Epicor Learning Center Navigation for Administrators

During the course, Introduction to the Epicor Learning Center, you learned some basic navigation within the Learning Management System.

Here, we 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 database. If you want the name to appear as something other than this, you can change it here.

You can change the Time Zone by clicking on the dropdown and selecting a setting.

The second area contains the settings for email Alerts.

You have two options for email format: HTML and text. When you select the HTML option, the Learning Center embeds a link to the assigned task in the email body.

This makes navigating to training assignments easier for the Learner.

Best Practice is to set New Assignments to Immediately. As soon as you make an Assignment, the Learning Center sends the user a notice.

To the right, enable Group Agendas so that the Learning Center sends one email 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.

You can set Auto Reassign Failed Tests to Yes or No so that the Learning Center automatically reassigns Failed Tests.

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

This is the number of times that a Learner can retake a test before you have to reassign it manually.

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. Your business management team determines this value.

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

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

Let's review Manage Accomplishments.

An Accomplishment is any achievement you want to track 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.

Next, we'll look at Manage Agendas.

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

You can Add a new Agenda from scratch or copy an existing one.

From Browse, you can Un-assign an Agenda improperly connected to a User or Group.

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

In Manage Groups, a Group in the Learning Center 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 may also create Catalog Restrictions.

A Catalog Restriction keeps an employee from having the ability to view certain videos or Courses within the Learning Center.   What will be taught in this section?

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

On the left side of the Maintain Catalog Restrictions panel are dropdowns listing Categories, Subcategories, and 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 you select a Category, then the Learning Center makes all Subcategories under that category available.

If you want to restrict one course, highlight it and click Add. This moves the Course to the Restricted Catalog section.

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

The Learning Center adds all courses under that Category 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 that 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 where 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 Epicor Learning Center.

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 repository 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.

We cover the multiple functions listed under this menu item in the Training on Demand Users and Groups course in this agenda. The final item from this menu that we will discuss is the Admin Dashboard.

When you first start using the Epicor Learning Center, there will not be much data available.

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

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

Various graphs show you Course Assignments by User and by Group, Average Test Score by Category, and Past Due Assignments by Group.

At the bottom of the window, a table shows a list of users along with various test and course information. As the System Administrator, you have more flexibility and control to add, edit, or delete items within the Epicor Learning Center.

You can use 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.

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