Learning Nexus Ltd.

Learning Management System Release 2.13

System Administrator’s Guide

DISCLAIMER

Copyright

List of Trademarks

This page intentionally left blank

Contents

1. About the Learning Management System 1

LMS Components 1
LMS Core Module 1
Relational Database Management System 1
LMS User Import Utility 2
LMS Content Integration Utility 2

LMS Data Flow 2

2. LMS Requirements 3

Database Requirements 3

LMS Server Requirements 3
Server Hardware Requirements 3
Server Software Requirements 4

LMS Client Requirements 4
Client Hardware Requirements 4
Client Software Requirements 4

3. LMS User Interface 6

Menu Navigation Bar 6

Main Content Area 6

Page Navigation Bar 7

4. LMS Administration Tasks 8

Who’s who in the LMS? 8

What does a System Administrator do? 9

What does a Site Administrator do? 9

What does a Group Manager do? 10

5. System Administrator Tasks 11

Modifying the System Settings 12
General Settings 12
E-mail Settings 13
Security Settings 15

Managing Sites 18
Modifying a Site 19
Modifying Site Courses 20
Adding a Site 21
General Settings 21
New User Settings 22
E-mail Settings 23
Display Settings 24
Security Settings 25
Deleting a Site 27
Generating Usage Reports for a Site 27
Generating a Multi-Site Access Summary Report 27
Generating a Site Member Summary Report 30
Viewing the System Event Log 31

Managing Courses 33
Modifying a Course 33
Retiring Courses 35
Activating Courses 35
Deleting Courses 35

Managing System Administrators 36
Adding an Administrator 37
Deleting an Administrator 38
Modifying an Administrator 38

6. Site Administrator Tasks **41**
Modifying Site Settings 43
Managing Site Groups 50
Setting the Default Group 51
Adding a Group 51
Deleting a Group 52
Modifying a Group 52
Modifying the Group Title 53
Modifying the Group Courses 53
Modifying the Group Users 54
Modifying the Group TNA 54
Generating Usage Reports for the Group 55
Generating Risk Assessment Reports for the Group 55
Generating a Group Member Summary Report 56
Generating Usage Reports for a Group 57
Managing Site Users 58
Adding a User 59
Modifying a User 61
Relocating Users 63
Retiring Users 63
Activating Users 64
Deleting Users 64
Managing Site Tools 65
Adding TNA Subjects and Topics 66
Deleting TNA Subjects and Topics 67
Customising TNA Selections 67
Generating Usage Reports for the Site 69
Generating Risk Assessment Reports for the Site 69
Viewing the Site Event Log 69
7. Group Manager Tasks **71**
Generating Group Usage Reports 71
Generating Group Risk Reports 72

8. Generating Administration Reports **73**
Learning Activity Report 77
Access Summary Report 77
Detailed Report 78
Course Information 79
Lesson Information 79
Objective Information 80
Usage Type Summary Report 82
Zero Usage Summary Report 84
Learning Tool Reports 85
Learning Methods 86
Individual Report 88
Multi-User Target Report 89
Multi-User Budget Report 90
Training Needs Analysis 91
Individual Report 93
Multi-User Level Summary 94
Multi-User Level Report 95
Multi-User Topic Report 96
Zero Usage Report 97
Certificate Report 98

9. Generating Risk Assessment Reports **101**
Risk Report by Topic 104
Risk Report by User 106
Risk Detail Summary 108
Risk Assessment Notes Report 109

Figures

Figure 3-1: LMS User Interface Layout 6
Figure 4-1: LMS Organisational Hierarchy 8
Figure 5-1: System Administration Menu 11
Figure 5-2: System Settings – General 12
Figure 5-3: System Settings – E-Mail 13
Figure 5-4: System Settings – Security 15
Figure 5-5: Manage Sites Menu 18
Figure 5-6: Modify Site Menu 19
Figure 5-7: Modify Site Courses Section 20
Figure 5-8: Add Site – General Settings 21
Figure 5-9: Add Site – New User Settings 22
Figure 5-10: Add Site – E-mail Settings 23
Figure 5-11: Add Site – Display Settings 24
Figure 5-12: Add Site – Security Settings 26
Figure 5-13: Multi-Site Access Summary Options Dialog 28
Figure 5-14: Sample Multi-Site Access Summary Report 29
Figure 5-15: Sample Site Member Summary Report 30
Figure 5-16: Sample Site Users Report 31
Figure 5-17: Sample System Event Log Report 32
Figure 5-18: Manage Courses Menu 33
Figure 5-19: Course Modification Section 34
Figure 5-20: System Administrator Account Management Menu 36
Figure 5-21: Add Administrator Section 37
Figure 5-22: Modify Administrator Section 39
Figure 6-1: Main Menu for a Site Administrator 41
Figure 6-2: Site Administration Menu 42
Figure 6-3: Modify Site – General Settings 43
Figure 6-4: Modify Site – New User Settings 44
Figure 6-5: Modify Site – E-mail Settings 45
Figure 6-6: Modify Site – Display Settings 46
Figure 6-7: Modify Site – Security Settings 48
Figure 6-8: Manage Site Groups Menu 50
Figure 6-9: New Site Group Section 51
Figure 6-10: Modify Group Menu 52
Figure 6-11: Modify Group Courses Section 53
Figure 6-12: Modify Group Users Section 54
Figure 6-13: Modify Group TNA Section 55
Figure 6-14: Sample Group Member Summary Report 56
Figure 6-15: Sample Group Users Report 56
Figure 6-16: Manage Site Users Menu 58
Figure 6-17: Add User Section 59
Figure 6-18: Modify User Section 61
Figure 6-19: Relocate Users Section 63
Figure 6-20: Manage Site Tools Menu 65
Figure 6-21: Add TNA Subjects and Topics Section 66
Figure 6-22: Delete TNA Subjects and Topics Section 67
Figure 6-23: Customise TNA Selections Section 68
Figure 6-24: Sample Site Event Log Report 70
Figure 7-1: Main Menu for a Group Manager 71
Figure 7-2: Group Selection Menu for Group Reports 72
Figure 8-1: Administration Report Menu 73
Figure 8-2: Administration Report Options Menu 75
Figure 8-3: Sample Access Summary Report 77
Figure 8-4: Sample Detailed Learning Activity Report 78
Figure 8-5: Sample Usage Type Summary Report 82
Figure 8-6: Sample Zero Usage Summary Report 84

Figure 8-7: Administration Learning Tool Reports Menu 85
Figure 8-8: Learning Methods Report Menu 86
Figure 8-9: Sample Learning Methods Individual Report 88
Figure 8-10: Sample Learning Methods Target Report 89
Figure 8-11: Sample Learning Methods Budget Report 90
Figure 8-12: Training Needs Analysis Report Menu 91
Figure 8-13: Sample Training Needs Analysis Individual Report 93
Figure 8-14: Sample Training Needs Analysis Multi-User Level Summary Report 94
Figure 8-15: Sample Training Needs Analysis Multi-User Level Report 95
Figure 8-16: Sample Training Needs Analysis Multi-User Topic Report 96
Figure 8-17: Sample Training Needs Analysis Zero Usage Report 97
Figure 8-18: Achievement Certificates by User Example 98
Figure 8-19: Certificate of Achievement Example 100
Figure 9-1: Risk Reports Menu 101
Figure 9-2: Risk Report Options Menu 103
Figure 9-3: Sample Risk Report by Topic 104
Figure 9-4: Sample Risk Report by User 106
Figure 9-5: Sample Risk Detail Summary Report 108
Figure 9-6: Sample Risk Assessment Notes Report 109
Figure 9-7: Add / Modify note dialog 110

This page intentionally left blank

1. About the Learning Management System

The Learning Management System (LMS) is a highly effective, standards-based product capable of managing learners in an effective, hierarchical manner and organising, delivering and tracking both online web-based courses and offline content such as books and videos.

The LMS has been designed to be as simple to use as possible for both learners and administrators and is fully web-based and therefore can be deployed across a corporate Intranet, the Internet or in the case of small learning centres it can be accessed throughout the learning centre using a personal web server installed on one of the centre's machines.

LMS Components

The LMS consists of the following components: -

- LMS Core Module

  The core module provides a user interface for managing users and delivering courses, as well as the underlying technology needed to connect to the LMS database, web clients and course materials.

- Relational Database Management System

  This maintains one or more relational databases dedicated to the LMS. It may additionally contain other databases that are not used by the LMS.

- LMS User Import Utility

  This utility provides a mechanism for easily adding large numbers of users to the LMS database.

- LMS Content Integration Utility

  This utility provides a mechanism for importing third-party content into the LMS.

LMS Core Module

This is the main component of the Learning Management System. The core module stores all of the information about the sites, groups and users that have been defined within the system as well as the details of the courses that can be accessed and all of the data on the usage of these courses by the users of the system.

The core module also provides an easy to use, web-based interface for managing this information, accessing the courses and producing reports on the usage of the courses.

Relational Database Management System

The Learning Management System stores its data in a relational database, which consists of a series of tables. For a small installation, the database management software is the Microsoft Jet Database Engine and this is used to connect to a Microsoft Access database on the same machine as the LMS. For a larger scale installation, it is recommended that Microsoft SQL Server be used as the database management software. This can reside on the same machine as the LMS but generally it will reside on a separate machine for performance reasons.

An LMS-specific database is created with the database management system and then customised during the LMS installation. The LMS core module interacts with this database using database transactions to retrieve and update information about users, courses, course usage data etc.

LMS User Import Utility

This utility provides a mechanism for automatically importing large numbers of users into the Learning Management System without the need to type their details into the LMS interface one by one. The utility makes use of a pre-formatted text file containing the details of the users to be added to the LMS which can be generated very easily from an existing database of users.

LMS Content Integration Utility

This utility provides a mechanism for importing content that has been provided by a third-party vendor into the Learning Management System.

Ideally, these courses will have been designed using the AICC (Aviation Industry CBT Committee) guidelines for interoperability or will meet the conformance requirements of version 1.2 of the SCORM (Shareable Content Object Reference Model), which define standard mechanisms for communication between courseware and learning management systems. These courses can be fully integrated into the LMS. For more information on the AICC guidelines, please visit http://www.aicc.org. For more information on the SCORM conformance requirements, please visit http://www.adlnet.org.

However, many web-based courses that have not been designed using the AICC or SCORM standards can also be imported, launched and tracked by the LMS although the usage information that is recorded by the LMS for these courses will be less detailed.

It is also possible to define non web-based or 'offline' courses with this utility and import these into the LMS. Whilst users will not be able to utilise these courses directly through the LMS interface, this will enable administrators and managers to manually create usage records for these courses which can then be included in the reports of the learning activities of users.

LMS Data Flow

The LMS uses several technologies to send and receive data among components within the system. The LMS core module is the entry point for all users. When a user logs on to the LMS, the core module provides the client browser with an interface. This interface provides access to the administration functions and the course materials. The core module also provides a mechanism for accessing and modifying data stored in the relational database and the course content servers. Microsoft Internet Information Server (IIS) and the Microsoft Data Access Components (MDAC) manage these connections.

Communication between the relational database and the LMS is based on an OLE DB interface provided by Microsoft ActiveX Data Objects (ADO). Information such as user names, course structure and student progress is stored as records in tables within the relational database. The LMS core module uses Structured Query Language (SQL) commands to send and receive data from the database.

To access course content, the LMS retrieves the URL associated with a particular course's activity, points the student's web browser to the corresponding URL, and displays the file's contents in the LMS user interface. Usage information, such as student scores and completion status, passes from the course content to the LMS through HTTP commands.

2. LMS Requirements

The Learning Management System is supported on a specific set of hardware and software components. If you are installing the LMS for the first time on a server or upgrading from an earlier release, you may need to upgrade hardware and/or software before the LMS can function effectively on that machine. Using the LMS with unsupported hardware and/or software may result in data loss, as well as problems accessing the system.

Before installing the LMS, please ensure that you have installed the required hardware and software described in this chapter.

Database Requirements

The Learning Management System requires a relational database management system as a database is created (or upgraded) during the installation process specifically for use with the LMS. The LMS supports the following relational database management systems: -

- Microsoft Jet Database Engine v4 (MDAC) (latest Service Pack recommended)
- Microsoft SQL Server 2000 (latest Service Pack recommended)
- Microsoft SQL Server 2005 (latest Service Pack recommended)
- Microsoft SQL Server 2008 (latest Service Pack recommended)

The Microsoft Jet Database Engine v4 is utilised in a small-scale installation to connect to a Microsoft Access 2000 database and is included as part of the Microsoft Data Access Components (MDAC) version 2.0 to 2.5. There are no specific hardware requirements.

Microsoft SQL Server is recommended for larger-scale installations. For further information on the system requirements of Microsoft SQL Server, please see the supplied documentation or visit http://www.microsoft.com/sql. Mixed mode authentication is required for the connection to the SQL Server database.

You should allow 1 MB of database table space for each LMS user.

LMS Server Requirements

It is recommended that the server on which the LMS is to be installed meets the following minimum hardware and software requirements: -

Server Hardware Requirements

- Pentium-based (Pentium® III or later) server
- 800 MHz or faster
- 512 MB of RAM
- 500 MB of disk space

These are the minimum recommended requirements for the LMS but it is probable that your installation will require more than this. The server’s processor and memory requirements are directly affected by the number of courses and users registered in the LMS, and particularly by the number of students using the LMS at any one time and this will have a corresponding effect on the speed of the server.

Server Software Requirements

The LMS requires that either of the following operating systems and system software be installed before the LMS is installed: -

- Microsoft Windows 2000 Server (latest Service Pack recommended)
- Microsoft Internet Information Server v5

Or

- Microsoft Windows Server 2003 (latest Service Pack recommended)
- Microsoft Internet Information Server v6

Or

- Microsoft Windows Server 2008 (latest Service Pack recommended)
- Microsoft Internet Information Server v7

Alternatively, if a very small scale installation is required (between 1 and 5 client computers), the following operating systems and system software are required before the LMS is installed: -

- Microsoft Windows 2000 Professional (latest Service Pack recommended)
- Microsoft Internet Information Server v5

Or

- Microsoft Windows XP Professional (latest Service Pack recommended)
- Microsoft Internet Information Server v5.1

Or

- Microsoft Windows Vista Business, Enterprise or Ultimate Edition (latest Service Pack recommended)
- Microsoft Internet Information Server v7

In either case, the following software components are also required and will be updated during the LMS installation if necessary: -

- Microsoft Data Access Components (MDAC) v2.5
- Microsoft Windows Script Engine v5.6

LMS Client Requirements

It is recommended that the client machines that are used to access the LMS meet the following minimum hardware and software requirements: -

Client Hardware Requirements

- Pentium®-based (Pentium® II or later) computer
- 500 MHz or faster
- 256 MB of RAM
- 50 MB disk space
- 56 Kb/s connection

Client Software Requirements

The following operating systems are supported for use on client machines: -

- Microsoft Windows 2000 Professional
- Microsoft Windows XP
- Microsoft Windows Vista
- Microsoft Windows 7

The following web browsers are supported for use on client machines: -

- Microsoft Internet Explorer 6 or later
- Microsoft Internet Explorer 8 is recommended

The following Internet Explorer settings must be enabled: -

- Run ActiveX controls and plug-ins
- Script ActiveX controls marked safe for scripting
- Submit non-encrypted form data
- Active scripting
- Accept session cookies

It is recommended that the following Internet Explorer security settings be enabled: -

- Access data sources across domains (if the LMS resides on a different domain to any courseware content)
- File download (if report saving is required)

It is also recommended that the browsers be set to show the newest version of a page, rather than showing cached pages.

3. LMS User Interface

The user interface for the Learning Management System consists of three separate content areas: a menu navigation bar; a main content area and a page navigation bar. Figure 3-1 illustrates the layout of these content areas: -

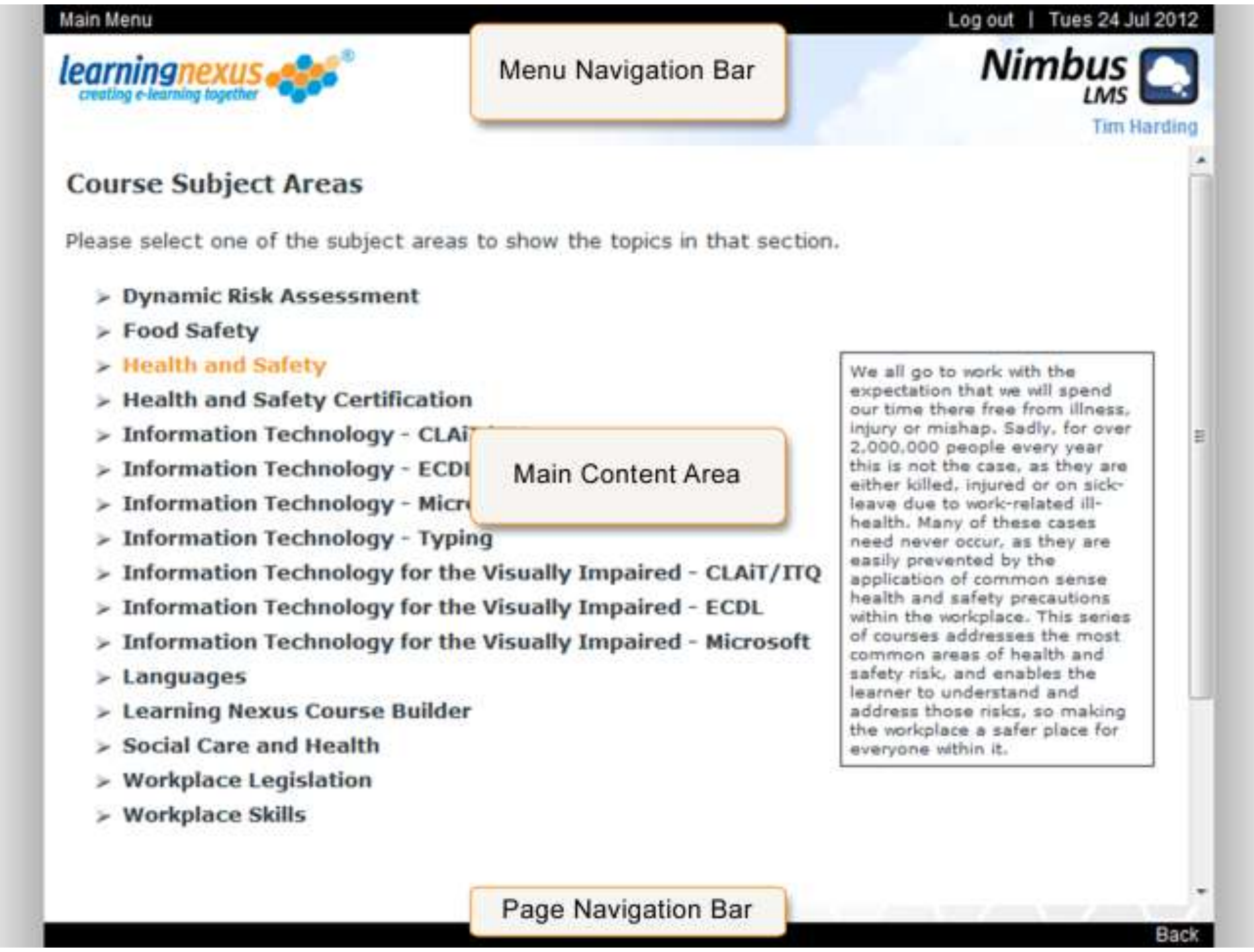


Figure 3-1: LMS User Interface Layout

Menu Navigation Bar

The menu navigation bar is used to display three content items: -

- Menu shortcuts
- Today's date
- The familiar name of the current LMS user

Main Content Area

The main content area is used to display the interface used to perform the functions available within the current section of the LMS. These pages usually consist of a brief explanation of the functions available in the section, instructions on the use of these functions and the menu or tools used to perform them.

Page Navigation Bar

The page navigation bar is used to display shortcuts to the previous or next page in the current section of the LMS when these functions are available.

4. LMS Administration Tasks

There are many administrative tasks that must be carried out within the LMS, such as adding users and generating reports on course usage. In order to help you manage these tasks effectively, the LMS supports four types of user; each with a different level of responsibility and control over the LMS functions and each corresponding to a different level in the organisational hierarchy that can be defined within the LMS.

The LMS uses the concept of sites and groups to effectively organise the courses and users which it manages. Figure 4-1 illustrates this organisational hierarchy: -

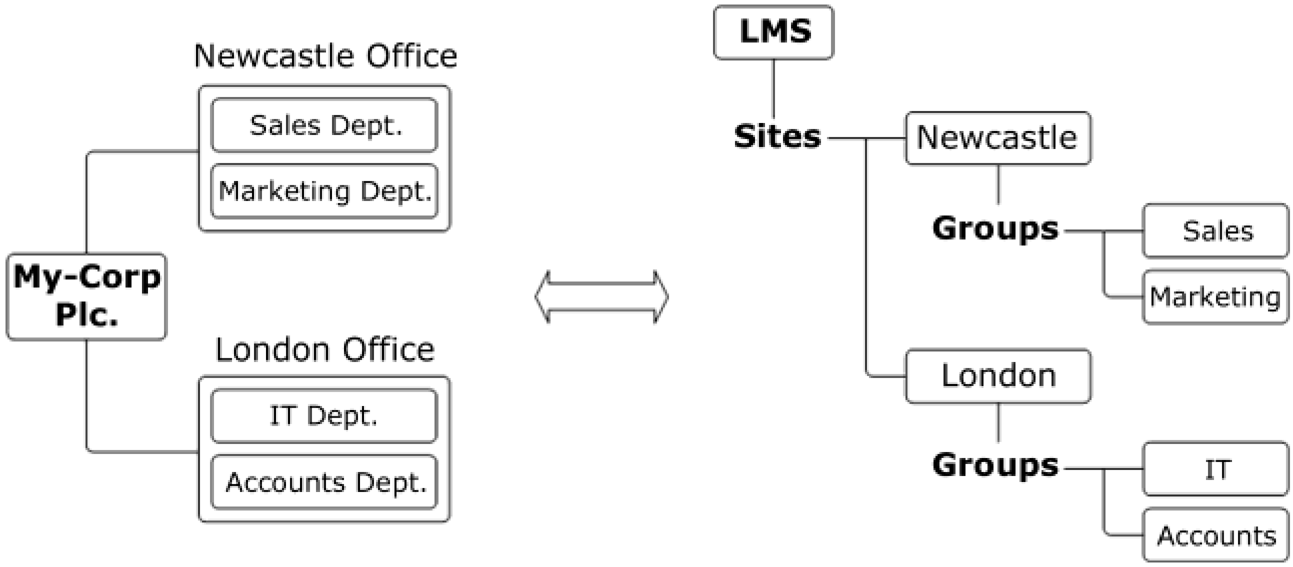


Figure 4-1: LMS Organisational Hierarchy

This example relates the different sites within the LMS to the different geographical locations of the offices within 'My-Corp Plc' and the groups within the sites to the departments within these offices. However, this hierarchy can be defined in many different ways, with a site or group corresponding to any logical grouping of users and courses. For example, it may be more appropriate for you to organise users by job role rather than physical location etc.

Who's who in the LMS?

The four types of user supported by the LMS, in decreasing order of responsibility, are as follows: -

- System Administrators

  These users have complete control over all of the settings and functions of the LMS. System administrators exist above the site hierarchy and as such, are unable to study courses.

- Site Administrators

  These users are members of a particular site within the LMS and have complete control over all of the settings and functions of the site to which they belong. Site administrators may also study courses.

- Group Managers

  These users are members of one or more groups within a site and may generate reports of learning activity for the other members of the group(s) to which they belong. Group managers may also study courses.

- Users

  Standard users are either members of a site or are members of one or more groups within a site and may study courses and produce reports of their own learning activities.

What does a System Administrator do?

An LMS system administrator is responsible for the overall configuration of the system and this role is often assigned to the person that is responsible for the installation of the LMS and the management of the server(s) on which it resides.

A system administration account is automatically created during the LMS installation / upgrade process using the details that are entered by the person performing the installation. There can be multiple system administration user accounts defined within the LMS.

The main responsibilities of a system administrator are as follows: -

- Managing the global settings of the LMS
- Creating and managing the sites defined within the LMS
- Managing the courses that are delivered by the LMS
- Managing the system administration user accounts

An LMS system administrator may also perform all of the administration tasks that can be performed by a site administrator.

What does a Site Administrator do?

An LMS site administrator is responsible for the configuration of the site within the LMS of which they are a member. This role is often assigned to the person(s) responsible for managing the learning activities for the location corresponding to their LMS site.

If the LMS has been upgraded from a previous version that did not support sites, the system administration accounts from the previous version will have been converted to site administration accounts for the default site in the new version. There can be multiple site administration user accounts for any particular site within the LMS.

The main responsibilities of a site administrator are as follows: -

- Managing the LMS settings for the site
- Creating and managing the groups defined within the site
- Creating and managing the user accounts defined within the site
- Generating learning activity reports for the site

An LMS site administrator may also perform all of the administration tasks that can be performed by a group manager.

What does a Group Manager do?

An LMS group manager is responsible for generating learning activity reports for the members of the group(s) which they manage. This role is often assigned to a team leader or supervisor. There can be multiple group manager accounts for any particular group within an LMS site.

5. System Administrator Tasks

An LMS system administration account exists outside of the site hierarchy that is defined within the LMS. Therefore, a system administrator does not belong to any particular site, and so is not able to study courses. This means that the menu that is displayed to a system administrator is different to that displayed to all other user types.

Figure 5-1 shows the LMS system administration menu: -

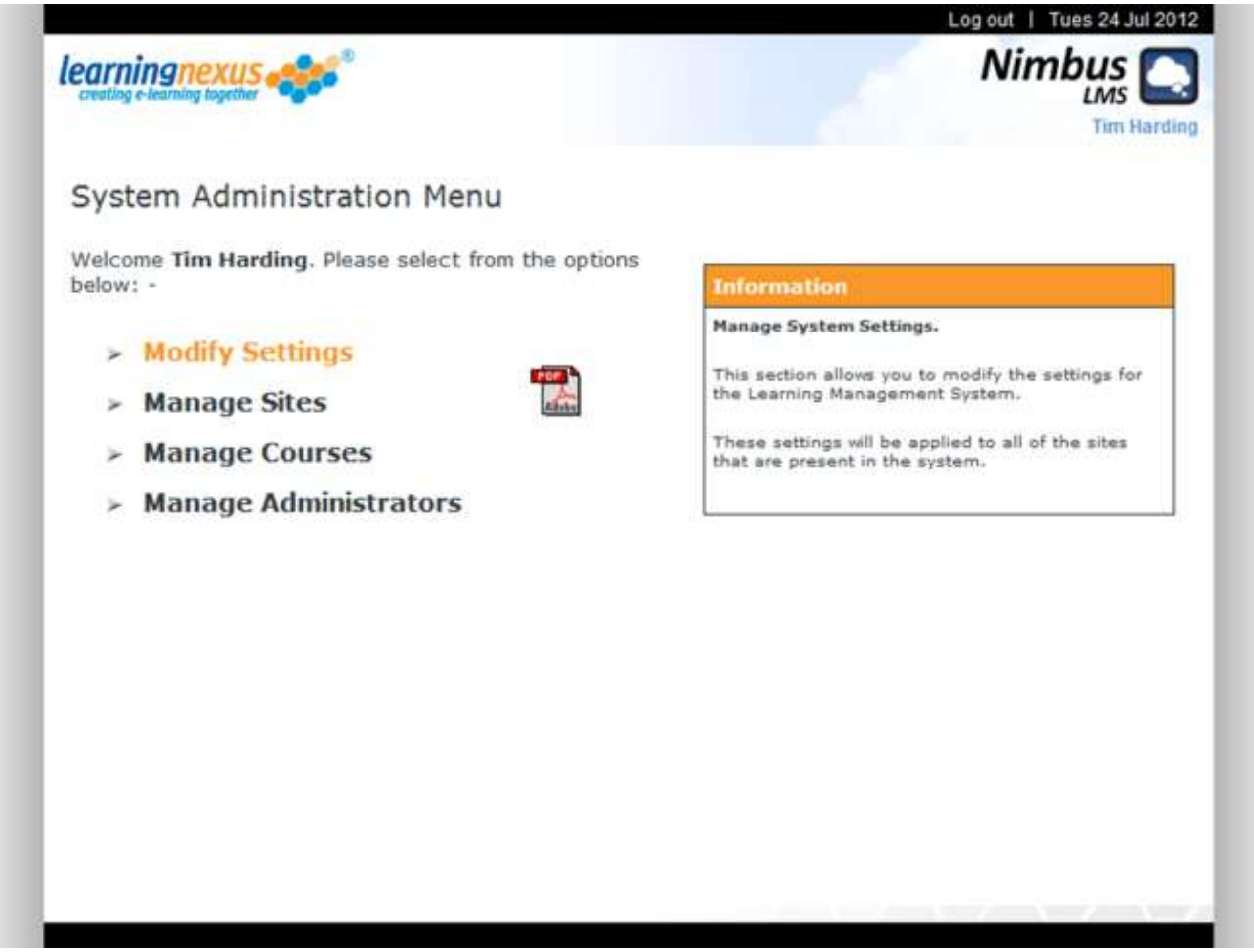


Figure 5-1: System Administration Menu

Please note that clicking on the 'Adobe PDF' icon will open this guide in a new window.

The system administration menu consists of four functions: -

- Modify Settings
- Manage Sites
- Manage Courses
- Manage Administrators

Each of these functions is explained in detail below: -

Modifying the System Settings

The LMS system settings section is accessed by clicking on the 'Modify Settings' item in the System Administration Menu and is arranged in three categories: -

- General Settings
- E-Mail Settings
- Security Settings

Each of these categories is explained in detail below: -

General Settings

Figure 5-2 shows the LMS general system settings: -

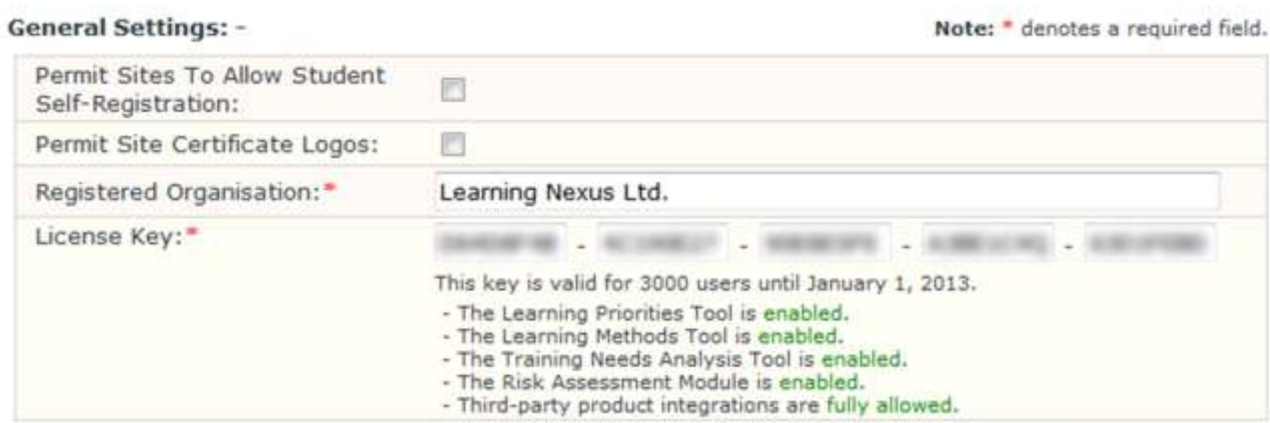


Figure 5-2: System Settings – General

The following settings can be modified in this category: -

- <u>Permit Sites to Allow Student Self-Registration</u>

  Selecting this option gives a site administrator the option of allowing new users of the LMS to register themselves as members of their site. Clearing this option prevents any new users of the LMS from registering themselves in any site and the user accounts for any new LMS users must be created by a system or site administrator.

- <u>Permit Site Certificate Logos</u>

  Selecting this option gives a site administrator the option of allowing the sites defined in the LMS to choose to show logos on the Certificates of Achievement and Completion for their site. For more information on these certificates, see the Certificate Report section on page 98 of this document.

- <u>Registered Organisation</u>

  The text in this field is displayed on the login screen of the LMS and on any certificates of achievement or completion that are generated by the LMS.

- <u>License Key</u>

  These five fields can be used to update the LMS license key which determines the maximum number of users that can be registered in the LMS, the date on which the LMS expires and the status of any of the optional LMS learning tools and modules that may be installed. Please contact your LMS supplier if you require an updated LMS license key.

E-mail Settings

Figure 5-3 shows the LMS system e-mail settings: -

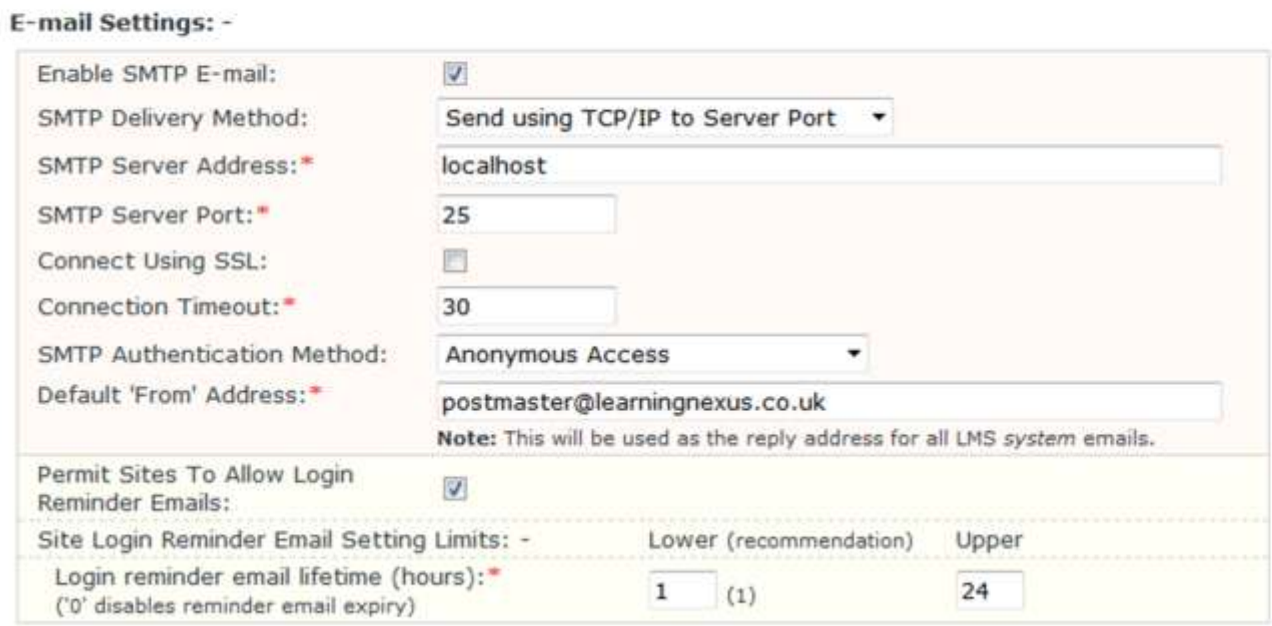


Figure 5-3: System Settings – E-Mail

The following settings can be modified in this category: -

- <u>Enable SMTP E-mail</u>

  Selecting this option enables the email features of the LMS including login reminder emails and report mailing (please note that this requires a separate SMTP mail server, the installation and configuration of which is beyond the scope of this document).
  If this option is selected, the following settings are displayed and must also be completed: -

  - <u>SMTP Delivery Method</u>
    This is the method by which emails are sent by the LMS. Available options are: -

    - Send using TCP/IP to Server Port
    - Send using Server Pickup Directory

  - <u>Default ‘Reply-to’ Address</u>
    This is the email address from which system emails will appear to be sent.

  If ‘Send using TCP/IP to Server Port’ is the selected delivery method then the following settings are displayed and must be completed: -

  - <u>SMTP Server Address</u>
    This is the DNS name or IP address of the SMTP server.

  - <u>SMTP Server Port</u>
    This is the TCP port on which the SMTP server accepts email.

  - <u>Connect Using SSL</u>
    If this option is selected, the LMS will send emails to the SMTP server using a secure SSL encrypted connection.

- <u>Connection Timeout</u>
  This is the length of time which can elapse before a connection attempt to the SMTP server will fail.

- <u>SMTP Authentication Method</u>
  This is the authentication method used by the LMS to connect to the SMTP server. Available options are: -

  - Anonymous Access
  - Basic Authentication (Plain Text)
  - Integrated NTLM Authentication

  If 'Basic Authentication (Plain Text)' is the selected authentication method, the following settings are displayed and must be completed: -

  - SMTP Authentication User ID
  - SMTP Authentication Password

If 'Send using Server Pickup Directory' is the selected delivery method then the following setting is displayed and must be completed: -

- SMTP Pickup Directory

- <u>Permit Sites To Allow Login Reminder Emails</u>

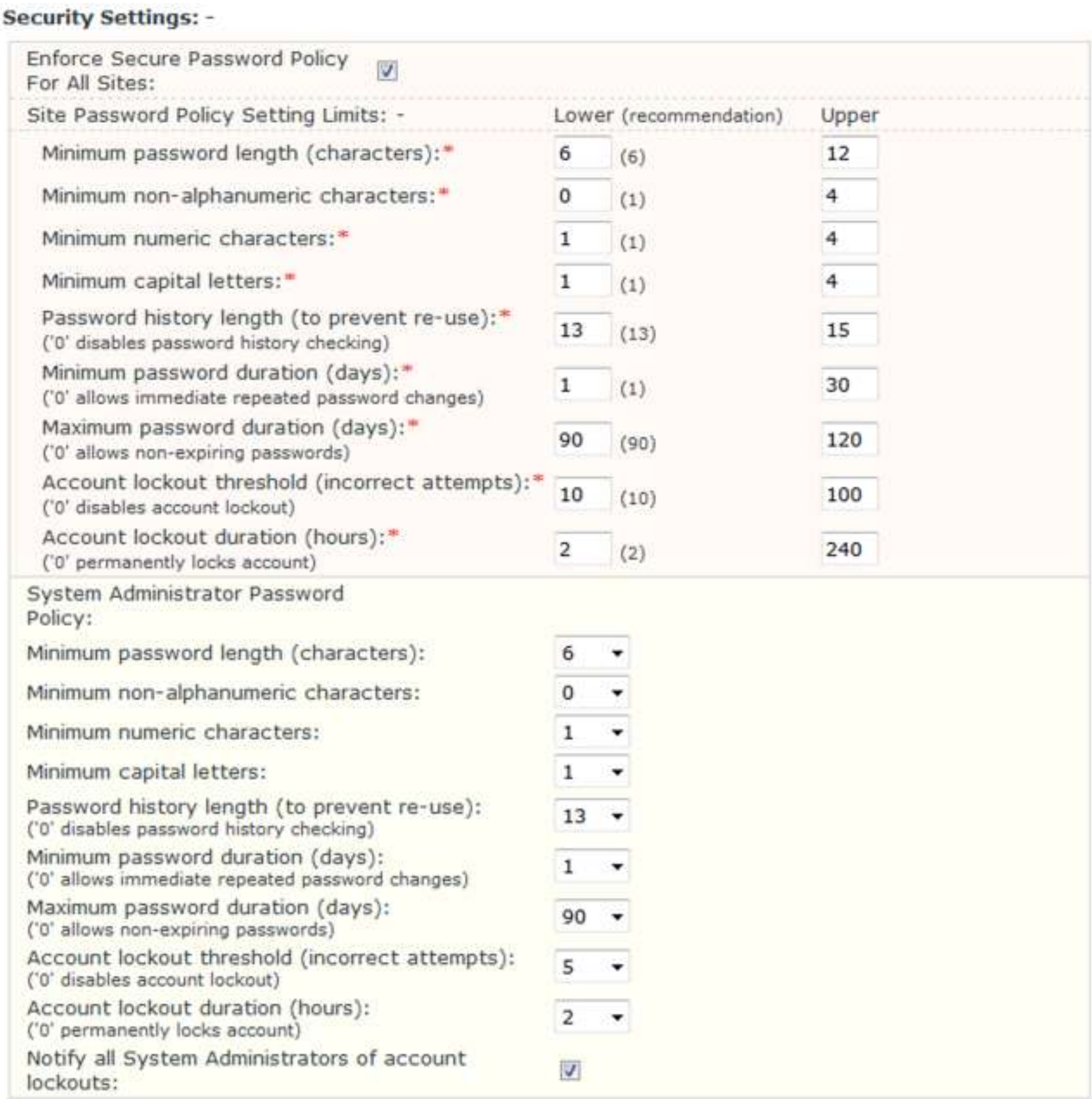
  This option is available if the 'Enable SMTP E-mail' option has been selected. Selecting this option gives a site administrator the option of allowing members of the site to request login reminder emails from the LMS login page. If this option is selected, the following settings are displayed and must be completed: -

  - <u>Site Login Reminder Email Setting Limits</u>
    The values of these settings are used to specify the lower and upper limits of the 'Login Reminder Emails' settings for sites defined in the LMS. An upper and lower limit must be specified for the following site settings: -

    - Login reminder email lifetime (hours)

Security Settings

Figure 5-4 shows the LMS system security settings: -



Security Settings: -

Enforce Secure Password Policy For All Sites:	☑		
Site Password Policy Setting Limits: -	Lower	(recommendation)	Upper
Minimum password length (characters):*	6	(6)	12
Minimum non-alphanumeric characters:*	0	(1)	4
Minimum numeric characters:*	1	(1)	4
Minimum capital letters:*	1	(1)	4
Password history length (to prevent re-use):* ('0' disables password history checking)	13	(13)	15
Minimum password duration (days):* ('0' allows immediate repeated password changes)	1	(1)	30
Maximum password duration (days):* ('0' allows non-expiring passwords)	90	(90)	120
Account lockout threshold (incorrect attempts):* ('0' disables account lockout)	10	(10)	100
Account lockout duration (hours):* ('0' permanently locks account)	2	(2)	240
System Administrator Password Policy:			
Minimum password length (characters):	6		
Minimum non-alphanumeric characters:	0		
Minimum numeric characters:	1		
Minimum capital letters:	1		
Password history length (to prevent re-use): ('0' disables password history checking)	13		
Minimum password duration (days): ('0' allows immediate repeated password changes)	1		
Maximum password duration (days): ('0' allows non-expiring passwords)	90		
Account lockout threshold (incorrect attempts): ('0' disables account lockout)	5		
Account lockout duration (hours): ('0' permanently locks account)	2		
Notify all System Administrators of account lockouts:	☑		

Figure 5-4: System Settings – Security

The following settings can be modified in this category: -

- Enforce Secure Password Policy For All Sites

  Selecting this option requires every site defined in the LMS to implement a secure password policy. If this option is selected, the following settings are displayed and must be completed: -

  - Site Password Policy Setting Limits
    The values of these settings are used to specify the lower and upper limits of the 'Site Password Policy' settings for sites defined in the LMS. An upper and lower limit must be specified for the following site settings: -

    - Minimum Password Length (characters)
    - Minimum non-alphanumeric characters
    - Minimum numeric characters
    - Minimum capital letters
    - Password history length (to prevent re-use)
    - Minimum password duration (days)
    - Maximum password duration (days)
    - Account lockout threshold (incorrect attempts)
    - Account lockout duration (hours)

- System Administrator Password Policy

  These settings specify the secure password policy which is applied to user accounts defined in the LMS which are members of the System Administrator role. The following settings must be completed: -

  - Minimum Password Length (characters)
    This setting specifies the minimum number of characters which are required for a valid password.

  - Minimum non-alphanumeric characters
    This setting specifies the minimum number of non-alphanumeric characters (i.e. not letters or numbers) which are required for a valid password.

  - Minimum numeric characters
    This setting specifies the minimum number of numeric characters (i.e. numbers) which are required for a valid password.

  - Minimum capital letters
    This setting specifies the minimum number capital letters which are required for a valid password.

  - Password history length (to prevent re-use)
    This setting specifies the number of previously used passwords which are retained by the LMS in order to prevent an old password from being re-used.

  - Minimum password duration (days)
    This setting specifies the minimum length of time which must elapse after a password is changed before the password can be changed again. This setting is used to prevent multiple password changes intended to circumvent the password history setting.

  - Maximum password duration (days)
    This setting specifies the maximum length of time which can elapse after a password is changed before the password must be changed again.

- <u>Account lockout threshold (incorrect attempts)</u>
  This setting specifies the maximum number of incorrect login attempts which can be made for a user account defined in the LMS before the account is locked and cannot be used.

- <u>Account lockout duration (hours)</u>
  This setting specifies the length of time which must elapse after an account has been locked before the account can be used again.

- <u>Notify all System Administrators of account lockouts</u>
  If this option is selected then all of the user accounts defined in the LMS which are members of the System Administrator role will be notified by email whenever a user account is locked by a password policy. Please note that this option is only functional if the 'Enable SMTP E-mail' option has also been selected.

Managing Sites

The LMS site management menu is accessed by clicking on the 'Manage Sites' item in the System Administration Menu. Figure 5-5 shows the site management menu: -

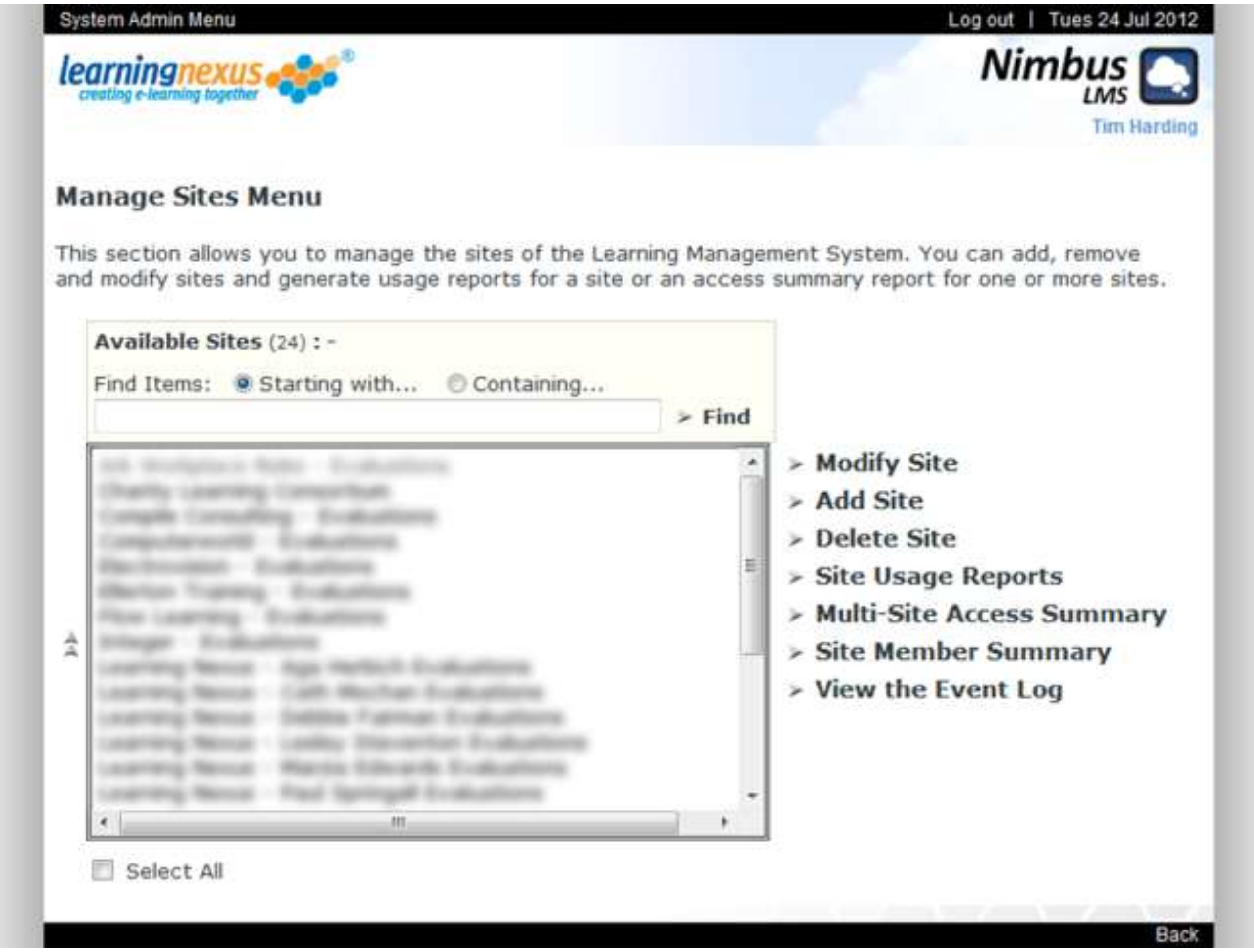


Figure 5-5: Manage Sites Menu

The site management menu consists of a list of all of the sites that are currently defined within the LMS, an option to select all of the sites and a menu of site management functions: -

- Modify Site
- Add Site
- Delete Site
- Site Usage Reports
- Multi-Site Access Summary
- Site Member Summary
- View the Event Log

The sites in the list can be located using the 'Find Items' box and can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations. Sites which do not contain any users are shown in grey to indicate that the site can be deleted if desired. Each of the site management functions is explained in detail below: -

Modifying a Site

The LMS site modification menu is accessed by selecting a single site from the list of those available and then clicking on the 'Modify Site' item in the site management menu.

Figure 5-6 shows the site modification menu: -

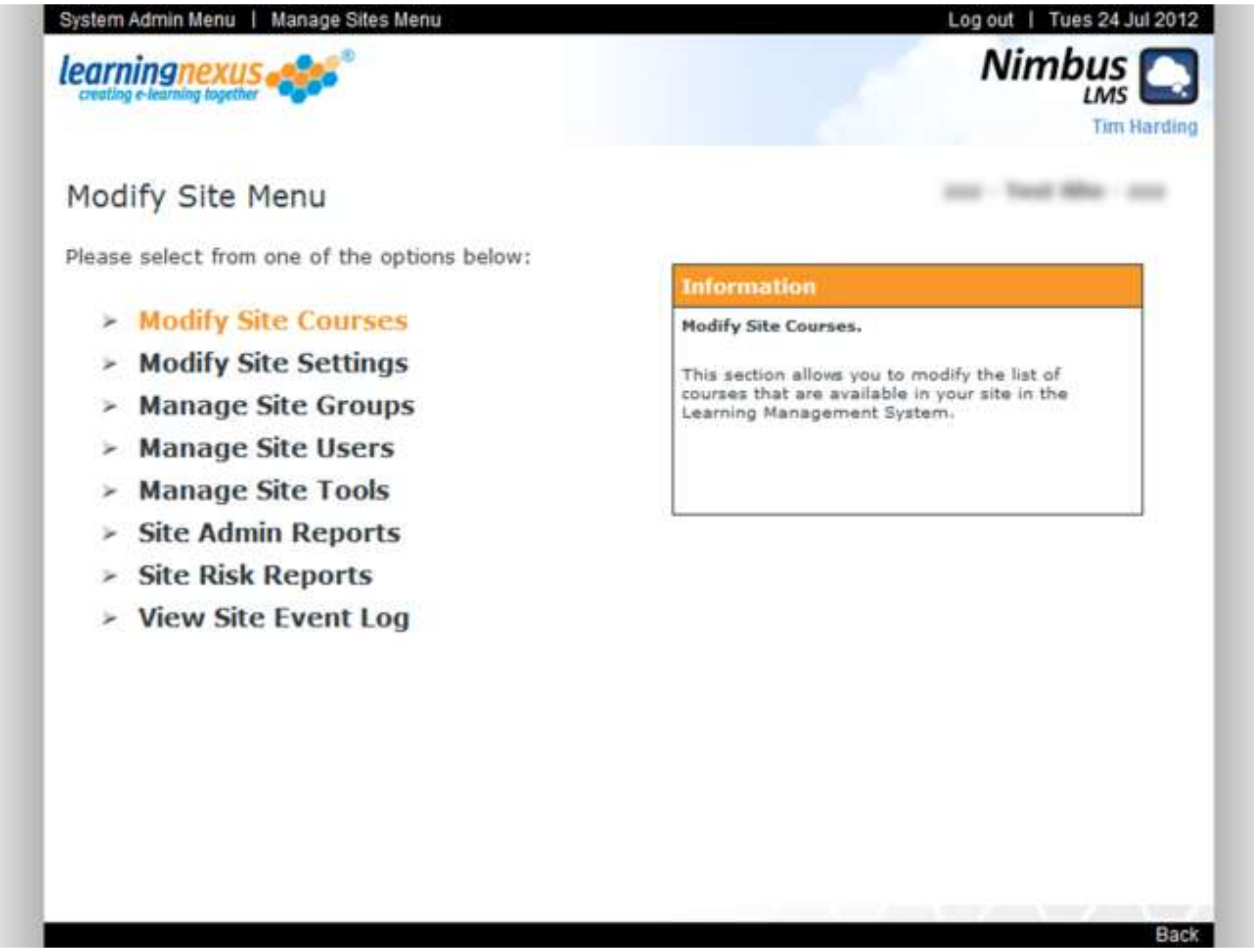


Figure 5-6: Modify Site Menu

The LMS site modification menu consists of eight possible functions: -

- Modify Site Courses
- Modify Site Settings
- Manage Site Groups
- Manage Site Users
- Manage Site Tools
- Site Admin Reports
- Site Risk Reports
- View Site Event Log

This menu is identical to that displayed to an LMS site administrator with the addition of the 'Modify Site Courses' item which allows the system administrator to specify the courses that are allocated to the site. This function is explained in detail below; the other site modification functions are explained in Chapter 6 - Site Administrator Tasks on page 41 of this document.

Modifying Site Courses

The section used to modify a site's courses is accessed by clicking on the 'Modify Site Courses' item in the Modify Site Menu. This section allows a system administrator to modify the list of courses that are made available by default to members of the selected site.

Figure 5-7 shows the site courses modification section of the LMS: -

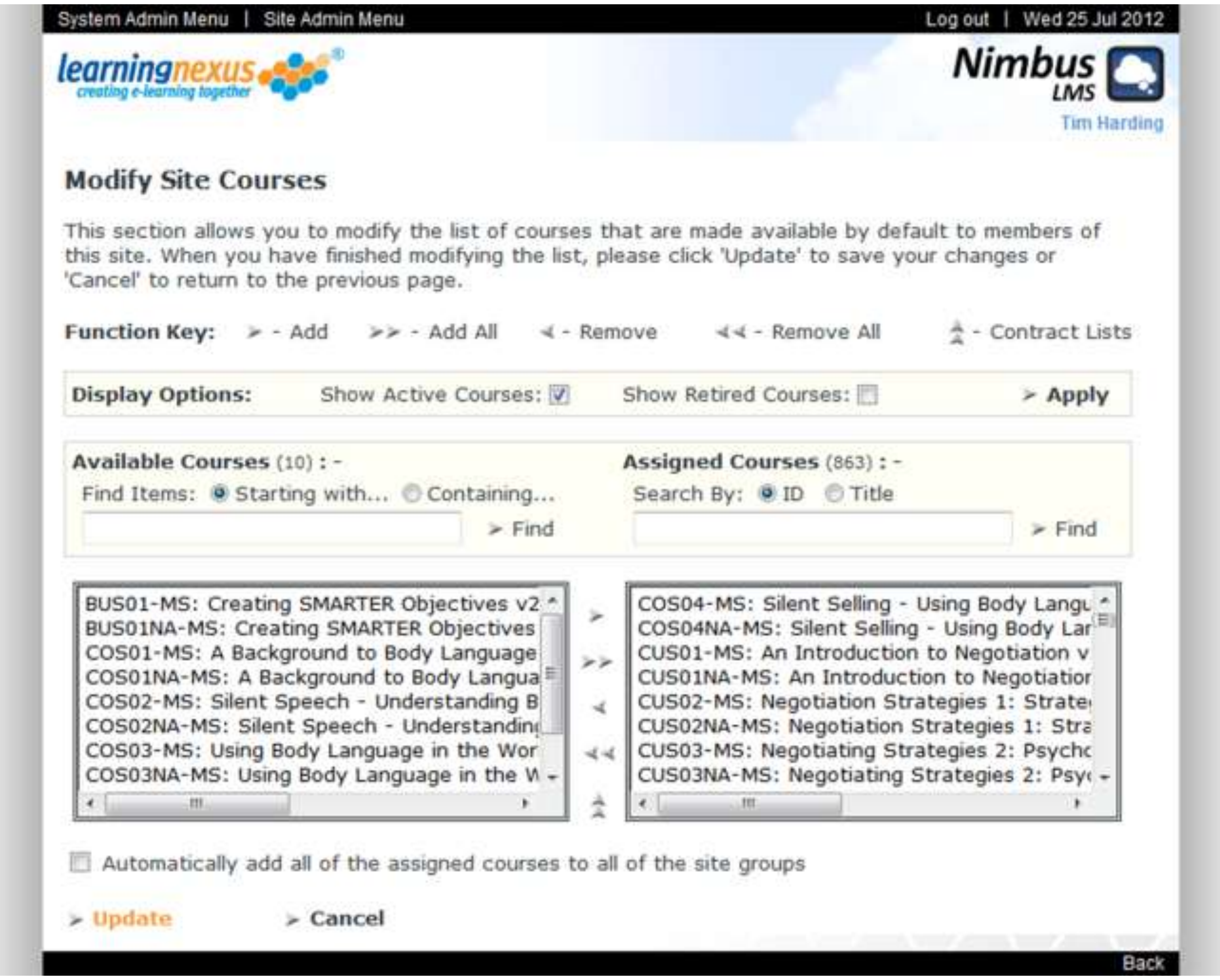


Figure 5-7: Modify Site Courses Section

On first entering this section, the 'Available Courses' list shows all of the courses that are defined within the LMS but have not yet been assigned to the site and the 'Assigned Courses' list shows all of the courses that have already been assigned to the site. The courses are shown using the ID specified for the course and then the course title and are listed alphabetically.

Courses in the lists can be located using the 'Find Items' boxes and are selected by using the usual click, control-click and shift-click keyboard / mouse combinations and are moved between the lists by using the arrow elements that are situated between the two lists. When the desired courses have been moved to the appropriate lists, the courses assigned to the site are confirmed by clicking on the 'Update' element. Selecting the option to 'Automatically add all of the assigned courses to all of the site groups' will replace the courses assigned to all of the groups defined in the LMS site with the selected courses.

Adding a Site

The section used to define a new site within the LMS is accessed by clicking on the 'Add Site' item in the Manage Sites Menu and is arranged in five categories: -

- General Settings
- New User Settings
- E-Mail Settings
- Display Settings
- Security Settings

Each of these categories is explained in detail below: -

General Settings

Figure 5-8 shows the LMS general site settings: -

Figure 5-8: Add Site – General Settings

The following settings can be specified in this category: -

- <u>Site Title:</u>

  This is the name of the site that will be used within the LMS

- <u>Restrict the number of users:</u>

  Selecting this option specifies that the number of user accounts that may exist within the site at any one time is to have an upper limit.

- <u>Limit the number of users to:</u>

  This option is only available if the previous option is selected. The number entered in this box specifies the maximum number of user accounts that may exist within the site at any one time.

- <u>Allow Site Administrators to delete users:</u>

  Selecting this option specifies that Site Administrators defined in the site are permitted to delete user accounts.

- Calculate Assessment Achievement Using:

  This option determines how the achievement status is determined for scored lessons defined within LMS courses. The available options are: -

  - Best Score
    The achievement status is calculated using the best score achieved by a user across all of their usage attempts.

  - Last Score
    The achievement status is calculated using the most recent score achieved by a user.

- Allow users to print their own certificates:

  Selecting this option specifies that members of the site who have qualified for a certificate of achievement or completion for any of the courses that they have studied are to be allowed to view and print these certificates themselves. If this option is not selected, all certificates must be printed by a system or site administrator.

- Do not allow users to view their own certificates:

  This option is only available if the 'Allow users to print their own certificates' option has been selected. Selecting this option specifies that members of the site who have qualified for a certificate of achievement or completion for any of the courses that they have studied are not to be allowed to view these certificates themselves. If this option is not selected, the certificates will be sent directly to the printer without being shown on the screen.

New User Settings

Figure 5-9 shows the LMS new user site settings: -

Figure 5-9: Add Site – New User Settings

The following settings can be specified in this category: -

- Auto-generate suggested familiar name:

  Selecting this option specifies that a familiar name will be suggested for new users using the format selected.

- Auto-generate suggested e-mail address:

  Selecting this option specifies that an e-mail address will be suggested for new users using the format selected.

- Auto-generate suggested User ID:

  Selecting this option specifies that a User ID will be suggested for new users using the format selected.

- Use a default password for new users:

  Selecting this option specifies that new user accounts will be created using the specified password.

- Allow new students to self-register:

  This option is only available if the 'Permit Sites to Allow Student Self-Registration' setting is enabled in the LMS System Administration Settings. Selecting this option specifies that new users of the LMS are to be allowed to register themselves as members of the site. If this option is not selected, the user accounts for any new members of the site must be created by a system or site administrator.

- Allow self-registering students to choose a group:

  This option is only available if the 'Allow new students to self-register' option has been selected. Selecting this option specifies that a new LMS user who is registering as a member of the site is to be allowed the choice of joining one or more of the groups that have been defined within the site. If this option is not selected, these users will either be made members of the default group within the site if one has been defined or they will not become members of any of the groups defined within the site.

E-mail Settings

Figure 5-10 shows the LMS site e-mail settings: -

- **Figure 5-10: Add Site – E-mail Settings**

These options are only available if the 'Enable SMTP E-mail' option has been selected in the LMS System Settings. The following settings can be specified in this category: -

- Default 'Reply-to' Address:

  This is the email address from which site emails will appear to be sent. This option is only displayed if the SMTP e-mail options have been configured in the LMS System Administration Settings.

- Allow login reminder emails:

  Selecting this option specifies that members of the new site can request login reminder emails.

- Login reminder email lifetime (hours):

  This setting is only available if the 'Allow login reminder emails' option has been selected. This setting specifies the length of time which can pass after a login reminder email is sent to a member of the new site before the information in the email becomes invalid.

Display Settings

Figure 5-11 shows the LMS site display settings: -

Figure 5-11: Add Site – Display Settings

The following settings can be specified in this category: -

- Show the top-level subject areas:

  Selecting this option specifies that the course list that is displayed to members of the new site should be sub-divided by subject area as well as by course topic. Selecting this option can help to avoid confusion by reducing the number of courses that are simultaneously displayed to members of the site.

- Show the Learning Priorities Tool:

  The Learning Priorities Tool is an LMS function which allows users to prioritise their learning requirements by ranking the relative importance of the course areas that contain the courses which have been made available to them. Selecting this option specifies that this facility is to be made available to members of the new site.

- Show the Learning Methods Tool:

  The Learning Methods Tool is an optional LMS tool which allows users to determine their preferred learning methods by completing a comprehensive questionnaire. This option is only available if the tool has been installed and selecting this option specifies that this facility is to be made available to members of the new site.

- Show the Training Needs Analysis Tool:

  The Training Needs Analysis Tool is an optional LMS tool which allows users to assess their competencies and analyse their learning needs. This option is only available if the tool has been installed and s electing this option specifies that this facility is to be made available to members of the new site.

- Show the Risk Assessment Module:

  The Risk Assessment Module is an optional LMS module which allows LMS administrators to perform various tasks specific to Health and Safety Risk Assessments. This option is only available if the module has been installed and selecting this option specifies that this module is to be made available to administrators of the new site. For more information on this module, see Chapter 9 - Generating Risk Assessment Reports on page 101 of this document.

- Show the border on certificates:

  Selecting this option specifies that the standard border is drawn around the Certificates of Achievement and Completion that are generated for this site. If this option is not selected, the border will not be shown which can be useful for printing the certificates on pre-printed paper. For more information on these certificates, see the Certificate Report section on page 98 of this document.

- Show the logos on certificates:

  This option is only available if the 'Permit Site Certificate Logos' setting is enabled in the LMS System Administration Settings. Selecting this option specifies that the customisable logos are displayed in the Certificates of Achievement and Completion that are generated for this site. For more information on these certificates, see the Certificate Report section on page 98 of this document.

- Launch the courses using the full screen:

  Selecting this option specifies that the window in which a course is to be displayed should use the entire screen area. If this option is not selected, this window will be set to an initial size of 800 x 600 pixels.

- Show a toolbar on the course window:

  Selecting this option specifies that the window in which a course is to be displayed should include the web browser's toolbar.

Security Settings

Figure 5-12 shows the LMS site security settings: -

Figure 5-12: Add Site – Security Settings

The following settings can be specified in this category: -

- Enforce a secure password policy:

  Selecting this option specifies that a secure password policy will be applied to user accounts for members of the site. This option will be automatically selected and cannot be modified if the 'Enforce Secure Password Policy For All Sites' option is selected in the LMS System Administration Settings and the upper and lower limits of each setting are determined by the values entered in the 'Site Password Policy Setting Limits' section of the LMS System Administration Settings. If this option is selected then the following settings are displayed: -

  - Minimum Password Length (characters)
    This setting specifies the minimum number of characters which are required for a valid password.

  - Minimum non-alphanumeric characters
    This setting specifies the minimum number of non-alphanumeric characters (i.e. not letters or numbers) which are required for a valid password.

  - Minimum numeric characters
    This setting specifies the minimum number of numeric characters (i.e. numbers) which are required for a valid password.

  - Minimum capital letters
    This setting specifies the minimum number capital letters which are required for a valid password.

  - Password history length (to prevent re-use)
    This setting specifies the number of previously used passwords which are retained by the LMS in order to prevent an old password from being re-used.

  - Minimum password duration (days)
    This setting specifies the minimum length of time which must elapse after a password is changed before the password can be changed again. This setting is used to prevent multiple password changes intended to circumvent the password history setting.

- Maximum password duration (days)
  This setting specifies the maximum length of time which can elapse after a password is changed before the password must be changed again.

- Account lockout threshold (incorrect attempts)
  This setting specifies the maximum number of incorrect login attempts which can be made for a user account defined in the LMS before the account is locked and cannot be used.

- Account lockout duration (hours)
  This setting specifies the length of time which must elapse after an account has been locked before the account can be used again.

- Notify all Site Administrators of account lockouts
  If this option is selected then all of the user accounts for site members which are members of the Site Administrator role will be notified by email whenever a user account is locked by a password policy. Please note that this option is only functional if the SMTP e-mail options have been configured in the LMS System Administration Settings.

Once the desired options have been selected, the new site is created by clicking on the 'Update' element. You will then be asked if you would like to allocate all of the available courses to the new site. If you choose 'OK', all of the courses that are currently defined within the LMS will be assigned to the new site. If you choose 'Cancel', the new site will be created without any allocated courses.

Deleting a Site

A site is removed from the LMS by selecting the appropriate entry from the list of available sites and then clicking on the 'Delete Site' item in the site management menu. A site can only be removed from the LMS if all of the user accounts corresponding to members of the site have previously been removed.

Generating Usage Reports for a Site

The administration reports menu for a site is accessed by selecting the appropriate entry from the list of available sites and then clicking on the 'Site Usage Reports' item in the site management menu. This menu and the procedure for generating administration reports are explained in Chapter 8 – Generating Administration Reports on page 73 of this document.

Generating a Multi-Site Access Summary Report

An access summary report is generated by selecting one or more sites from the list of available sites and then clicking on the 'Multi-Site Access Summary' item in the site management menu. In order to generate an access summary report, it is first necessary to specify the date period in which user activity is to be reported on for the selected sites. Figure 5-13 shows the multi-site access summary options dialog: -

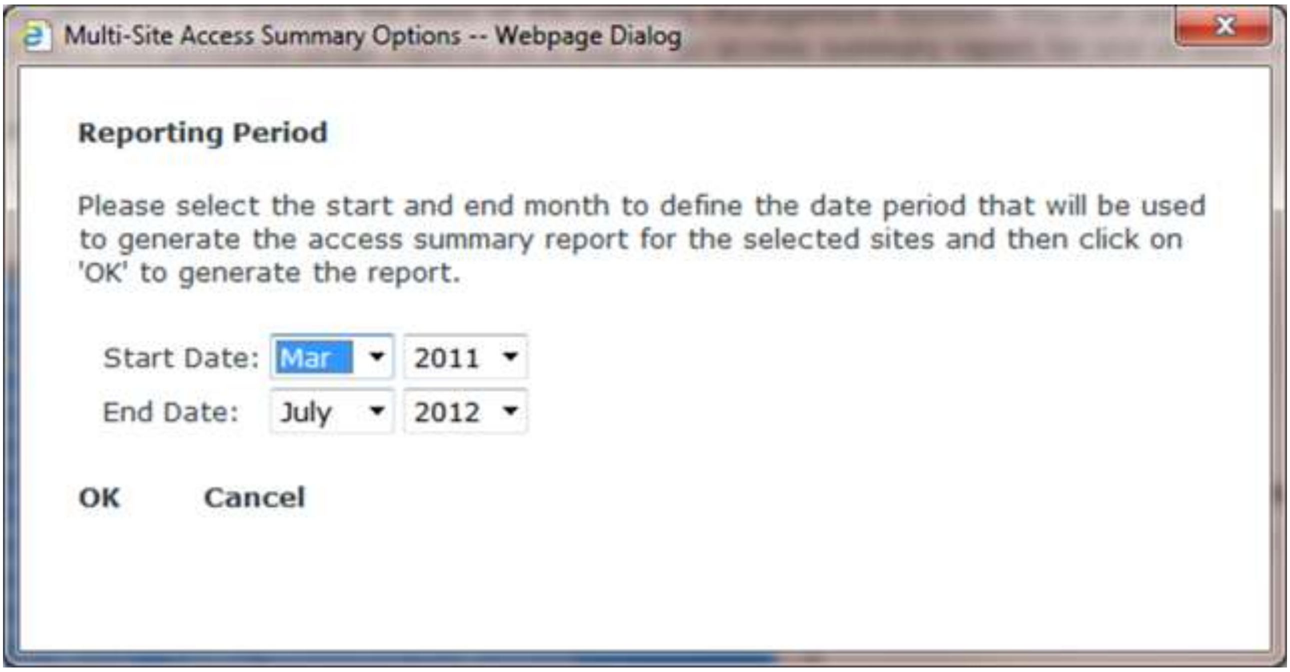


Figure 5-13: Multi-Site Access Summary Options Dialog

The multi-site access summary options dialog consists of a drop-down list of start months and years and end months and years. The start date is initially set to be the earliest date for which usage records have been recorded for the selected sites and the end date is initially set to be the current date. When the desired date period has been selected, the multi-site access summary report is generated by clicking on the 'OK' element. Figure 5-14 shows a sample multi-site access summary report: -

Close | Print | Save | E-mail | Export

Administration Reports
Multi Site Access Summary

Report Generated By: Tim Harding at 12:14:55 on 25 July 2012
Report Options: Start Date: Mar 2011; End Date: July 2012.

Site Title	Active Users	Courses Accessed	Average Courses per User	Duration of Use (hh:mm:ss)
[illegible]	1	2	2	01:02:02
[illegible]	1	1	1	00:03:25
[illegible]	7	23	3.3	11:37:28
[illegible]	5	13	2.6	02:50:24
[illegible]	6	68	11.3	10:16:12
[illegible]	1	34	34	10:21:04
[illegible]	3	50	16.7	12:10:10
[illegible]	1	40	40	32:48:19
[illegible]	13	70	5.4	29:20:01
[illegible]	1	5	5	00:09:56
[illegible]	5	14	2.8	04:01:47
[illegible]	2	10	5	06:11:53
[illegible]	3	25	8.3	02:56:09
[illegible]	14	23	1.6	05:03:53
[illegible]	5	11	2.2	00:25:09
[illegible]	4	32	8	21:02:46
[illegible]	1	105	105	03:28:34
Totals:	73	526	7.2	153:49:12

Figure 5-14: Sample Multi-Site Access Summary Report

A multi-site access summary report shows the following information for each of the selected sites for which usage data has been recorded during the reporting period: -

- The total number of user that have been active (i.e. that have accessed one or more courses) during the reporting period.
- The total number of courses that have been accessed by the active users during the reporting period.
- The average number of courses that have been accessed by each user during the reporting period (i.e. the number of courses accessed / the number of active users).
- The total length of time during the reporting period that the active users have spent accessing the courses.

These values are also totalled across all of the selected sites at the end of the report.

Generating a Site Member Summary Report

A site member summary report is generated by selecting one or more sites from the list of available sites and then clicking on the 'Site Member Summary' item in the site management menu. Figure 5-15 shows a sample site member summary report: -

Close | Print | Save | E-mail | Export

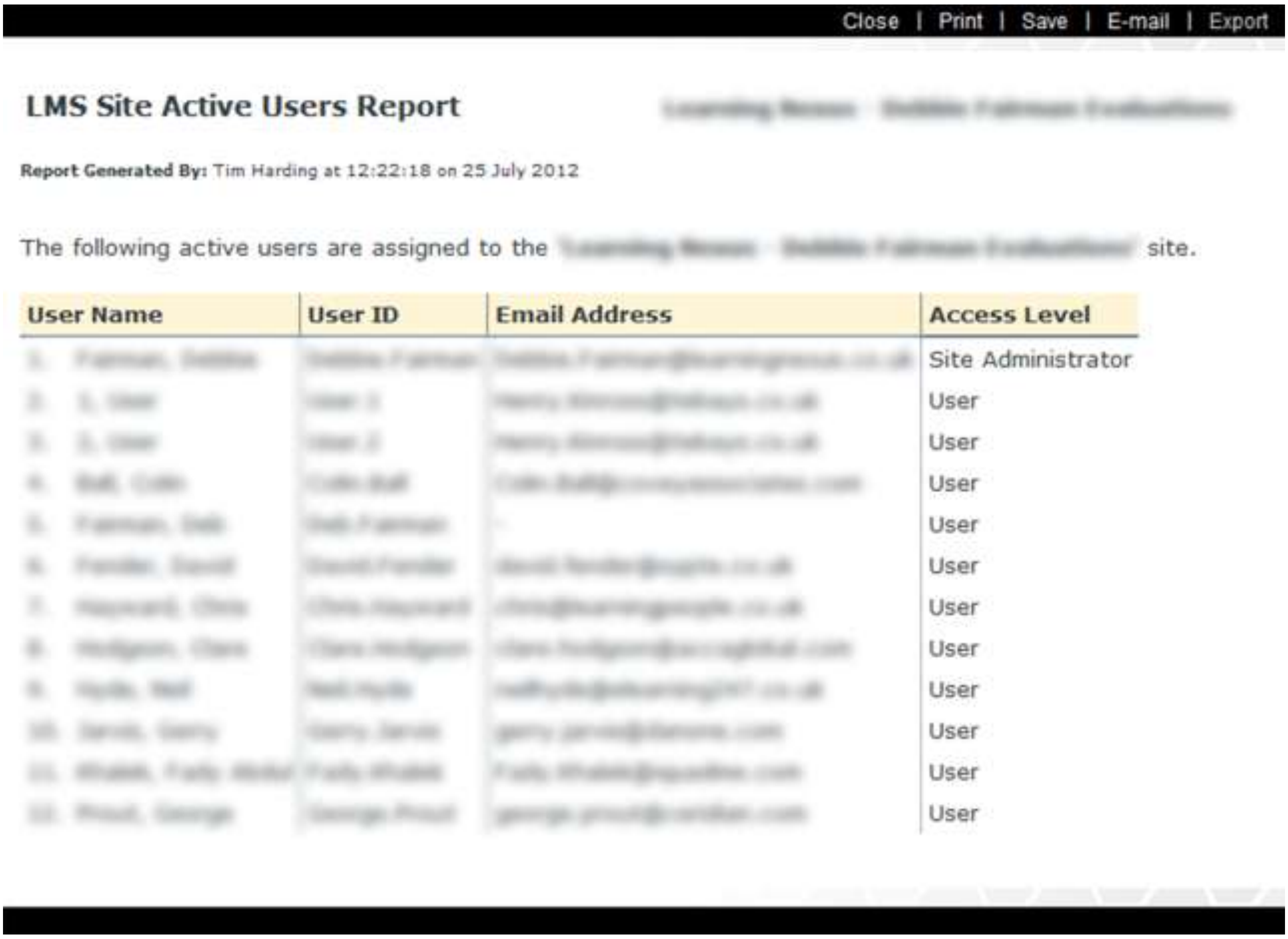
LMS Site Membership Summary Report

Report Generated By: Tim Harding at 12:18:44 on 25 July 2012

Site Title	Active Users	Retired Users	Active Courses	Retired Courses
[illegible]	0	0	873	7
[illegible]	25	0	873	6
[illegible]	1	0	873	9
[illegible]	2	0	873	7
[illegible]	2	0	873	7
[illegible]	2	0	873	12
[illegible]	14	0	873	7
[illegible]	9	0	873	65
[illegible]	77	1	873	14
[illegible]	26	1	873	12
[illegible]	12	0	873	8
[illegible]	12	0	868	9
[illegible]	63	83	870	10
[illegible]	2	0	868	7
[illegible]	64	38	873	12
[illegible]	19	0	873	9
[illegible]	11	0	873	9
[illegible]	1	0	873	7
[illegible]	72	0	873	70
[illegible]	1	0	873	7
[illegible]	13	0	873	7
[illegible]	8	0	873	7
[illegible]	1	0	863	61
Totals:	**437**	**123**	**20056**	**369**

Figure 5-15: Sample Site Member Summary Report

The site member summary report shows the number of users and courses which have been assigned to each of the selected sites. A site users report can be generated by clicking on the icon in the 'Users' columns of the report and a site courses report can be generated by clicking on the icon in the 'Courses' columns of the report. Figure 5-16 shows a sample site users report: -


Close | Print | Save | E-mail | Export

LMS Site Active Users Report

Report Generated By: Tim Harding at 12:22:18 on 25 July 2012

The following active users are assigned to the [illegible] site.

User Name	User ID	Email Address	Access Level
[illegible]	[illegible]	[illegible]	Site Administrator
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User

Figure 5-16: Sample Site Users Report

Viewing the System Event Log

The LMS system event log is accessed by optionally selecting one or more sites from the list of those available and then clicking on the 'View the Event Log' item in the site management menu. The system event log shows system events generated by user accounts defined in the LMS which are members of the System Administrator role or members of the selected site(s).

Figure 5-17 shows a sample system event log: -

Close | Print | Save | E-mail | Export

Administration Reports
System Event Log

Report Generated By: Tim Harding at 12:26:22 on 25 July 2012

System Administrators

User Name	Event	Date / Time	Source
[illegible]	Successful Login	25/07/2012 12:13:02	192.168.0.2
[illegible]	Successful Login	25/07/2012 11:48:36	192.168.0.2
[illegible]	Failed Login - Bad Password	25/07/2012 11:48:32	192.168.0.2
[illegible]	Failed Login - Bad Password	25/07/2012 11:48:28	192.168.0.2
[illegible]	Successful Login	25/07/2012 08:37:18	81.138.21.135

[illegible]

User Name	Event	Date / Time	Source
[illegible]	Successful Login	25/07/2012 11:12:18	80.45.150.15
[illegible]	Successful Login	17/07/2012 15:19:37	213.131.101.70
[illegible]	Successful Login	15/07/2012 17:06:32	176.24.204.42
[illegible]	Successful Login	04/07/2012 11:48:50	80.45.150.15
[illegible]	Successful Login	03/07/2012 07:58:09	176.24.204.42
[illegible]	Successful Login	02/07/2012 17:22:45	176.24.204.42

[illegible]

User Name	Event	Date / Time	Source
[illegible]	Successful Login	23/07/2012 15:46:30	92.22.36.246
[illegible]	Failed Login - Bad Password	23/07/2012 15:46:25	92.22.36.246
[illegible]	Failed Login - Bad Password	23/07/2012 15:46:20	92.22.36.246
[illegible]	Successful Login	22/07/2012 13:22:51	81.155.76.154

Figure 5-17: Sample System Event Log Report

Managing Courses

The LMS course management menu is accessed by clicking on the 'Manage Courses' item in the System Administration Menu. Figure 5-18 shows the course management menu: -

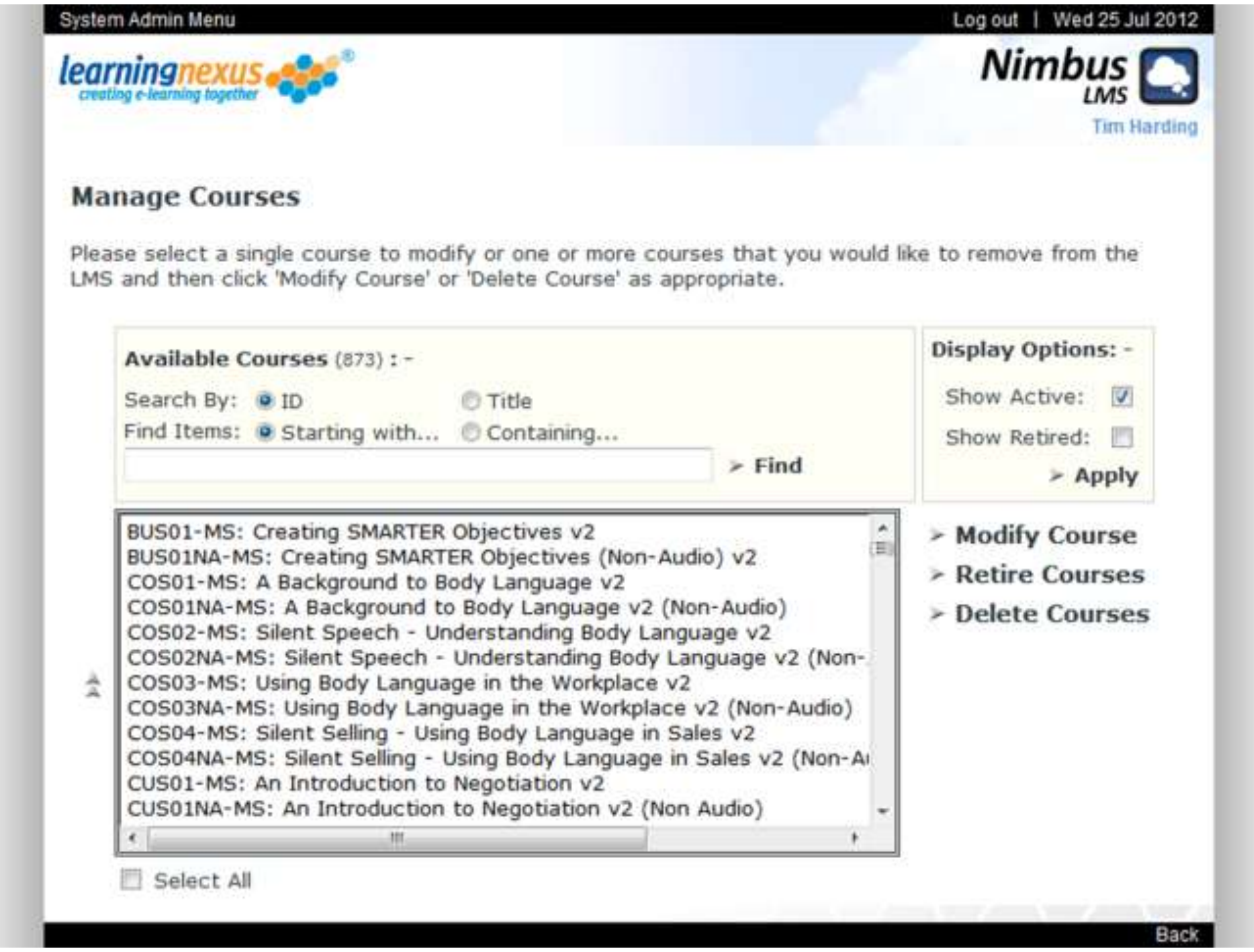


Figure 5-18: Manage Courses Menu

The course management menu consists of a list of all of the courses that are currently defined within the LMS, options to display active and retired courses, an option to select all of the courses and a menu of course management functions: -

- Modify Course
- Retire Courses
- Activate Courses
- Delete Courses

The courses are shown using the ID specified for the course and then the course title and are listed alphabetically. The courses in the list can be located by using the 'Available Courses' box and can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations.

Each of the course management functions are explained in detail below: -

Modifying a Course

The LMS course modification section is accessed by selecting a single course from the list of those available and then clicking on the 'Modify Course' item in the course management menu.

Figure 5-19 shows the course modification section: -

Figure 5-19: Course Modification Section

The LMS course modification section contains a table with one row for each of the lessons that are defined within the course that is being modified. Each row of this table consists of three columns: -

- Lesson Title

  This is the title of the lesson whose settings are defined in the other two columns of the row.

- Launch URL

  The text in this field specifies the URL (Universal Resource Locator) of the web page that is used to launch the lesson. This value is normally set when the course is initially installed or imported into the LMS and will usually only need to be modified if the content files for the lesson are physically relocated.

  If the course was imported into the LMS as 'non-standard' content then each lesson in the table will also contain a checkbox labelled 'Require a Completion Acknowledgement'. Checking this box requires users to acknowledge that they have fully read and understood the lesson contents before being allowed to mark the lesson as completed.

- Mastery Score

  If the lesson contains a section that has an associated score such as an exercise or test, the number in this field specifies the percentage value that is used to determine if a particular score is sufficient for the student to pass the lesson. If the lesson does not have an associated score, this column contains the text N/A.

When the desired changes have been made to the settings for each lesson, the modifications are confirmed by clicking on the 'Update' element.

Retiring Courses

If the ‘Show Active’ checkbox is selected in the ‘Display Options’ box then one or more active courses can be retired by selecting the appropriate course entries from the list of available courses and then clicking on the ‘Retire Courses’ item in the course management menu.

NOTE: when a course is retired, the course is hidden from the list of available courses which is displayed to users but the learning activity data that is associated with the course is retained and can be reported on by LMS Administrators and Group Managers.

Activating Courses

If the ‘Show Retired’ checkbox is selected in the ‘Display Options’ box then one or more previously retired courses can be re-activated by selecting the appropriate course entries from the list of available courses and then clicking on the ‘Activate Courses’ item in the course management menu.

Deleting Courses

One or more courses can be removed from the LMS by selecting the appropriate course entries from the list of available courses and then clicking on the ‘Delete Courses’ item in the course management menu.

NOTE: when a course is deleted from the LMS, all of the learning activity data that is associated with that course is also permanently deleted.

Managing System Administrators

The LMS system administrator account management menu is accessed by clicking on the 'Manage Administrators' item in the System Administration Menu. Figure 5-20 shows the system administrator account management menu: -

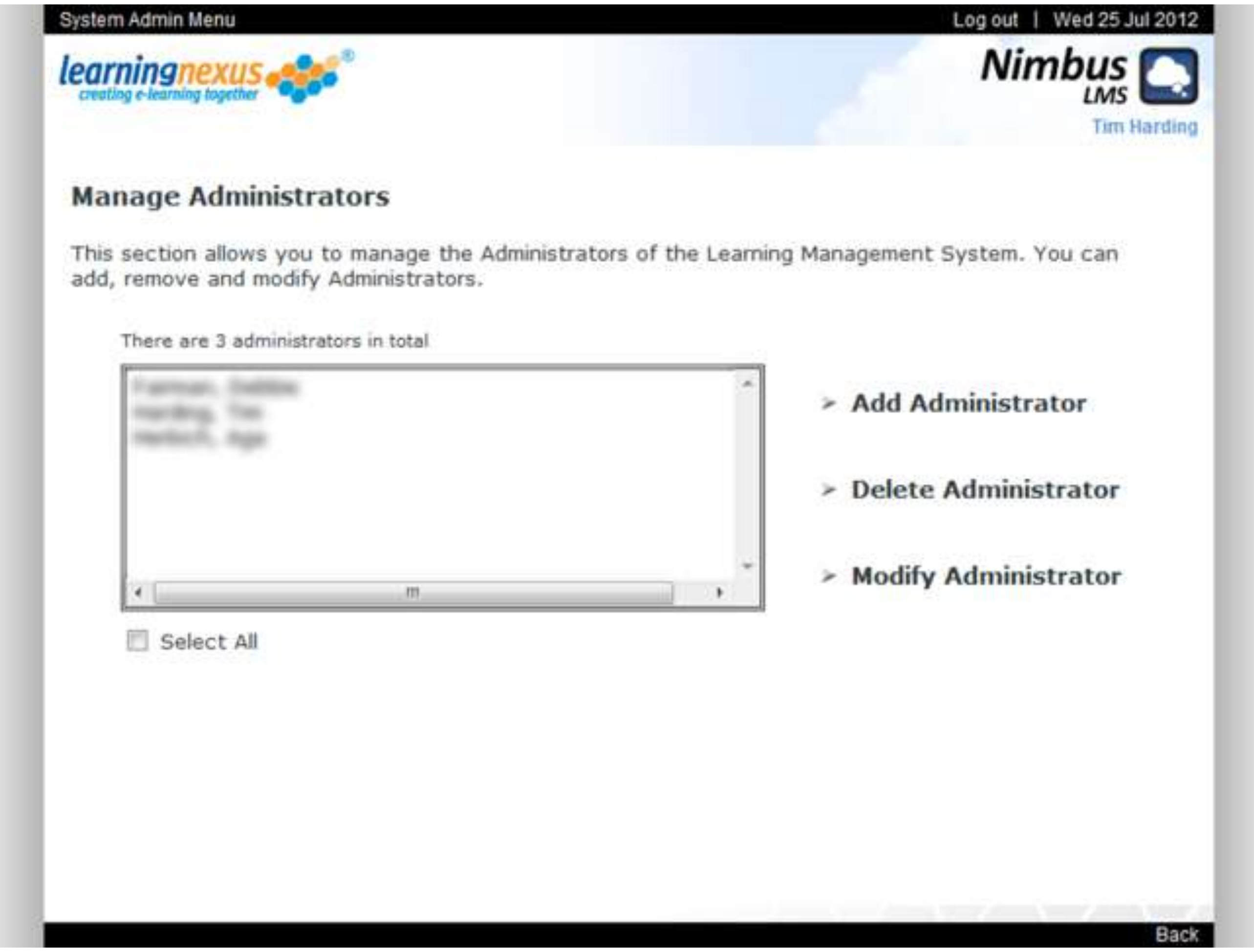


Figure 5-20: System Administrator Account Management Menu

The system administrator account management menu consists of a list of the system administrators that are currently defined within the LMS, an option to select all of the items in the list and a menu of management functions: -

- Add Administrator
- Delete Administrator
- Modify Administrator

The system administrators are displayed using the format {Surname}, {Forename} {Initial} and are listed alphabetically. The entries in the list can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations.

Each of the management functions are explained in detail below: -

Adding an Administrator

The section of the LMS that is used to create a new system administrator account is accessed by clicking on the 'Add Administrator' item in the system administrator account management menu. Figure 5-21 shows the system administrator account creation section: -

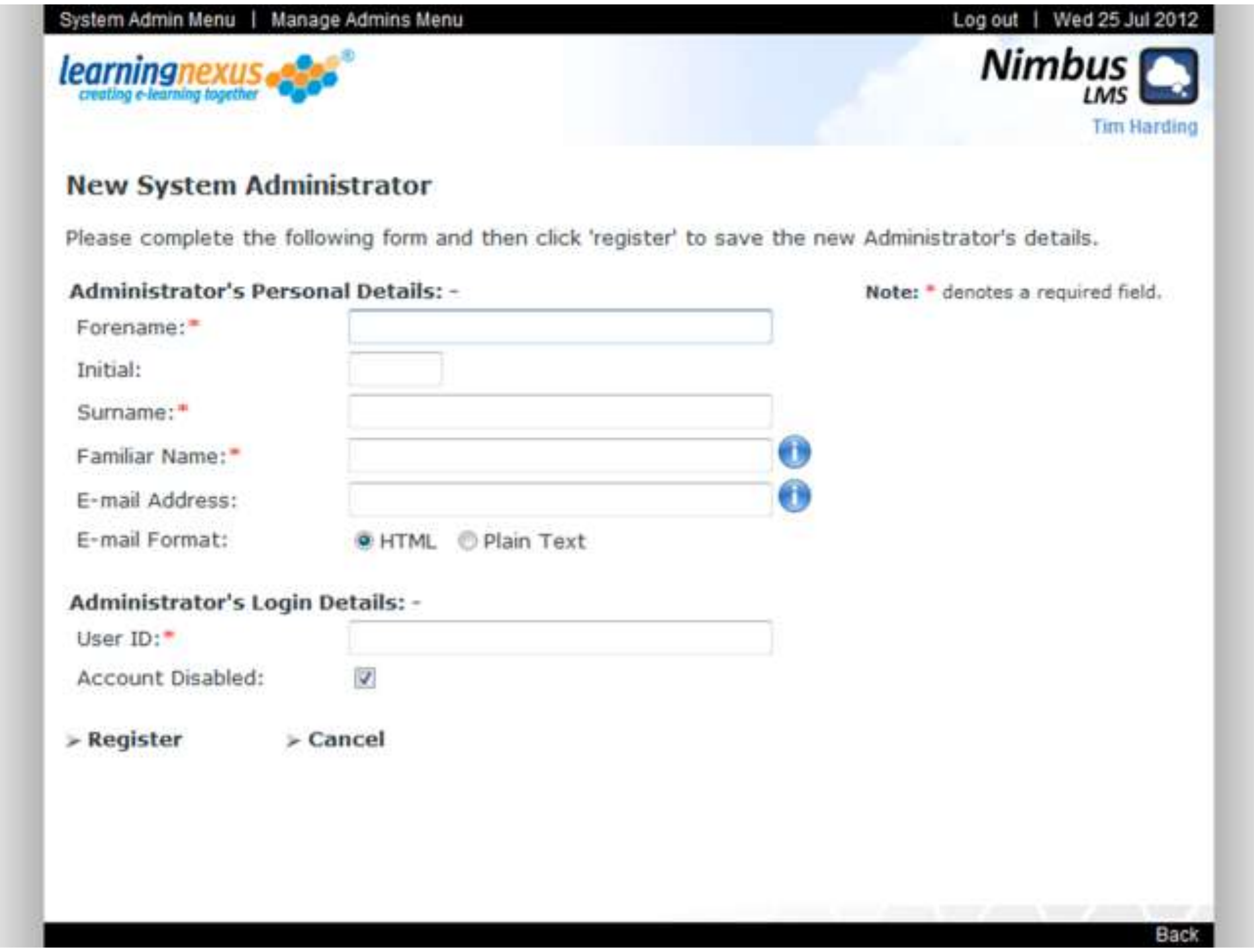


Figure 5-21: Add Administrator Section

The system administrator account creation section contains two groups of settings for the new system administrator account: -

Administrator's Personal Details: -

- <u>Forename</u>

  This is the first name of the system administrator.

- <u>Initial</u>

  This is the middle initial of the system administrator (if appropriate).

- <u>Surname</u>

  This is the last name of the system administrator.

- <u>Familiar Name</u>

  This is the informal name by which the system administrator prefers to be called. This entry is the name that is displayed on the menu navigation bar of the LMS user interface.

- E-mail Address

  This is the email address by which the system administrator prefers to be contacted. This setting is only displayed if the SMTP e-mail options have been configured in the LMS System Administration Settings.

- E-mail Format

  This is the format in which emails sent to the system administrator will be constructed. This setting is only displayed if the SMTP e-mail options have been configured in the LMS System Administration Settings.

Administrator's Login Details: -

- User ID

  This is the entry that must be made by the system administrator in the User ID box on the login page of the LMS. This entry is not case sensitive.

- Account Disabled

  Selecting this option specifies that the user account will be created in a disabled state and cannot be used until it has been reset by an LMS system administrator. If this option is not selected then an automatically generated, single use password is displayed which must be used by the new system administrator to login to the LMS for the first time. A link to copy this password to the system clipboard is also displayed.

When the appropriate values have been entered for the details of the new system administrator, the account is created by clicking on the 'Register' link.

Deleting an Administrator

One or more system administrator accounts can be removed from the LMS by selecting the appropriate entries from the list of available system administrator accounts and then clicking on the 'Delete Administrator' item in the system administrator account management menu.

Modifying an Administrator

The section of the LMS that is used to modify a system administrator account is accessed by selecting a single entry from the list of available system administrator accounts and then clicking on the 'Modify Administrator' item in the system administrator account management menu.

Figure 5-22 shows the system administrator account modification section: -

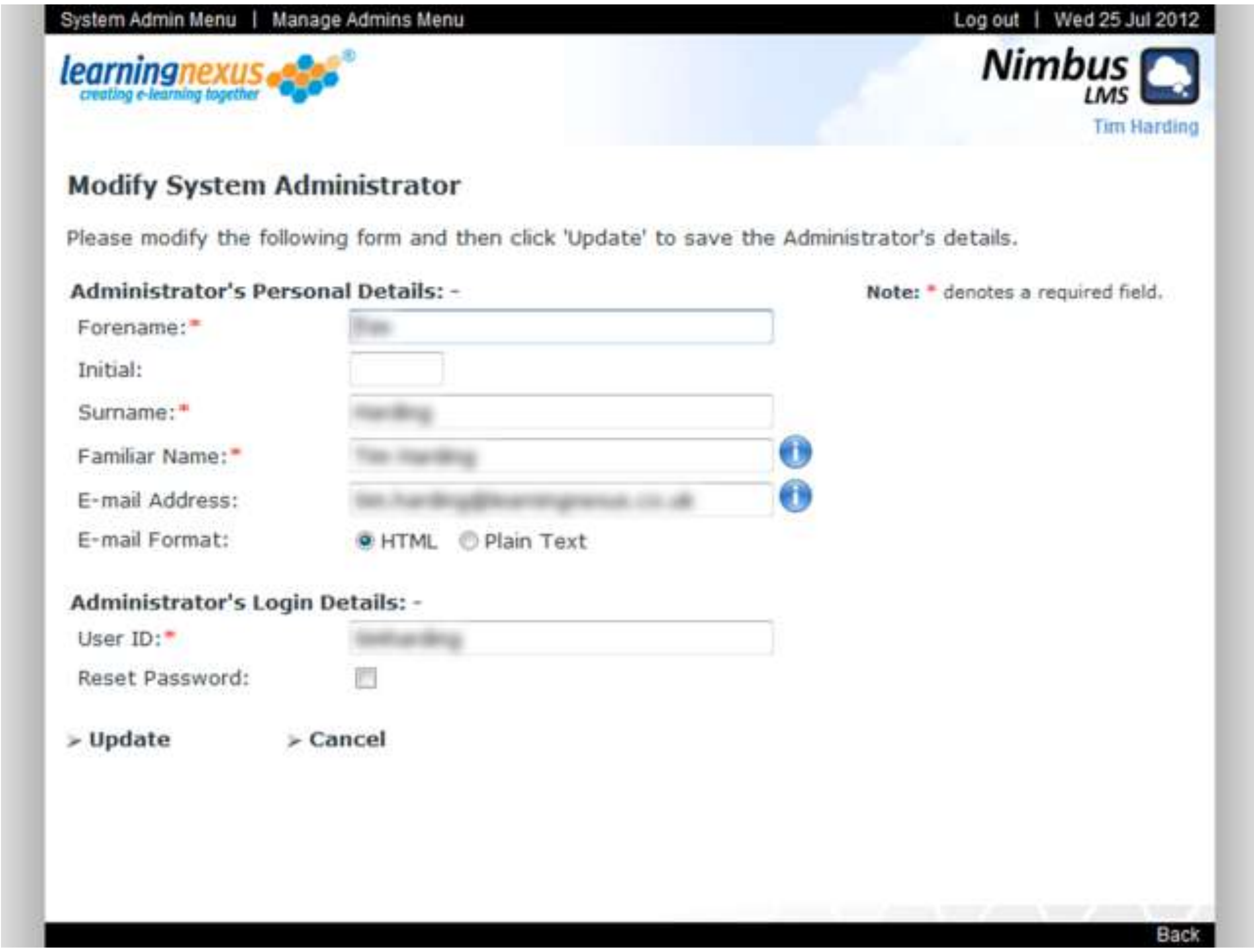


Figure 5-22: Modify Administrator Section

This section contains the same sets of settings as those described in the

Adding an Administrator section on page 37 of this document with the addition of an option to reset the password. If this option is selected then an automatically generated, single use password is displayed which must be used by the new system administrator to login to the LMS the next time. A link to copy this password to the system clipboard is also displayed. On first entering this section, these settings contain the entries that are currently defined for the selected system administrator account.

When the settings have been changed to the desired entries, the modified details of the system administrator are saved by clicking on the ‘Update’ link.

6. Site Administrator Tasks

The main menu of the LMS contains the additional 'Administration' menu item when the currently logged-on user is a site administrator.

Figure 6-1 shows the main menu that is displayed for a site administrator: -

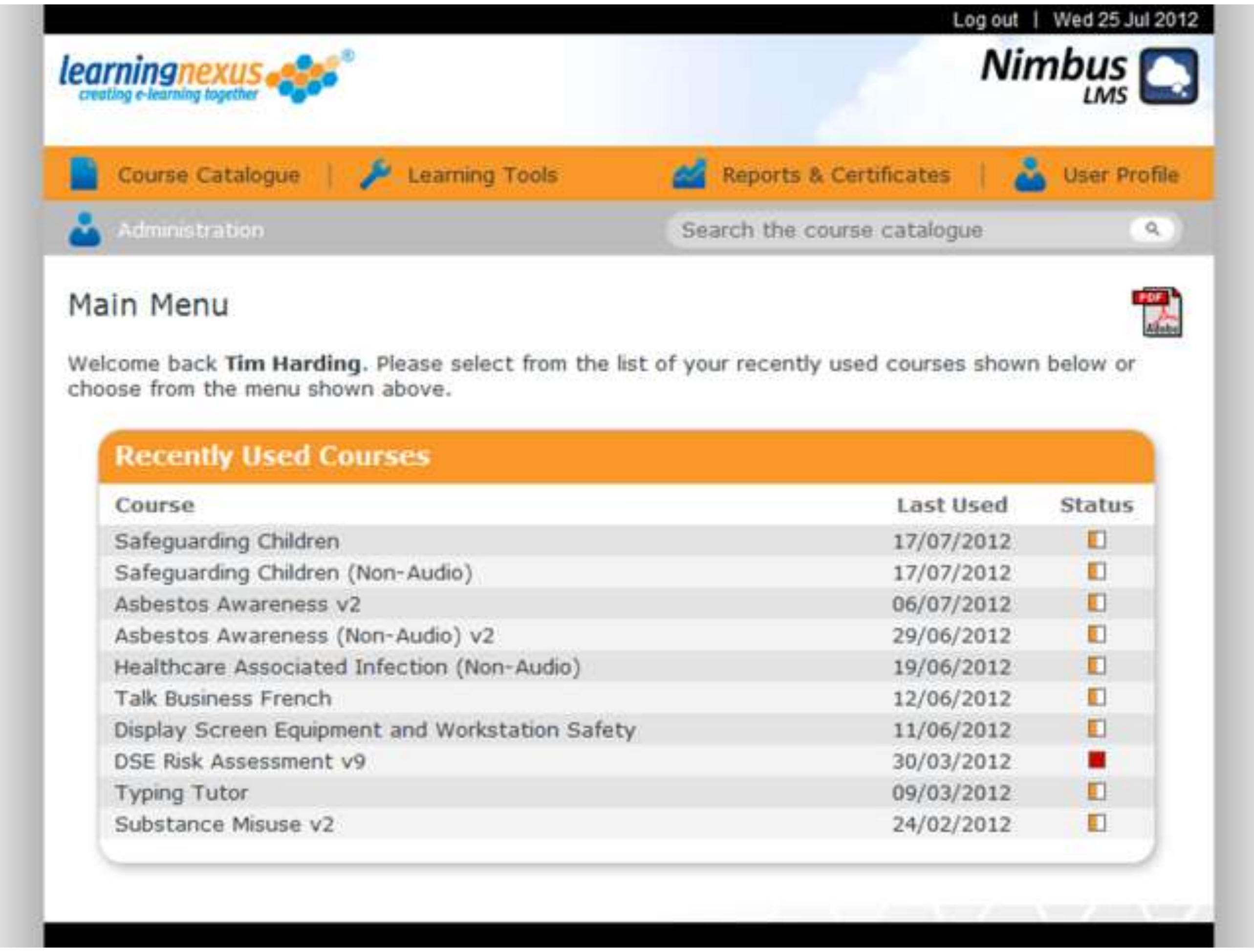


Figure 6-1: Main Menu for a Site Administrator

Please note that clicking on the 'Adobe PDF' icon will open the Site Administrator's Guide in a new window.

The site administration menu is accessed by clicking on the 'Administration' item in the LMS main menu.

Figure 6-2 shows the site administration menu: -

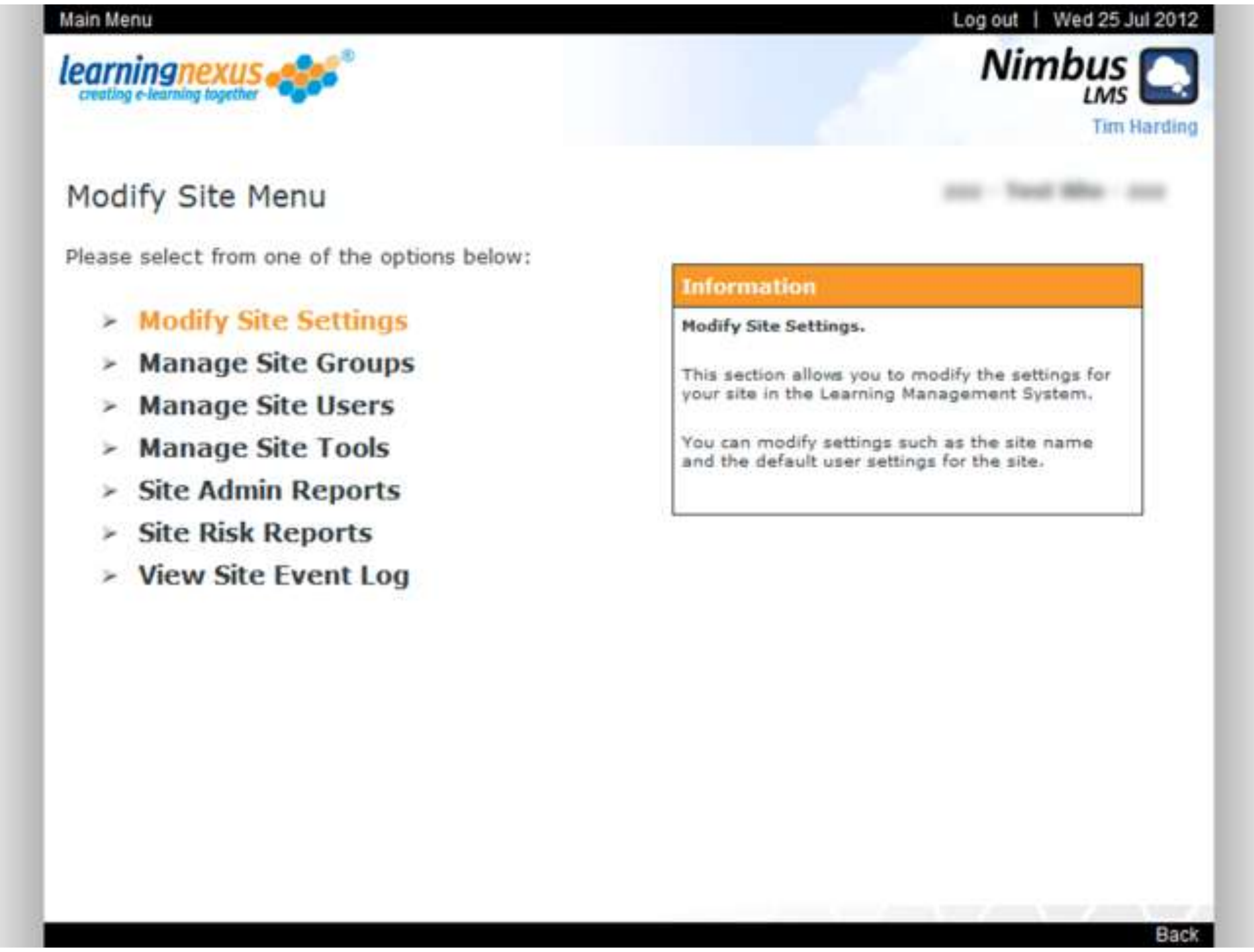


Figure 6-2: Site Administration Menu

The site administration menu consists of seven possible functions: -

- Modify Site Settings
- Manage Site Groups
- Manage Site Users
- Manage Site Tools
- Site Admin Reports
- Site Risk Reports
- View Site Event Log

Each of these functions is explained in detail below: -

Modifying Site Settings

The site settings modification section is accessed by clicking on the 'Modify Site Settings' item in the site administration menu and is arranged in five categories: -

- General Settings
- New User Settings
- E-Mail Settings
- Display Settings
- Security Settings

Each of these categories is explained in detail below: -

General Settings

Figure 6-3 shows the LMS general site settings: -

Figure 6-3: Modify Site – General Settings

The following settings can be specified in this category: -

- <u>Site Title:</u>

  This is the name of the site that will be used within the LMS

- <u>Restrict the number of users:</u>

  Selecting this option specifies that the number of user accounts that may exist within the site at any one time is to have an upper limit. This setting will be displayed to a Site Administrator but can only be modified by a System Administrator.

- <u>Limit the number of users to:</u>

  This option is only displayed if the previous option is selected. The number entered in this box specifies the maximum number of user accounts that may exist within the site at any one time. This setting will be displayed to a Site Administrator but can only be modified by a System Administrator.

- <u>Allow Site Administrators to delete users:</u>

  This option specifies whether or not Site Administrators defined in the site are permitted to delete user accounts. This setting will be displayed to a Site Administrator but can only be modified by a System Administrator.

- Calculate Assessment Achievement Using:

  This option determines how the achievement status is determined for scored lessons defined within LMS courses. The available options are: -

  - Best Score
    The achievement status is calculated using the best score achieved by a user across all of their usage attempts.

  - Last Score
    The achievement status is calculated using the most recent score achieved by a user.

- Allow users to print their own certificates:

  Selecting this option specifies that members of the site who have qualified for a certificate of achievement or completion for any of the courses that they have studied are to be allowed to view and print these certificates themselves. If this option is not selected, all certificates must be printed by a System Administrator, Site Administrator or Group Manager.

- Do not allow users to view their own certificates:

  This option is only available if the 'Allow users to print their own certificates' option has been selected. Selecting this option specifies that members of the site who have qualified for a certificate of achievement or completion for any of the courses that they have studied are not to be allowed to view these certificates themselves. If this option is not selected, the certificates will be sent directly to the printer without being shown on the screen.

New User Settings

Figure 6-4 shows the LMS new user site settings: -

Figure 6-4: Modify Site – New User Settings

The following settings can be specified in this category: -

- Auto-generate suggested familiar name:

  Selecting this option specifies that a familiar name will be suggested for new users using the format selected.

- Auto-generate suggested e-mail address:

  Selecting this option specifies that an e-mail address will be suggested for new users using the format selected.

- Auto-generate suggested User ID:

  Selecting this option specifies that a User ID will be suggested for new users using the format selected.

- Use a default password for new users:

  Selecting this option specifies that new user accounts will be created using the specified password.

- Allow new students to self-register:

  This option is only available if the 'Permit Sites to Allow Student Self-Registration' setting is enabled in the LMS System Administration Settings. Selecting this option specifies that new users of the LMS are to be allowed to register themselves as members of the site. If this option is not selected, the user accounts for any new members of the site must be created by a system or site administrator.

- Allow self-registering students to choose a group:

  This option is only available if the 'Allow new students to self-register' option has been selected. Selecting this option specifies that a new LMS user who is registering as a member of the site is to be allowed the choice of joining one or more of the groups that have been defined within the site. If this option is not selected, these users will either be made members of the default group within the site if one has been defined or they will not become members of any of the groups defined within the site.

E-mail Settings

Figure 6-5 shows the LMS site e-mail settings: -

Figure 6-5: Modify Site – E-mail Settings

These options are only available if the 'Enable SMTP E-mail' option has been selected in the LMS System Settings. The following settings can be specified in this category: -

- Default 'Reply-to' Address:

  This is the email address from which site emails will appear to be sent.

- Allow login reminder emails:

  Selecting this option specifies that members of the site can request login reminder emails.

- Login reminder email lifetime (hours):

  This setting is only available if the 'Allow login reminder emails' option has been selected. This setting specifies the length of time which can pass after a login reminder email is sent to a member of the site before the information in the email becomes invalid.

Display Settings

Figure 6-6 shows the LMS site display settings: -

Figure 6-6: Modify Site – Display Settings

The following settings can be specified in this category: -

- Show the top-level subject areas:

  Selecting this option specifies that the course list that is displayed to members of the site should be sub-divided by subject area as well as by course topic. Selecting this option can help to avoid confusion by reducing the number of courses that are simultaneously displayed to members of the site.

- Show the Learning Priorities Tool:

  The Learning Priorities Tool is an LMS function which allows users to prioritise their learning requirements by ranking the relative importance of the course areas that contain the courses which have been made available to them. Selecting this option specifies that this facility is to be made available to members of the site.

- Show the Learning Methods Tool:

  The Learning Methods Tool is an optional LMS tool which allows users to determine their preferred learning methods by completing a comprehensive questionnaire. This option is only available if the tool has been installed and selecting this option specifies that this facility is to be made available to members of the site. This setting will be displayed to a Site Administrator but can only be modified by a System Administrator.

- Show the Training Needs Analysis Tool:

  The Training Needs Analysis Tool is an optional LMS tool which allows users to assess their competencies and analyse their learning needs. This option is only available if the tool has been installed and selecting this option specifies that this facility is to be made available to members of the site. This setting will be displayed to a Site Administrator but can only be modified by a System Administrator.

- Show the Risk Assessment Module:

  The Risk Assessment Module is an optional LMS module which allows LMS administrators to perform various tasks specific to Health and Safety Risk Assessments. This option is only available if the module has been installed and selecting this option specifies that this module is to be made available to administrators of the site. This setting will be displayed to a Site Administrator but can only be modified by a System Administrator. For more information on this module, see Chapter 9 - Generating Risk Assessment Reports on page 101 of this document.

- Show the border on certificates:

  Selecting this option specifies that the standard border is drawn around the Certificates of Achievement and Completion that are generated for this site. If this option is not selected, the border will not be shown which can be useful for printing the certificates on pre-printed paper. For more information on these certificates, see the Certificate Report section on page 98 of this document.

- Show the logos on certificates:

  This option is only available if the 'Permit Site Certificate Logos' setting is enabled in the LMS System Administration Settings. Selecting this option specifies that the customisable logos are displayed in the Certificates of Achievement and Completion that are generated for this site. For more information on these certificates, see the Certificate Report section on page 98 of this document.

- Launch the courses using the full screen:

  Selecting this option specifies that the window in which a course is to be displayed should use the entire screen area. If this option is not selected, this window will be set to an initial size of 800 x 600 pixels.

- Show a toolbar on the course window:

  Selecting this option specifies that the window in which a course is to be displayed should include the web browser's toolbar.

Security Settings

Figure 6-7 shows the LMS site security settings: -

Figure 6-7: Modify Site – Security Settings

The following settings can be specified in this category: -

- Enforce a secure password policy:

  Selecting this option specifies that a secure password policy will be applied to user accounts for members of the site. This option will be automatically selected and cannot be modified if the 'Enforce Secure Password Policy For All Sites' option is selected in the LMS System Administration Settings and the upper and lower limits of each setting are determined by the values entered in the 'Site Password Policy Setting Limits' section of the LMS System Administration Settings. If this option is selected then the following settings are displayed: -

  - Minimum Password Length (characters)
    This setting specifies the minimum number of characters which are required for a valid password.

  - Minimum non-alphanumeric characters
    This setting specifies the minimum number of non-alphanumeric characters (i.e. not letters or numbers) which are required for a valid password.

  - Minimum numeric characters
    This setting specifies the minimum number of numeric characters (i.e. numbers) which are required for a valid password.

  - Minimum capital letters
    This setting specifies the minimum number capital letters which are required for a valid password.

  - Password history length (to prevent re-use)
    This setting specifies the number of previously used passwords which are retained by the LMS in order to prevent an old password from being re-used.

  - Minimum password duration (days)
    This setting specifies the minimum length of time which must elapse after a password is changed before the password can be changed again. This setting is used to prevent multiple password changes intended to circumvent the password history setting.

- Maximum password duration (days)
  This setting specifies the maximum length of time which can elapse after a password is changed before the password must be changed again.

- Account lockout threshold (incorrect attempts)
  This setting specifies the maximum number of incorrect login attempts which can be made for a user account defined in the LMS before the account is locked and cannot be used.

- Account lockout duration (hours)
  This setting specifies the length of time which must elapse after an account has been locked before the account can be used again.

- Notify all Site Administrators of account lockouts
  If this option is selected then all of the user accounts for site members which are members of the Site Administrator role will be notified by email whenever a user account is locked by a password policy. Please note that this option is only functional if the SMTP e-mail options have been configured in the LMS System Administration Settings.

Once the settings to be applied to the site have been modified, the changes are confirmed by clicking on the ‘Update’ element.

Managing Site Groups

The manage site groups menu is accessed by clicking on the 'Manage Site Groups' item in the site administration menu.

Figure 6-8 shows the manage site groups menu: -

Figure 6-8: Manage Site Groups Menu

The manage site groups menu consists of a list of all of the groups that are currently defined within the site, an option to select all of the items in the list and a menu of group management functions: -

- Set as Default
- Add Group
- Delete Group
- Modify Group
- Group Member Summary
- Group Admin Reports

The currently defined groups are listed alphabetically and the entries in the list can be located using the 'Find Items' box and can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations.

Each of the group management functions are explained in detail below: -

Setting the Default Group

The default group is the group which new users of the site are automatically made members of unless they or the LMS administrator who is creating the new user account specify otherwise. If the default group is not set, new users of the site will not be made a member of any of the defined groups unless they or the LMS administrator who is creating the new user account specify otherwise.

The default group is set by selecting a single entry from the list of available groups and then clicking on the 'Set as Default' item in the manage site groups menu. The default group is removed by not selecting any of the entries from the list of available groups and then clicking on the 'Set as Default' item in the manage site groups menu.

Adding a Group

The new site group section is accessed by clicking on the 'Add Group' item in the manage site groups menu.

Figure 6-9 shows the new site group section: -

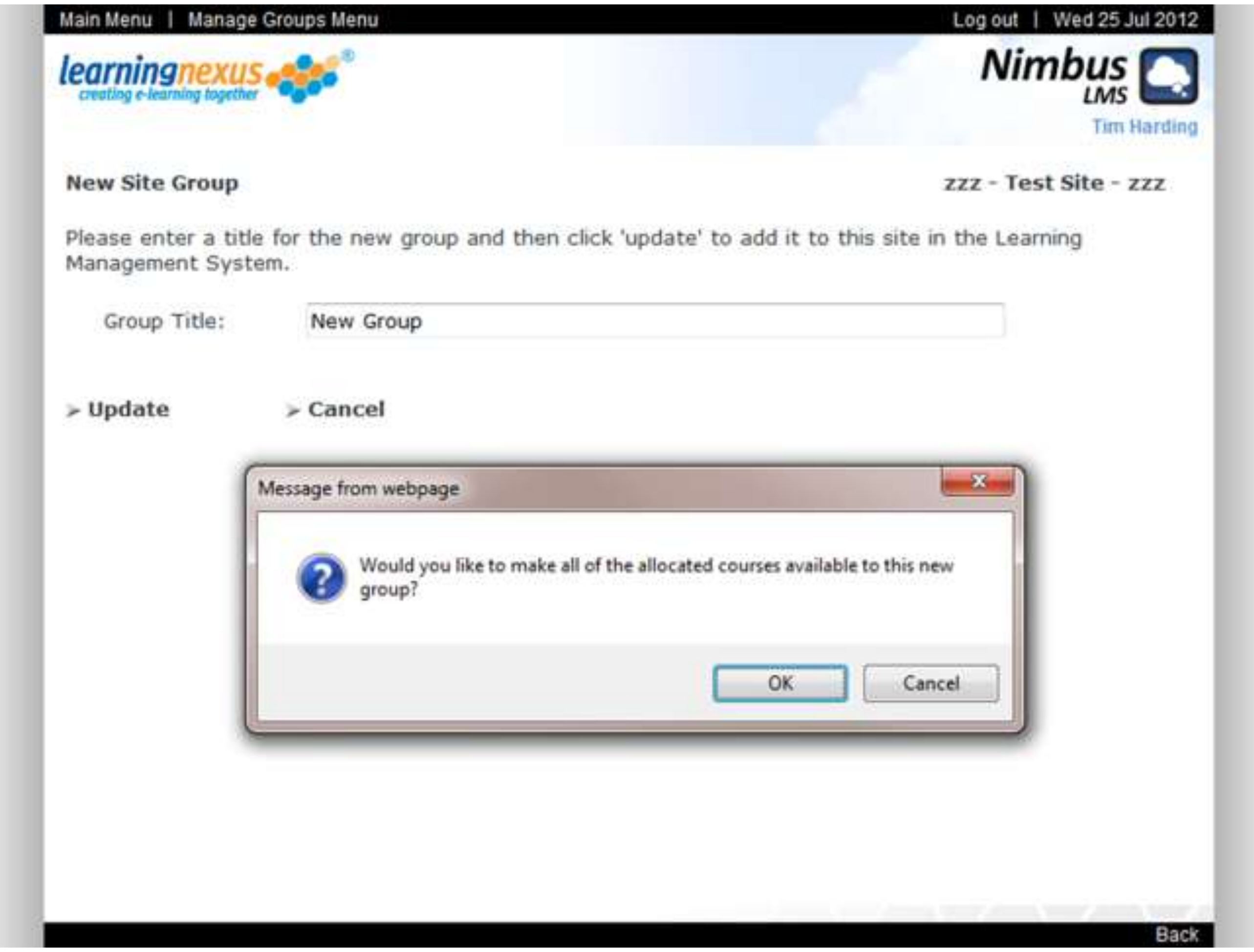


Figure 6-9: New Site Group Section

The new site group section consists of a text box into which the title of the group to be created is entered. When the group title has been entered, the new group is created by clicking on the 'Update' element. You will then be asked if you would like to make all of the allocated courses available to the new group. If you choose 'OK', all of the courses that are currently assigned to the site will be allocated to the new group. If you choose 'Cancel', the new group will be created without any assigned courses.

Deleting a Group

One or more groups can be removed from the site by selecting the appropriate entries from the list of available groups and then clicking on the 'Delete Group' item in the manage site groups menu. A group can only be deleted from a site if all of the user accounts that are members of the group have previously been removed from the group. If the group being deleted is the default group for the site, you will receive a warning informing you that there is currently no default group.

Modifying a Group

The modify group menu is accessed by selecting a single entry from the list of available groups and then clicking on the 'Modify Group' item in the manage site groups menu.

Figure 6-10 shows the modify group menu: -

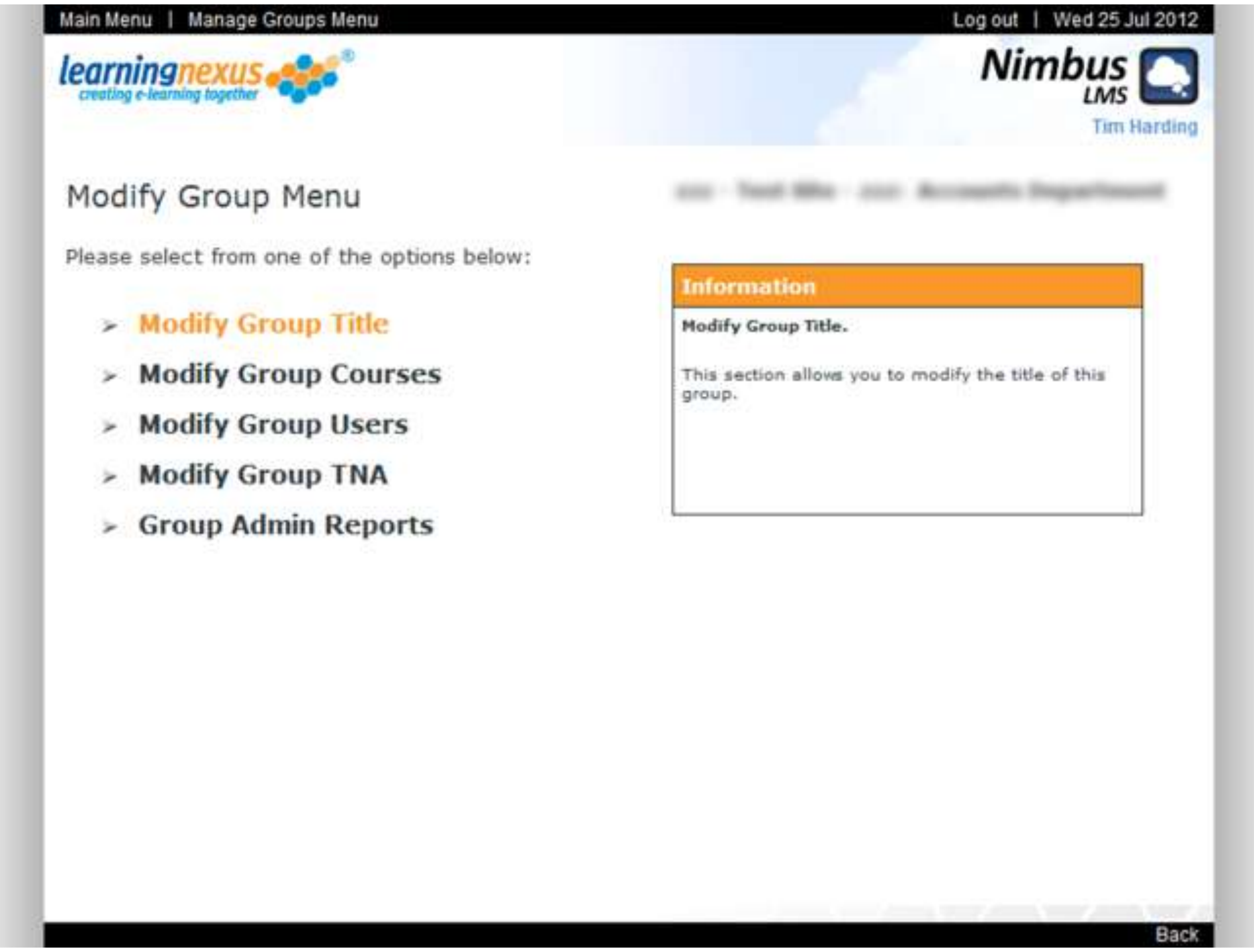


Figure 6-10: Modify Group Menu

The modify group menu consists of six possible functions: -

- Modify Group Title
- Modify Group Courses
- Modify Group Users
- Modify Group TNA
- Group Admin Reports
- Group Risk Reports

Each of these functions is explained in detail below: -

Modifying the Group Title

The modify group title section is accessed by clicking on the 'Modify Group Title' item in the Modify Group Menu. The modify group title section consists of a text box containing the title of the group. When the group title has been modified, the new group title is saved by clicking on the 'Update' element.

Modifying the Group Courses

The section used to modify a group's courses is accessed by clicking on the 'Modify Group Courses' item in the Modify Group Menu. This section allows an administrator to modify the list of courses that are made available to members of the selected group. Figure 6-11 shows the group courses modification section of the LMS: -

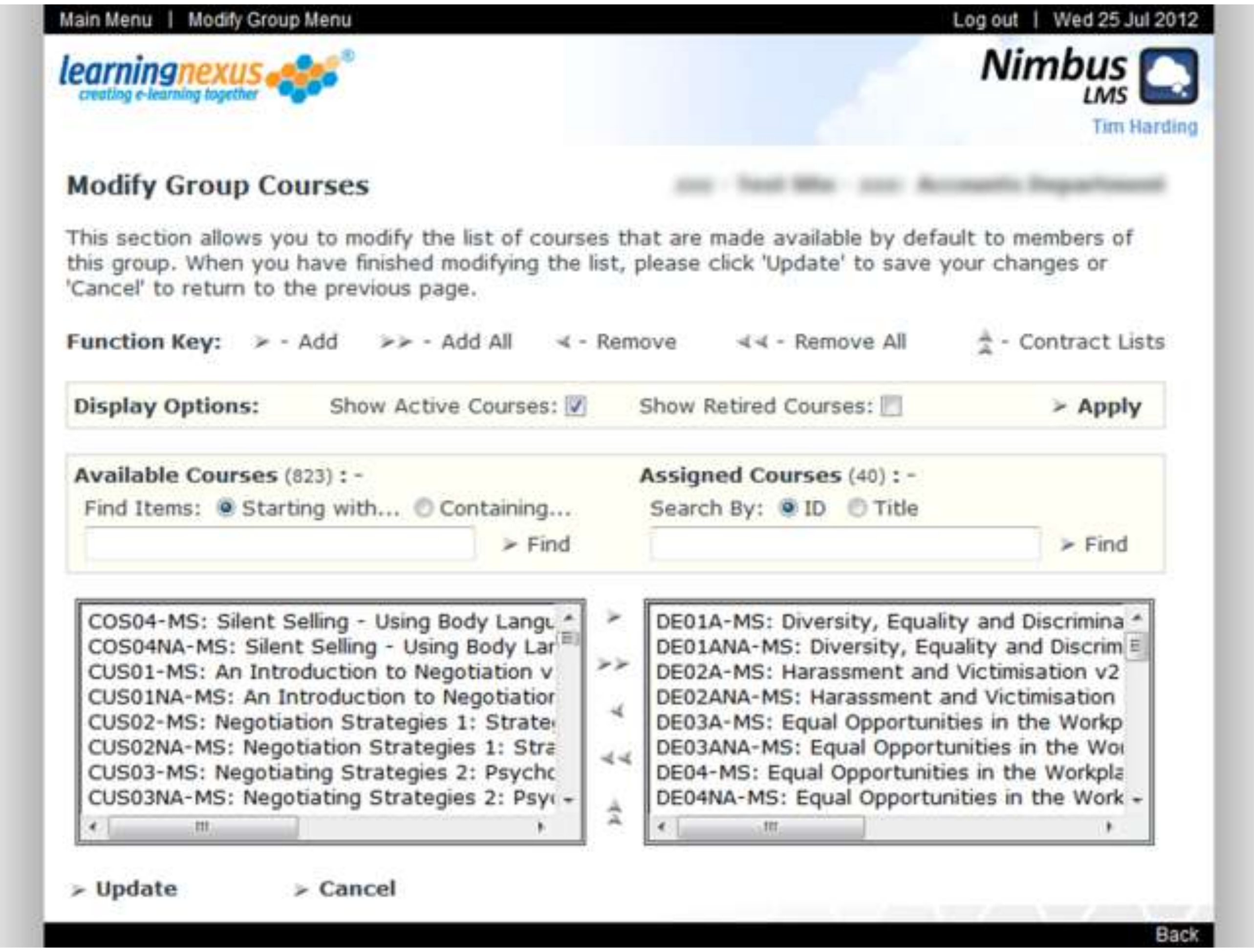


Figure 6-11: Modify Group Courses Section

On first entering this section, the 'Available Courses' list consists of all of the courses that are allocated to the site but have not yet been assigned to the group and the 'Assigned Courses' list consists of all of the courses that have already been assigned to the group. The courses are shown using the ID specified for the course and then the course title and are listed alphabetically.

Courses in the lists can be located using the 'Find Items' boxes and are selected by using the usual click, control-click and shift-click keyboard / mouse combinations. Courses are moved between the lists by using the arrow elements that are situated between the two lists. When the desired courses have been moved to the appropriate lists, the courses assigned to the group are confirmed by clicking on the 'Update' element.

Modifying the Group Users

The section used to modify a group's users is accessed by clicking on the 'Modify Group Users' item in the Modify Group Menu. This section allows an administrator to modify the users who are members of the selected group. Figure 6-12 shows the group users modification section of the LMS: -

Figure 6-12: Modify Group Users Section

On first entering this section, the 'Available Users' list consists of all of the users who are members of the site but have not yet been made members of the group and the 'Assigned Users' list consists of all of the users who are already members of the group. The users are displayed using the format {Surname}, {Forename} {Initial} and are listed alphabetically.

Users in the lists can be located using the 'Find Items' boxes and are selected by using the usual click, control-click and shift-click keyboard / mouse combinations. Users are moved between the lists by using the arrow elements that are situated between the two lists. When the desired users have been moved to the appropriate lists, the members of the group are confirmed by clicking on the 'Update' element.

Modifying the Group TNA

The 'Modify Group TNA' item is only visible in the Modify Group Menu if the optional Training Needs Analysis tool is installed in the LMS and has been made available to the site of which the currently selected group is a member. This section is used to modify the list of subject areas and topics that is presented to members of a group when using the Training Needs Analysis tool in the LMS. The section is accessed by clicking the 'Modify Group TNA' item in the Modify Group Menu. Figure 6-13 shows the Group TNA modification section of the LMS: -

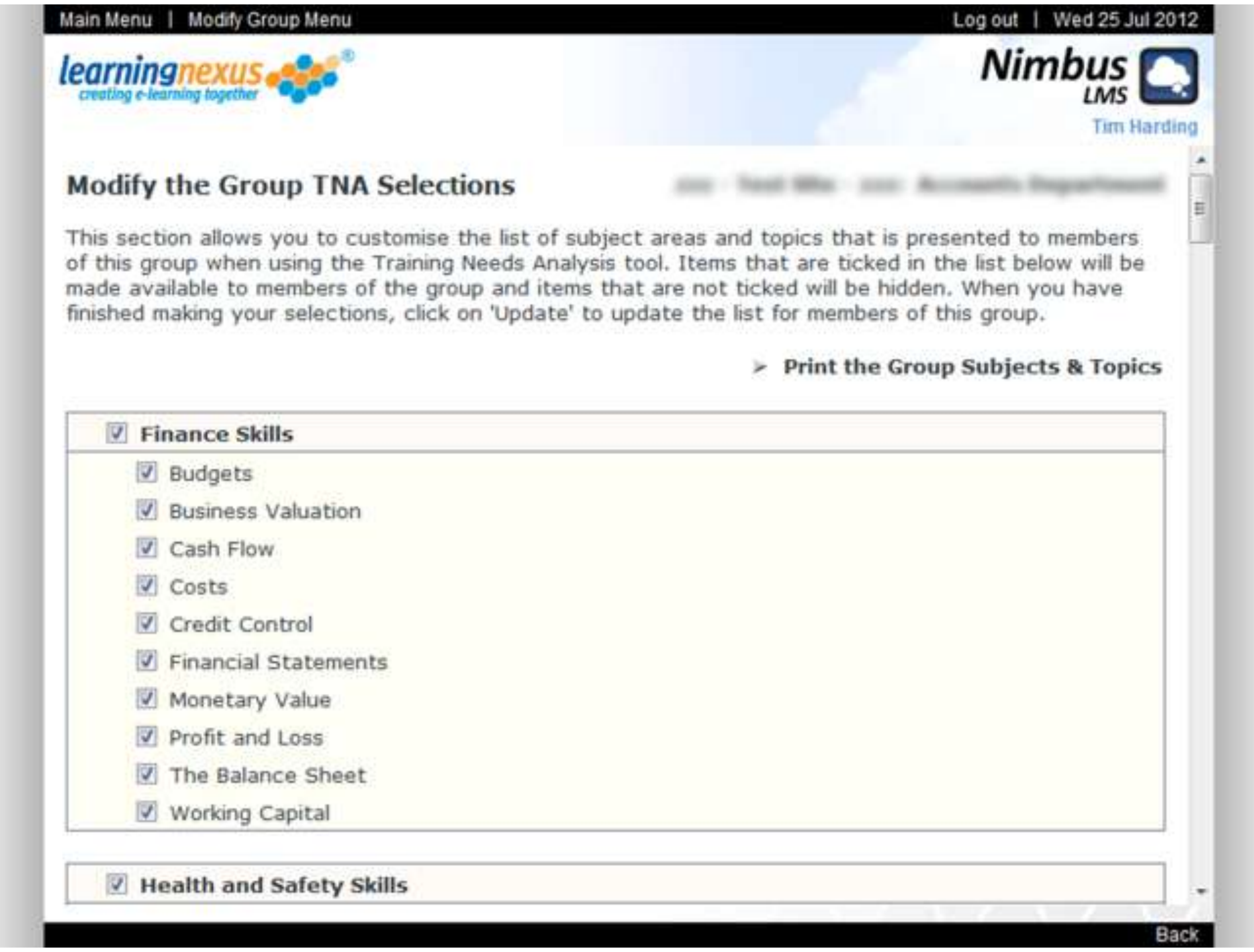


Figure 6-13: Modify Group TNA Section

On first entering the section, the subject areas and topics that are currently being made available to members of the group are ticked. Subject areas and topics are selected or de-selected by clicking the tick box next to the title. When all of the desired subject areas and topics have been selected, the list is confirmed by clicking on the 'Update' element at the bottom of the page. The list of subject areas and topics that is currently being presented to members of the group can be printed by clicking on the 'Print the Group Subjects & Topics' element.

Generating Usage Reports for the Group

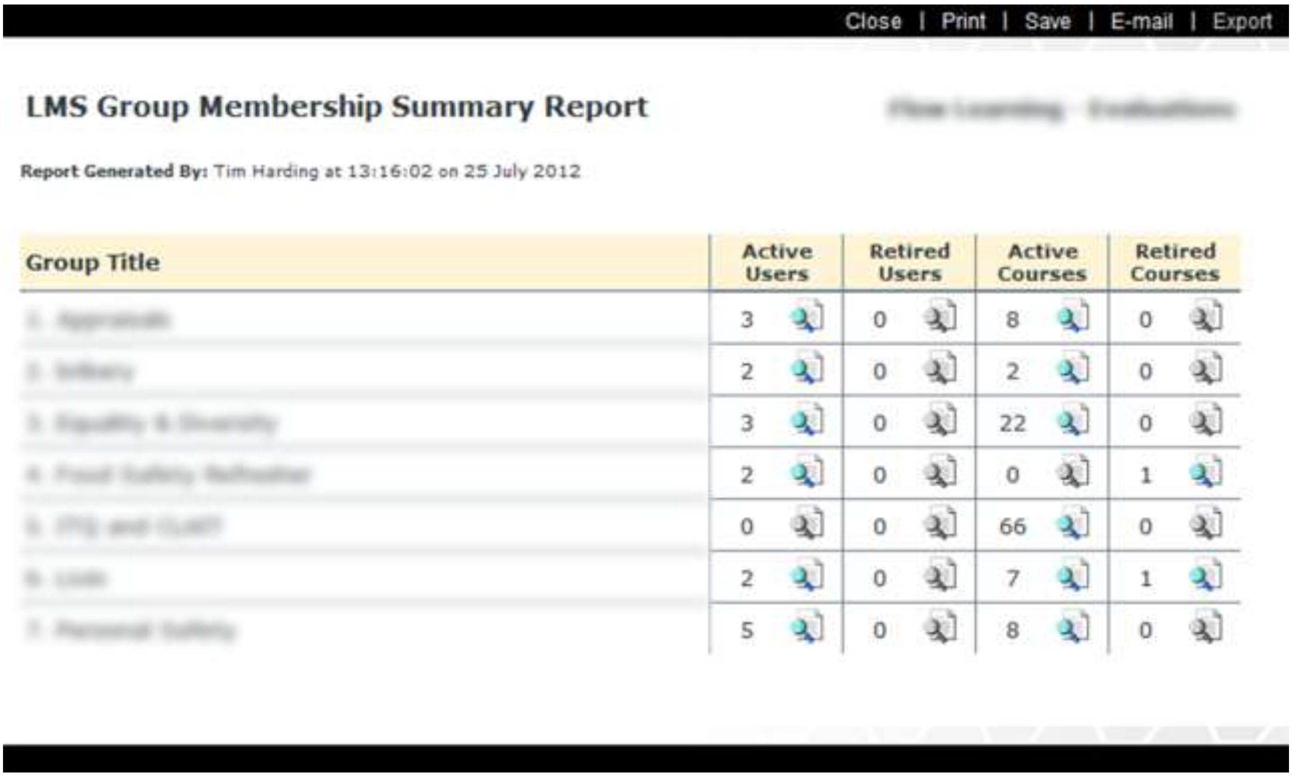
The administration reports menu for the group is accessed by clicking on the 'Group Admin Reports' item in the Modify Group Menu. This menu and the procedure for generating administration reports is explained in Chapter 8 – Generating Administration Reports on page 73 of this document.

Generating Risk Assessment Reports for the Group

The risk assessment reports menu for the group is accessed by clicking on the 'Group Risk Reports' item in the Modify Group Menu. This item is only displayed if the optional 'Risk Assessment Module' has been installed and made available to the LMS site. The risk assessment reports menu and the procedure for generating risk reports is explained in Chapter 9 – Generating Risk Assessment Reports on page 101 of this document.

Generating a Group Member Summary Report

A group member summary report is generated by one or more groups from the list of the available groups and then clicking on the 'Group Member Summary' item in the manage site groups menu. Figure 6-14 shows a sample group member summary report: -


Close | Print | Save | E-mail | Export

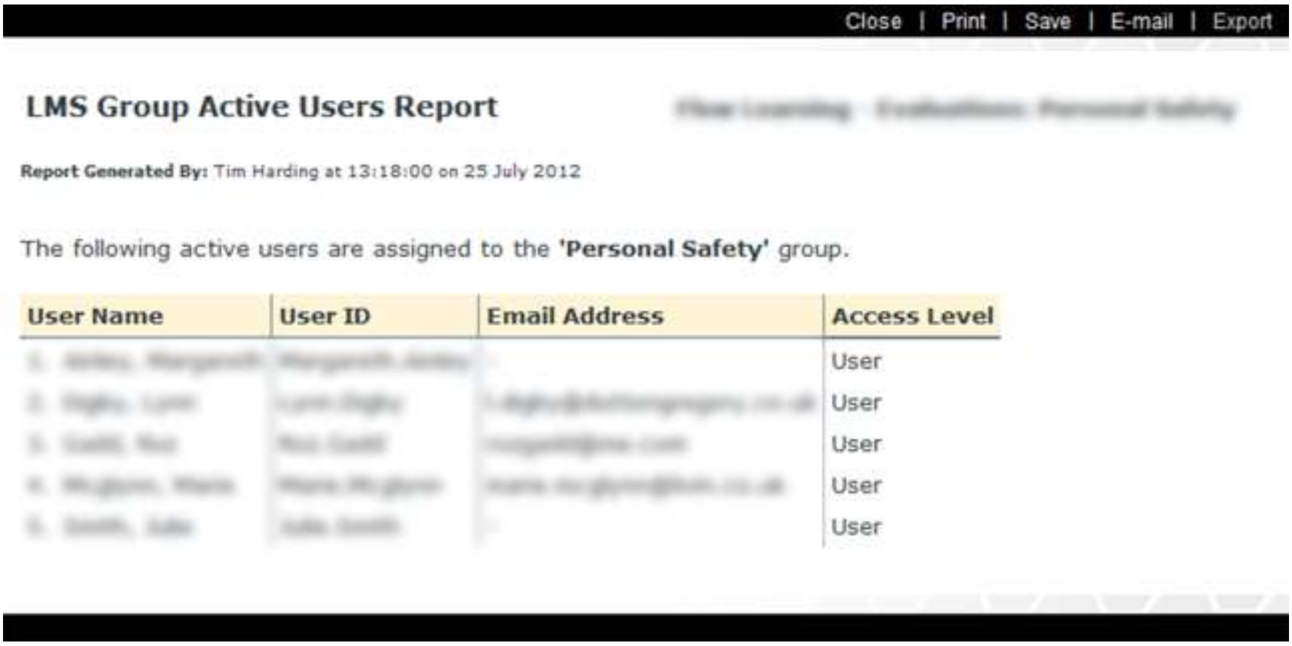
LMS Group Membership Summary Report

Report Generated By: Tim Harding at 13:16:02 on 25 July 2012

Group Title	Active Users	Retired Users	Active Courses	Retired Courses
[illegible]	3	0	8	0
[illegible]	2	0	2	0
[illegible]	3	0	22	0
[illegible]	2	0	0	1
[illegible]	0	0	66	0
[illegible]	2	0	7	1
[illegible]	5	0	8	0

Figure 6-14: Sample Group Member Summary Report

The group member summary report shows the number of users and courses which have been assigned to each of the selected groups. A group users report can be generated by clicking on the icon in the 'Users' columns of the report and a group courses report can be generated by clicking on the icon in the 'Courses' columns of the report. Figure 6-15 shows a sample group users report: -


Close | Print | Save | E-mail | Export

LMS Group Active Users Report

Report Generated By: Tim Harding at 13:18:00 on 25 July 2012

The following active users are assigned to the **'Personal Safety'** group.

User Name	User ID	Email Address	Access Level
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User
[illegible]	[illegible]	[illegible]	User

Figure 6-15: Sample Group Users Report

Generating Usage Reports for a Group

The administration reports menu for a group is accessed by selecting the appropriate entry from the list of available groups and then clicking on the 'Group Access Reports' item in the manage site groups menu. This menu and the procedure for generating administration reports are explained in Chapter 8 – Generating Administration Reports on page 73 of this document.

Managing Site Users

The manage site users menu is accessed by clicking on the 'Manage Site Users' item in the site administration menu.

Figure 6-16 shows the manage site users menu: -

Figure 6-16: Manage Site Users Menu

The manage site users menu consists of a list of all of the users who are currently members of the site, options to display active and retired users, an option to select all of the items in the list and a menu of user management functions: -

- Add User
- Modify User
- Relocate Users
- Retire Users
- Activate Users
- Delete Users

The users who are currently members of the site are displayed using the format {Surname}, {Forename} {Initial} ({User ID}) and are listed alphabetically. The entries in the list can be located using the 'Find Items' box and can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations.

Each of the user management functions is explained in detail below: -

Adding a User

The section of the LMS that is used to create a new user account is accessed by clicking on the 'Add User' item in the manage site users menu.

Figure 6-17 shows the new user account creation section: -

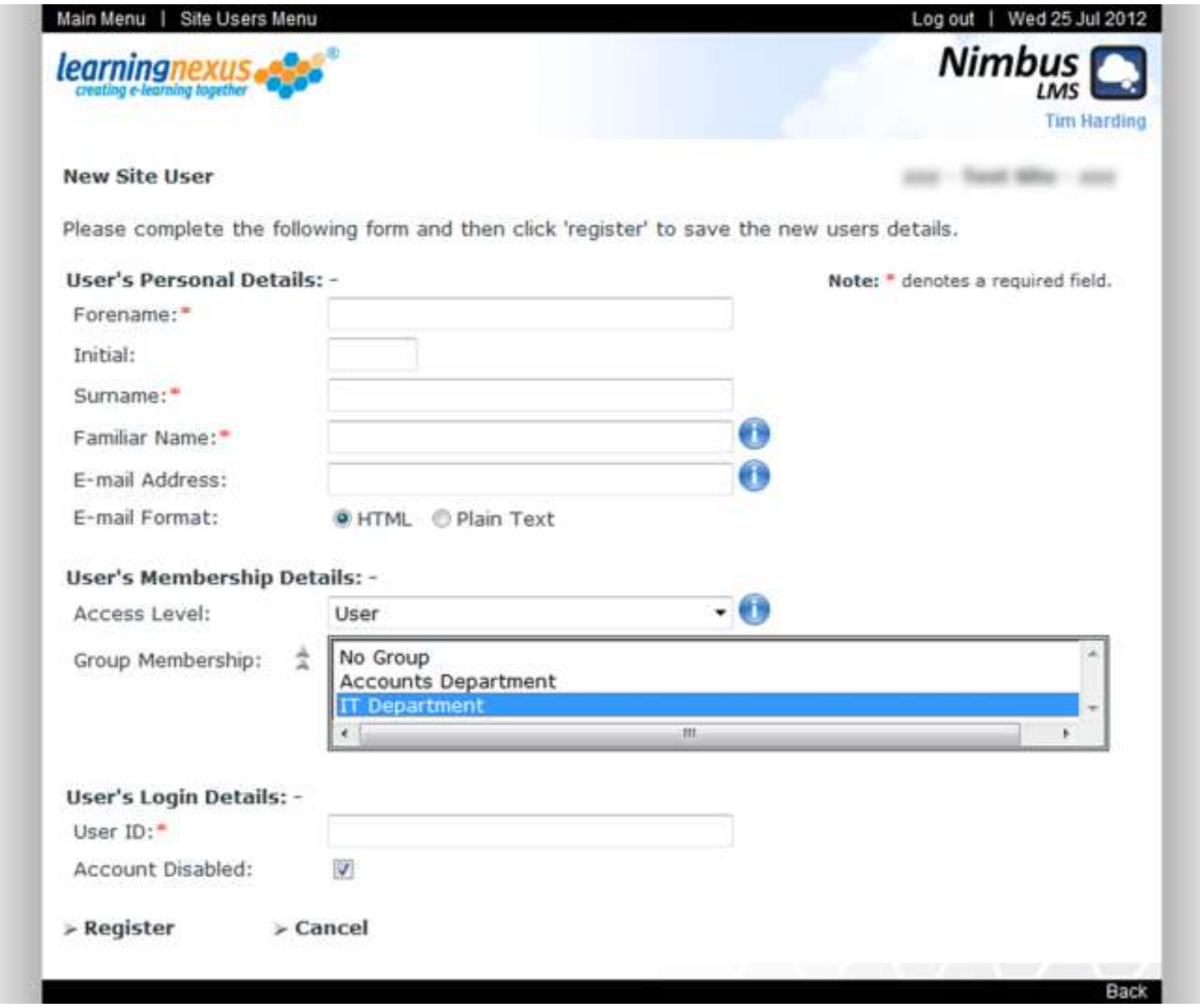


Figure 6-17: Add User Section

The add user section contains three groups of settings for the new user account: -

User's Personal Details: -

- <u>Forename</u>

  This is the first name of the user.

- <u>Initial</u>

  This is the middle initial of the user (if appropriate).

- <u>Surname</u>

  This is the last name of the user.

- Familiar Name

  This is the informal name by which the user prefers to be called. This entry is the name that is displayed on the menu navigation bar of the LMS user interface and in any reports or certificates that are generated by the user themselves.

- E-mail Address

  This is the email address by which the user prefers to be contacted. This setting is only displayed if the SMTP e-mail options have been configured in the LMS System Administration Settings.

- E-mail Format

  This is the format in which emails sent to the user will be constructed. This setting is only displayed if the SMTP e-mail options have been configured in the LMS System Administration Settings.

User's Membership Details: -

- Access Level

  This drop-down list contains the security levels that are available for the new user. The available security levels are: -

  - Site Administrator
  - Group Manager (if groups have been defined within the site)
  - User

- Group Membership

  This list contains all of the groups that have been defined within the site and are listed alphabetically. The entries in the list can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations. The new user can be made a member of one or more of the available groups by selecting the appropriate entries in this list. If a default group had been specified for the site, this entry will automatically be selected. If you do not wish to make the new user a member of any of the available groups, select the 'No Group' item in the list.

User's Login Details: -

- User ID

  This is the entry that must be entered by the user in the User ID box on the login page of the LMS. This value is not case sensitive.

If a secure password policy has been applied in the site settings then the following option is displayed: -

- Account Disabled

  Selecting this option specifies that the user account will be created in a disabled state and cannot be used until it has been reset by an LMS system administrator or site administrator. If this option is not selected then an automatically generated, single use password is displayed which must be entered by the new user in order to login to the LMS for the first time. A link to copy this password to the system clipboard is also displayed.

If a secure password policy has not been applied in the site settings then the following settings are displayed: -

- Password

  This is the password that must be entered by the user in order to login to the LMS. This entry IS case sensitive. If this entry is left blank then the user can enter and then confirm a password of their own choice the first time that they login to the LMS. The text entered in this box is masked for security reasons.

- Confirm Password

  This entry is used to confirm the password for the user and must be the same as the 'Password' setting in order for the account to be created. The text entered in this box is masked for security reasons.

When the appropriate entries have been made for the details of the new user, the account is created by clicking on the 'Register' element.

Modifying a User

The section of the LMS that is used to modify a user account is accessed by selecting a single entry from the list of available user accounts and then clicking on the 'Modify User' item in the manage site users menu.

Figure 6-18 shows the user account modification section: -

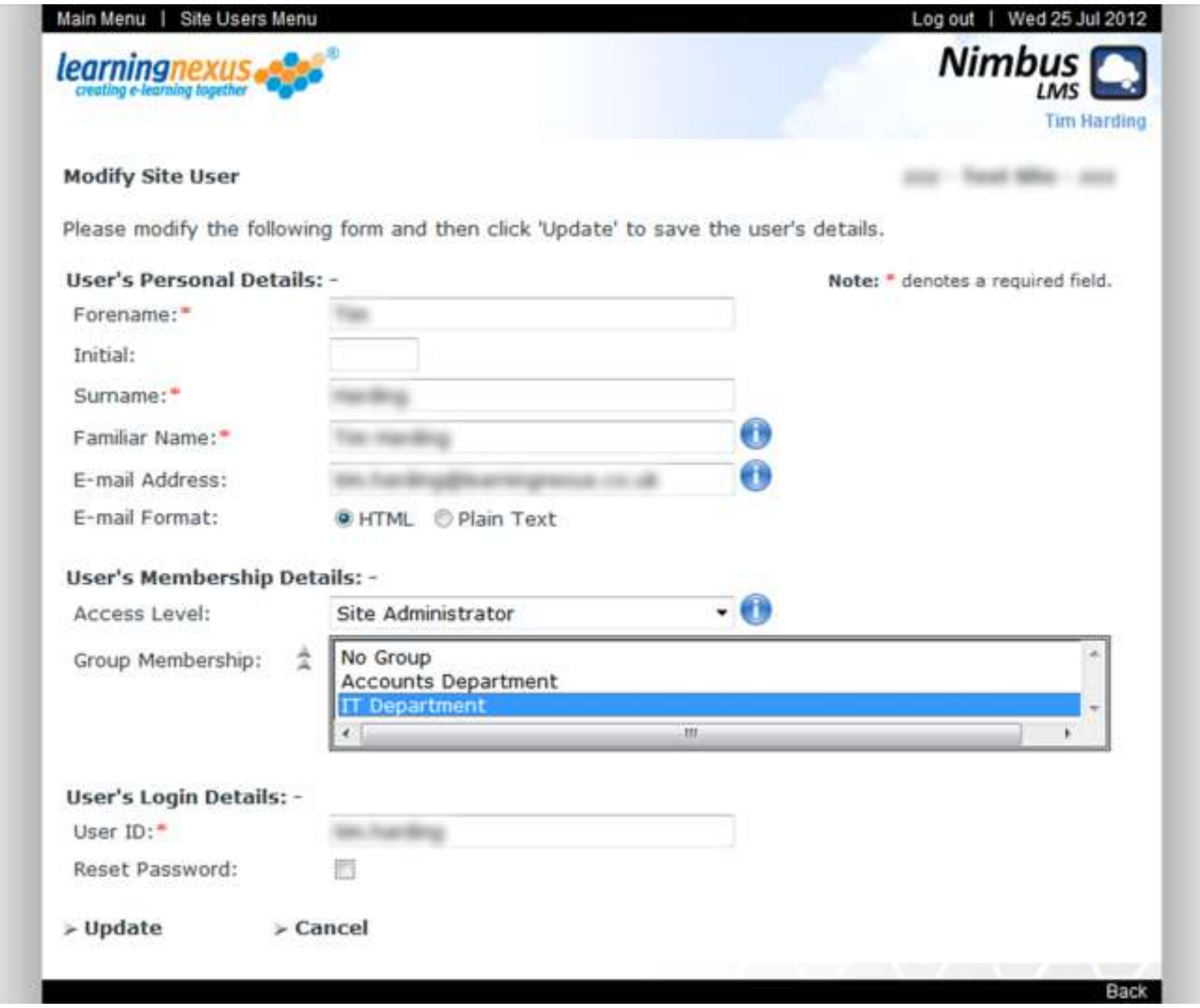


Figure 6-18: Modify User Section

This section contains the same sets of settings as those described in the Adding a User section on page 59 of this document with the addition of an option to reset the password values. On first entering this section, these settings contain the entries that are currently defined for the selected user account.

If this section is being accessed by a System Administrator, the following setting is also displayed under 'User's Membership Details': -

- Site Membership

  This drop down list contains all of the alternate sites which have been defined within the LMS and are listed alphabetically. If this setting is modified, the page will reload in order to display the groups available in the selected site and updating these settings will remove the user from the original site and make them a member of the selected site.

When the settings have been changed to the desired entries, the modified details of the user are saved by clicking on the 'Update' element.

Relocating Users

The section of the LMS that is used to relocate user accounts between different LMS sites is accessed by selecting one or more entries from the list of available user accounts and then clicking on the 'Relocate Users' item in the manage site users menu.

NOTE: This menu item is only displayed if the manage site users menu is being accessed by a System Administrator.

Figure 6-19 shows the user account relocation section: -

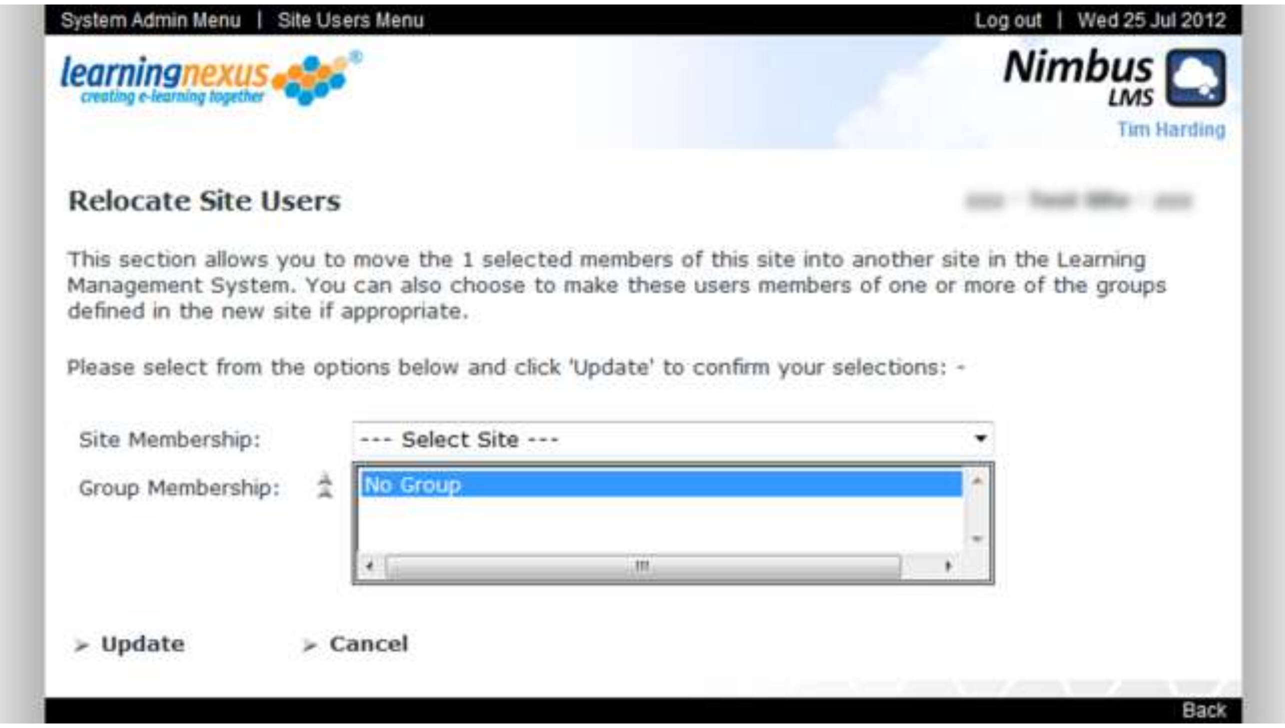


Figure 6-19: Relocate Users Section

The relocate site users section consists of a list of all of the alternate sites which have been defined within the LMS and a list of the groups which have been defined within the selected site.

Once the alternate site and group(s) have been selected, the selected users are relocated by clicking on the 'Update' element.

Retiring Users

If the 'Show Active' checkbox is selected in the 'Display Options' box then one or more active users can be retired by selecting the appropriate user entries from the list of available users and then clicking on the 'Retire Users' item in the user management menu.

NOTE: when a user is retired, the user's account is disabled and no longer counts towards the user limit imposed on the site and the LMS but the learning activity data that is associated with the user account is retained and can be reported on by LMS Administrators and Group Managers.

Activating Users

If the ‘Show Retired’ checkbox is selected in the ‘Display Options’ box then one or more previously retired users can be re-activated by selecting the appropriate user entries from the list of available users and then clicking on the ‘Activate Users’ item in the user management menu.

Deleting Users

One or more user accounts can be permanently deleted from the site by selecting the appropriate entries from the list of available user accounts and then clicking on the ‘Delete Users’ item in the manage site users menu.

NOTE: when a user account is deleted from the site, all of the learning activity data that is associated with that user account is also permanently deleted.

Managing Site Tools

The 'Manage Site Tools' item is only visible in the site administration menu if the optional Training Needs Analysis tool is installed in the LMS and has been made available to the site. The manage site tools menu is accessed by clicking on the 'Manage Site Tools' item in the site administration menu.

Figure 6-20 shows the manage site tools menu: -

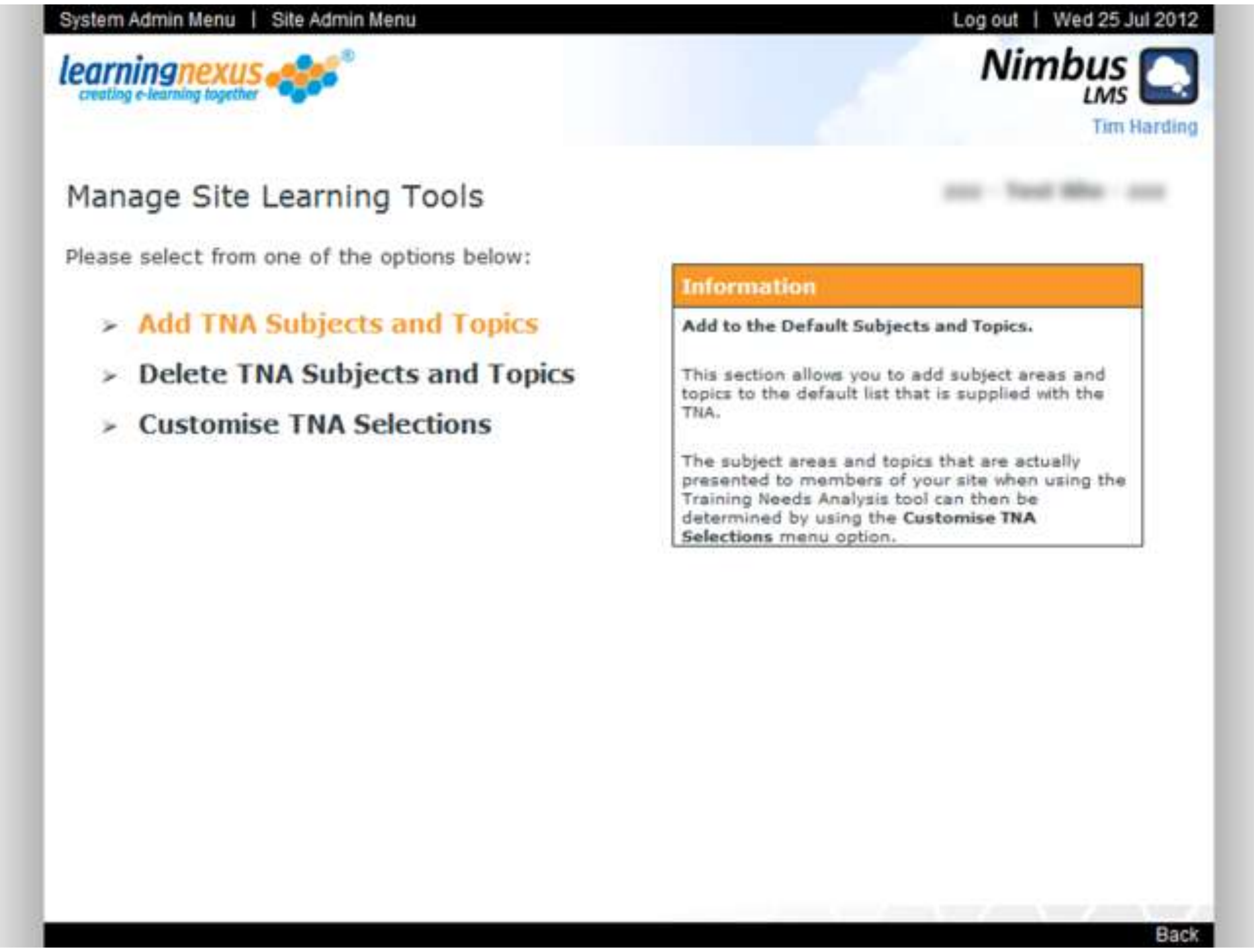


Figure 6-20: Manage Site Tools Menu

The manage site tools menu consists of three functions: -

- Add TNA Subjects and Topics
- Delete TNA Subjects and Topics
- Customise TNA Selections

Each of these functions is explained in detail below: -

Adding TNA Subjects and Topics

This section of the LMS is used to add subject areas and topics to the default list that is supplied with the Training Needs Analysis tool. This section is accessed by clicking the 'Add TNA Subjects and Topics' item in the manage site tools menu.

Figure 6-21 shows the add TNA subjects and topics section: -

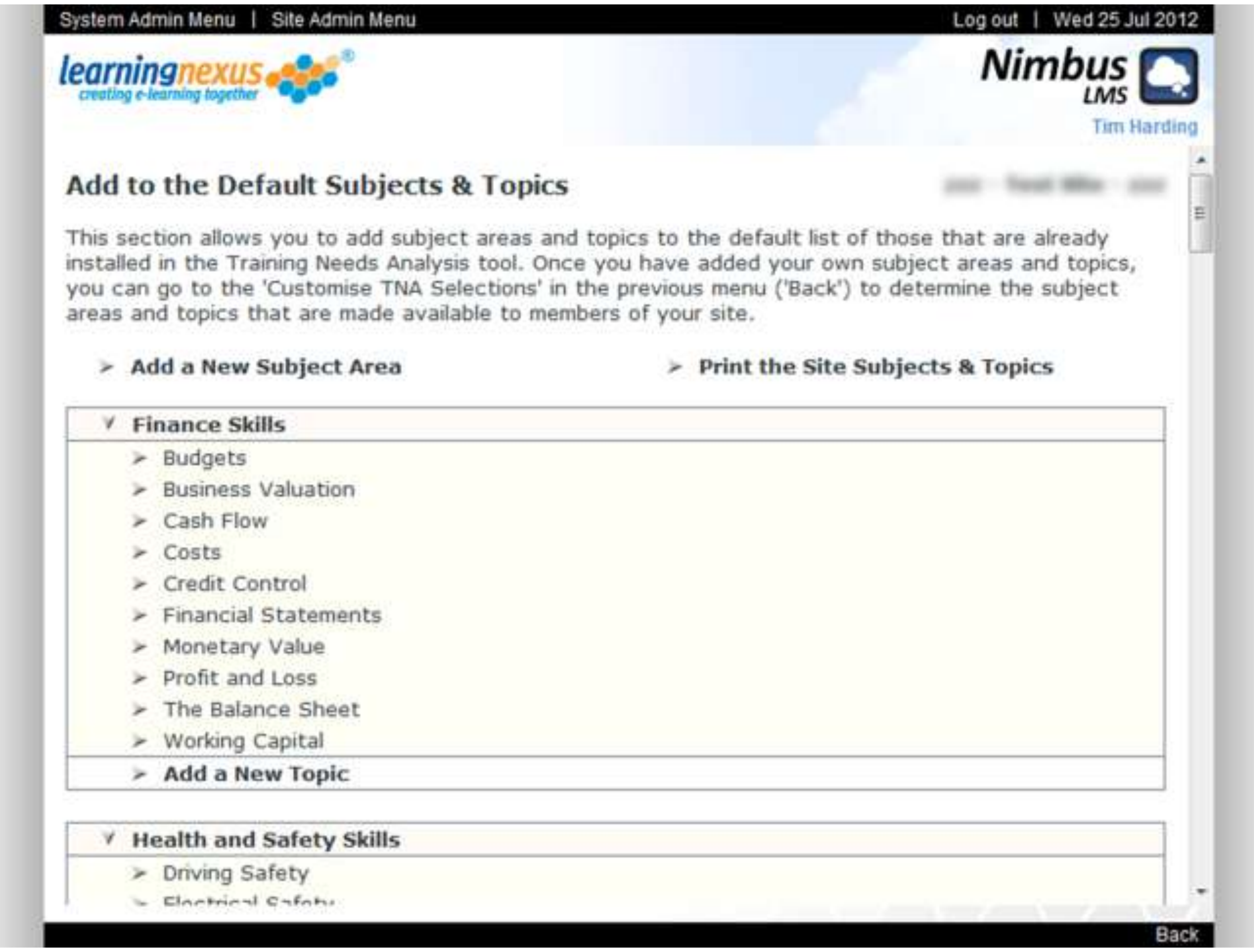


Figure 6-21: Add TNA Subjects and Topics Section

The add TNA subject areas and topics section consists of a list of all of the subject areas and topics that are currently installed in the Training Needs Analysis tool and three menu items: -

- Add a New Subject Area

  This menu item is used to add a new subject area and topic to the default list that is supplied with the Training Needs Analysis tool.

- Add a New Topic

  This menu item appears at the bottom of each subject area and is used to add a new topic to the relevant subject area.

- Print the Site Subjects and Topics

  This menu item is used to print a list of all of the subject areas and topics that are currently installed in the Training Needs Analysis tool for the site.

Deleting TNA Subjects and Topics

This section of the LMS is used to delete subject areas and topics that have been added to the default list that is supplied with the Training Needs Analysis tool. This section is accessed by clicking the 'Delete TNA Subjects and Topics' item in the manage site tools menu.

Figure 6-22 shows the delete TNA subjects and topics section: -

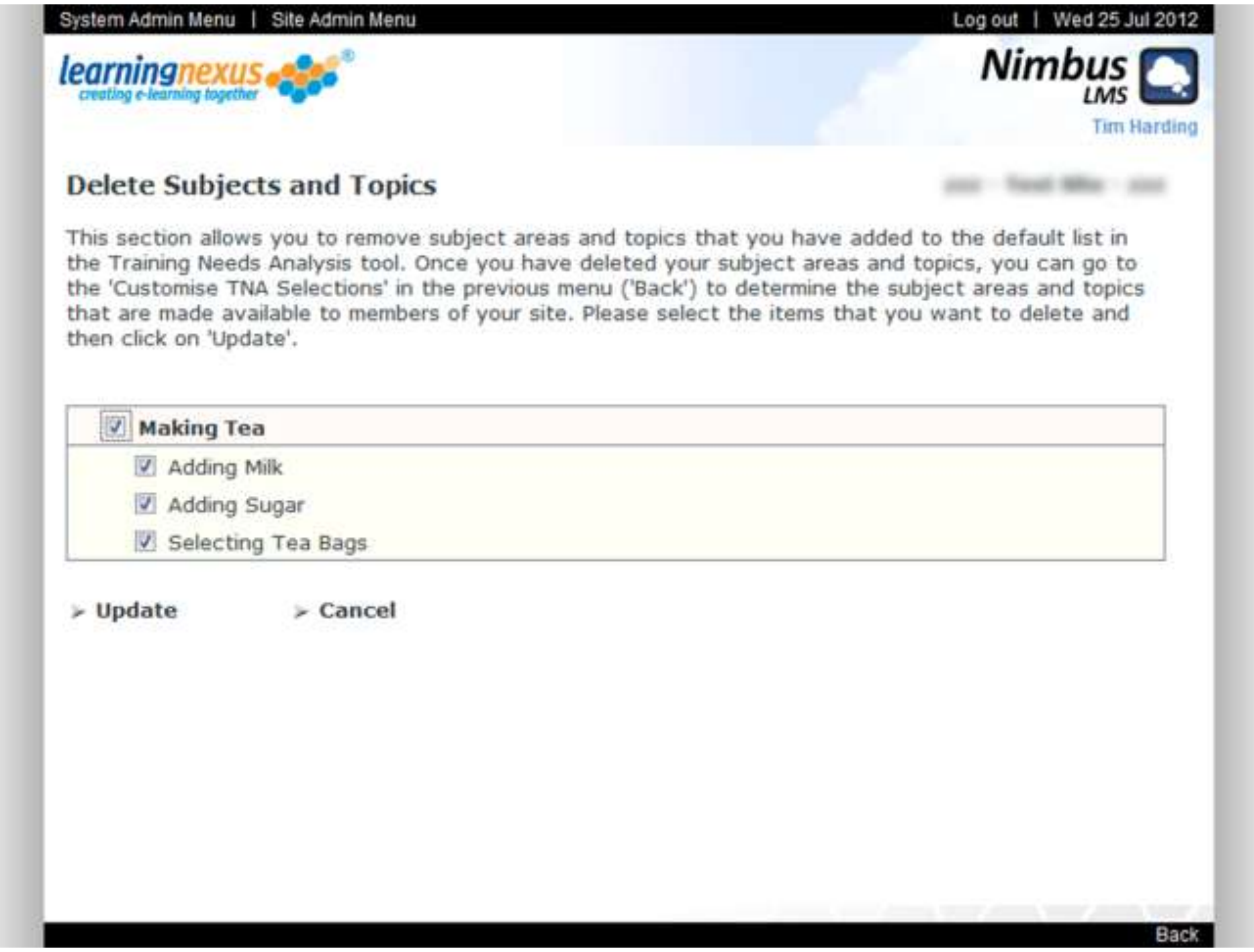


Figure 6-22: Delete TNA Subjects and Topics Section

The delete TNA subjects and topics section shows a list of all of the subject areas and topics that have been added to the default list that is supplied with the Training Needs Analysis tool. The subject areas and topics are selected by clicking the tick boxes next to the title. Once all of the subject areas and topics that are to be deleted have been selected, the deletions are confirmed by clicking the 'Update' element.

Customising TNA Selections

This section of the LMS is used to customise the list of subject areas and topics (both the default ones and those that have been added to the site) that is presented to members of the site in the Training Needs Analysis tool. This section is accessed by clicking the 'Customise TNA Selections' item in the manage site tools menu.

Figure 6-23 shows the customise TNA selections section: -

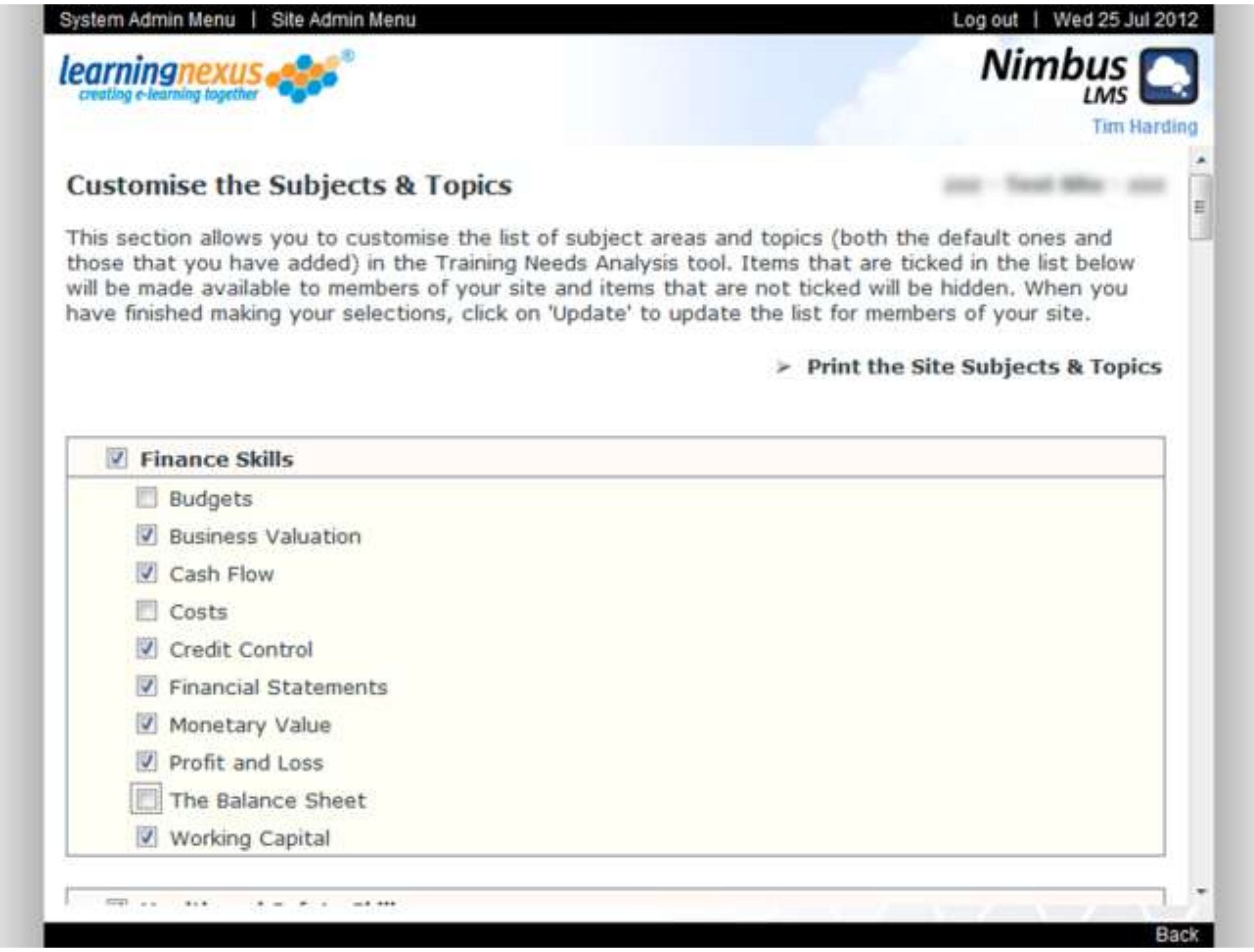


Figure 6-23: Customise TNA Selections Section

The customise TNA selections section shows a list of all of the subject areas and topics that are installed in the Training Needs Analysis tool for the site. The subject areas and topics that are to be presented to members of the site in the Training Needs Analysis tool are selected by clicking the tick boxes next to the title. Once all of the subject areas and topics that are to be presented to members of the site have been selected, the choices are confirmed by clicking the 'Update' element.

The list of subject areas and topics that are currently being presented to members of the site in the Training Needs Analysis tool can be printed by clicking the 'Print the Site Subjects and Topics' element.

Generating Usage Reports for the Site

The administration reports menu for the site is accessed by clicking on the 'Site Admin Reports' item in the site administration menu. This menu and the procedure for generating administration reports are explained in Chapter 8 – Generating Administration Reports on page 73 of this document.

Generating Risk Assessment Reports for the Site

The risk assessment reports menu for the site is accessed by clicking on the 'Site Risk Reports' item in the site administration menu. This item is only displayed if the optional 'Risk Assessment Module' has been installed and made available to the LMS site. The risk assessment reports menu and the procedure for generating risk reports is explained in Chapter 9 – Generating Risk Assessment Reports on page 101 of this document.

Viewing the Site Event Log

The event log for the site is displayed by clicking on the 'View Site Event Log' item in the site administration menu. Figure 6-24 shows a sample site event log report: -

Close | Print | Save | E-mail | Export

Administration Reports
Site Event Log

Report Generated By: Tim Harding at 13:55:45 on 25 July 2012

[illegible]

User Name	Event	Date / Time	Source
[illegible]	Successful Login	10/07/2012 08:18:35	86.128.196.215
[illegible]	Successful Login	10/07/2012 08:10:09	86.128.196.215
[illegible]	Successful Password Change (required by policy)	10/07/2012 08:10:06	86.128.196.215
[illegible]	Failed Login - Bad Password	10/07/2012 08:07:18	86.128.196.215
[illegible]	Failed Login - Bad Password	10/07/2012 08:06:58	86.128.196.215
[illegible]	User Modified by Site Administrator	04/07/2012 16:52:35	78.148.5.137
[illegible]	Successful Login	04/07/2012 16:51:35	78.148.5.137
[illegible]	New User Created	04/07/2012 16:44:38	78.148.5.137
[illegible]	Successful Login	04/07/2012 16:43:29	78.148.5.137
[illegible]	Failed Login - Bad Password	04/07/2012 16:43:03	78.148.5.137
[illegible]	Failed Login - Bad Password	04/07/2012 16:42:56	78.148.5.137
[illegible]	Successful Login	02/07/2012 12:34:49	217.36.76.205
[illegible]	Successful Login	02/07/2012 09:43:36	217.36.76.205
[illegible]	Failed Login - Bad Password	02/07/2012 09:43:22	217.36.76.205
[illegible]	Successful Login	29/06/2012 16:00:06	217.36.76.205
[illegible]	Successful Password Change (required by policy)	29/06/2012 16:00:04	217.36.76.205
[illegible]	New User Created	27/06/2012 10:35:40	78.146.160.26

Figure 6-24: Sample Site Event Log Report

7. Group Manager Tasks

The main menu of the LMS contains the additional 'Group Admin Reports' menu item when the currently logged-on user is a group manager. If the optional LMS Risk Assessment Module has been installed and made available to the group manager's site then the 'Group Risk Reports' menu item is also displayed.

Figure 7-1 shows the main menu that is displayed for a group manager: -

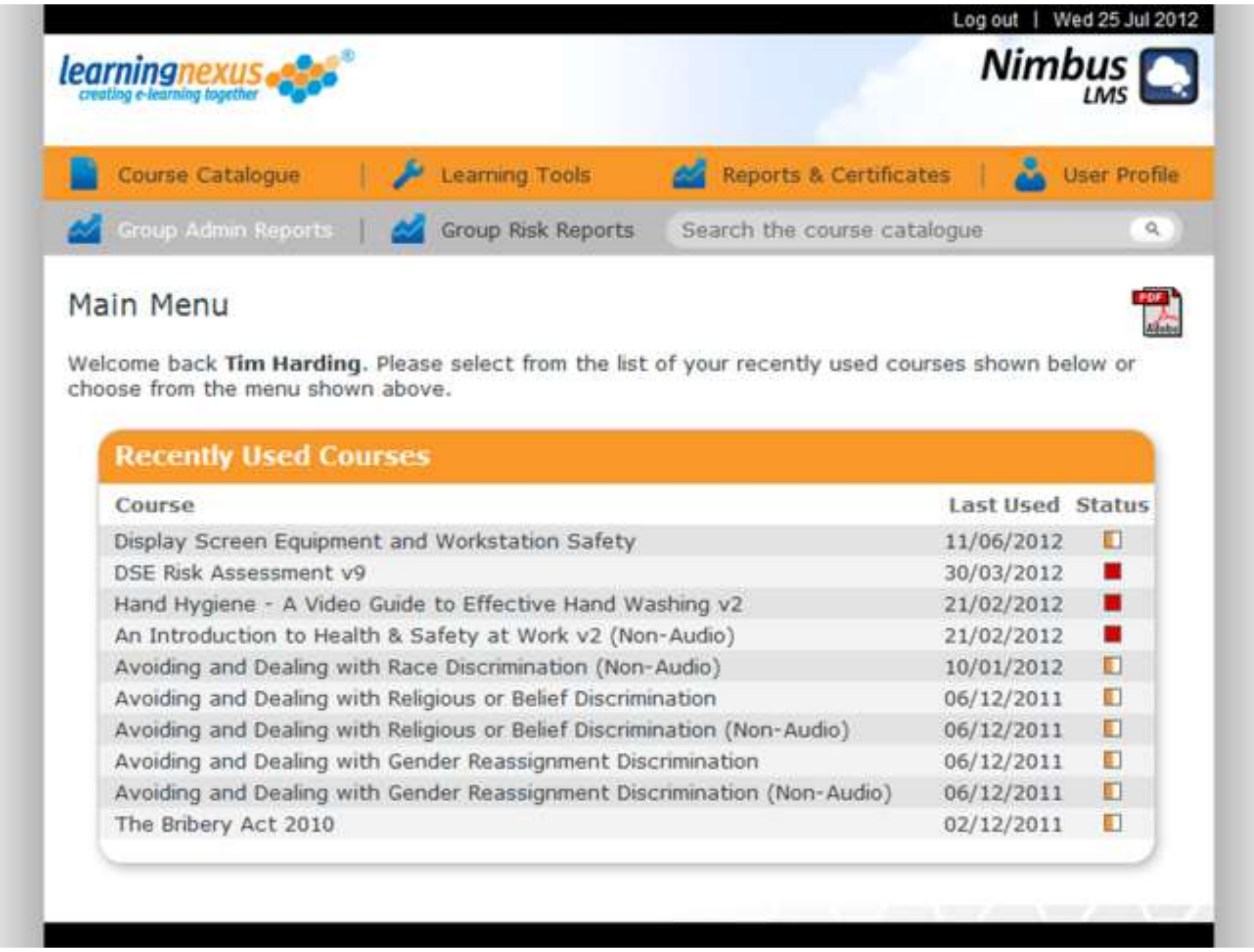


Figure 7-1: Main Menu for a Group Manager

Please note that clicking on the 'Adobe PDF' icon will open the Group Manager's Guide in a new window.

Generating Group Usage Reports

The administration reports menu for the group(s) managed by the group manager is accessed by clicking on the 'Group Admin Reports' item in the LMS main menu. If the group manager is a member of more than one of the groups that are defined within the site, they are given the choice of selecting the groups which they would like to be included in the report.

Figure 7-2 shows the group selection menu that is displayed to a group manager who is a member of multiple groups: -

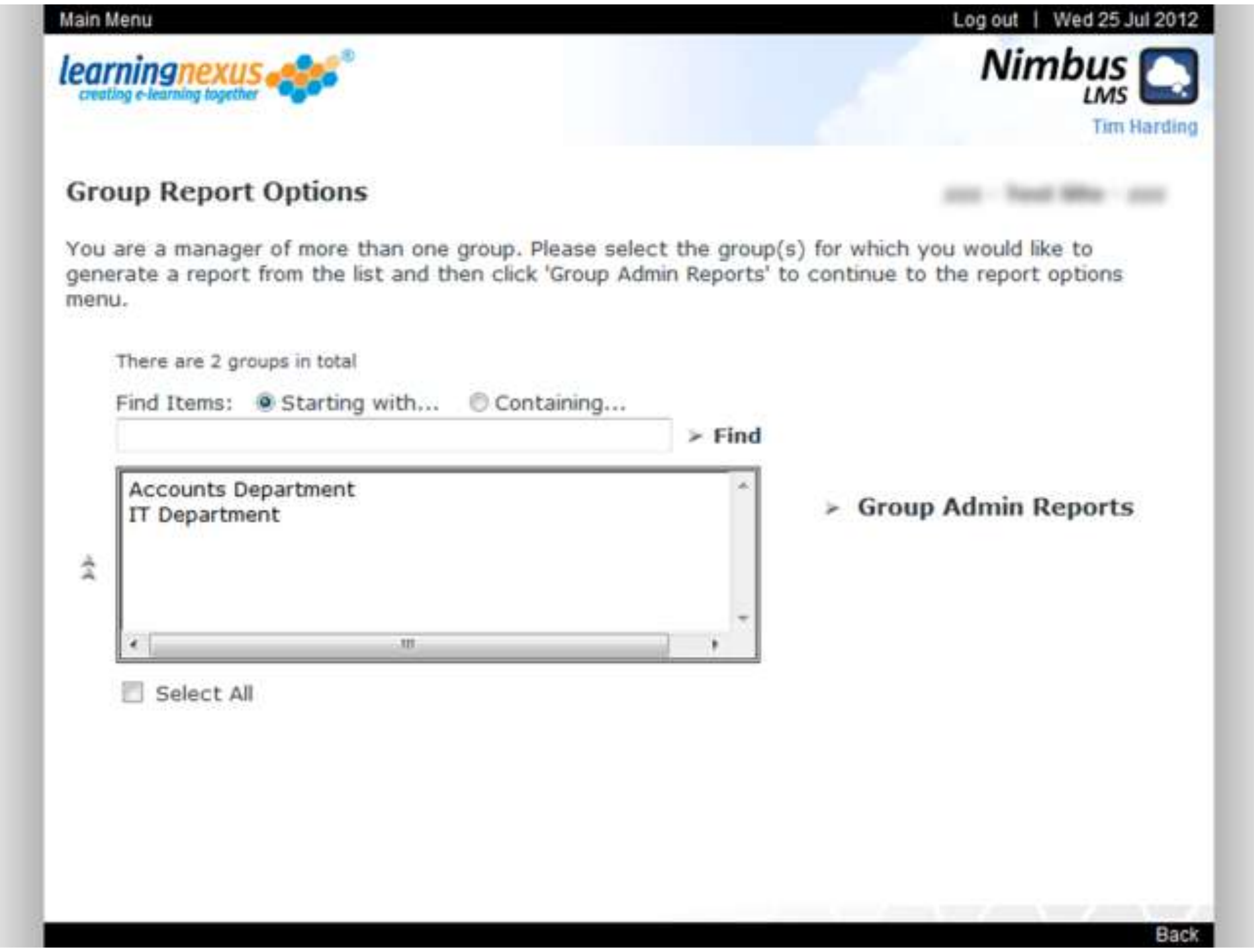


Figure 7-2: Group Selection Menu for Group Reports

The group selection menu consists of a list of all of the groups of which the group manager is a member, an option to select all of the items in the list and a 'Group Admin Reports' menu function. The entries in the list can be located using the 'Find Items' functions, are listed alphabetically and can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations.

When the desired groups have been selected, the administration reports menu is accessed by clicking on the 'Group Admin Reports' item in the group selection menu.

This menu and the procedure for generating administration reports are explained in Chapter 8 – Generating Administration Reports on page 73 of this document.

Generating Group Risk Reports

The risk reports menu for the group(s) managed by the group manager is accessed by clicking on the 'Group Risk Reports' item in the LMS main menu. If the group manager is a member of more than one of the groups that are defined within the site, they are given the choice of selecting the groups which they would like to be included in the report in the same manner as for the group admin reports detailed above.

When the desired groups have been selected, the risk reports menu is accessed by clicking on the 'Group Risk Reports' item in the group selection menu.

This menu and the procedure for generating risk reports are explained in Chapter 9 – Generating Risk Assessment Reports on page 101 of this document.

8. Generating Administration Reports

The administration report menu can be accessed from several different areas of the LMS in order to generate learning activity reports for a site or for groups that are defined within the site.

Figure 8-1 shows the administration report menu: -

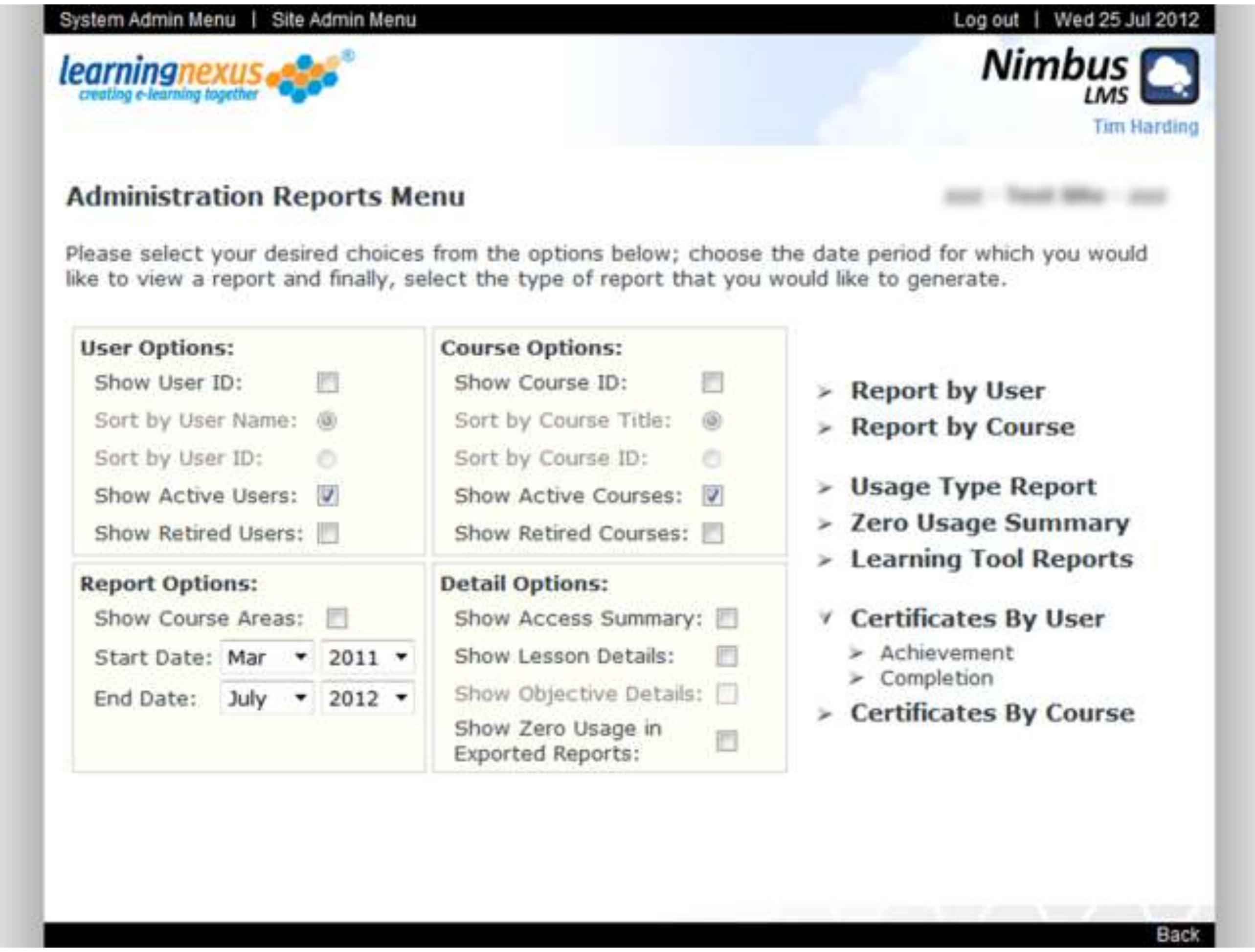


Figure 8-1: Administration Report Menu

The administration reports menu consists of four sets of report options: -

- <u>User Options</u>

  These settings determine if the user ID is to be shown in the report and if the users are to be sorted by name or by ID. The default settings are that the user ID is not shown and the users are sorted by name.

- <u>Course Options</u>

  These settings determine if the course ID is to be shown in the report and if the courses are to be sorted by title or by ID. The default settings are that the course ID is not shown and the courses are sorted by title.

- Report Options

  These settings determine if the course subject areas are to be shown in the report and the date period during which learning activities are to be reported on. The default settings are that the course areas are not shown and the date period is the entire period for which learning activity data is available.

- Detail Options

  A 'Report by User' or a 'Report by Course' can be generated with four possible levels of detail and can be exported to a CSV (Comma Separated Value) text file which can be opened with a spreadsheet program such as Microsoft Excel. The settings in this group determine the level of detail displayed in these reports.

The administration reports menu also contains the following menu items: -

- Report by User

  This menu item generates a report detailing the learning activities for each of the selected users; i.e. the courses that have been used by each user.

- Report by Course

  This menu item generates a report detailing the learning activities for each of the selected courses; i.e. the users that have used each course.

- Usage Type Summary

  This menu item generates a report summarising the type of usage (initial, in-progress, completion or post-completion) of all of the courses by all of the users that are allocated to the site or group(s).

- Zero Usage Summary

  This menu item generates a report summarising all of the users that are allocated to the site or group(s) that have not used any of the courses that are allocated to the site or group(s) within the reporting period.

- Learning Tool Reports

  This menu item generates a report detailing the results of the available learning tools for each of the selected users. This menu item is only available if any of the optional LMS learning tools have been installed and assigned to the site.

- Certificates by User

  This menu item has two sub-menu items: -

  - Achievement
  - Completion

  These sub-menu items generate a report detailing the courses for which each of the selected users has qualified for a certificate of achievement or a certificate of completion.

- <u>Certificates by Course</u>

  This menu item has two sub-menu items: -

  - Achievement
  - Completion

  These sub-menu items generate a report detailing the users who have qualified for a certificate of achievement or a certificate of completion for each of the selected courses.

Selecting any of the menu items listed above, except for the 'Usage Type Summary' or 'Zero Usage Summary' menu items and the 'Learning Tool Reports' menu item, accesses the administration report options menu. Figure 8-2 shows the administration report options menu: -

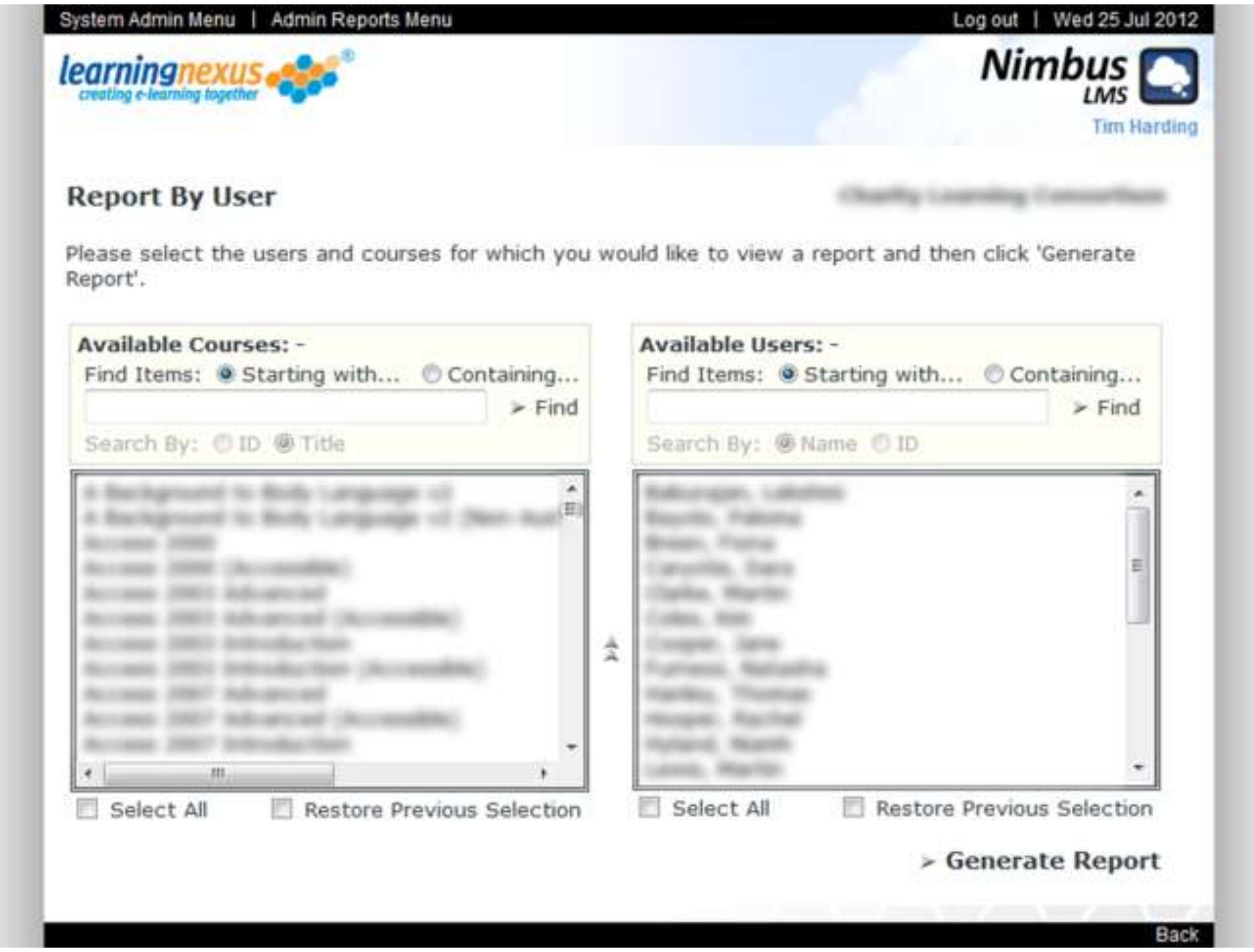


Figure 8-2: Administration Report Options Menu

The administration report options menu consists of two lists; each of which has an option to select all of the entries in the list. The 'Available Courses' list shows all of the courses that are allocated to the site or group(s) for which the desired report is to be generated. The 'Available Users' list shows all of the users who are members of the site or group(s) for which the desired report is to be generated. Both lists are formatted and sorted using the options selected in the previous administration reports menu.

Items in the lists can be located using the 'Find Items' boxes and can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations. If the current user has previously selected a set of courses and users in order to generate a report and they have not since exited the administration reports section then an option to restore the previous selection is also displayed under each list. When the courses and users to be included in the report have been selected, the report is generated by clicking on the 'Generate Report' option.

Learning Activity Reports

Access Summary Report

Figure 8-3 shows a sample access summary report: -

Close | Print | Save | E-mail | Export

Administration Reports - Access Summary Report By User

Report Generated By: Tim Harding at 14:13:20 on 25 July 2012
Report Options: Sort By User Name; Show Access Summary; Start Date: Mar 2012; End Date: July 2012.

User Name	Total Courses Used	First Date Used	Last Date Used	Total Duration (hh:mm:ss)	Total Complete
[illegible]	1	23/03/2012	30/03/2012	00:04:23	0
[illegible]	1	01/05/2012	02/05/2012	01:22:45	1
[illegible]	3	05/04/2012	05/04/2012	01:01:43	1
[illegible]	4	10/07/2012	10/07/2012	00:47:42	0
[illegible]	11	13/03/2012	26/06/2012	02:54:06	2
[illegible]	2	02/07/2012	02/07/2012	00:18:58	1
Totals:	22	13/03/2012	10/07/2012	06:29:37	5

Figure 8-3: Sample Access Summary Report

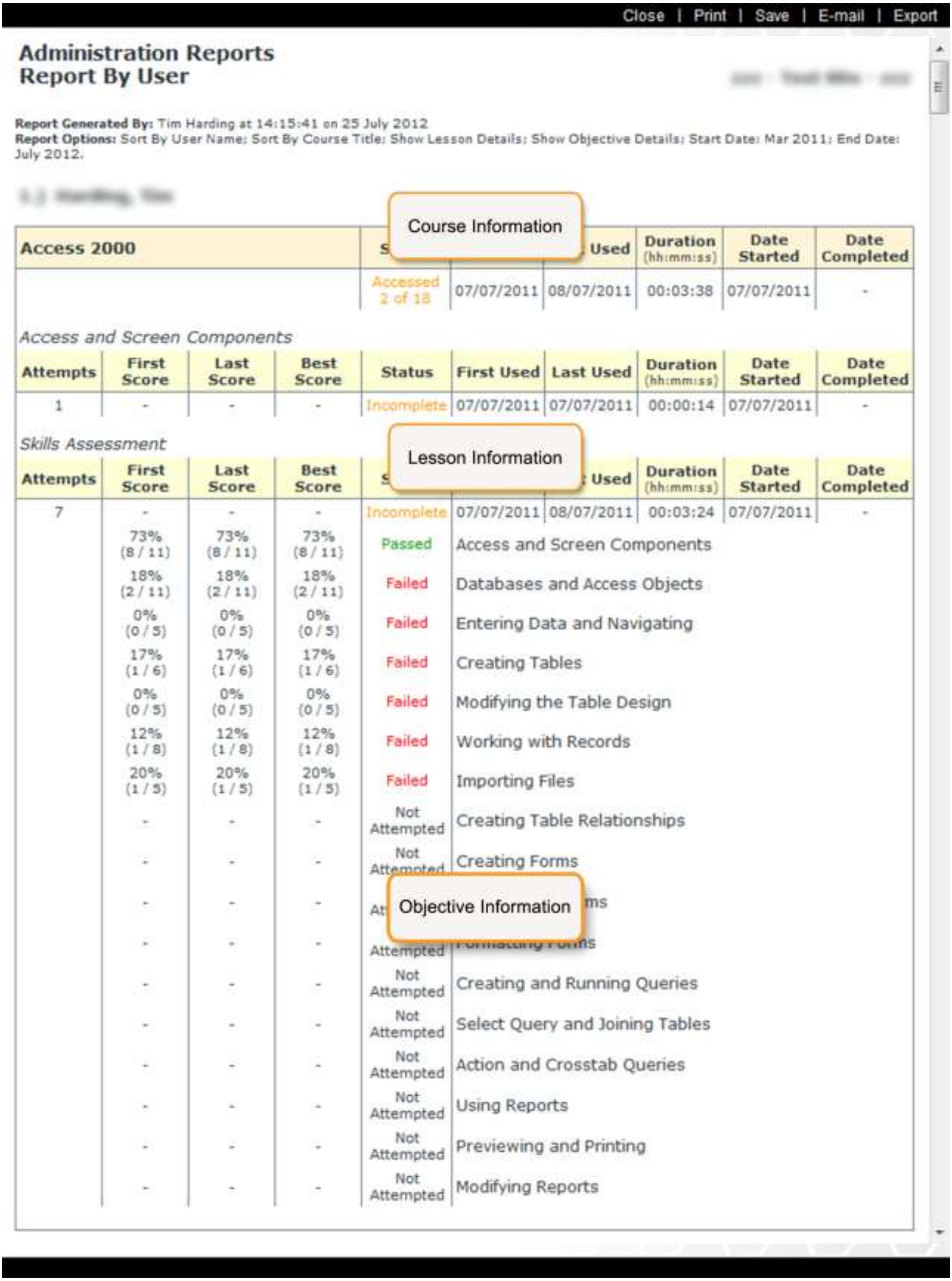
An access summary report shows the following information for each of the selected users / courses for which usage data has been recorded during the reporting period: -

- The total number of the selected courses that the user has accessed during the reporting period / the total number of the selected users who have accessed the course during the reporting period.
- The earliest date within the reporting period on which the user accessed one of the selected courses / the course was accessed by one of the selected users.
- The latest date within the reporting period on which the user accessed one of the selected courses / the course was accessed by one of the selected users.
- The total length of time during the reporting period that the user spent accessing the selected courses / was spent accessing the course by the selected users.
- The total number of the selected courses that the user has completed during the reporting period / the total number of the selected users who have completed the course during the reporting period. A course is deemed to be completed if the user has passed, failed or completed all of the lessons within the course.

These values are also totalled across all of the selected users / courses at the end of the report.

Detailed Report

Figure 8-4 shows a sample detailed learning activity report: -



Close | Print | Save | E-mail | Export

Administration Reports
Report By User

Report Generated By: Tim Harding at 14:15:41 on 25 July 2012
Report Options: Sort By User Name; Sort By Course Title; Show Lesson Details; Show Objective Details; Start Date: Mar 2011; End Date: July 2012.

Access 2000					S		Used	Duration (hh:mm:ss)	Date Started	Date Completed
					Accessed 2 of 18	07/07/2011	08/07/2011	00:03:38	07/07/2011	-

Access and Screen Components

Attempts	First Score	Last Score	Best Score	Status	First Used	Last Used	Duration (hh:mm:ss)	Date Started	Date Completed
1	-	-	-	Incomplete	07/07/2011	07/07/2011	00:00:14	07/07/2011	-

Skills Assessment

Attempts	First Score	Last Score	Best Score	S		Used	Duration (hh:mm:ss)	Date Started	Date Completed
7	-	-	-	Incomplete	07/07/2011	08/07/2011	00:03:24	07/07/2011	-
	73% (8 / 11)	73% (8 / 11)	73% (8 / 11)	Passed	Access and Screen Components				
	18% (2 / 11)	18% (2 / 11)	18% (2 / 11)	Failed	Databases and Access Objects				
	0% (0 / 5)	0% (0 / 5)	0% (0 / 5)	Failed	Entering Data and Navigating				
	17% (1 / 6)	17% (1 / 6)	17% (1 / 6)	Failed	Creating Tables				
	0% (0 / 5)	0% (0 / 5)	0% (0 / 5)	Failed	Modifying the Table Design				
	12% (1 / 8)	12% (1 / 8)	12% (1 / 8)	Failed	Working with Records				
	20% (1 / 5)	20% (1 / 5)	20% (1 / 5)	Failed	Importing Files				
	-	-	-	Not Attempted	Creating Table Relationships				
	-	-	-	Not Attempted	Creating Forms				
	-	-	-	At	ms				
	-	-	-	Attempted					
	-	-	-	Not Attempted	Creating and Running Queries				
	-	-	-	Not Attempted	Select Query and Joining Tables				
	-	-	-	Not Attempted	Action and Crosstab Queries				
	-	-	-	Not Attempted	Using Reports				
	-	-	-	Not Attempted	Previewing and Printing				
	-	-	-	Not Attempted	Modifying Reports				

Figure 8-4: Sample Detailed Learning Activity Report

A detailed learning activity report can show up to three levels of detail for the learning activities of each of the selected users / courses. Each of these levels of detail is explained below: -

Course Information

This is the default level of detail for a learning activity report.

If the report is generated by user, the section of the report pertaining to each of the selected users will contain a single course information entry for each of the selected courses that the user has accessed during the reporting period.

If the report is generated by course, the section of the report pertaining to each of the selected courses will contain a single course information entry for each of the selected users who have accessed the course during the reporting period.

A course information entry shows the following for the user / course: -

- The course title / user name.
- The status of the user's learning activities for the course. Possible status values are: -
    - Not Attempted

      The user has accessed at least one of the lessons within the course but has not undertaken any learning activities.
    - Attempted *x* of *y*

      The user has undertaken learning activities in *x* lessons of the course and the course contains a total of *y* lessons.
    - Complete

      The user has passed, failed or completed all of the lessons within the course.
- The earliest date within the reporting period on which the user accessed the course.
- The latest date within the reporting period on which the user accessed the course.
- The total length of time during the reporting period that the user spent accessing the course.
- The date on which the user first accessed any of the lessons in the course.
- The date on which the user completed the course (if appropriate).

Lesson Information

Each course information entry can optionally contain a single lesson information entry for each of the lessons within the course for which a learning activity has been recorded during the reporting period.

A lesson information entry shows the following for the user / lesson: -

- The lesson title.
- The number of times that the user has accessed the lesson during the reporting period.

- The first score during the reporting period that the user achieved on the scored component of the lesson. This value is blank if a lesson does not contain a scored component. The score is formatted as percentage value followed by the score achieved and the maximum score possible. E.g. 86% (43 / 50).

- The last score during the reporting period that the user achieved on the scored component of the lesson. This value is blank if a lesson does not contain a scored component. The score is formatted as percentage value followed by the score achieved and the maximum score possible. E.g. 86% (43 / 50).

- The best score during the reporting period that the user achieved on the scored component of the lesson. This value is blank if a lesson does not contain a scored component. The score is formatted as percentage value followed by the score achieved and the maximum score possible. E.g. 86% (43 / 50).

- The status of the user's learning activity for the lesson. Possible status values are: -

    - <u>Not Attempted</u>

      The user has accessed the lesson but has not undertaken any learning activities.

    - <u>Incomplete</u>

      The user has undertaken learning activities within the lesson but has not yet completed it.

    - <u>Complete</u>

      The user has completed the lesson. The lesson is deemed to be complete if the user has passed, failed or completed all of the objectives defined within the lesson.

    - <u>Passed</u>

      The lesson has a scored component and the user has achieved a score greater than the associated mastery score.

    - <u>Failed</u>

      The lesson has a scored component and the user has achieved a score less than the associated mastery score.

- The earliest date within the reporting period on which the user accessed the lesson.

- The latest date within the reporting period on which the user accessed the lesson.

- The total length of time during the reporting period that the user spent accessing the lesson.

- The date on which the user first accessed the lesson.

- The date on which the user completed the lesson (if appropriate).

Objective Information

Each lesson information entry can optionally contain a single objective information entry for each of the objectives that are defined within the lesson for which a learning activity has been recorded during the reporting period.

Note: It is not compulsory for courseware vendors to define objectives within a lesson and therefore, not all lessons will have associated objective information.

An objective information entry shows the following for the user / objective: -

- The first score during the reporting period that the user achieved on the scored component of the objective. This value is blank if the objective does not contain a scored component. The score is formatted as a percentage value followed by the score achieved and the maximum score possible. E.g. 86% (43 / 50).
- The last score during the reporting period that the user achieved on the scored component of the objective. This value is blank if the objective does not contain a scored component. The score is formatted as a percentage value followed by the score achieved and the maximum score possible. E.g. 86% (43 / 50).
- The best score during the reporting period that the user achieved on the scored component of the objective. This value is blank if the objective does not contain a scored component. The score is formatted as a percentage value followed by the score achieved and the maximum score possible. E.g. 86% (43 / 50).
- The status of the user's learning activity for the objective. Possible status values are: -
    - <u>Not Attempted</u>

      The user has accessed the objective but has not undertaken any learning activities.
    - <u>Incomplete</u>

      The user has undertaken learning activities within the objective but has not yet completed it.
    - <u>Complete</u>

      The user has completed the objective.
    - <u>Passed</u>

      The objective has a scored component and the user has achieved a score greater than the associated mastery score.
    - <u>Failed</u>

      The objective has a scored component and the user has achieved a score less than the associated mastery score.
- The objective title.

Usage Type Summary Report

Figure 8-5 shows an example of a Usage Type Summary Report: -

Close | Print | Save | E-mail | Export

Administration Reports
Usage Type Report

Report Generated By: Tim Harding at 15:14:54 on 25 July 2012
Report Options: Sort By User Name; Sort By Course Title; Start Date: June 2012; End Date: July 2012.

Initial Usage

User Name	Course Title	Lesson Title	Duration	Attempts	First Used	Last Used	Date Started
[illegible]	Handling Violence and Aggression at Work	Handling Violence and Aggression at Work	00:44:56	1	10/07/2012	10/07/2012	10/07/2012
[illegible]	Personal Safety in Other People's Homes and Premises	Personal Safety in Other People's Homes and Premises	00:02:41	1	10/07/2012	10/07/2012	10/07/2012
[illegible]	An Overview of Performance Appraisal v2	An Overview of Performance Appraisal	00:00:40	1	02/07/2012	02/07/2012	02/07/2012
2 Users	**3 Courses**	**3 Lessons**	**00:48:17**				

In-Progress Usage

User Name	Course Title	Lesson Title	Duration	Attempts	First Used	Last Used	Date Started
[illegible]	The Bribery Act 2010	Identifying and Avoiding Bribery in Organisations	00:20:56	1	26/06/2012	26/06/2012	23/03/2012
1 Users	**1 Courses**	**1 Lessons**	**00:20:56**				

Completion Usage

User Name	Course Title	Lesson Title	Duration	Attempts	First Used	Last Used	Date Completed
[illegible]	An Overview of Performance Appraisal v2 (Non-Audio)	An Overview of Performance Appraisal	00:18:18	1	02/07/2012	02/07/2012	02/07/2012
1 Users	**1 Courses**	**1 Lessons**	**00:18:18**				

Post-Completion Usage

User Name	Course Title	Lesson Title	Duration	Attempts	First Used	Last Used	Date Completed
0 Users	**0 Courses**	**0 Lessons**	**00:00:00**				

Overall Totals

4 Users	**5 Courses**	**5 Lessons**	**01:27:31**	

Figure 8-5: Sample Usage Type Summary Report

A Usage Type Summary Report summarises the type of usage within the reporting period of all of the courses that are allocated to the reporting site or group(s) by all of the users that are members of the reporting site or group(s). The report is divided into four separate areas: -

- Initial Usage

  This area shows a summary of the usage of lessons during the reporting period that have not already been started by users before the reporting period.

- In-Progress Usage

  This area shows a summary of the usage of lessons during the reporting period that have already been started by users before the reporting period but have not yet been completed.

- Completion Usage

  This area shows a summary of the usage of lessons within the reporting period that have been completed by users during the reporting period.

- Post-Completion Usage

  This area shows a summary of the usage of lessons during the reporting period that have already been completed by users before the reporting period (i.e. refresher training etc.).

Each of the entries in the four areas of the report shows the following information: -

- The users name.
- The course title.
- The lesson title.
- The total length of time during the reporting period that the user spent accessing the lesson.
- The number of times that the user accessed the lesson during the reporting period.
- The earliest date within the reporting period on which the user accessed the lesson.
- The latest date within the reporting period on which the user accessed the lesson.
- The date on which the lesson was first used / completed by the user (as appropriate).

The total length of time during the reporting period that the users spent accessing the lessons is also totalled at the end of each of the four report areas and also at the end of the report. The figure for the total duration of usage at the end of the report therefore represents the total length of time spent on learning activities by the entire reporting site or group(s) during the reporting period.

Zero Usage Summary Report

Figure 8-6 shows an example of a Zero Usage Summary Report: -

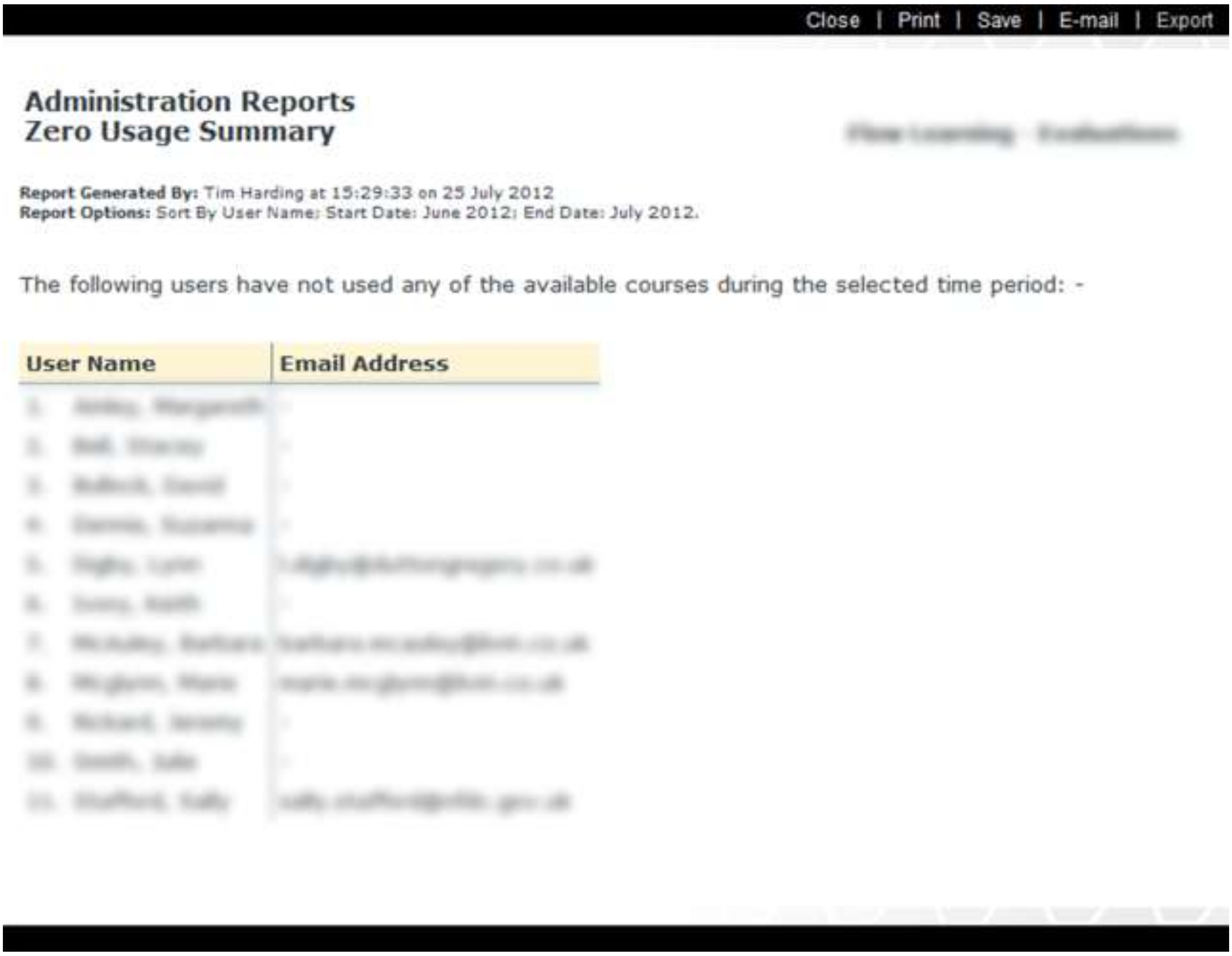


Figure 8-6: Sample Zero Usage Summary Report

A Zero Usage Summary Report produces a list of all of the users that are allocated to the reporting site or group(s) who have not used any of the courses that are allocated to the reporting site or group(s) within the reporting period.

Learning Tool Reports

The Learning Tool Reports menu item is only available if any of the optional learning tool LMS add-ons have been installed and assigned to the site. Selecting the Learning Tool Reports menu item accesses the Administration Learning Tool Reports menu.

Figure 8-7 shows the Administration Learning Tool Reports menu: -

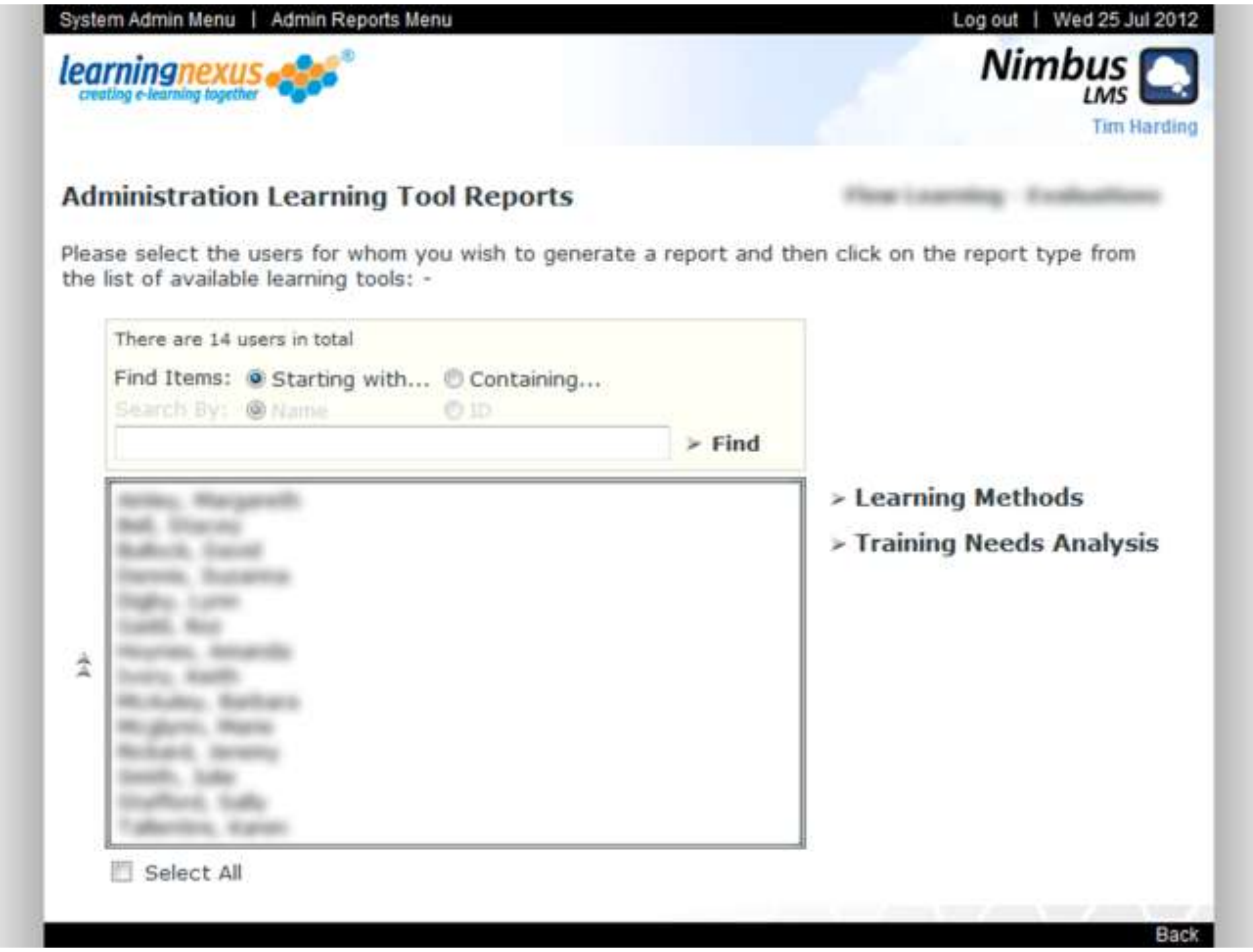


Figure 8-7: Administration Learning Tool Reports Menu

The administration learning tool reports menu consists of an 'Available Users' list which shows all of the users who are members of the site or group(s) for which the desired report is to be generated, a 'Select All' check box which can be used to select / deselect all of the users in the 'Available Users' list and a separate menu item for each of the reports that are available for each of the installed learning tools. The 'Available Users' list is formatted and sorted using the options selected in the previous administration reports menu and items in the list can be located using the 'Find Items' functions.

Items in the 'Available Users' list can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations. When the users for which the report is to be generated have been selected, the report is generated by clicking on the appropriate report menu item. All of the learning activity reports can be printed and saved by using the appropriate items on the menu bar at the top of the report.

Learning Methods

Learning Methods is an optional LMS add-on tool that has been designed to: -

- Show which learning methods work best for each person
- Reveal individual dislikes for any learning methods
- Help training managers to match learning methods to learning needs
- Help trainers to avoid mismatching individuals and learning methods
- Improve cost effective investment in training through a focused, researched matching of learning methods to learning needs
- Help to avoid or minimize over and under spending of training resources

The Learning Methods report menu is accessed by clicking the 'Learning Methods' element in the administration learning tool reports menu.

Figure 8-8 shows the Learning Methods report menu: -

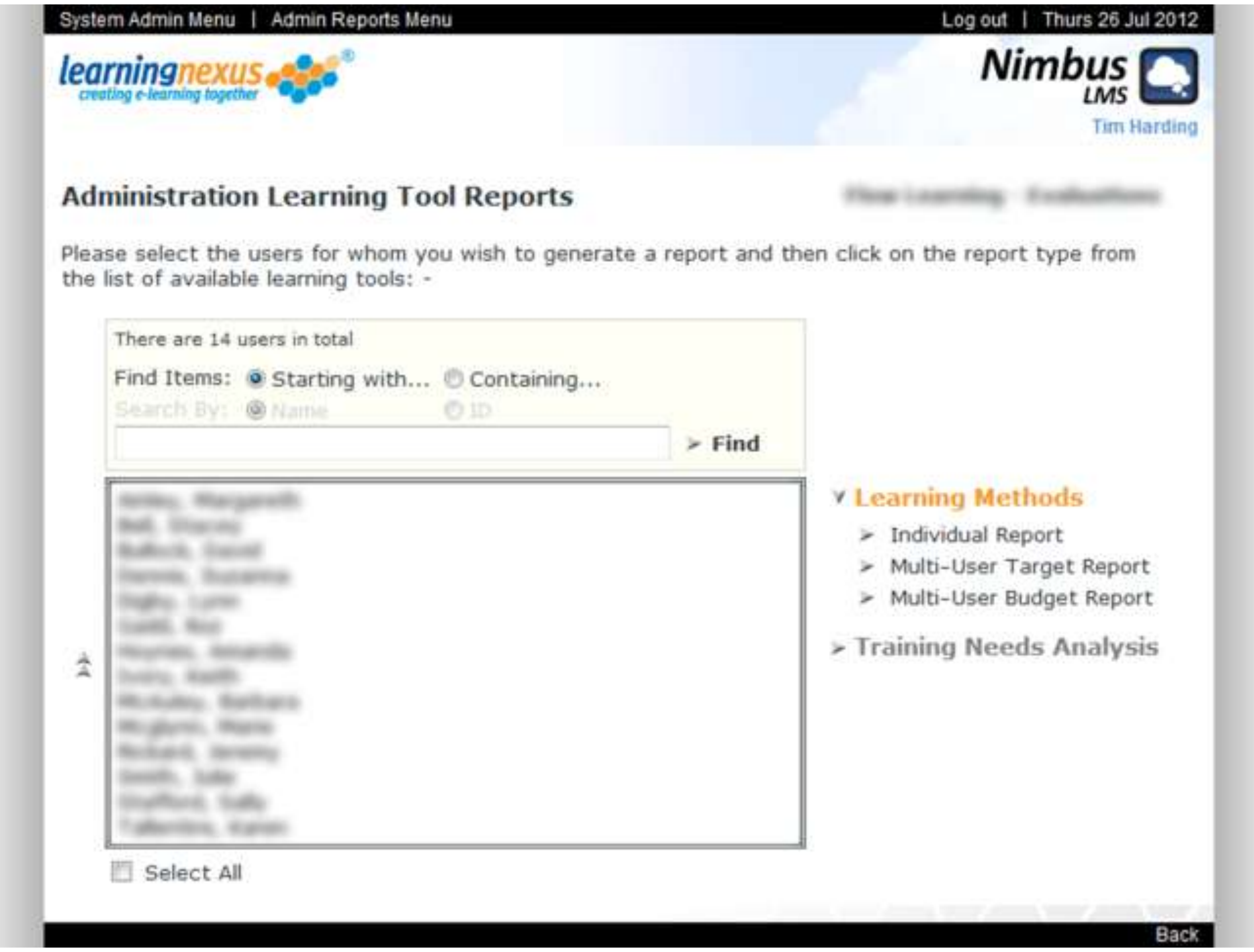


Figure 8-8: Learning Methods Report Menu

There are three types of reports available for the Learning Methods tool: -

- <u>Individual Report</u>

  This report shows the preferred learning methods for a single user derived from the selected individual's responses to the Learning Methods questionnaire.

- Multi-User Target Report

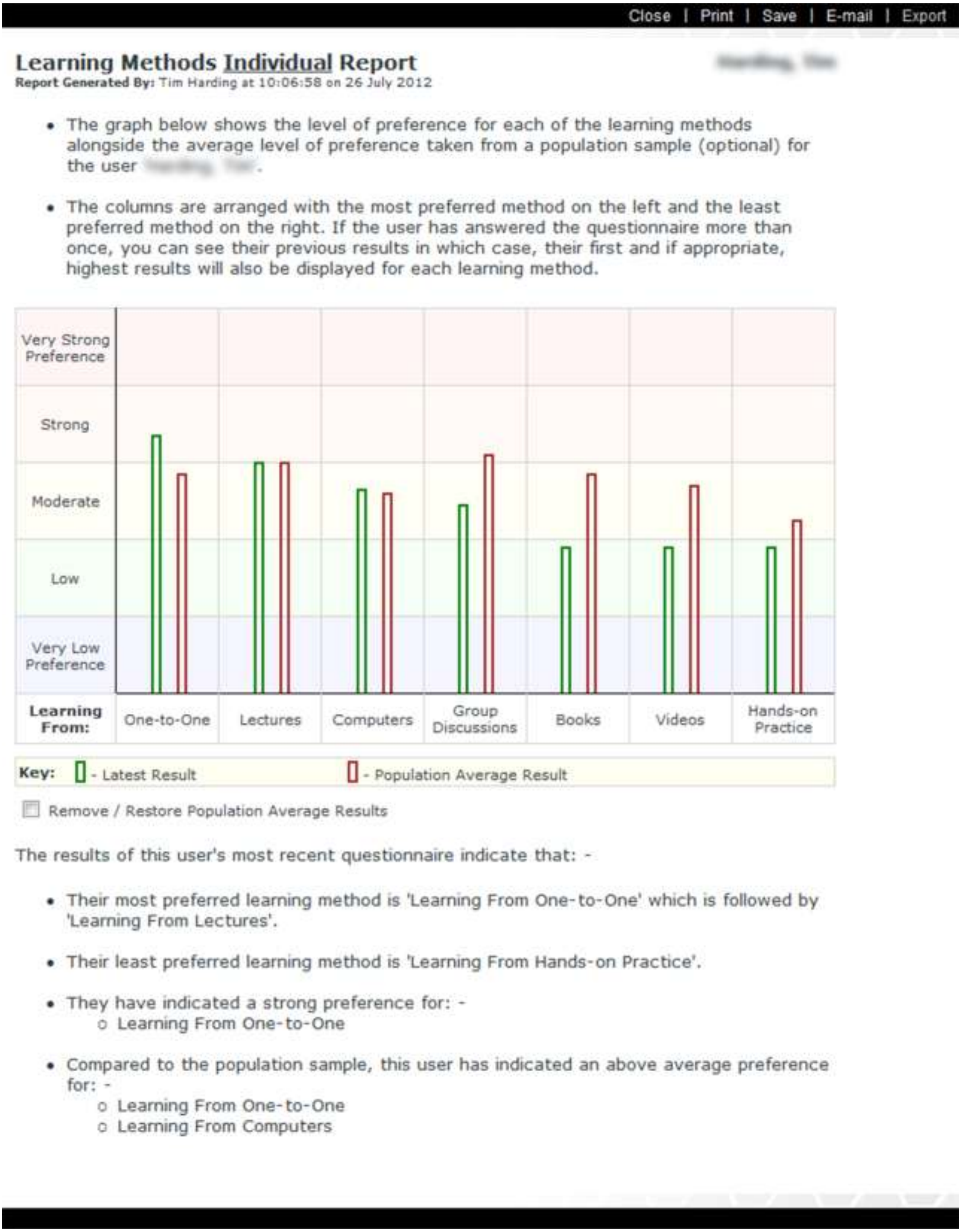
  This report identifies the most appropriate learning method for each of the selected users derived from their most recent responses to the Learning Methods questionnaire.

- Multi-User Budget Report

  This report identifies the overall learning method preferences for the selected users and is derived by averaging their most recent responses to the Learning Methods questionnaire.

Individual Report

Figure 8-9 shows a sample Learning Methods Individual Report: -



Close | Print | Save | E-mail | Export

Learning Methods Individual Report

Report Generated By: Tim Harding at 10:06:58 on 26 July 2012

- The graph below shows the level of preference for each of the learning methods alongside the average level of preference taken from a population sample (optional) for the user [illegible].
- The columns are arranged with the most preferred method on the left and the least preferred method on the right. If the user has answered the questionnaire more than once, you can see their previous results in which case, their first and if appropriate, highest results will also be displayed for each learning method.

Remove / Restore Population Average Results

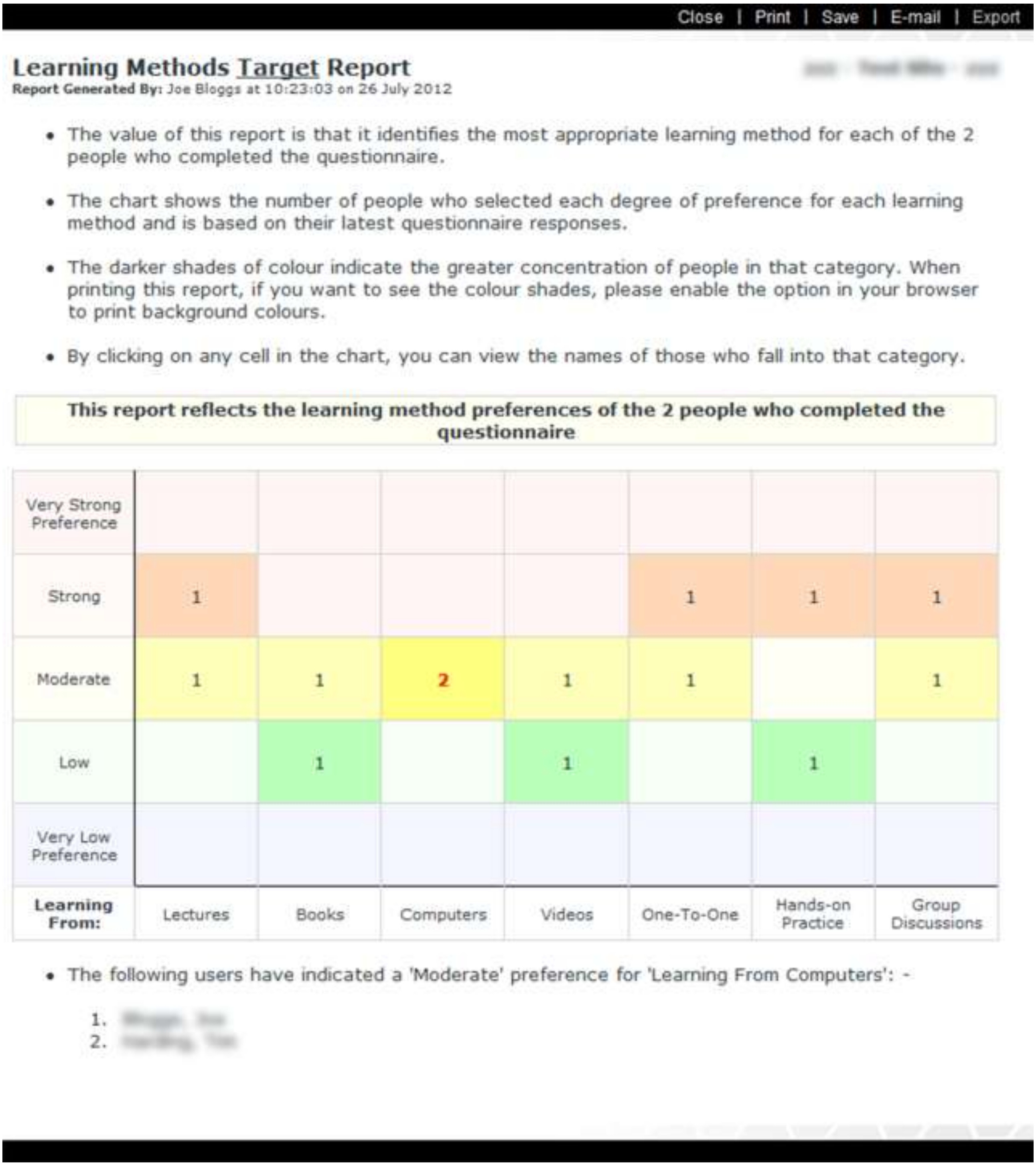
The results of this user's most recent questionnaire indicate that: -

- Their most preferred learning method is 'Learning From One-to-One' which is followed by 'Learning From Lectures'.
- Their least preferred learning method is 'Learning From Hands-on Practice'.
- They have indicated a strong preference for: -
  - Learning From One-to-One
- Compared to the population sample, this user has indicated an above average preference for: -
  - Learning From One-to-One
  - Learning From Computers

Figure 8-9: Sample Learning Methods Individual Report

Multi-User Target Report

Figure 8-10 shows a sample Learning Methods Target Report: -



Close | Print | Save | E-mail | Export

Learning Methods Target Report

Report Generated By: Joe Bloggs at 10:23:03 on 26 July 2012

- The value of this report is that it identifies the most appropriate learning method for each of the 2 people who completed the questionnaire.
- The chart shows the number of people who selected each degree of preference for each learning method and is based on their latest questionnaire responses.
- The darker shades of colour indicate the greater concentration of people in that category. When printing this report, if you want to see the colour shades, please enable the option in your browser to print background colours.
- By clicking on any cell in the chart, you can view the names of those who fall into that category.

This report reflects the learning method preferences of the 2 people who completed the questionnaire

Very Strong Preference							
Strong	1				1	1	1
Moderate	1	1	2	1	1		1
Low		1		1		1	
Very Low Preference							
Learning From:	Lectures	Books	Computers	Videos	One-To-One	Hands-on Practice	Group Discussions

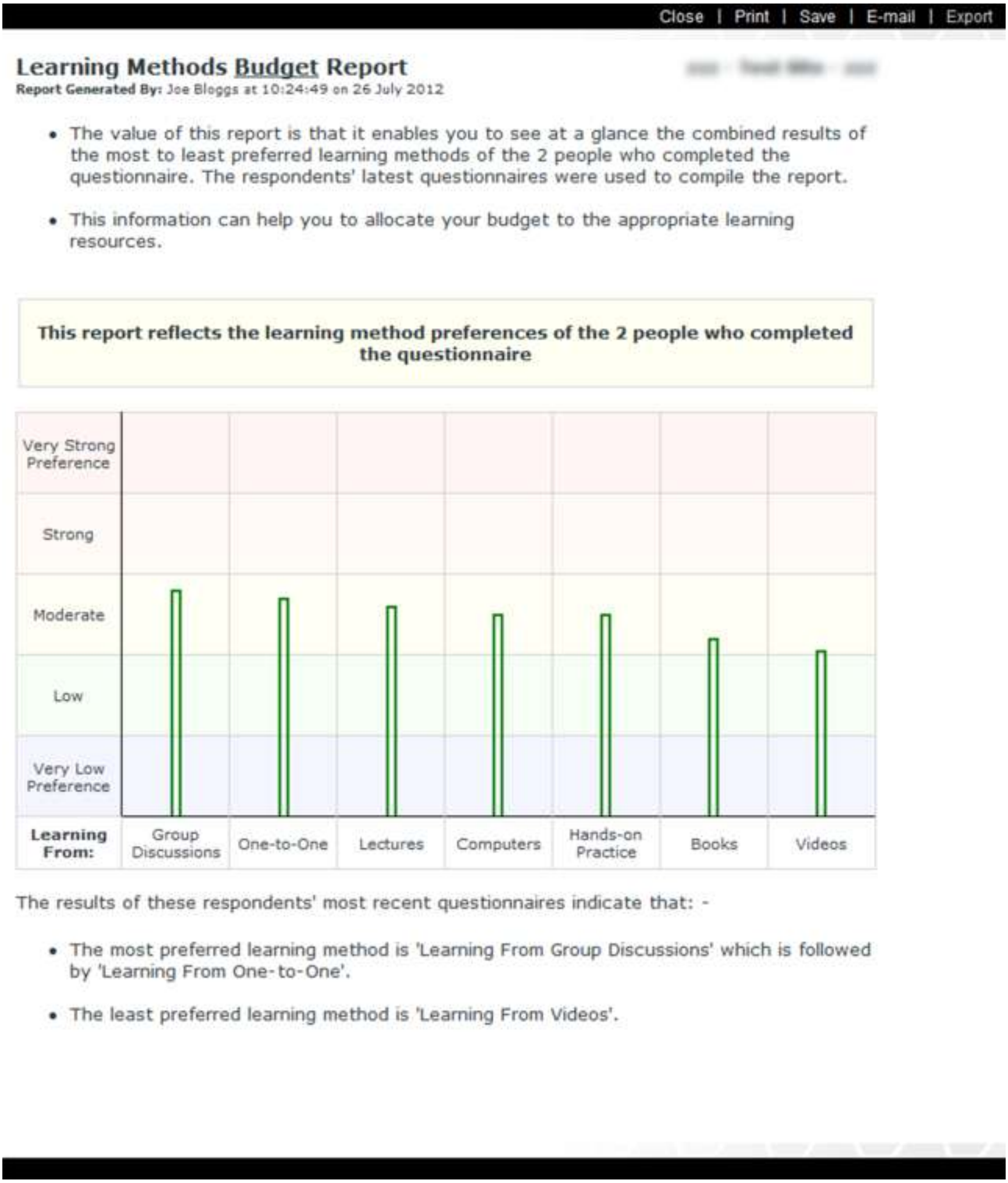
- The following users have indicated a 'Moderate' preference for 'Learning From Computers': -

1. [illegible]
2. [illegible]

Figure 8-10: Sample Learning Methods Target Report

Multi-User Budget Report

Figure 8-11 shows a sample Learning Methods Budget Report: -


Close | Print | Save | E-mail | Export

Learning Methods Budget Report

Report Generated By: Joe Bloggs at 10:24:49 on 26 July 2012

- The value of this report is that it enables you to see at a glance the combined results of the most to least preferred learning methods of the 2 people who completed the questionnaire. The respondents' latest questionnaires were used to compile the report.
- This information can help you to allocate your budget to the appropriate learning resources.

This report reflects the learning method preferences of the 2 people who completed the questionnaire

The results of these respondents' most recent questionnaires indicate that: -

- The most preferred learning method is 'Learning From Group Discussions' which is followed by 'Learning From One-to-One'.
- The least preferred learning method is 'Learning From Videos'.

Figure 8-11: Sample Learning Methods Budget Report

Training Needs Analysis

Training Needs Analysis is an optional LMS add-on tool that has been designed to: -

- Allow users to assess the importance of topics to their job effectiveness
- Allow users to rate their current competence in these topics
- Calculate the level of training need for these topics

The Training Needs Analysis report menu is accessed by clicking the 'Training Needs Analysis' element in the administration learning tool reports menu.

Figure 8-12 shows the Training Needs Analysis report menu: -

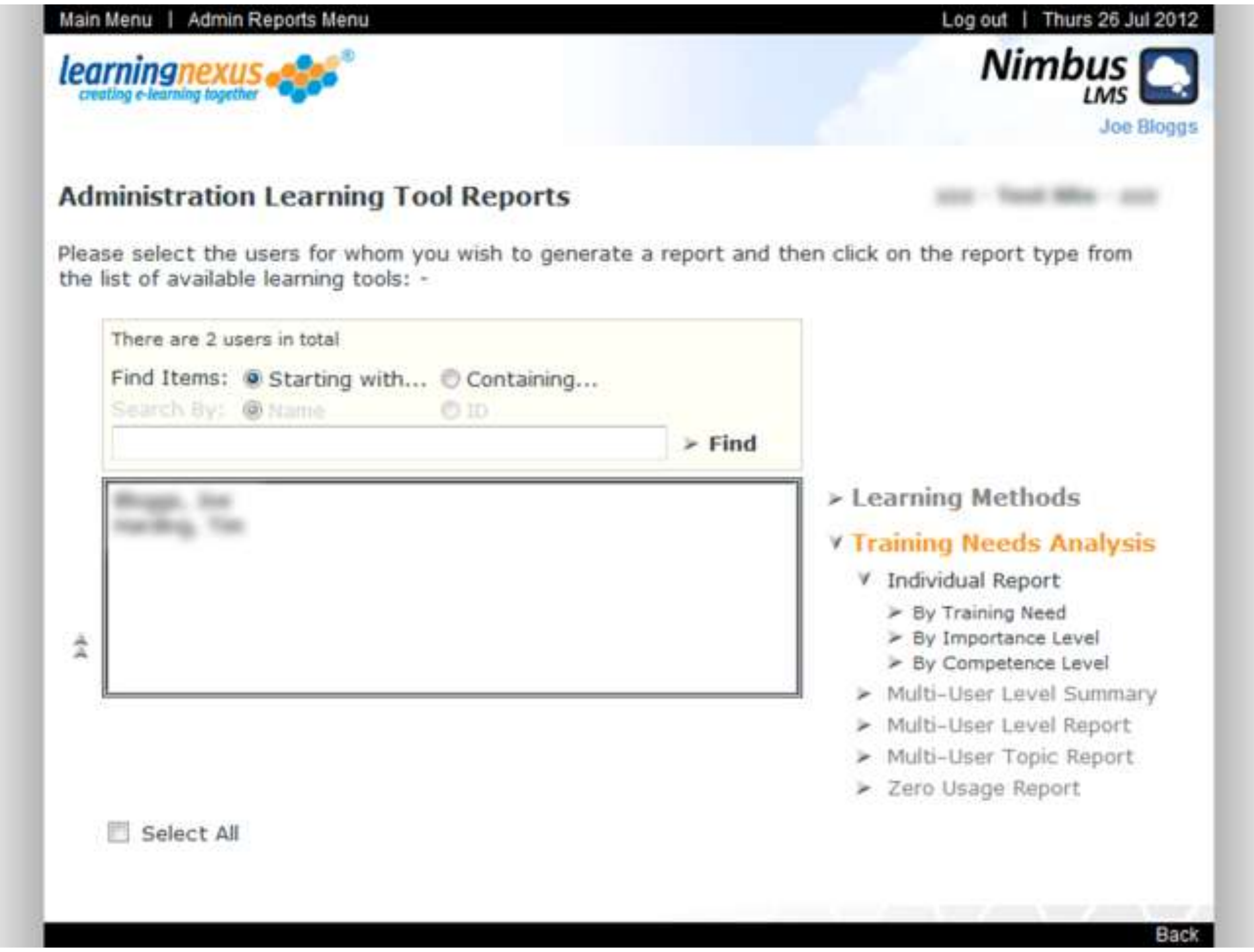


Figure 8-12: Training Needs Analysis Report Menu

There are five types of reports available for the Training Needs Analysis tool: -

- <u>Individual Report</u>

  This report shows the level of training need, level of importance for job effectiveness and level of current competence for each of the topics in all of the subject areas that the selected user has chosen, derived from the selected individual's responses to the Training Needs Analysis questionnaires.

- <u>Multi-User Level Summary</u>

  This report shows the number of the selected users for whom the level of training need (or optionally the level of importance for job effectiveness or level of current competence) falls into the selected range for each of the topics.

- Multi-User Level Report

  This report shows all of the topics for which the level of training need (or optionally the level of importance for job effectiveness or level of current competence) for all of the selected users falls into the selected range.

- Multi-User Topic Report

  This report shows the level of training need, level of importance for job effectiveness and level of current competence for all of the selected users for the selected topic.

- Zero Usage Report

  This report shows all of the selected users who have not completed a Training Needs Analysis for any of the available subject areas.

Each of these reports except the Zero Usage Report has three variations which determine the order in which the information is arranged in the report: -

- By Training Need

  This option arranges the reports by level of training need followed by level of importance for job effectiveness and then level of current competence.

- By Importance Level

  This option arranges the reports by level of importance for job effectiveness followed by level of training need and then level of current competence.

- By Competence Level

  This option arranges the reports by level of current competence followed by level of training need and then level of importance for job effectiveness.

Individual Report

Figure 8-13 shows a sample Training Needs Analysis individual report: -

Close | Print | Save | E-mail | Export

Training Needs Analysis Individual Report
By Level of Training Need

[illegible]

Report Generated By: Joe Bloggs at 10:30:32 on 26 July 2012

- The table below shows the level of training need for each of the topics in all of the subject areas that the user [illegible] has chosen along with the level of importance for job effectiveness and current competence for each topic.
- The highest level of training need topics are listed first and the lowest last.
- The percentage in the first column shows the level of training need, the second column shows the level of importance for job effectiveness and the third column shows the current competence for each topic.
- You can see what each percentage represents by hovering your mouse over the relevant number.
- The level of training need for a topic is calculated by weighting the importance of the topic for job effectiveness with the inverse of the current competence; the higher the importance and the lower the competence, the greater is the training need for that topic.

Urgent Training Need (61 - 80%)				
64%	70%	8%	**1. Safety at Heights**	Health and Safety Skills

High Training Need (41 - 60%)				
55%	55%	0%	**2. Environmental Management**	Health and Safety Skills
46%	75%	38%	**3. First Aid**	Health and Safety Skills

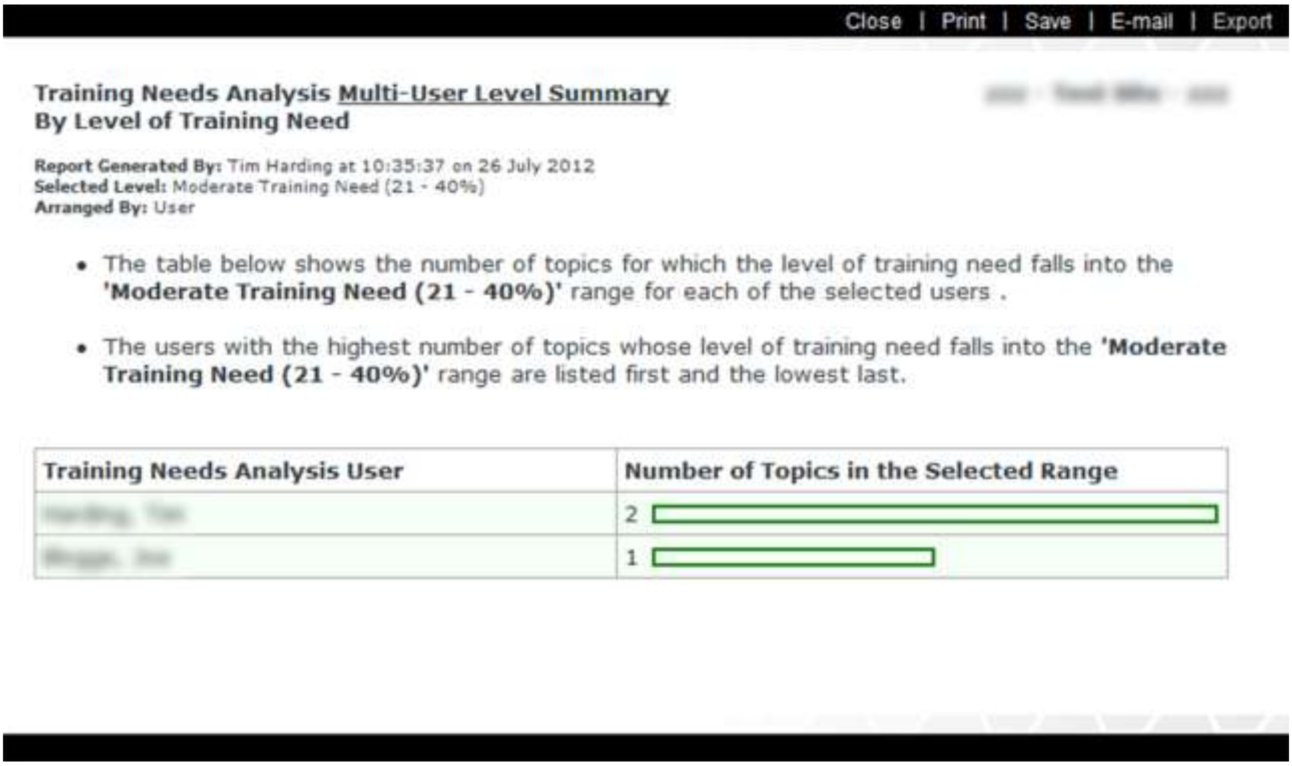
Moderate Training Need (21 - 40%)				
24%	60%	60%	**4. Risk Assessment**	Health and Safety Skills

Low Training Need (1 - 20%)				
20%	90%	78%	**5. Personal Protective Equipment**	Health and Safety Skills
16%	33%	50%	**6. Electrical Safety**	Health and Safety Skills
15%	20%	23%	**7. Fire Safety**	Health and Safety Skills
9%	73%	88%	**8. Driving Safety**	Health and Safety Skills

Figure 8-13: Sample Training Needs Analysis Individual Report

Multi-User Level Summary

Figure 8-14 shows a sample Training Needs Analysis Multi-User Level Summary Report. In this case, the report has been generated using the 'By Training Need' and 'High Training Need' options: -


Close | Print | Save | E-mail | Export

Training Needs Analysis <u>Multi-User Level Summary</u>
By Level of Training Need

Report Generated By: Tim Harding at 10:35:37 on 26 July 2012
Selected Level: Moderate Training Need (21 - 40%)
Arranged By: User

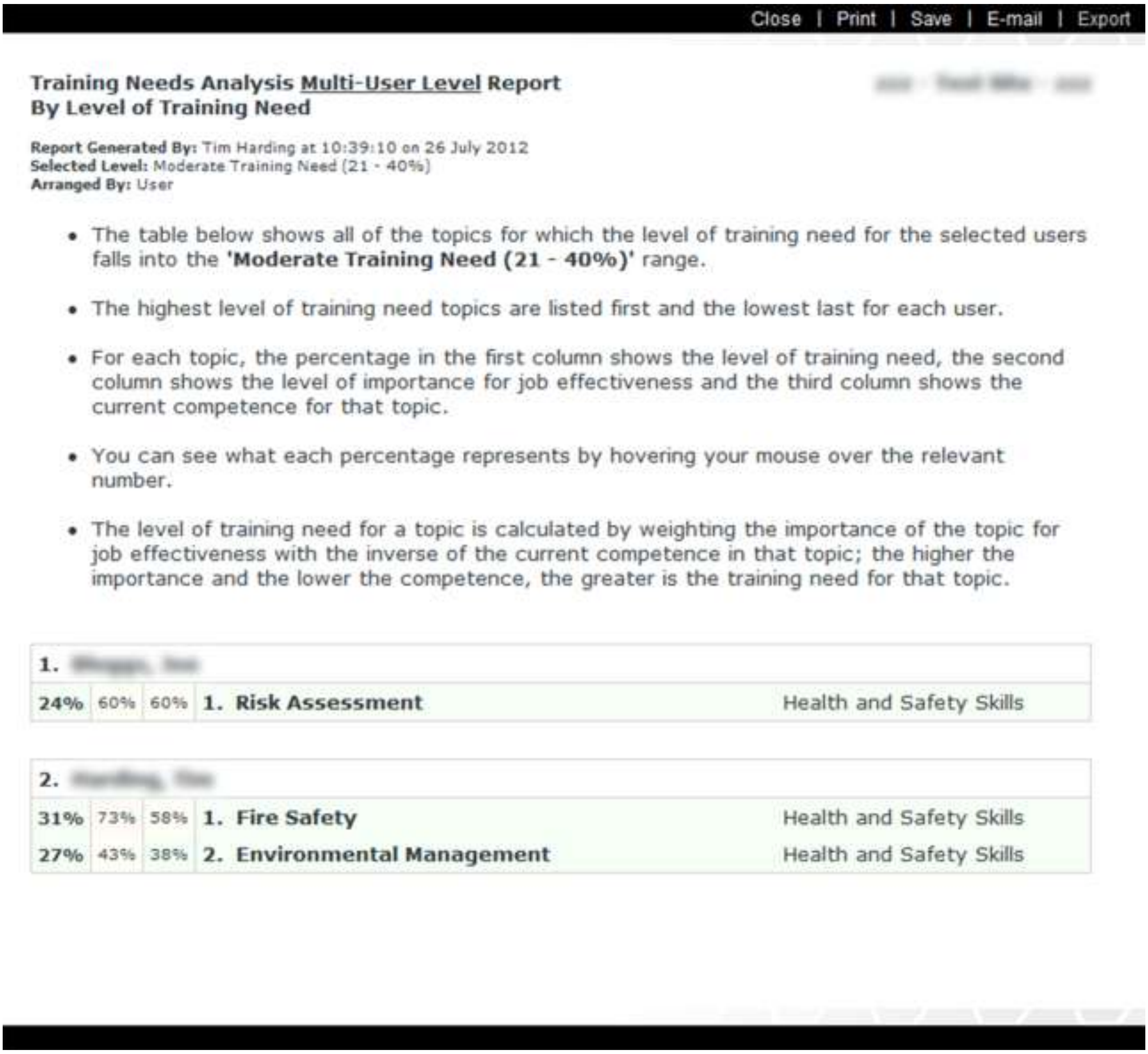
- The table below shows the number of topics for which the level of training need falls into the **'Moderate Training Need (21 - 40%)'** range for each of the selected users .
- The users with the highest number of topics whose level of training need falls into the **'Moderate Training Need (21 - 40%)'** range are listed first and the lowest last.

Training Needs Analysis User	Number of Topics in the Selected Range
[illegible]	2
[illegible]	1

Figure 8-14: Sample Training Needs Analysis Multi-User Level Summary Report

Multi-User Level Report

Figure 8-15 shows a sample Training Needs Analysis Multi-User Level report: -



Close | Print | Save | E-mail | Export

Training Needs Analysis Multi-User Level Report
By Level of Training Need

Report Generated By: Tim Harding at 10:39:10 on 26 July 2012
Selected Level: Moderate Training Need (21 - 40%)
Arranged By: User

- The table below shows all of the topics for which the level of training need for the selected users falls into the **'Moderate Training Need (21 - 40%)'** range.
- The highest level of training need topics are listed first and the lowest last for each user.
- For each topic, the percentage in the first column shows the level of training need, the second column shows the level of importance for job effectiveness and the third column shows the current competence for that topic.
- You can see what each percentage represents by hovering your mouse over the relevant number.
- The level of training need for a topic is calculated by weighting the importance of the topic for job effectiveness with the inverse of the current competence in that topic; the higher the importance and the lower the competence, the greater is the training need for that topic.

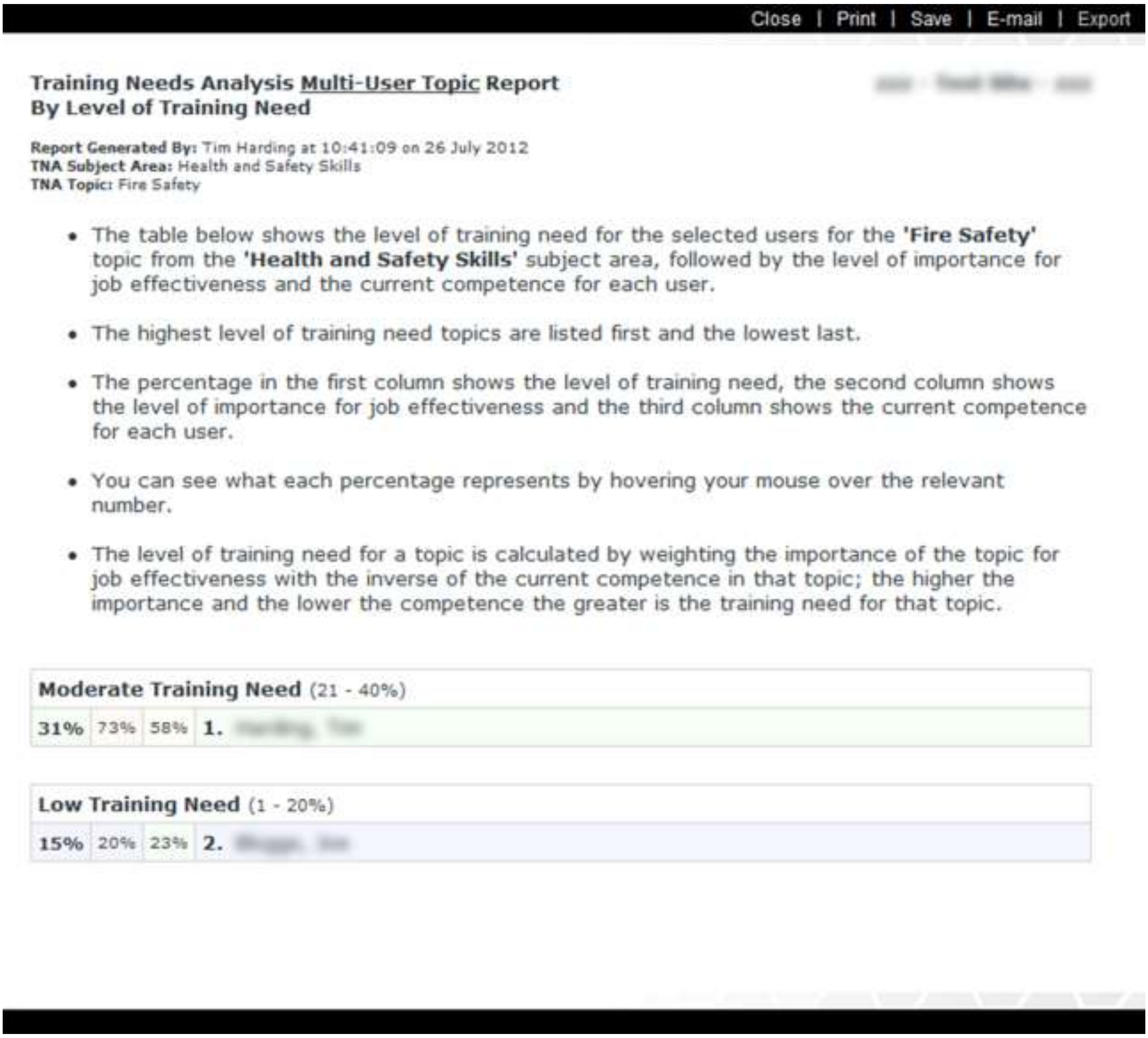
1. [illegible]				
24%	60%	60%	**1. Risk Assessment**	Health and Safety Skills

2. [illegible]				
31%	73%	58%	**1. Fire Safety**	Health and Safety Skills
27%	43%	38%	**2. Environmental Management**	Health and Safety Skills

Figure 8-15: Sample Training Needs Analysis Multi-User Level Report

Multi-User Topic Report

Figure 8-16 shows a sample Training Needs Analysis Multi-User Topic report: -



Close | Print | Save | E-mail | Export

Training Needs Analysis Multi-User Topic Report
By Level of Training Need

Report Generated By: Tim Harding at 10:41:09 on 26 July 2012
TNA Subject Area: Health and Safety Skills
TNA Topic: Fire Safety

- The table below shows the level of training need for the selected users for the **'Fire Safety'** topic from the **'Health and Safety Skills'** subject area, followed by the level of importance for job effectiveness and the current competence for each user.
- The highest level of training need topics are listed first and the lowest last.
- The percentage in the first column shows the level of training need, the second column shows the level of importance for job effectiveness and the third column shows the current competence for each user.
- You can see what each percentage represents by hovering your mouse over the relevant number.
- The level of training need for a topic is calculated by weighting the importance of the topic for job effectiveness with the inverse of the current competence in that topic; the higher the importance and the lower the competence the greater is the training need for that topic.

Moderate Training Need (21 - 40%)			
31%	73%	58%	**1.** [illegible]

Low Training Need (1 - 20%)			
15%	20%	23%	**2.** [illegible]

Figure 8-16: Sample Training Needs Analysis Multi-User Topic Report

Zero Usage Report

Figure 8-17 shows a sample Training Needs Analysis Zero Usage Report: -


Close | Print | Save | E-mail | Export

Training Needs Analysis Zero Usage Report

Report Generated By: Tim Harding at 10:43:54 on 26 July 2012

The table below shows all of the selected users who have not yet completed a Training Needs Analysis for any of the available subject areas.

User Name	Email Address
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]
[illegible]	[illegible]

Figure 8-17: Sample Training Needs Analysis Zero Usage Report

Certificate Report

Figure 8-18 shows an example of the Achievement Certificates by User report: -

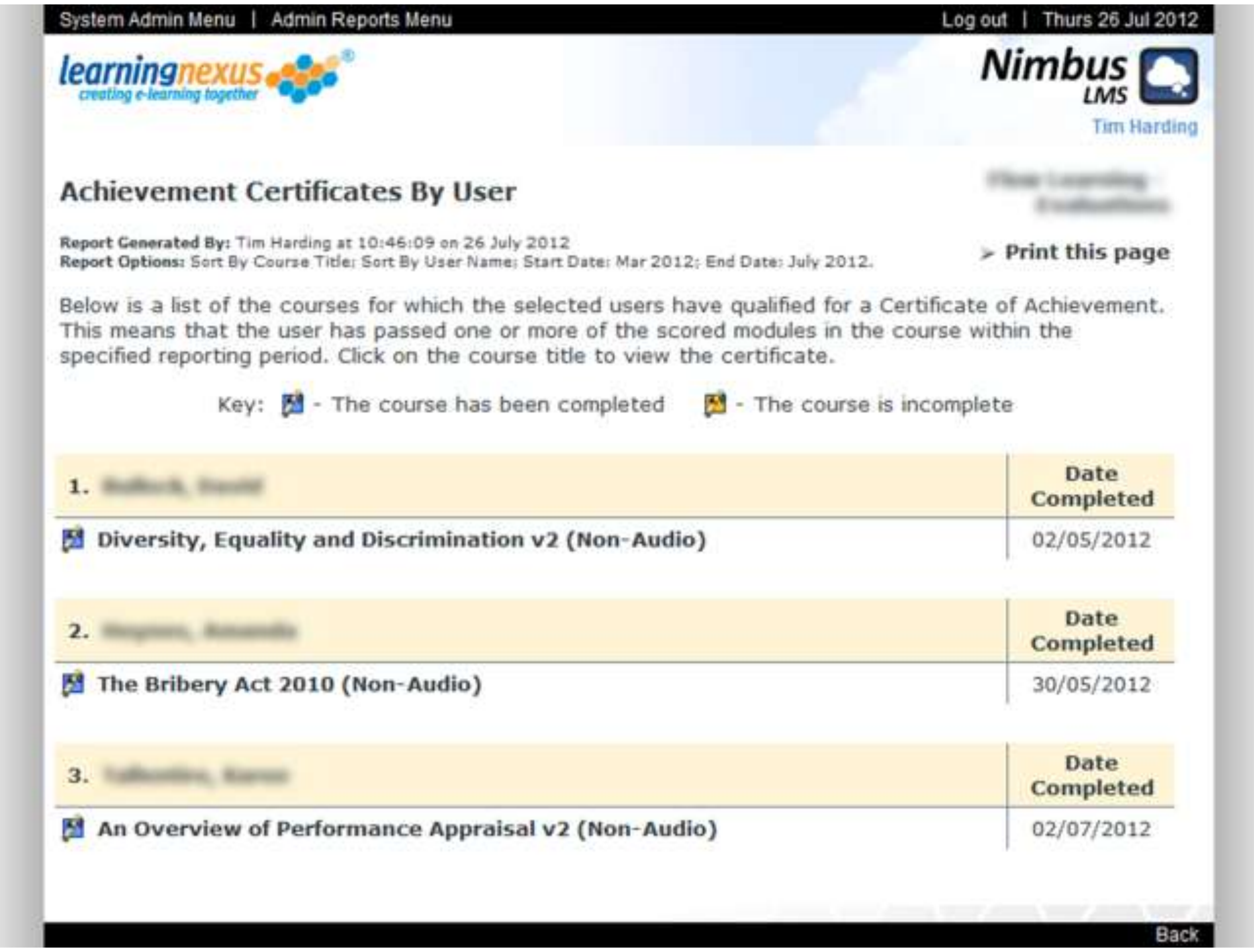


Figure 8-18: Achievement Certificates by User Example

If the certificate report is generated by user, the section of the report pertaining to each of the selected users will show a list of all of the selected courses for which the user has qualified for a certificate within the reporting period and the date on which the achievement or completion occurred.

If the certificate report is generated by course, the section of the report pertaining to each of the selected courses will show a list of all of the selected users that have qualified for a certificate within the reporting period and the date on which the achievement or completion occurred.

Two types of certificate report can be generated: -

- <u>Achievement Certificates</u>

  A user qualifies for a certificate of achievement if they have passed one or more of the scored lessons within the course. The entries in this report are preceded by a coloured certificate icon which indicates whether or not the user has also completed the course.

  - indicates that the user has also completed the course

  - indicates that the user has not yet completed the course

- Completion Certificates

  A user qualifies for a certificate of completion if they have completed all of the lessons within the course but have not qualified for an achievement certificate either because the course does not contain any scored lessons or the user has failed to pass any of the scored lessons within the course. The entries in this report are preceded by a coloured certificate icon which indicates which of these conditions applies.

   - indicates that the course does not contain any scored lessons

   - indicates that the user has failed to pass any of the scored lessons

A certificate is generated by clicking on the appropriate course title / user name in the certificate report and the certificate can be printed and saved by using the appropriate items in the menu bar at the top of the certificate. If the settings for the LMS site specify that the customisable logos are displayed on the certificate, the option to save the certificate is disabled.

Figure 8-19 shows and example of a Certificate of Achievement with the site options for showing the certificate border and the customisable logos enabled: -


Close | Print | Save | E-mail | Export

Certificate of Achievement

Safeguarding Children

This is to certify that on 26/07/2012

completed this course with an average score of

80%

after attempting the 1 scored lesson(s) in this course.

26 July 2012

Authorised Signatory

Your logo could go here

learningnexus creating e-learning together

Conducted by Learning Nexus Ltd.

Figure 8-19: Certificate of Achievement Example

9. Generating Risk Assessment Reports

The optional LMS ‘Risk Assessment Module’ allows LMS administrators and group managers to perform tasks and generate reports that are specific to Health and Safety Risk Assessments. This module also allows notes to be created and stored against specific users’ risk records detailing the precise nature of the risk, actions taken to resolve the risk etc.

The risk reports menu can be accessed from several different areas of the LMS in order to generate risk assessment reports for a site or for groups that are defined within the site.

Figure 9-1 shows the risk reports menu: -

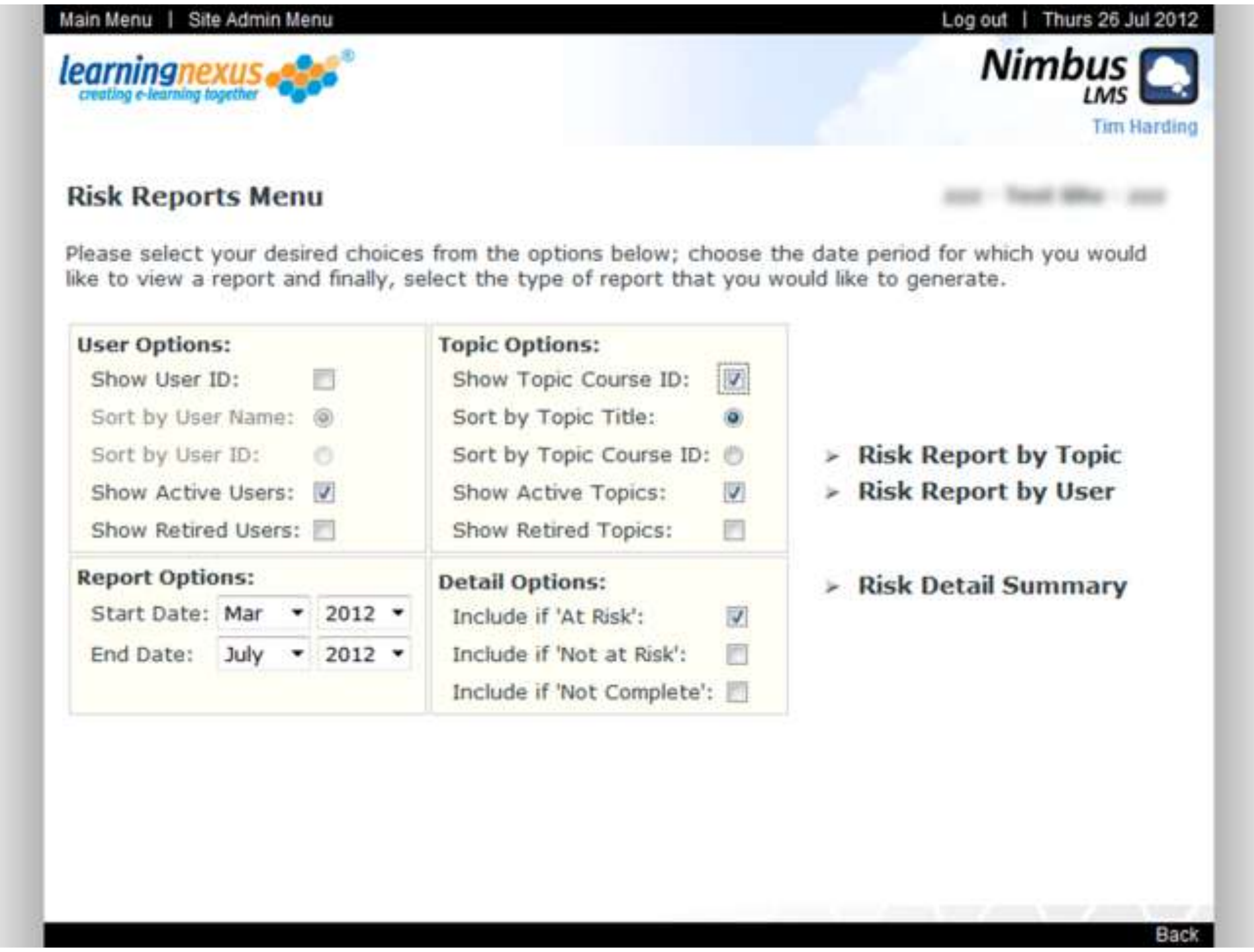


Figure 9-1: Risk Reports Menu

The risk reports menu consists of four sets of report options: -

- User Options

  These settings determine if the user ID is to be shown in the report and if the users are to be sorted by name or by ID. The default settings are that the user ID is not shown and the users are sorted by name.

- Topic Options

  These settings determine if the course ID is to be shown in the report and if the courses are to be sorted by title or by ID. The default settings are that the course ID is not shown and the courses are sorted by title.

- Report Options

  This setting determines the date period during which risk assessment data is to be reported on. The default setting is the entire period for which risk assessment data is available.

- Detail Options

  A risk assessment report can include three possible categories of risk: -

  - Show if 'At Risk' (default)
  - Show if 'Not at Risk'
  - Show if 'Not Complete'

The risk reports menu also contains the following menu items: -

- Risk Report by Topic

  This menu item generates a report detailing the risk status of each of the selected users for each of the selected risk assessment topics.

- Risk Report by User

  This menu item generates a report detailing the risk status of each of the selected risk assessment topics for each of the selected users.

- Risk Detail Summary

  This menu item generates a report detailing the numbers of the selected users who fall into each of the selected risk detail option categories for each of the specific risk items of the selected risk assessment topics.

Selecting any of the menu items listed above accesses the risk report options menu. Figure 9-2 shows the risk report options menu: -

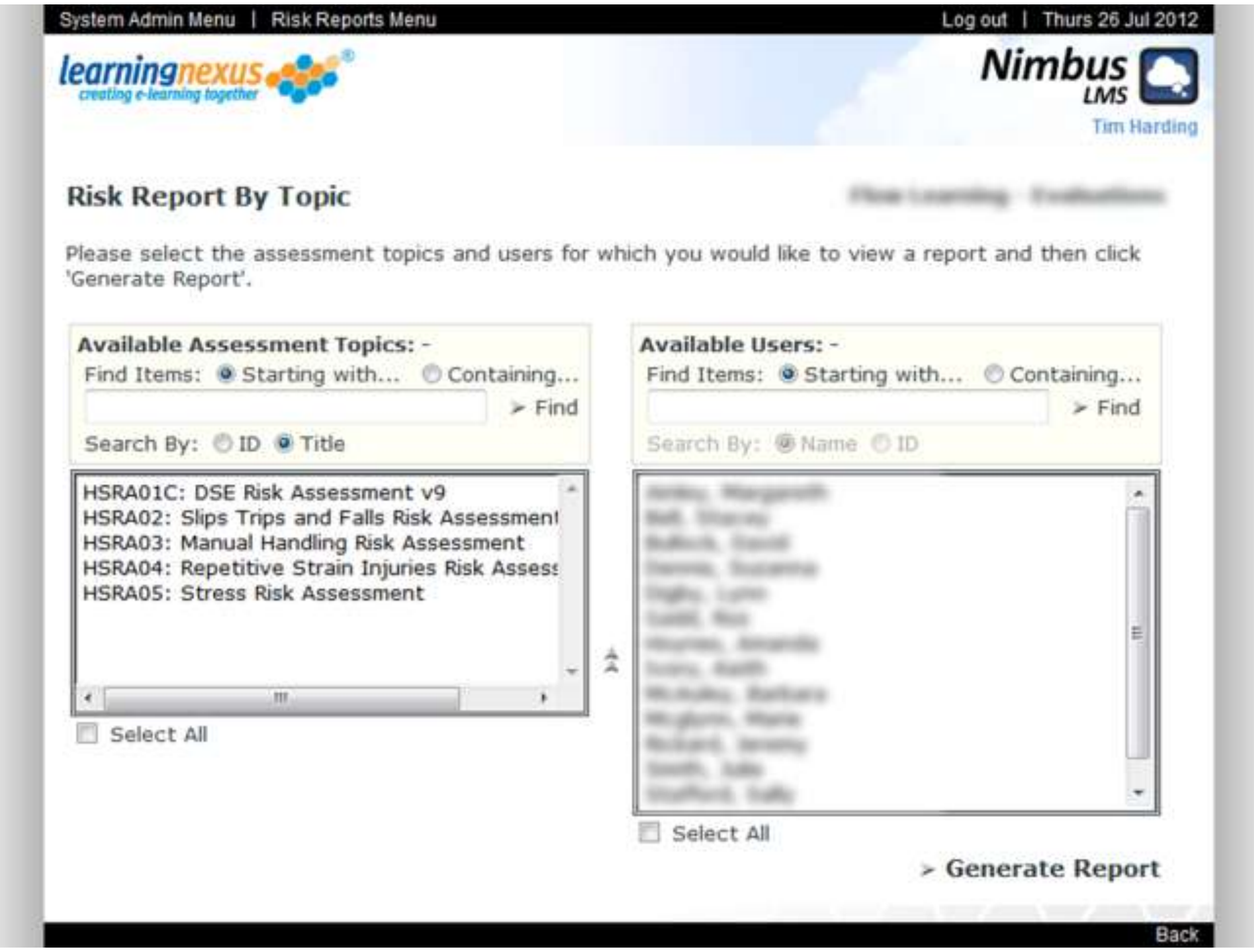


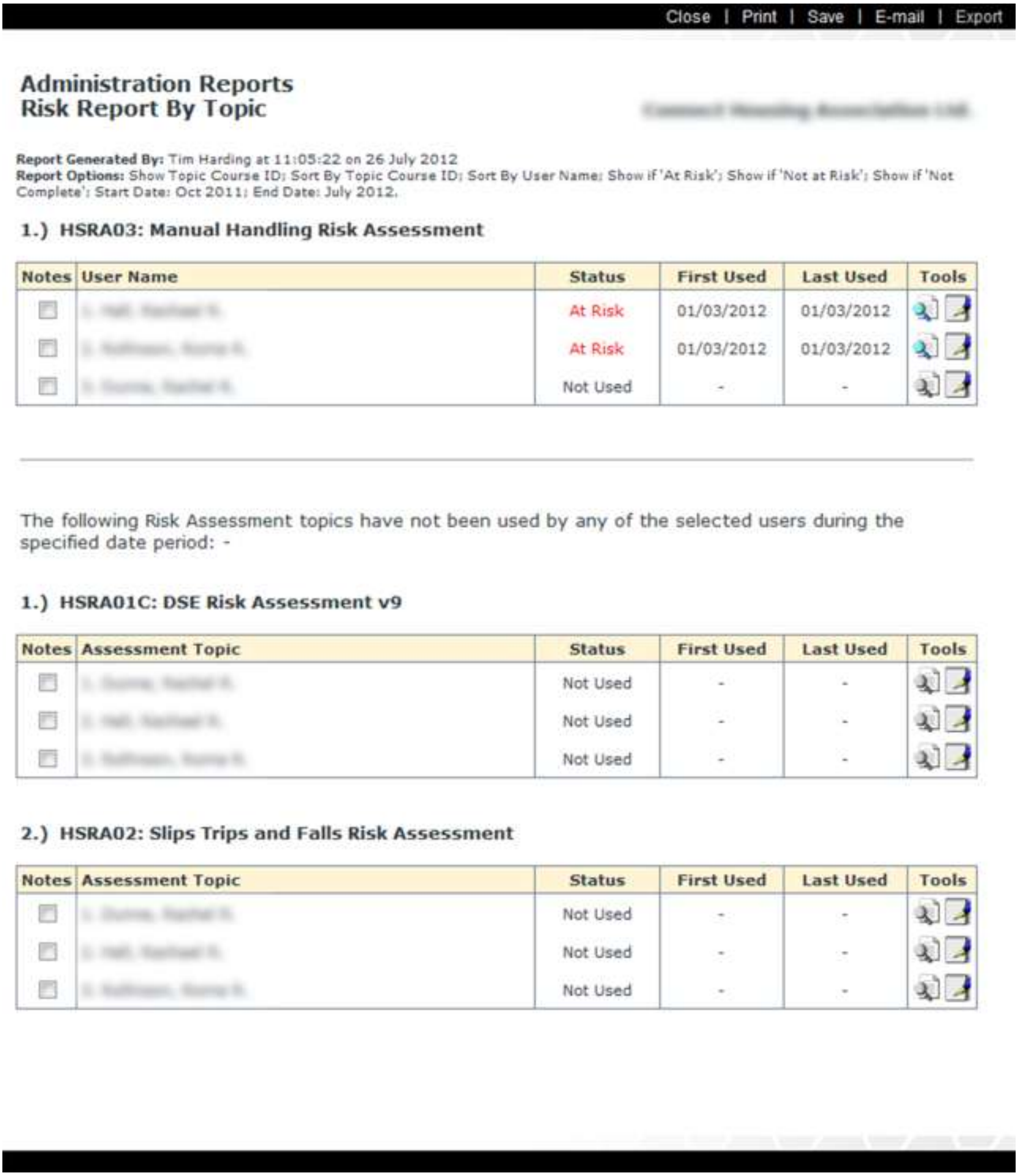
Figure 9-2: Risk Report Options Menu

The risk report options menu consists of two lists; each of which has an option to select all of the entries in the list. The 'Available Assessment Topics' list shows all of the risk assessment topics that are allocated to the site or group(s) for which the desired report is to be generated. The 'Available Users' list shows all of the users who are members of the site or group(s) for which the desired report is to be generated. Both lists are formatted and sorted using the options selected in the previous administration reports menu.

Items in the lists can be located using the 'Find Items' boxes and can be selected by using the usual click, control-click and shift-click keyboard / mouse combinations. If the current user has previously selected a set of assessment topics and users in order to generate a report and they have not since exited the risk reports section then an option to restore the previous selection is also displayed under each list. When the assessment topics and users to be included in the report have been selected, the report is generated by clicking on the 'Generate Report' option.

Risk Report by Topic

Figure 9-3 shows an example of a risk report by topic: -



Close | Print | Save | E-mail | Export

Administration Reports
Risk Report By Topic

Report Generated By: Tim Harding at 11:05:22 on 26 July 2012
Report Options: Show Topic Course ID; Sort By Topic Course ID; Sort By User Name; Show if 'At Risk'; Show if 'Not at Risk'; Show if 'Not Complete'; Start Date: Oct 2011; End Date: July 2012.

1.) HSRA03: Manual Handling Risk Assessment

Notes	User Name	Status	First Used	Last Used	Tools
☐	[illegible]	At Risk	01/03/2012	01/03/2012	
☐	[illegible]	At Risk	01/03/2012	01/03/2012	
☐	[illegible]	Not Used	-	-	

The following Risk Assessment topics have not been used by any of the selected users during the specified date period: -

1.) HSRA01C: DSE Risk Assessment v9

Notes	Assessment Topic	Status	First Used	Last Used	Tools
☐	[illegible]	Not Used	-	-	
☐	[illegible]	Not Used	-	-	
☐	[illegible]	Not Used	-	-	

2.) HSRA02: Slips Trips and Falls Risk Assessment

Notes	Assessment Topic	Status	First Used	Last Used	Tools
☐	[illegible]	Not Used	-	-	
☐	[illegible]	Not Used	-	-	
☐	[illegible]	Not Used	-	-	

Figure 9-3: Sample Risk Report by Topic

If the Include if 'Not Complete' detail option is selected then the risk report by topic is split into two sections. The first section contains the risk assessment topics for which at least one of the selected users has a risk status. The second section contains the risk assessment topics which have not been used by any of the selected users.

The section of the report pertaining to each of the selected risk assessment topics contains a single entry for each of the selected users who have accessed the risk assessment during the reporting period.

The following information is displayed for each of the users: -

- A ‘Notes’ tick box. Ticking this box displays any notes that have been saved against the specific risk record within the selected date period.

- The user’s name.

- The risk status of the user for the risk assessment topic. Possible status values are: -

    - At Risk

      A risk has been identified for at least one of the risk items covered by the risk assessment topic.

    - Not at Risk

      No risks have been identified for the risk assessment topic.

    - Incomplete

      The user has accessed the risk assessment topic but has not yet completed it.

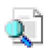
    - Not Used

      The user has not accessed the risk assessment topic within the reporting period.

- The earliest date within the reporting period on which the user accessed the risk assessment topic.

- The latest date within the reporting period on which the user accessed the risk assessment topic.

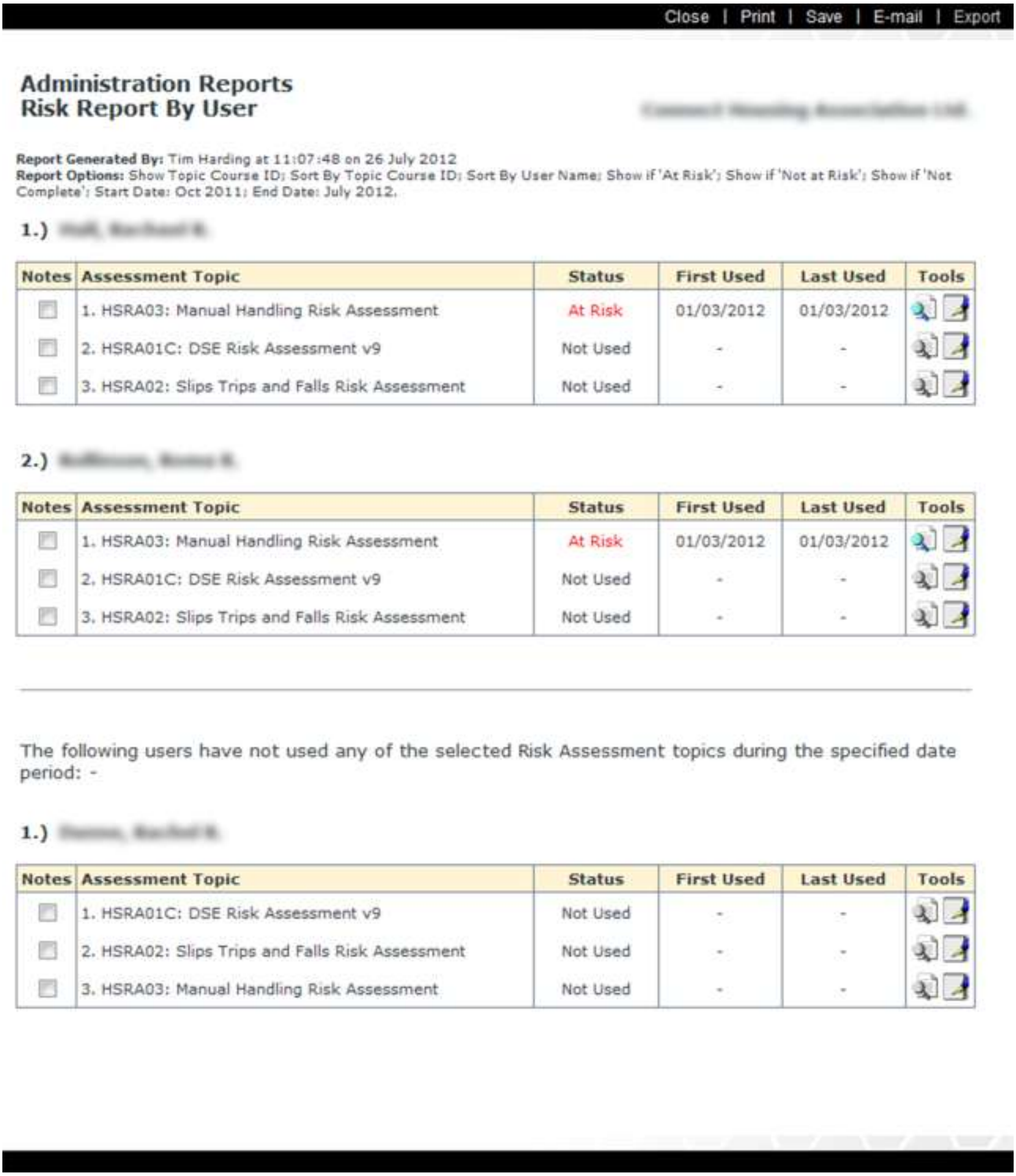
- Two ‘Tools’ icons. These tool icons have the following functions: -

   - This icon displays a report showing the details of the risk status of the user for the risk assessment topic. Please see the Detailed Report section on page 78 of this document for more information on this report.

   - This icon displays a ‘Risk Assessment Notes Report’ which allows the notes stored against the specific risk record to be managed. Please see the Risk Assessment Notes Report section on page 109 of this document for more information on this report.

Risk Report by User

Figure 9-4 shows an example of a risk report by user: -



Close | Print | Save | E-mail | Export

Administration Reports
Risk Report By User

Report Generated By: Tim Harding at 11:07:48 on 26 July 2012
Report Options: Show Topic Course ID; Sort By Topic Course ID; Sort By User Name; Show if 'At Risk'; Show if 'Not at Risk'; Show if 'Not Complete'; Start Date: Oct 2011; End Date: July 2012.

1.) [illegible]

Notes	Assessment Topic	Status	First Used	Last Used	Tools
	1. HSRA03: Manual Handling Risk Assessment	At Risk	01/03/2012	01/03/2012	
	2. HSRA01C: DSE Risk Assessment v9	Not Used	-	-	
	3. HSRA02: Slips Trips and Falls Risk Assessment	Not Used	-	-	

2.) [illegible]

Notes	Assessment Topic	Status	First Used	Last Used	Tools
	1. HSRA03: Manual Handling Risk Assessment	At Risk	01/03/2012	01/03/2012	
	2. HSRA01C: DSE Risk Assessment v9	Not Used	-	-	
	3. HSRA02: Slips Trips and Falls Risk Assessment	Not Used	-	-	

The following users have not used any of the selected Risk Assessment topics during the specified date period: -

1.) [illegible]

Notes	Assessment Topic	Status	First Used	Last Used	Tools
	1. HSRA01C: DSE Risk Assessment v9	Not Used	-	-	
	2. HSRA02: Slips Trips and Falls Risk Assessment	Not Used	-	-	
	3. HSRA03: Manual Handling Risk Assessment	Not Used	-	-	

Figure 9-4: Sample Risk Report by User

If the Include if 'Not Complete' detail option is selected then the risk report by user is split into two sections. The first section contains the users for which at least one of the selected risk assessment topics users has a risk status. The second section contains the users which have not used any of the selected risk assessment topics.

The section of the report pertaining to each of the selected users contains a single entry for each of the selected risk assessment topics which have been accessed by the user during the reporting period.

The following information is displayed for each of the topics: -

- A ‘Notes’ tick box. Ticking this box displays any notes that have been saved against the specific risk record within the selected date period. This box cannot be ticked if there are no such notes currently stored.

- The title of the risk assessment topic.

- The risk status of the risk assessment topic for the user. Possible status values are: -

    - <u>At Risk</u>

      A risk has been identified for at least one of the risk items covered by the risk assessment topic.

    - <u>Not at Risk</u>

      No risks have been identified for the risk assessment topic.

    - <u>Incomplete</u>

      The user has accessed the risk assessment topic but has not yet completed it.

    - <u>Not Used</u>

      The user has not accessed the risk assessment topic within the reporting period.

- The earliest date within the reporting period on which the user accessed the risk assessment topic.

- The latest date within the reporting period on which the user accessed the risk assessment topic.

- Two ‘Tools’ icons. These tool icons have the following functions: -

 - This icon displays a report showing the details of the risk status of the user for the risk assessment topic. Please see the Detailed Report section on page 78 of this document for more information on this report.

 - This icon displays a ‘Risk Assessment Notes Report’ which allows the notes stored against the specific risk record to be managed. Please see the Risk Assessment Notes Report section on page 109 of this document for more information on this report.

Risk Detail Summary

Figure 9-5 shows an example of a risk detail summary report: -

Close | Print | Save | E-mail | Export

Administration Reports
Risk Detail Summary

Report Generated By: Tim Harding at 11:09:21 on 26 July 2012
Report Options: Show Topic Course ID; Sort By Topic Course ID; Show if 'At Risk'; Show if 'Not at Risk'; Show if 'Not Complete'; Start Date: Oct 2011; End Date: July 2012.

1.) HSRA03: Manual Handling Risk Assessment

Risk Assessment	At Risk	Not At Risk	Not Completed
Load Position	1	1	153
Body Movement	2	0	153
Load Movement	0	2	153
Workrate	0	2	153
Load Size	2	0	153
Ease of Handling	2	0	153
Physical Characteristics	1	1	153
Manual Handling	0	2	153
Floor Conditions	2	0	153
Lighting	0	2	153
Clothing	0	2	153
Physical Requirements	0	2	153
Training	1	1	153
Personal Physical Condition	1	1	153
Risk Total:	**12**		

Figure 9-5: Sample Risk Detail Summary Report

The section of the report pertaining to each of the selected risk assessment topics contains a single entry for each of the risk items covered by the risk assessment topic.

The following information is displayed for each of the topics: -

- The title of the specific risk item.
- The number of the selected users for which the risk status specified in the report detail options has been identified during the reporting period.

If the Include if 'At Risk' detail option has been selected then the total number of specific risks identified during the reporting period is also displayed for the risk assessment topic.

Risk Assessment Notes Report

A risk assessment notes report is accessed using the tool icon next to a specific risk record in either a Risk Report by Topic or a Risk Report by User. Figure 9-6 shows an example of a risk assessment notes report: -

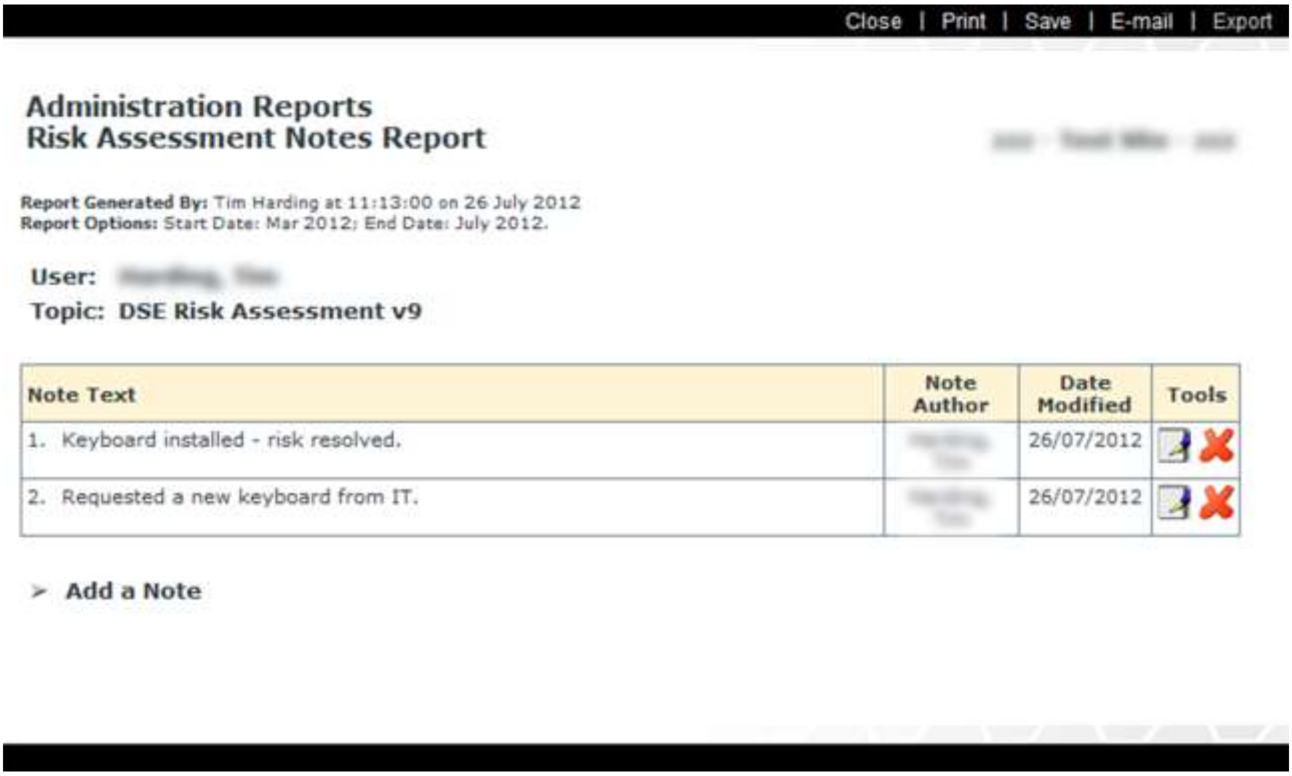


Figure 9-6: Sample Risk Assessment Notes Report

This report shows all of the notes that have been stored for the selected user and risk assessment topic during the selected reporting period and is sorted in descending order by the note date.

The following information is displayed for each of the notes: -

- The text of the note.
- The author of the note.
- The date on which the note was added or last modified.
- Two ‘Tools’ icons. These tool icons have the following functions: -

   - This icon displays the modify note dialog which allows the text of the selected note to be modified.

   - This icon deletes the selected note.

- An ‘Add Note’ menu item which displays the add note dialog enabling a new note to be added.

Figure 9-7 shows the ‘add / modify’ note dialog: -

Figure 9-7: Add / Modify note dialog

The 'add / modify note' dialog consists of an area in which to modify or add the note text and confirm and cancel menu items. The length of the note text is limited to 255 characters (including white space). When the desired note text has been entered, the note is saved by clicking on the 'Confirm' menu item. The 'Note Author' and 'Date Modified' entries for the note will automatically be set to the current user and date.

This page intentionally left blank