During the course ‘Using the Training on Demand LMS’ you learned some basic navigation within the Learning Management System.

Here, we will cover some advanced information available only to you, the System Administrator.

We will start on the Admin Tab and explore the available ‘Manage’ menu options.

We will discuss setting Catalog restrictions and finish up with the Admin Dashboard.

There are three different areas under Settings that we are going to review.

The first area ‘Customer Information’ includes your ‘Company Name’ and the ‘Time Zone’ for your primary location.

The Company Name is the one that Epicor lists your business under in our data base. If you want the name to appear as something other than this you can change it here. .

The ‘Time Zone’ can be changed by clicking on the dropdown and selecting a setting.

The second area contains the settings for email Alerts.

The Format is set to HTML so when a user receives an assignment the link to the assignment is imbedded within the email.

This makes navigating to training assignments easier for the Learner.

Best Practice is to set New Assignments to ‘Immediately’. As soon as an Assignment is made, the User receives a notice.

To the right, check ‘Group Agendas’ so that one email is sent per agenda rather than individual emails for each assignment.

The next three fields are for notices pertaining to the ‘Status’ of assignments.

The default is set to ‘Daily’ but if you want to change the frequency simply click on the dropdown and select how often to send these ‘Status’ updates. You can also Disable these emails.

The final area of this screen is the ‘Test Settings’.

‘Auto Reassign Failed Tests’ can be set to ‘Yes’ or ‘No’ to trigger Failed Tests to be automatically reassigned.

‘Remaining Attempts’ is only available for use when the ‘Auto Reassign’ field is set to ‘Yes’.

This is the number of times a test can be taken by a Learner before you will have to manually reassign it.

‘Show Answers?’ defaults to ‘No’ but if you want your employees to see the answers to their completed tests you can change this to ‘Yes’.

The final field is the ‘Minimum Passing Score’, which will be determined by your business management team.

Before setting this to a high number consider the emotional ramifications. You want the tests to measure learning, not create unnecessary frustration.

Remember to click ‘Submit’ to save any changes you made to this screen.

Creating Accomplishments, Agendas and Groups are covered in detail in other Training on Demand Courses in this Agenda.

Here we will review the Admin ‘Menu’ so that you are familiar with accessing these features.

Click on ‘Manage Accomplishments’.

In the LMS an Accomplishment is any achievement you want to keep track of for a particular employee or group of employees.

Think about certifications your state or insurance might require such as ‘Safety Training’ or ‘Harassment in the Work Place’.

Here you can Add, Edit and Activate Accomplishments.

Now choose ‘Manage Agendas’.

An agenda is a set number of courses, tasks or tests in a specific order designed to guide the learning experience of the employee.

You can ‘Add’ a new Agenda from scratch or copy and existing one.

From ‘Browse’ you can ‘Unassign’ an Agenda improperly connected to a User or Group.

You can also ‘Republish’ or Activate an Agenda making it visible for assignment.

‘Manage Groups’ is the next menu item.

A ‘Group’ in the LMS contains any number of Users who have similar roles within your business.

Here you can ‘Add a New Group’, ‘Assign Employees to Groups’ or ‘Edit’ Users and other information related to a Group.

Within the ‘Manage Groups’ area you are also able to create ‘Catalog Restrictions’.

A ‘Catalog Restriction’ keeps an employee from having the ability to view certain videos or ‘Courses’ within the LMS.

The System Administrator is the only user who has the ability to create ‘catalog restrictions’.

On the top left hand column of the screen is a dropdown listing ‘All Categories’, ‘All Subcategories’, and ‘All Courses’.

You can restrict items in the catalog by any of these three levels.

For example, select a category you do not want certain employees in your business to view.

We will choose 'Security' for our example.

Once a Category is selected then all Subcategories under that category will be available.

If you want to restrict one course highlight it and click 'Add'. The Course is moved to the 'Restricted Catalog' section.

If you want to restrict an entire Category select only the Category and click 'Add'.

All courses under that Category will be added to the restricted list.

If you selected a Course or Category in error you can highlight it and click 'Remove'. It no longer appears in the 'Restricted Catalog' list.

Once you have the restrictions selected select the Group or Groups that will be unable to view this material.

Remember you can use your Ctrl key to select multiple groups.

Once you have selected the appropriate group or groups click 'Submit' at the bottom of the screen.

You can have as many 'Catalog Restrictions' as you feel your business requires.

It is important to note that if an individual resides in multiple Groups and one Group is restricted but another group is not then the individual is not restricted from viewing the courses in question.

The next menu item on the Admin Tab is Manage Tasks.

Tasks are any assignment you want to make to an individual that isn't a course or test listed in the Learning Management System.

These could be as simple as 'Reviewing the Employee Manual' or something like watching a 'Harassment' course on the internet.

Here you can Add, Edit and Activate Tasks.

The next two menu items go together.

Administrators can create 'Questions'   and add them to a 'Test' to validate what your employee is learning.

For example, you might want to create a Test to go along with the task to Review the Employee Manual.

A Test would let you measure employee retention and possibly alert you to anyone not reading the material.

The Message Center gives you a vehicle to communicate with your employees when they are onsite, in a different store or at home.

As the System Administrator you can also decide who gets to view a Message and who does not.

Shortcuts give you a central depository of all useful websites your employees might need to visit in order to serve a customer or view additional training material.

If you restrict access to the internet except for certain sites this would give you a place to list those sites as well as maintain the accessibility.

The last item in the menu is 'User Maintenance'.

The multiple functions listed under this menu item are covered in course titled 'Training on Demand Users and Groups'.

The final item from this menu we will discuss is the Admin Dashboard.

When you first start using the Training on Demand LMS there will not be much data available.

However, as you and your employees use the site this link will become more useful.

This Dashboard view gives you a quick snapshot of where your employees rank within your company.

In the bottom right hand corner, you can also view how your employees are doing in comparison to all other LMS users.

On the left hand side of this screen you can view the 'Percent of Assignments Complete' and scroll through by User.

Below that get a graph representation of the status of Accomplishments, Courses, Tasks and Tests.

This output can also be exported as a CSV file.

As the System Administrator you have more flexibility and control to add, edit or delete items within the Learning Management System.

You can utilize Groups to create restrictions to certain materials while providing a clear path to the items your Learners need to view.

Use caution with this responsibility and take the time to become familiar with navigating your Training on Demand site.