Epicor Learning Center Administrative Tools

As a System Administrator, there are several tools you'll want to be familiar with to make managing your Epicor Learning Center system easier.

We'll discuss company settings, notifications, your dashboard, the company library, and shortcuts.

Ready to get started? Let's go!

Company Settings

Company Settings drive the default behavior of your Epicor Learning Center site.

Click Admin, then Settings.

The Customer Information tab allows you to set Company Name and Time Zone.

Company Name determines the name displayed on the Home Page when users log into Epicor Learning Center.

You can also set the default time zone for your company here.

Note that If you have users in other locations, they can manually adjust the time zone for themselves on their own profile.

Make any needed changes here, then click save.

Alert Settings gives you options to determine if emails are sent in HTML or text formats, the frequency of alert emails for new assignments, completion notifications, assignment reminders, and when assignments are past due.

These can all be configured to be sent immediately, on a daily or weekly basis, or disabled.

Enable the Group Agendas checkbox to send a singular summary email for each agenda assignment or leave unchecked to notify learners of each individual course, test, or task assignment when an agenda has been assigned.

For the best experience, we highly recommend sending emails as HTML, setting new assignments to immediate and grouping agendas.

Now, let's look at Content Settings.

This page allows you to customize the overall experience and Epicor Learning Center defaults for your site.

You can choose to automatically reassign failed tests, reveal answers to tests while assignees are taking them, configure the default number of attempts for tests, minimum passing score for tests, and the default time to complete an agenda, which is 60 days by default.

Note that these are recommended defaults and most of these setting can be overridden on individual assignments.

Also, to help you manage these notifications, we do recommend creating a rule in your email service to filter any emails from automailer@epicor.com to a folder inside of your inbox to make it easier to sort through these notifications.

Once you've finished making changes, click Save.

Finally, let's look at Registration settings.

Here you can specify who will review registration requests for fee-based classes.

This checkbox controls whether the specified administrator will be sent emails when a user requests to take a fee-based class.

The email will contain a link where they can review this request and cancel the registration if they choose.

Click Save when you've finished making changes.

Notifications

The Notifications system allows you to create and manage custom communications your users will see in their Message Center.

Note that automatic notifications will appear when Epicor adds content and updates Epicor-defined roles.

Click Admin, then Notifications.

Let's create one. Click Add.

From here, everything else is pretty straight forward. I'll create an announcement that a new agenda is available.

I'll enter a brief title and a message about our new training.

If there's a resource that can be helpful in providing extra context to your notification, you can include it in the URL field. I'll add one here.

You can also include an attachment that users can download and view if you'd like by clicking Attach File. You'll need to keep the file on the smaller side—attachments must be under 2 megabytes.

Next, choose the audience that this notification applies to, using the Role dropdown. You can select individual roles, select all, or deselect all if needed. When you're ready, click Submit.

You'll see a brief confirmation that your Notification was created successfully.

If you need to make changes to this notification or any others, it's simple! Under Notifications, click Browse.

Here, you'll see all notifications created by your account and the roles to which they've been delivered.

You can delete it by clicking the trash can or edit it by clicking the pencil.

Fix any issues you need to fix here--I'm going to change this, so it only applies to one role--and click Submit to save your changes.

Admin Dashboard

There is a ton of valuable data retained in your learning center. The dashboard allows you to manage all that data.

Click Admin, then Admin Dashboard.

Here you can find statistics in bargraph form showing you a number of analytic details about the state of your learners versus their assignment completion status, test scores, and more.

At the top of the page, you'll see a bar that displays your total number of users, total number of assignments which includes courses, tests, and agendas, past due assignments, number of course assignments, number of test assignments, and your top student.

Let's scroll down a bit.

Below, here are charts you can navigate through.

The first two show course assignments by user and course assignments by role.

These display the highest numbers first, but you can advance or move back by pressing Next or Previous.

Below these charts are your statistics for Average Test score by Category and Past Due Assignments by role which sort data by blue and teal respective of their data.

Spikes can be a good indicator that you may want to see if the content is still relevant or send an email to a group that they may want to brush up on a particular subject.

Finally, the bottom panel gives you some feedback on completion and test status.

You can see who among your team has scored highest, who's testing the most, who has started the most courses, who has completed the most courses, and who is typically collecting the trophy for most assignments overdue.

Company Library

Need to attach some of your own material or link to something external to help your learners get the full picture?

Check out the company library.

Click Company Library, then Add.

Here you can include links or upload files that your team can reference.

To add a link, give it a descriptive name and paste the URL.

If you'd rather upload a file, click Upload File.

Give your attachment a descriptive name, then click Choose File to upload it. Click Submit when you've finished.

You'll be returned to the Company Library and will see a confirmation that your resource has been added.

You can now review your library. Note that you –and your learners – can always return here by clicking Browse under Company Library.

You can also leverage this resource by creating a Task that refers to a Company Library resource so you can make anything you want part of your training program!

You can edit or delete library resources using the pencil or trash can icons.

If you need to restrict certain library resources from particular classes of users, click the icon of the folder with the lock on it to manage which roles can access the item in question.

Let's restrict access to this item from everyone but our accounts payable clerks.

Select any roles you want to restrict. You can click, control-click, or click and drag.

Click Add to add roles to the list of restricted roles. Roles which are restricted from viewing this resource are shown on the right, and unrestricted ones are shown on the left.

Click Submit to save your changes.

Epicor Learning Center will confirm your saved changes and your resource will now have the settings you need.

Shortcuts

If you want to add some quick links to the home page, use our Shortcuts tool!

Click Admin, then Shortcuts.

Click Add New Shortcut.

Enter a name for the shortcut, then enter a link.

If you need to add more shortcuts, click Add New Shortcut, then set the Link Name and URL.

When you've finished, click Submit.

Let's check our handiwork.

I'm going to return to the homepage.

Any shortcuts you add will show up on the right side, and when users click them, their browser will open the link in a new tab.

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.

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