OnPoint Course Manager:

Section 1
Users & Groups

ONPOINT

December 2017

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1.0 Users & Groups

The first top level menu choice button in the Course Manager's drop down menu system is Users & Groups. When clicked once, this primary level menu option opens to reveal several submenu options that provide direct access to all user- and group-related information and files stored in the shared Course Manager repository. Each related submenu option selected from the Users & Groups Menu will display a table listing of records from the OnPoint database specific to the item selected. The Users & Groups Menu has a number of submenu selections.

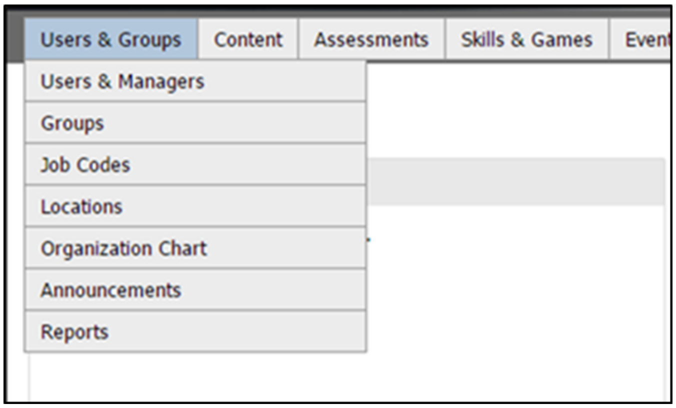


Figure 1-1 – Users & Groups: Submenu Selections

Users & Groups sub menu selections

- **Users & Managers** - The Users & Managers selection provides a list of all licensed Users & Managers defined and managed in the shared repository. Users & Managers are listed in alphabetical order by last name, and the list includes their unique User Login, their business title or role, as well as other personal and organizational details. Specific user and manager details are accessible and editable by clicking on the User Name link.
- **Groups** - The Groups selection provides a list of all defined groups in the shared repository. Groups are displayed in alphabetical order, along with a Group Description, that group's supervisor and status of the group. Specific Group details are accessible by clicking on the Group Name link.
- **Job Codes** - The Job Codes selection provides a list of all defined Job Codes in the shared repository. Job Codes are displayed in alphabetical order, along with a Job Code Description, and the status of that group. Specific Job Code details are accessible by clicking on the Job Code Name link.
- **Locations -** The Locations selection provides a tree view of all defined locations in the shared repository. Locations are displayed in alphabetical order, in accordance with their position within the tree. Specific location details are accessible by expanding the tree and clicking on the Location Name.
- **Organization Chart -** The Organization Chart provides a tree view of the defined hierarchy within the organization. Details are accessible by expanding the tree and clicking on the desired job title.
- **Announcements -** The Announcements selection displays a list of announcements stored in the database. Announcements are displayed in alphabetical order, and are listed by the group with which they are associated. The table shows the Display Start Date and Time, Display End Date and Time, Job Code, the Author of the announcement, and if the announcement is urgent or not.
- **Reports** - The Reports selection provides a number of preformatted reports used by administrators to report on User/Group data.

1.1 Users & Groups: Users & Managers

The first drop down option under the **Users & Groups** Menu is **Users & Managers**. This selection displays the **Users & Groups: Users** list, a database listing of all current licensed Users & Managers being managed in Course Manager. From this list, you may:

1. Select a User, Manager, or Record from the list to review.
2. Click on the record to display the details, or edit by clicking on the edit option.
3. Click on a letter of the alphabet shown to filter the list by last name
4. Click on the Role check boxes to filter the list by role (Users, Managers, Records or Instructors)
5. Click the **Add User** button to create a new user
6. Use the **Filter** button to narrow your search for a specific User, Manager or Record. You can also narrow it as Active, Inactive, and Request Delete.
7. Use the **Bio Filter** button to narrow your search for specific bio options such as languages, education, or other specific categories.
8. Click the clear filter icon to clear out the filters selected

	Note: The first displayed list has a default filter that is set to the letter "**A**". This ensures that Administrators with sites managing hundreds or thousands of Users/Learners/Records need not wait for the list to sort and display all defined names when selected. The list shown in Figure 2-2 below is filtered on the letter "**A**" and the default role of Users.

	Tip: Only Root and Site Administrators have the ability to access the Role filter. Other lower-level managers cannot affect change to other managers of the same level.

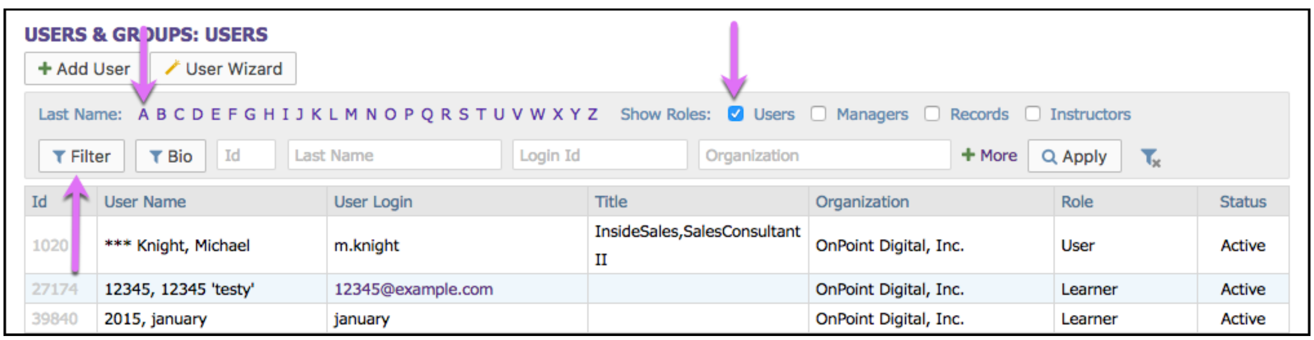


Figure 1-2 – Users & Groups: Users Table Display

Users are listed alphabetically by Last Name. The User list displays the following information:

Users & Groups: User List	
Element	**Description**
Id:	Unique record identifier for the displayed User or Manager. **Tip:** These are generated sequentially so higher numbered records are always associated with newer records. Id numbers are auto-generated by the system and are never reused.
User Name:	Assigned name of the User/Learner/Record/Manager/etc. Click the User Name to view more details about the user, or to edit the record. **Tip:** For tracking and management purposes, it is important that every person in an organization have a unique User Account assigned to them rather than using shared

Users & Groups: User List	
Element	**Description**
	login IDs for a group of people. Unique login credentials make both organizational and individual-level reporting possible.
User Login:	User/Learner's assigned email address or primary Login Id. **Tip:** All users don't need to have an email address defined for them and in some environments this may not apply. If your organization uses some form of unique login Id and also has email addresses for users, you may choose to use the login identifier here and additionally record the user's email address in the email field within the user's record.
Title:	User/Learner organizational title.
Organization:	Organization with which the User/Learner is associated.
Role:	Designates whether the named person from the User list is managed as a User, Learner, or a Record. The default setting is "All". When using the Manager or Both role filters, this column also designates whether the named person from the Manager list manages as a Root Administrator, Site Administrator, Course Coordinator, Content Administrator, Event Manager, Group Manager, Reporting Manager or Document Manager. **Tip:** To see a list of Records, use the **Filter** button and under the User Role field, select Record or select the role filter checkbox if you are a Root or Site Administrator.
Status:	Designates the Status of the specified user. Users can be Active, Inactive, or Marked for Deletion. The User list is automatically set to filter this list by those with a status of "Active". This filter can be changed using the **Filter** button.

Other User: List - Related Information:

Some additional features can be found at the bottom of the User list:

- **User Count** - At the bottom left of the Users: List table is an active count of all the current users managed in the database (as filtered).
- **Results Page Listing** - User & Manager Lists with more than 50 records are separated over multiple pages. These pages can be navigated using the Results Page Listing at the bottom left of the User: List screen. Pages can be accessed by the numbered pages, or navigated using the arrow buttons.
- **Color Keys** - Users listed in the User: List table are considered "Active" but may be flagged as "Request Delete" or "Inactive" by an administrator. When any defined users have been flagged as "Request Delete" or "Inactive", a legend (or reminder key) appears at the lower left of the Users: List table indicating at least one user has been marked as "Request Delete" (the record will be highlighted in **Pink**) or "Inactive"(the record will be highlighted in **Yellow**). This will only show if the users that are of Inactive or Request Delete status are in the filtered list. The list defaults to only showing active users, so initially no color keys will be present at the bottom of the User: List table.

Figure 1-3 – Users & Groups: Users Table Legend

This detail applies to all table listings within the Users & Groups primary drop-down menu.

1.1.1 Users & Managers: View a User Record

The User record display provides a detailed description of the personal and organizational information for every licensed user and manager defined in the Course Manager database. To view a User or Manager record, select the User you wish to view from the **Users & Groups: Users** list by clicking on the User and the **Users & Groups: User** record for that User will appear.

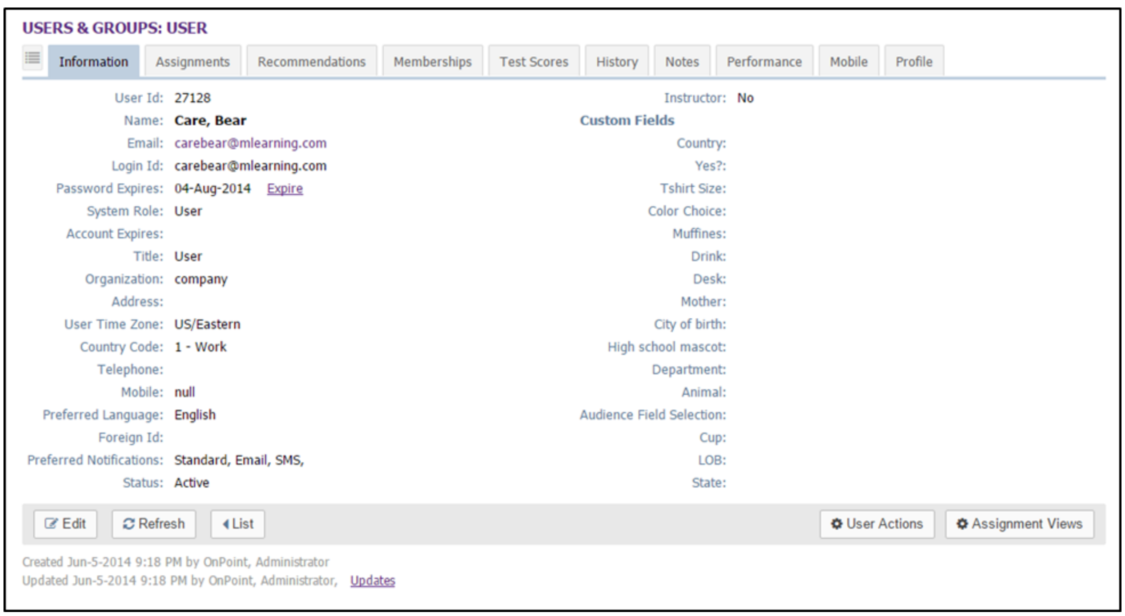


Figure 1-4 – Users & Groups: User Information

The User record has a number of submenu tabs covering all of the definitions and parameters for the selected User, as follows:

A. **Information** - Tab 1 "Information" includes fields for user Id, name, email address, title, business address, contact information, user status, etc., plus any defined custom fields to the right.

B. **Assignments** - Tab 2 "Assignments" lists all of the current Assignments for that user, including all of their Courses, Assessment Sets, Nuggets, Activities, Events, and Skill Profile/Curriculum assignments. These assignment fields may be manually updated at any time by clicking the **Assign** link. An **Archive** link is also presented that, when clicked, will transfer previously completed assignments to a User's history which can be viewed via the History sub-tab defined below.

C. **Recommendations-** Tab 3 "Recommendations" lists all of the current Recommendations for that user, including all of their Courses, Assessment Sets, Nuggets, Activities, Events, and Skill Profile/Curriculum assignments. These recommendation fields may be manually updated at any time by clicking the **Recommend** link, and removed when desired. Recommended items will show who made the recommendation, the date it was made, and also allow reinforcement.

D. **Memberships** - Tab 4 "Memberships" lists all of the current membership associations for that user, including all of their Group Memberships, Job Code Assignments, Location Assignments, Event Location Preference, Organization Chart Assignment, and Shared Mobile Devices.

E. **Test Scores** - Tab 5 "Test Scores" displays all of the Course Test Scores, Assessment Set Test Scores, Nugget Test Scores, SCORM Course Scores and User Survey Results for the selected user. This summary gives the Id, Date, Attempt, Score, Status and Assessment. The **View** link displays a record of the assessment including questions, answers provided, and graded score if applicable.

F. **History** - Tab 6 "History" displays all of the completed and archived assignments associated with the selected user. An **Unarchive** link is available that allows any assignments previously archived to be moved back into a user's assignments sub-tab. This tab also displays a comprehensive history of this particular user's module access. Clicking the **Show Module Access History** link will open a pop up window with a record of access by this user to any and all applications and the date and time of each access.

G. **Notes** - Tab 7 "Notes" allows managers to add **Notes** to a user's record about the user or for other managers to see regarding the user. These notes are not visible to the user.

H. **Performance** - Tab 8 "Performance" appears if the optional Performance Evaluation Module has been purchased. This feature set allows evaluations to be selected and assigned to the user that will be routed based on a defined Organizational Chart.

I. **Mobile** - Tab 9 "Mobile" displays more detailed mobile information for this user such as device information, , etc. This information is necessary for SMS messaging and CellCast nugget delivery.

J. **Profile-** Tab 10 "Profile" shows any user specific bio information that has been collected from the user in the My Bio area of the my profile link in the portal. An administration configuration setting can be made that allows admins to edit user bio data.

Action buttons at the lower left allow you to Edit, Refresh or Return to the List of users. Action buttons to the lower right allow you to set Login Action and Reset User History with the **User Actions** button. The **Assignment Views** button allows you to view Assignment Status for the user, view their Competency Matrix, User Certificates, External Certifications, or Access History.

1.1.2 Users & Managers: Search for a User

Under **Users & Groups: Users** is a list of all current Users and Managers in your Course Manager repository. Users and Managers are listed alphabetically by Last Name. To find a specific user, you may:

1. Scroll through the list until you locate the user record
2. Select the letter of the Last Name to narrow your search
3. Use the **Filter** or **Bio** button to narrow your search for a specific user

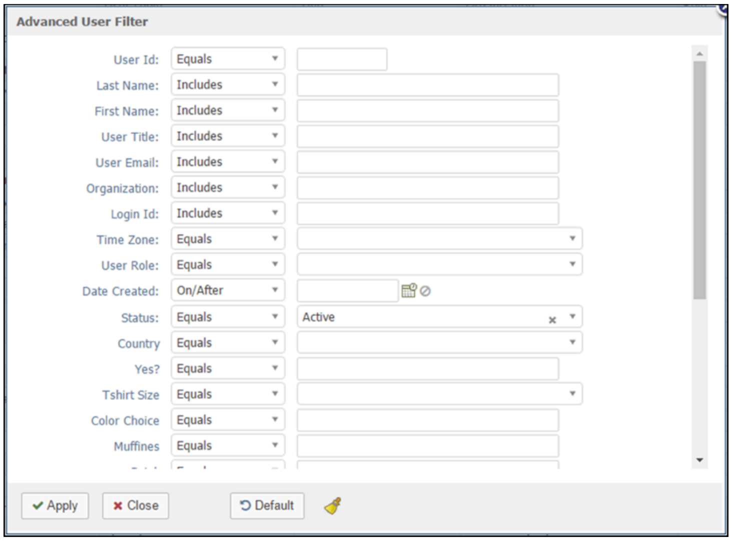


Figure 1-5 – Users & Groups: User Filter Selection Screen

The Advanced User Filter will allow you to search for a user by any of the following search criteria that is listed below.

Users & Groups: User Filter	
Element	**Description**
	Use the drop down menu for additional filter options: ● **equals** – filters for a match of a letter or text string**.** ● **begins with** – filters for all users beginning with the criteria ● **includes** – filters for all users that include the criteria ● **ends with** – filters for all users ending with the criteria. ● **not equal to** – filters out everything matching this entry ● **less than** – filters all matches less than the criteria. ● **greater than** – filters all matches greater than the criteria
User Id:	Allows for a quick search of the User Id field.
Last Name:	Search by the last name of the user.
First Name:	Search by the first name of the user.
User Title:	Search by the title of the user. Use the drop down menu and enter some descriptive data.
User Email:	Search by the email of the user.
Organization:	Search by the name of the organization for which the user is associated. Use the drop down menu and enter some descriptive data.
Login Id:	Search by the Login Id. Use the drop down menu and enter some descriptive data.
Time Zone:	Search by the user's Time Zone. Use the drop down menu to choose a time zone option.
User Role:	Search by the user's role (User, Learner, or Record), or by the Manager's role. Use the drop down menu to choose a role. The roles available to search depends upon the level of the administrator that is logged in.

Date Created:	Search for all users created on/after or before XX date.
Status:	Search by the user's status (Active, Inactive, or Delete requested).
* Additional Fields can include Bio Filters (if used) and any other custom fields (Client specific).	

Note: The most common search is by Last Name, begins with. Using the Filter also makes it easy to get a list of users by Organization in the event you have customers or partners that are users in your learning system.

When you are finished entering your selection criteria, click any of the following:

✔ Apply	To save changes and start the Search.
✖ Close	To close the Filter window and return to the User list without making any changes.
Default	To reset the criteria to the default options (All Active Courses).
	To clear all criteria (even default settings) so that you can start again.

1.1.3 Users & Managers: Create a New User (Manual Process)

There are several different ways to create new User accounts in Course Manager. The method an Administrator selects depends on the "usage scenario" they require at a given time. New users can be added in the following ways:

1. **Primary Method -** Create a new user by clicking the **Add** button accessible from the **Users & Groups: Users** screen. This method is ideal for adding one or a few new users on an ad hoc basis.

2. **Optional Method A -** Define a large group of users in a spreadsheet template and import these users in mass using the Import Users utility (accessible via the Administration: Import/Export sub menu).

3. **Optional Method B -** Allow new users to auto-register themselves via the web or a walkup workstation using the OnPoint E-Commerce ("OPEC") application (an optional purchase; See OnPoint E-commerce Administration Guide for more information).

4. **Optional Method C -** OPREG. Users can be directed to a webpage that will allow for self registration. They will be asked to fill in a specific form and submit. Once submitted it will create this user in the table.

5. **Optional Method D -** Custom integration services are available to add users to the system via custom applets that tie to other directory services (LDAP, Active Directory, Payroll/HRIS systems, etc.) so that user status can be updated automatically (new, inactive, terminated, etc.).

To create a new User record manually via the primary method described above, select **Users & Groups: Users,** then select the **Add User** button.

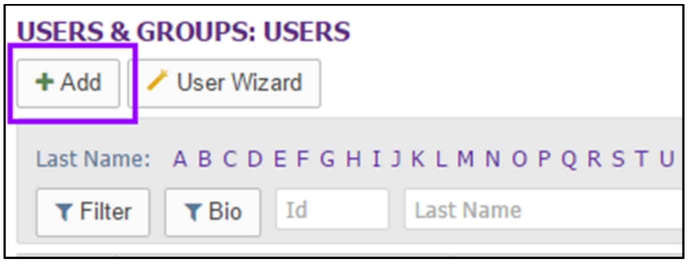


Figure 1-6A – Users & Groups: New User Record-Add

Complete all of the data fields described below the screen example as required in your environment.

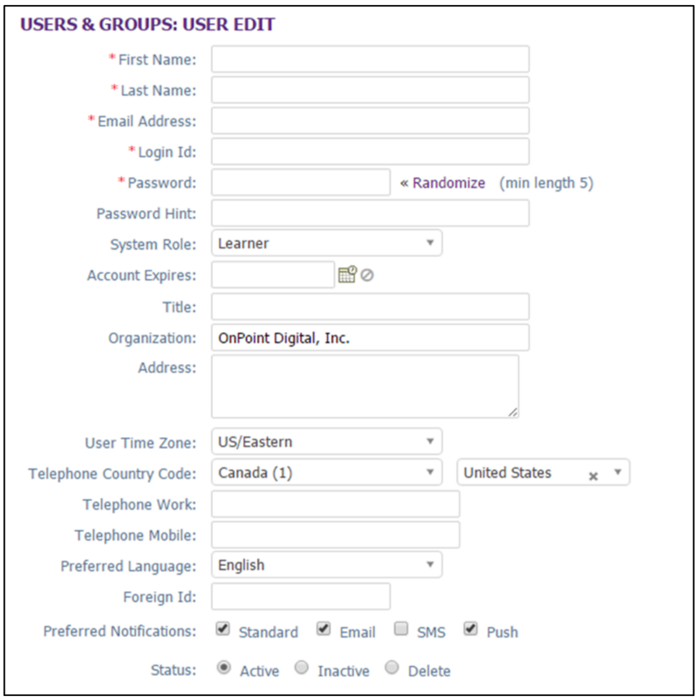


Figure 1-6B – Users & Groups: New User Record

Complete the following data fields described below:

Users & Groups: New User Record	
Element	**Description**
First Name:	Enter the User's first name **(Required Field)**.
Last Name:	Enter the User's last name **(Required Field)**.
Email Address:	Enter the User's email address.
Login Id:	Enter the User's login name/Id **(Required Field)**.
Password:	Enter the User's initial Password **(Required Field)**. The actual password will be hidden from view once this has been entered the first time. You may click the link next to the box "Randomize" to create a random password.

Password Hint:	A word or phrase that will be used as the password reminder. **Note:** The hint is automatically emailed to the User's documented Email account whenever they click the "Password hint" link on their login screen. A User can edit their Password Hint via the My Profile link in the Portal.
Title:	The User's Title within the organization.
System Role:	The assigned level of the User or Manager **Note:** Whereas "Learners" must progress through a Course sequentially (view Page 1 followed by Page 2), a "User" may jump around within a Course as they desire and review pages in any order they choose. Record-level users have no access to the system and are included for record keeping and reporting purposes only. The level of Manager displayed and able to be added depends on the level of the administrator that is logged in.
Account Expires:	A date can be specified for the user's account to expire or be inactive.
Organization:	The name of the Organization the user is associated with. It's important to complete this field when multiple organizations share the same Learning Center (e.g., partners, customers, contractors).
Address:	The primary business address of the user.
User Time Zone:	Indicates the Time Zone user is in. Select the Time Zone from the drop down. **Note:** This field can be updated by the user via the My Profile link in the Portal, in the event they are traveling outside their default time zone.
Telephone Country Code:	Select the Country Code for the user's telephone number(s).
Telephone Work:	The user's current work telephone number.
Telephone Mobile:	The user's current (mobile, smart phone, etc.) telephone number.
Preferred Language:	Indicates the language table the user prefers. This designation will drive the Portal and Content Viewer applications to display in the language entered. This can be tied to the User's browser as well.
Foreign Id:	Optional Id used to tie a user to another system of record.
Preferred Notifications:	Indicates whether notifications should be sent out to the user in a method in addition to that used in normal Notifications to the Portal. If the User desires this, you may specify in what format those notifications should be transmitted: as Email, SMS messages, and/or Push Notifications.
Status:	Indicates the Status of the user. The default is Active. • **Active** (User is currently active) • **Inactive** (User is not currently active) **Request Delete** (User account no longer needed)
Custom Fields: (Up to 20)	There may be up to additional fields with customized captions that have been defined by the Site Administrator for your organization. These fields can be used for reporting purposes. Custom fields are defined under the Administration drop down. Enter in any applicable data.

At any time you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

After creating a new user record and saving your entries, click the **Refresh** button to make sure all your changes are made and displayed.

	Note: All user information fields can be edited at any time with additional or updated information. Click the **Edit** button to update the User information fields of a User record.

1.1.3.1 Users New User: User Information

Once an Administrator has created and saved a new User record, the **Users & Groups: User** screen will display, including a number of sub-tabs that define the User (as previously summarized in Section 2.1.1). The default view is the User Information tab.

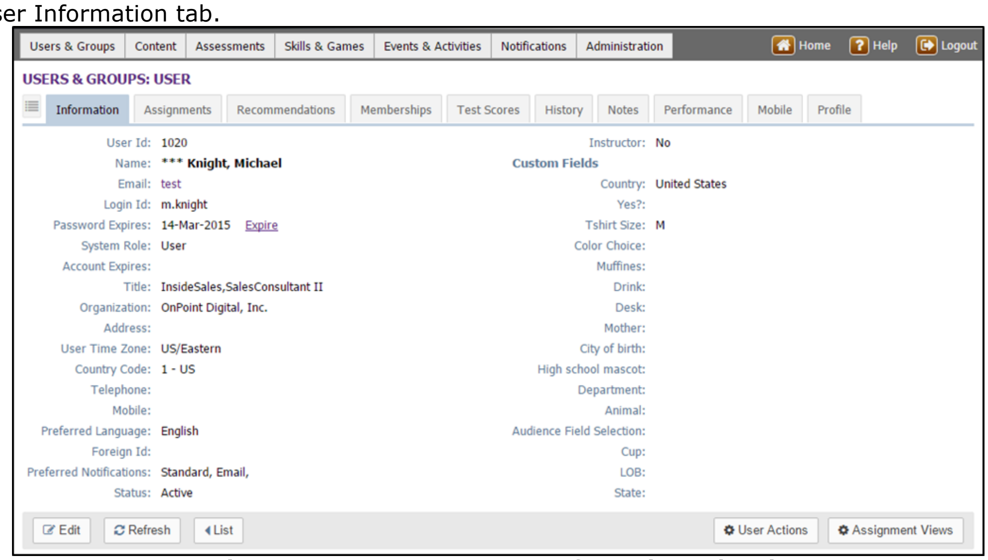


Figure 1-7 – Users & Groups: Information Sub-Tab

A set of Action Buttons appear across the bottom left of the page, including:

Edit	Allows you to view and edit the data fields for the selected record.
Refresh	Refreshes the web page with all recent updates (if needed).
List	Returns you to the list of users.

Additional Action buttons appearing across the bottom right of the screen include:

User Actions	**Login Action**: **Reset User History**: Allows an Administrator to "zero out" a user's previous test scores and reset their Course progress status to "Not Attempted." Click the **Reset History** button to initiate and complete the reset process.
Assignment Views	**Assignment Status**: Allows an Administrator to gain a quick view of the User's Assignment Status to date. The view displays all assignments including Curriculums, Skill Profiles, Courses, Assessment Sets, Nuggets, Activities, Events, and Legacy Data as well as their status and relevant scores. [This table will be

	empty for a newly created user.] **Competency Matrix**: Allows an Administrator to view the user's Competency Matrix, showing the progress of all assignments, organized by any Skill Profiles to which the user may have been assigned. **Note**: This Competency Matrix is the same matrix that the user can see under the My Status tab in the Portal. **User Certificates:** This is a single location for an Admin to see standard and dynamic certificates earned by the user. **Access History:** This provides a log of users accessing the system based on the module accessed. (Mobile, OPPortal, OPPM, OPCM, OPDoc, OPUX) **Trigger Execution Log:** This provides Admin view into triggers created for user, primarily used for troubleshooting.

1.1.3.2 Users New User: Assignments

Once a new User record has been created and defined, Administrators may want to add assignments to the User manually. Assignments can include Courses, Assessment Sets, Nuggets, Activities, Events, or Skill Profiles. Since the newly created user has just been defined, no assignments will be displayed to start with.

Tip: If your organization has the OnPoint LMS integrated with an internal HRIS or other system that regularly feeds user import detail, it is likely that those imports will automatically drive user assignments. It may be that you will not need to make manual assignments to users here under this sub-tab. Assignments can also be made at the Group level or via Skill Profiles, which also automatically applies all associated assignments. For example, if a New Hire Orientation Skill Profile is created with 10 courses in it, and that Skill Profile is assigned to a Group called New Hire Sales Staff – January 2016, then all members of that group will be automatically assigned all ten courses in the Skill Profile. No manual assignments would need to be made here at the User level.

If you would like to make assignments at the User level, click the "Assignments" Tab 2.

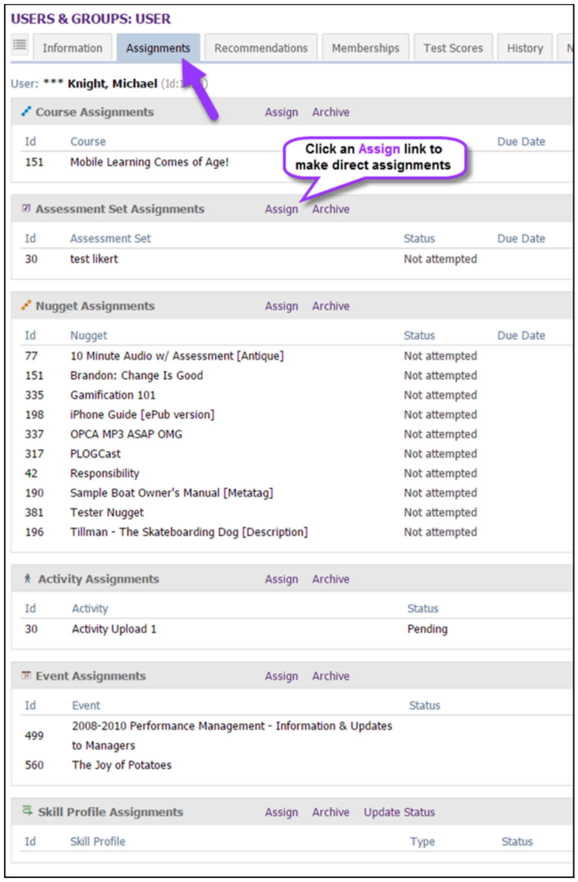


Figure 1-8-Users & Groups: Assignments

This screen displays the assignments for the User, including:

Users & Groups: Assignments Sub-Tab page	
Element	**Description**
Course Assignments:	Indicates which Courses the user is currently assigned to take, along with the Completion Status of each, the Due Date, Recertify, Last Completion, and Next Recertify. Click the **Assign** link to add new Course assignments. Click **Archive** to remove completed Courses.
Assessment Set Assignments:	Indicates which standalone Assessments the user is currently assigned to take, along with the Completion Status of each, the Due Date, Recertify, Last Completion, and Next Recertify. Click the **Assign** link to add new Assessment Set assignments. Click **Archive** to remove completed Assessment Sets.
Nugget Assignments:	Indicates which Nuggets the user is currently assigned to take, along with the Completion Status of each, the Due Date, Recertify, Last Completion, and Next Recertify. Click the **Assign** link to add new Nugget assignments. Click **Archive** to remove completed Nuggets.
Activity Assignments:	Indicates which Activities the user is currently assigned to complete, along with the CompletionStatus of each. Click the **Assign** link to add new Activity assignments.

	Click **Archive** to remove completed Activities.
Event Assignments:	Indicates the Events in which the user is currently assigned to participate, along with the Approval Status. Click the **Assign** link to add new Event assignments. Click **Archive** to remove completed Events.
Skill Profile Assignments:	Indicates which Skill Profiles the user is currently assigned to, along with details including Type, Status, Completed, and Assigned. Click the **Assign** link to add new Skill Profile assignments. Click **Archive** to remove completed Skill Profiles.

All user assignment fields can be updated at any time with new or updated assignments. No **Edit** button is required to update the assignment of a User record. The following table provides detailed instructions on making assignments for each of the system object types available.

Users & Groups: Assign Links	
Element	**Description**
Course Assignments Assign Link:	When you click an **Assign** link, a listing of all **available** Assignments will display in the column on the right and a list of all **assigned** items will display on the left. Course assignments are selected by clicking the checkbox next to the desired course(s) from the right-hand column (it is possible to assign more than one Course at a time). For environments with multitudes of available Courses, a **Filter** button is available that can help you narrow the available list. Click the **Assign** button to commit the assignments. Click the **Finished** button at the top left to return to the Assignments sub-tab screen. To Unassign an Assignment, simply select the checkbox next to the desired course(s) from the left-hand column and then click the **Unassign** button to commit.

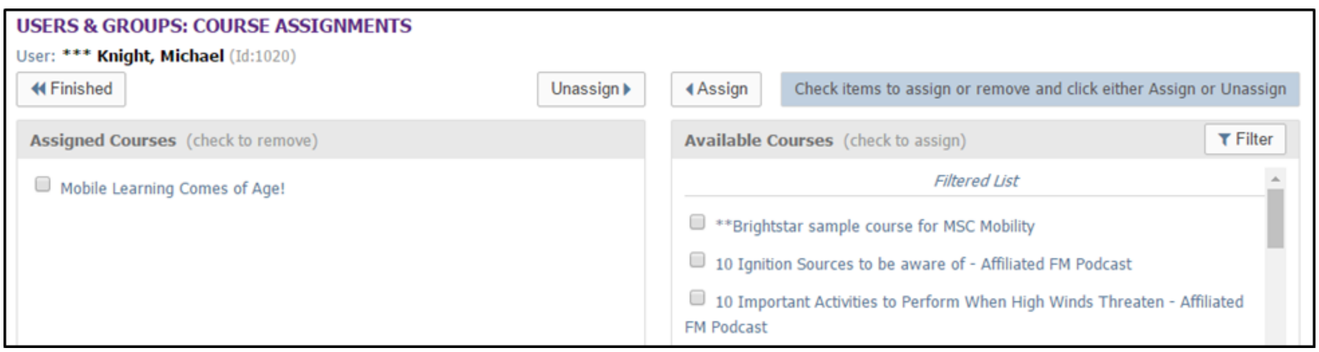


Figure 1-9 – Users & Groups: Course Assignments Screen

Users & Groups: Assign Links	
Element	**Description**
Assessment Set Assignments Assign Link:	These work similarly to Course Assignments described above.
Nugget Assignments Assign Link:	These work similarly to Course Assignments described above.

Activity Assignments Assign Link:	These work similarly to Course Assignments described above. **Tip:** Once an Activity is selected, it will be immediately assigned to the user, so be sure of your selection before you make it.

Users & Groups: Assign Links	
Element	**Description**
Event Assignments Assign Link:	These work similarly to Course Assignments described above. The available list of Events defaults to current date forward. **Tip:** An additional Filter button allows you to **Show Past Events**. This is useful if you need to add an event assignment to a user's record in order to enter a status, but the session occurred in the past. This is often the case when entering user history from a previous system or time period.
Skill Profile Assignments Assign Link:	These work similarly to Course Assignments described above. **Tip:** Once a Skill Profile is selected, it will be immediately assigned to the user, so be sure of your selection before you make it. It is especially important to be cautious here, because the assignment of a Skill Profile typically carries with it the auto assignment of numerous courses, events, etc.

Refer to Section 1.1.5 for additional detail on editing user assignments.

1.1.3.4 Users New User: Memberships

Once the assignments for the new User have been defined, Administrators may choose to add one or more Membership assignments. Users can be members of one or more defined Groups, can have one or multiple Job Codes, can belong to a Location, have an Event Location Preference, may have a position on the Organizational Chart, can have a Mentor, and Shared Mobile Devices**.** Remember that a newly created User record (created manually, versus import from an HRIS system) will not have any defined Memberships to start with.

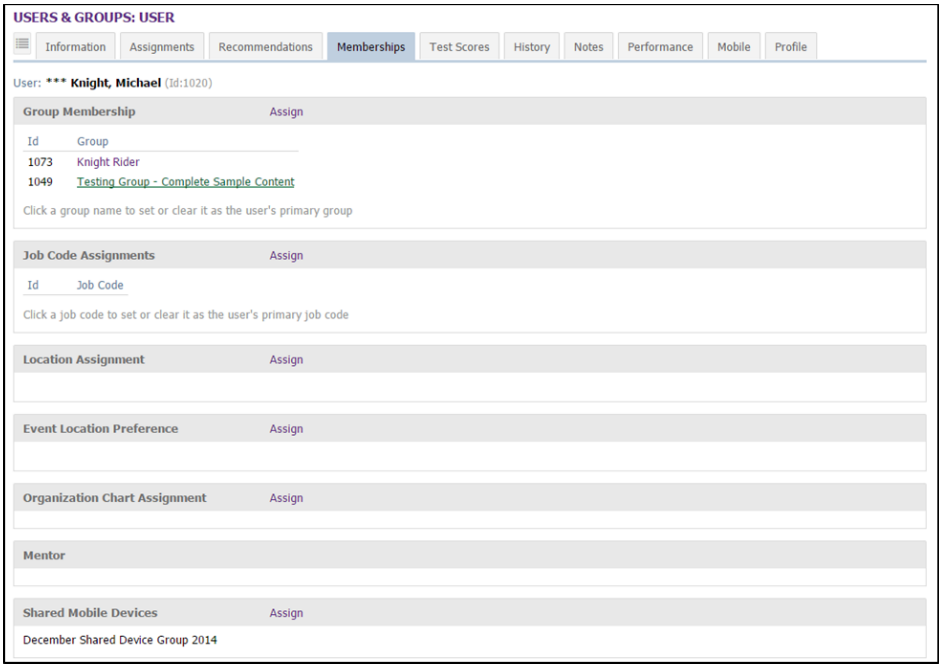


Figure 1-10 – Users & Groups: Memberships Sub-Tab

This screen displays the memberships assigned for the User based on the headings below:

Users & Groups: Memberships Sub-Tab	
Element	**Description**
Group Membership:	Indicates all the Groups for which the selected user is a member as well as denotes the Primary Group under which the user directly reports. Normally users are members of multiple groups. The Primary Group designation drives which portal layout the user will see upon login. Click the **Assign** link to add the user to a Group. Click the checkbox next to the desired group(s), click the **Assign** button to make the assignment, and click **Finished** to return to the Memberships sub-tab screen. To unassign a user from a group, click the **Assign** link next to Group Membership. Click the checkbox next to the desired group(s), click the **Unassign** button to remove the user from the group, and click **Finished** to return to the Memberships sub-tab screen.
Job Code Assignments:	Displays the Job Code(s) this user has been assigned. Normally a user will have just one job code that represents the main role he/she fulfills within the organization.
Location Assignment:	Displays the Location that represents the primary physical location the user works in. The Location is selected using the folder tree view. Simply expand the appropriate level to find and select the most descriptive level available.
Event Location Preference:	This field allows admins to see and/or set a default location preference for a user. If the user has set their own default location, that will be displayed here.
Organization Chart Assignment:	Indicates where within the company's Organizational Chart the user is positioned. Click the **Assign** link to select a level and role. Once selected, details regarding the associated Manager for this user will also be displayed.
Shared Mobile Devices:	This field allows admins to set a shared mobile device membership, this is used when users within the same physical location share one or multiple mobile devices. The device itself is defined as the "group" so that all users in that location can access the device who are members of that group.

Tip: Again, if your organization has the OnPoint LMS integrated with an internal HRIS or other system that regularly feeds user import detail, it is likely that those imports will automatically drive user assignments, including memberships. It may be that you will not need to make manual assignments to users here under this sub-tab.

1.1.3.5 Users New User: Test Scores

The next option Tab 5 for a User record is the Test Scores tab. From this submenu, Administrators can view detailed test results for the Users, including Course Test Scores, Assessment Set Test Scores, Nugget Test Scores, SCORM Course Scores, and User Survey Results..

Data fields for test scores set up include the below categories:

Users & Groups: Test Scores Sub-Tab	
Element	**Description**
Course Test Scores:	Provides detailed information pertaining to all test scores associated with a Course, including Id, date of the test, the attempt of the user to take the test, the score and status and a link to **View** the Assessment and see the user's answers and the correct answers.
Assessment Set Test Scores:	Provides detailed information about all test scores associated with any Assessment Set, including Id, date of the test, the attempt of the user to take the test, the score and status, and a link to **View** the Assessment and see the user's answers and the correct answers.
Nugget Test Scores:	Provides detailed information about all test scores associated with any Nuggets assigned to this user, including Id,date of the test, the attempt of the user to take the test, the score and status, and a link to **View** the Assessment and see the user's answers and the correct answers.
SCORM Course Scores:	Provides detailed information about all test scores associated with any SCORM Course's assigned to this user, including the SCO Id, Status, Max Score and User Score
User Survey Results:	Provides all survey detail associated with any courses, nuggets, or assessment sets assigned to this user, including Id,date of the survey, the attempt of the user to take the survey, status, and a link to **View** the Survey and see the user's responses.

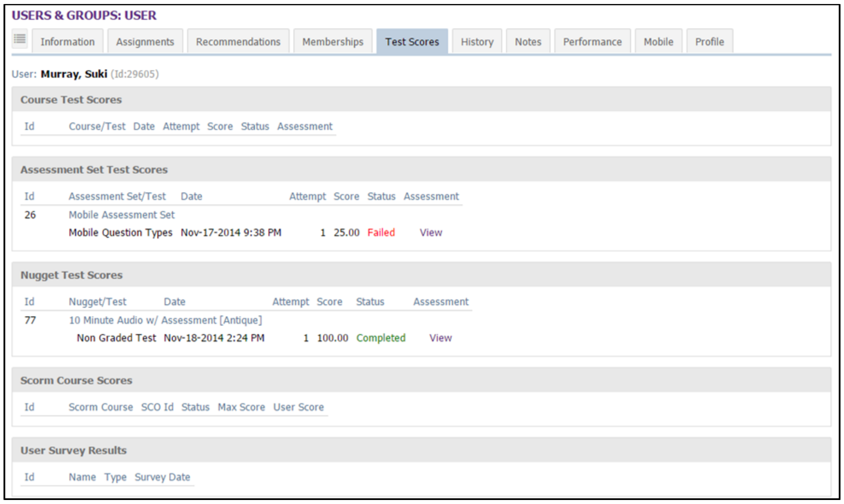


Figure 1-11 – Users & Groups: Test Scores Sub-Tab

1.1.3.6 Users New User: History

The next option Tab 6 for a User record is the History tab. From this submenu, Administrators can view assignments that have been archived for this user. Archived assignments no longer appear in the user's portal as active assignments. This helps to keep the list of assignments manageable from year to year.

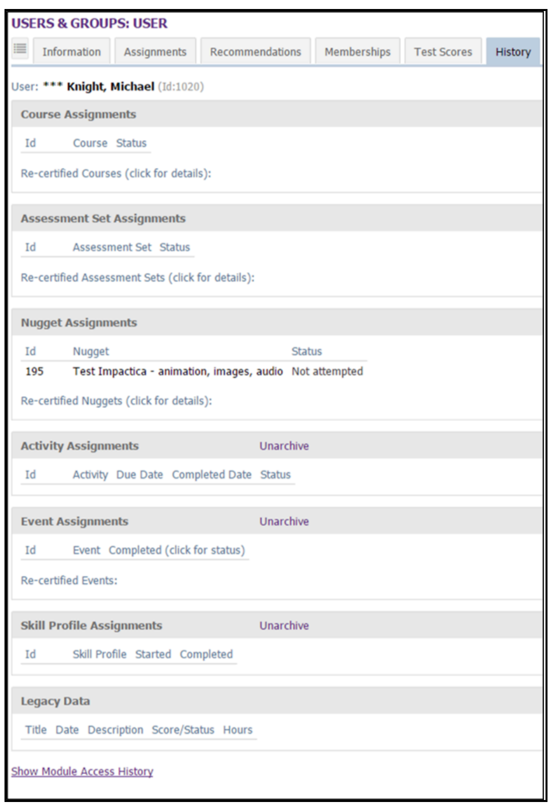


Figure 1-12A – Users & Groups: History Sub-Tab

The History tab displays the items from a user's record that have been archived, including:

Users & Groups: History Sub-Tab	
Element	**Description**
Course Assignments:	Indicates all the archived Course assignments for the selected user. To unarchive any Course, click the corresponding status link, update the archive status condition by clicking the **Unarchive to Assignments** button to the far right**.** The Course will be removed from the History sub-tab and added back under the Assignments sub-tab**.**
Assessment Set Assignments:	Indicates all of the archived Assessment Set assignments for the selected user. To unarchive any Assessment Set, follow the same steps as described for Course Assignments above.
Nugget Assignments:	Indicates all of the archived Nuggets for the selected user. To remove a Nugget from archive, follow the same steps as described for Course Assignments above.
Activity Assignments:	Indicates all of the archived Activities for the selected user. To unarchive any Activity, click the **Unarchive** link.
Event Assignments:	Indicates all of the archived Events for the selected User. To unarchive any Event, click the **Unarchive** link.
Skill Profile Assignments:	Indicates all of the archived Skill Profiles for the selected user. To unarchive any Skill Profile, click the **Unarchive** link.
Legacy Data:	This area of the history tab displays any detail imported from a third party system that the customer requested in order to create a full view of the users history.

The below are screen shots to show how to take an item that has been archived for a user and place it back within their assignments tab. You must first click on the status listed next to the course. The status is highlighted in the example below.

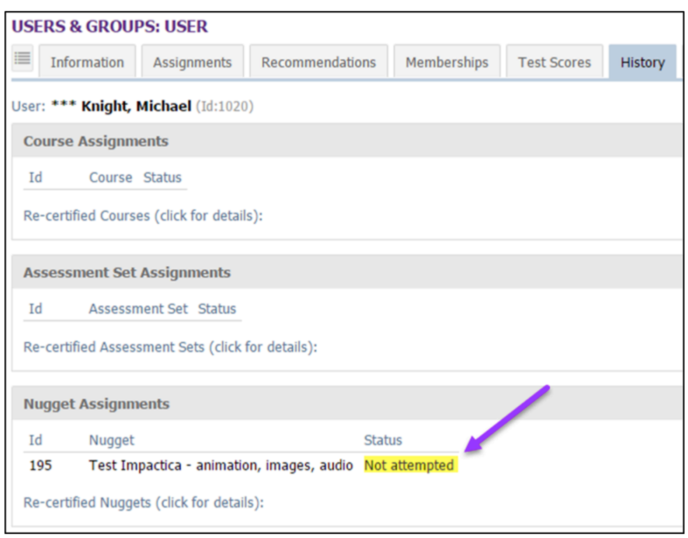


Figure 1-12B – Users & Groups: History Sub-Tab - Status Link

After selecting the status in the history you will receive a new screen labeled **Nugget Status View**. This will display the class and the information regarding when it was assigned/completed and when access to the course began and ended. At the bottom of the screen there is an option to **Unarchive to Assignments**. Select this option. Once completed the user will then be able to see the nugget assignment view again and this time it should show that the nugget is now listed under the assignments tab.

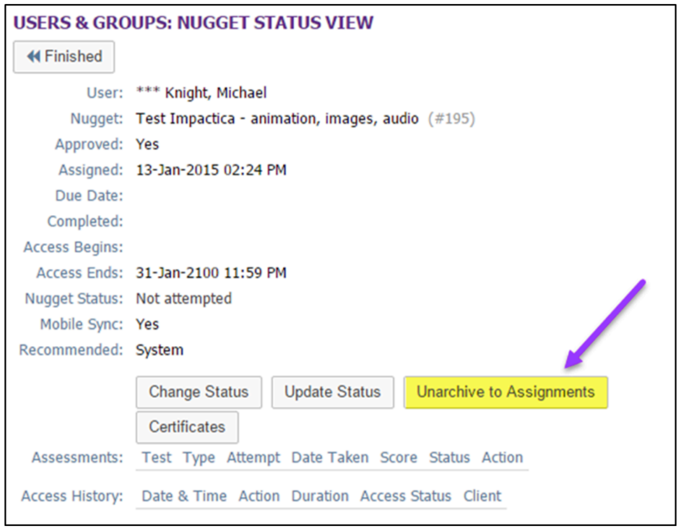


Figure 1-12C – Users & Groups: History Sub-Tab - Unarchive Link

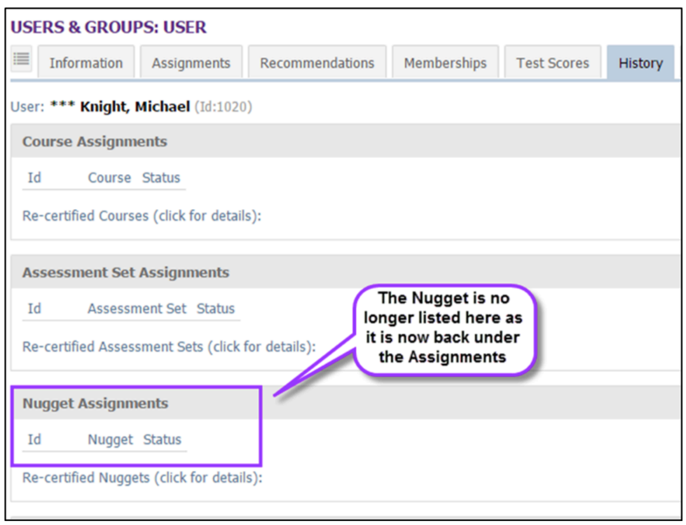


Figure 1-12D – Users & Groups: History Sub-Tab - Updated Course Status

1.1.3.7 Users New User: Notes

The next option Tab 7 for a User record is the Notes tab. From this submenu, Administrators can view and add any necessary notes regarding the user. This feature is not meant to be a help desk log or HR-related issue field, but rather is designed to allow administrators to add a brief notation that may need to be tracked in association with the user. For example, John Doe uses an older PC from home, and often has trouble streaming certain types of content during an online course.

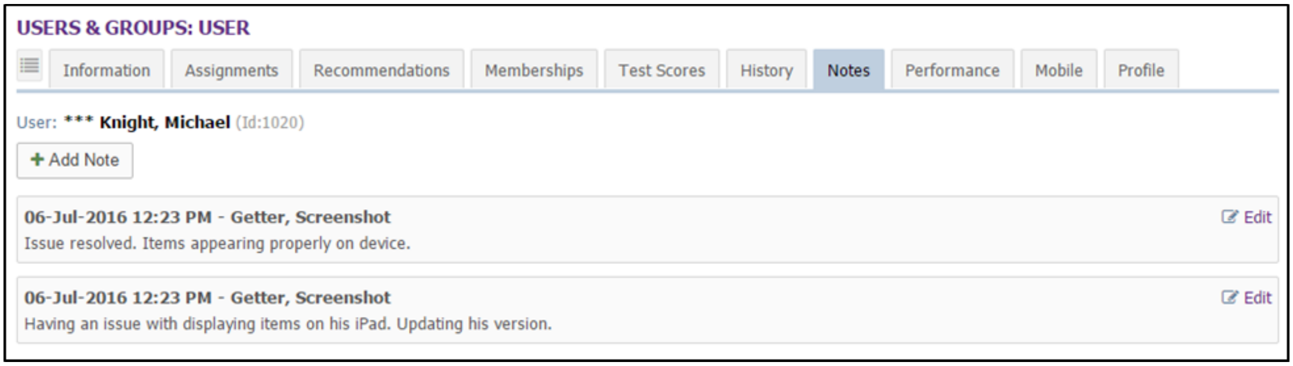


Figure 1-13 – Users & Groups: Notes Sub-Tab

The Notes tab displays any notes recorded to date, and allows administrators to contribute additional notes when necessary. Page elements include:

Users & Groups: Notes Sub-Tab	
Element	**Description**
Note Detail:	Shows the date, time, and Administrator that entered the note.
Edit Link:	Click the edit link to change the note; click **Save** to save your updates. To delete the note, click the checkbox **Delete this note** and click the **Save** button.
+ Add Note	Click the **Add Note** button to add a new note. Click **Save** to save your new note. Click **Cancel** to exit without saving your new note.

Notes are viewable only by administrators with Course Manager access. They are not viewable by Users or Group/Reporting Managers.

1.1.3.8 Users New User: Performance

The next option Tab 8 for a User record is the Performance tab. Administrators can view performance-based documents specific to the user. **The Performance tab is present if the optional OnPoint Performance Plus Module has been purchased.** This feature set allows evaluations to be selected and assigned to the user that will be routed based on a defined routing/workflow schema and populated Organizational Chart.

Please refer to the Performance Plus Module Guide for an overview discussion of the module and how it can support the appraisal process, along with an in-depth description of its unique features.

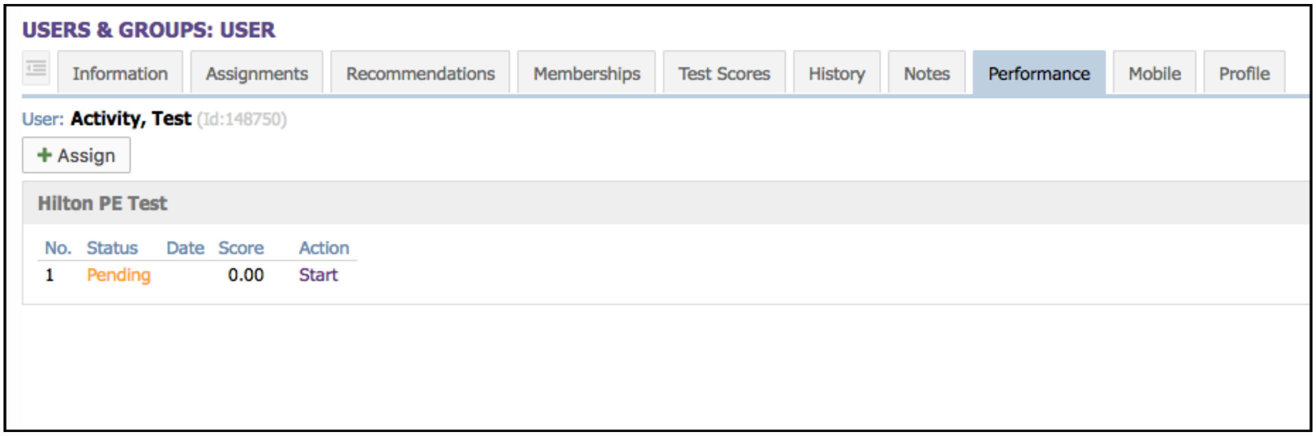


Figure 1-14 – Users & Groups: Performance Sub-Tab

1.1.3.9 Users New User: Mobile

The next option Tab 9 for a User record is the Mobile tab. From this submenu, Administrators can view and update a user's mobile device information.

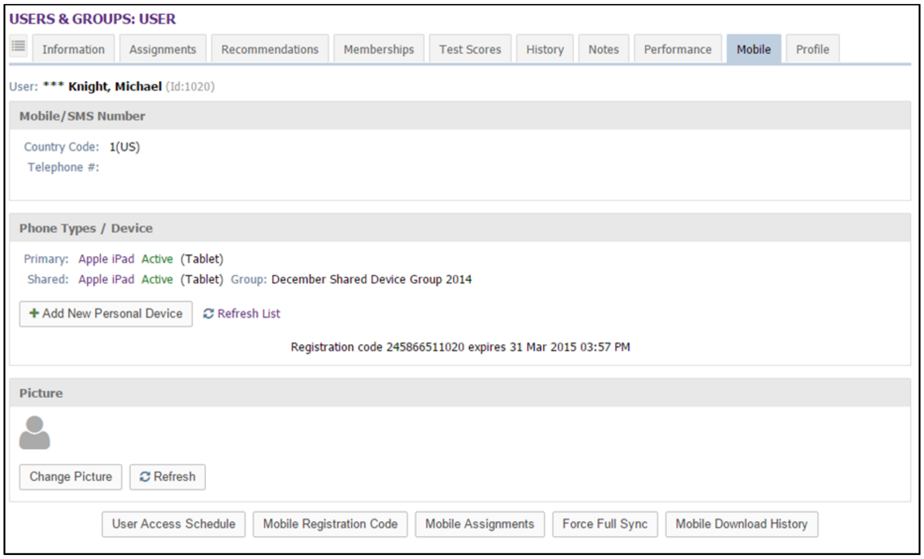


Figure 1-15A – Users & Groups: Mobile Sub-Tab

Data fields include the below options:

Users & Groups: Mobile Sub-Tab Buttons	
Element	**Description**
Mobile SMS Number:	The Mobile / SMS number is captured from the Information tab previously covered. Clicking on the link "**Send SMS Message**" will display.
Phone Types / Device:	The device used to access the mobile app will be listed here. The **Add a New Personal Device** button allows for additional devices to be added to the user profile.
Picture:	A picture of the user can be added here. The **Change Picture** button will allow browsing to find a file to upload.

At the bottom of the tab are the following buttons:

Users & Groups: Mobile Sub-Tab Fields	
Element	**Description**
User Access Schedule:	Allows for the limiting of user access based on day of week and time of day. This is in one-hour increments.

Mobile Registration Code:	Clicking on this will bring up the Mobile Registration Code popup window. This will allow an admin to produce a Mobile Registration code that can be emailed and is displayed. You can also produce a QR code to work easily with mobile devices and you can set the code to expire, set max uses, and set parameters on the password (User must enter user name and password, Force to change password or no username or password needed) upon registration.
Mobile Assignments:	Displays full list of Mobile courses and nuggets assigned to the user. Includes Id, Name of course, Status, Playlist(s), Size of file, and Sync size.
Force Full Sync:	This button will invoke a full versus a partial sync for the users mobile device to ensure any new content to be downloaded or test results to be viewable that have not fully synced will be fully downloaded.
Mobile Download History:	Displays the files the mobile user downloaded to their device. Table includes, Date of download, Device type, Type of file, Id of file, Size and if full download was completed.

Tip: After editing a record and saving your updates, click the **Refresh** button to make sure all your changes are displayed.

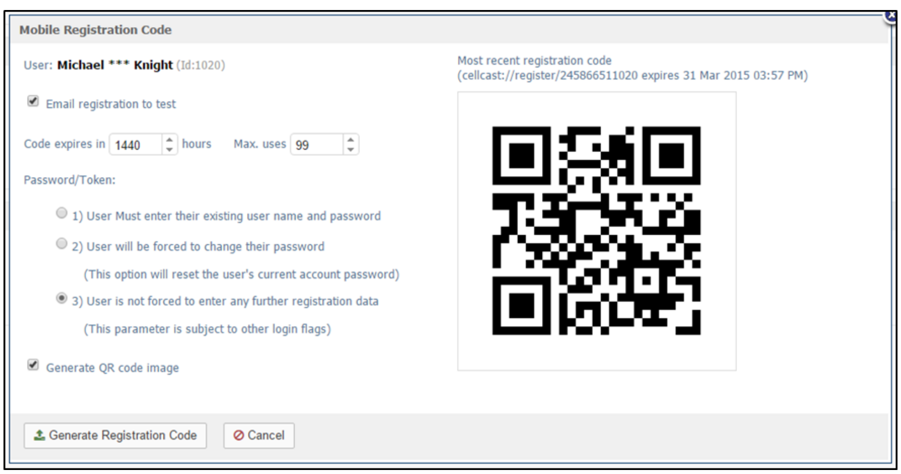


Figure 1-15B-Users & Groups: Mobile Registration Code

Send Test SMS Message

If a mobile number has been entered on the User Information tab, the ability to **Send a Test SMS Message** link will appear. A pop-up window will display with the following information:

- User
- Country Code (dialed prefix)
- Mobile Number

You may enter a short message (140) in the Test Message field.

Note: The length of incoming SMS messages may be limited by the recipient's wireless service provider.

Click the **Send Message** button to deliver the SMS message, or the **Close** link to cancel this test without sending a message.

If the test is successful, a transaction message and delivery code will display.

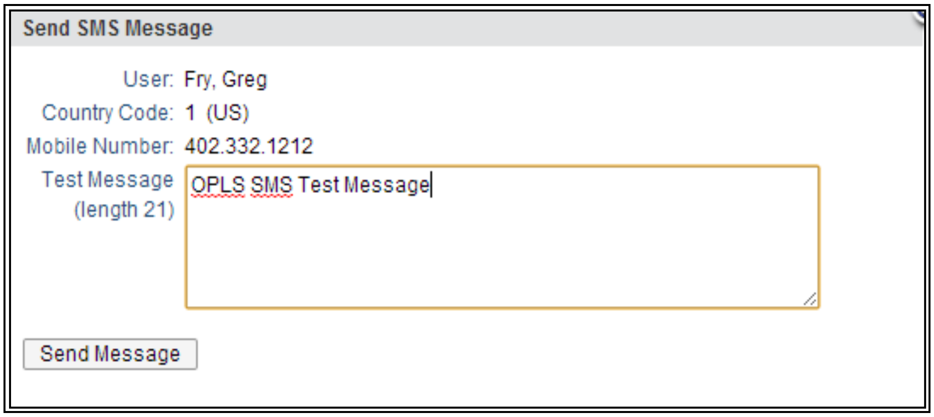


Figure 1-15C – Users & Groups: Send Test SMS Message Option

The Mobile information fields can be edited at any time with additional or updated information by clicking the **Device** to be updated.

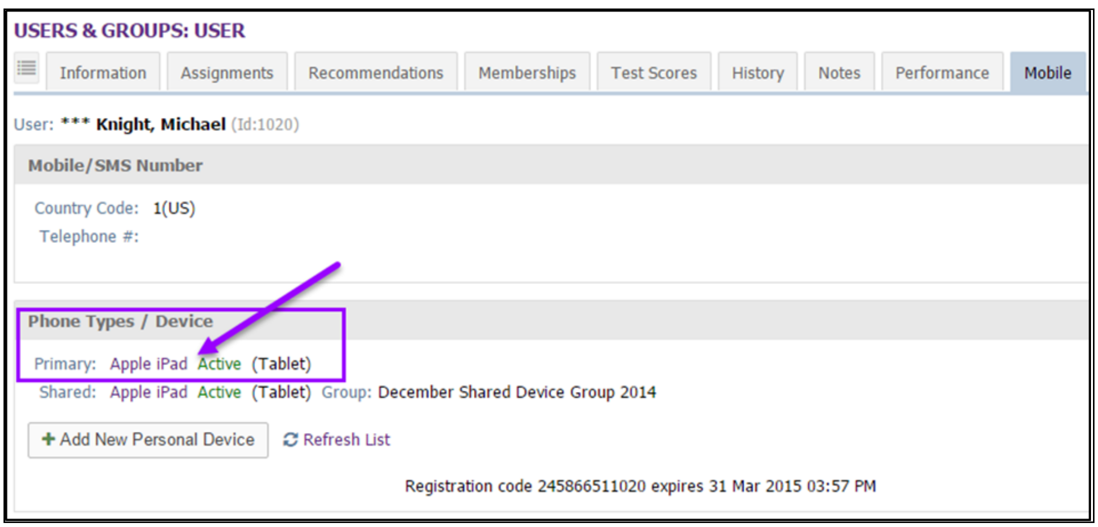


Figure 1-15D – Users & Groups: Selecting Device to Edit

The next screen will allow the user to make the necessary updates to the Device selected. The user has an option on this screen to make the updates and **Save** the changes, **Cancel** out of the screen which will not save any changes that were made, **Close** out of the screen, or to **Delete** the device from the user profile.

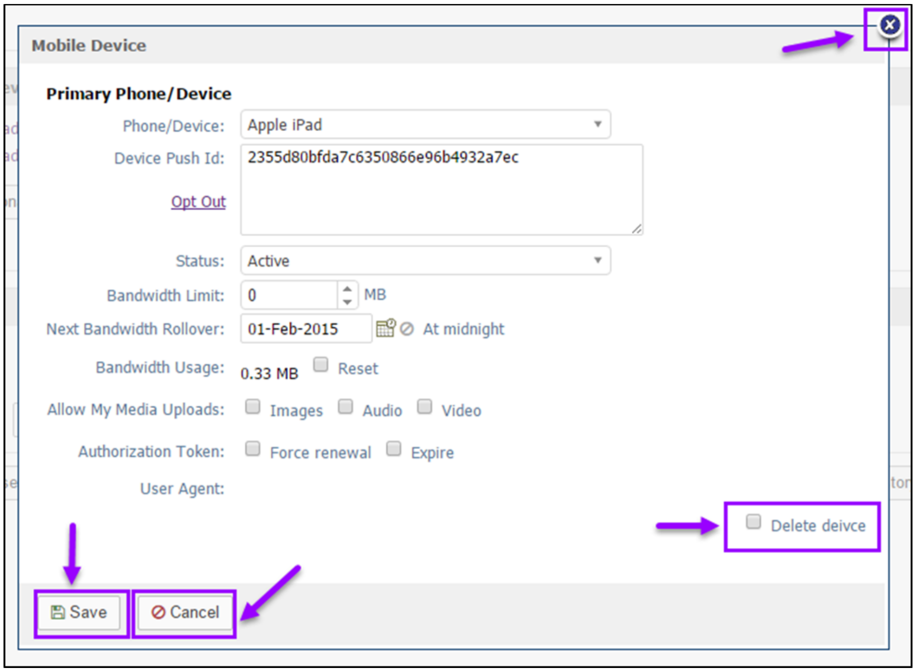


Figure 1-15E – Users & Groups: Edits to Devices

1.1.3.11 Users New User: E-Commerce

If the client has purchased this Module (Ecommerce) then this section displays the transactions the user has purchased. Table displays the Order ID, Date, Item(s), Summary and Price.

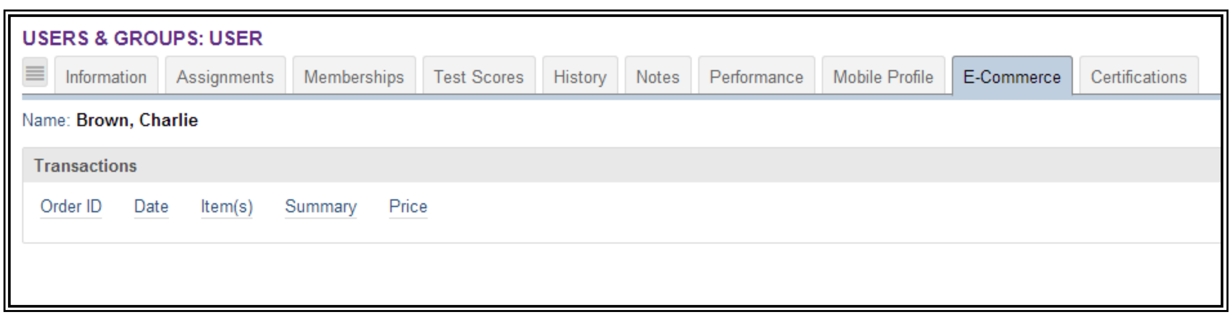


Figure 1-17 – Users & Groups: E-Commerce

1.1.4 Users & Managers: System Roles

The OnPoint system supports a number of different User and Manager roles which govern access and use of the system. This section provides a listing and description of each of the defined roles. The quantity of licenses purchased by the customer will determine the number of available users in each role.

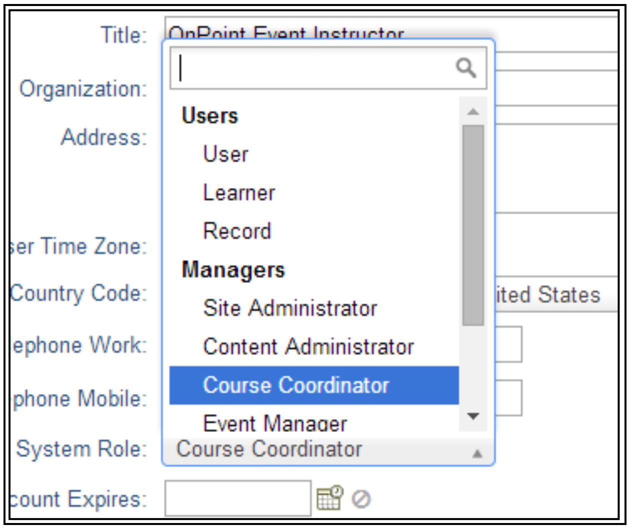


Figure 1-18 – Users & Groups: System Roles

Defined System Roles include:

Users & Groups: System Roles	
Element	**Description**
System Roles (Users):	The assigned level of the User. Select from the following: • **User Role** (Level 3) – The most commonly used system role; permits the defined User to access the Portal and Content Viewer and provides open access and navigation to all non-restricted learning and development materials. • **Learner Role** (Level 2) – The second most commonly used system role; permits the defined Learner to access the Portal and Content Viewer; provides open access to all non-restricted learning and development materials, but restricts navigation to linear paths only. • **Record Role** (Level 1) – Record-level roles are the lowest level role and are designed for recordkeeping purposes only. They allow organizations to maintain online histories of personnel that no longer have access to the OnPoint Content Viewer or Portal to take Courses, Assessments, etc. Record-level seats are most commonly used to archive the system histories of User-level and Learner-level accounts when they leave the organization. Record-level seats are more cost effective than User and Learner-level seats; one a user's status is changed to a "Record", the user license seat is freed up to be re-used for a new Active User. **Note:** For example, "Learners" must progress through an assigned Course sequentially (Page 1 followed by Page 2) whereas "Users" may jump around within a Course as they desire and review pages in any order they choose.

Performance Managers:	The assignable levels for Managers. Select from the following: • **Group Manager** - In addition to full User-level capabilities, personnel with Group Manager-level system roles have the ability to access progress summaries and histories for all members of their department or Group using OnPoint Performance Manager ("OPPM) application. Via OPPM, Group Managers can view information, generate reports, make user level assignments to those members within their group (s), and create new users through the OPPM interface. Users created by a Group Manager are automatically assigned to the group the Group Manager manages. • **Reporting Manager** - In addition to full User-level capabilities, personnel with Reporting Manager-level system roles have the ability to access progress summaries and histories for all members of their department or Group using OnPoint Performance Manager ("OPPM) application. Via OPPM, Reporting Managers can view information and generate reports but they cannot make assignments. • **Document Administrator** - In addition to full User-level capabilities, personnel with Document Administrator-level system roles has the ability to edit and maintain Document Manager (OPDOC) menus and administration. This level of administrator has Root level access to the OPDOC, for the purpose of creating menu systems, setting up preferences, and determining security for menus and docs within the group Document Manager instance they are assigned to manage.
Administrators:	The assignable levels for Administrators. Select from the following: • **Root Administrator -** This is typically an OnPoint role, it has access to all features and functions of the system including control over the server. • **Site Administrator** – Site Administrator-level accounts have full system rights to the select server slice they are assigned to. Personnel with Site Admin-level accounts can also be assigned to courseware and other standard system services. • **Content Administrator** – These accounts permit access to most slice features including deletion tasks but exclude Site/System-related configuration menus and utilities. • **Course Coordinator** – In addition to full User-level capabilities, personnel with Course Coordinator-level system roles have the ability to design and edit Courses and Assessments and make assignments to other personnel. • **Event Manager** – Ability to schedule and edit event calendars only.

1.1.5 Users & Managers: Edit a User or Manager Record

To Edit a User record, select the user you wish to edit from the **Users & Groups: Users** list by clicking on the user. The User record will display, defaulted on the Information sub-tab page.

Action buttons that appear across the lower portion of the User Record Information page include the **Edit** button which will allow you to view and edit the data fields for your selected record, the **Refresh** button which allows you to refresh the page with recent updates if needed, the **List** button which will return you to the previous listing that you were working from, the **User Actions** button allows you to access the Login Action, Reset User History, and User Flag Values. The **Assignment Views** button allows you to access the Assignment Status, Competency Matrix, User Certificates, Access History, and Trigger Execution Log.

During the Edit process, when you have completed your changes, scroll down and you can choose to **Save** any changes that were made or **Cancel** the changes and exit the page without making any changes.

All user information fields can be edited at any time with additional or updated information. The **Edit** button is required to update the user information fields of a User record.

Tip: After editing a record and saving your updates, click the **Refresh** button to make sure all your changes are displayed.

Note: You must be a higher-level administrator to edit another manager's record.

Additional Action Buttons appearing across the bottom right of the screen include:

User Actions	This button allows you to access the Login Action, Reset User History, and User Flag Values.
Assignment Views	This button allows you to access the Assignment Status, Competency Matrix, User Certificates, Access History, and Trigger Execution Log.

Reset User History

Click one or more of the checkboxes as required in order to reset a user's status when needed for the available options.

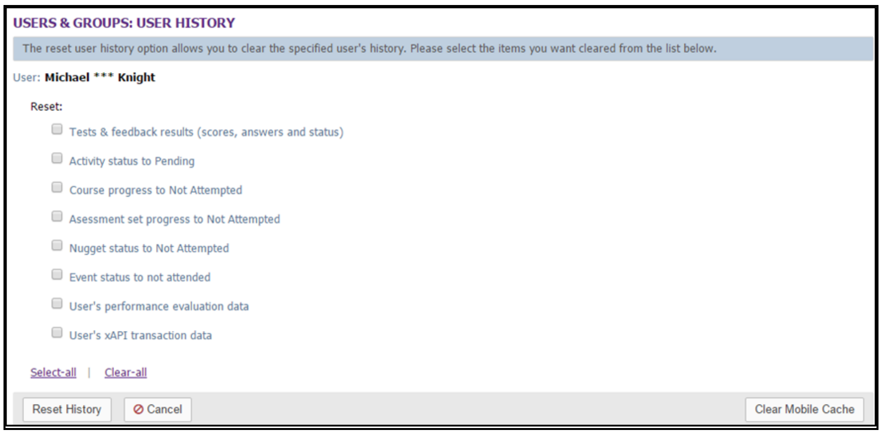


Figure 1-19 – Users & Groups: Reset User History

Action links and buttons include:

Users & Groups: Action Buttons	
Elements	**Description**
select-all	This short-cut action places a check in all available checkboxes.
clear-all	This short-cut action removes all checks inside the checkboxes.
Reset History	Once you have determined which items you wish to reset for the user, click the **Reset History** button. **Tip:** Be sure about your selection before you click the **Reset History** button. Once the command is placed, the action is immediately performed and cannot be reversed.
Cancel	Click the **Cancel** button to return to the user record.
Clear Mobile Cache	This action button can be used to force the cell cast app's cache to be cleared in the event it is interfering with the device receiving new data.

Updating User-Level Assignments

The second sub-tab of the User record displays assignments for the User.

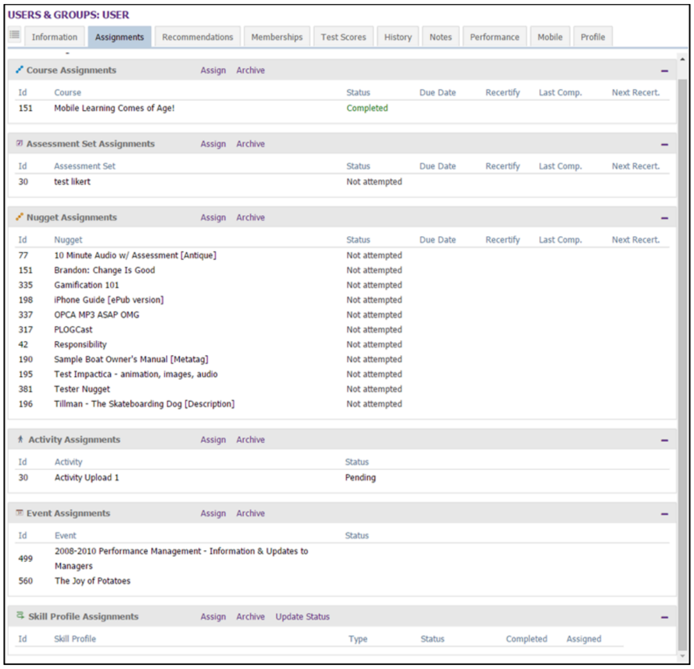


Figure 1-20 – Users & Groups: User Assignment Editing

The Assignments sub-tab displays the completion status of all assignments for the user. Assignments are listed alphabetically underneath each assignment type, as follows:

Users & Groups: Assignment Types	
Element	**Description**
Course Assignments:	Indicates which Courses the user is currently assigned to take. Click the Assign link to add new Courses or to change the current assignment(s). Click the **Assign orUnassign** button to commit your changes and click the **Finished** button to return to the Assignments screen. Archive completed Courses by clicking the **Archive** link. To Edit the status of any specific Course Assignment, click the Assignment and then select the **Change Status** button.
Assessment Set Assignments:	Indicates which Assessments the user is currently assigned to take. Click the **Assign** link to add new Assessment Set assignments or to change the current assignment(s). Click either the **Assign or Unassign** button to commit your changes and click the **Finished** button to return to the Assignments screen. Archive completed Assessments by clicking the **Archive** link. To Edit the status of any specific Assessment Set Assignment, click the Assignment and then select the **Change Status** button.
Nugget Assignments:	Indicates which Nuggets the user is currently assigned to complete. Click the **Assign** link to add new Nugget assignments or to change the current assignment(s). Click either the **Assign or Unassign** button to commit your changes and click the **Finished** button to return to the Assignments screen. Archive completed Nuggets by clicking the **Archive** link. To Edit the status of any specific Nugget Assignment, click the Assignment and then select the **Change Status** button.
Activity Assignments:	Indicates which Activities the user is currently assigned to complete. Click the **Assign** link to add new Activity assignments or to change the current assignment(s). Click either the **Assign** or **Unassign** button to commit your changes and click the **Finished** button to return to the Assignments screen. Archive completed Activities by clicking the **Archive** link. To Edit the status of any specific Activity Assignment, select the Assignment to open the **Activities: Activity Status** screen and update the status.

Users & Groups: Assignment Types	
Element	**Description**
Event Assignments:	Indicates which Events in which the user is currently assigned to participate. Click the **Assign** link to add new Event assignments or to change the current assignment(s) and click the **Finished** button to return to the Assignments screen. Archive completed Events by clicking the **Archive** link. To Edit the status of any specific Event Assignment, click the **Completed** link to the right of the assignment name (Yes or No).
Skill Profile Assignments:	Indicates which Skill Profiles the user is currently assigned to. Click the **Assign** link to add new Skill Profile assignments or to change the current assignment(s). Click either the **Assign or Unassign** button to commit your changes and click the **Finished** button to return to the Assignments screen. Archive completed Skill Profiles by clicking the **Archive** link. The **Update Status** link is designed to allow an Administrator to reset the completion status of a profile. When an Administrator adds an item to a Skill Profile, they may need to "update" the completion status for Users. A global setting can be made that governs whether an otherwise "Completed" status for users would be set back to "Incomplete" with the new item addition, or not.

All User assignment fields can be edited at any time with additional or updated information. No "Edit" button is required to update the assignment fields of a User record. See the following sub-sections for detailed instructions on editing the assignment status fields.

1.1.5.1 Edit User or Manager: Edit Course Status

A user's course status can be edited by clicking on the Course. The **Users & Groups: Course Status View** page will appear and display fields for User name, Course name, Approved status, Assigned date, Due date, Completed date, Access Begins and Ends dates, Course Status, Mobile Sync, and Recommended fields.

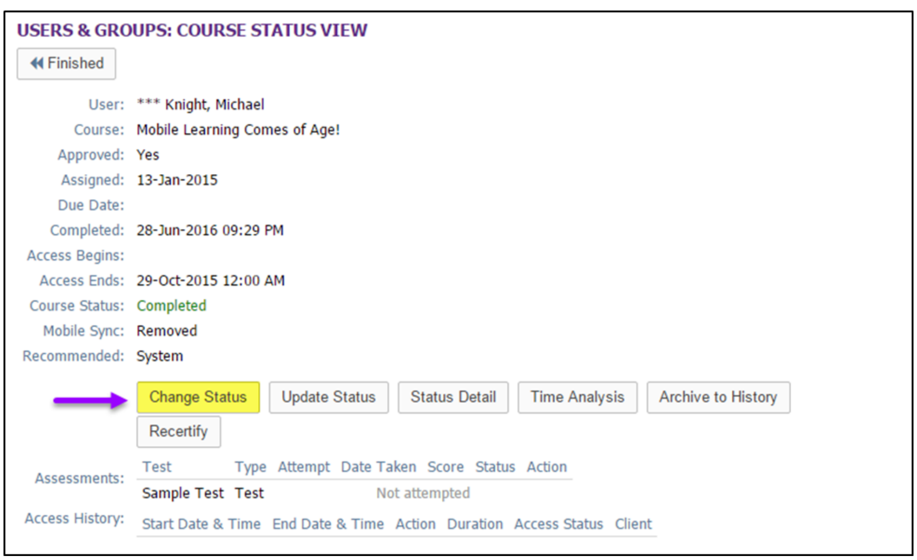


Figure 1-21 – Users & Groups: Course Status View

Editable fields include:

Users & Groups: Course Status View page	
Element	**Description**
Course Status:	Indicates the status of the user in this particular course (e.g. Completed, "Failed", Incomplete, Not Attempted). Administrators can change the completion status as well as the date the course was assigned and completed by clicking the **Change Status** button.
Assessments:	Lists the tests associated with this course and each attempt that a user has made to take the test and those results. Clicking the **Edit** link in the Action column allows an Administrator to edit the test results**.** Click the **View** link in the Action column to open a view of the test questions and answers given. Click the **Close** link to close the window.

Tip: If an Administrator needs to record course-related test scores for a test taken off-line, this can be accomplished by entering a score where no score actually existed. A "dummy" test is made and assigned to the course, then scores can be added in manually here.

The Course Status View page also auto-displays:

Access History:	Displays system-generated details including the Start Date & Time, End Date & Time, Action, Duration, Access Status, and Client. This data only shows SESSION details not Page Time Analysis data.

Click the **Finished** button to return to the User record.

Edit the User's Completion Status of a Course

Administrators can change the status of a user's course as well as the date the course was assigned and completed by clicking the **Change Status** button on the **Course Status View** Page.

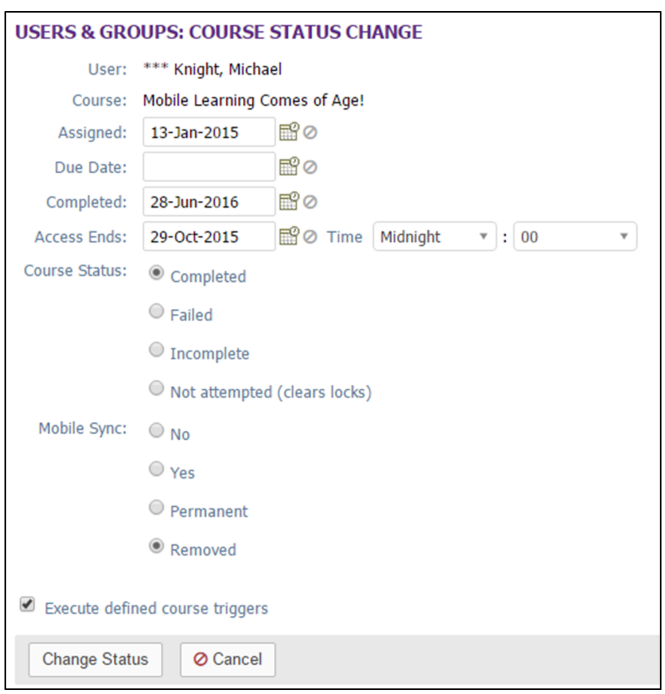


Figure 1-22A - Users & Groups: Course Status Change

The Course Status Change window displays the User name and Course name. Administrators may enter new information for the Assigned date, Due Date, Completed date, and Access Ends date (click the calendar icon for a shortcut and to ensure the correct date format is entered). Click the radio button to select the desired Course Status and whether to allow Mobile Sync.

> **Note:** Changing the Course Status to "Not Attempted" clears out any course locks and allows users to start a course over again.

At anytime during this edit you may click **Change Status** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

Additional links to the right of the **Change Status** button on the **Course Status View** page include:

Users & Groups: Course Change Status	
Element	**Description**
Update Status:	Performs a real-time system check to ensure an up-to-date status is reflected for this particular user. When this link is selected, you will not see any pop-up or results message. This action is similar to a "Refresh" in a browser.
Status Detail:	Lists each page of the course viewed by the user, and the completion status of each page visit. Click the **Close** link to close the window. This is also where the SCORM page status is presented as reported after users last logout from a SCORM course.
Time Analysis:	Compares the number of times this user visited each page, and the total and average amount of time spent on each page visit, against the number of visits and time other learners/users spent on the same pages of this course. Click the **Close** link to close the window.
Archive to History:	Allows an Administrator to archive just this specific course. Clicking this link moves the course listing from the user's current Assignments to the user's History sub-tab, and returns you to the Assignments sub-tab. Click the History sub-tab to see the Course listed there now. The User will no longer see this course listed under their current assignments. If all completed course assignments need to be archived, use the **Archive** link under the Assignments sub-tab.

Edit the User's Test Score within a Course

Test scores can also be edited using the **Edit** link under the Action column of the Assessments table of the Course Status View page. Clicking this link opens the User test Score Edit page.

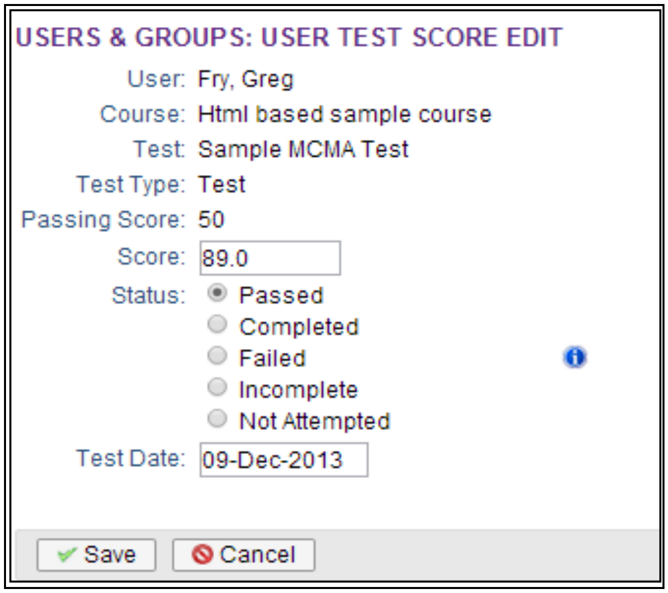


Figure 1-22B - Users & Groups: Edit User Test Score Screen

The User Test Score Edit page displays the User name, Course name, Test name and Type, and Passing Score. User's test scores can be entered into the Score input field. Change the Test Status by clicking the appropriate radio button next to the desired Status condition.

The icon gives more information on the use of the Score input field and when to use each of the statuses listed. Test Date information can be altered using the Test Date input field (use the pop-up calendar icon for a shortcut and to ensure the correct date format is entered).

At anytime during this edit you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

View the User's Test Results within a Course

Click the **View** link to review the test results in detail, showing both the questions asked and the answers provided by the user.

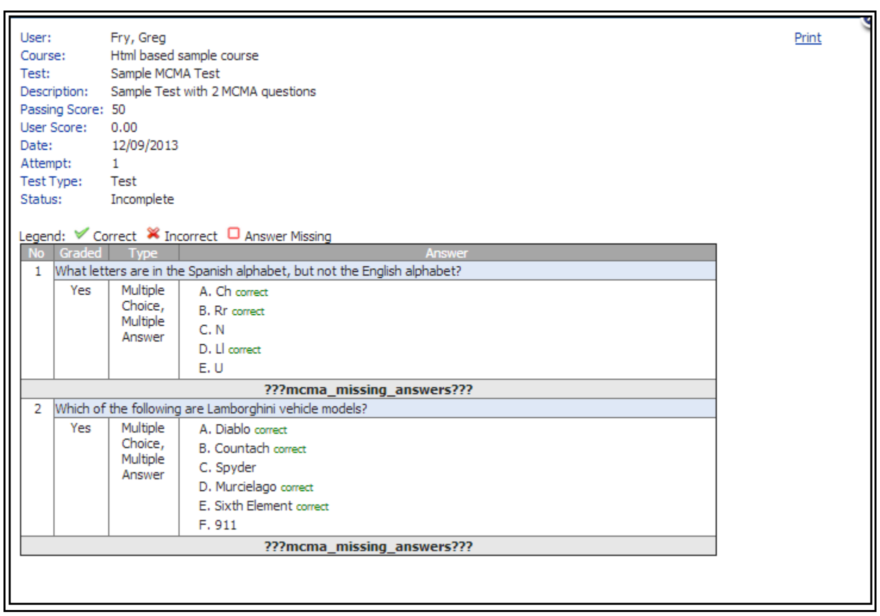


Figure 1-23 - Users & Groups: View User Test Results screen

1.1.5.2 Edit User or Manager: Edit Assessment Set Status

A User's Assessment Set status can be edited by selecting the Assessment Set which will bring you to the **Assessment Set Status View** page and then select the **Change Status** button. The Assessment Set Status View page will also display fields for User name, Assessment Set name, Approved status, Assigned date, Due Date, Completed date, Access Ends, Assessment Set Status, and Recommended fields.

Figure 1-24 – Users & Groups: Assessment Set Status link

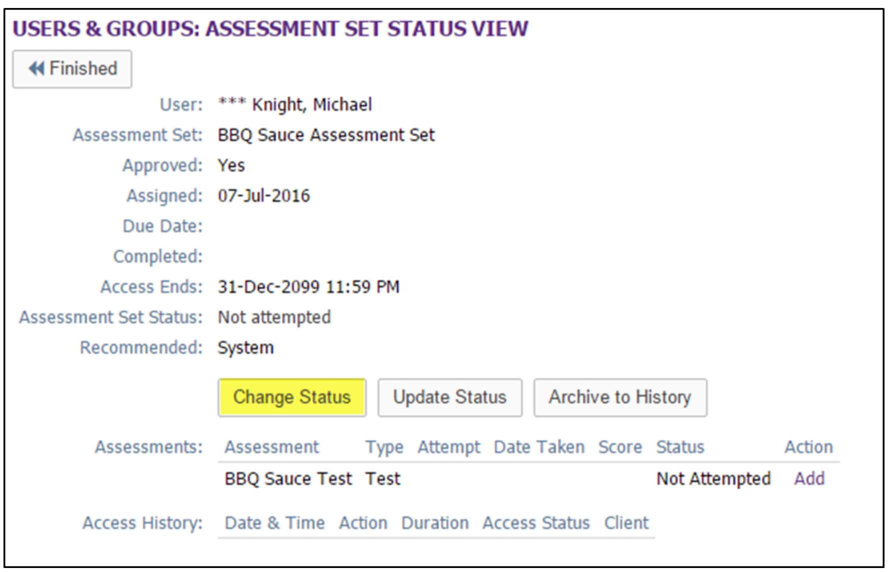


Figure 1-25 – Users & Groups: Assessment Set Status View

Users & Groups: Assessment Set Status View	
Element	**Description**
Assessment Set Status:	Indicates the status of the user in this particular Assessment. Administrators can change the status of a user's Assessment Set as well as the date the Assessment Set was assigned or completed by clicking on **Change Status**.

Assessments:	Lists the tests associated with this Assessment Set and each attempt that a user has made to take the test and those results. Clicking the **Edit** link in the Action column allows an Administrator to edit the test results or add test results if none exist including a Score, Completion Status and Test Date. Clicking the **View** link in the Action column opens a view of the test questions and answers given. Click the **Close** link to close.

Tip: If an Administrator needs to record course-related test scores for a test taken off-line, this can be accomplished by entering a score where no score actually existed. A "dummy" test is made and assigned to the course, then scores can be added in manually here.

The Assessment Set Status View page also auto-displays:

Access History:	Displays system-generated detail including the Date & Time, Action, Duration, Access Status, and Client of the User's access to this Assessment Set.

Click the **Finished** button to return to the User record.

Change the User's Completion Status of an Assessment Set

Administrators can change the status of a user's Assessment Set by clicking the **Change Status** button on the **Assessment Set Status Change** page**.**

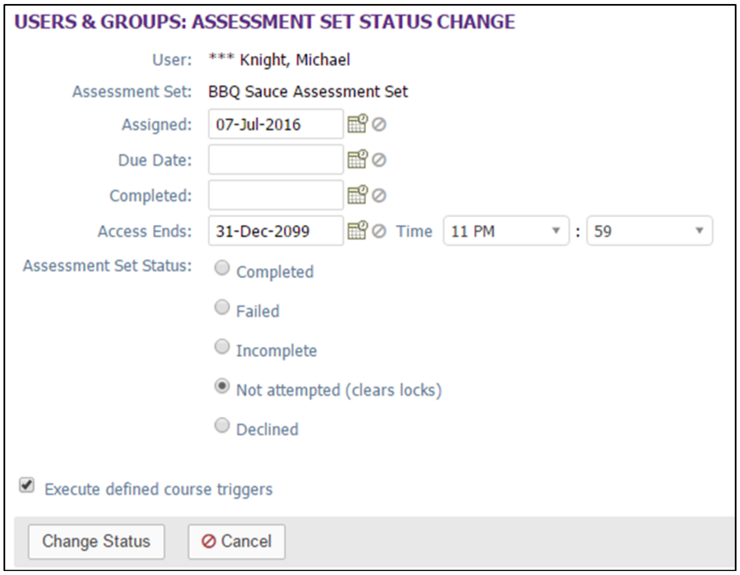


Figure 1-26 - Users & Groups: Assessment Set Status Change

Assigned, Due, and Completed dates can be altered, and the completion status can be changed by selecting the desired radio button. Note that changing the Assessment Set Status to "Not Attempted" also clears out any locks and allows users to start the assessment set over again.

At anytime during this edit you may click **Change Status** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

From the **Assessment Set Status View** page, click the **Finished** button to return to the User record.

Additional links to the right of the **Change Status** button include:

Users & Groups: Assessment Status Change	
Element	**Description**
Update Status:	Performs a real-time system check to ensure an up-to-date status is reflected for this particular user. When this link is selected, you will not see any pop-up or results message. This action is similar to a "Refresh" in a browser.
Time Analysis:	Compares the number of times the user viewed each page, and the total and average amount of time they spent on each page, against the time other learners/users visited and spent on the same pages of the assessment set and assigned tests. Click the **Close** link to close the window.
Archive to History:	Allows an Administrator to archive just this specific assessment set. Clicking this link moves the assessment set listing from the user's Assessment Set Assignments to underneath the user's History sub-tab, and returns you to the Assignments sub-tab. Click the History sub-tab to see the Assessment Set listed there now. The User will no longer see this Assessment Set listed under their current assignments. If all completed Assessment Set assignments need to be archived for this user, use the **Archive** link under the Assignments sub-tab instead of performing the function under the specific assessment set as we have just described here.

<u>Edit the User's Test Score within an Assessment Set</u>
Assessment Set test scores can also be added or edited using the links in the action column of the Assessments category on the Assessment Set Status View. Click the **Edit** link to open the User Test Score Edit page.

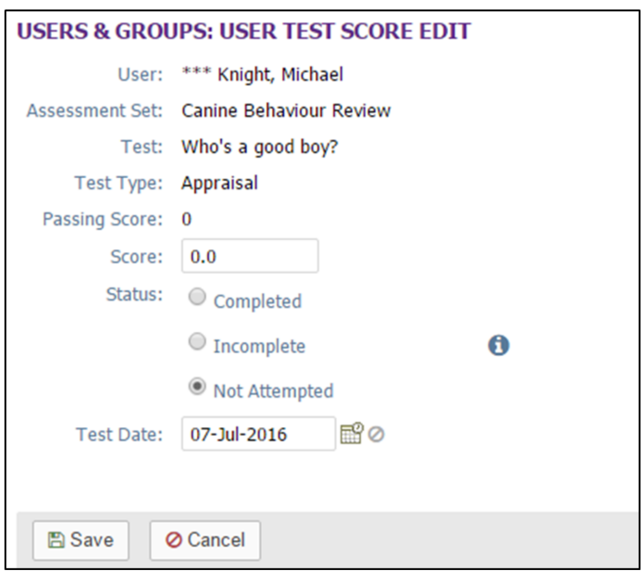


Figure 1-27 - Users & Groups: User Test Score Edit

User's test scores can be edited directly from this page. Test scores can be entered into the Score input field, and the completion Status can also be changed by clicking the desired radio button. Test Date information can be altered using the Test Date input field or the pop up calendar to the right of the field. Click the **Delete this test score** checkbox to remove an existing test score.

The icon gives more information regarding available status conditions. At anytime during this edit you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

You will be returned to the Assessment Set Status View page. Click the **Finished** button to return to the User record.

1.1.5.3 Edit User or Manager: Edit Nugget Status

A User's Nugget status can be edited by selecting the Nugget which will take you to the **Nugget Status View** page where you can select the **Change Status** button**.**

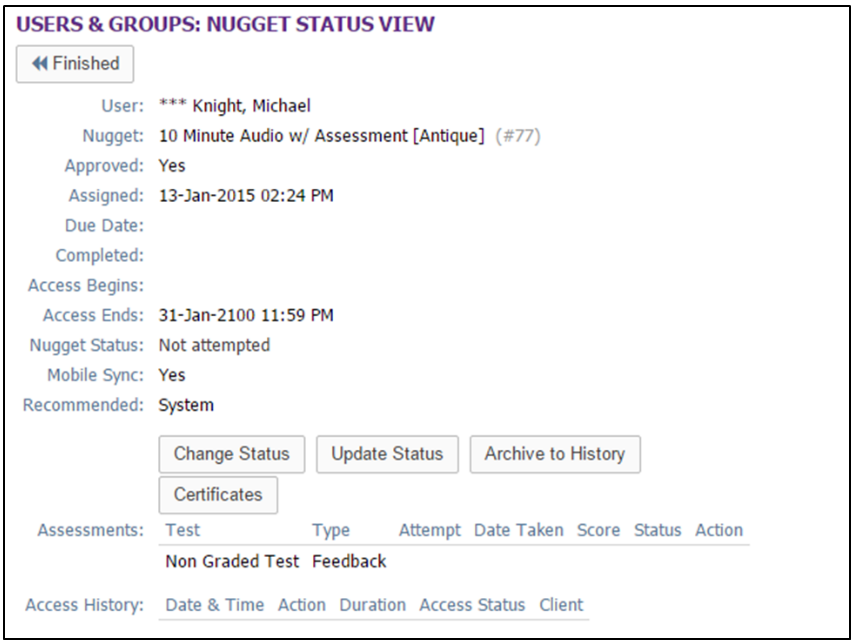


Figure 1-28 – Users & Groups: Nugget Status View

The Nugget Status View page auto-displays fields for User name, Nugget name, Approved status, and Assigned date, Due Date, Completed date, Access Begins and Ends, Nugget Status, Mobile Sync, and Recommended fields.

Editable fields include:

Users & Groups: Nugget Status View	
Element	**Description**
Nugget Status:	Indicates the status of the user in this particular Nugget (e.g. Passed, Completed, Failed, Incomplete, Not Attempted). Administrators can change the status of a user's Nugget, as well as the date the Nugget was assigned and completed by clicking the **Change Status** button**.**
Assessments:	Lists the tests associated with this Nugget and each attempt that a user has made to take the test and those results. Clicking the **Edit** link in the Action column allows an Administrator to edit the test results or add test results if none exist**.** Clicking the **View** link in the Action column opens a view of the test questions and answers given. Click the **Close** link to close the window.

The Nugget Status View page also auto-displays:

Access History:	Displays system-generated detail with the Date & Time, Action, Duration, Access Status, and Client.

Click the **Finished** button to return to the User record.

<u>Change the User's Completion Status of a Nugget</u>
Administrators can change the status of a user's Nugget by clicking the **Change Status** button.

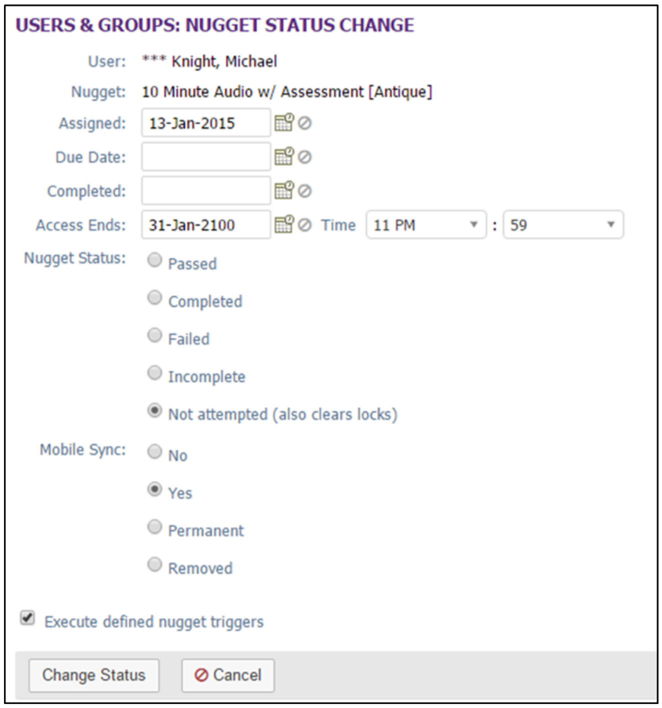


Figure 1-29 - Users & Groups: Nugget Status Change

Assigned, Due, Completed, and Access Ends dates can be altered, and the completion status can be changed by selecting the desired radio button. Note that changing the Nugget Status to "Not Attempted" also clears out any locks and allows users to start the nugget over again.

Use the Action buttons at the bottom of the screen to:

Change Status	To save any changes made to the Status of the Nugget status.
Cancel	To return to the **Nugget Status View** page without saving any changes.

Additional links to the right of the **Change Status** button include:

Users & Groups: Nugget Status Change	
Element	**Description**
Change Status:	Allows you to edit the status of the nugget for that user.
Update Status:	Performs a real-time system check to ensure an up-to-date status is reflected for this

	particular user. When this link is selected, you will not see any pop-up or results message. This action is similar to a "Refresh" in a browser.
Time Analysis:	Compares the number of times the user viewed each page, and the total and average amount of time they spent on each page, against the time other learners/users visited and spent on the same pages of the nugget and any assigned tests. Click the **Close** link to close the window.
Archive to History:	Allows an Administrator to archive just this specific nugget. Clicking this link moves the nugget listing from the user's Nugget Assignments to underneath the user's History sub-tab, and returns you to the Assignments sub-tab. Click the History sub-tab to see the Nugget listed there now. The User will no longer see this nugget listed under their current assignments. If all completed Nugget assignments need to be archived for this user, use the **Archive** link under the Assignments sub-tab instead of performing the function under the specific nugget as we have just described here.
Certificates:	Allows an admin to view any earned certificates for this nugget.

<u>Edit the User's Test Score within a Nugget</u>
Nugget test scores can also be added or edited using the links in the action column of the Assessments category on the Nugget Status View page. Clicking the **Edit** link opens the User Test Score Edit page.

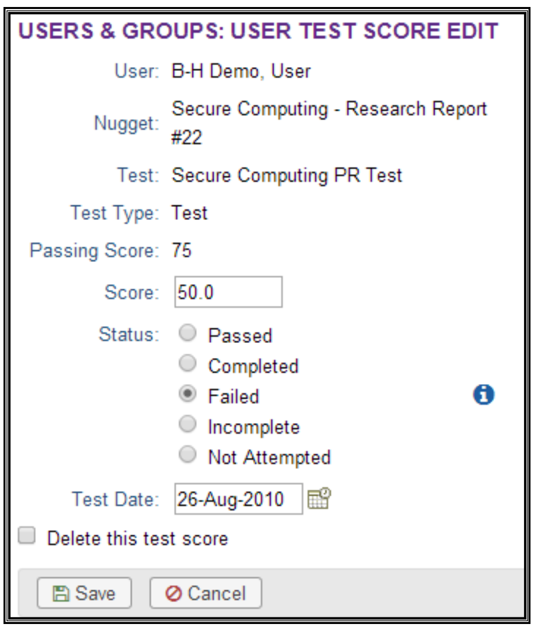


Figure 1-30 - Users & Groups: User Nugget Test Score Edit

User's test scores can be edited directly from this page. Test scores can be entered into the Score input field and the completion Status can also be changed by clicking the desired radio button. Test Date information can be altered using the Test Date input field or the pop-up calendar to the right of the field. Click the Delete this test score checkbox to remove an existing test score.

The icon gives more information on the available status conditions listed. At anytime during this edit you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

1.1.5.4 Edit User or Manager: Edit Activity Status

A user's Activity status can be edited by selecting the Activity which will take you to the **Activity Status** page where you can edit the status using the radio buttons next to the Activity Status data field.

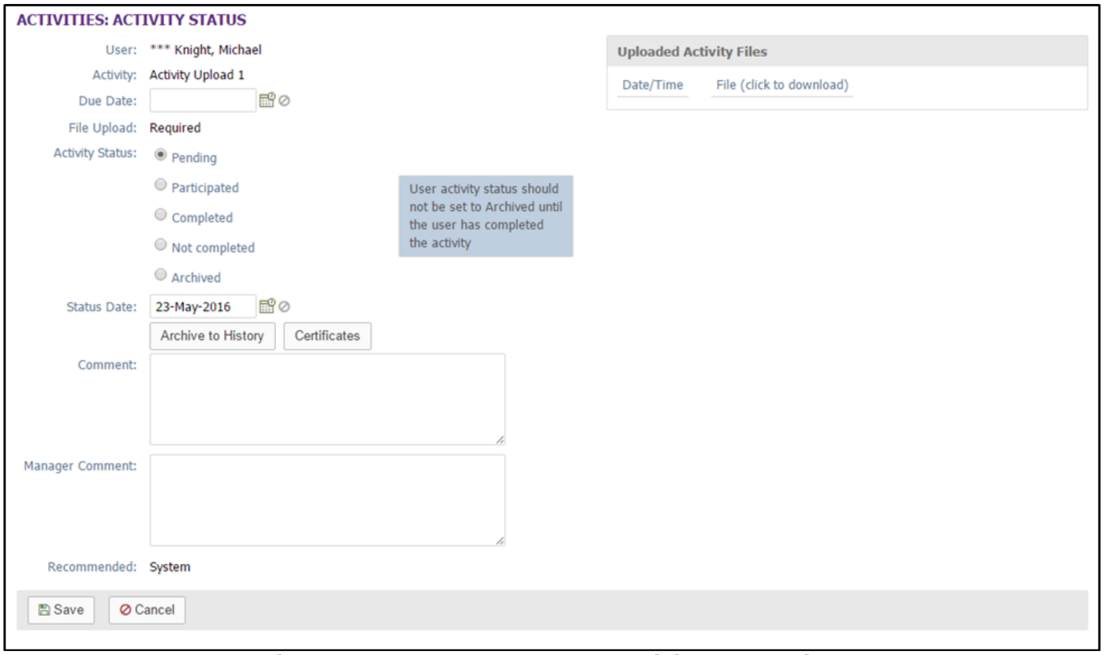


Figure 1-31 – Users & Groups: Activity Status View

The **Activity Status View** page auto-displays fields for User name, Activity name, Due Date, if a file was uploaded, Activity Status, status date, a place for usercomments and manager comments, and if it is Recommended. Editable fields include:

Users & Groups: Activity Status View	
Element	**Description**
Due Date:	Indicates the date the Activity was set to take place.
Activity Status:	Indicates the status of the Activity (Pending, Participated, Completed, Not Completed, or Archived). This status can be changed by clicking the radio button in front of the status you want the Activity to become.
Status Date:	Indicates the date the Activity was completed by the user. This field can be input or changed by an administrator.
Comment:	Comments regarding the activity or the user's participation can be saved here. Comments are only visible to administrators.
Manager Comment:	Manager Comments regarding the activity or the user's participation can be saved here. Manager Comments are only visible to administrators.

At anytime during this edit you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

1.1.5.5 Edit User or Manager: Edit Event Status

A User's Event status can be edited by clicking on **Completed** for that Event the User Event Status page will appear.

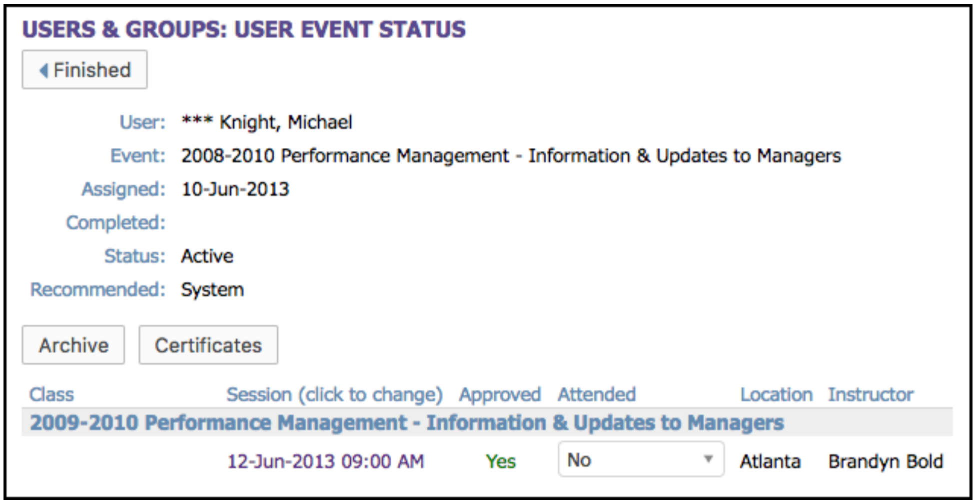


Figure 1-32 – Users & Groups: User Event Status

The **Event Status View** page auto-displays fields for User name, Event name, Status, and Recommended. Each Class of the Event is listed, along with the Session date currently assigned, the Approved and Attended Status, the Location, and the Instructor(s) of each Session. Classes within an Event must all be attended by the assigned user in order to receive a completed status for the Event. Editable fields include:

Users & Groups: User Event Status	
Element:	**Description**
Session:	Indicates the specific Session of the Class the user is assigned to attend. Administrators can change the Event session assigned or completed by clicking on the session date/time link (see below for more detail).
Approved:	Indicates whether a user has been approved by an admin to attend this particular Class of the Assigned Event. Click the Yes or No to change the entry.
Attended:	Indicates the attendance status of the user in the particular Class of the Event. Click the Yes or No to change the entry.
Location:	The physical location of the event.
Instructor:	The instructor of the event.

Click the **Finished** button to return to the User record.

<u>Change the User's Event Session Date/Time</u>

Event Session times can be changed using the links in the Session column on the User Event Status page. Clicking the Session Date/Time link opens the Event Class Scheduling page**.**

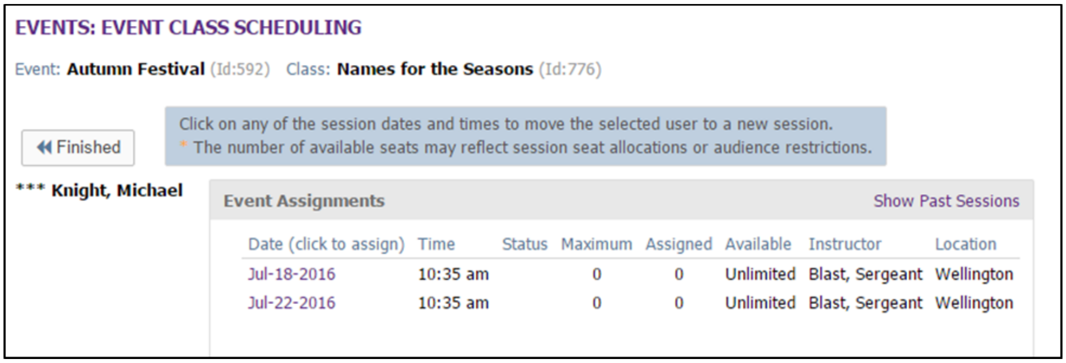


Figure 1-33 - Users & Groups: Event Class Scheduling

Available Event Session Dates are displayed, along with the Session Time and number of Users currently enrolled. Users can be assigned to any session as long as there are available seats in that Session. Click any of the available session date links to move the user to that session. Click the **Finished** button to return to the **User Event Status** page.

1.1.6 Users & Managers: Delete a User or Manager Record

To make an existing user record "Inactive" or "Delete request", select **Users & Groups: Users & Managers**, and click on the User Name link to select the user you wish to edit. The User record will display, defaulted on the Information sub-tab. Click the **Edit** button in the lower left corner.

At the **Status** field (normally the last data field of a record), select the desired **Inactive** or **Delete request** radio button.

Click the **Save** button to activate your change. The Status field will now be highlighted in **Yellow** (to indicate Inactive) or **Pink** (to indicate Request delete).

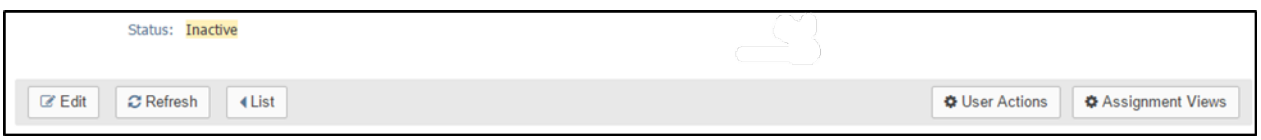


Figure 1-34A – Users & Groups: Inactive User Status

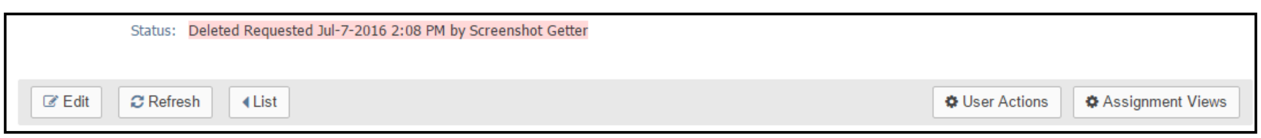


Figure 1-34B – Users & Groups: Request delete User Status

For Request delete records, the Status field shows the requested deletion, the date/time, and who requested it.

Once a user is marked Inactive or Delete request, the user no longer has access to the OnPoint Portal or Content Viewer applications. Should they attempt to login, they will receive a message indicating that their account is Inactive or has been Deleted, and to check with their Support Department for assistance. Click the **List** button to return to the User List.

Notice that the User's name is no longer included in the list of Users. If the list's Filter is changed to show "All" user status conditions, the user will display in the list, highlighted in the appropriate yellow or pink color to alert others as to the status of the User record. The User name will also be excluded from any lists of Available Users when Administrators are making assignments.

Note: User records can only be deleted by a Site Administrator. When you request that a user be deleted, the Administrator reviews the request to ensure there is no need for the user before performing the delete function.

1.1.7 Users & Managers: Management Sub-Tab

Managers with a Performance Manager license (either Reporting Manager or Group Manager) receive an extra Management Sub-Tab when they are created.

To designate which Group or Groups the selected Reporting/Group Manager will have supervisory rights to view through OnPoint's Performance Manager ("OPPM") application, the **Administrative Rights** page will allow for the assignment and unassignment of groups to the Manager. A listing of all available Groups will display in the column on the right and a list of all assigned groups will display on the left. Group assignments are selected by clicking the checkbox next to the desired group(s) from the right-hand column (this allows you to assign more than one Group at a time). For environments with multitudes of available Groups, a **Filter** button is available that can help you narrow the available list. Click the **Assign/Unassign** button to commit the assignments.

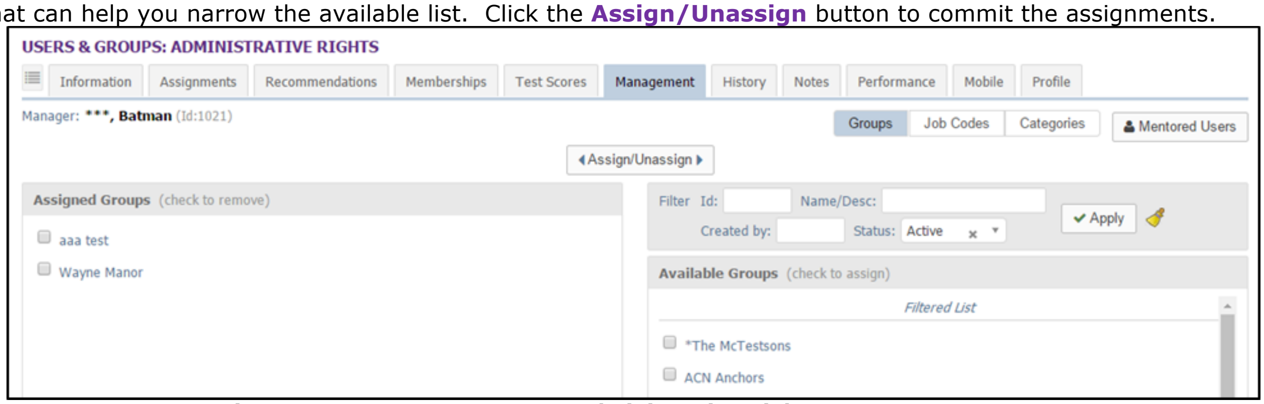


Figure 1-36 – Users & Groups: Administrative Rights Group Management

Note: When the Reporting/Group Manager logs into OnPoint Performance Manager, they will only have viewing and reporting access on those users who are members of these assigned Groups.

1.2 Users & Groups: Groups

The second option under the main **Users & Groups** top-level Menu is **Groups**. This selection displays the **Users & Groups: Groups** List, a listing of all current Group assignments defined in the Course Manager database**.** From this list, you may:

1. Select a Group record from the List to review or edit by clicking on the Group.
2. Enter one or more letters in the Filter Name field to narrow your search.
3. Click the **Add Group** button to create a new Group.
4. Use the **Filter** button to narrow your search for a specific Group.

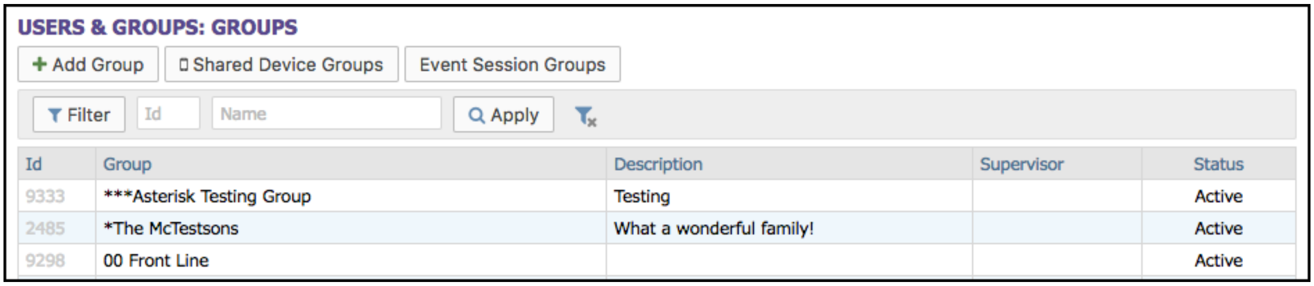


Figure 1-37 – Users & Groups: Groups Table Display

Groups are listed alphabetically by Group Name, or numerically if Group names begin with numerals. The Group list displays the following:

Users & Groups: Groups Table Display	
Element	**Description**
Id Number:	The OnPoint Id record number for the Group. This field is auto-generated.
Group Name:	The name of the Group. Click the Group Name link to view more details about the Group, or to edit the Group record.
Description:	A description of the Group.
Supervisor:	The name of the Supervisor of the Group (optional).
Status:	Designates the Status of the specified group. Groups can be Active, Inactive, or Request Delete. The Group List is automatically set to filter and display by those with a status of "Active". This filter can be changed using the **Filter** button.

What constitutes a group?

There are several common ways that OnPoint's customers use the Groups feature:

1. To represent different physical locations
2. To represent different departments, internal organizations, or external partners/customers
3. To represent different job roles

These common uses are the easiest to create in that you are likely to already have groups like these established in existing HRIS, Payroll, or LDAP/Active Directory systems. Keeping a commonality to groups can be efficient in the initial setup of the OnPoint system.

Remember a few key tips when you are first creating your groups. **First, start with the high level, most common groupings.** You can always add more groups as they become obvious or needed, so keeping your list to a reasonable number will be more manageable.

Second, create groups that you think you'll need to communicate with pretty often, or that are logical from an assignment perspective. For instance, if you have an ongoing need to communicate with all tellers in a particular country, you should create a group like "Tellers – Germany." If this only happens occasionally, you wouldn't need to create a group. Or say you have a regular need to make assignments to all Tellers. In this example, you would just create a group called "Tellers" then you would be able to make the assignments directly to that group.

Many customers create a group for (1) every physical location they have, and (2) every major department they have. Some also create groups for every job role they have. The decision is based on how they envision communicating with their users and how they will make assignments to users. In the OnPoint system, there are typically several ways to accomplish tasks. For example, you may choose to use the Job Code Assignments or Location Assignment designation under the Users - Membership Sub-tab to associate a user with one or more job codes and one physical location, and this will provide you the ability to make direct assignments to all members of a job code or location. **The current system provides more communications capability, assignment capability, and reporting filters at the group level than by location or job code.**

1.2.1 Groups: View a Group Record

The **Users & Groups: Group** record display provides a brief description of all the particulars of an established Group. To view and edit a Group record, select the Group you wish to view from the list of **Users & Groups: Groups** by clicking on the Group and the **Users & Groups: Group** record for that resource will appear**.** The displayed screen shows the Group Information page with the Action Buttons.

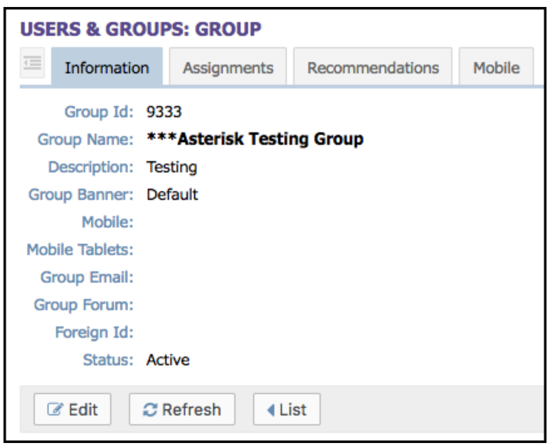


Figure 1-38 – Users & Groups: Group Record

The Users & Groups record has several Submenu tabs covering all of the definitions and parameters for the selected Group, as follows:

A. **Information –** Tab 1 "Group Information" includes fields for Group Id, Name, Description, Supervisor, Group Banner, Mobile, Mobile Tablets, Group Email, Status and up to 5 custom-defined fields.

B. **Assignments –** Tab 2 "Assignments" lists all of the current Assignments for that Group, including Courses, Assessment Sets, Nuggets, Activities, Events Skill Profiles/Curriculums, and Catalog assignments, along with assigned Forums, Mobile UI's & OPUI's, Group Managers, and Users. Most assignment fields may be manually updated at any time by clicking the corresponding **Assign** links.

C. **Recommendations –** Tab 3 "Recommendations" lists all of the current Recommendations for that group, including all of their Courses, Assessment Sets, Nuggets, Activities, Events, and Skill Profile/Curriculum assignments. These recommendation fields may be manually updated at any time by clicking the **Recommend** link, and removed when desired. Recommended items will show who made the recommendation, the date it was made, and also allow reinforcement.

D. **Mobile –** Tab 4 "Mobile" includes fields for creating a playlist, managing blogs or RSS feeds, and managing any of the media files to include audio, video, and image files. Once these are created you can select Generate Mobile Registration Codes to send mobile registration codes to group members.

Action buttons that appear across the lower portion of the Information sub tab include the **Edit** which will allow you to view and edit the data fields for your selected record, the **Refresh** which allows you to refresh the page with recent updates if needed, the **List** option which will return you to the previous listing that you were working from, the **Login Action** button which will provide actions for next login such as change password, show profile, etc., and Forum which allows users to post and have discussions.

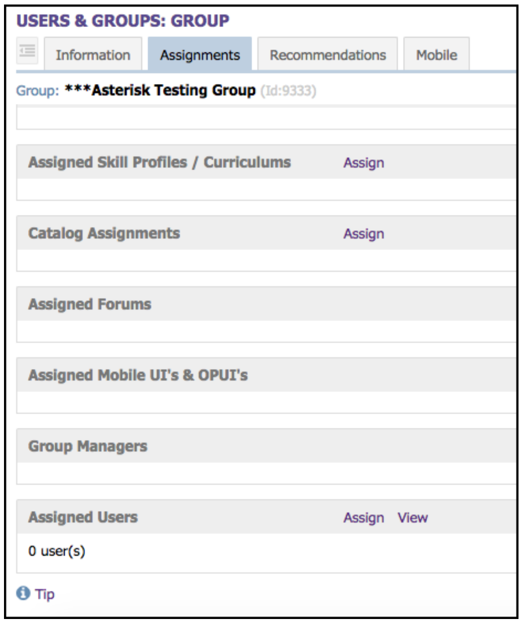


Figure 1-39A – Users & Groups: Group Assignments

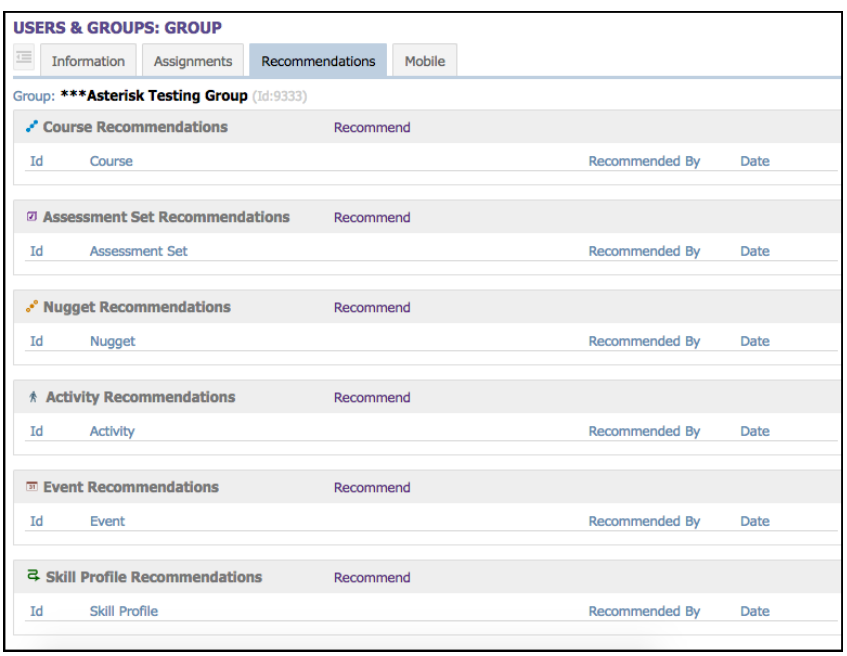


Figure 1-39B – Users & Groups: Group Recommendations

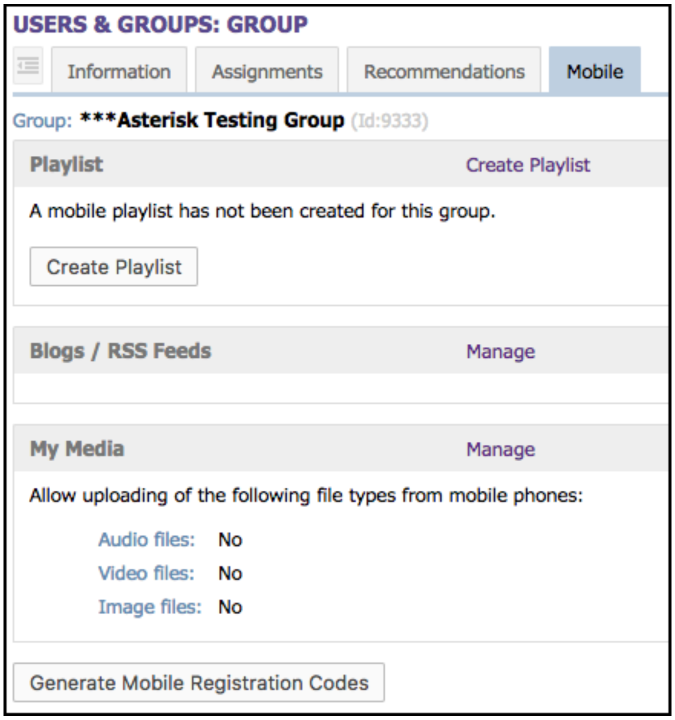


Figure 1-39C – Users & Groups: Group Mobile

Figure 1-39C– Users & Groups: Group Mobile Registration

1.2.2 Groups: Search for a Group

Under **Users & Groups: Groups** is a list of all current Groups in your Course Manager repository. Groups are listed alphabetically by Group Name, or numerically if Groups Names begin with a number. To find a specific group, you may:

1. Scroll through the list until you locate the group record.
2. Enter one or more letters of the Group Name in the Name field to narrow your search.
3. Use the **Filter** button to narrow your search for a specific group.

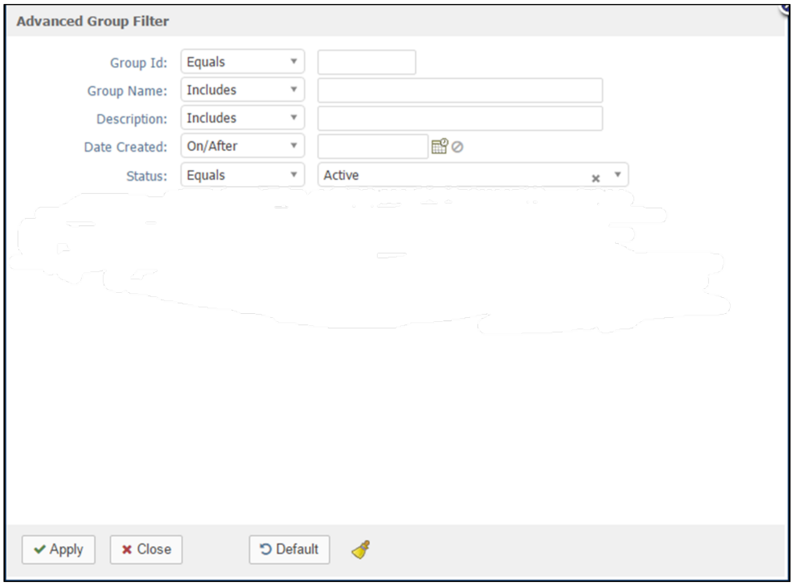
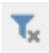


Figure 1-40 – Users & Groups: Group Filter Selection Screen

The Groups: Group Filter allows you to search for a group by any of the following search criteria:

Users & Groups: Group Filter Selection Screen	
Element	**Description**
	Use the drop down menu for additional filter options: • **equals** – filters for a match of a letter or text string. • **begins with** – filters for all groups beginning with the criteria (e.g. type an A and get a list of all groups beginning with A). • **includes** – filters for all groups that include the criteria (e.g. type "Sales" and get all groups that include that word). • **ends with** – filters for all groups ending with the criteria. • **not equal to** – filters out everything matching this entry (e.g. type an A and no groups beginning with A will display). • **less than** – filters all matches less than the criteria. • **greater than** – filters all matches greater than the criteria.
Group Id:	Search by the Id assigned to the group.
Group Name:	Search by the name of the group.
Description:	Search by the description of the group. Use the drop-down menu as explained above, then enter some descriptive data.
Date Created:	Search for all groups created on/after or before specific dates.
Status:	Search by the group's status (All, Active, Inactive, or Delete Requested).

When you are finished entering your selection criteria you can select **Apply** to apply the filters to the group list, select **Use Defaults** to reset the filter to the default setting, which is Active Group Status with Group names that begin with "A" or use the **Close** button to close the filter window.

The  icon will clear all filters and is available on this filter screen or at the top of the list on the **Users & Groups: Groups** page.

1.2.3 Groups: Create a New Group

To create a new Group record, select **Users & Groups: Groups**, then click the **Add Group** button. The **Users & Groups: Group Edit** screen will appear.

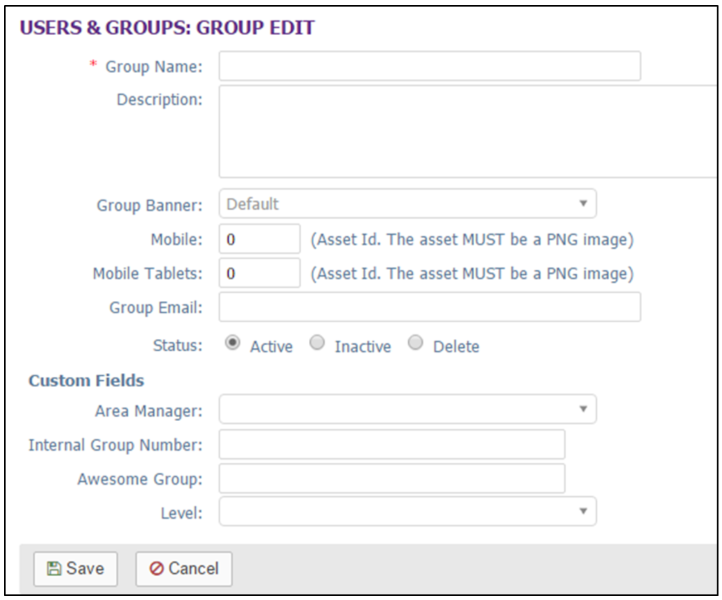


Figure 1-41 – Users & Groups: Group Add Record

Complete the following data fields that are appropriate:

Users & Groups: Group Add Record	
Element	**Description**
Group Name:	Enter the name of the Group. **(Required Field)**
Description:	Enter a description of the Group.
Group Banner:	Select the designated banner for the Group.
Mobile:	Assign an image to the group by entering the asset Id of an image.
Mobile Tablets:	Assign an image to the group (for use on a tablet) by entering the asset Id of an image.
Group Email:	Enter an email address for the group.
Group Forum:	Click the checkbox to auto create a forum for this group.

Group Catalog:	Click the checkbox to auto create a catalog for this group.
Status:	Enter the status of the Group. The default is Active. • **Active** (Group is active) • **Inactive** (Group is not active) • **Request Delete** (Group record is no longer needed)
Custom Fields: (Up to 5)	Up to five custom-defined fields may appear here. The field captions displayed are entered by the Site Administrator. **(Administration tab > Custom Fields submenu)**

At anytime during this edit you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

Note: All Group information fields can be edited at any time with additional or updated info. The **Edit** button is required to update the Group information fields. After entering a new record and saving your entries, click the **Refresh** button to make sure all your new entries are displayed.

Assign a Supervisor for the Group

If you are not using the Organization Chart functionality of the OnPoint Learning System, you will have one additional field you can edit once you have created a new Group record. On the **Users & Groups: Group** page of any record, there is a Supervisor field, which allows you to enter a designated supervisor for the Group. Use the **Assign** link to select a manager name from the list (the list will include all OPCM and OPPM managers). This person will receive notifications triggered by group member actions if the trigger is set up to send the notification, and if you are not utilizing OnPoint's Organizations tree structure to identify a user's direct manager.

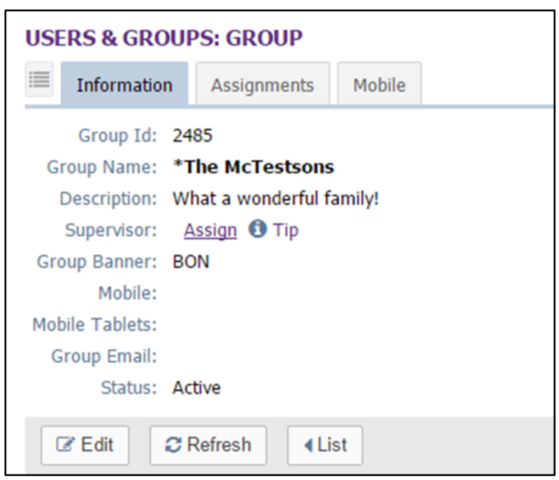


Figure 1-42A – Users & Groups: Groups – Assign Supervisor Link

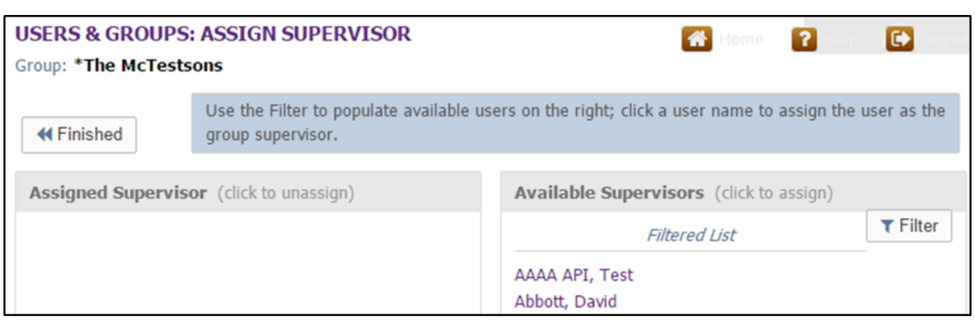


Figure 1-42B – Users & Groups: Groups – Select a Supervisor

Note: For OnPoint customers who are using Organizations, the supervisor field is hidden as it is not needed; the system will instead look to the org chart to determine the user's immediate supervisor.

Tip: The Supervisor function is different from the Reporting Manager designations. There may be multiple managers overseeing a group, but the notifications, when created, will send to one email when "Manager" is selected in the trigger recipient field, so the system will look for that user's primary group to find the designated supervisor.

1.2.3.1 New Group: Information

Once an Administrator has created and saved a new Group record, the **Users & Groups: Group** Information screen will display, including several sub-tabs that define the Group. The default view is the Group Information tab.

Action buttons that appear across the lower portion of the Group Information page include the **Edit** which will allow you to view and edit the data fields for your selected record, the **Refresh** which allows you to refresh the page with recent updates if needed, the **List** option which will return you to the previous listing that you were working from, the Login Action button which allows actions on next login such as change password, show profile, etc., and the **Forum** button which will allow users to submit entries and comment on each other's.

1.2.3.2 New Group: Assignments

Once a new Group record has been defined, Administrators may want to add assignments to the Group manually. Assignments can include Courses, Assessment Sets, Nuggets, Activities, Events, Skill Profiles/Curriculums, Catalog Assignments, Assigned Forums, Assigned Mobile UI's and OPUI's, Group Managers and Assigned Users. Since the newly created group has just been defined, no assignments will be displayed to start. If you do need to make assignments at the Group level, most fields may be manually updated at any time by clicking the corresponding **Assign** links.

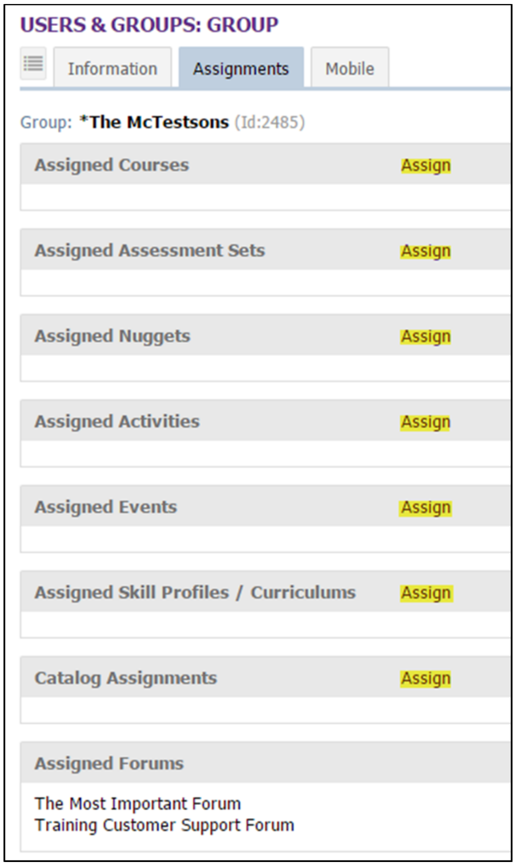


Figure 1-43 – Users & Groups: Group - Assignments tab

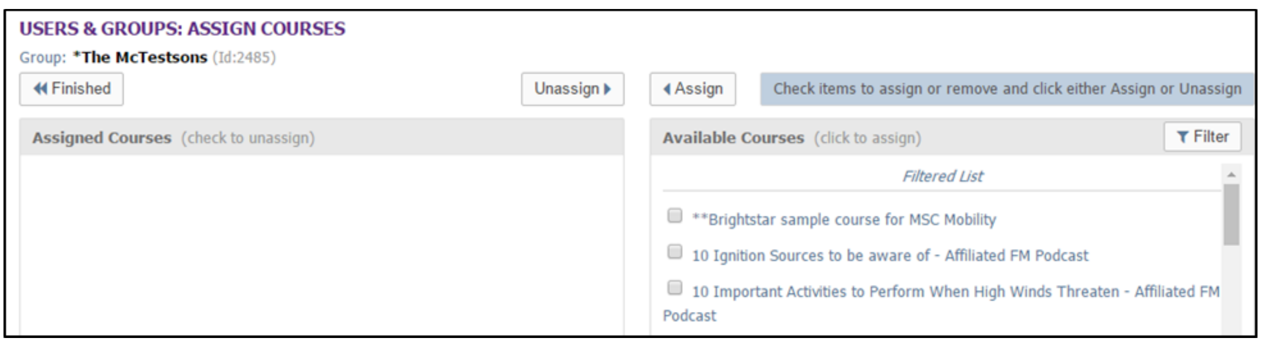


Figure 1-44 – Users & Groups: Group Assignments – Assign Courses

Tip: If your organization has the OnPoint LMS integrated with an internal HRIS or other system that regularly feeds user import detail, those imports may automatically drive user assignments so that they do not need to be made via a group-based association. It may be that you will not need to make manual assignments to groups here under this sub-tab. For example, if a New Hire Orientation Skill Profile is created with 10 courses in it, and that Skill Profile is assigned to a Job Code 63 (New Hires), then all members of that job code will be automatically assigned all ten courses in the Skill Profile. No manual assignments would need to be made here at the Group level.

The Assignments tab displays the assignments for the Group, including:

Users & Groups: Group Assignments	
Element	**Description**
Assigned Courses:	Assign the Courses you want the Group's members to be assigned to take. Click the **Assign** link to add a new Course assignments**.** Course assignments are selected by clicking the checkbox next to the desired course(s) from the right-hand column (it is possible to assign more than one course at a time). For environments with multitudes of available courses, a **Filter** button is available that can help you narrow the available list. Click the **Assign** or **Unassign** button to commit the assignments. Click the **Finished** button to exit and return to the Assignments sub-tab.
Assigned Assessment Sets:	Assign the standalone Assessment Sets you want the Group's members to be assigned to take. Follow the instructions as detailed above.
Assigned Nuggets:	Assign the Nuggets you want the Group's members to be assigned to take. Follow the instructions as detailed above.
Assigned Activities:	Assign the Activities you want the Group's members to be assigned to take. Follow the instructions as detailed above.
Assigned Events:	Assign the Events you want the Group's members to be assigned to take. Click the **Assign** link to add a new Event assignment. Event assignments are selected by clicking the desired event from the right-hand column. This will automatically assign it and move it to the left-hand column. To remove an event, simply select the event from the left-hand column and it will automatically return to the Available Events list on the right-hand side.
Assigned Skill Profiles/Curriculums:	Assign the Skill Profiles you want the Group's members to be assigned to take. Follow the instructions as detailed above in Assigned Courses.
Catalog Assignments:	Assign the Catalogs you want the Group's members to be assigned to take. Follow the instructions as detailed above in Assigned Courses.
Assigned Forums:	Auto populated to show the admin any assigned forums.
Assigned Mobile UI's & OPUI's:	Auto populated to show the admin any assigned Mobile UI's or OPUI's.
Group Managers:	Auto populated to show the admin any assigned group managers.
Assigned Users:	Assign any Users you want as members of the Group. Follow the instructions as detailed above in Assigned Courses.

Note: Group assignment fields can be edited at any time with additional or updated information. No **Edit** button is required to update the assignment fields of a Group record.

Using Filters When Assigning Users to Groups

When making the Group's User assignments, use the filters to help you quickly find the users you need. The system defaults to a filter selection "**A**", on the Available Users (right) column. You can change the letter you wish to filter on by using the input fields within the filter popup window. For larger numbers of users, clearing the filters is not recommended. As an example, the below shows the right column filtered for last names beginning with the letter "**A**".

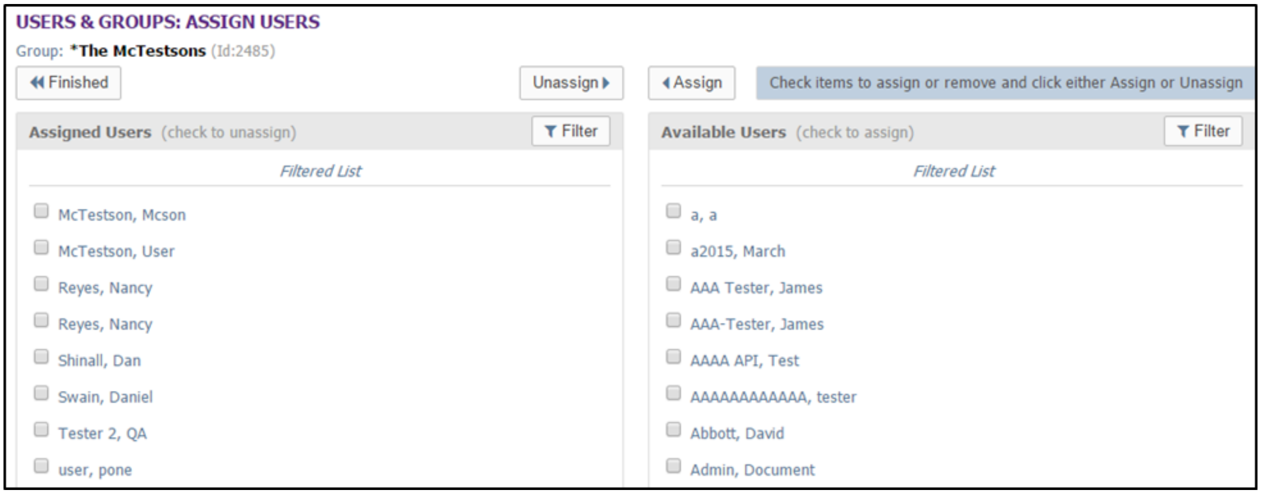


Figure 1-45 – Users & Groups: Assign Users to Group

1.2.4 Groups: Edit a Group Record

To Edit an existing Group record, select the Group you wish to edit from the list of **Users & Groups: Groups** by clicking on the Group. The Group record will display, defaulted on the Group Information sub-tab page.

Action buttons that appear across the lower portion of the Group Information page include the **Edit** which will allow you to view and edit the data fields for your selected record, the **Refresh** which allows you to refresh the page with recent updates if needed, the **List** option which will return you to the previous listing that you were working from, the Login Action button which allows actions on next login such as change password, show profile, etc., and the **Forum** button which will allow users to submit entries and comment on each other's.

Click the **Edit** button to make any updates to the Group record. At anytime during this edit you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

Note: All Group information fields can be edited at any time with additional or updated information. The **Edit** button is required to update the Group information fields.

Tip: After editing a record and saving your updates, click the **Refresh** button to make sure our changes are displayed.

1.2.5 Groups: Delete a Group Record

To make an existing Group record "Inactive" or delete a Group record, select **Users & Groups: Groups**, and select the Group you wish to edit. When the Group record is displayed, click the **Edit** button. At the **Status** field, select **Inactive** or **Request Delete**. Click the **Save** button to activate your change.

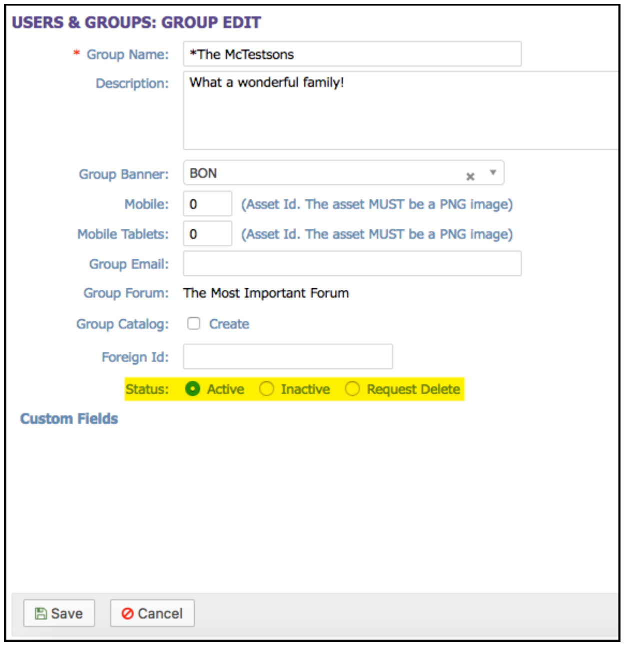


Figure 1-46 – Users & Groups: Inactive Group Status

The Status field will now be highlighted in **Yellow** (indicating Inactive) or **Pink** (indicating Request delete) in the Group Record.

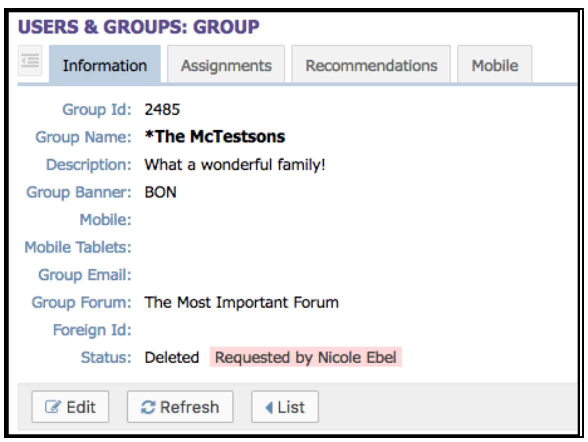


Figure 1-47 – Users & Groups: Delete Group Status

For Request delete status changes, the record will show the requested deletion, the date/time, and who requested it. Click the **List** button to return to the Group List.

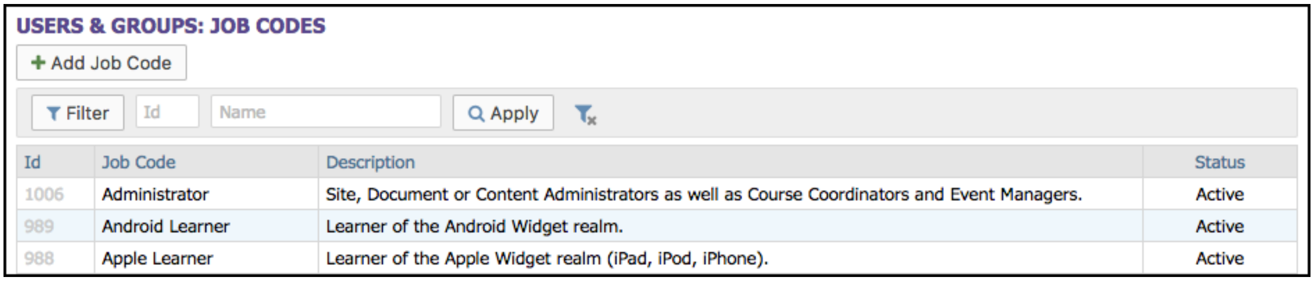
Notice that the Group's name is no longer included in the list of Groups. If the list's Filter is changed to show "All" group status conditions, the group will display in the list, highlighted in the appropriate yellow or pink color to alert others as to the status of the group record. The Group name will also be excluded from any lists of Available Groups when Administrators are making assignments.

Note: Deletion tasks can only be performed by a Site or Root Administrator. When an item's status is changed to "Request delete", an Administrator reviews the request to ensure there is no need for it before performing the delete function (Administration tab > Deletion Tasks option.)

1.3 Users & Groups: Job Codes

The third option under the main **Users & Groups** top-level Menu is **Job Codes**. This selection displays the **Users & Groups: Job Codes** List, a listing of all current Job Code assignments defined in the Course Manager database. From this list, you may:

1. Select a Job Code record from the List to review or edit
2. Enter one or more letters or numbers into the Filter Name field as a quick filter option
3. Use the **Filter** button for more search options to look for a specific Job Code
4. Click the **Add Job Code** button to create a new Job Code



Id	Job Code	Description	Status
1006	Administrator	Site, Document or Content Administrators as well as Course Coordinators and Event Managers.	Active
989	Android Learner	Learner of the Android Widget realm.	Active
988	Apple Learner	Learner of the Apple Widget realm (iPad, iPod, iPhone).	Active

Figure 1-48 – Users & Groups: Job Codes- Job Codes Table

Job Codes are listed alphabetically by Job Code Name, or numerically if Job Code names begin with numerals. The Job Code list displays the following:

Users & Groups: Job Code Table Display	
Element	**Description**
Id Number:	The OnPoint Id record number for the Job Code. This field is auto-generated by the System.
Job Code Name:	The name of the Job Code.
Description:	A description of the Job Code.
Status:	Designates the Status of the specified Job Code. Job Codes can be Active, Inactive, or Marked for deletion. The Job Code List is automatically set to filter and display by those with a status of "Active". This filter can be changed using the **Filter** button.

How are Job Codes useful in the OnPoint LMS?
Job Codes are a variation on the Group function in the OnPoint LMS, and provide an additional or alternative way to work with members of a defined classification of users/learners. Typically, Job Codes represent the type of job or business function being performed. Your HR department may have existing/established Job Codes in use in their payroll or other HRIS systems, and OnPoint recommends utilizing the same or similar code be used within the LMS. Job Codes in the LMS can be used to:

A. Make assignments more efficiently (it is faster to assign something to all users/learners of a specific Job Code than individually)
B. Send automated notifications to members of a specific Job Code
C. Create specific reports at a Job Code level

Job Codes share the same database table as Groups in the OnPoint LMS platform, and are similar to Groups in that one or more Job Code designations can be made to a user/learner in the OnPoint system, and one can be labeled a "primary". Though individuals are normally a member of a number of different Groups, typically they will have just one Job Code; an exception occurs in the case of an employee who works in multiple positions – in which case they may have several Job Codes. A "primary" Job Code designation would be used to designate the primary employee function, so that automated assignments of Skill Profiles would be made based on that primary Job Code rather than on any secondary job responsibility the user may have.

The key reason to establish Job Codes in the LMS is to facilitate the automatic assignment of unique Skill Profiles developed for specific Job Codes. Let's work with Bank Tellers, for example. If you regularly have new tellers joining your financial institution, it is likely that they will all need to take a prescribed training curriculum when they are first hired. Let's say you have 15 assignments you'd like all new tellers to complete (maybe 2 online courses, 3 ILT Events, 3 Assessment Sets, 4 Nuggets, and 3 Activities). Rather than trying to manually assign all 15 assignments to each individual hired, you could create a Skill Profile called "New Hire – Tellers" and assign all 15 assignments to that profile. Then, as each new teller is hired, they are imported into the OnPoint system with a designated Job Code (e.g. Teller-01). Upon import, the LMS could auto-assign the Skill Profile New Hire – Tellers to that user, ensuring that when they first log in to the Learning Center, they will already have all of the appropriate assignments awaiting them.

Assignments of Skill Profiles to Job Codes can be made directly (manually) at the Job Code level, or an automated scenario (as described above) can be set up to happen during regular user import feeds for integrated system implementations. In the case of a user having multiple Job Codes, the system will make the automatic skill profile assignment(s) to the users "primary" Job Code.

In the OnPoint system, they are typically several ways to accomplish tasks. For example, you may choose to also have a Group called Tellers in the LMS to facilitate communications with all Tellers. Assignments can be made directly at the group level as well. Since the Job Codes and Groups share the same database table, automated notifications and report filtering can be accomplished at the Job Code level as well as the Group level.

1.3.1 Job Codes: View a Job Code

The **Users & Groups: Job Codes** record display provides a brief description of all the particulars of an established Job Code. To view and edit a Job Code record, select the Job Code you wish to view from the list of **Users & Groups: Job Codes** by clicking on the Job Code and the **Users & Groups: Job Code** record for that resource will appear. The displayed screen shows the Job Code Information page along with Action Buttons.

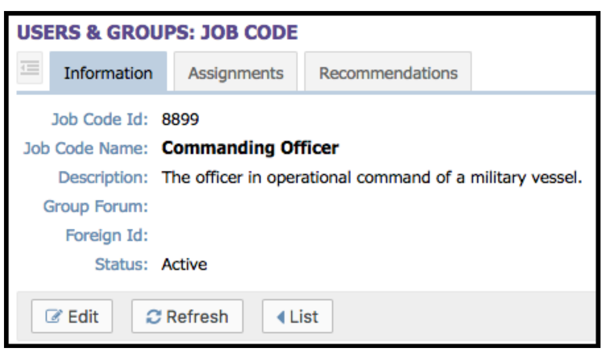


Figure 1-49 – Users & Groups: Job Codes- Job Code Record

The Job Code record has two Submenu tabs covering all of the definitions and parameters for the selected Job Code, as follows:

A. **Job Code Information -** Tab 1 "Job Code Information" includes editable fields for Job Code Id, Name, Description and the current Status.

B. **Assignments -** Tab 2 "Assignments" lists all of the current Assignments for that Job Code, including Courses, Assessment Sets, Nuggets, Activities, Events, Skill Profiles/Curriculums, Forums, Mobile UI's and OPUI's assignments, Group Managers, along with assigned Users. Many of these assignment fields may be manually updated at any time by clicking the corresponding **Assign** links.

C. **Recommendations** – Tab 3 "Recommendations" lists all of the current Recommendations for that Job Code, including all of their Courses, Assessment Sets, Nuggets, Activities, Events, and Skill Profile/Curriculum assignments. These recommendation fields may be manually updated at any time by clicking the **Recommend** link, and removed when desired. Recommended items will show who made the recommendation, the date it was made, and also allow reinforcement.

Action buttons that appear across the lower portion of the Job Code Information page include the **Edit** which will allow you to view and edit the data fields for your selected record, the **Refresh** which allows you to refresh the page with recent updates if needed, the **List** option which will return you to the previous listing that you were working from, and the Login Action button which allows you to create action on next login such as change password, show profile, etc.

1.3.2 Job Codes: Search for a Job Code

Under **Users & Groups: Job Codes** is a list of all current Job Codes in your Course Manager repository. To find a specific job code, you may:

1. Scroll through the list until you locate the job code record
2. Enter one or more letters of the Job Code Name in the Name field to narrow your search
3. Use the **Filter** button to narrow your search for a specific job code

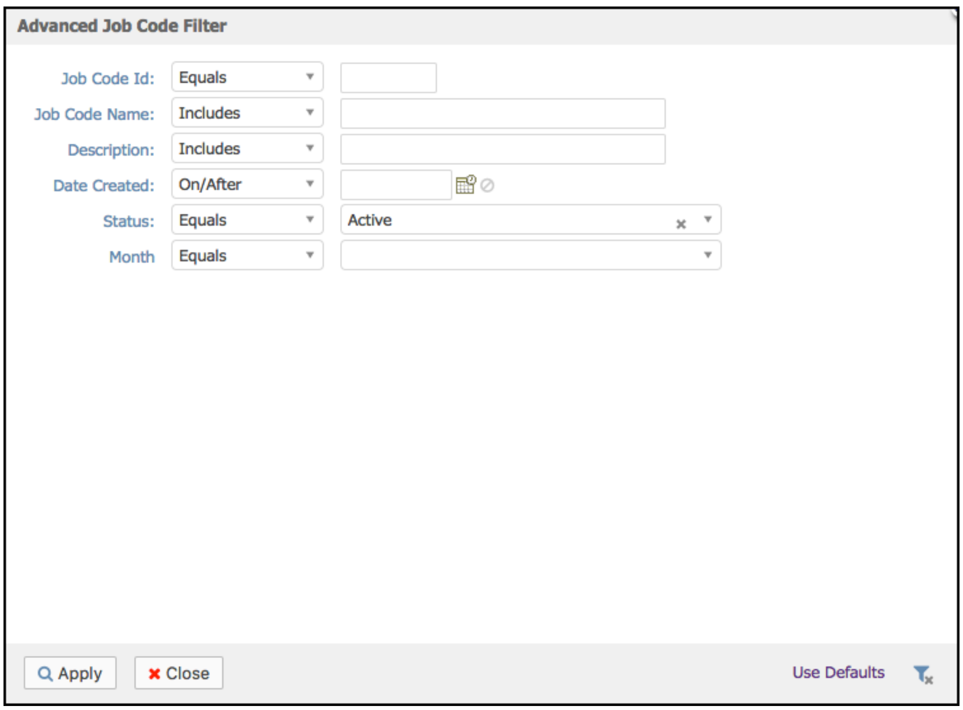


Figure 1-50 – Users & Groups: Job Code Filter Selection Screen

The Job Code Filter allows you to search for a job code by any of the following search criteria:

Users & Groups: Job Code Filter Selection Screen	
Element	**Description**
	Use the drop down menu for additional filter options: • **equals** – filters for a match of a letter or text string. • **begins with** – filters for all job codes beginning with the criteria (e.g. type an A and get a list of all job codes beginning with A). • **includes** – filters for all job codes that include the criteria (e.g. type "Sales Rep" and get all job codes that include that word). • **ends with** – filters for all job codes ending with the criteria. • **not equal to** – filters out everything matching this entry (e.g. type an A and no job codes beginning with A will display). • **less than** – filters all matches less than the criteria. • **greater than** – filters all matches greater than the criteria.
Job Code Id:	The OnPoint Id record number for the Job Code. This field is auto-generated by the system.
Job Code Name:	Search by the name of the job code.
Description:	Search by the description of the job code. Use the drop-down menu as described above, then enter some descriptive data.
Date Created:	Search for any job code created on /after or before a specific date.
Group Status:	Search by the job code's status (Active, Inactive, or Delete requested).

When you are finished entering your selection criteria you can select **Apply** to apply the filters to the group list, select **Default** to reset the filter to the default setting, which is Active Group Status with Group names that begin with "A" or use the **Close** link to close the filter window.

The  icon will clear all filters and is available on this filter screen or at the top of the list on the **Users & Groups: Groups** page.

1.3.3 Job Codes: Create a New Job Code

To create a new Job Code record, select **Users & Groups: Job Codes**, then click the **Add** button. The **Users & Groups: Job Code Edit** screen will appear.

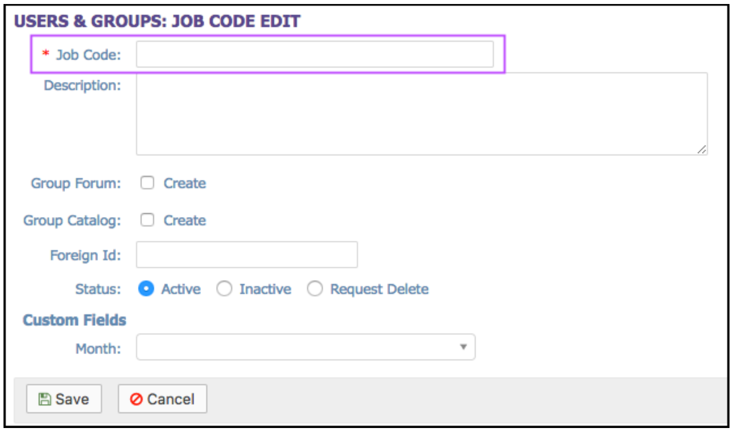


Figure 1-51 – Users & Groups: Job Code Add Record

Complete the following data fields that are appropriate:

Users & Groups: Group Add Record	
Element	**Description**
Job Code:	Enter the name of the Job Code. **(Required Field)**
Description:	Enter a description of the Job Code.
Group Forum:	Click the checkbox to auto create a forum for this group.
Group Catalog:	Click the checkbox to auto create a catalog for this group.
Foreign Id:	** Optional Id used to tie a user to another system of record.
Status:	Enter the status of the Job Code. The default is Active. • **Active** (Job Code is active) • **Inactive** (Job Code is not active) • **Request Delete** (Job Code record is no longer needed)

At anytime during this edit you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

Note: All Job Code information fields can be edited at any time with additional or updated info. The **Edit** button is required to update the Job Code information fields. After entering a new record and saving your entries, click the **Refresh** button to make sure all your new entries are displayed.

1.3.3.1 New Job Code: Job Code Information

Once an Administrator has created and saved a new Job Code record, the **Users & Groups: Job Code** screen will display, including several sub-tabs that define the Job Code. The default view is the Job Code Information tab.

Action buttons that appear across the lower portion of the Job Code Information page include the **Edit** which will allow you to view and edit the data fields for your selected record, the **Refresh** which allows you to refresh the page with recent updates if needed, the **List** option which will return you to the previous listing that you were working from, and the Login Action button which allows you to create action on next login such as change password, show profile, etc.

1.3.3.2 New Job Code: Assignments

Once a new Job Code record has been created and defined, Administrators may want to add assignments to the Job Code manually. Assignments can include Courses, Assessment Sets, Nuggets, Activities, Events, Skill Profiles/Curriculums, Forums, Mobile UI's & OPUI's, Group Managers and Assigned Users. Since the newly created job code has just been defined, no assignments will be displayed initially.

	Tip: If your organization has the OnPoint LMS integrated with an internal HRIS or other system that regularly feeds user import detail, those imports may automatically drive user assignments so that they do not need to be made via a group-based association. It may be that you will not need to make manual assignments to groups here under this sub-tab. For example, if a New Hire Orientation Skill Profile is created with 10 courses in it, and that Skill Profile is assigned to a Job Code 63 (New Hires), then all members of that job code will be automatically assigned all ten courses in the Skill Profile. No manual assignments would need to be made here at the Group level.

If you do need to make assignments at the Job Code level, click the corresponding **Assign** link.

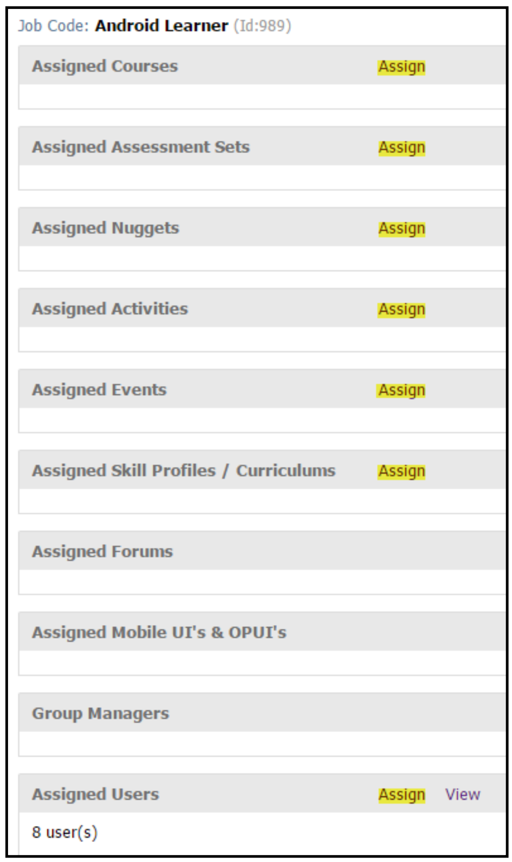


Figure 1-52 – Users & Groups: Job Code - Assignments tab

The Assignment tab displays the assignments for the Job Code, including:

Users & Groups: Group Assignments	
Element	**Description**
Assigned Courses:	Assign the Courses you want any user with a specific Job Code to be assigned to take. Click the **Assign** link to add a new Course assignments**.** Course assignments are selected by clicking the checkbox next to the desired course(s) from the right-hand column (it is possible to assign more than one course at a time). For environments with multitudes of available courses, a **Filter** button is available that can help you narrow the available list. Click the **Assign** or **Unassign** button to commit the assignments. Click the **Finished** button to exit and return to the Assignments sub-tab.
Assigned Assessment Sets:	Assign the standalone Assessment Sets. Follow the instructions as detailed above.
Assigned Nuggets:	Assign any Nuggets. Follow the instructions as detailed above.
Assigned Activities:	Assign any Activities. Follow the instructions as detailed above.
Assigned Events:	Assign any Events. Click the **Assign** link to add a new Event assignment. Event assignments are selected by clicking the desired event from the right-hand column. This will automatically assign it and move it to the left-hand column. To remove an event, simply select the event from the left-hand column and it will automatically return to the Available Events list on the right-hand side.
Assigned Skill Profiles/Curriculums:	Assign any Skill Profiles. Follow the instructions as detailed above in Assigned Courses.
Catalog Assignments:	Assign any Catalogs. Follow the instructions as detailed above in Assigned Courses.
Assigned Forums:	Auto populated to show the admin any assigned forums.
Assigned Mobile UI's & OPUI's:	Auto populated to show the admin any assigned Mobile UI's or OPUI's.
Group Managers:	Auto populated to show the admin any assigned group managers.
Assigned Users:	Assign any users the Job Code. Follow the instructions as detailed above in Assigned Courses.

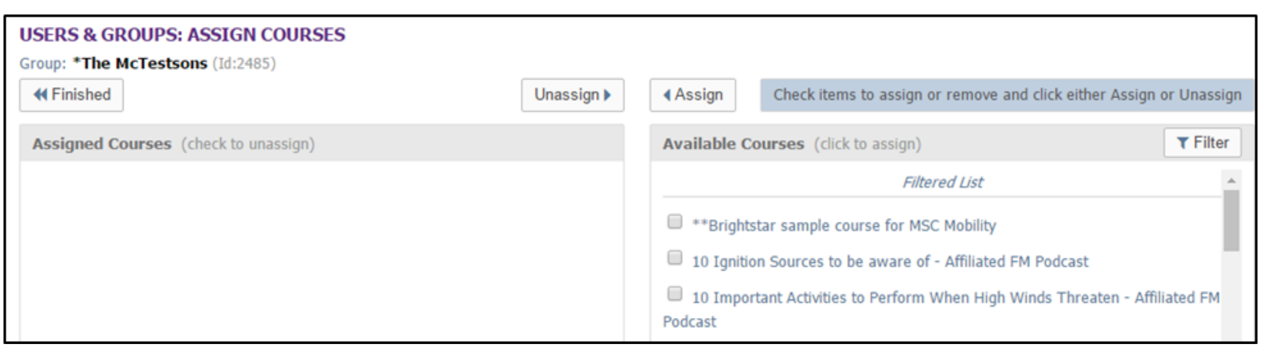


Figure 1-53 – Users & Groups: Job Codes- Assign Course(s) to Job Code

Using Filters When Assigning Users to Job Codes

When making the Job Code's User assignments, use the filters to help you quickly find the users you need. The system defaults to a filter selection "A", on the Available Users (right) column. You can change the letter you wish to filter on by using the input fields within the filter pop-up window. For a larger number of users, clearing the filters is not recommended.

1.3.4 Job Codes: Edit a Job Code Record

To Edit an existing Job Code record, select the Job Code you wish to edit from the list of **Users & Groups: Job Codes** by clicking on the Job Code. The Job Code record will display, defaulted on the Job Code Information sub-tab page.

Action buttons that appear across the lower portion of the Job Code Information page include the **Edit** which will allow you to view and edit the data fields for your selected record, the **Refresh** which allows you to refresh the page with recent updates if needed, and the **List** option which will return you to the previous listing that you were working from.

Click the **Edit** button to make any updates to the Job Code record.

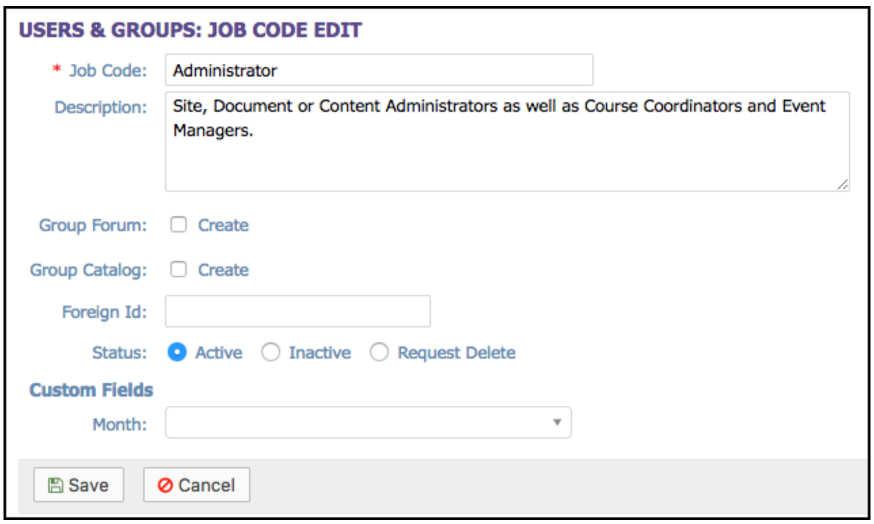


Figure 1-54 – Users & Groups: Job Codes- Job Code Edit page

At anytime during this edit you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

	Tip: After editing a record and saving your updates, click the **Refresh** button to make sure all your changes are displayed.

	Note: All Job Code information fields can be edited at any time with additional or updated information. The **Edit** button is required to update the Job Code information fields.

1.3.5 Job Codes: Delete a Job Code Record

To make an existing Job Code record "Inactive" or "Request delete" a Job Code record, select **Users & Groups: Job Codes**, and select the Job Code you wish to edit. When the Job Code record is displayed, click the **Edit** button. At the **Status** field, select **Inactive** or **Request delete**. Click the **Save** button to activate your change.

The Status field will now be highlighted in **Yellow** (Inactive) or **Pink** (Request delete) in the Job Code.

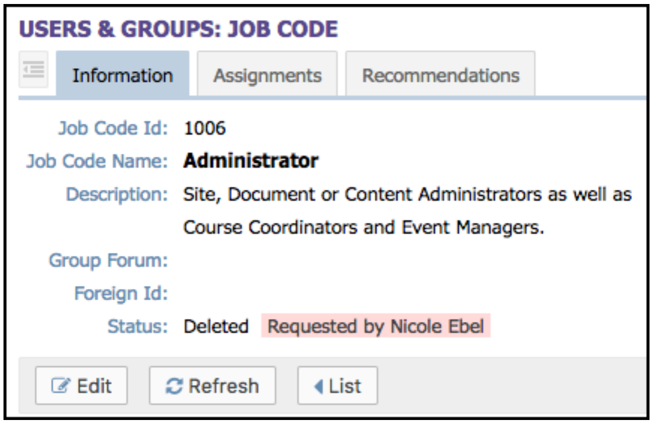


Figure 1-55 – Users & groups: Job Codes- Delete Job Code Status

For Request delete status changes, the record will show the requested deletion, the date/time, and who requested it.

Click the **List** button to return to the Job Code List.

Notice that the Job Code's name is no longer included in the list of Job Codes. To change the list's Filter to show all job code status conditions, select the "x" to remove the current filter and click **Apply**. The previously deleted Job Code will now display in the list, highlighted in the appropriate yellow or pink color to alert others as to the status of the group record. The Job Code name will also be excluded from any lists of Available Job Codes when Administrators are making assignments.

Note: Deletion tasks can only be performed by a Site or Root Administrator. When an item's status is changed to "Request delete", an Administrator reviews the request to ensure there is no need for it before performing the delete function (Administration tab > Deletion Tasks option.)

1.4 Users & Groups: Locations

When you select locations from the **Users & Groups** menu, the **Locations** list will display, showing a list of all current Organization Charts defined in the Course Manager database**.** From this list, you may:

Users & Groups: Locations	
Element:	**Description**
Expand:	Expands the tree to show all sub levels of the locations.
Collapse:	Collapses the tree to show all main levels of the locations.
Add-Base-Location:	Adds a location to the Root Menu.

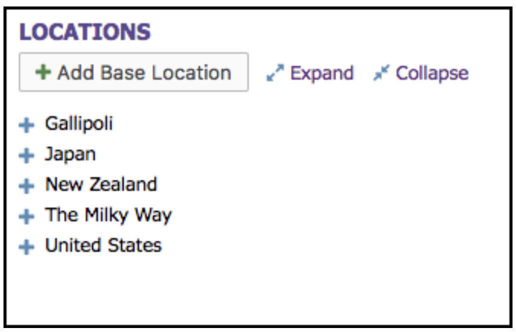


Figure 1-56 – Users & Groups: Locations

Using Locations to assign Content.

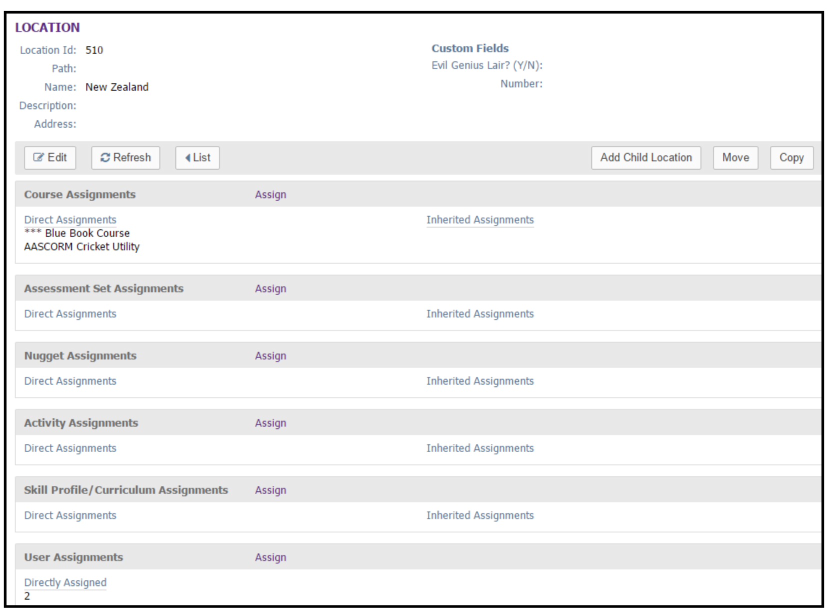


Figure 1-57 – Users & Groups: Locations/Content

The lower half of the **Location** screen displays the assignments for the Location, including:

Users & Groups: Location Assignments	
Element	**Description**
Course Assignments:	Click the Assign link to add new Course assignments to any user with the specified Job Code. Choose from a list of available courses on the right, or use the **Filter** button to narrow the list of choices. Course assignments are selected by clicking the checkbox next to the desired course(s) from the right-hand column (it is possible to assign more than one course at a time). Click the **Assign** or **Unassign** button to commit the assignments. Click the **Finished** button to exit and return to the Assignments sub-tab.
Assessments Sets Assignments:	Assign any stand-alone Assessments. Follow the instructions as detailed above.
Nuggets Assignments:	Assign any Nuggets. Follow the instructions as detailed above.
Activity Assignments:	Assign any Activities. Follow the instructions as detailed above.
Skill Profiles/Curriculum Assignments:	Assign any Skill Profiles/Curriculum. Follow the instructions as detailed above.
User Assignments:	Assign any Users to the Job Code classification. Follow the instructions as detailed above.

1.5 Users & Groups: Organization Chart

When you select Organization Chart from the **Users & Groups** menu, the **Organization Chart** list will display, showing a list of all current Organization Charts defined in the Course Manager database.

From this list, you may:

Users & Groups: Organization Chart	
Element:	**Description**
Expand:	Expands the tree to show all sub levels of the Organization Chart.
Collapse:	Collapses the tree to show all main levels of the Organization Chart.
Add-Base-Location:	Adds a location to the Root Menu. Fields include Org Chart Name, and Description.

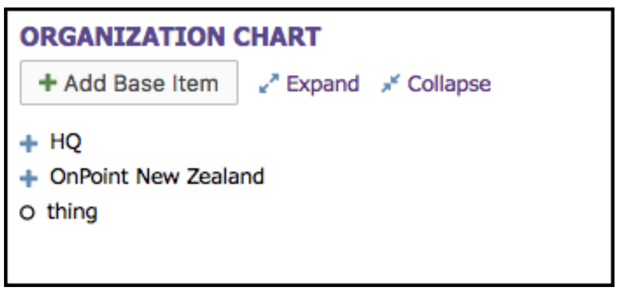


Figure 1-58 – Users & Groups-Organizational Charts

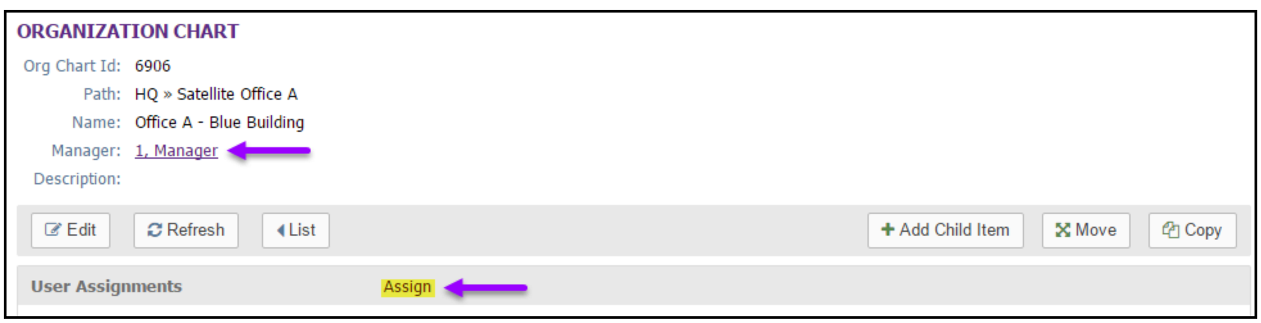


Figure 1-59 – Users & Groups-Organizational Charts

Selecting the Manager field assigns a manager to the Organization chart.

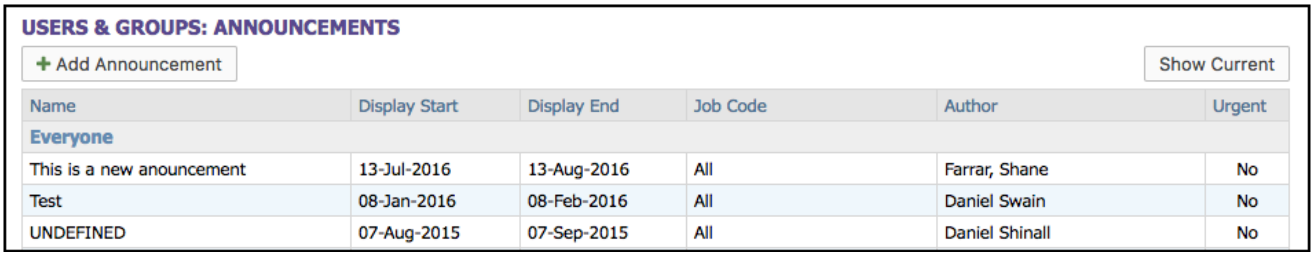
Selecting the **Assign** link next to the user assignments field allows for users to be assigned to this Organization chart.

1.6 Users & Groups: Announcements

The sixth submenu option under the primary Users & Groups top-level menu is Announcements. Announcements are messages that can be defined within OnPoint to be displayed to certain Groups of users when they login to the OnPoint Portal. Announcements appear in a "portlet" on the main Portal page; when a user clicks on an Announcement link, a pop-up window opens displaying the announcement message and the name of its author.

When you select Announcements from the Users & Groups menu, the **Users & Groups: Announcements** list will display, showing a list of all current Announcements defined in the Course Manager database. From this list, you may:

1. Select an Announcement record from the list to review or edit
2. Click the **Add Announcement** button to create a new Announcement



USERS & GROUPS: ANNOUNCEMENTS

+ Add Announcement | Show Current

Name	Display Start	Display End	Job Code	Author	Urgent
Everyone					
This is a new anouncement	13-Jul-2016	13-Aug-2016	All	Farrar, Shane	No
Test	08-Jan-2016	08-Feb-2016	All	Daniel Swain	No
UNDEFINED	07-Aug-2015	07-Sep-2015	All	Daniel Shinall	No

Figure 1-60 – Users & Groups: Announcements

Announcements are listed alphabetically by Announcement Name and organized by Group designation. The Announcement list displays the following:

Users & Groups: Announcements	
Element	**Description**
Name:	Name of the Announcement.
Display Start:	The date and time the Announcement is to begin being displayed to the users.
Display End:	The date and time the Announcement should finish displaying to the users.
Job Code:	Displays which job codes are associated to the Announcement
Author:	Name of the Announcement's author. The name will appear on the announcements viewed by the user.
Urgent:	Yes/No

1.6.1 Announcements: View an Announcement Record

The **Users & Groups: Announcements** record is a detailed description of all the particulars of an Announcement. To view and edit an Announcement record, select the Announcement you wish to view from the list of **Users & Groups: Announcements** and the **Users & Groups: Announcements** record for that resource will appear. The displayed screen shows the Announcement detail as follows:

1. **Announcement Information** begins at the top of the screen including fields for Display Start and End times, Group designation, Job Code, Name/Title (**Required Field**), Announcement text, Author, Urgent, and Show in OPCM. Simply edit the Announcement information as necessary, and click the **Save** button.

[See **Announcements: Edit an Announcement Record** in the next section for more detailed help.]

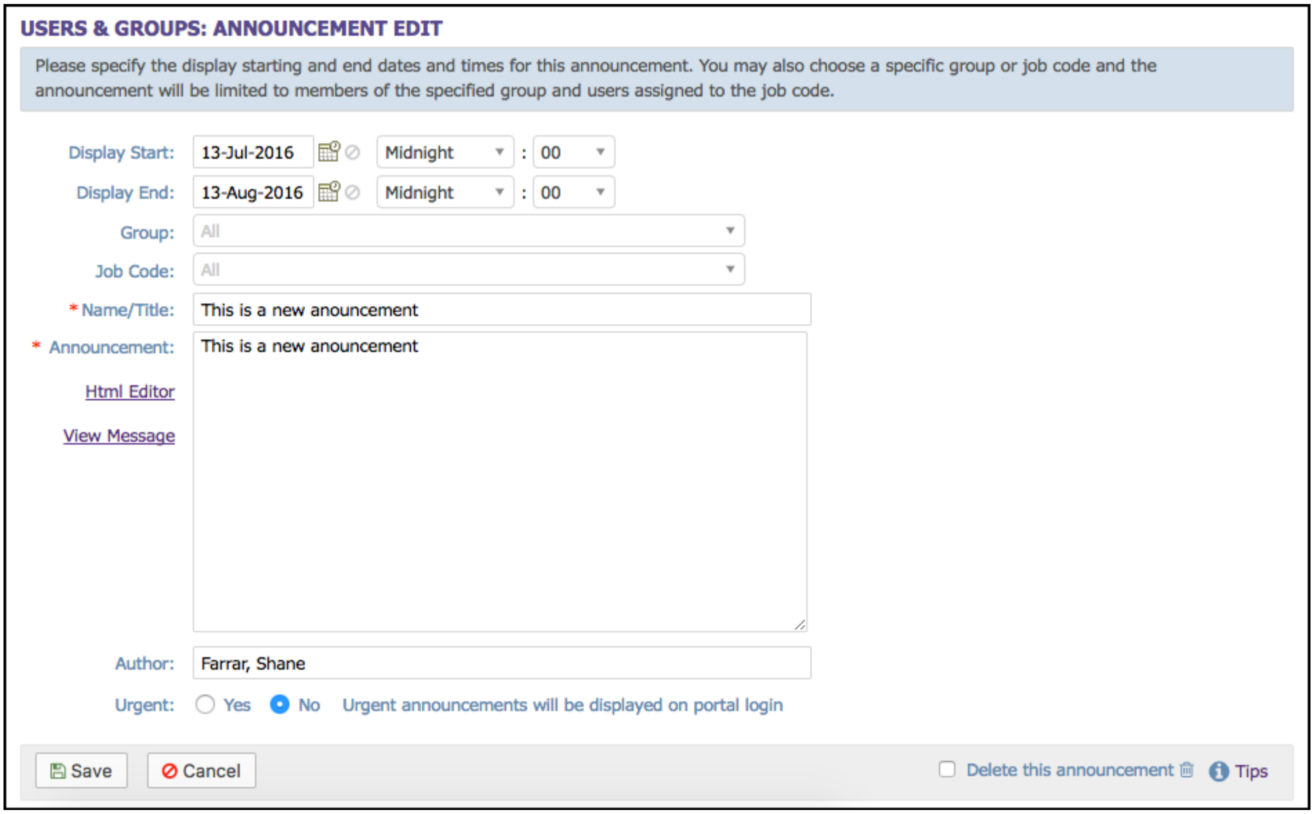


Figure 1-61 – Users & Groups: Announcement Record

1.6.2 Announcements: Create a New Announcement

To create a new Announcement record, click the **Add Announcement** button at the top of the list of **Users & Groups: Announcements**; a new Announcement record screen will appear.

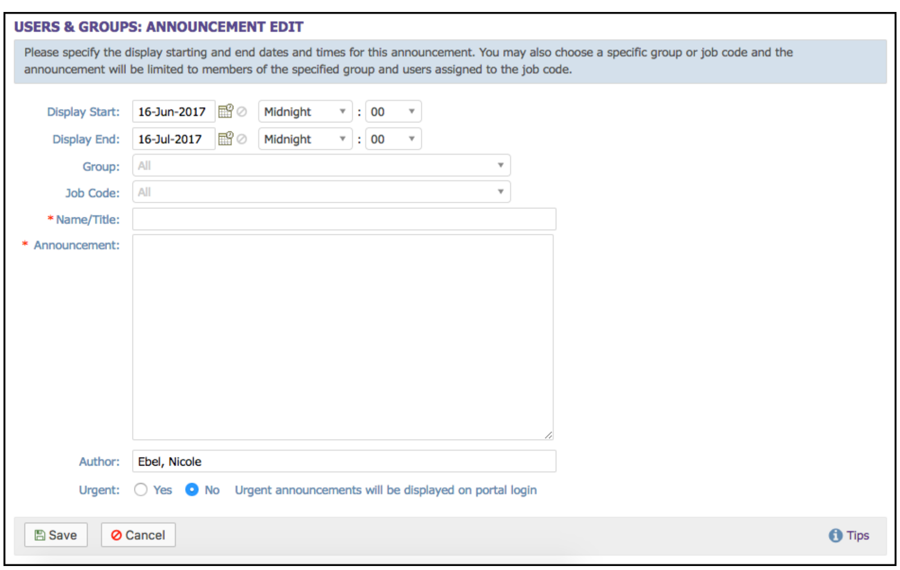


Figure 1-62 – Users & Groups: Add New Announcement Record

Enter the following data fields:

Users & Groups: Add New Announcement Record	
Element	**Description**
Display Start:	Enter the date the Announcement should begin displaying to the users.
Display End:	Enter the date the Announcement should finish displaying to the users.
Group:	Select the Group designation for the Announcement. Choose the Group from the drop down list of choices. All members of that Group will see the Announcement in the Portal. You may also choose the default setting **All** to allow the Announcement to be seen by all users, regardless of their group association.
Job Code:	Drop down menu to associate a job code to the announcement. You may also choose the default setting **All** to allow the Announcement to be seen by all users, regardless of their job code.
Name/Title:	Enter the Name or Title of the Announcement. (**Required Field**)
Announcement:	Enter the actual text of the Announcement itself.
Author:	Enter the name of the Author of the Announcement. This name will appear at the end of the Announcement text in the Portal pop-up window.
Urgent:	Yes or No

At anytime during this edit you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

Note: All Announcement information fields can be edited at any time with additional or updated information.

1.6.3 Announcements: Edit an Announcement Record

To edit an existing Announcement record, select the Announcement you wish to edit from the list of **Users & Groups: Announcements**. At anytime during this edit you may click **Save** to save any changes that have been made or **Cancel** to cancel the action and exit the page without making any changes.

1.6.4 Announcements: Delete an Announcement Record

To delete an existing Announcement record, select **Users & Groups: Announcements**, then select the Announcement you wish to delete from the list by clicking on the Announcement.

From the **Users & Groups: Announcement Edit** screen, select the **Delete this announcement** checkbox in the bottom right corner. Click the **Save** button to activate your change.

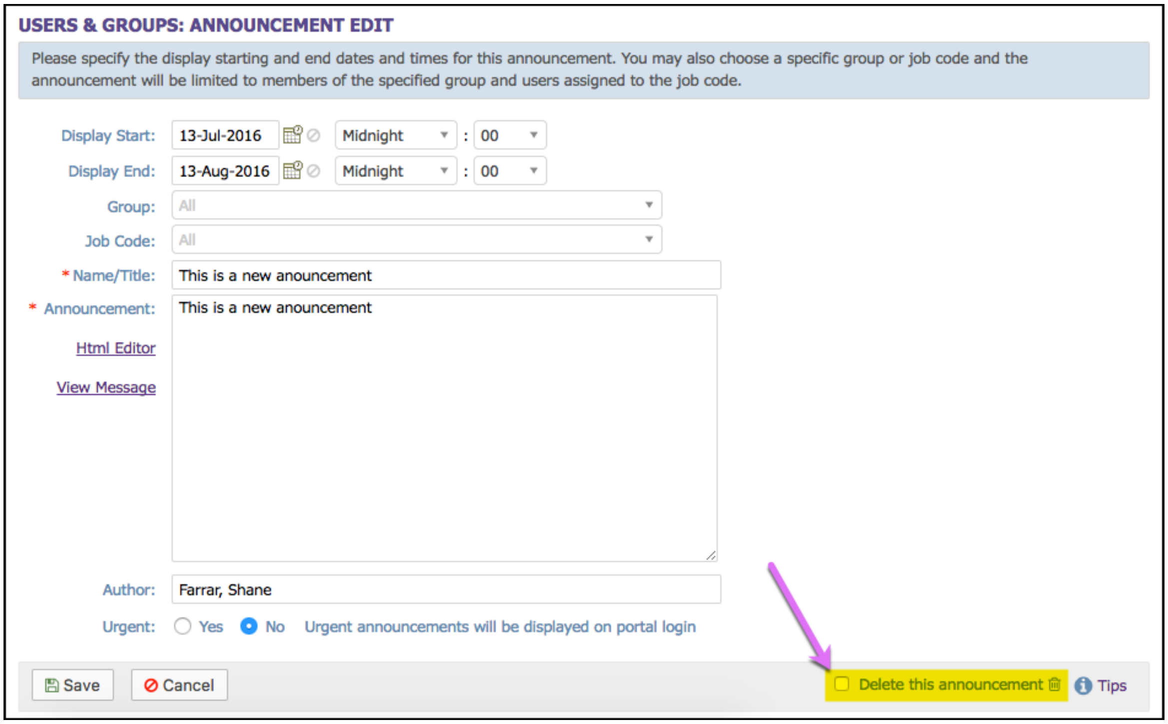


Figure 1-63 – Users & Groups: Delete Announcement

1.7 Users & Groups: Reports

The **Users & Groups: Reports** drop down selection provides several pre-designed reports of Users & Groups stored in your Course Manager repository. Reports are listed alphabetically by Report Name. Click on the Report you wish to view.

The following is a list of the current Reports. Additional Reports created as jsp's or custom reports purchased from OnPoint can be added to this list using the Manage Reports function under the Administration menu.

REPORTS: User & Group Reports

No	Report Name	Report Title	Description	Type
602	Assessment Set Completion Status	Assessment Set Completion Status	Displays all users who have completed a specified Assessment Set, for a selected date range.	Standard
601	Assignment Completion Percent Analysis by Primary Group	Assignment Completion Percent Analysis by Primary Group	This report displays a list of user assignments with individual assignment percentage completion analysis as well as total analysis for all assignments completed by a user within a date range. The report specifies a Primary Group, but can report on one or all Groups.	Standard
600	Assignment Completion Time Analysis by Primary Group	Assignment Completion Time Analysis by Primary Group	This report displays a list of user assignments with individual assignment time analysis as well as total time analysis for all assignments completed by a user within a date range. The report specifies a Primary Group, but can report on one or all Groups.	Standard
606	Course Time Summary	Course Time Summary	Course Time Summary	Standard

Figure 1-64A – Users & Groups: Reports List

Most reports have one or more filter options that assist in narrowing the results as desired.

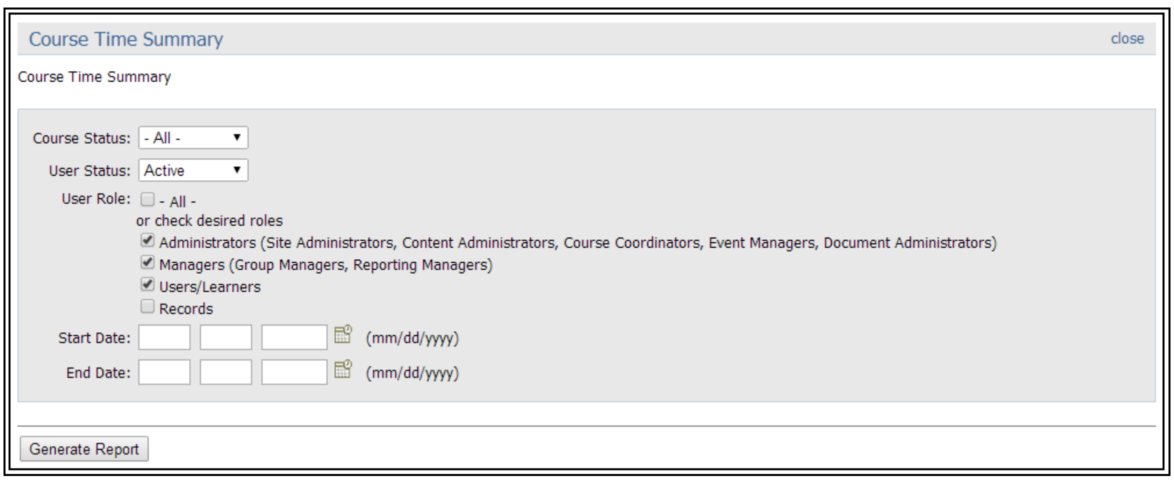
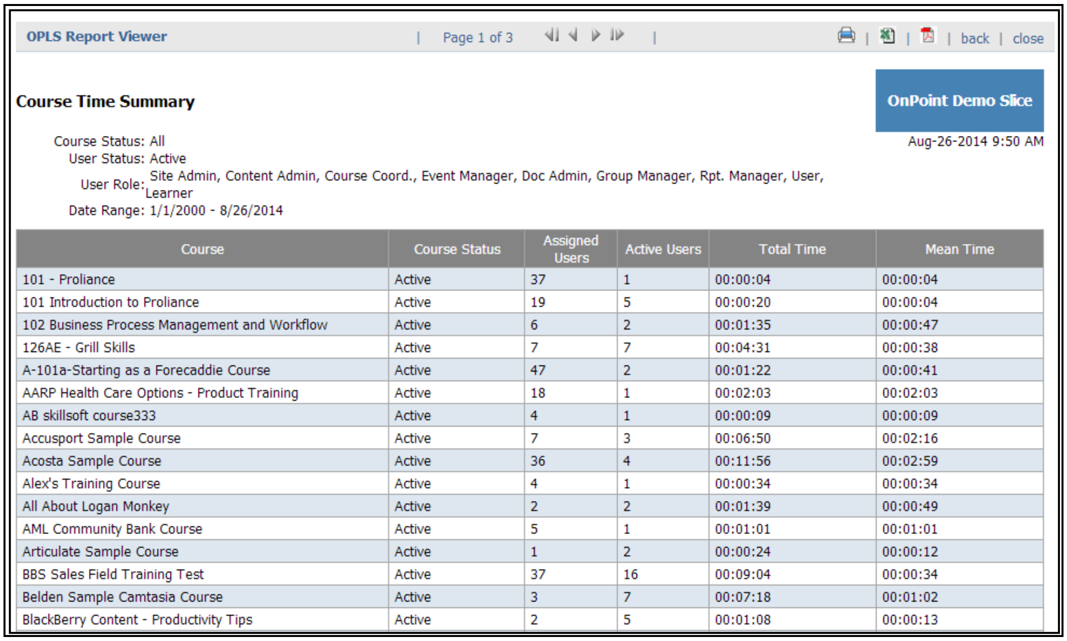


Figure 1-64B – Users & Groups: Select Report Criteria

Select your Report criteria from the available drop-down menu options, and click the **Generate Report** button to run the report. The report results will display with the OPLS Report Viewer in a pop-up window.



OPLS Report Viewer | Page 1 of 3 | back | close

Course Time Summary

OnPoint Demo Slice

Aug-26-2014 9:50 AM

Course Status: All
User Status: Active
User Role: Site Admin, Content Admin, Course Coord., Event Manager, Doc Admin, Group Manager, Rpt. Manager, User, Learner
Date Range: 1/1/2000 - 8/26/2014

Course	Course Status	Assigned Users	Active Users	Total Time	Mean Time
101 - Proliance	Active	37	1	00:00:04	00:00:04
101 Introduction to Proliance	Active	19	5	00:00:20	00:00:04
102 Business Process Management and Workflow	Active	6	2	00:01:35	00:00:47
126AE - Grill Skills	Active	7	7	00:04:31	00:00:38
A-101a-Starting as a Forecaddie Course	Active	47	2	00:01:22	00:00:41
AARP Health Care Options - Product Training	Active	18	1	00:02:03	00:02:03
AB skillsoft course333	Active	4	1	00:00:09	00:00:09
Accusport Sample Course	Active	7	3	00:06:50	00:02:16
Acosta Sample Course	Active	36	4	00:11:56	00:02:59
Alex's Training Course	Active	4	1	00:00:34	00:00:34
All About Logan Monkey	Active	2	2	00:01:39	00:00:49
AML Community Bank Course	Active	5	1	00:01:01	00:01:01
Articulate Sample Course	Active	1	2	00:00:24	00:00:12
BBS Sales Field Training Test	Active	37	16	00:09:04	00:00:34
Belden Sample Camtasia Course	Active	3	7	00:07:18	00:01:02
BlackBerry Content - Productivity Tips	Active	2	5	00:01:08	00:00:13

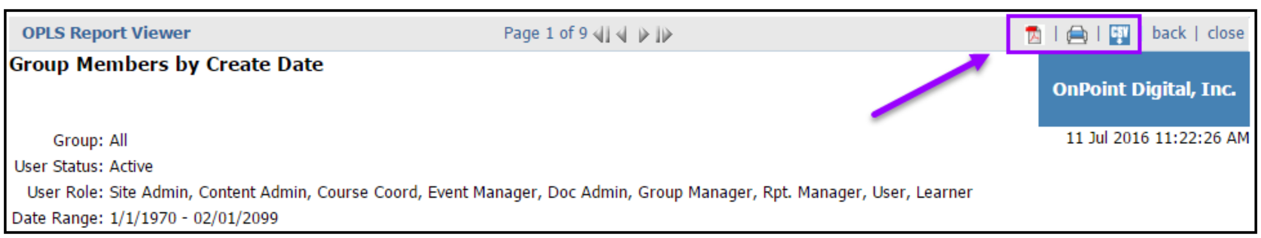
Figure 1-64C – Users & Groups: Sample Report

Output Data to Spreadsheets

The Output Data to Spreadsheets utility allows you to dump all of the data in a selected database table to a CSV file.

The CSV file can be **Printed**, **Exported** to CSV or as a **PDF**.

Note: This functionality is only available in Course Manager, and not in Performance Manager; even if the report is specified to be available in Performance Manager, this icon does not display.



OPLS Report Viewer Page 1 of 9 | back | close

Group Members by Create Date

OnPoint Digital, Inc.

11 Jul 2016 11:22:26 AM

Group: All
User Status: Active
User Role: Site Admin, Content Admin, Course Coord, Event Manager, Doc Admin, Group Manager, Rpt. Manager, User, Learner
Date Range: 1/1/1970 - 02/01/2099

Figure 1-65A – Users & Groups: Reports Table – Output Data to Spreadsheet Icon