................................................................. 14
  2.3) Enrollment requests ............................................... 15

3. Courses Tab .................................................................. 17
  3.1 Courses .................................................................. 17
  3.1.1 Locate Courses ....................................................... 17
  3.1.2 Manage courses .................................................... 19
  3.1.3 Managing Courses: View course details ............... 19
  3.1.4 Managing Courses: edit course ......................... 20
  3.1.5 Managing Courses: Assignments ....................... 21
3.1.6 Managing Courses: Curricula ................................................................. 22
3.1.7 Managing Courses: Course statics ......................................................... 23
3.2 Course categories ...................................................................................... 24
3.2.1 Managing Course Categories ................................................................. 26
3.2.2 Managing Categories: view category .................................................... 26
3.2.3 Managing Categories: edit category ...................................................... 26
3.2.4 Managing Categories: edit course category members ......................... 27
3.3 Curricula ..................................................................................................... 28
3.3.1 Managing Curricula: view curricula ...................................................... 28
3.3.2 Managing Curricula: edit curricula ....................................................... 29
3.3.3 Managing Curricula: edit members ....................................................... 30
3.4 Assessments ............................................................................................... 31
3.4.1 Adding Assessments .............................................................................. 31
3.4.2 Managing Assessments ......................................................................... 33
3.4.3 Managing Assessments: view assessments .......................................... 34
3.4.4 Managing Assessments: edit assessments ............................................ 35
3.4.5 Managing Assessments: questions ....................................................... 35
3.5 Forums ....................................................................................................... 45
3.5.1 Managing forums: view forum ............................................................... 45
3.5.2 Managing forums: edit forum ............................................................... 46
3.5.3 Managing forums: audience ................................................................. 47
3.6 Surveys ....................................................................................................... 48
3.6.1 Adding Surveys .................................................................................... 48
# Table of Contents

3.6.2 Viewing Surveys .................................................................................................................. 49
3.6.3 Editing Surveys .................................................................................................................. 50
3.6.4 Editing Questions ............................................................................................................... 51
3.6.5 Survey assignments .......................................................................................................... 54
3.6.6 Survey results .................................................................................................................... 55

3.7 Elective Requests .................................................................................................................. 55

4) Assignments Tab ...................................................................................................................... 57

4.1 Student assignment search .................................................................................................. 57

4.1.1 Viewing training assignments .......................................................................................... 59
4.1.2 Editing training assignments ............................................................................................. 59

4.2 Elective Group Assignments ................................................................................................. 60

4.2.1 Managing elective assignments: view ............................................................................... 60
4.2.2 Managing elective assignments: edit ............................................................................... 61
4.2.3 Managing elective assignments: content ......................................................................... 62
4.2.4 Managing elective assignments: audience ...................................................................... 63

4.3 Add assignment .................................................................................................................... 64

4.3.1 Assign Mandatory Training to Users ............................................................................. 64
4.3.2 Assign Elective Training to Users .................................................................................... 66

5) Reports Tab .............................................................................................................................. 69

5.1) Standard Reports ............................................................................................................... 69

5.1.1 Building Reports ............................................................................................................. 70
5.1.2 Favorite Reports ............................................................................................................... 71

5.2) Managing my reports ......................................................................................................... 72
### Learning Management System

#### Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.3 Building an ad hoc report</td>
<td>73</td>
</tr>
<tr>
<td>6) Organization Tab</td>
<td>75</td>
</tr>
<tr>
<td>6.1 Organization Tree</td>
<td>75</td>
</tr>
<tr>
<td>6.1.1 View organization</td>
<td>75</td>
</tr>
<tr>
<td>6.1.2 Edit node</td>
<td>76</td>
</tr>
<tr>
<td>6.1.3 Add node</td>
<td>77</td>
</tr>
<tr>
<td>6.2 Security roles</td>
<td>78</td>
</tr>
<tr>
<td>6.3 Group types</td>
<td>80</td>
</tr>
<tr>
<td>6.3.1 Managing user groups: view user group</td>
<td>81</td>
</tr>
<tr>
<td>6.3.2 Managing user groups: edit user group</td>
<td>81</td>
</tr>
<tr>
<td>6.3.2 Managing user groups: edit members</td>
<td>82</td>
</tr>
</tbody>
</table>
1) HOME TAB
The Home Tab is the default selected tab after logging into your LMS. All tasks described in this section are located in the Home tab.

In this first page, you can find the following links:

**Instructor View**: click to turn to the LMS Instructor view. ( * ) Your current VIEW is shown at the right.

**Student View**: click to turn to the LMS student view. ( * ) Your current VIEW is shown at the right.

**Help**: you can click on this link to contact IHRDC Technical Support. This will open a new window with our contact information.

**Today's date**
Your **Name** and **Last name**: when clicking on this link, you access the options to see your profile (**My Profile**) and to log out (**Log Off**).
NOTE: My profile will be described at 1.2) My profile menu

Seven main tabs: Home, Users, Courses, Assignments, Reports, Organization and System.

1.1) Admin home
This page is divided into three parts:
1) Products Oil & Gas Business, Upstream Technology, Operations & Maintenance and Business Essentials:
Each of the four boxes correspond to an e-Learning product. Click on any box to access a customized course catalog for that particular product.

2) Contact Us:
When you click this button you will be directed to a new tab, where you can submit a customer support ticket. After you fill in the information, click on Submit Support Request. The IHRDC support team will use this ticket to track your request.

3) Support Center:
When you click on Support Center, you will be directed to a new tab. Here you can find tips and tricks on using the LMS and answers to frequently asked questions. You also have the option to submit a customer support ticket.

4) System check:
You can use this tool to check your computer’s performance and compare your system’s information to IHRDC’s system requirements. A green checkmark indicates that your system meets the minimum requirements. Red Xs indicate that your system does not meet the minimum requirements to run a course properly.

Announcements are messages created by administrators to provide important information to the users. Only the announcement titles are displayed in the information console. The remaining details on each announcement can be viewed by clicking the information icon next to the announcement title.
Adjust your report to your needs by selecting an option from the corresponding filters. Position your mouse over the data that you want more information about and click. **NOTE:** When dragging your mouse over information, a *hand* icon will indicate what data has remaining details to see.

**1.2) My profile**  
You can access your profile by clicking on *my profile*.
This section shows you your user information.

- See your profile: click on view my profile
- Edit your profile: click on edit my profile
- Change your password: click on change password

View my profile

You can view your profile and other contact information like username, name, address, etc.

Edit my profile

To edit your profile, click on edit my profile. The fields marked with asterisk (*) are required.
1) After you make your changes, click **update** to save your changes.
(2) Click **cancel** if you do not wish to save changes.

**Change password**

To change your password, click on **change password**. The fields marked with asterisk (*) are required.
(1) After you make your changes, click **update** to save your changes.
(2) Click **cancel** if you do not wish to save changes.
2) USERS TAB

In this section, we will demonstrate the various tasks required to manage users. In this manual, anyone who interacts with the LMS is identified as a ‘User’.

Administrative tasks for User management include the ability to create and edit user profiles; modify group memberships and security roles; view current training assignments and training transcripts.

All tasks described in this section are located in the Users tab.

2.1) User list

Administrators can manage or view a variety of information about users. Existing users have a profile, which can be edited. Administrators can also edit User Group memberships and Security Roles or view current user assignments or transcripts containing completed courses and curricula.

To complete any of these tasks for a specific user, you must first locate the User in the LMS. Existing users can be located in one of two ways:

OPTION 1: use the search button
(1) Complete at least one of the criteria to search for a user.
(2) Click the add user groups to search button to expand the filter options for groups.
(3) After completing the filter criteria, click the search button.

OPTION 2: use the Filter by User filter

Use the advanced filtering features to quickly locate the user. The system uses the user's last name to search.
Independently of the option you used to search, the system will show the result of the search at the bottom of the page.

(1) Click on Last name, First name, Username, Last login or Active to change the ordering of the information. You can only order by one column at a time.
(2) In order to manage or view the variety of information about users, click on the manage button next to the desired user in the list.
   NOTE: See the following steps in 2.1.1 Managing users item.
(3) Click the user e-mail address button to write an e-mail from your Outlook box.
(4) Export the displayed information to an Excel file.

2.1.1) Managing Users: View user profile

After clicking the manage button on the users list, a User profile summary will be displayed with the following read-only properties:
2.1.2) Managing Users: Edit user profile

Click on the edit user profile link located in the side menu. The fields marked with asterisk (*) are required.
(1) Once the user’s information has been edited, click **update** to save your changes. If your update was successful, you will be redirected to the **view user profile** page for this User.
(2) Click **cancel** if you do not wish to save changes.

### 2.1.3) Managing Users: User assignments

Click on the **assignments** link located in the side menu. The user’s assigned courses and/or curricula will be displayed.

(1) Click on the ‘+’ button to the left of the displayed items to view details about assigned individual courses or the required courses included in a curriculum.
(2) Click on the **add new assignment** button located below the existing assignment list. You will be redirected to the **Assignment** tab. See 4) Assignments Tab section of this guide to view the assignment process steps.

### 2.1.4) Managing Users: User security roles

Click on the **security roles** link located in the side menu. This task allows administrators to modify an existing User’s Security Roles. Security roles are security settings that determine what views or tasks a user is authorized to access. The three predefined Security Roles are Student, Instructor, and Administrator.
(1) When you check the Admin Role, you have to choose between Full Admin or Custom Admin. If you choose the Custom Admin option, the following options will be shown:

For a description of Security Roles related to functions access, view the following table:

<table>
<thead>
<tr>
<th>TAB ACCESS</th>
<th>Full Admin</th>
<th>Custom Admin</th>
<th>Instructor</th>
<th>Asst. Instructor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to Users</td>
<td>Yes**</td>
<td>Yes †**</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Access to Assignments</td>
<td>Yes</td>
<td>Yes †</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Access to Organization &amp; System Tabs</td>
<td>Yes</td>
<td>Yes †</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Access to Reports Tab</td>
<td>Yes</td>
<td>Yes †</td>
<td>Limited to 4 course reports</td>
<td>Limited to 4 course reports</td>
</tr>
<tr>
<td>TAB ACCESS</td>
<td>Full Admin</td>
<td>Custom Admin</td>
<td>Instructor</td>
<td>Asst. Instructor</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------</td>
<td>--------------</td>
<td>------------</td>
<td>------------------</td>
</tr>
<tr>
<td><strong>Access to Courses Tab</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View Session Information</td>
<td>Yes</td>
<td>Yes †</td>
<td>Yes *</td>
<td>Yes *</td>
</tr>
<tr>
<td>View Session Roster</td>
<td>Yes</td>
<td>Yes †</td>
<td>Yes *</td>
<td>Yes *</td>
</tr>
<tr>
<td>Manage session assessments</td>
<td>Yes</td>
<td>Yes †</td>
<td>Yes *</td>
<td>Yes *</td>
</tr>
<tr>
<td>Manage session homework</td>
<td>Yes</td>
<td>Yes †</td>
<td>Yes *</td>
<td>Yes *</td>
</tr>
<tr>
<td>Edit session</td>
<td>Yes</td>
<td>Yes †</td>
<td>Yes † *</td>
<td>No</td>
</tr>
<tr>
<td>Register users</td>
<td>Yes</td>
<td>Yes †</td>
<td>Yes † *</td>
<td>No</td>
</tr>
<tr>
<td>Record user completion</td>
<td>Yes</td>
<td>Yes †</td>
<td>Yes † *</td>
<td>No</td>
</tr>
<tr>
<td>Manage Course Categories</td>
<td>Yes</td>
<td>Yes †</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Manage Curricula</td>
<td>Yes</td>
<td>Yes †</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Manage Assessments</td>
<td>Yes</td>
<td>Yes †</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Manage Surveys</td>
<td>Yes</td>
<td>Yes †</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Manage Elective Requests</td>
<td>Yes</td>
<td>Yes †</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

To add Security Role(s), click an empty select box next to the desired Security Role. To remove a role, uncheck the select box next to the appropriate Security Role.
(1) Click the **update** button to save this user's Security Roles.
(2) Click **cancel** if you do not wish to save changes.

### 2.1.5) Managing Users: User transcripts

Click on the **transcripts** link located in the side menu. This task will allow you to view transcripts of completed courses and curricula.

**Managing Users:**

![User Management Interface](image)

(1) To view a copy of certification, click on the **View Certificate** icon to the left of the transcript.
(2) Click on the underlined course name to view more details.

### 2.2) Add user

Every user has a profile. This profile is essential to track administrative and student training activities. User specific information includes identity, locale, and contact information, as well as organization data and system status. Select the **add user** link located in the **Users** tab.

Complete the user profile. The fields marked with asterisk (*) are required.
(1) Click a **Job Category** from the list to select it. You can choose more than one job category.

(2) Once the User’s information has been defined, click the **add** button to create the User. If your addition was successful, you will be redirected to the **view user profile** page for this user.

(3) If you need to add more than one user, use the **add & another** button.

### 2.3) Enrollment requests

This task allows administrators to manage requests from users who would like a username and password to access the system. While managing these requests, administrators have access to information necessary to determine if a request should be approved or denied.

Once a request has been approved, the user or users will be created where the administrator can assign courses if necessary. Denied requests are simply marked as denied and removed from the queue.

The user Enrollment feature is disabled by default, (i.e.: set to “none”) and must be enabled in the System tab before user enrollment requests can be made. To enable User enrollment, you must choose between “Automated” or “Verified”. “Automated” will create users automatically. “Verified” will
require an admin to go through the approval process before the student account may be created. Administrators have the option to process requests individually or process multiple requests with similar properties. Administrators also have the option to email users when processing a request. Slight differences exist between the two methods. For example, processing requests individually allows administrators to override enrollment code properties while processing multiple requests does not. If an email address was provided by the requestor it will be used as the username and can be modified by processing the request individually. Likewise, requests that do not have an email can only be processed individually because the system does not assign a username and thus must be specified by the admin.

(1) Select an Enrollment code to manage from the drop down list located above the list of requests. Once you have selected an enrollment code, use the advanced filtering features to quickly locate the user.

(2) Click on the manage button next to a user in the list of requests to process this user only.

(3) Process multiple requests: Check the select boxes next to the user requests you would like to process, then click the manage selected users button to process these requests.

   NOTE: Select boxes are grayed out if the user did not provide an email with their request.
3. COURSES TAB

In the LMS, an administrator can create multiple course types that will be made available for training including Web-based training (WBT) courses and training activities. Administrative activities for Course Management allow you to create and edit courses, course categories or curricula.

All tasks described in this section are located in the **Courses** tab.

3.1 Courses

Clicking the **Courses** tab shows the list of courses by default. From this tab you can view or manage existing courses and create new ones.

3.1.1 Locate Courses

To view or manage courses you may search for specific courses using the filtering options:

**OPTION 1**: use the **search** button

1. Complete at least one of the criteria to search for a user.
2. Click the **add course categories to search** button to expand the filter options for categories.
3. After completing the filter criteria, click the **search** button

**OPTION 2**: use the **Filter by Course** filter
Use the advanced filtering features to quickly locate the course. The system uses the course’s **Course Name** to search.

Independently of the option you used to search, the system will show the result of the search at the bottom of the page.
(1) Click on **Course Name**, **Course Type** or **Course Code** to change the ordering of the information. You can only order one column at a time.
(2) Click the `manage` button next to the course you need to view or edit.
(3) Total number of courses found applying the search filter.
(4) Use the navigation tools to review the course list results and/or to locate a specific course.

### 3.1.2 Manage courses

Administrators can manage or view a variety of course information. Existing course properties may be updated and courses may also be assigned to one of more existing curricula. Statistical information is also available to administrators summarizing course assignments, as well as course completion statistics.

To complete any of these tasks for a specific course, you must first locate and manage the desired course, clicking the `manage` button as we saw in the last figure. A set of new action tabs will appear inside the **Courses** tab.

### 3.1.3 Managing Courses: View course details

This is the first view that you see after clicking the `manage` course button. This task will allow you to view an existing course’s read-only information.
NOTE: The displayed information varies depending on the Course Type property.

3.1.4 Managing Courses: edit course

This task will allow you to edit an existing course’s information and properties.

Click on the edit course link located in the side menu. The fields marked with asterisk (*) are required.
NOTE: The displayed information varies depending on the Course Type property.

(1) Once the course’s information has been edited, click update to save your changes. If your update was successful, you will be redirected to the view course details page for this Course.
(2) Click cancel if you do not wish to save changes.

3.1.5 Managing Courses: Assignments

This task allows you to view a course’s existing training assignments. Click on the assignments link located in the side menu.

The details of how a course has been assigned and to how many users it has been assigned too will be displayed in a table. This page also allows you to add a new training assignment for this course.
(1) Click the *add new assignment* button to add a new training assignment for this course. You will be redirected to the *Assignment* tab. See 4) *Assignments Tab* section of this guide to view the assignment process steps.

### 3.1.6 Managing Courses: Curricula

This task allows you to manage these memberships and view properties for the curriculum. Click on the *curricula* link located in the side menu.

From this point, the administrator has multiple options; view the details of an existing curriculum membership, delete a course from a curriculum or add the course to a new curriculum.

NOTE: Each course can be a member of multiple curricula.
(1) To view details of an existing curriculum membership, click on the view button located next to a curriculum in the curriculum list.

(2) Click on the delete icon to the far right of the curriculum located in curriculum list.

   NOTE: A safe practice is to not modify the courses in a curriculum while the curriculum has assignments that have a status of Not Completed.

(3) Click on the add course to curriculum button to add the course to a new curriculum. A new pop up window will appear. Define the required properties:

   ![ADD COURSE TO CURRICULUM]

   NOTE: A safe practice is to not modify the courses in a curriculum while the curriculum has assignments that have a status of Not Completed.

   NOTE: Listed curricula are previously created in Courses, curricula page. See 3.3 Curricula to learn more about curricula.

   (1) Prerequisite: A list of courses will be displayed when a curriculum is selected. Selecting a course will define this course as a prerequisite for the course being managed.

   (2) Click the add button to insert the course into the curriculum. If the add was successful, you will be redirected to the curricula page for this course.

### 3.1.7 Managing Courses: Course statics

This task allows you to view current course statistics. These statistics represent the status of all training assignments involving this course as well as all elective training involving this course.

   The possible statuses are:

   - Not Attempted
   - Incomplete
   - Completed
   - Passed
   - Failed
   - Browsed (Web-based training courses only)
3.2 Course categories
Course categories are used to group similar courses into their own categories. You must first group categories by category type groups.

(1) To work with an existing category type, select it from the list. This will be the current category type.
(2) Click on the edit button to modify or view the current category type.
(3) Click add category to category type button to create a new category associated to the current category type.
(4) Click add new category type button to create a new one. A pop up menu will appear.
(1) The **Is Required** category type will appear as a new property when creating a new course. Category Types with the **Is Required** property selected will be a required field to select in the course definition. This property will also be combined with the **Selection Type** property.

(2) The **Selection Type** category type will appear as a new property when creating a new course. Category Types with the **Multiple Selections** property selected will accept to choose more than one category. Instead a **Single Selections** category type will accept only one category to choose. This property will be combined with the **Is required** property.

NOTE: Look at the following practice example to understand the result of combining the **Is require** and **Selection Type** category type's properties:

NOTE: Snapshot taken from **add new course** page or **edit course** page. These categories will appear only if you had previously created them. These category type names are only an example for this guide.
### 3.2.1 Managing Course Categories

Locating existing course categories is accomplished by selecting a category type and locating the desired course category from its list.

![Image of course categories](image)

(1) Click the **manage** button next to the course category you need to manage.

### 3.2.2 Managing Categories: view category

This task will allow you to view an existing read-only course category’s information.

![Image of view category](image)

### 3.2.3 Managing Categories: edit category

This task allows you to manage properties of an individual course category. These properties define what is displayed to an administrator and students.

Click on the **edit category** link located in the side menu. The fields marked with asterisk (*) are required.
(1) After you make your changes, click **update** to save your changes. If your update was successful, you will be redirected to the **view category** page for this course category.

(2) Click **cancel** if you do not wish to save changes.

**3.2.4 Managing Categories: edit course category members**

This task allows you to manage what courses belong to a course category.

Click on the **edit members** link located in the side menu. From this point, the administrator has multiple options: view the details of an existing course membership, remove a course from the category, or add a new course to the category.
(1) Click on the view button to see the course details.
(2) Click on the add course to category button to add one course from the list to the current category. If the add was successful, the list of courses for this category will be updated.
(3) Select the box to the far right of the course located in the list, then click the delete button. You can delete more than one course at the same time by selecting multiple boxes.

NOTE: This simply removes the course from the list of courses in the category.

3.3 Curricula
Curricula are used to group courses for a single assignment. Curricula also allow you to set prerequisites for courses.

(1) Use the advanced filtering features to quickly locate the desired curriculum.
(2) Click on Curriculum Name, Course Count, User Count or Active to change the ordering of the information. You can order only one column at a time.
(3) Click the manage button next to the curriculum you need to view or edit.
(4) Click the add new curriculum button to create a new curriculum.

3.3.1 Managing Curricula: view curricula

The first page that you see after clicking the manage button on the curriculum list is the view curriculum. This task will allow you to view an existing curriculum’s read-only properties.
3.3.2 Managing Curricula: edit curricula

This task allows you to manage properties of an individual curriculum. These properties define what is displayed to an administrator and students.

Click on the edit curriculum link located in the side menu and edit the existing properties.

(1) Once the curriculum properties have been edited, click the update button to save your changes. If your update was successful, you will be redirected to the ‘View Curriculum’ page for this curriculum.

(2) Click the delete button. Confirm the deletion by clicking OK or cancel the deletion by clicking Cancel button.

NOTE: A curriculum can only be deleted if it has no course members. See the next point 3.3.3 Adding members to learn more.
3.3.3 Managing Curricula: edit members

This task allows you to manage what courses belong to a curriculum. Click on the *edit members* link located in the side menu.

(1) Click the *view* button to view the details of an existing course membership.
(2) Use *move up* and *move down* buttons to organize courses into a curriculum.
(3) Select the box to the far right of the course located in the list, then click the *delete* button. You can delete more than one course at the same time by selecting multiple boxes.

**NOTE:** This simply removes the course from the list of courses in the curriculum.
(4) Click on the *add course to curriculum* button located below the list of courses and define the required properties.
(1) **Prerequisite**: (Optional) Selecting a course will define this course as a prerequisite for the course being managed.

(2) Click the *add* button to insert the course into the curriculum. If the add was successful, the list of courses for this curriculum will be updated.

### 3.4 Assessments

Assessments provide the means to assess student’s knowledge of subject matter. Administrators can manage assessment properties, questions, answers, and assignments.

A list of assessments will be displayed, with the number of questions asked, and whether or not the assessment is valid, shared and active.

![Assessment Table]

(1) Use the advanced filtering features to quickly locate the assessment. The system uses the assessment’s Assessment Name to search.

(2) Click on **Assessment Name, Question Asked, Valid, Shared** or **Active** to change the ordering of the information. You can order only by one column at a time.

(3) Total number of assessments found applying the search filter.

(4) Use the navigation tools to review the assessments list result and/or to locate a specific assessment.

#### 3.4.1 Adding Assessments

There are two ways to add an assessment:
(1) **import assessment**: click this button to automatically add a new assessment. You need to have an .xml file format. You first need to obtain this file from an existing assessment, from the **view assessment** tab. See the coming section 3.4.3 Viewing Assessments, export assessment for more details.

(2) Click the **add new assessment** button to create an assessment step by step. Provide basic information that will define the assessment. It is important to provide clear and descriptive details because this information will be visible to other users. The fields marked with asterisk (*) are required.
(1) **Question Display Order**: If **Sequential** is chosen, then the questions will be asked in a sequential order. If **Random** is selected, then the questions will be asked randomly.

**Share with Instructors**: If checked, then all instructors will be able to manage the assessment. Instructors will be able to manage assessments they have created regardless of this option.

**Active**: Determines if the assessment is active within the LMS. This setting affects a student’s ability to take the assessment.

**DEFAULT**: THE FOLLOWING SETTINGS WILL BECOME THE DEFAULT SETTINGS EVERY TIME THIS ASSESSMENT IS ASSOCIATED WITH A COURSE SESSION.

**Minimum Passing Score**: Input a number between 0 and 100. If 0, then there is no minimum passing score.

**Time Limit**: Defines how many minutes the student is allowed to complete the assessment. If 0, then there is no time limit.

**Show Review Details**: If checked, then before submitting the assessment for final scoring, the student will be able to see a summary of the assessment questions along with the answers they selected.

**Show Results Details**: If checked, then after completing the assessment and getting scored, the student will be able to see their answers along with details on which are correct and which are not correct.

(2) Once the assessment properties have been defined, click the update button to create the assessment. If the assessment was successfully created, you will be redirected to the questions page. See this task in 3.4.5 Editing Questions section.

### 3.4.2 Managing Assessments

![Assessment Management](image-url)
(1) To view or manage an assessment, click the manage button located to the far left on the desired assessment. The following tasks are available for managing assessments.

3.4.3 Managing Assessments: view assessments

This is the first view that you see after clicking the manage assessment button. This task will allow you to view an existing assessment's read-only information.

(1) Click the xml button to export the current assessment to an xml format file. You also can import this file to create a new assessment. To learn more, see 3.4.1 Adding assessments, Import an assessment.
3.4.4 Managing Assessments: edit assessments

1. Once the desired edits have been made, click the **update** button to save your changes. If your update was successful, you will be redirected to the **view assessment** page.
2. Click **cancel** if you do not wish to save changes.

3.4.5 Managing Assessments: questions

This task allows you to add, edit or delete the current assessment's questions.
NOTE: The first time you create the questions, a message will be displayed to remind you how many active questions need to be created for the assessment to be valid. The figures shows an already made set of questions.

1. Click the edit button next to the desired question to change its properties.
2. Click the delete button at the far right of the question to delete that question.
3. Click the add question to assessment button to add a new question.

NOTE: See in Questions controls and errors the particular existing controls related to adding, editing and deleting questions.

**Adding questions**

Since the questions page, click add question to assessment below the list of questions to create a question in the pop up window.
(1) This drop down sets the **Question Number**, which can vary from 1 up to the total number of questions.

(2) **Answer Display Order**: If **Sequential**, then the possible answers will be displayed in sequential order. If **Random**, then the answers will be displayed in random order.

(3) **Active** determines if this question will be asked in the assessment.

Once the question properties have been defined, click the add button. This will save the question and then let you input the possible answers. Note that at least 2 answers are required and that at least one answer must be set to be the correct one.

(1) Type an answer in the answer text box and choose whether that answer is correct or not.

(2) Click **add** to save the answer. Once you have saved an answer, another answer line will be displayed. Continue to add answers while making sure to have at least one correct answer.

(3) The question number, text, display order, and active parameter may also be changed by clicking the **edit question parameters** button:
(1) Once desired changes are made, click the **update question parameters** button.
(2) Click **cancel** if you do not wish to save changes.

When the question and answers are completed, close the pop up window by clicking on the X button in the top right corner of the window.
NOTE: If only one answer is set to be correct, then the student will see the answers with radio buttons, thus allowing only one answer.
If more than one answer is set to be correct, then the student will see the answers with check boxes, thus allowing more than one answer to be selected.

NOTE: See in Questions controls and errors the particular existing controls related to adding, editing and deleting questions.

**Editing questions:**

In the *Editing questions* page, click the *edit* button next to the question that you need to view or modify.

This page is similar to the adding question process.

![Editing questions interface](image)

(1) The question number, text, display order, and active parameter may be changed by clicking the *edit question parameters* button. See more details in the previous *adding questions* section, *edit question parameters* button.
(2) Click the *edit* button to change the desired answer properties: answer number, answer text, and correct.
   NOTE: when you change the answer number, the answer will interchange the number with the answer that had the number that you selected.
(3) Click the *delete* button to delete the desired answer.
(4) Complete the answer text and correct field, then click the *add* button. See more details in the previous adding questions section, adding answers.

NOTE: See in Questions controls and errors the particular existing controls related with adding, editing and deleting questions.
Questions controls and errors

There are some system controls when adding, editing or deleting questions and answers.

- You must create at least as many active questions as indicated in the Questions Asked assessment property.
- At least 2 answers are required
- At least one answer must be set to be the correct one

In the case you forget one of these premises a red message will be shown and the assessment and the question, if they correspond, will become Invalid. This status will be maintained until the situation is corrected.

See the following examples:

EXAMPLE 1: You must create at least as many active questions as indicated in the Questions Asked assessment property.
EXAMPLE 2: At least 2 answers are required
EXAMPLE 3: At least one answer must be set to be the correct one
3. Courses Tab

EDIT QUESTION

Assessment Name: 2103 test assessment
Questions Asked: 5

Question Number: 5
Question: Is this a new question?
Answer Display Order: Sequential
Active: Yes

edit question parameters

<table>
<thead>
<tr>
<th>#</th>
<th>Answer</th>
<th>Correct</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes, it is</td>
<td>No</td>
<td>edit delete</td>
</tr>
<tr>
<td>2</td>
<td>No, it isn't</td>
<td>No</td>
<td>edit delete</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Yes</td>
<td>add</td>
</tr>
</tbody>
</table>

* 1 active question is invalid.

Assessment Questions

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer Count</th>
<th>Valid Active</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1). What's your favorite color</td>
<td>3</td>
<td>Y Y</td>
<td>delete</td>
</tr>
<tr>
<td>2). Where were you born?</td>
<td>2</td>
<td>Y Y</td>
<td>delete</td>
</tr>
<tr>
<td>3). What type of car do you drive.</td>
<td>4</td>
<td>Y Y</td>
<td>delete</td>
</tr>
<tr>
<td>4). How many question in this assessment?</td>
<td>4</td>
<td>Y Y</td>
<td>delete</td>
</tr>
<tr>
<td>5). Is this a new question?</td>
<td>1</td>
<td>N Y</td>
<td>delete</td>
</tr>
</tbody>
</table>

Total of 5 questions found
3.5 Forums
Forums allow users to post messages for others to read, and to reply to messages posted by other users.

Forums can be one of two types: Public or Private. A Public Forum is a forum that is visible by all users. A Private Forum must be associated with a course activity session and is only visible to those students that are registered for that session and the instructors that lead that session.

3.5.1 Managing forums: view forum

Once the desired forum is located, click the manage button to access the default view forum page. This task will allow you to view an existing forum’s properties.
3.5.2 Managing forums: edit forum

This task allows you to edit properties of a forum. The fields marked with asterisk (*) are required.
(1) Click the edit button to add a new forum group or to edit an existing forum group.

(2) **Forum Type**: Choose Public or Private. If you select Private, you should give the access within the audience page. See the following item 3.5.2 Managing forums: audience.

(3) Once the desired edits have been made, click the update button to save your changes. If your update was successful, you will be redirected to the view forum page.

(4) Click the delete button if you wish to remove the listed forum.

### 3.5.3 Managing forums: audience

This task allows you to associate Private forums with specific Activity Course Sessions. To perform this task, click the audience link.

**NOTE**: This view corresponds to a Public forum type forum.
NOTE: This view corresponds to a *Private forum type* forum.

(1) Click the **add courses/sessions to forum** to associate this Private forum with specific Activity Course Sessions.

### 3.6 Surveys

Surveys are a means to get user feedback on any topic desired. Students assigned to a survey are asked questions and presented with possible answers, which are then analyzed to provide statistical results. Administrators can manage survey properties, questions, answers, and assignments.

(1) Use the advanced filtering features to quickly locate the desired survey.
(2) Click on **Survey Name**, **Questions**, **Valid** or **Active** to change the ordering of the information. You can order only one column at a time.
(3) Click the **manage** button next to the survey you need to view or edit.
(4) Click the **import survey** button to automatically add a new survey. You need to have an .xml file format. You first need to obtain this file from an existing survey, from the **view survey** tab. See the coming section 3.6.2 Viewing surveys, export survey for more details.
(5) Click the **add new survey** button to create a survey step by step. Provide basic information that will define the survey. The fields marked with asterisk (*) are required.

#### 3.6.1 Adding Surveys

Surveys are a means to get feedback from students on any topic desired. You may create a survey and assign it to any one user or group of users. Surveys are very similar to Assessments in that you create questions and answers. Nevertheless, note the following differences:
- Each Assessment answer needs to be set as correct or incorrect. However, there are no correct or incorrect Survey answers.
- A survey yields no score, but provides a report on percentages of answers selected.
- Assessments are associated with Course sessions, whereas Surveys are assigned directly to users.

(1) Once the survey properties have been defined, click the add button to create the survey. If the survey was successfully created, you will be redirected to the questions page. See this task in 3.6.4 Editing Questions section.

### 3.6.2 Viewing Surveys

This is the first view that you see after clicking the manage survey button. This task will allow you to view an existing survey’s read-only properties.
Click the **xml** button to export the current survey to an xml format file. You also can import this file to create a new assessment. To learn more, see 3.6 Surveys, Import survey button.

### 3.6.3 Editing Surveys

This task allows you to manage properties of a survey. This task will allow you to edit an existing survey’s properties.
(1) Once the desired edits have been made, click the `update` button to save your changes. If your update was successful, you will be redirected to the `view survey` page.
(2) Click `delete` if you wish to remove the listed survey.
   NOTE: A survey can only be deleted if it is not assigned to users.

3.6.4 Editing Questions

NOTE: After you create a survey, a message will be displayed to remind you that at least one (1) active question needs to be created for the survey to be valid.
(1) If a mistake is made, click the `edit` button to change the answer number, text, answer type, and active parameter.
(2) Click `delete` to remove the desired question.
(3) Click `add question to survey` below the list of questions to create a question in the pop up window.
(1) This drop down sets the **Question Number**, which can vary from 1 up to the total number of questions.

(2) **Answer Type**: If **Single Selection**, then the student will only be able to select one answer. If **Multiple Selection**, then the student will be able to select multiple answers.

(3) **Active**: Determines if this question will be asked in the survey.

Once the question properties have been defined, click the *add* button. This will save the question and then let you input the possible answers. A message will be displayed reminding you that at least 2 answers are required.
<table>
<thead>
<tr>
<th>#</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>![Add button]</td>
</tr>
</tbody>
</table>

Type an answer in the answer text box, and then click the **add** button to save that answer. Once you have saved an answer, another answer line will be displayed. Continue to add all of the possible answers.

NOTE: At this instance the question number, text, answer type, and active parameter may be changed by clicking the **edit question parameter** button.
When the question and answers are completed, close the pop up window by clicking on the X button in the top right corner of the window.

### 3.6.5 Survey assignments

This task allows you to assign a survey to one or more users.

---

**EDIT QUESTION**

<table>
<thead>
<tr>
<th>#</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Answer 1</td>
</tr>
<tr>
<td>2</td>
<td>Answer 2</td>
</tr>
</tbody>
</table>

1. Click the **edit** button to change the answer number or text.
2. Click **delete** to remove the desired answer.

---

(1) Click the *edit* button to change the answer number or text.
(2) Click *delete* to remove the desired answer.

---

When the question and answers are completed, close the pop up window by clicking on the X button in the top right corner of the window.

### 3.6.5 Survey assignments

This task allows you to assign a survey to one or more users.
(1) Click on the **add new survey assignments** button located below the list of survey assignments to view the ADD NEW SURVEY ASSIGNMENTS pop up page. Follow the steps to complete the assignments.

### 3.6.6 Survey results

This task allows you to view survey results by means of statistical analysis.

(1) Click the **printable version** button to have a better view of the report to print.

### 3.7 Elective Requests

When students submit a request to register for a course session in the elective catalog, administrators have the option to approve or deny the request. This is done by elective requests.

Select the desired course and click the **manage** button next the requestor’s name. Choose whether to
3. Courses Tab

Approve or Deny the request. You may optionally type a note in your response, which can be emailed to the requestor. When done, click the **process** button. Upon processing, the pop up will close and that student’s request will be removed from the elective requests queue.
4) ASSIGNMENTS TAB
In this section we will demonstrate how to assign training to existing users. Administrators have the ability to assign training to users and manage existing assignments. The assignment process is a multi-step process that allows you to select the assignment audience and courses to be assigned, as well as define the properties of the assignment.

NOTE:
To be eligible for training assignments, a user must be a member of the student security role. By default all users are members of the student role when they are created.

Training assignments are made to a single user or multiple users. The users receiving the assignment will be determined by the filtering options selected during the assignment process.

NOTE:
When selecting an organization node, the administrator has the option to include sub-node users in the assignment.

Administrators can manage or view existing mandatory training assignments. Managing an existing assignment allows you to delete the assignment or edit the assignment begin date, assignment end date, or reminder email dates.

The Assignments Tab allows you to perform the following tasks:

- Search for Student course and curriculum assignments
- Manage elective group assignments
- Add student and elective assignments
- Batch credit users
- List Available Licensed Courses
- Search for elective requests

4.1 Student assignment search
Click the student assignment search tab, enter the required search criteria.
4) Assignments Tab

(1) **Assignment Type**: Select **Curriculum** or **Course**.

(2) Click the **select node** button to select Organization Node

(3) Once you have completed the required search criteria, click the **search** button to list student assignments.

The student assignment search results be listed which lists the user, the assigned course and course code along with the course status.

(1) Click **modify search criteria** to return to the student assignment search.

(2) Click **manage** to view and edit the assignment.
4.1.1 Viewing training assignments

Click on the manage button located next to the assignment you would like to view. This will display the view assignment page for this assignment with the following read-only properties.

4.1.2 Editing training assignments

Editing an assignment allows you to modify the assignment begin and end date as well as the email reminder dates. The fields marked with asterisk (*) are required.
(1) Once the assignment properties have been edited, click the **update** button to save your changes. If your update was successful, you will be redirected to the **view assignment** page for this assignment.
(2) Click **cancel** if you do not wish to save changes.

4.2 Elective Group Assignments
Select the **elective group assignments** link to display the list of elective assignments. This task allows you to view and manage elective assignments.

(1) Click the **manage** button to manage elective assignments.
(2) Click **add new elective assignment** to create a new elective assignment. This task is similar to editing an elective assignment. See 4.2.1 Managing elective assignments: **edit** for more details.

4.2.1 Managing elective assignments: **view**

Click the **manage** button for the Elective Assignment you would like to view. You will be redirected to the **View Elective Assignment** page.
### 4.2.2 Managing elective assignments: edit

Select and manage the Elective Assignment you would like to Edit. Click the *edit elective assignment* link to be redirected to the *Edit Elective Assignment* page. This task allows you to edit Elective Assignments. The fields marked with asterisk (*) are required.
(1) Click **select node** to change the **Organization Node**. When selecting an organization node, the administrator has the option to include sub-node users in the assignment.

(2) After you make your changes, click **update** to save your changes. If your update was successful, you will be redirected to the **view elective assignment** page for this User.

### 4.2.3 Managing elective assignments: content

After clicking the **content** link, you will be redirected to the **Content** page in order to select desired courses and curricula.
(1) Click delete to remove the desired course.
(2) To add individual courses, click the add course to assignment button.
(3) Click delete to remove the desired curricula.
(4) To add curricula, click the add curriculum to assignment button.

4.2.4 Managing elective assignments: audience

This task allows you to set the User Groups that will be able to sign up for the elective training. Select the audience link.
4) Assignments Tab

(1) By default all User Groups can see the assignment.
(2) Click the modify user group to add or remove users to the Users Group.

<table>
<thead>
<tr>
<th>MODIFY USER GROUPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1: Select an Option</td>
</tr>
<tr>
<td>1. Don’t Restrict Assignment by User Group (Global)</td>
</tr>
<tr>
<td>2. Select Individual User Groups</td>
</tr>
</tbody>
</table>

(1) Choose this option to prevent the Assignment from being restricted by User Group.
(2) If this assignment should be narrowed down to a specific User Group, choose this option. After your selection, click the next button and follow the indications.

4.3 Add assignment

4.3.1 Assign Mandatory Training to Users

This task allows you to assign training to a single user or multiple users.

Located in the add assignments tab, select the add student assignment option and press the next button.
(1) Select the desired catalog from the dropdown list.
(2) Click on the select catalog button. The box below will show the properties of the selected catalog.
(1) Narrow your user search by adding filters and clicking the search button. In the search result list, click the select button located next to the user or users you would like to assign training.

(2) After selecting one or more students, click the next step button.

(*) Follow the instructions to complete the assignment process. You will step through the following pages:
- Courses
- Curricula
- Sessions
- Define Options
- Confirm
- Results

4.3.2 Assign Elective Training to Users

This task allows you to assign elective training to a single user or multiple users.

Located in the add assignments tab, select the add elective assignment option and press the next button.
(1) Fill out the required information for the new elective assignment and click the **add** button. After clicking the **add** button, you will be redirected to the **Content** page in order to select desired courses and curricula.
For a complete explanation of the next steps please refer to 4.2.3 Managing elective assignments: content and 4.2.4 Managing elective assignments: audience.
5) REPORTS TAB

In this section we will demonstrate how to run basic and enhanced reports on information stored in the LMS. LMS’s reporting tool presents this data as a comprehensive view of the training progress in your organization. These reports are used by key personnel to make strategic decisions concerning your organizations training, program management and audit trails.

Each report has a unique set of features, which demonstrate IMS’s comprehensive and flexible reporting features. These include report filters and definable reporting periods for date sensitive information. All reports can be exported to PDF, which allows reports to be printed, saved, and emailed in an industry standard format. Printing a report in PDF format allows the report to easily maintain formatting and proper paging. The LMS also allows reports to be exported into Microsoft Excel. This feature allows administrators to use Excel’s features to filter and perform calculations on training data.

An additional feature on all LMS reports is the option to save specific report filter criteria in a my reports section, which allows you to quickly run repetitive reports without having to redefine the filters and criteria.

5.1) Standard Reports

The Reports tab is organized in categories as follows:

- **Favorite Reports**: Provides a list of all reports marked as Favorite by the logged in user.
- **Users**: Provides user specific information. These include user lists with related LMS information and contact information. They also provide enrollment requests activity and management information.
- **Courses**: Provides course specific information for courses. This information includes course lists, rosters, course schedules, and SCORM information.
- **Assignments**: Provides user training assignment details. These assignment reports are generated from either a user’s or course perspective. These details include course, assignment type, assignment dates and status.
- **Activity**: Provides user training activities for assignments and electives. Activity reports are generated from a user, course, or curriculum perspective. The details include course, last activity date, state and completion date. Scores are included if applicable.
- **Completion**: Provides user completion information for assignments and electives. This information includes course, assignment type, completion date and scores if applicable. Additional reports included are summary reports with completion totals. Completion reports are generated from the course, user or curriculum perspective.
Each of these report categories has the same behavior:

1. A list of Standard Reports that you can select from.
2. A build button to run the desired report.

5.1.1 Building Reports

To explain how to build and run a report, we will use the Users by User Group report shown in the previous figure.

To build a report, click the build button next to the report you wish to run. A list of definable report criteria will be displayed for this report.
(1) Enter the desired report criteria, if needed, and click the *run report* button. The report results will be displayed.

(1) The report criteria can be saved and re-used. To save the report criteria, enter a name describing the saved filter criteria in the *Save criteria to My Reports* textbox and click the save button located to the right of the textbox. The Save Report criteria is found under the My Reports link in the Reports Tab.

(2) Use the *export to pdf* button to create a copy of the report that can be saved, emailed or printed. Printing a report from PDF will preserve the format of the report.

(3) Use the *export to excel* button to export the report results to Microsoft Excel. This will allow you to use Excel features to filter and sort results.

### 5.1.2 Favorite Reports

Use this task to manage your most common used reports.
5) Reports Tab

(1) Click the **build** button to run the desired report.
(2) Click **delete** to remove the desired report.
   NOTE: this action will remove the report from the Favorite page only. You will be able to find it listed in the corresponding report page.
(3) Click **add report to favorites** to add a Standard Report to the Favorite Reports list. The ADD REPORT TO FAVORITE REPORTS pop up will be shown.

5.2) Managing my reports

The **my reports** feature allows specific report filter criteria to be saved and run as needed. This allows repetitive reports to be built without having to redefine the criteria. The lists of saved reports are organized by the main report categories: Users, Courses, Assignments, Activity and Completion.

Reports can be added to a list by building the desired report and using the **save** button on the results.
page. As a part of this feature, you will have the option to view the saved reports or remove them from the lists.

NOTE: Using the save button on the results page will save the report criteria into my reports but it will not save the current report results. The intention is to allow you to define report criteria that can be quickly reused as often as necessary.

All my reports functions, have the same behavior as Standard Reports: Click a report category in the side menu to display a list of saved reports.

(1) Click the view button next to the report you wish to run. The report results will be displayed.
(2) Click the delete button to remove saved report criteria from the list

5.3 Building an ad hoc report
This option allows you to create your own report, by applying other filtering criteria. You can save this report by using the save button as instructed in 5.1.1 Building reports save button. The report will be located under reports, in the ad hoc category.
Complete the search criteria for your report and click the search button to see the resulting page.
6) ORGANIZATION TAB
In the LMS, administrators may organize users into three (3) structures:

- Organization Tree
- Security Roles
- Group Types

These structures are managed within the **Organization Tab**.

6.1 Organization Tree
The Organization Tree helps manage and report user activity and can be customized to reflect any organization structure. The hierarchy is based on a “parent/child” model that becomes important in training management, application security, and reporting.

Think of this hierarchical tree as a graphical representation of your organizational structure. For example, nodes of the tree can be arranged to represent departmental, geographical or political boundaries. Since each user can belong to one of the nodes within the tree, you can do such activities as assign a course to all users in one department, or view all training records of users at a specific office location. This is a tremendous timesaving feature, as you needn’t select users one by one.

Furthermore, the organization tree can limit an administrator’s access to information. For example, an administrator will not have permission (or access) to view or manage users in a sibling node, but only in the assigned node and all its child nodes.

6.1.1 View organization
Clicking the **Organization** tab will display the organization tree by default.
6.1.2 Edit node

To edit the Organization Tree Nodes, click on the edit node link in the side menu.

The selected node to edit will be pointed out by a highlighted box. You may expand nodes to see children nodes by clicking on the plus symbol to the left of the node. You may select another node to edit by clicking on it and ensuring the highlighted box points to the desired one. Once the desired node is selected, you may edit that node’s properties.
(1) You may move the selected node by choosing its parent in the **Parent Node** drop down.

(2) Use the **Browse** button to locate the desired image, then click the **upload** button.

(3) Once the desired changes are made, click the **update** button to save your changes.

### 6.1.3 Add node

To add a new node to the Organization Tree, click on the **add node** link in the side menu.

The selected parent node of the new node will be pointed out by a highlighted box. You may expand nodes to see children nodes by clicking on the plus symbol to the left of the node. You may select another parent node by clicking on it and ensuring the highlighted box points to the desired one.
(1) Once the desired parent node is selected, you may type in the new node’s name in the **Organization Node** text box.

(2) Click the **add** button to save the new node. The new node will be added to the Organization Tree, under the selected parent node.

If you wish add more properties to the node added, click the edit link in the side menu.

### 6.2 Security roles

The LMS has three (3) main Roles that determine a user’s access to functions within the LMS. These roles are **Administrator**, **Instructor**, and **Student**. Any user may have one or more roles. Administrators can have access to all functions, while Instructors are limited to managing courses they teach. Students are only able to access Courses they are assigned to take. Other than those three (3) main roles, you may assign access to specific Administrator functions. These Custom Administrators are
users that have a customizable subset of the Administrator role.

To view these Security Roles, select the **security roles** link located in the **Organization** tab.

Managing Security Roles involves viewing the users which have the selected role and/or removing or adding users to the selected role.

To manage a specific Security Role, click on the **manage** button next to the desired role. The list of users with that role will be displayed.
(1) Clicking the **manage** button next to a user will redirect you to the Security Role page for that user profile. View section 2.1.4) Managing Users: User security roles details on that page.

(2) You may remove a user from the role by clicking the **delete** button. Note that this does not delete the user.

(3) Clicking the **add users to security role** button will display a searchable list of users that can be individually added to the selected Security Role by clicking the add button.

### 6.3 Group types

Two other very powerful and customizable concepts—distinct from the “Organization Tree” concept—are called **Group Types** and **User Groups**. A **Group Type** is simply the name defining the types of User Groups that it contains. You may have as many Group Types as needed and as many User Groups within those Group Types. This allows administrators to define User Groups that represent their organization.

For example, administrators can create User Groups that define job titles, locale, or any other category appropriate for your organization.

There is a default Group Type called **Job Category**. You may add User Groups to this Group Type to reflect job categories within your organization.
To go through the following tasks, you may first select the desired group type from the drop down list.

(1) Select edit or add new group type to manage the type group names.
(2) Locate the desired user group in the list and click on the manage button. Administrators can manage or view user groups. Existing user groups may be edited and users may also be assigned to one of more existing user groups.
(3) Click on the add user group to group type to add a new user group to the selected group type.

6.3.1 Managing user groups: view user group

This task will allow you to view an existing user group’s properties.

Locate the desired user group in the list of a group type and click on the manage button.

6.3.2 Managing user groups: edit user group

You can update your user group with new information. Edit the necessary user group name and description.
(1) Once the profile properties have been edited, click the **update** button to save your changes. If your update was successful, you will be redirected to the **view user group** page.

### 6.3.2 Managing user groups: edit members

This task allows you to manage what members belong to a user group.

To perform this task, locate and manage the group type in the LMS. Click on the **edit members** link located in the side menu.

(1) Click on the **view** button next to a member located in list of members to see details of a user group member.

(2) To add a new user to the group, click on the **add users to user group** button located below the list of members. The **ADD USERS TO USER GROUP** pop-up will be displayed. Once the desired user is located, click the **add** button to insert the user into the user group.

(3) To remove members from the group, use the select all checkbox located on the top of the grid or select members one by one. After completing your selection, click the **delete** button. This simply removes the member from the list of members in the user group.

**NOTE:** Performing this step does not delete the user from the LMS.
6) Organization Tab