Managing Roles and Agendas

Everyone in your business has a job to do, right? They might run a specific machine or manage a certain department.

Or maybe, sometimes they do several things like also run a sales counter or process accounts receivable payments.

All of those functions make up their role or roles. Epicor Learning Center also has roles and related agendas so that you can assign the right training to the right people and they can consume it in the right order.

Select an option on the right to get started and we'll take a look at how to best align content to your users.

Manage Roles

Your ELC site comes with many predefined roles. You can view these from the Admin menu under Manage Roles, Browse.

You can search for a role by keyword, an active or inactive status or the parent role.

Parent roles are created by Epicor University and represent our recommended training paths.

The results can be sorted by the role name, the parent role or the role status. The number of employees associated with each role is also shown.

To add a new role, expand the Admin menu, choose Manage Roles and then Add.

You can choose to create a brand-new role from scratch or create one based on a parent role.

This option creates a copy of the existing parent but allows you to customize it as much as you want.

Whether you use Epicor's roles or create a new one, they will always retain that connection to the parent so that you are alerted when Epicor University makes any changes to it.

If you go this route you will need to give your role a good name, a thorough description and then decide which parent role you want to copy. We are adding a Shift Manager role and that person will need to learn what an Inventory Clerk does.

You will then need to identify the members associated with this role. You can choose as many as needed and then click Next.

On the Edit Content tab, you see the Agendas currently associated with the Inventory Clerk parent role.

On the right are the Agendas that Epicor recommends for this role.

On the left, are some additional agendas that are not required but optional for you to add to your new role.

You can change the order of My Role Agendas by dragging and dropping.

Use the arrow to 'associate' any of the options agendas with your role. The larger arrow, here, will associate all of these with your role.

You can also click the eye icon to view the courses, tests or tasks that make up the agenda.

Click the X to remove any Agendas from your new role.

All other Available Agendas are listed below, choose any and use the arrow to add them to your role.

Click Assign to Assign these Agendas to the Members you added to your new Role.

Notice the Days to Complete field. Those are calculated based on your system settings. You can adjust them if needed, make any needed additions and then press Submit.

Press Save to keep your changes.

You can use Revert to Epicor Parent Role to remove your changes and set all of the content back to the parent role.

When you create a new role from scratch, you will be able to select any of the current Agendas. You will have the same options for editing and as well as Assigning and Saving.

You can find both of these new roles under Admin, Manage Roles, Browse.

You can see that one is based on a parent and the one we made from scratch is not.

You can click the edit icon to make changes to the role itself, members, or content.

You can also deactivate a role as long as there are no members associated with it.

Manage Agendas

Agendas are the best way to get the right learners to take the most targeted content in the correct order. You can create new ones from the Admin menu under Manage Agendas, Add.

You can build one from scratch, copy an existing one and modify it or create on based on a role.

If you want to start from the beginning, create one from scratch and then give it a unique name and a good description.

From the Type dropdown determine if the user will watch a course, take a test or perform a task.

Select the assignment and then keep adding agenda items.

Use the arrow icon to drag and drop them into the best order.

Check the delete box if you decide to remove one.

Click Submit and then carefully review your options. If you want to continue making changes on this, just Save it.

If it is ready to go and can be assigned to learners, you will need to publish it. We will just save ours for now.

View your saved Agenda from the Browse menu and change the filter to Unpublished. You can Delete your unpublished Agenda by clicking the can icon. Choose Yes to confirm the deletion.

We will open the Name link to make changes and Submit the Agenda again.

When you are ready to Publish your agenda note that it will no longer be editable.

You will also want to Share it so your learners can see it when they Browse and other System Administrators can assign it.

Agendas can be unshared if you no longer want your users to be able to assign it to themselves.

Published agendas can be also retired if they are no longer valid and you don’t want your learners to view them.

Retiring the agenda removes the ability for it to be assigned to learners.

Choose Yes to confirm. This changes the status in the browse window to Retired.

You now have the option to also unassign any users that are currently working on it. Any completed content will still appear on the learner's transcript.

Retired and Unshared agendas can still be Republished and set to Share again.

Electing to Implement New Content

Your Epicor Learning Center site is yours and you can customize it any way you like.

When changes are made at Epicor University, they don't' automatically update your local agendas or roles.

After all, you have it set a certain way and we would not want to change that.

But we are continually adding new content and if you use our roles or base yours on our parent roles, we will send you a notification. Then you can decide if those changes work for you.

You will receive notification if an agenda is added to Role or if one is removed from a role. Also, if we retire an agenda or deactivate one of our public parent roles.

The notification will appear here, your alerts. Open the alert and read the details. This one says that changes were made to a parent role, listed right here, and one of the associated agendas were removed.

To accept the change, locate the role in the Browse page and choose the pencil icon to edit.

Open the Edit Content tab and notice this item in orange. This is the agenda mentioned in the notice. You can opt to leave it as is or click the X to delete it. Remember to save your changes.

When the notification involves new items being added, it will appear here on the left in the Edit Content tab.

Just like when you edit a role, you can associate it with your role or opt not to.

Make any adjustments here and then click Save.

Press Assign to Assign the new content to your users. Don't worry, ELC uses that smart assign logic to only add new content to your users. If they already completed this, they will not get a new assignment.

About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, connect with Epicor or visit www.epicor.com.

Corporate Office
804 Las Cimas Parkway
Austin, TX 78746
USA
Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean
Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico
Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa
No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom
Phone: +44.1344.468468
Fax: +44.1344.468010

Asia
238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684
Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand
Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia
Phone: +61.2.9927.6200
Fax: +61.2.9927.6298