Customizing Your Epicor Learning Center Home Page

The Epicor Learning Center contains a flexible, easy to use Message Center that allows you to electronically post information right on your Home Page.

It also permits you to provide web Shortcuts to important internet links and has a Library function for you to store documents vital to your business.

In this lesson, you'll learn how to customize your Home Page resources and how to edit and manage information in each of these key areas.

The Message Center is prominently located on the Learning Center Home page.

Here you can post messages to your employees on any subject you deem necessary.

No more paper notes hidden on the board in the breakroom.

The message might be about a Store Policy change, an upcoming promotion, or even a company party. It could also contain information relevant to Training on Demand attendees.

Now your memo is where everyone can see it, even if they are not in the store working.

To create a message, go to the Message Center option under the Admin Tab.

Click Add, and enter the Title of your message.

This is what displays in the Message Center, so make sure it accurately describes the message.

The Site Message box contains the details of the message you are posting. Type your text in this area.

A message might be time-sensitive, so select a Release Date and an Expiration Date.

The default dates are equal to today's date.

The message will only display during this time.

Choose a Functional Area.

These tie back to User setup.

You can select one or more Functional Area by holding the Ctrl key and clicking on the Functional Areas that you want to receive the message.

If you need to direct employees to a website, simply type the web address in the URL field.

For accuracy, you can also go to the web site in question, copy the website address, and paste it in the URL field.

When you finish entering the message, click Submit.

The system displays an acknowledgement that you added a message.

If you want to edit a message, go to Message Center on the Admin Tab, and then click Browse.

Locate the message, and press Edit.

Alter any part of the message except the original Release Date.

Extend the Expiration Date to reuse the message as is.

Click Submit.

A system message confirms your action.

Your updated message now appears on the Learning Center Home Page.

To delete a message, return to Browse, and locate it.

Click Delete.

The system displays a verification window. Press Yes to confirm and permanently delete the message.

You are not limited to the number of messages you can have in the Message Center, so deleting them is not required, however, it will make your message list easier to search.

The next area of the Home page that you can customize is the Shortcuts section.

This offers a convenient place to keep website links.

Here we show some website links already provided as shortcuts.

Let’s explore adding your own website links.

From the Admin tab, click the Shortcuts option.

From here, you’ll add, edit, or delete web links in your Shortcuts list.

To add a new link, scroll to the bottom of the page and click Add New Shortcut.

Type the name for the link, and then enter the Link URL.

A Best Practice is to open the website itself and then copy the link from the address bar.

Now click Save.

The Link appears in the Shortcuts area.

Notice that you can make a link Inactive by enabling the check box below the link.

If you have a link that is only active during a specific time of the year, you can hide it from the published list.

To see inactive links, click View All Shortcuts.

If you need to delete a link, enable the Delete check box below the Link URL field and click Save.

The Learning Center Library is the final area of the Home page that you can customize. It offers a centralized place to keep documents for easy access by any employee.

You can have library documents on a PC, an internal network, or an external media source such as a flash drive or CD.

You can add many different document types to the Library, including Word, Excel, JPEGs, and PDFs. However, individual file sizes must not exceed 1MB.

In addition, you can have an unlimited number of URLs.

Documents that you might want to add to the library include your Employee Manual, Health Insurance handbook, vendor price sheets, or handy How-to documents.

Do you have job aids to help complete seldom done tasks? The Library is the best place to store them! This way, everyone can find them when they need them.

You can update or delete the documents right from the Learning Center. This eliminates the problem of outdated versions or the need to replace information in multiple binders.

Let’s start by adding a document from the computer.

From the Learning Center Home screen, click the Library link on the menu bar.

In the Library navigation panel, select Add.

Under What would you like to do, enable Upload File.

We’ll upload a New Employee Checklist.

In the Name field, enter what you want to display in the Library on the Home page for the document.

This does not have to be the same as the filename.

To find the file to upload, click the Choose File button and navigate to the folder on your computer that holds the copy of your New Employee Checklist.

Highlight the document and click Open.

Notice that the system copies the document details to the Upload File field.

Click Submit and the system copies the file to the Learning Center Library.

Once the file uploads, the system opens the Browse Library Resources window and notifies you that the upload was successful.

The bottom section of this window shows a list of all of the documents uploaded to the Library.

You can Edit and Delete documents, or Edit the Permissions of who can access them from this window.

To add a resource that is a link on the internet, select Add Link here.

Type a Name for this resource and enter the link in the URL field.

Click Submit.

The system displays a confirmation message of your addition.

Once you complete your library, you can manage the resources by selecting Browse from the Library menu.

This gives you the option to Edit, change Permissions, or Delete resources.

The Edit option allows you to update the resource title or associated link.

Simply click Edit, update the information, and click Submit.

The Edit Permissions function allows you to restrict Groups of employees from viewing a library resource.

To use this feature, locate the desired resource, and then click Edit Permissions.

Highlight the Group or Groups you would like to restrict, and click Add.

They now appear in the Restricted Groups list.

Press Submit.

Only members of the Groups that remain in the Resource Groups panel will be able to view the selected resource.

To Delete material from the Library, click the Delete link next to the resource.

The system prompts you to confirm the deletion.

Click Yes to confirm.

System Administrators are the only users with the ability to manage Library content.

All other users only have the ability to view information.

To view Library resources, click the View Resources link under the Library tab, or select the resource that you want to view from the Library panel on the Learning Center Home page.

If the resource that you want to view isn't visible in this panel, click the View all Resources link to see the complete list.

The ability to customize the Learning Center with your own employee materials and personalized links gives you a huge advantage in training.

Not only do your employees have access to the latest online training, you can also offer your own materials and resources in the same location.

Add to that the ability to manage resource distribution by Group and having a central depository for updated materials, and you have a highly effective resource that you can put your own customized stamp on.

About Epicor

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