Fabric LMS System Reference Guide

Administering Fabric

REFERENCE GUIDE

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Forward – How to Use this Reference Guide

This reference document contains intra-document links, and is meant to be viewed as an interactive PDF or WORD file. If you prefer to print this guide, it has been designed to be printed double-sided.

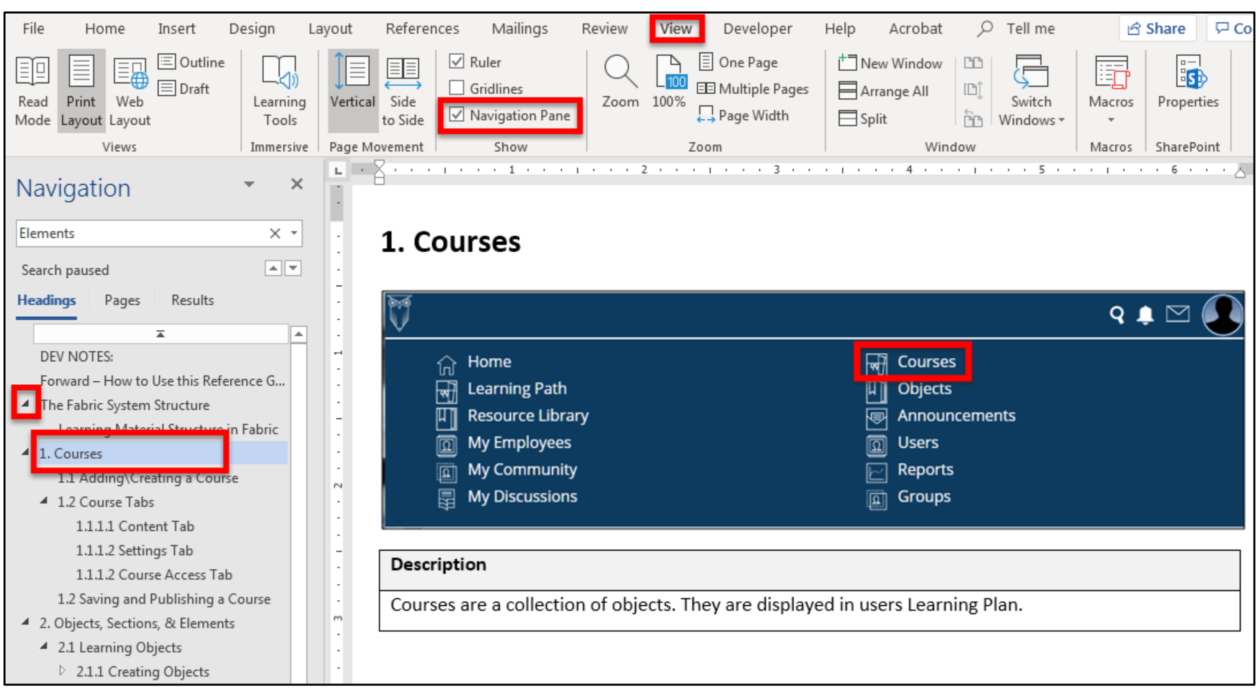
Searching

To search for, find, and review specific functions in Microsoft Word or PDF viewer, consider the following:

1. **Use the Table Contents**
   The TOC headings link directly to that topic. Click on a TOC heading to go directly to that point in the document.

2. **Search for the Desired Function**
   Press CNTRL-F and enter the function you wish to search for. Keep pressing enter and the search will skip between all words you searched for, or click the suggested headings to skip that part of the document.

3. **Navigate via Navigation Pane**
   Click View on the main menu, select Navigation Pane in the Show ribbon, and search the Headings to find the topic of interested. You can click on the main headings arrow to view the sub-headings, and clicking on a heading will take you to that part of the document.



What Does Fabric Do?

Employees work all day and go home at night. Your LMS keeps working non-stop. It's delivering your interactive training content. It's recording every successful and unsuccessful quiz attempt down to the individual answers. It's making sure learners are caught up with the latest information. Your LMS does the work of a whole team of instructors, clerks, and admins all the time.

On-Boarding New Learners

Training at most companies start with a new employee gets hired. On-boarding new employees quickly and effectively is the biggest win you can achieve as T&D professional. New employees are a special bunch. They bring in all sorts of skills and abilities to your company but they can also be a drag on the rest of your team at first. Your LMS is the tool for taking unfamiliar, un-knowledgeable recruits and turning them into an effective part of your organization. An LMS does this by:

- Delivering and instilling core knowledge of the company as fast as possible.
- Constructively assessing new employees and highlighting strengths and areas of improvement.
- Giving new employees a long term plan at your company.
- Providing a platform where new employees can ask questions and share knowledge.
- Socially connecting new employees with peers and mentors.

Keeping Learner Records

Training records are vital data in any company because they:

- Show you the strengths and weaknesses of collective knowledge in your company
- Help you plan individual growth for each of your employees effectively
- Track training requirements and show compliance

These are not optional, "nice to have" functions; they are legal requirements and necessary pieces of an effective business organization.

Your LMS delivers the tools to collect data, store data, and retrieves it in an instant. This gives you a scale-able way to achieve the above with minimal effort.

Delivering Effective learning Experiences

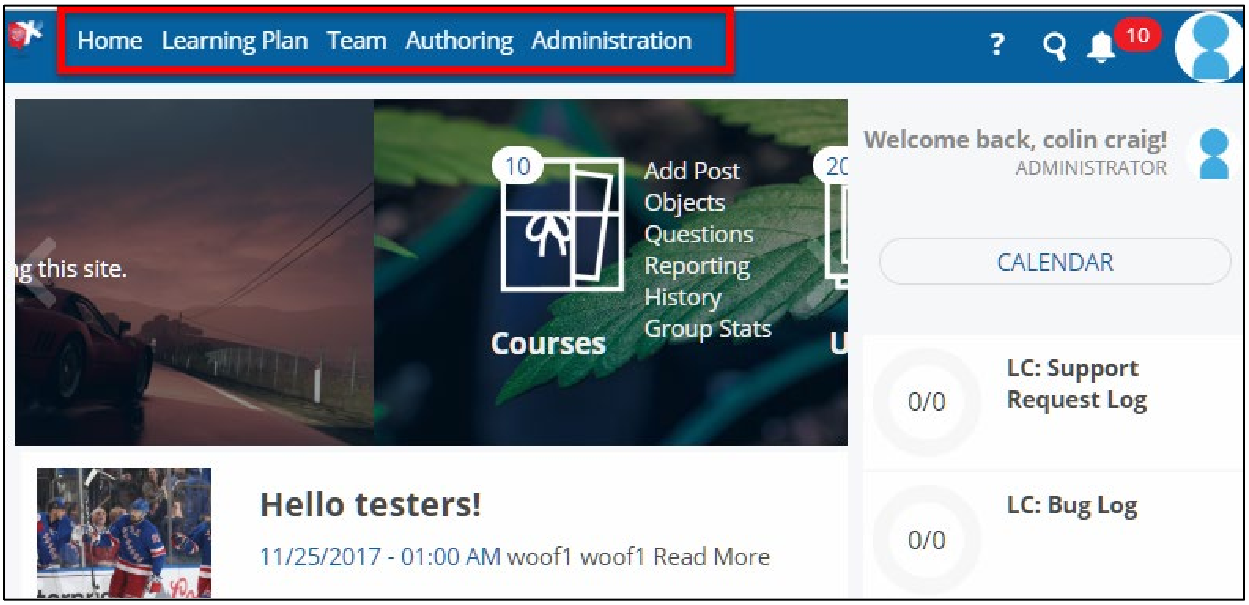
Effective training means using the right tools and mediums for the job. Online multimedia training can be just as effective as in-person training if it is used correctly. Your LMS gives you the ability to roll out your training to an unlimited number of users according to their needs and schedules.

1. Fabric Home Page Key Functions

Description
Fabric has a varied set of functions that help you manage content and communicate to users. Many of these key functions are access via your Fabric Home Page. Your Fabric homepage is where users can view notification announcements, access their Learning Plans, and click on quick links that take them other areas of Fabric, or other sites that Fabric is connected to.

1.1 Homepage Navigation Menu Items

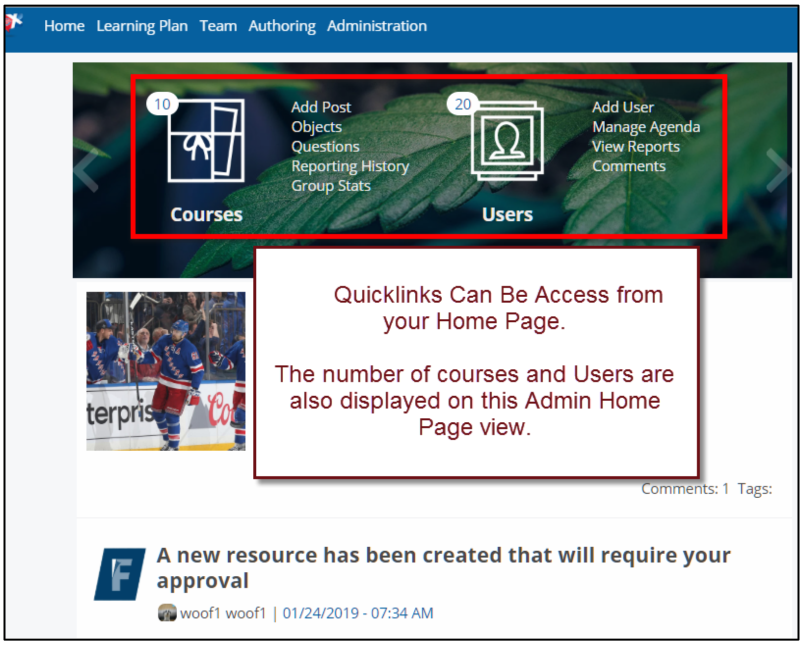
Description
Fabric users can only view what their access level determines that have access to. See User Access Levels for more information on what different functions are accessible by which access levels.



Menu Item	Behaviour
Home	Click on Home to return to the main home page.
Learning Plan	Displays for all users. Users click here to view learning that has been assigned to them, or to manually select courses from a catalogue.
Team	Displays for managers of teams. Team management, performance, and individual reports can be viewed here. Manager access employees work out of this area.
Authoring	Users with author level access click here to develop courses and objects. This is where content drafts are stored prior to release into Learning Plans.
Administration	Administrators access user and user group functions, and reporting from this menu.

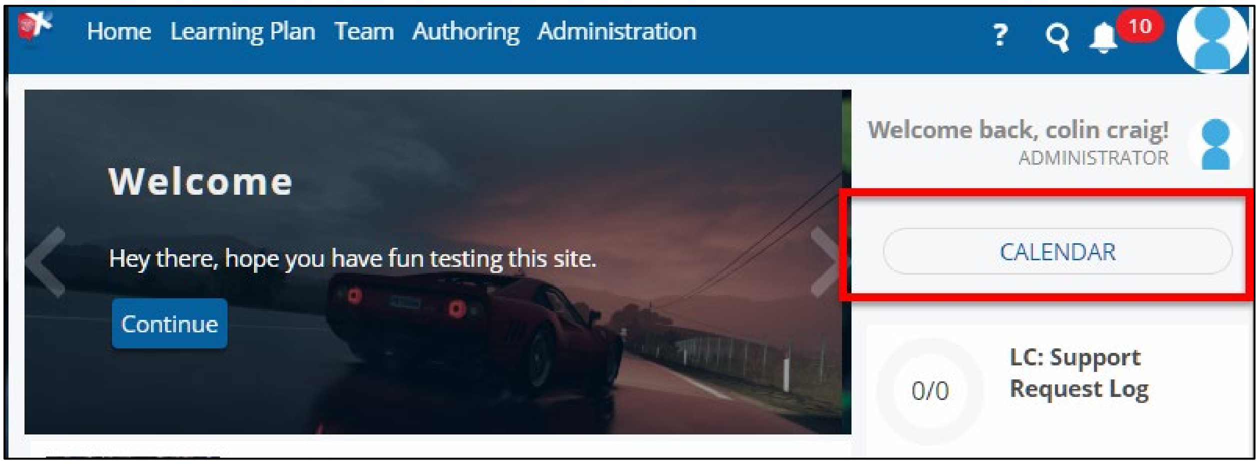
1.2 Home Page Quicklinks

Description
Depending on how your Fabric site is configured, you may have Quicklinks on your homepage enabled. Quicklinks are links that users can click on that take them to different parts of Fabric, or to other integrated 3rd party systems.



1.3 Calendar

Description
Displays weekly or monthly view, and displays all upcoming events. These include Goals, Due Dates, and events.

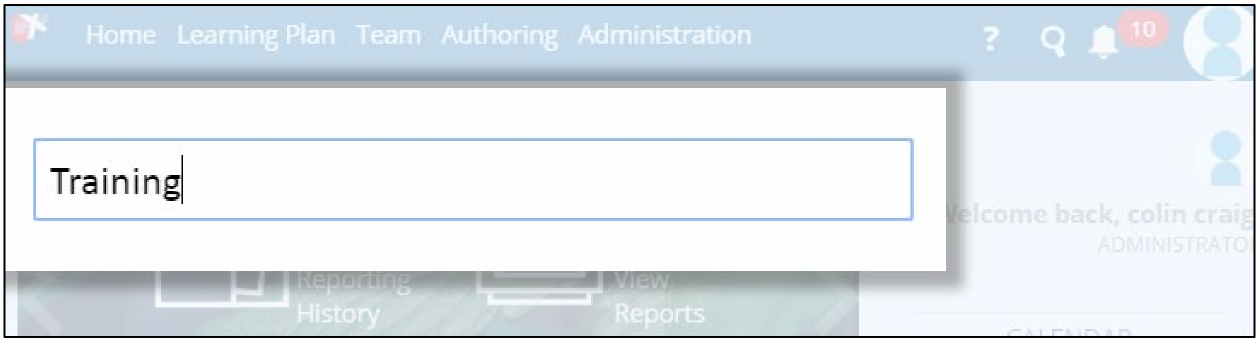


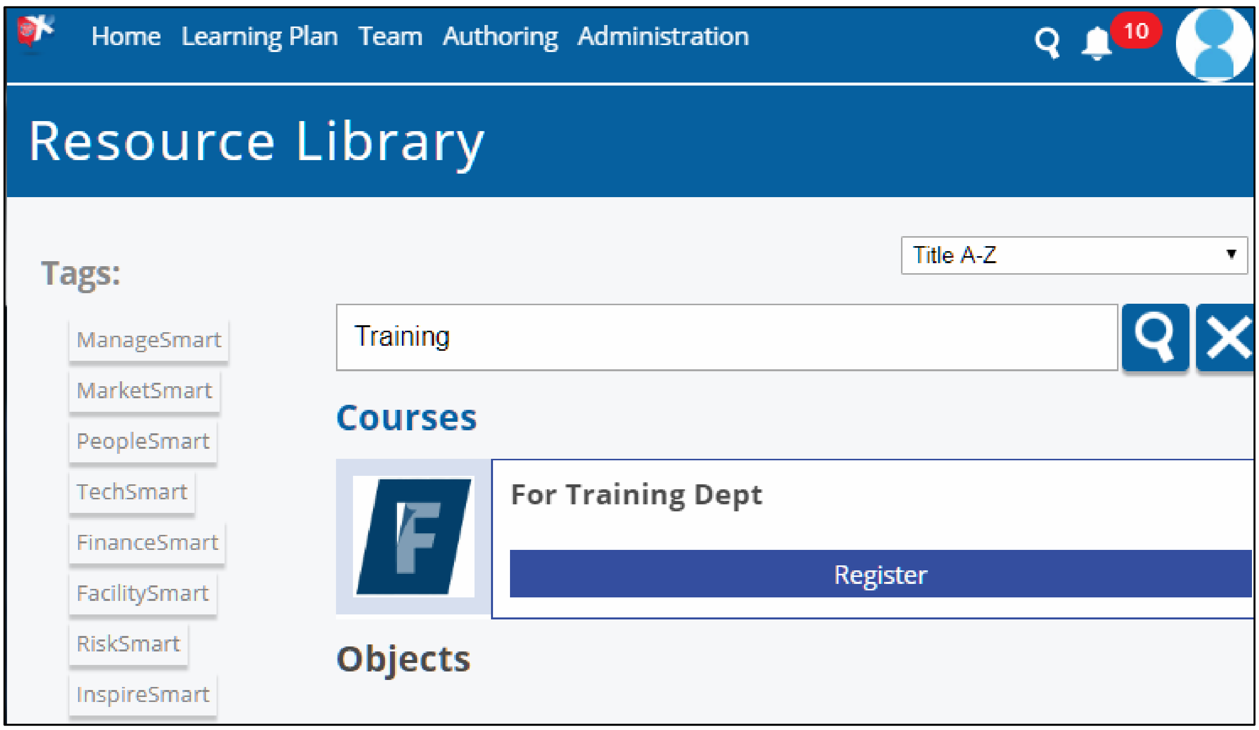
FROM HOME PAGE, or PLAN PAGE, manager will have an agenda button that displays calendar.

Calendar Item	Behaviour
Due Dates	Due dates can be assigned to users when completing coursework.
Events	Events can be created and assigned to users, and will display in their calendar (events are not tied to courses).
Expiration Notice	Any object that expires will be displayed on the calendar.
Classes	Any scheduled classes will display in the calendar, similar to events. However, classes are linked to courses.

1.4 Search Button

Description
The Search button searches courses and objects, and displays the search results in the Resource Library.



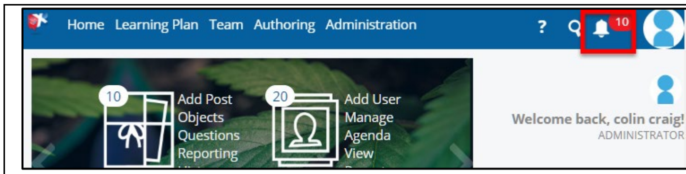


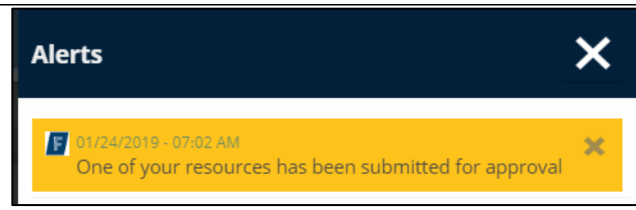
1.5 Help Button

Description
The Help button exists on every page of Fabric. Clicking on the Help button will open help text specific to the page you are in when you clicked on it.

1.6 Alerts Panel

Description
Any notifications will be listed here.   When an alert is triggered you will receive an email, and the alert will display on the home page (alert icon will display a notification).





Alert Type	Behaviour
Approval Request	When an object is waiting for you to approve it, a notification will display in your alerts.
Object Comment	If you are following an object, and someone comments on it, you receive an alert.
Replies to Comment	If you write a comment, and someone replies to it, you receive an alert.
Object Alerts	If an object is setup to alert administrators, owners, or managers on pass/fail conditions – an alert is generated and displayed here.
Expiring quiz, object, or course	If an object, quiz, or course has an expiration date and is close to expiring, an alert is displayed.
Observational Assessment Requested	If a direct report has req2uested an observational assessment, a notification is displayed here.
Object Marked	If you a User, and an observational assessment, or quiz has been marked, a notification is displayed.

2. Managing Users

Description
Fabric Administrators are responsible for adding new users, handling password resets, and editing user information.

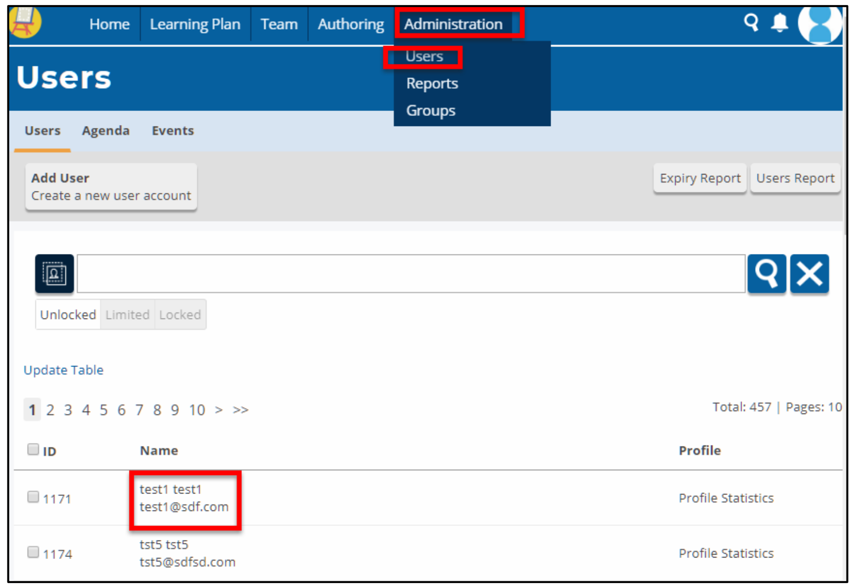
2.1 User Settings/Information

Description
User accounts require certain information in order for users to view, produce, and interact with Fabric content and data.

2.1.1 User Account Information

Description
User accounts have settings that determine how they access Fabric, and what content they can interact with.

1. User account information is accesed via the Administation menu, click Users, click the User Name, and click the edit icon.



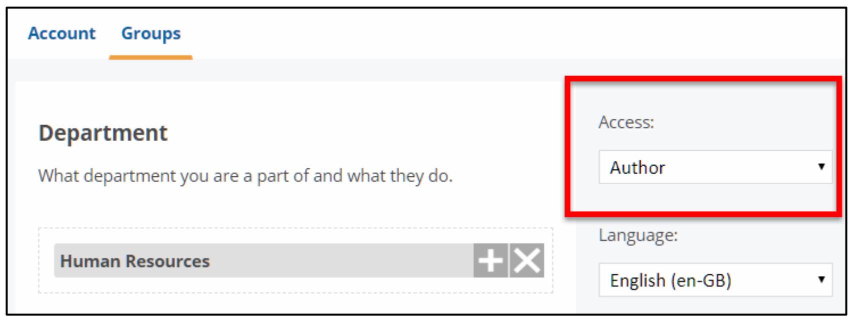
User Field	Behaviour
Impersonate Button	Click to login as that user and view the site as they would. While impersonating a user, that user cannot log in – you must log out as that user before the previous user can log in. Do not wait until session time out, if timed out log back in and restore the previous user.
Username	(Required) This is the users login.
First Name	(Required) Users first name.
Last Name	(Required) Users last name.
Email	(Required) Users email.
Phone Number	Phone number
Password	You can manually assign a password to users.
Confirm Password	Used in conjunction with the Password field. When manually assigning a password to a user, you enter it a second time in this field.
Avatar	Click choose file to upload an avatar image for the user (e.g. photo).

User Field	Behaviour
Flag	Flags can be setup to notify users that information requires collection or verification (e.g. privacy protection agreement updates). **Confirm Password:** Includes custom message on home, advising users to edit account password. **Confirm Account:** Includes custom message on home page, advising users to confirm info on their account (e.g. renew or register account. For example, some organizations require phone numbers for all users, some do not).
Email Notifications	Determines how often users receive email updates from Fabric. **Continuous:** Users receive updates on notifications sent via emails when created (within an hour of the post being generated). **Weekly:** Users receive update emails once per week (e.g. 5 posts will only generate 1 email). **Never:** No emails are sent for anything other than system generated emails (e.g. password reset emails).
Max Leaners	Max number of people who can report to this user (self service client sites).
Max Certificates	Track/Limit number of certificates (self service client sites) for you and all direct reports.
Max View of Results	Client specific functionality.
Color	Every user account can be assigned a hexadecimal colour. Colour shows in the calendar only.

2.1.2 User Access Levels

Description
Users are assigned an account access level that determines how they view, create, and manage Fabric content. Each access level provides different permission ‘rights’ access to users.

Access levels can be changed depending on your need. Not all Fabric systems will have the same access and permission relationships. All access levels can be renamed, and permissions reassigned depending on your requirements.

1. User access levels is found on the User Information page, under the Groups tab.	

2.1.1.1 User Access Level Permission Rights

Description
Each access level is assigned a set of permission rights. These rights determine what users of a particular access level can view, and interact with. Access level permissions can be customized to fill specific client requirements.

These permissions are attached to access levels. See the next chart to determine which access level includes the following permissions:

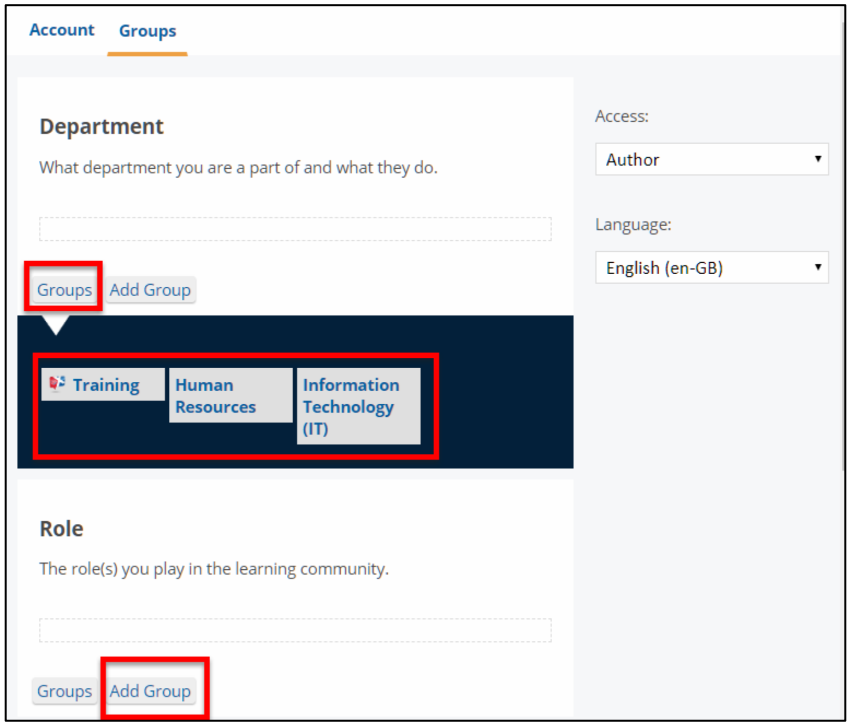
Permission Right	Behaviour
Marking Rights	Can mark quizzes and assessments, complete observational assessments (e.g. managers have marking rights to complete observational assessments).
Cohort Rights	Can create sub-groups within a team (working groups within a team).
Events	Can assign goals, and create events (managers could assign quizzes).
Post Announcements	Can create and send announcements.
Authoring	Can create courses, objects, and quizzes (you can create something, but only create it for local team, can't post it site wide unless have higher level admin permissions).
Moderator	A specific view that allows you to see all comments posted on a site. Can view all messages on the site. (Comments can include questions answers).
Class	Can create classes.
Publishing	Related to authoring, ability to publish across the whole site.
Reporting	Can run and view reports.

2.1.1.1 User Access Level Permission Rights

Level	Description of Permissions
Public	Nothing (have not registered yet).
Limited	This is a necessary access level to capture users that have not fully registered. (logged in but not fully registered, usually waiting to be approved).
Learner (Registered)	This is where all regular users of the system reside. Learners can access fabric, view announcements, and participate in courses (access content).
Manager	Supervisors or managers have marking, post announcement (team only), moderator, and team reporting rights.
Author	Authors have authoring rights, and limited publishing rights (to immediate team only unless site wide permission have been included).
Administrator	The highest level of access. Administrators can view the admin functions, and add/edit users, groups, and other administration specific functions.

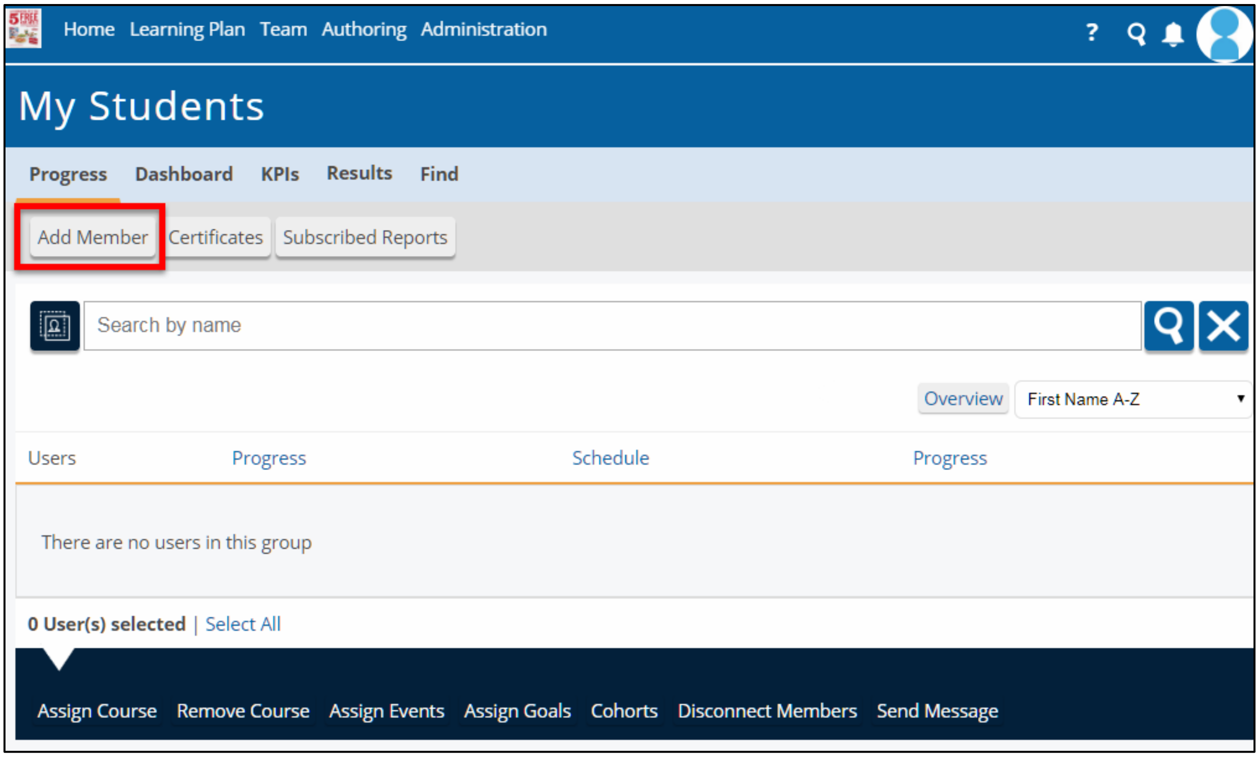
2.1.3 User Group Assignment

Description
Groups determine what users can see and interact with, and how they are grouped together for reporting. Permission and access will be restricted depending on what group they are assigned (e.g. Managers won't be able to assign learning items to individuals not in their group, etc.)

1. From the user settings page, click on the Groups tab. **2.** Each Header level represents a Group Type. To select a group to assign the employee, click the Groups button under the appropriate gropu type. **3.** A list of groups displays. Click on the group or groups to assign the user to them. **4.** You can add groups on the fly by clicking the 'Add Group' button found under each Group Type. See [Managing Groups]() for more information on creating groups.	

2.1.4 User Manager Assignment

Description
If setup on your Fabric site, Managers add new users via the Team → Management page.



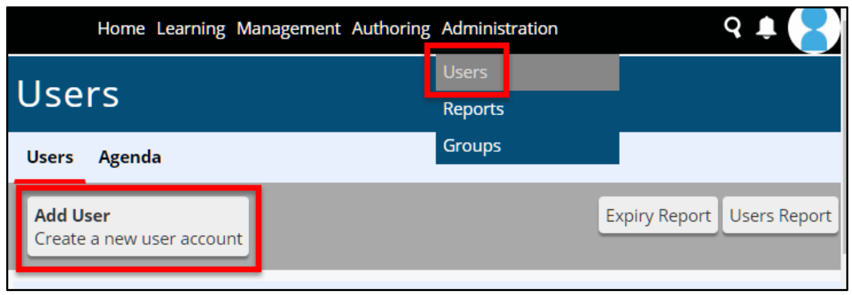
2.2 Adding a New User

Description
User accounts can be created different ways: • Admin Registration: Admins create accounts. • Self registration: users fill out a form on the site to create their account. • Invitation: users are sent a link to an account creation form. • Manager registration: Managers are responsible for creating accounts in their teams. • Integration with other user databases: users can log in by authenticating against an existing user database. • Paid registration: users self register and must pay to activate their account.

2.2.1 Manually Creating a New User Account

Description
Fabric Administrators have the authority to create new user accounts (and are the only user access level that can do so unless otherwise setup for your account by our developers).

1. From your Fabric home page, click the Administration menu item, and select Users.
2. Click Add User.



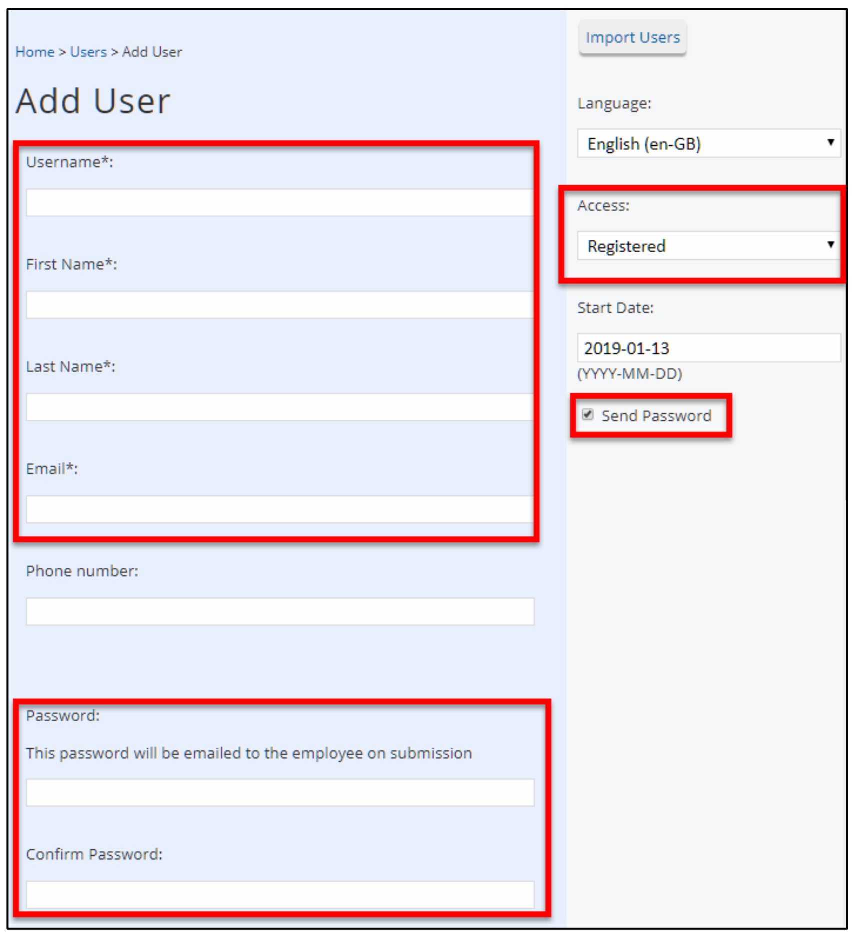
3. Enter User Account information.

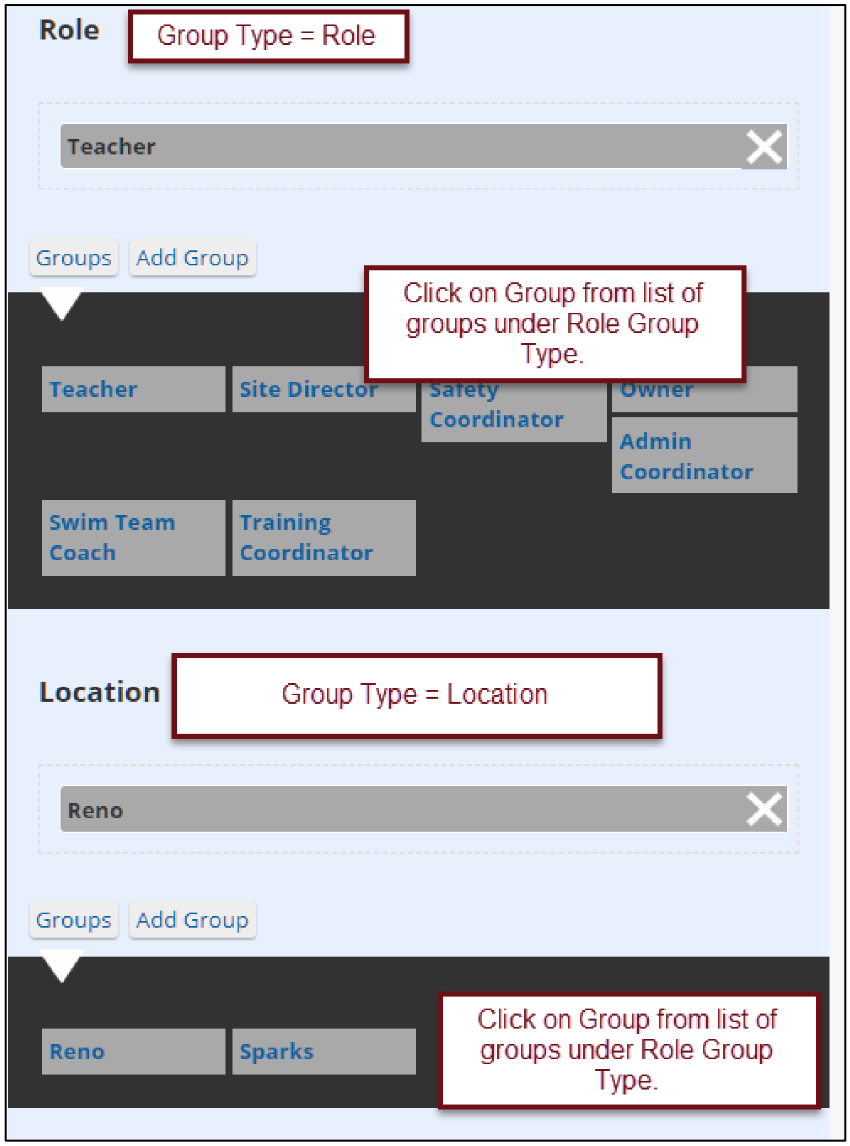
   We suggest using email for username to prevent duplicate accounts.

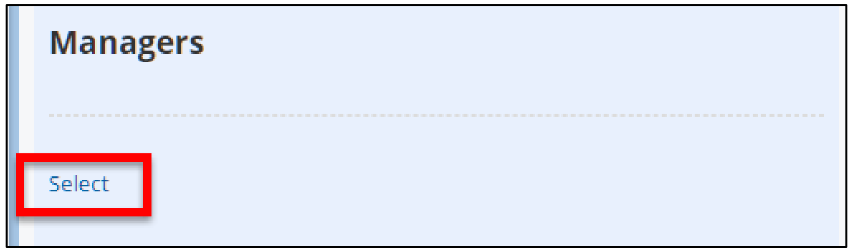
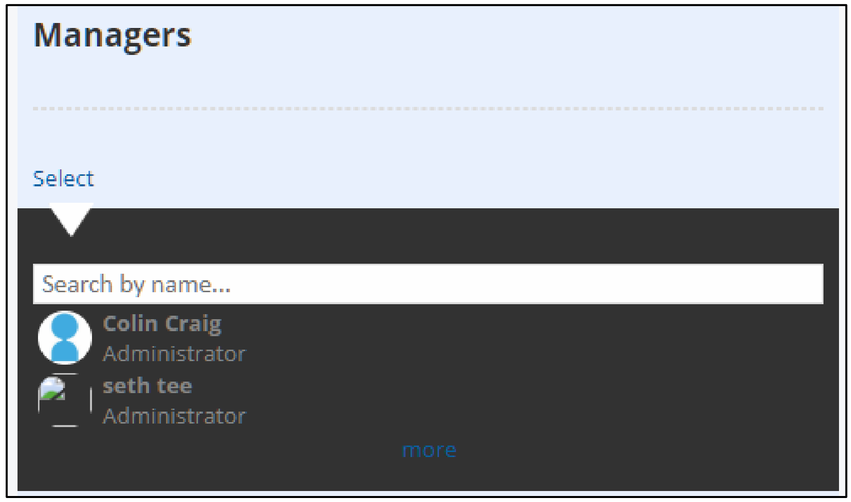
4. Select the access level for the user.
5. Enter a Password for the new user in the password field

   OR

   Click Send Password, and they will receive an email with a random password and opportunity to change it.

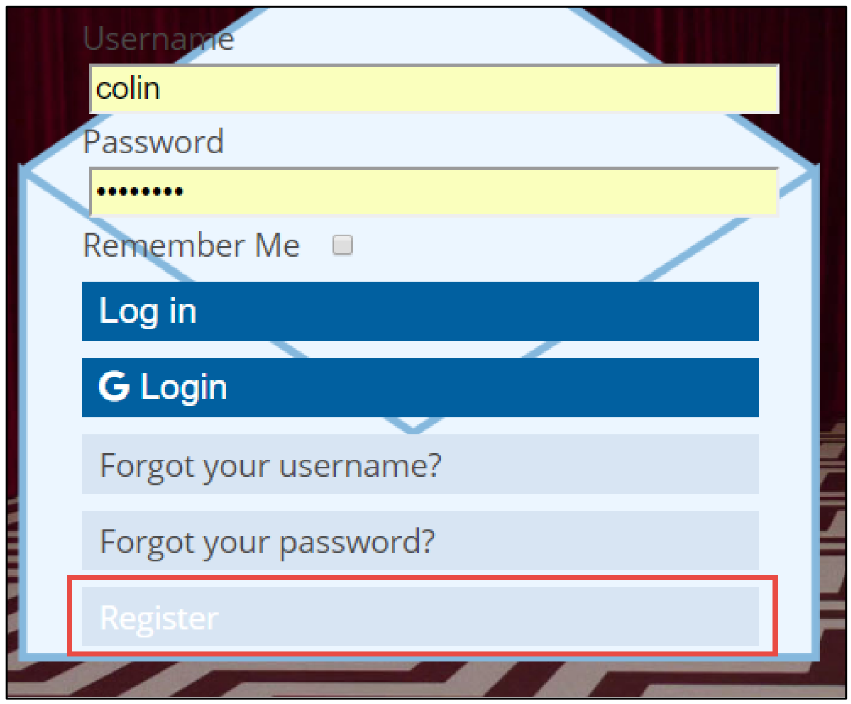


6. Select the Group(s) that they user will belong to by clicking them (for more information on Groups, see Managing Groups). Which group(s) the new user is added to will determine which Learning Plan(s) they participate in.	

7. Identify who the New Users manager is. Click Select under the Manager heading.	
8. Enter the first few letters of the new user's supervisor/manager, and select them from the list. The new user will now display under their managers 'team' page.	

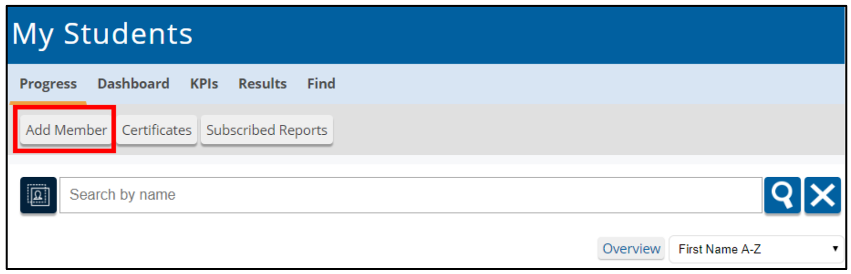
2.2.2 Registration by Invitation / Self Registration

Description
Users can self-register into your Fabric site by either clicking on the register button on the login page, or by being invited to self-register via a link to the registration page. How users will register will be determined in your site setup. While general users can be registered this way, all high-level employees (e.g. admins, managers, etc.) should be setup prior to general user registration.

1. From your Fabric login page, users click Register. **2.** Users will be required to enter their information directly into an account page.	

2.2.3 Manager Registering New User

Description
Fabric users with Manager access can add user accounts via their Teams page. Managers can only add new users to their own teams, and only with registered access level (e.g. no admins, authors, or other access levels).

1. From the Manager, Team page, managers click Add Member. **2.** Manager adds the user registration information, selects groups, and clicks the Submit button at the bottom of the page.	

2.2.4 Paid Registration

Description
Users can self-register with your Fabric system, by paying to activate their account. This is a custom feature. Can integrate with 3rd party payment gateways which restrict account creation until payment information has been received. Contact us for more details regarding this function.

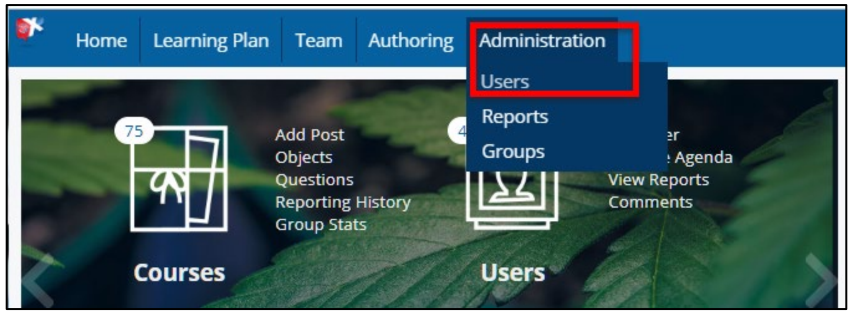
2.2.5 New User Setup via 3rd Party Integration

Description
Fabric can be setup so that users can log in by authenticating against an existing user database in 3rd party software. This requires integration with that 3rd party software, which is a custom project – Please contact us for more details regarding this service.

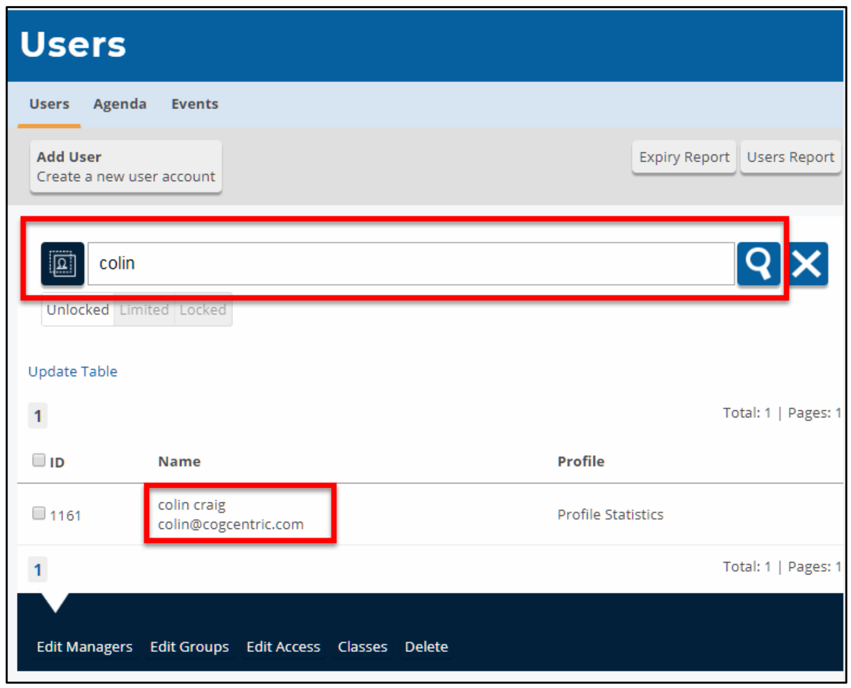
2.3 Editing User Account Information

Description
Administrators can edit user account information at any time.

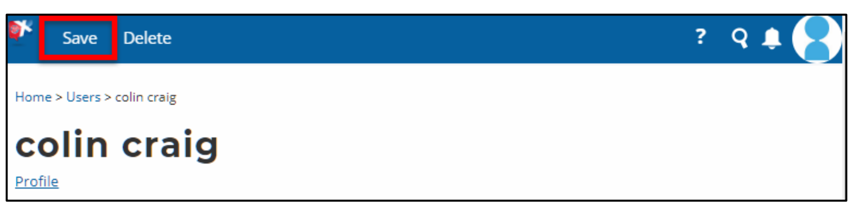
3. From your Fabric home page, click the Administration menu item, and select Users.



4. Search for User, and click on user name to open account settings.

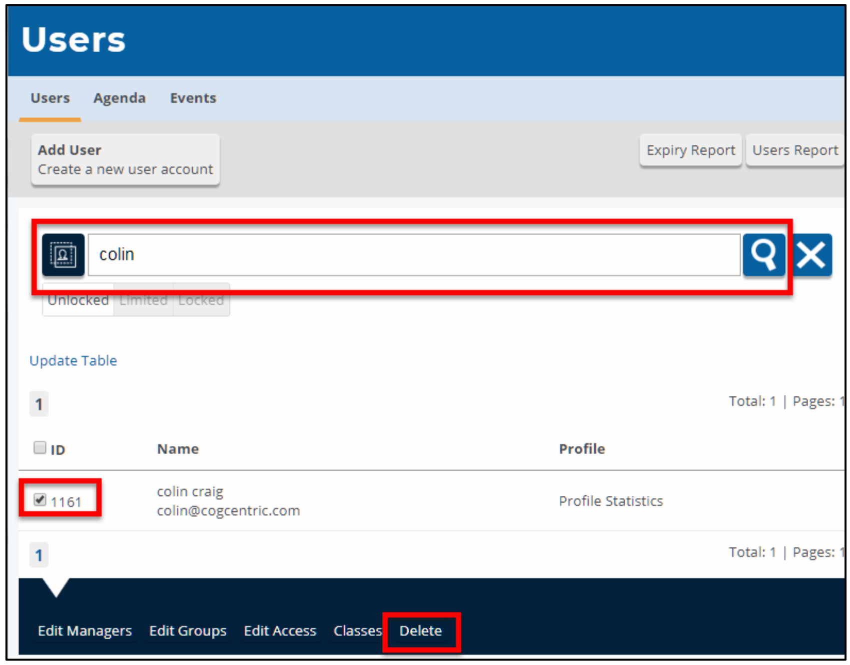


5. Update all necessary user fields, click Save to commit your changes.



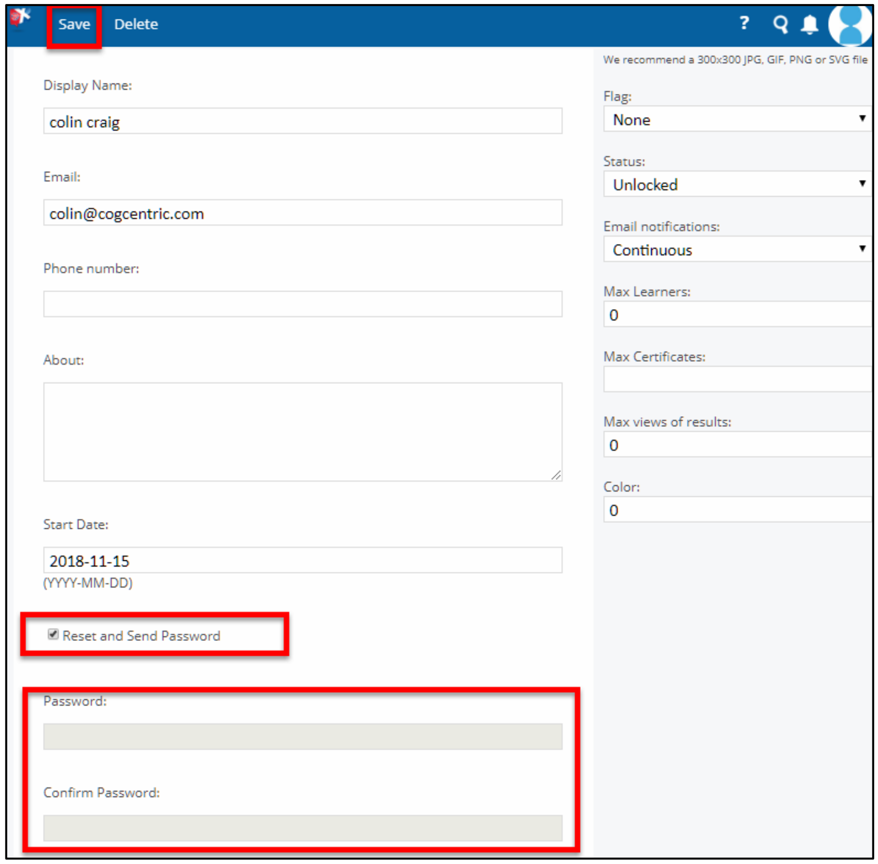
2.4 Deleting a User

Description
Administrators are the only users capable of deleting user accounts.

1. From the Users page, find the employee you want to delete. **2.** Select that employee account. **3.** Click Delete at the bottom of the screen.	

2.5 Resetting User Password

Description
Administrators can manually reset user passwords.

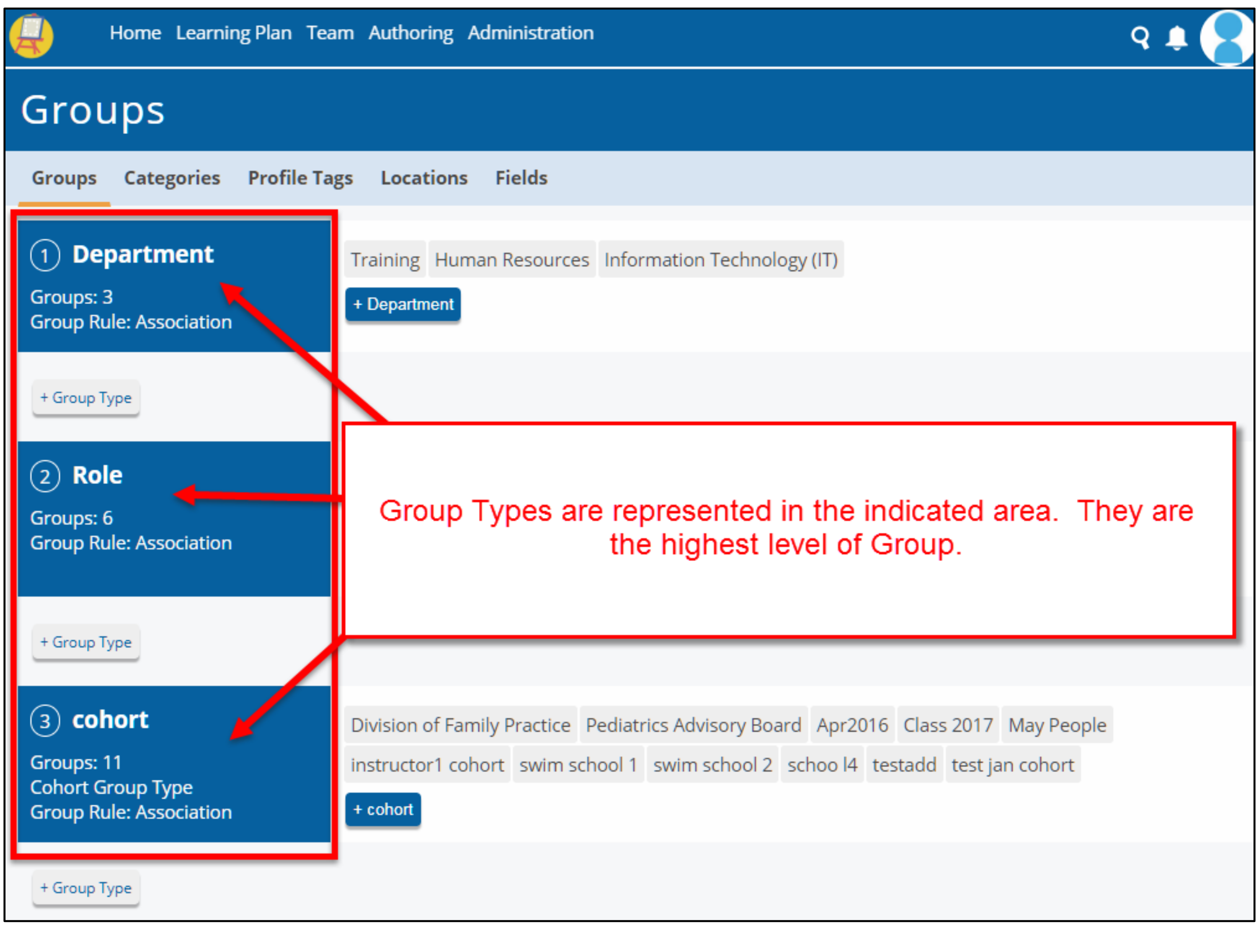
1. From the user settings page, find and select the "Generate New Password" checkmark box. **2.** Click Save. The User will receive an email with their new password, and will have a chance to update it. **OR** **3.** Alternatively, you can manually enter a new password in the Password, and Confirm password fields. Clicking Save will trigger an email notification to the user with the password you entered.	

3. Managing Groups

Description
All users have groups. Setting up groups correctly means that your LMS is optimized to deliver only custom-tailored content for your learners. Additionally, you can view reports to identify areas of your organization that are finding success or need improvement. Fabric uses group rules to ensure every user gets a custom-tailored experience. Groups ensure that the courses, objects, and posts accessed by the learner is intended for them. All forms of content on Fabric obey group access rules. This includes: • Courses • Learning Objects • Posts Groups ensure that Learners will only see content that is relevant to them.

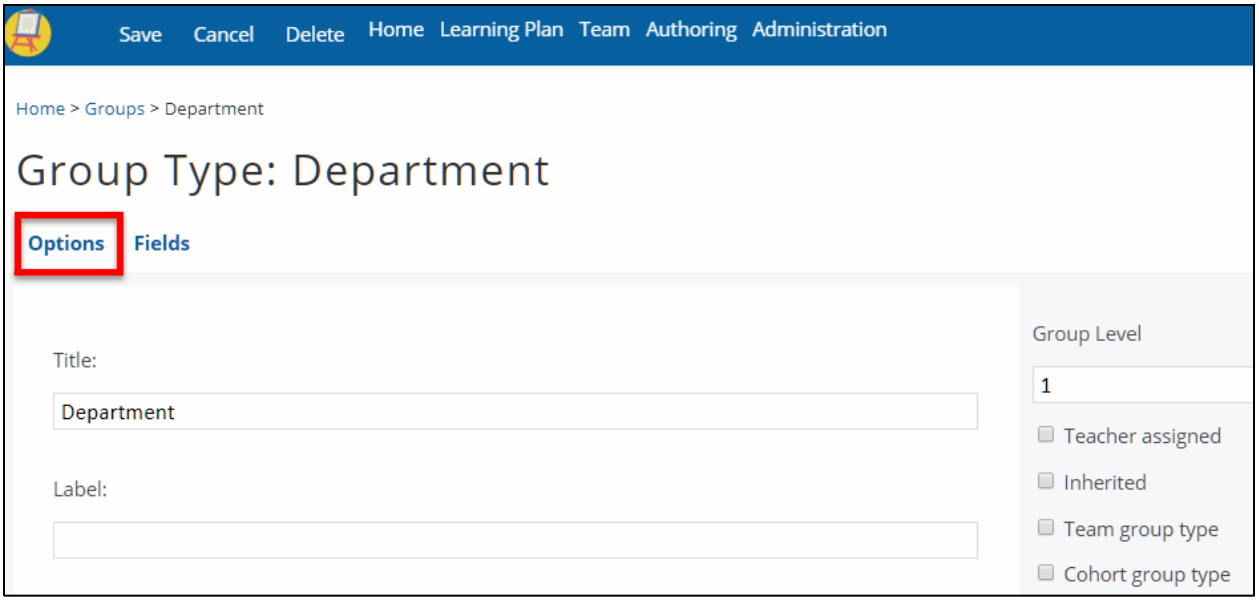
3.1 Groups Tab - Group Types

Description
Fabric uses group types, and groups to manage learners. This is especially important in assigning the right learning plans, to the right users. Consider a multi-national company with employees all over the globe – They may have multiple versions of their 'New Employee Orientation' program, and it's important that new employees receive the right training. They might setup a group type titled 'Locations', then create a group for each Location, listed under the Locations Group Type. **For Example** Group Type = Locations Groups Include: Washington, New York, Los Angeles, Seattle, Chicago Because of the different location groups, unique training courses that address location specific considerations can be published to specific groups. This means that a New York employee will participate in a different New Employee Orientation course than a Seattle employee. Groups are at the heart of Fabric's customizable, contextually specific distributed learning system.



3.1.1 Group Type Settings – Options Tab

Description
Group Type settings are where you configure the behaviour of a group type.

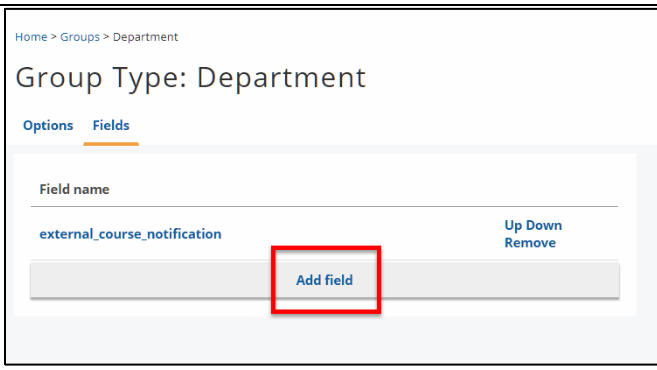


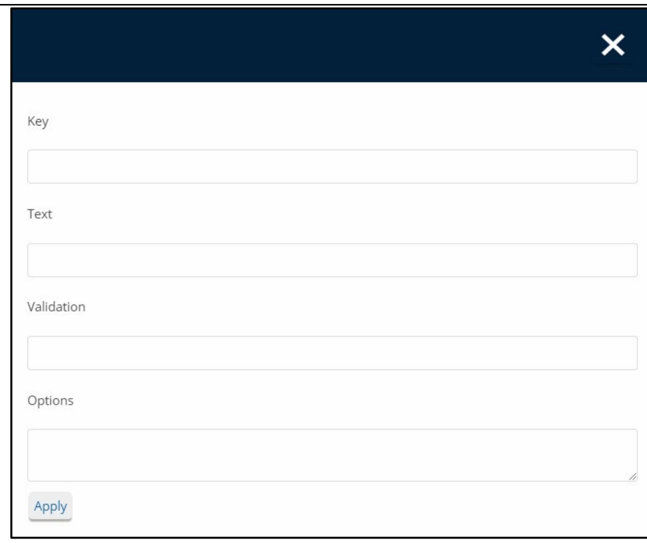
Group Type Setting	Description
Title	Name of the Group Type.
Label	(optional) If blank, defaults to title.
Description	Description of the group type. This description will display in the groups page to assist managers or administrator in making sure they select the correct group.
Group Display	Determines how the group will display. List: Groups are displayed as a list (can select multiple groups). Tags: Groups display as clickable items (can pick multiple groups). Dropdown: Click to open the dropdown list (forces you to pick only one group). Search and Select: Manually search for and select.
Group Rule	Identifies how the group type behaves. Association: Basic type, restricts who sees what. This is the default group type. Membership: Groups in this group types are members (not the users). EG: Groups that represent a collection of user (like companies) are members. Membership group rules effects things like payments, plan types, expiry and renewals, etc.

Group Type Setting	Description
	Event: These are groups that are created specifically for one event. Adds specific functions like date, price, and displays additional tab on admin users page called events. Location: Used for locations, and includes address fields (can be hooked up to google locations). Access: This type will always reflect the users access level. Group types must be exactly the same as the access levels, then when user access levels are selected, they are automatically placed in the appropriate group type (and changes automatically).
User Assigned	Allows users to select their own setting. This can be hidden. Hidden: Doesn't allow users to change their own group types. Selected: Allows users to change their own group types. Purchased: Allows users to change group types, via payment (hidden if payment type not setup on site).
Group Level (can we illustrate this?)	Groups with the same level have an OR relationship. Group with a different level have an AND relationship. For example: If you select a Department Group (level 1) AND a department Role group (level 2) when assigning a course, then only users who belong to both those groups will see the course. If you select a department group (level 1), and a locations group (level 1), then all users who belong to that group will see the course.
Manager/Teacher Assigned	Any manager level user can assign users to this group type. For example: A Role Type Group with this selected means managers can assign users directly into this group type.
Inherited	When manager creates a user, the user inherits the group type. For example, if a manager exists in the New Westminster group type, and they create a new user, the new user is automatically entered into the same group type as the manager who created them.
Team Group Type (most common)	Group within these types are enclosed working groups. The users in this group all work together in a team. How these teams are structured depends on the client (e.g A department can be a team, or a location, etc.). Team groups are grouped together for reporting. For example, team members and progress reporting.
Cohort Group Type	A Cohort group type allows non-administrator to group together users. For example, a manager can create a cohort group under this group type, and they alone can see this group. For example, a manager could create a team of people from a list of users (e.g. for a special project).

3.1.2 Group Type – Fields Tab

Description
You can collect additional information not included on the regular group type settings tab. Creating additional fields in a group type, will mean that all subsequent groups created under that group type will be required to enter the additional field information. This may be important if your organization requires to collect information not included on the standard settings page.



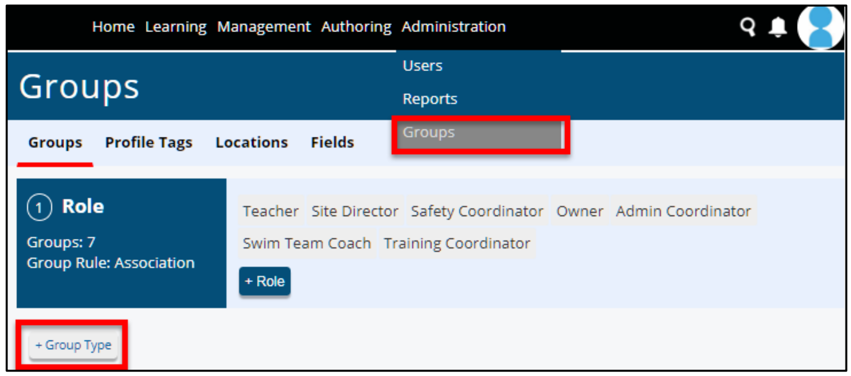


Group Type Field	Description
Key	The backend view of the field. For example, this is what is exported in CSV export. Example: Phone Number
Text	What the user sees as a field header.
Validation	This is an expression compared against user input data (e.g. numbers only? Then if user enters non-numerical data, it is invalid.
Options	Comma separated list of text, that appear as options to the user. Example: Pick your country question, then add all countries in separated by commas (would show as recommended option users select).

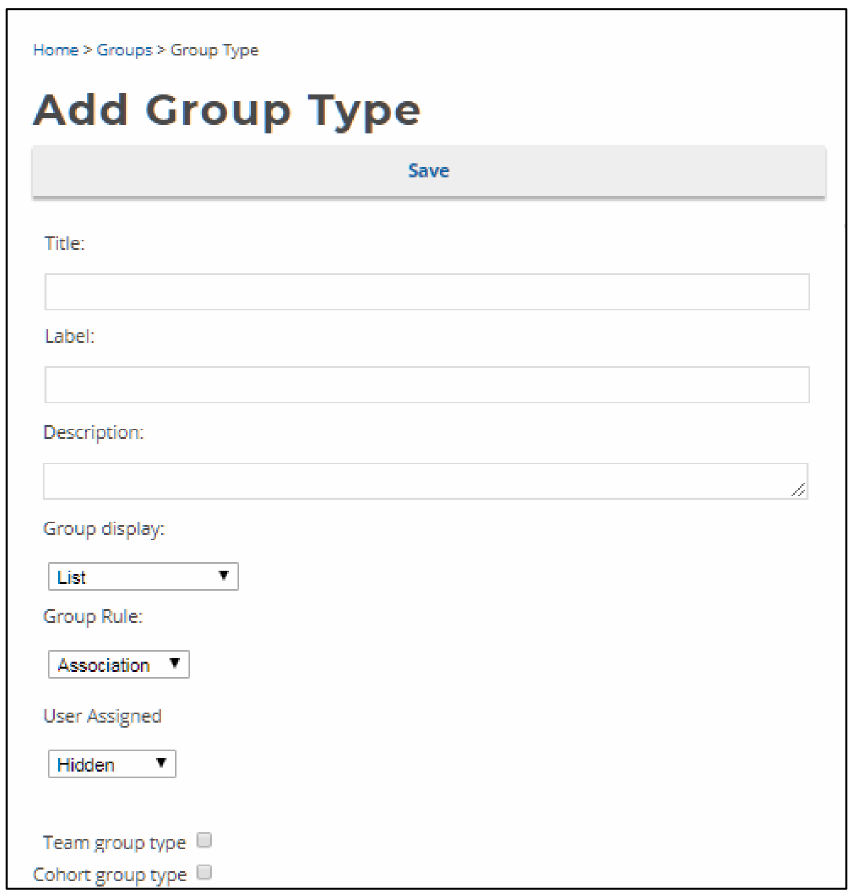
3.1.3 Creating a New Group Type

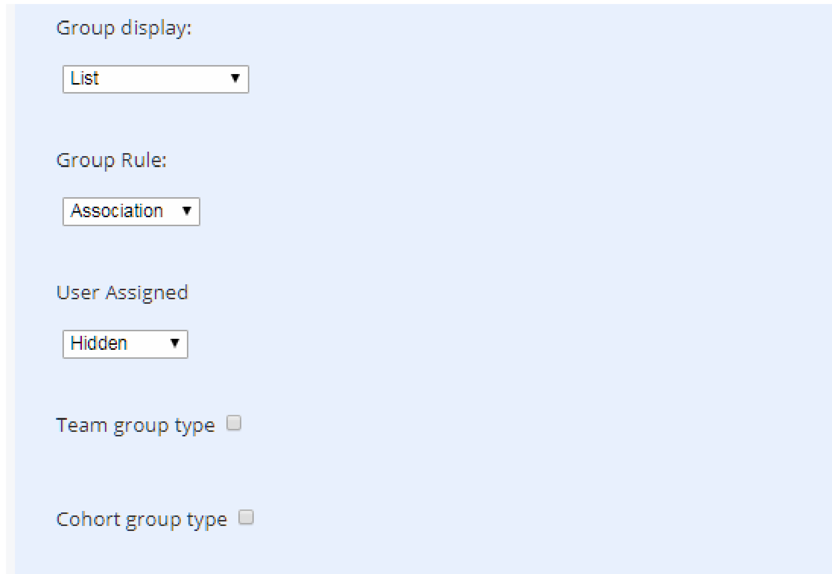
Description
Group Types are created by administrators in the administration groups page.

1. From your Fabric home page, click the Administration menu item, and select Groups.
2. Click the +Group Type button.



3. Enter the Group Type setting information.
4. Click Save at the top of the page.

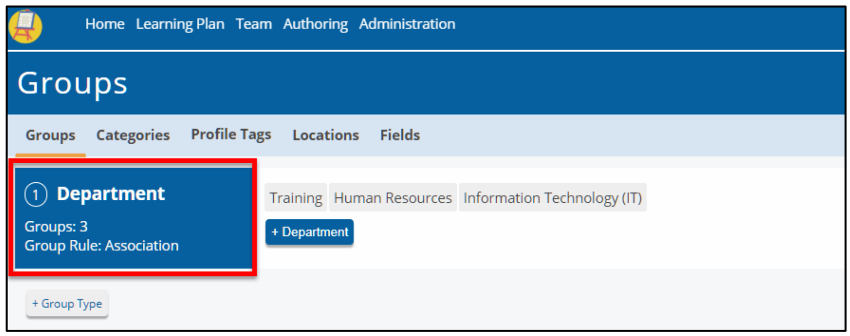


5. Select how the group will display. **6.** Select the Group Rule.	
7. Identified User Assigned. **8.** Select Team Group Type or Cohort Group Type. **9.** Click Save to create your new group type.	

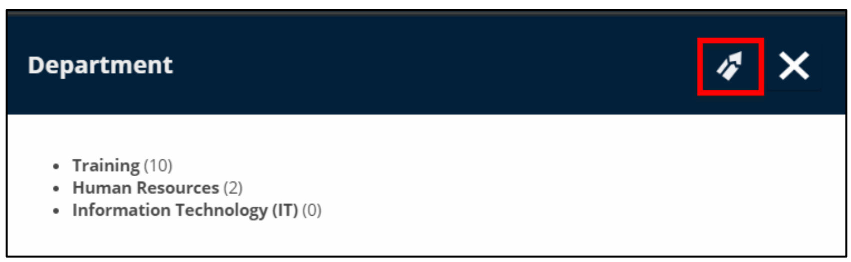
3.1.4 Editing a Group Type

Description
You can edit Group Type settings to change how they behave. Beware that changing group type information may change how users of the groups under the group view and interact with content. We recommend saving your original settings (e.g. screenshot, or in word) before making changes so that you can revert back to your old settings if necessary.

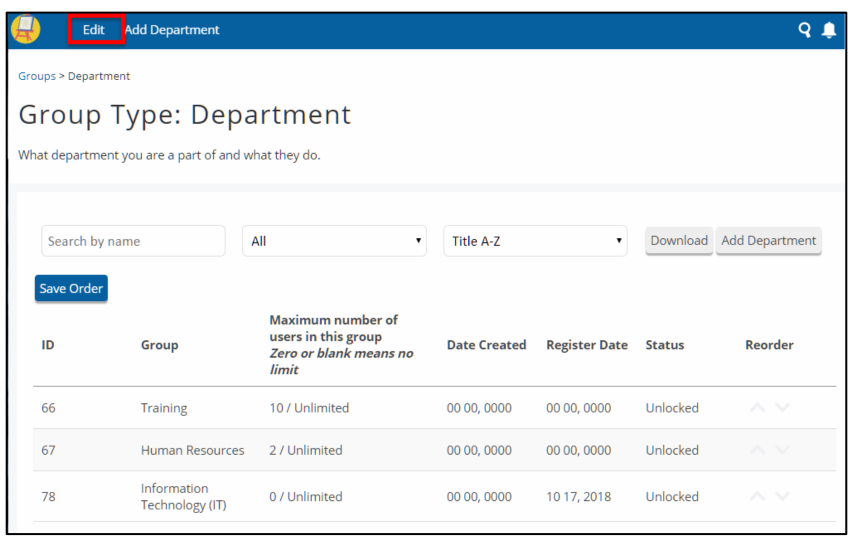
1. From the Groups Tab on the Groups page, click on the Group Type Header.



2. Click Edit.



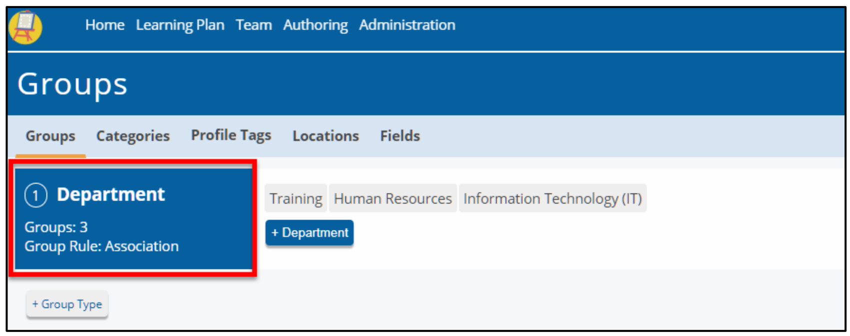
3. Click Edit to open the Settings page.



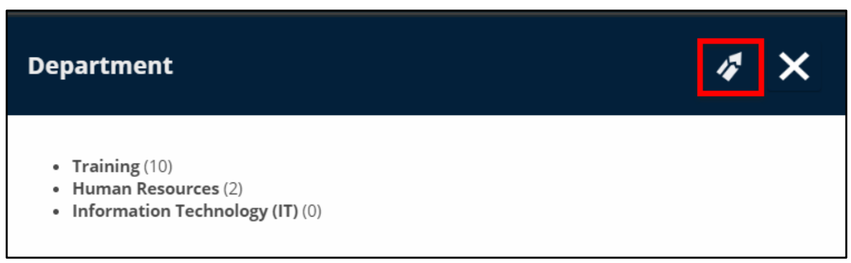
3.1.5 Deleting a Group Type

Description
Deleting a group type will delete all the groups inside the Group Type, and remove all relationship between that group type, the groups in that type, and any other content on the site (e.g. posts, course content associations, etc.). This means there are potential consequences when deleitng a group type. For example, if a piece of media only displays for a certain group listed under the group type you are deleting, once you delete that group type the media will display for ALL GROUPS in ALL GROUP TYPES. (When no group type or group display options are selected for media, then all groups see that media. Removing the only group type that media displays for means that no groups are selected, ergo all groups now see that media.)

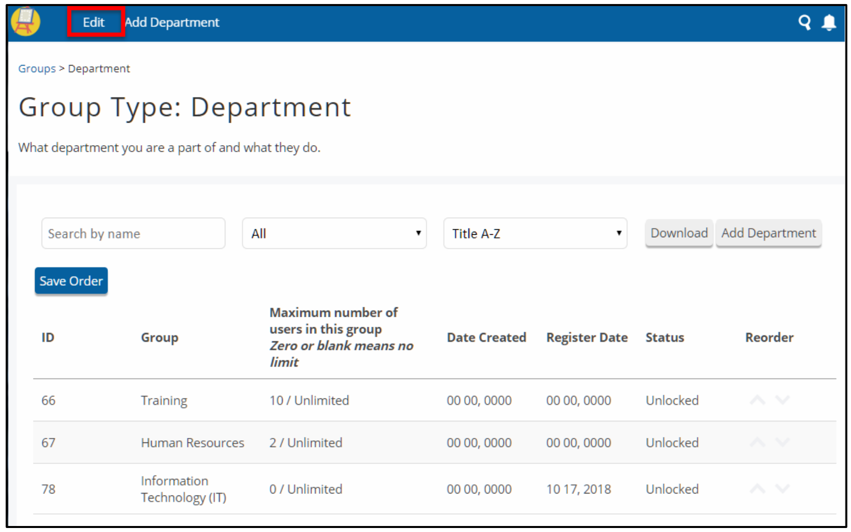
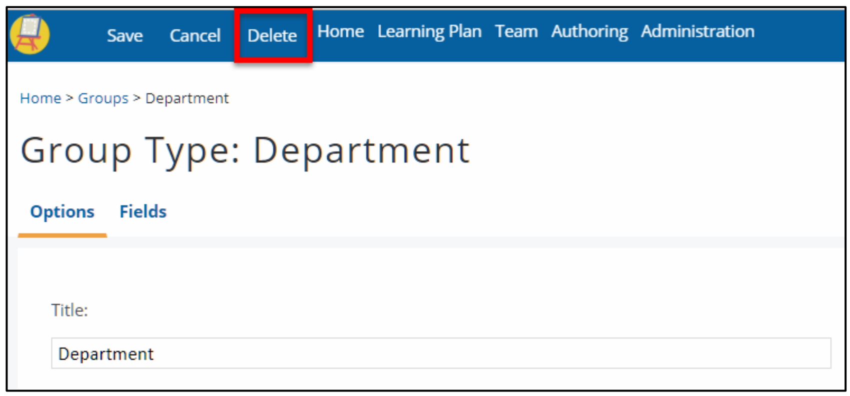
<table>
<tr>
<td>4. From the Groups Tab on the Groups page, click on the Group Type Header.</td>
<td>



</td>
</tr>
<tr>
<td>5. Click Edit.</td>
<td>

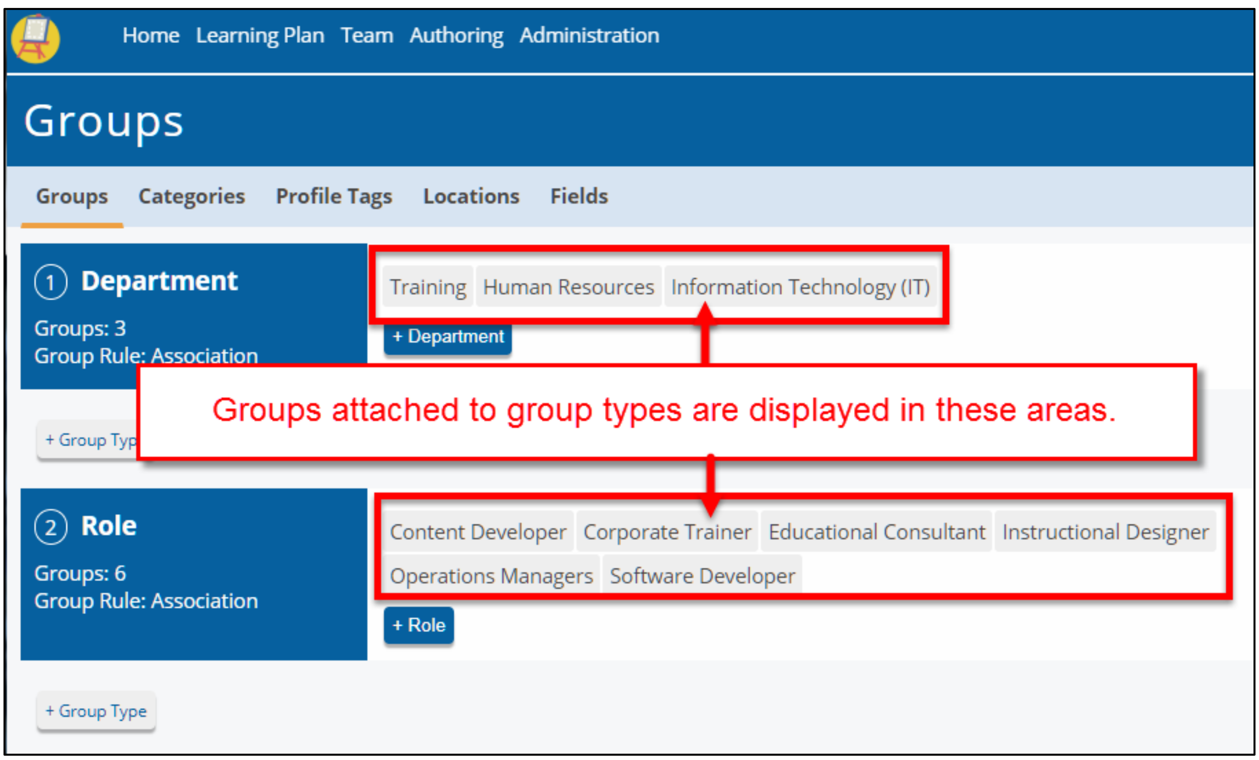


</td>
</tr>
</table>

<table>
<tr>
<td>6. Click Edit to open the Settings page.</td>
<td>
</td>
</tr>
<tr>
<td>7. Click the Delete button. Beware, deleting a group type will delete any child-groups attached to this group type.</td>
<td>
</td>
</tr>
</table>

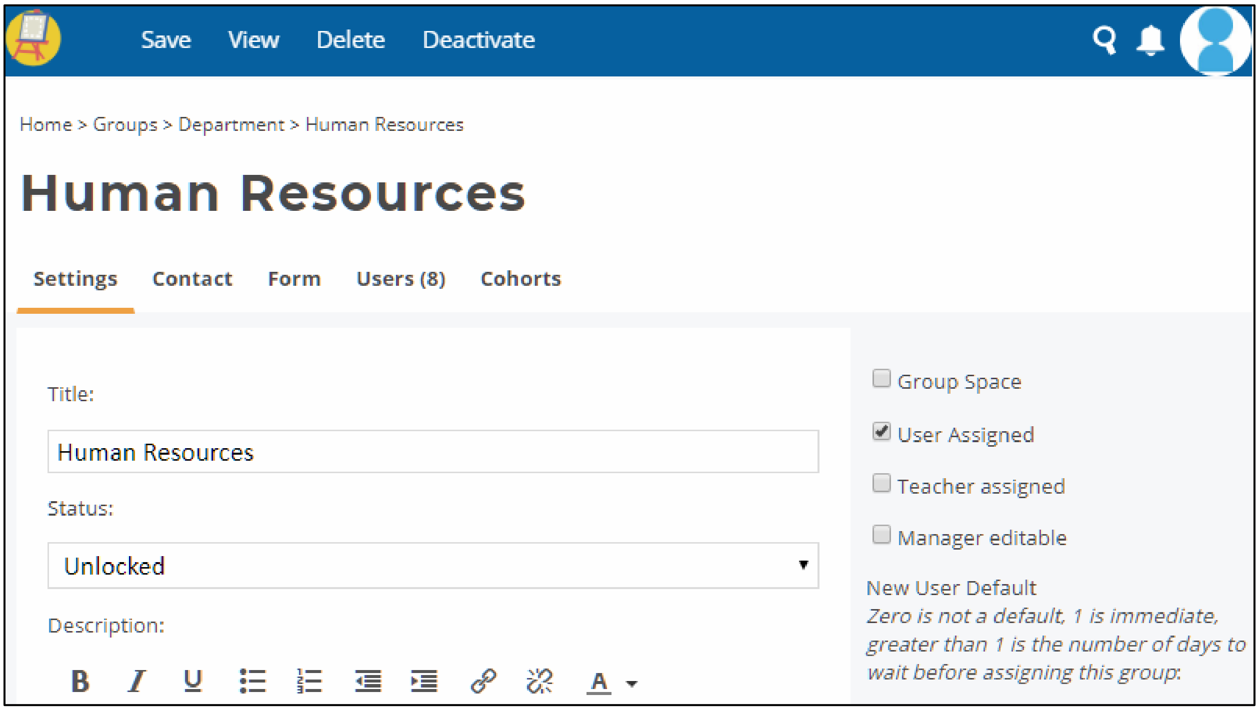
3.2 Groups Tab - Groups

Description
Groups are nested together under group types. You could say that group types are a 'category' of groups, where multiple related groups are stored. A group is a collection of employees that can be in the same department, team, or other related criteria. **For Example** Group Type = Locations Groups Include: Washington, New York, Los Angeles, Seattle, Chicago Because of the different location groups, unique training courses that address location specific considerations can be published to specific groups. This means that a New York employee will participate in a different New Employee Orientation course than a Seattle employee. Groups are at the heart of Fabric's customizable, contextually specific distributed learning system.



3.2.1 Group Settings

Description
There are different kinds of groups that you can create. How the group is setup determines how users in that group can view and interact with site content.



3.2.1.1 Group Settings Tab

Group Field	Behaviour
Title	Name of the group
Status	Unlocked: Fully functional active group. Locked: This group will not be selectable, and will not display to add users to. For example, you may want to lock an event group for an event that has passed, without loosing the data associated with that group).
Description	Describe the group here (e.g. what kind of grouping is it? Department?) Authors and managers may depend on the description of the group when they are assigning content to an audience.
Date Created	The date this group was created.
Register Date	The date the group was registered.
New Register Date	Check the box, and enter a new date to set a new register date. No need to use this unless you are setting groups via a payment form (helps with payment membership registrations and renewals). This field can be updated.
Expiry Days	Indicates the days that users expire from the group. Enter the number of days until users expires. Used for limited time-based groups (e.g. limited trials, new employee orientation welcome course for new employees, etc.).
Cohort Limit	Identifies the maximum number of child cohort group members this group can add (be linked too).
Payment Plan	Data collection purposes.
Cost	Enter the cost of becoming a member of this group. This cost refers to the cost of a USER joining this GROUP. For example, a 'premium' group that has additional content can be assigned a cost for joining (gold/silver/bronze).
CUSTOM FIELDS	This dynamically changes to display whatever custom fields you added for the Group Type of the Group you are working in.
Parent Organization	Selecting a 'Parent' will make the current group a 'child' of that parent group. Users in a 'child' group will automatically be placed in the 'parent' group as well. Logical links are created between child and parent groups. Using Roles and Departments as examples, you may want certain 'roles' to appear in every department. But some 'roles' only exist in certain departments. For example: Director and Manager roles may exist across all your organizations groups, but if you have a Training Specialist role that only exists in the HR Department, you would make the Training Specialist Role Group a 'child' of the HR Department Group.
Group Space	If selected, the menu bar can be customized to display differently for the group.

Group Field	Behaviour
User Assigned	If selected, users can assign themselves to this group, only if the group type they exist in allows it (see group type user assigned).
Manager / Teacher Assigned	If selected, manager/teacher can assign users to this group. If the group type of a user is not set to manager/teacher assigned, they will not be able to be added (see group type user assigned).
Manager Editable	If selected, managers can edit the group they exist in. They can change title, description, and other metadata but not the functional pieces that are required for the group to exist. This handy for managers to correct things like typos, and other basic information – without being able to change register dates or other information that may hinder access to the site.
New User Default	**0** = Users must be manually added to this group. **1** = Whenever any user is created on the site (by admin, manager, or registration), they are automatically added to this group. This become a default group that all users are automatically added. **2** or more: System checks the registration date of a user, and waits the number of days selected before adding automatically adding them to the group. For example, new employees may be required to wait 90 days before seeing course work as they haven't completed their probation period, or wait 365 days before they can self-select into management training courses.
Maximum Number of Users in Group	0 = unlimited. >=1: Sets a limit of users for the group.

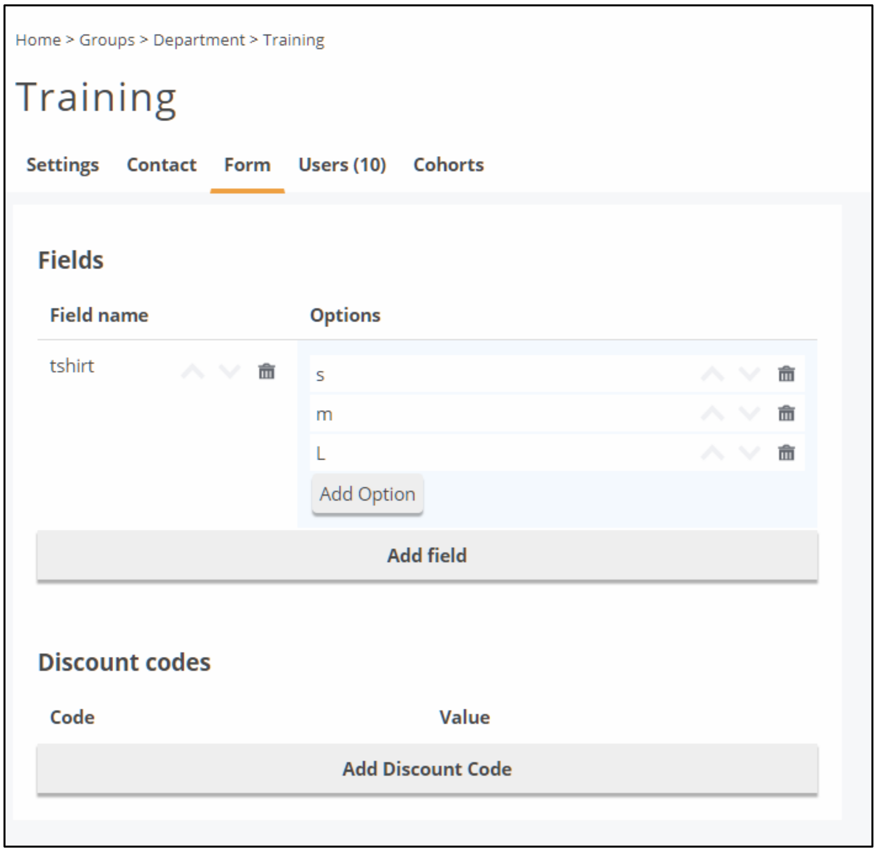
3.2.1.2 Group Contact Tab (Landing Pages)

These settings are not used unless you are using Landing Pages, a special function that is not used by all Fabric sites.

Group Field	Behaviour
Image	You can add an image that shows only for users of this group. The image displays on a special group landing page (such as a special event group, with a registration page).
Content	This announcement message displays under the image on the group landing page.
Contact Info	
First Name	Shows on Landing Page
Last Name	Shows on Landing Page
Email	Shows on Landing Page
Phone	Shows on Landing Page
Address	Shows on Landing Page
City	Shows on Landing Page
State	Shows on Landing Page
Zip Code	Shows on Landing Page
Country	Shows on Landing Page
Latitude	When entered this stores your location for applications like Google Maps.
Longitude	When entered this stores your location for applications like Google Maps.
Messages	
Registration Message	Self registered users will see this message after they register.
Reminder Message	Reminder message that is sent out to registered group members.
Post-Reminder Message	Message that is sent out after the event date.

3.2.1.3 Form Tab (Event/Member/Registration Controls)

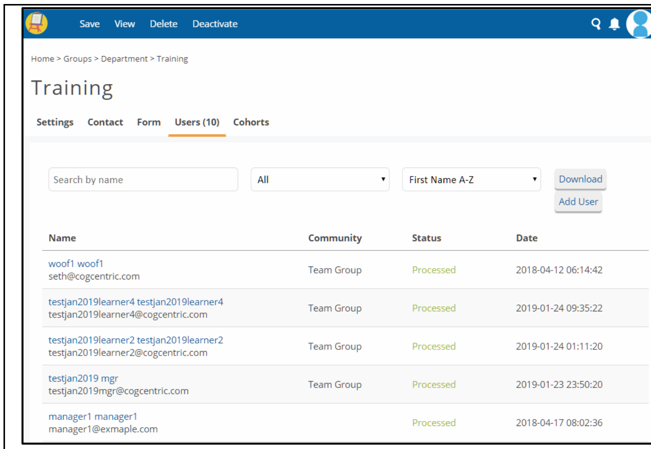
Description
This primary used to collect information from users registering into this group, for events and other registration-based activities.

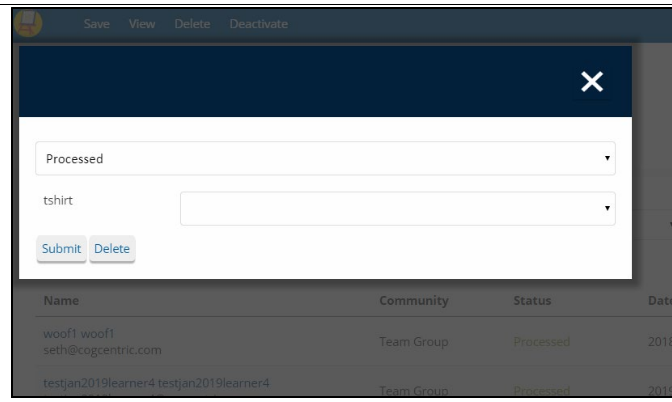


Group Field	Behaviour
Fields	Determines what custom information is collected from every member of this group. For example: if you want to collect information from users registering for an event (e.g. tee-shirt size, colour, etc.)
Discount Codes	Must be attached to a payment form, and can store discount codes.

3.2.1.3 Group Users Tab (Event/Member/Registration)

Description
Users who belong to this group are listed. Event registration information is managed here (information that was collected from users).





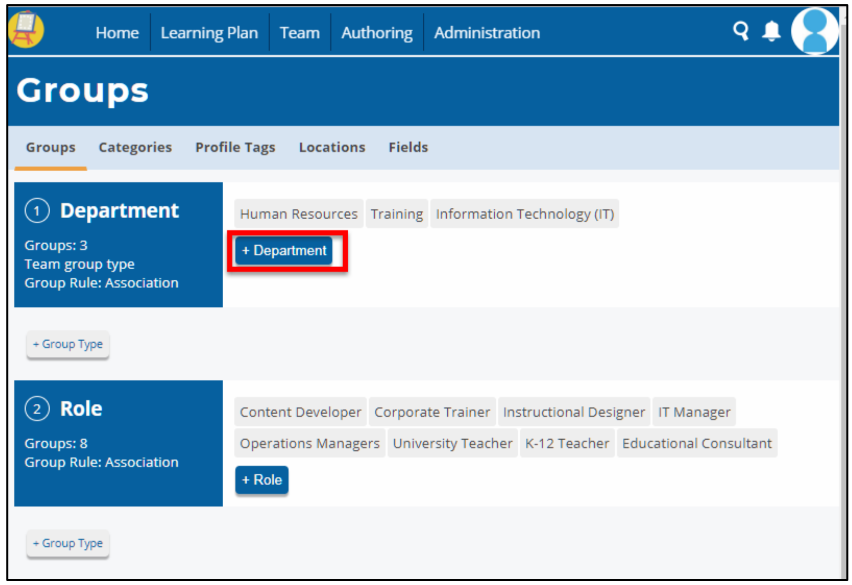
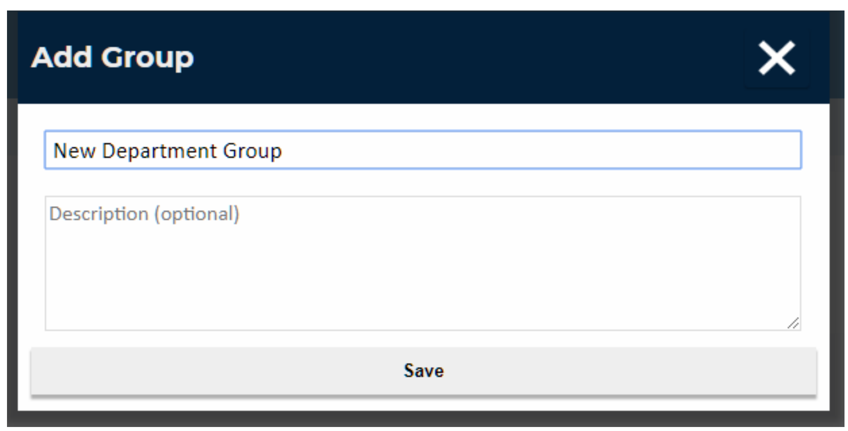
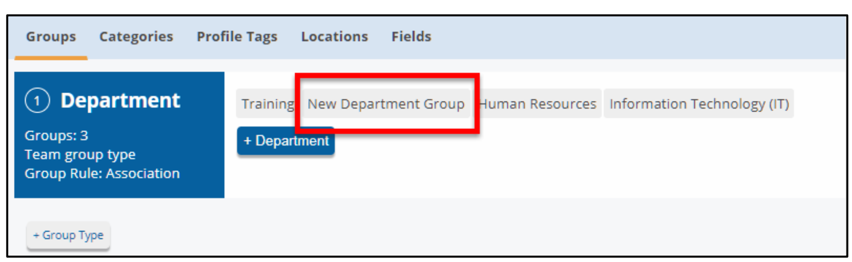
Group Field	Behaviour
Click on User Name	The fields created on the fields tab, will display under user account information. You can see what information is listed that was collected in the fields (e.g. what did they order for an event dinner) You can change the information that was collected here (e.g. I ordered a small, I wanted a medium). You manage event user information here.
Name Column	The users name.
Community Column	Lists the type of group the user is in.
Status	Users can have cancelled, pending, or processed status. Click on name to change status.
Date	This is the date the user was registered.
Download Button	Show as user's event selections (the field selections)
Add User	Manually add a user to this group (can be used where you did not have self-registration, or payment gateway setup).

3.2.1.4 Group Cohorts (Child Groups) Tab

Description
Cohort tab lists all the child groups associated with the group.

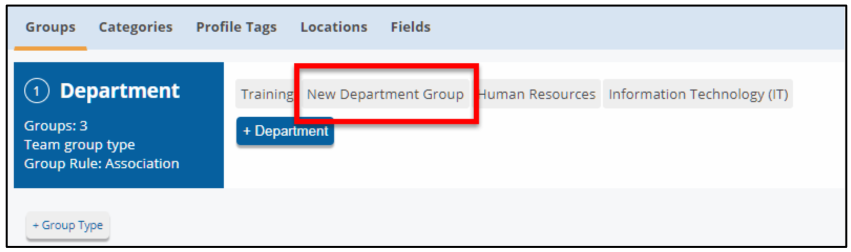
3.2.2 Creating a Group

Description
Groups are created under Group Types.

1. Go to you Administration, Groups page. **2.** Click +Group under the relevant Group Type to create a new group. (E.g. I’m creatinga new department group in this example).	
3. Enter a name and description, and click Save.	
4. Your new group displays in the Group Type. Click on it to change any group settings.	

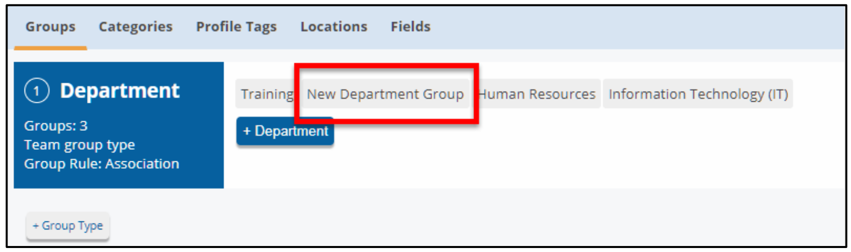
3.2.3 Editing a Group

Description
You can edit group settings at any time.

1. Go to Administration, Groups page. Find and click the group you want to edit.	

3.2.4 Deleting or Deactivating a Group

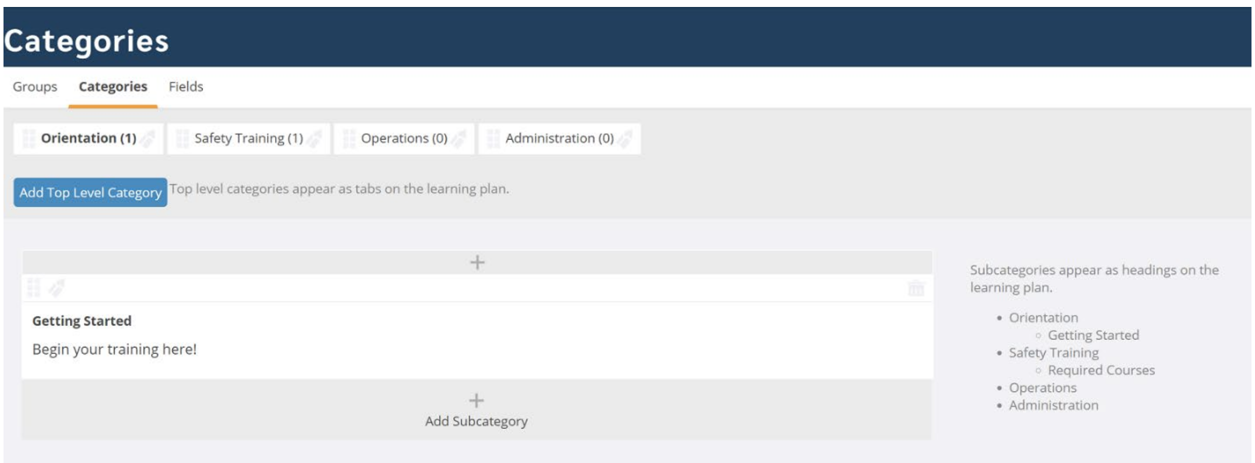
Description
Deleting a group will permanently remove it from your site. Deactivating a group will make it temporarily unavailable, and can be reactivated later at a different time (all child groups under the deactivated group deactivate as well).

1. Go to Administration, Groups page. Find and click the group you want to delete.	
2. Click the Delete or Deactivate button.	

3.3 Groups Tab - Categories

Description
Categories group together courses for display in the Learning Plan. This is a great way of grouping content together in relevant ways, and makes it easier for learners to find courses. Examples of Categories include: New Employee; Safety; Manager; Policy Training

Categories only display for users when they are assigned a course that is listed under that category. If no course under a category is assigned, users will not see that category listed in the Learning Plan.



The category editor page displays Top Level Categories across the top bar. These appear as tabs on the learning plan view. When a Top Level Category is selected (by clicking on it), its Subcategories are displayed as a list below. An outline of categories is displayed on the right hand menu.

You can reorder categories by dragging and dropping each category by the ordering handle in the top left corner. You can edit a category by clicking on the edit (pencil) icon.

3.3.1 Category Settings

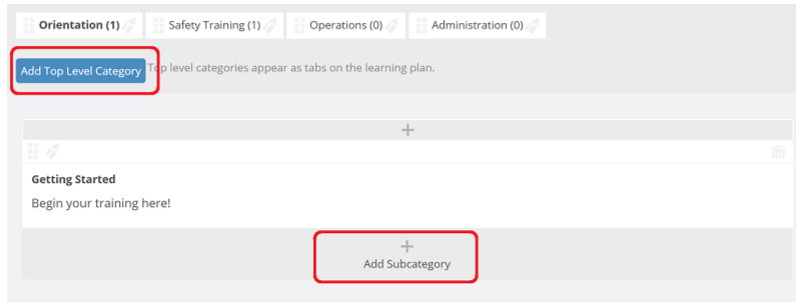
Description
Categories influence how courses are displayed in the Learning Plan.

Column Input	Behaviour
Title	The name of the category, this displays as a Header in the in the Learning Plans area.
Colour	Enter a hexadecimal value to change the background colour of the category header. Also effects the border colour of the courses listed under the category.
Order	Determines the order categories display on a page (e.g. the Learning Plan). 0 displays at the top. 1 after 0, 2 after 1, and so on. We suggest using 100, 200, and 300 so as to give you more opportunities to add additional categories at a later date, without having to change all the order numbers.
Level:	0 = Top Level Category (highest level of separation) 1 = Subcategory (not in top menu, cannot be selected until a top-level category has been selected) 2 = Sub-Subcategory (hidden). Used for ordering courses, course catalogue, and searching.
Parent Organization	Select a parent category, in which this category will display under. If none selected, this category displays You can only assign the course to a child group if the parent has been selected. If no parent is selected, this category appears in every instance of each category above.
Description	Add a description that defined or explains this category and displays to Users in their Learning Plan (audience is users).
Icon Upload	Upload an ICON that precedes your Learning Plan header.
Image Upload	Upload an IMAGE that resides in the background of your header.

3.3.2 Creating A Category

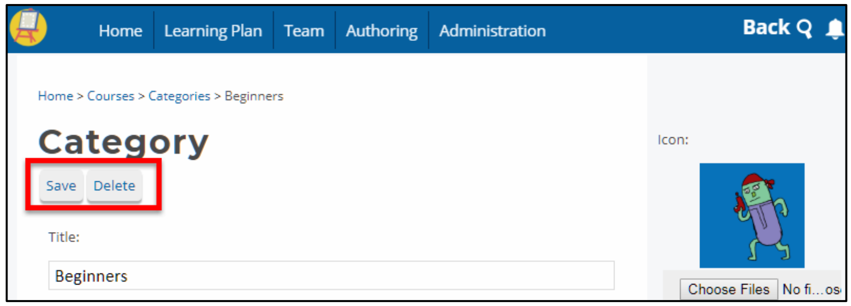
Description
Because categories can potentially impact all users and how they can see their Learning Plans, administrators are the only ones allowed to create them.

1. From your Administration, Groups page, click the Categories tab.
2. Click Add Category.
3. Enter the category information and click Save.



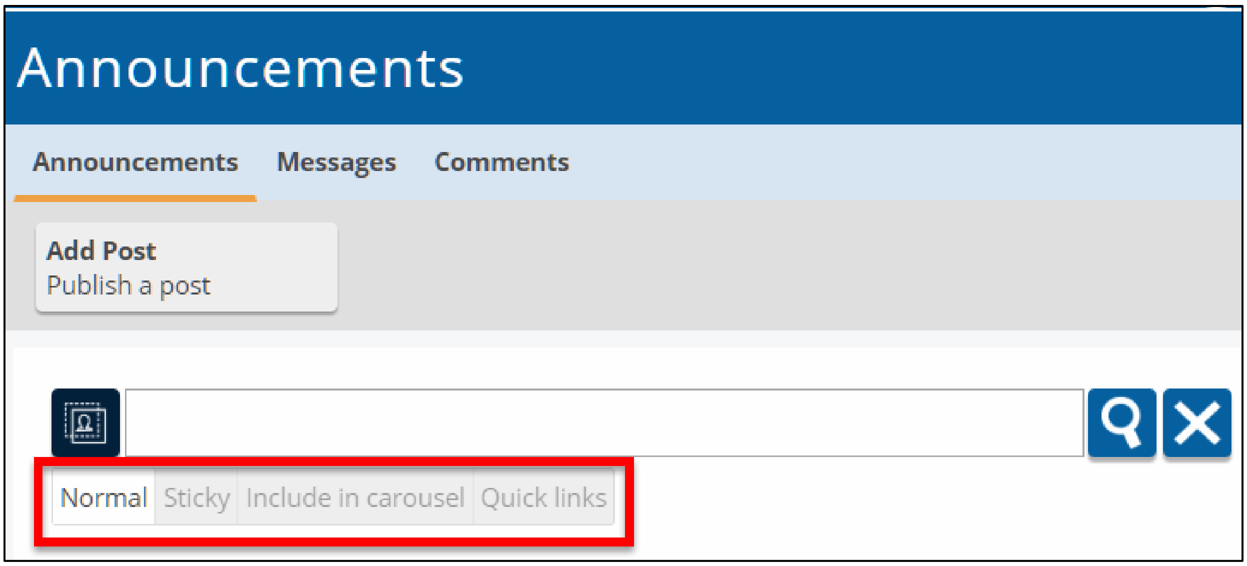
3.3.3 Editing and Deleting Categories

Description
Because categories can potentially impact all users and how they can see their Learning Plans, administrators are the only ones allowed to create them.

1. From your Administration, Groups page, click the Categories tab. **2.** Click on the category title to open it up for editing/deleting. **3.** Make your changes, and click Save or click Delete to remove the category.	

4. Announcements

Description
Announcements are messages that you can create, that display to users on the homepage, and can be pushed to users via their email address. All posted are ordered by date.



There are 4 different types of announcements:

Announcement Type	Behaviour
Normal	Displayed on home page. Most recent at the top.
Sticky	Displayed like normal post, but is always at the top of the announcements list.
Include in Carousel	Displayed on the home page carousel, and doesn't show anywhere else.
Quick links	Displays on the side bar, in a regular blog view, but can be viewed in a quick links priority view.

4.1 Announcement Settings

Description
When creating a post (announcement), there are several settings you use when creating your message.

4.1.1 Announcement Settings – Post Tab

Setting Field	Behaviour
Title	The title of the post that is displayed on the main page.
Image	Select an image to display with the post. The image can be: **Icon** = Icon image displayed in message, to the left of content. **Photo** = Sets the image as background of the announcement box, with text sitting overlaid onto the image. **Feed** = Display image in a banner image across the top of the announcement.
Description	Add the text of the announcement here, this is the message body.
URL	Leave blank, and a link to the announcement will be generated. You can replace this with another link, should you want users who click to be redirected to another site.
Read More Label	If you leave blank, it defaults to 'read more'. Replace with other text if required (e.g. click here to register).
Attachment	You can attach a single file, and that file is included with the email that is sent. Beware email size restrictions.
Priority	Announcements be set with different priority levels: **Public** = The announcement post is open for viewing **Draft** = In development, only viewable to you. **Private** = Only viewable to yourself (similar to Draft). **Archived** = Saved into the archive, and is not longer visible.
Language	Select English, French, or All.
Publish Date	If you leave announcement in draft, and set a publish date, announcement will publish on selected date.
Archive Date	Select a date to automatically move the announcement to archive status.

Setting Field	Behaviour
Notifications	**No Notification** = Announcement post will not generate an email notification. **Send Email**: Announcement post will send email. If user settings do not include email, they will not receive the post. See User Settings for more details. The email will send during the next hourly batch (default = 500 per hour).

4.1.2 Announcement Settings – Group Tab

Setting Field	Behaviour
Recipients	You can send specific messages to specific groups of people, without having to select them manually or rely on their group settings. Click and enter search term for the user(s). You can search by any user settings (e.g. First name, last name, city, state, etc.).
Groups	Select the groups you want to send the announcement message to.

5. Learning Plan & User Progression

Description
Courses are assigned to users via their Learning Plan, and as administrator, you will be asked to report on user Learning Plan progress.

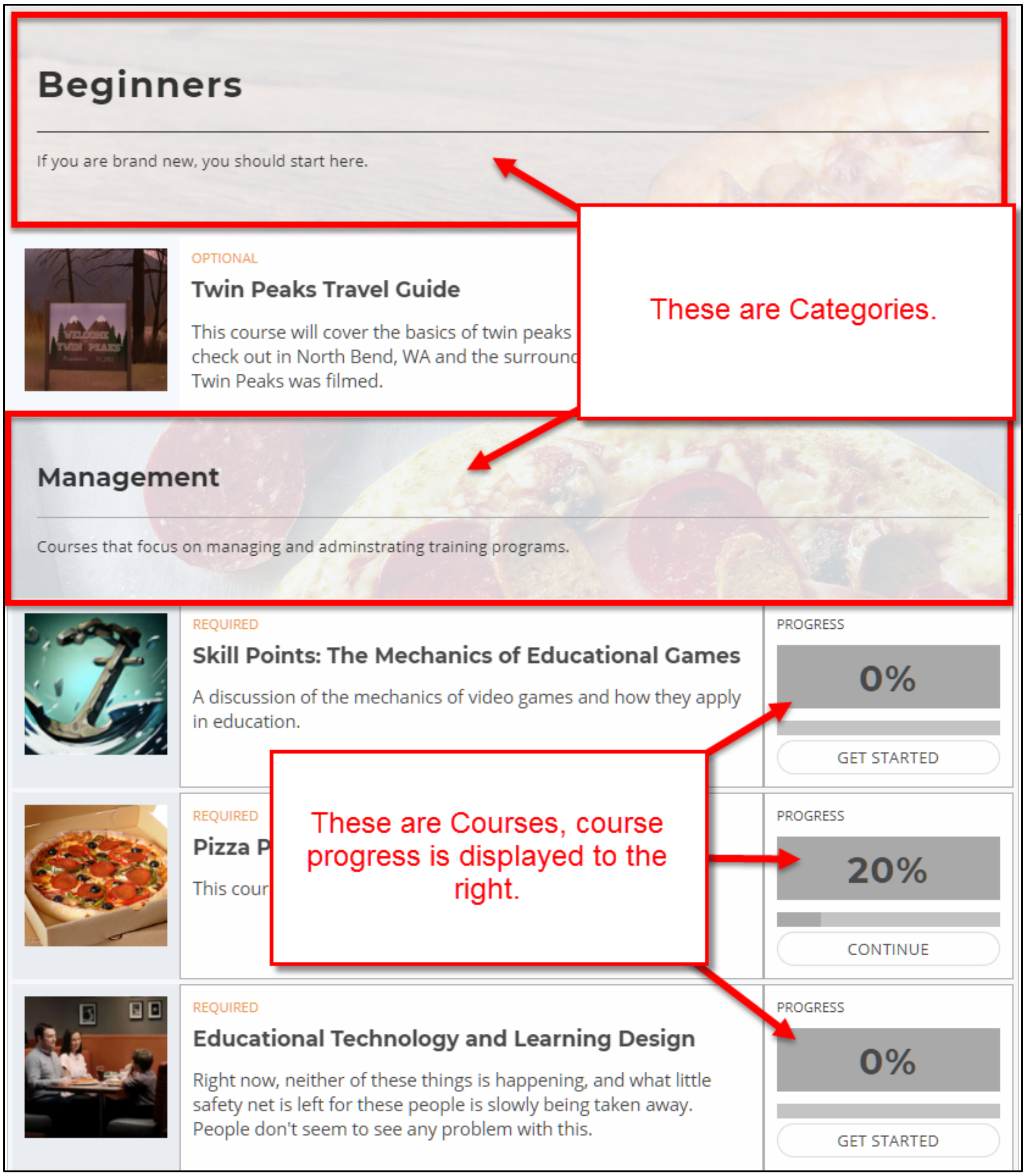
5.1 Learning Plan Settings

Description
There are no explicit LP settings, LP's display and act according to rules from the site (e.g. Course settings, Categories, etc.). See Groups Tab – Categories for more information on how Categories are handled, which in turn affect how they display in users Learning Plans.

5.2 Viewing Progress Page

User Scores and Progression.

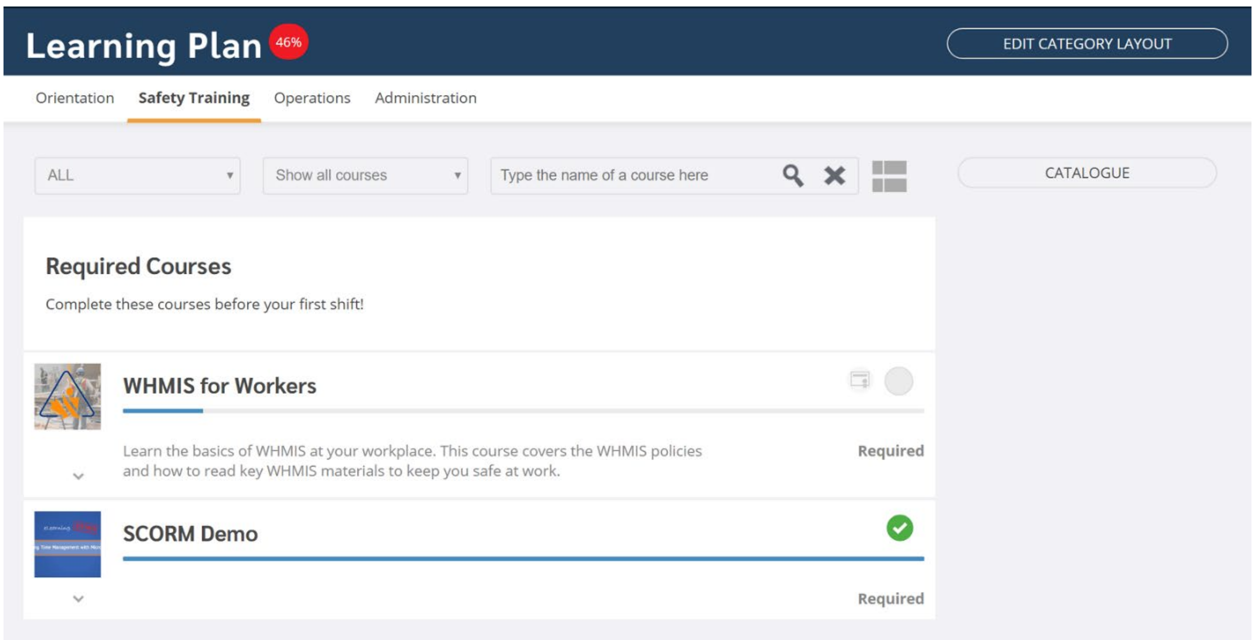
User progression is a number that is calculated by determining the number of required objects that have been completed. This is represented as a percentage, and considers Sections that are required to be completed, and required courses only. Optional courses and objects do not count toward this percentage.



Learning Plan Filters

Courses on the learning plan can be filtered by:

- Tabs (Top level categories): select a tag to display the courses in that category.
- Subcategory dropdown: select a subcategory in the first dropdown menu to display only courses in that subcategory (with a specific heading).
- Course assignment status: filter a course based on your assignment status
    - Show all courses: show all courses in the learning plan.
    - Show incomplete courses: show only incomplete courses (e.g. what you still have to do).
    - Show complete courses: show only complete courses (e.g. courses to look up past results and certificates)
    - Show assigned: show only courses specifically assigned by a manager.
- Keyword filter: enter a keyword to search for a specific course.

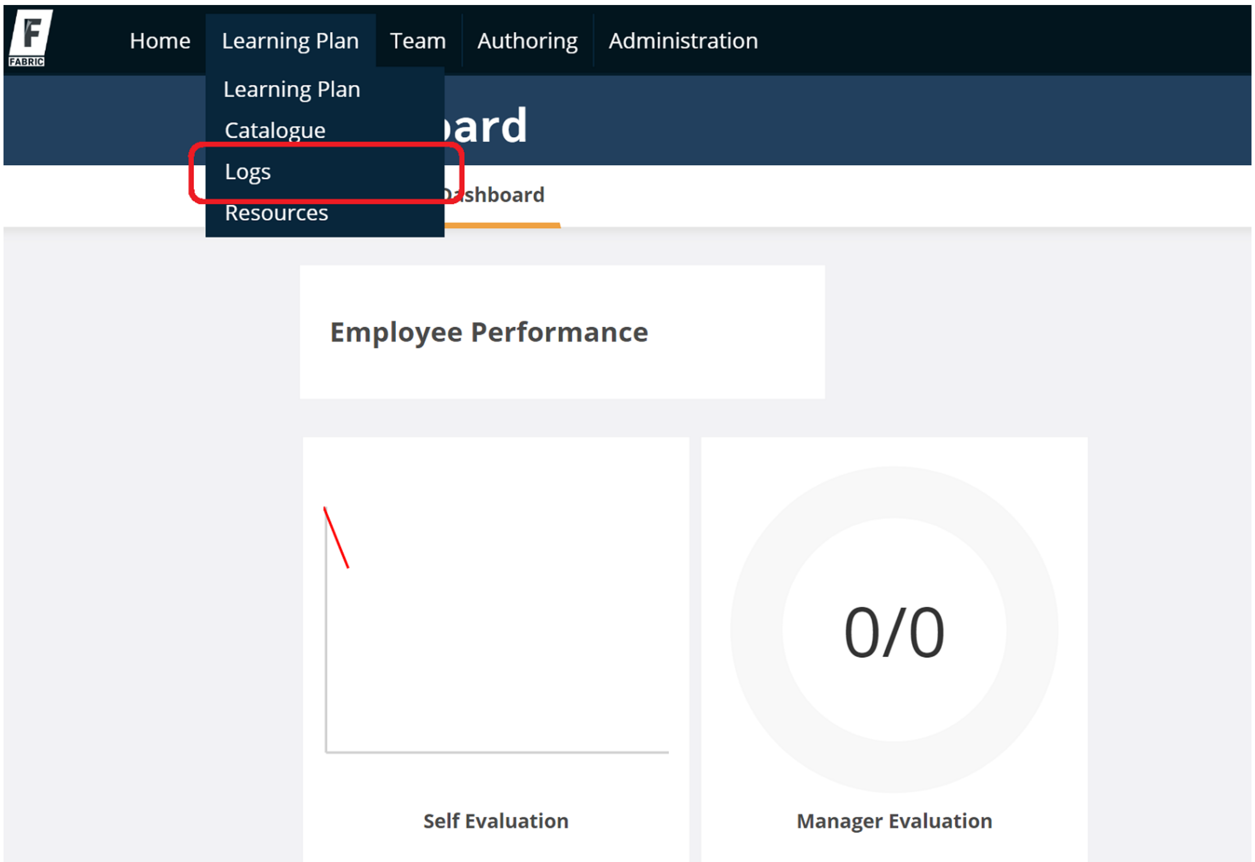


5.3 Viewing Logs and Submissions

Description
Logs could be described as checklists that you want to track. This could be an observational assessment (skill review), or a checklist that someone completes (e.g. inventory), performance (team or KPI).

5.3.1 User Viewing Logs

Description
Users view logs on their Learning Plan page (e.g. observational assessments, checklist to complete, etc.)



5.3.2 Manager Viewing Logs

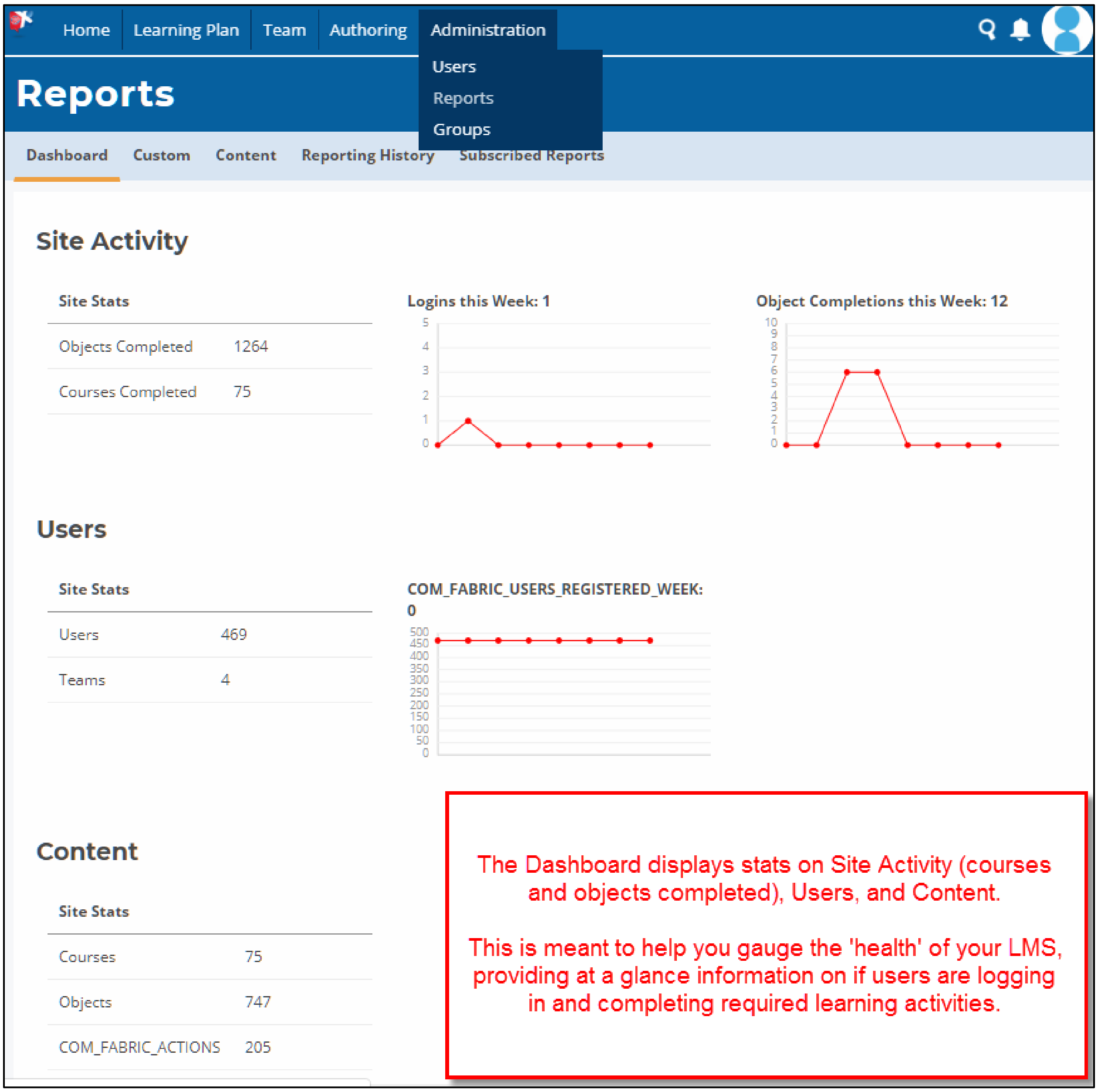
Description
Managers can view direct report logs on the Team Management page. Search for the team member, and click on their profile to find and view the log they completed.

6. Reports

Description
The Reports page includes information on users, courses, objects, and more. This is where you can search for, and download report information on completion data and other recorded events.

6.1 Dashboard Tab

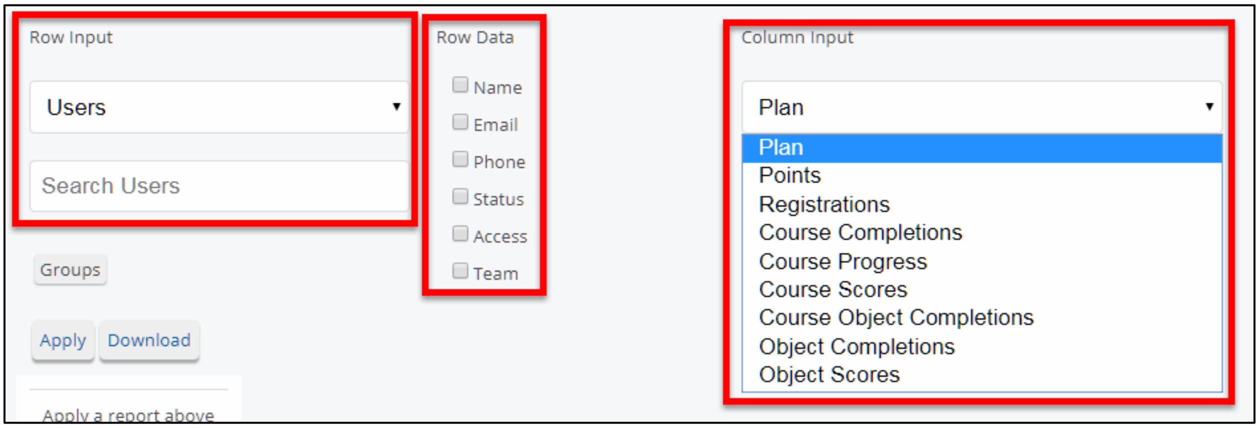
Description
The Report Dashboard tab includes at a glance information regarding your site activity, user count, group, and content statistics. This is where you can gauge the activity and general health of your Fabric site.



6.2 Custom Report Tab

Description
Custom reports functionality allows you to select what you want included in your report. You can run custom User or Team reports (your Row data), against column input.

6.2.1 Row Input (Users or Teams)

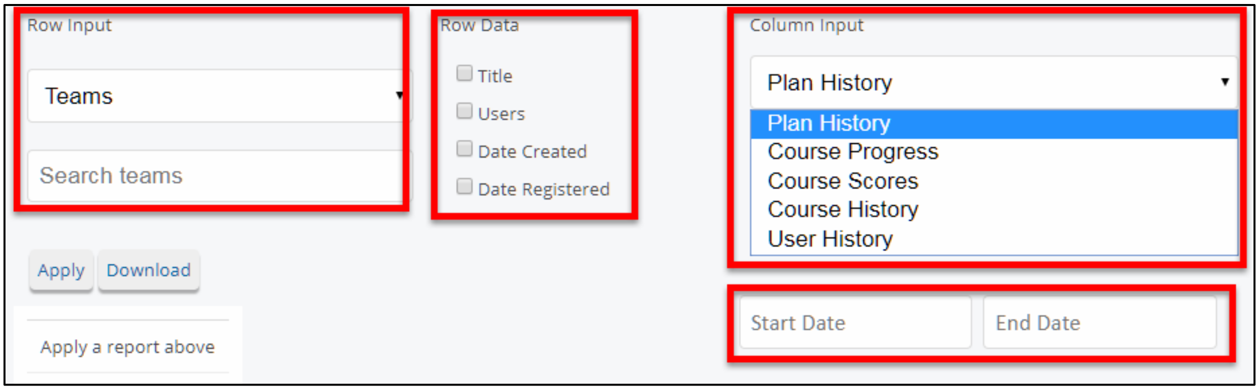


You can select either Users or Teams to report as your Row Data (defined below).

Selecting Users Row Input – Column & Row Data Settings:

Column Input	Behaviour
Plan	Reports on Learning Plan progression.
Points	Reports on user points progression (must have objects that include user points, a feature that may be disabled for your site).
Registration	Reports on the number of course registrations. Click Add Course to filter against a course, and the report will identify which users have completed it (registered, or not registered).
Course Completions	Reports on course completions. Select courses to include in the report, and report on which users completed.
Course Scores	Reports on course scores.
Course Object Completions	Reports on completed, course related objects.
Object Completions	Reports on all object completions.
Object Scores	Reports on object scores.
Other Functions	
Search Users	A search bar to search for specific users to include in the report.
Groups Button	Click the groups button to select groups of users to include in the users report.
User Row Data	Click on the corresponding row data checkmark box to include it with the row data. Name, Email, Phone, Status, Access, team, Groups

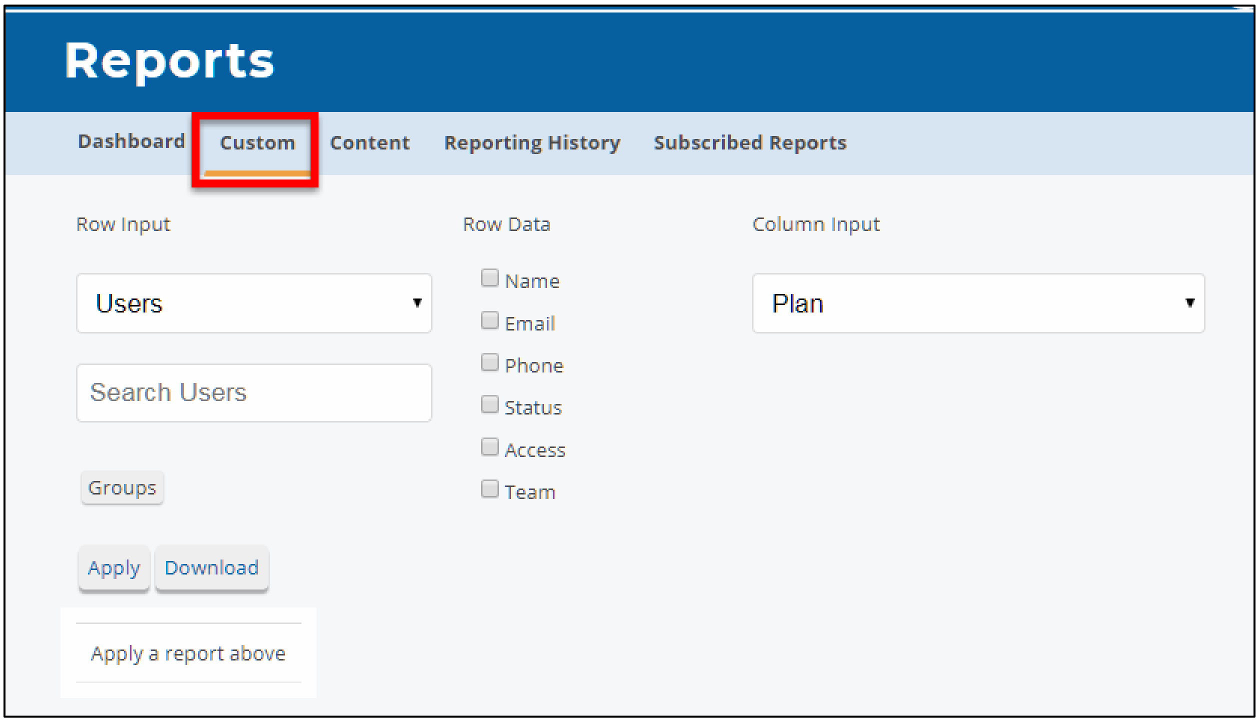
Selecting Teams Row Input – Column and Row Data Settings:



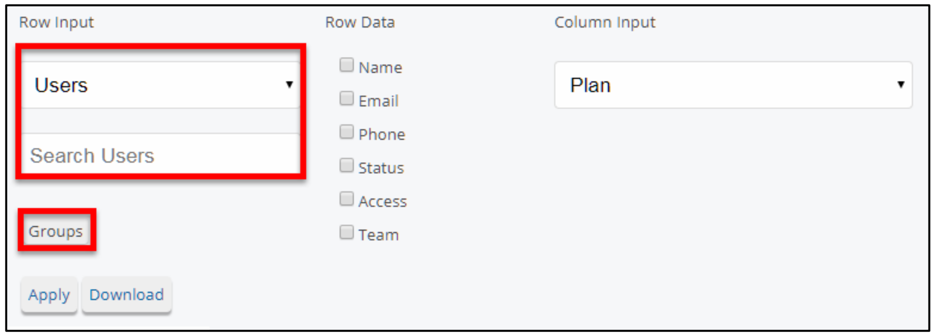
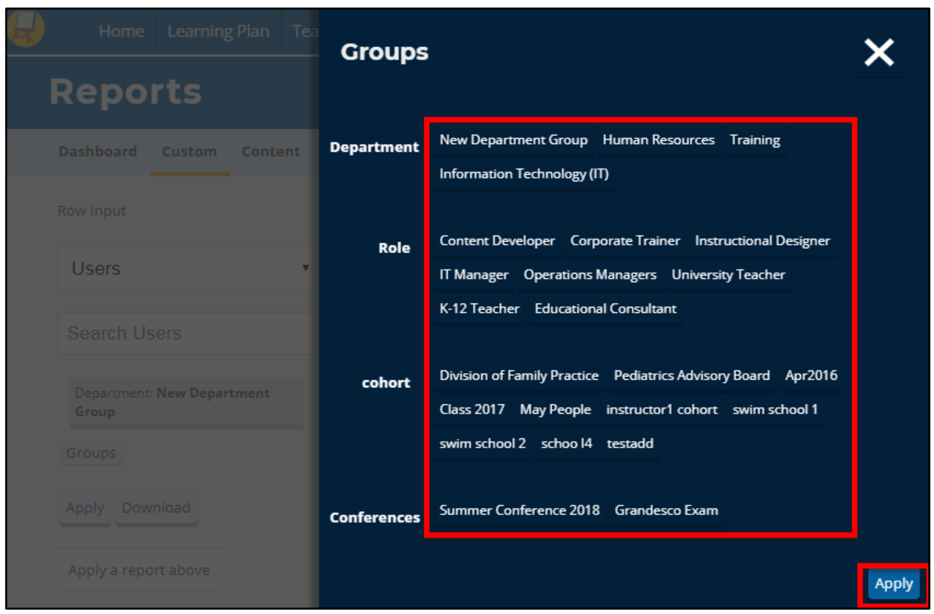
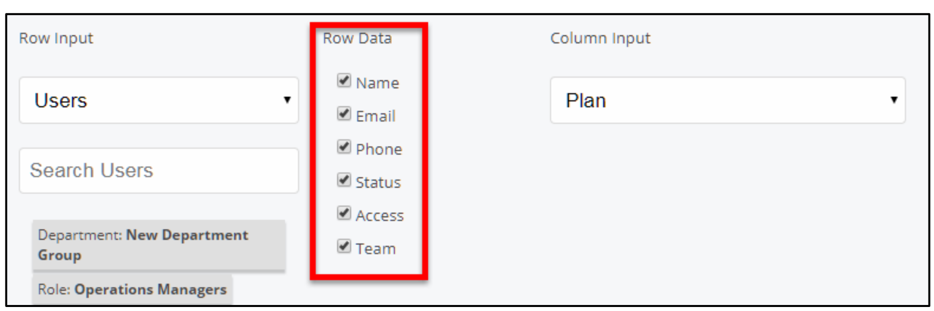
Column Input	Behaviour
Plan History	Reports on Learning Plan progression.
Course Progress	Reports on team course completion progress.
Course Scores	Reports on average team scores across a specific course.
Course Progress History	Reports on team progress over a selected period of time, for a specific course.
User Count History	Reports on number of users for each team selected, over time.
Search Teams	A search bar to search for a team and filter the results by a specific team (and would change the number of rows).
Row Data	Click on the corresponding row data checkmark box to include it with the row data: Title, Users, Date Created, Date Registered.
Add Course	This filters the resultant report data by a specific course (e.g. choosing 5 courses will add 5 columns).
Start Date / End Date	Enter a start and end date for the desired range of the report.

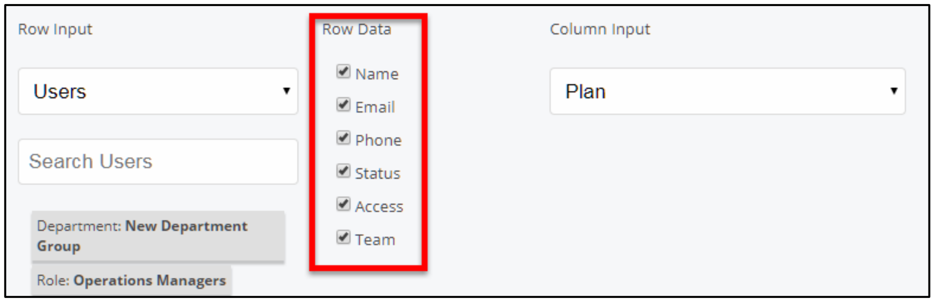
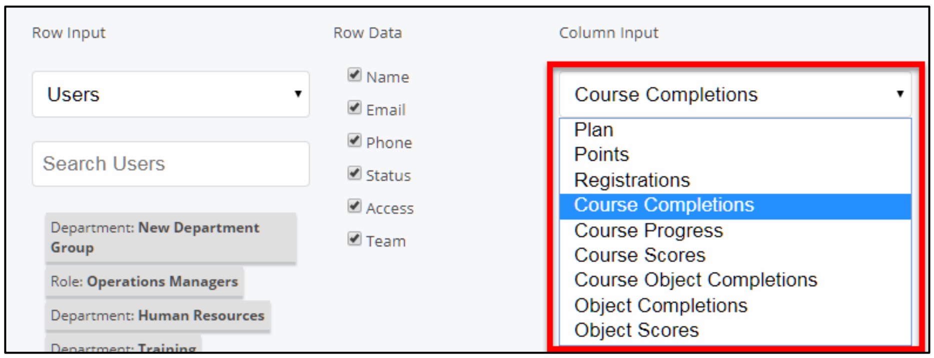
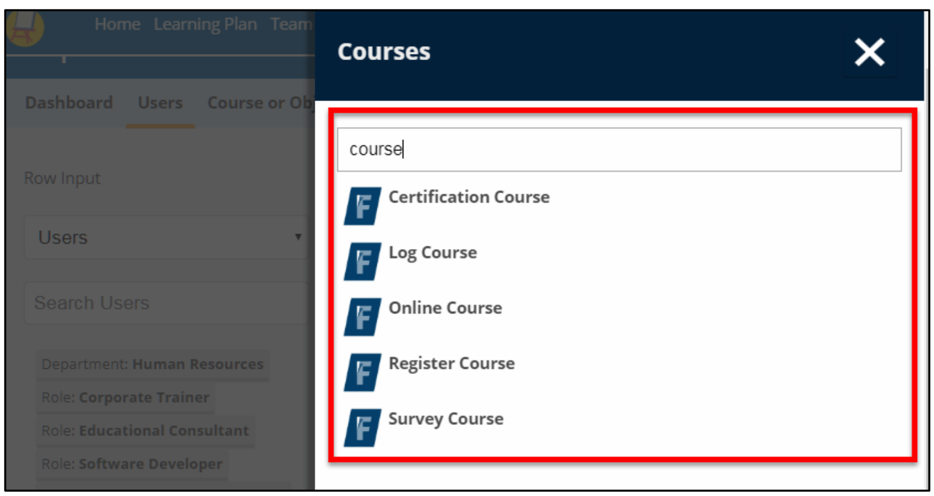
6.3 Running Custom Reports

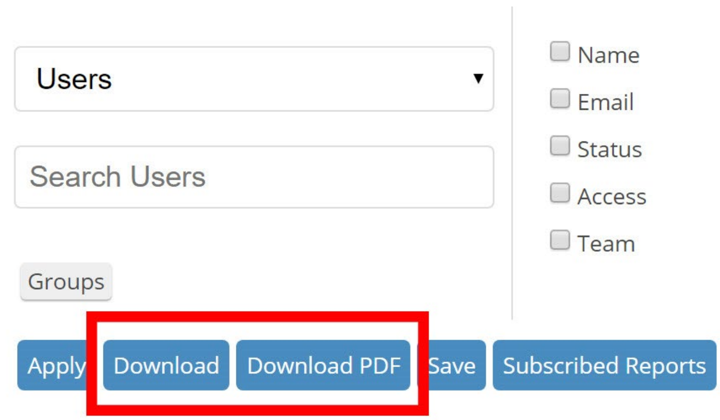
Description
Content reports allow you to report directly on courses, and objects, while filtering by users or teams. You can apply filters and see real-time data display on your report, or download to a CSV file. When running custom reports, clicking Apply will apply your selections, and automatically adjust the report results displayed.



6.3.1 Running User Custom Report

1. From the Reports page, on the Custom tab, select Users from the Row Input field. **2.** Enter the name of the user you want to report on in the Search Users field, and/or click the Groups button and select the groups of users to report on.	
3. If selecting Groups, click on the Group you want to report on. Repeat this process to add additional groups.	
4. Select the Row Data your wanted included on your report.	

5. Select the Row Data your wanted included on your report.	
6. Select the column input (what you want the row data to be reported against).	
7. Click the Add Course button and select the course you want to report on.	

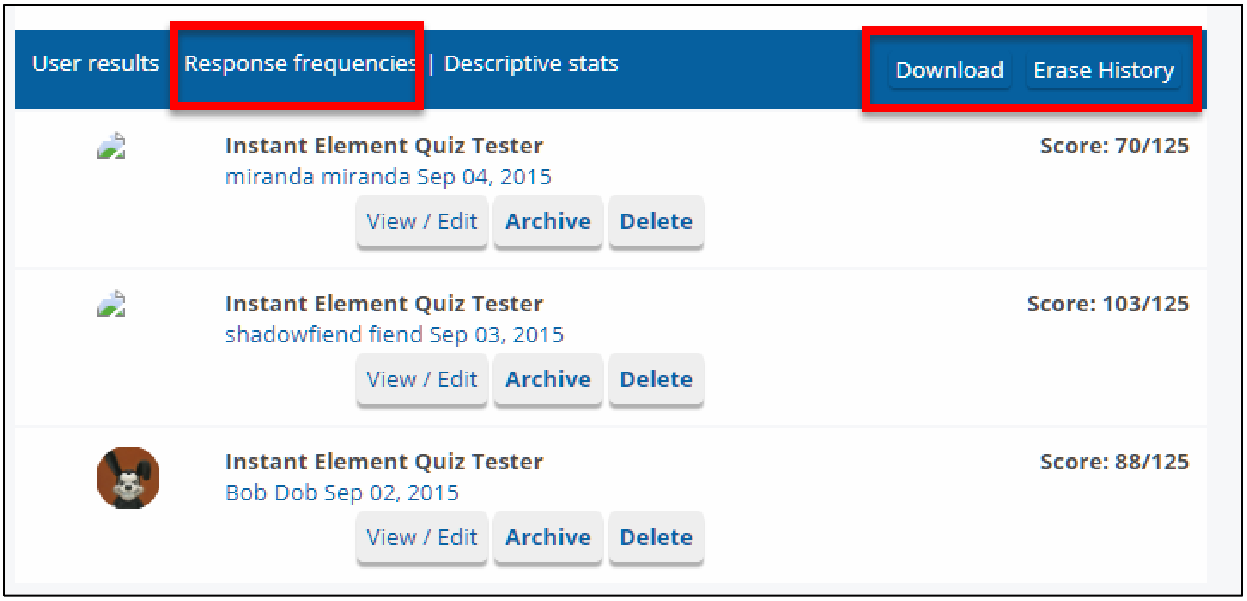
8. Click the Apply button to view the results, and download to download report results into a CSV file. You can also download reports as a PDF by clicking the	

6.4 Content Report Tab Settings (Content/Course/Object)

Description
Content reports allow you to report directly on courses, and object, while filtering by users. This is where you can view specific course and object data (e.g. answers to questions, interaction data, etc.)

Report Setting	Behaviour
Content	Select content to run report against.
Filter by Course/Object	Course view is different from Object view, providing stats differently than object view.
Users	Select user, or group to report on.
Filter By User	Click to select users/groups to filter the results for.
Descriptive Stats	Displays course progress and score. Meaningful for observing course progression, and validity/reliability over time. Provides snapshot data on course/object data (pass rate, accessed, passed, attempts, etc.) Good for determining question/quiz reliability and validity (too hard, too easy, bell curve, etc.)
User Results	Click to view every individual submission for the **object** that is selected. Provides details on the responses made by every user of the object (e.g. survey data, quiz responses, etc.). Results displays is PER USER, not per response – EG: The latest response by a user is displayed, not every response if they made multiple responses. You can view questions and evaluate them for validity and reliability.

User Results – Response Frequencies



Report Setting	Behaviour
View/Edit	Can view all responses from user, and demonstrates what the leaner saw and how they answered (even if the question was updated, you can see what the user saw and how they answered). EG: Safety quiz Reponses, as requested by auditor – demonstrates all responses.
Archive	Discounts it as an attempt, but saves it for referral purpose. (e.g. only 3 attempts to get best score, then user requests a 4th attempt – this is where the Admin could search for worst attempt, and archive it.)
Delete	Deletes the data. NOTE: Don't delete data, archive where-ever possible!
Erase History	Erases all completion history data for the object. This doesn't delete the submissions made by the user, but erases the completions for that object. EG. A recurring WHMIS safety course that requires re-completion, you can erase history and they will be required to take it again, but their previous completion data is still saved and reportable.
Filter by Course/Object	Course view is different from Object view, providing stats differently than object view.

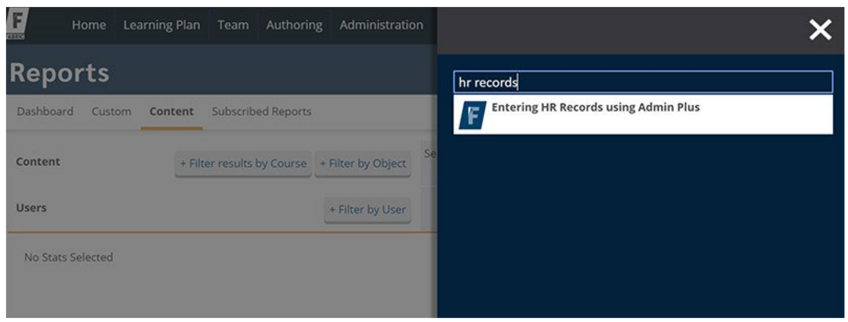
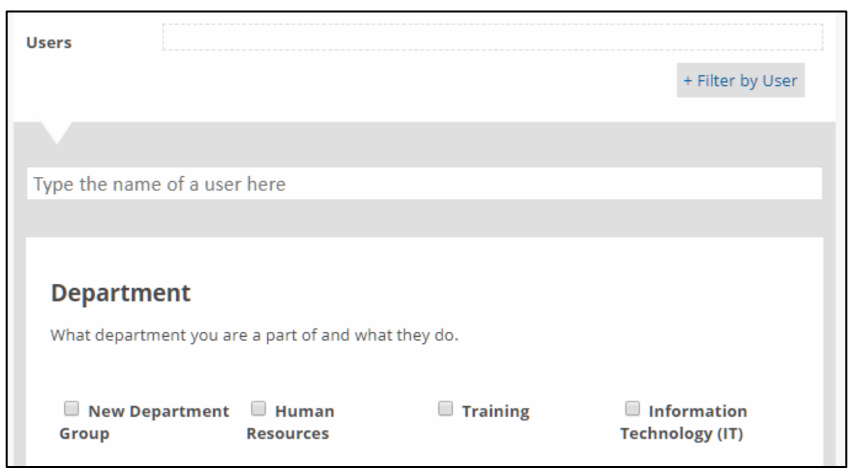
6.5 Running Content Reports

Description
When running content reports, the report views are different between a Filter Results By Course view, or Filter By Object.   Course reports include more general information on course completion and course stats, while object reports include detailed information on user interaction data (question answers, time to complete, etc.)

6.5.1 Running Content Report – Filter By Course (INC.)

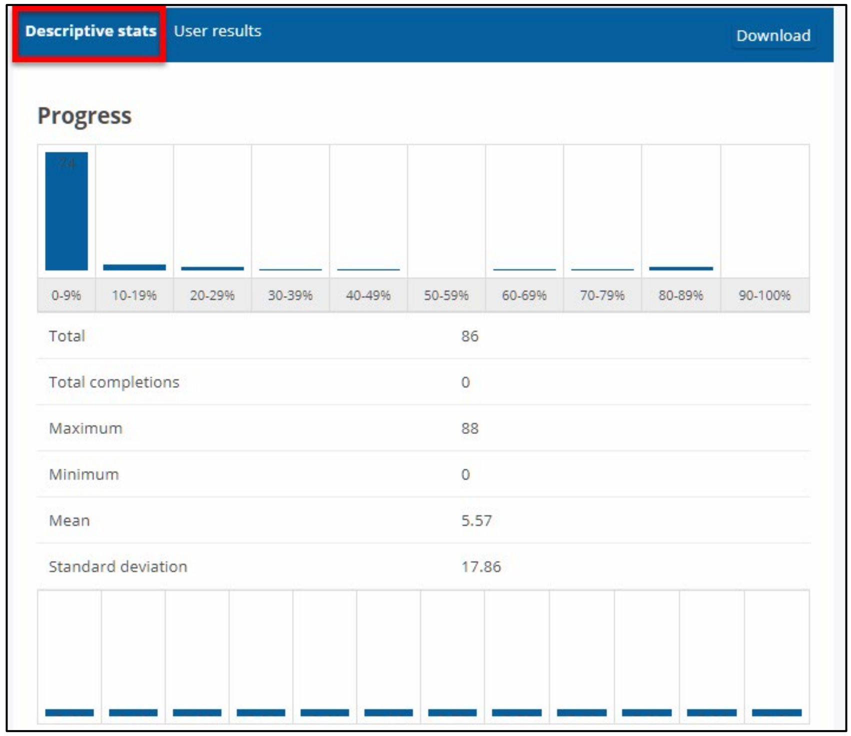
Removed reference to user search.

Will continue to use group.

1. From the Reports page, on the Content tab, click the 'filter results by course' button. **2.** Enter the name of the course.	
3. Click 'filter by user' to further refine the search results by user or groups. Enter the user name, or select the group(s) you want to report on. **4.** Scroll down and click Apply.	
5. As you add courses, and users to your report, the displayed data changes in real time.	

6.5.1.1 Descriptive Stats – Course Report View

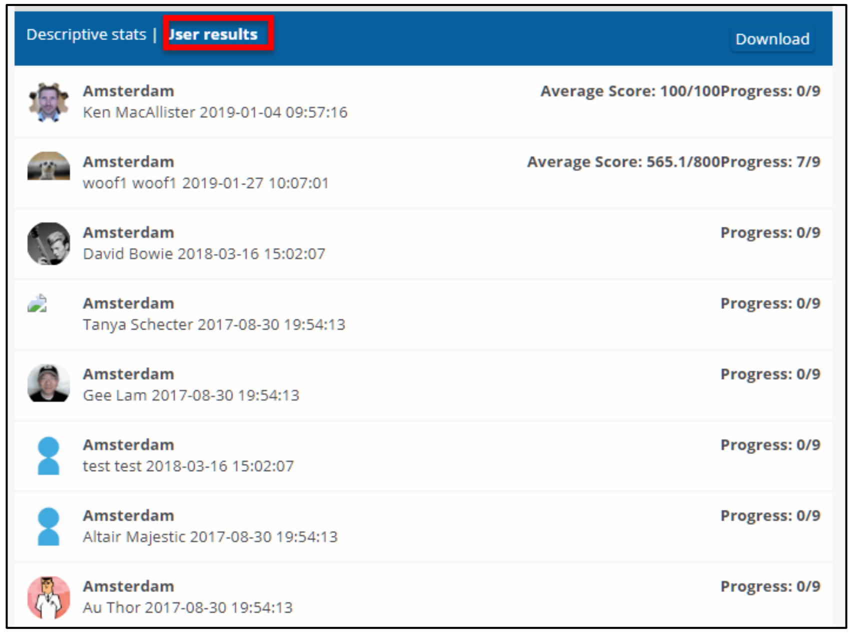
When you are reporting on a Course, you can select Descriptive Stats or User Results. For Descriptive Stats:

1. Click the Descriptive Stats button. Report results on the statistics of the course you are reporting on are displayed. This is where you can view general statistics on course progress and score, and view data that can identify how users are interacting with the course.	

6.5.1.2 User Results – Course Report View

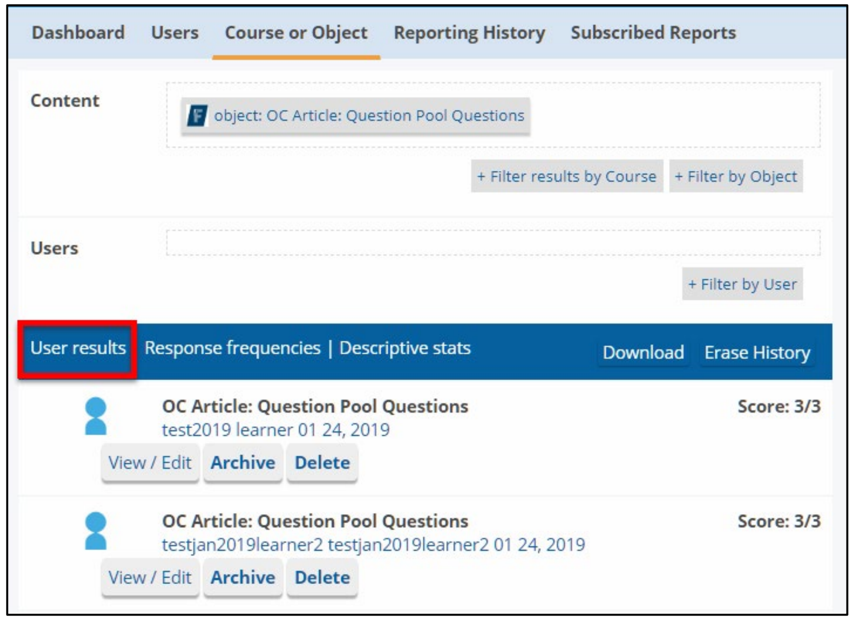
When you are reporting on a Course, you can select Descriptive Stats or User Results. For User Results Stats:

1. Click the user results button to view user progress on the course selected. For more detailed information (e.g. quiz results), run an Object report, and view User Results.

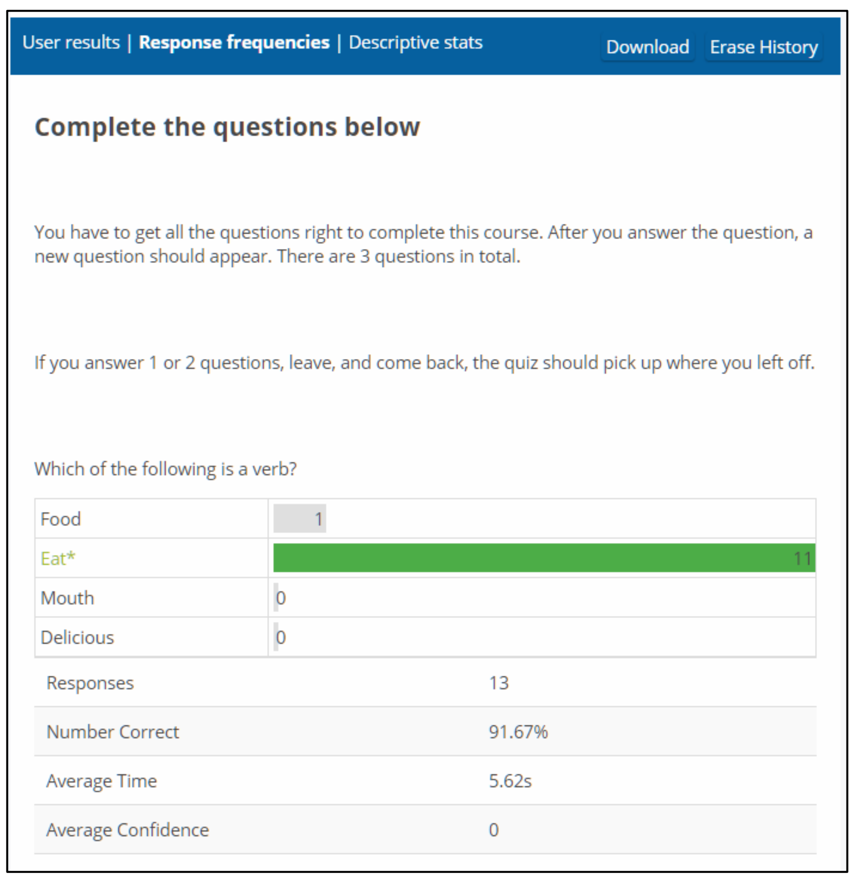


6.5.2 Running Content Report – Filter By Object (User Answers)

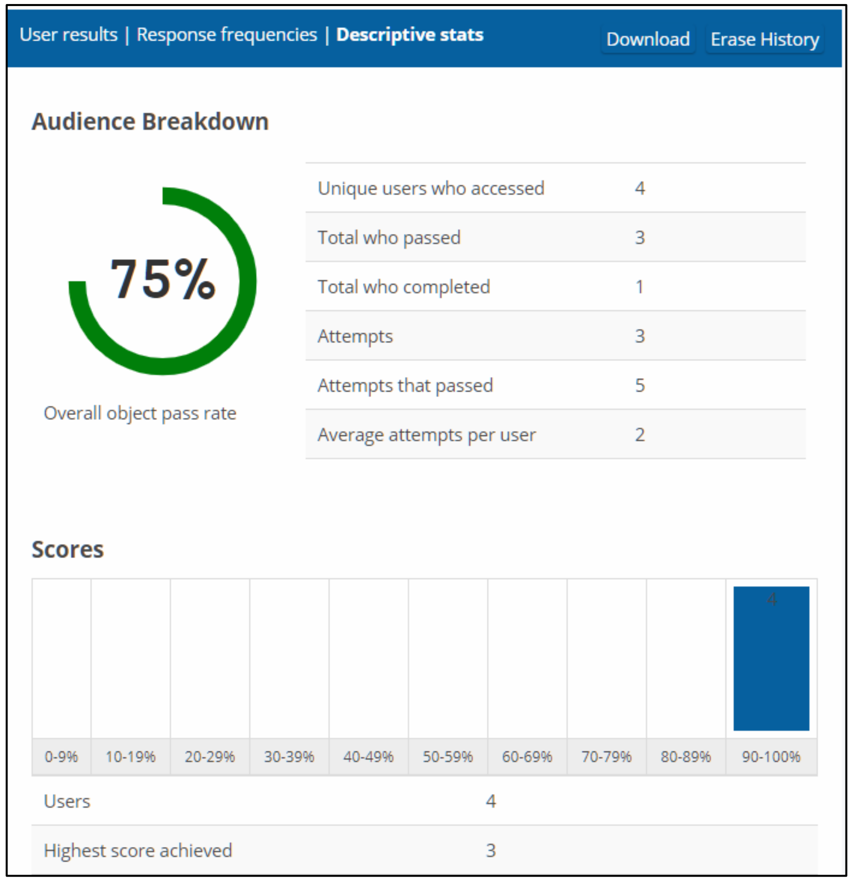
1. From the Reports page, on the Content tab, click the ‘filter results by object’.
2. Enter the name of the course object. User results are displayed by default.
3. From the User Results view, you can view, edit, archive or delete user response data.



4. From the Response Frequencies tab, you can view response stats on each question in the object.



5. From the descriptive stats view, you can view stats on user attempts, completion rates, times, and scores.



6.6 Reporting History

Description
Used to compare course\object completion against a Key Performance Indicator. You can log data in an object, and compare it to course completions for an indicator on how the course is affecting other areas of your company. This is custom functionality that may require custom development work. Please contact us for more information on using this function.

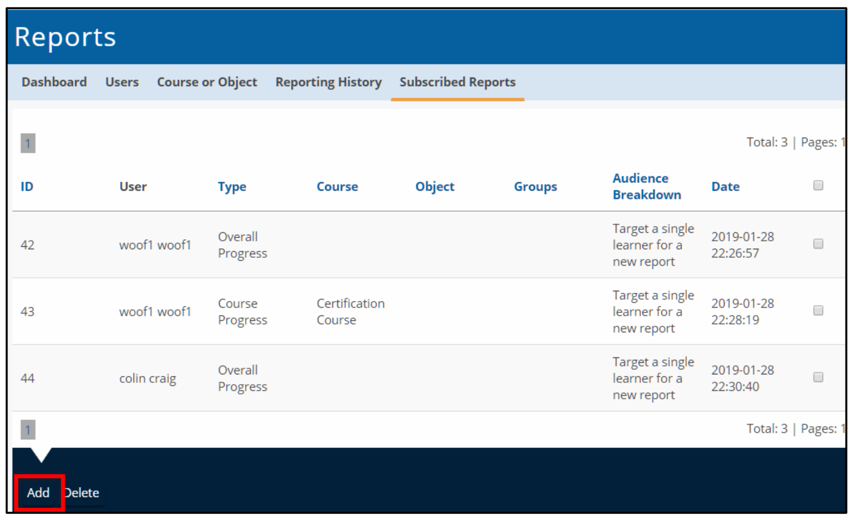
6.7 Subscribed Reports

Description
Subscribed reports are run and emailed out every Sunday night in a CSV. You can add subscribed reports that report on user information, course completion, or object completion. This is executed in the Manager → Team page, under Subscribed Reports.

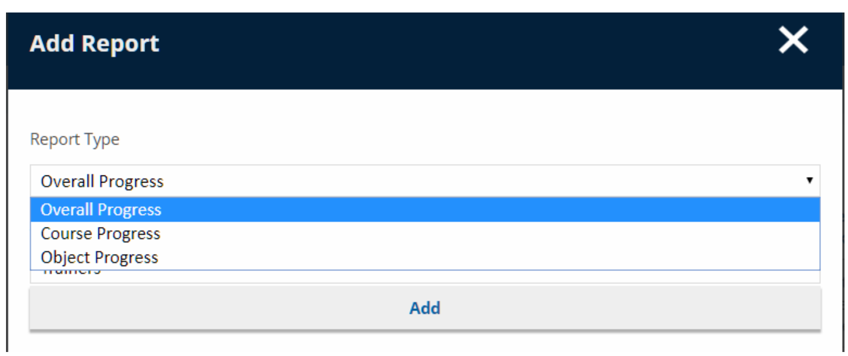
6.6.1 Adding a Subscribed Report

Description
Administrators create subscribed reports.

1. Click Add.



2. Select Report Type to add (Overall Progress, Course Progress, Object Progress).



3. Select audience (access level) for report, this will determine who can subscribe to this report.

6.6.2 Deleting a Subscribed Report

Description
Administrators create delete subscribed reports.

1. Select the report to delete, and click the Delete button.