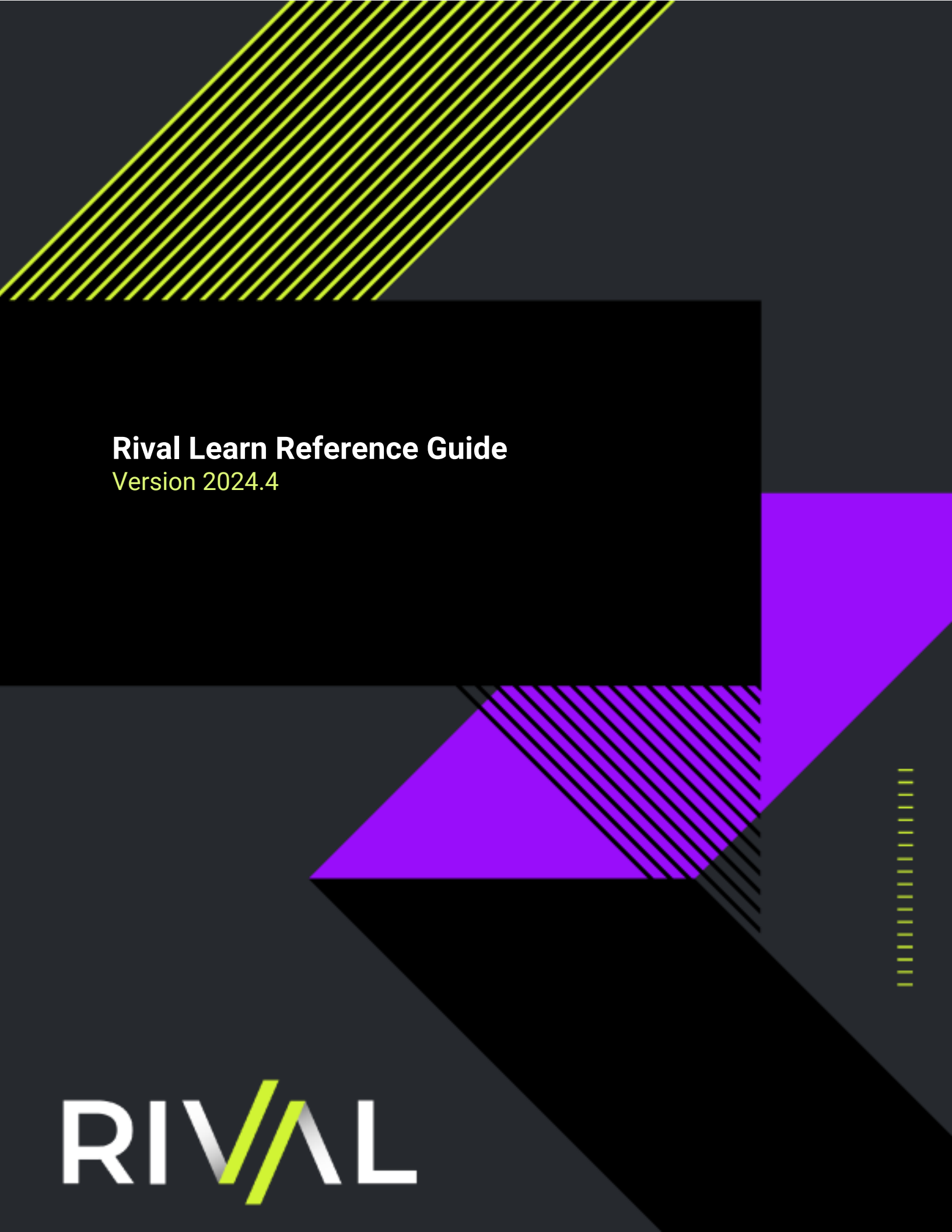




Rival Learn Reference Guide

Version 2024.4

RIVAL

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Introduction

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About online Help

Online Help describes Rival Learn features and provides step-by-step instructions on how to configure the system, create and deploy training content, and manage administrative tasks. Information is limited to configuring learning management and learning content management functions and does not cover system administration or implementation functions.

Rival Learn

Rival Learn is a comprehensive learning management system (LMS) that helps your company manage, track, and report on all your employees' learning activities. Rival Learn gives you unparalleled control over the development, deployment and management of a learning environment, from traditional instructor-led courses to e-learning or a blend of both.

Core and optional components

Rival Learn is available as a core application with optional components that can be licensed as add-ons.

Core application

- Rival Learn core application – LMS

The Rival Learn core application contains basic learning management and administration functions suitable for small to medium organizations that need to deploy and track "off-the-shelf" eLearning courseware and administer basic internal classroom training.

Included is the ability to manage mandatory training, competencies, and non-training requirements by dynamically generating unique Learning Journeys for users based on your organization's business rules.

The core application also allows scheduling of instructor-led classes, workshops, seminars, vendor-delivered courses and other training activities with full management of instructional resources such as instructors, equipment, classrooms, materials, and so on. Enrollment notifications provide automated enrollment notices. A virtual planning board allows administrators to view and resolve resource conflicts.

- Content management component – LCMS

The content management component offers e-content creation and learning object repository management. This combination is suited to organizations that want to extend off-the-shelf training with custom-created e-learning.

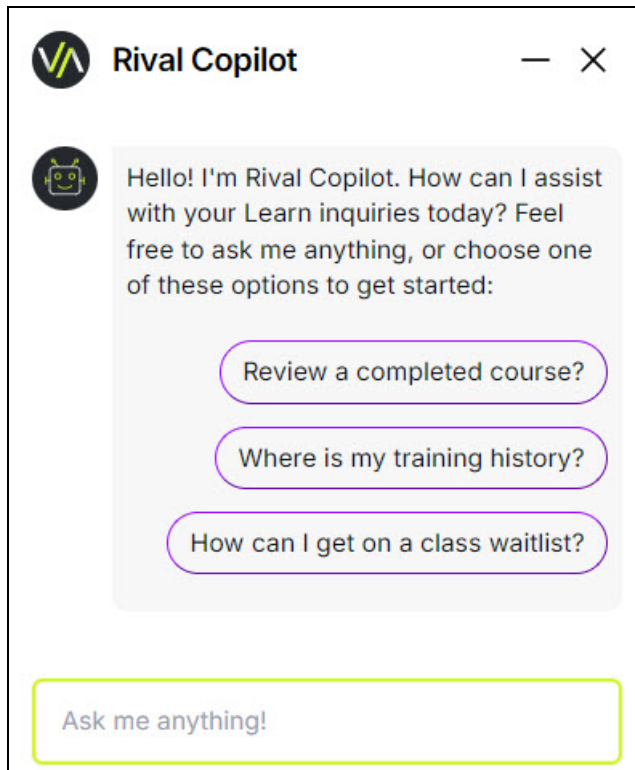
Optional components

- eBusiness Management Component

This component provides financial record management, sales, receipts and e-Commerce, suitable for organizations that wish to create a revenue stream from course or class offerings, with web-based student self-enrollment and eCommerce-enabled course catalogs.

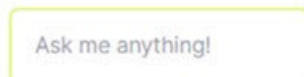
Rival Copilot

Rival Copilot is a generative AI based question-and-answering system. Ask questions to get fast access to Help content so you can quickly learn product concepts, tackle your daily how-to tasks, and get clarity on head-scratching roadblocks.



Ask Rival Copilot

1. At the bottom right corner of the page, click .
2. Select an existing question or enter your question in the *Ask me anything* box:



Rival Copilot searches the Help system to find an answer. If an answer is available, Rival Copilot displays it and includes a link to the source topic in the Help system.



Supported languages

You can find information about supported languages in the release notes. Release notes are available in the Rival Engagement Center: <https://engagementcenter.silkroad.com>.

Support

For technical assistance for any of our solutions, contact our client support staff at:

Email: support@rival-hr.com

Web: <https://www.rivalcommunity.com>

Student Portal

The Student Portal is a student's entry point into Rival Learn and all available content. Students use the portal to:

- View course offerings
- Register for and complete online courses
- Register for instructor-led courses (in-class courses)
- View and complete mandatory training and training activities

Supervisors are also students and can perform additional tasks:

- Register direct reports in in-class courses
- Assign online courses, competencies and assignments to direct reports
- Approve enrollments for direct reports
- Assess checklists for direct reports

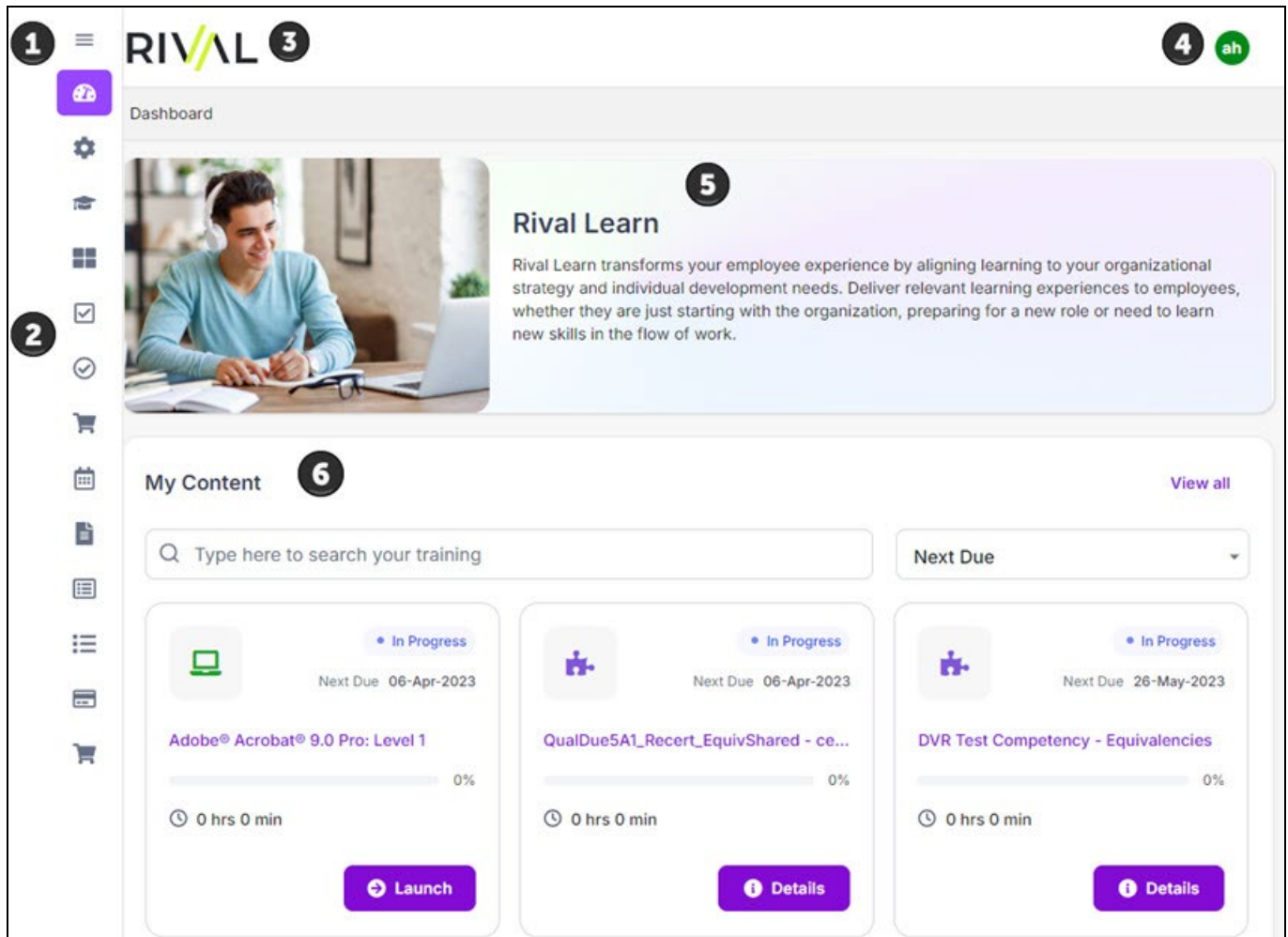
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Log in page

As a Rival Learn client, you get a customized Universal Resource Locator (URL) so that students can access your organization's Student Portal. Access requires a user name and password. You can configure your log in page to have custom branding options.

Student Portal user interface



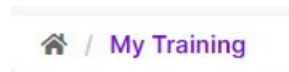
The Student Portal is a web-based software application, which means the user interface is made up of pages. Each page has a consistent look and similar navigational features. Each page is responsive, which provides an optimal viewing and interaction experience across a range of devices (mobile, laptop, and desktop). Review the main areas of the Student Portal below.

	Name	Description
1	Hamburger menu	Toggle to expand or collapse the navigation bar. When collapsed, only icons are shown not text labels.
2	Navigation bar	Contains menu options to access pages to perform actions.
3	Header	Displays the Rival logo or a custom logo (if your administrator uploaded one). Tip: Click the logo on any Student Portal page to return to the dashboard.
4	User avatar	Avatar of the logged-in user's initials. If employee has a special character as first letter of first or last name, a generic image icon  is shown. Tip: Click the thumbnail to see options to view/update your profile or log out.

	Name	Description
5	Banner	(If enabled) Shows the name of your organization and text welcoming students to engage with content. The banner only appears on the dashboard. Note: Your system administrator can customize the title and text that appear here. Logo cannot be customized.
6	Content	Shows the training content assigned to the student.
Not shown in graphic	Learning Journeys	Shows a student's Learning Journeys.
Not shown in graphic	Popular Content	Shows the top 5 popular content to give a student a jumpstart on exploring learning content and finding content they might like to take.

Breadcrumbs

With the exception of the dashboard, all other Student Portal pages have breadcrumbs:



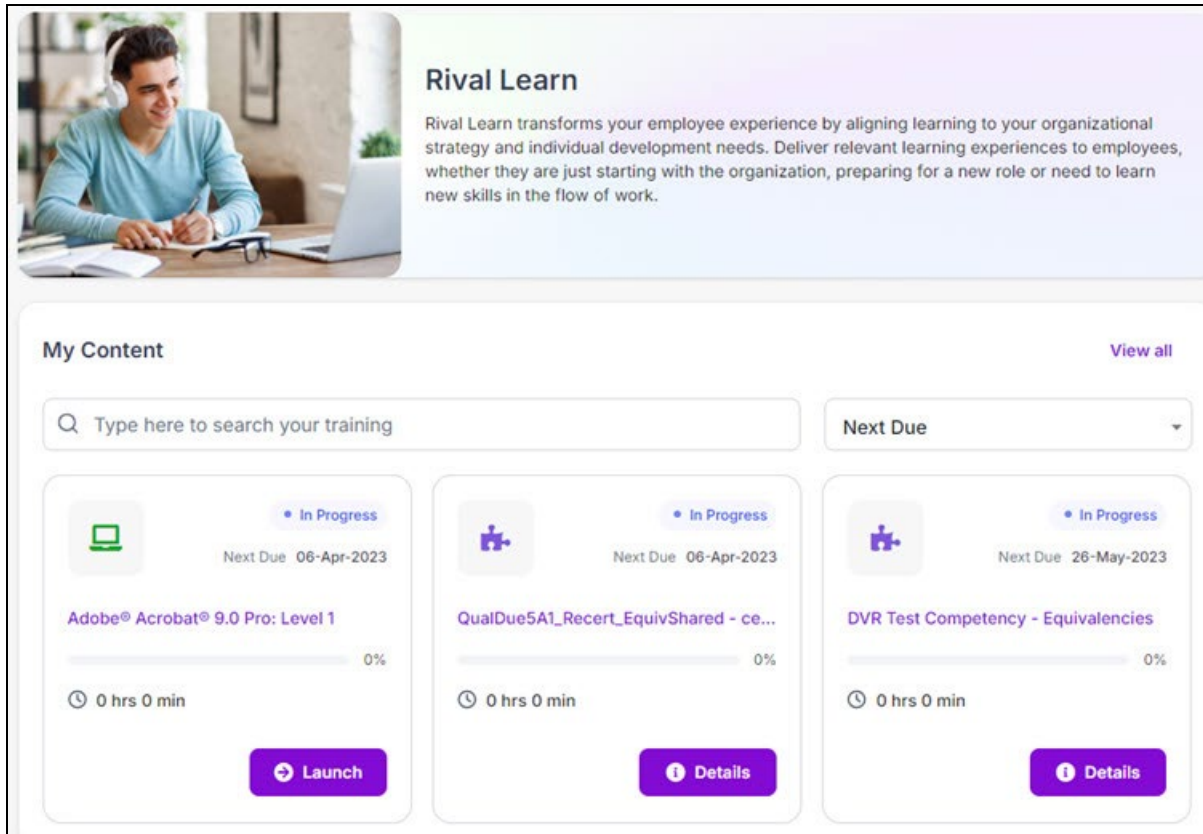
Breadcrumbs serve as a navigational aid so you can keep track of your location and maneuver easily.

Sorting

Data grids can be sorted by any column. Click a column heading to toggle the sort order between ascending and descending.

◆	◆ Name	◆ Status	◆ Start Date	◆ Last Accessed
	Adobe® Acrobat® 9.0 Pro: Level 1	In Progress	23-Jun-2023	13-Jun-2024
	QualDue5A1_Recert_EquivShared	In Progress	21-May-2024	27-May-2024
	DVR Test Competency - Equivalencies	In Progress	25-Jan-2023	01-Feb-2023
	Writing for a Global Audience (Includes Simulation)	In Progress	08-Jan-2023	23-May-2024

Dashboard



Rival Learn

Rival Learn transforms your employee experience by aligning learning to your organizational strategy and individual development needs. Deliver relevant learning experiences to employees, whether they are just starting with the organization, preparing for a new role or need to learn new skills in the flow of work.

My Content [View all](#)

Q Type here to search your training

Next Due

Course Name	Status	Next Due	Progress	Time	Action
Adobe® Acrobat® 9.0 Pro: Level 1	In Progress	06-Apr-2023	0%	0 hrs 0 min	Launch
QualDue5A1_Recert_EquivShared - ce...	In Progress	06-Apr-2023	0%	0 hrs 0 min	Details
DVR Test Competency - Equivalencies	In Progress	26-May-2023	0%	0 hrs 0 min	Details

The dashboard is the first page you see after logging in. It shows the content (training) assigned to you. Use this page to view and launch training.

If you have no training assigned and the Course Catalog is available, the Go To Catalog button appears instead. Click to open the Course Catalog to select training.

Buttons, links, and options

Type text to search for specific training. As you type, results appear in the panel.

Select how to display training on this page. Options are by Next Due, Status, or Last Accessed.

Note: The view order remains set, even after you leave this page or log off, until you change it.

Go to Catalog

Displays the Course Catalog so you can search for and select training content.

Note: You only see this button if you have no training to complete.

Launch

Launches the training content.

Opens your My Training page and shows all your active training.

Popular Content

Shows training content that's getting a lot of attention.

View your training that is due next

1. From the Student Portal navigation bar, click **Dashboard**.

The **dashboard** (page 14) opens and the filter defaults to *Next Due*.

The three most relevant training content items are shown.

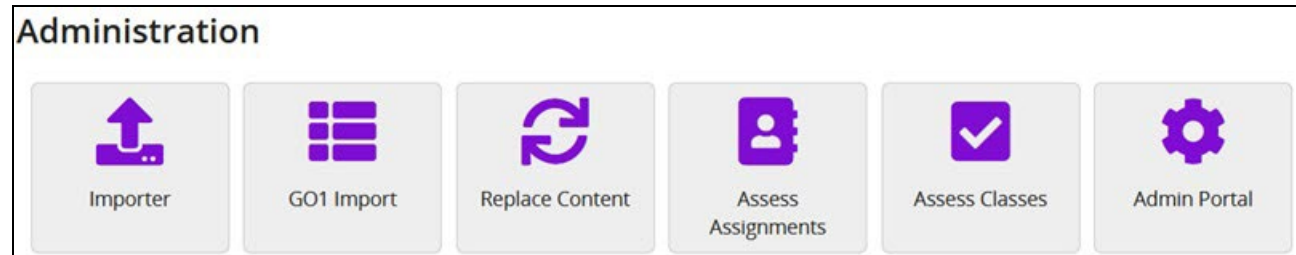
View all your active training from dashboard

1. From the Student Portal navigation bar, click **Dashboard**.

The **dashboard** (page 14) opens.

2. Click **View All**.

Administration



Some administration tasks are now available from the Student Portal. Administrators can click a tile to access a admin task.

Tile	Description
Importer	Import user and user course data into Rival Learn.
Go1 Import	Import courses directly from the Go1 Course catalog into a Rival Learn course catalog.
Replace Content	Replace native content object in an eCourse.
Assess Assignments	Assess assignments for students.
Assess Classes	Assess classes for students.
Admin Portal	Access the Admin Portal.

Importer

The Importer is an easy-to-use utility that lets administrators import user and user course data into Rival Learn. The Importer supports importing the following data:

- Assignments
- Competencies
- eCourses
- Exams

- Requirements
- Training activities
- Users

The Importer shows a listing of all imports. At a glance, administrators can identify when the import occurred, status (in-configuration or completed), when the import was scheduled, and number of errors (if any). Administrators also use this page to:

- Upload an import file
- View details about import files
- Manage saved mapping configurations

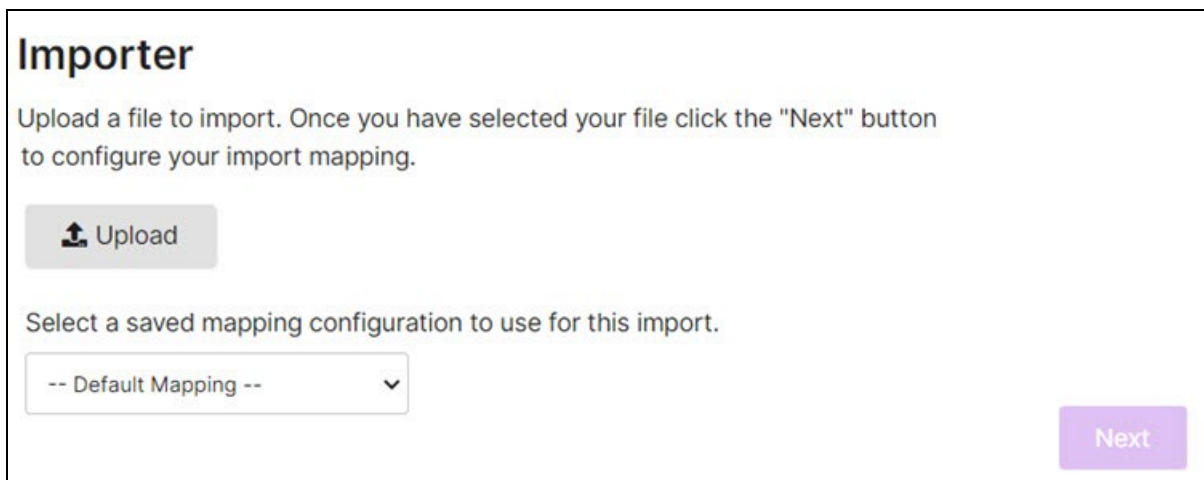
Import data into Rival Learn

1. From the Student Portal from the navigation bar, click **Administration**. Click **Importer**.
Or
From the Administration Portal, click **Enterprise>Configuration>HR Imports**. Click **Importer**. Click **Launch Importer**.

The Importer page opens.

2. Click .

The Importer Upload page opens:



The screenshot shows the 'Importer' page. At the top, it says 'Importer'. Below that, a message reads: 'Upload a file to import. Once you have selected your file click the "Next" button to configure your import mapping.' There is a grey button with an upload icon and the text 'Upload'. Below this, it says 'Select a saved mapping configuration to use for this import.' There is a dropdown menu showing '-- Default Mapping --' with a downward arrow. In the bottom right corner, there is a purple button labeled 'Next'.

3. Click **Upload**.
4. On the File Upload pop-up, select a file and click **Open**.

Do one of the following:

- If this is the first import or you do not have a saved mapping configuration, leave the **Default Mapping** option selected.
- If you want to reuse a saved mapping configuration for this import, select it from the drop-down.

5. Click **Next**.

The Configure Import Mapping page opens:

Configure Import Mapping

Validate

Schedule

Import File

User_1_test.csv

Import Type

User

Field Delimiter

Comma

Date Format

dd-MMM-yyyy h:mm a

☒ File Includes Column Headers

Field Mapping

Column	System Field	Row 1	Row 2	Row 3
1		First Name	Bobbi	Lawrence
2		Last Name	Cramer	Armani
3		Emp.ID	9999	8888
4		Login.code	bcramer	larmani

6. From the Import Type drop-down, select an import type:

- User
- Training Activity
- eCourse
- Exam
- Assignment
- Competency
- Requirement

Tip: The type you choose controls the system fields you can map to.

7. From the **Field Delimiter** drop-down, select the delimiter for the file.
8. If the import file contains column headings, leave the **File Includes Column Headers** check box selected. Otherwise, uncheck it.
9. Map the fields in the file to system fields. (If you want the system to ignore a field, select **Ignore Column**.)

Tip: If this is a common import, save the import mapping for future use. Click  and click **Save**. Give it a name and click **Save**.

10. Click **Validate**.

If there are problems with field mappings, a warning icon appears in those fields. Correct them and re-click **Validate**.

After a file is validated, you can click **Preview** to see what it will look like.

11. If you are satisfied the file is ready to import, click **Schedule**.

Preview an import

- When configuring an import file, you can preview the data before you schedule it for import.
- You must validate the import before you can preview it.

1. On the Configure Import Mapping page, click  and then click **Preview**.

The Preview page displays the data in a grid with rows and columns.

2. Click  and then click **Back to Configure Input Mapping**.

View details about imports

- From the Student Portal from the navigation bar, click **Administration**. Click **Importer**.
Or
From the Administration Portal, click **Enterprise**. Under the Configuration section, click **HR Imports**. Click **Importer**. Click **Launch Importer**.

The Importer page opens.

Importer

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🔍

Search by file name

File Name	Status	Modified	Scheduled	Errors
sample data.csv	 In Configuration	17-Nov-2022	--	
Colsa Test file.csv	 In Configuration	03-Mar-2022	--	
Colsa Test file.csv	 Completed	03-Mar-2022	03-Mar-2022	0
Colsa Test file.csv	 Completed	03-Mar-2022	03-Mar-2022	0
userimporttest.csv	 Completed	08-Feb-2022	08-Feb-2022	0

1 - 10 / 65

⏪

<

1

2

3

4

5

>

⏩

items / page

10

20

40

2. For the import you want to view, click its link in the File Name column.

If the import has a:

- Completed status, import results are shown, including who uploaded the import, date scheduled, date started, date completed, and number of errors and warnings.
- In configuration status, the Configure Import Mapping page opens. You can continue the mapping process, validate, and schedule the import.

View an import log

- You can view an import log for imports with a Completed status.
 - An import log shows date and time import was processed along with the number of records processed, updated, or skipped.
1. From the Importer page, click a file link in the File Name column.

The Importer Results page opens.

2. Click  and then click **View Import Log**.

Create a mapping from a previous mapping file

- If you saved mapping files from previous versions of the Importer tool to your computer, you can upload them into the new Importer.
 - Once uploaded, the mapping files can be used for imports in the new Importer.
1. From the Importer page, click  and then click **Manage Saved Mapping Configurations**.
 2. From the Saved Mapping Configurations page, click  and then click **Create Mapping From File**.
 3. On the Create Mapping From File pop-up, click **Upload**.
 4. On the File Upload pop-up, locate the mapping file and click **Open**.
 5. Click **Restore**.

Go1 Import

Rival Learn clients who license course content from Go1 can now import courses directly from the Go1 Course Catalog to a Rival Learn course catalog.

Import Go1 courses into Rival Learn

- Importing Go1 courses requires that you have licensed Go1 content, **Go1 integration setup** (see "**Perform Go1 integration setup**" on page 366) is complete, and you are an admin user in a **workgroup** (see "**Set privileges for a workgroup**" on page 288) with the Go1 Course Import privilege.
1. From the Student Portal navigation bar, click **Administration**.
 2. Click **GO1 Import**.

The Go1 Course Catalog (Content Hub) opens.

3. Find the courses you want by:
 - Entering keywords to search by
 - Using filters to narrow your search
 - Scrolling through the Content Hub library

Tip: To preview a course, click its description.

4. To select a course, check its check box.

5. Repeat step 3 for each course you want to select.
6. Click **Add selection to** and then select **My Library**.

The course or courses you selected are uploaded to your My Library.

7. Click the My Library tab to view the current courses in your library.
8. Click **Import to Learning**.

The Import Go1 Courses to Learning page opens.

9. Select an existing course catalog or define a new one to import the course(s) into.
10. Set options and assign course categories and content object categories. Note that:
 - The Set Catalog Status Active option is checked by default.
 - Any Go1 categories will automatically be created or associated to each imported course and applied to the Catalog Item, Course and/or Content Object.
 - The Content Object Status defaults to Library.
11. Click **Begin Import**.

After a successful import, the Go1 courses are available in the course catalog selected in step 8.

Assess Classes (for administrators)

When privileged admin users access this tile, they can:

- **Search for classes** (see "**Search for classes to assess (Student Portal)**" on page 20)
- **Assess classes** (see "**Assess a class (Student Portal)**" on page 21)
- **Enroll students in a class** (see "**Enroll a student in a class (Student Portal)**" on page 22)
- **Cancel student enrollment in a class** (see "**Cancel a student's enrollment in a class (Student Portal)**" on page 21)
- **Edit (set) class status** (see "**Edit (set) class status (Student Portal)**" on page 22)

Tip: A privilege admin user is a user who has View, Add, Edit, and Delete access for the Assess Training Events privilege in Security Settings.

Search for classes to assess (Student Portal)

- The default search returns all classes with a start date scheduled for the last 30 days but you can click  to change this and other search criteria.
- The search criteria remains in effect until you click **Clear all filters**.

1. From the Student Portal navigation bar, click **Administration**.
2. Click **Assess Classes**.

The Assess Classes Search page opens.

3. Find the class you want to assess by:
 - Entering class name
 - Using filters to narrow your search

Assess a class (Student Portal)

- Assessing a class typically means entering attendance, marks, and mastery date for students who attended.
 - Any student who is marked with No Show attendance is automatically assessed with an Incomplete and no Mastery Date is allowed.
1. From the Student Portal navigation bar, click **Administration**.
 2. Click **Assess Classes**.
The Assess Classes Search page opens.
 3. **Search** (see "**Search for classes to assess (Student Portal)**" on page 20) to find the class you want.
Classes that meet the search criteria appear as tiles (bottom of page).
 4. For the class you want to assess, click **Assess**.
The Class Details page opens.
 5. To assess:
 - An individual student, click ☐ and select **Assess**.
 - Multiple students, click the check box beside their names. Click ☐ (top of column) and select **Assess Selected**.
 - All students, click the check box (top of column). Click ☐ (top of column) and select **Assess Selected**.
 6. From the Assess Class dialog box, select **No Show** or **Attended**.
- Note:** If the student attended class, select the Mark they earned and the Mastery Date.
7. Click **Save**.

Cancel a student's enrollment in a class (Student Portal)

1. From the Student Portal navigation bar, click **Administration**.
2. Click **Assess Classes**.
The Assess Classes Search page opens.
3. **Search** (see "**Search for classes to assess (Student Portal)**" on page 20) to find the class you want.
Classes that meet the search criteria appear as tiles (bottom of page).
4. For the class you want, click **Assess**.
The Class Details page opens.
5. To cancel enrollment for:
 - An individual student, click ☐ and select **Cancel**.
 - Multiple students, click the check box beside their names. Click ☐ (top of column) and select **Cancel Selected**.
 - All students, click the check box (top of column). Click ☐ (top of column) and select **Cancel Selected**.

6. From the Cancel Enrollment dialog box, click **Remove**.
7. Click **Save**.

Enroll a student in a class (Student Portal)

1. From the Student Portal navigation bar, click **Administration**.
2. Click **Assess Classes**.

The Assess Classes Search page opens.

3. **Search** (see "**Search for classes to assess (Student Portal)**" on page 20) to find the class you want.
Classes that meet the search criteria appear as tiles (bottom of page).

4. For the class you want, click **Assess**.

The Class Details page opens.

5. Click **Enroll Users**.
6. From the Add Enrollment dialog box, search for a student.
7. In the list, click the student you want to enroll.
8. Click **Save**.

Edit (set) class status (Student Portal)

Tip: A class is also called a training event in Rival Learn.

1. From the Student Portal navigation bar, click **Administration**.
2. Click **Assess Classes**.
The Assess Classes Search page opens.
3. **Search** (see "**Search for classes to assess (Student Portal)**" on page 20) to find the class you want.
Classes that meet the search criteria appear as tiles (bottom of page).
4. For the class you want, click **Assess**.
The Class Details page opens.
5. Click **Edit Class Status**.
6. From the dialog box, select a status.
7. Click **Save**.

Assess Assignments (for administrators)

When privileged admin users access this tile, they can:

- **Search for assignments** (see "**Search for assignments to assess (Student Portal)**" on page 23)
- **Assess an assignment** (see "**Assess an assignment (Student Portal)**" on page 23)
- **Add an assignment record to assess** (on page 23)
- **Edit an assess assignment record** (on page 23)
- **Delete an assess assignment record** (on page 24)

Tip: A privilege admin user is a user who has View, Add, Edit, and Delete access for the Assess Assignments privilege in Security Settings.

Search for assignments to assess (Student Portal)

- The default search returns the first 10 assignments in ascending order by assignment name but you can click  to change this and other search criteria.
 - The search criteria remains in effect until you click **Clear all filters**.
1. From the Student Portal navigation bar, click **Administration**.
 2. Click **Assess Assignments**.

The Assess Assignments page opens.

3. Enter search criteria to find the assignments you want to assess.

Assess an assignment (Student Portal)

1. From the Student Portal navigation bar, click **Administration**.
2. Click **Assess Assignments**.

The Assess Assignments page opens.

3. **Search** (see "**Search for assignments to assess (Student Portal)**" on page 23) to find the assignment you want.
4. For the assignment you want to assess, click the assignment link in the Assignment column.

The Assignment Details page opens.

5. Complete the fields on the page.
6. Click **Save**.

Add an assignment record to assess

1. From the Student Portal navigation bar, click **Administration**.
2. Click **Assess Assignments**.

The Assess Assignments page opens.

3. Click .
4. Select a student.
5. Filter by type.
6. In the Assignment list, select the assignment to be assessed.
7. Click **Add**.

The assignment is added to the Assess Assignment page. You can now **assess** (see "**Assess an assignment (Student Portal)**" on page 23) it.

Edit an assess assignment record

1. From the Student Portal navigation bar, click **Administration**.
2. Click **Assess Assignments**.

The Assess Assignments page opens.

3. For the record you want to edit, click  and click **Edit**.
4. Make changes.
5. Click **Save**.

Delete an assess assignment record

1. From the Student Portal navigation bar, click **Administration**.
2. Click **Assess Assignments**.

The Assess Assignments page opens.

3. For the record you want to delete, click  and click **Delete**.
4. On the confirmation pop-up, click **Delete**.

Replace native content object in an eCourse (Student portal)

1. From the Student Portal navigation bar, click **Administration**.
2. Click **Replace Content**.

The Replace Content page opens.

3. From the **Import Type** drop-down box, select **SCORM**.
4. Leave the **Use Recommended Import Settings** check box selected.
5. In the SCORM Package File section, click **Add Files** and then browse for SCORM file to upload.
6. From the SCORM eCourse to REPLACE field, search for and select the SCORM eCourse to replace.
7. Edit the reference and version name associated with the eCourse and new native content object.

Note: The original eCourse Name and the ImportDate fields are read-only and cannot be modified.

8. Click **Begin Import Replacement**.
9. A summary screen appears notifying you about the successful import replacement or an error if the replacement is not successful.

Toggle and open the Administration Portal

- If you are an administrator, you can toggle and open the Administration Portal.
1. From the Student Portal navigation bar, click **Administration**.
 2. Click **Admin Portal**.

The Administrator Portal opens.

My Training

My Training

Active

History

All

Q

Type here to search your training

	Name	Status	Start Date	Last Accessed	Next Due	
	Adobe® Acrobat® 9.0 Pro: Level 1	In Progress	23-Jun-2023	13-Jun-2024	06-Apr-2023	▼
	Writing for a Global Audience	In Progress	08-Jan-2023	23-May-2024	26-May-2023	▼
	XML: An Introduction (Fourth Edition)	In Progress	08-Jan-2023	26-Jan-2023	26-May-2023	▼

+

Add a Training Record

My Training page shows all your training in one place. View your active, mandatory, and historical training records here. You can also:

- Search for specific training
- Launch and complete online courses
- Enroll in in-class courses pushed to you by your supervisor
- Cancel enrollment in in-class courses

You can identify the type of training by its icon:

This icon:	Represents:
	Assignment
	Online course
	In-class course
	Competency

When you access this page for the first time, the Active tab is selected by default and active training appears in the data grid. Click other tabs to see historical records or active and historical training records combined.

Buttons, links, and options

Type here to search your training

Q

Filters the data in the grid based on what you type in the box.

Active

History

All

Click a tab to view training information.

- **Active:** Shows in-progress (active), scheduled, and upcoming online courses and training.
- **History:** Shows completed, expired, and canceled training.
- **All:** Shows all training from the Active and History tabs combined.

Note: The selected tab remains the default as you leave this page or log out until you change it.



(Sort)

Click a column heading to toggle the sort order (ascending/descending). You can set a different sort order on each of tab (Active, History, All). The sort order persists as you move from tab to tab or log out until you change it.

Name column link

Click a link in the Name column to open the **Training Details page** (on page 28). From there you can view details about the in-class course or online course and perform various actions.



(Actions)

Click to perform an action. Actions vary based on the training type and whether training is active or historical. Potential actions:

- **Launch:** Launches an online course or assignment.
- **Remove:** Removes a self-registered course from the Training page.
- **Details:** Navigates to the Training Details page.
- **Prerequisites:** Navigates to the Prerequisite section on Training Details page.
- **Schedule:** Navigates to the In-Class Courses section on Training Details page.

 **Add a Training Record**

Click to add a training record to your training history.

View your active training

1. From the Student Portal navigation bar, click **My Training**.

My Training page (page 25) opens.

2. Click the Active tab.

All active training is displayed.

View your training history

1. From the Student Portal navigation bar, click **My Training**.

My Training page (page 25) opens.

2. Click the History tab.

All history training is displayed. This includes completed, expired, and canceled training.

View both active and history training

1. From the Student Portal navigation bar, click **My Training**.

My Training page (page 25) opens.

2. Click the All tab.

Active and history training are displayed.

View your training history report

1. From the Student Portal navigation bar, click **My Training**.

My Training page (page 25) opens.

2. Click the History or All tab.
3. Click **History Report**.

Add a training record to your training history

- If you complete training outside of Rival Learn, you can keep a record of it by adding to your training history.
- Examples of outside training may include attending a seminar or webinar, reading books, taking classes, and so on.
- You can upload a document or documents to attach to the training record. Maximum file size for each uploaded document is 5 MB.
- Supported uploaded document file types are pdf, doc, docx, xls, xlsx, ppt, pptx, pps, ppsx, odt, key, jpg, png, gif, and jpeg.

1. From the Student Portal navigation bar, click **My Training**.

My Training page (page 25) opens.

2. Click the Active, History, or All tab.
3. Click **Add a Training Record**.

The Add Record page opens.

4. Enter a name for the training you accomplished.
5. Enter comments to describe the training.
6. Select the date you completed the training.
7. (If applicable) Complete any custom fields.

Note: Custom fields only appear if your administrator added them via the Administration Portal (Enterprise>Configuration>Custom Fields).

8. (If applicable) Click **Attach File**. Browse and find the document and then double-click to select it.

Tip: To attach multiple files, repeat step 8 for each document you want to upload.

9. Click **Save**.

View attachment attached to a training history record

1. From the Student Portal navigation bar, click **My Training**.

My Training page (page 25) opens.

2. Click the History or All tab.
3. In the data grid in the Name column, click a history training record.
4. On the Training Details page, click the attachment.

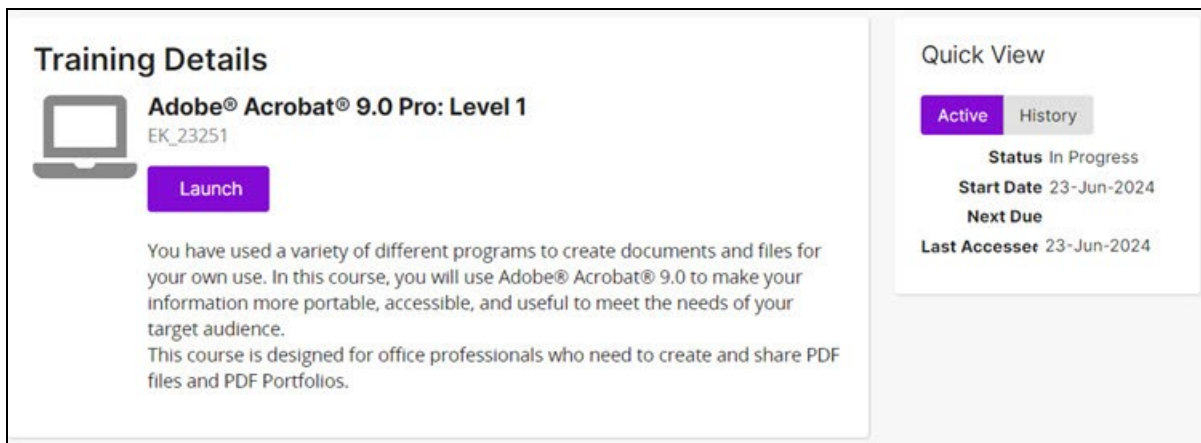
Edit a training record

1. From the Student Portal navigation bar, click **My Training**.

My Training page (page 25) opens.

2. Click the History or All tab.
3. In the data grid in the Name column, click a history training record.
4. Click **Edit**.
5. On the Edit Record page, make changes.
6. Click **Save**.

Training Details page



Training Details

 **Adobe® Acrobat® 9.0 Pro: Level 1**
EK_23251

Launch

You have used a variety of different programs to create documents and files for your own use. In this course, you will use Adobe® Acrobat® 9.0 to make your information more portable, accessible, and useful to meet the needs of your target audience.
This course is designed for office professionals who need to create and share PDF files and PDF Portfolios.

Quick View

Active History

Status In Progress
Start Date 23-Jun-2024
Next Due
Last Accesser 23-Jun-2024

The Training Details page shows details about training you selected on the My Training page. Details shown vary based on training type (in-class course, online course, assignment, or competency).

Prerequisites panel

If training requires prerequisites, they appear in the Prerequisites panel. Prerequisites must be completed before you can launch online courses or assignments or enroll in in-class courses.

Quick View

Quick View shows the current status of your active training and details of any history you have with this training.

Buttons, links, and options

Launch

Launches an online course or assignment.

Enroll

Opens the Enroll window so you can enroll in an in-class course.

Schedule

For competencies, shows the in-class courses you can choose to enroll in.

Cancel Enrollment

Opens the Cancel window so you can cancel your enrollment in an in-class course.

Show Details

Expands to show in-class course details, including event type, location, address, directions, and notes.

Hide Details

Contracts (hides) in-class course details.

View online course details

1. From the Student Portal navigation bar, click **My Training**.

My Training page (page 25) opens.

2. Click the Active, History, or All tab.
3. Do one of the following:
 - In the data grid in the Name column, click an online course link.
 - In the data grid beside an online course, click  and then click **Details**.

The **Training Details page** (page 28) opens.

View online course prerequisites

1. From the Student Portal navigation bar, click **My Training**.

My Training page (page 25) opens.

2. Click the Active, History, or All tab.
3. In the data grid beside an online course, click  and then click **View Prerequisites**.

Launch an online course

1. From the Student Portal navigation bar, click **My Training**.

My Training page (page 25) opens.

2. Click the Active tab.
3. Do one of the following:
 - In the data grid beside an online course, click  and then click **Launch**.
 - In the data grid in the Name column, click an online course link. On the **Training Details page** (page 28), click **Launch**.

The online course launches in the Course Console.

Remove an online course from active training

Note: You can only remove an online course if it is set up to allow cancellation, is not purchased, and is not required (pushed by a qualification).

1. From the Student Portal navigation bar, click **My Training**.
My Training page (page 25) opens.
2. Click the Active tab.
3. In the data grid beside an online course, click  and then click **Remove**.

Review a completed online course or assignment

1. From the Student Portal navigation bar, click **My Training**.
My Training page (page 25) opens.
2. Click the History tab.
Training history records are displayed.
3. In the data grid beside a completed online course or assignment, click  and then click **Review**.

View an online course certificate

1. From the Student Portal navigation bar, click **My Training**.
My Training page (page 25) opens.
2. Click the History tab.
Training history records are displayed.
3. In the data grid beside a completed online course, click  and then click **Certificate**.
Depending on your browser, the certificate is displayed in a viewer or downloaded to your computer.

Print an online course certificate

1. From the Student Portal navigation bar, click **My Training**.
My Training page (page 25) opens.
2. Click the History tab.
Training history records are displayed.
3. In the data grid beside a completed online course, click  and then click **Certificate**.
Depending on your browser, the certificate is displayed in a viewer or downloaded to your computer.
4. If certificate is:
 - Displayed in a viewer, use the viewer's print button to print.
 - Downloaded to your computer, open the certificate in a pdf viewer and use the print button to print.

View in-class course details

1. From the Student Portal navigation bar, click **My Training**.
My Training page (page 25) opens.

2. Click the Active tab.
3. Do one of the following:
 - In the data grid in the Name column, click an in-class course link.
 - In the data grid beside an in-class course, click  and then click **Details**.

The **Training Details page** (page 28) opens.

View in-class course prerequisites

1. From the Student Portal navigation bar, click **My Training**.
My Training page (page 25) opens.
2. Click the Active tab.
3. Do one of the following:
 - In the data grid in the Name column, click an in-class course link.
 - In the data grid beside an in-class course, click  and then click **Prerequisites** or **Details**.

The **Training Details page** (page 28) opens.

Prerequisites and prerequisite notes (if any) are listed in the Prerequisites panel.

View materials for an in-class course

Tip: You can also view materials from the Course Catalog.

1. From the Student Portal navigation bar, click **My Training**.
My Training page (page 25) opens.
2. Click the Active tab.
3. Do one of the following:
 - In the data grid in the Name column, click an in-class course link.
 - In the data grid beside an in-class course, click  and then click **Details**.

The **Training Details page** (page 28) opens.

Materials are listed in the Materials panel.

4. Click **Launch** beside an item to view it.

Enroll in an in-class course

1. From the Student Portal navigation bar, click **My Training**.
My Training page (page 25) opens.
 Click the Active tab.
2. Do one of the following:
 - In the data grid in the Name column, click an in-class course link.

- In the data grid beside an in-class course, click  and then click **Schedule** or **Details**.

The **Training Details page** (page 28) opens.

3. In the In-Class Courses panel, find the in-class course you want.

Tip: Click **Show Details** to view details such as event type, location, address, directions, and more.

4. If the in-class course:

- Does not require enrollment approval, click **Enroll**. From the Enroll window, click **Enroll**. You are enrolled.
- Requires approval before enrollment, click **Waitlist**. After your supervisor approves, you are enrolled.

Cancel your enrollment in an upcoming in-class course

Note: You cannot cancel your enrollment if the in-class course does not allow cancellation, cancellation cutoff date has passed, or you have been removed from enrollment by your supervisor or administrator.

1. From the Student Portal navigation bar, click **My Training**.

My Training page (page 25) opens.

Click the Active tab.

2. Do one of the following:

- In the data grid in the Name column, click an in-class course link.
- In the data grid beside an in-class course, click  and then click **Details**.

The **Training Details page** (page 28) opens.

3. In the In-Class Courses panel, find the in-class course you want.

Tip: Click **Show Details** to view details such as event type, location, address, directions, and more.

4. Click **Cancel Enrollment**.

5. From the Cancel Enrollment window, enter a cancellation reason (optional) and then click **OK**.

Remove yourself from an in-class course waitlist

1. From the Student Portal navigation bar, click **My Training**.

My Training page (page 25) opens.

2. Click the Active tab.

3. Do one of the following:

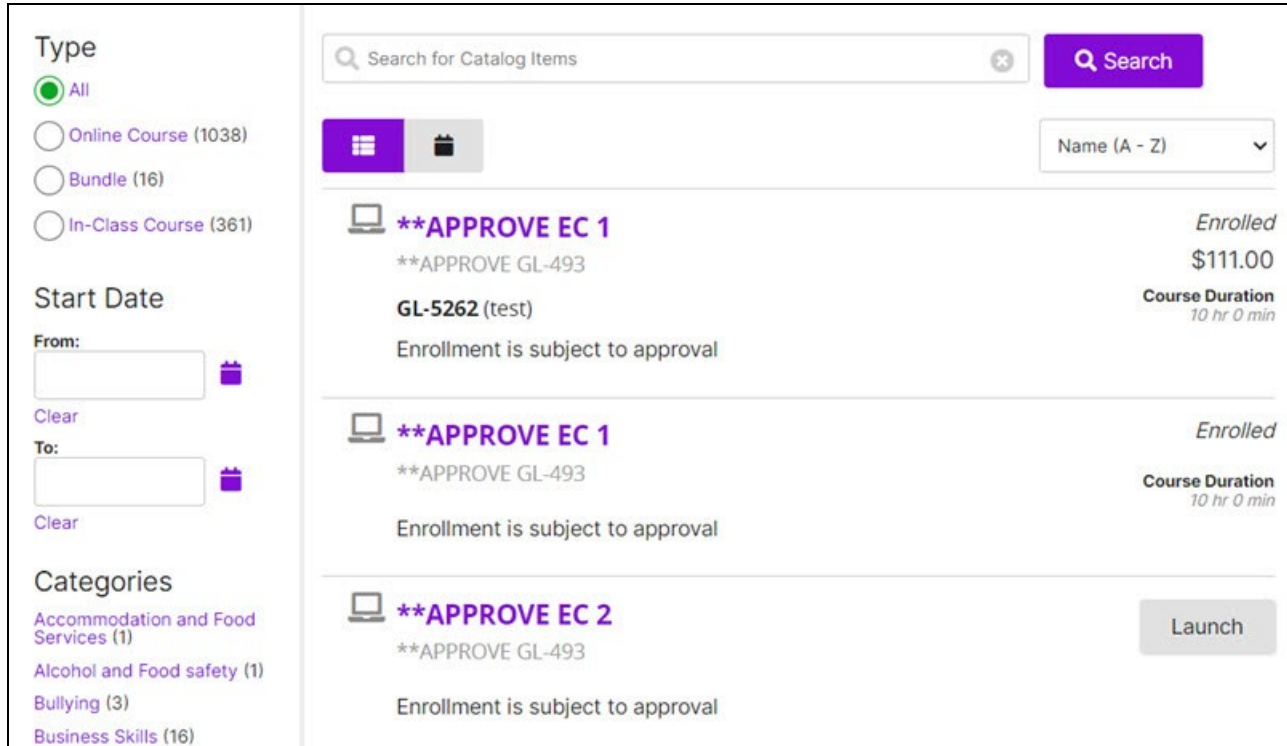
- In the data grid in the Name column, click an in-class course link.
- In the data grid beside an in-class course, click  and then click **Details**.

The **Training Details page** (page 28) opens.

4. In the In-Class Courses panel, find the in-class course you want.

5. Click **Cancel from Waitlist**.
6. On the Cancel from Waitlist window, click **OK**.

Course Catalog



The screenshot shows the Course Catalog interface. On the left, there are filters for Type (All, Online Course (1038), Bundle (16), In-Class Course (361)), Start Date (From, To), and Categories (Accommodation and Food Services (1), Alcohol and Food safety (1), Bullying (3), Business Skills (16)). The main area has a search bar with the text 'Search for Catalog Items' and a 'Search' button. Below the search bar, there are three course listings. Each listing includes a laptop icon, the title '**APPROVE EC 1', the course code '**APPROVE GL-493', and the enrollment status 'Enrollment is subject to approval'. The first two listings also show the price '\$111.00' and the course duration '10 hr 0 min'. The third listing has a 'Launch' button.

The Course Catalog contains course catalog items that you can select for your training needs. When you open it, all catalog items appear in the results panel. Every catalog item based on your membership criteria, from A to Z, is shown.

Searching

To find a specific course catalog item, enter a keyword or keywords in the search box. Search results are displayed by relevance. Most relevant search results appear at the top of the list. Relevance is based on how closely a keyword matches and which field is queried. An all word or exact match in a title field is listed before an all word or exact match in a description. Partial word matches rank lower and appear later in the list.

Example: If you search for *Excel*, course catalog items with Excel in the title appear first followed by items with Excel in the description. Catalog items containing the word, *excellent*, in the title or description appear later in the list. You could further limit the search by adding Microsoft as a keyword. Results with Microsoft Excel in the title appear first, then description, and so on.

Tip: The search process does not currently support quotes. Do not type quotes when searching.

Sorting

You can sort the catalog by name, product code, and price. Name sort (A-Z) is the default.

Note: Relevance becomes the sort order when you type keywords in the search box.

Filtering

You can filter by:

- Type
- Category
- In-Class Course date

For type and category, filtering is dynamic, which means available formats and categories vary depending on the search results. For example, if your catalog includes in-class courses, online courses, and bundles, you can filter by those types. If your catalog items are defined with categories, you can filter by those types. The number in parenthesis beside a filter indicates the number of results for that filter.

To filter by:	Do this:
Type	Click an option.
Category	Click a category link. Note: The top five most popular categories are shown in order of popularity. To see other available categories, click Show All categories.
In-class Course date	You can search the catalog for scheduled in-class courses and filter by date range. Select a start date, end date, or both. (See table below for details.)
When you enter a:	The Course Catalog shows:
From and To date	All courses that fall within the range you specified.
From date only	All courses with a start date on or after the From date.
To date only	All courses from the current date up to and including the To date.

Navigating

Scrollbar

Click to scroll down and see more catalog item results.



Click a page number link to move to that page.

Click the arrows to move to previous or next page.

Click the double arrows to move to the first page or last page.



Click to specify how many items to display on a page. (Your page size selection is saved when you navigate away from the course catalog.)

Results panel

The results panel (right side of page) shows course catalog items. You can easily tell what type of item it is by the icon.

This icon:	Represents:
	Online Course
	In-Class Course
	Bundle

Each course catalog item title is a hyperlink. Click it to see details such as product code, course description, syllabus notes, course outline, materials, and more.

Action buttons

This button:	Does this:
Add to cart	Adds the course catalog item to your shopping cart for purchase. (Only applies to course catalog items with a price.) Note: This action is only available when eCommerce function is enabled.
Add to My Training	Adds the online course to your My Training page.
Cancel Enrollment	Cancels your enrollment in a class in which you are registered.
Remove from Cart	Removes a course catalog item from your shopping cart.
Schedule	Displays the scheduled classes you can choose to enroll in.
Subscribe	Shows available subscription options on the Details page.

Shopping cart icon



If you have selected catalog items for purchase, the shopping cart icon appears at the top of the page. The number indicates the number of items in your cart. Click the icon to open the shopping cart.

Access a course catalog

1. From the navigation bar, click **Course Catalog**.

The **Course Catalog** (page 33) opens.

2. (If applicable) Sort and filter the catalog.

View details for a course catalog item

1. From the navigation bar, click **Course Catalog**.

The **Course Catalog** (page 33) opens.

2. (If applicable) Filter and sort the catalog.
3. For the course catalog item you want to view, click the title hyperlink.

Add a course catalog item to My Training

1. From the navigation bar, click **Course Catalog**.

The **Course Catalog** (page 33) opens.

2. (If applicable) Filter and sort the catalog.
3. For the course catalog item you want, click **Add to My Training**.

The item is added to your My Training page.

Enroll your team members in an online course

1. From the navigation bar, click **Course Catalog**.

The **Course Catalog** (page 33) opens.

2. (If applicable) Filter and sort the catalog.
3. Click the course title hyperlink.
4. Click the **Enroll My Team** link.
5. To enroll:
 - All team members, click the **All** check box.
 - Individual team members, click the check box beside their name.
6. (If applicable) To set a required due date, click the **Required** check box and select a date.
7. Click  **Enroll My Team**. (This button also shows number of selected team members.)
8. On the confirmation page, click **Enroll**.

Remove (cancel) team members from an online course

1. From the navigation bar, click **Course Catalog**.

The **Course Catalog** (page 33) opens.

2. (If applicable) Filter and sort the catalog.
3. Click the course title hyperlink.
4. Click the **Enroll My Team** link.
5. To cancel enrollment for:
 - All team members, click the **All** check box.
 - Individual team members, click the check box beside their name.
6. Click **Cancel Enrollment**. (This button also shows number of selected team members.)
7. On the Cancel Enrollment page, enter a reason for the cancellation and click **OK**.

Find in-class courses scheduled during a specific time period

1. From the navigation bar, click **Course Catalog**.

The **Course Catalog** (page 33) opens.

2. In the Filter by date section, use the calendar pop-ups to select a From date, To date, or both.

When you enter a:	The Course Catalog shows:
From and To date	All courses that fall within the range you specified.
From date only	All courses with a start date on or after the From date.
To date only	All courses from the current date up to and including the To date.

The Course Catalog is filtered and shows results during the time period you specified.

Tip: If you want to see courses in calendar view, click .

Enroll in a class from the course catalog

1. From the navigation bar, click **Course Catalog**.
2. (If applicable) Filter and sort the catalog.
3. For the class you want to enroll in, click **Schedule**.

The available scheduled classes are shown.

4. For the scheduled class you want, click **Enroll**.

Note: If a class is full or requires supervisor approval, you cannot enroll but can be placed on a waitlist.

5. On the confirmation page, click **Enroll**.

Get on a class waitlist

1. From the navigation bar, click **Course Catalog**.
2. (If applicable) Filter and sort the catalog.
3. For the class you want, click **Schedule**.

The available scheduled classes are shown.

4. For the class you want, click **Enroll**.
5. At the prompt, click **Waitlist**.

A message shows that you are placed on a waitlist. Class status shows Waitlisted. Rival Learn sends a waitlist notification email to you.

Cancel your enrollment in a class

1. From the navigation bar, click **Course Catalog**.
2. (If applicable) Filter and sort the catalog.
3. For the class enrollment you want to cancel, click **Cancel Enrollment**.

4. On the Cancel Enrollment page, type a reason for the cancellation and click **OK**.

A message alerts you that you canceled your enrollment. Rival Learn sends an email to notify that you successfully canceled your enrollment.

Enroll your team members in a class

1. From the navigation bar, click **Course Catalog**.

The **Course Catalog** (page 33) opens.

2. (If applicable) Filter and sort the catalog.
3. Click the class title hyperlink.

Note: If a class is full, (Full) appears below the course hours. You cannot enroll your team members but they can be placed on a waitlist.

4. Click the **Enroll My Team** link.
5. To enroll:
 - All team members, click the **All** check box.
 - Individual team members, click the check box beside their name.
6. (If applicable) To set a required due date, click the **Required** check box and select a date.
7. Click  **Enroll My Team**. (This button also shows number of selected team members.)
8. On the confirmation page, click **Enroll**.

Cancel a class enrollment for a team member

1. From the navigation bar, click **Course Catalog**.

The **Course Catalog** (page 33) opens.

2. (If applicable) Filter and sort the catalog.
3. Click the class title hyperlink.
4. Click the **Enroll My Team** link.
5. To cancel enrollment for:
 - All team members, click the **All** check box.
 - Individual team members, click the check box beside their name.
6. Click **Cancel Enrollment**. (This button also shows number of selected team members.)
7. On the Cancel Enrollment page, enter a reason for the cancellation and click **OK**.

A message alerts you that the team member's enrollment is canceled.

An email is sent to the team member(s).

Add a course catalog bundle to your training

1. From the navigation bar, click **Course Catalog**.

The **Course Catalog** (page 33) opens.

2. (If applicable) Filter and search the catalog to find the bundle you want.
3. For the bundle you want, click **Add to My Training**.

A confirmation page shows the ecourses that will be added to your My Training page. It also shows if one or more courses require approval.

Note: Ecourses that you are already enrolled in are *not* added to your training.

4. Click **OK**.

Assign course catalog bundles to your team members

1. From the navigation bar, click **Course Catalog**.

The **Course Catalog** (page 33) opens.

2. (If applicable) Filter and sort the catalog.
3. Click the course bundle title hyperlink.
4. Click the **Enroll My Team** link.
5. To enroll:
 - All team members, click the **All** check box.
 - Individual team members, click the check box beside their name.
6. (If applicable) To set a required due date, click the **Required** check box and select a date.
7. Click  **Enroll My Team**. (This button also shows number of selected team members.)
8. On the confirmation page, click **Enroll**.

Shopping Cart



The Shopping Cart lists the course catalog items that you added to your cart for purchase along with the total amount of your purchases. The shopping cart has the following steps or pages:

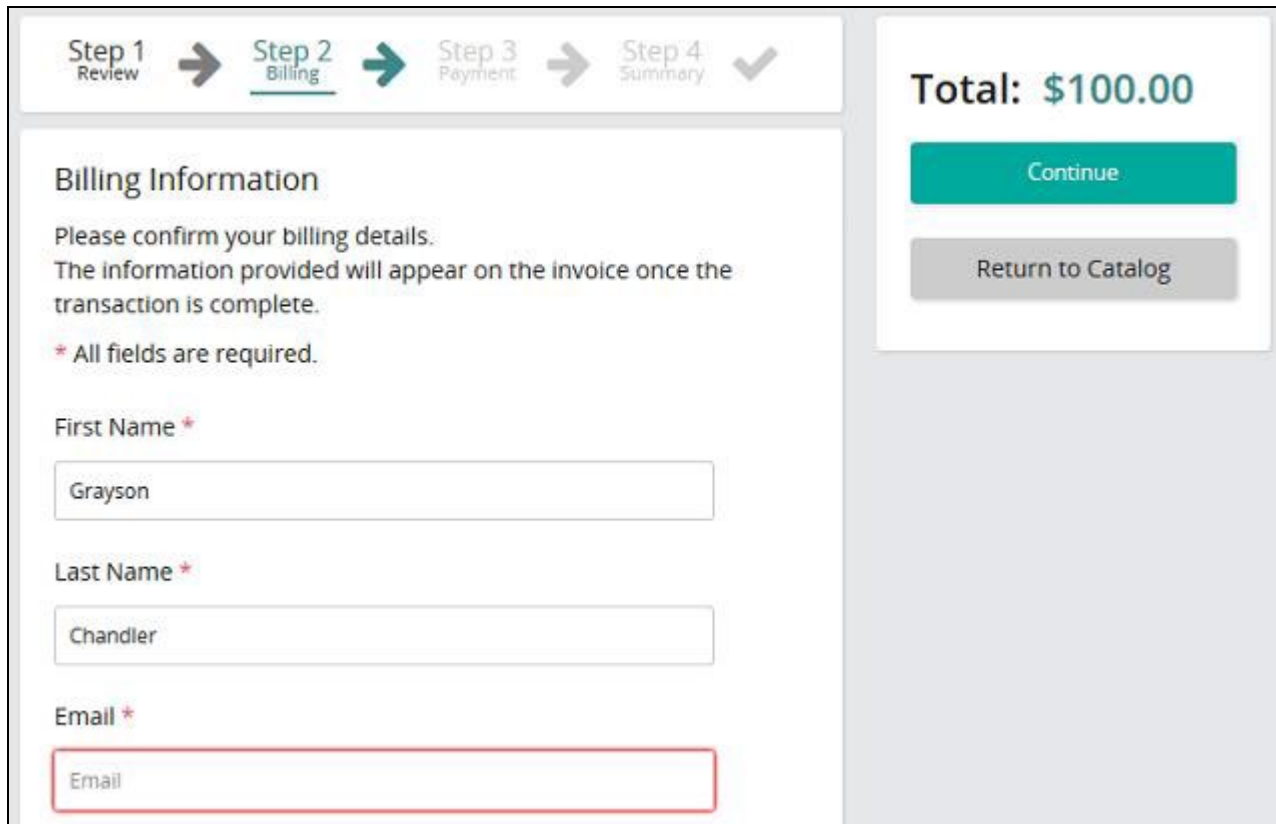
- Step 1: Review
- Step 2: Billing
- Step 3: Payment
- Step 4: Summary

Step 1: Review

This page shows the course catalog items you choose for purchase along with total cost. You can also search for catalog items using the Search for catalog items search box. The typical workflow consists of

verifying all the catalog items for purchase are listed and the total purchase price is accurate. After that, you go to the Billing page. You can even return to the course catalog if you are not ready to check out.

Step 2: Billing

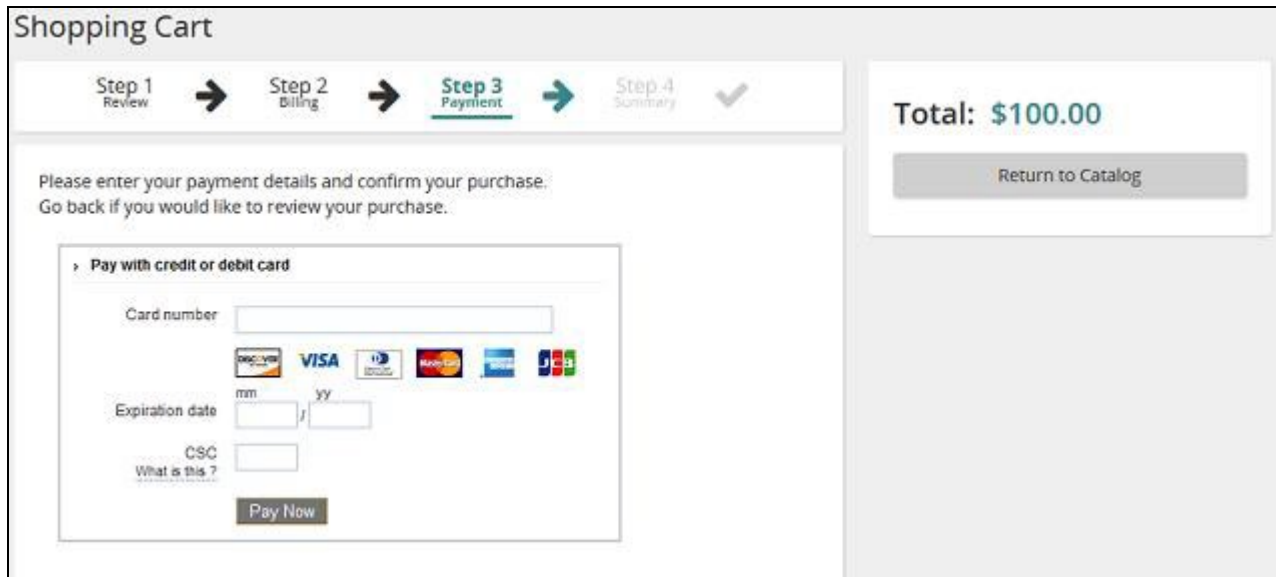


The screenshot shows the 'Step 2: Billing' page in the Rival Learn checkout process. At the top, a progress bar indicates four steps: Step 1 Review, Step 2 Billing (current step), Step 3 Payment, and Step 4 Summary. To the right, the total amount is displayed as 'Total: \$100.00'. Below the total are two buttons: a teal 'Continue' button and a gray 'Return to Catalog' button. The main section is titled 'Billing Information' and contains instructions: 'Please confirm your billing details. The information provided will appear on the invoice once the transaction is complete.' A note states '* All fields are required.' There are three input fields: 'First Name' with the value 'Grayson', 'Last Name' with the value 'Chandler', and 'Email' which is currently empty and highlighted with a red border.

This page shows your billing information. Rival Learn automatically populates fields using information from the Contact Information section in Student Properties (Learning>Plan>Students) if available.

Typical workflow consists of verifying billing information and making changes if necessary. After that, you go to the Payment page. You can also return to the review step or course catalog.

Step 3: Payment



Shopping Cart

Step 1 Review → Step 2 Billing → **Step 3 Payment** → Step 4 Summary ✓

Total: \$100.00

[Return to Catalog](#)

Please enter your payment details and confirm your purchase.
Go back if you would like to review your purchase.

Pay with credit or debit card

Card number

Expiration date /

CSC

What is this ?

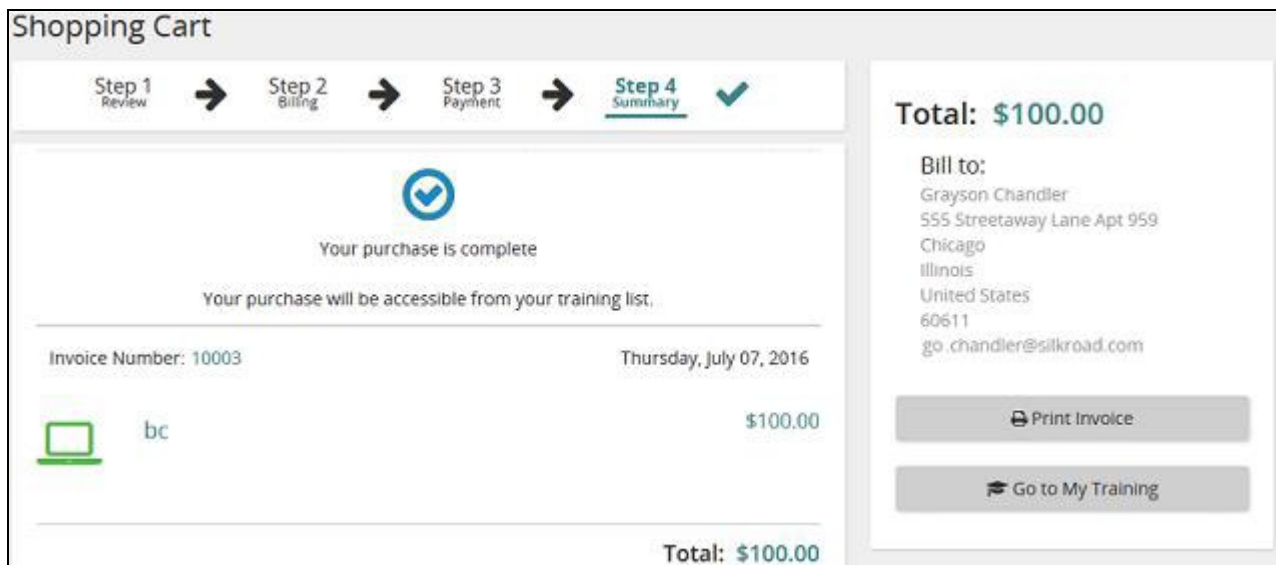
[Pay Now](#)

Depending on your site's PayPal account, you may have two payment options: To pay with:

- PayPal, click the **Checkout with PayPal** button and proceed.
- Credit card, enter your credit card information, and click the **Pay Now** button to complete your purchase.

Tip: You can also go back to previous steps and even return to the course catalog.

Step 4: Summary



Shopping Cart

Step 1 Review → Step 2 Billing → Step 3 Payment → **Step 4 Summary** ✓

Total: \$100.00

[Print Invoice](#)

[Go to My Training](#)

Your purchase is complete

Your purchase will be accessible from your training list.

Invoice Number: 10003 Thursday, July 07, 2016

	bc	\$100.00
		Total: \$100.00

The Summary page is the confirmation of your purchase. You can print an invoice, return to the course catalog, or go to your My Training page.

Add a course catalog item to your shopping cart

1. From the navigation bar, click **Course Catalog**.

The **Course Catalog** (page 33) opens.

2. (If applicable) Filter and sort the catalog.
3. For the course catalog item you want to purchase, click **Add to Cart**.

The catalog item is added to your shopping cart.

Note: The shopping cart icon increments each time you add an item. This makes it easy to see how many items are in your cart.

4. If you are ready to check out, follow the steps in **Check out and pay for your shopping cart items** (on page 42).

Remove a course catalog item from your shopping cart

Note: You cannot remove an item from your shopping cart if you have already purchased it.

1. From the navigation bar, click **Course Catalog**.

The **Course Catalog** (page 33) opens.

2. Click the shopping cart icon.
3. In the shopping cart beside an item, click **Remove**.

The catalog item is removed from your shopping cart.

Check out and pay for your shopping cart items

Note: This topic assumes you have added course catalog items to your shopping cart and you are ready to pay for them.

1. In the **Course Catalog** (page 33), click the shopping cart icon.

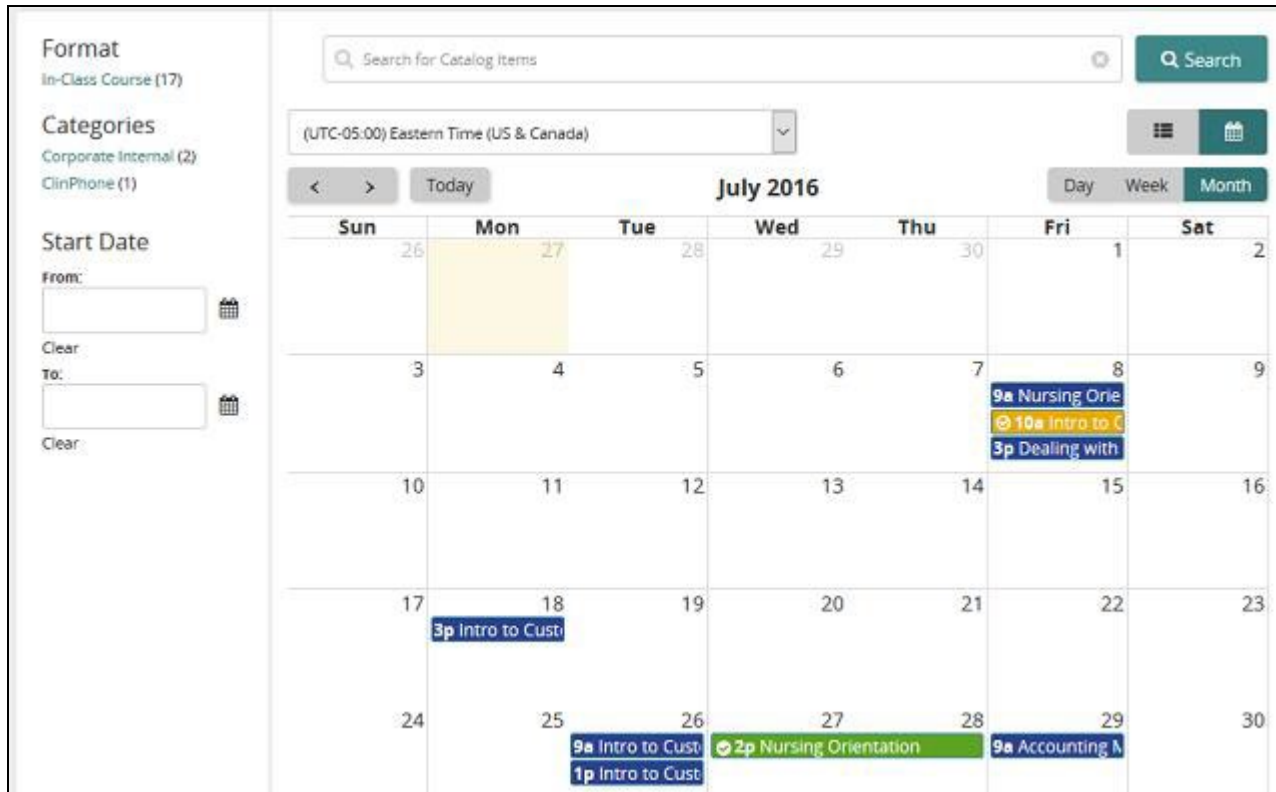
The **Shopping Cart** (page 39) opens.

2. Click **Checkout**.
3. If your billing information is not pre-populated, enter it.
4. Verify your billing information.
5. Click **Continue**.
6. Enter your payment information and click **Pay Now**.

The Summary page shows a summary of your purchase.

7. (Optional) Click **Print Invoice** to print an invoice for your records.

Course Catalog (calendar view)



Format
In-Class Course (17)

Categories
Corporate Internal (2)
ClinPhone (1)

Start Date
From:
Clear
To:
Clear

Search for Catalog Items

(UTC-05:00) Eastern Time (US & Canada)

< > Today July 2016 Day Week Month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6	7	8 9a Nursing Orie 10a Intro to C 3p Dealing with	9
10	11	12	13	14	15	16
17	18 3p Intro to Cust	19	20	21	22	23
24	25 9a Intro to Cust 1p Intro to Cust	26 2p Nursing Orientation	27	28	29 9a Accounting M	30

You can view the course catalog as a calendar by clicking . The calendar view shows available in-class courses. You can quickly find courses to enroll in, view course details, and also determine if you are already enrolled. Hover your mouse over an item to see brief details, or click it to view in-depth details.

Color-coded items

This color:	Means:
Blue	Class is available
Green	You are enrolled
Yellow	You are waitlisted

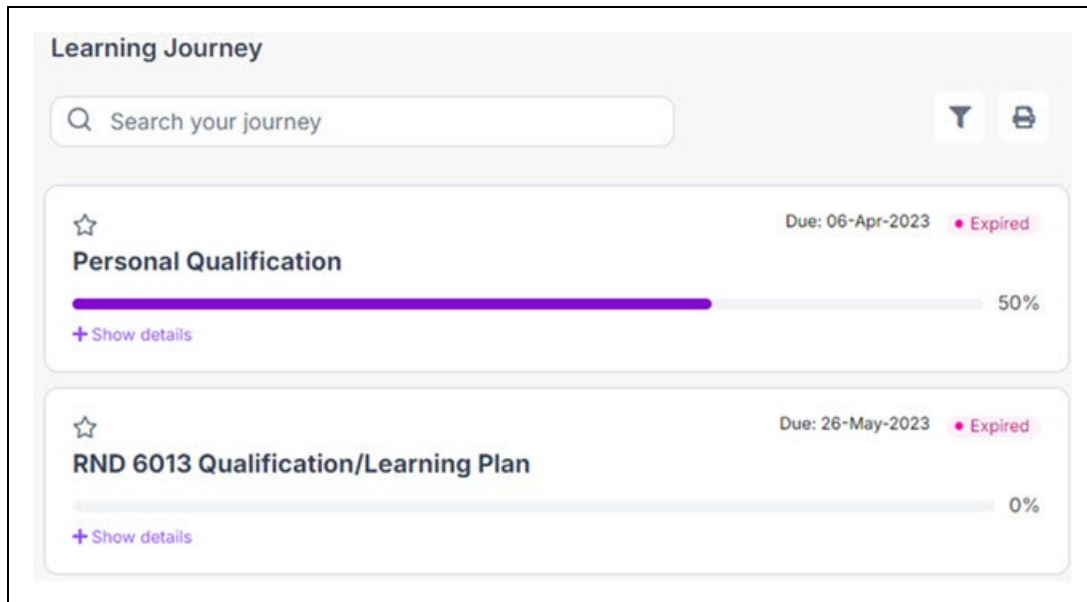
Searching, sorting, and filtering

The search, sort, and filter options work the same here as in course catalog view.

Time zone

The time zone defaults to the company time zone setting. However, you can select a personal time zone so that scheduled events appear in the calendar relative to that selected time zone. Once set, the personal time zone remains—even after you log out—until you select another time zone. (Personal time zone is not a system-wide setting. It is a user setting that is specific to the user who selected it.)

Learning Journey



A Learning Journey shows qualifications assigned to you. Qualifications consists of courses, activities (interventions), competencies, requirements, assignments, and so on. Completing them supports the development of job skills and knowledge.

Learning Journeys are sorted by Next Due Date by default. They are listed in order of decreasing urgency: Expired, Not Met, Due, Met.

You can "star" or mark a Learning Journey as a favorite. It will appear first on the page.

Click  to generate a Learning Journey report.

Searching and filtering

- Click  to show/hide filters.
- You can filter by All, Due, Completed, Not Completed or Favorites; All Categories, No Categories, or a specifically selected category.
- You can sort by Next Due Date, Mastery Date, or Status in either ascending or descending order.
- Once set, filters remain set until you change them or select Clear all filters.

Progress bar, dates, and links

Each Learning Journey has a progress bar that indicates its overall status.

Learning Journeys with a due date display the date until Met. If the status is Met, the mastered date shows.

Each Learning Journey item is a link. Click to view details.

Statuses and icons

Status	Description	Technical description
Met	Student has completed/passed the interventions within the time frame.	Certification has a Mastery Date Greater than (Activation Date or Reactivation Date) AND (less than the Expiration Date or

Status	Description	Technical description
		Recertification Date)
Not Met	Student has NOT completed/passed the interventions but has until the due date to complete them.	Certification has no Mastery Date AND CURRENT DATE is greater than Effective Date AND less than Expiration Date
Due	Student has interventions that are due.	Certification has no Mastery Date AND CURRENT DATE is equal or greater than (Effective Date or Activation Date) OR Certification mastery date is less than (Activation Date or Reactivation Date) AND CURRENT DATE is equal or greater than (Activation Date or Reactivation Date)
Expired	Student has NOT completed/passed the interventions within the due date.	Certification has no Mastery Date and Current Date is greater than Expiration Date OR Certification has a Mastery Date less than (Activation Date or Reactivation Date) and CURRENT DATE is greater than (Expiration Date or Recertification Date)

Icons indicate status for individual content:

Icon	Status
	Expired
	Not Met
	Due
	Started
	Met

Categories

If a Learning Journey has categories assigned, they appear in gray "bubbles".

View my Learning Journeys

1. From the Student Portal navigation bar, click **Learning Journey**.

The **Learning Journey page** (see "**Learning Journey**" on page 44) opens and displays your Learning Journeys.

2. Use the search bar or sort filter to find a specific learning journey.
3. To view details, click **+Show details**.
4. To access a learning journey, click it's name. (It's a link.)

Training Reports

Reports		
^ Name	Description	
GL Exam Results - Sexual Harassment Policies		Download
GL Student History	Student History Report	Download

Use this page to view and download your training reports. The reports vary based on the reports your system administrator has enabled for viewing.

View a training report

1. From the Student Portal navigation bar, click **Training Reports**.

The **Training Reports page** (page 46) opens.

2. In the data grid In the Name column, click a link.

Depending on your browser settings, the report downloads or appears in a pdf viewer.

Download a training report

1. From the Student Portal navigation bar, click **Training Reports**.

The **Training Reports page** (page 46) opens.

2. In the data grid beside a report, click **Download**.

The report is downloaded to your computer.

References

The Training References page displays additional links and files that a student can download or access within Rival Learn. Examples of resources include:

- Company organizational charts
- Training policies and procedures
- Benefits manuals
- Company manuals
- Job aids

Click a link to access a particular training reference.

Buttons, links, and options

Type text to search for specific references. As you type, results are limited by your search criteria and appear in the panel.

My Team page

My Team			
Team Approvals		Search your journey	
	Learning Journey	Approvals	Training
MB Mark Bello Last Login Date: 29-Aug-2024	 Met: 0 Started: 0 Due: 3 Not Met: 0 Expired: 0	 Pending: 0	 Not Started: 6 Complete: 2 Started: 4 Expired: 0
DD David Dunn Last Login Date: 21-Jun-2024	 Met: 0 Started: 0 Due: 0 Not Met: 0 Expired: 0	 Pending: 0	 Not Started: 0 Complete: 0 Started: 0 Expired: 0

My Team page gives supervisors a snapshot view of what their team members are doing and lets them perform actions like:

- Access a team member's Learning Journey, Approvals page, Training page
- Manage registrations (add, edit, and cancel registrations)
- Approve registrations
- Add adhoc assignments

Buttons, links, and options



Click to access a team member's Learning Journey.



Click to access a team member's Approvals page.



Click to access a team member's Training page.



(Actions)

Click to perform an action:

- Manage Registrations
- Add Registration
- Add Adhoc Assignment
- History Report
- Learning Journey Report



Click to see a direct report's downline team members.

Add a registration for a team member

- After you register a team member for training, it appears on their My Training page.

1. From the navigation bar, click **My Team**.

My Team page (on page 47) opens.

2. For a team member, click  and click **Add Registration**.
3. Select a training type: assignment, competency, eCourse, or training activity.
4. Select the specific assignment, competency, eCourse, or training activity.
5. (If applicable) Enter a comment.
6. Select a due date.
7. Click **Save**.

Edit a team member's registration

1. From the navigation bar, click **My Team**.

My Team page (on page 47) opens.

2. For a team member, click  and click **Manage Registrations**.

The Registration page opens.

3. Beside a registration, click  and click **Edit Registration**.
4. On the Edit Registration page, make changes.
5. Click **Save**.

Cancel a team member's registration

1. From the navigation bar, click **My Team**.

My Team page (on page 47) opens.

2. For a team member, click  and click **Manage Registrations**.

The Registration page opens.

3. Beside a registration, click  and click **Cancel Registration**.
4. On the Cancel Registration window, click **Remove**.

Add an adhoc assignment for a team member

1. From the navigation bar, click **My Team**.

My Team page (on page 47) opens.

2. For a team member, click  and click **Add Adhoc Assignment**.

The Adhoc Assignment Registrations page opens.

3. Enter a name for the assignment.
4. Enter the assignment contents.

Tip: You can format assignment contents, add links, and so on.

5. (If applicable) Enter a comment.
6. Select a due date for the assignment.
7. Click **Save**.

View a team member's Learning Journey

- You can view a team member's Learning Journeys to see what they have going on.

1. From the navigation bar, click **My Team**.

My Team page (on page 47) opens.

2. For a team member, click .

The team member's **Learning Journeys page** (see "**Learning Journey**" on page 44) opens.

View pending approvals for a team member

1. From the navigation bar, click **My Team**.

My Team page (on page 47) opens.

2. For a team member, click .

The Approvals page opens.

The team member's in-class and online course pending approval requests are shown.

View pending approvals for all team members

1. From the navigation bar, click **My Team**.

My Team page (on page 47) opens.

2. Click the Approvals tab.

The My Team Approvals page opens.

In-class and online course pending approval requests for *all* team members are shown.

Approve an enrollment request for a team member

1. From the navigation bar, click **My Team**.

My Team page (on page 47) opens.

2. For a team member, click .

The Approvals page opens.

3. To approve:

- All pending enrollments, click **Approve All**.
- Individual pending enrollments, click  beside a request and click **Approve**.

4. On the Approve confirmation window, enter a comment (optional) and click **Approve**.

Approve enrollment requests for team members

- You can approve multiple—or all—enrollments for team members.
1. From the navigation bar, click **My Team**.
My Team page (on page 47) opens.
 2. Click the Approvals tab.
 3. To approve enrollment for:
 - Multiple team members, click the check box beside their names.
 - All team members, click the check box at the top of the data grid.
 4. Click **Approved Selected**.
 5. On the Approve confirmation window, enter an optional comment and click **Approve**.

Deny an enrollment request for a team member

1. From the navigation bar, click **My Team**.
My Team page (on page 47) opens.
2. For a team member, click ☒.
The Approvals page opens.
3. For the enrollment you want to deny, click ☐ and click **Deny**.
4. On the Deny confirmation window, enter an optional comment and click **Deny**.

Deny enrollment requests for team members

- You can deny multiple—or all—enrollments using these steps.
1. From the navigation bar, click **My Team**.
My Team page (on page 47) opens.
 2. Click the Approvals tab.
 3. To deny enrollment for:
 - Multiple team members, click the check box beside their names.
 - All team members, click the check box at the top of the data grid.
 4. Click **Deny Selected**.
 5. On the Deny confirmation window, enter an optional comment and click **Deny**.

Invoices

Invoices				
Invoice ID	Purchase Date	Balance	Total	
10003	07-Jul-2016	Paid	\$100.00	Download
10004	07-Jul-2016	Paid	\$20.00	Download
10010	08-Apr-2014	\$599.00	\$599.00	Download

Use this page to view or download your paid invoices or invoices with outstanding balances.

View an invoice

- From the Student Portal navigation bar, click **Invoices**.

The **Invoices page** (page 51) opens.

- In the data grid in the Invoice ID column, click a link.

Depending on your browser settings, the invoice downloads or appears in a pdf viewer.

Download an invoice

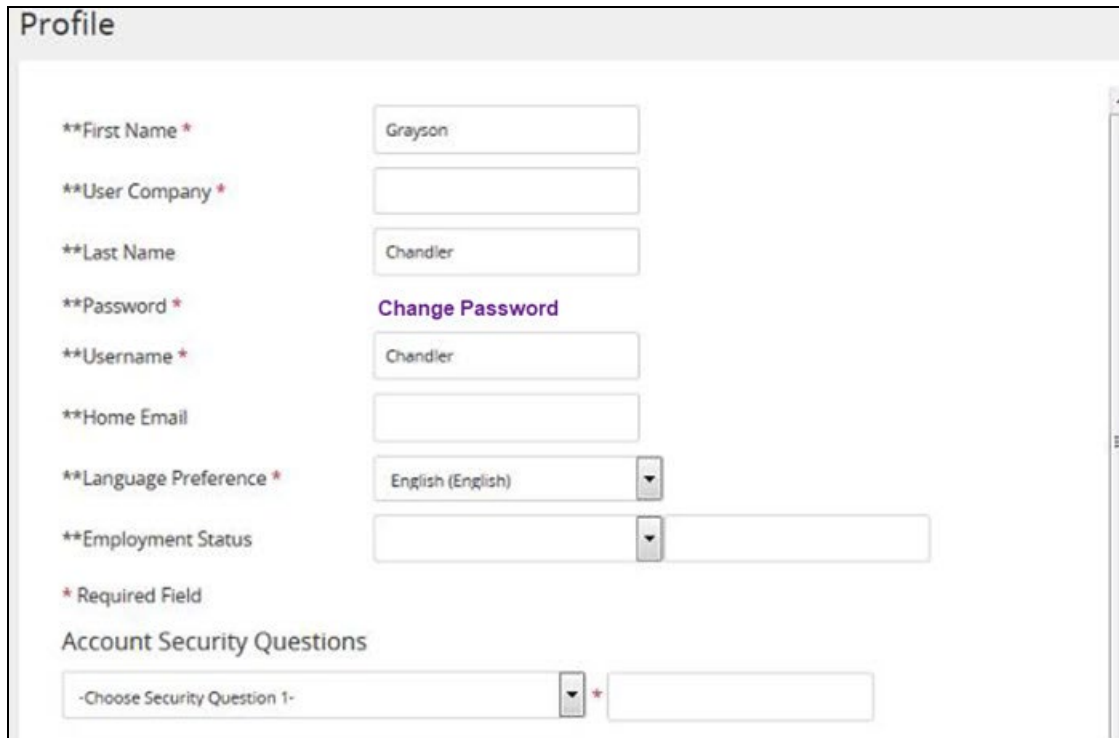
- From the Student Portal navigation bar, click **Invoices**.

The **Invoices page** (page 51) opens.

- In the data grid beside an invoice, click **Download**.

The invoice is downloaded to your computer.

Profile



The screenshot shows the 'Profile' page in Rival Learn. It contains several form fields for user information:

- **First Name ***: Text input with 'Grayson' entered.
- **User Company ***: Empty text input.
- **Last Name**: Text input with 'Chandler' entered.
- **Password ***: A link labeled 'Change Password' instead of a text input.
- **Username ***: Text input with 'Chandler' entered.
- **Home Email**: Empty text input.
- **Language Preference ***: Dropdown menu showing 'English (English)'.
- **Employment Status**: Dropdown menu with an empty selection.

 Below these fields is a section for 'Account Security Questions' with a dropdown menu showing '-Choose Security Question 1-' and an asterisk indicating it is a required field.

The Profile page provides details about your user account in Rival Learn, including your:

- First and last name
- Company
- User name, password information, and security questions
- Language preferences

Your current **student group** (see "**Student groups**" on page 75) memberships are also listed along with available student groups you can join. If a student group requires an authorization code to join, you can enter it here as well.

View your profile

- From the header, click your avatar, and then click **Profile**.

The **Profile page** (page 52) opens.

Change your name on your profile

1. From the header, click your avatar, and then click **Profile**.

The **Profile page** (page 52) opens.

2. In the First Name and Last Name fields, make changes as necessary.
3. Click **Submit**.

Change your password

1. From the header, click your avatar, and then click **Profile**.

The **Profile page** (page 52) opens.

2. Click **Change Password**.
3. On the Edit Password window, enter your current password.
4. Enter your new password and confirm it.
5. Click **Submit**.

The Edit Password window closes.

6. On the Profile page, click **Submit**.

The password change is effective on your next login.

Change your security questions

1. From the header, click your avatar, and then click **Profile**.

The **Profile page** (page 52) opens.

2. Click a security question drop-down, and then enter a response.
3. Click **Submit**.

Select a student group to join

Note: Only student groups that allow enrollment via the Student Portal are listed in the Group Selection grid.

1. From the header, click your avatar, and then click **Profile**.

The **Profile page** (page 52) opens.

2. In the Group Selection grid, click **Select** beside a group to join.

Note: Some groups required approval before you become part of them.

3. Click **Submit**.

Join a private student group

Note: If a student group requires an authorization code, you must enter it before you can become part of the group. Your system administrator or person responsible for sending authorization codes provides you with the code.

1. From the header, click your avatar, and then click **Profile**.

The **Profile page** (page 52) opens.

2. In the **Private group authorization code** box, enter your authorization code.
3. Click **Submit**.

Assess Classes page (for instructors)

Assess Classes

Class

Accounting 101

Scheduled Date : 2-Sept-2024 9:00 AM
MST

Status : *Scheduled*

Location : coursecatalog_venue_01 •
coursecatalog_traininglocation_01 •
Edmonton

Duration : 1 hr 0 min

Enrollments : 3

Show Details
Assess

Accounting 102

Scheduled Date : 2-Sept-2024 11:00 AM
PM MST

Status : *Scheduled*

Location : coursecatalog_venue_01 •
coursecatalog_traininglocation_01 •
Edmonton

Duration : 1 hr 0 min

Enrollments : 0

Show Details
Assess

Instructors can use this dashboard to:

- View currently-scheduled classes and enrollments
- Enter attendance and completion records for completed classes

The dashboard is searchable (title, location) and can be filtered by start date. By default, classes shown go back one month but you can filter for a custom start date range.

The Show Details link shows details, including a link to view classes sessions (if multiple sessions are offered.)

Enter attendance, marks, and mastery date for a class

- You can only assess classes in which you are the instructor.
- Assessing a class typically means entering attendance, marks, and mastery date for students who attended.
- Any student who is marked with No Show attendance is automatically assessed with an Incomplete and no Mastery Date is allowed.

1. From the Student Portal navigation bar, click **Assess Classes**.

The **Assess Classes** (page 54) dashboard opens.

2. (If applicable) Search for a class and filter to limit the results.
3. For a class, click **Assess**.

4. To access a class for:
 - A specific student, click the check box beside that user, click  and click **Assess**.
 - Multiple students, click the check box beside those users, click  (top of column) and click **Assess Selected**.
 - All students, click the check box (top of column), click  (top of column) and click **Assess Selected**.
5. Enter attendance, marks, and mastery date.

Tip: When a student record is marked Attended and a mark and Mastery Date are recorded, all previous incomplete records for the same training activity record has the Course Expiration Date automatically set to one day prior to the current Mastery Date. This expires any existing training page records for the same training activity and removes the courses from the user's Training page.

6. Click **Save**.

Change a class status to Complete

- You can only change status for a class (training event) in which you are the instructor.
 - You can change class status after you assess enrollments for *all* students in the class.
 - After you change class status, it cannot be reversed.
1. From the Student Portal navigation bar, click **Assess Classes**.
The **Assess Classes** (page 54) dashboard opens.
 2. (If applicable) Search for a class and filter to limit the results.
 3. For a class, click **Assess**.
 4. Enter attendance records for all the students in the class.
 5. Click **Set Class Status to Complete**.
 6. At the confirmation prompt, click **OK**.

Assess Checklists

Assess Checklists

Search User or Assignment

◆ User	◆ Assignment	◆ Completed	◆ Modified	◆ Status
SC srtAdam Chaters adam.chaters@silkroad.com	16121 Assignment FF1	27-May-2024	27-May-2024	Not Started
BB Beau Barr Beau!.Barr@fake.com	assignment	--	16-May-2024	In Progress
BC Brogan Cooper Brogan!.Cooper@fake.com	Swedish assignment	--	24-Jul-2023	Not Started

1 - 10 / 374

«

<

1

2

3

4

5

>

»

items / page

10

20

40

On the Assess Checklists page, you can:

- View checklists you are responsible for assessing or have accessed
- Open a checklist for a student and assess as the student performs checklist tasks
- Assign a checklist to a student

To access this page, your user ID must have the expert role assigned.

If you are using Checklist Expert membership groups, you only see those checklists associated with that membership group.

Searching and filtering

- You can search by user or assignment.
- Click  to show/hide filters.
- You can filter by status (All, Not Started, In Progress, Completed).
- You can filter to show immediate subordinates or all subordinates.
- You can sort by User, Assignment, Date Completed, Date Modified, and Status in either ascending or descending order.
- Once set, filters remain set until you change them.

Assign a checklist to a student

1. From the Student Portal navigation bar, click **Assess Checklists**.

The **Assess Checklists page** (page 56) opens.

2. Click .

3. Search for and select a student.
4. Search for and select an assignment.
5. Click **Add**.

Assess a checklist for a student

- The Assess Checklist menu option is only available for users who have the expert role assigned.
- If a checklist has a required field (red asterisk), you cannot assign a pass or fail grade until all required fields are completed.
- You cannot edit a submitted checklist unless an administrator **unsubmits** (see "**Unsubmit a checklist**" on page 119) it.

1. From the Student Portal navigation bar, click **Assess Checklists**.

The **Assess Checklists page** (page 56) opens.

2. (If applicable) Search and filter to limit results.
3. For the user and assignment you want to assess, click the **Assignment** link.

The checklist opens.

4. Assess the student as checklist tasks are demonstrated.

5. If you are:

- Not finished assessing the checklist and want to come back later, click . The checklist status shows as In Progress on the Assess Checklist page.
- Completely finished assessing the checklist, click **Pass** or **Fail** to indicate whether the student passed or failed. Note that:
 - A failed checklist is considered to be incomplete. On the Assess Checklist page, its status shows as Failed and there is no date in the Completed column.
 - A passed checklist is considered to be complete. On the Assess Checklist page, its status shows as Completed and there is a date in the Completed column.

Print a populated checklist

1. From the Student Portal navigation bar, click **Assess Checklists**.

The **Assess Checklists page** (page 56) opens.

2. (If applicable) Search and filter to limit results.
3. For the user and assignment you want to print, click the **Assignment** link.

The checklist opens.

4. Click .

Administration Portal overview

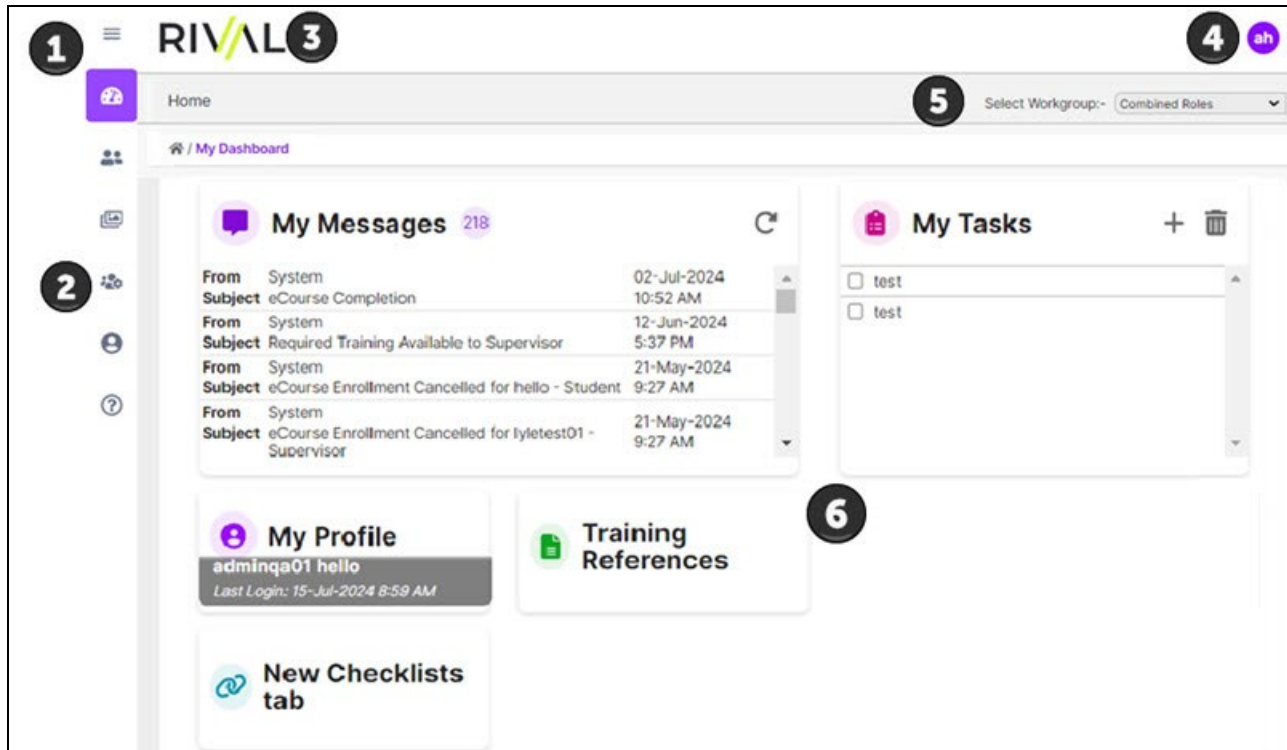
The Administration Portal is the administrative control center of the application. Administrative users of all types can use the portal to:

- Manage instructor-led training activities
- Create and manage online courses
- Manage content assets
- Manage the administrative functions of Rival Learn such as adding users and configuring notifications
- Manage online course offerings and training events
- Run reports on training activities

In this section

Administration Portal home page.....	58
User roles and workgroups	59
Searching for data	60
HTML Editor	61
Adding shortcuts to the home page	62

Administration Portal home page

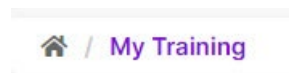


The Administration Portal home page opens after an administrator logs into Rival Learn. The page displays the Dashboard, which shows any messages that have been sent to the administrator and shortcut tiles that an administrator has set up.

	Name	Description
1	Hamburger menu	Toggle to expand or collapse the navigation bar. When collapsed, only icons are shown not text labels.
2	Navigation bar	Contains menu options to access pages to perform actions.
3	Header	Displays the Rival logo or a custom logo (if an administrator uploaded one).
4	User avatar	Avatar of the logged-in user's initials. If user has a special character as first letter of first or last name, a generic avatar  is shown. Tip: Click the avatar to see options to view/update your profile or log out.
5	Role selector	Select a role to see the tabs, sub tabs, and links associated with that Rival Learn role.
6	Shortcut tiles	Click a shortcut tile to perform a specific function.

Breadcrumbs

Breadcrumbs serve as a navigational aid so you can keep track of your location and maneuver easily.



User roles and workgroups

Two important aspects of the Administration Portal are user roles and workgroups.

User roles

Rather than lock users into predefined roles, Rival Learn allows the configuration of unlimited user roles. User roles allow individuals or groups of users to be assigned security permissions and data view restrictions. User roles adapt to the work that that user is required to perform.

Typical user roles are:

- Training Administrator
- Registrar
- Content Developer
- Instructor
- Student

Roles can be further segmented into finer user-roles, depending on the size and complexity of an organization. Other roles likely in a larger, more complex operation are:

- Supervisor
- Schedule Planner
- Department or Divisional Training Manager
- Qualifications and Certification

- eCommerce/Marketing Manager

Workgroups

Roles are defined as workgroups. Each workgroup can have one or more functions assigned as shortcuts, which can appear on the Administration Portal home page. Users can be assigned responsibility for (and access to) any function in the system such as adding users, registering students, creating courses, monitoring student progress, pulling reports, and so on.

Searching for data

On most pages in Rival Learn, you can easily search for data objects using filters and search criteria.

The page has two primary sections:

- Filters
- Search results table

Filters appear on the left side of the page under the Search button. You can enter search criteria in one or more search fields to limit the search. If you leave all the fields blank, all results are displayed.

Search results based on your search criteria appear in the Search Results table on the right side of the page. You can click on a column heading and sort in ascending or descending order.

Search criteria details

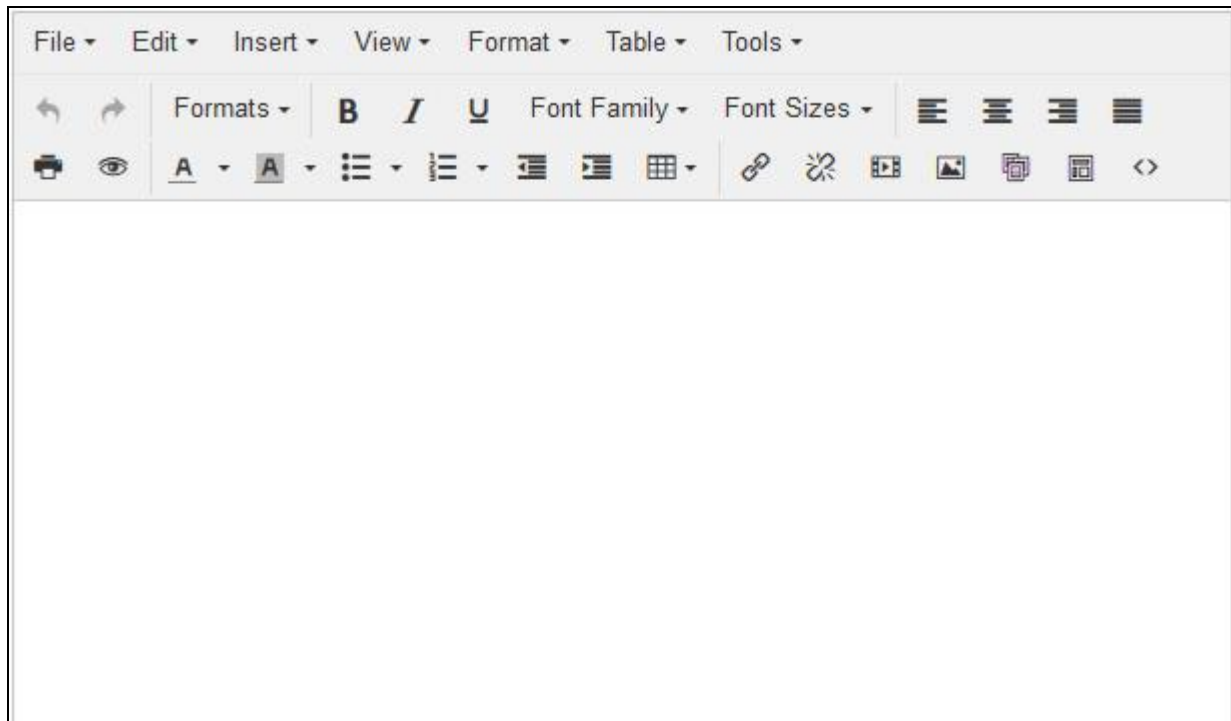
Enter search criteria in one or more search fields, then click **Search**, or press enter to initiate a search. If the search fields are left blank, everything in Rival Learn is displayed.

Rival Learn uses common SQL search process when searching the database. By default, Rival Learn returns any data containing the entered string in the filter. For example, entering the string "end" returns all data containing the word "end". Wildcard characters can be used to further narrow searches. For example, use the following wildcard characters to modify your search:

Wildcard character	Description
%	Any string of zero or more characters. For example: %r returns any data ending in "r" r% returns any data beginning with "r"
_	Any single character in a string. For example: _andy returns "Randy, Sandy, Mandyne", etc. _andy_ DOES NOT return "Randy or Sandy" but returns Mandyne
[]	Any single character within a specified range. For example: [a-f] Any single character within a set of values. For example: [acfq]
[^]	Any single character NOT within a specified range or set of values. For example: [^a-f] or [^acfq]

By default, Rival Learn wraps all text searches with %, unless the search text contains %. This means if users enter the string "vi", Rival Learn actually searches for %vi%. That is, Rival Learn returns anything that contains the string "vi". (e.g. David, Gavin, Levi, Ravi, Vivian would all be returned. Entering %vi instead would return anything ending with "vi". (e.g. only Levi and Ravi from the previous list).

HTML Editor



The Rival Learn HTML Editor is available in the following places:

- Content Authoring: HTML
- Content Templates: HTML
- Assignments
- Notifications

Key features of the editor:

- Improved support for HTML5 standard video playback from Rival Learn Media bank (MP4 recommended) and external sources (for example, YouTube)
- Menu bar for all operations
- Undo/Redo button
- Access to Media bank from context menu and insert drop down
- Preview button
- Path and status bar (in footer)
- Insert date/time feature (current date and time in one of several formats)
- Clear current document
- Dependencies available from drop-down menu
- Easily paste from Microsoft Word
- Select All function

- New Print button
- Insert Page Break function (for printing)
- View options
- Formatting options reconfigured (more intuitive)
- Improved table insert functionality

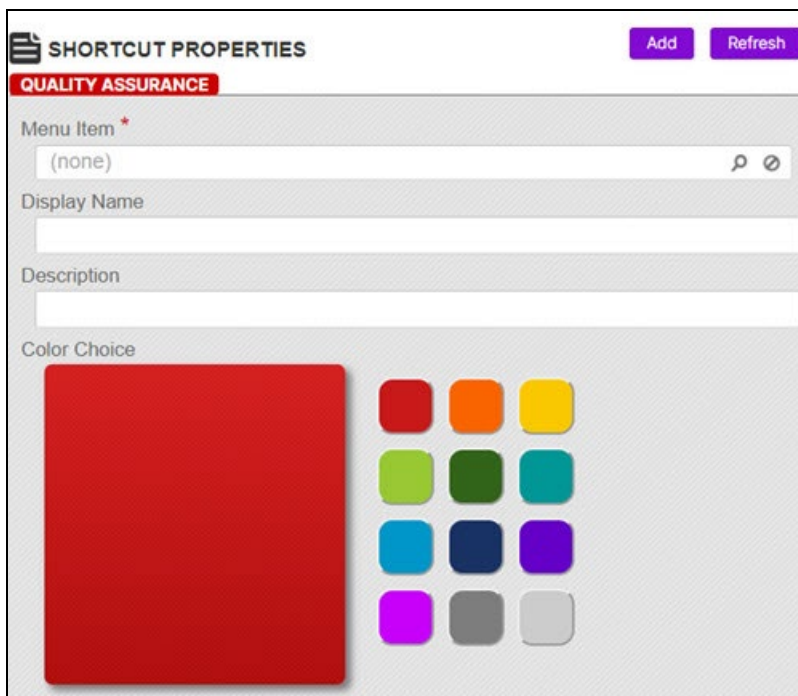
Adding shortcuts to the home page

- Administrators can add shortcut tiles to the home page.
- Shortcuts are used to access the pages most often accessed in the system. For example, an instructional designer may frequently upload media to the Media Bank. A shortcut can be added to the home page so that the designer only has to click once to access that page.

Note: You must have the required security settings to be able to complete this task.

1. On the Workgroup Properties page, from Shortcuts, click **Add**.

The Shortcut Properties page opens.



2. In the Menu Item box, search for and select a tab path.
3. In the Display Name box, type a name for the shortcut.
4. In the Description box, type a description for the shortcut title.
5. Select a display color.
6. Click **Save**.

The shortcut is now visible on the home page.

Analytics

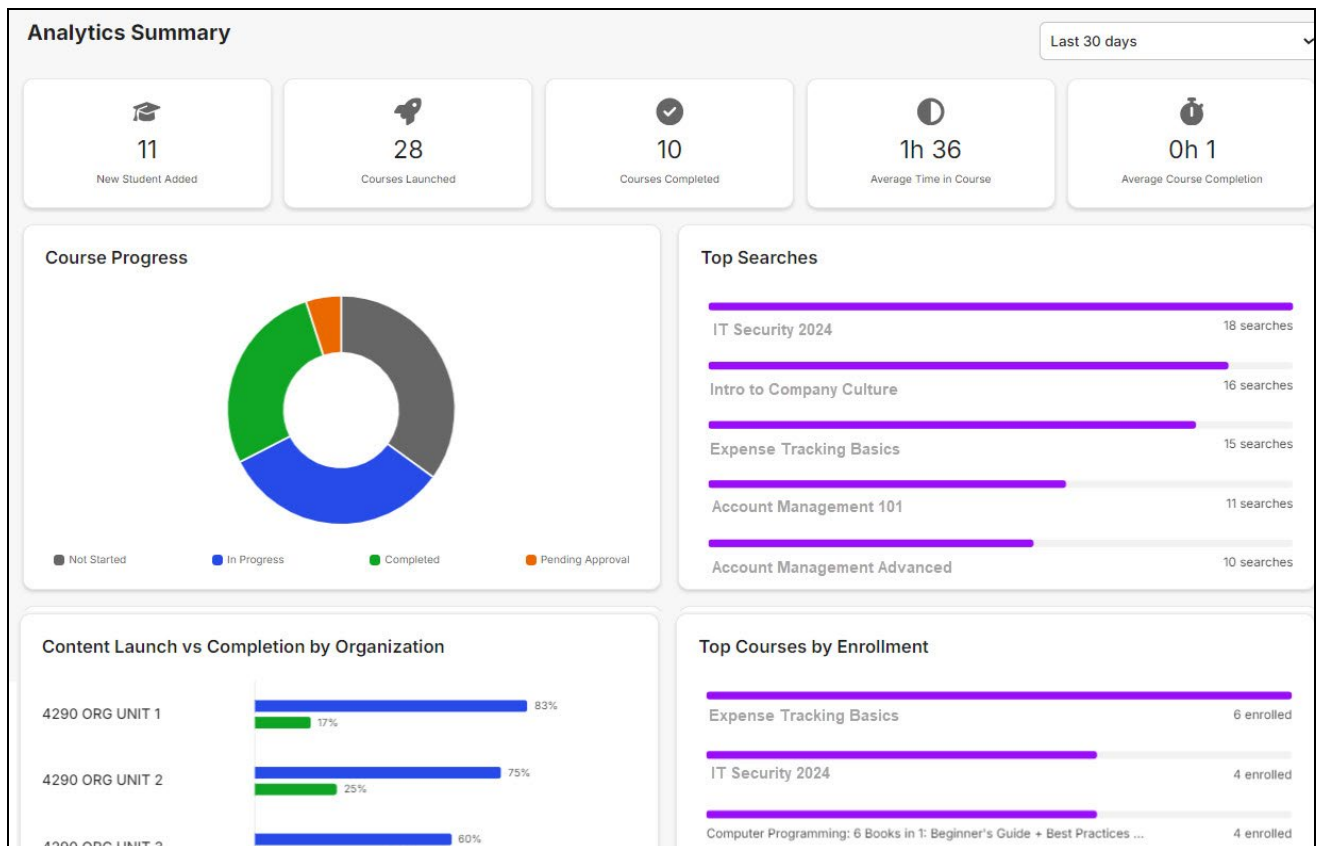
In this section

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Analytics Summary dashboard

The Analytics Summary dashboard provides quick access to the information you need to transform data into action. Quickly assess learning capabilities within your organization without diving into detailed reports. Data is presented as tiles and charts for "at-a-glance" efficiency.

The dashboard is not available by default. Administrator users must be **granted access** (see "**Grant access to the Analytics Summary dashboard**" on page 65).



Tiles and charts

Here's a summary of each tile and chart and what they do.

Tile	Description	Filter
New Students Added	Shows a count of all new students in Rival Learn during the time period selected in the Days filter.	Last 30 days (default) Last 90 days

Tile	Description	Filter
Courses Launched	Shows a count of all courses launched during the time period selected in the Days filter.	Last year Year to date
Courses Completed	Shows a count of all courses completed during the time period selected in the Days filter.	
Average Time in Course	Shows the average time in a course during the time period selected in the Days filter.	
Average Course Completion	Shows the average time it took students to complete courses during the time period selected in the Days filter.	
Chart	Description	Filter
Course Progress	Shows student progress in courses. The donut chart shows progress based on status: Not Started, In Progress, Completed, and Pending Approval.	Last 30 days (default) Last 90 days Last year Year to date
Top Searches	Shows the courses that students most frequently search for. The bar chart shows course name and number of times it was searched for.	
Content Launch vs Completion by Organization	Shows the percentage of content launched vs completed, broken down by organization. Useful for ensuring that organizations within your company have successfully launched content. The bar chart shows launched content (blue) and completed content (green).	
Top Courses by Enrollment	Shows the top courses based on enrollment so you can identify your organization's most popular courses. The bar chart shows the course name and number of students enrolled.	
Top Courses by Completion	Shows the top courses by completion so you can identify which courses are quickest to complete. The bar chart shows course name and number of students who completed it.	
Top Incomplete Courses	Shows the top courses that are incomplete. The bar chart shows course name and number of students who have not completed it.	

Grant access to the Analytics Summary dashboard

- Users do not have access to the **Analytics Summary dashboard** (on page 63) by default. They must be in a workgroup with assigned privileges to access.
 - Access can be granular at the tile/chart level.
1. From the navigation bar, click **Enterprise**.
 2. Under Admin, click **Workgroups**.
The **Workgroups page** (page 285) opens.
 3. Create a workgroup:
 - a. Click **Add**.
The **Workgroup Properties page** (page 286) opens.
 - b. Name the workgroup, for example *Analytics Summary Group*, and provide a description.
 - c. Select a status.
 - d. Select **Administrator** to create an administrator workgroup
 - e. Complete the remaining fields as appropriate.
 4. Add the administrator users you want to have access:
 - a. In the Administrators grid, click **Add**.
 - b. Select the admin users and click **Confirm**.
 5. Set the privileges:
 - a. Click **Security Settings**.
 - b. On the Workgroup Properties page, scroll down to the Analytics Summary section under Privileges.

- c. For the tiles/charts you want to grant access to, click the **View** checkbox:

WORKGROUP PROPERTIES

Privileges:

Clear

All

(select/unselect a section by clicking on the section title)

Analytics Summary

Tiles

View

Add

Edit

Delete

Author

Settings

Approve

New Student Added	☐	☐	☐	☐	☐	☐	☐
Courses Launched	☐	☐	☐	☐	☐	☐	☐
Courses Completed	☐	☐	☐	☐	☐	☐	☐
Average Time in Course	☐	☐	☐	☐	☐	☐	☐
Average Course Completion	☐	☐	☐	☐	☐	☐	☐
Course Progress	☐	☐	☐	☐	☐	☐	☐
Top Searches	☐	☐	☐	☐	☐	☐	☐
Content Launch vs Completion by Organization	☐	☐	☐	☐	☐	☐	☐
Top Courses by Enrollment	☐	☐	☐	☐	☐	☐	☐
Top Courses by Completion	☐	☐	☐	☐	☐	☐	☐
Top Incomplete Courses	☐	☐	☐	☐	☐	☐	☐

- d. At the top of the page, click **Add**.

6. On the Workgroup Properties page, click **Add**.

Access and view Analytics Summary

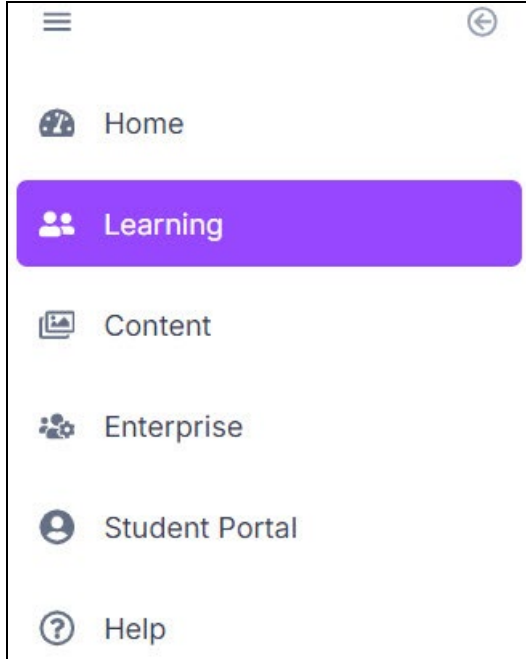
1. From the navigation bar, click **Analytics Summary**.

The **Analytics Summary dashboard** (on page 63) opens.

2. Click tiles, bar charts, adjust filters to view the data you want.

Manage and deliver training

The Learning module contains the tools to help you manage and deliver training.



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Plan

Students

Training managers can create and manage student training using Rival Learn. A training manager can add students through self-registration or through the HR import function. The HR import function is the most often the preferred method; however, users can also be created manually by privileged users.

Students page

Search

Clear

Login

Last Name

First Name

Employee ID/Reference

Status

Active

UserID

Email

Students

Search

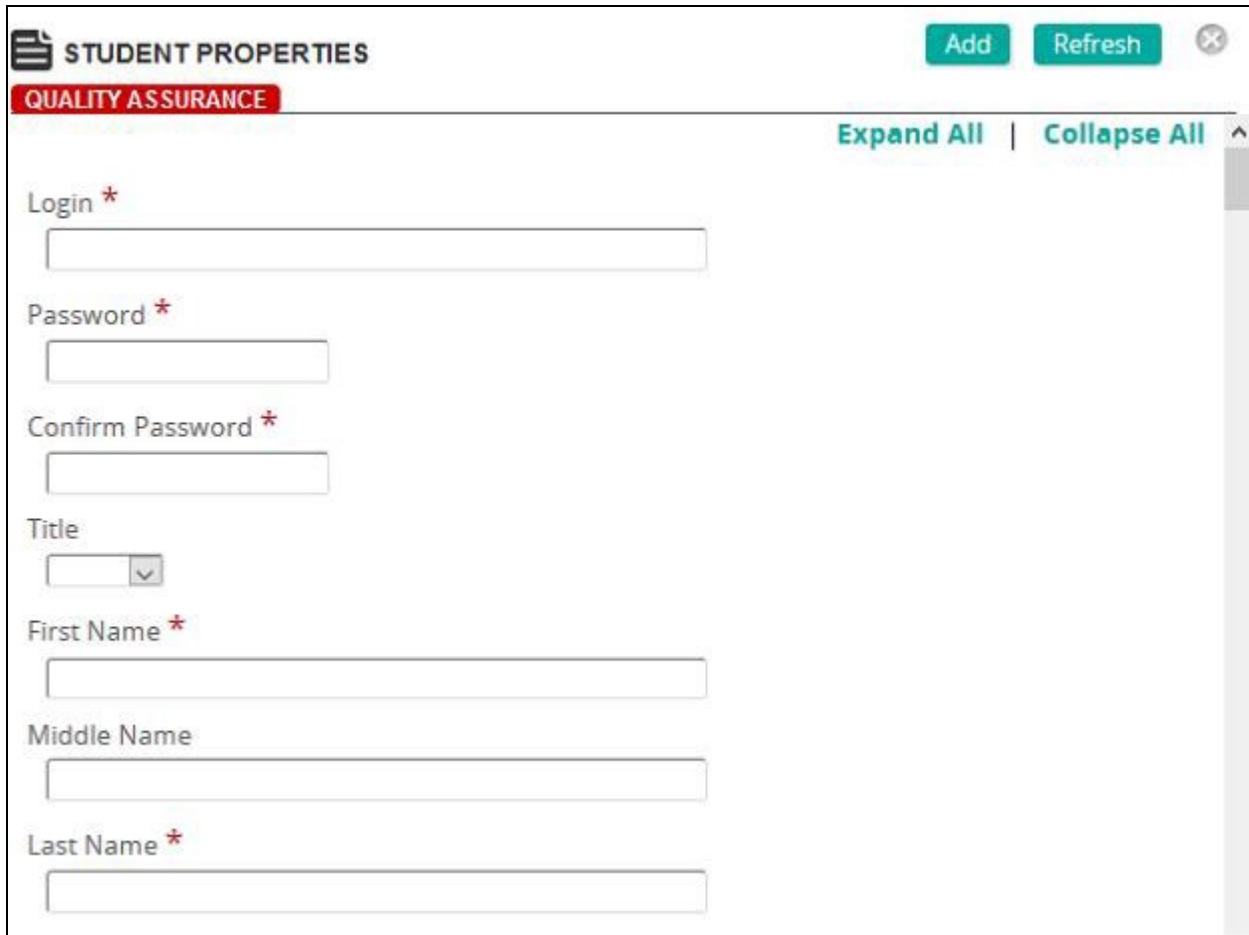
Add

Last Name +	First Name +	Login	Status	Job	
admin	admin	admin	Active		
Admin	Jeppesen	jeppesenadmin	Active		
Administrator	Local	Admin001	Active		
Armani	Lawrence	larmani	Active		
Avila	Alvaro	aavila	Active		
Baxter	Michael	michael	Active	Manager	
Bichon	Crystal	crystalb	Active		
Bichon	Dexter	dexter	Active		
Bitz	Cooper	coopbitz	Active		

The Students page shows the students available in Rival Learn. On this page, you can:

- Use the search function to find a specific student or students
- Add a student
- Access the Student Properties page to make changes to existing students
- Define the supervisor/subordinate relationship
- Delete a student

Student Properties page



The screenshot shows the 'STUDENT PROPERTIES' form. At the top right are 'Add' and 'Refresh' buttons. Below the title bar is a red 'QUALITY ASSURANCE' banner. To the right of the banner are 'Expand All' and 'Collapse All' links. The form fields are: 'Login *' (text input), 'Password *' (text input), 'Confirm Password *' (text input), 'Title' (dropdown menu), 'First Name *' (text input), 'Middle Name' (text input), and 'Last Name *' (text input).

On the Student Properties screen, you can create a student or modify the properties for an existing student.

Fields

Login: Student login ID. Login IDs are unique and are used to identify the student.

Password: Enter a password for the student.

Confirm Password: Re-enter the password.

Title: Titles available in drop down list.

First Name: Student first name.

Middle Name: Student middle name(s).

Last Name: Student last name.

Full Name: Student full name.

Email: Student email address.

Force Profile update on next login: Select this check box to automatically force a profile update when the user next logs in. Otherwise, leave the box unchecked.

User can edit profile: Select this check box to allow a user to edit his profile or leave the box unchecked to allow a user to edit his profile page.

Authentication

Use External Authentication: If you want to use external authentication, select this check box.

Force Password Change on next login: To force a password change for the user on the next login, select this check box.

Personal Development

Personal Qualifications: These are definitions based on a grouping of Interventions (eCourses, Training Activities, Assignments, or Exams), Competencies, and/or Requirements that are assigned to specific students.

Personal Development Plan: View the personal development plan for current student.

Preferences

Language Preference: The language the user prefers to use for communications.

Correspondence Preference: The default will be the setting chosen for correspondence in company settings. Any other choice in the Student Properties sheet overrides the company setting.

Email Format: The default email format. The options are:

- (use default): Pulls in the default email format that is set on the Company settings page (Default Email Format setting) and renders email accordingly.
- HTML: Renders email as HTML text.
- Plain Text: Renders email as plain text.

Allow Unsolicited Email: Place a check mark in the check box to allow the student to receive unsolicited email. This is used to store user preference. This is primarily used by customers using eBusiness and communicating with external users.

Organizational

Employee ID/Reference: Type a unique identifier for the user.

Job: The student may be linked to a job specified in Rival Learn (**Enterprise >Organization>Jobs**).

Position Number: The position number is used to identify the position of the student.

Position Title: The title of the student's position.

Reports To Position: This is the position number that this position normally reports. Reports To Position has been replaced by the Supervisor function. See Supervisor for more information about defining a Supervisor/Subordinate relationship for student users in Rival Learn.

Org Unit: You can assign the student to an organization unit if organization units have been established in Rival Learn. Once assigned, you can direct training to a particular organization unit so that all students in that organization unit receive the training.

Note: If you change a student's org unit, the student's learning history is tracked and goes with him to the new organization unit.

If an individual is transferred from one organization unit to another, the Learning History of that individual is tracked and new training is assigned based on the qualifications applied to the new organization unit.

Start Date: Click the box or calendar icon to select a start date. This date is typically the date the user is added in Rival Learn.



Termination Date: If the user no longer needs access to Rival Learn (such as when terminating employment), click the box or calendar icon to select a termination date.

Initial Qualification Effective Date: To control when qualifications will be effective for a specific student. Setting Initial Qualification Effective Date as a future date means Qualifications can be configured and students created in the system before making Qualifications effective. When the future date arrives, all Qualifications for the student will become effective.

Cost Center: Associate a cost center with the student.

Category: Associate a category with the student. A category must first be created before it can appear in the drop down list.

Status: Select **Active** or **Inactive**. A user that is inactive in Rival Learn cannot access any information. A student that is inactive in Rival Learn cannot access any information; however, their entire training history is maintained.

Status Description: Type any additional information to describe the user's status such as retired, on leave, and so on.

Groups: Defines what Group(s) the student is assigned to. A student group must be created before it can be added in the Student properties. The Add button opens the Student Groups list window where you can search for and select the student group or groups to which the student must belong.

Supervisors: Defines a list of supervisors for the student user. The Add button opens the Users list window where you can search for and select supervisors for the student. The Remove Selected button removes the selected supervisor from the list. The Mark All button marks all the supervisors in the list so you can remove them.

Subordinates: Defines a list of subordinates for the student user. The Add button opens the Users list window where you can search for and select subordinates for the student. The Remove Selected button removes the selected subordinates from the list. The Mark All button marks all the subordinates in the list so you can remove them.

Membership Dates: Click to view the Membership Dates Properties page where you can view the memberships this student has and the dates the memberships began.

Contact Information

Enter any additional contact information if required.

Personal Information

Birthdate: Click the box or calendar icon to select the user's birthday from a calendar pop-up.

Gender: Select the user's gender from the list.

Image: Select an image of the student and upload it.

Billing Information

Billing information for the student may be required if the student is being invoiced for courses through the eCommerce section of Rival Learn.

eCommerce

eCommerce settings allow for customized transactions through the eCommerce section of Rival Learn. (See the *eBusiness Management Guide* for detailed information on each setting.)

Custom Data Fields

Custom data fields appear in this section.

CTC Certification: Select Yes or No.

Demographics

Home Email: The student's home email.

Employment Status: The student's employment status.

Mobile (cell) Phone: The student's cell phone number.

Add a student

1. From the navigation bar, click **Learning**.

2. Under Plan, click **Students**.

The **Students page** (page 68) opens.

3. Click **Add**.

The **Student Properties page** (page 69) opens.

4. Type a login ID and password for the student.

5. Type the student's first name, last name, and an email address.

6. Check the box(es) to give the student the ability to edit their own profile or force the student to update their profile.

7. Complete any additional fields as needed.

8. Click **Add**.

The user is added to Rival Learn as a student and can now access the Student Portal.

9. Click .

Change a password

1. From the navigation bar, click **Learning**.

2. Under Plan, click **Students**.

The **Student page** (page 68) opens.

3. Enter the filter criteria for a specific student, then click **Search** or leave all the filter criteria blank and click **Search** to display a list of all students.

4. In the list beside a student, click  and then click **Properties**.

The **Student Properties page** (page 69) opens.

5. From **Password**, click **Change Password**.

The Edit Password window opens.

6. Type a new password and then confirm it.

7. Click **Submit**.

Configure new users

The Initial Qualification Effective Date can be used to pre-configure your Rival Learn site prior to releasing training to a group of students. During implementation, or prior to releasing to a new group of users,

setting the Initial Qualification Effective Date for a student or Group of students provides a method to control when all user qualifications become effective.

When a Qualification becomes effective it is controlled by the latest date for any student membership based on when they became a member of the Qualification. The latest date of the Initial Qualification Effective Date or the 6 **membership dates** (see "**Edit membership dates for any qualification membership**" on page 78) determines when the Qualification will be effective:

Student Group	The date the student became a member of the Student Group
Job	The date the student became a member of the Job
Job Category	The date the student became a member of the Job Category
Organization Unit	The date the student became a member of the Organization Unit
Qualification	The date the student became a member of the Qualification because of Individual inclusion
Qualification Effective Date	The date that the certification within the Qualification is to take effect.
Initial Qualification Effective Date	The date set in the Student Properties for "Initial Qualification Effective Date" either manually in the interface or through an HR import.

Supervisor Subordinate Relationship

Defining a supervisor relationship in Rival Learn provides the ability to automate how users view data and how users are notified by the system. To take advantage of this function, you must first configure your site so your data defines the relationships between users in terms of a Supervisor/Subordinate relationship.

To use the Supervisor functionality, the first step is to define the Supervisor/Subordinate relationship for all users. There are two ways to define this relationship:

- Manually, using the interface in each Student Property sheet
- Automatically, by defining up to five Supervisors as part of your HR Import mapping

Define the supervisor/subordinate relationship manually

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Students**.

The **Student page** (page 68) opens.

3. Click **Add**.

The **Student Properties page** (page 69) opens.

4. For **Subordinates**, click **Add**.
5. From the Users window, enter the filter criteria for a specific student, then click **Search** or leave all the filter criteria blank and click **Search** to display a list of all students.
6. Select the check box of one or more users then click **Confirm**.

Define the supervisor/subordinate relationships using HR Import Definition

Defining the Supervisor/Subordinate relationship using the HR Import requires defining a mapping file to define up to five supervisors per user. The EMP ID reference for each user is the data value used to identify the Supervisor.

Rival Learn continues to support the Reports To Position Title and References fields, but Supervisor data now replaces this data for Reporting and Supervisor Notifications. Any existing custom reports using the Reports To Position data will no longer display this data and must be modified to use the Supervisor data fields.

Supervisor Data View Restrictions

Administrator workgroups provides the ability to restrict members to only be able to view subordinate data.

This Data View Restriction setting provides the ability to set restrictions to either all subordinates, or immediate subordinates.

Setting Data View Restrictions to All subordinates means supervisors may see user data for all subordinates in the Supervisor hierarchy defined company-wide. Selecting Immediate means supervisors may only see user data for their immediate subordinates.

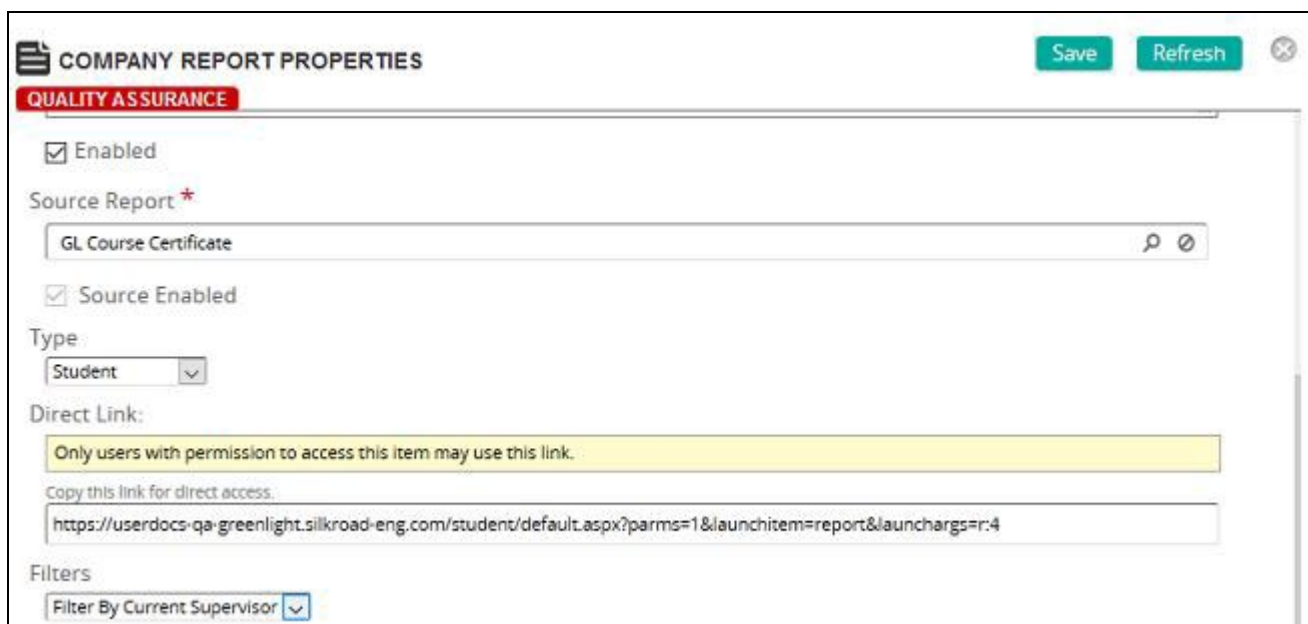
Supervisor Reports

The ability to filter a Student Report using the Supervisor Subordinate relationship can be defined in the Company Reports function. A Company Report definition can define a Student report that only appears for users with a Supervisor role and will automatically filter data based on this relationship.

You can also filter data by all or immediate subordinates combined with a specific user. When selected, the data returned in the report is filtered based on the combination of the subordinate and supervisor filters set for the report.

Data restrictions are automatically assigned to all supervisors regardless of whether they have an Admin role or not.

A student type Company Report can be defined to use "Filter By Current Supervisor". These reports only appear in the Student Reports area in the Student Portal.



The screenshot shows the 'COMPANY REPORT PROPERTIES' form for a report named 'QUALITY ASSURANCE'. The form includes the following fields and options:

- Enabled:** A checkbox that is checked.
- Source Report:** A dropdown menu showing 'GL Course Certificate'.
- Source Enabled:** A checkbox that is checked.
- Type:** A dropdown menu showing 'Student'.
- Direct Link:** A text area containing the message 'Only users with permission to access this item may use this link.' Below this is a text box with the URL: `https://userdocs-qa-greenlight.silkroad-eng.com/student/default.aspx?parms=1&launchitem=report&launchargs=r:4`.
- Filters:** A dropdown menu showing 'Filter By Current Supervisor'.

At the top right of the form are 'Save' and 'Refresh' buttons, and a close button (X).

Student groups

Student groups provide a way for you to group students who have common training needs into a manageable unit so training can be directed to them.

For example, let's say several people from different areas of your company are going to act as safety coordinators. They will be responsible for ensuring that safety policies and procedures are implemented and followed. A student group is a great way to group these employees so that training can be assigned.

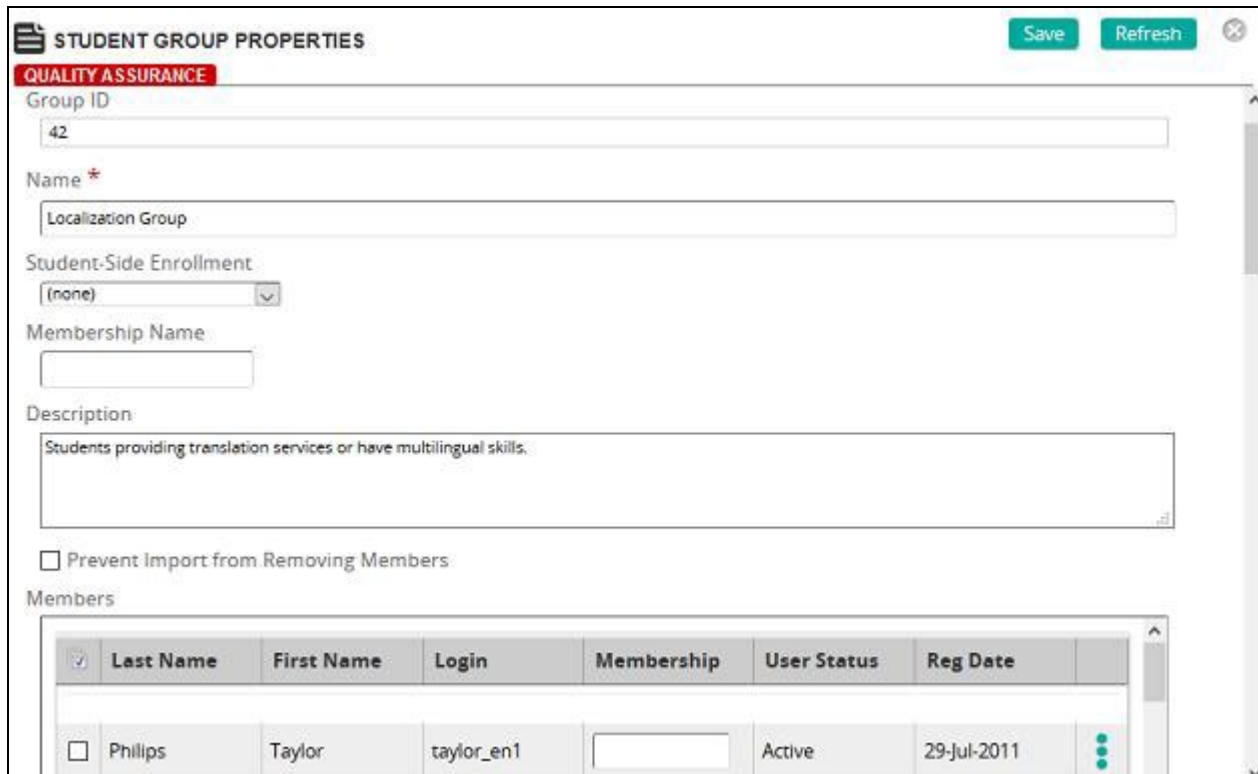
Student Groups page

Search		Clear		Student Groups				Search	Add
Name									
Billing Group									
Categories									
Name	Student-Side Enrollment	Approval Required	Total Members	Total Pending	Members Removed by Import				
**Customer 1	Registration Code Required	No	1	0	Yes				
**Customer s	Automatic (Public Group)	No	9	0	Yes				
**Distributors	Self Enrollment Allowed	No	1	0	Yes				
**First Aid	(none)	No	0	0	Yes				
Jeppesen Test Students	(none)	No	3	0	Yes				
Localization Group	(none)	No	11	0	Yes				
Lunch-n-Learn Monthly	Self Enrollment	No	0	0	Yes				

The Student Groups page shows the student groups available in Rival Learn. On this page, you can:

- Use the search function to find a specific student group or group
- Add a student group
- Access the Student Group properties page to make changes to existing student groups
- Delete a student group

Student Group Properties page



On the Student Group Properties page, you can create a student group or modify the properties of an existing one.

Fields

Name: The name for the student group.

Student-Side Enrollment: Select one of the following:

- **(none)** to use the group as an Administrator only enrollment.
- **Automatic (Public Group)** when Students may self-enroll, but are automatically enrolled in this group. No approval is required to enroll in a Public Group.
- **Self-Enrollment Allowed** when students may self-enroll in this group by selecting it from a list of Self Enrollment groups that appears in the Student Profile page. Self-Enrollment groups have optional additional criteria set for the group:
 - **Membership Student Entry Required** to require new users to enter a membership code or name prior to enrollment. Enter a membership field name to be displayed in the Student profile page.
 - **Approval Required** to automatically add users to a group waiting list prior to enrollment. Only Administrators with privilege may approve enrollments
- **Registration Code Required** when students may self-enroll, but must enter an authorization code in the Student Profile page. A registration code must be entered for all Registration Code Required groups. Only after entering this code will new users be allowed enrollment in this group. Registration Code Required groups have optional additional criteria set for the group:
 - **Membership Student Entry Required** to require new users to enter a membership code or name prior to enrollment. Enter a membership field name to be displayed in the Student profile page.

- **Approval Required** to automatically add users to a group waiting list prior to enrollment. Only Administrators with privilege may approve enrollments.

Membership Name: Specify a membership name for the student group.

Description: Specify a description for the student group to make it easier to find in searches.

Prevent Import from Removing Members: Select this check box to prevent the import function from removing student memberships. This maintains group membership and prevents the Rival Learn import function from removing members from the student group automatically. Otherwise, leave it unchecked (the default setting) so students will be removed by import if the Group Name is not specified.

Members: Shows the members in the student group. Click **Add** to add members to the student group, **Remove Selected** to remove the selected members from the student group, or **Mark All** to mark all the members for removal.

Pending Members: Shows pending members eligible for inclusion in the student group. Click **Accept** to accept a member into the group or click **Reject** to reject the membership.

Profit Sharing

Complete fields in this section as needed.

Billing

Complete fields in this section as needed.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Cost Center: To assign a cost center or centers, click  to search for and select cost centers from the Cost Centers page.

Comments: Enter any free-text comments about the student group.

Create a student group

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Student Groups**.

The **Student Groups page** (page 75) opens.

3. Click **Add**.

The **Student Group Properties page** (page 76) opens.

4. Enter the appropriate group properties information.
5. Select the **Prevent Import from Removing Members** check box to prevent the import function from removing student memberships.

This maintains group membership and prevents the Rival Learn import function from removing members from the student group automatically. The default is set to off, so students will be removed by import if the Group Name is not specified.

6. Click **Add**.
7. Click .

Add students to a student group

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Student Groups**.

The **Student Groups page** (page 75) opens.

3. Enter the filter criteria for a specific student group, then click **Search** or leave all the filter criteria blank and click **Search** to display a list of all student groups.
4. In the list beside a student group, click  and then click **Properties**.

The **Student Group Properties** (page 76) page opens.

5. From the Members list, click **Add**.
6. Enter the filter criteria for a specific student, then click **Search** or leave all the filter criteria blank and click **Search** to display a list of all students.
7. From the list of students, select the check box of one or more students.
8. Click **Confirm**.
9. From the Student Group Properties window, click **Save**.

Note: The student group may also have pending members if approval is required Refer to **Set up student side enrollment** (on page 78).

Edit membership dates for any qualification membership

- Individual membership dates for any Qualification membership criteria can be modified for individual student users in their Student Properties.
1. From the navigation bar, click **Learning**.
 2. Under Plan, click **Students**.

The **Students page** (page 68) opens.

3. Enter the filter criteria for a specific student, then click **Search** or leave all the filter criteria blank and click **Search** to display a list of all students.
4. In the list beside a student, click  and then click **Properties**.

The **Student Properties page** (page 69) opens.

5. Under Organizational from Membership Dates, click **Edit**.

Note: Recertification due date calculations are based on the certification mastery date.

6. On the Membership Dates Properties window, edit any or all membership dates, then click **Save**.
7. From the Student Properties window, click **Save**.

Set up student side enrollment

Student groups can be set up to allow student side enrollment. Use the Student Side Enrollment function to do this.

When setting up student side enrollment groups, demographic fields must be defined that expose Student property fields to the Student Profile page. Although the profile may contain any Student property field, the LOGIN ID and PASSWORD fields must be created as a minimum.

To set up student side enrollment, perform the following:

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Student Groups**.

The **Student Groups page** (page 75) opens.

3. Enter the filter criteria for a specific student group, then click **Search** or leave all the filter criteria blank and click **Search** to display a list of all student groups.
4. In the list beside a student group, click  and then click **Properties**.

The **Student Group Properties** (page 76) window opens.

5. From the Student-Side Enrollment drop-down box, select an option.
6. Click **Save**.

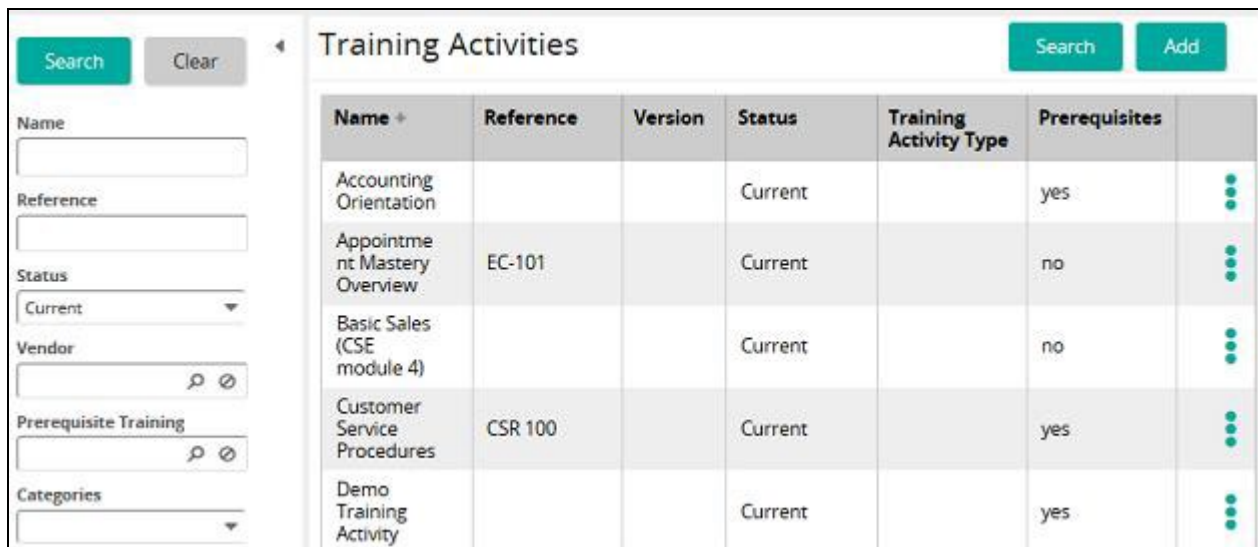
Training activities

Training activities are activities provided to Students as offline, classroom-based training. They are instructor led.

Training activities can be scheduled or unscheduled. A scheduled activity is a known as a training event, which occurs at a specific time and place.

Any custom field created as a User Training Activity Records custom field will also appear in the associated Training Events when an assessment record is created or modified for either a training activity or a training event.

Training Activities page



The screenshot shows the 'Training Activities' page. On the left is a sidebar with filters: Name (text input), Reference (text input), Status (dropdown menu with 'Current' selected), Vendor (text input with search and clear icons), Prerequisite Training (text input with search and clear icons), and Categories (dropdown menu). The main area has a table of training activities. The table has columns: Name, Reference, Version, Status, Training Activity Type, Prerequisites, and a three-dot menu icon. The table contains five rows of data.

Name	Reference	Version	Status	Training Activity Type	Prerequisites	
Accounting Orientation			Current		yes	
Appointment Mastery Overview	EC-101		Current		no	
Basic Sales (CSE module 4)			Current		no	
Customer Service Procedures	CSR 100		Current		yes	
Demo Training Activity			Current		yes	

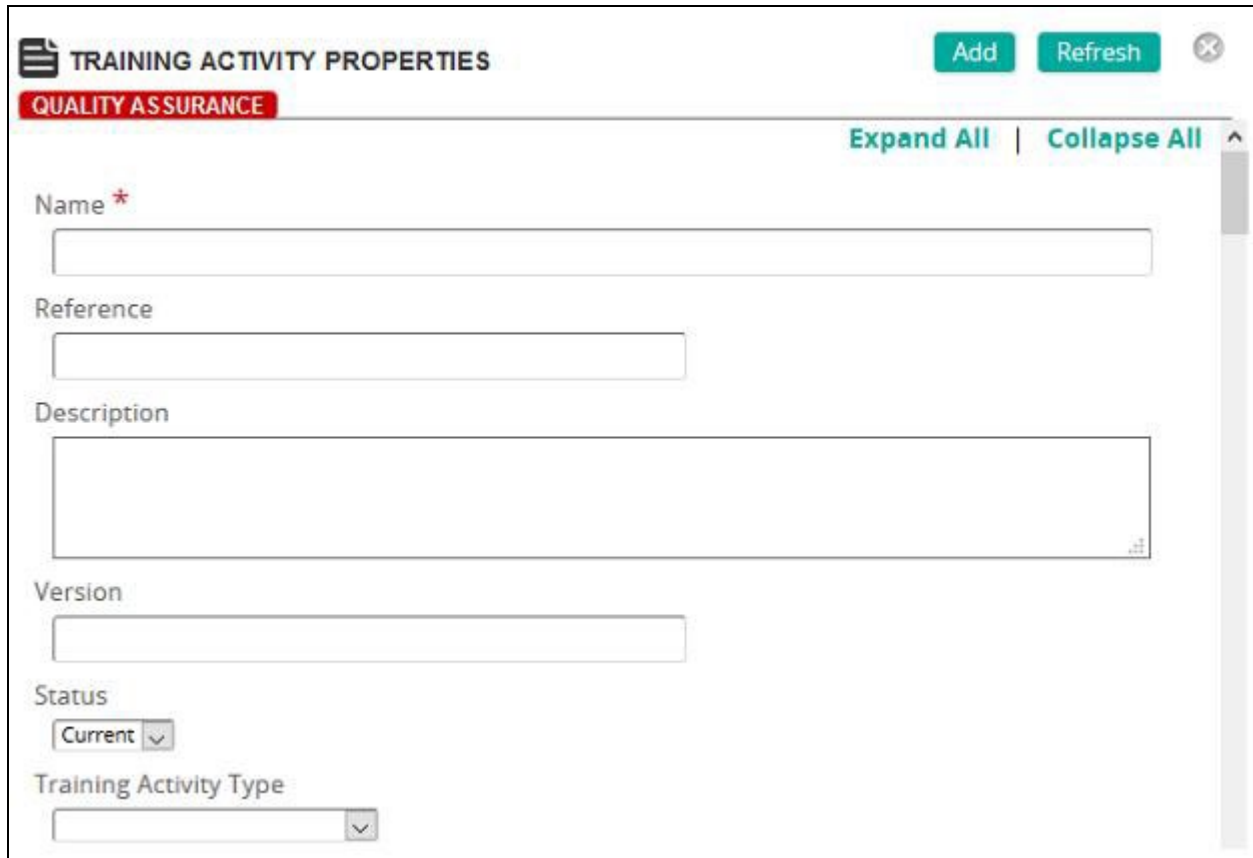
The Training Activities page shows the training activities available in Rival Learn. You can use the search function to find a specific activity or activities.

On this page, you can:

- Use the search function to find a specific activity or activities
- Add a training activity

- Access the Training Activity Properties page to make changes to existing training activities
- Delete a training activity

Training Activity Properties page



The screenshot shows the 'TRAINING ACTIVITY PROPERTIES' page. At the top right are 'Add' and 'Refresh' buttons. Below the title is a red 'QUALITY ASSURANCE' banner. To the right of the banner are 'Expand All' and 'Collapse All' links. The form fields are: 'Name *' (text input), 'Reference' (text input), 'Description' (text area), 'Version' (text input), 'Status' (dropdown menu with 'Current' selected), and 'Training Activity Type' (dropdown menu).

On the Training Activity Properties page, you can create a training activity or modify an existing one.

Fields

Name: The name of the activity.

Reference: Type a descriptive phrase if you want to be able to search by reference.

Description: Type a description of the activity. The description appears below the training activity name on the Course Schedule and My Training page in the Student portal.

Version: The version number for the training activity. The version number is attached to the user record when a training activity record is created in Rival Learn for reporting purposes.

Status: Select Current or Legacy to identify the status of the activity. The default value is Current.

Note: Only training activities of Current status are automatically searched when searching training activities. To view training activities with Legacy status, the status field must be explicitly set to either Legacy or Legacy and Current.

Training Activity Type: Select the training activity type as defined in the Training Activity list under Configuration/Settings.

Certification Type: Select the certification type used to determine any certification, recertification and/or mastery requirements for the activity.

Grading Type: Select the type of grading system to use to assess the activity. Grading types can be customized. Percentage and Complete/Incomplete are the default types.

Default CEUs: If a training activity requires continuing education units (CEUs), type it here.

Default CEU Reference: Type the CEU reference, which is typically the CEU unit field, for example 5 hours, 10 credits, and so on.

Notes: Type any notes about this training activity.

Objectives: Type the objectives for the training activity.

Outline: Type the course outline.

Prerequisites

Prerequisites Training: If a training activity has any prerequisites, they appear here. Prerequisites control what must be completed before students can complete the training activity. Prerequisite requirements prevent adding from the training catalog or enrolling in events of activities with non-mastered requirements. Prerequisites also prevent launching any mandatory online training.

Click **Add** to add a prerequisite, click **Remove Selected** to remove selected prerequisites, and click **Mark All** to mark all prerequisites for removal from the Prerequisite Training grid.

Allow Training Event Enrollment without Prerequisite Mastery: This is a preset for all training events created from the training activity. If selected, students are allowed to enroll in any training events even when they have NOT MET all the prerequisites.

Prerequisite Note: Type any prerequisite information for the activity.

Cancellation Policy: Type a generic cancellation policy for the activity.

Target Audience: Type any target audience information.

Associated Survey: If applicable, assign a default Rival Learn survey to the training activity. The survey can be used to evaluate any training events or training event groups created for this training activity. Associated surveys are for data reporting purposes only. Survey data must be entered manually for each training event, but can then be reported based on a filter using either the survey or training activity association. Surveys can only be completed online if they are part of an eCourse definition.

Location & Contact Information

Event Type: In the drop-down list, select one of the following:

- Classroom Training
- Online Virtual Event
- Cisco WebEx
- Citrix GoToMeeting/GoToWebinar
- Microsoft Office Live Meeting
- Adobe Connect

Administrator Name: Type the name of the course administrator.

Administrator Email: Type the email of the course administrator.

Schedule

Is a Scheduled Activity: Do one of the following:

- Leave unchecked if the training activity takes place at a vendor external to the enterprise where no scheduling of internal resources is required.
- Check (select) this check box if the training activity takes place somewhere within the enterprise (venue or training location) where scheduling of resources is required.
- Selecting this option also displays the Scheduling Rules and Venues grids where you select any scheduling rules and venues for the training activity.

Enrollments

The information in this section is used to automate student waiting list management or provide reference data to help administrators make decisions about training events created from defined training activities.

Minimum Enrollments: Type the minimum number of students to run or cancel a course.

Maximum Enrollments: Type the maximum number of students allowed to enroll in a course. Students enrolling after the maximum enrollment setting has been reached are automatically added to the waiting list for the event.

Note: Leaving this field empty means no maximum is set for the event. All students will be added to the enrollment list for the event. Entering 0 (ZERO) in this field means that all students will be added to the waiting list for the event.

Enrollment Cut-off: Type the number of days before a course to stop automatic enrollments. Students enrolling on or after this date are automatically added to the waiting list for the event.

Student May Cancel Training Event Enrollment: Select this check box to allow the student to cancel enrollment in the course.

Cancellation Cut-off: Type the number of days students can no longer cancel enrollment to help administrators determine whether a cancellation penalty will be imposed.

Cancellation Penalty: Type the percentage of the cancellation penalty if any.

Absentee Penalty: Type the percentage of the absentee penalty if any.

Enrollment Approval Required: Select this check box if approval is required before enrollment.

Allow User Registration by Supervisors: If this check box is:

- Selected, supervisors can enroll users in the training activity in Rival Learn. And, if you are using Rival Learn and Rival WingSpan integration, the training activity is published to Rival WingSpan.
- Not selected (not checked), supervisors cannot enroll users in the training activity in Rival Learn, and the training activity is not published to Rival WingSpan.

Tip: For more information about Rival WingSpan and Rival Learn integration, refer to the Rival WingSpan Administrator Guide.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list. **Languages:** To assign languages, click a language or languages from the Available list and use the arrow buttons to move them to the Assigned list. **Cost**

Center: To assign a cost center or centers, click  to search for and select cost centers from the Cost Centers page.

Vendor: To associate a vendor or vendors, click **Add** and then search for and select vendors.

Materials: Training activities can have one or more associated materials. Instructors and students can access and download materials. Materials can be Content Objects or Media Elements.

Instructors access materials from their My Teaching homepage. Students view attached materials from the Training Details page, Course Catalog, or their Personal Development Plan.

Training activity material of type Content Object can be made available to the instructor and student home page. Material of type Media may be made available to the instructor, student or both. For example, a Content Object can consist of CAI (Computer Aided Instruction) material that is to be used by an instructor; a Media Element might be a PDF Student Study Guide used by a student.

Materials displayed under a TA are alphabetized and assigned media items are displayed.

Click **Add** to display the Materials Properties page to select materials.

Links: To add training activity links, click **View Links** and then select a link type to view a list of links for each. The link types are:

- Prerequisites
- Qualifications
- Content Objects
- Competencies

Add a training activity

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Activities**.

The **Training Activities page** (page 79) opens.

3. Click **Add**.

The **Training Activity Properties page** (page 80) opens.

4. Type a name for the training activity.
5. Select the training activity type.
6. Complete additional fields as appropriate.
7. Click **Add**.

The training activity is added to Rival Learn.

Add a certification type to a training activity

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Activities**.
3. Search for and select the training activity you want.

The **Training Activity Properties page** (page 80) opens.

4. From the Certification Type drop-down list, select the certification type used to determine any certification, recertification and/or mastery requirements for the activity.
5. From the Grading Type drop-down list, select the type of grading system used to assess the activity.
6. Click **Save**.

Add Continuing Education Credits to a training activity

1. From the navigation bar, click **Learning**.

2. Under Plan, click **Training Activities**.
3. Search for and select the training activity you want.

The **Training Activity Properties page** (page 80) opens.

4. In the Default CEUs text box, type the default Continuing Education Units credit for each training activity.
5. In the Default CEU Reference text box, type the default CEU reference for each training activity.
6. In the Objectives text box, type the objectives for the activity.
7. In the Outline text box, type the course outline.
8. Click **Save**.

Add prerequisites to a training activity

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Activities**.
3. Search for and select the training activity you want.

The **Training Activity Properties page** (page 80) opens.

4. From Prerequisite Training, click **Add** to search and select one or more courses. The Courses window opens.
5. Click **Search** or filter the search by typing additional information into the filter text boxes.
6. Select the check box of one or more courses, and click **Confirm**.

Tip: To view the course properties, click the **Prerequisite Properties** icon.

7. Select the **Allow Enrollment without Prerequisite Mastery** check box. This is a preset for all training events created from the training activity. When selected (checked), students will be allowed to enroll in any training events even when they have NOT MET all the prerequisite courses.
8. In the Prerequisite Notes text box, type any prerequisite information for the activity.
9. Click **Save**.

Add a cancellation policy/target audience to a training activity

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Activities**.
3. Search for and select the training activity you want.

The **Training Activity Properties page** (page 80) opens.

4. In the Cancellation Policy text box, type a generic cancellation policy for the activity.
5. In the Target Audience text box, type any target audience information.
6. Click **Save**.

Associate a survey to a training activity

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Activities**.

3. Search for and select the training activity you want.

The **Training Activity Properties page** (page 80) opens.

4. From the Associated Survey box, click **Select**.
5. From the Surveys window, search for the survey to be included with the activity.
6. Select the check box of one or more surveys then click **Confirm**.
7. Click **Save**.

Add location & contact information to a training activity

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Activities**.
3. Search for and select the training activity you want.

The **Training Activity Properties page** (page 80) opens.

4. In the Event Type drop-down list, select one of the following:
 - Classroom raining
 - Online Virtual Event
 - Cisco WebEx
 - Citrix GoToMeeting/GoToWebinar
 - Microsoft Office Live Meeting
 - Adobe Integration Platform
5. (If applicable) Specify an administrator name and email.
6. (If applicable) Specify list prices and instructional time.
7. Click **Save**.

Associate vendors to a training activity

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Activities**.
3. Search for and select the training activity you want.

The **Training Activity Properties page** (page 80) opens.

4. From the Vendors window, perform one of the following:
 - In the Name text box type the name of the vendor then click **Search**.
 - Leave the Name text box blank and click **Search**.
5. Select the check box next to the vendor and click **Confirm**.
6. Click **Save**.

Add materials to a training activity

- Material is anything that enhances the learning experience. It can be a content object or media.

- You can associate material with a training activity. Students can then access materials in the Student Portal.
- Student access to material can be restricted or not.

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Activities**.
3. Search for and select the training activity you want.

The **Training Activity Properties page** (page 80) opens.

4. From the Materials section, click **Add**.

The Materials Properties page opens.

5. From the Type drop-down box, select:
 - **Content Object** to select a content object as material
 - **Media** to select media from the Media/Asset Bank as material

Depending on the selection, the Material Properties window displays different options.

6. In the Content Object or Media list, click  to search and select material.

Tip: For content object type, you can also set the Instructor and Student skins.

7. In the Student Access list, select when (if) a student can access the training material:
 - **None:** Training material is associated with training activity but the student cannot access it.
 - **Unrestricted:** Training material is available to student at any time.
 - **At session start:** Training material is available to student when the training event (session) occurs.
 - **After session:** Training material is available to student after the training event (session) ends.
 - **Instructor set:** Training material is available when the instructor unlocks it.
8. (If applicable) Set the assigned language for the training material.
9. (If applicable) In the Notes box, enter any addition information about the training material. This information appears below the training material link on the Course Schedule page.
10. Click **Add**.
11. Click **Save**.

View training activity links

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Activities**.
3. Search for and select the training activity you want.
4. The **Training Activity Properties page** (page 80) opens.
5. Under Links, click **View Links**.
6. From the Links for drop-down box, select **Prerequisites, Qualifications, Content Objects, or Competencies** to view a list of links for each.

7. Click **Close**.
8. Click **Add**.
9. Click **Save**.

Training events

Training events are specific instances of a training activity scheduled for a specific time and place. Training events appear in the Course Catalog. Students can view and enroll in them there.

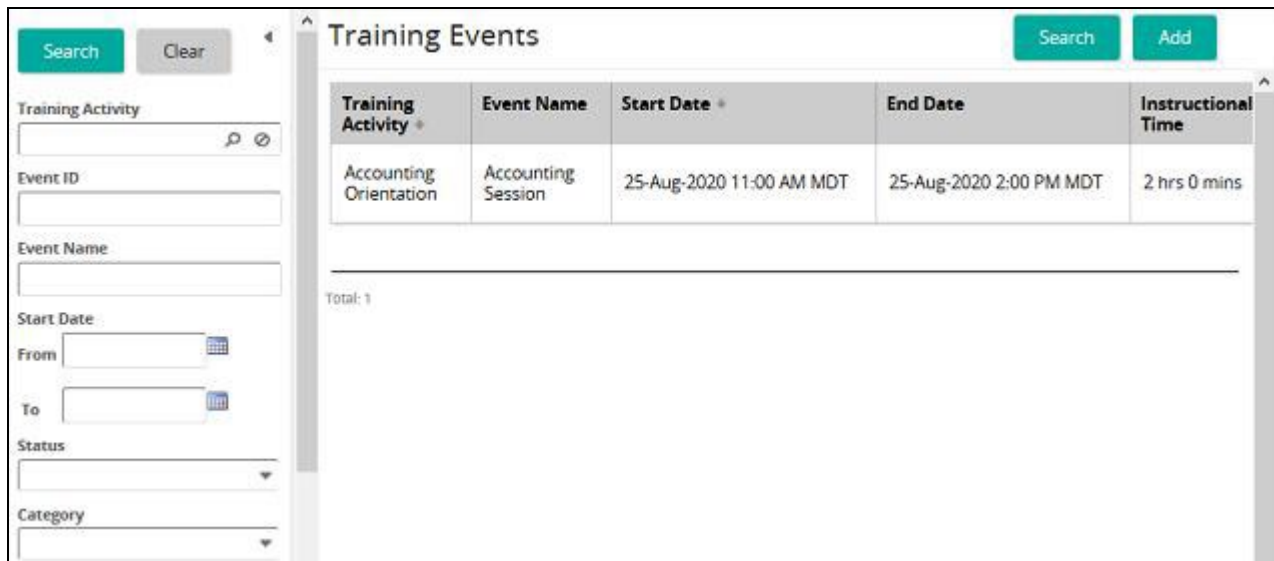
Training events and time zones

Training event time is stored and converted from UTC using the company-wide time zone as the default.

This means that when you create a training event, the time defaults to the company-wide setting. You can then change the time zone of the training event to any time zone. Time zones are easily identifiable in selection lists by name or UTC offset.

Rival Learn displays the time zone with training events anywhere in the application where a training event start date or end date is displayed. Displaying time zone with a training event ensures that you can easily identify when it occurs. You will see time zone when you view training events. Time zone is also included on training event notifications.

Training Events page



The screenshot shows the 'Training Events' page. On the left is a sidebar with search and filter options. The main area displays a table of training events.

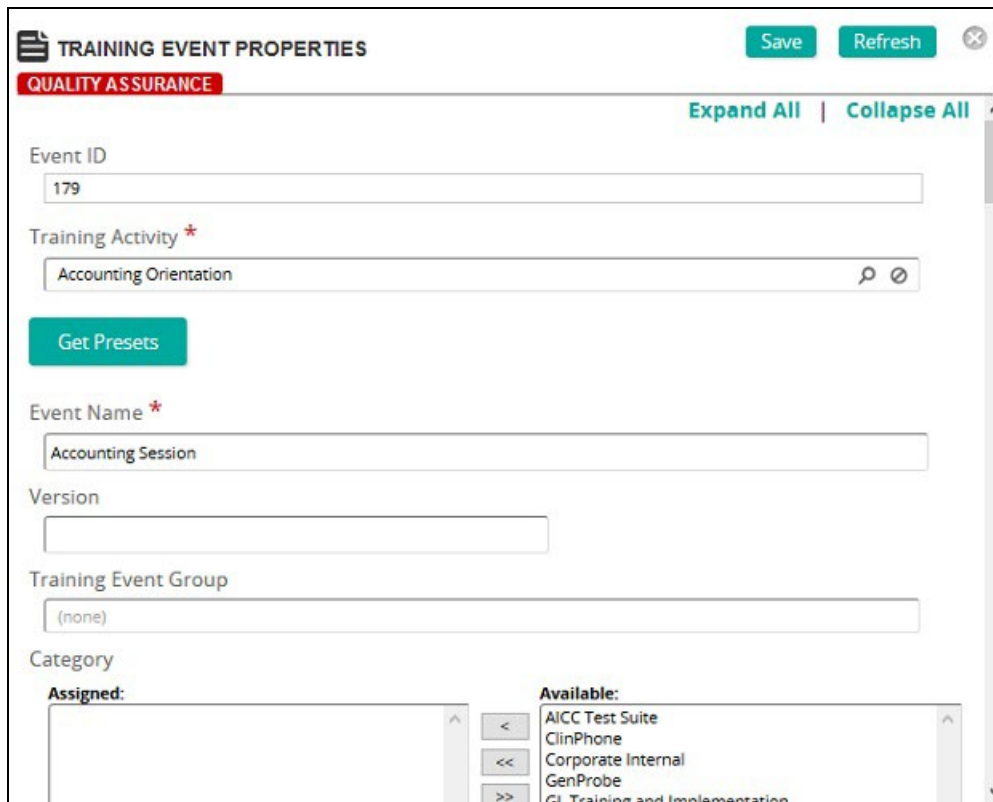
Training Activity	Event Name	Start Date	End Date	Instructional Time
Accounting Orientation	Accounting Session	25-Aug-2020 11:00 AM MDT	25-Aug-2020 2:00 PM MDT	2 hrs 0 mins

Below the table, it says 'Total: 1'.

The Training Events page shows the training events available in Rival Learn. On this page, you can:

- Use the search function to find a specific training event or events
- Add a training event
- Access the Training Event Properties page to make changes to existing training events
- Delete a training event
- Copy a training event

Training Event Properties page



The screenshot shows the 'TRAINING EVENT PROPERTIES' form. At the top right are 'Save' and 'Refresh' buttons. Below the title is a red 'QUALITY ASSURANCE' banner. To the right of the banner are 'Expand All' and 'Collapse All' links. The form contains several input fields: 'Event ID' with the value '179', 'Training Activity' with 'Accounting Orientation' and a search icon, 'Event Name' with 'Accounting Session', 'Version' (empty), and 'Training Event Group' with '(none)'. At the bottom, there is a 'Category' section with an 'Assigned' list (empty) and an 'Available' list containing 'AICC Test Suite', 'ClinPhone', 'Corporate Internal', 'GenProbe', and 'GL Training and Implementation'. A 'Get Presets' button is located below the 'Training Activity' field.

On the Training Event Properties page, you can create a training event or modify an existing one.

Fields

Training Activity: Click  to search for and select a training activity.

Note: Linking to a training activity automatically loads the presets for the activity into the event. To restore any preset values from the linked activity, click **Get Presets**.

Event Name: Type the training event name.

Version: The version is inherited from the training activity. This version is attached to all student records created for the event.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Associated Survey: If applicable, associate a survey to the training event. Associating a survey is used for reporting purposes only. Survey data must be entered manually using the survey assess function.

Schedule

Status: Select one of the following statuses:

- **Planning** - The initial state of a Training Event once it has been created. Training Events in planning can be loaded to the Planning Board, but does not appear on the Calendar. Training Event notifications are not triggered by Training Events in Planning status.

- **Scheduled** – Scheduled Training Events can be loaded to the Planning Board, appear in the Training Calendar/Course Catalog, and trigger Training Event notifications when an active notification exists. Students can self-enroll at this level. Scheduled Training Events may still be Canceled for insufficient enrollments or other reasons.
- **Confirmed** – Training Events that are changed to Confirmed are Training Events that will be offered and usually not cancelled. Confirmed Training Events can be loaded to the Planning Board, appear in the Training Calendar/Course Catalog, and trigger Training Event notifications when an active notification exists.
- **Cancelled** – Training Events that are changed to Cancelled are removed from the Training Calendar/Course Catalog. Cancelled Training Events trigger Training Event Cancel notifications when an active notification exists. (**Note:** Users currently enrolled in a cancelled event can enroll in another class in the same course.)
- **Closed** – Training Events that are changed to Closed prevent students from self-enrollment. The Closed status can be used to shut off additional enrollments.
- **Completed** – Training Events that are changed to Completed. The Completed status can be used to identify training events where a student record has been recorded.

Time Zone: The default company-wide time zone setting appears here. To set the time zone for this training event to another time zone, select it from the drop-down list.

Note: Rival Learn displays the time zone anywhere where a training event's start date or end date is displayed. This includes the Training page, Training Catalog, Training Calendar, Course Catalog, notifications, and reports.

Start Date: Click **Select Date** and select a date, then using the slide select the hour and minute. If the site is configured to set time zones, select a time zone from the drop-down box. Any Training Event Notifications using Outlook invites that are triggered for the event will notify the recipient in their local time zone. Click **Done**.

Span Type: Select either **End Date**, **Instructional Time**, or **Multiple Sessions**.

End Date: If you selected End Date for Span Type, use the calendar and time pop-ups to select date and time.

Instructional Time: If you selected Instructional Time for Span Type, type the hours and minutes.

Multiple Sessions: If you selected Multiple Sessions for Span Type, click **Add** in the Sessions panel. Define the sessions (start date, instructional time, and so on.)

Scheduling Rules: Create a scheduling rule to override an existing global scheduling rule or if there are special circumstances that require the event to be scheduled differently. Click **Add** to create and add a scheduling rule to this training event.

Tip: Local scheduling rules do not apply to multiple session training events. In a future release, the Scheduling Rules panel will not be shown when Span Type is Multiple Sessions.

Instructors: To add instructors to this training event, click **Add** to search for and select instructors.

Location & Contact Information

Event Type: In the drop-down list, select one of the following:

- Classroom Training
- Online Virtual Event
- Cisco WebEx

- Citrix GoToMeeting/GoToWebinar
- Microsoft Office Live Meeting
- Adobe Connect

Vendor: Click  to search for and select a vendor from the Vendors page.

Administrator Name: Type the name of the course administrator.

Administrator Email: Type the email of the course administrator.

Training Events Contact: Click **Add** to search for and select a contact or contacts for this training event. If the training event is part of a training event group, then the Training Event Contacts list is the list of all contacts for all events in the group. This contact list is the recipient list for TE Notifications if the notification is active. Contacts **MUST** be defined as a Rival Learn Administrator user to be available as a training event contact.

If you selected Classroom Training, these fields are available:

Venue: Click  to search for and select a venue.

Training Location: Click  to search for and select a location where the training is to occur. This is typically a room name or room number.

If you selected any of the online event types, these fields are available:

Meeting URL: Type the URL of the meeting.

Meeting Number: Type the number of the meeting.

Call-in Number(s): Type the number(s) to call into the meeting.

Conference Code: Type the conference code number.

Enrollments

Minimum Enrollments: Type the minimum number of students to run or cancel a course.

Maximum Enrollments: Type the maximum number of students allowed to enroll in a course. Students enrolling after the maximum enrollment setting has been reached are automatically added to the waiting list for the event.

Note: Leaving this field empty means no maximum is set for the event. All students will be added to the enrollment list for the event. Entering 0 (ZERO) in this field means that all students will be added to the waiting list for the event.

Enrollment Cut-off: Type the number of days before a course to stop automatic enrollments. Students enrolling on or after this date are automatically added to the waiting list for the event.

Allow Training Event Enrollment without Prerequisite Mastery: This is a preset for all training events created from the training activity. If selected, students are allowed to enroll in any training events even when they have NOT MET all the prerequisites.

Student May Cancel Training Event Enrollment: Select this check box to allow the student to cancel enrollment in the course.

Cancellation Cut-off: Type the number of days students can no longer cancel enrollment to help administrators determine whether a cancellation penalty will be imposed.

Cancellation Penalty: Type the percentage of the cancellation penalty if any.

Absentee Penalty: Type the percentage of the absentee penalty if any.

Enrollment Approval Required: Select this check box if approval is required before enrollment.

Enrollment List: This list refers to students that are added to the Enrollments List if self-registration is available (up to the maximum number for the training event). Click **Add** to add a student to the enrollment list.

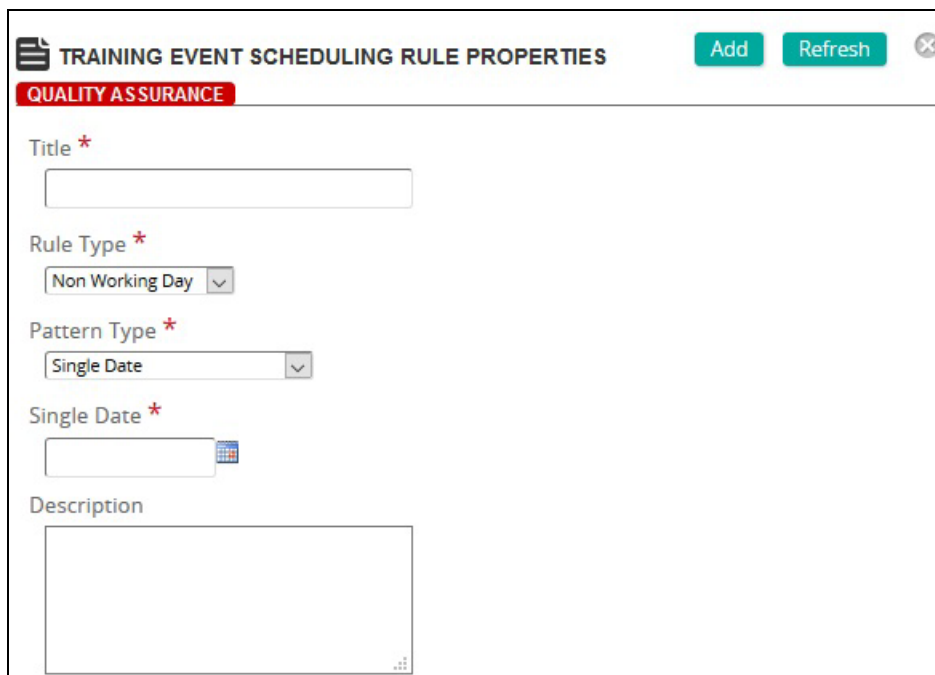
Automatic Enrollment from Waitlist: Select this check box to have approved students from the Waiting List move to the Enrollment List. When an enrollment space becomes available, Rival Learn automatically assigns the space to the earliest student in the waitlist up to the maximum enrollment allowed in the enrollment list.

Wait List: This list refers to students that are added to the Waiting List if self-registration is available and the maximum number for the training event has been exceeded or when a Training Event requires approval to enroll. Click **Add** to add a student to the waitlist.

Notes: Type any pertinent information about the event. Maximum number of characters you can type here is 5000 characters.

Syllabus Notes: Syllabus Notes are an outline of the subjects and topics covered in a training event. It gives students a quick look at the structure of an event. Type syllabus notes in this field.

Training Event Scheduling Rule Properties page



On this page, you can create a scheduling rule to override an existing global scheduling rule or if there are special circumstances that require the event to be scheduled differently.

Title: Type a title that describes the rule.

Rule Type: Select one of the following rule types:

- **Non-Working Day** - This rule type allows non-working days to be defined within an organization. Various Pattern Types can be used to block out a specific day or date range that training CANNOT take place, in addition to the global rules that apply.
- **Non-Working Time** - This rule type defines the actual time (in hours) for a specific date range that training CANNOT take place, in addition to the global rules that apply.

- **Business Hours** - This rule type can be used to change the normal business hours of operation for an event. Business hours can be set for a specific day or other pattern where training CAN take place. (Change the normal business hours from 8:00 to 5:00pm to 9:00 to 4:00pm, for example).
- **Mastery Date** - This rule type can be used to override a global rule for an event. For example, the Global Calendar Rule for New Year's Day can be overridden as a work day for refinery maintenance.

Pattern Type: Select one of the following:

- **Single Date** - if the rule applies for a specific date on the calendar.
- **Day of the Week** - if the rule applies for a specific day of the week and repeats for a set number of weeks or longer.
- **Day of the Month** - if the rule applies for a specific day of the month and repeats for a set number of months or longer.
- **Work Week** - if the rule applies only to the defined work week (e.g. Monday to Friday).
- **Full Week** - if the rule applies to the full week (Sunday to Saturday).
- **Date Span** - if the rule applies to a specified Date span.

Note: The remaining fields on this page vary based on the rule type and pattern type that you selected. Complete the fields as appropriate.

Add a training event

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Events**.

The **Training Events page** (page 87) opens.

3. Click **Add**.

The **Training Event Properties page** (page 88) opens.

4. From the Training Activity box, click  to search for and select a training activity.

Note: Linking to a training activity automatically loads the presets for the activity into the event. To restore any preset values from the linked activity, click **Get Presets**.

5. In the Event Name text box, type the training event name.
6. Complete the remaining fields as appropriate.
7. Click **Add**.

Copying a training event

You can copy an existing training event and use it as a basis to create a new training event in the future. It is an efficient way to create a new training event rather than creating one from scratch. When copying an existing training event, Rival Learn:

- Clones the training event and all associated sessions
- Copies all the instructor and resource information
- Copies the start date, start time, and time zone
- Names the training event by appending *Copy* and date/time stamp to the end of the name

- Does not copy training event group name, enrollment list, declined audit log, and approval comment
- Does not *automatically* transfer students on the Waitlist to the cloned training event. However, you can choose to transfer them to the cloned training event.

Note: If the training event to be copied is a Requires Enrollment Approval type and you choose to transfer the waitlist, the new training event is created with the waitlisted users and approval status is changed to pending, approval comment is purged, approval requested date is changed to be the copy date time, and waitlist reason appears as *Added by Administrator*.

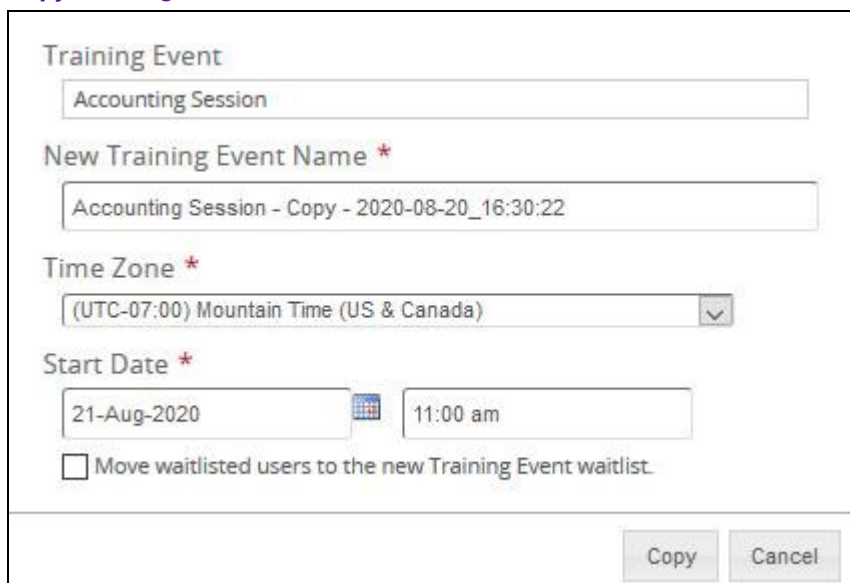
You work with a copied training event on the **Copy Training Event window** (on page 93).

By default, after a copy of a training event is created, it appears on the Training Events page with a Planning status.

Training event enrollment notifications

When copying an existing training event, Rival Learn automatically triggers training event notifications as long as they are configured and active. For details, refer to **Notification messages, triggers and properties** (on page 321).

Copy Training Event window



The screenshot shows the 'Copy Training Event' window. It contains the following fields and controls:

- Training Event:** A text box containing 'Accounting Session'.
- New Training Event Name ***: A text box containing 'Accounting Session - Copy - 2020-08-20_16:30:22'.
- Time Zone ***: A dropdown menu showing '(UTC-07:00) Mountain Time (US & Canada)'.
- Start Date ***: Two adjacent text boxes. The first contains '21-Aug-2020' and the second contains '11:00 am'.
- ☐ Move waitlisted users to the new Training Event waitlist.
- At the bottom right, there are two buttons: 'Copy' and 'Cancel'.

The Copy Training Event window appears when you are copying a training event. From this window, you can rename the copied training event and change the time zone, start date, and start time. You can also choose to move waitlisted user to the new training event waitlist.

Fields

New Training Event Name: This name defaults to the original training event name with *Copy* and a date/time stamp appended to the end. Change the training event name if you want.

Time Zone: Defaults to the time zone of the original training event. Change the time zone if appropriate.

Start Date: Start date defaults to one day in the future of the original training event. The time defaults to that of the original training event. Change the start date and time as appropriate for this copied training event.

MOVE waitlisted users to new Training Event waitlist: To move users from the Waitlist on the original training event to the Waitlist on the copied event, select this check box. Otherwise, by leaving this check box unselected, users are not moved from original training event Waitlist to the new one.

Copy a training event

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Events**.

The **Training Events page** (page 87) opens.

3. Search for the training event that you want to copy.
4. In the list beside a training event, click  and then click **Copy**.

The **Copy Training Event window** (page 93) opens. The system automatically creates a new event name by appending Copy and the date and time stamp to the end of the training event name.

5. (If applicable) Change the training event name.
6. (If applicable) Change the time zone of the training event.
7. Change the start date and time.
8. (If applicable) If you want students on the original training event Waitlist to transfer to the copied training event Waitlist, select **MOVE waitlisted users to new Training Event waitlist**.
9. Click **Copy**.

The system creates the new event, cleans out the enrollment list, copies the resources, and checks scheduling rules. If there is a scheduling rules conflict, it prompts you if there is a problem or moves the event based on those rules.

Schedule a training event

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Events**.
3. Search for and select the training event that you want.

The **Training Event Properties page** (page 88) opens.

4. In the Schedule section, select a status.
5. In the Time Zone box, the default company-wide time zone setting appears here. To set the time zone for this training event to another time zone, select it from the drop-down list.

Note: Rival Learn displays the time zone anywhere where a training event's start date or end date is displayed.

6. From the Start Date box, click **Select Date** and select a date, then using the slide select the hour and minute. If the site is configured to set time zones, select a time zone from the drop-down box. Any Training Event Notifications using Outlook invites that are triggered for the event will notify the recipient in their local time zone. Click **Done**.
7. From the Span Type drop-down box, select one of the following:
 - Select **End Date**, then click **Select Date** and select a date, then using the slide select the hour and minute.

- Select **Instructional Time**, then type the hours and minutes.
 - Select **Multiple Sessions**, then click **Add** in the Sessions panel to define the sessions (name, date, instructional time, and so on.).
8. From the End Date box, select a day, month, and year or click **Select Date** and select a date, then using the slide select the hour and minute. If the site is configured to set time zones, select a time zone from the drop-down box. Any Training Event Notifications using Outlook invites that are triggered for the event will notify the recipient in their local time zone. Click **Done**.
 9. From Scheduling Rules, click **Add**.

The **Training Event Scheduling Rule Properties page** (page 91) opens.

Create a scheduling rule to override an existing global scheduling rule or if there are special circumstances that require the event to be scheduled differently.

10. In the Title text box, type the title of the event rule.
11. From the Rule Type drop-down box, select a rule type.
12. Enter all required fields for each rule type.
13. From the Pattern Type drop-down box, select a pattern type.
14. Click **Add**.

Tip: To remove items from the Scheduling Rules, select individual check box(s) or click **Select All** or **Mark All**, then click **Remove Selected**.

For details on adding an instructor to a training event, refer to **Scheduling an instructor for a training event** (on page 96).

Create a multi-session training event

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Events**.
3. Click **Add**.

The **Training Event Properties page** (page 88) opens.

4. Select a training activity.
5. Name the event.
6. In the Schedule section, select a status.
7. In the Time Zone box, the default company-wide time zone setting appears here. To set the time zone for this training event to another time zone, select it from the drop-down list.

Note: Rival Learn displays the time zone anywhere where a training event's start date or end date is displayed.

8. From the Span Type drop-down box, select **Multiple Sessions**.
9. In the Sessions panel, click **Add** and then define the session (name, date, instructional time, and so on.). Click **Add**.
10. Repeat step 8 for each session.
11. (If applicable) Add instructors, specify location and contact info, and set enrollment limits.

12. Click **Add**.
13. On the Training Event Properties page, click **Save**.

Scheduling an instructor for a training event

You can schedule an instructor for a training event in two ways:

- On the Planning Board
- On the Training Event Property page

Schedule an instructor for a training event on the Planning Board

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Planning Board**.

The Planning Board Calendar opens.

3. Search for and select a training event.
4. Click **Confirm**.

The training event is added to the calendar.

5. In the list of training events, click the event.

The Planning Board opens with a default session for the event you selected.

6. Click the **Instructor** tab.

A list of qualified instructors for the training event opens.

Tip: If no instructor is auto-qualified for the training event or an alternate instructor is desired, add an instructor and then search for that instructor.

7. Place a check mark in the check box for the selected instructor, and click **Save**.

The instructor is assigned to the session.

Schedule an instructor for a training event on the Training Event Property page

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Events**.

The **Training Events page** (page 87) opens.

3. In the list beside a training event, click  and then click **Properties**.

The **Training Event Properties page** (page 88) opens.

4. In the Schedule section in the Instructors field, click **Add**.
5. Search for the instructor that you want.
6. In the Instructors panel, select an instructor.
7. Click **Confirm**.

Note: Instructor qualifications are not applied when assigning an instructor to a training event. Instructor qualifications are only calculated from within the Planning Board.

Managing Enrollments

You can manage training event enrollment using the enrollment list and waiting lists for each training event. Events that require enrollment approval can be set by selecting the Enrollment Approval Required check box that appears above the enrollment list. Selecting this check box automatically adds ALL students seeking enrollment to the waiting list for the event. Enrollments and waitlists can be managed automatically based on the enrollment settings for the event for self-enrollments, or by using the management control buttons below each list.

1. From the Minimum Enrollments text box, type the minimum number of students allowed in the enrollment list. Minimum Enrollments refers to the number of students to determine whether an event has sufficient students to run or whether it should be cancelled.
2. From the Maximum Enrollments text box, type the maximum number of students allowed in the enrollment list. Maximum Enrollments refers to the number of students allowed to enroll in an event. Students self-enrolling after the maximum enrollment setting has been reached are automatically added to the waiting list for the event.
3. From the Enrollment Cut-off text box, type the number of days when students are no longer allowed in the enrollment list. Enrollment Cut-off refers to the days before the event to stop automatic enrollment on this day. Students self-enrolling on or after this date are automatically added to the waiting list for the event.
4. Select the **Allow Training Event Enrollment without Prerequisite Mastery** check box to allow students to enroll without having mastered all prerequisites.
5. Select the **Student May Cancel Training Event Enrollment** check box to allow students to cancel enrollment.
6. From the Cancellation Cut-off text box, type the number of days when students are no longer allowed to cancel. Cancellation Cut-off refers to the days before the event when students can no longer cancel to help administrators determine whether a cancellation penalty will be imposed.
7. From the Cancellation Penalty text box, type the percentage of the penalty for cancellation. Cancellation Penalty refers to the percentage of the cancellation penalty if any.
8. From the Absentee Penalty text box, type the percentage of the penalty for being absent. Absentee Penalty refers to the percentage of the absentee penalty if any.
9. Select the Enrollment Approval Required check box, to force all enrollments to the waitlist until approved by an administrator. Enrollment Approval Required refers to the required approval for student enrollments.
10. From Enrollment List, click **Add**. The Students page opens. Enrollment List refers to students that are added to the Enrollments List if self-registration is available (up to the maximum number for the training event).
11. Click **Search** or filter the search by typing additional information into the filter boxes.
12. Select the check box(s) next to the student(s) or click **Select All**, then click **Confirm**.
13. To remove students from the Enrollment List, select individual check box(s) or click **Select All** or **Mark All**, then click **Cancel Selected**.
14. Select the **Automatic Enrollment From Waitlist** check box to have approved students from the Waiting List move to the Enrollment List. When an enrollment space becomes available, Rival Learn automatically assigns the space to the earliest student in the waitlist up to the maximum enrollment allowed in the enrollment list.

15. From Waiting List, click **Add**. The Students page opens. Waiting List refers to students that are added to the Waiting List if self-registration is available and the maximum number for the training event has been exceeded or when a Training Event requires approval to enroll.
16. From the Students page, click **Search** or filter the search by typing additional information into the filter boxes.
17. Select the check box(s) next to the student(s) or click **Select All**, then click **Confirm**.
18. To move students from the Waiting List to the Enrollment List, select individual check box(s) or click **Select All** or **Mark All**, then click **Approve**.
19. To remove students from the Waiting List, select individual check box(s) or click **Select All** or **Mark All**, then click **Cancel Selected**.
20. Click **Add**.

Waitlist

The automatic waitlist feature allows approved students from the waiting list to automatically move to the enrollment list if a seat opens up due to a cancellation. Rival Learn automatically assigns the space to the earliest student in the waitlist, up to the maximum enrollment allowed in the enrollment list.

This feature is controlled by the Automatic Enrollment From Waitlist check box on the **Training Event Properties page** (page 88).

Managing Self Enrollment – Waitlist Prompt

Students enrolling in training events where their enrollment would result in being placed on a waitlist are prompted after selecting an enrollment request. Users have the option to cancel their enrollment request based on the prompt.

Managing Self Enrollment – Enrollment Cancellation

Students can cancel any self-enrolled eCourse or training event from their homepage portal (see exceptions below).

Students may cancel any:

- eCourse that they have started progress on
- eCourse they have not yet started
- Training event they have scheduled or been scheduled in
- Training event they are currently on the Waitlist for

A new "Training Catalog Cancel Enrollment Prompt" which contains all of the messages and actions required for a student to cancel an enrollment is available. Students may enter an optional comment on a cancellation request that can be recorded and reported on later by an administrator. Students are warned that canceling an enrollment cannot be undone by them. Students can re-enroll in any event they cancel and still have access.

Students cannot cancel any:

- eCourse added through the Ecommerce Catalog
- Training event after the Cancellation Cut-off time has passed
- Training event that has already passed the Event Start Time
- eCourse that is being currently pushed as required training via a Qualification
- eCourse that they have completed (since the page has last been loaded)

- Training event they are no longer enrolled in (since the page has last been loaded)

Cancelled eCourses appear clearly marked on the student's My History page but they may not launch them in review mode.

Administrators may optionally individually turn off the ability to cancel:

- A specific eCourse
- A specific training event
- All training events created from a specific training activity
- All training events created from a specific training event group

All student initiated training event cancellations completed through MS Outlook declines (if implemented) or using the new Enrollment Cancellation features will be available to view by administrators in the "TE Declined" Audit Log in the properties of the training event.

Managing Enrollments – Enrollment Cancellation Reports

Administrators with access to the Assess tab will have the ability to reverse a student enrollment cancellation. It will not be possible for a student to un-cancel at this time.

The "eCourse Enrollment Cancellation Details" system report lists the following for all eCourse cancellations:

- eCourse Name
- Cancel Date
- Cancelled by
- User Comment

The SR Declined Training Event Invitations system report includes Training Events cancelled by users in addition to those declined via MS Outlook. It lists the following about Training Event Cancellations:

- Training Activity Name
- Training Event Name
- Training Event Venue
- Training Event Start Date
- Cancel Date
- Cancelled by
- User Comment

Managing Enrollments – Enrollment Cancellation Notifications

The following notifications have been modified to also be triggered when a student cancels their enrollment in a Training Event

- TE Enrollment Cancellation
- TE Waitlist Cancellation

Manage enrollment for a training event

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Events**.

3. Search for and select the training event that you want.

The **Training Event Properties page** (page 88) opens.

4. In the Enrollments section, complete the fields as appropriate.

5. Click **Add**.

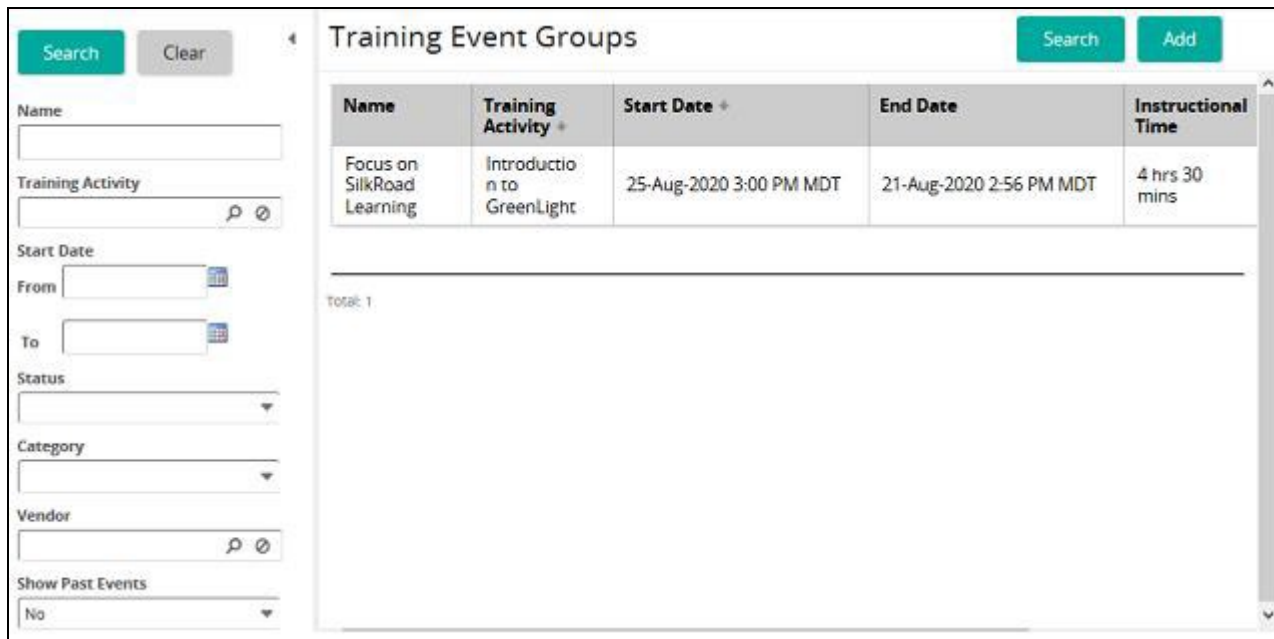
Training event groups

A training event group is used to define a multi-location event (connected via teleconference or web) where students meet in multiple locations for a single event.

Training event groups appear on the Planning Board's Training Calendar. There, students can be enrolled and view the training synopsis for the event.

Only training events with status *Scheduled*, *Confirmed*, *Closed* appear on the student Training Calendar. Training events with status *Planning*, *Scheduled*, *Confirmed*, *Closed* and *Completed* appear in the Planning Board Training Calendar.

Training Event Groups page



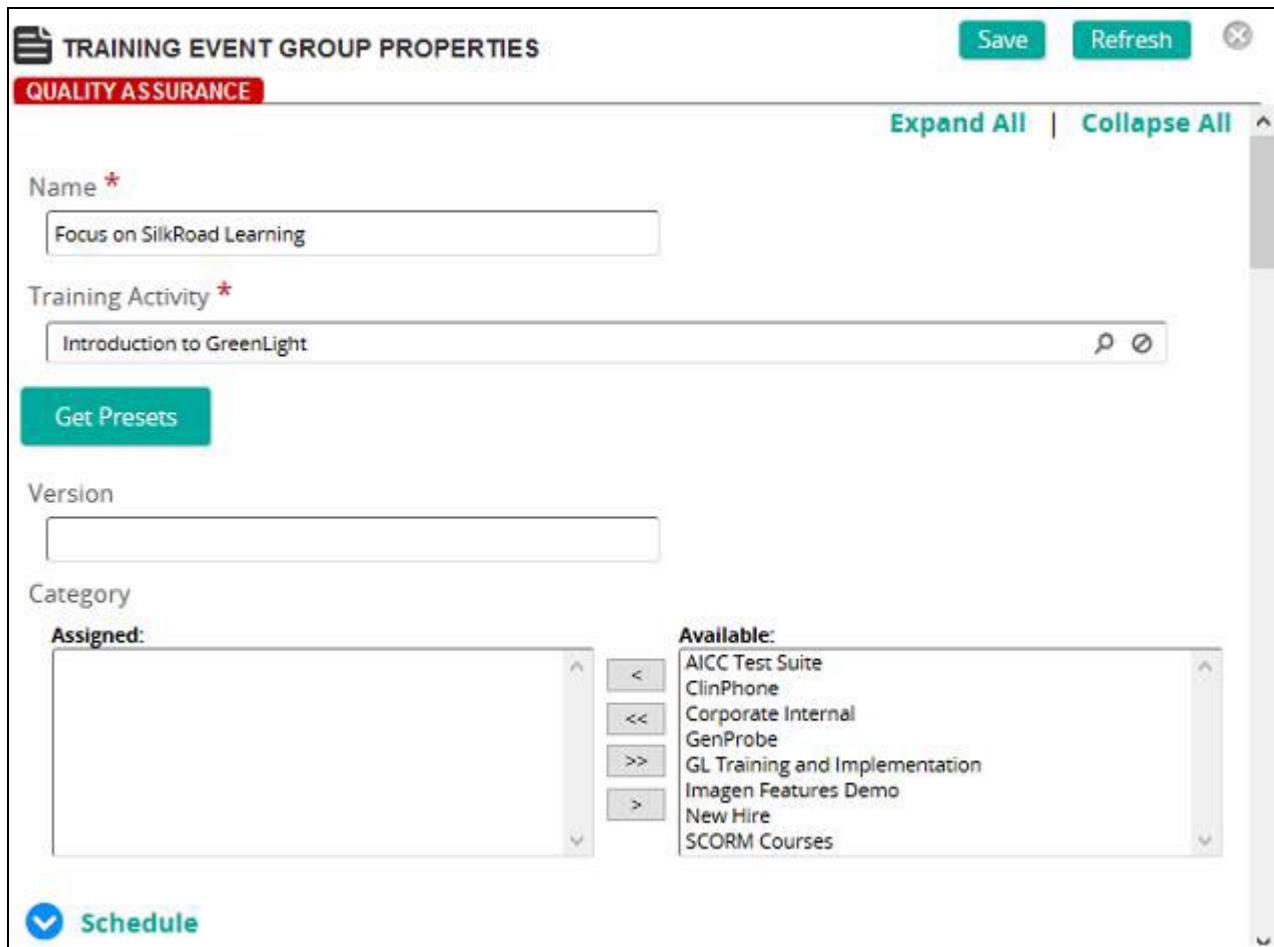
Name	Training Activity	Start Date	End Date	Instructional Time
Focus on SilkRoad Learning	Introduction to GreenLight	25-Aug-2020 3:00 PM MDT	21-Aug-2020 2:56 PM MDT	4 hrs 30 mins

Total: 1

The Training Event Groups page shows the training event groups available in Rival Learn. On this page, you can:

- Use the search function to find a specific training event group or groups
- Add a training event group
- Access the Training Event Groups Properties page to make changes to existing training event groups
- Delete a training event group

Training Event Group Properties page



The screenshot shows the 'TRAINING EVENT GROUP PROPERTIES' page. At the top right are 'Save' and 'Refresh' buttons. Below the title is a red 'QUALITY ASSURANCE' banner. On the right side of the form are 'Expand All' and 'Collapse All' links. The form contains several fields: 'Name' with a red asterisk and a search icon, containing the text 'Focus on SilkRoad Learning'; 'Training Activity' with a red asterisk and a search icon, containing the text 'Introduction to GreenLight'; a 'Get Presets' button; 'Version'; 'Category'; and a list management section with 'Assigned:' and 'Available:' lists. The 'Available:' list includes items like 'AICC Test Suite', 'ClinPhone', 'Corporate Internal', 'GenProbe', 'GL Training and Implementation', 'Imagen Features Demo', 'New Hire', and 'SCORM Courses'. At the bottom left is a 'Schedule' button with a checkmark icon.

On the Training Event Group Properties page, you can create a training event group or modify an existing one.

Fields

Training Activity: Click  to search for and select a training activity.

Note: Linking to a training activity automatically loads the presets for the activity into the event group. To restore any preset values from the linked activity, click **Get Presets**.

Version: The version is inherited from the training activity. This version is attached to all student records created for the event.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Schedule

Status: Select one of the following statuses:

- **Planning** - The initial state of a Training Event once it has been created. Training Events in planning can be loaded to the Planning Board, but does not appear on the Calendar. Training Event notifications are not triggered by Training Events in Planning status.

- **Scheduled** – Scheduled Training Events can be loaded to the Planning Board, appear in the Training Calendar/Course Catalog, and trigger Training Event notifications when an active notification exists. Students can self-enroll at this level. Scheduled Training Events may still be Canceled for insufficient enrollments or other reasons.
- **Confirmed** – Training Events that are changed to Confirmed are Training Events that will be offered and usually not cancelled. Confirmed Training Events can be loaded to the Planning Board, appear in the Training Calendar/Course Catalog, and trigger Training Event notifications when an active notification exists.
- **Cancelled** – Training Events that are changed to Cancelled are removed from the Training Calendar/Course Catalog. Cancelled Training Events trigger Training Event Cancel notifications when an active notification exists. (**Note:** Users currently enrolled in a cancelled event can enroll in another class in the same course.)
- **Closed** – Training Events that are changed to Closed prevent students from self-enrollment. The Closed status can be used to shut off additional enrollments.
- **Completed** – Training Events that are changed to Completed. The Completed status can be used to identify training events where a student record has been recorded.

Start Date: Click **Select Date** and select a date, then using the slide select the hour and minute. If the site is configured to set time zones, select a time zone from the drop-down box. Any Training Event Notifications using Outlook invites that are triggered for the event will notify the recipient in their local time zone. Click **Done**.

Span Type: Select either **End Date**, **Instructional Time**, or **Multiple Sessions**.

End Date: If you selected End Date for Span Type, use the calendar and time pop-ups to select date and time.

Instructional Time: If you selected Instructional Time for Span Type, type the hours and minutes.

Scheduling Rules: Create a scheduling rule to override an existing global scheduling rule or if there are special circumstances that require the event to be scheduled differently. Click **Add** to create and add a scheduling rule to this training event.

Vendor: Click  to search for and select a vendor from the Vendors page.

Associated Survey: If applicable, associate a survey to the training event. Associating a survey is used for reporting purposes only. Survey data must be entered manually using the survey assess function.

Administrator Name: Type the name of the course administrator.

Administrator Email: Type the email of the course administrator.

Training Events Contact: Click **Add** to search for and select a contact or contacts for this training event. If the training event is part of a training event group, then the Training Event Contacts list is the list of all contacts for all events in the group. This contact list is the recipient list for TE Notifications if the notification is active. Contacts **MUST** be defined as a Rival Learn Administrator user to be available as a training event contact.

Training Locations: Click **Add** to search for and select a training location or locations.

Enrollments

Minimum Enrollments: Type the minimum number of students to run or cancel a course.

Maximum Enrollments: Type the maximum number of students allowed to enroll in a course. Students enrolling after the maximum enrollment setting has been reached are automatically added to the waiting list for the event.

Note: Leaving this field empty means no maximum is set for the event. All students will be added to the enrollment list for the event. Entering 0 (ZERO) in this field means that all students will be added to the waiting list for the event.

Enrollment Cut-off: Type the number of days before a course to stop automatic enrollments. Students enrolling on or after this date are automatically added to the waiting list for the event.

Student May Cancel Training Event Enrollment: Select this check box to allow the student to cancel enrollment in the course.

Cancellation Cut-off: Type the number of days students can no longer cancel enrollment to help administrators determine whether a cancellation penalty will be imposed.

Cancellation Penalty: Type the percentage of the cancellation penalty if any.

Absentee Penalty: Type the percentage of the absentee penalty if any.

Enrollment Approval Required: Select this check box if approval is required before enrollment.

Notes: Type any pertinent information about the event.

Syllabus Notes: Type information for the syllabus. This appears in the Course Catalog Item.

Add a training event group

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Event Groups**.

The **Training Event Groups page** (page 100) opens.

3. Click **Add**.

The **Training Event Group Properties page** (page 101) opens.

4. From the Training Activity box, click  to search for and select a training activity.

Note: Linking to a training activity automatically loads the presets for the activity into the training event group. To restore any preset values from the linked activity, click **Get Presets**.

5. In the Name text box, type the training event group name.
6. Complete the remaining fields.
7. Click **Add**.

Schedule a training event for a training event group

Note: The key to scheduling a training event group is the locations used for the group. Rival Learn automatically creates training events linked to the training event group based on the locations added to the training event group definition.

1. From the navigation bar, click **Learning**.
 2. Under Plan, click **Training Event Groups**.
- The **Training Event Groups page** (page 100) opens.
3. Search for a training event group.
 4. In the list beside a training event group, click  and then click **Properties**.

The **Training Event Group Properties page** (page 101) opens.

5. In the Schedule section, select a status.
6. Select a start date.
7. From the Span Type drop-down box, select one of the following:
 - Select **End Date**, then select the day, month, and year or click **Select Date** and select a date, then type the hour and minute in the text boxes, then select **AM** or **PM** from the drop-down box.
 - Select **Instructional Time**, then type the hours and minutes.
8. From the End Date box, select a day, month, and year or click **Select Date** and select a date, then using the slide select the hour and minute. If the site is configured to set time zones, select a time zone from the drop-down box. Any Training Event Notifications using Outlook invites that are triggered for the event will notify the recipient in their local time zone. Click **Done**.
9. From Scheduling Rules, click **Add**.

The **Training Event Scheduling Rule Properties page** (page 91) opens.

Create a scheduling rule to override an existing global scheduling rule or if there are special circumstances that require the event to be scheduled differently.

10. In the Title text box, type the title of the event rule.
11. From the Rule Type drop-down box, select a rule type.
12. Enter all required fields for each rule type.
13. From the Pattern Type drop-down box, select a pattern type.
14. Click **Add**.

Tip: To remove items from the Scheduling Rules, select individual check box(s) or click **Select All** or **Mark All**, then click **Remove Selected**.

15. Click **Save**.

Manage enrollment for a training event group

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Training Event Groups**.
3. Search for a training event group.
4. In the list beside a training event group, click  and then click **Properties**.

The **Training Event Group Properties page** (page 101) opens.

5. In the Enrollments section, complete the fields as appropriate.
6. Click **Save**.

Planning Board



Use the Planning Board to plan and schedule training events, training event sessions, student rosters, instructors, vendors, equipment and training locations. It is great for:

- Creating multiple sessions for a training event
- Comparing session schedules or resources used for sessions to resolve resource conflicts across the organization. Resource time conflicts (when a resource is scheduled for more than one activity during the same time period) are automatically flagged to allow users the ability to resolve the resource conflict by selecting a different resource or changing the scheduled time for the event.

The Planning Board has two components: Event Session Calendar and Resource Calendar. The Event Session Calendar is where schedules for multiple events can be compared, viewed, and added.

Add an event session

1. From the navigation bar, click **Learning**.
2. Under Plan, click **Planning Board**.

The **Planning Board Calendar** (page 105) opens.

3. Click **Add**.

The **Training Events page** (page 87) opens.

4. Click **Search** or filter the search by typing additional information into the filter boxes.
5. Select the check box of the event, then click **Confirm**.
6. Click the **Properties** icon to view the **Training Event Properties page** (page 88).

Planning Calendar

The Planning Calendar displays the calendar schedule for all "Scheduled", "Confirmed" or "Planned" training events defined in the system.

Resource Calendar

The Resource Calendar is where Resources are assigned to events or event sessions, new sessions are added to the calendar, and resource schedules are viewed for a selected session in the planning board Event Session Calendar. The following functions are available:

1. Click **Add Session** to add a new session.

The Training Event Session Properties page opens.

2. From the Session Name text box, type the name of the session.

3. From Start Date, select the date and time of the session.
4. From the Span Type drop-down box, select one of the following:
 - **End Date** to schedule the session based on an entered End Date and Time.
 - **Instructional Time** to schedule the session based on the entered number of instructional hours for the session.
5. Click **Save**.
6. Click **Edit Session** to view session properties or modify an existing session.

The Training Event Session Properties page opens.

7. Click **Delete Session** to delete a currently selected session. A warning message displays.
8. From the warning message window, click **OK** to delete session or click **Cancel** to keep the session.

View or assign resources to a session

1. Select the event or event session from the Event Session Calendar.
2. Select the resource tab from the Resource Calendar.
3. Select the check box of the resources currently assigned to the Training Event appear in the resource list.
4. Click **Add** to add a resource to the resource list.
5. Click **Save** to save the selected resource(s) to a session.
6. Click **Clear** to remove all unassigned resources from the resource list.

Resource conflicts

The Planning Board automatically provides a visual indicator and lists any time conflicts that result from assigning any resource to a session. Conflicts appear immediately in both the Session Calendar and the Resource Calendar as a red bar representing the session or event with the conflict.

A rollover provides specific information about the cause of the conflict and provides a link to the events causing the conflict. The rollover provides a list of any and all conflicts for the current event and identifies the specific resource, training event, and session causing the conflict. Select the link in the conflict list to link to the affected event so the conflicting resource or the conflicting time for the event can be changed.

Training event conflicts

Training event conflicts are determined based on a comparison between the status of the Training Event currently selected on the Planning Board to the status of any other Training Event in the system. The following table provides a definition of the business rules used to determine Training Event conflicts based on this comparison.

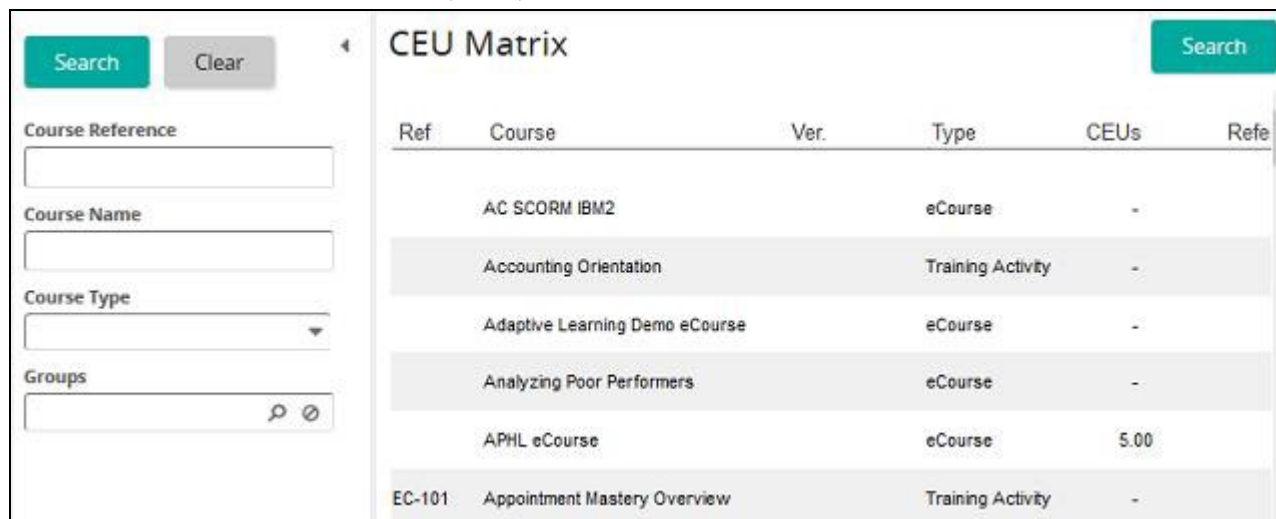
Status of Selected Planning Board Training Event	Status of any other Training Event in the System	Conflict State
Planning	Planning	CONFLICT
Planning	Confirmed	CONFLICT
Planning	Scheduled	CONFLICT
Confirmed	Planning	NO CONFLICT
Confirmed	Confirmed	CONFLICT

Confirmed	Scheduled	CONFLICT
Scheduled	Planning	NO CONFLICT
Scheduled	Confirmed	CONFLICT
Scheduled	Scheduled	CONFLICT
Cancelled	Any other state	CONFLICT
Any state	Cancelled	NO CONFLICT

Instructor qualification conflicts

The Planning Board automatically provides a visual indicator and lists any qualification conflicts that result from assigning an unqualified Instructor to a session. Conflicts appear immediately in both the Session Calendar and the Resource Calendar as a red bar representing the session or event with the conflict.

Continuing Education Units (CEU) Matrix



Ref	Course	Ver.	Type	CEUs	Refe
	AC SCORM IBM2		eCourse	-	
	Accounting Orientation		Training Activity	-	
	Adaptive Learning Demo eCourse		eCourse	-	
	Analyzing Poor Performers		eCourse	-	
	APHL eCourse		eCourse	5.00	
EC-101	Appointment Mastery Overview		Training Activity	-	

The CEU Matrix is used to assign different CEU credits for different groups.

Assign CEU credits to different groups

1. From the navigation bar, click **Learning**.
2. Under Plan, click **CEU Matrix**.

The **CEU Matrix page** (page 107) opens.

3. Click **Search** or filter the search by typing additional information into the filter boxes.
4. Select a CEU property to modify the CEU value for a particular group, training activity, or eCourse.
5. Click **Save**.

Assess

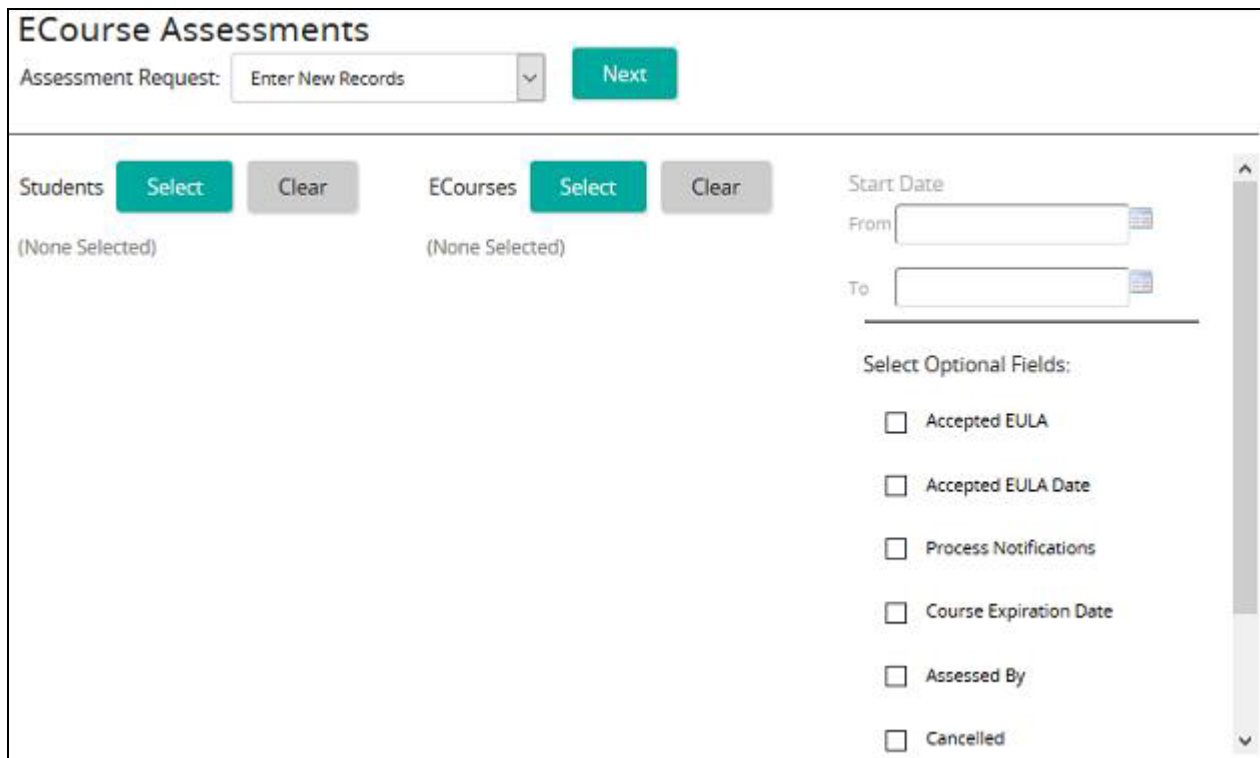
After students have completed training, records need to be updated to reflect the new status in their training histories. From the Assess tab, administrators or other users with appropriate permissions can create and modify student records for eCourses, training activities, specific training events, exams, competencies, requirements, assignments, course CEUs and surveys.

Assess eCourses

Typically a student registers for an eCourse, completes the course, and Rival Learn marks the course complete when the student finishes the course with a passing score. There may be times, however, when the system hiccups or the student times out and a score or completion is not recorded.

Assessing an eCourse gives an administrator the ability to mark an eCourse complete. Administrators assess eCourses on the **eCourse Assessment page** (page 108).

eCourse Assessments page



The screenshot shows the 'ECourse Assessments' page. At the top, there is a header 'ECourse Assessments'. Below it, an 'Assessment Request:' dropdown menu is set to 'Enter New Records', with a 'Next' button to its right. The main area is divided into two columns. The left column is for 'Students', with a 'Select' button and a 'Clear' button; below it, it says '(None Selected)'. The right column is for 'ECourses', with a 'Select' button and a 'Clear' button; below it, it says '(None Selected)'. To the right of these columns, there is a 'Start Date' section with 'From' and 'To' date pickers. Below that, a section titled 'Select Optional Fields:' contains a list of checkboxes: 'Accepted EULA', 'Accepted EULA Date', 'Process Notifications', 'Course Expiration Date', 'Assessed By', and 'Cancelled'. A vertical scrollbar is visible on the right side of the page.

On the eCourse Assessments page, an administrator can:

- Enter a new eCourse record
- Edit an existing eCourse record
- Delete an eCourse record

The most typical task an administrator performs from this page is marking an eCourse complete.

Fields

Assessment Request: Select one of the following:

- Enter New Records
- Edit Existing Records
- Delete Existing Records

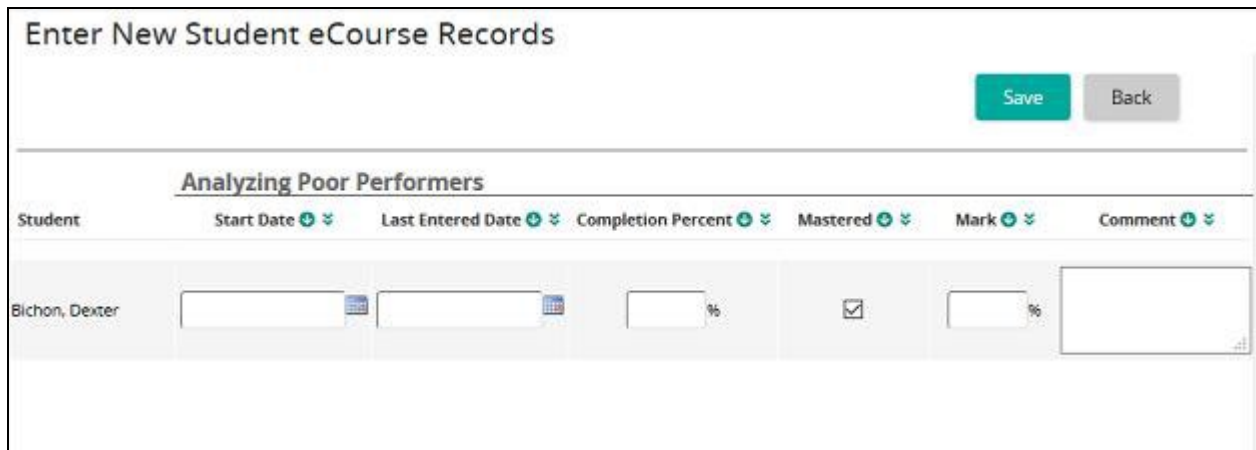
Students: Click **Select** to access the Students page where you can search for and select students. Click **Clear** to remove the selected students from the list.

ECourses: Click **Select** to access the ECourses page where you can search for and select eCourses. Click **Clear** to remove the selected eCourses from the list.

Start Date: To specify a from and to date range, click the calendar pop-up to select dates. (Only available when editing or deleting existing records.)

Select Optional Fields: Select any check boxes that may apply.

Enter New eCourse



Student	Start Date	Last Entered Date	Completion Percent	Mastered	Mark	Comment
Bichon, Dexter			%	☒	%	

Rival Learn automatically creates student records for eCourse completions so there is usually no need to create a course record. If there is a need, an administrator can create an eCourse record on this page.

Assess an eCourse

1. From the navigation bar, click **Learning**.
2. Under Assess, click **eCourses**.
The ECourse Assessments page opens.
3. From the Assessment Request drop-down box, select **Enter New Records**.
4. From the Students column, click **Select**.
5. From the Students window, click **Search** or filter the search by typing additional information into the filter boxes.
6. Select the check box of the student(s) to be added to the **Students** list, then click **Confirm**.
7. From the ECourses column, click **Select**.
8. From the ECourses window, click **Search** or filter the search by typing additional information into the filter boxes.
9. Select the check box of the eCourse(s) to be added to the ECourses list, then click **Confirm**.
10. From the **Select Optional Fields** column, select the check box of the required fields, then click **Next**.

The Enter New Student ECourse Records page opens.

11. For each student, enter the appropriate eCourse data. When entering a new record, Start Date is a mandatory field.

The options for entry in the Mark field are governed by the grading type applied in the eCourse Properties sheet.

Records are considered "Mastered" only when the Mastered check box is selected. By default, Mastered is set to be on. Records without a Mastered check box enabled are considered incomplete and do not register as having a mastery date.

12. Click **Fill Down** to copy the top value in the list for all students.
13. Click **Fill Down across ECourses** to copy the top value in the list for all students and all eCourses.
14. Click **Save** to save and update the eCourse Student Records information.

Current eCourse version data is attached to the student record and can be displayed via the Student History report.

Cancel an eCourse record manually

1. From the navigation bar, click **Learning**.
2. Under Assess, click **eCourses**.

The **ECourse Assessments page** (page 108) opens.

3. From the Assessment Request drop-down box, select **Enter New Records, Edit Existing Records, or Delete Existing Records**.
4. From the Students column, click **Select**. The **Students** window displays.
5. From the Students window, click **Search** or filter the search by typing additional information into the filter boxes.
6. Select the check box of the student(s) to be added to the **Students** list, then click **Confirm**.
7. From the ECourses window, click **Search** or filter the search by typing additional information into the filter boxes.
8. Select the check box of the ecourse(s) to be added to the **ECourses** list, then click **Confirm**.
9. From the Select Optional Fields column, select the check box of **Cancelled** and **Cancellation Comment**, then click **Next**.

The **Enter New Student ECourse Records page** (page 109) opens.

10. From the Cancelled column, select the check box to activate for each student.
11. From the Cancellation Comment text box, enter an optional comment.

The comment will be attached to the eCourse record for reporting purposes.

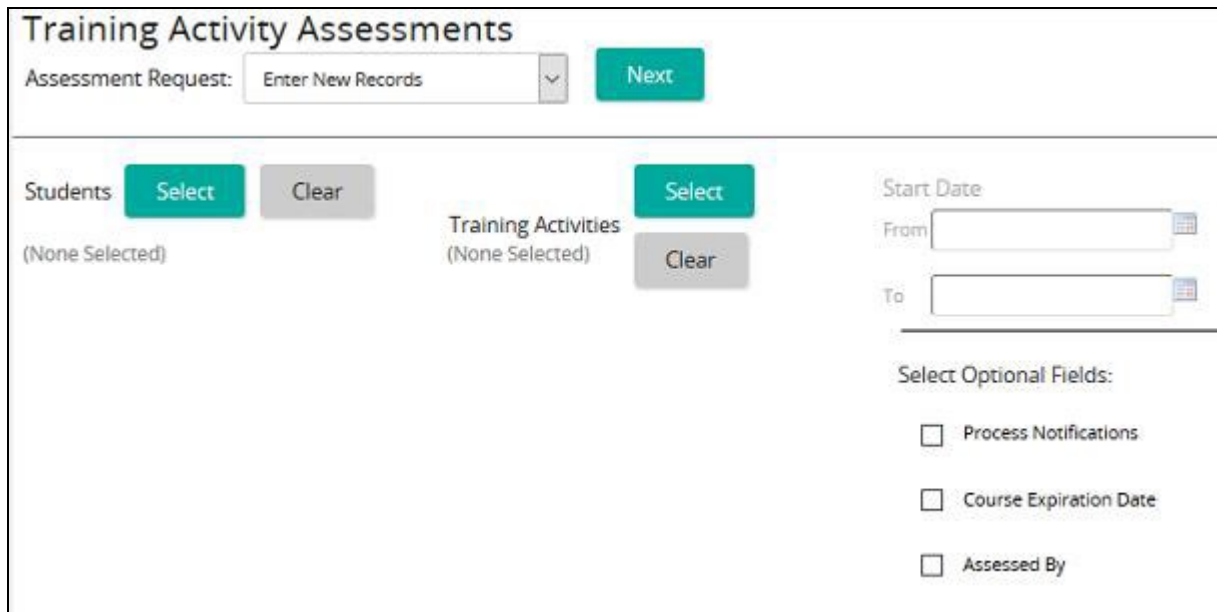
12. Click **Save**

The eCourse Student Records information is updated.

Assess Training Activities

Administrators can quickly build an assessment table based on training activities, students and custom fields as well as assess grading cards for training activities. Administrators do these tasks from the **Training Activity Assessments page** (page 111).

Training Activity Assessments page



The screenshot shows the 'Training Activity Assessments' page. At the top, there is a title 'Training Activity Assessments' and a section for 'Assessment Request' with a dropdown menu set to 'Enter New Records' and a 'Next' button. Below this, there are two main sections: 'Students' and 'Training Activities'. The 'Students' section has a 'Select' button and a 'Clear' button, with '(None Selected)' below. The 'Training Activities' section has a 'Select' button and a 'Clear' button, with '(None Selected)' below. To the right of these sections is a 'Start Date' section with 'From' and 'To' date pickers. Below the date pickers is a 'Select Optional Fields' section with three checkboxes: 'Process Notifications', 'Course Expiration Date', and 'Assessed By'.

On the Training Activity Assessment page, an administrator can assess training activities for a student or students. An administrator can:

- Add new records
- Modify existing records
- Delete records

Fields

Assessment Request: Select one of the following:

- Enter New Records
- Edit Existing Records
- Delete Existing Records

Students: Click **Select** to access the Students page where you can search for and select students. Click **Clear** to remove the selected students from the list.

Training Activities: Click **Select** to access the Training Activities page where you can search for and select training activities. Click **Clear** to remove the selected training activities from the list.

Start Date: To specify a from and to date range, click the calendar pop-up to select dates. (Only available when editing or deleting existing records.)

Select Optional Fields: Select any check boxes that may apply.

Assess training activities for students

1. From the navigation bar, click **Learning**.
2. Under Assess, click **Training Activities**.

The **Training Activity Assessments page** (page 80) opens.

3. From the Assessment Request drop-down box, select **Enter New Records**, **Edit Existing Records**, or **Delete Existing Records**.
4. From the Students column, click **Select**.
5. Search for and select a student or students, and then click **Confirm**.

Records are considered "Mastered" only when the Mastered check box is selected. By default, Mastered is set to be on. Records without a Mastered check box enabled are considered incomplete and do not register as having a mastery date.

6. From the Training Activities column, click **Select**.

The **Training Activities page** (page 79) opens.

7. Search for and select a training activity or activities and then click **Confirm**.
8. From the Select Optional Fields column, select the check box of the required fields, then click **Next**.

The Enter New Student Training Activity Records page opens.

9. For each student, enter the appropriate training session data. When entering a new record, Start Date is a mandatory field.

Training Activity Records that have been saved can be viewed as a report by selecting the Monitor tab in Rival Learn.

Custom Data Fields can be added to the Select Field table as required. This provides added flexibility for customizing student training activity records.

10. Click **Fill Down** to copy the top value in the list for all students.
11. Click **Fill Down** across ECourses to copy the top value in the list for all students and all training activities.
12. (If applicable) **Add an attachment** (see "**Add an attachment to a student's training activity**" on page 112).
13. Click **Save** to save and update the Training Activity Student Records information.

Add an attachment to a student's training activity

Note: This topic assumes you have performed steps in **Assess training activities for students** (on page 111) and are on the Enter/Edit New Student Training Activity Records page.

- You can upload a document to attach to the training activity. Maximum file size for the document cannot exceed 5 MB.
 - Supported uploaded document file types are pdf, doc, docx, xls, xlsx, ppt, pptx, pps, ppsx, odt, key, jpg, png, gif, and jpeg.
1. For the student and training activity you want, in the Attachment box, click . Browse and find the document and then double-click to select it.
 2. Click **Save**.

As an administrator, you can now view , remove , or download  the attachment.

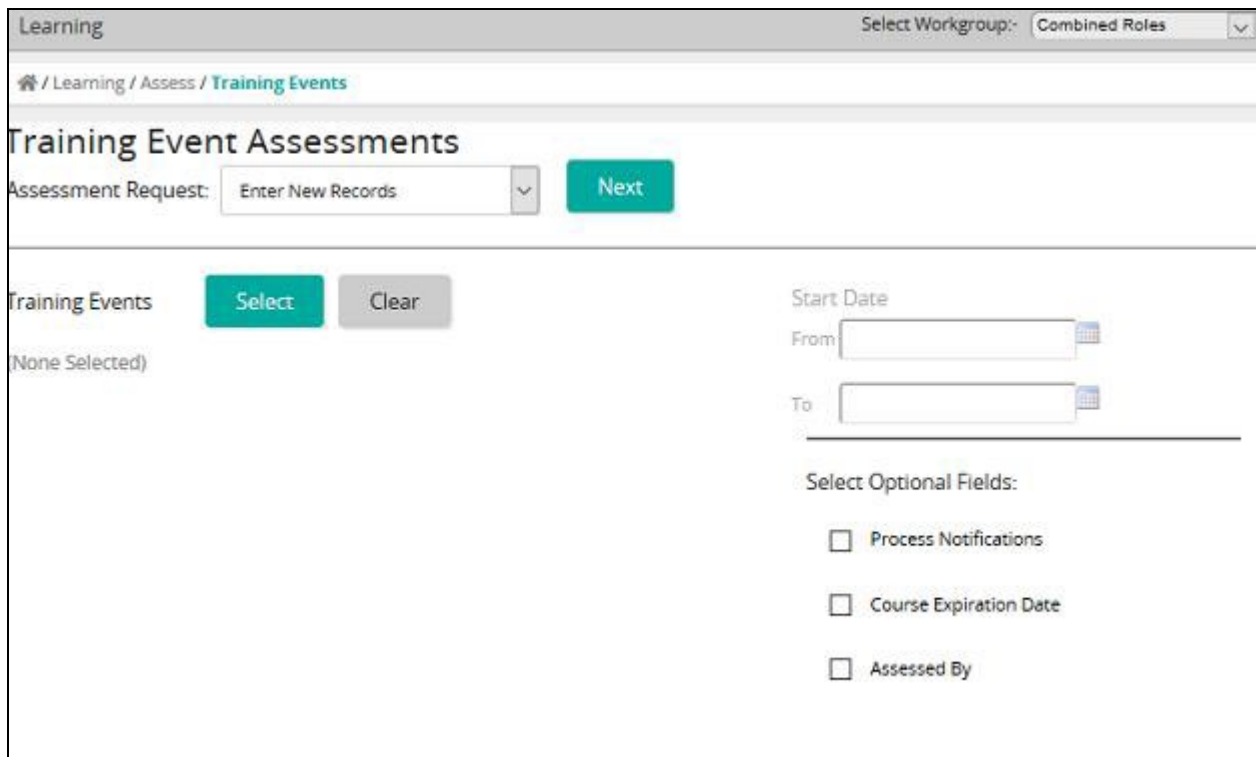
Assess Training Events

After a training event has been conducted, an administrator or training coordinator updates records for each student to include:

- Attendance for the course (completion)
- Scores (if applicable)
- Evaluations (if applicable)

All of this occurs from the **Training Event Assessments page** (page 113).

Training Event Assessments page



The screenshot shows the 'Training Event Assessments' page. At the top, there's a breadcrumb trail: / Learning / Assess / Training Events. The page title is 'Training Event Assessments'. Below the title, there's an 'Assessment Request:' section with a dropdown menu set to 'Enter New Records' and a green 'Next' button. To the left, there's a 'Training Events' section with a 'Select' button and a 'Clear' button. Below this, it says '(None Selected)'. To the right, there's a 'Start Date' section with 'From' and 'To' date pickers. Below that, there's a 'Select Optional Fields:' section with three checkboxes: 'Process Notifications', 'Course Expiration Date', and 'Assessed By'.

On the Training Event Assessment page, an administrator can assess training events for a student or students. An administrator can:

- Add new records
- Modify existing records
- Delete records

Administrators typically use this page to add, edit, or change marks for a training event.

Fields

Assessment Request: Select one of the following:

- Enter New Records
- Edit Existing Records
- Delete Existing Records

Training Events: Click **Select** to access the Training Events page where you can search for and select training events. Click **Clear** to remove the selected training events from the list.

Note: Past events are shown by default.

Start Date: To specify a from and to date range, click the calendar pop-up to select dates. (Only available when editing or deleting existing records.)

Select Optional Fields: Select any check boxes that may apply.

Enter, edit, or delete marks for a training event

1. From the navigation bar, click **Learning**.
2. Under Assess, click **Training Events**.

The **Training Event Assessments page** (page 113) opens.

3. From the Assessment Request drop-down box, select **Enter New Records, Edit Existing Records, or Delete Existing Records**.
4. From the Training Events column, click **Select**.
5. Click **Search** or filter the search by typing additional information into the filter boxes.
6. Select the check box of the training activity to be added to the Training Events list, then click **Confirm**.

Only one training event can be marked at one time.

Rival Learn automatically displays all enrolled students for the selected training event.

7. From the Select Optional Fields column, select one or more check box of the following optional fields,
 - Process Notifications – to control whether notifications will be triggered by the record.
 - Course Expiration Date – controls the time users may see the item on their training page.
 - Assessed By – to track who entered or modified the record for audit purposes.
8. Click **Next**.

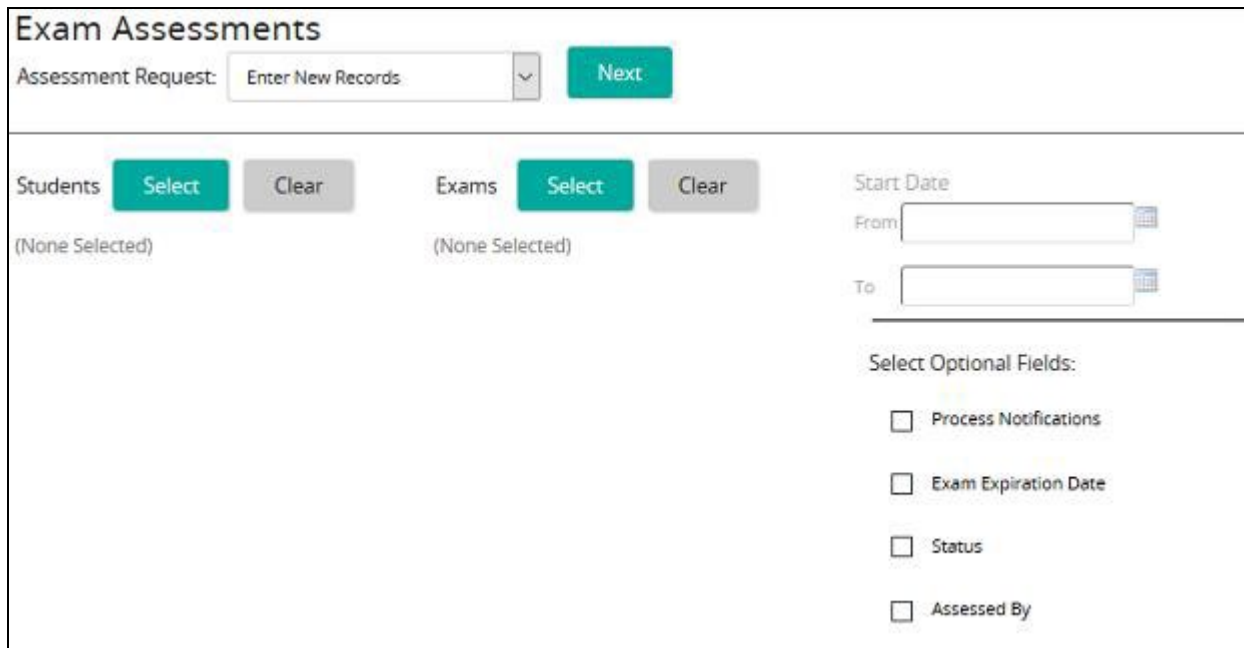
The Enter New Student Training Events Records page opens.

9. Under Start Date, click **Select Date** to select the start date.
10. Under Last Entered Date, click **Select Date** to choose the date last entered.
11. Under Mastered, select the check box if the student has mastered the training.
12. In the Mark text box, enter the percentage the student received.
13. Under Process Notifications, select the check box if the notifications were processed.
14. From the Attendance drop-down box, select the attendance of the student for the training.
15. In the Comment text box, type a comment.
16. Click **Save**.

Assess Exams

Similar to eCourses, an exam is usually automatically assessed when a student completes it and receives a score. However, if the system times out or a score needs to be edited, administrators or training coordinators can manually assess exams.

Exam Assessments page



The screenshot shows the 'Exam Assessments' page. At the top, there's a header 'Exam Assessments'. Below it, an 'Assessment Request:' section contains a dropdown menu with 'Enter New Records' selected and a 'Next' button. The main area is divided into three sections: 'Students' with 'Select' and 'Clear' buttons and '(None Selected)' text; 'Exams' with 'Select' and 'Clear' buttons and '(None Selected)' text; and 'Start Date' with 'From' and 'To' date pickers. Below these is a 'Select Optional Fields:' section with four checkboxes: 'Process Notifications', 'Exam Expiration Date', 'Status', and 'Assessed By'.

On the Exam Assessments page, an administrator can assess exams for a student or students. An administrator can:

- Add new records
- Modify existing records
- Delete records

Administrators typically use this page to quickly build an assessment table based on student exams.

Fields

Assessment Request: Select one of the following:

- Enter New Records
- Edit Existing Records
- Delete Existing Records

Students: Click **Select** to access the Students page where you can search for and select students. Click **Clear** to remove the selected students from the list.

Exams: Click **Select** to access the Exams page where you can search for and select exams. Click **Clear** to remove the selected exams from the list.

Start Date: To specify a from and to date range, click the calendar pop-up to select dates. (Only available when editing or deleting existing records.)

Select Optional Fields: Select any check boxes that may apply.

Enter, edit, or delete records for student exam assessments

1. From the navigation bar, click **Learning**.
2. Under Assess, click **Exams**.

The **Exam Assessments page** (page 115) opens.

3. From the Assessment Request drop-down box, select **Enter New Records, Edit Existing Records, or Delete Existing Records**.
4. From the Students column, click **Select**.
5. From the Students page, click **Search** or filter the search by typing additional information into the filter boxes.
6. Select the check box of the student to be added to the Students list, then click **Confirm**.
7. From the Exams column, click **Select**.
8. From the Exams page, click **Search** or filter the search by typing additional information into the filter boxes.
9. Select the check box of exam to be added to the Exams list, or click **Select All**, then click **Confirm**.
10. From the Select Optional Fields column, select the check box of the required fields, then click **Next**.

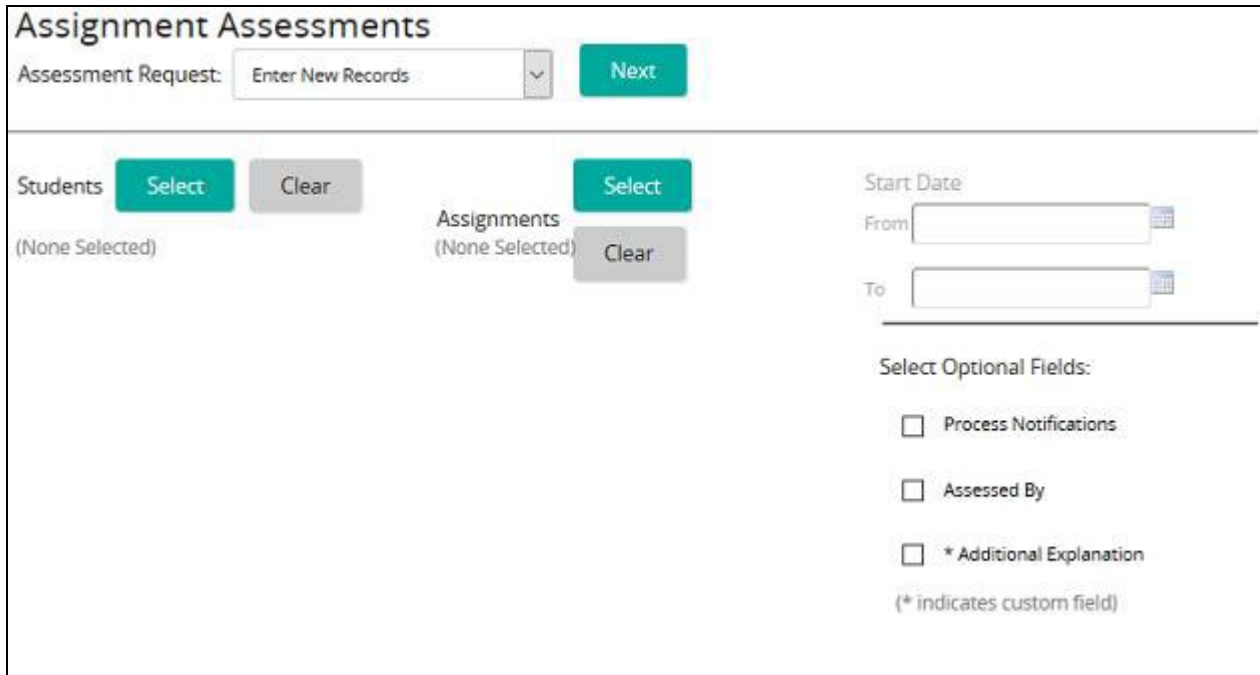
The Enter New Student Training Exams Records page opens.

11. Enter the appropriate exam session data for each student. When entering a new record, Start Date is a mandatory field.
12. Click **Fill Down** to copy the top value in the list for all students.
13. Click **Fill Down across Exams** to copy the top value in the list for all students and all exams.
14. Click **Save**.

Assess Assignments

Similar to training activities, administrators can quickly build an assessment table based on student assignments. Assessment fields include the Student mark, the date the assignment was completed and who marked the assignment.

Assignment Assessments page



The screenshot shows the 'Assignment Assessments' page. At the top, there is a header 'Assignment Assessments' and a form for 'Assessment Request' with a dropdown menu set to 'Enter New Records' and a 'Next' button. Below this, there are two main sections: 'Students' and 'Assignments'. The 'Students' section has a 'Select' button and a 'Clear' button, with '(None Selected)' below. The 'Assignments' section has a 'Select' button and a 'Clear' button, with '(None Selected)' below. To the right of these sections is a 'Start Date' section with 'From' and 'To' date pickers. Below the date pickers is a 'Select Optional Fields' section with three checkboxes: 'Process Notifications', 'Assessed By', and '* Additional Explanation'. A note below the checkboxes states '(* indicates custom field)'.

On the Assignment Assessments page, an administrator can assess assignments for a student or students. An administrator can:

- Add new records
- Modify existing records
- Delete records

Administrators typically use this page to quickly build an assessment table based on student assignments.

Fields

Assessment Request: Select one of the following:

- Enter New Records
- Edit Existing Records
- Delete Existing Records

Students: Click **Select** to access the Students page where you can search for and select students. Click **Clear** to remove the selected students from the list.

Assignments: Click **Select** to access the Assignments page where you can search for and select assignments. Click **Clear** to remove the selected assignments from the list.

Start Date: To specify a from and to date range, click the calendar pop-up to select dates. (Only available when editing or deleting existing records.)

Select Optional Fields: Select any check boxes that may apply.

Enter, edit, or delete records for student assignment assessments

1. From the navigation bar, click **Learning**.

2. Under Assess, click **Assignments**.

The **Assignments Assessments page** (page 117) opens.

3. From the Assessment Request drop-down box, select **Enter New Records, Edit Existing Records, or Delete Existing Records**.
4. From the Students column, click **Select**.
5. From the Students page, click **Search** or filter the search by typing additional information into the filter boxes.
6. Select the check box of the student to be added to the Students list, then click **Confirm**.
7. From the Assignments column, click **Select**.
8. From the Assignments page, click **Search** or filter the search by typing additional information into the filter boxes.
9. Select the check box of assignments to be added to the Assignments list, or click **Select All**, then click **Confirm**.
10. From the Select Optional Fields column, select the check box of the required fields, then click **Next**.
11. From the Enter New Student Assignment Records page, enter the appropriate assignment record data for each student. When entering a new record, Start Date is a mandatory field. When editing a record, apply edits to the appropriate fields.

The options for entry in the Mark field are governed by the grading type applied in the Assignment Properties sheet.

Records are considered "Mastered" only when the Mastered check box is selected. By default, Mastered is set to be on. Records without a Mastered check box enabled are considered incomplete and do not register as having a mastery date.

12. Click **Fill Down** to copy the top value in the list for all students.
13. Click **Fill Down across Assignments** to copy the top value in the list for all students and all assignments.
14. (Optional) When entering a new assignment or editing an existing one, click **Attach File** to add an attachment. Browse and find the file and double-click it. To add multiple attachments, repeat the browse/find/double-click procedure. Maximum file size for each uploaded document is 5 MB.
15. Click **Save**.

Student assignment records that have been saved can be viewed in a report in the Monitor section of Rival Learn.

Assess a checklist in the Administration Portal

Tip: A checklist can also be assessed in the Student Portal. Refer to Assess a checklist for details.

1. From the navigation bar, click **Learning**.
2. Under Assess, click **Assignments**.

The **Assignments Assessments page** (page 117) opens.

3. From the Assessment Request drop-down box, select **Edit Existing Records**.

4. In the Students column, click **Select**, select the student whose checklist needs to be assessed, and click **Confirm**.
5. In the Assignments column, click **Select**, select the assignment that contains the checklist, and click **Confirm**.
6. Click **Next**.
7. In the Checklist column, click the checklist icon in the record to display the checklist.
8. Assess the student as checklist tasks are demonstrated.
9. If you are:
 - Not finished assessing the checklist and want to come back later, click **Save** and click . The checklist status shows as In Progress on the Assess Checklist page in the Student Portal.
 - Completely finished assessing the checklist, click **Submit**. The checklist status shows as Completed on the Assess Checklist page in the Student Portal.

Tip: If a checklist has a required field (red asterisk), you cannot submit it until all required fields are completed.

Unsubmit a checklist

If a checklist is submitted in the Student Portal (has a Complete status) and you need to reset it so it can be edited, follow the steps here to unsubmit it.

1. From the navigation bar, click **Learning**.
2. Under Assess, click **Assignments**.
The **Assignments Assessments page** (page 117) opens.
3. From the Assessment Request drop-down box, select **Edit Existing Records**.
4. In the Students column, click **Select**, select the student whose checklist needs to be unsubmitted, and click **Confirm**.
5. In the Assignments column, click **Select**, select the assignment that contains the checklist, and click **Confirm**.
6. Click **Next**.
7. In the Checklist column, click the checklist icon in the record to display the checklist.
8. Click **Unsubmit**.
9. At the prompt, click **OK**.
10. Click **Save** and then close the window.

The checklist status in the Student Portal returns to In Progress. The checklist can now be edited.

Upload a digital record (attachment) to an existing student assignment record

1. From the navigation bar, click **Learning**.
2. Under Assess, click **Assignments**.
3. From the Assessment Request drop-down box, select **Edit Existing Records**.
4. From the Students column, click **Select** to search for and select the student.

5. From the Assignments column, click **Select** to search for and select the assignment that you want to add the attachment to.
6. From the Select Optional Fields column, select the check box of the required fields, then click **Next**.
7. From the Edit Student Assignment Records page, in the Assignment box, click .
8. Browse for and select a document to attach to this training record. The document's file size cannot exceed 256 KB.

Tip: After you select a file, you can view or download it by clicking .

9. Click **Save**.

View a digital record attached to an assignment record

1. From the navigation bar, click **Learning**.
2. Under Assess, click **Assignments**.
3. From the Assessment Request drop-down box, select **Edit Existing Records**.
4. From the Students column, click **Select** to search for and select the student.
5. From the Assignments column, click **Select** to search for and select the assignment that you want to add the attachment to.
6. From the Select Optional Fields column, select the check box of the required fields, then click **Next**.
7. From the Edit Student Assignment Records page, in the Assignment box, click .

The document opens in a viewer.

Tip: Click **Download** to download the attachment to your system.

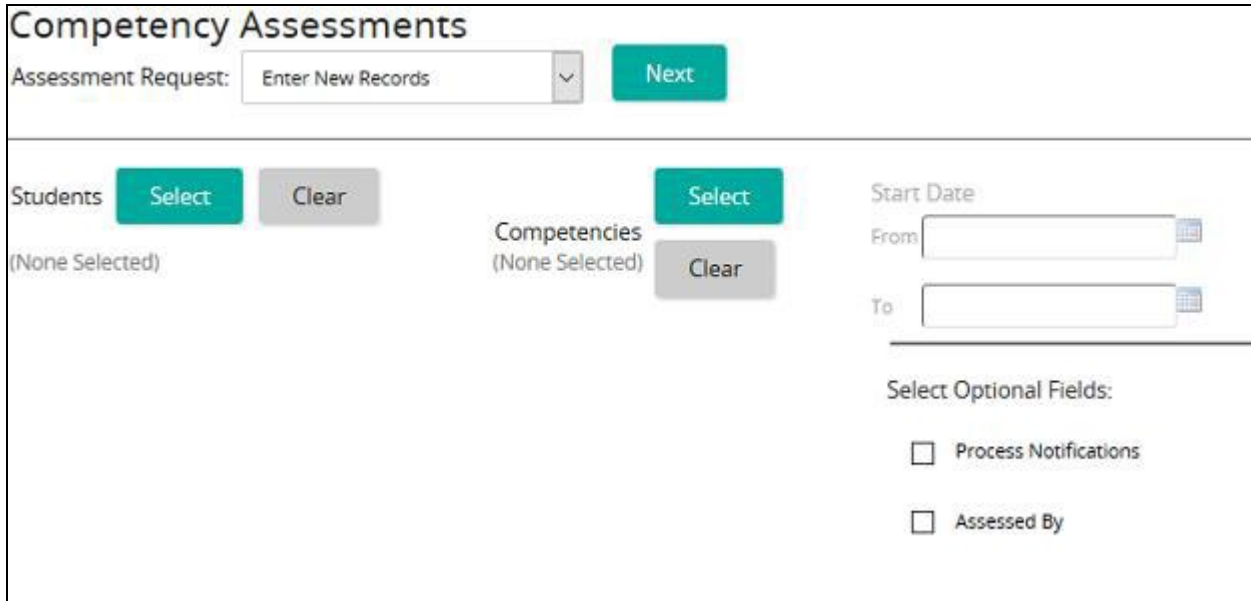
Delete a digital record attached to a student assignment record

1. From the navigation bar, click **Learning**.
2. Under Assess, click **Assignments**.
3. From the Assessment Request drop-down box, select **Edit Existing Records**.
4. From the Students column, click **Select** to search for and select the student.
5. From the Assignments column, click **Select** to search for and select the assignment that you want to add the attachment to.
6. From the Select Optional Fields column, select the check box of the required fields, then click **Next**.
7. From the Edit Student Assignment Records page, in the Assignment box, click .
8. At the prompt, click **OK**.

Assess Competencies

When a student successfully demonstrates or achieves a competency, an administrator or training coordinator updates the student's record. This typically includes updating the student mark (Complete/Incomplete), date the competency was completed, and who assessed the competency.

Competency Assessments page



The screenshot shows the 'Competency Assessments' page. At the top, there is a header 'Competency Assessments'. Below it, the 'Assessment Request' section has a dropdown menu with 'Enter New Records' selected and a 'Next' button. The main area is divided into three sections: 'Students' with a 'Select' button and a 'Clear' button, 'Competencies' with a 'Select' button and a 'Clear' button, and 'Start Date' with 'From' and 'To' date pickers. Below these is a 'Select Optional Fields' section with two checkboxes: 'Process Notifications' and 'Assessed By'.

On the Competency Assessments page, an administrator can assess competencies for a student or students. An administrator can:

- Add new records
- Modify existing records
- Delete records

Administrators typically use this page to quickly build an assessment table based on competencies.

Fields

Assessment Request: Select one of the following:

- Enter New Records
- Edit Existing Records
- Delete Existing Records

Students: Click **Select** to access the Students page where you can search for and select students. Click **Clear** to remove the selected students from the list.

Competencies: Click **Select** to access the Competencies page where you can search for and select competencies. Click **Clear** to remove the selected competencies from the list.

Start Date: To specify a from and to date range, click the calendar pop-up to select dates. (Only available when editing or deleting existing records.)

Select Optional Fields: Select any check boxes that may apply.

Enter, edit, or delete records for student competency assessments

1. From the navigation bar, click **Learning**.
2. Under Assess, click **Competencies**.

The **Competency Assessments page** (page 121) opens.

3. From the Assessment Request drop-down box, select **Enter New Records**, **Edit Existing Records**, or **Delete Existing Records**.
4. From the Students column, click **Select**.
5. From the Students page, click **Search** or filter the search by typing additional information into the filter boxes.
6. Select the check box of the student to be added to the Students list, then click **Confirm**.
7. From the Competencies column, click **Select**.
8. From the Competencies page, click **Search** or filter the search by typing additional information into the filter boxes.
9. Select the check box of competencies to be added to the Competencies list, or click **Select All**, then click **Confirm**.
10. From the Select Optional Fields column, select the check box of the required fields, then click **Next**.
11. From the Enter New Student Competency Records page, enter the appropriate competency record data for each student. When entering a new record, Start Date is a mandatory field. When editing a record, apply edits to the appropriate fields.

The options for entry in the Mark field are governed by the grading type applied in the Assignment Properties sheet.

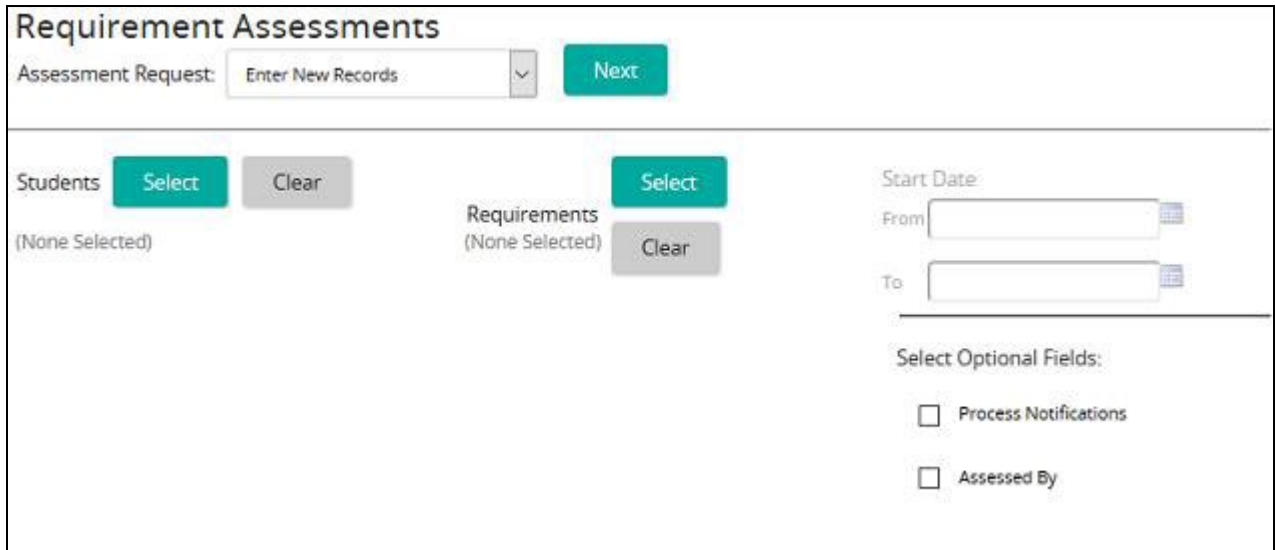
Records are considered "Mastered" only when the Mastered check box is selected. By default, Mastered is set to be on. Records without a Mastered check box enabled are considered incomplete and do not register as having a mastery date.

12. Click **Fill Down** to copy the top value in the list for all students.
13. Click **Fill Down across Competencies** to copy the top value in the list for all students and all competencies.
14. Click **Save**.

Assess Requirements

When a student successfully completes a requirement, an administrator or training coordinator updates the student's record. This typically includes updating the student mark (Complete/Incomplete), date the requirement was completed, and who assessed the requirement.

Requirement Assessments page



The screenshot shows the 'Requirement Assessments' page. At the top, there is a header with the title 'Requirement Assessments'. Below the header, there is a section for 'Assessment Request' with a dropdown menu currently set to 'Enter New Records' and a 'Next' button. Below this, there are two main sections: 'Students' and 'Requirements'. The 'Students' section has a 'Select' button and a 'Clear' button, with the text '(None Selected)' below. The 'Requirements' section has a 'Select' button and a 'Clear' button, with the text '(None Selected)' below. To the right of these sections, there is a 'Start Date' section with 'From' and 'To' date pickers. Below the date pickers, there is a 'Select Optional Fields' section with two checkboxes: 'Process Notifications' and 'Assessed By'.

On the Requirement Assessments page, an administrator can assess requirements for a student or students. An administrator can:

- Add new records
- Modify existing records
- Delete records

Administrators typically use this page to quickly build an assessment table based on requirements.

Fields

Assessment Request: Select one of the following:

- Enter New Records
- Edit Existing Records
- Delete Existing Records

Students: Click **Select** to access the Students page where you can search for and select students. Click **Clear** to remove the selected students from the list.

Requirements: Click **Select** to access the Requirements page where you can search for and select requirements. Click **Clear** to remove the selected requirements from the list.

Start Date: To specify a from and to date range, click the calendar pop-up to select dates. (Only available when editing or deleting existing records.)

Select Optional Fields: Select any check boxes that may apply.

Enter, edit, or delete records for student requirement assessments

1. From the navigation bar, click **Learning**.
2. Under Assess, click **Requirements**.

The **Requirement Assessments page** (page 123) opens.

3. From the Assessment Request drop-down box, select **Enter New Records**, **Edit Existing Records**, or **Delete Existing Records**.

4. From the Students column, click **Select**.
5. From the Students page, click **Search** or filter the search by typing additional information into the filter boxes.
6. Select the check box of the student to be added to the Students list, then click **Confirm**.
7. From the Requirements column, click **Select**.
8. From the Requirements page, click **Search** or filter the search by typing additional information into the filter boxes.
9. Select the check box of requirements to be added to the Requirements list, or click **Select All**, then click **Confirm**.
10. From the Select Optional Fields column, select the check box of the required fields, then click **Next**.
11. From the Enter New Student Requirement Records window, enter the appropriate requirement record data for each student. When entering a new record, Start Date is a mandatory field. When editing a record, apply edits to the appropriate fields.

The options for entry in the Mark field are governed by the grading type applied in the Assignment Properties sheet.

Records are considered "Mastered" only when the Mastered check box is selected. By default, Mastered is set to be on. Records without a Mastered check box enabled are considered incomplete and do not register as having a mastery date.

12. Click **Fill Down** to copy the top value in the list for all students.
13. Click **Fill Down across Requirements** to copy the top value in the list for all students and all requirements.
14. Click **Save**.

Assess Course Continuing Education Credits (CEUs)

With Rival Learn, administrators can record and track Continuing Education Credits for training activities and eCourses, which are defined in the system. Course CEUs can be assigned to any course record in the system.

Student Course CEUs page

Search

Clear

Student

Course

Student Course CEUs

Search

Student +	Course +	Mark (%)	Mastery Date +	
Barton, Terry	Customer Service Procedures	100	10-Jun-2019	
Barton, Terry	DAY1-01 Orientation Module 1		31-May-2011	
Barton, Terry	DAY1-02 Orientation: Benefits		31-May-2011	
Barton, Terry	New Hire Safety Online Course			
Barton, Terry	New Hire Safety Online Course	100	31-May-2011	
Barton, Terry	Sexual Harassment Policies Course	100	31-May-2011	
Baxter, Michael	DAY1-01 Orientation Module 1		31-May-2011	
Baxter, Michael	DAY1-02 Orientation: Benefits		31-May-2011	

The Student Course CEUs page shows student course records. You can search for a particular course record, select it, and then assign CEU values.

Student Course CEUs Properties page

STUDENT COURSE CEU PROPERTIES

Save Refresh

QUALITY ASSURANCE

Student *

Barton, Terry

Course *

Customer Service Procedures

Mark

100%

Mastery Date

10-Jun-2019

CEUs

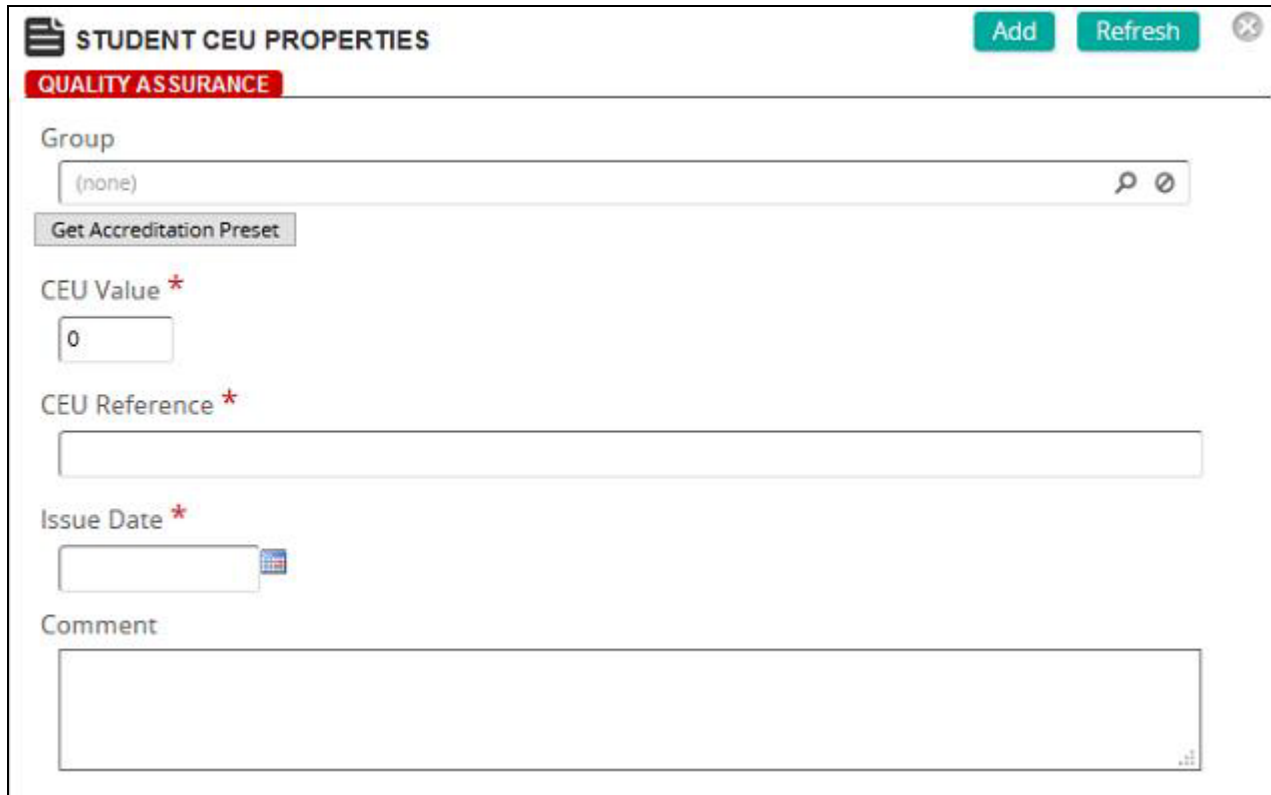
Group	CEU Value	CEU Reference	Issue Date
(none)			

Total: 0

The Student Course CEUs Properties page shows details about a particular student course CEU.

The fields on this page are read-only. The Add button displays the **Student CEU Properties page** (page 126), where you can add CEUs to a course record.

Student CEU Properties page



Fields

Group: Groups are used to modify the default CEU values set in the course properties. The CEU Matrix can be used to establish different CEU values based on a Group membership. Click  to search for and select a group.

CEU Value: Type the CEU value or click **Get Accreditation Preset** to use the default CEU settings.

CEU Reference: Type the CEU reference or click **Get Accreditation Preset** to use the default CEU settings.

Issue Date: Select the date from the calendar pop-up for the CEU credit. The default is the current date.

Comment: Type any comments to describe the student CEU.

Add a CEU credit to a course record

1. From the navigation bar, click **Learning**.
2. Under Assess, click **Course CEUs**.

The **Student Course CEUs page** (page 125) opens.

3. Click **Search** or filter the search by typing additional information into the filter boxes.
4. In the list beside a student, click  and then click **Properties**.

The **Student Course CEU Properties page** (page 125) opens.

- From the **CEUs** box, click **Add**.

The **Student CEU Properties page** (page 126) opens.

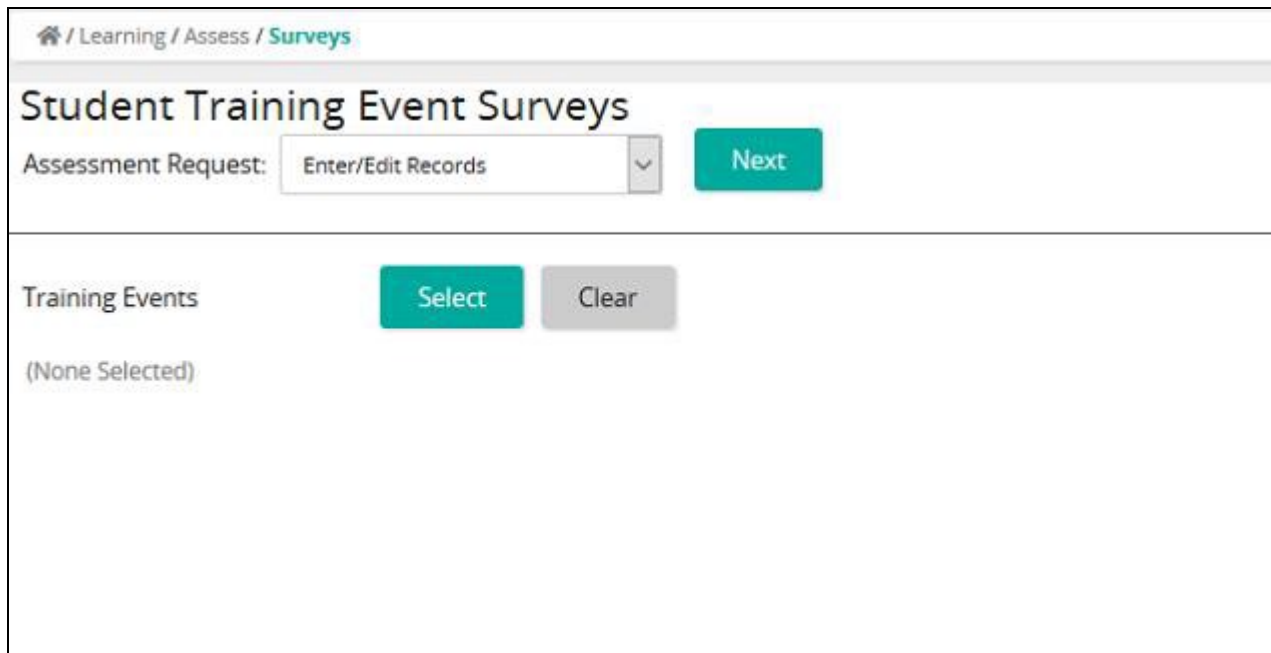
- Complete the fields as appropriate.
- Click **Add**.
- From the **Student Course CEU Properties page** (page 125), click **Save**.

The credit is added to the course record.

Assess Surveys

When a survey is associated with a training event, survey responses must be manually entered into Rival Learn. Administrators or training coordinators enter student survey responses into Rival Learn.

Student Training Event Surveys page



On the Student Training Event Surveys page, an administrator can:

- Enter survey data for a training event
- Modify survey data for a training event
- Delete survey data for a training event

Fields

Assessment Request: Select one of the following:

- Enter/Edit Records
- Delete Existing Records

Training Events: Click **Select** to access the Training Events page where you can search for and select training events. Click **Clear** to remove the selected training events from the list.

Note: Past events are shown by default.

Enter survey results for a specific training event

1. From the navigation bar, click **Learning**.
2. Under Assess, click **Surveys**.

The **Student Training Events Surveys page** (page 127) opens.

3. From the Assessment Request drop-down list, select **Enter/Edit Records**.
4. From Training Events, click **Select**.
5. From the Training Events page, click **Search** or filter the search by typing additional information into the filter boxes.
6. Click **Select All** or select the check box of the training activity to be added to the Training Events list, then click **Confirm**.
7. Click **Next**.

The Edit Student Survey Results page opens.

Survey data can be entered for each enrolled student if the data is to be stored for the specific student, or the data can be entered as an "Anonymous" user if the data is not required to be associated to a specific user.

8. Under Surveys, select a survey.
9. From the Student drop-down box, select a student to enter data for a specific student or select **Anonymous** to enter data without saving the data for a specific student.
10. Click **Save**.
11. Select another survey from the list or click **Back**.

Deleting a student record

Student records should only be deleted based on entry errors. Administrator users should be restricted in their ability to delete records by adjusting administration privilege.

Deleted records in Rival Learn remain in the system for audit purposes but are marked as deleted so they do not appear in student records or reports.

Deactivate student record notifications

Creating or modifying a record triggers an event that initiates any defined and enabled training activity completion notifications.

To deactivate this trigger and cancel any associated completion notifications, perform the follow steps:

1. From the navigation bar, click **Learning**.
2. Under Assess, click **Surveys**.

The **Student Training Events Surveys page** (page 127) opens.

3. From the Assessment Request drop-down list, select **Delete Existing Records**.
4. From Training Events, click **Select**.
5. From the Training Events window, click **Search** or filter the search by typing additional information into the filter boxes.

6. Click **Select All** or select the check box of the training activity to be added to the **Training Events** list, then click **Confirm**.
7. Click **Next**.
8. On the Delete Student Survey Results page, under **Surveys**, select a survey.
9. Click **Save**.
10. Select another survey from the list or click **Back**.

Deactivating notifications using the Process Notifications function does not disable any associated recertification notifications linked to the record through a qualification.

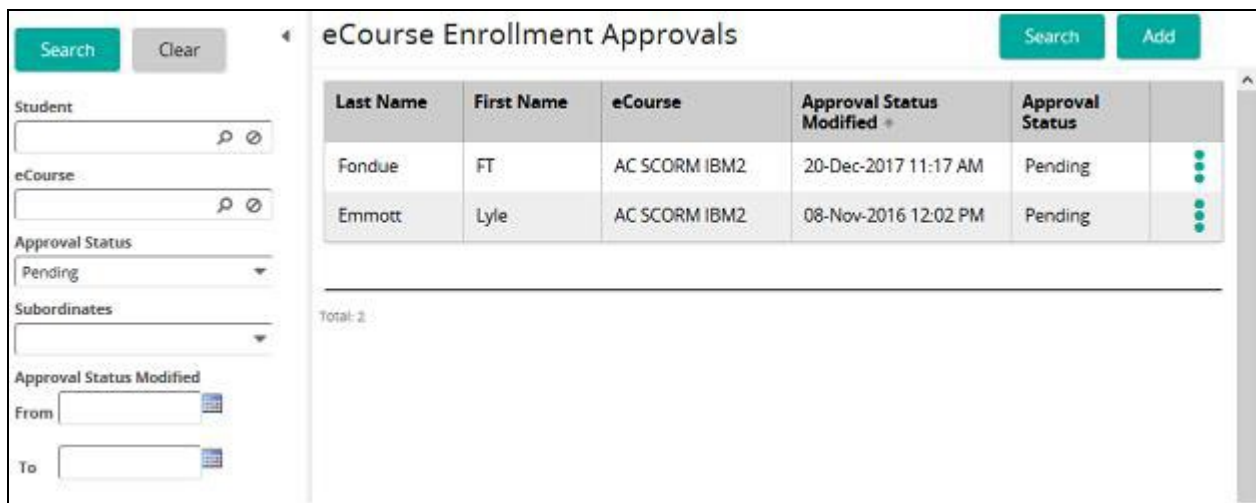
Approve

Training events set as Enrollment Approval Required provide the ability for a privileged administrator to manage enrollments without requiring edit privilege on the training event properties. Rival Learn can be configured to allow approving enrollment requests and adding enrollments to training events.

eCourses

eCourse approvals allow administrator users access to define workgroup privileges.

ECourse Enrollment Approvals page



Last Name	First Name	eCourse	Approval Status Modified	Approval Status
Fondue	FT	AC SCORM IBM2	20-Dec-2017 11:17 AM	Pending
Emmott	Lyle	AC SCORM IBM2	08-Nov-2016 12:02 PM	Pending

Total: 2

On the eCourse Enrollment Approvals page, administrators can view a list of eCourse enrollment approvals in Rival Learn. Administrators can also:

- Add eCourse enrollment approvals
- View eCourse enrollment approval properties
- Delete eCourse enrollment approvals

ECourse Enrollment Approval Properties page



Fields

Student: Click  to display the Students page to search for and select a student.

eCourse: Click  to display the eCourses page to search for and select an eCourse.

Approval Status: Select either **Approved** or **Pending**.

Approval Status Comment: Type an approval comment.

Add an eCourse approval

1. From the navigation bar, click **Learning**.
2. Under Approve, click **eCourses**.

The **ECourse Enrollment Approvals page** (page 129) opens.

3. Click **Add**.

The **eCourse Enrollment Approval Properties page** (page 130) opens.

4. Select a student and an eCourse.
5. Select an approval status.
6. (If applicable) Type a comment to describe the approval.
7. Click **Add**.

Training events

Some training requires approval before a student can enroll in the training. Administrators or other users with appropriate permissions can approve training enrollments for eCourses and training events.

Training Event Enrollment Approvals page



On the Training Event Enrollment Approvals page, you can view a list of training event enrollments that require approval. You can also:

- Add training event enrollment approvals
- View training event enrollment approval properties
- Delete training event enrollment approvals

Training Event Enrollment Approval Properties page



Fields

Student: Click  to display the Students page to search for and select a student.

Training Event: Click  to display the Training Events page to search for and select a training event.

Approval Status: Select either **Approved** or **Pending**.

Approval Status Comment: Type an approval comment. If notifications are set up, the comment is included in an email to the student, indicating approval for the activity.

Add a training event enrollment approval

1. From the navigation bar, click **Learning**.
2. Under Approve, click **Training Events**.

The **Training Event Enrollment Approvals page** (page 131) opens.

3. Click **Add**.

The **Training Event Enrollment Approval Properties page** (page 131) opens.

4. Select a student and a training event.
5. Select an approval status.
6. (If applicable) Type a comment to describe the approval.
7. Click **Add**.

Approve an enrollment

1. From the navigation bar, click **Learning**.
2. Under Approve, click **Training Events**.

The **Training Event Enrollment Approvals page** (page 131) opens.

3. Search for the student enrollment that requires approval.
4. For the specific student enrollment you want to approve, click  and then click **Approve and Enroll**.
5. (If applicable) On the pop-up window, click in the Comment box, type a comment, and press **Enter**.

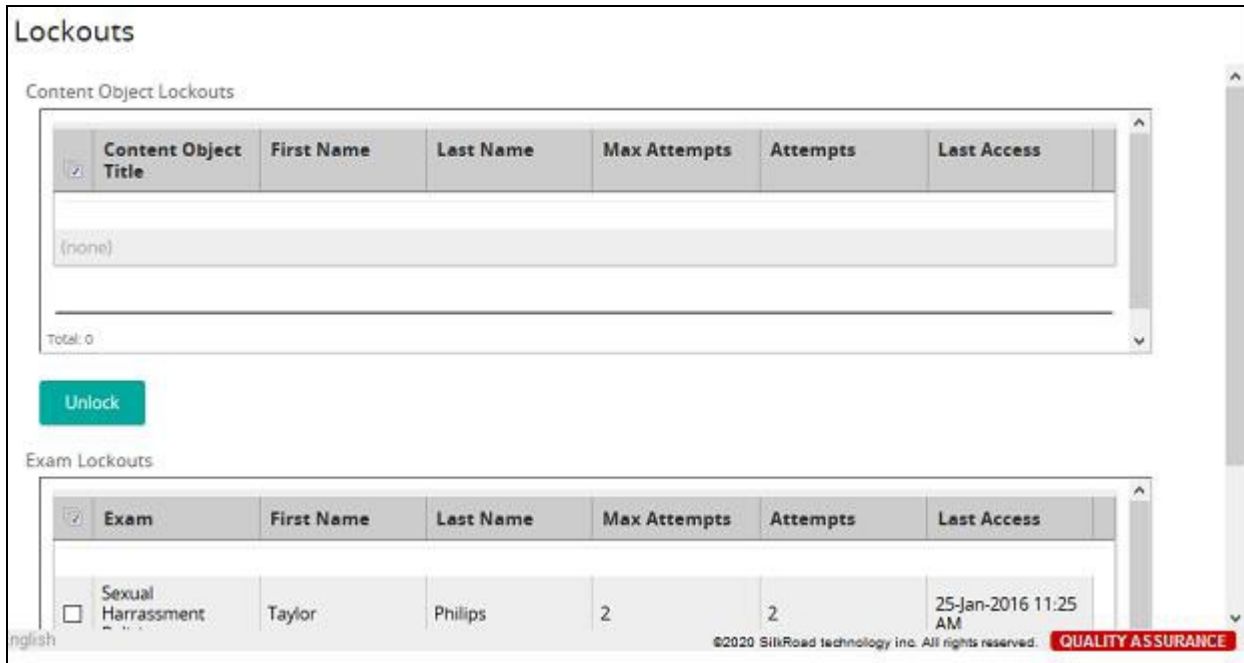
Tip: If notifications are set up, the comment is included in an email to the student, indicating approval for the activity.

6. Click **Approve**.

Lockouts

In Rival Learn, you can set the maximum attempts on either exams or AICC/SCORM content objects. Students attempting to access the exam or content object more than the Max Attempts value are locked out of the object and cannot access the object until a privileged administrator unlocks their access. Students are prompted to contact an administrator to have the item unlocked.

Lockouts page



The screenshot shows the 'Lockouts' page with two main sections: 'Content Object Lockouts' and 'Exam Lockouts'.

Content Object Lockouts: This section contains a table with the following columns: ☒ (Select All), Content Object Title, First Name, Last Name, Max Attempts, Attempts, and Last Access. The table is currently empty, showing '(none)' in the Content Object Title column. Below the table, it says 'Total: 0'. There is an 'Unlock' button below the table.

Exam Lockouts: This section contains a table with the following columns: ☐ (Select All), Exam, First Name, Last Name, Max Attempts, Attempts, and Last Access. The table has one row: ☐ Sexual Harrassment, Taylor, Philips, 2, 2, 25-Jan-2016 11:25 AM. Below the table, it says '©2020 SilkRoad technology inc. All rights reserved.' and 'QUALITY ASSURANCE'.

The Lockouts page shows the users who are locked out of exams and content objects. A privileged administrator can unlock a user.

Content object lockouts appear in the Content Object Lockouts list. It is sorted by content object title, last name, and then first name. Exam lockouts appear in the Exam Lockouts list. It is sorted by exam name, last name, and then first name.

Unlock a user

1. From the navigation bar, click **Learning**.
2. Under Approve, click **Lockouts**.

The **Lockouts page** (page 133) opens.

3. To unlock:
 - A content object for a specific user, select the user in the Content Object Lockouts list
 - A content object for all listed users, click the **Select All** check box in the Content Object Lockouts list
 - An exam for a specific user, select the user in the Exam Lockouts list
 - An exam for all listed users, click the **Select All** check box in the Exam Lockouts list
4. Click **Unlock**.

Monitor Reports

Administrators can generate and monitor a variety of reports. They can also create custom reports using Microsoft SQL Reporting (rdl) and import into Rival Learn. Once a report has been created, sorting filters can be assigned and saved within the report. This provides rapid report generation on demand, simplifying the workload for individuals responsible for *generating* the report, rather than *creating* it.

Reports can also be restricted to users within Administrative Workgroups, allowing appropriate access privilege to individuals responsible for report generation. Reports can also be restricted to specific students based on membership criteria or based on whether the student user has a supervisor role in the system.

Reports page

The Reports page lists reports most commonly used by Rival Learn administrators. On this page, you can search for, view, and monitor the following types of reports:

- System reports
- Custom reports

System reports are reports provided as part of the Rival Learn reporting system. For a list of reports, refer to **System Reports** (on page 143).

Custom reports are reports that you create using MS SQL Reporting software.

Report Properties page

On the Report Properties page, you define the properties for a report.

Fields

Name: Type the name for the report.

Description: Type a description for the report.

Type: Select one of the following:

- **Custom** if the report is a custom created report from MS SQL Reporting
- **System** if the report is to be linked to a Rival Learn system report

Filename: If you selected Custom in the Type box, click **Add File** to upload a report.

System Report: If you selected System in the Type box, click  to search for and select a system report. For a list of reports, refer to **System Reports** (on page 143).

Enabled as Source: Do one of the following:

- Select this check box to enable viewing this report for all users with privilege to the Company Reports or My Reports tab. All enabled reports appear in the Report Search list when users Add a new Company Report from the Company Reports tab or a User report on their My Reports tab.
- Do not select this check box to hide the report from the Company Reports and My Reports tab and the Report Search list.

Personal Use Restricted to Assigned Workgroups: Select this check box to restrict access to this report to specific workgroups defined in the system with privilege to the Company Reports or My Reports tab. Assigned workgroups are the only users who will have access to this report. Any Enabled report restricted to specific workgroups can be viewed in the Report Search list when members of the restricted workgroup add a new Company Report or User report to their My Reports tab.

Otherwise, leave this check box unselected.

Add a report

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **Reports**.

The **Reports page** (page 134) opens.

3. Click **Add**.

The **Report Properties** page (page 134) opens.

4. Type a name and description for the report.
5. In the Type drop-down box, select **Custom** or **System**.
6. Complete remaining fields as appropriate.
7. Click **Add**.

Company Report

A Company Report is a report created from any enabled report in the system. A company report can be created as either a:

- Student report
- Administration report
- Scheduled report

Student reports appear in Training Reports on the student homepage, or as a My Report in the My Reports tab for Administrator access.

Administration reports are reports "pushed" to the My Reports tab by an administrator with privilege to the Company Reports tab.

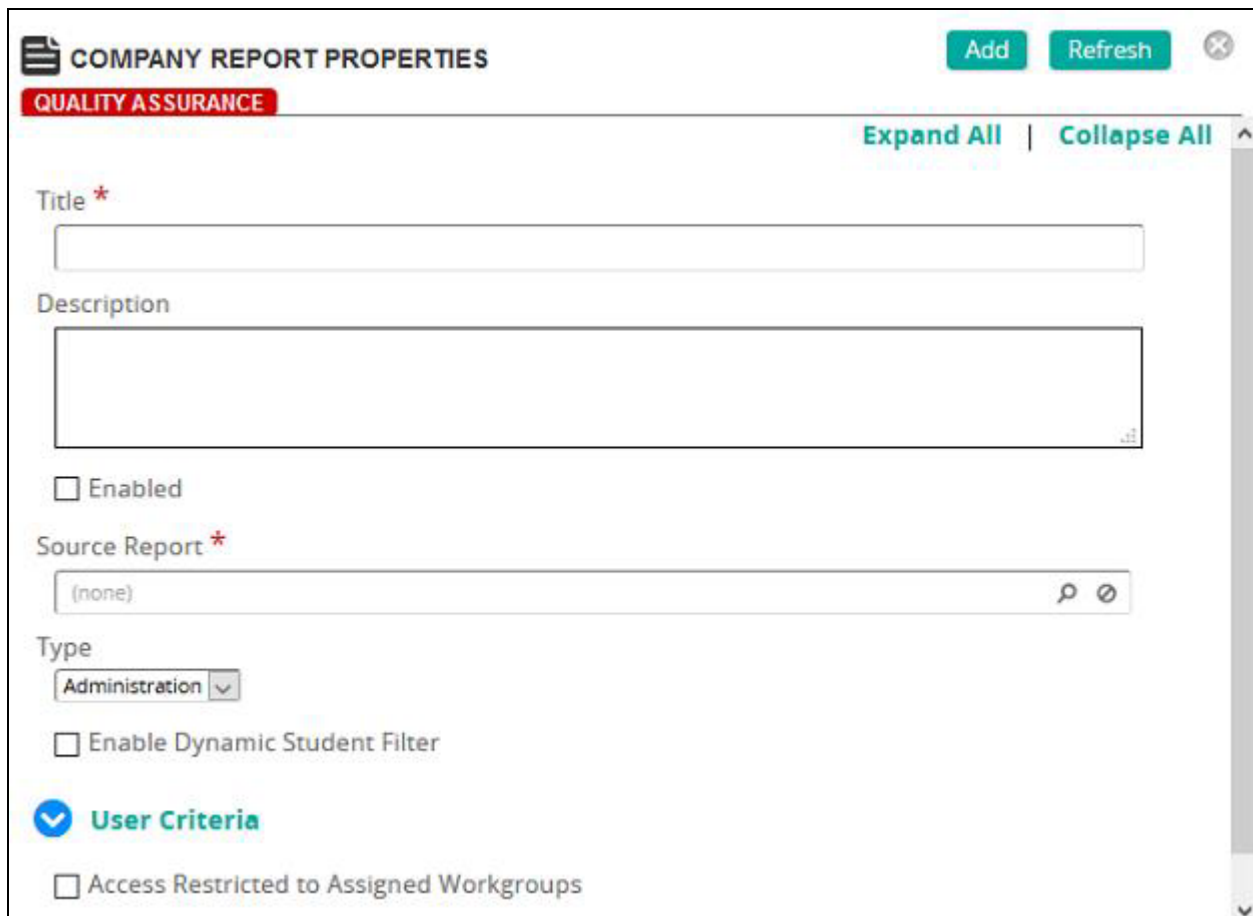
Scheduled reports are reports that are scheduled to run at a specific time on a specific day.

Company Report page

Company Reports					
Title	Description	Enabled	Source Enabled	Type +	
GL Course Certificate		Yes	Yes	Administration	
GL Student History		Yes	Yes	Administration	
test SCORM Report		Yes	Yes	Administration	
GL Qualification Status by Student		Yes	Yes	Administration	
GL Exam Results		Yes	Yes	Administration	
My eCourse Activity Report		Yes	Yes	Administration	
GL Qualification Status by Intervention		Yes	Yes	Administration	
GL Recertification Report By Student		Yes	Yes	Administration	
Supervisor Training History		Yes	Yes	Student	

The Company Report page lists reports that have been shared with administrators (who have access) and students.

Company Report Properties page



COMPANY REPORT PROPERTIES Add Refresh

QUALITY ASSURANCE Expand All | Collapse All

Title *

Description

☐ Enabled

Source Report *

(none)

Type

Administration

☐ Enable Dynamic Student Filter

☒ User Criteria

☐ Access Restricted to Assigned Workgroups

On the Company Report Properties page, you define the properties for a company report. The fields on this page vary based on the type of report selected.

Fields

Title: Type the title for the company report.

Description: Type a description for the company report.

Enabled: Select this box to enable the report for viewing as an administration report in the My Reports tab for all privileged Administrator users. For scheduled reports, select this check box to enable the report to run or leave unchecked to disable the scheduled report.

Source Report: Click  to search for and select an existing report to be used as the source to generate the report.

Type: Select one of the following:

- Administration
- Student
- Scheduled

The selection you make controls the remaining fields on this page.

Enable Dynamic Student Filter: (Administration) Select this box if the report is to be used to generate data dynamically for a group of students. Dynamically filtered reports are administration reports "pushed" to the My Reports tab by an administrator with privilege to the Company Reports tab. Dynamically filtered reports can be used to generate a report for a list of students.

Access Restricted to Assigned Workgroups: (Administration) Select this box if you want the report to be restricted to specific workgroups. Select the workgroup or workgroups from the Available list and move them to the Assigned list.

Direct Link: (Student or Scheduled): A system-generated direct link to this company report. You can copy this link and provide to supervisors so that they can link to a report, which is filtered by their direct reports.

Note: For the direct link to work, a user must be authenticated.

Filters: (Student) Select one of the following:

- None
- Filter by Current Student
- Filter by Current Supervisor

Assign To: (Student) Select one of the following:

- **All Students:** Allows all students access to the company report.
- **Student Criteria:** Displays additional fields to use to restrict access. You can restrict which students can access this report by job, organization, group, and job category.

Starting: (Scheduled) From the calendar and time pop-ups, select the day and time when the server is to run the scheduled report.

Note: Starting time is an approximate time when the server schedules the report to run. If the job queue is busy at that time, the starting time may be delayed slightly.

Scheduled to Run: (Scheduled) Select a schedule option. Options are:

- **Once:** The report runs once on the day and at the time indicated.
- **Once a Day:** The report runs once a day (Monday through Sunday) at the time indicated.
- **Once a Weekday:** The report runs once a weekday (Monday through Friday) at the time indicated.
- **Once a Week:** The report runs once a week based on the starting date at the time indicated. For example, if you want a report to run once a week on Wednesdays, the starting date must be a Wednesday. If you want a report to run on a weekend day, the starting date must be either a Saturday or Sunday.
- **Once a Month:** The report runs once a month based on the starting data at the time indicated. For example, if you want a report to run on the 7th of each month, the starting date must be the 7th.

Download Link: (Scheduled) This is the link for the scheduled report. It can be passed to users in email, through a notification, or copied and pasted. The link is secure in that only authenticated Rival Learn users who have permissions can view the report.

Note: The message, Unavailable until the report has been added, appears when you are adding the scheduled report for the first time. The message is removed after the report is added.

Run Now: (Scheduled) Click this button to run the scheduled report now. This option overrides the scheduled time and runs the report on demand.

Note: Running the report on demand does not change or prevent the report from running at its scheduled time.

Download Latest: (Scheduled) Click this button to download the latest version of the report. You can open the link or save it to your desktop. If this button is not available, the scheduled report has not run yet.

FTP Folders: (Scheduled) If you want this scheduled report to save to a FTP folder, select the folder from the Assigned list and move it to the Available list.

Notification Rule: (Scheduled) If you want notifications to occur for this scheduled report, click **Add** and then select the notification rule from the Notifications page.

User Criteria

Access Restricted to Assigned Workgroups: This check box controls whether the report is restricted to users assigned to a specific workgroup. If selected, this report is restricted to users in the specific workgroup or workgroups. If not selected, any authenticated Rival Learn user has access to this report.

Workgroup: To assign workgroups, click a workgroup or workgroups from the Available list and use the arrow buttons to move them to the Assigned list.

Create an Administration Report

Creating an Administration Report creates a version of an enabled report to appear in the My Reports tab. This allows administrators to set specific filters and titles, and then save a version of the report to the My Reports tab for all company users or specific users based on a workgroup assignment.

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **Company Reports**.

The **Company Reports page** (page 135) opens.

3. Click **Add**.

The **Company Report Properties page** (page 136) opens.

4. Type and title and description for the company report.
5. Select the **Enabled** check box to enable the report for viewing as an Administration report in the My Reports tab for all privileged Administrator users.
6. In the Source Report box, search for and select the source report.
7. From the Type drop-down box, select **Administration**.
8. Select the **Enable Dynamic Student Filter** check box if the report is to be used to generate data dynamically for a group of students.
9. Select the **Access Restricted to Assigned Workgroups** check box if the report is to be restricted to specific workgroups. Then from the Workgroups section, select from the Available list and move them to the Assigned list.
10. Click **Add**.

Set and save filters for an Administration Report

After an Administration report is created, you can set filters to make it easier for administrators to run it.

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **Company Reports**.

The **Company Reports page** (page 135) opens.

3. Search for the report you want.
4. In the list beside a report, click  and then click **Preview**.

The Report Filter window opens.

5. Set the filters for the report to the appropriate settings for the report.
6. From the Report Format drop-down box, select the format of the report.
7. Click **Generate** to preview the report and validate the correct filter settings for the Administration report.
8. Click **Save** to save the filter for this report version.

The Administration Report filters are now set to be the saved settings. By default, users generating this report in their My Reports tab will have the filters set to be the same as the filters saved in the Company Reports tab.

Create a dynamic student filter for an Administration Report

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **Company Reports**.

The **Company Reports page** (page 135) opens.

3. Click **Search** or filter the search by typing additional information into the filter boxes.
4. In the list beside a report, click  and then click **Properties**.

The **Company Report Properties page** (page 136) opens.

5. Click the **Enable Dynamic Student Filter** check box to activate.
6. Click **Save**.

Dynamic Student Filter Administration Report

Dynamic Student Filter Administration Reports are reports "pushed" to the My Reports tab by an administrator with privilege to the Company Reports tab to generate a report for a list of students. They appear in the lower half of the My Reports tab.

If Data View Restrictions have been applied for your selected Administration role, the student filters will be restricted to only those students you have privilege to view.

Scheduled reports

Scheduled reports are Rival Learn-generated reports that run on a specific day at a specific time. The reports are available to authenticated Rival Learn users with privileges to view them.

With scheduled reports, you can:

- Run reports at off-peak hours and save system resources during high volume work hours
- Get a snapshot of data at a specific time and date
- Get easy access to a specific report via a notification link
- Export data that can then be accessed and absorbed into other systems

A Rival Learn administrator creates scheduled reports on the Company Reports page.

Viewing scheduled reports

Authenticated Rival Learn users with permissions view scheduled reports via a link. After a scheduled report runs, the link is available:

- On the Company Reports page
- Via a notification (if set up)
- By copying and pasting the link into a browser

Date and time stamp in file name and on report footer

The date and time stamp appear in the file name and report footer.

- Report file name convention is: `[report name]_year_month_day_server time_UTC.pdf`.
- Report footer format is: `day-month-year time`

Reports are scheduled in company time when set up on the Company Report Properties page. However, reports *generate* in server time. This means the report footer shows server time but the report actually ran at the correctly scheduled company time.

Notifications

Notifications are used to alert applicable Rival Learn users and Rival Learn administrators that a scheduled report generated. Notifications can also be used to alert administrators that a scheduled report did not generate. The two event types that provide scheduled report notifications are:

- Scheduled Reports Failed
- Scheduled Reports Run

Create a scheduled report

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **Company Reports**.

The **Company Reports page** (page 135) opens.

3. Click **Add**.

The **Company Report Properties page** (page 136) opens.

4. Type a title and description for the company report.
5. Select the **Enabled** check box to enable the report for viewing as an Administration report in the My Reports tab for all privileged Administrator users.
6. In the Source Report box, search for and select the source report.
7. From the Type drop-down box, select **Scheduled**.
8. Click the Start Time boxes to select a start date and start time from the pop-ups.
9. In the Scheduled to Run drop-down list, select an option.
10. (If applicable) Under FTP Folders, to assign FTP folders for this scheduled report to save to, select folders from the Available list and move them to the Assigned list.
11. (If applicable) Under Notification Rule, click **Add** to search for and select a notification rule for this report.

12. Under User Criteria, select the **Access Restricted to Assigned Workgroups** check box if the report is to be restricted to specific workgroups. Then from the Workgroups section, select from the Available list and move them to the Assigned list.

13. Click **Add**.

Run a scheduled report on demand (now)

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **Company Reports**.

The **Company Reports page** (page 135) opens.

3. Search for the scheduled report.
4. In the list beside a scheduled report, click  and then click **Properties**.

The **Company Report Properties page** (page 136) opens.

5. Under Direct Link, click **Run Now**.

A Running Report message appears. When done, a Report Ready message appears.

6. Click **Download Latest**.

The report is viewable if you are an authenticated Rival Learn user with permissions.

View a scheduled report

After a scheduled report runs, an authenticated Rival Learn user with permission can view the report by using the report link. The link is typically in an email sent through an event notification. It is also shown on the Company Report Properties page for the specific scheduled report.

1. Open the email containing the report link or access the scheduled report on the Company Reports Properties page.
2. Copy the link and paste it into a browser window.
3. (If applicable) Enter your Rival Learn user ID and password.

The report is displayed.

Defining Student Company Reports

The Company Reports tab provides the ability to add student reports defined in the Company Reports tab to a list of reports made available on the Student homepage.

Add a Student Report

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **Company Reports**.

The **Company Reports page** (page 135) opens.

3. Click **Add**.

The **Company Report Properties page** (page 136) opens.

4. Type and title and description for the company report.
5. Do not select the Enabled check box until the Report filters have been saved.

6. In the Source Report box, search for and select the source report.
7. From the Type drop-down box, select **Student**.

Note: Only reports ENABLED in the Reports Tab may be added as a student Report.

8. Click **Add**.
9. On the **Company Reports** page, search for the student report.
10. In the list beside a report, click  and then click **Preview**.

The report filter window opens.

11. Set the filters for the report to the appropriate settings for the Student report.
12. Click **Generate** to preview the report and validate the correct filter settings for the student report.
13. Click **Save** to save the filter and any title as appropriate for this Student Report version.
14. From the Company Reports window, click **Search** to search for the saved report.
15. In the list beside a report, click  and then click **Properties**.

The **Company Reports Properties page** (page 136) opens.

16. Select **Enabled** check box to enable viewing of this report in the student homepage.
17. Click **Save**.

Restrict Student Reports to a specific student group or groups

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **Company Reports**.

The **Company Reports page** (page 135) opens.

3. Click **Search** or filter the search by typing additional information into the filter boxes.
4. In the list beside a report, click  and then click **Properties**.

The **Company Reports Properties page** (page 136) opens.

5. Under User Criteria from the Assign To drop-down box, select **Student Criteria**.
6. Select the combination of student criteria by adding a **Job, Groups, Organizations**, and/or **Job Categories**. The student report will ONLY be displayed to those students who meet the combination of criteria set here.
7. Click **Save**.

Restricting Supervisor Reports

Administrator workgroups provide the ability to restrict members to only be able to view subordinate data. This new Data View Restriction setting provides the ability to set restrictions to either ALL Subordinates, or IMMEDIATE Subordinates. Setting Data View Restrictions to ALL Subordinates means Supervisors may see user data for all subordinates in the Supervisor hierarchy defined company-wide. Selecting IMMEDIATE means Supervisors may only see user data for their immediate subordinates.

A Company Report definition can define a Student report that will only appear for users with a Supervisor role and will automatically filter data based on this relationship. A student type Company Report can be defined to us "Filter By Current Supervisor". These Reports will only appear in the Student Reports area in

the Student Portal for those users who are Supervisors and will display data based on the current user's data view restrictions and on the saved filters in the report to control whether All or Immediate subordinates will be displayed.

You can also filter data by all or immediate subordinates combined with a specific user. When selected, the data returned in the report is filtered based on the combination of the subordinate and supervisor filters set for the report.

On student received notifications this data will be populated from the designated Primary Supervisor. On supervisor received notifications this data will be populated from the receiving supervisor.

Exposing reports to the Student Portal

Reports can be displayed in the Student Portal. One or more reports can be defined as Student Company Reports and exposed to the Student Console as a list of available student reports (See **Defining Student Company Reports**) (see "**Defining Student Company Reports**" on page 141).

The reports that are available to link into the student console are reports that are generated when creating reports.

System Reports

Name	Description	Report Query
Checklist Details	Includes all data stored in a checklist record for any student. Filters available for this report include: Students, Mastery Date, Checklist, Status, Supervisor, and Language.	CheckListDetails
SR Administrators	List of Administrators and their Workgroup memberships.	Administrators
SR Billable Transactional Count	Summary count of number of course instances administered (used to calculate/Validate licensing as appropriate).	TransactionDetails
SR Billable Transactional Count Details	Detailed list of user course records within a reporting period.	TransactionDetails
SR Billable User Count	Summary count of active user accounts within a reporting period.	UserDetails
SR Billable User Count Details	Detailed list users First Name, Last Name, login, Student Ref (Emp ID, and Job Title for all active users in a reporting period.	UserDetails
SR Catalog Items By Group	List of Catalog Items by Student Group	CatalogItemsForGroup
SR Catalog Items By Group With Training Events	List of Catalog Items by Student Group with Training Events	CatalogItemsForGroupWithTrainingEvents
SR Certification Due Dates	Displays when training was mastered compared to when it was due.	StudentTrainingHistory_V2

Name	Description	Report Query
SR Competency	List of selected Competencies.	Competency
SR Competency Gap Analysis	Matrix report showing competency mastery for a defined set of students. Use it to predict the expected compliance timeframe for any competency that is not controlled by a qualification. The expected compliance timeframe can be estimated based on the default values for certification/recertification defined for the competency. Requires student criteria and competency filter values.	CompetencyGapAnalysis
SR Compliance Variance Summary	List of variances based on compliance to qualifications in any 'type' associated with a qualification. Variances can be the result of an open search or filtered. 'UserCompany' added as available field to this report query.	StudentTrainingPlan
SR Compliance Variance Summary by Area	As above and grouped by Organization Unit (parents)	StudentTrainingPlan
SR Course Certificate	Course Certificate by eCourse or Training Activity	StudentCompletion
SR Course Series Grading Chart	List of tasks and associated grades for students by Training Activity.	CourseGradingSheetSeries
SR Declined Training Event Invitation	To report on Training Event decline audit trail	TrainingEventUsersDeclined
SR Duplicate Training Records	List of duplicate training records by student.	DuplicateUserInterventions
SR Ecourses	Uses ECourses query list of Ecourses and information associated with each Ecourse	Ecourses
SR eCourse Activity	Displays user activity data for eCourses, including start date, end date, time in course, and exit reason. Report is grouped by eCourse.	ECourseActivity
SR Group Members	List of Groups and their Student members.	StudentGroups

Name	Description	Report Query
SR Glossary Terms	List of Glossary terms and the associated Content Objects and eCourses.	Glossary
SR Glossary Terms Details	List of Glossary terms and the Content Objects and the associated eCourses along with creation date and associated audio or graphic information.	Glossary
SR Instructor Guide	'Lesson Content' and 'Instructor Notes' by eCourse/Training Activity and children.	InstructorGuide
SR Instructor Training Event Schedule	Displays instructor schedules by training event.	TrainingEventUsers
SR Intervention Mastery Summary	List of selected interventions (eCourses and Training Activities) with total # of students attaining mastery.	StudentTrainingHistory
SR Invoice	Invoice by account name and sales item(s) (i.e. course). Includes billing data as purchaser data	InvoiceByInvoiceNumber
SR Invoice Details_1 v1.0	Invoice details for exporting.	InvoiceDetails_1
SR Jobs		Jobs
SR Media Use	Display media in use (or not in use) and where used.	MediaUse
SR Metrics That Matter® Export	Used to support the integration with KnowledgeAdvisors Metrics that Matter®: Starter Edition by reporting on daily student activity.	MetricsThatMatterExport
SR Organization Structure	Display the Organization Unit structure. External Keys field available in query (v4.2.5)	OrganizationUnits
SR Organization Anomalies	External Keys field available in query (v4.2.5)	Students
SR Privileges and Data View Restrictions.	Provides details of privileges and data view restrictions grouped by user	PrivilegesAndDvr
SR Qualification Details	Qualification Details	

Name	Description	Report Query
SR Qualifications Due By Intervention	List of Due qualifications by qualification certification type (Requirement, Competency or Intervention).	StudentTrainingPlan
SR Qualifications Due by Student	List certification by student.	StudentTrainingPlan
SR Qualifications Past Due By Intervention	List of Past Due qualifications by qualification certification type (Requirement, Competency or Intervention).	StudentTrainingPlan
SR Qualifications Past Due by Student	List past due certification by student.	StudentTrainingPlan
SR Qualifications Status By Intervention	List of qualification status by student within qualification certifications.	StudentTrainingPlan
SR Qualification Status By Intervention (Basic1)	To improve report performance for qualification reports using this new query for: List of qualification status by student within qualification certifications. (Note: Added field UserPhone to query for v4.2.5.)	StudentTrainingPlanBasic1
SR Qualifications Status by Student	List of qualification status by certification within student. Shows students qualification status (MET, NOT MET, DUE, or EXPIRED) by Interventions, Competencies, and Requirements grouped by Qualifications.	StudentTrainingPlan
SR Question Bank	List of question bank items.	Questions
SR Random Order Question Exams	Generate random order question exams in pdf – allows for printing of the exams	RandomQuestionExams
SR Recertification Report by Intervention	Recertification status for the student grouped by certification.	StudentTrainingPlan
SR Recertification Report by Student	Recertification status for the certification grouped by student. NOTE: UserCompany is an available field to the StudentTrainingPlan report query.	StudentTrainingPlan
SR Report Activity	Provides details for monitoring Report activity on your server, grouped by Report name.	ReportActivity

Name	Description	Report Query
SR Report Activity By Date	Provides details for monitoring Report activity on your server, grouped by Report generation date.	ReportActivity
SR Resource Schedule		ResourceSchedule
SR Revenue By Course	List of courses and associated revenue.	CatalogItemByCourseCombined
SR Revenue By Course Venue	List of course location and associated revenue.	CatalogItemByCourseVenueCombined
SR Revenue By Media	List of media and associated revenue.	CatalogItemByMediaCombined
SR Revenue By Package	List of 'packages' and associated revenue.	CatalogItemByPackageCombined
SR SCORM Interactions	List of user interaction data saved by imported SCORM 2004 SCOs.	ScormInteractions
SR Student Exam Failures	A printout of a student exam that matches the student choices against the correct choices for a selected exam. Instructors may use this report to review a completed exam with students.	StudentExams
SR Student Exam Results	List of student exam results by exam and attempt.	StudentExams
SR Student Exam With Answers	A student report to provide feedback to users taking Rival Learn exams. Displays exam results, as well as the correct responses for each question.	StudentExamsAnswers
SR Student Group	Listing of Students and the Groups in which they are members.	StudentGroups
SR Student History	List of students with training history for each. (Note: TEstStartDate and TEEndDate have been added for v4.2.5)	StudentTrainingHistory
SR Student History (Recent) by Intervention	List of interventions / certifications with recent student activity for each. (Note: TEstStartDate and TEEndDate have been added for v4.2.5)	StudentTrainingHistory
SR Student History – All Exams	Show Student Training History, including Exam contained within eCourses. (Note: TEstStartDate and TEEndDate	StudentTrainingHistoryAllExams

Name	Description	Report Query
	have been added for v4.2.5)	
SR Student History By Intervention	List of interventions / certifications with student activity for each. (Note: TEstStartDate and TEstEndDate have been added for v4.2.5)	StudentTrainingHistory
SR Student History By Intervention (Basic1)	To improve report performance for history reports using this new queries for: List of interventions / certifications with student activity for each	StudentTrainingHistoryBasic1
SR Student Qualifications		QualificationByUser
SR Student SCORM Activity	Displays student attempt score and completion data for all SCORM or AICC student course records.	StudentScormActivityTracking
SR Student Sign-In Roster	List of Training Activities/Events within student sign-in for each.	TrainingEventUsers
SR Student Training Combined	Combination of student training History and Student Training Plan (qualifications) reporting on both the MET and Scored status. (Note: TEstStartDate and TEstEndDate have been added for v4.2.5)	StudentTrainingAll
SR Student Training History By Group - with Default CEUs	Shows Student Training History grouped by Student Group, and include Student Group Membership data. ** Group is a required filter field. You must provide at least 1 Group to retrieve records ** (Note: TEstStartDate and TEstEndDate have been added for v4.2.5)	StudentTrainingHistoryByGroup
SR Student Training History with Default CEUs	Shows Student Training History grouped by Student. (Note: TEstStartDate and TEstEndDate have been added for v4.2.5)	StudentTrainingHistory
SR Students	List of students by name including reference, job, and organizational area. External Keys field available in query	Students

Name	Description	Report Query
	(v4.2.5)	
SR Students by Area	List of organizational areas with students attached to each area. External Keys field available in query (v4.2.5)	Students
SR Students by Job	List of jobs with students attached to each job. External Keys field available in query (v4.2.5)	Students
SR Subscription Activity	Displays list of subscription activities during a time period.	SubscriptionActivity
SR Survey Results Detail	A statistical analysis of course surveys completed by students. Analyze student reactions to completed courses. Filter by eCourse has been added.	StudentSurveys
SR Survey Results Summary	List of surveys with summary results for each. Filter by eCourse has been added.	StudentSurveys
SR Test Item Analysis	A statistical analysis of selected test items used in examinations. Determine the reliability and validity of test items within the Rival Learn question banks.	Questions
SR Test Item Analysis (2)	Includes Matching & Fill-in-the-Blank	QuestionsFlaQ
SR Token Activation Code Details	Details for Tokens by invoice.	TokenActivationCodeDetails
SR Tokens By Group	List of student groups with tokens and the tokens available to each.	TokensByGroup
SR Tokens By Student	List of students with tokens and the tokens available to each.	TokensByStudent
SR Training Activities	List of Training Activities and information associated with each activity.	TrainingActivities
SR Training Analysis	Reports on daily student activity for use in integrations.	StudentTrainingHistoryAnalysis1

Name	Description	Report Query
SR Training Event Summary	List of Training Events with summary information for each.	TrainingEventUsers
SR Training Locations	Summary report displays Venue Name, Training Location Name, Reference, Contact Information, Email, and Phone.	TrainingLocations
SR Training Summary by Area (cross tabbed)	List of organizational areas with training summary information for each.	StudentTrainingHistory
User Course Audit	Summary of User Name, Course Title, Action (Add, Update, or Delete) and a list of fields changed for updated records.	User Course Audit
User Course Audit Details	Detailed list of User Name, Course Title, Action (Add, Update, or Delete) and the detailed field values changed for all updated fields.	User Course Audit Details
SR User Profile Details	Summary of user count	UserProfileCounts
SR User Profiles	Summary of user count	UserProfileCounts
SR Weekly Roster	List of Training Activities/Events and dates within a week, with student roster for each.	TrainingEventUsers

My Reports

My Reports page

My Reports

Add

Title +	Description	Owner	
eCourse Activity		User	
GL Course Certificate		Company	
GL Exam Results		Company	
GL Qualification Status by Intervention		Company	
GL Qualification Status by Student		Company	

Students: Select Clear

student7, gen7

student8, gen8

test, acclaro

Trainer, Teresa

Total: 4

Title +

Description

Owner

My eCourse Activity Report

Company

Total: 1

The My Reports page displays reports that have been shared with administrators (who have access to this tab). From this page, administrators can:

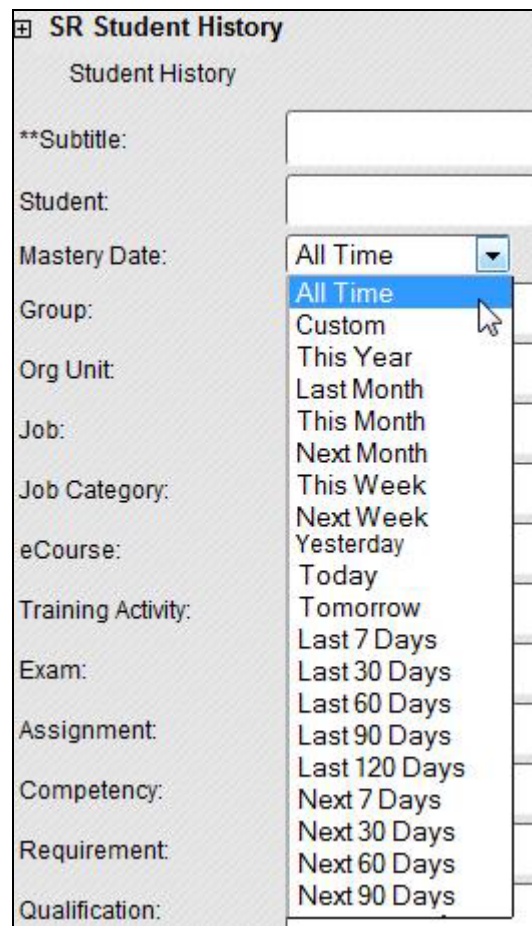
- Edit report properties
- Preview reports
- Delete user-added reports
- Add a report

Dynamic date filters in reports

You can set and save a dynamic date filter for any report that uses a date to filter data in a report.

Setting a dynamic date filter

To set a dynamic date filter, select any one of the date choices in the drop down date filter. The Mastery Date filter in the SR Student History Report is shown as an example:



By selecting a dynamic date filter and saving it, you can create dynamic reports that filter data based on a date choice relative to the current date.

List of dynamic date filters

Rival Learn has the following dynamic date filters.

Date filter	Description
All Time	No restrictions based on date.
Custom	Allows entering a specific date range from one date to another date
This Year	Current calendar year: January 1 of current year to December 31 of current year.
Last Month	Previous month: first day of last month to last day of last month
This Month	Current month: first day of current month to last day of current month
Next Month	First day of next month to last day of next month

This Week	Current Week: start of day on previous Sunday to end of day on next Saturday
Next Week	Next week: start of day on next Sunday to end of day on next Saturday+ 1 week
Yesterday	Start of day yesterday to end of day yesterday
Today	Start of day today to end of day today
Tomorrow	Start of day tomorrow to end of day tomorrow
Last X Days	Start of day today minus X days to the end of day today
Next X Days	Start of day today to the end of day today plus X days

View a report

Reports created using a Microsoft SQL Reporting template can be viewed within Rival Learn, filtered based on the exposed data fields in the reports, and generated into a number of supported formats.

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **My Reports**.

The **My Reports page** (page 151) opens.

3. In the list beside a report, click  and then click **Preview**.

The report description (if it exists) appears below the report name and appropriate filters for the report display. By default, all reports will generate in a new browser window. Set "Open Report in new Window" to OFF to display the report in a frame within the same window.

4. From the Report Format drop-down box, select the report format.

Use the default format to generate the report as an Adobe Acrobat PDF report for immediate viewing and printing. Use the other formats to transfer data or to export the report for use in other applications.

5. Click **Generate** to generate the report in the selected format.

Modify a report

Reports created using a Microsoft SQL Reporting template can be modified within Rival Learn by changing the filters set for the report.

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **My Reports**.

The **My Reports page** (page 151) opens.

3. In the list beside a report, click  and then click **Preview**.
4. From the Report Format drop-down box, select the report format.
5. From each filter criteria, click **Select** to link to the data you wish to filter by.
6. Click **Generate** to generate the report in the selected format.
7. Click **Save** to save the current filter settings to the My Reports tab.

Custom Reports

Custom Reports can be created, imported, and generated using SQL Reporting Services.

Reporting basics

- SQL Server Business Intelligence Development Studio is used to create RDL reports and can be used for customizing reports. Experience with RDL formats (xml elements, etc.) or experience using Business Intelligence Studio will be necessary to customize these reports.
- Reports connect to the database using Report Queries. The Report Queries compile data from tables in the database make a single data table which is used as the data sources for reports. Each query includes a full listing of exposed fields and their data types.
- Rival's policy with Rival Learn prevents the database from being exposed externally and thus prevents any external direct connection to the database. To account for this and understand that a data source may be required for customizing reports, we utilize XML files as local data sources for customized reporting.
- Rival tries to ensure there is a default RDL report for each Report Query, but some older infrequently used queries may not have a default report. Please contact Rival if you have any questions regarding these Report Queries.

Report Queries

Data fields available to external reports are determined based on a number of Report Queries developed that compile data from tables in the database and make this data available from within an RDL report.

Specific Report Query definitions are available on-line from the Rival Learn Administration console Help. To access the definitions, perform the following steps:

1. From the navigation bar, click **Help**.
The Help window opens.
2. Under Reference, click **Report Queries**.
A list of currently available report queries for your database is shown.
3. From the list, select a report query reference.
Report query details are shown.

Modify a system report

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **My Reports**.
The **Reports page** (page 134) opens.
3. Search for the report that you want.
4. In the list beside a report, click  and then click **Preview**.
The report details window opens.
5. From the Report Format drop-down menu, select **SQL Server Report (RDL)**.
6. Select the Open Report in new Window check box.
7. Click **Generate** and save the report on the local hard drive.

8. Open Business Intelligence Design Studio and create a new project of type Report Server Project.
9. Add the downloaded report with a Project | Add Existing Item command.
10. There are three tabs for the report:
 - Data – this tab should not be modified, it contains the Rival Learn data downloaded with the report in an xml format.
 - Layout – this tab allows you to edit and change the report.
 - Preview – this tab allows a preview of the report.
11. Once the report has been edited it can be saved and uploaded as a new custom report to Rival Learn.

Activity

The Activity tab provides the ability to view login activity for students, managers, and for course entry. Detailed tracking information for students in Rival Learn is available.

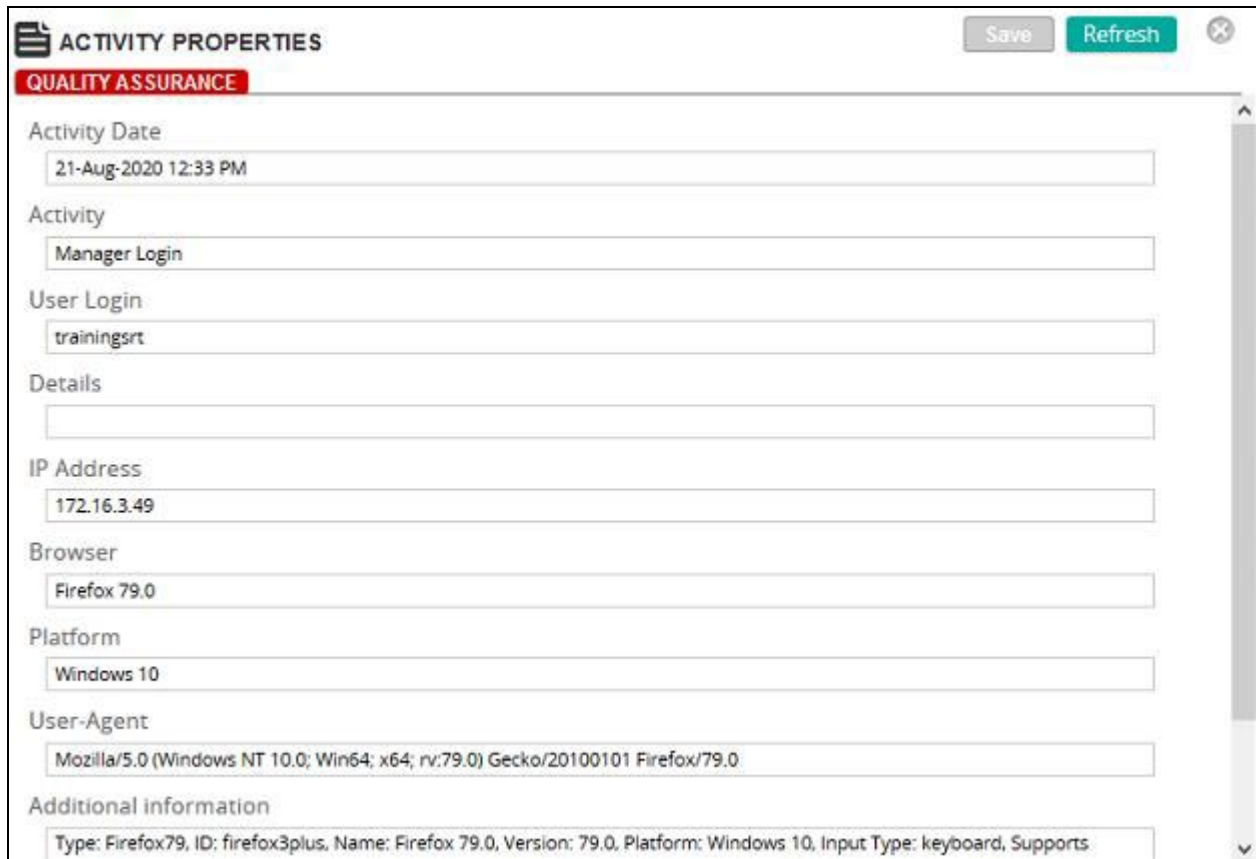
Activity page

Activity Date +	Activity	Details	User	User Login	IP Address
21-Aug-2020 12:33:51 PM	Manager Login		Trainer, Teresa T	trainingsrt	172.16.3.49
21-Aug-2020 7:25:01 AM	Manager Login		Trainer, Teresa T	trainingsrt	172.16.3.54

Total: 2

The Activity page shows login activity for students, managers, and course entry in Rival Learn. Login activity information includes activity date, activity name, activity details, user name, user login ID, and IP address.

Activity Properties page



The screenshot shows the 'ACTIVITY PROPERTIES' window with a 'QUALITY ASSURANCE' tab. It contains several input fields for activity details:

- Activity Date:** 21-Aug-2020 12:33 PM
- Activity:** Manager Login
- User Login:** trainingsrt
- Details:** (empty field)
- IP Address:** 172.16.3.49
- Browser:** Firefox 79.0
- Platform:** Windows 10
- User-Agent:** Mozilla/5.0 (Windows NT 10.0; Win64; x64; rv:79.0) Gecko/20100101 Firefox/79.0
- Additional information:** Type: Firefox79, ID: firefox3plus, Name: Firefox 79.0, Version: 79.0, Platform: Windows 10, Input Type: keyboard, Supports

At the top right of the window are 'Save' and 'Refresh' buttons, and a close button (X).

The Activity Properties page is a read-only page that shows activity details for a specific user login. Administrators typically use this page to troubleshoot browser and platform issues.

View and monitor login activity

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **Activity**.
The **Activity page** (page 155) opens.
3. Search for the login activity.
4. In the list beside login activity, click  and then click **Properties**.
The **Activity Properties page** (page 156) opens.
5. View the activity summary.
6. Click **Close**.

View a user's browser and operating system information

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **Activity**.
The **Activity page** (page 155) opens.

3. Search for the login activity that you want.
4. In the list beside login activity, click  and then click **Properties**.

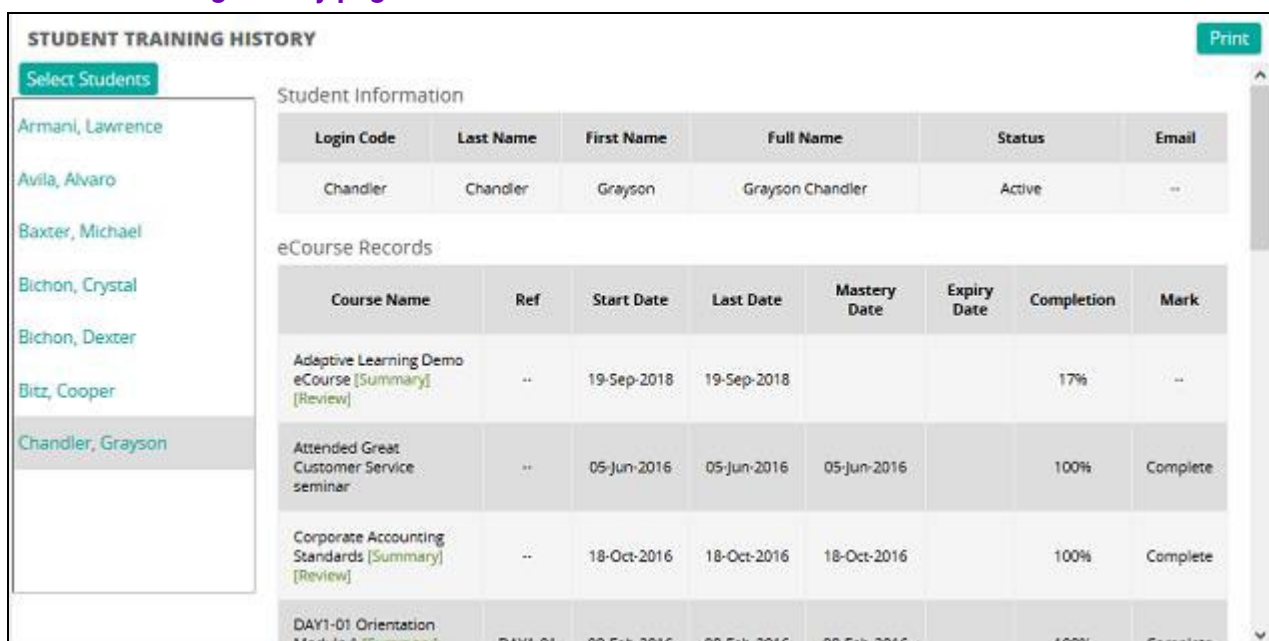
The **Activity Properties page** (page 156) opens.

5. Read the Browser, Platform, User Agent, and Additional Information sections to get information about the browser used, platform, and detailed browser options.
6. Click **Close**.

Training

The Training tab provides quick access to a student's training history with print capability.

Student Training History page



Login Code	Last Name	First Name	Full Name	Status	Email
Chandler	Chandler	Grayson	Grayson Chandler	Active	--

Course Name	Ref	Start Date	Last Date	Mastery Date	Expiry Date	Completion	Mark
Adaptive Learning Demo eCourse [Summary] [Review]	--	19-Sep-2018	19-Sep-2018			17%	--
Attended Great Customer Service seminar	--	05-Jun-2016	05-Jun-2016	05-Jun-2016		100%	Complete
Corporate Accounting Standards [Summary] [Review]	--	18-Oct-2016	18-Oct-2016	18-Oct-2016		100%	Complete
DAY1-01 Orientation Module 1 [Summary]	DAY1-01	08-Feb-2016	08-Feb-2016	08-Feb-2016		100%	Complete

The Student Training History page shows training history for the students selected in the Select Students list. The page shows student information, eCourse records, training activity records, and exam records.

You can view a **Course Activity Summary** (on page 158) and **Student Review** (on page 159) information by clicking a link in the eCourse Records grid.

You can also print student training history by clicking the Print button.

Access, view, and print a student's training history

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **Training**.
The **Student Training History page** (page 157) opens.
3. Click **Select Students**.
4. From the Students window click **Search** or filter the search by typing additional information into the filter boxes.
5. Select the check box of one or more students or click **Select All**.

6. Click **Confirm** to add the student(s) to the Select Students column.
7. From the Select Students column, click the student to view the training history.
8. Click **Print** to print the training history.

Course Activity Summary

Course Activity Summary								
Course: Adaptive Learning Demo eCourse								
User: trainingsrt, trainingsrt								
Time in Course: 00:05:22.73								
Course Structure	First Access	Last Access	Mastery Date	Attempts	Completed	Satisfied	Score	Time
Adaptive Learning Demo eCourse	18-Oct-2013	18-Oct-2013		1			0	00:05:22.73
Introduction	18-Oct-2013	18-Oct-2013	18-Oct-2013	1	✓	✓		00:00:12.19
Pre-Test	18-Oct-2013	18-Oct-2013		1	✓	✗	25	00:00:30.89
Content	18-Oct-2013	18-Oct-2013		1				00:04:39.65
Objective 1 Content	18-Oct-2013	18-Oct-2013	18-Oct-2013	1	✓	✓		00:04:39.65
Objective 2 Content								
Post-Test								
Summary								
Legend ▪ Not Required ▪ Required (Unknown) ▪ Required (Incomplete) ▪ Required (Passed) ▪ Required (Failed)								

The Course Activity Summary provides a summary of current status for each activity within the eCourse for all content objects. The summary has these columns:

- **Course Structure:** Shows the structure of the eCourse (activities within).
- **First Access:** Shows the date and time when user accessed eCourse for the first time.
- **Last Access:** Shows the date and time when the user last accessed eCourse.
- **Mastery Date:** Shows the date the user mastered the course.
- **Attempts:** Shows the number of times a user accessed the eCourse.
- **Completed:** Shows whether a particular activity within eCourse was completed.
- **Satisfied:** Shows whether a particular activity within eCourse was satisfied.
- **Score:** Shows the score for a particular activity within eCourse.
- **Time:** Shows the how much time a user spent in a particular activity within eCourse. Time is also accumulated for all activities within eCourse and rolls up to the top level in this column. (Note: Cluster activities completed prior to version 2013.4 do not display an accumulated time.)

View a Course Activity Summary for a student

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **Training**.

The **Student Training History page** (page 157) opens.

3. Click **Select Students**.
4. From the Students window, click **Search** or filter the search by typing additional information into the filter boxes.
5. Select the check box of one or more students or click **Select All**.
6. Click **Confirm** to add the student(s) to the **Select Students** column.
7. From the Select Students column, click the student to view the training history.
8. Under eCourse Records in the Course Name column, click **Summary**.

The **Course Activity Summary page** (see "**Course Activity Summary**" on page 158) opens.

Student Review

The Review link provides the ability to review the current student status from the student's perspective. Launching the eCourse using the review link allows administrators to view the current status as if they launched the eCourse as the student user. No data is modified from the review link.

The Review link provides the ability to audit the SCORM or AICC data communication for any imported SCOs and displays the current status for all activities in the eCourse activity tree.

Access Student Review for a student

1. From the navigation bar, click **Learning**.
2. Under Monitor, click **Training**.

The **Student Training History page** (page 157) opens.

3. Click **Select Students**.
4. From the Students window, click **Search** or filter the search by typing additional information into the filter boxes.
5. Select the check box of one or more students or click **Select All**.
6. Click **Confirm** to add the student(s) to the **Select Students** column.
7. From the Select Students column, click the student to view the training history.
8. Under eCourse Records in the Course Name column, click **Review**.

The review window opens.

Direct Qualifications

A qualification is a way to assign training to students. The training included in a qualification can be interventions (eCourses, training activities, assignments, exams), competencies (equivalences), and requirements (certifications/requirements handled outside of Rival Learn).

Tip: In Rival Learn, a qualification is also known as a Learning Journey.

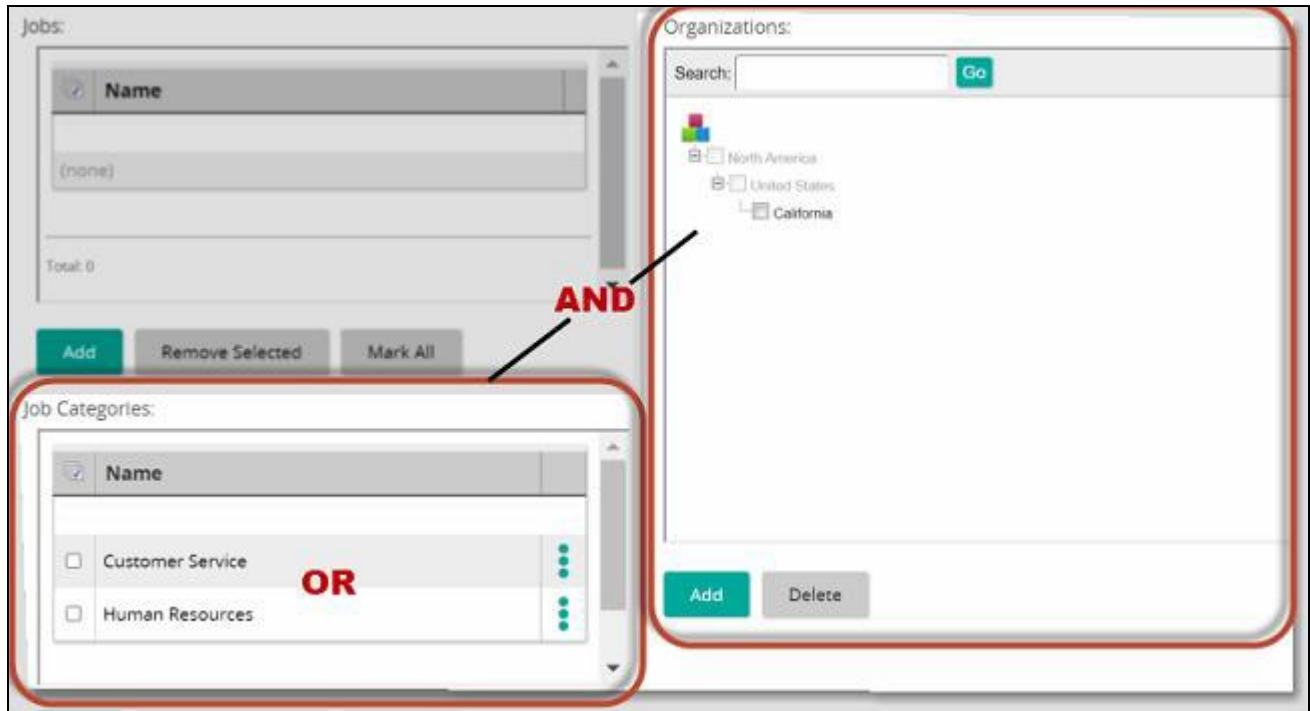
Qualifications are often limited by membership date and inclusion/exclusion criteria. Certification and recertification rules can also apply.

Membership inclusion and exclusion criteria

Qualifications can be limited by membership inclusion/exclusion criteria. Why use membership criteria? It helps assign a qualification to a specific audience (students) with minimal effort.

Membership inclusion

Qualifications can be assigned to students based on their membership in a job, group, job category, and organizational unit. The qualification can be assigned based on one or more of those criteria. When using multiple criteria, it is important to understand how the system logic works. Within the same criteria, inclusion is based on OR logic. Across different criteria, inclusion is based on AND logic. The following image illustrates this.



The screenshot illustrates the membership inclusion logic in the Rival Learn interface. It shows three panels: 'Jobs', 'Organizations', and 'Job Categories'.

- Jobs:** A panel with a search bar labeled 'Name' and a dropdown menu showing '(none)'. Below the search bar is a 'Total: 0' indicator. At the bottom are buttons for 'Add', 'Remove Selected', and 'Mark All'.
- Organizations:** A panel with a search bar and a 'Go' button. Below the search bar is a tree view showing a hierarchy: 'North America' (expanded), 'United States' (expanded), and 'California' (expanded). At the bottom are buttons for 'Add' and 'Delete'.
- Job Categories:** A panel with a search bar labeled 'Name' and a dropdown menu showing '(none)'. Below the search bar is a list of job categories: 'Customer Service' and 'Human Resources'. Each category has a checkbox and a three-dot menu icon. A red 'OR' label is placed between the two categories.

A red 'AND' label is placed between the 'Jobs' and 'Organizations' panels, indicating that the logic across different criteria is based on AND logic.

Example: Let's say you want to assign a safety course to electrical or mechanical engineers—and only those who are employed in California. In the system, membership inclusion criteria would look like this:

Jobs:

☒ Name	
☐ Engineer - Electrical	
☐ Engineer - Mechanical	

Organizations:

Search:

No results found

- Corporate
 - North America
 - United States
 - ☒ California

Job Categories:

☒ Name
(none)

Total: 0

Membership exclusion

Employees can be excluded from receiving a qualification based on their membership in a job, group, job category, and organizational unit. When using multiple criteria, the system logic works like it does with membership inclusion. Within the same criteria, exclusion is based on OR logic. Across different criteria, exclusion is based on AND logic.

Example: Let's say you want to assign a qualification to all Training Directors and Training Managers in your company except those Training Managers in Human Resources. In the system, you would use a combination of membership inclusion and membership exclusion. It would look like this:

Membership Inclusion

Membership Cut Off Date

Jobs:

☒	Name	
☐	Training Director	
☐	Training Manager	

Organizations:

Search:

Membership Exclusion

Jobs:

☒	Name	
☐	Training Manager	

Total: 1

Job Categories:

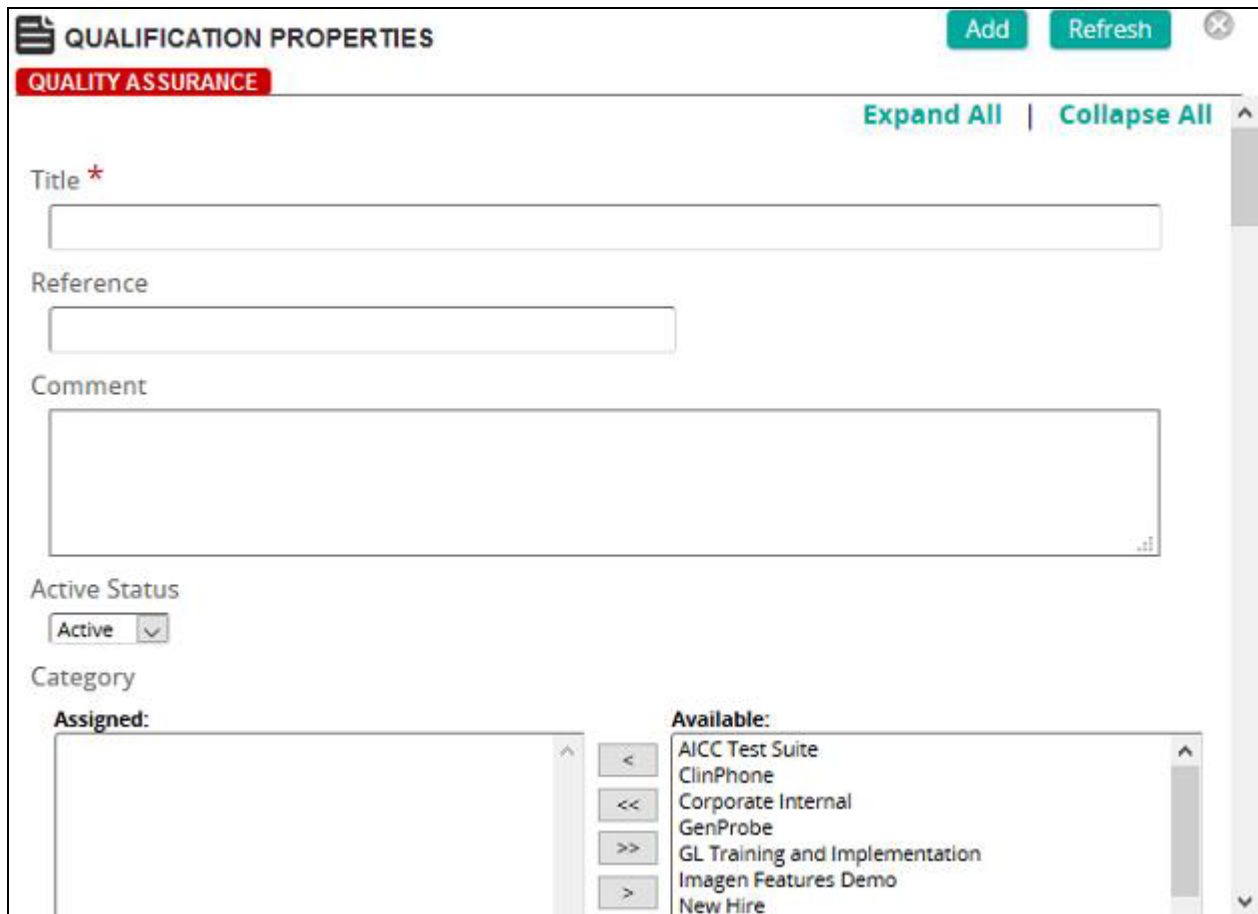
☒	Name
-------------------------------------	------

Organizations:

Search:

- Corporate
 - Finance (Fin)
 - ☒ Human Resources (HR)
 - Maintenance (Mtn)
 - Manufacturing (Mfg)
- North America

Qualification Properties page



On this page, an administrator defines the properties for a qualification.

Fields

Title: Type the title of the qualification.

Reference: Type a reference for this item to make it easier to find in searches.

Comment: Type a comment. The comment appears in the Learning Journey for students to describe the qualification.

Active Status: Select **Active** or **Inactive**.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Categories are used to group similar qualifications and display them as a collapsible group in the Learning Journey.

Certification: Certification and Recertification periods are used to define the time frame that students must certify or renew a certification for a specific training intervention, requirement, or competency. Notifications appear on the Student Home page as a "Recertification Due:" notification, or as a personal notification sent directly to the student based on a defined recertification notification.

Certification and Recertification time periods can be applied to the contents of a qualification for a specific intervention, requirement, or competency.

Membership Inclusion

Membership Cutoff Date: Use the Membership Cutoff Date to push training to students for a specified period of time. It is the absolute final date that Rival Learn considers as a membership date, and any users who become members of the qualification after this date are ignored.

For example, let's say you want to push specific training for the fiscal year, which runs from January 1, 2013 to December 31, 2013. Students have to take the training before the cutoff date of December 31, 2013. You would select December 31, 2013 from the calendar pop-up. Any student that enrolls in the qualification after December 31, 2013, will not be considered members of the qualification and Rival Learn will not calculate any certification status for any certifications within the qualification.

Jobs, Job Categories, Groups, Organizations: Qualifications can be applied to students based on their membership in a job, group, job category, or organizational unit. When using multiple inclusion criteria, the inclusion logic uses OR logic to determine inclusion *within* the same criteria and AND logic to determine inclusion *across* different criteria.

Membership Exclusion

Jobs, Job Categories, Groups, Organizations: Students can be excluded from a qualification based on their membership in a job, group, job category, or organization unit. When using multiple exclusion criteria, the exclusion logic uses OR logic to determine exclusion *within* the same criteria and AND logic to determine exclusion *across* different criteria.

Individual Inclusion and Individual Exclusion: These fields provide a way to personalize the development plan for an individual student.

Tip: Use individual inclusion/exclusion methods **ONLY** when an individual requires the qualification based on reasons other than their membership in a job, job category, group, or organizational unit.

Create a qualification

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Qualifications**.
The Qualifications page opens.
3. Click **Add**.
The **Qualifications Properties page** (page 163) opens.
4. Name the qualification.
5. (Optional) Type a reference and add a comment.
6. Select a status.
7. (Optional) Select a category or categories. (Makes it easier to search for in the system.)
8. In the Certifications panel, add the training for the qualification. It can be any combination of the following:
 - **Add a competency** (page 165)
 - **Add a requirement** (page 165)
 - **Add an intervention** (page 166)
9. **Apply the qualification based on inclusion membership** (page 167).

10. (If applicable) **Exclude the qualification based on membership** (page 167).
11. (If applicable) **Apply the qualification to an individual** (page 168).
12. (If applicable) **Exclude an individual from the qualification** (page 168).
13. Click **Add**.

Add a competency to a qualification

1. Under Competencies, click **Add**.
2. On the Qualification Competency Properties page, search, select, and confirm the competency you want to add.
3. In the Comment dialog box, type a comment.
4. From the Certification Type drop-down box, select the certification type. The Certification Type provides a way to apply a certification template to a course. When the course is added to any qualification, the certification rules are applied automatically. If the rule changes in the future, editing the Certification rules in the Certification definition will apply the changes to all courses in all qualifications where they are used.
5. From the Effective Date drop-down boxes, select a day, month, and year, or click **Select Date**. Setting an effective date into the future along with an Activation date equal to the Certification time period, Rival Learn automatically pushes the training to all users at the future date.
6. From the Certification Period text box, type a number, and then select the qualifier from the drop-down box. Certification period is the time within which a user must complete training the first time they complete the training. No time limits would only be true if the Certification period were set to null.
7. From the Activation Period text box, type a number, then select the qualifier from the drop-down box. Activation period controls when the certification will become active and be pushed to the user.
8. From the Final Due Date drop-down boxes, select a day, month, and year or click **Select Date**. The final due date is the absolute due date the user will have to complete the certification.
9. In the Recertification Method drop-down box, select one of the following:
 - **None**
 - **Mastery Date:** For the Recertification Period and/or Reactivation Period text boxes, type the number for Years, Months, or Days. Recertification Due Dates are calculated based on the Mastery Date for a certification record
 - **Fixed Period:** For the Base Due Date select a date. For the Recertification Period and/or Reactivation Period text boxes, type the number for Years, Months, or Days. Recertification Due Dates are calculated based on the Mastery Date for a certification record and its relationship to a fixed Base Due Date, Recertification Period and the Reactivation Period defined for the Certification
10. Select the **Enable Recertification Notifications** check box to allow for notifications of recertification.
11. Click **Add**.

Add a requirement to a qualification

1. Under Requirements, click **Add**.
2. On the Qualification Requirements Properties page, search, select, and confirm the requirement you want to add.

3. In the Comment dialog box, type a comment.
4. From the Certification Type drop-down box, select the certification type. The Certification Type provides a way to apply a certification template to a course. When the course is added to any qualification, the certification rules are applied automatically. If the rule changes in the future, editing the Certification rules in the Certification definition will apply the changes to all courses in all qualifications where they are used.
5. From the Effective Date drop-down boxes, select a day, month, and year, or click **Select Date**. Setting an effective date into the future along with an Activation date equal to the Certification time period, Rival Learn automatically pushes the training to all users at the future date.
6. From the Certification Period text box, type a number, and then select the qualifier from the drop-down box. Certification period is the time within which a user must complete training the first time they complete the training. No time limits would only be true if the Certification period were set to null.
7. From the Activation Period text box, type a number, then select the qualifier from the drop-down box. Activation period controls when the certification will become active and be pushed to the user.
8. From the Final Due Date drop-down boxes, select a day, month, and year or click **Select Date**. The final due date is the absolute due date the user will have to complete the certification.
9. In the Recertification Method drop-down box, select one of the following:
 - **None**
 - **Mastery Date:** For the Recertification Period and/or Reactivation Period text boxes, type the number for Years, Months, or Days. Recertification Due Dates are calculated based on the Mastery Date for a certification record
 - **Fixed Period:** For the Base Due Date select a date. For the Recertification Period and/or Reactivation Period text boxes, type the number for Years, Months, or Days. Recertification Due Dates are calculated based on the Mastery Date for a certification record and its relationship to a fixed Base Due Date, Recertification Period and the Reactivation Period defined for the Certification
10. Select the **Enable Recertification Notifications** check box to allow for notifications of recertification.
11. Click **Add**.

Add an intervention to a qualification

1. Under Interventions, click **Add**.
2. On the Qualification Intervention Properties page, search, select, and confirm the requirement you want to add.
3. In the Comment dialog box, type a comment.
4. From the Certification Type drop-down box, select the certification type. The Certification Type provides a way to apply a certification template to a course. When the course is added to any qualification, the certification rules are applied automatically. If the rule changes in the future, editing the Certification rules in the Certification definition will apply the changes to all courses in all qualifications where they are used.
5. From the Effective Date drop-down boxes, select a day, month, and year, or click **Select Date**. Setting an effective date into the future along with an Activation date equal to the Certification time period, Rival Learn automatically pushes the training to all users at the future date.

6. From the Certification Period text box, type a number, and then select the qualifier from the drop-down box. Certification period is the time within which a user must complete training the first time they complete the training. No time limits would only be true if the Certification period were set to null.
7. From the Activation Period text box, type a number, then select the qualifier from the drop-down box. Activation period controls when the certification will become active and be pushed to the user.
8. From the Final Due Date drop-down boxes, select a day, month, and year or click **Select Date**. The final due date is the absolute due date the user will have to complete the certification.
9. In the Recertification Method drop-down box, select one of the following:
 - **None**
 - **Mastery Date:** For the Recertification Period and/or Reactivation Period text boxes, type the number for Years, Months, or Days. Recertification Due Dates are calculated based on the Mastery Date for a certification record
 - **Fixed Period:** For the Base Due Date select a date. For the Recertification Period and/or Reactivation Period text boxes, type the number for Years, Months, or Days. Recertification Due Dates are calculated based on the Mastery Date for a certification record and its relationship to a fixed Base Due Date, Recertification Period and the Reactivation Period defined for the Certification
10. Select the **Enable Recertification Notifications** check box to allow for notifications of recertification.
11. Click **Add**.

Apply the qualification based on inclusion membership

- You can use inclusion membership criteria to determine who is assigned the qualification.
 - Inclusion criteria are jobs, job category, student group, and organization unit.
 - When using multiple inclusion criteria, the inclusion logic works like this: Within the *same* criteria, inclusion is based on OR logic. Across *different* criteria, inclusion is based on AND logic.
1. In the Membership Inclusion section, determine if membership is based on a specific time frame. If it is, in the Membership Cut Off box, select a date from the calendar pop-up. Otherwise, skip this box.
 2. To base membership on:
 - Jobs, in the Jobs section, click **Add** and add a job or jobs.
 - Job category, in the Job Categories section, click **Add** and add a job category or categories.
 - Groups, in the Groups section, click **Add** and add a group or groups.
 - Organizational units, in the Organizations section, click **Add** and add an organizational unit or units.
 3. Click **Save**.

Exclude the qualification based on membership

- You can use exclusion membership criteria to exclude students from a qualification.
 - Exclusion criteria are jobs, job category, student group, and organization unit.
 - When using multiple exclusion criteria, the exclusion logic works like this: Within the *same* criteria, exclusion is based on OR logic. Across *different* criteria, exclusion is based on AND logic.
1. In the Membership Exclusion section, to exclude the qualification based on membership by:

- Jobs, in the Jobs section, click **Add** and add a job or jobs.
- Job categories, in the Job Categories section, click **Add** and add a job category or categories.
- Groups, in the Groups section, click **Add** and add a group or groups.
- Organizational units, in the Organizations section, click **Add** and add an organizational unit or units.

2. Click **Save**.

Apply a qualification to an individual

1. In the Individual Inclusion for Students section, click **Add**.
2. Search for, select, and confirm the student you want to apply the qualification to.

Exclude an individual from a qualification

- This option is useful when you have an individual or individuals that you want to exclude from a qualification that uses membership inclusion criteria. For example, let's say you set up this qualification to push training to all users who have customer service jobs. However, you do not want to include Kamala Vincent because she is retiring. You would individually exclude Kamala from the qualification.
1. In the Individual Exclusion for Students section, click **Add**.
 2. Search for, select, and confirm the student you want to exclude from the qualification.

Copy a qualification

Note: Any qualification created using the copy function is set to inactive until it is set to active. Inactive qualifications privileges data view restrictions are ignored by Rival Learn for all user memberships.

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Qualifications**.
The Qualifications page opens.
3. Search for a qualification.
4. In the list beside a qualification, click  and then click **Copy**.
5. On the message dialog box, click **OK**.

A copy of the qualification appears in the list.

Requirements

Requirements identify non-training requirements that form part of a qualification. Requirements can be assessed for individual students by marking the requirement as being completed. Such things as medical requirements, currency requirements, or other non-training requirements can be defined here, and then associated to a specific qualification as a mandated requirement. Certification and recertification periods can also be set for any requirement associated to a qualification.

Requirements page

Search

Clear

Title

Reference

Certification Type

Status

Category

Requirements

Search

Add

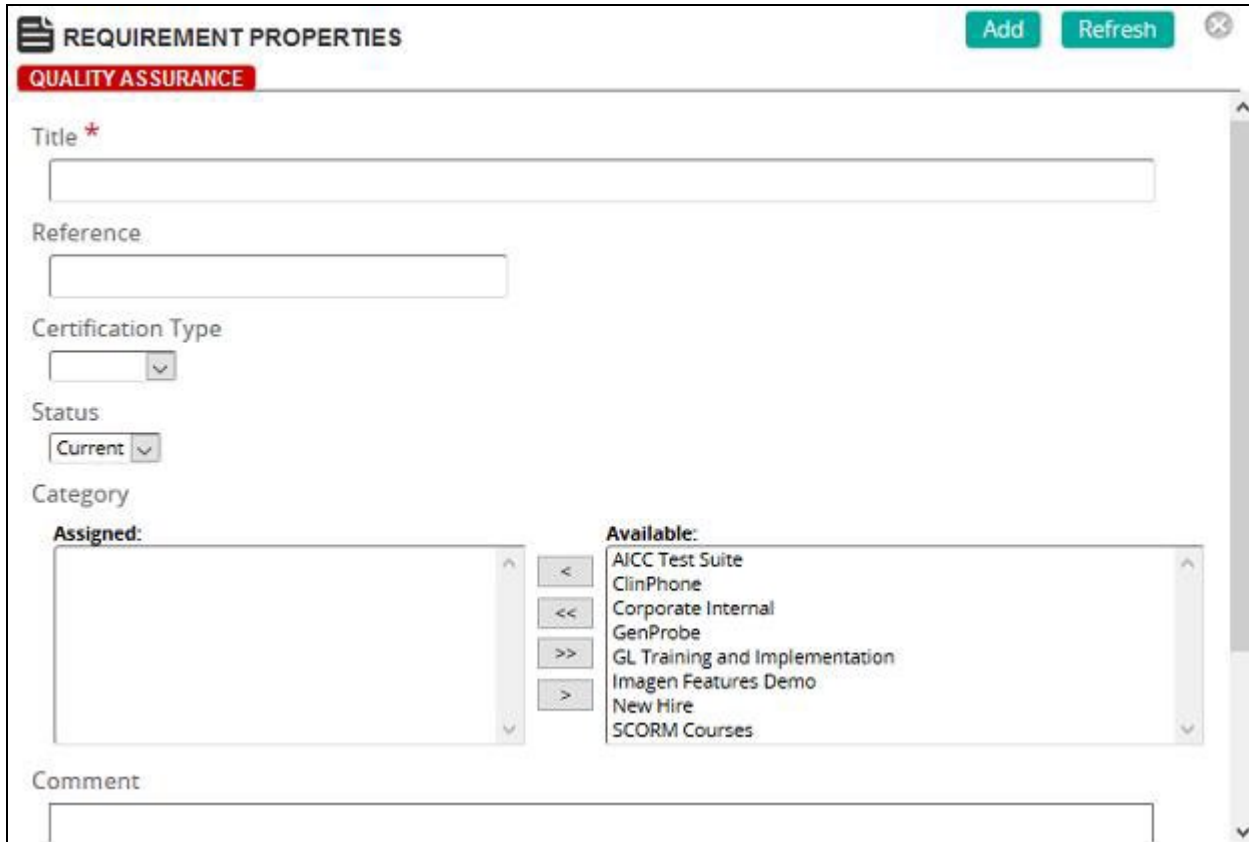
Title	Reference	Status	
Annual Eye Examination	RQ 100	Current	⋮
State Insurance License	SL	Current	⋮

Total: 2

The Requirements page lists the requirements that have been set up in Rival Learn. On this page, an administrator can:

- View requirements
- Search for requirements
- Add a requirement
- Delete a requirement
- View properties for a requirement

Requirement Properties page



On this page, an administrator defines the properties for a requirement.

Fields

Title: Type a title for the requirement.

Reference: Type a reference for this item to make it easier to find in searches.

Certification Type: Select a default certification type to define the certification and recertification time periods to meet a qualification condition.

Status: Select **Current** or **Legacy**.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Comment: Type a comment for this requirement.

Add a requirement

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Requirements**.

The **Requirements page** (page 169) opens.

3. Click **Add**.

The **Requirement Properties page** (page 170) opens.

4. Type a title for the requirement.
5. (If applicable) Type a reference for the requirement to make it easier to find in searches.
6. Select a certification type and status.
7. (If applicable) Type a comment.
8. Click **Add**.

Competencies

In Rival Learn, competencies identify the knowledge and performance expected within a job role in the organization. Competencies can be assessed for individual students by marking the competency as being mastered. This enables the prescription of learning activities as employees advance or change positions within the organization, as Rival Learn tracks individual student's competency based on the competency definitions in the system.

Competencies also can be associated to a defined qualification to create a prescription based on competency requirements. Competencies are defined by a group of performance objectives.

Competencies page



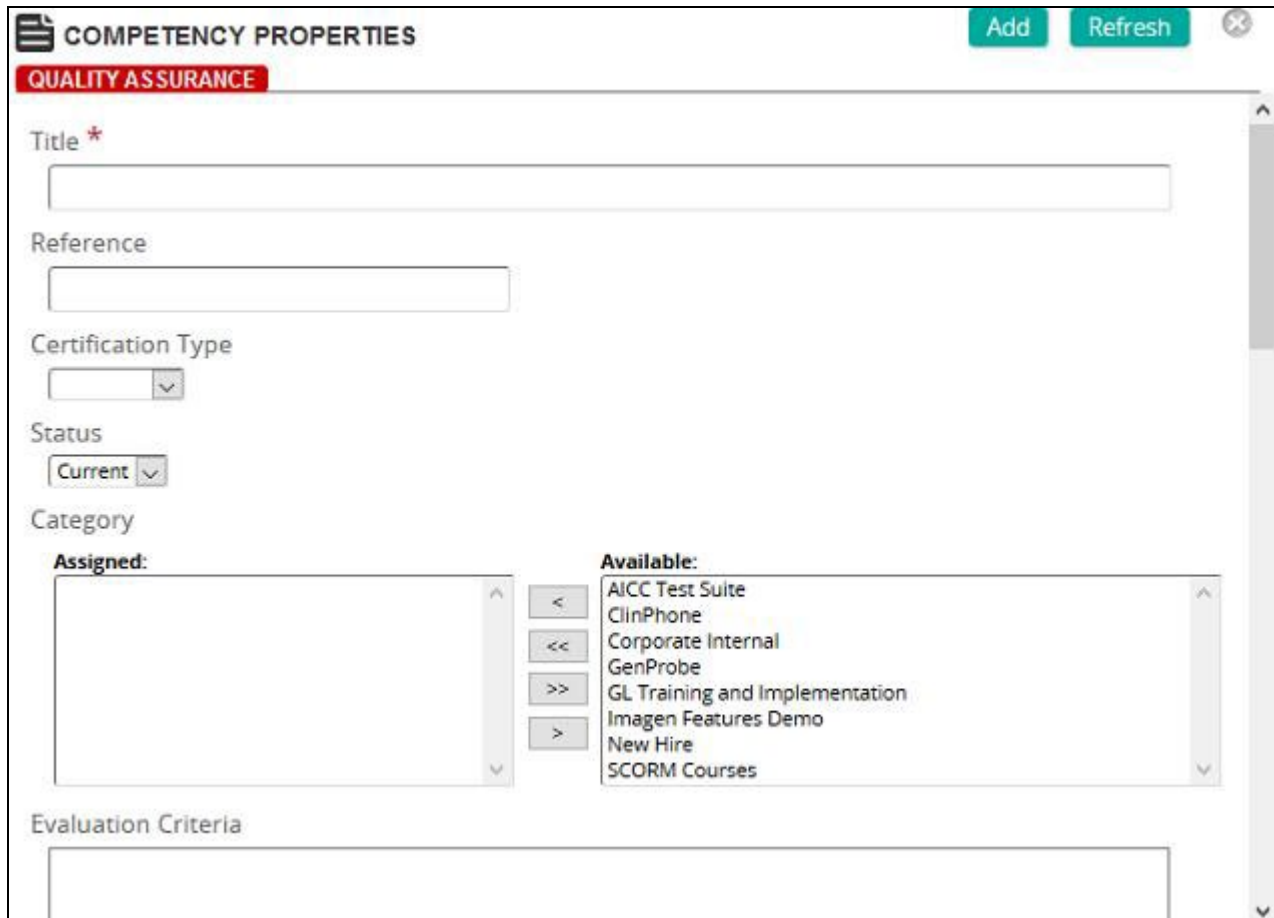
The screenshot shows the 'Competencies' page. On the left is a sidebar with search and filter options: 'Search' and 'Clear' buttons, and input fields for 'Title', 'Reference', 'Certification Type', 'Status' (set to 'Current'), and 'Category'. The main area displays a table of competencies with columns for 'Title', 'Reference', 'Status', and a vertical ellipsis menu for each row. The table lists eight competencies, all with a 'Current' status.

Title	Reference	Status
Aerodynamics	COMP 3004-Aero	Current
Aircraft Operating Instructions	COMP 3001-AOI	Current
Avionics Maintenance	COMP 4000	Current
Eclipse 500 Systems Operation Competency	Eclipse Unit 2 - Self-paced Study	Current
Flight Procedures	COMP 3003-Flt Pro	Current
Flight Safety	COMP 3006-FS	Current
GenProbe OJT	OJT Rev A	Current
Introduction		Current

The Competencies page lists the competencies that have been set up in Rival Learn. On this page, an administrator can:

- View competencies
- Search for competencies
- Add a competency
- Delete a competency
- View properties for a competency

Competency Properties page



On this page, an administrator defines the properties for a competency.

Fields

Title: Type the title of the competency.

Reference: Type a reference for this item to make it easier to find in searches.

- **Certification Type:** Select a default certification type to define the certification and recertification time periods to meet a qualification condition.

Status: Select **Current** or **Legacy**.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Evaluation Criteria: Type the evaluation criteria for the competency. Evaluation criteria describe how the competency will be evaluated.

Measurement Criteria: Type the measurement criteria for the competency. Measurement criteria describe what the student must do to determine whether the competency has been met.

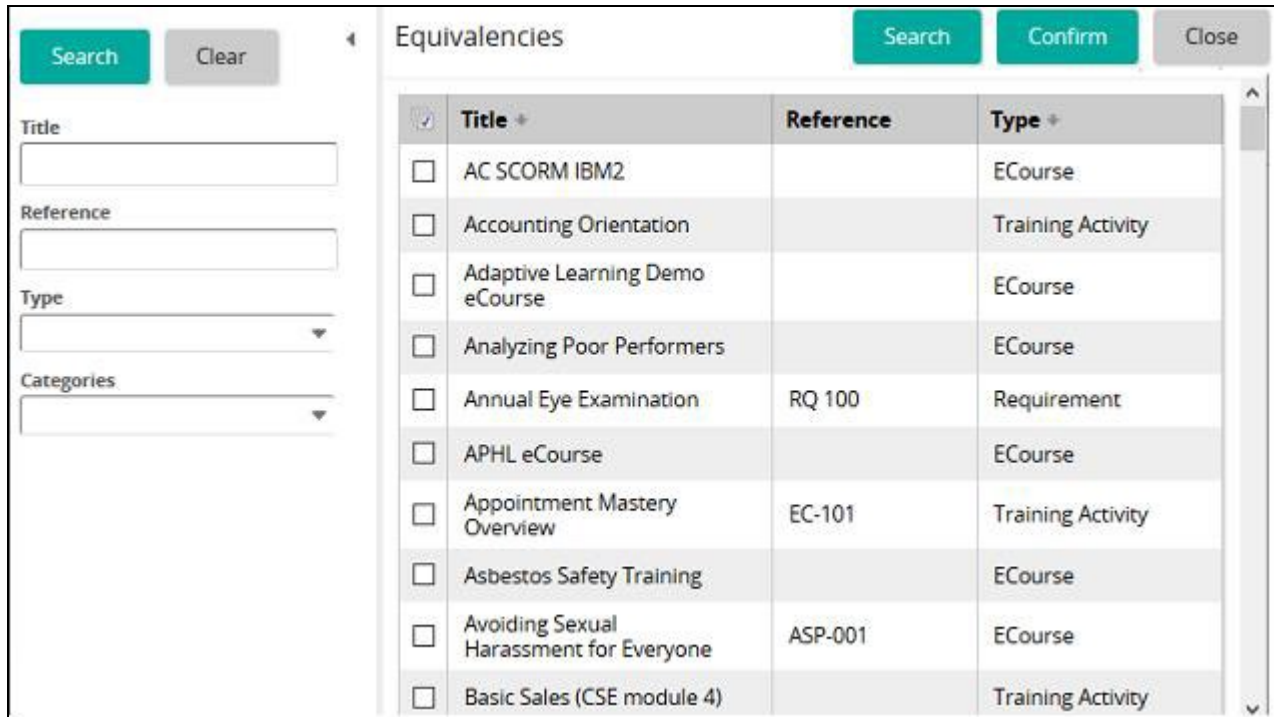
Description: Type a description of the competency.

URL: Type a URL for the competency to link the competency to a document if required. Enter the URL in the form **<http://URLlocation>** (see <http://urllocation> - **<http://urllocation>**). This URL can be exposed to students from their Personal Development Plan to allow links to documents.

Performance Objectives: Click **Add** to search for and select any performance objectives to associate with the competency. Click **Remove Selected** to remove the selected performance objectives from the selection list. Click **Mark All** to mark all the selected performance objects, which can then be removed using **Remove Selected**.

Equivalencies: Click **Add** to search for an select any equivalencies to associate with the competency. Click **Remove Selected** to remove the selected equivalencies from the selection list. Click **Mark All** to mark all the selected equivalencies, which can then be removed using **Remove Selected**.

Competency Equivalency page



	Title +	Reference	Type +
☐	AC SCORM IBM2		ECourse
☐	Accounting Orientation		Training Activity
☐	Adaptive Learning Demo eCourse		ECourse
☐	Analyzing Poor Performers		ECourse
☐	Annual Eye Examination	RQ 100	Requirement
☐	APHL eCourse		ECourse
☐	Appointment Mastery Overview	EC-101	Training Activity
☐	Asbestos Safety Training		ECourse
☐	Avoiding Sexual Harassment for Everyone	ASP-001	ECourse
☐	Basic Sales (CSE module 4)		Training Activity

The Competency Equivalency page shows assignments, eCourses, requirements, training activities, and exams eligible to become equivalencies.

Create a competency definition

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Competencies**.

The **Competencies page** (page 171) opens.

3. Click **Add**.

The **Competency Properties page** (page 172) opens.

4. Type a title for the competency.
5. (If applicable) Type a reference for the competency to make it easier to find in searches.
6. Select a certification type and status.
7. (If applicable) Select one or more categories.
8. Type evaluation and measurement criteria as well as a description of the competency.

9. (If applicable) Type a URL for the competency to link the competency to a document if required.
10. Select and assign performance objectives.
11. Select and assign any equivalencies.
12. Click **Add**.

Equivalencies

Equivalencies are eCourses, training activities, assignments, and requirements that are equal to each other. When a student masters one of the equivalents, the associated competency is considered mastered as well.

Typical scenarios where equivalencies are useful:

- A training activity version of a course is the same as an eCourse version
- A newer version of a course equals an older version of the course
- A course in one language equals the course in another language
- Any other equivalent combination of eCourses, training activities, assignments, or requirements

Equivalencies are set up and pushed to students via competencies and qualifications.

Creating equivalencies

To create equivalencies, a Rival Learn administrator:

- Adds equivalencies to a competency
- Adds the competency to a qualification so that it pushes to student training

Equivalencies and competencies

Equivalencies are defined on the Competency Properties page in the Equivalencies list.

COMPETENCY PROPERTIES

Add Refresh

QUALITY ASSURANCE

Add

Remove Selected

Mark All

Equivalencies

☒	Title	Reference	Type	
☐	Corporate Accounting Standards		ECourse	
☐	Accounting Orientation		Training Activity	

Add

Remove Selected

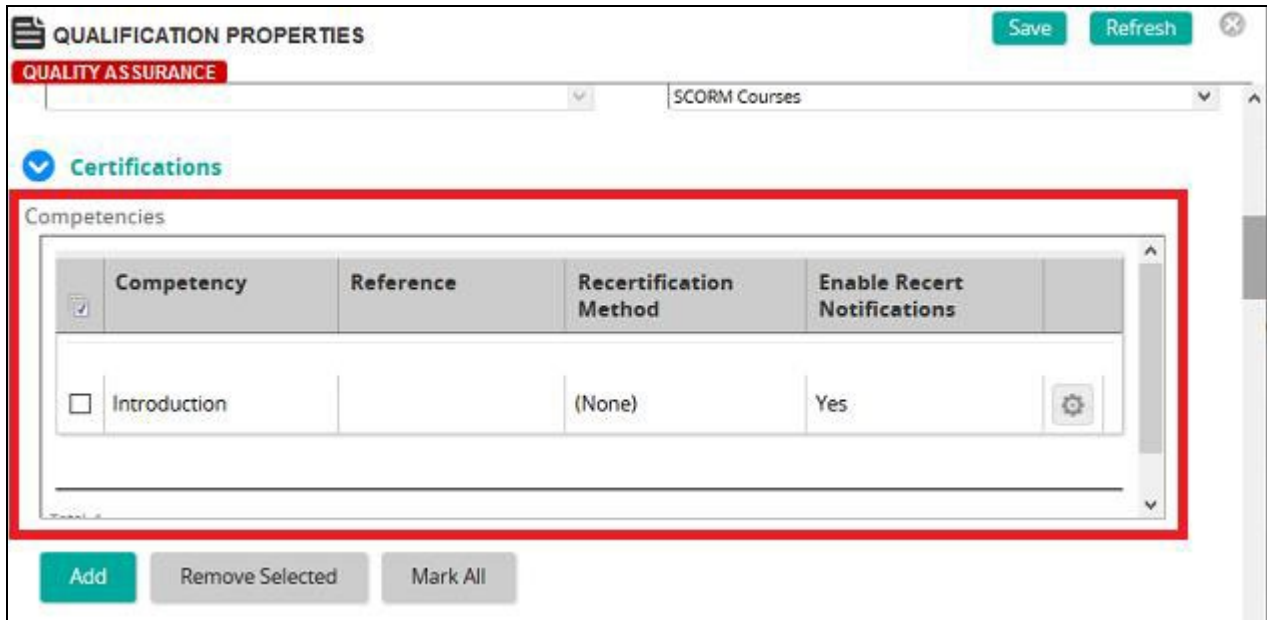
Mark All

☐ Allow User Registration by Supervisors

An administrator can add any combination of assignments, training activities, eCourses, and requirements. Each item in the list is equal, and any one item can be selected by a student to satisfy the particular competency.

Competencies and qualifications

Equivalencies get pushed to a student training via competencies associated with qualifications. An administrator selects a competency (that contains equivalencies) on the Qualification Properties page.



QUALIFICATION PROPERTIES Save Refresh

QUALITY ASSURANCE

SCORM Courses

✓ Certifications

Competencies

☒	Competency	Reference	Recertification Method	Enable Recert Notifications
☐	Introduction		(None)	Yes

Add Remove Selected Mark All

Add equivalencies to a competency

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Competencies**.

The **Competencies page** (page 171) opens.

3. Do one of the following:
 - Create a new competency
 - Search for and select an existing competency
4. On the **Competency Properties page** (page 172), navigate to the Equivalencies list.
5. In the Equivalencies list, click **Add**.

The **Competency Equivalency page** (page 173) opens.

6. Select items to become part of the equivalency and click **Confirm**.

The items appear in the Equivalencies list.

7. Click **Save**.

Add a competency to a qualification

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Qualifications**.

The Qualifications page opens.

3. Do one of the following:
 - Create a new qualification

- Search for and select an existing qualification
- 4. On the **Qualification Properties page** (page 163), navigate to the Competencies list.
- 5. In the Competencies list, click **Add**.

The Qualification Competency Properties page opens.

- 6. In the Competency box, click  to search for and select a competency.
- 7. Click **Add**.
- 8. On the Qualification Properties page, click **Save**.

Learning options in the Student Portal

Equivalencies (learning options) appear in the Rival Learn Student Portal in these places: Learning Journeys and My Training.

Learning Journeys

Learning options (equivalencies) appear in Learning Journeys as a competency type for a qualification. Click a link to see details.

My Training

Learning options are found under competencies. You can easily identify a competency by this icon: . Access a competency and the learning options are shown on the Details page. It looks similar to this:

Training Details



Microsoft Office Specialization

Microsoft Office Specialization

This competency ensures a student is competent in Microsoft Office applications.

Learning Options

Complete any one of the following learning options to satisfy this Competency.



Adaptive Learning Demo eCourse

Demonstrate Adaptive Learning Example

 Launch

Start Date	Next Due
--	--
Status	Last Accessed
Not Started	--



Analyzing Poor Performers

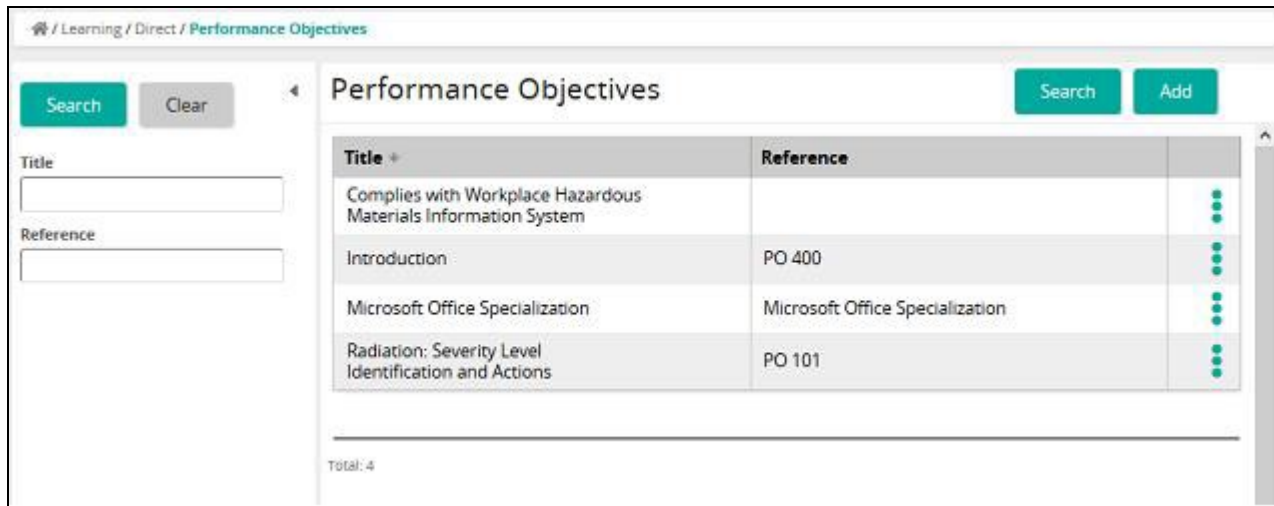
 Launch

Start Date	Next Due
--	--
Status	Last Accessed
Not Started	--

Performance objectives

Performance objectives identify the knowledge and performance expected for a task within a job role. Each performance objective consists of one or more enabling objectives that define specific objectives within a job task.

Performance Objectives page



The screenshot shows the 'Performance Objectives' page in Rival Learn. The page has a breadcrumb trail: 'Learning / Direct / Performance Objectives'. On the left, there are search filters for 'Title' and 'Reference'. The main area displays a table of performance objectives. The table has two columns: 'Title' and 'Reference'. There are four rows of data. Each row has a vertical ellipsis icon on the right side, indicating that more actions are available for each objective. At the bottom of the table, it says 'Total: 4'.

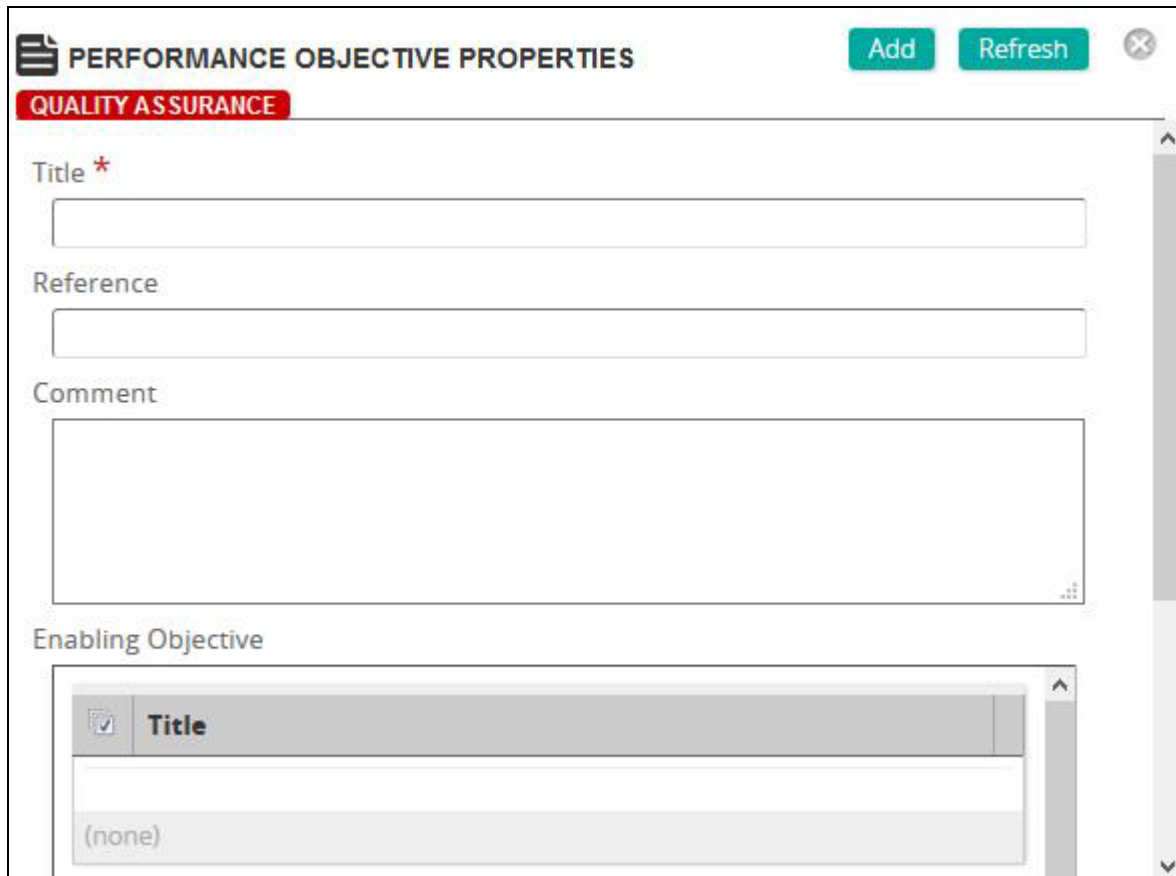
Title	Reference
Complies with Workplace Hazardous Materials Information System	
Introduction	PO 400
Microsoft Office Specialization	Microsoft Office Specialization
Radiation: Severity Level Identification and Actions	PO 101

Total: 4

The Performance Objectives page lists the performance objectives that have been set up in Rival Learn. On this page, an administrator can:

- View performance objectives
- Search for performance objectives
- Add a performance objective
- Delete a performance objective
- View properties for a performance objective

Performance Objective Properties page



PERFORMANCE OBJECTIVE PROPERTIES Add Refresh

QUALITY ASSURANCE

Title *

Reference

Comment

Enabling Objective

Title

(none)

On this page, an administrator defines the properties for a performance objective.

Fields

Title: Type a title for the requirement.

Reference: Type a reference for this item to make it easier to find in searches.

Comment: Type a comment for the performance objective.

Enabling Objectives: To add enabling objectives to the performance objective, click **Add**. On the Enabling Objectives page, search for and select an enabling objective or objectives.

Links: Click **View Links** to see any associated links to competencies.

Add a performance objective

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Performance Objectives**.

The **Performance Objectives page** (page 179) opens.

3. Click **Add**.

The **Performance Objective Properties page** (page 180) opens.

4. Type a title for the performance objective.

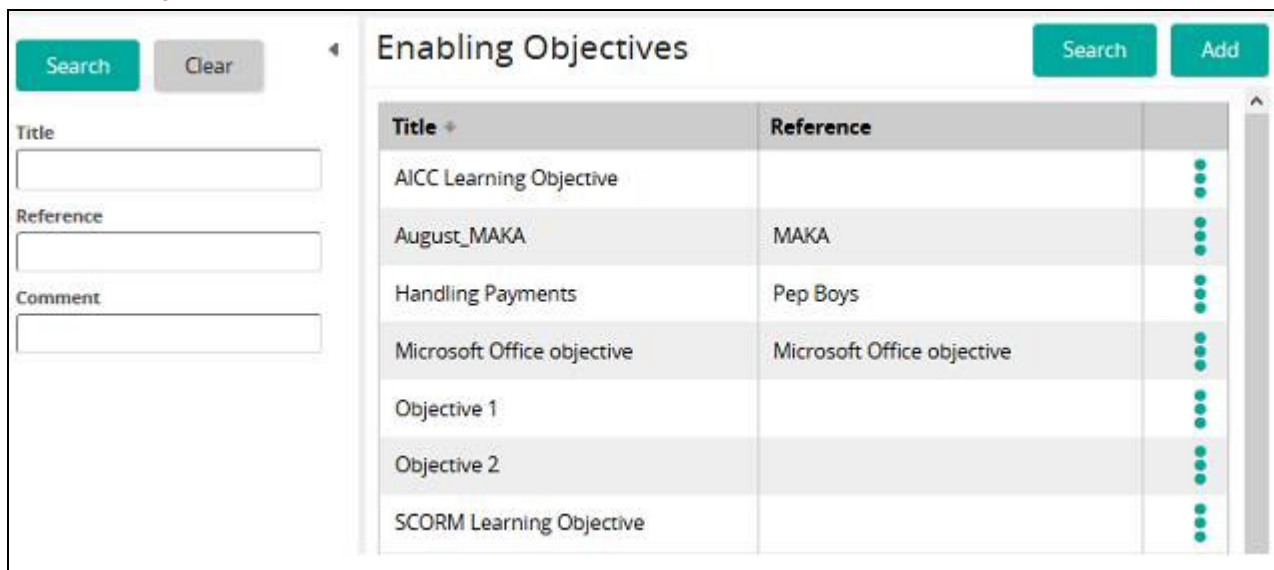
5. (If applicable) Type a reference for the performance objective to make it easier to find in searches.
6. (If applicable) Type a comment.
7. In the Enabling Objective section, click **Add** and then:
 - a. Search for and select an enabling objective or objectives
 - b. Click **Confirm**.
8. Click **Add**.

Enabling objectives

Enabling objectives identify the specific knowledge and performance expected for a single objective within a task within a job role. Each enabling objective defines a specific objective that can be measured by a single evaluation item within the question bank.

Enabling objectives are used to define content in content objects and Rival Learn tracks the value of objectives as users interact with content. They can be linked to content activities and then used to define sequencing and navigation rules to control how users access content in a course. Refer to **Appendix A** (<https://portal.azure.com/#home>) Sequencing and Navigation.

Enabling Objectives page



Title	Reference
AICC Learning Objective	
August_MAKA	MAKA
Handling Payments	Pep Boys
Microsoft Office objective	Microsoft Office objective
Objective 1	
Objective 2	
SCORM Learning Objective	

The Enabling Objectives page lists the enabling objectives that have been set up in Rival Learn. On this page, an administrator can:

- View enabling objectives
- Search for enabling objectives
- Add an enabling objective
- Delete an enabling objective
- View properties for an enabling objective

Enabling Objective Properties page



ENABLING OBJECTIVE PROPERTIES Add Refresh

QUALITY ASSURANCE

Title *

Reference

Comment

Links

View Links

On this page, an administrator defines enabling objectives.

Fields

Title: Type a title for the enabling objective.

Reference: Type a reference for this item to make it easier to find in searches.

Comment: Type a comment for the enabling objective.

Links: Click **View Links** to see any associated links to assignments, content, questions, or exams.

Add an enabling objective

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Enabling Objectives**.

The **Enabling Objectives page** (page 181) opens.

3. Click **Add**.

The **Enabling Objective Properties page** (page 182) opens.

4. Type a title for the enabling objective.
5. (If applicable) Type a reference for the enabling objective to make it easier to find in searches.
6. (If applicable) Type a comment.
7. Click **Add**.

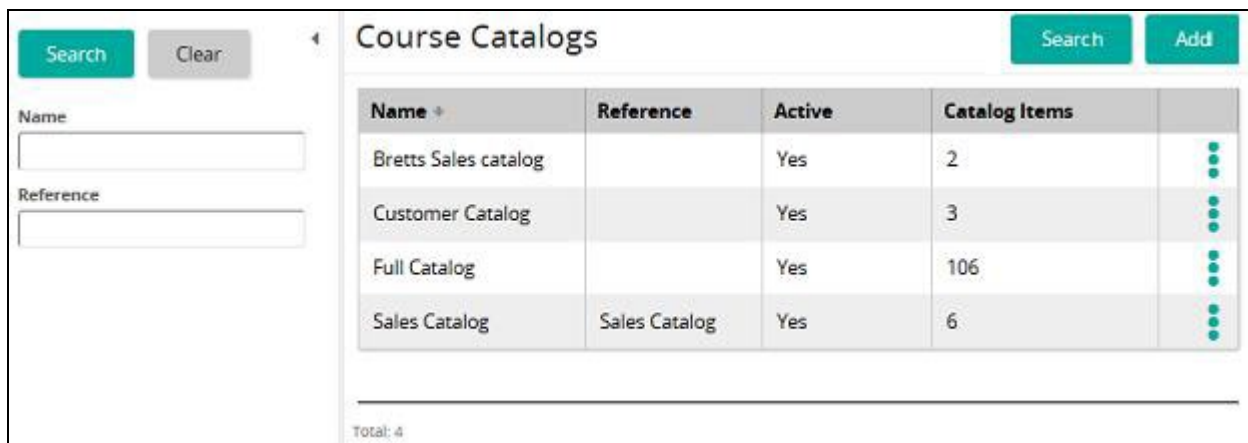
Course catalog

A course catalog provides students with a list of available training courses for an organization. It can contain both internal training items as well as external eCommerce training items for purchase. An organization can have more than one course catalog. A Rival Learn administrator creates and maintains course catalogs on the Course Catalog page in the Administration Portal. Students access and view course catalogs in the Student Portal.

A course catalog contains course catalog items, which are either eCourses or training activities. Only active course catalog items appear in a course catalog.

A course catalog can be available to all users or restricted by membership. When membership is assigned to a course catalog, only users who match the membership criteria can view items in the course catalog.

Course Catalogs page



Name	Reference	Active	Catalog Items	
Bretts Sales catalog		Yes	2	⋮
Customer Catalog		Yes	3	⋮
Full Catalog		Yes	106	⋮
Sales Catalog	Sales Catalog	Yes	6	⋮

Total: 4

The Course Catalogs page shows the course catalogs available in Rival Learn. The page shows course catalog name, reference, and whether the catalog is active (available in the Student Portal) or inactive (not available in the Student Portal). On this page, you can:

- Search for course catalogs by name or reference
- Add a new course catalog
- View properties for course catalogs
- Access and make changes to existing course catalogs

Course Catalog page


COURSE CATALOG

Save

Refresh

✕

QUALITY ASSURANCE

Name *

Full Catalog

Reference

Description

☒ Active

Course Catalog Items

☒	Name	Price	
☐	AC SCORM IBM2	0.00	⋮
☐	Accounting Orientation		⋮
☐	Adaptive Learning Demo eCourse		⋮

On the Course Catalog Properties page, you define the properties for a course catalog. This includes adding course catalog items to the catalog.

Fields

Name: Type a name for the course catalog.

Reference: Type a reference for this item to make it easier to find in searches.

Description: Type a description for the course catalog.

Active: This option controls whether a course catalog is available in the Student Portal. If selected (checked), the catalog is available and students can access to select courses. If unchecked, the catalog is not available in the Student Portal.

Membership Access only: If you want the course catalog to be:

- Available to all students regardless of membership affiliation, leave this box unchecked.
- Limited to members of a membership group, check this box and then select **Add** to select a membership group or groups.

Add (create) a course catalog in Rival Learn

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Course Catalog**.

The **Course Catalogs page** (page 183) opens.

3. Click **Add**.

The **Course Catalog page** (page 184) opens.

4. Type a name for the course catalog.
5. Complete all the other fields as appropriate.
6. Click **Add**.

Add a course catalog item to a course catalog

Note: This topic focuses on the most direct way of adding course catalog items to a course catalog. An alternate method is the **course catalog item method** (see "**Add a course catalog item to a course catalog (course catalog item method)**" on page 190).

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Course Catalog**.

The **Course Catalogs page** (page 183) opens.

3. For the course catalog you want, click  and then click **Properties**.

The **Course Catalog page** (page 184) opens.

4. In the Course Catalog Items section, click **Add**.
5. On the Course Catalog Items page, search for and select a course catalog item or catalog items, then click **Confirm**.

Tip: To select all course catalog items, click the check box beside the Name heading.

Only non-duplicate catalog items can be added. If you selected duplicate catalog items, a warning message appears.

6. Click **Save**.

Remove a course catalog item from a course catalog

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Course Catalog**.
3. For the course catalog you want, click  and then click **Properties**.

The **Course Catalog page** (page 184) opens.

4. In the Course Catalog Items section, click the check box beside the course catalog item to remove.
5. Click **Delete**.
6. Click **Save**.

The course catalog item is no longer in the course catalog.

Change a course catalog

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Course Catalog**.

The **Course Catalogs page** (page 183) opens.

3. For the course catalog you want, click  and then click **Properties**.

The **Course Catalog page** (page 184) opens.

4. Make changes as appropriate. Typical changes may include modifying catalog name, adding or removing course catalog items, or inactivating course catalog.
5. Click **Save**.

Inactivate a course catalog

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Course Catalog**.

The **Course Catalogs page** (page 183) opens.

3. For the course catalog you want, click  and then click **Properties**.

The **Course Catalog page** (page 184) opens.

4. Uncheck the **Active** check box.
5. Click **Save**.

In the Student Portal, the catalog is no longer available for selection.

Delete a course catalog

- While deleting a course catalog is allowed in Rival Learn, a better option is to inactivate the course catalog—especially if you intend to use the course catalog again in the future.
1. From the navigation bar, click **Learning**.
 2. Under Direct, click **Course Catalog**.

The **Course Catalogs page** (page 183) opens.

3. For the course catalog you want, click  and then click **Delete**.
4. At the confirmation prompt, click **OK**.

Course catalog item

A course catalog item is a training opportunity for a student. It can be an eCourse or training activity and must be active so that students can view and select it from a course catalog.

A course catalog item can be free or available for purchase. If purchasable, the catalog item can have the same price across all catalogs or different prices in various catalogs. For eCourse catalog items, a subscription can be set up with a price specific to a subscription period. A subscription period is a period of time when the eCourse is available for purchase in a course catalog.

A Rival Learn administrator creates and maintains course catalog items on the Course Catalog Item page in the Administration Portal. Students select course catalog items from a course catalog in the Student Portal.

Course Catalog Items page

Search

Clear

Name

Product Code

Item Type

Course Catalog Product

Course Catalogs

Category

Course Catalog Items

Search

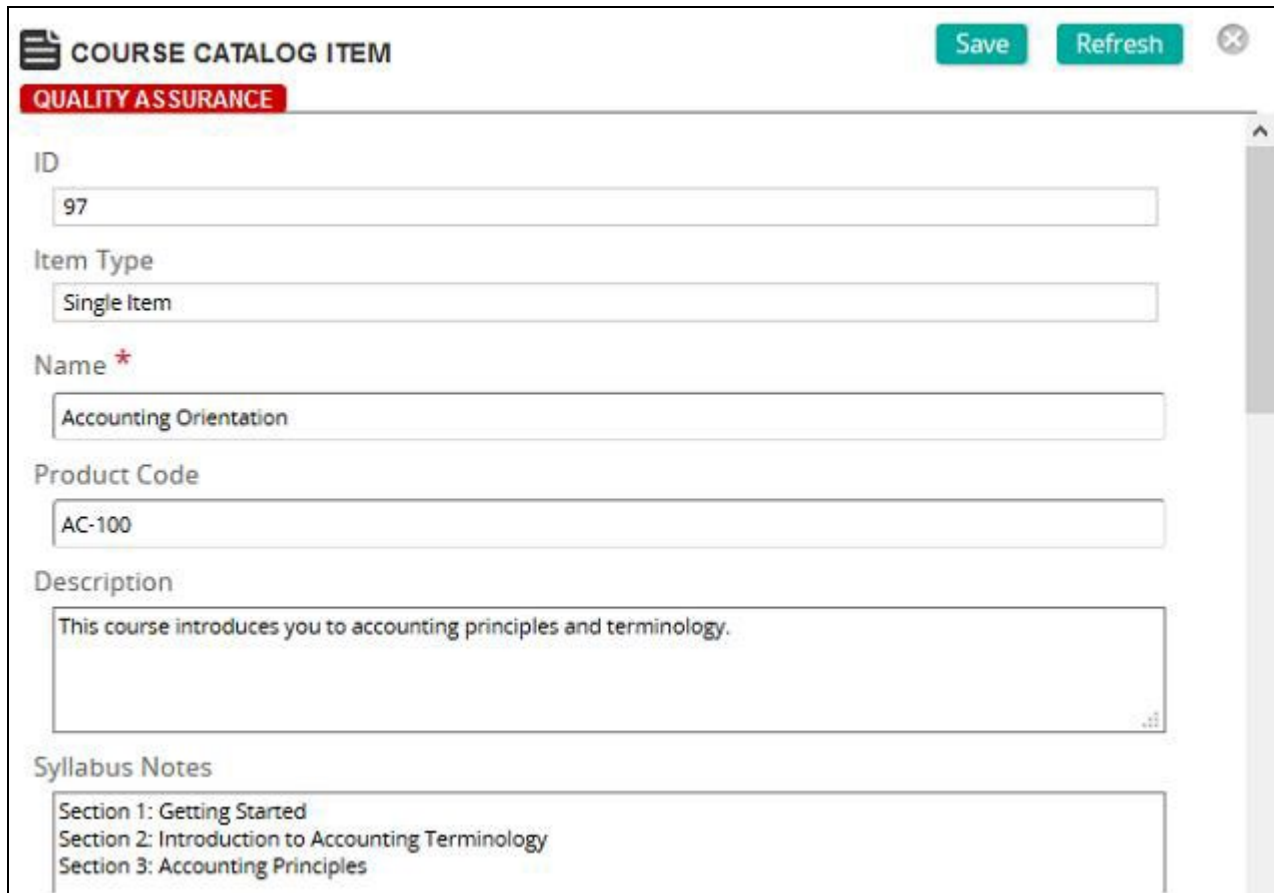
Add

Name	Product Code	Item Type	Active	Price	
AC SCORM IBM2	AC-1011	Single Item	Yes		
Accounting Orientation	AC-100	Single Item	Yes		
Adaptive Learning Demo eCourse		Single Item	Yes		
Analyzing Poor Performers (Hands on)	EC-102	Single Item	Yes		
Analyzing Poor Performers		Single Item	Yes		
APHL eCourse		Single Item	Yes		
Appointment Mastery Overview	EC-101	Single Item	Yes		
Asbestos Safety Training		Single Item	Yes		

The Course Catalog Items page shows the course catalog items available in Rival Learn. On this page, you can:

- Use the search function to find a specific course catalog item or items
- Add a course catalog item to Rival Learn
- Access the Course Catalog Item Properties page to make changes to existing course catalog items
- Delete a course catalog item

Course Catalog Item page



The screenshot shows a web form titled "COURSE CATALOG ITEM" with a "QUALITY ASSURANCE" banner. The form contains several input fields: "ID" with the value "97", "Item Type" with the value "Single Item", "Name" with the value "Accounting Orientation", "Product Code" with the value "AC-100", "Description" with the text "This course introduces you to accounting principles and terminology.", and "Syllabus Notes" with a list of three sections: "Section 1: Getting Started", "Section 2: Introduction to Accounting Terminology", and "Section 3: Accounting Principles". At the top right of the form are "Save" and "Refresh" buttons, and a close button (X).

Use this page to create a course catalog item or modify an existing one. The items you create here are eligible for inclusion in a course catalog.

Fields

Item Type: Select **Single Item** if this course catalog item is a single item or **Bundle** if this course catalog item is comprised of multiple items.

Tip: A bundle is a collection of course catalog items (eCourses only) that are displayed in the Course Catalog as a group of courses.

Name: Type the name of the course catalog item.

Product Code: Type reference text or product code for this item to make it easier to find in searches. Product code appears below a course name in a course catalog in the Student Portal.

Description: Type a brief description of the course catalog item. This description is displayed in a course catalog in the Student Portal when a student clicks a course's Show More link.

Syllabus Notes: Syllabus Notes are an outline of the subjects and topics covered in a course. It gives students a quick look at the structure of a course. Type syllabus notes in this field. Syllabus notes are displayed in a course catalog in the Student Portal when a student clicks the course catalog name link.

Active: This check box controls whether the course catalog item appears in a course catalog. Select (check) this box to make the catalog item active and eligible to appear in a course catalog. Otherwise, uncheck so that the catalog item does not appear in a course catalog.

Tip: Use the Active check box to remove a course catalog item from a catalog rather than deleting it from Rival Learn. You may want to re-add the course catalog item to course catalogs later.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list. Assigning categories to catalog item allows you to filter when searching a course catalog.

Price: (If Item Type is Single Item and ecommerce is enabled) Enter the price for this item or leave blank if there is no charge.

Note: A course catalog item can have a different price in various course catalogs. You set catalog-specific prices in the Course Catalog section on this page.

Course Catalog Product (If item Type is Single Item): Every course catalog item must have an ecourse or training activity associated with it. Click  to search for and select the ecourse or training activity for this course catalog item.

Bundle Items (If Item Type is Bundle): Click  to search for and select course catalog ecourses to comprise this course catalog item.

Tip: Use the arrows to arrange how you want the bundled ecourses to appear on the Course Catalog Details page.

Course Catalogs: For a course catalog item to appear in a course catalog, it must be associated with a course catalog. You make the association here. A course catalog item can appear in multiple course catalogs. Click **Add** and then select the course catalog or catalogs.

(If Item Type is Single Item and ecommerce is enabled) You can also set *catalog-specific* prices for a catalog item here. In the Price box, enter a price. This price overrides the price set in the Price field.

Expiration Method: Select one of the following options:

- **Never Expires:** The course catalog item (eCourse) never expires and is available in a course catalog as long as it is active.
- **Subscriptions:** The subscription period determines how long a purchased catalog item (eCourse) is active on the Training page and available to launch. After the subscription period ends, the eCourse is removed from the Training page and is no longer available to the user.

Subscriptions (only if Expiration Method is Subscriptions): Click **Add** to create a subscriptions period for the eCourse. On the Subscriptions page, complete the following fields:

- **Subscription Period:** Enter a number to represent the subscription period.
- **Subscription Units:** Select the unit for the subscription: days, weeks, or months.
- **Price:** Enter the price for the eCourse during the subscription period. This can be the same amount as in the Price box or different if the cost is different during the subscription period.

Direct Link: A system-generated direct link to this course catalog item. You can copy this link and provide to students so they can directly access this course. For example, a training coordinator can copy this link and email to prospective students. When the students click the link, the course catalog opens and displays the course.

Note: For the direct link to work, a student must be authenticated and have access to the course catalog item. If not, an error message appears when the student clicks the link.

Add a course catalog item to Rival Learn

1. From the navigation bar, click **Learning**.

2. Under Direct, click **Course Catalog Item..**

The **Course Catalog Items page** (page 187) opens.

3. Click **Add**.

The **Course Catalog Item page** (page 188) opens.

4. Complete the required fields. You must at least provide a name and associate a course catalog product (ecourse or training activity) to the course catalog item.
5. Complete any optional fields as appropriate.
6. Click **Add**.

Add a course catalog item to a course catalog (course catalog item method)

Note: This topic focuses on one way of adding course catalog items to a course catalog. Another method is the **course catalog method** (see "**Add a course catalog item to a course catalog**" on page 185).

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Course Catalog Item..**
- The **Course Catalog Items page** (page 187) opens.
3. Find the course catalog item you want to add to a course catalog.
4. Click  and then click **Properties**.

The **Course Catalog Item page** (page 188) opens.

5. In the Course Catalogs section, click **Add**.
6. Search for and select the course catalog or catalogs, then click **Confirm**.

Tip: To select all course catalogs, click the check box beside the Name heading.

7. Click **Save**.

Change a course catalog item

Tip: You cannot make changes to a course catalog item if it has been purchased in an existing transaction.

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Course Catalog Item..**
- The **Course Catalog Items page** (page 187) opens.
3. For the course catalog item you want to change, click  and then click **Properties**.

The **Course Catalog Item page** (page 188) opens.

4. Make changes as appropriate. Typical changes include modifying catalog item name, adding or changing a price, removing catalog item from a course catalog, or inactivating.

Tip: You cannot change the Item Type.

5. Click **Save**.

Inactivate a course catalog item

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Course Catalog Item..**

The **Course Catalog Items page** (page 187) opens.

3. For the course catalog item you want to inactivate, click  and then click **Properties**.

The **Course Catalog Item page** (page 188) opens.

4. Uncheck the **Active** check box.
5. Click **Save**.

In the Student Portal, the course catalog item no longer appears in a course catalog.

Delete a course catalog item

- Instead of deleting a course catalog item, a better option is to inactivate—especially if you intend to use the course catalog item again in the future.
- You cannot delete a course catalog item if it has been purchased in an existing transaction.

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Course Catalog Item..**

The **Course Catalog Items page** (page 187) opens.

3. For the course catalog item you want to delete, click  and then click **Delete**.
4. At the confirmation prompt, click **OK**.

Provide a direct link to a course catalog item

1. From the navigation bar, click **Learning**.
2. Under Direct, click **Course Catalog Item..**

The **Course Catalog Items page** (page 187) opens.

3. For the course catalog item you want, click  and then click **Properties**.

The **Course Catalog Item page** (page 188) opens.

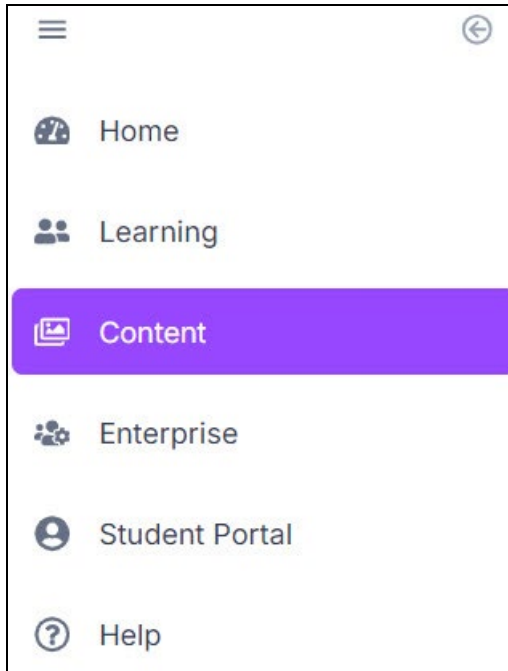
4. In the Direct Link section, copy the direct access link.

Tip: Highlight the link, right-click and select **Copy**.

5. Paste the link into an email, document, Powerpoint presentation, and so on.
6. Click  to close the page.

Create and manage content

The Content module contains all the collaborative authoring tools that you use to create reusable content and publish eCourses. This includes managing media assets, exams, surveys, and assignments.



In this section

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Staging	228
Library	229
Delivery	254

Workflow

Content workflow is initially defined when an administrator sets up content workflow stages on the **Company page** (on page 366), which is accessible via the Settings link under the Enterprise Management tab.

The Content Object (CO) Properties sheet contains a workflow status and stages area. Content objects can be in Authoring, Staging, or Library stage.

- Authoring includes the initial development phases of the content object. This is where content objects are created and edited.
- Staging is the review and approval, or return-for-revisions, of the content object. To revise the content object it must be returned to Authoring status.
- Library (**Library>Content Library**) is for all approved content objects. To revise the content object it must be returned to Authoring status.

If the workflow notifications are set up, changes in workflow status can trigger a workflow notification to the appropriate role.

Development stages can be customized to further indicate the status.

Users can:

- Change the Status between Authoring, Staging, or Library.
- Change the content workflow stage.
- Change both the status and workflow stage.
- Sort content objects by workflow status in the CO list.

When Content Workflow Stages are not defined, users can change the status between Authoring, Staging, or Library.

Security settings can be set against functions within Authoring, Staging or Library. Security settings will affect whether users can change status in the property sheets.

Users require EDIT privilege to modify CO status in each of the three tabs: Authoring, Staging or Library.

Users require APPROVAL privilege in Staging to move a CO from Authoring to Library or from Staging to Library.

Authoring

Authoring deals with the initial development requirements of the content object.

Content objects

A content object is a reusable content structure. It consists of a collection or cluster of activities that—when combined—form an eCourse. Content objects can be reused in multiple courses or linked to other content objects. Content objects may be referred to as Reusable Learning Objects (RLOs) or Shareable Content Objects (SCOs).

In Rival Learn, a content object might include:

- A single imported course
- Something built in Rival Learn
- A group of imported courses

A content object can be stand-alone or made up of smaller or multiple content objects.

Key info

- A content object's structure can be made up of various content types like No Content (Header Item), assignment, exam, external web link, **HTML** (see "**HTML Editor**" on page 61), links to other content object, media file, survey, and training activity.
- Collaborative authoring allows an individual or workgroup to own a content object.
- A content object can have a defined workflow and modifiable status.
- Best practice: Only approved content objects from the *Content Library* should be used in an eCourse.

Good to know

- The system uses check in/check out rules to control access to content objects.
- A content object can be defined as proctored. A proctored content object is locked and cannot be viewed unless unlocked by a privileged proctor (who is defined for the object). A proctor must be a member of a workgroup associated to the content object.
- Proctored content objects can be either SCORM or AICC.

Content Objects (Development) page

Search

Clear

Name

Reference

Type

Status

Description

Workflow

Categories

Keywords

Content Objects (Development)

Search

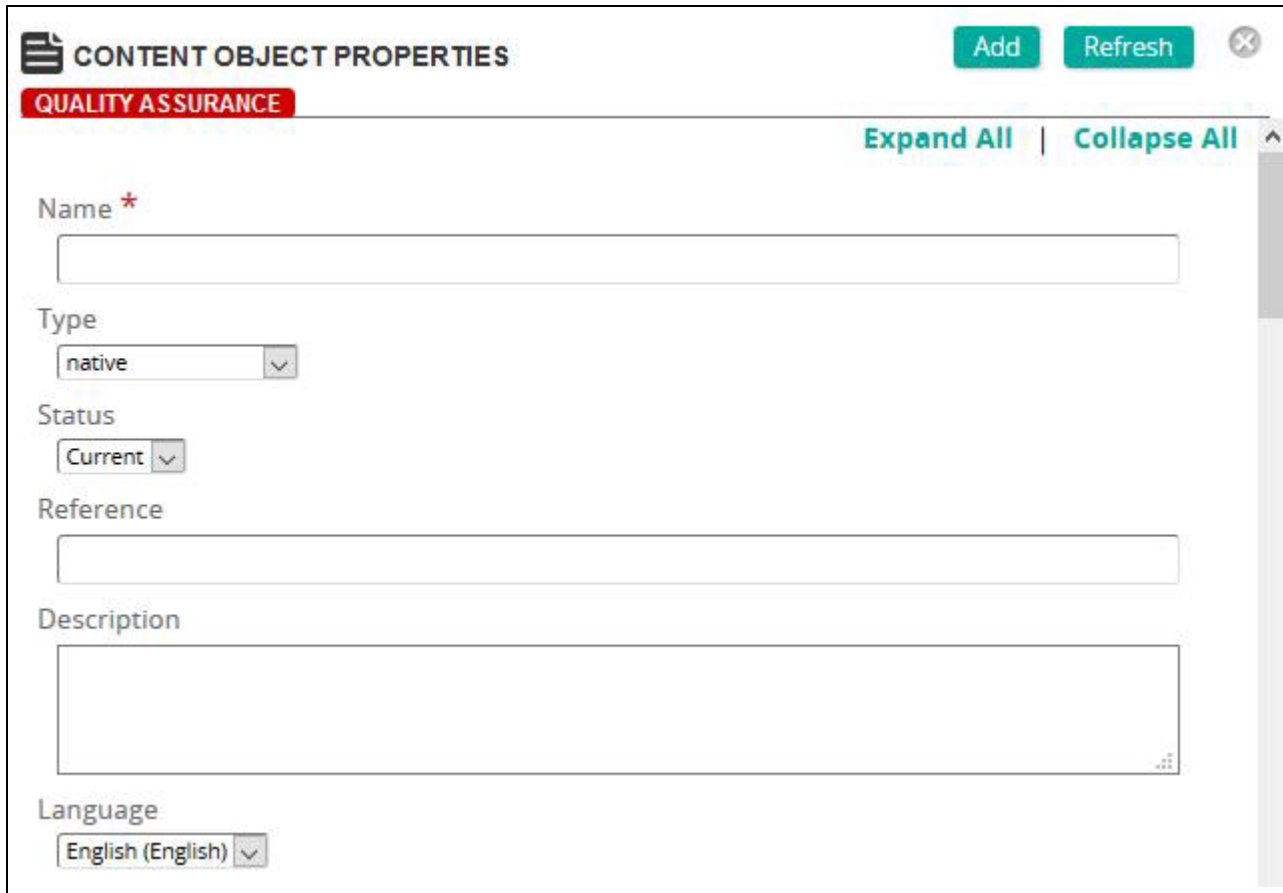
Add

Name	Reference	Type	Status	Language	Workflow	
A001		SCORM 1.2 SCO	Current	English		
Access to Medical and Exposure Records		SCORM 1.2 SCO	Current	English		
ACM Disturbance		SCORM 1.2 SCO	Current	English		
Adaptive Learning Demo		native	Current	English		
Air Monitoring		SCORM 1.2 SCO	Current	English		
Analyzing Poor Performers		native	Current	English		
Analyzing Poor Performers		SCORM 1.2 SCO	Current	English		
Asbestos		SCORM 1.2 SCO	Current	English		

On the Content Objects (Development) page, you can search for and view content objects in the development stage. You can also:

- View the properties for a content object
- Preview a content object
- Add a content object
- Author a content object
- Copy a content object
- Delete a content object

Content Object Properties page



The screenshot shows the 'CONTENT OBJECT PROPERTIES' form. At the top right are 'Add' and 'Refresh' buttons. Below the title bar is a red 'QUALITY ASSURANCE' banner. To the right of the banner are 'Expand All' and 'Collapse All' links. The form fields are: 'Name' (required, indicated by a red asterisk) with a text input; 'Type' with a dropdown menu showing 'native'; 'Status' with a dropdown menu showing 'Current'; 'Reference' with a text input; 'Description' with a large text area; and 'Language' with a dropdown menu showing 'English (English)'.

On the Content Object Properties page, you define the properties for a content object.

Fields

Name: Type a name for the content object.

Type: Select one of the following options:

- native
- SCORM 1.2 SCO
- SCORM 1.2 Asset
- SCORM 2004 SCO
- SCORM 2004 Asset
- AICC File-based
- AICC Web-based

Reference: Type a reference for this item to make it easier to find in searches.

Description: Type a description for the content object.

Language: Select a language for the content object.

Version: Type the version number of the content object. Automatic increments of the content object version designator occur only if Concurrency Management is enabled.

Major Topic Area: Type the major topic for the content object.

Author Notes: Type notes for the content object.

Workflow: In the Object Version text box, type the version of the object.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Keywords: To assign a keyword, type a keyword. Click the left arrow to add the keyword to the list. Repeat for each keyword that you want to assign.

Features: Features are media items defined as features that can be associated to a content object. To add features, click **Add**. On the Features page, select one or more features or click **Select All**, and then click **Confirm**.

Glossary Terms: Glossary terms are automatically added to the eCourse glossary whenever a content object is used in an eCourse. To add glossary terms to the content object, click **Add**. On the Glossary Banks page, search for and select a glossary term or terms, then click **Confirm**.

Links: Click **View Links** to see any associated links to eCourses, training activities, or content objects.

Add a content object

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Content Objects**.

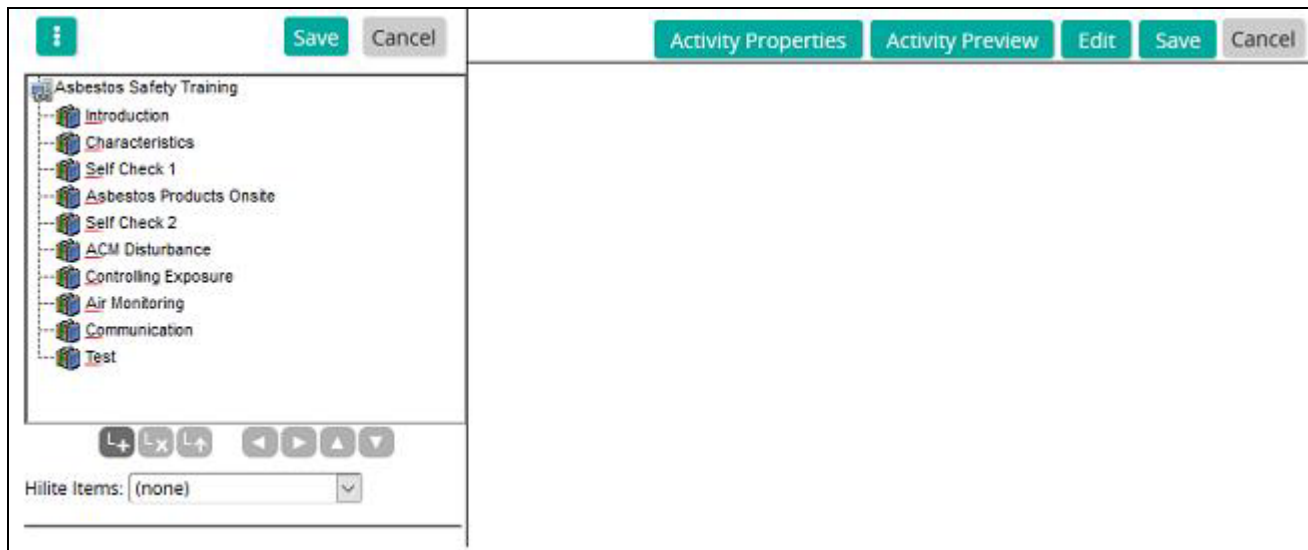
The **Content Objects (Development) page** (page 194) opens.

3. Click **Add**.

The **Content Object Properties page** (page 195) opens.

4. Give the content object a name.
5. Select the type for the content object.
6. Type a reference and description.
7. Specify a version and select a language.
8. Specify major topic areas and author notes.
9. Specify the object version.
10. Add any categories, keywords, features, and glossary terms as needed.
11. Select review content as needed.
12. Click **Add**.

Content Object Authoring page



On the Content Object Authoring page, you author an object.

The Activity tree is on the left side of the page. This is where you add activities to the content object to build the menu. The system adds a new activity to the top of the tree. Activities are added from the top down. Use the buttons at the bottom of the panel to add, remove, or move an activity.

Activity tree buttons

-  Inserts an activity into the content structure
-  Removes selected activity
-  Promotes selected activity to a linked content object
-  Moves the selected activity left in the content structure
-  Moves the selected activity right in the content structure
-  Moves the selected activity up in the content structure
-  Moves the selected activity down in the content structure

Author a content object

- From the navigation bar, click **Content**.
- Under Authoring, click **Content Objects**.
The **Content Objects (Development) page** (page 194) opens.
- Search for and select the content object that you want to author.
- In the list beside a content object, click  and then click **Author**.

The **Content Object Authoring page** (page 197) opens.

5. Add activities to build the menu:

- a. Click .

The system adds a new activity to the top of the tree. Activities are added from the top down.

- b. Use the buttons at the bottom of the panel to add, remove, or move an activity.

6. Title each activity and associate the appropriate type of content:

- a. In the Title box, type a title for the activity.
- b. In the Content drop-down list, select the type of content for the activity.

7. Click **Save**.

8. Link activity to content:

- a. Click an activity to highlight it.
- b. Click **Edit**.
- c. Click **Change** to search for and select the appropriate content.
- d. Click **Save** to save your selection.
- e. (Optional) Click **Options>Content Object Preview** to view the content as it would look in the course.
- f. Continue with these steps until desired content has been attached to the appropriate activity.

Rollup course mastery on completion only

Rival Learn expects that all required activities send a success status of Passed before it rolls up the activity as mastered. Some content vendors do not always send success status of Passed but instead send a Completed completion status. In these cases, the content is never considered mastered because a Passed status is not communicated.

You can now identify course content that only sends Completion status and consider the course to be mastered when only a Completed status is communicated to Rival Learn.

Identifying content that does not send a Passed status

Rival Learn can detect content that does not send a Passed status when previewing content in the Admin Portal. Launch the content in Preview mode from the Content>Authoring tab. Whenever content commits completion status, but does not send satisfied status, Rival Learn detects this in Preview mode. When detected, you are prompted to consider turning Allow Course to Roll Up on Completion Only option ON in the course properties for courses that link to this type of content:

The page at <https://v20153ad-greenlight.silkroad-eng.com> says: 

This content may have problems rolling up mastery if it only communicates completion status. Consider setting "Allow Course to Roll Up on Completion Only" in the Course properties that use this content.

OK

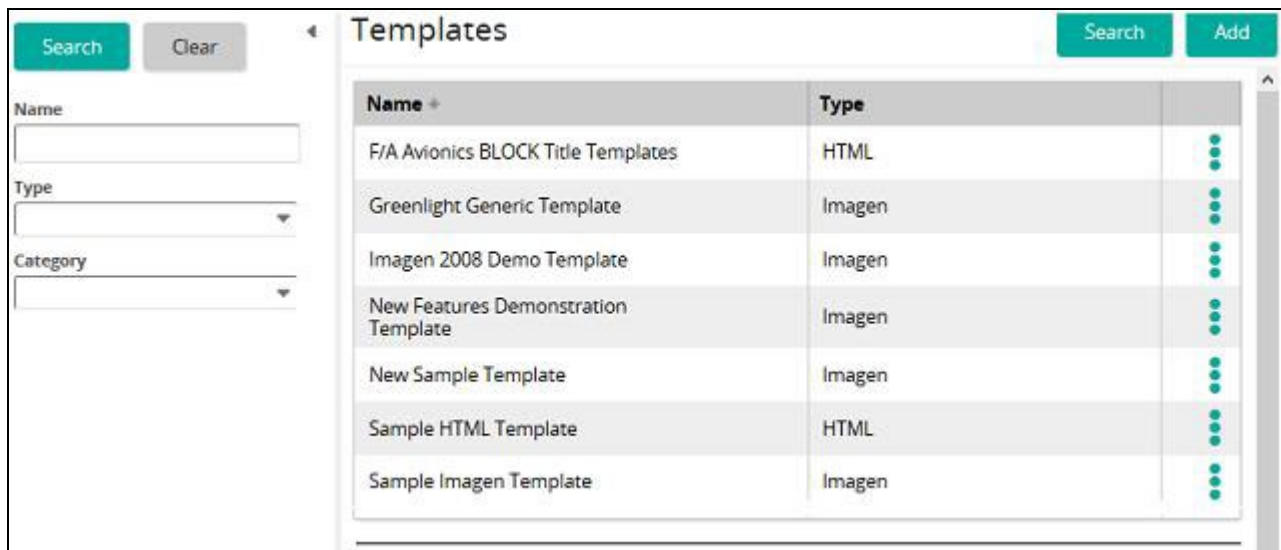
Modify course completion properties

The Allow Course to Roll Up on Completion Only option on the eCourse Properties page controls how Rival Learn interprets satisfaction and completion status for eCourses, See **eCourse Properties page** (on page 255) for more information.

Content Templates

Content templates allow administrators to create a template, similar to a style sheet that can be used by content developers as the framework for creating a consistent look in their content development. Content templates are HTML templates.

Templates page

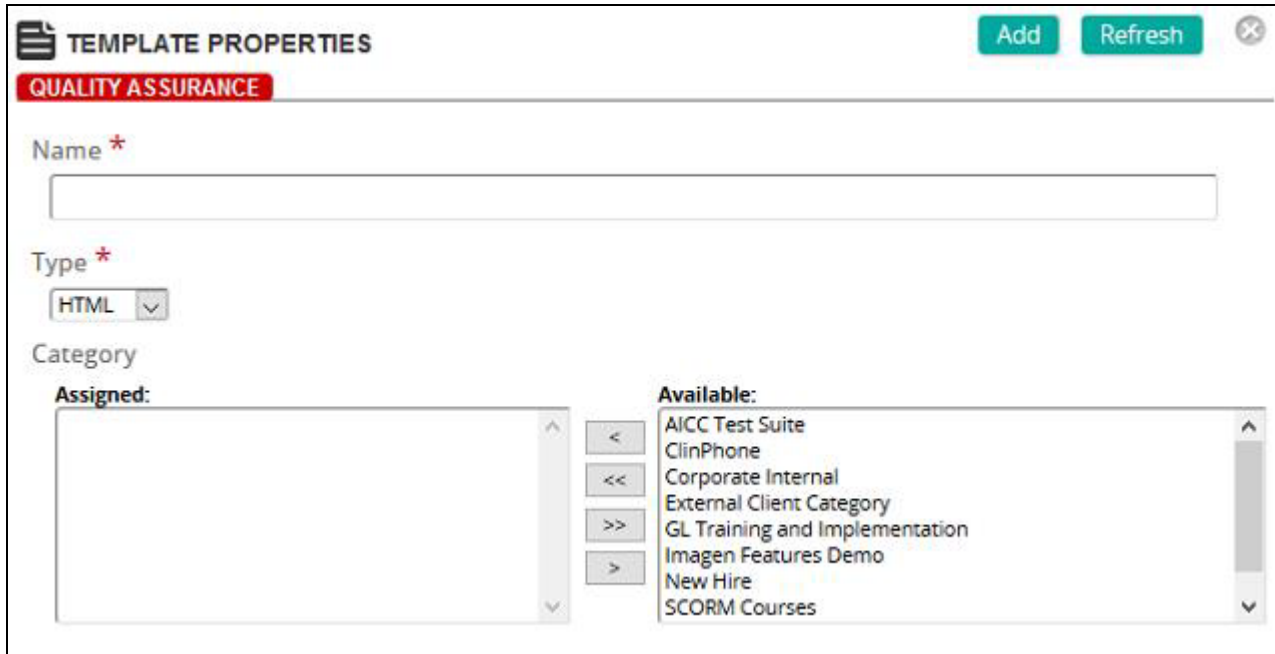


Name +	Type	
F/A Avionics BLOCK Title Templates	HTML	
Greenlight Generic Template	Imagen	
Imagen 2008 Demo Template	Imagen	
New Features Demonstration Template	Imagen	
New Sample Template	Imagen	
Sample HTML Template	HTML	
Sample Imagen Template	Imagen	

On the Templates page, you can search for and view existing content templates. You can also:

- Add a template
- View the properties for a template
- Preview a template
- Author a template
- Delete a template

Template Properties page



On the Feature Properties page, you define the properties for a feature.

Fields

Name: Type a name for the template.

Type: Displays the template type: *HTML* (see "*HTML Editor*" on page 61).

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Add a content template

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Content Templates**.

The **Templates page** (page 199) opens.

3. Click **Add**.

The **Template Properties page** (page 200) opens.

4. Name the template.
5. (If applicable) Assign a category or categories.
6. Click **Add**.

Features

Features are files that are added to a content object because they will enhance the course content. For example, a course designer might add a Microsoft Word "cheat sheet" to an online Microsoft Word course so the student has a short, one page job aid with commands to use when working with Word documents.

Any files stored in the Media/Asset Bank can be used as a feature such as graphics, audio, Word documents, and PDF files.

To use features within a course, files must be added to Rival Learn first and then tagged as a feature. Then, when the course is being built, the feature can be added to the course where it is appropriate.

Features page

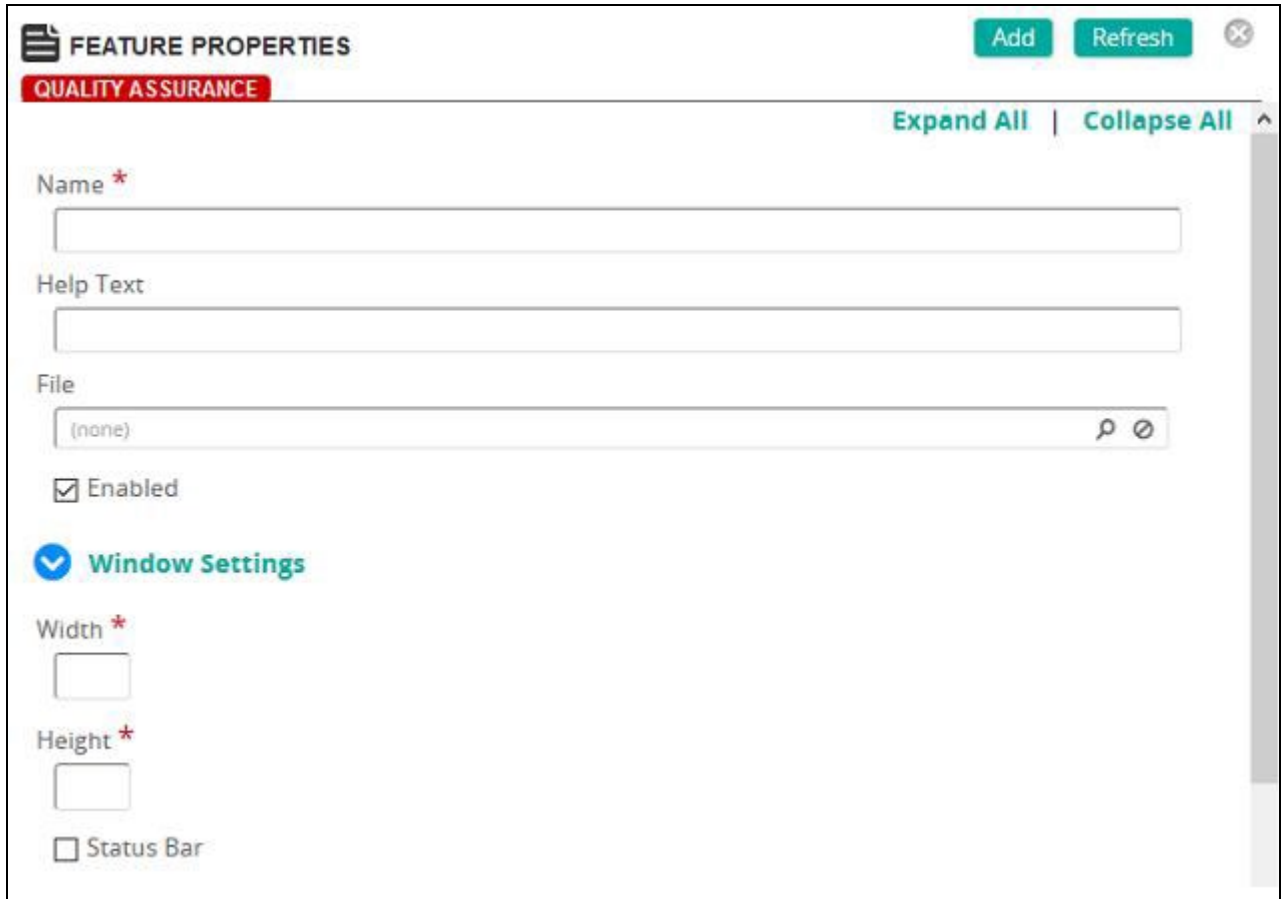
Features Add				
Name +	Help Text	File	Enabled	
**Documentation - Tech Pub for CF-18 Avionics	88Access the Technical Publications Document by clicking on the link above.	accident_incident_Report.doc	Yes	
EHSI Emulator			Yes	
Harvard 3D cockpit	Harvard 3D cockpit		Yes	
MSDS Table	MSDS information for Severity Violations		Yes	
Pop Up Harvard			Yes	

Total: 5

The Features page shows the features that have been added to Rival Learn. On this page, an administrator can:

- Add a feature
- View properties for a feature
- Delete a feature

Feature Properties page



The screenshot shows the 'FEATURE PROPERTIES' window. At the top, there are 'Add' and 'Refresh' buttons. Below them is a red 'QUALITY ASSURANCE' banner. To the right of the banner are 'Expand All' and 'Collapse All' links. The main form contains the following fields:

- Name ***: A text input field.
- Help Text**: A text input field.
- File**: A dropdown menu showing '(none)' with search and clear icons.
- Enabled**: A checked checkbox.
- Window Settings**: A section header with a blue checkmark icon.
- Width ***: A text input field.
- Height ***: A text input field.
- Status Bar**: An unchecked checkbox.

On the Feature Properties page, you define the properties for a feature.

Fields

Name: Type a name for the feature.

Help Text: Type the rollover help text for the feature.

File: Click  to search for and select a file to associate with the feature.

Enabled: Select this check box to make this new feature available to be added to Content Objects.

Window Settings

Width: Specify a width for the pop-up window that will contain the feature.

Height: Specify a height for the pop-up window that will contain the feature.

Status Bar: Select this check box to include a status bar on the pop-up window. Otherwise, leave unchecked to not include a status bar.

Preview: Click this button to preview what the feature will look like in the pop-up window.

Add a feature

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Features**.

The **Features page** (page 201) opens.

3. Click **Add**.

The **Feature Properties page** (page 202) opens.

4. In the Name box, type the name of the feature.
5. In the Help Text box, type the rollover help text.
6. From File, click  to search for and select a file to assign to the feature.
7. On the Media/Asset Bank page, click **Search** or filter the search by typing additional information into the filter boxes.
8. Select the check box of the media item then click **Confirm**.
9. Select the **Enabled** check box to make this new feature available to be added to Content Objects.
10. Under Window Settings, specify the size of the pop-up window in which the feature will download and appear.

Tip: Click **Preview** to preview how the feature will look.

11. If you want the pop-up window to have a status bar, select the **Status bar** check box.
12. Click **Add**.

Add a feature to a Content Object

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Content Objects**.

The **Content Objects (Development) page** (page 194) opens.

3. Click **Search** or filter the search by typing additional information into the filter boxes.
4. From the list of Content Objects, click the **Check Out** icon.
5. On the Concurrency Manager page, click **Check Out**.
6. On the message window, click **OK**.
7. From the list of Content Objects, click the **Options** icon then click **Properties**.

The **Content Object Properties page** (page 195) opens.

8. From Features, click **Add**.

The **Features page** (page 201) opens.

9. Select the check box of one or more feature or click **Select All**, then click **Confirm**.
10. Click **Save**.

Exams

Exams are built using questions created in the Question Bank library. They are delivered to a student as part of a Tree Menu Activity in a Content Object. Exams are built from questions stored in the Question Bank based on rules enabling objectives.

Exams page

Search

Clear

Exam Name

Reference

Enabling Objective

Type

Proctored

Category

Exams

Search

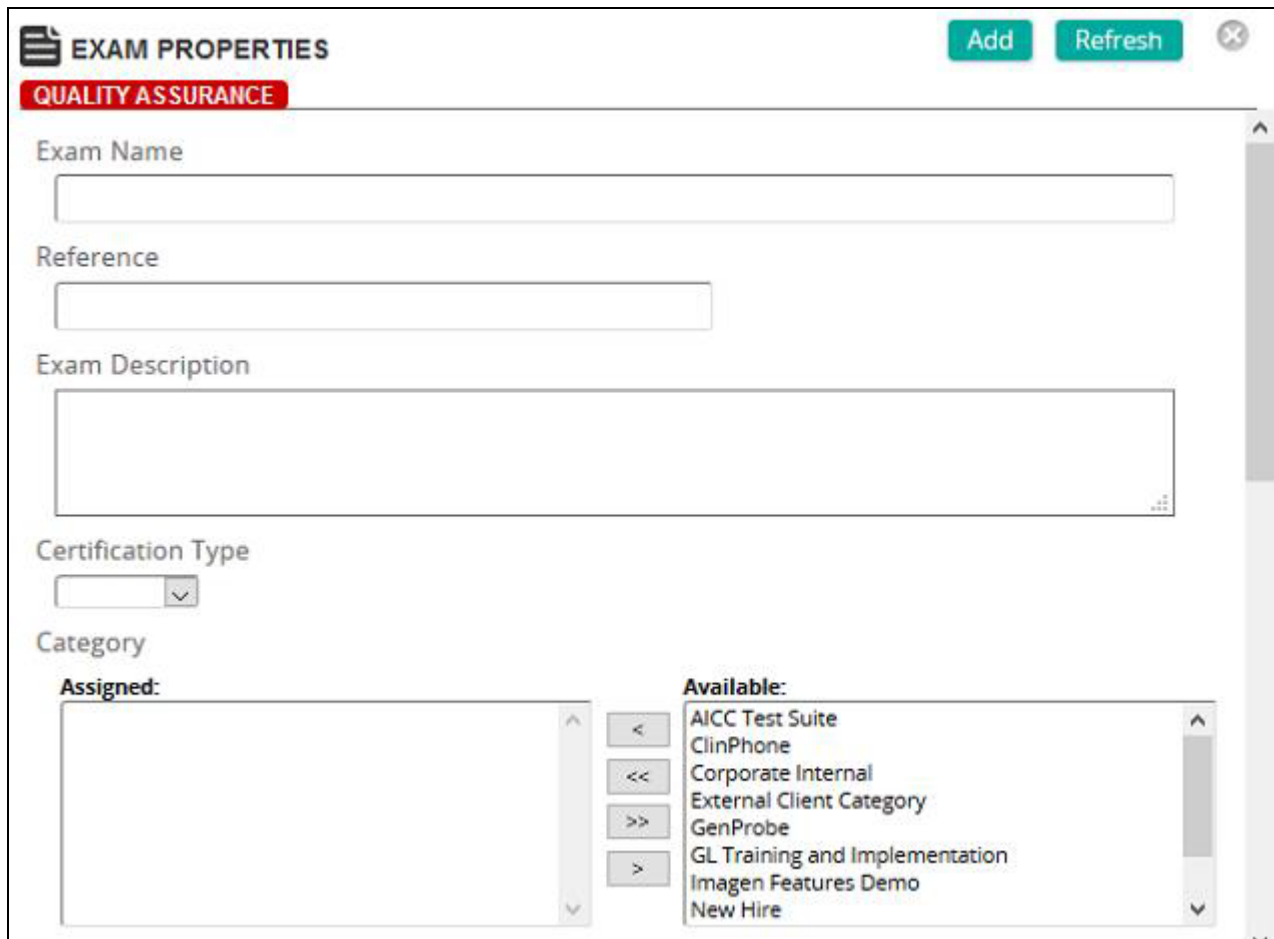
Add

Exam Name *	Reference	Type	Proctored	
Adaptive Learning Post-Test		Exam	No	
Adaptive Learning Pre-Test		Exam	No	
Bloodborne Pathogen Exam		Exam	No	
Busey Exam		Exam	No	
CRJ200 Pilot Training - AFCS		Exam	No	
Pep Boys Sample Exam		Exam	No	
SCORM/AICC Proficiency Exam		Exam	Yes	
Sexual Harrassment Policies		Exam	No	

On the Exams page, you can search for and view existing exams. You can also:

- Add (create) an exam
- View the properties for an exam
- Delete an exam

Exam Properties page



The screenshot shows the 'EXAM PROPERTIES' window with a 'QUALITY ASSURANCE' tab. It contains several input fields: 'Exam Name', 'Reference', and 'Exam Description'. Below these is a 'Certification Type' dropdown menu. At the bottom, there are two lists: 'Assigned' (empty) and 'Available' (containing: AICC Test Suite, ClinPhone, Corporate Internal, External Client Category, GenProbe, GL Training and Implementation, Imagen Features Demo, New Hire). Arrows are used to move items between these lists.

On the Exam Properties page, you define the properties for an exam.

Fields

Exam Name: Type a name for the exam.

Reference: Type a reference for this item to make it easier to find in searches.

Exam Description: Type a description of the exam.

Certification Type: Select a default certification type to define the certification and recertification time periods to meet a qualification condition.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Type: Select one of the following types of exam to be used for evaluation:

- **Exam:** Used as an evaluation. They measure how much learners know about the content. They are most often scored items that contributed to the overall score in an online course.
- **Self-Check:** Used as teaching tools to provide learners with practice exams. Users are provided with feedback for each question and cannot proceed to the next question until they have correctly responded to each question.

Max Attempts: Type the maximum number of attempts allowed for the exam. Setting a max attempt value will lock users out of the exam if they fail to master the exam within the max attempt limits. Admin users must reset user attempts by **unlocking a user** (see "**Unlock a user**" on page 133).

Proctored: Select this check box if the exam requires a proctor to unlock the exam for each student prior to allowing exam completion.

Proctor Workgroups: To limit by workgroups, click **Add** and then search for and select a workgroup or workgroups. (This only appears if Proctored check box is selected.)

Random Question Order in Test: Select this check box if you want the order of questions in the test to be randomized each time the exam is generated.

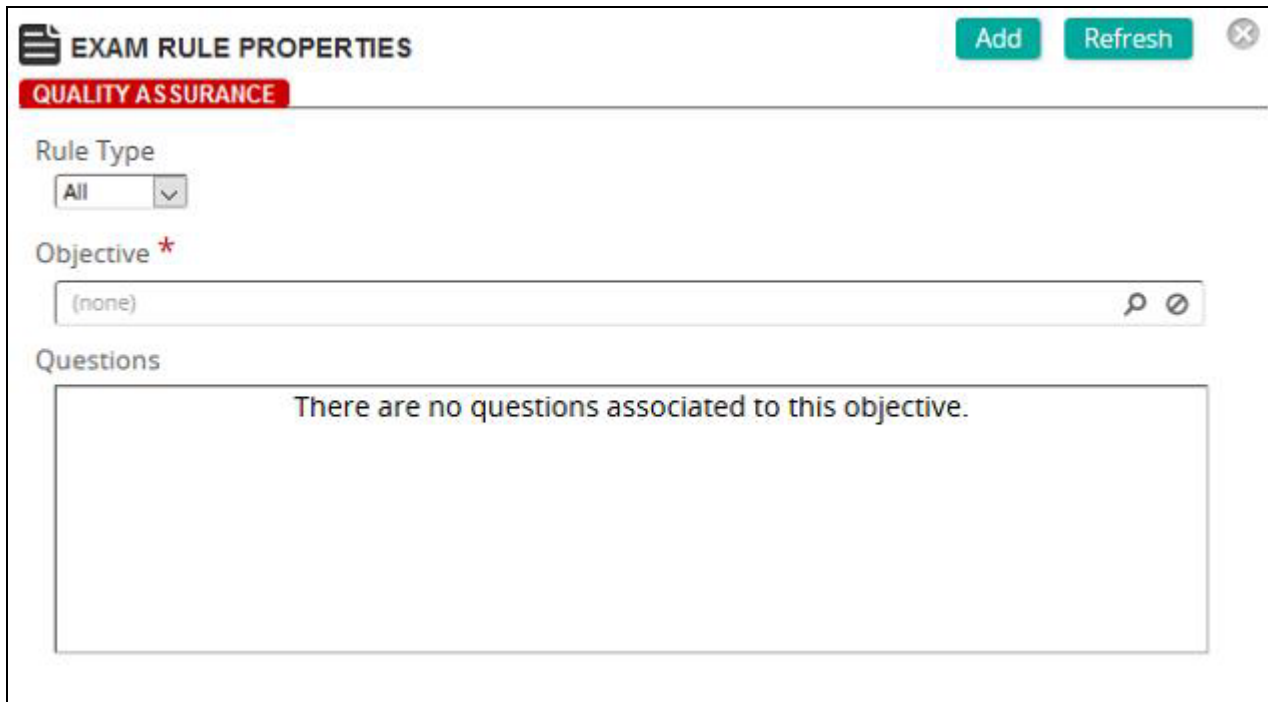
Random Choice Order in Question: Select this check box if you want the order of choices in questions to be randomized.

Note: Questions with Force Choice Order ON are ignored by this setting.

Exam Rules: Rules indicate which questions will be added to the exam. Click **Add** to create and add a rule or rules to this exam. You create rules on the Exam Rule Properties page.

Links: Click **View Links** to see any associated links to content or qualifications.

Exam Rule Properties page



On the Exam Rules Properties page, you define a rule and associate an objective.

Fields

Rule Type: Select one of the following:

- **All:** Generate all questions for the linked objective.
- **Random:** Generate a random number of questions from the linked objective.
- **Some:** Generate specifically selected questions from the linked objective.

Objective: Click  to search for and select an objective.

Questions: If there are questions associated with the objective that you selected, they appear in this box.

Create an exam

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Exams**.

The **Exams page** (page 204) opens.

3. Click **Add**.

The **Exam Properties page** (page 205) opens.

4. Type a name for the exam.
5. Type a reference for the exam to make it easier to find in searches.
6. Type a description of the exam.
7. If the exam requires certification, select a certification type.
8. Assign categories if appropriate.
9. Select a type.
10. Click in the check boxes if:
 - The exam is being proctored (turned on)
 - Questions should be randomized each time the test is generated (if unchecked, the questions will be presented in the order of the objectives assigned to the exam properties)
 - The question choices should be randomized for each question
11. Under Exam Rules, click **Add**.

On the **Exam Rule Properties page** (page 206), define the rule and click **Add**.

12. Click **Add**.

Surveys

Most courses include an end-of-course survey that asks students to rate various aspects of the training experience. Surveys are delivered to a student as part of a tree menu item within a Content Object. The following question types can be used in surveys:

- Rating
- Multiple Choice
- Multiple Response
- Check box (Yes/No)
- Date
- Short Answer
- Long Answer
- Increased size (width and height) or Long Answer text entry box

Surveys page

Search

Clear

Search

Add

Title

Description

Surveys

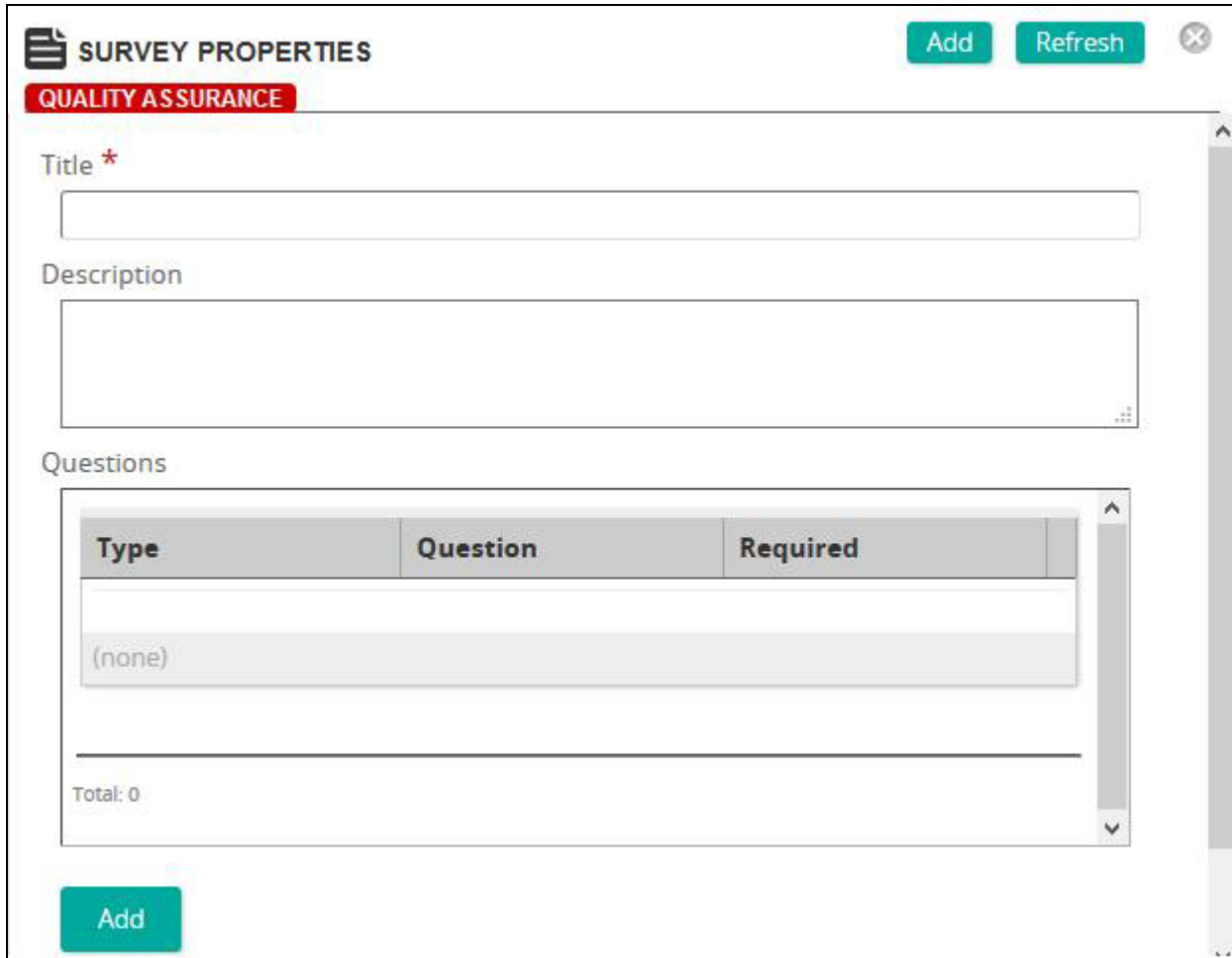
Title	Description	Total Questions	
APHL Survey	APHL Survey	7	
Dawns Survey		3	
eLearning Course Evaluation	Please help us to improve this course by answering a few questions:	6	
Test Survey	This is a test	7	

Total: 4

On the Surveys page, you can search for and view existing surveys. You can also:

- Add (create) a survey
- View the properties for a survey
- Copy a survey
- Delete a survey

Survey Properties page



The screenshot shows the 'SURVEY PROPERTIES' page. At the top right are 'Add' and 'Refresh' buttons. Below the title bar is a red 'QUALITY ASSURANCE' banner. The form includes a 'Title *' field, a 'Description' field, and a 'Questions' section. The 'Questions' section contains a table with columns 'Type', 'Question', and 'Required'. The table is currently empty, showing '(none)' in the 'Type' column. Below the table is a 'Total: 0' label. An 'Add' button is located at the bottom left of the form.

Type	Question	Required
(none)		

Total: 0

On the Survey Properties page, you define the properties for a survey.

Fields

Title: Type a title for the survey.

Description: Type a description for the survey.

Questions: Click **Add** to add questions to the survey. On the Survey Question Properties page, type the question and select the question type.

Links: Click **View Links** to see any associated links to training activities or content objects.

Survey Question Properties page



The screenshot shows the 'SURVEY QUESTION PROPERTIES' window. At the top right are 'Add' and 'Refresh' buttons and a close icon. Below the title bar is a red 'QUALITY ASSURANCE' banner. The main area contains two fields: 'Question *' with a text input box, and 'Type *' with a dropdown menu.

The Survey Question Properties page is where you define a question for a survey and select its type. Based on the type that you select, additional fields appear.

Fields

Question: Type the question.

Required: If the question is required (must be answered), select this check box.

Type: Select one of the following types:

- **Rating** (page 211)
- **Multiple Choice** (page 212)
- **Multiple Response** (page 213)
- **Checkbox (Yes/No)** (page 214)
- **Date** (page 214)
- **Short Answer** (page 215)
- **Long Answer** (page 216)

Rating Type fields


SURVEY QUESTION PROPERTIES
Add
Refresh
✕

QUALITY ASSURANCE

Question *

☐ Required

Type *

Rating ▾

Min Label

Max Label

Start Value

End Value

Fields

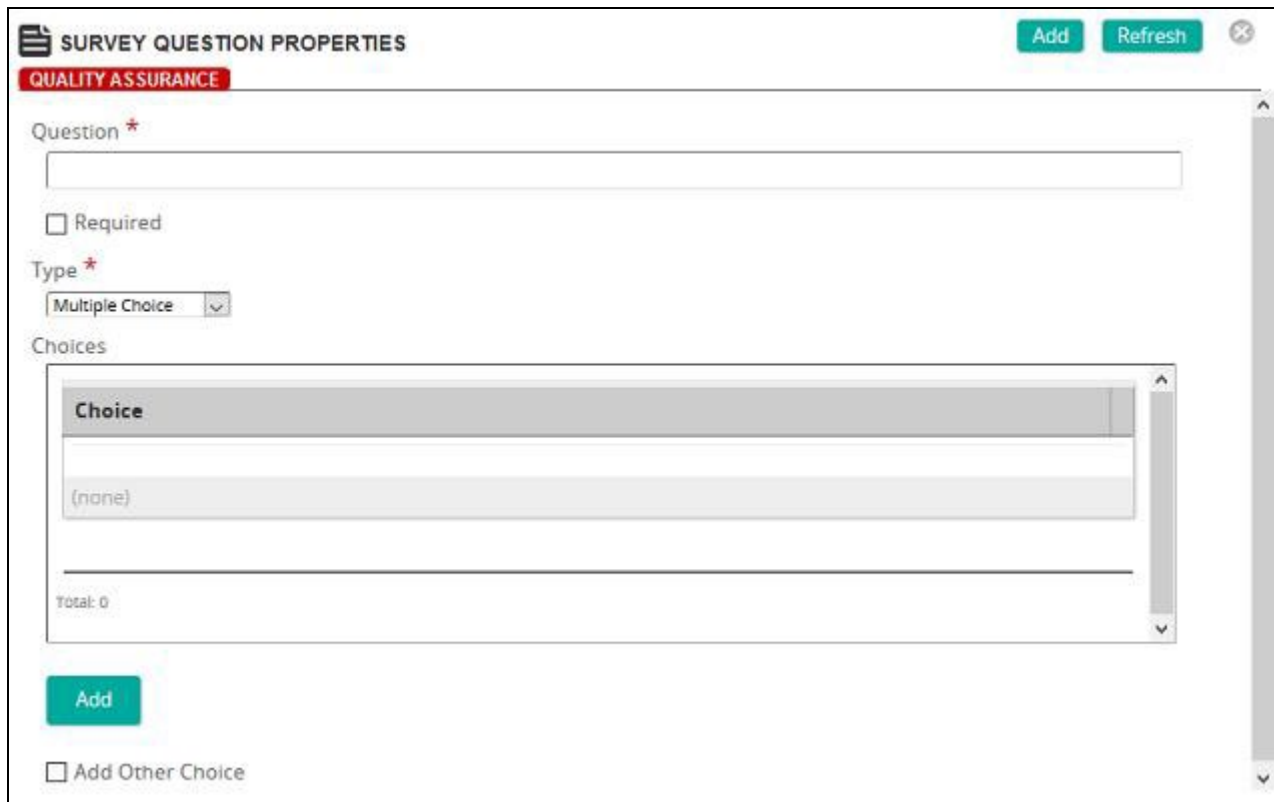
Min Label: Type the label for the minimum or low end of the scale.

Max Label: Type the label for the maximum or high end of the scale.

Start Value: Type the start value for the rating scale.

End Value: Type the end value for the rating scale.

Multiple Choice Type fields



SURVEY QUESTION PROPERTIES [Add] [Refresh] [X]

QUALITY ASSURANCE

Question *

☐ Required

Type *
Multiple Choice

Choices

Choice
(none)

Total: 0

[Add]

☐ Add Other Choice

Fields

Choices: Click **Add** to access the Survey Questions Options Properties page where you can add a choice. Repeat to add more choices.

Add Other Choice: When selected, this check box allows you to add additional choices.

Multiple Response Type fields


SURVEY QUESTION PROPERTIES

Add Refresh

QUALITY ASSURANCE

Question *

☐ Required

Type *

Multiple Response

Choices

Choice

(none)

Total: 0

Add

☐ Add Other Choice

Fields

Choices: Click **Add** to access the Survey Questions Options Properties page where you can add a choice. Repeat to add more choices.

Add Other Choice: When selected, this check box allows you to add additional choices.

Checkbox (Yes/No) Type fields


SURVEY QUESTION PROPERTIES

Add Refresh

QUALITY ASSURANCE

Question *

Type *

Checkbox (Yes/No)

Default

Not Checked

Fields

Default: Select the default state for the question. Select either **Not Checked** or **Checked**.

Date Type fields


SURVEY QUESTION PROPERTIES

Add Refresh

QUALITY ASSURANCE

Question *

☐ Required

Type *

Date

Start Year

End Year

Fields

Start Year: Type the starting year for the date range.

End Year: Type the end year for the date range.

Short Answer Type fields


SURVEY QUESTION PROPERTIES

Add Refresh

QUALITY ASSURANCE

Question *

☐ Required

Type *

Short Answer

Text displayed before user input

Text displayed after user input

Size of input

Maximum characters allowed

Fields

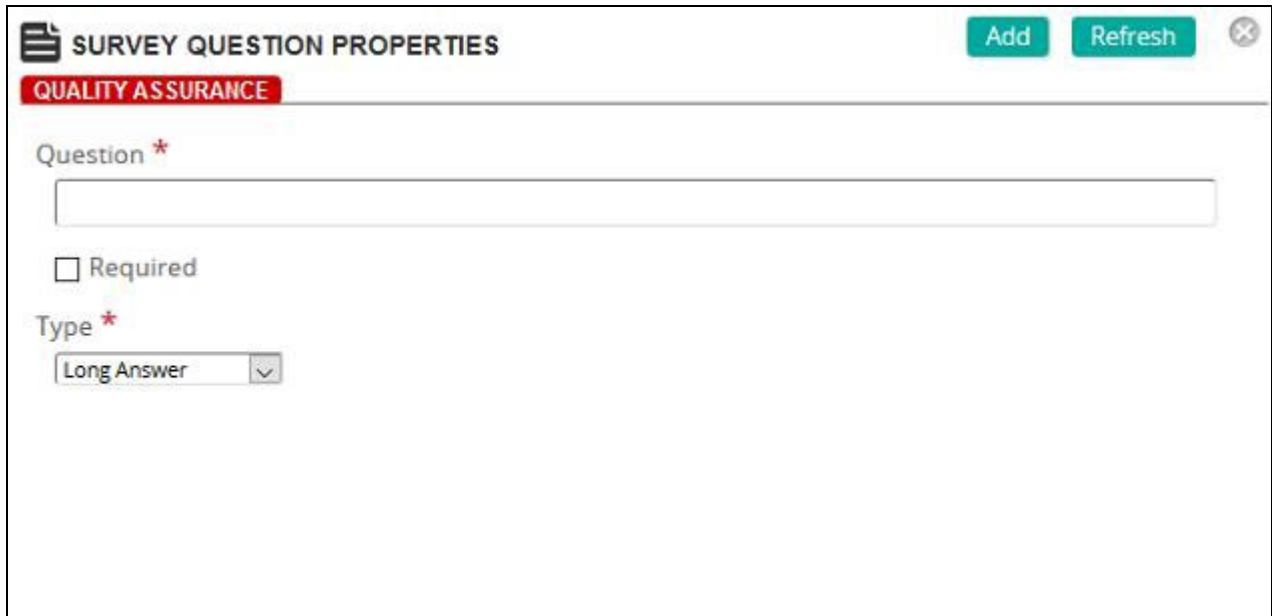
Text displayed before user input: Type the text to display before the user input box.

Text display after user input: Type the text to display after the user input box.

Size of input: Type the number of characters of input per line (width of input area).

Maximum characters allowed: Type the maximum number of characters acceptable.

Long Answer Type fields



SURVEY QUESTION PROPERTIES Add Refresh

QUALITY ASSURANCE

Question *

☐ Required

Type *

Long Answer

No additional fields when question is Long Answer type.

Create a survey

1. From the navigation bar, click **Content**.
 2. Under Authoring, click **Surveys**.
- The **Surveys page** (page 208) opens.
3. Click **Add**.
- The **Survey Properties page** (page 209) opens.
4. Enter a title for the survey
 5. Enter a description for the survey.
 6. From the Questions box, click **Add** to add questions to the survey.

The **Survey Question Properties page** (page 210) opens.

7. Add questions to the survey. Do any of the following:
 - **Add a rating question** (page 217)
 - **Add a multiple choice question** (page 217)
 - **Add a multiple response question** (page 217)
 - **Add a checkbox question** (page 217)
 - **Add a date question** (page 217)
 - **Add a short answer question** (page 218)
 - **Add a long answer question** (page 218)
8. Repeat step 6 until done.

9. On the Survey Properties page, click **Add**.

Add a rating question to a survey

1. On the **Survey Question Properties page** (page 210), in the Question box, type the question.
2. Select the **Required** check box if the question is required.
3. In the Type drop-down list, select **Rating**.

The **rating type fields** (page 211) appear.

4. Complete the fields.
5. Click **Add**.

Add a multiple choice question to a survey

1. On the **Survey Question Properties page** (page 210), in the Question box, type the question.
2. Select the **Required** check box if the question is required.
3. In the Type drop-down list, select **Multiple Choice**.

The **multiple choice fields** (page 212) appear.

4. Complete the fields.
5. Click **Add**.

Add a multiple response question to a survey

1. On the **Survey Question Properties page** (page 210), in the Question box, type the question.
2. Select the **Required** check box if the question is required.
3. In the Type drop-down list, select **Multiple Response**.

The **multiple response fields** (page 213) appear.

4. Complete the fields.
5. Click **Add**.

Add a checkbox question to a survey

1. On the **Survey Question Properties page** (page 210), in the Question box, type the question.
2. Select the **Required** check box if the question is required.
3. In the Type drop-down list, select **Checkbox (Yes/No)**.

The **checkbox (yes/no) fields** (page 214) appear.

4. Complete the fields.
5. Click **Add**.

Add a date type question to a survey

1. On the **Survey Question Properties page** (page 210), in the Question box, type the question.
2. Select the **Required** check box if the question is required.
3. In the Type drop-down list, select **Date**.

The **date fields** (page 214) appear.

4. Complete the fields.
5. Click **Add**.

Add a short answer question to a survey

1. On the **Survey Question Properties page** (page 210), in the Question box, type the question.
2. Select the **Required** check box if the question is required.
3. In the Type drop-down list, select **Short Answer**.

The **short answer fields** (page 215) appear.

4. Complete the fields.
5. Click **Add**.

Add a long answer question to a survey

1. On the **Survey Question Properties page** (page 210), in the Question box, type the question.
2. Select the **Required** check box if the question is required.
3. In the Type drop-down list, select **Long Answer**.

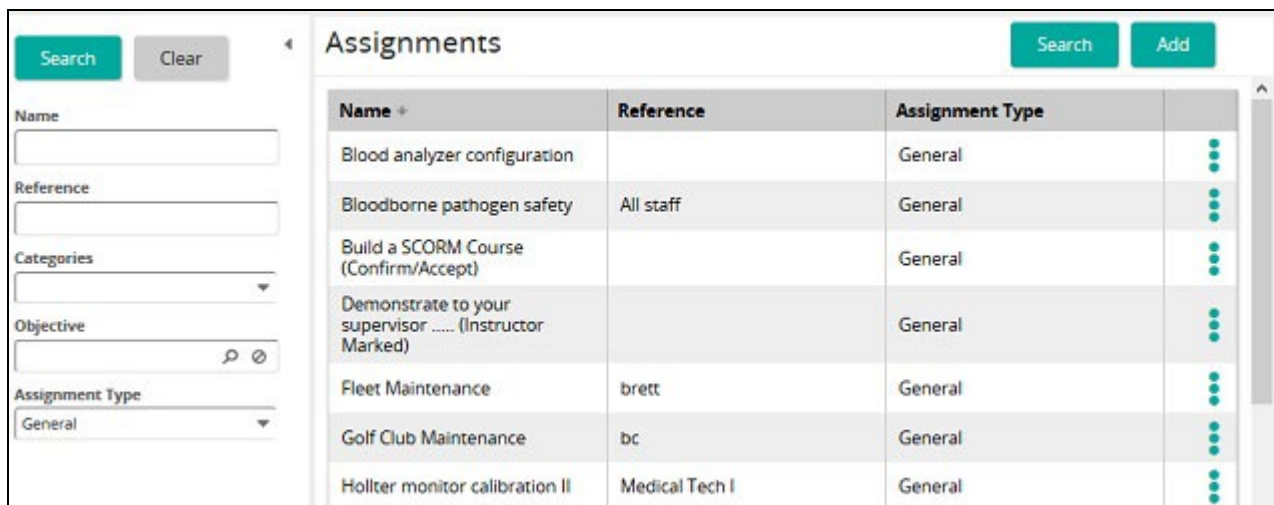
The **long answer fields** (page 216) appear.

4. Complete the fields.
5. Click **Add**.

Assignments

Assignments represent any instructional item considered to be an offline activity that a student must complete. Assessment of assignments can be self-marked or completed by an administrator. Assignments are delivered to a student as part of a tree menu activity in a content object.

Assignments page



The screenshot shows the 'Assignments' page. On the left is a sidebar with filters: Name (text input), Reference (text input), Categories (dropdown), Objective (text input with icons), and Assignment Type (dropdown set to 'General'). At the top of the main area is a 'Search' button and a 'Clear' button. Below this is a table with the following data:

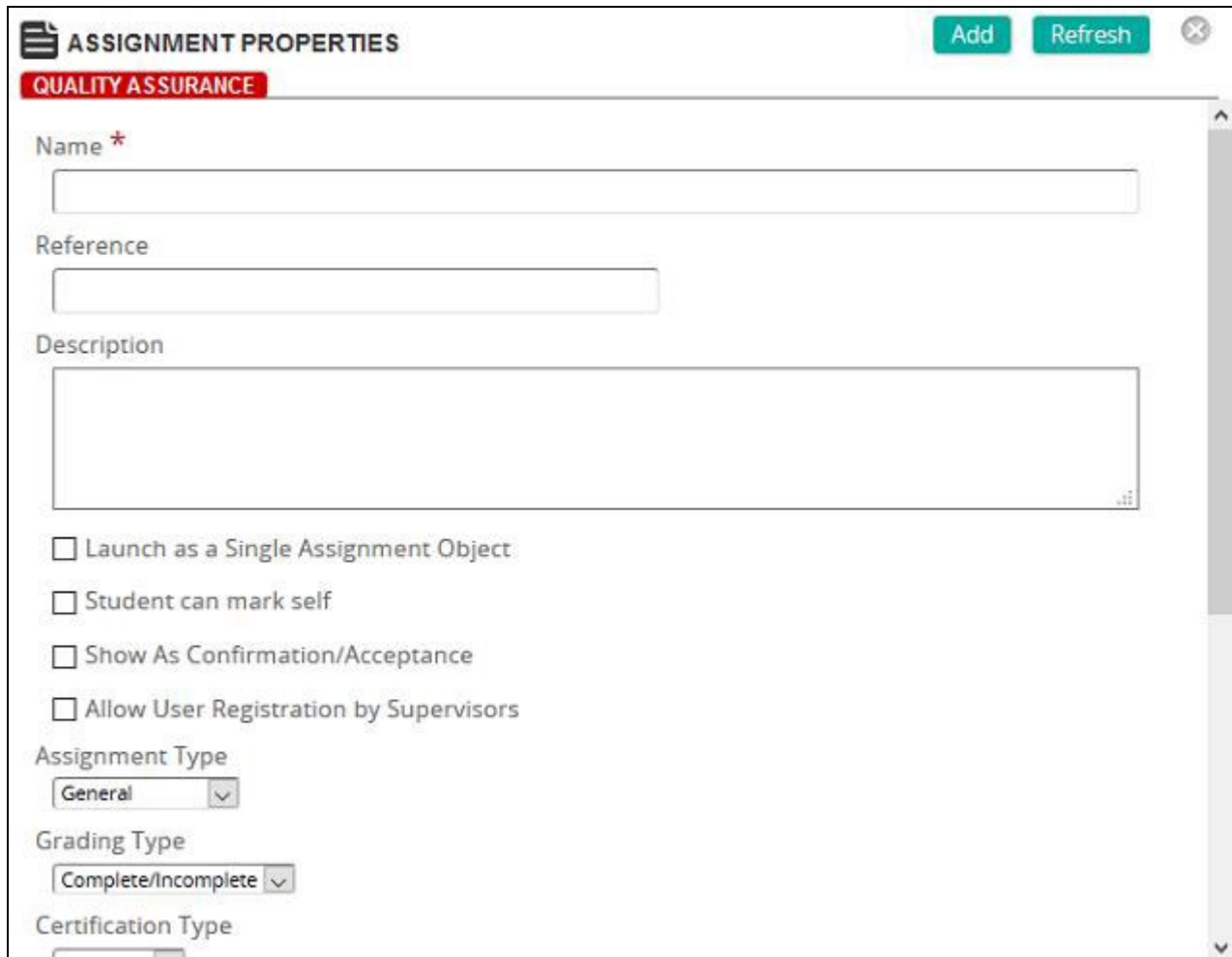
Name +	Reference	Assignment Type	
Blood analyzer configuration		General	⋮
Bloodborne pathogen safety	All staff	General	⋮
Build a SCORM Course (Confirm/Accept)		General	⋮
Demonstrate to your supervisor (Instructor Marked)		General	⋮
Fleet Maintenance	brett	General	⋮
Golf Club Maintenance	bc	General	⋮
Holter monitor calibration II	Medical Tech I	General	⋮

On the Assignments page, you can search for and view assignments. You can also:

- Add an assignment
- View the properties for an assignment

- Delete an assignment

Assignment Properties page



The screenshot shows the 'ASSIGNMENT PROPERTIES' window. At the top right are 'Add' and 'Refresh' buttons. Below the title bar is a red 'QUALITY ASSURANCE' banner. The form contains the following fields:

- Name ***: A text input field.
- Reference**: A text input field.
- Description**: A large text area.
- Launch as a Single Assignment Object**: A checkbox.
- Student can mark self**: A checkbox.
- Show As Confirmation/Acceptance**: A checkbox.
- Allow User Registration by Supervisors**: A checkbox.
- Assignment Type**: A dropdown menu with 'General' selected.
- Grading Type**: A dropdown menu with 'Complete/Incomplete' selected.
- Certification Type**: A dropdown menu (partially visible).

The Assignments Properties page contains the details about a particular assignment. You access this page when you are creating an assignment or changing the properties of an existing one.

Fields

Name: Enter a name for the assignment.

Reference: Enter a reference to help identify the assignment when searching.

Description: Enter a text description for the assignment.

Launch as a Single Assignment Object: Select this check box if you want users to launch an assignment directly from their Training page as if it were an online training course.

Student can mark self: Select this check box to allow the student to self-mark the assignment.

Show as Confirmation/Acceptance: Select this check box to activate a confirmation to the student.

Allow User Registration by Supervisors: Select this check box to control what assignments are exposed to the Supervisor Registration function.

Assignment Type: Select one of these options:

- **General:** Assignments created in the Administration portal that are reused for multiple users.
- **Ad Hoc:** Assignments created by a supervisor and assigned specifically to a single user in the Supervisor portal.
- **Student Ad Hoc:** Assignments created by students.

Grading Type: Select a grading type. Typical options include:

- Complete/Incomplete
- Checklist
- Percentage

Checklist (only if Grading Type is Checklist): Click  to search for and select a checklist to associate with the assignment.

Checklist Assessed by (only if Grading Type is Checklist): Select who can see the assignment and assess/grade this checklist in the Student Portal. Options include:

- **All Experts:** Any user who has the Expert user role assigned can see the assignment and assess/grade the checklist.
- **Membership:** You can restrict which expert users can see the assignment and assess/grade this checklist by using membership groups. In the Checklist Expert Membership box, select the membership groups that can see the assignment and assess the checklist.
- **Certification Type:** Select a default certification type to define the certification and recertification time periods to meet a qualification condition.

Objective: Select  to select an objective to associate with the assignment.

Categories: In the Available list, select one or more categories and then click the left arrow to move them to the Assigned list.

Links: Click **View Links** to see any associated links to content, competencies, or prerequisites.

Creation Date: A display-only field that shows the date the assignment was created.

Creation By: A display-only field that shows the user who created the assignment.

Add an assignment

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Assignments**.

The **Assignment page** (page 218) opens.

3. Click **Add**.

The **Assignment Properties page** (page 219) opens.

4. Complete the fields as appropriate.
5. Click **Add**.

Author an assignment

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Assignments**.

The **Assignments page** (page 218) opens.

3. Click **Search** to display the assignments available in Rival Learn.
4. In the list for the assignment you want to author, click **⋮** and then click **Author**.
5. In the **HTML Editor** (on page 61), provide details about the assignment such as steps, goals, what is involved in completing the assignment, and so on.

Tip: The HTML Editor allows you to format, add media, images, videos, and more.

6. Click **Save**.

View an assignment

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Assignments**.

The **Assignment page** (page 218) opens.

3. Leave the filters blank to see all assignments or select filters to limit your search.
4. In the list beside an assignment, click **⋮** and then click **Properties**.

The **Assignment Properties** (page 219) page opens.

Viewing ad hoc assignments or student ad hoc assignments in the Admin Portal

The Assignment tab in the Admin portal supports the following types of assignments:

- General - Assignments created in the Admin portal that are reused for multiple users.
- Ad hoc assignments - Assignments created by a supervisor and assigned specifically to a single user in the Supervisor portal.
- Student ad hoc assignments - Assignments created by students.

By default, the Assessment tab filters for general assignments. However, you can search for other assignment types by setting the Assignment type filter.

Checklists

A checklist contains a list of actions, skills, and behaviors required for a specific task. A checklist serves as a way for a mentor or supervisor to observe and document how an employee handles a specific task. Checklists are often used in organizations that require employees to follow strict protocols, such as in petroleum production, clinical, and pharmaceutical industries.

Checklists can be graded/assessed as a self-marked assignment, administrator marked, or by a designated expert. This is set when a checklist is associated with an assignment on the **Assignment Properties page** (on page 219).

Checklists in Rival Learn are created in the Administration Portal and pushed to students as assignments in the Student Portal.

Reporting and tracking

System history reports are available that track whether checklists are completed or incomplete. Possible scores on the report for checklists include Checklist Incomplete, Pass, or Fail. The reports are:

- SR Student History
- SR Student History (Recent) By Intervention

- SR Student History By Intervention
- SR Student History By Intervention (Basic1)
- SR Student Training History By Group - with Default CEUs
- SR Student Training History with Default CEUs
- SR Student Training Combined
- SR Duplicate Training Records
- SR Training Analysis

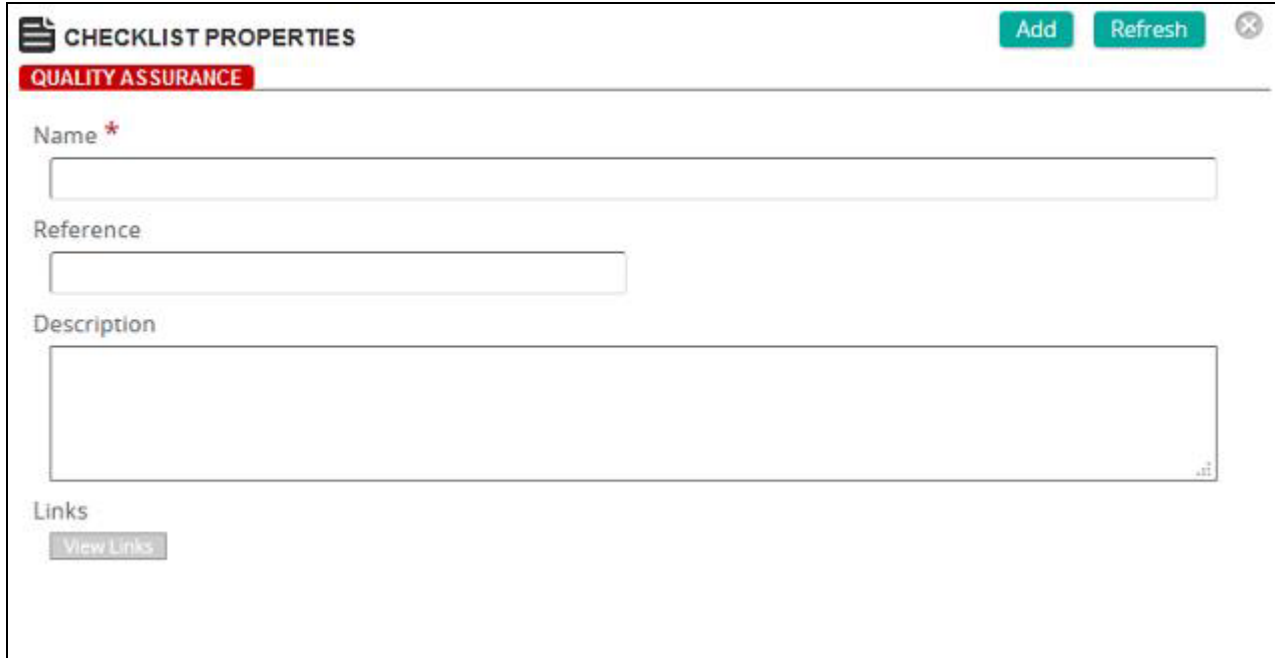
Checklists page

Checklists		Search	Add
Search Clear Clear			
Name			
Reference			
Name +	Reference		
Annual Auto Maintenance	brett		
Blood analyzer configuration	Medical Tech I		
Blood analyzer configuration II	Medical Tech I		
Bloodborne pathogen safety checklist	All staff		
Demo	Chandler		
Engine Maintenance	Auto		
Golf club cleaning	bc		
GreenLight			

The Checklists page shows all the checklists available in Rival Learn. Checklist name, reference number, and description are listed. From this page, you can:

- Add a new checklist
- Create (author) a checklist
- View properties for an existing checklist
- Modify an existing checklist
- Delete a checklist
- Preview a checklist

Checklist Properties page



The screenshot shows the 'CHECKLIST PROPERTIES' window. At the top right are 'Add' and 'Refresh' buttons. Below the title bar is a red tab labeled 'QUALITY ASSURANCE'. The form contains the following fields:

- Name ***: A text input field.
- Reference**: A text input field.
- Description**: A large text area.
- Links**: A section with a 'View Links' button.

On the Checklist Properties page, you provide a name, reference, and description for a checklist. If there are any associated links, you can view them from this page.

Fields

Name: Type a descriptive name for the checklist. This is the name Rival Learn uses to identify the checklist throughout the application.

Reference: Type a reference for this item to make it easier to find in searches.

Description: Type a description for the checklist. A description typically identifies what the checklist measures or its purpose.

Revision: A display-only field that indicates the revision number. The revision number increments when a change is made to the checklist while it is assigned to a student and in progress.

Links: Click **View Links** to view a list of all assignments where the checklist is associated.

Add a checklist

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Checklists**.
The **Checklists page** (page 222) opens.
3. Click **Add**.
The **Checklist Properties page** (page 223) opens.
4. Name the checklist and add a reference and description.
5. Click **Add**.
The checklist appears in the list on the Checklists page.

Copy a checklist

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Checklists**.

The **Checklists page** (page 222) opens.

3. In the list beside a checklist, click  and then click **Copy**.
4. In the New Checklist Name box, type a name for the checklist.
5. Click **Copy**.

Delete a checklist

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Checklists**.

The **Checklists page** (page 222) opens.

3. In the list beside a checklist, click  and then click **Delete**.

Note: You cannot delete a checklist if it is assigned to a student and is in progress. A warning message appears and prevents you from deleting the checklist.

4. At the confirm deletion prompt, click **OK**.

Preview a checklist

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Checklists**.

The **Checklists page** (page 222) opens.

3. In the list beside a checklist, click  and then click **Preview**.

The checklist opens in a preview window.

Print a blank checklist

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Checklists**.

The **Checklists page** (page 222) opens.

3. In the list beside a checklist, click  and then click **Preview**.

The checklist opens in a preview window.

4. Click **Print**.

Creating (authoring) a checklist

Rival Learn uses a WYSIWYG page to make it easy to create a checklist. You provide a name and description for the checklist, and then drag and drop content. As you create a checklist, you can preview it to see how it will look when pushed to students.

Like a paper checklist, a Rival Learn checklist has the following content:

- Title

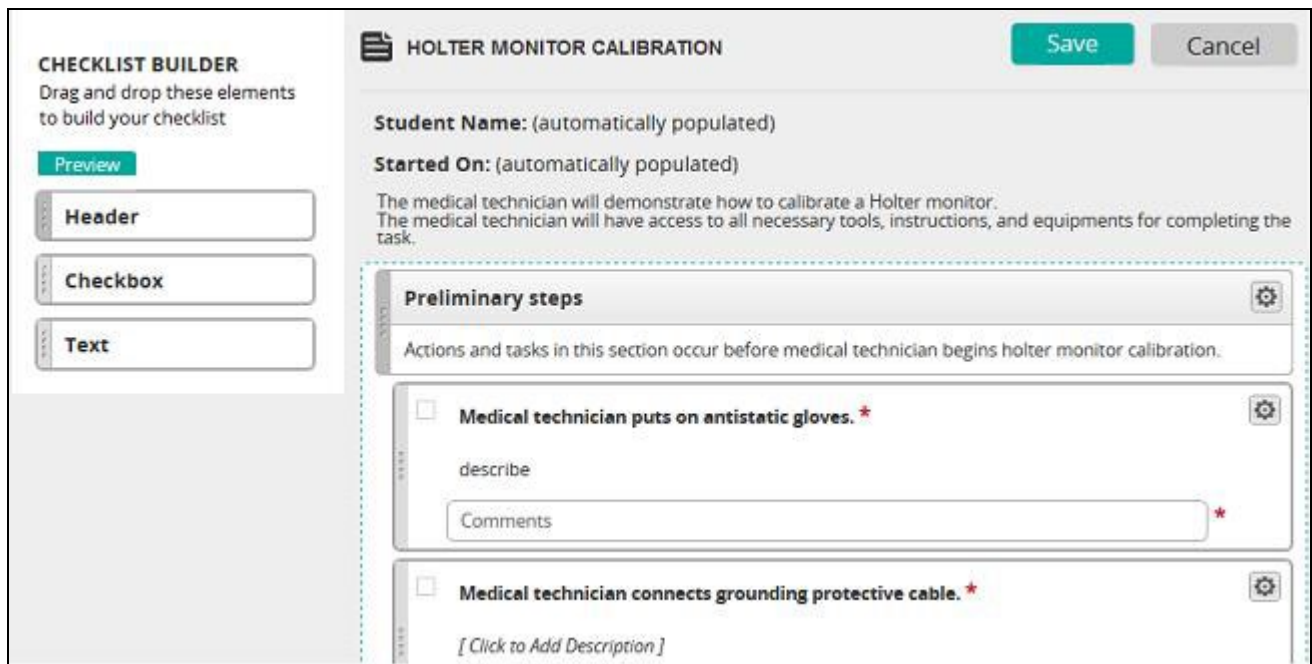
- Description
- Header (including a title and description)
- Elements

A checklist also has system-generated content such as student name, date administered, and marked by. When a checklist is pushed to a student, Rival Learn automatically populates these fields.

Every checklist has a revision number. The version number increments each time an in-progress checklist is modified. An in-progress checklist is a checklist assigned to a student that is not yet completed.

You add a checklist to Rival Learn on the Checklist Properties page and author (add content) on the Checklist Authoring page.

Checklist Authoring page



The screenshot shows the 'CHECKLIST BUILDER' interface for a checklist titled 'HOLTER MONITOR CALIBRATION'. On the left, the 'CHECKLIST BUILDER' panel includes a 'Preview' button and three draggable elements: 'Header', 'Checkbox', and 'Text'. The main content area on the right shows the checklist structure. It starts with a 'Student Name' field (automatically populated) and a 'Started On' field (automatically populated). Below these is a description: 'The medical technician will demonstrate how to calibrate a Holter monitor. The medical technician will have access to all necessary tools, instructions, and equipments for completing the task.' The checklist is organized into sections, with 'Preliminary steps' highlighted. This section contains two items, each with a checkbox, a title, a description field, and a comments field. The first item is 'Medical technician puts on antistatic gloves.' with the description 'describe'. The second item is 'Medical technician connects grounding protective cable.' with a placeholder '[Click to Add Description]'. The interface includes 'Save' and 'Cancel' buttons at the top right.

On the Checklist Authoring page, you select the elements (content) to include on a checklist. This page has two primary sections:

- Checklist Builder panel
- Content panel

Checklist Builder panel

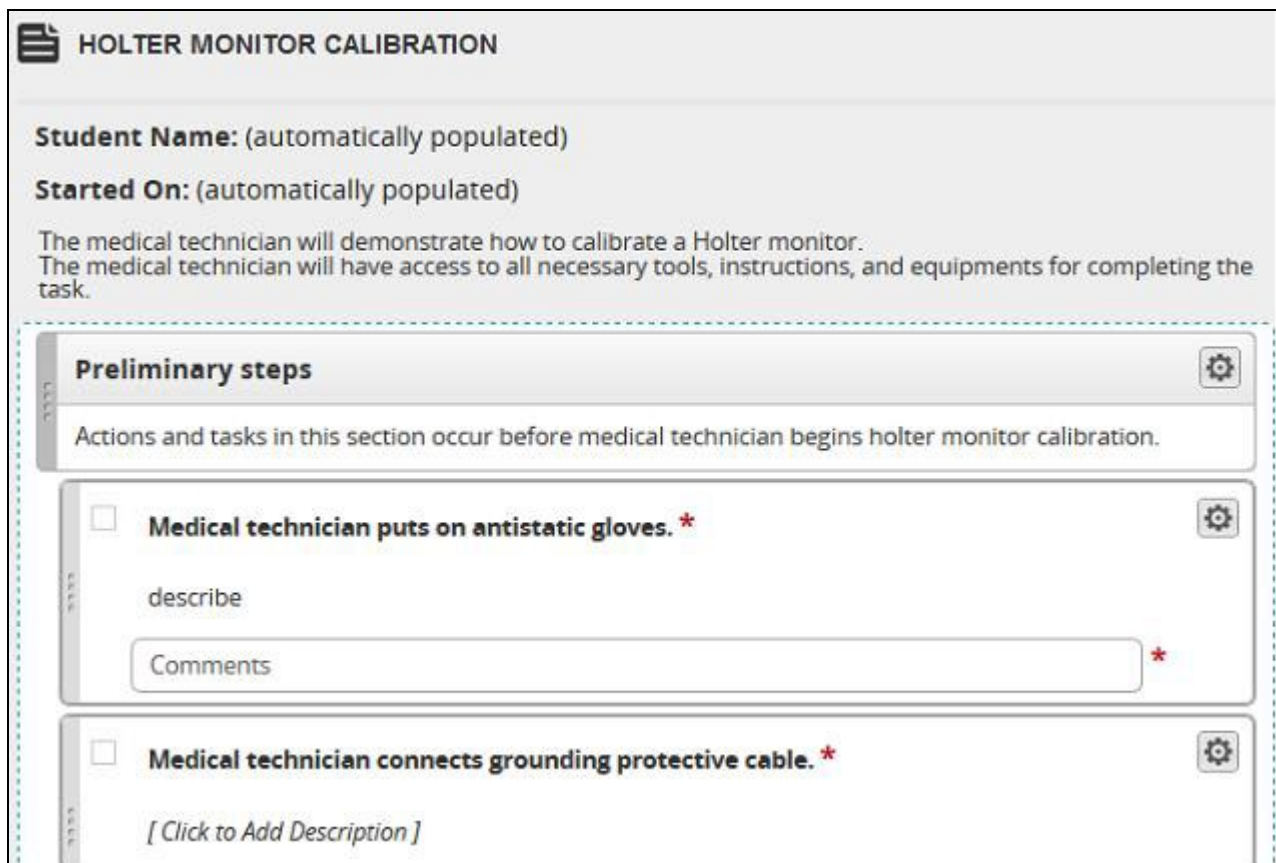
The Checklist Builder (left panel) contains all the elements that can be added to the checklist. The following table shows supported elements.

Element type	Description
Header	Information that precedes check boxes or text in a checklist. A header contains a header title and description.

Checkbox	An element that can be checked when completed. It contains a check box, task title, and a description. It can be set to be required or not. A checkbox element also contains a comments box, which can be hidden. A comment can be set to be required or not.
Text	An element in which you can add text description. It can be set to be required or not. A text element contains a task title and a comments box, which can be hidden. A comment can be set to be required or not.

There is also a Preview button, which shows what the checklist looks like when it is pushed to students.

Content panel



HOLTER MONITOR CALIBRATION

Student Name: (automatically populated)

Started On: (automatically populated)

The medical technician will demonstrate how to calibrate a Holter monitor.
The medical technician will have access to all necessary tools, instructions, and equipments for completing the task.

Preliminary steps [Settings icon]

Actions and tasks in this section occur before medical technician begins holter monitor calibration.

☐ **Medical technician puts on antistatic gloves. *** [Settings icon]

describe

Comments *

☐ **Medical technician connects grounding protective cable. *** [Settings icon]

[Click to Add Description]

The Content panel (right panel) shows checklist content. The checklist title and description appear at the top followed by checklist elements.

Adding and arranging content

You add and arrange content by dragging and dropping elements. Find an element in the Checklist Builder panel, and drag it to the Content panel. After that, add text and make any necessary edits, and then arrange appropriately within the checklist.

Setting element properties (including making elements required)

You can set element properties, including making elements required, by clicking the options icon  and selecting **Edit Properties**.



The image shows a 'Task Properties' dialog box. It has a title bar 'Task Properties' and three checked checkboxes: 'Required', 'Show Comment', and 'Comment Required'. At the bottom is a 'Close' button.

On the Task Properties pop-up, select options:

- **Required:** If this box is checked, an element must be completed before the checklist can be submitted. A required element is denoted by a red asterisk.
- **Show comment:** If this box is checked, comment box for the element appears on the checklist.
- **Comment Required:** If this box is checked, a comment must be entered for the element on the checklist before it can be submitted.

Create (author) a checklist

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Checklists**.

The **Checklists page** (page 222) opens.

3. In the list beside a checklist, click  and then click **Author**.

The **Checklist Authoring page** (page 225) opens.

4. (If applicable) Click the **[Click to Add Instruction Text]** link and then type instructions, requirements, and any other instructional information.
5. In the Checklist Builder panel, click an element and drag it into the dotted area of the Content panel.
6. Click any links on the element and complete.

For example, for a header element, click the **[Click to Add Header Title]** link and type a header. Click the **[Click to Add Description]** link and type a description.

7. (If applicable) To make a checkbox or text element required, click , select **Edit Properties**, select **Required**, and click **Close**.

Tip: Some elements have comment boxes. To make a comment box required, click , select **Edit Properties**, select **Required**, and click **Close**.

You can also hide a comment box. To hide a comment box, click , select **Edit Properties**, uncheck **Show Comment**, and click **Close**.

8. Repeat steps 4 through 6 as needed.
9. Move elements up or down (drag and drop) in the Content panel to arrange appropriately.

Tip: To delete an element, click  and select **Delete Task**.

10. When you are satisfied with the content and how it is organized, click **Save**.

Change checklist content

1. From the navigation bar, click **Content**.
2. Under Authoring, click **Checklists**.

The **Checklists page** (page 222) opens.

3. In the list beside a checklist, click  and then click **Author**.

If the checklist is already assigned to a student and is in progress, a message alerts you that saving modifications will increment the revision number. The changes do not affect existing, in-progress checklist records. Click **Continue**.

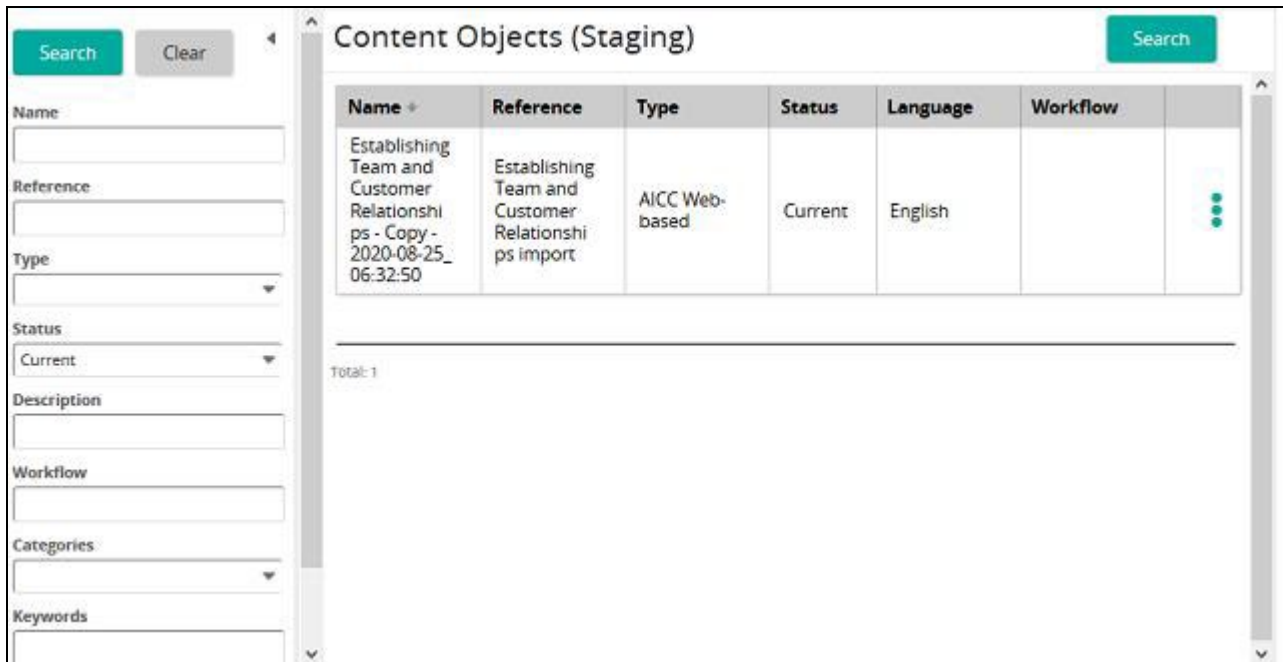
The **Checklist Authoring page** (page 225) opens.

4. Change the content as appropriate.
5. When satisfied with content changes that you made, click **Save**.

Staging

The purpose of Staging is for reviewing content objects for review purposes and not to allow users to edit objects.

Content Objects (Staging) page



Name

Reference

Type

Status

Description

Workflow

Categories

Keywords

Content Objects (Staging)

Name	Reference	Type	Status	Language	Workflow	
Establishing Team and Customer Relationships - Copy - 2020-08-25_06:32:50	Establishing Team and Customer Relationships import	AICC Web-based	Current	English		

Total: 1

On the Content Objects (Development) page, you can search for and view content objects in the staging stage.

Review a content object in staging stage

1. From the navigation bar, click **Content**.
2. Under Staging, click **Content Objects**.

The **Content Objects (Staging)** page (page 228) opens.

3. Search for the content object.
4. In the list beside the content object, click  and then click **Properties**.

The Content Object Properties page opens.

5. Review the content.
6. Click **Close**.

Library

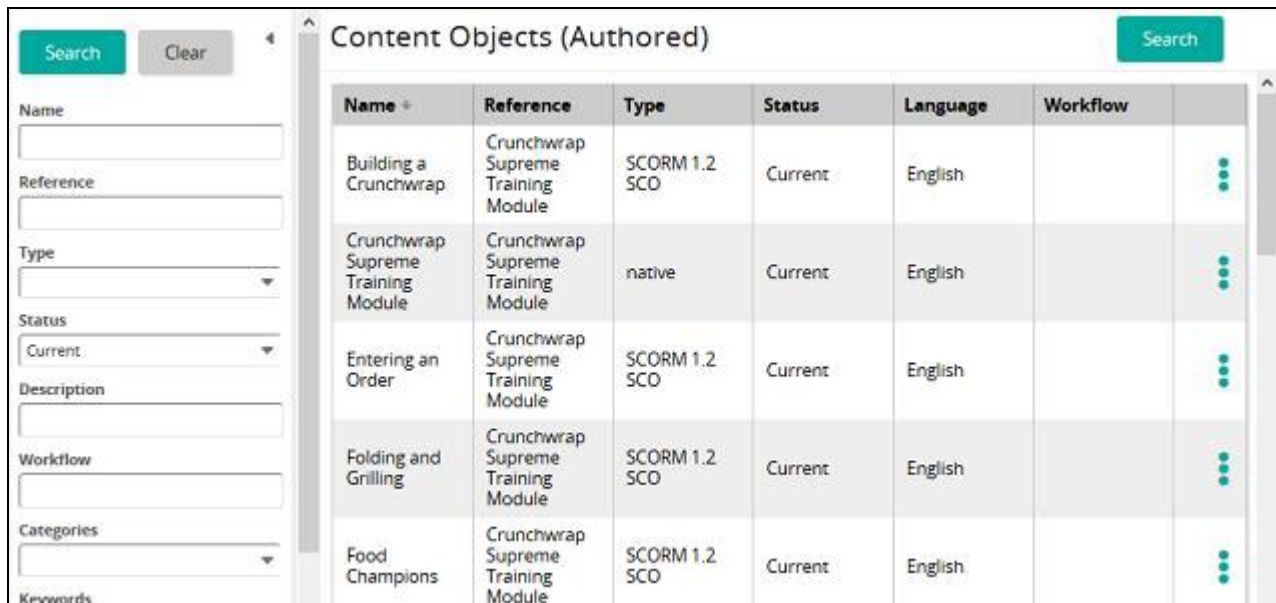
Library contains all approved content objects ready to be used or re-used.

Content Library

The Content Library contains Content Objects that are either *waiting for approval* or have been *approved* for use in Publishing. Items in the Library can have their Properties modified, be previewed through the Student Home Page, be duplicated, and be deleted.

A Content Object must be returned to Development to edit its contents. Only an item that has been Approved can be used to Publish an eCourse.

Content Objects (Authored) page



Name	Reference	Type	Status	Language	Workflow	
Building a Crunchwrap	Crunchwrap Supreme Training Module	SCORM 1.2 SCO	Current	English		
Crunchwrap Supreme Training Module	Crunchwrap Supreme Training Module	native	Current	English		
Entering an Order	Crunchwrap Supreme Training Module	SCORM 1.2 SCO	Current	English		
Folding and Grilling	Crunchwrap Supreme Training Module	SCORM 1.2 SCO	Current	English		
Food Champions	Crunchwrap Supreme Training Module	SCORM 1.2 SCO	Current	English		

On the Content Objects (Authored) page, you can view the content objects in the Content Library.

View the Content Objects in the Content Library

1. From the navigation bar, click **Content**.
2. Under Library, click **Content Library**.

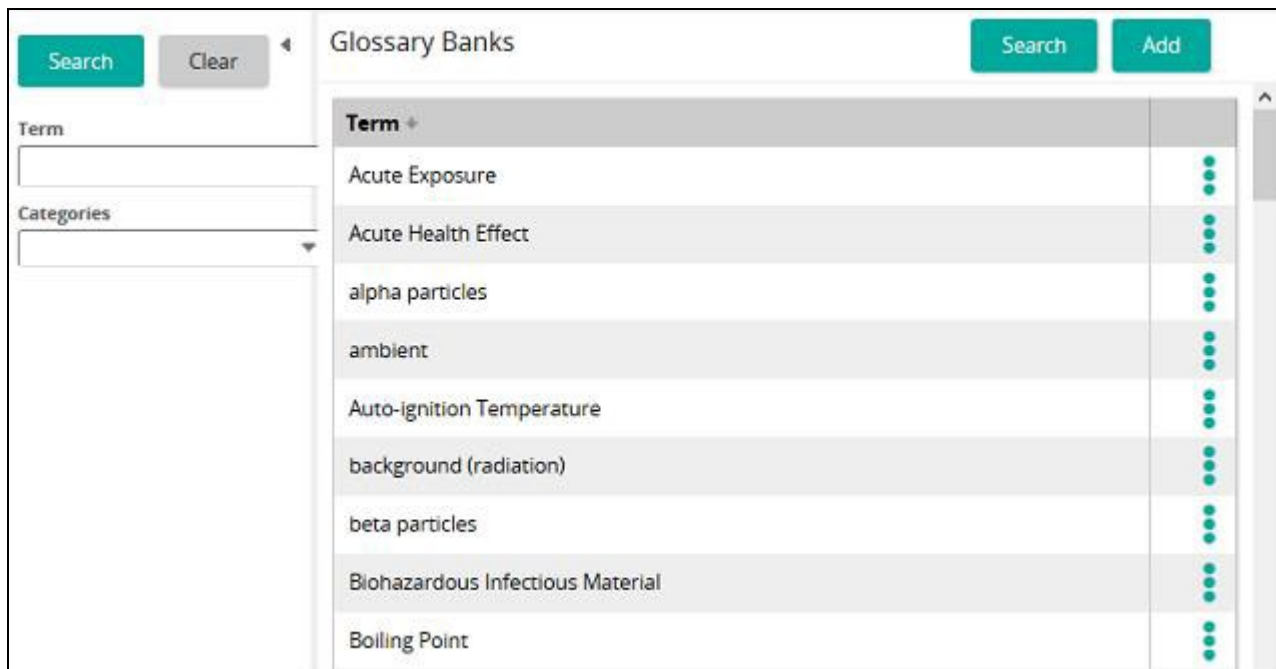
The **Content Objects (Authored) page** (page 229) opens.

3. Click **Search** or filter the search by typing additional information into the filter boxes. A list of content objects displays.
4. From each object, the following options are available: Properties, Preview, Copy, and Delete.

Glossary Bank

Administrators can create and store a list of terms in the Glossary Bank. These terms are assigned to individual Content Objects via the Content Objects Properties icon. As an eCourse is created, all terms associated with the Content Objects within it are combined and made available through the Glossary tab of the Student Console Viewer.

Glossary Banks page



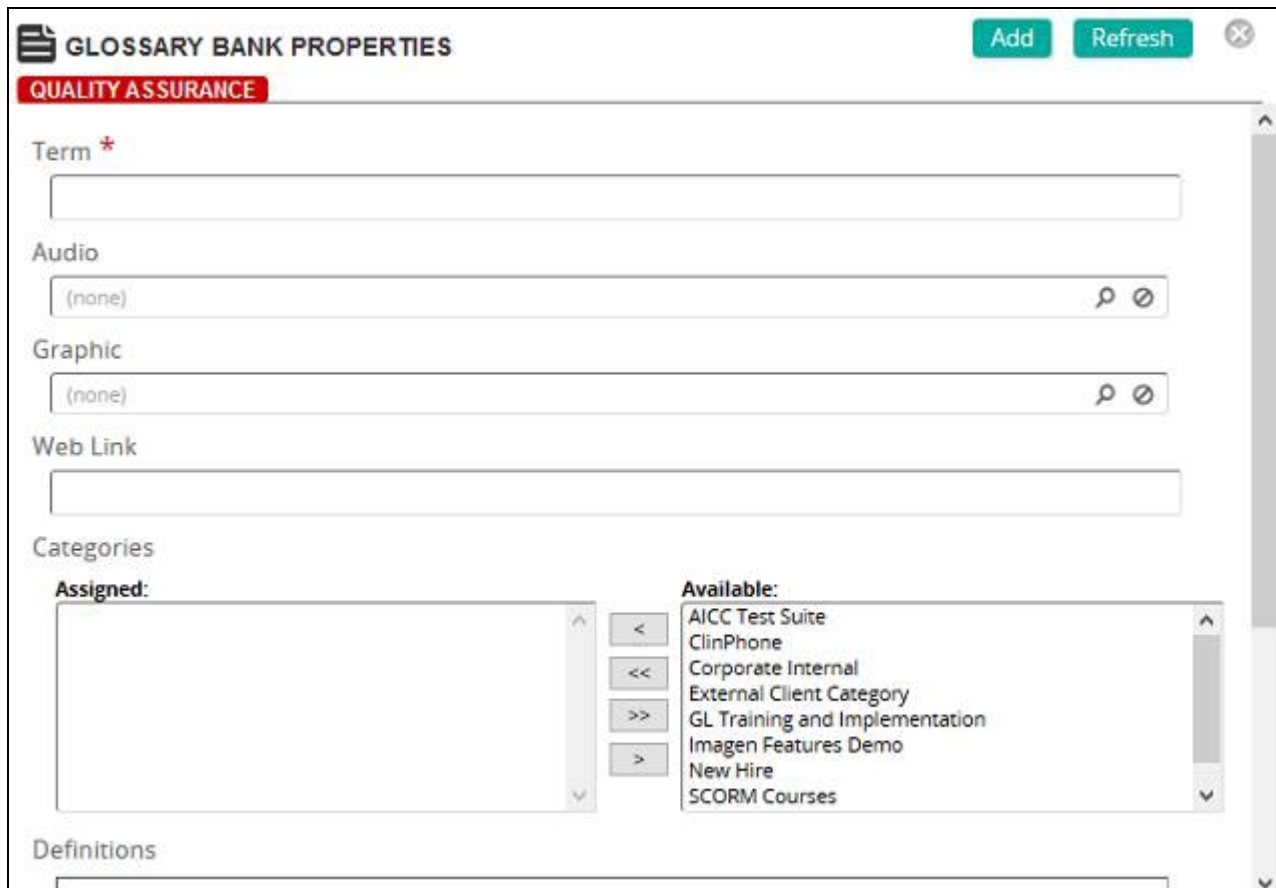
The screenshot shows the 'Glossary Banks' page. On the left, there is a search filter section with a 'Search' button, a 'Clear' button, and input fields for 'Term' and 'Categories'. The main area displays a table of glossary terms. Each row includes the term name and a vertical ellipsis icon for actions.

Term	
Acute Exposure	⋮
Acute Health Effect	⋮
alpha particles	⋮
ambient	⋮
Auto-ignition Temperature	⋮
background (radiation)	⋮
beta particles	⋮
Biohazardous Infectious Material	⋮
Boiling Point	⋮

On the Glossary Banks page, an administrator can search for and view existing glossary terms. An administrator can also:

- Add a glossary term to the Glossary Bank
- View the properties for a glossary term
- Delete a glossary term

Glossary Bank Properties page



On the Glossary Bank Properties page, an administrator adds a glossary term and defines its properties.

Fields

Term: Type the name of the glossary.

Audio: Audio allows a glossary term to have sound as part of the definition. To add audio, click  to search for and select an audio file from the Media/Asset Bank.

Graphic: To add a graphic as part of the definition, click  to search for and select an audio file from the Media/Asset Bank.

Web Link: To include a web link as part of the definition, type a web link.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Definitions: The definition of the glossary term appears here. To add a definition, click **Add Entry** and then type the definition. You can add multiple definitions by clicking the plus icon. Use the up and down icons to order the definitions. To delete a specific definition, click the trash icon. To delete all definitions for the glossary term, click **Remove Entry**.

Add a glossary term to the Glossary Bank

1. From the navigation bar, click **Content**.
2. Under Library, click **Glossary Bank**.

The **Glossary Banks page** (page 230) opens.

3. Click **Add**.

The **Glossary Bank Properties page** (page 231) opens.

4. In the **Term** text box, type the glossary term.
5. (Optional) Add audio, graphic, and web links.
6. (If applicable) From Categories, under Available, select one or more categories, then click the left arrow to move them under Assigned.
7. From Definitions, click **Add Entry** then type a definition for the term.

Tip: Click **Add Entry** or **Add Definition** to add additional definitions. Use the up or down arrows to set the order of each definition.

8. Click **Add**.

Question Bank

Exams are built in the Authoring section of Rival Learn using questions created and stored in the Question Bank. In Rival Learn, questions must be assigned to enabling objectives for student assessment purposes.

Questions page

Search

Clear

Stem

Source

Reference ID

Question Template

Type

Category

Objective

Questions

Search

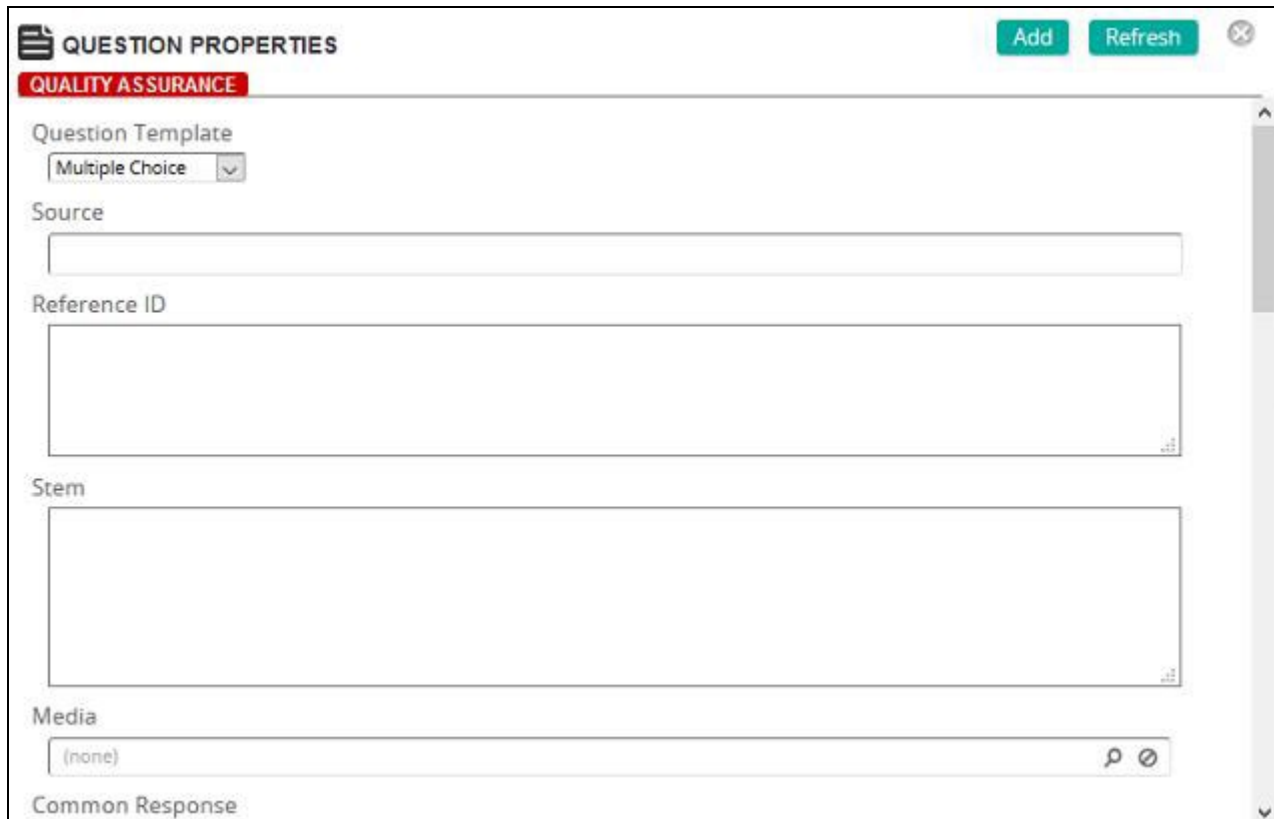
Add

Reference ID	Stem	Objective	Order	Type	Question Template	
	The Automatic Flight Control System communicates with other aircraft computers and electronic components through the:	22_IAPS		Exam	Multiple Choice	
	Where are the flight director modes displayed?	22_Flight Director		Exam	Multiple Choice	

On the Questions page, an administrator can search for and view existing questions. An administrator can also:

- Add a question to the Questions Bank
- View the properties for a question
- Copy a question
- Delete a question from the Questions Bank

Question Properties page



The screenshot shows the 'QUESTION PROPERTIES' dialog box. At the top right are 'Add' and 'Refresh' buttons. Below the title bar is a red 'QUALITY ASSURANCE' banner. The form contains the following fields:

- Question Template:** A dropdown menu currently showing 'Multiple Choice'.
- Source:** A text input field.
- Reference ID:** A large text input area.
- Stem:** A large text input area.
- Media:** A text input field showing '(none)' with search and delete icons.
- Common Response:** A partially visible text input field at the bottom.

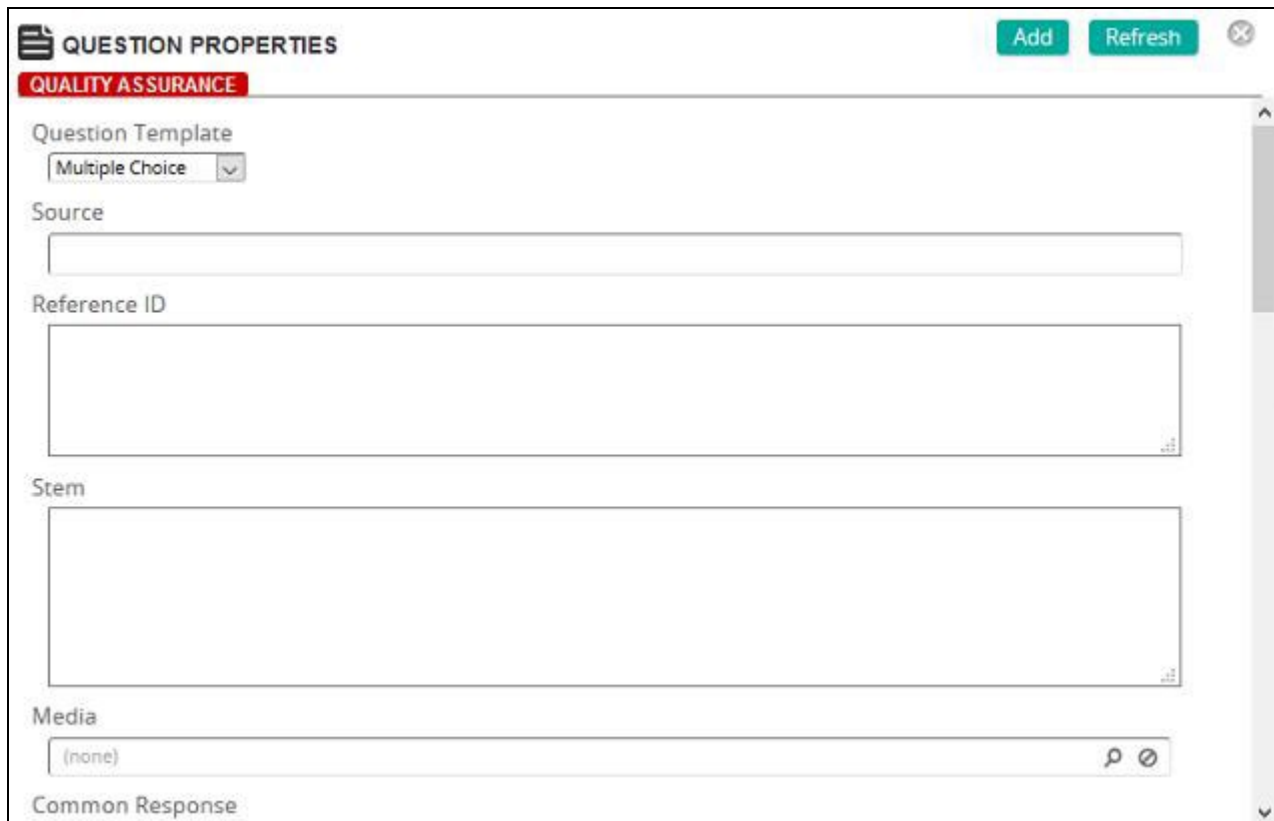
On the Questions Properties page, an administrator defines the question. The fields on the page vary based on the question template that is selected.

Fields

Question Template: Select one of the following options:

- **Multiple Choice** (page 234)
- **Multiple Response** (page 234)
- **Matching** (page 235)
- **Fill in the Blank** (page 236)

Multiple Choice/Multiple Response template



Use this template to create true/false or single correct multiple choice questions or questions where more than one response must be selected to be correct.

Fields

Source: Type the source information for the question.

Reference ID: Type the reference information for the question.

Stem: Type a question stem. This will appear above the answer choices in the student view. **Media:** Click  to search for and select a media file from the Media/Asset Bank.

Common Response: Type a common response. This appears after each choice feedback in the student view. Use common response when you want to provide common feedback for all choices in the question as reinforcing feedback. Only used for self-check type questions.

Order: Type an order value. Exams with random question order turned off use the order number to arrange questions in the exam from small to large order number. Exams with random question order turned on ignore the order number.

Weight: Type the weight value. The weight is used to set the score for the question. Weight is used to increase the value of a question when used in an exam.

Type: Select the check box of either or both of the question types. Self Check questions display feedback to users. Exam questions do not display feedback and are used in scored exams.

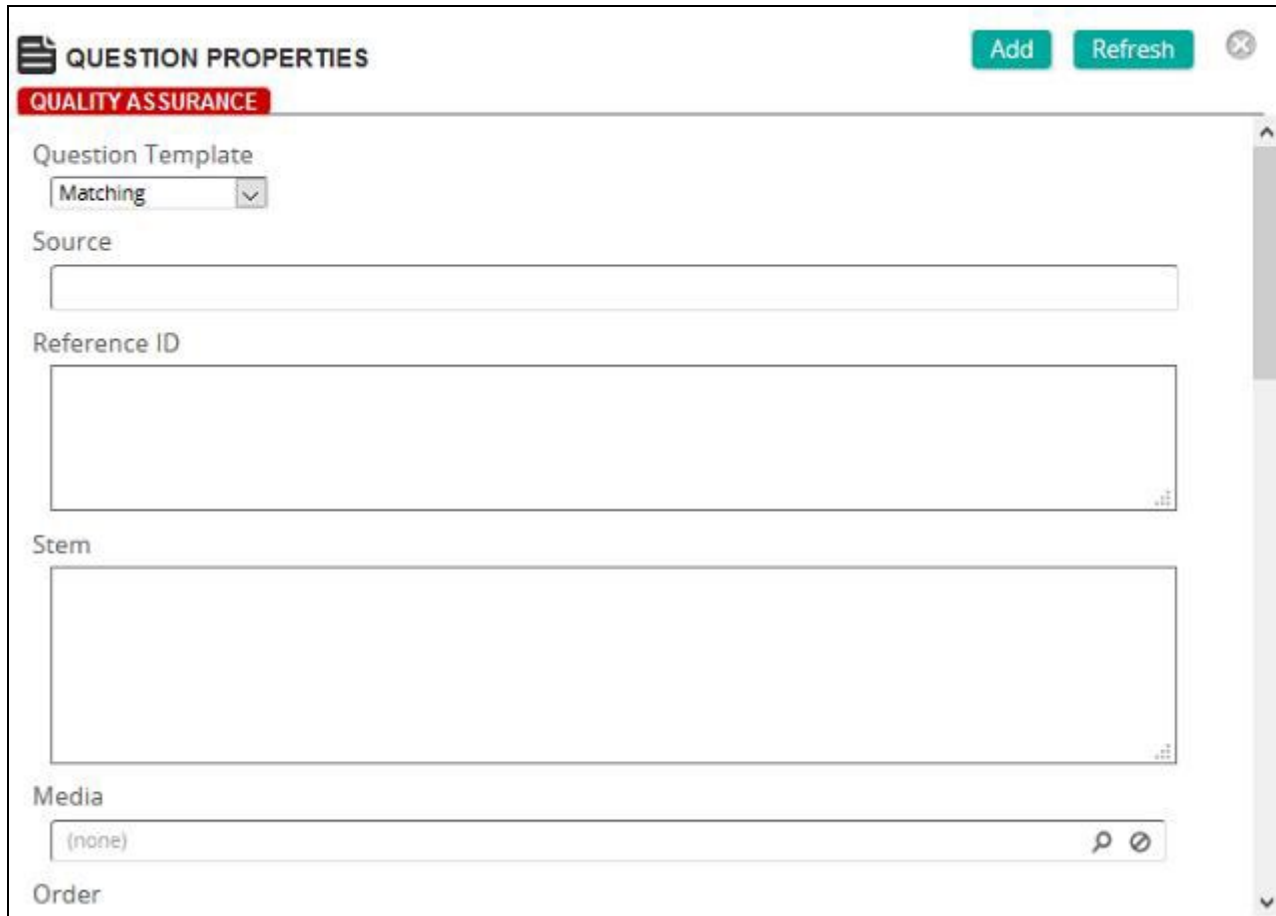
Objective: Click  to search for and select an objective to link to the question.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Force Choice Order (cannot be randomized by Exam): Select this check box to display the choice order in the order set within the question.

Text boxes: Type the choices.

Matching template



QUESTION PROPERTIES [Add] [Refresh] [Close]

QUALITY ASSURANCE

Question Template
 Matching ▼

Source

Reference ID

Stem

Media
 (none) 🔍 🗑️

Order

Use this template to create questions where users must match one column of items to a single correct match in a second column or where users must select the correct sequence from a list of items.

Fields

Source: Type the source information for the question.

Reference ID: Type the reference information for the question.

Stem: Type a question stem. This will appear above the answer choices in the student view.

Media: Click 🔍 to search for and select a media file from the Media/Asset Bank.

Order: Type an order value. Exams with random question order turned off use the order number to arrange questions in the exam from small to large order number. Exams with random question order turned on ignore the order number.

Weight: Type the weight value. The weight is used to set the score for the question. Weight is used to increase the value of a question when used in an exam.

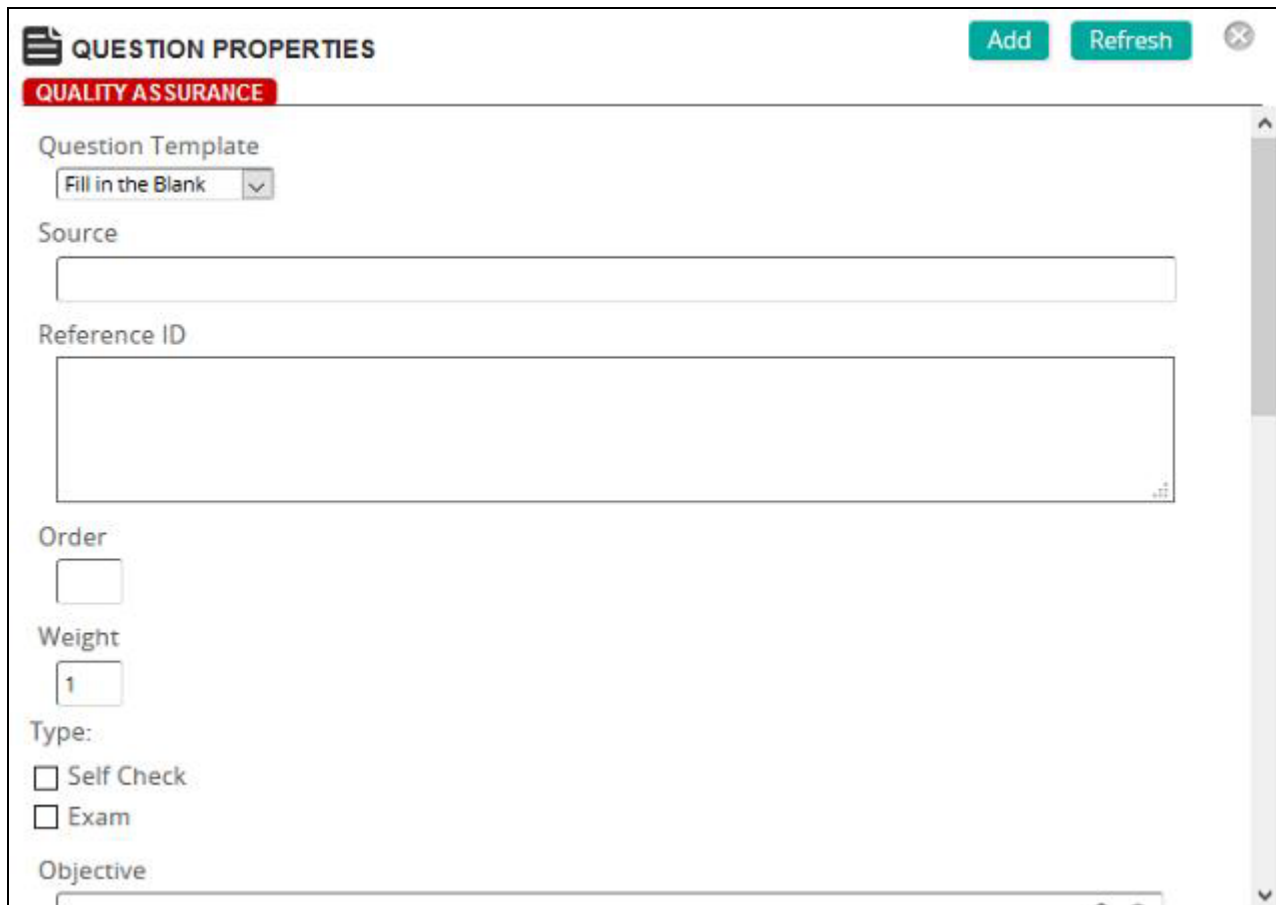
Type: Select the check box of either or both of the question types. Self Check questions display feedback to users. Exam questions do not display feedback and are used in scored exams.

Objective: Click  to search for and select an objective to link to the question.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Add Pair: Click this button to add a matching pair. Matching items are entered in pairs, one item for column A and one item for column B.

Fill in the Blank template



The screenshot shows the 'QUESTION PROPERTIES' dialog box with the 'QUALITY ASSURANCE' tab selected. The 'Question Template' dropdown is set to 'Fill in the Blank'. Below it are input fields for 'Source' and 'Reference ID'. Further down are fields for 'Order' (empty) and 'Weight' (set to 1). Under the 'Type:' section, both 'Self Check' and 'Exam' checkboxes are present. At the bottom, there is an 'Objective' field with a search icon.

Use this template to create a fill in the blank question where users must type a correct response into one or more blanks.

Fields

Source: Type the source information for the question.

Reference ID: Type the reference information for the question.

Order: Type an order value. Exams with random question order turned off use the order number to arrange questions in the exam from small to large order number. Exams with random question order turned on ignore the order number.

Weight: Type the weight value. The weight is used to set the score for the question. Weight is used to increase the value of a question when used in an exam.

Type: Select the check box of either or both of the question types. Self Check questions display feedback to users. Exam questions do not display feedback and are used in scored exams.

Objective: Click  to search for and select an objective to link to the question.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Add Line: Click this button, then click **Click Here To Add A Question Stem** to add a question.

Add a multiple choice or multiple response question to the Question Bank

1. From the navigation bar, click **Content**.
2. Under Library, click **Question Bank**.

The **Questions page** (page 232) opens.

3. Click **Add**.

The **Question Properties page** (page 233) opens.

4. In the Question Template drop-down list, select **Multiple Choice** or **Multiple Response**.
5. Type the source and reference ID.

These are both used as filters when searching for questions.

6. Type the stem to the question.
7. (Optional) Add media items.
8. (Optional) Weight the questions and place in a specific order.

Media items display between the question and answers.

Note: This can be overridden when creating an exam.

9. Determine if the question is being used for exams, self-checks, or both.

Tip: Checking both gives you the most flexibility.

10. (Optional) Select the objective to which the question is tied.

While this is optional, it is a best practice to tie an objective to a question. This ensures that tracking and measurement is linked to the student and to the training correctly and consistently. It also improves analysis of training content when running reports. If all the students are getting a question wrong, designers can go back to that content for edits or revisions.

11. Select **Force Choice Order** to ensure that the answers to the questions are displayed in the same order to the student.
12. Type the answers in each of the answer boxes, and type in feedback immediately following the answer (if desired).
13. Click the X to indicate the correct answer.

The X turns into a green check mark.

14. Click **Add Choice** to add additional text boxes for choices and feedback.

Tip: Use the up and down arrows to move the choices and feedback.

15. For Multiple Responsive Question Template, click **Conditional Responses**. Type a conditional response for each correct answer and a conditional response for each wrong answer.

Conditional responses provide the ability to create self-check questions that progressively lead the learner toward selecting the correct response. Feedback is provided based on conditions. With each incorrect response, a different set of feedback can be provided to the user.

The conditional response appears after the choice response for each selection made by a student when answering the question in a self-check type exam.

16. Click a preview button to preview the question:
 - **Preview as Self-Check Question** displays feedback if provided.
 - **Preview as Exam** displays the question only.

17. Click **Add**.

Add a matching question to the Question Bank

1. From the navigation bar, click **Content**.
2. Under Library, click **Question Bank**.

The **Questions page** (page 232) opens.

3. Click **Add**.

The **Question Properties page** (page 233) opens.

4. In the Question Template drop-down list, select **Matching**.
5. Type the source and reference ID.

These are both used as filters when searching for questions.

6. Type the stem to the question.
7. (Optional) Add media items.

Media items display between the question and answers.

8. (Optional) Weight the questions and place in a specific order.

Note: This can be overridden when creating an exam.

9. Determine if the question is being used for exams, self-checks, or both.

Tip: Checking both gives you the most flexibility.

10. (Optional) Select the objective to which the question is tied.

While this is optional, it is a best practice to tie an objective to a question. This ensures that tracking and measurement is linked to the student and to the training correctly and consistently. It also improves analysis of training content when running reports. If all the students are getting a question wrong, designers can go back to that content for edits or revisions.

11. In the answer section:

- a. Highlight the Item X 'A' Pair and type in the first item. Then, highlight the Item X 'B' Pair and type the matching answer.
- b. Click **Feedback** and type in feedback for the selected answer (optional).
- c. Click **Add Pair** to create more matching items.

12. Click **Add**.

Add a fill in the blank question to the Question Bank

1. From the navigation bar, click **Content**.
2. Under Library, click **Question Bank**.

The **Questions page** (page 232) opens.

3. Click **Add**.

The **Question Properties page** (page 233) opens.

4. In the Question Template drop-down list, select **Fill in the Blank**.
5. Type the source and reference ID.

These are both used as filters when searching for questions.

6. (Optional) Weight the questions and place in a specific order.

Note: This can be overridden when creating an exam.

7. Determine if the question is being used for exams, self-checks, or both.

Tip: Checking both gives you the most flexibility.

8. (Optional) Select the objective to which the question is tied.

While this is optional, it is a best practice to tie an objective to a question. This ensures that tracking and measurement is linked to the student and to the training correctly and consistently. It also improves analysis of training content when running reports. If all the students are getting a question wrong, designers can go back to that content for edits or revisions.

9. In the answer section, do the following:
 - a. Click **Add Line** to add a new line to the item.
 - b. Click **Add Text** to type your new line.
 - c. Click **Add Blank** where the blank should go within the new line.

This opens the Word Options List. Type all of the possible responses for the new line.

- d. Click **Edit Feedback** to add feedback.

10. Click **Add**.

Copy a question from the Question Bank

1. From the navigation bar, click **Content**.
2. Under Library, click **Question Bank**.

The **Questions page** (page 232) opens.

3. Click **Search** or filter the search by typing additional information into the filter boxes.
4. In the list beside a question, click  and then click **Copy**.
5. On the message dialog box, click **OK**.

A copy of the question appears in the list of questions.

Media Bank

The Media Bank is used to store and manage digital assets within an enterprise. These assets can be uploaded, downloaded, and assigned to workgroup ownership rules.

Assets include the following types of files:

- Image
- GIF
- HTML
- JPG
- TIF
- EPS
- Office Document
- Word Document
- PowerPoint
- Adobe PDF
- Flash
- Audio
- Video

Media/Asset Bank page

Search

Clear

ID

Type

Name

Categories

Keywords

Created

From

To

Last Modified

From

Media/Asset Bank

Search

Add

ID		Name +	Type	Size	Created
700			_SRBI_ID_ProductLogos	0 KB	05-Mar-2015 12:35 PM
725			_SRBI_ID_ProductLogos	0 KB	05-Mar-2015 2:42 PM
752			_SRBI_ID_ProductLogos	0 KB	06-Mar-2015 1:30 PM
754	View in Preview Window	_SR-Learning	png	0 KB	06-Mar-2015 1:30 PM
753	View in Preview Window	_SR-Learning-hor	png	0 KB	06-Mar-2015 1:30 PM
756	View in Preview Window	_SR-Onboarding	png	0 KB	06-Mar-2015 1:30 PM
755	View in Preview Window	_SR-Onboarding-hor	png	0 KB	06-Mar-2015 1:30 PM
	View in	_SR-			

On the Media/Asset Bank page, you can search for and view existing assets. You can also:

- Add (upload) an asset
- View the properties for an asset
- Preview an asset
- Download an asset
- Replace an asset
- Delete an asset

Media Bank Upload page

The screenshot shows the 'MEDIA BANK UPLOAD' interface. At the top right are 'Add' and 'Refresh' buttons. Below the title is a red 'QUALITY ASSURANCE' banner. The 'Files' section has an 'Add Files' button. The 'Owner Type' dropdown is set to 'Workgroup'. The 'Owner' dropdown is set to '(none)'. The 'Categories' section has two lists: 'Assigned' (empty) and 'Available' (containing AICC Test Suite, ClinPhone, Corporate Internal, GenProbe, GL Training and Implementation, Imagen Features Demo, New Hire, and SCORM Courses). The 'Keywords' section has an empty input field.

On the Media Bank Upload page, you select a media file to upload and then define its properties.

Fields

Files: Click **Add Files** to browse to find media file(s) to upload. A progress bar shows the progress of each media file upload. You can upload more than one media file at a time. You can even upload a compressed file and have the files unzip by selecting the **Unzip file** check box:

This screenshot shows the file upload progress area. It displays a file named 'Content (6854).zip' with a size of '3.1 MB'. To the left of the file name is a 'Delete' button. To the right is an unchecked checkbox labeled 'Unzip file'.

Owner Type: Assign ownership of the media file by selecting one of the following types:

- Workgroup
- Current User

- Administrator

Owner: Click  to search for an select the owner for the media file.

Note: This field only appears if Workgroup or Administrator is selected in Owner Type.

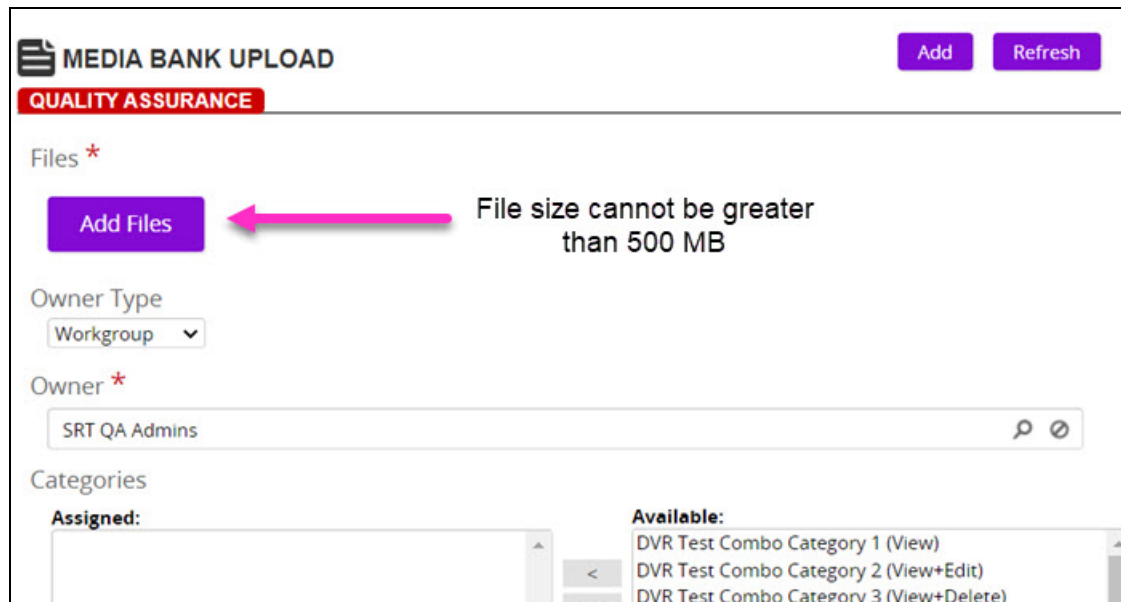
Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Keywords: To assign a keyword, type a keyword. Click the left arrow to add the keyword to the list. Repeat for each keyword that you want to assign.

Copyright: Type the copyright information for the media file.

File size limitation for content imports

Rival Learn limits the size of content imports to 500 MB per import. This file size limitation applies to the import process—like when adding files in the Media Bank and importing a SCORM or AICC package.



MEDIA BANK UPLOAD Add Refresh

QUALITY ASSURANCE

Files *

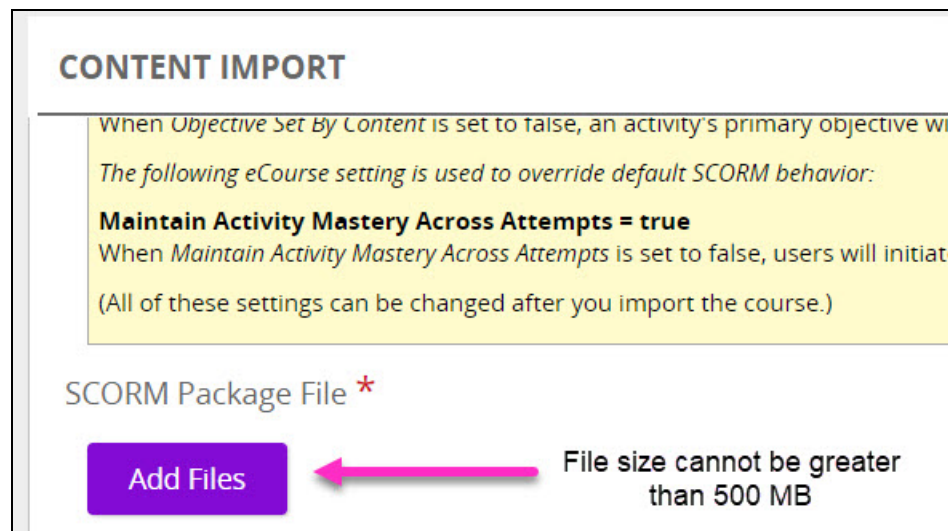
Add Files ← File size cannot be greater than 500 MB

Owner Type
Workgroup ▼

Owner *
SRT QA Admins  

Categories

Assigned:	Available:
	DVR Test Combo Category 1 (View)
	DVR Test Combo Category 2 (View+Edit)
	DVR Test Combo Category 3 (View+Delete)



CONTENT IMPORT

When *Objective Set By Content* is set to false, an activity's primary objective will

The following eCourse setting is used to override default SCORM behavior:

Maintain Activity Mastery Across Attempts = true

When *Maintain Activity Mastery Across Attempts* is set to false, users will initiate

(All of these settings can be changed after you import the course.)

SCORM Package File *

Add Files ← File size cannot be greater than 500 MB

If you have large files like videos and images, best practice is to optimize them before importing them into Rival Learn.

Optimizing content

Optimizing content *before* you upload/import into Rival Learn achieves two things:

- Reduces file size
- Ensures an optimum viewing experience when consuming course content

Here are some tips on optimizing content:

Content type	How to optimize
Images	▶ Use your graphics editing software to shrink/compress images. ▶ Use JPG images. JPGs are the smallest size and provide solid image quality especially on the web.
PowerPoint	Lower the default resolution for images to reduce the overall file size.
Videos	▶ Use your video editing software (like Windows Video Editor, iMovie, Splice, etc.) to compress files without compromising quality and reduce loading times/bandwidth usage when the videos are played. ▶ Select the best format for your videos. MP4 is a solid choice for the web.

Add (upload) an asset to the Media Bank

Note: There is a **file size limitation** (see "**File size limitation for content imports**" on page 243) for uploading content.

1. From the navigation bar, click **Content**.
2. Under Library, click **Media Bank**.

The **Media/Asset Bank page** (page 241) opens.

3. Click **Add**.

The **Media Bank Upload page** (page 242) opens.

4. From Files, click **Add Files** to browse and select media file(s) to upload.

Tip: You can upload multiple files at the same time. A progress bar shows the progress of each upload. Once uploaded, file name(s) appear along with a Delete button in case you need to delete and re-upload.

5. Complete the remaining properties.

Note: If you uploaded multiple files, the properties you set apply to all of them.

6. Click **Add**.

Reference

References are media items that appear on the student home page. They are not tied to any course. References can be shared with all or selected students. References may include things like user guides.

References page

Search

Clear

Name

Group Title

References

Search

Add

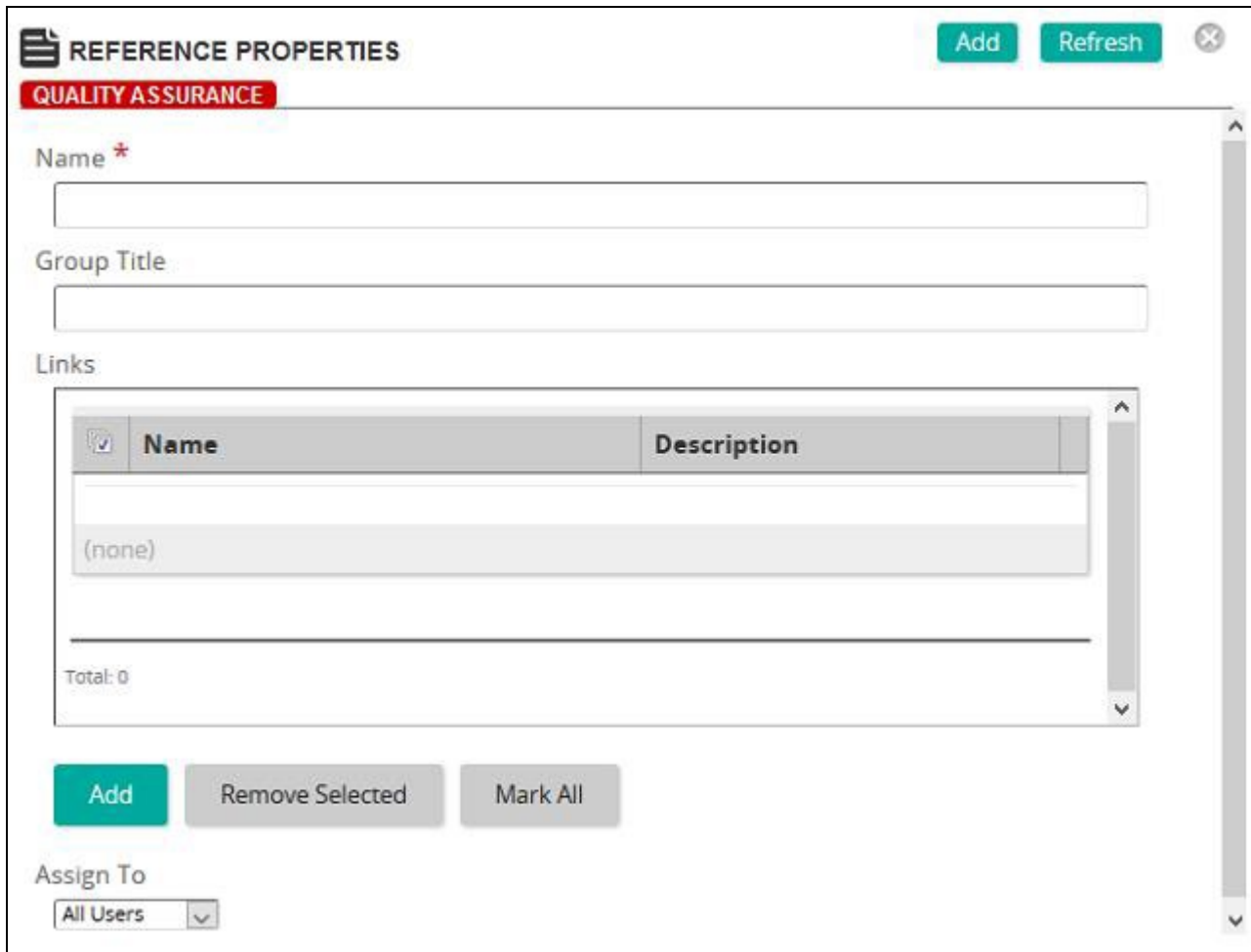
Name	Group Title +	
(empty)		⋮
Project Management Methodologies	Project Management Guides	⋮
Safety Reference	Safety Reference - Quick Reference Documents	⋮
Ole Presentation	Safety Reference - Safe Operating Procedures	⋮

Total: 4

On the References page, you can search for and view existing references in the library. You can also:

- Add a reference to the library
- View the properties for a reference
- Delete a reference

Reference Properties page



REFERENCE PROPERTIES Add Refresh

QUALITY ASSURANCE

Name *

Group Title

Links

☒	Name	Description
	(none)	

Total: 0

Add Remove Selected Mark All

Assign To

All Users

On the Reference Properties page, you define the properties for the reference.

Fields

Name: Type a name for the reference group.

Group Title: Type the group title.

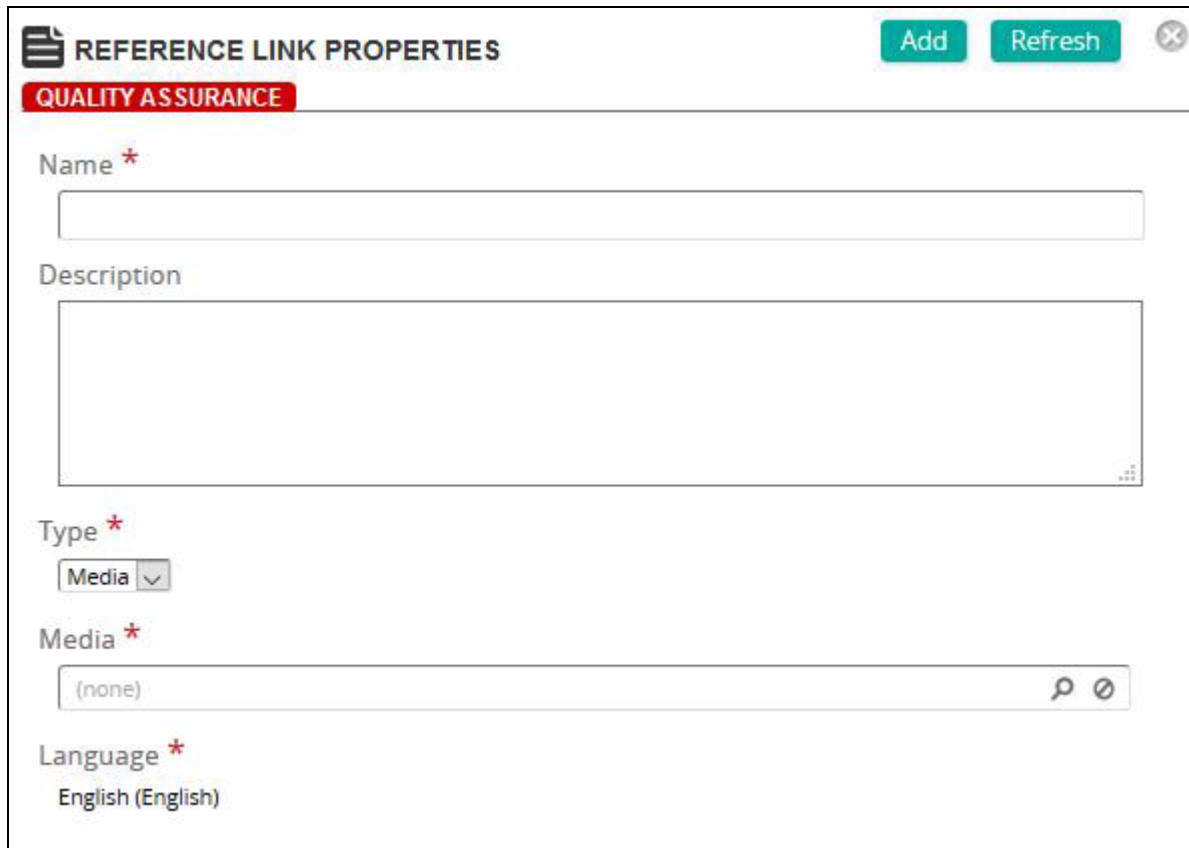
Links: Click **Add** to display the **Reference Link Properties page** (page 247) where you add a media item or items to the reference.

Assign To: Select one of the following options:

- **All Users:** The reference is available to all Rival Learn users.
- **User Criteria:** The reference is available to users based on the user criteria selected.

User Criteria: If you selected User Criteria in the Assign To list, select the criteria to limit the users who can access the reference. You can limit by jobs, groups, job categories, and organizations.

Reference Link Properties page



The screenshot shows the 'REFERENCE LINK PROPERTIES' form. At the top right are 'Add' and 'Refresh' buttons. Below the title is a red 'QUALITY ASSURANCE' banner. The form contains several fields: 'Name' with a red asterisk and an empty text box; 'Description' with an empty text area; 'Type' with a red asterisk and a dropdown menu currently showing 'Media'; 'Media' with a red asterisk and a dropdown menu currently showing '(none)' with search and clear icons; and 'Language' with a red asterisk and a dropdown menu currently showing 'English (English)'.

On the Reference Link Properties page, you describe the reference you are creating and select the media object or URL to use as the reference.

Fields

Name: Type a name for the reference link.

Description: Type a description for the reference link.

Type: Select one of the following:

- Media
- URL

URL: (Appears only if URL is selected in Media drop-down list) Type a URL to link to this reference.

Media: (Appears only if Media is selected in the Media drop-down list) Click to search for and select a media object from the Media/Asset library to link to this reference.

Languages: To assign languages, click a language or languages from the Available list and use the arrow buttons to move them to the Assigned list.

Add a reference to the library

1. From the navigation bar, click **Content**.
2. Under Library, click **Reference**.

The **References page** (page 245) opens.

3. Click **Add**.

The **Reference Properties page** (page 246) opens.

4. In the Name text box, type the name of the reference group.
5. In the Group Title text box, type the group title.

Tip: If using multiple languages, type the group title in each of the applicable language Group Title boxes.

6. From Links, click **Add** to add media items to the reference.

The **Reference Link Properties page** (page 247) opens.

7. Provide a name and description for the reference media.
8. From the Type drop-down box, select:
 - **Media**, then in the Media box, click  to search for and select a media object.
 - **URL**, then type a URL in the URL box
9. (If applicable) Assign languages.
10. Click **Add**.

The **Reference Properties page** (page 246) opens.

11. From the Assign to box, select:
 - **All Users** to make the reference available to all Rival Learn users.
 - **User Criteria** to limit the reference to users based jobs, groups, job categories, and/or organizations.
12. Click **Add**.

Replace Content

Privileged admin users can replace the existing content in an eCourse with a newly imported SCORM package. Using this feature removes an existing native content object and any other content objects in an existing eCourse and replace it with a new native content object defined by a valid SCORM package.

Replace native content object in an eCourse (Admin portal)

1. From the navigation bar, click **Content**.
2. Under Library, click **Replace Content**.
The Replace Content page opens.
3. From the **Import Type** drop-down box, select **SCORM**.
4. Leave the **Use Recommended Import Settings** check box selected.
5. In the SCORM Package File section, click **Add Files** and then browse for SCORM file to upload.
6. From the SCORM eCourse to REPLACE field, search for and select the SCORM eCourse to replace.
7. Edit the reference and version name associated with the eCourse and new native content object.

Note: The original eCourse Name and the ImportDate fields are read-only and cannot be modified.

8. Click **Begin Import Replacement**.

A summary screen appears notifying you about the successful import replacement or an error if the replacement is not successful.

Import

The Library Import feature gives instructional designers and content creators the ability to import SCORM or AICC compliant files into the Rival Learn library. The import process is performed on the Content Import page.

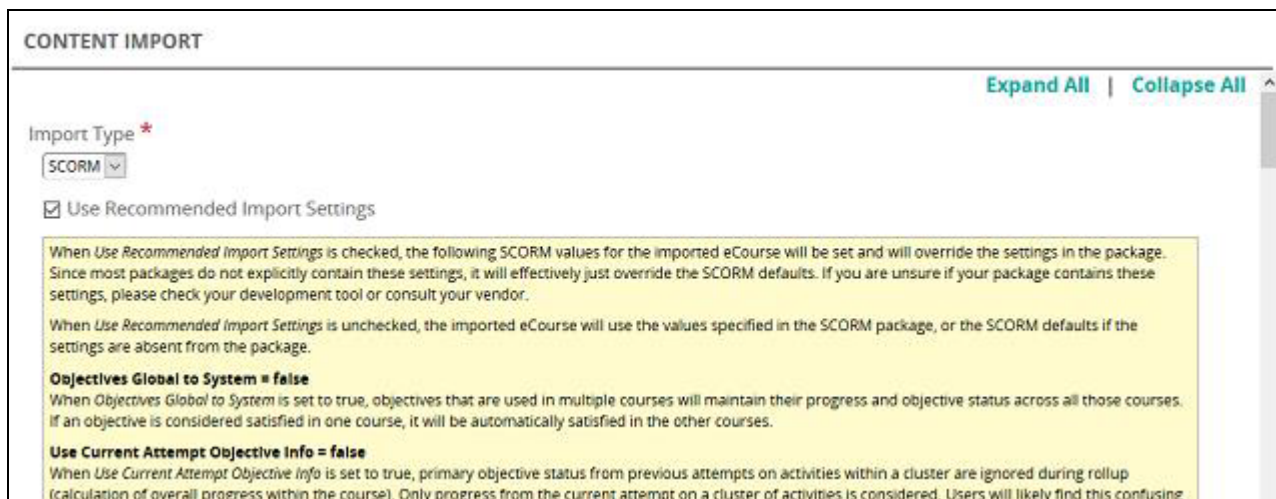
SCORM and AICC

SCORM and AICC are technical standards that tell programmers how to write code so that learning that uses that “code” works well in a variety of circumstances.

For example, many learning professionals use authoring software to create online learning courses. SCORM and AICC coding ensures that what is published works in a variety of circumstances where that learning is delivered.

Rival Learn works with both standards.

Content Import page



CONTENT IMPORT

Expand All | Collapse All

Import Type *

SCORM

☒ Use Recommended Import Settings

When Use Recommended Import Settings is checked, the following SCORM values for the imported eCourse will be set and will override the settings in the package. Since most packages do not explicitly contain these settings, it will effectively just override the SCORM defaults. If you are unsure if your package contains these settings, please check your development tool or consult your vendor.

When Use Recommended Import Settings is unchecked, the imported eCourse will use the values specified in the SCORM package, or the SCORM defaults if the settings are absent from the package.

Objectives Global to System = false

When Objectives Global to System is set to true, objectives that are used in multiple courses will maintain their progress and objective status across all those courses. If an objective is considered satisfied in one course, it will be automatically satisfied in the other courses.

Use Current Attempt Objective Info = false

When Use Current Attempt Objective Info is set to true, primary objective status from previous attempts on activities within a cluster are ignored during rollup (calculation of overall progress within the course). Only progress from the current attempt on a cluster of activities is considered. Users will likely find this confusing.

The Content Import page allows you to import SCORM or AICC zip files (content objects) into the Rival Learn Library.

After you import a SCORM (v 1.2 or 2004) or AICC content object, it is important that you validate the activity settings within the content object to ensure that the objects used to set the mastery or completion have the correct settings. Some imported objects do not set these values correctly, so this ensures students completing the object cannot master or complete the object until all required objects are complete.

Fields

Import Type: Select either:

- SCORM
- AICC

Use Recommended Import Settings: (SCORM only) Leave this check box selected. These are the most common setting for most imported objects to optimize how users view content in Rival Learn.

Note: Refer to the SCORM Sequencing and Navigation section for detailed explanations on each of these settings.

Tip: To upload multiple SCORM packages, combine the multiple SCORM packages in a ZIP file and Rival Learn uploads and creates multiple courses at once.

SCORM Package File: Click **Add Files** to browse and select SCORM file(s) to upload. A progress bar shows the progress of each upload. Once uploaded, file name(s) appear along with a Delete button in case you need to delete and re-upload.

AICC AU (Assignable Units) File: (AICC only) Click **Add File** to browse and select the AICC assignable units file to upload.

AICC CRS (Course Interchange) File: (AICC only) Click **Add File** to browse and select the AICC course interchange file to upload.

AICC CST (Course Structure) File: (AICC only) Click **Add File** to browse and select the AICC course structure file to upload.

AICC DES (Descriptor) File: (AICC only) Click **Add File** to browse and select the AICC descriptor file to upload.

Course

Name: Type a name for the course. If you leave this field blank, the import process uses the course name specified in the imported package.

Set Tree Review Mode: Select an option:

- **After Mastery:** Tracking data is recorded and mastery is rolled up into the course.
- **Always:** Tracking data is not recorded, and content completion does not rollup Mastery into the course. This can be useful if you have a course with reference content you want to keep on a student's training list, without recording progress. Each time the student enters the course is like the first time.
- **Never:** Tracking data is recorded as a student progresses through content, but content completion does not rollup Mastery into the course record. This keeps the course on the Student Homepage, even if the student completes and masters the content.

Show Activity Tree: Select this check box to configure whether the Activity Tree Menu is visible. For existing eCourses and new eCourses, Show Activity Tree defaults to ON. This is also available when importing new content using either SCORM or AICC import as part of the course settings. The default is set to OFF.

Enrollment Approval Required: Select this check box if approval is required before enrollment.

Allow User Registration by Supervisors: Select this check box to give supervisors the ability to register a user for the eCourse.

Course Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Content Object

Reference: Type a reference for this item to make it easier to find in searches.

Status: Select an option:

- **Under Development:** Content objects will be created in the Authoring tab.
- **Staging:** Content objects will be created in the Staging tab.

- **Approved:** Content objects will be created in the Library tab.

SCORM LearnerID: This ID is based on a user and course, so User+UserCourse is the default. It is a unique identifier generated by Rival Learn when a user launches a course from the Student Portal. For most implementations, this value should not be changed. The only case where this might be changed to the other value "User" is for customers who have third-party courseware providers who expect a "User" ID to be the unique identifier passed from the LMS and not a combination "User+UserCourse".

Keywords: To assign a keyword, type a keyword. Click the left arrow to add the keyword to the list. Repeat for each keyword that you want to assign.

Content Object Category: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Convert HTTP URLs to HTTPS: For AICC import type, all non-secure HTTP URL references are converted to secure HTTPS URLs by default unless you uncheck this box.

Load in Separate Window: This setting controls how imported content is launched in Rival Learn. By default, content launches inline with no pop-up window unless you change this setting (check this box). Checking this box launches content in a browser pop-up window.

Import a content object into the Rival Learn library

Note: There is a **file size limitation** (see "**File size limitation for content imports**" on page 243) for uploading content.

1. From the navigation bar, click **Content**.
2. Under Library, click **Import**.
The **Content Import page** (page 249) opens.
3. From the **Import Type** drop-down box, select **SCORM** or **AICC**.
4. If you selected:
 - SCORM as the import type, leave the Use Recommended Import Settings check box selected.
 - AICC as the import type, the Use Recommended Import Settings check box does not apply.
5. Browse for files to upload and select them.
6. In the Course section of the page, complete the following for the eCourse:
 - a. In the Name text box, type the name of the course. If left blank, the course name in the Package or AICC descriptor is used.
 - b. Determine if the student can review the course by selecting an option from the Set Tree Review Mode drop-down box:
 - **After Mastery:** The course moves to History and student can review it from the History page
 - **Always:** The course remains on My Training and data is not tracked
 - **Never:** The course remains on My Training, data is tracked but mastery is not recorded
 - c. Select **Show Activity Tree** check box to configure whether the Activity Tree Menu is visible.
 - d. Select the **Enrollment Approval Required** check box to control enrollments in Rival Learn eCourses.
 - e. Select **Allow User Registration by Supervisors** check box.
 - f. In the Reference text box, type a reference to make it easier to find objects for editing or deleting after import.

- g. Select a course category.
7. In the Content Object section of the page, complete the following for the content object:
 - a. Select a status:
 - **Under Development:** Content objects will be created in the Authoring tab.
 - **Staging:** Content objects will be created in the Staging tab.
 - **Approved:** Content objects will appear in the Library tab.
 - b. Add keywords.
 - c. Select a category.
 - d. For AICC import type, determine whether to:
 - Convert all non-secure HTTP URL references to secure HTTPS URLs. By default, the **Load in a separate window** check box is checked. If you do not want all non-secure HTTP URL references to convert to secure HTTPS URLs, clear the check box.
 - Import AICC content and automatically display the AICC SCO inline when the content is launched. By default, the **Load in separate window** check box is not checked. If you want AICC content to launch in a separate window, check the check box.
8. Click **Begin Import**.

Export

The Export feature allows administrators to export an eCourse from the Rival Learn library as an AICC HACP or SCORM standardized package. The export process is performed on the Export page.

Export page

CONTENT EXPORT

Export Type *

SCORM 1.2

eCourse *

(none)

Skin

(default)

Mastery Score

70

☒ Flag failed content as incomplete (if not checked, will flag as failed)

☐ All exported SCOs may be scored by LMS (if not checked, content not marked as scored will never return a score)

☒ Export complete package (if not checked, will only export manifest)

Export Language

English (English)

Begin Export >>

The Export page allows you to export an eCourse from the Rival Learn library to an AICC HACP or SCORM standardize package.

The fields on this page vary depending on the export type that you choose.

Fields

Export Type: Select one of the following options:

- AICC HACP

Note: When exporting in AICC HACP format, the export package does not include launch pages for your content. For sample launch pages or additional information, please contact Rival Support.

- SCORM 1.2
- SCORM 2004 3rd Edition
- SCORM 2004 4th Edition

eCourse: Click  to display the eCourses page to search for and select an eCourse.

Skin: Select a skin from the drop-down list.

Mastery Score: Type a mastery score or accept the default as specified in the company settings.

Flag failed content as incomplete (f not checked, will flag as failed): Select this check box to only return scores for the items that are marked scored.

All exported SCOs may be scored by LMS (if not checked, content not marked as scored will never return a score): (SCORM 1.2 only) Select the check box to allow the LMS to determine the score for all SCOS.

Note: Default is off, which means content not marked as scored will never return a score.

Export complete package (if not checked, will only export manifest): (SCORM export types only) Select this check box to export all content as well as the manifest file. If unchecked, only the manifest file will be exported.

Export Sequencing Rules: (SCORM 2004 3rd & 4th editions) Select this check box to export all defined sequencing rules with the content.

Export Objectives: (SCORM 2004 3rd & 4th editions) Select this check box to export all local and global defined objectives with the content.

Export Language: Select the language for the export.

Export an eCourse from the Rival Learn library

1. From the navigation bar, click **Content**.
2. Under Library, click **Export**.

The **Export page** (page 252) opens.

3. Select the export type.
4. Select the eCourse to export.
5. Select the skin to export.
6. Complete the remaining fields as appropriate.
7. Click **Begin Export**.

Delivery

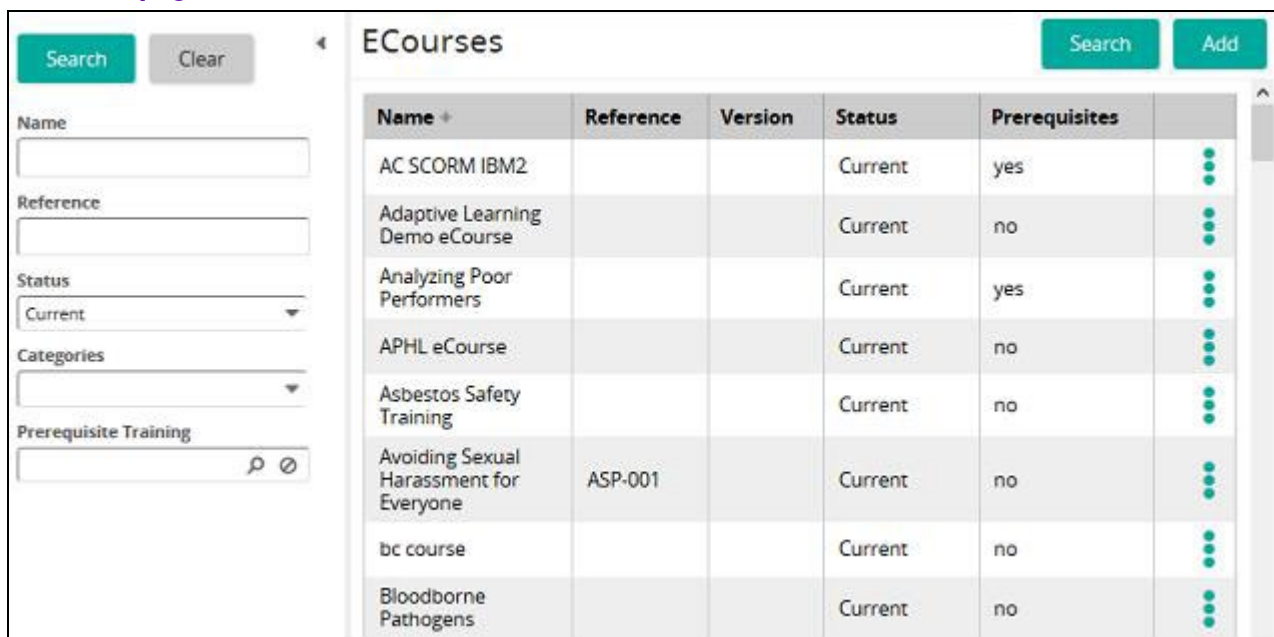
Delivery allows for the publishing of content objects in eCourses and the creation or modification of skins and their associated pages.

eCourses

Administrators can combine approved content objects into an eCourse. These eCourses can then be:

- Associated to a qualification and applied to student users based on a combination of their Org chart, job, job category, or student group
- Defined as a catalog item to publish to a training catalog
- Exported as packaged SCORM or AICC standards-based courseware

eCourses page

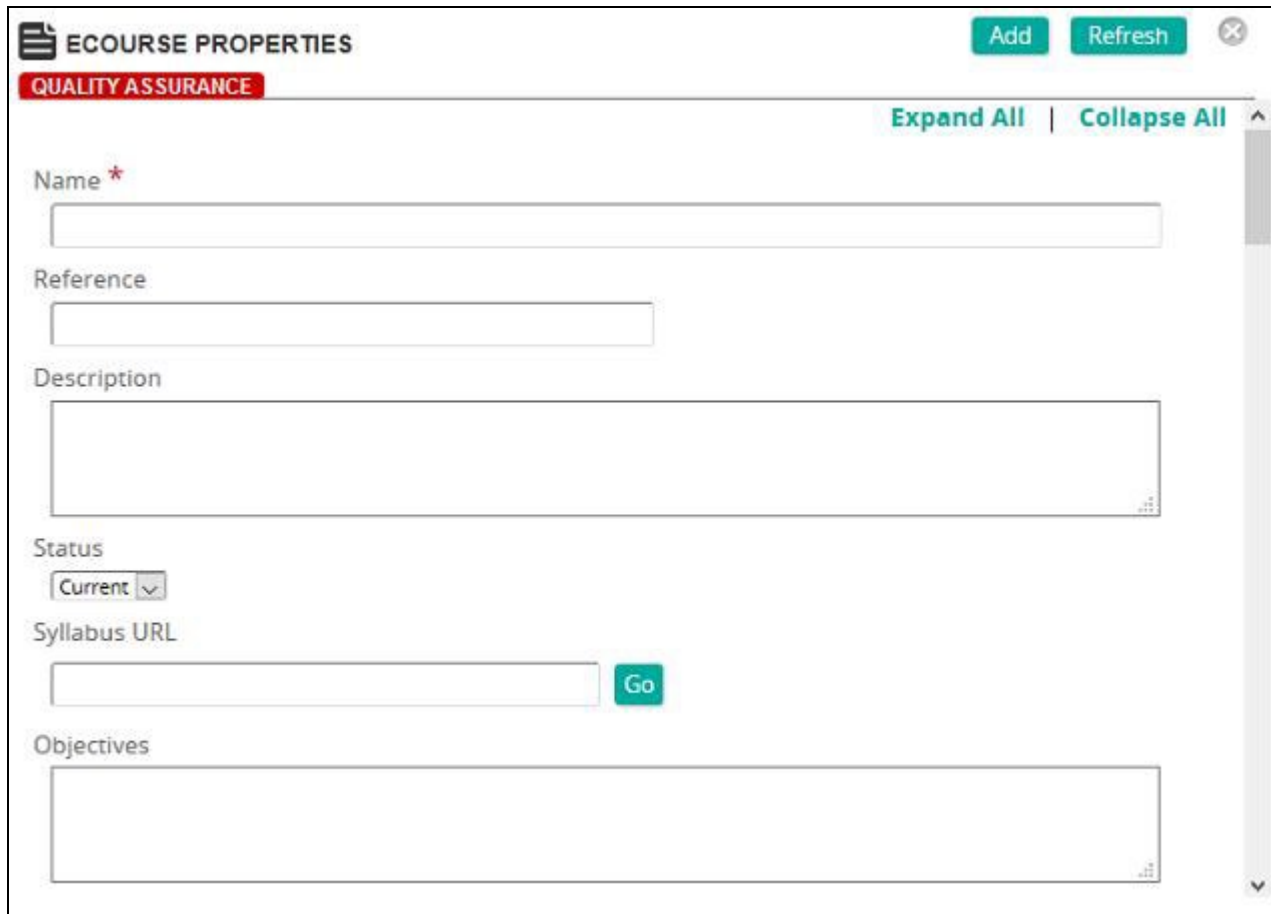


Name	Reference	Version	Status	Prerequisites	
AC SCORM IBM2			Current	yes	⋮
Adaptive Learning Demo eCourse			Current	no	⋮
Analyzing Poor Performers			Current	yes	⋮
APHL eCourse			Current	no	⋮
Asbestos Safety Training			Current	no	⋮
Avoiding Sexual Harassment for Everyone	ASP-001		Current	no	⋮
bc course			Current	no	⋮
Bloodborne Pathogens			Current	no	⋮

The eCourses page shows the eCourses available in the Rival Learn Library. On this page, you can search for and select an eCourse and also:

- Publish an eCourse
- View properties for an eCourse
- Delete an eCourse

eCourse Properties page



The screenshot shows the 'eCourse Properties' form. At the top, there's a title bar with 'ECOURSE PROPERTIES', 'Add', 'Refresh', and a close button. Below this is a red 'QUALITY ASSURANCE' banner. To the right of the banner are 'Expand All' and 'Collapse All' links. The form fields include: 'Name' (required, marked with a red asterisk), 'Reference', 'Description', 'Status' (a dropdown menu currently showing 'Current'), 'Syllabus URL' (with a 'Go' button), and 'Objectives'. A vertical scrollbar is visible on the right side of the form.

Use the eCourse Properties page to define the properties for an eCourse.

Fields

Name: Type a name for the eCourse.

Reference: Type a reference for this item to make it easier to find in searches.

Description: Type a description for the eCourse.

Status: Select **Current** or **Legacy**.

Syllabus URL: Type the syllabus URL if you are using an external document management system to store course syllabus information.

Objective: Type the objectives of the eCourse.

Outline: Type the outline of the eCourse.

Prerequisite Training: If the eCourse requires any prerequisites, add them here. Click **Add** to add a prerequisite, click **Remove Selected** to remove selected prerequisites, and click **Mark All** to mark all the prerequisites for removal from the Prerequisite Training grid.

Prerequisite Notes: Type any information to further describe or explain prerequisite requirements.

Version: Type the version for this eCourse. Version data is always attached to the user-course record when created so it can be reported by a History or Qualification report.

Administrator Name: Type the name of the course administrator.

Administrator Email: Type the email of the course administrator.

List Price per Course: Type the dollar amount per course.

List Price per Student: Type the dollar amount per student.

Launch Content Objects as Modules: Select this check box to provide students with the ability to launch a content object within the eCourse.

Show Activity Tree: Select this check box to configure whether the Activity Tree Menu is visible. For existing eCourses and new eCourses, Show Activity Tree defaults to ON. This is also available when importing new content using either SCORM or AICC import as part of the course settings. The default is set to OFF.

Enrollment Approval Required: Select this check box if approval is required before enrollment.

Allow User Registration by Supervisors: Select this check box to give supervisors the ability to register a user for the eCourse.

Student May Cancel eCourse Enrollment: Select this check box to allow students the ability to cancel an eCourse enrollment.

Forced Navigation: Select this check box to force students to proceed sequentially through all content objects in the eCourse.

Maintain Activity Mastery Across Attempts: Select this check box to ensure that content will remain mastered once mastered, regardless of initiating a new attempt on the activity.

Note: Rival Learn sets Maintain Activity Mastery Across Attempts to ON by default. Turning this setting to OFF means mastery status for the activity will be reset with each attempt on the activity. It is recommended this setting remain ON.

Objectives Global To System: Select this check box to maintain all defined objective values across multiple course records for end users. Any objectives defined within a content objective or associated to a Enabling Objective will maintain their values across multiple courses.

Unless there is a specific reason to maintain objective values across multiple eCourses, it is recommended this value remain at the default state of OFF.

Allow Course to Roll Up on Completion Only: Rival Learn expects that all required activities send a success status of Passed before it rolls up the activity as mastered. However, some content vendors do not always send a success status of Passed but instead send a Completed completion status. In these cases, the content is never considered mastered because a Passed status is not communicated.

You can use this option to get around that. By selecting (checking) this box, you identify that this eCourse can be considered mastered when only a Completed status is communicated to Rival Learn.

Certification Type: Select a default certification type to define the certification and recertification time periods to meet a qualification condition.

Grading Type: Select a grading type. Typical options include:

- Complete/Incomplete
- Checklist
- Percentage

Default CEUs: Type a default CEU (Continuing Education Unit) number.

Default CEUs Reference: Type a default CEU reference. The reference is usually used to store the CEU unit value (for example, hours, credit, points, and so on).

Course Duration: The estimated time it will take for a student to complete this eCourse. The time you enter here is shown in the Course Catalog.

Media: Click  to search for and select a media file from the Media/Asset Bank.

Content Objects: Click **Add** to select content objects from the Content Objects page. When multiple content objects are associated, Rival Learn displays all objects as a single activity tree unless Show Content Objects in the Student Homepage is set to ON.

Student Tree Start: Select **Resume** or **None**. Resume will resume to the last suspended activity to display. None does not select or display any activity (students must select an activity to display).

Review Mode: Select an option:

- **After Mastery:** Tracking data is recorded and mastery is rolled up into the course.
- **Always:** Tracking data is not recorded, and content completion does not rollup Mastery into the course. This can be useful if you have a course with reference content you want to keep on a student's training list, without recording progress. Each time the student enters the course is like the first time.
- **Never:** Tracking data is recorded as a student progresses through content, but content completion does not rollup Mastery into the course record. This keeps the course on the Student Homepage, even if the student completes and masters the content.

Languages: To assign languages, click a language or languages from the Available list and use the arrow buttons to move them to the Assigned list.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Skin: Select a skin from the drop-down list.

Cost Center: To assign a cost center or centers, click  to search for and select cost centers from the Cost Centers page.

Vendor: Click  to search for and select a vendor from the Vendors page.

Publish an eCourse

From the navigation bar, click **Content**.

1. Under Delivery, click **eCourses**.

The **ECourses page** (page 254) opens.

2. Click **Add**.

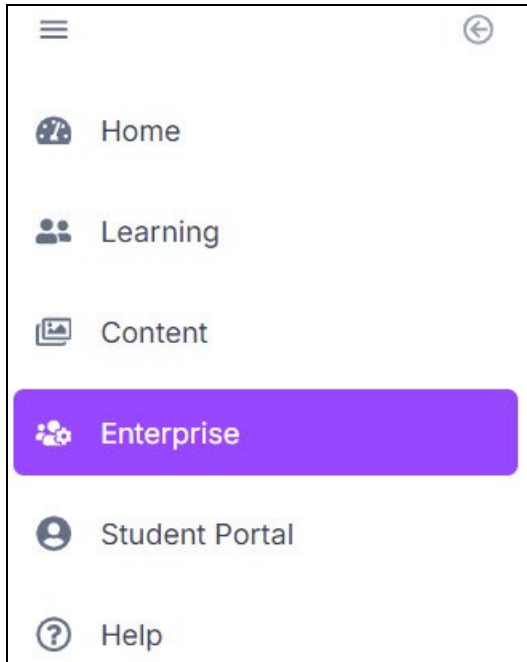
The **ECourse Properties page** (page 255) opens.

3. Type a name, reference, and description for the course.
4. (Optional) Add another course as a prerequisite and enter any notes about the prerequisite.
5. (Optional) Type a version number for the course.
6. Check the applicable check boxes if:
 - The content objects that make up the eCourse should be visible to the student.

- The Activity Tree should be visible to the student.
 - Enrollment in the course requires approval.
 - Registration for course can be done by supervisors.
 - Student can remove this course from personal training list of courses.
 - You want to force the student to progress through the content in order from start to finish.
 - Student activity is maintained if the student closes the course and returns to it at a later time.
 - You want all other courses referencing the same objective to be marked satisfied when the student satisfies the objective in this content. (Rival Support can provide more information on this option before using it.)
7. Select a certification type if this course needs to be mastered in a certain period of time.
 8. Select a grading type.
 9. Type the duration of the course.
 10. Add the content object or objects that belong with this course.
 11. (Optional) Assign categories to the course.
 12. Select a skin for the course.
 13. (Optional) Assign cost centers to the course.
 14. (Optional) Assign vendors to the course.
 15. Click **Add**.

Configure and manage Rival Learn

The Enterprise module contains tools to help you manage and configure Rival Learn to meet your company's needs. The available options vary based on the Rival Learn components that were installed and configured on your system.



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Organization

The Organization tab contains sub tabs that define the basic organizational structure and rules of a particular enterprise.

Jobs

Jobs are used to define jobs within an organization and are another method of distributing learning throughout an enterprise. Jobs are defined and managed by integration with an HR system and defined through an import. Jobs are also useful for reports and search filters.

Jobs page

Search

Clear

Job Code

Title

External Key

Categories

Jobs

Search

Add

Job Code	Title	
005	Accountant	
3400	Commercial Driver	
003	Customer Service Representative	
GenProbe001	GenProbe JOB 001	
GenProbe002	GenProbe JOB 002	
002	HR Administrator	
401	Junior Instructor	
207	Maintenance Engineer	
410	Manager	
200	Registered Nurse	

The Jobs page lists the jobs that have been set up in Rival Learn. On this page, an administrator can:

- View jobs
- Search for jobs
- Add a job
- Delete a job
- View properties for a job

Job Properties page

On this page, an administrator defines the properties for a job.

Fields

Job Code: Type a job code ID.

Title: Type a descriptive name for the job.

External Key: If applicable, enter an external key ID for the job.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Links: Click **View Links** to see any associated links to membership or qualifications.

Add a job

1. From the navigation bar, click **Enterprise**.
2. Under Organization, click **Jobs**.

The **Jobs page** (page 260) opens.

3. Click **Add**.

The **Job Properties page** (page 261) opens.

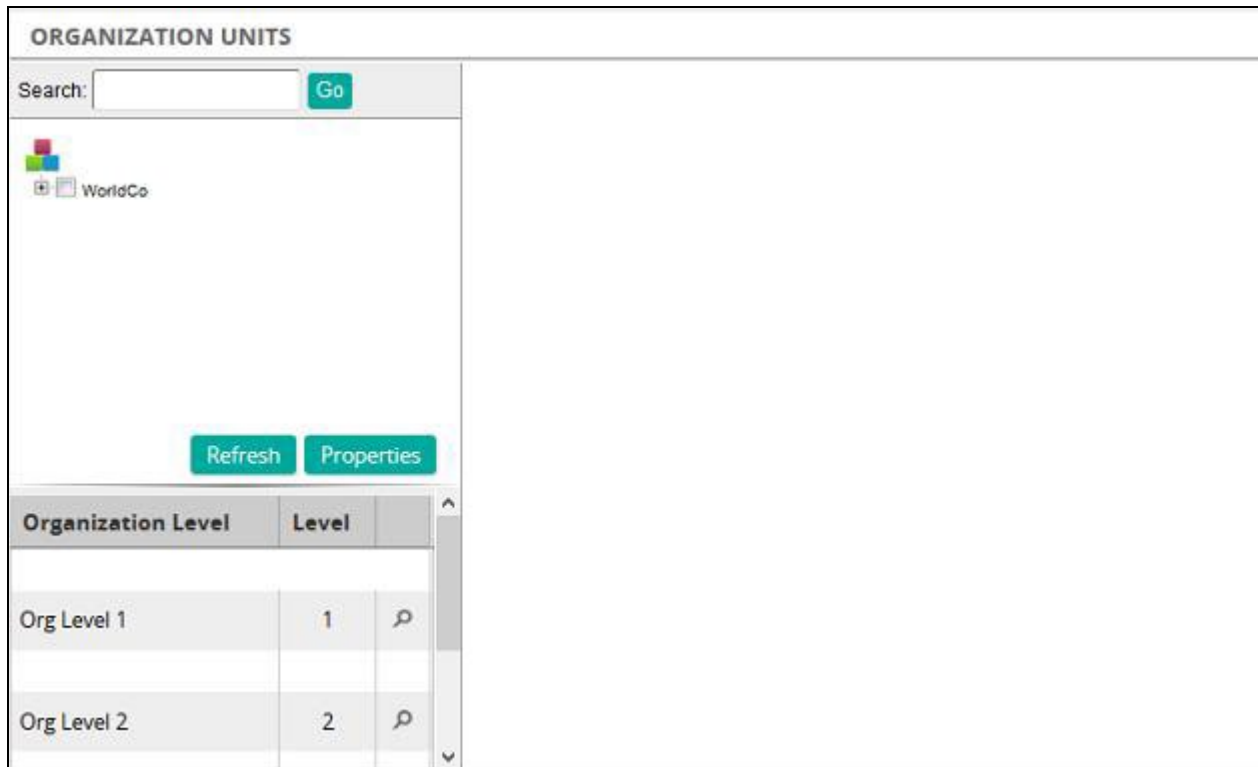
4. Complete the fields.
5. Click **Add**.

Org chart

Org chart is a hierarchical representation of the various divisions within an organization. In Rival Learn, administrators can use an org chart to assign training to various organization units. For example, an administrator can assign learning to the Sales department. Every individual assigned to that organization unit automatically receives the training associated with it.

Typically, organization units are defined and managed by integration with an HR system and defined through an import. However, it is possible to manually create them. This is done on the Organization Units page.

Organization Units page



The screenshot shows the 'ORGANIZATION UNITS' page. At the top, there is a search bar with a 'Go' button. Below the search bar, there is a tree view showing a hierarchy starting with 'WorldCo'. To the right of the tree view are 'Refresh' and 'Properties' buttons. Below these buttons is a table with two columns: 'Organization Level' and 'Level'. The table contains two rows: 'Org Level 1' with level '1' and 'Org Level 2' with level '2'. Each row has a plus sign icon to its right.

Organization Level	Level
Org Level 1	1
Org Level 2	2

On the Organization Units page, you create an org chart by creating organization units based on levels. The number of levels required is established and setup during setup configuration. These levels can be labeled and customized for your organization. The maximum number of levels is 10.

If created, your organization's org chart appears in the upper left. If organization units (levels) have been assigned, the org chart has a plus sign. Click the plus sign to expand to see the hierarchy.

Below the org chart are the organization levels. To find a specific organization unit, click  beside an org level. For example, to find an organization unit at the second level of the org chart, click  for Org Level 2. A search box appears in the upper right of the page.

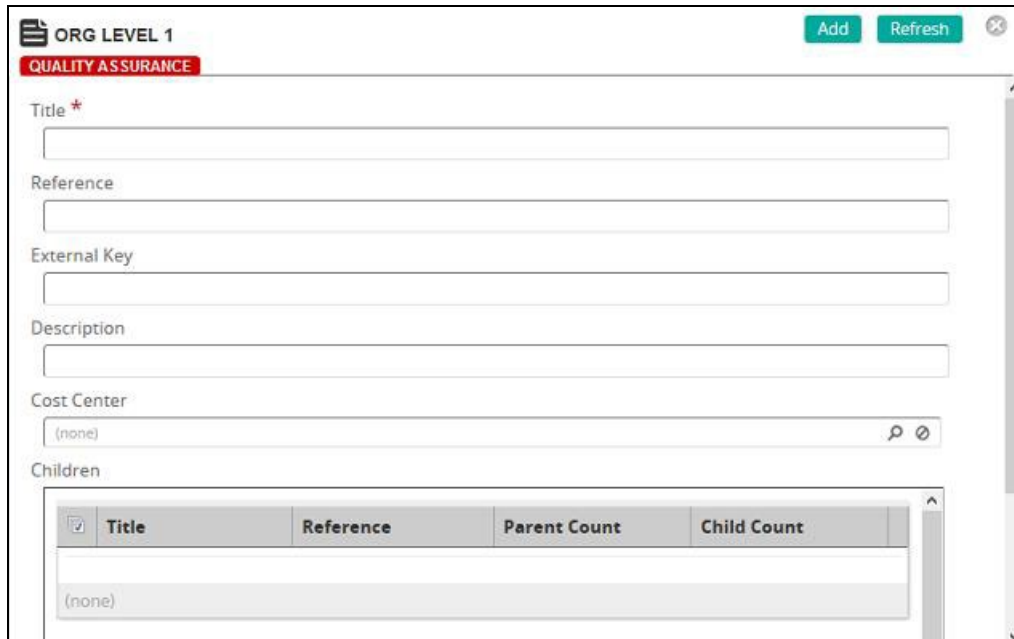


The screenshot shows a search box for 'ORG LEVEL 15'. It includes 'Search', 'Add', and 'Filter' buttons. Below the buttons are three input fields labeled 'Title:', 'Reference:', and 'External Key:'.

From the search box, you can:

- Enter search criteria such as title, reference, or external key to quickly find an organization unit
- Filter an organization unit
- Add an organization unit

Org Level pages



On the Org Level pages, you define an organization unit based on the level it is to appear in an org chart. You can have up to 10 levels in an org chart.

Fields

Title: Type a title for the organization unit.

Reference: Type a reference for this item to make it easier to find in searches.

External Key: If the organization level has an associated external key, enter it here.

Description: Type a description for the organization unit.

Cost Center: To assign a cost center or centers, click  to search for and select cost centers from the Cost Centers page.

Children: Click **Add** to select an organization unit or units to be a child level of the organization unit. For example, if you are creating an org level 3 organization unit, the children are level 4.

Create an organization unit

1. From the navigation bar, click **Enterprise**.
2. Under Organization, click **Org Chart**.

The **Organization Units page** (page 262) opens.

3. In the Organization Level window, click  beside an org level.

Tip: Select the org level where you want the organization unit to be available on the org chart. For example, for a organization unit to be available on level 2 of the org chart, click  beside Org Level 2.

4. Click **Add**.

The **Org Level page** (page 263) opens.

5. Complete the fields as appropriate.
6. Click **Add**.

The organization unit is now available for selection when creating an org chart.

Create an org chart (create the top level)

1. From the navigation bar, click **Enterprise**.
2. Under Organization, click **Org Chart**.

The **Organization Units page** (page 262) opens.

3. In the organization level window, on Org Level 1, click .
4. Click **Add**.

Org Level 1 page (page 263) opens.

5. Complete the fields as appropriate.
6. Click **Add**.
7. Close the page.

The Organization Units page opens, and the top level of the org chart is shown.

Add org level 2 organization units to an org chart

1. From the navigation bar, click **Enterprise**.
2. Under Organization, click **Org Chart**.

The **Organization Units page** (page 262) opens.

3. Click the check box of the org chart.
4. Click **Properties**.

Org Level 1 page (page 263) opens.

5. In the Children section, click **Add**.
6. Search for and select the organization unit or units.
7. Click **Confirm**.
8. On the Org Level 1 page, click **Save** and close the page.

The org chart now contains the org level 2 organization unit or units you added.

Add subsequent org level organization units to an org chart

1. From the navigation bar, click **Enterprise**.
2. Under Organization, click **Org Chart**.

The **Organization Units page** (page 262) opens.

3. In the Organization Level window, beside an org level, click .
4. Type search criteria to find the organization unit that you want.
5. In the list beside an organizational unit, click  and then click **Properties**.

The **Org Level page** (page 263) opens.

6. In the Children section, click **Add**.
7. Search for and select the organization unit or units.
8. Click **Confirm**.
9. On the Org Level page, click **Save** and close the page.

The org chart now contains the org level organization unit or units you added.

Memberships

Memberships restrict or allow users to view information in Rival Learn. You can create memberships for:

- Training catalog items
- Course catalogs
- Checklist experts

For example, you may want to restrict a sales-centric course catalog to only sales staff in your organization or restrict a checklist so it can only be assessed by a specific user. You can easily do this with memberships.

Criteria control how membership restricts or allows access. The criteria are:

- Jobs
- Job Categories
- Groups
- Organizations
- Individual inclusion
- Individual exclusion

You can also use combinations of criteria to further limit or grant access. For example, you could create a membership to allow all sales staff except your West Coast division to view your sales-centric catalog. You would use the jobs and organization criteria to do this.

Memberships are created and maintained on the Membership Properties page.

Memberships page

Search

Clear

Name

Categories

Reference

Comment

Type

Memberships

Search

Add

Name	Reference	Comment	Type	
Customer Service			44	
Medical			44	
Management		Courses for Managers	44	
Sales			44	
Finance			44	
Sales		Sales team - course catalog	Course Catalog	
bwc manager membership			Course Catalog	
Sales1		For sales employees to view a course catalog	Course Catalog	

The Memberships page lists the memberships that are available in Rival Learn. On this page, you can:

- Search for memberships
- View properties for existing memberships
- Add memberships
- Delete memberships

Membership Properties page

MEMBERSHIP PROPERTIES

Add Refresh

QUALITY ASSURANCE

Expand All Collapse All

Name *

Reference

Comment

Categories

Assigned:

Available:

GL Training and Implementation

Type

Course Catalog

Course Catalogs

On this page, you define the properties for a membership.

Fields

Name: Type a name for the membership.

Reference: Type a reference for this item to make it easier to find in searches.

Comment: Type a comment to describe the membership.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Type: The membership you are creating applies to a specific Rival Learn type. Select one of the following:

- Training Catalog Item
- Course Catalog
- Expert Checklist

Training Catalog Items (If Type is Training Catalog Item): Determine the training catalog item or items to apply membership to. Click **Add** to search for and select them.

Course Catalog (if Type is Course Catalog): Determine the course catalog or catalogs to apply membership to. Click **Add** to search for and select them.

Expert Checklist (if Type is Expert Checklist): Determine the checklist or checklists to apply membership to. Click **Add** to search for and select them.

Membership Inclusion

Jobs: Click **Add** to search for and select jobs to add for membership inclusion.

Job Categories: Click **Add** to search for and select job categories to add for membership inclusion.

Groups: Click **Add** to search for and select groups to add for membership inclusion.

Organizations: Type part of an organization name to search for and select it to add for membership inclusion.

Individual Inclusion: Click **Add** to add one or more students to include in the membership definition.

Individual Exclusion: Click **Add** to add one or more students to exclude from the membership definition.

Add and define a membership for training catalog items

1. From the navigation bar, click **Enterprise**.
2. Under Organization, click **Memberships**.

The **Memberships page** (page 266) opens.

3. Click **Add**.

The **Membership Properties page** (page 266) opens.

4. Name the membership.
5. Type a reference and comment and assign categories if applicable.
6. In the Type field, select **Training Catalog Item**.
7. In the Training Catalog Items section, search for and select the training catalog item or items to apply membership to.

8. Provide membership inclusion based on jobs, job categories, groups, and/or organizations.
9. Include or exclude specific users.
10. Click **Add**.

Add and define a membership for a course catalog

1. From the navigation bar, click **Enterprise**.
2. Under Organization, click **Memberships**.
3. Click **Add**.

The **Membership Properties page** (page 266) opens.

4. Name the membership.
5. Type a reference and comment and assign categories if applicable.
6. In the Type field, select **Course Catalog**.
7. In the Course Catalogs section, search for and select the course catalog or catalogs to apply membership to.
8. Provide membership inclusion based on jobs, job categories, groups, and/or organizations.
9. Include or exclude specific users if applicable.
10. Click **Add**.

Add and define a membership for checklist assignments

1. From the navigation bar, click **Enterprise**.
2. Under Organization, click **Memberships**.
3. Click **Add**.

The **Membership Properties page** (page 266) opens.

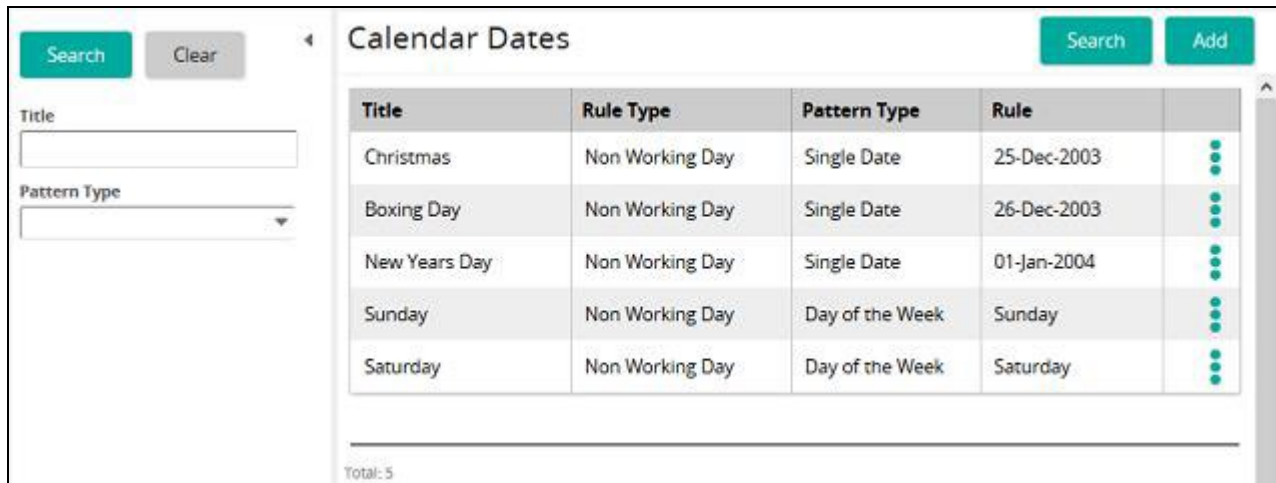
4. Name the membership.
5. Type a reference and comment and assign categories if applicable.
6. In the Type field, select **Checklist Expert**.
7. In the Checklist Assignments section, search for and select the checklist assignments or assignments to apply membership to.
8. Provide membership inclusion based on jobs, job categories, groups, and/or organizations.
9. Include or exclude specific users if applicable.
10. Click **Add**.

Calendar Dates

The Calendar Dates function allows administrators to define specific non-working days (Saturday and Sunday, for example) or specific named dates (Thanksgiving, New Year's Day, and so on) when training is normally not scheduled to occur.

Calendar dates affect how training events are scheduled in the system. Define global scheduling rules used by training events when dates are determined. Rival Learn flags any scheduling rule conflicts and/or modifies start dates based on conflicts when creating a training event.

Calendar Dates page



The screenshot shows the 'Calendar Dates' page. On the left, there is a search bar with 'Search' and 'Clear' buttons, and a 'Pattern Type' dropdown menu. The main area contains a table with the following data:

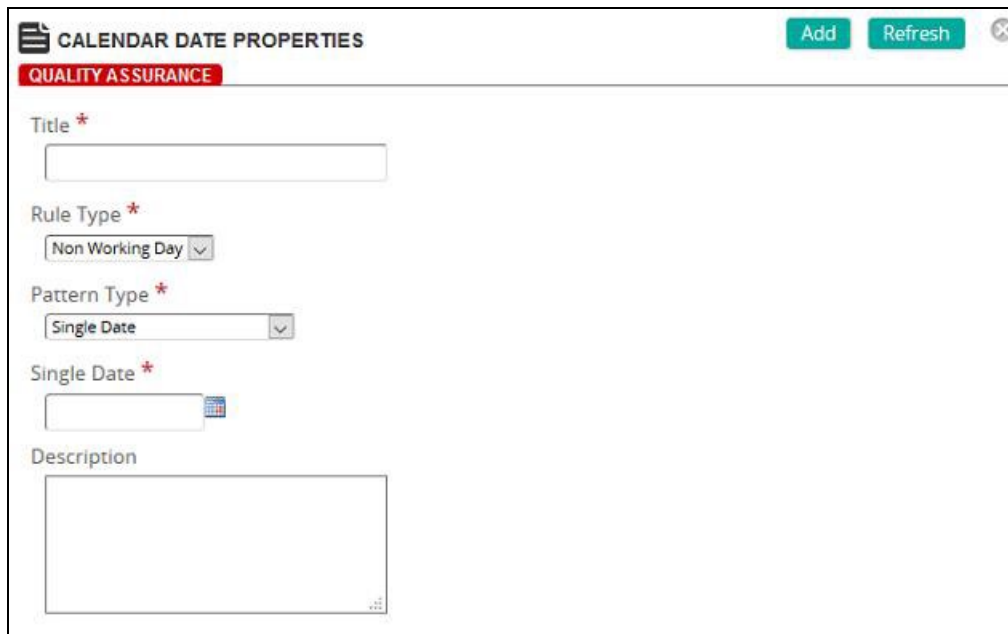
Title	Rule Type	Pattern Type	Rule
Christmas	Non Working Day	Single Date	25-Dec-2003
Boxing Day	Non Working Day	Single Date	26-Dec-2003
New Years Day	Non Working Day	Single Date	01-Jan-2004
Sunday	Non Working Day	Day of the Week	Sunday
Saturday	Non Working Day	Day of the Week	Saturday

At the bottom left of the table area, it says 'Total: 5'. On the right side of the table, there are three vertical ellipsis icons for each row, indicating options to edit or delete. At the top right of the page, there are 'Search' and 'Add' buttons.

The Calendar Dates page lists all the dates when training cannot be scheduled that have been setup in Rival Learn. On this page, you can:

- Search for existing calendar dates
- View properties for calendar dates
- Add a calendar date
- Delete a calendar date

Calendar Dates Properties page



The screenshot shows the 'CALENDAR DATE PROPERTIES' page. At the top, there are 'Add' and 'Refresh' buttons. Below them is a red banner that says 'QUALITY ASSURANCE'. The form contains the following fields:

- Title ***: A text input field.
- Rule Type ***: A dropdown menu with 'Non Working Day' selected.
- Pattern Type ***: A dropdown menu with 'Single Date' selected.
- Single Date ***: A date input field with a calendar icon.
- Description**: A large text area.

On this page, an administrator defines a non-working day or named date (such as a holiday) when no training can be scheduled. The fields vary depending on the rule type and pattern type selected.

Fields

Title: Type a name for the calendar date.

Rule Type: Select **Non Working Day** or **Named Date**.

Pattern Type: Select one of the following options:

- **Single Date:** A single date on the calendar.
- **Day of the Week:** Any day of the week (Sunday through Saturday).
- **Day of the Month:** Any day of the month (1 through 31).
- **Work Week:** A date that affects only Monday to Friday.
- **Full Week:** A date that affects the whole week.
- **Date Span:** Any date span with a start date and end date.

Description: Type a description for the date.

Single Date (Single Date selected): Click the calendar icon to select a specific date (day, month, and year).

Day of the Week (Day of the Week selected): Select the day of the week.

Day of the Month (Day of Month selected): Select the day of the month.

Apply Rule Forever (various pattern types selected): Select this option if the rule is to apply forever. If unselected, specify the rule start and end dates by selecting dates from a calendar pop-up.

Span Start Date (Date Span selected): Click the calendar icon to select a specific date (day, month, year) for the start date.

Span End Date (Date Span selected): Click the calendar icon to select a specific date (day, month, year) for the end date.

Add a blocked date to the calendar

1. From the navigation bar, click **Enterprise**.
2. Under Organization, click **Calendar Dates**.

The **Calendar Dates page** (page 269) opens.

3. Click **Add**.

The **Calendar Date Properties page** (page 269) opens.

4. Provide a title for the blocked date.
5. From the Rule Type drop-down box, select **Non Working Day** or **Named Date**.
6. From the Pattern Type drop-down box, select a pattern type.
7. Complete the remaining fields as appropriate.
8. Click **Add**.

Global calendar

The global calendar displays blocked dates when training will not occur (holidays, special events, and so on) within an organization, normal training week, and normal training hours. It serves as a visual reminder when scheduling training using the Planning Board.

You can use the navigation features at the top of the calendar to move to a specific month and year. You can also quickly navigate back to today's date.

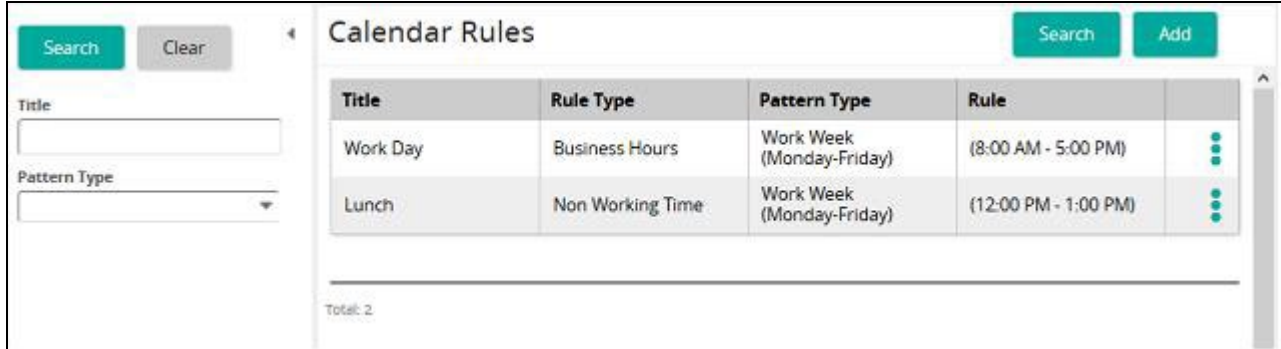
View the global calendar

1. From the navigation bar, click **Enterprise**.
- Under Organization, click **Global Calendar**.

Calendar Rules

Calendar rules are used to block off non-working time or define normal business hours that are applied to all training event schedules across the enterprise.

Calendar Rules page



The screenshot shows the 'Calendar Rules' page. On the left, there is a search bar with 'Search' and 'Clear' buttons, and a 'Pattern Type' dropdown menu. The main area contains a table with the following data:

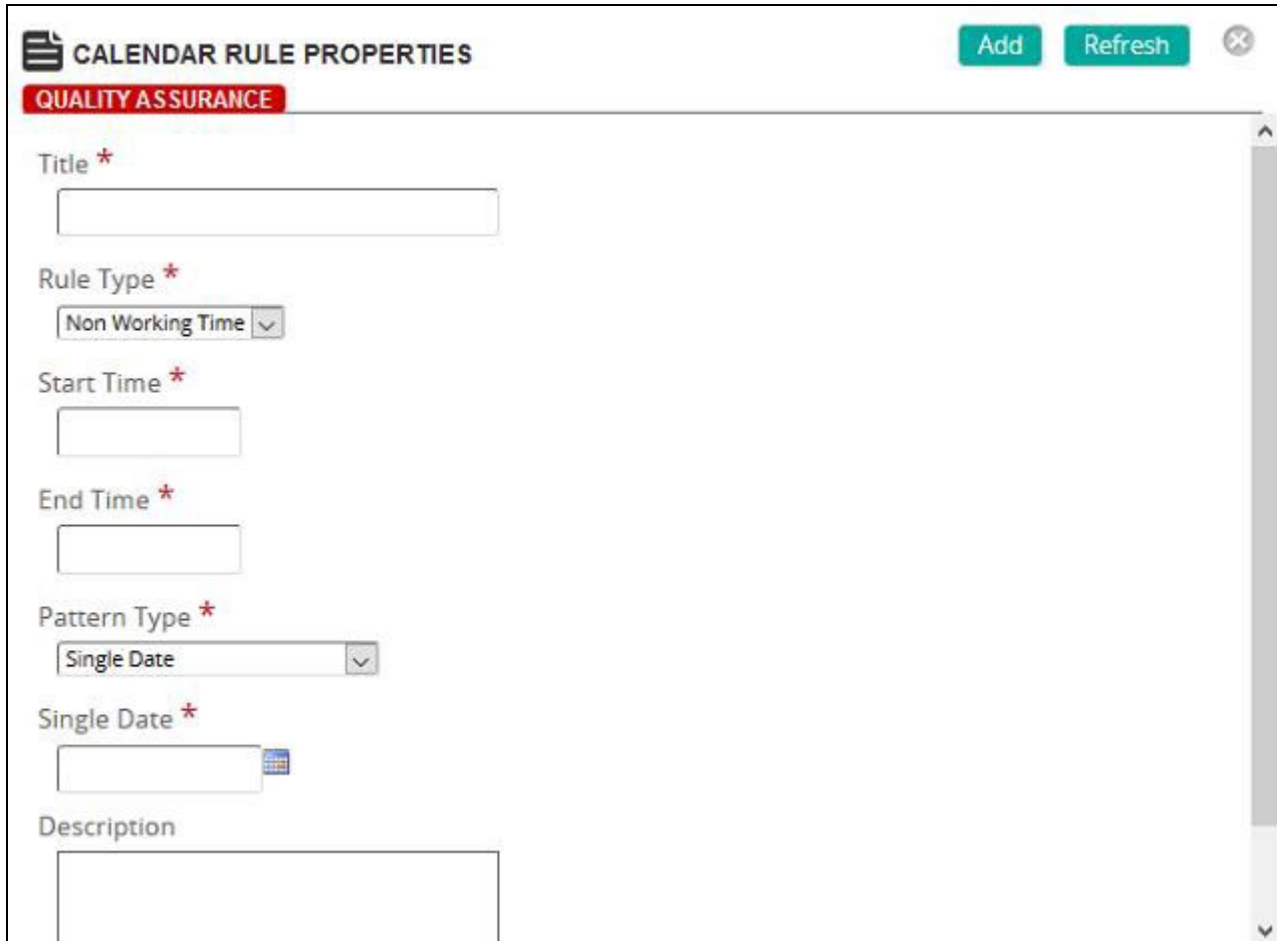
Title	Rule Type	Pattern Type	Rule	
Work Day	Business Hours	Work Week (Monday-Friday)	(8:00 AM - 5:00 PM)	⋮
Lunch	Non Working Time	Work Week (Monday-Friday)	(12:00 PM - 1:00 PM)	⋮

Below the table, it says 'Total: 2'. On the right side of the table, there are 'Search' and 'Add' buttons.

The Calendar Rules page lists all the calendar rules that have been setup in Rival Learn. On this page, you can:

- Search for existing calendar rules
- View properties for calendar rules
- Add a calendar rule
- Delete a calendar rule

Calendar Rule Properties page



CALENDAR RULE PROPERTIES Add Refresh

QUALITY ASSURANCE

Title *

Rule Type *

Non Working Time

Start Time *

End Time *

Pattern Type *

Single Date

Single Date *

Description

On this page, an administrator defines non-working time or normal business hours that are applied to all training event schedules across the enterprise. The fields vary depending on the rule type and pattern type selected.

Fields

Title: Type a name for the calendar date.

Rule Type: Select **Non Working Time** or **Business Hours**.

Start Time: Type the hour and minutes and from the drop-down box, select **AM** or **PM**.

End Time: Type the hour and minutes and from the drop-down box, select **AM** or **PM**.

Pattern Type: Select one of the following options:

- **Single Date:** A single date on the calendar.
- **Day of the Week:** Any day of the week (Sunday through Saturday).
- **Day of the Month:** Any day of the month (1 through 31).
- **Work Week:** Affects only Monday to Friday.
- **Full Week:** Affects the whole week.
- **Date Span:** Any date span with a start date and end date.

Description: Type a description for the date.

Single Date (Single Date selected): Click the calendar icon to select a specific date (day, month, and year).

Day of the Week (Day of the Week selected): Select the day of the week.

Day of the Month (Day of Month selected): Select the day of the month.

Apply Rule Forever (various pattern types selected): Select this option if the rule is to apply forever. If unselected, specify the rule start and end dates by selecting dates from a calendar pop-up.

Span Start Date (Date Span selected): Click the calendar icon to select a specific date (day, month, year) for the start date.

Span End Date (Date Span selected): Click the calendar icon to select a specific date (day, month, year) for the end date.

Create a calendar rule

1. From the navigation bar, click **Enterprise**.
2. Under Organization, click **Calendar Rules**.

The **Calendar Rules page** (page 271) opens.

3. Click **Add**.

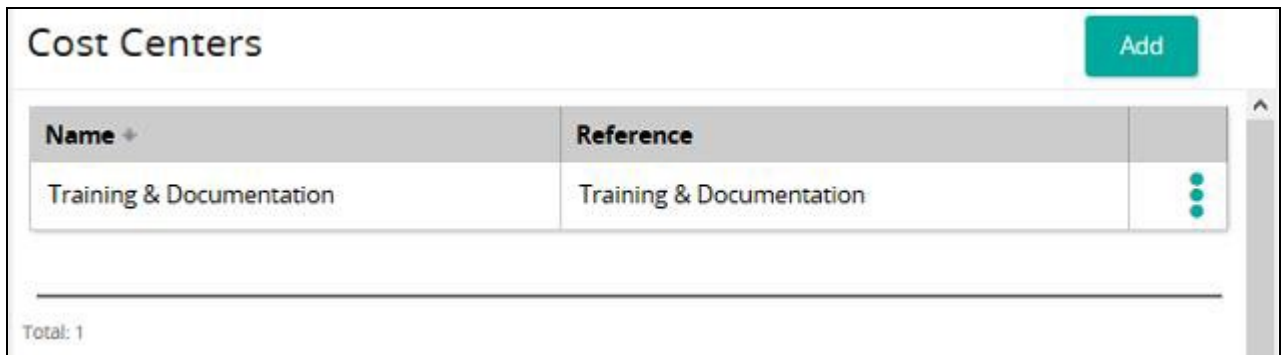
The **Calendar Rule Properties page** (page 272) opens.

4. Provide a title for the calendar rule.
5. From the Rule Type drop-down box, select **Non Working Time** or **Business Hours**.
6. From the Pattern Type drop-down box, select a pattern type.
7. Complete the remaining fields as appropriate.
8. Click **Add**.

Cost centers

Cost centers are used to track expenditures and charges for training activities for reporting purposes. Cost centers are typically created through an HR import.

Cost Centers page



Name +	Reference	
Training & Documentation	Training & Documentation	⋮

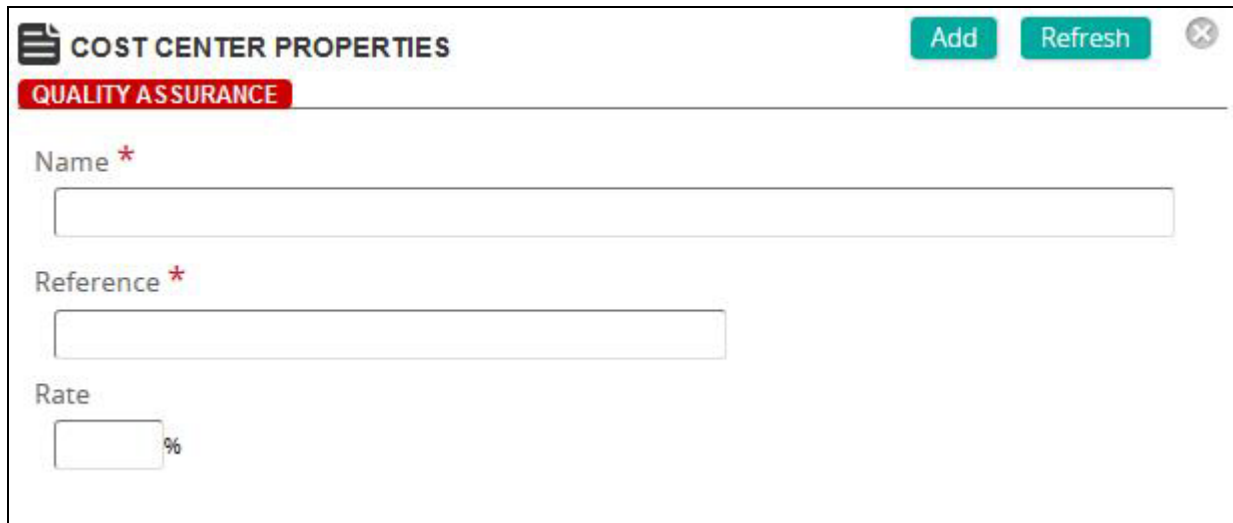
Total: 1

The Cost Centers page shows all of the cost centers available in Rival Learn. On this page, you can:

- Add a cost center
- View properties for existing cost centers

- Delete a cost center

Cost Center Properties page



On the Cost Center Properties page, an administrator defines properties for a cost center.

Fields

Name: Type the name of the cost center.

Reference: Type a reference for this item to make it easier to find in searches.

Rate: Type a rate percentage.

Add a cost center

1. From the navigation bar, click **Enterprise**.
2. Under Organization, click **Cost Centers**.

The **Cost Centers page** (page 273) opens.

3. Click **Add**.

The **Cost Center Properties page** (page 274) opens.

4. Complete the fields as appropriate.
5. Click **Add**.

Certification Types

Certification types are used to define certification and recertification time periods as well as the mastery mark for any defined competency, requirement, or intervention (training activity, eCourse, exam, or assignment) in the system. Certification types can then be used as presets to determine the certification, recertification, and mastery settings for any qualification condition.

Name: Type a name for the certification type.

Certification Rules

Certification Period: To define a certification, enter a value (in days or months). The default value is set to 0 (zero). Enter a value in this field if students are required to successfully complete the intervention (or competency or requirement) within the certification time period entered from the student's membership date. For example, if users are required to complete an intervention within the first 6 months from membership start, enter 6 months here.

Note: Defining the certification period and recertification period as zero (0) means the qualification is required but no time limits for obtaining certification are required.

Activation Period: The amount of time prior to certification expiration when a qualification certification (requirement, competency, eCourse, training activity, exam, or assignment) will appear in the My Training page for the student. Enter a value (in days, months, or years) to set this time period.

Note: The default value is set to 0 (zero). This results in the intervention appearing on the My Training Page immediately.

Recertification Rules

Recertification Method: Select one of the following options:

- **None**
- **Mastery Date:** Recertification due dates are calculated based on the Mastery Date for a certification record.
- **Fixed Period:** Recertification due dates are calculated based on the mastery date for a certification record and its relationship to a fixed base due date, recertification period, and reactivation period defined for the certification.

Recertification Period: Enter a value to require users to renew current certifications. For example, if users are to renew a certification every two years, enter 2 and select Years from the drop-down box.

Reactivation Period: This is the time before recertification expiration when a qualification intervention (eCourse, training activity, exam, or assignment) will appear in the My Training page for the student. Enter a value (in days, months, or years) to set this time period.

If a course has a recertification period set to be three years, once the student has met the qualification, the course no longer appears on the student's My Training page. Setting the reactivation period to be 90 days forces the course to the student's My Training page 90 days before the recertification is due.

If the Recertification Period and the Reactivation Period are set to be equal and not zero (0), the course remains on the student's My Training page.

Based Due Date (Fixed Period selected): Click to select a date from the calendar pop-up. See **Fixed Period recertification example** (on page 278) for details.

Other Settings

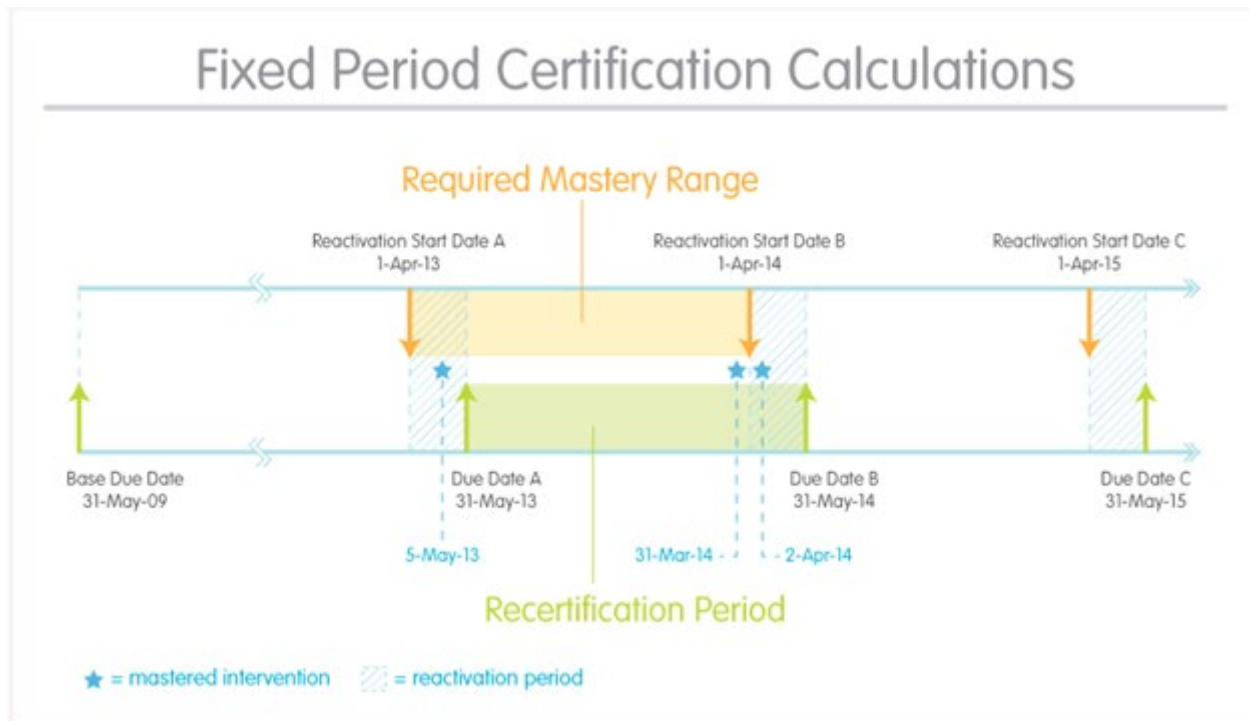
Required Mark: The mark required to meet the condition for the qualification. This mark overrides any company default mastery setting. If you do not enter a value here, the company default is used.

Fixed Period certification calculations

A Fixed Period Recertification is shown in the following example. Note that the:

- Base Due Date is 31 May 2009
- Recertification Period is 1 year

- Reactivation Period is 60 days



Mastered intervention scenarios

Let's say that current Due Date is A (31 May 13). In this scenario:

- If a user completes the intervention within the Required Mastery Range (between Reactivation Start Date A and Reactivation Start Date B), the next Due Date becomes B (31-May-14).
- Multiple mastery records of the same or an equivalent intervention, within the same Required Mastery Range, do not modify the Due Date. Due Date remains B (31-May-14).
- If user completes the intervention or an equivalency in the next Required Mastery Range (between Reactivation Start Date B and Reactivation Start Date C), the next Due Date becomes C (31-May-15).

Fixed Period recertification example

The following sample illustrates how the Base Due Date defines a recursive cycle of recertification due dates based on the defined fixed date. Consider the following recertification settings in a qualification.


Certification Rules

Certification Period

Activation Period


Recertification Rules

Recertification Method

Base Due Date *

Recertification Period

Reactivation Period

With a Base Due Date starting on 01 Nov 2010, the following provides an example of a time line of the Base Due Dates that this Fixed Period recertification rule will be for a user who becomes a member of this qualification on June 1 2011. The user would be required to certify on or before 01 July 2011, 30 days after membership. If this user then completed his initial certification on 30 June 2011, their next due date (recertification due date) would be 01 Nov 2011:

Fixed Base Due Date (Current Due Date)	Reactivation Date	Required Mastery Range	Next Fixed Due Date	Description
01 July 2011 (30 days after membership)	01 Aug 2011 (60 days before Due Date)	01 Aug 2010 01 Aug 2011	01 Nov 2011 (1 year after Base Due Date)	This is the first base period that any existing users would begin their recertification, if they became a member of this Qualification any time between 01 Aug 2010 and 01 Aug 2011

With a current due date of 01 Nov 2011, this user must recertify on or after 01 Aug 2011 (current Fixed Period Reactivation Date) and before 01 Aug 2012 (next Fixed Period Reactivation Date). If this user then completed his recertification on 28 October 2011, their next due date (Fixed Period Recertification Due Date) would be 01 Nov 2012:

Fixed Base Due Date (Current Due Date)	Reactivation Date	Required Mastery Range	Next Fixed Due Date	Description
01 Nov 2011 (1 year after Base Due Date)	01 Aug 2011 (60 days before current Due Date)	01 Aug 2011 01 Aug 2012	01 Nov 2012 (1 year after Current Due Date)	This is the second base period calculated based on a user completing recertification anytime within the Required Mastery Range

Required Mastery Range is defined as any date that falls between the Current Reactivation Date for one base period and the Reactivation Date for the Next Fixed Base Due Date

Consider the following Qualification Certification settings:

Certification Rules

Certification Period
 Day(s)

Activation Period
 Day(s)

Recertification Rules

Recertification Method

Base Due Date *

Recertification Period
 Day(s)

Reactivation Period
 Day(s)

The following table provides a timeline for a new student user who becomes a member of this Qualification Certification for the first time on 08 Feb 2011:

Current Date	Mastery Date	Fixed Base Due Date	Status	Description
08 Feb 2011	---	10 Mar 2011	NOT MET	Initial status for this user when hired on 08 Feb 2011 would be NOT MET. They would have until 10 Mar 2011 (30 days) to complete their first certification
28 Feb 2011	28 Feb 2011	01 May 2011	MET	User MET the certification and is now required to recertify on the next Recertification Base Due Date, 01 May 2011. They completed their initial certification within the Required Mastery Range of 01 Jan 2011 and 31 Mar 2011.

Current Date	Mastery Date	Fixed Base Due Date	Status	Description
08 Feb 2011	---	10 Mar 2011	NOT MET	Initial status for this user when hired on 08 Feb 2011 would be NOT MET. They would have until 10 Mar 2011 (30 days) to complete their first certification
01 Jul 2011	28 Feb 2011	01 May 2011	EXPIRED	This student user is now EXPIRED as they have not mastered their Recertification within the Required Mastery Range for the Base Due Date (31 Mar 2011 and 01 Jul 2011)
15 Aug 2011	15 Aug 2011	01 Nov 2011	MET	This student user then completes the recertification late. Their mastery date is within the Required Mastery Range for the 01 Aug 2011 Fixed Base Due Date, so their next Due Date becomes 01 Nov 2011.
01 Oct 2011	01 Oct 2011	01 Feb 2012	MET	This student user now completes the recertification within the Required Mastery Range for their current Due Date of 01 Nov 2011, so their next Due Date becomes 01 Feb 2012.
01 Feb 2012	01 Oct 2011	01 Feb 2012	EXPIRED	This student user is now EXPIRED as they have not mastered their Recertification within the Required Mastery Range for the Base Due Date (01 Oct 2011 01 Jan 2012)
10 Jul 2012	10 Jul 2012	01 Nov 2012	MET	This student user then completes the recertification late. Their mastery date is within the Required Mastery Range for the 01 Aug 2012 Fixed Base Due Date, so their next Due Date becomes 01 Nov 2012.

Changing from end of calendar year rule to fixed period recertification method

Rival Learn includes a Qualification rule that allowed setting a Certification or Recertification as "Valid to end of Calendar Year". This rule is no longer available and has been replaced with the Fixed Period Recertification method. Any existing Certification or Recertification rules that were using this setting will be converted to a "Mastery" Recertification method. Your previous recertification rules will need to be reviewed and reconfigured to use a "Fixed Period" Recertification method if desired.

To reconfigure your old "Valid to end of Calendar Year" certifications, you will need to select "Fixed Period" as the recertification method and then select a Base Due Date as the start date for your recertification cycle.

Create a certification type

1. From the navigation bar, click **Enterprise**.
2. Under Organization, click **Certification Types**.

The **Certification Types** page (page 275) opens.

3. Click **Add**.

The **Certification Type Properties page** (page 275) opens.

4. In the Name box, type the name of the certification.

Certification Rules provide the ability to define the initial certification period and the activation period. The due date is calculated based on the student effective date plus the certification period.

5. In the Certification Period text box, type a value for the certification period. From the drop-down box, select the duration in **Days, Months, or Years**. No time limits would only be true if the Certification period were set to null.

Defining a Certification Period of zero (0) means the Qualification is required, but no time limits for obtaining certification are required.

The Activation period determines when Rival Learn activates the certification. The activation date is calculated based on the due date minus the activation period.

6. In the Activation Period text box, type a value for the activation period. From the drop-down box, select the duration in **Days, Months, or Years**.
7. In the **Recertification Method** drop-down box, select one of the following:
 - **None**
 - **Mastery Date**
 - **Fixed Period**

Defining a Recertification Period to None means there is no recertification required. Only certification rules apply.

Other settings provide the ability to define a required mark for the certification.

8. In the **Required Mark** text box, type value required to meet the condition for the qualification.
9. Click **Add**.

Admin

The Administration tab contains sub tabs where all administrators, their security settings, workgroup privileges, and other company settings are defined.

Administrators

Administrators can be added to perform various roles within the Rival Learn Console. Their access privileges are based upon their *individual* or *workgroup* security settings. Any Rival Learn user (administrator or instructor) is termed an administrator with the exception of student user.

Data View Restrictions

Data View Restrictions can be assigned to Administrators or to Workgroups to restrict viewing access to specific data fields in an Enterprise based on the combination of Job, Student Group, Category, or Organizational Unit of a student; the Supervisor/Subordinate relationship; and/or the Category for other objects in the Enterprise.

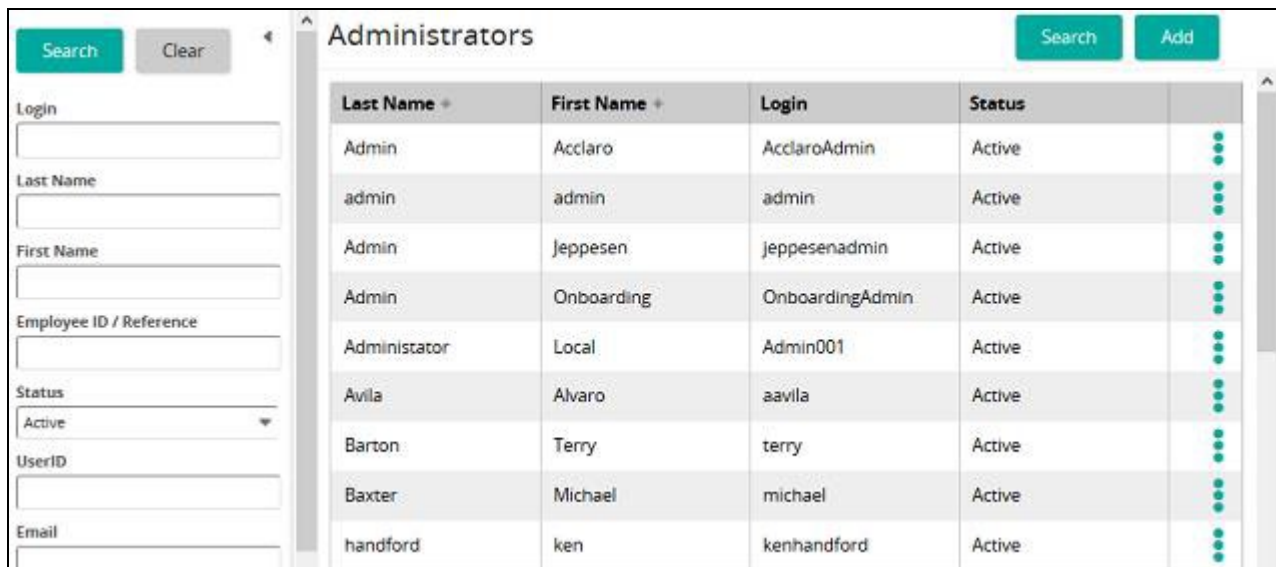
Data View Restrictions work like data filters. They can be used to restrict access for either students or content. For example:

- Administrators can only view those students whose combination of Job, Group, Category, and Organizational Unit match the filter set as a Data View Restriction for the Administrator or the restriction inherited by the WorkGroup assignment of the Administrator.
- Supervisors may only view data for their immediate subordinates or all subordinates of subordinates.
- Administrators can only view content categorized against a restricted content category.

If the Administrator belongs to an administrative workgroup or workgroups, the criteria restrictions from their workgroup membership will appear in the Inherited Groups field. Similarly if categories are associated to the Administrator through the workgroups, the associated categories will appear in the Inherited Category field.

It is recommended to assign data view restrictions and privileges using workgroups and not individuals, as it is easier to manage.

Administrators page

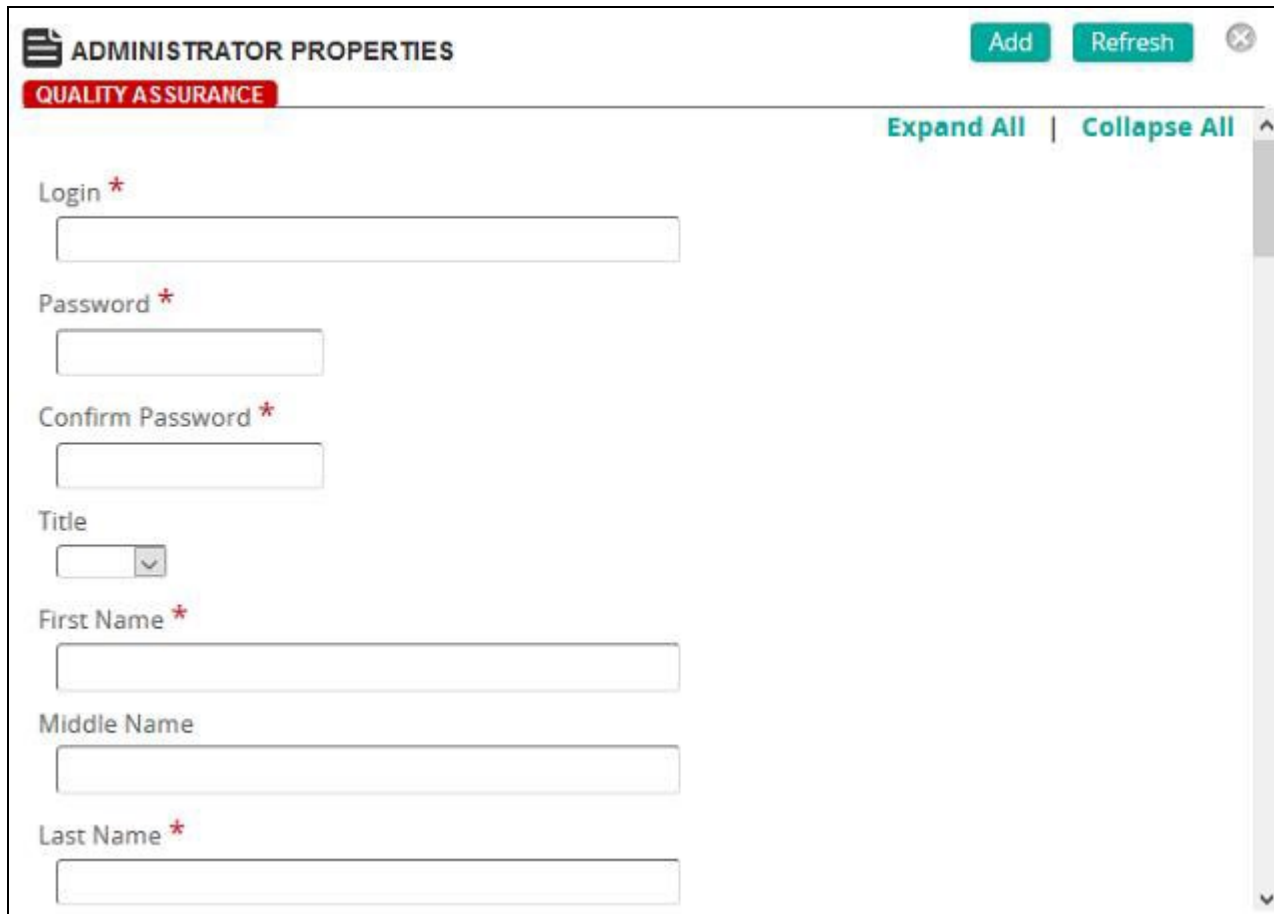


Last Name +	First Name +	Login	Status	
Admin	Acclaro	AcclaroAdmin	Active	⋮
admin	admin	admin	Active	⋮
Admin	Jeppesen	jeppesenadmin	Active	⋮
Admin	Onboarding	OnboardingAdmin	Active	⋮
Administrator	Local	Admin001	Active	⋮
Avila	Alvaro	aavila	Active	⋮
Barton	Terry	terry	Active	⋮
Baxter	Michael	michael	Active	⋮
handford	ken	kenhandford	Active	⋮

The Administrators page lists Rival Learn users who have been set up as administrators. On this page, you can:

- Search for administrators
- View properties for existing administrators
- Add administrators
- Delete administrators

Administrator Properties page



ADMINISTRATOR PROPERTIES Add Refresh

QUALITY ASSURANCE Expand All | Collapse All

Login *

Password *

Confirm Password *

Title

First Name *

Middle Name

Last Name *

On this page, you define properties for an administrator.

Fields

Login: Type a login ID.

Password: Type a password.

Confirm Password: Re-type the password you entered in the Password box.

Title: Select a title.

First Name: Type the first name of the administrator.

Middle Name: Type the middle name of the administrator.

Last Name: Type the last name of the administrator.

Full Name: Type the full name of the administrator.

Email: Type the email address of the administrator.

Force Profile update on next login: Select this check box to force the administrator to update profile at next login.

Authentication

Use External Authentication: If you want to use external authentication, select this check box.

Force Password Change on next login: To force a password change for the user on the next login, select this check box.

Security Settings: Click this button to restrict viewing access to specific data fields in an enterprise based upon individual or workgroup security settings.

Preferences

Language Preference: The language the user prefers to use for communications.

Email Format: The default email format. The options are:

- (use default): Pulls in the default email format that is set on the Company settings page (Default Email Format setting) and renders email accordingly.
- HTML: Renders email as HTML text.
- Plain Text: Renders email as plain text.

Organizational

Employee ID/Reference: Type a unique identifier for the user.

Start Date: Click the box or calendar icon to select a start date. This date is typically the date the user is added in Rival Learn.

Termination Date: If the user no longer needs access to Rival Learn (such as when terminating employment), click the box or calendar icon to select a termination date.

Status: Select **Active** or **Inactive**. A user that is inactive in Rival Learn cannot access any information.

Status Description: Type any additional information to describe the user's status such as retired, on leave, and so on.

Contact Information

Enter any additional contact information if required.

Personal Information

Birthdate: Click the box or calendar icon to select the user's birthday from a calendar pop-up.

Gender: Select the user's gender from the list.

Notes: Type any additional notes if applicable.

Add an administrator

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Administrators**.

The **Administrators page** (page 282) opens.

3. Click **Add**.

The **Administrator Properties page** (page 283) opens.

4. Complete the fields as appropriate.
5. Click **Add**.

Workgroups

Workgroups are used to:

- Define and organize administrator security settings (privileges) and data view restrictions
- Identify instructor workgroups linked to proctored exams

Although settings can be customized for an individual administrator or instructor, it is useful to assign them at a workgroup level. Security and data view restriction settings are automatically assigned to the administrators or instructors based on their workgroup membership.

Workgroups page

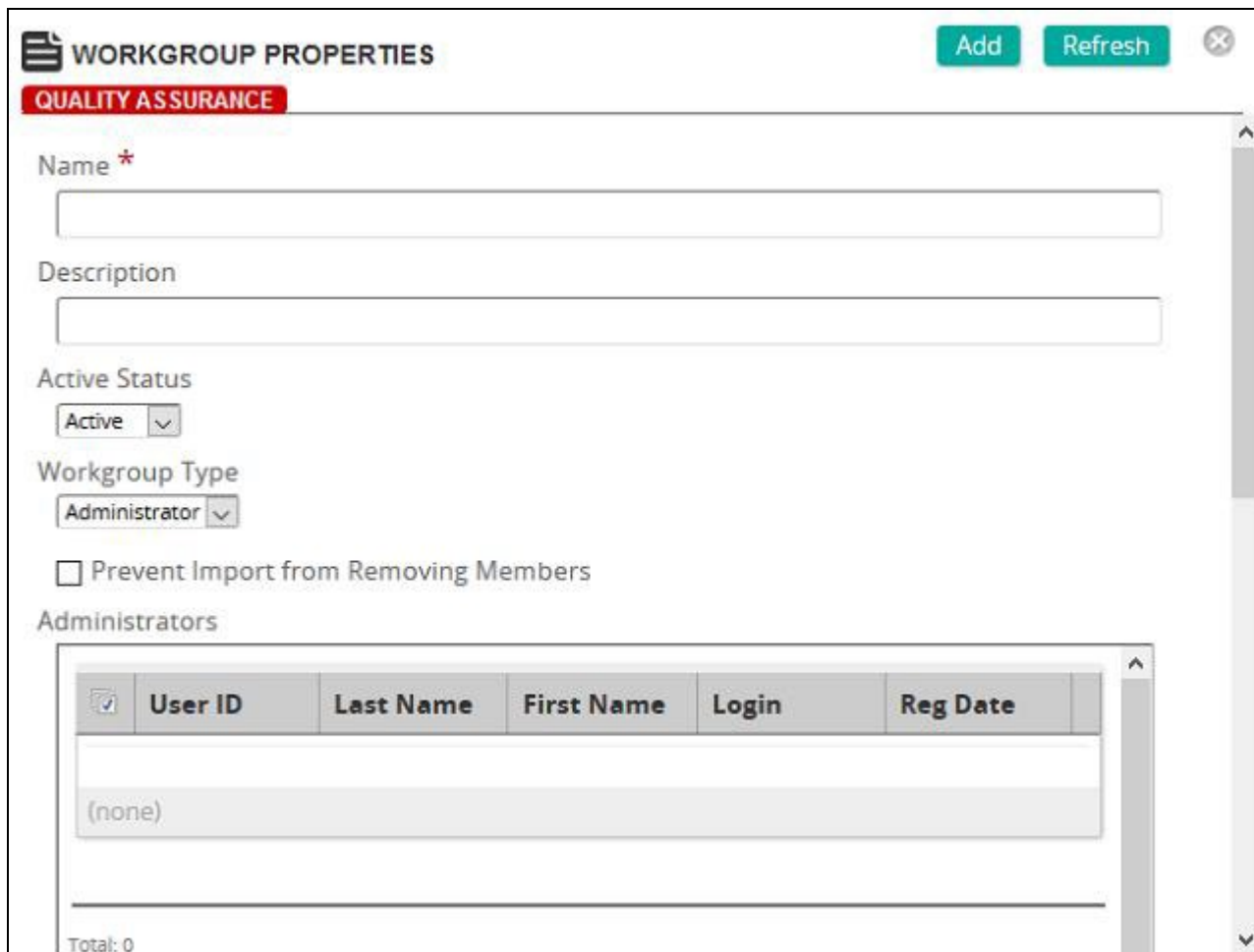


Name	Workgroup Type	Members Removed by Import	Total Members	
Pep Boys Administrators	Administrator	Yes	0	
Local Administrators	Administrator	Yes	2	
System Administrators	Administrator	Yes	5	
External Client	Administrator	Yes	0	
Media Asset Manager	Administrator	Yes	5	
Kaplan Content Developers	Administrator	Yes	1	

The Workgroups page lists the workgroups that have been set up in Rival Learn. On this page, you can:

- Search for workgroups
- View properties for existing workgroups
- Add workgroups
- Copy workgroups
- Delete workgroups

Workgroup Properties page



On this page, you define the properties for a workgroup.

Fields

Name: Type the name of the workgroup.

Description: Type a description for the workgroup.

Active Status: Select **Active** or **Inactive**.

Note: Inactive workgroups ignore any administrator or instructor memberships and will not apply any privileges or data view restrictions to any workgroup members. When new workgroups are created via an import, Rival Learn automatically sets the workgroup status to Inactive.

Workgroup Type: Select the type of workgroup to create. Select **Administrator** or **Instructor**. The selection you make controls whether the Administrator or Instructors list appears below.

Prevent Import from Removing Members: Select this check box to prevent users from being automatically removed from all workgroups not identified in the import data.

Administrators (Administrator selected in Workgroup Type box): Shows the administrators included in the workgroup. Click **Add** to search for and add administrators to the workgroup, **Remove Selected** to remove the selected administrator from the workgroup, or **Mark All** to mark all administrators for removal.

Instructors (Instructors selected in Workgroup Type box): Shows the instructors included in the workgroup. Click **Add** to search for and add instructors to the workgroup, **Remove Selected** to remove the selected instructor from the workgroup, or **Mark All** to mark all instructors for removal.

Workgroup in Role Selector: Select one of the following options:

- **Combined and Selectable:** Users can access the Admin Portal using a combined role or have the ability to select a specific role, if available.
- **Combined Only:** Removes individual roles from the selection list and forces users to only use their combined role.
- **Selectable Only:** Removes the combined ability and applies privileges only when selected.

Security Settings: If applicable, set up data view restrictions.

Shortcut Tabs: Shows shortcut tabs for the workgroup. Click **Add** to search for and add shortcuts, **Remove Selected** to remove the selected shortcut, or **Mark All** to mark all shortcuts for removal from this workgroup.

Add a workgroup

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Workgroups**.

The **Workgroups page** (page 285) opens.

3. Click **Add**.

The **Workgroup Properties page** (page 286) opens.

4. Name the workgroup and provide a description.
5. Select a status.
6. Select **Administrator** to create an administrator workgroup or **Instructor** to create an instructor workgroup.
7. Complete the remaining fields as appropriate.
8. (If applicable) **Define a shortcut** (on page 288).
9. Click **Add**.

Combining workgroup roles

When an administrator user has membership in more than one workgroup, each role's data view restrictions and permissions are determined prior to being combined.

In combination they have VIEW access restricted to Students that are a member of Group 1 and NO ACCESS to VIEW the Students tab in Role 2. The resulting data will be that they will not see any users that are members of Group 2 on the Students tab.

In combination they can VIEW and Delete users that are members of Group 1 from the Students tab but only the ability to VIEW students that are members of Group 2. The delete button is only available to students in group one on a row by row basis in the Students tab.

Unrestricted roles

An important factor in computing a role combination is UNRESTRICTED data. By default, when a new administrator or workgroup is created, users do not have an Data View Restrictions. This allows them to see any data in the system where access has been granted by privileges.

When combined, Role 1 becomes irrelevant. This administrator is able to view data on the Student tab and have unrestricted access to student data because they are able to do that in a selected role.

Set privileges for a workgroup

- Privileges control what users in a workgroup can do.

- From the navigation bar, click **Enterprise**.
- Under Admin, click **Workgroups**.

The **Workgroups page** (page 285) opens.

- In the list beside a workgroup, click  and then click **Properties**.
- Click **Security Settings**.

The Workgroup Properties page opens.

- In the Privileges section, select the privileges.
- Click **Save**.

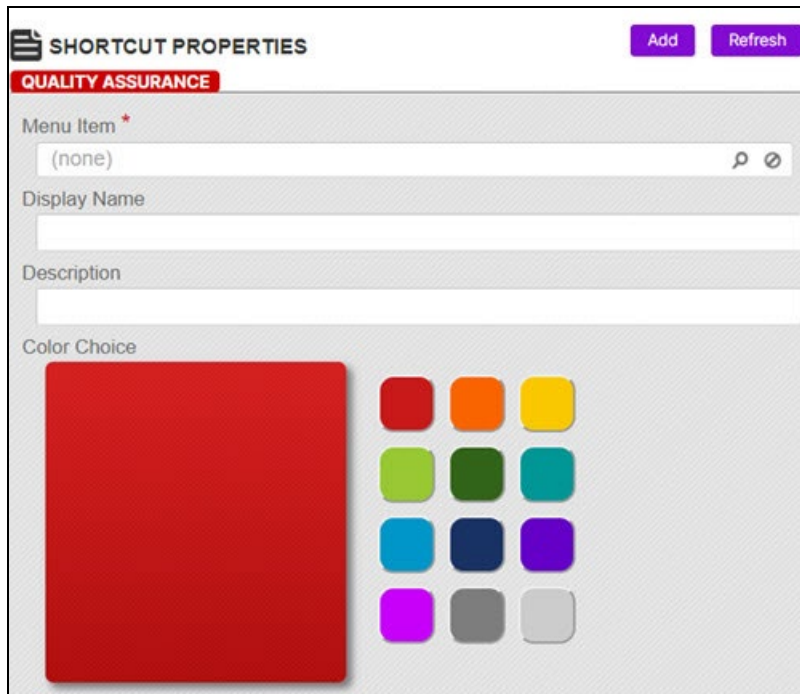
Define a shortcut

Shortcuts appear as tiles on the Admin homepage and are dynamically displayed based on all workgroup memberships. You do not have to select the specific workgroup role to be able to view the associated shortcuts. Selecting a shortcut tile or selecting a shortcut menu item automatically navigates to the Admin location defined for the shortcut.

To define a shortcut for a workgroup, perform the following steps:

- On the Workgroup Properties page, from Shortcuts, click **Add**.

The Shortcut Properties page opens.



SHORTCUT PROPERTIES Add Refresh

QUALITY ASSURANCE

Menu Item *
(none)

Display Name

Description

Color Choice

Color swatches: Red, Orange, Yellow, Green, Dark Green, Teal, Light Blue, Dark Blue, Purple, Magenta, Grey, White.

2. In the Menu Item box, search for and select a tab path.
3. In the Display Name box, type a name for the shortcut.
4. In the Description box, type a description for the shortcut title.
5. Select a display color.
6. Click **Save**.

Copy a workgroup

Note: Any workgroup created using the copy function is set to inactive until set to active. Inactive workgroup privileges copy and data view restrictions are ignored by Rival Learn for all user memberships.

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Workgroups**.

The **Workgroups page** (page 285) opens.

3. Search for the workgroup that you want to copy.
4. In the list beside a workgroup, click  and then click **Copy**.
5. Click **OK** to confirm.

Users

Users can be created in Rival Learn and then assigned roles based on whether they are an administrator, student, instructor, or expert. Users are created on the Users page.

Note: Any Rival Learn user (administrator or instructor), with the exception of student user, is termed an administrator.

Users page

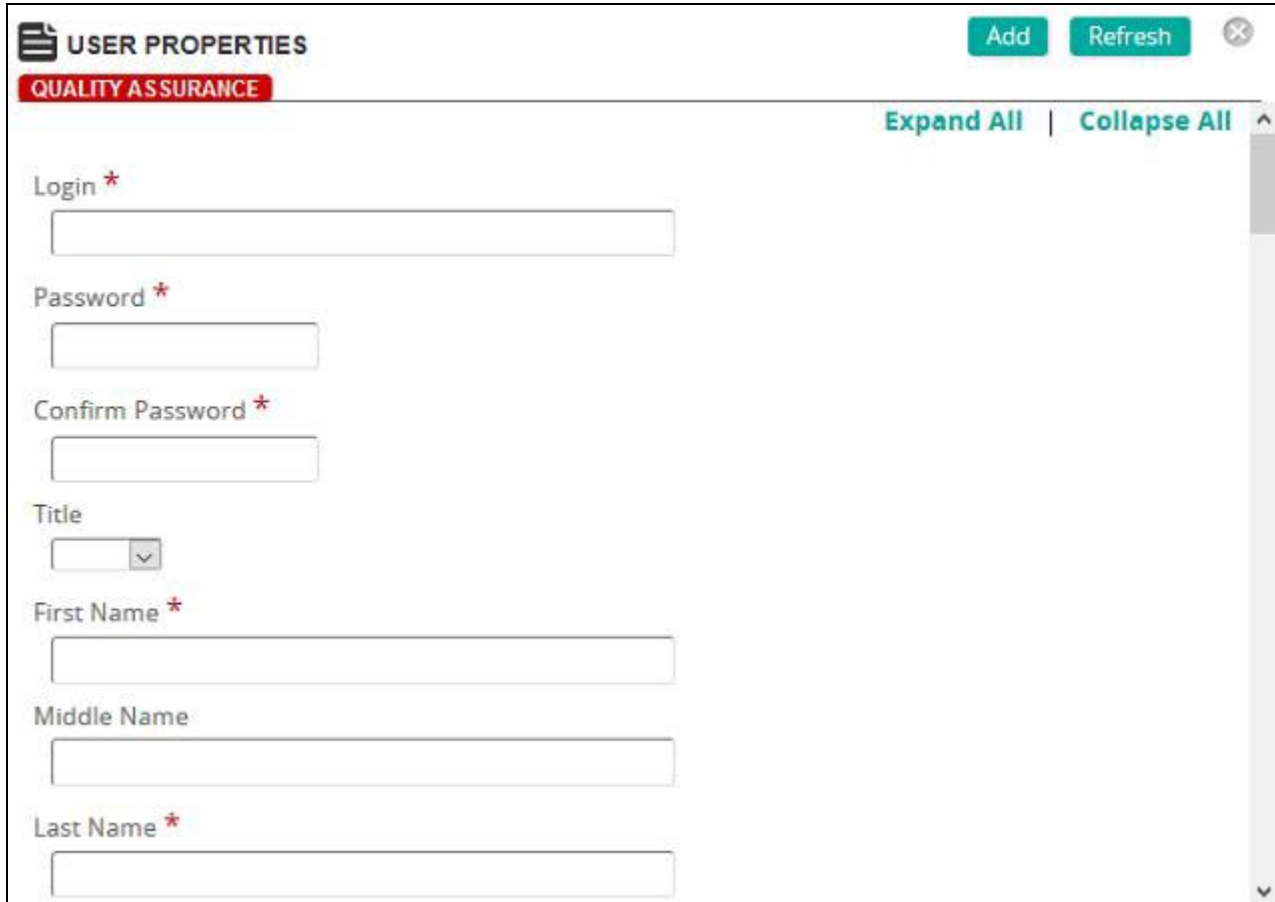
Users						
UserID	Last Name	First Name	Login	Status	Student	Adminis
2264		ecomuser1	ecomuser1	Active	Yes	No
2251		srttest	srttest	Active	Yes	No
2298	1One	Student1	Student1	Active	Yes	No
2299	2Two	Student2	Student2	Active	Yes	No
2300	3Three	Student3	Student3	Active	Yes	No
2301	4Four	Student4	Student4	Active	Yes	No
2302	5Five	Student5	Student5	Active	Yes	No
2303	6Six	Student6	Student6	Active	Yes	No
2252	Admin	Acclaro	AcclaroAdmin	Active	No	Yes

The Users page lists users who have been set up in Rival Learn. On this page, you can:

- Search for users

- View properties for existing users
- Add users
- Delete users

User Properties page



The screenshot shows a web application window titled "USER PROPERTIES". In the top right corner, there are two buttons: "Add" and "Refresh", and a close button (X). Below the title bar, there is a red banner with the text "QUALITY ASSURANCE". To the right of the banner, there are two links: "Expand All" and "Collapse All". The main form area contains several input fields with labels and asterisks indicating required fields:

- Login ***: A text input field.
- Password ***: A text input field.
- Confirm Password ***: A text input field.
- Title**: A dropdown menu.
- First Name ***: A text input field.
- Middle Name**: A text input field.
- Last Name ***: A text input field.

On this page, you define properties for a user.

Fields

Login: Type a login ID.

Password: Type a password.

Confirm Password: Re-type the password you entered in the Password box.

Title: Select a title.

First Name: Type the first name of the user.

Middle Name: Type the middle name of the user.

Last Name: Type the last name of the user.

Full Name: Type the full name of the user.

Email: Type the email address of the user.

Force Profile update on next login: Select this check box to force the administrator to update profile at next login.

Authentication

Use External Authentication: If you want to use external authentication, select this check box.

Force Password Change on next login: To force a password change for the user on the next login, select this check box.

User Roles

User Roles: Select the check box of the appropriate user role for the user.

- **Administrator:** This user role allows access to the Administrator Portal.
- **Student:** This user role allows access to the Student Portal but not the Administrator Portal.
- **Expert:** This user role allows a user to associate, launch, and assess a checklist for any student (via the Assess Checklist tile) in the Student Portal.
- **Instructor:** This user role defines a user as an instructor.

Tip: When creating a new user, the user must have at least an administrator or student role.

Preferences

Language Preference: The language the user prefers to use for communications.

Email Format: The default email format. The options are:

- (use default): Pulls in the default email format that is set on the Company settings page (Default Email Format setting) and renders email accordingly.
- HTML: Renders email as HTML text.
- Plain Text: Renders email as plain text.

Organizational

Employee ID/Reference: Type a unique identifier for the user.

Start Date: Click the box or calendar icon to select a start date. This date is typically the date the user is added in Rival Learn.

Termination Date: If the user no longer needs access to Rival Learn (such as when terminating employment), click the box or calendar icon to select a termination date.

Status: Select **Active** or **Inactive**. A user that is inactive in Rival Learn cannot access any information.

Status Description: Type any additional information to describe the user's status such as retired, on leave, and so on.

Supervisors: Click **Add** to add supervisors. Click **Removed Selected** to remove the selected supervisors from the table. Click **Mark All** to mark all of the supervisors in the table as selected.

Subordinates: Click **Add** to add subordinates. Click **Removed Selected** to remove the selected subordinates from the table. Click **Mark All** to mark all of the subordinates in the table as selected.

Contact Information

Enter any additional contact information if required.

Personal Information

Birthdate: Click the box or calendar icon to select the user's birthday from a calendar pop-up.

Gender: Select the user's gender from the list.

Notes: Type any additional notes if applicable.

Add a user

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Users**.

The **Users page** (page 289) opens.

3. Click **Add**.

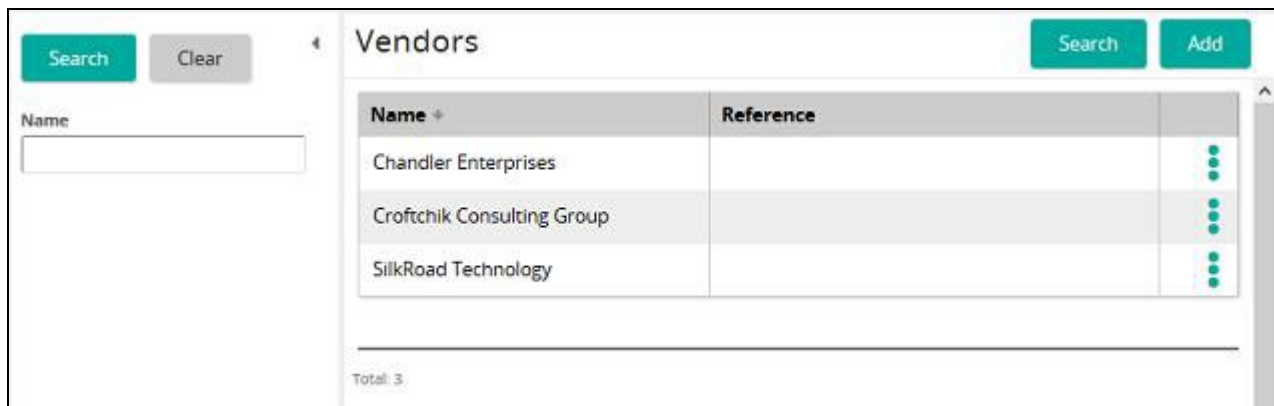
The **User Properties page** (page 290) opens.

4. Complete the fields.
5. Click **Add**.

Vendors

Vendors refer to a particular location or organization that provides or holds a training event or eCourse offering.

Vendors page



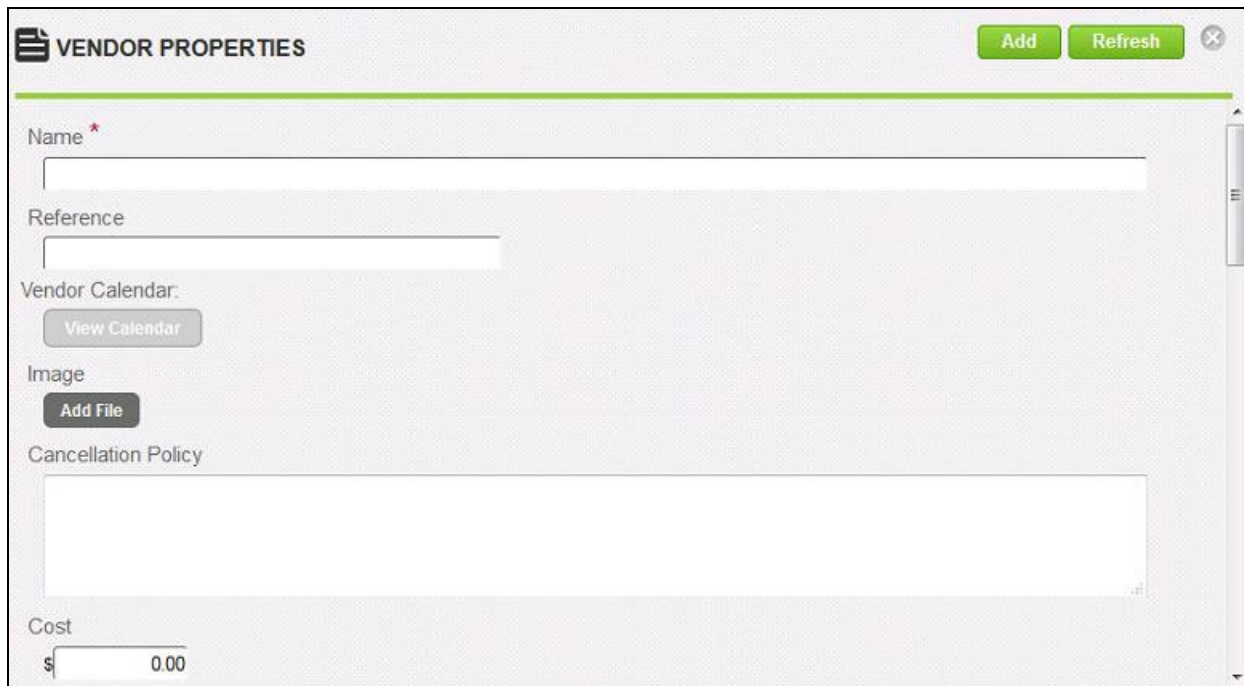
Name	Reference	
Chandler Enterprises		⋮
Croftchik Consulting Group		⋮
SilkRoad Technology		⋮

Total: 3

The Vendors page lists all the vendors available in Rival Learn. On this page, you can:

- Search for vendors
- View properties for existing vendors
- Add vendors
- Delete vendors

Vendor Properties page



The screenshot shows the 'VENDOR PROPERTIES' form. At the top right are 'Add' and 'Refresh' buttons. The form fields include: 'Name' (required, indicated by a red asterisk), 'Reference', 'Vendor Calendar' (with a 'View Calendar' button), 'Image' (with an 'Add File' button), 'Cancellation Policy' (a large text area), and 'Cost' (a numeric field with a dollar sign and a value of 0.00).

On the Vendor Properties page, you define properties for a vendor.

Fields

Name: Type the name of the vendor.

Reference: Type a reference for this item to make it easier to find in searches.

Vendor Calendar: Click **View Calendar** to view dates for the vendor.

Image: Click **Add File** to upload a vendor image. A progress bar shows the progress of the image upload. Once uploaded, a thumbnail image and file size are shown along with a Delete button.

Cancellation Policy: Type the vendor's cancellation policy.

Cost: Type the amount that the vendor charges.

Per: Select the cost unit, either **Per Day** or **Per Hour**.

Cellular: Type the vendor's mobile number.

Pager: Type the vendor's pager number.

Address: Type the vendor's address.

City: Type the vendor's city.

State/Province: Type the vendor's state or province.

Country: Type the vendor's country.

Zip/Postal Code: Type the vendors zip/postal code.

Qualifications: Type the qualifications the vendor has.

Notes: Type any free-text notes or additional information about the vendor.

Contact Name: Type the name of a contact person at the vendor.

Contact Phone: Type the phone number of the contact person at the vendor.

Contact Email: Type the email address of the contact person at the vendor.

Contact Website: Type the vendor's website address.

Add a vendor

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Vendors**.

The **Vendors page** (page 292) opens.

3. Click **Add**.

The **Vendor Properties page** (page 293) opens.

4. Complete the fields.
5. Click **Add**.

Modify a vendor

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Vendors**.

The **Vendors page** (page 292) opens.

3. Search for the vendor that you want.
4. In the list beside a vendor, click  and then click **Properties**.

The **Vendor Properties page** (page 293) opens.

5. Make changes as appropriate.
6. Click **Save**.

Delete a vendor

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Vendors**.

The **Vendors page** (page 292) opens.

3. Search for a vendor.
4. In the list beside a vendor, click  and then click **Delete**.
5. On the confirmation pop-up window, click **OK**.

Venues

A venue is a building where a training activity occurs.

In Rival Learn, where training occurs is managed through the following hierarchy level:

- Venue
- Training location

Not all organizations require the entire hierarchical structure to organize training. Training can be assigned to a venue only. However, if a training location is required, it must be linked to a venue.

Venues page



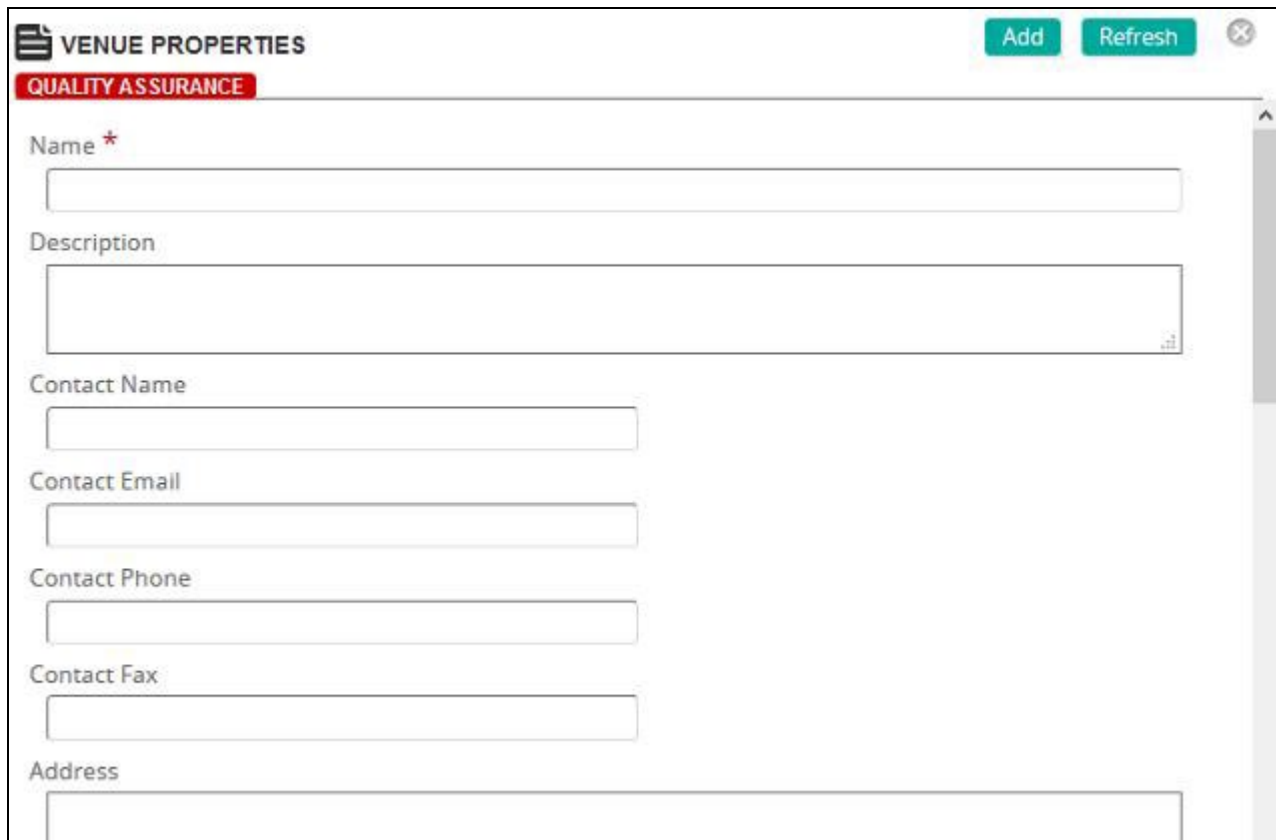
Name	City	State/Province
Central Computer Lab		
Eclipse Training Center - CAI Classroom A		
Eclipse Training Centre - Simulator Room		
OB Phillip Complex	Bushell Park	MN
South Port Aerospace Training Center	South Port	Manitoba

Total: 5

The Venues page lists all the venues available in Rival Learn. On this page, you can:

- Search for venues
- View properties for existing venues
- Add venues
- Delete venues

Venue Properties page



The screenshot shows the 'VENUE PROPERTIES' form. At the top right are 'Add' and 'Refresh' buttons. Below the title is a red 'QUALITY ASSURANCE' banner. The form fields are: 'Name' (required, indicated by a red asterisk), 'Description', 'Contact Name', 'Contact Email', 'Contact Phone', 'Contact Fax', and 'Address'. Each field has a corresponding text input box.

On the Venue Properties page, you define the properties for a venue.

Fields

Name: Type the name of the venue.

Description: Type a description of the venue.

Contact Name: Type the name of a contact person at the venue.

Contact Email: Type the email address of the contact person at the venue.

Contact Phone: Type the phone number of a contact person at the venue.

Contact Fax: Type the fax number of a contact person at the venue.

Address: Type the venue's address.

City: Type city where the venue is located.

State/Province: Type the state or province where the venue is located.

Country: Type the country where the venue is located.

Zip/Postal Code: Type the zip code/postal code where the venue is located.

Phone: Type the phone number of the venue.

Fax: Type the fax number of the venue.

Website: Type the venue's website address.

Notes: Type any additional notes about the venue.

Directions: Type directions to the venue.

Add a venue

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Venues**.

The **Venues page** (page 295) opens.

3. Click **Add**.

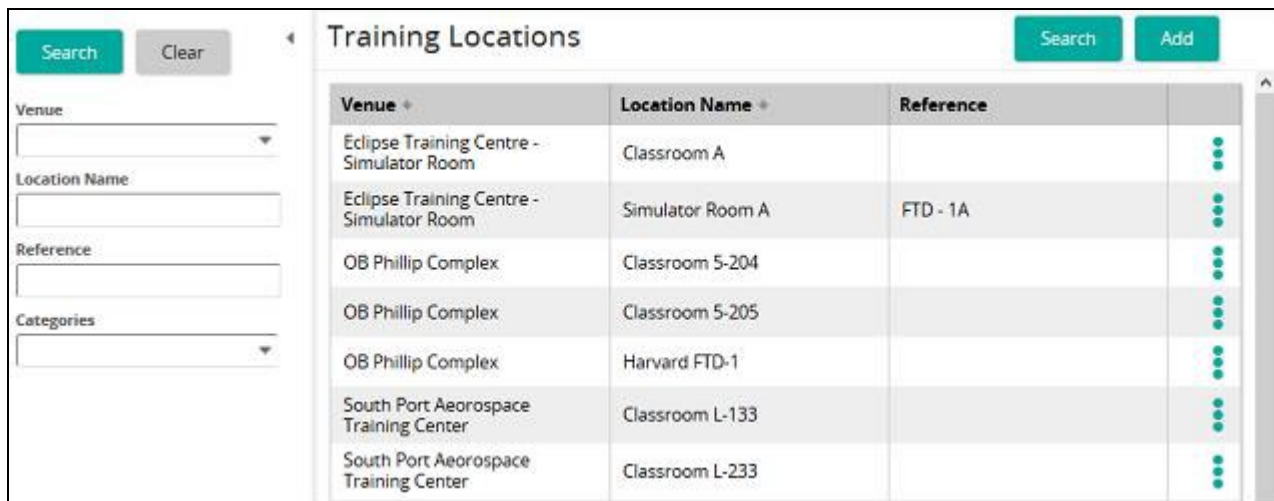
The **Venue Properties page** (page 296) opens.

4. Complete the fields.
5. Click **Add**.

Training Locations

A training location is a room name or room number where the training activity is to occur.

Training Locations page

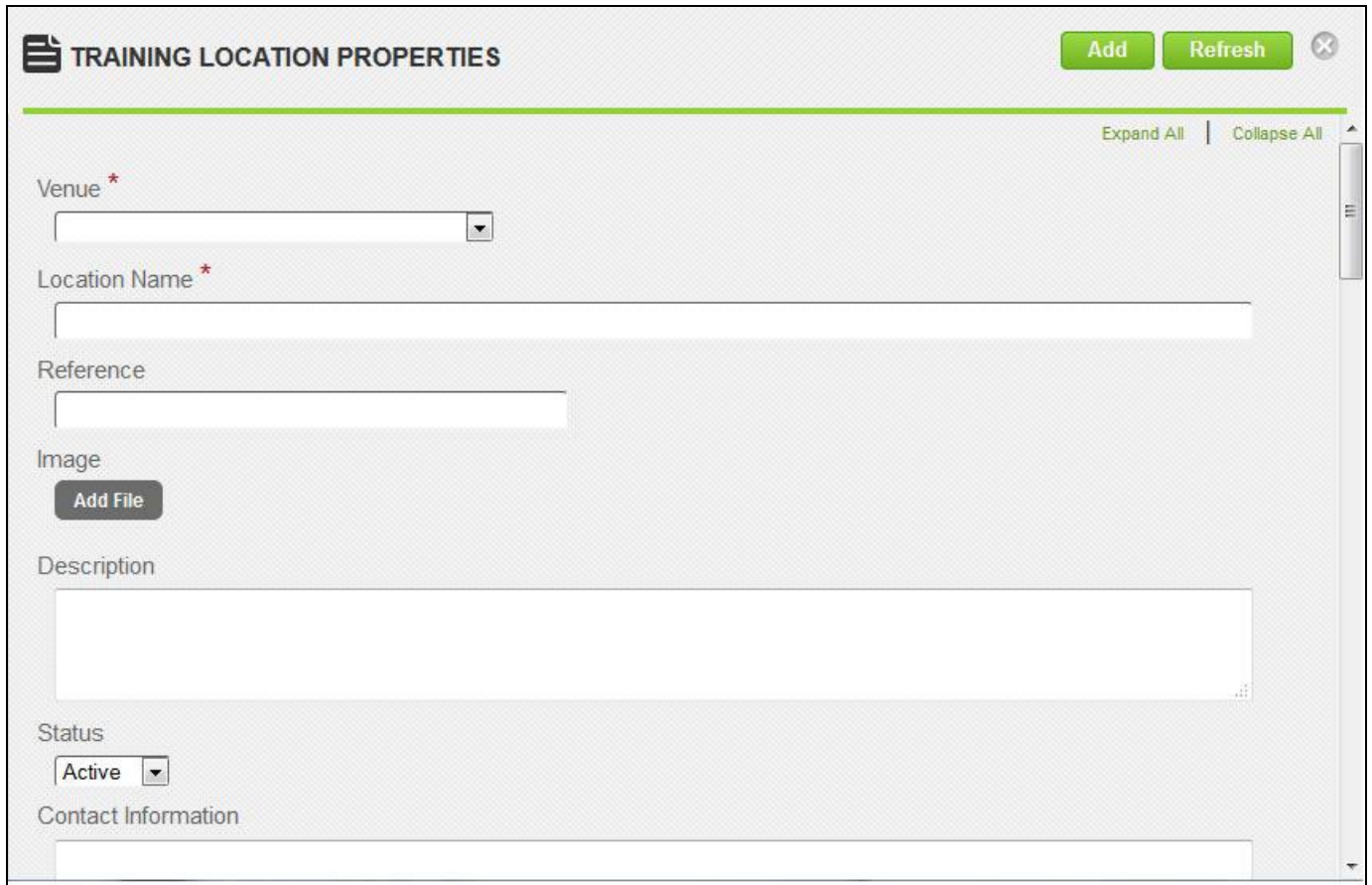


Venue	Location Name	Reference
Eclipse Training Centre - Simulator Room	Classroom A	
Eclipse Training Centre - Simulator Room	Simulator Room A	FTD - 1A
OB Phillip Complex	Classroom 5-204	
OB Phillip Complex	Classroom 5-205	
OB Phillip Complex	Harvard FTD-1	
South Port Aerospace Training Center	Classroom L-133	
South Port Aerospace Training Center	Classroom L-233	

The Training Locations page lists all the training locations available in Rival Learn. On this page, you can:

- Search for training locations
- View properties for existing training locations
- Add training locations
- Delete training locations

Training Location Properties page



The screenshot shows the 'TRAINING LOCATION PROPERTIES' form. At the top right are 'Add' and 'Refresh' buttons. Below the title bar are 'Expand All' and 'Collapse All' links. The form fields include: 'Venue' (a dropdown menu with a red asterisk), 'Location Name' (a text input field with a red asterisk), 'Reference' (a text input field), 'Image' (a section with an 'Add File' button), 'Description' (a large text area), 'Status' (a dropdown menu with 'Active' selected), and 'Contact Information' (a text input field). A vertical scrollbar is visible on the right side of the form.

On the Training Locations Properties page, you add training locations for venues to the database so that they are available when setting up training events. The training venue must exist before a training location can be added to it.

Fields

Venue: Select the venue where the training location is located.

Location Name: Type the name of the training location.

Reference: Type a reference for this item to make it easier to find in searches.

Image: Click **Add File** to upload an image of the training location. A progress bar shows the progress of the image upload. Once uploaded, a thumbnail image and file size are shown along with a Delete button.

Description: Type a description of the training location.

Status: Select **Active** or **Inactive**.

Contact Information: Type contact information for the training location.

Notification Email: Type a notification email for the training location.

Phone: Type the phone number of the training location.

Fax: Type the fax number of the training location.

Address: Type the address of the training location.

City: Type the city where the training location is located.

State/Province: Type the state or province where the training location is located.

Country: Type the country where the training location is located.

Zip/Postal Code: Type the zip/postal code for the training location.

Notes: Type any additional information about the training location.

Directions: Type directions to the training location.

Minimum Seats: Type the minimum number of seats allowed for the training location.

Maximum Seats: Type the maximum number of seats allowed for the training location.

Network Connections: Indicate the number of network connections in the training location.

Has Internet Access: Select this check box if the training location has internet access. Otherwise, leave it unchecked.

Room Cost: Indicate the cost for the training location.

Room Cost Type: Select the cost type, either **Per Day** or **Per Hour**.

Scheduling: Click **View Calendar** to view a calendar for the training location. In the Unavailability section, you can create and add unavailability rules to the calendar for the training location.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Add a training location

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Training Locations**.

The **Training Locations page** (page 297) opens.

3. Click **Add**.

The **Training Location Properties page** (page 298) opens.

4. From the Venue drop-down box, select a venue.
5. In the Location Name text box, type the name of the location.
6. Complete the remaining fields.
7. Click **Add**.

Instructors

Instructors can be defined in the system and assigned to a training event on the Planning Board or Training Event Properties page.

Instructors page

Search

Clear

Login

Last Name

First Name

Employee ID / Reference

Status

Active

UserID

Email

Categories

Instructors

Search

Add

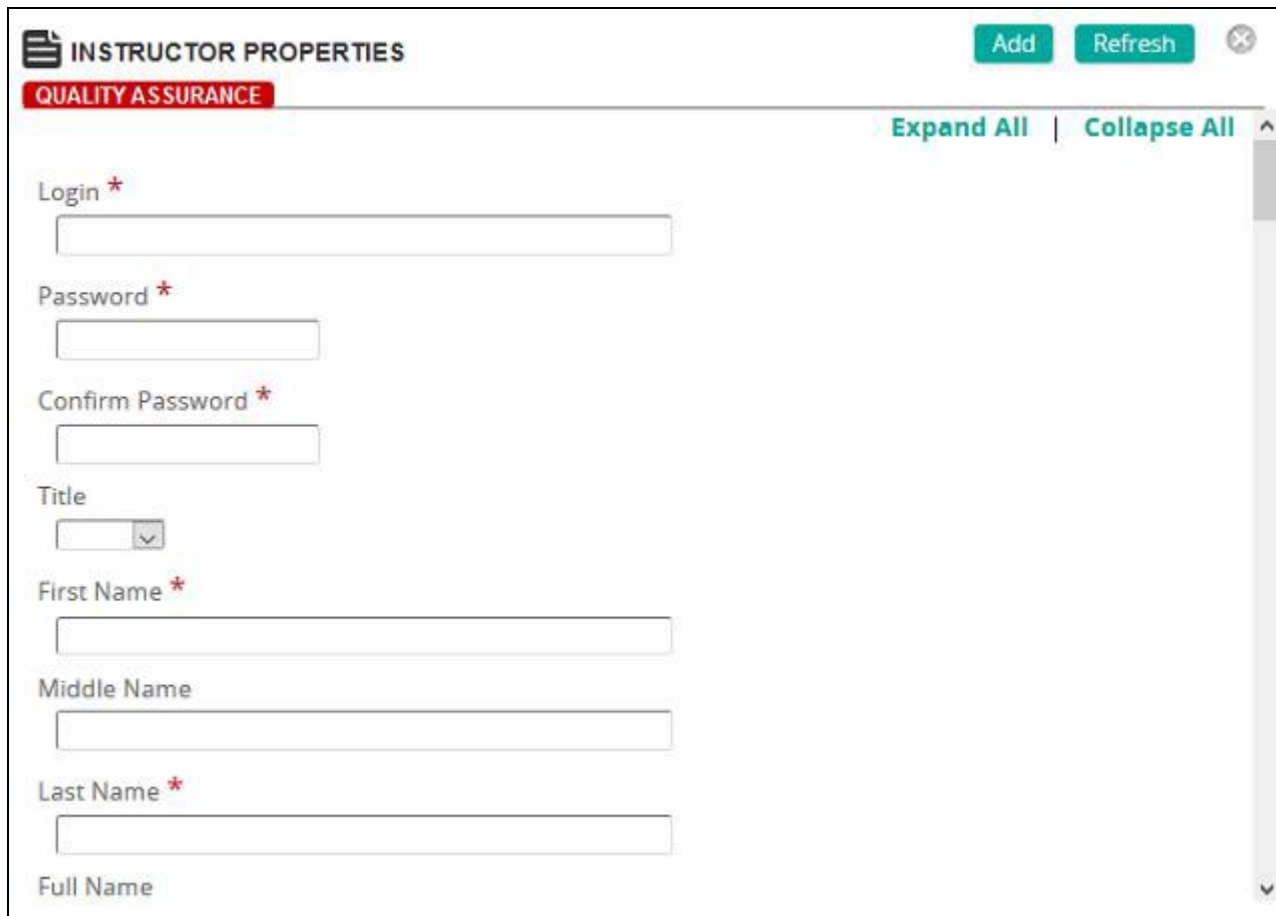
Last Name	First Name	Login	Status	Instructor Number	
Chen	Norman	norman	Active		
Instructor	GenProbe	instructor1	Active		
Instructor_001	Ole	instructor	Active		
Mulligan	Kelly	kelly	Active		
Trainer	Teresa	trainingsrt	Active		

Total: 5

The Instructors page lists all users set up as instructors in Rival Learn. On this page, you can:

- Search for instructors
- View properties for existing instructors
- Add instructors
- Delete instructors

Instructor Properties page



INSTRUCTOR PROPERTIES Add Refresh

QUALITY ASSURANCE Expand All | Collapse All

Login *

Password *

Confirm Password *

Title

First Name *

Middle Name

Last Name *

Full Name

On this page, you define properties for an instructor.

Fields

Login: Type a login ID.

Password: Type a password.

Confirm Password: Re-type the password you entered in the Password box.

Title: Select a title.

First Name: Type the first name of the instructor.

Middle Name: Type the middle name of the instructor.

Last Name: Type the last name of the instructor.

Full Name: Type the full name of the instructor.

Email: Type the email address of the instructor.

Force Profile update on next login: Select this check box to force the administrator to update profile at next login.

Authentication

Use External Authentication: If you want to use external authentication, select this check box.



Force Password Change on next login: To force a password change for the user on the next login, select this check box.

Instructor Workgroups: Click **Add** to search for and select a workgroup or workgroups.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Preferences

Language Preference: The language the user prefers to use for communications.

Email Format: The default email format. The options are:

- (use default): Pulls in the default email format that is set on the Company settings page (Default Email Format setting) and renders email accordingly.
- HTML: Renders email as HTML text.
- Plain Text: Renders email as plain text.

Organizational

Employee ID/Reference: Type a unique identifier for the user.

Start Date: Click the box or calendar icon to select a start date. This date is typically the date the user is added in Rival Learn.

Termination Date: If the user no longer needs access to Rival Learn (such as when terminating employment), click the box or calendar icon to select a termination date.

Status: Select **Active** or **Inactive**. A user that is inactive in Rival Learn cannot access any information.

Status Description: Type any additional information to describe the user's status such as retired, on leave, and so on.

Contact Information

Enter any additional contact information if required.

Personal Information

Birthdate: Click the box or calendar icon to select the user's birthday from a calendar pop-up.

Gender: Select the user's gender from the list.

Image: Click **Add File** to upload an image of the instructor. A progress bar shows the progress of the image upload. Once uploaded, a thumbnail image and file size are shown along with a Delete button.

Instructor Details

Instructor Number: Type the instructor number.

Cost: Enter the rate for the instructor.

Per: Select the cost unit, either **Per Day** or **Per Hour**.

Qualifications: Click **Add** to courses the instructor is qualified to teach. Instructor qualifications are used by the Planning Board to determine whether an instructor is qualified to teach a specific course.

Scheduling

View Calendar: Click to see any dates when the instructor is unavailable.

Unavailability: Click **Add** to add dates when the instructor is unavailable. Click **Removed Selected** to remove the selected unavailability date from the table. Click **Mark All** to mark all of the dates in the table as selected.

Notes: Add any free text additional comments about the instructor.

Instructor Homepage

Instructors assigned to training events automatically see any assigned training events on their Instructor home page. Only current events appear in the list. Past events and events more than six months in the future do not appear in the Instructor home page.

Add an instructor

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Instructors**.

The **Instructors page** (page 300) opens.

3. Click **Add**.

The **Instructor Properties page** (page 301) opens.

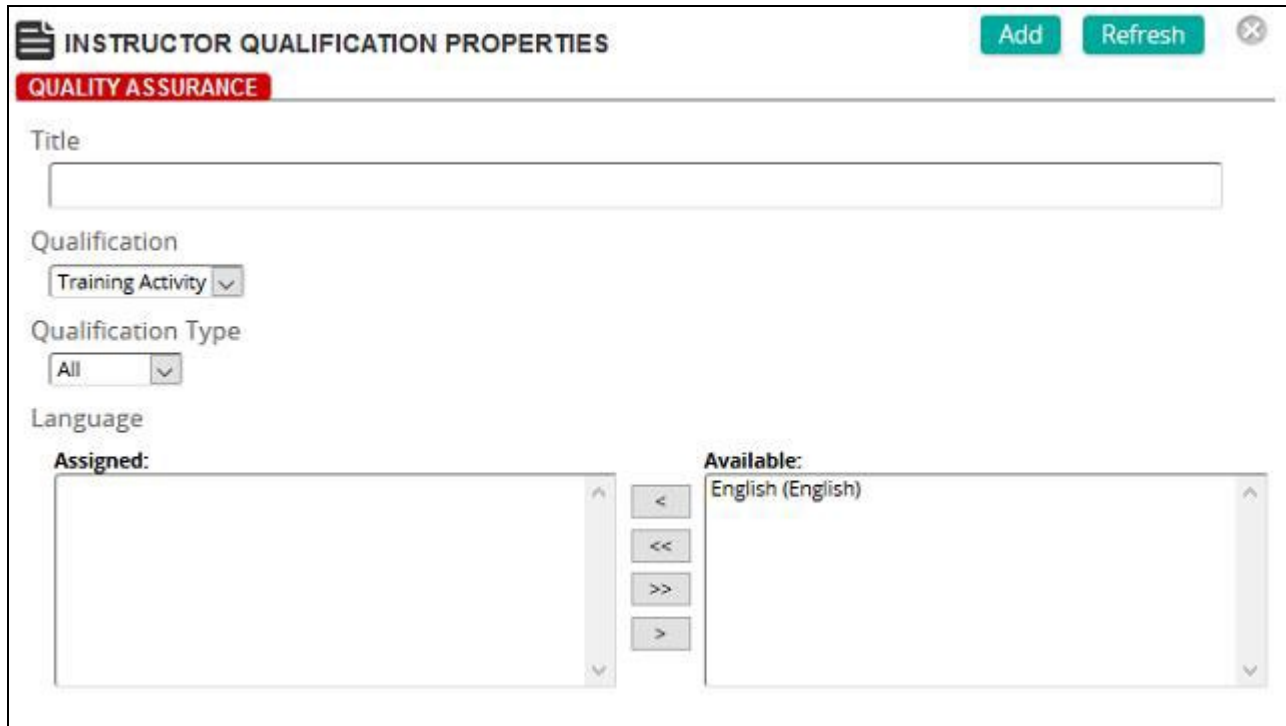
4. Complete the fields.
5. (If applicable) **Add instructor qualifications** (on page 304).
6. Click **Add**.

Instructor qualifications

Instructors can be qualified to teach training activities defined in Rival Learn based on the qualification rules defined for the Instructor. Instructors assigned to training events in the Planning Board who are not qualified to teach a specific course causes a resource conflict flag to be set for the training event.

Instructor qualifications are used by the Planning Board to determine whether an instructor is considered to be qualified to teach a specific course. Rival Learn indicates conflicts when an unqualified Instructor is associated to a training event that the instructor is not qualified to teach. Rival Learn provides a list of suggested Instructors when a training event is selected for editing in the Planning Board.

Instructor Qualification Properties page



On the Instructor Qualification Properties page, you define a qualification.

Fields

Title: Enter a title for the qualification rule.

Qualification: Select a qualification type, for example, Training Activity.

Qualification Type: Select one of the following options:

- **All:** The instructor is qualified to teach all training activities in the system
- **Criteria:** Limit qualification rule by language or category or both
- **Selection:** Define one or more specific training activities that can be taught by the instructor

Languages: To assign languages, click a language or languages from the Available list and use the arrow buttons to move them to the Assigned list.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Training Activity: If Qualification Type is Selection, you can select one or more specific training activities that can be taught by the instructor.

Add instructor qualifications

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Instructors**.

The **Instructors page** (page 300) opens.

3. Search for an instructor.

4. In the list beside an instructor, click  and then click **Properties**.

The **Instructor Properties page** (page 301) opens.

5. In the Qualifications section, click **Add**.

The **Instructor Qualification Properties page** (page 304) opens.

6. Define the qualification by completing the fields.

7. Click **Add**.

Equipment

Equipment is any item or device that is required for a training activity. Typical examples may include audiovisual equipment, laptops, laptop projectors, iPads, and so on.

Equipment is added to Rival Learn on the Equipment page. Equipment is assigned to specific training activities on the Planning Board.

Equipment page



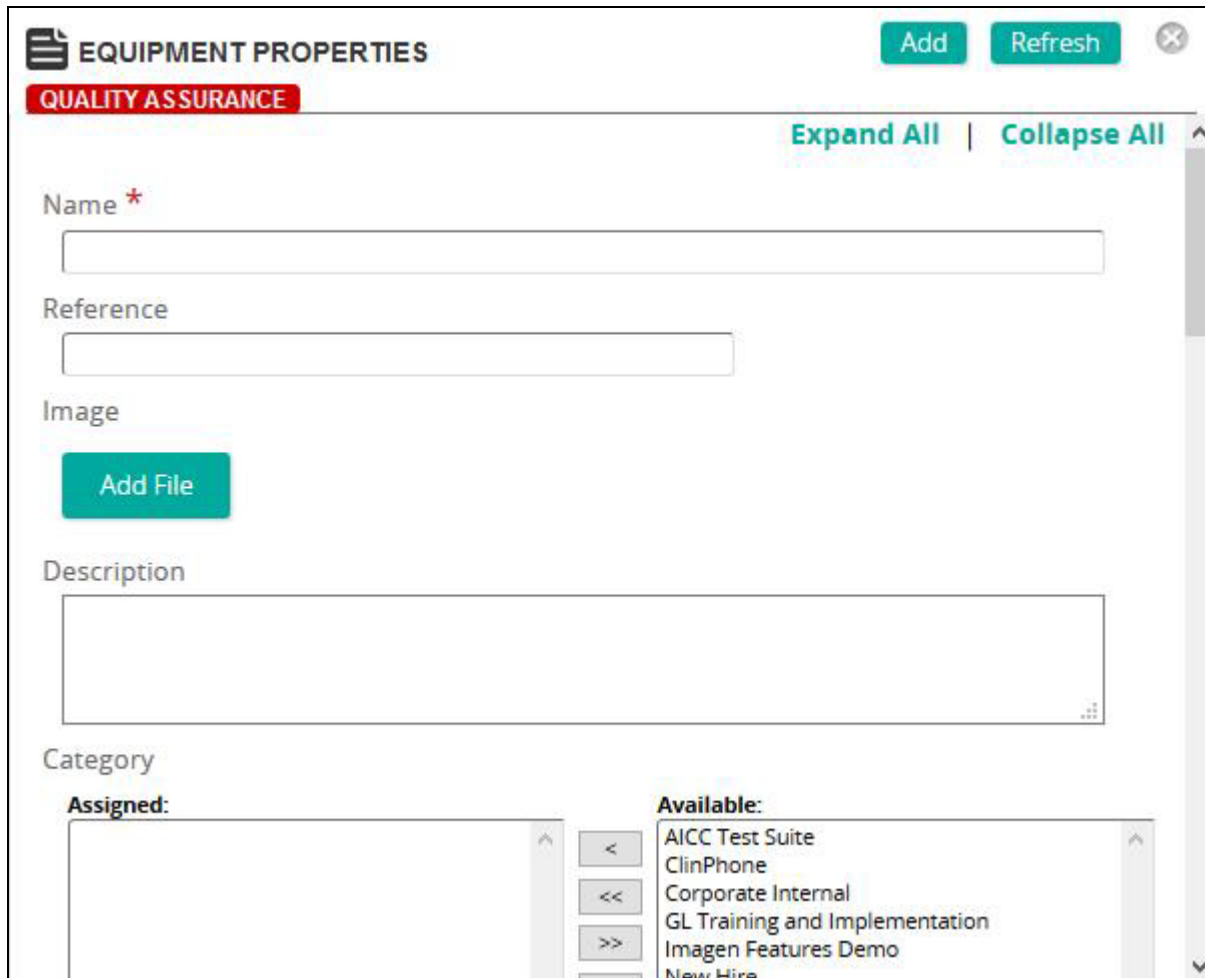
Name	Reference	Description	Status	Service Status	
Flight Training Device (LS)	FTD 001	Level 5 Flight Training Device	Active	Available	
Flight Training Device	FTD 002	Part Task Trainer	Active	Out for Repair	
Flight Training Device	FTD 003		Active	Available	
Flight Training Device	FTD 004		Active	Available	
Projector	PR001	High-Res Projector	Active	Available	
Slide Projector 23	SLI-023		Active	Available	

Total: 6

The Equipment page lists all equipment available in Rival Learn. On this page, you can:

- Search for equipment
- View properties for existing equipment
- Add equipment
- Delete equipment

Equipment Properties page



The screenshot shows the 'EQUIPMENT PROPERTIES' form. At the top right are 'Add' and 'Refresh' buttons. Below the title is a red 'QUALITY ASSURANCE' banner. To the right of the banner are 'Expand All' and 'Collapse All' links. The form fields include: 'Name *' (required), 'Reference', 'Image' (with an 'Add File' button), 'Description', and 'Category'. The 'Category' section has two lists: 'Assigned' (empty) and 'Available' (containing 'AICC Test Suite', 'ClinPhone', 'Corporate Internal', 'GL Training and Implementation', 'Imagen Features Demo', and 'New Hire'). Navigation arrows are between the lists.

On this page, you define properties for the equipment.

Fields

Name: Type a name the equipment.

Reference: Type a reference for this item to make it easier to find in searches.

Image: To include an image of the equipment, click **Add File** to upload an image. A progress bar shows the progress of the image upload. Once uploaded, a thumbnail image and file size are shown along with a Delete button.

Description: Type a description for the equipment.

Categories: To assign categories, click a category or categories from the Available list and use the arrow buttons to move them to the Assigned list.

Venue: Select the location where the equipment is to be used.

Serial Number: Type the equipment's serial number for tracking purposes.

Status: Select a status to indicate whether equipment is **Active** or **Inactive**.

Service Status: Select a status to indicate whether the equipment is usable (in service) or out of service (out for repair).

Contact Information: Type any contact information for the equipment.

Notification Email: Type a notification email address.

Equipment Location: Type a location where the equipment is stored or located.

Shipping Instructions: If shipping instructions are required for the equipment, provide them.

Cost: If there is a cost for the equipment, enter it.

Per: Select the cost unit, either **Per Day** or **Per Hour**.

Purchase Date: Click in the box or the calendar icon to select the date the equipment was purchased.

Notes: Type any free text notes about the equipment.

Scheduling

View Calendar: Click to see any dates when the equipment is unavailable.

Unavailability: Click **Add** to add dates when the equipment is unavailable. Click **Removed Selected** to remove the selected unavailability date from the table. Click **Mark All** to mark all of the dates in the table as selected.

Add equipment

1. From the navigation bar, click **Enterprise**.

2. Under Admin, click **Equipment**.

The **Equipment page** (page 305) opens.

3. Click **Add**.

The **Equipment Properties page** (page 306) opens.

4. Complete the fields.

5. Click **Add**.

Invoices

An invoice shows the course catalog items that a student has purchased.

Invoices page

Last Name

First Name

Student

Invoice #

Invoice Date
From To

Email

Invoices

Invoice #	Invoice Date	Account Name	Total	
10017	08-Apr-2014	Grayson Chandler	599.00	
10018	08-Apr-2014	Taylor Phillips	100.01	
10019	08-Apr-2014	Norman Chen	250.00	
10020	23-Apr-2014	Grayson Chandler	150.00	
10021	23-Apr-2014	Grayson Chandler	100.00	
10022	23-Apr-2014	Steve Paul	200.00	
10000	07-Jul-2016	Steve Paul	100.00	
10001	07-Jul-2016	Adam Chaters	100.00	
10002	07-Jul-2016	Adam Chaters	100.00	

The Invoices page lists all the invoices in Rival Learn. From this page, you can view invoice properties on the **Invoice Properties page** (on page 308) and add payments and refunds if necessary.

Invoice Properties page

INVOICES

QUALITY ASSURANCE

Invoice #

Invoice Date *

Student *

☒
Company Billing Information

First Name *

Last Name *

Address *

The Invoice Properties page shows details about a specific invoice. On this page, you can add payments and apply any refunds if necessary.

Fields

Invoice #: Display-only field that shows invoice number.

Invoice Date: Display-only field that shows invoice date.

Student: Display-only field that shows student name.

Billing Information: This section contains billing information of bill-to person, including first name, last name, billing address, phone, and email address. You can change information in this section if necessary.

Course Catalog Items: Display-only section that shows course catalog items that are billed on the invoice.

Sub Total: The subtotal cost of course catalog items on the invoice.

Total: The total cost of the course catalog items on the invoice.

Comment: Optional field where you can enter comments to appear on the invoice.

Add Payment: Click this button to manually add a payment.

Refunds: Click **Add** to add any refunds to the invoice. Refunds appear in the Refunds table.

Total Refund: Display-only field that shows the total dollar amount of refunds.

Balance: Display-only field that shows invoice balance. (Total amount - payments - refunds)

Add a payment to an invoice

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Invoices**.

The **Invoices page** (page 308) opens.

3. For the invoice you want, click  and then click **Properties**.

The **Invoice Properties page** (page 308) opens.

4. Click **Add Payment**.
5. Enter the payment amount and click **Add**.
6. On the Invoices Properties page, click **Save**.

Apply a full refund to an invoice

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Invoices**.

The **Invoices page** (page 308) opens.

3. For the invoice you want, click  and then click **Properties**.

The **Invoice Properties page** (page 308) opens.

4. Below the Refunds table, click **Add**.
5. On the Refund page, select (check) **Refund Entire Invoice**.

6. (If applicable) To automatically process credit card refund, select (check) **Automatically Process Credit Card Refund**.
7. (If applicable) To cancel the student out of training, select (check) **Revoke Training**.
8. Click **Add**.
9. On the Invoice Properties page, click **Save**.

Apply a partial refund to an invoice

1. From the navigation bar, click **Enterprise**.
2. Under Admin, click **Invoices**.

The **Invoices page** (page 308) opens.

3. For the invoice you want, click  and then click **Properties**.

The **Invoice Properties page** (page 308) opens.

4. Below the Refunds table, click **Add**.
5. On the Refund page, uncheck **Refund Entire Invoice**.
6. Below the Invoice Items table, click **Add**.
7. On the Invoice Items page, click **Search**, select the invoice item (a course catalog item) to refund, and click **Confirm**.
8. (If applicable) To automatically process credit card refund, select (check) **Automatically Process Credit Card Refund**.
9. (If applicable) To cancel the student out of training, select (check) **Revoke Training**.
10. Click **Add**.
11. On the Invoice Properties page, click **Save**.

Community

Address Book

The Rival Learn Address Book is used to create addresses to be used by the Rival Learn message system. Only those addresses defined in the Address Book can be used to send messages from within Rival Learn.

You can set up the following types of addresses:

- Administrator
- Instructor
- Student
- Student Group
- Workgroup
- Other

Address Book page

Search

Clear

Type

Name

Email Address

Description

Address Book

Search

Add

Type +	Name +	Description	Email Address	
Administrator	admin, admin	Training Manager for Western Region		
Student				
Student	Barton, Terry			
Student	Baxter, Michael			
Student	Brady, Kayla			
Student	Chandler, Grayson B			
Student	Chaters, Adam			
Student	Clynes, Brian	Test Student with no email		
Student	Guy, Doc			

The Address Book page lists the addresses that have been set up in Rival Learn. On this page, you can:

- Search for addresses
- View properties for existing addresses
- Add addresses
- Delete addresses

Address Book Entry Properties page

ADDRESS BOOK ENTRY PROPERTIES

Add

Refresh

QUALITY ASSURANCE

Type

Administrator

Administrator *

(none)

Description

On the Address Book Entry Properties page, you define an address for a specific address type.

Fields

Type: Select one of the following address types:

- Administrator

- Instructor
- Student
- Student Group
- Workgroup
- Other

The type you select controls the remaining fields on this page.

Administrator (Administrator type selected): Click  to search for and select an administrator.

Instructor (Instructor type selected): Click  to search for and select an instructor.

Student (Student type selected): Click  to search for and select a student.

Student Group (Student Group type selected): Click  to search for and select a student group.

Workgroup (Workgroup type selected): Click  to search for and select a workgroup.

Other (Other type selected): Provide a last name, first name, middle name, company name, email address, and description.

Add an address

1. From the navigation bar, click **Enterprise**.
2. Under Community, click **Address Book**.

The **Address Book page** (page 311) opens.

3. Click **Add**.

The **Address Book Entry Properties page** (page 311) opens.

4. Select an address type.
5. Complete the fields.
6. Click **Add**.

Learning Centers

Rival Learn provides the ability to customize the Student login, portal and Console for specific users or groups of users in the system by defining a Learning Center. Defining a Learning Center allows Administrators to define a unique login address for Students in the Learning Center.

Learning Centers must be configured manually for each learning center at the server as well as in the interface. To use the Learning Center function, contact Rival for assistance in setting it up.

Learning Centers page

Learning Centers			
Name +	Web Path	Skin	
Distribu Corp	distribucorp	DistribuCorp	⋮
Total: 1			

The Learning Centers page lists the Learning Centers that have been set up in Rival Learn. On this page, you can:

- View properties for existing Learning Centers
- Edit Learning Centers
- Delete Learning Centers

Learning Center Properties page


LEARNING CENTER PROPERTIES

Save

Refresh

✕

QUALITY ASSURANCE

Name *

Distribu Corp

Web Path *

distribucorp

Skin

DistribuCorp

User Interface Settings

On the Learning Center Properties page, you define the properties for a Learning Center.

Fields

Name: Type a name for the Learning Center.

Web Path: Type a http address for the Learning Center.

Skin: Select the skin to be used for the Learning Center.

User Interface Settings

Catalog Widget: To display the catalog widget on the Student Portal dashboard, check this option. You can then choose to display recommended courses or popular courses. If you choose recommended courses, add them to the Course Catalog Item list and put them in the order you want.

User Interface Settings: User interface settings control various functions within the selected skin. You can turn settings on or off. The settings are shown in the following table.

Setting	Description
Community	
Enable Community Link	Controls whether the Community link appears on the Student Content Viewer.
Enable Chat	Controls whether the chat function is available in the Administration portal.
Enable Forum	Controls whether the Forum is available.
Enable Messaging	Controls whether messaging is available.
Course Catalog	
Enable Team Enrollments	Controls whether a supervisor can enroll subordinates in in-class courses and online courses. If enabled (checked), the team enrollment feature is turned on and team enrollment icon appears in the course catalog. If not enabled, the feature is not available and the icon does not appear in the course catalog.
Always Show All Categories	If enabled, all available course catalog categories are shown all of the time in the course catalog. If not enabled, the category list can be expanded/collapsed.
Display Categories In Alphabetic Order	If enabled, shows categories in course catalog in alphabetical order rather than by number of items.
Student Homepage	
Homepage Menu	Controls the configuration of the Student homepage in the Student portal. You can assign or remove menu items (tiles) on the Student homepage and set the order of the tiles. You can do this for both the Life Suite and Legacy default skins. User interface settings can also be set for each Learning Center's Student homepage. Note: The My Training menu item must be the first menu item. You can reorder the remaining menu items as you want.
Show Print Certificate	Controls whether the Print Certificate button appears on the Student homepage.
Show Training Plan Report	Controls whether the Training Plan Report is available on the Student homepage.
Show Training History Report Link	Controls whether the History Report button appears on the Training History page.

Show Add Training Record Button	Controls whether the Add Training Record button is available on the Training History page.
Show Review Mode	Controls whether the Review Link is available for courses on the Training History page
Show Token Activation Code	Controls whether Token Activation Code entry is available on the My Training page. Token Activation is used for users to enter tokens provided by their administrator to access eCommerce Catalog Courses
Show New User Link on the Student Login	Controls whether New User link appears on the login page. New User link allows a user to set up user profile and security questions.
Use Legacy Checklist	Controls whether the legacy Checklist (pre-2019.2) or new Checklist (introduced in 2019.2) is used.
Student Reports	
Completion Certification Report	Select a default Completion Certification Report for the Student Portal.
History Report	Select a default History Report for the Student Portal.
ECommerce Catalog Invoice Report	Select a default ECommerce Catalog Invoice Report for the Student Portal.
Course Catalog Invoice Report	Select a default Course Catalog Invoice Report for the Student Portal.
Learning Journey Report	Select a default Learning Journey Report for the Student Portal.
Exam Results Report	Select an Exam Results Report for the Student Portal.
Admin Homepage	
Show Messaging	Controls whether the Messaging tile appears on the Rival Learn Admin home page.
Show Tasks	Controls whether the Tasks tile appears on the Rival Learn Admin home page.
Student Content	
Show Exam Results Report	Controls whether the Exam Results Report is available from the Test Summary page.
Show Next Link	Controls whether the Next link appears on the console banner.
Show Previous Link	Controls whether the Previous link appears on the console banner.
Show Glossary	Controls whether the Glossary tab appears on the console menu.

Show Search	Controls whether the Search tab appears on the console menu.
Show Study Aids	Controls whether the Show Study Aids tab appears on the console menu.
Show Features	Controls whether the Features tab appears on the console menu.
Show Menu Controls	Controls whether menu controls appear on the console menu.
eBusiness	
Show Ecom Course Description	Controls whether the Course Description appears in the eCommerce Catalog listing
Small Logo	To add a small logo to the login page and Student Portal home page, click  to search for and select an image. For best results, image should be 210 pixels by 72 pixels.
Large Logo	To add a large logo, click  to search for and select an image. For best results, image should be 445 pixels by 196 pixels.
Welcome Page These settings configure the top banner on the Student Portal. Leaving any setting blank causes the banner to display default values.	
Show Welcome Widget	Controls whether the top banner on the Student Portal is displayed.
Title	Enter a title. Leave this field blank to produce this default: Welcome to Rival Learn
Message	Enter text. This is typically welcome or introductory information. Tip: Some html tags are supported such as , , , . Leave this field blank to produce this default: Rival Learn is your personalized learning portal to help you develop new skills, launch courses, enroll in classes, view learning journeys, and connect with peers. To get started, launch or schedule courses assigned to you on the My Training page or explore courses available by searching in the course catalog.

Background	To add a custom background image to appear behind the top banner text, click  to search for and select an image. Tip: To make the image appear after the message, add a few
 tags to end of message. Leave this field blank to go with default image.
------------	--

Edit a Learning Center

1. From the navigation bar, click **Enterprise**.
2. Under Community, click **Learning Centers**.

The **Learning Centers page** (page 313) opens.

3. For the Learning Center that you want to edit, click  and then click **Properties**.

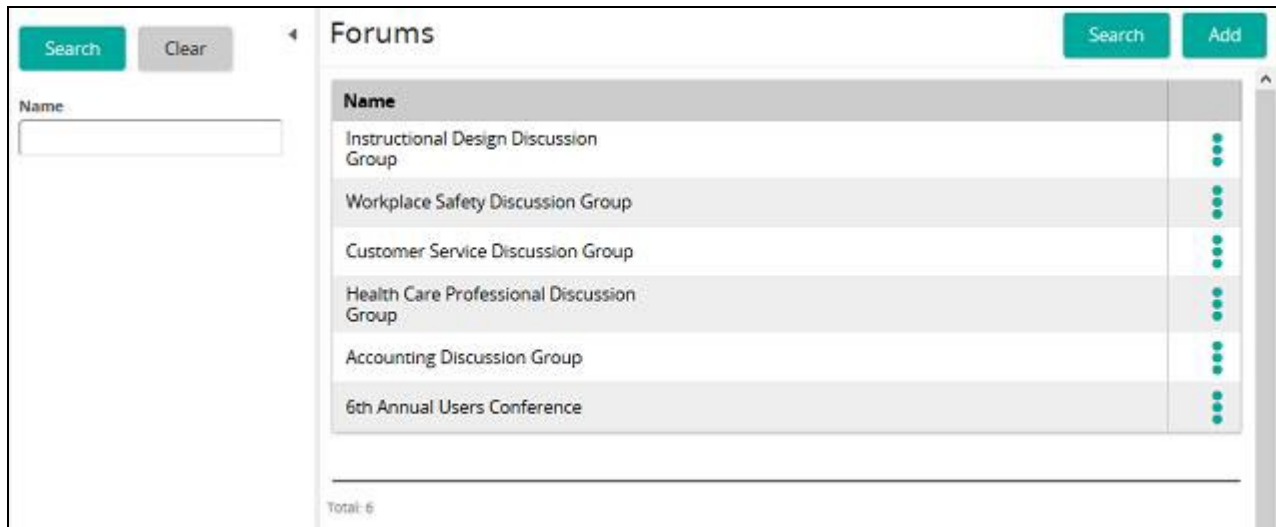
The **Learning Center Properties page** (page 313) opens.

4. Make edits to the name, web path, or user interface settings.
5. Click **Save**.

Forums

Forums offer a communication medium between Rival Learn administrators and students within the Rival Learn enterprise.

Forums page



Name	
Instructional Design Discussion Group	
Workplace Safety Discussion Group	
Customer Service Discussion Group	
Health Care Professional Discussion Group	
Accounting Discussion Group	
6th Annual Users Conference	

Total: 6

The Forums page lists the forums that are available in Rival Learn. On this page, you can:

- Search for forums
- View properties for existing forums
- Add forums
- Delete forums

Forum Properties page



The screenshot shows the 'FORUM PROPERTIES' page. At the top right are 'Add' and 'Refresh' buttons. Below the title is a red 'QUALITY ASSURANCE' banner. The form contains four sections: 'Name' with a text input field; 'Description' with a large text area; 'Media' with a dropdown menu showing '(none)' and search/clear icons; and 'Assign To' with a dropdown menu showing 'All Users'.

On the Forum Properties page, you define the properties for a forum.

Fields

Name: Type a name for the forum.

Description: Type a description for the forum.

Media: To include media in the forum, such as a logo, click  to search for and select media from the Media/Asset Bank page.

Assign To: Select one of the following:

- **All Users:** Allows all users to access to the forum.
- **Student Criteria:** Displays additional fields to use to restrict access to the forum. You can restrict by job, organization, group, and job category.

Add a forum

1. From the navigation bar, click **Enterprise**.
2. Under Community, click **Forums**.

The **Forums page** (page 317) opens.

3. Click **Add**.

The **Forum Properties page** (page 318) opens.

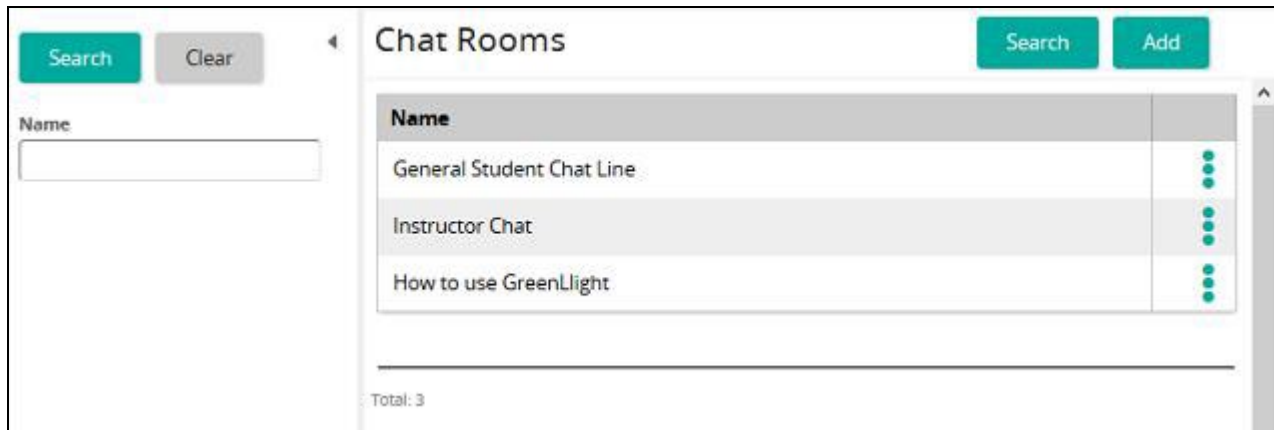
4. Provide a name and description for the forum.
5. (If applicable) Attach media.
6. (If applicable) Assign all users to the forum or restrict by user criteria (jobs, groups, job categories, and/or organizations).

7. Click **Add**.

Chat

Chat rooms are used by administrators to communicate with other users who are logged into Rival Learn. Chat rooms are accessible from the Community window in the Administration portal. Chat rooms are not supported in the Student portal.

Chat Rooms page



The screenshot shows the 'Chat Rooms' page. On the left, there is a search bar with a 'Search' button and a 'Clear' button. The main area displays a table with the following data:

Name	
General Student Chat Line	⋮
Instructor Chat	⋮
How to use GreenLight	⋮

At the bottom of the table, it says 'Total: 3'.

The Chat Rooms page lists the available chat rooms. On this page, you can:

- Search for chat rooms
- View properties for existing chat rooms
- Add chat rooms
- Delete chat rooms

Chat Room Properties page



The screenshot shows the 'CHAT ROOM PROPERTIES' page. At the top, there is a red banner that says 'QUALITY ASSURANCE'. Below this, there is a 'Name' field with a red asterisk next to it, indicating it is required. To the right of the form, there are 'Add' and 'Refresh' buttons, and a close button (X).

On the Chat Room Properties page, you provide a name for the chat room.

Fields

Name: Type a name for the chat room.

Define a chat room

1. From the navigation bar, click **Enterprise**.

2. Under Community, click **Chat**.

The **Chat Rooms page** (page 319) opens.

3. Click **Add**.

The **Chat Room Properties page** (page 319) opens.

4. From the Name text box, type the name of the chat room.

5. Click **Add**.

Notifications

Notifications are rules-based messages that automate the communication process between administrators and students.

Key info

- A notification is sent based on an event. The event is the **trigger** (see "**Notification messages, triggers and properties**" on page 321) that causes the notification to be sent.
- A notification must be enabled to be sent.
- Notification settings in **Company settings** (see "**Company page**" on page 366) are used for *all* notification messages. However, individual students can change their notification preferences in their profile and those user profile settings override company settings when user's preference is different than company settings.

Notification types

Type	Description	Example
Ad hoc	Created for a specific purpose and is sent out at a specific time.	System down time message
Trigger based	Sent out based on a specific event that triggers it.	eCourse Completion, eCourse Enrollment Approved, eCourse Enrollment Canceled, and so on.

Notification messages, triggers and properties

Event notifications are available based on the installed components.

References for venues and training locations are linked to the data associated to the training event *only*. Training events scheduled as multi-session events that have venues or training locations associated to the session are *not* reflected in notifications.

Notification	Rival Learn	Content Management	Outlook Invitation	eBusiness Mgmt	Triggered by	To: CC: or BCC:	Available Message Properties (see below for available fields for each Property)
Ad-Hoc Message					Set Date	Student Group members User Defined	Group Student
Bulk PO Payment Authorization Requested					Saving Student Profile or Student Properties with "Institutional Buyer" selected	Workgroup User Defined Student	Student
Bulk PO Payment Authorization Approved					Pending PO Payment Authorization is approved by Admin	Student User Defined	Student
Bulk PO Payment Authorization Rejected					Pending PO Payment Authorization is rejected by Admin	Student User Defined	Student
Content Workflow to Development					For Content Object in specific category, changing Workflow Status to Authoring and Send Notification ON	Workgroup User Defined	Content Object
Content Workflow to Staging					For Content Object in specific category, changing Workflow Status to Staging and Send Notification ON	Workgroup User Defined	Content Object

Notification	Rival Learn	Content Management	Outlook Invitation	eBusiness Mgmt	Triggered by	To: CC: or BCC:	Available Message Properties (see below for available fields for each Property)
Content Workflow to Content Library					For Content Object in specific category, changing Workflow Status to Content Library and Send Notification ON	Workgroup User Defined	Content Object
eCourse Completion					eCourse mastery record creation	Student Supervisors User Defined	e-Course Student User eCourse Records
eCourse Enrollment Approved					eCourse enrollment status is set to Approved	Student Supervisors	e-Course Student User eCourse Records
eCourse Enrollment Cancelled					eCourse enrollment status is set to Cancelled	Student Supervisors	e-Course Student User eCourse Records
eCourse Enrollment Denied					eCourse enrollment status is set to Denied	Student Supervisors	e-Course Student User eCourse Records
eCourse Enrollment Pending					eCourse enrollment status is set to Pending	Student Supervisors	e-Course Student User eCourseRecords
eCourse Expiration					Expiration date on e-Course purchased via ecom	Student User Defined	eCourse Student Primary Supervisor User eCourse Records

Notification	Rival Learn	Content Management	Outlook Invitation	eBusiness Mgmt	Triggered by	To: CC: or BCC:	Available Message Properties (see below for available fields for each Property)
Enrollment Pending					Purchase Catalog Item requiring approval	Student User Defined	Student CatalogItem
Enrollment Successful					Catalog purchase approved	Student User Defined	Student CatalogItem User e-Course Records
Eventing Failed Publication					API subscription failure	Workgroup User Defined	EventingSubscription
Eventing Subscription Offline					API subscription failure	Workgroup User Defined	EventingSubscription
Import Status Complete					Import Status	Workgroup	Notification
Import Status Failed					Import Status	Workgroup	Notification
Import Status Pending					Import Status	Workgroup	Notification
Import Status Running					Import Status	Workgroup	Notification

Notification	Rival Learn	Content Management	Outlook Invitation	eBusiness Mgmt	Triggered by	To: CC: or BCC:	Available Message Properties (see below for available fields for each Property)
Issue Tracking Change					Adding or updating an issue assigned to a specific category	Workgroup User Defined	Issue Tracking
Manual eCourse Enrollment					Creating unmastered e-Course records through Assess or Import	Student Supervisors User Defined	eCourse Student User eCourse Records
Pending Enrollment Accepted					Token set from Pending to Approved for Item with "Student Access Approval Required"	Student User Defined	Student CatalogItem
Pending Enrollment Refused					Token set from Pending to Refused	Student User Defined	Student CatalogItem
Purchased eCourse Enrollment					A student course catalog item is successfully purchased	Student Supervisor User Defined	Student CatalogItem User e-Course
Qualification Certification					Certification or Recertification due date	Student Supervisors User Defined	Student Primary Supervisor QualificationTitle Qualification Reference Qualification Comment QualificationData

Notification	Rival Learn	Content Management	Outlook Invitation	e Business Mgmt	Triggered by	To: CC: or BCC:	Available Message Properties (see below for available fields for each Property)
Qualification Required Training					Activation Period	Student Supervisors User Defined	Student Primary Supervisor QualificationTitle Qualification Reference Qualification Comment QualificationData
Recertification					Certification or Recertification due date	Student Supervisors User Defined	Student Primary Supervisor Qualification Qualification Category
Required Training Available					Activation Period	Student Supervisors User Defined	Student Category Qualification Qualification Category
Scheduled Report Failed					Scheduled report failed	Workgroup User Defined	Report
Scheduled Report Run					Scheduled report ran	Workgroup User Defined	Report

Notification	Rival Learn	Content Management	Outlook Invitation	e Business Mgmt	Triggered by	To: CC: or BCC:	Available Message Properties (see below for available fields for each Property)
Student Bulk Purchase					Bulk purchase is completed from the student portal	Student User Defined	Token Student Transaction
Student Group Membership Pending					Student profile creation (Group Self-enrollment)	Student Group members Supervisors User Defined	Group Student Primary Supervisor
Student Group Membership Successful					Student approval (Self or Admin)	Student Group members Supervisors User Defined	Group Student Primary Supervisor
Student Group Membership Declined					Student declined (Self or Admin)	Student Group members Supervisors User Defined	Group Student Primary Supervisor
Student Profile Creation					New Student Profile Creation through Self-Registration	Student User Defined	Student
Student Profile Creation by Admin					New Student Profile Creation by Admin (including imports)	Student Supervisors User Defined	Student Primary Supervisor
Student Profile Update					Existing Student Profile Update	Student User Defined	Student

Notification	Rival Learn	Content Management	Outlook Invitation	e Business Mgmt	Triggered by	To: CC: or BCC:	Available Message Properties (see below for available fields for each Property)
Training Activity Completion					Student mastery record saved as "mastered"	Student Course Administrator Supervisors User Defined	Training Activity Student Primary Supervisor User Training Activity
Training Event Cancellation					Training Event status set to Cancelled	Student (Enrolled) Supervisors Course Administrator Training Event Contact User Defined	Instructor Student Training Activity Training Event Training Event Contact Training Location Venue
Training Event Change					Change to Training Event Start/End Date or Time, Duration, Venue, Location	Student (Enrolled) Course Administrator Training Event Contact Supervisors User Defined	Instructor Student Training Activity Training Event Training Event Contact Training Location Venue

Notification	Rival Learn	Content Management	Outlook Invitation	eBusiness Mgmt	Triggered by	To: CC: or BCC:	Available Message Properties (see below for available fields for each Property)
Training Event Enrollment					Student added to enrollment list of a scheduled or confirmed Training Event	Student (Enrolled) Supervisors Course Administrator Training Event Contact User Defined	Instructor Student Training Activity Training Event Training Event Contact Training Event Roster Training Location Venue
Training Event Enrollment Cancellation					Administrator removes student from Training Event enrollment list. Student Cancels enrollment from Training page	Student (Enrolled) Supervisors Course Administrator Training Event Contact User Defined	Instructor Student Training Activity Training Event Training Event Contact Training Event Roster Training Location Venue

Notification	Rival Learn	Content Management	Outlook Invitation	eBusiness Mgmt	Triggered by	To: CC: or BCC:	Available Message Properties (see below for available fields for each Property)
Training Event Enrollment Pending					Student added to Waitlist of Training Event whose status is "Requires Approval"	Supervisors Course Administrator Training Event Contact User Defined	Instructor Student Training Activity Training Event Training Event Contact Training Location Venue
Training Event Start					Training event start date (Event status = Scheduled or Confirmed). Also applies to copied training events.	Student (Enrolled) Supervisors Course Administrator Training Event Contact User Defined	Instructor Student Training Activity Training Event Training Event Contact Training Location Venue
Training Event Waitlist					Student is added to Training Event waitlist (For copied training events) Student is added to a new training event waitlist as long as the status is set to Scheduled or Confirmed after the copy	Student (Waitlisted) Supervisors Course Administrator Training Event Contact User Defined	Instructor Student Training Activity Training Event Training Event Contact Training Event Roster Training Location Venue

Notification	Rival Learn	Content Management	Outlook Invitation	eBusiness Mgmt	Triggered by	To: CC: or BCC:	Available Message Properties (see below for available fields for each Property)
Training Event Waitlist Cancellation					Administrator removes student from Training Event waitlist Student cancels enrollment from Training page (For copied training events) Students are moved from a copied training event to the new training event	Student (Waitlisted) Supervisors Course Administrator Training Event Contact User Defined	InstructorStudent Training Activity Training Event Training Event Contact Training Event Roster Training Location Venue

Notification property fields

The following table provides the specific fields that can be inserted within a notification message based on the available properties for the type of notification:

Property	Available Fields	Location/Notes
Approval	ApprovalStatus ApprovalStatusBy ApprovalStatusComment ApprovalStatusDate	
CatalogItem	CatalogCode DemoURL Description Name ProductType	Catalog Item Properties Page (EM>eBusiness>Catalog Items)
Content Object	COName CODescription COPreference COType COLanguage COVersion ContentApprovalWorkflow SubmissionComment	COName Content Object Name field. CODescription Content Object Description field. COPreference Content Object Reference field. COType Content Object Type field. COLanguage Content Object Language field. COVersion Content Object Version field. ContentApprovalWorkflow Selected Content Approval Workflow stage from submission comment. SubmissionComment Submission comment text from submission comment.

Property	Available Fields	Location/Notes
Approval	ApprovalStatus ApprovalStatusBy ApprovalStatusComment ApprovalStatusDate	
eCourse	CancellationPolicy CourseDescription CourseLink (see "Course deep links" on page 349) CourseName CourseObjectives CourseOutline Prerequisites U_ECourse_YYY	eCourse Properties Page (Content>Delivery>eCourse) CancellationPolicy CourseDescription CourseName CourseObjectives CourseOutline Prerequisites Custom Fields defined for eCourses (Enterprise>Configuration>Custom Data Fields) Where YYY is the custom field Reference ID.
Group	GroupID GroupName	Student Group Properties Page (LM>Plan>Student Groups)
Import Properties	ImportStatusComplete ImportStatusFailed ImportStatusPending ImportStatusRunning	Import Status Complete Triggered when an HR import has completed. Import Status Failed Triggered when an HR import has failed to complete. Import Status Pending Triggered when an HR import is pending and not yet started to import. Import Status Running Triggered when an HR import begins to execute and is running.
Instructor	InstructorList	Inserts an instructor's name and email address into the message body as an object. It displays as follows: FirstName1 LastName1 (Email) FirstName2 LastName2 (Email) Recipients see the correct instructor's name and email address based on the event they are enrolled in.
Qualification	CertificationComment CertificationDueDate CertificationLink CertificationReference	Qualifications Properties Page (Learning>Direct>Qualifications) CertificationComment (Requirement) (Competency) (Intervention) CertificationDueDate: Represents a computed date value

Property	Available Fields	Location/Notes
Approval	ApprovalStatus ApprovalStatusBy ApprovalStatusComment ApprovalStatusDate	
	CertificationTitle (see "Course deep links" on page 349) CertificationType QualificationComment QualificationItemComment QualificationReference QualificationTitle	between the Effective Certification Date and the Certification Period values. (Note: If the Effective Certification Date value is not used, then the CertificationDueDate is computed between the Student Hire Date value and the Certification Period value). CertificationLink: See Course links (see "Course deep links" on page 349). CertificationReference: Represents the Reference field for every certification type: Competency, Requirement and Intervention (including eCourse, Training Activity, Exam and Assignment). (Requirement: Learning>Direct>Requirements) (Competency: Learning>Direct>Competencies) (eCourse: Content>Delivery>eCourses) (Training Activity: Learning>Plan>Training Activities) (Exam: Content>Authoring>Exams) (Assignments: Content>Authoring>Assignments) CertificationTitle: Represents the Name field for every certification type: Competency, Requirement and Intervention (including eCourse, Training Activity, Exam and Assignment). QualificationTitle QualificationComment QualificationReference
Report	DateTimeRun Description DownloadLink Name	Date and time report was run The description of the report The download link that launches the report for viewing The name of the report
Student	Address Birthdate City Country Email Fax FirstName LastName	Student Properties Page (LM>Plan>Students) Custom Fields defined for Students (EM/Configuration/Custom Data Fields) Where XXX is the Reference company ID and YYY the custom field Reference ID.

Property	Available Fields	Location/Notes
Approval	ApprovalStatus ApprovalStatusBy ApprovalStatusComment ApprovalStatusDate	
	ID LoginCode Phone WorkPhone PostalCode(Zipcode) Province(State) Supervisor EMP ID Supervisor FirstName Supervisor LastName U_STUDENT_XXX_YYY	
TrainingActivity	CancellationPolicy CourseDescription CourseName CourseLink (see "Course deep links" on page 349) CourseNotes CourseObjectives CourseOutline Prerequisites U_TA_XXX_YYY	Training Activity Properties Page (Learning>Plan>Training Activity) CancellationPolicy CourseDescription CourseName CourseNotes CourseObjectives CourseOutline Prerequisites Custom Fields defined for Training Activities (EM >Configuration>Custom Data Fields) Where XXX is the Reference company ID and YYY the custom field Reference ID.

Property	Available Fields	Location/Notes
Approval	ApprovalStatus ApprovalStatusBy ApprovalStatusComment ApprovalStatusDate	
TrainingEvent	AdministratorEmail AdministratorName Duration StartDate EndDate EventNotes EventType MeetingCallInNumber MeetingConferenceCode MeetingNumber MeetingURL Reference Sessions Status Version WaitListDate WaitListOrder WaitListReason	Training Event Properties Page (Learning>Plan>Training Event) AdministratorEmail AdministratorName Duration Computed time in minutes for End Date, Instructional Time or End Date. StartDate EndDate Reference Status Version
TrainingEventContact	Address BirthDate City Country Email Fax FirstName LoginCode Phone PostalCode Province WorkPhone	

Property	Available Fields	Location/Notes
Approval	ApprovalStatus ApprovalStatusBy ApprovalStatusComment ApprovalStatusDate	
Training Event Roster	ApprovalStatusBy ApprovalStatus ApprovalStatusDate ApprovalStatusComment CancelReason WaitListDate WaitListOrder WaitListReason	WaitListDate Date and time of when Student was added to the waitlist for the Training Event. WaitListOrder Waitlist number for the Training Event. WaitListReason Reason student added to waitlist for the Training Event displayed as: "Approval Required", "Max Enrollment Reached", "Enrollment Cutoff", or "Added by Administrator".
TrainingLocation	Address City ClassroomName ContactInformation Directions Fax LocationReference MaximumSeats NetworkConnections Phone State(Province) ZipCode(PostalCode)	Training Location Properties Page (Enterprise>Administration>Training Locations) Address City ClassroomName ContactInformation Directions Fax LocationReference MaximumSeats NetworkConnections Phone State(Province) ZipCode(PostalCode)

Property	Available Fields	Location/Notes
Approval	ApprovalStatus ApprovalStatusBy ApprovalStatusComment ApprovalStatusDate	
UserECourse	CompletionPercent CourseExpirationDate FinalMark MasteryDate StudentLastDate StudentStartDate U_USER_ECourse_YYY	CompletionPercent Is a computed percentage value based on student progress within an eCourse CourseExpirationDate Date and time of when the eCourse access expires. FinalMark Is the final mark for the eCourse (Percentage or Complete/Incomplete) MasteryDate Date and time of when the eCourse was mastered. StudentLastDate Date and time of when the student last entered the eCourse. StudentStartDate Date and time of when the student first entered the eCourse. Custom Fields defined for User eCourse (Enterprise>Configuration>Custom Data Fields) Where YYY is the custom field Reference ID.
User TrainingActivity	FinalMark MasteryDate StudentLastDate StudentStartDate U_USER_TA_YYY	FinalMark Is the final mark for the Training Activity (Percentage or Complete/Incomplete) MasteryDate Date and time of when the Training Activity was mastered. StudentLastDate Date and time of when the student completed the Training Activity. StudentStartDate Date and time of when the student first started the Training Activity. Custom Fields defined for User Training Activity (Enterprise>Configuration>Custom Data Fields) Where YYY is the custom field Reference ID.

Property	Available Fields	Location/Notes
Approval	ApprovalStatus ApprovalStatusBy ApprovalStatusComment ApprovalStatusDate	
Venue	Address City Description Directions Fax Notes State(Province) Telephone URL VenueName ZipCode(PostalCode)	Venue Properties Page (Enterprise>Administration>Venues) Address City Description Directions Fax Notes State(Province) Telephone URL VenueName ZipCode(PostalCode)

Notifications page

Notifications							
Event	Name	Enabled	Outlook Invitation	Notification Time	Repeat	Applies To	
Ad-Hoc Message	bc test23	Yes	No	17-Jun-2008 4:10 PM	No	**Customer1(Group Members)	
Ad-Hoc Message	Brian Test	Yes	No	17-Jun-2008 2:45 PM	No	**Customer1(Group Members)	
Ad-Hoc Message	Brian Test - Copy - 2017-12-15_11:20:39	No	No	17-Jun-2008 2:45 PM	No	**Customer1(Group Members)	
Ad-Hoc Message	Brian Test - Copy - 2018-01-05_07:12:36	No	No	17-Jun-2008 2:45 PM	No	**Customer1(Group Members)	
Ad-Hoc Message	Maintenance Briefing	Yes	No	24-Apr-2007 3:39 PM	No	Maintenance Engineers(Group Members)	
Content Workflow To Staging	Staging Review Notification	Yes	No	Immediate	No	GLOBAL	

The Notifications page lists the notifications that are available in Rival Learn. On this page, an administrator can:

- Search for notifications

- View the properties for a notification
- Add a notification
- Delete a notification
- Copy a notification
- View notification audits

Create a message notification

1. From the navigation bar, click **Enterprise**.
2. Under Community, click **Notifications**.

The Notifications page opens.

3. Click **Add**.

The Notifications Properties page opens.

4. From the Event drop-down box, select **Ad Hoc Message**.
5. In the Name text box, type the name for the event.
6. Select the **Enabled** check box.
7. Under Notification Period from the Specific Time drop-down boxes, select the month, year, and click the day, then using the slide select the hour and minute.

If the site is configured to set time zones, select a time zone from the drop-down box. Any Training Event Notifications using Outlook invites that are triggered for the event will notify the recipient in their local time zone. Click **Done**.

8. From To, click **Select**.

The Student Groups page opens.

9. Search for and select the student or students.
10. Click **From**.

The Message Sender page opens.

11. In the Display Name text box type the name of the person the message is being sent from.
12. In the Email text box, type the email address that is associated with the Display Name.
13. Click **Set Sender** to add the Display Name and Email to the Message Sender Entries list.
14. Click **Save**.
15. Under Message Options from the Language drop-down box, select a language.
16. From the Format drop-down box, select the format.
17. Click **Create/Edit Message** to create the notification message.

The Notification Message Properties page opens.

18. In the Subject text box, type the subject of the message.
19. In the Message text box, type the notification message.

20. From the Object drop-down boxes, select **Student** or **Group** from the first drop-down then select the appropriate database field from the second drop-down.
21. Click **Insert**.
22. Click **Save**.
23. Click **Add**.

Copy a notification

- When you copy a notification, plain and html text messages, language specific versions, and trigger settings are included.
 - Date and time is appended to the copied notification file name.
 - A copied notification is disabled by default.
1. From the navigation bar, click **Enterprise**.
 2. Under Community, click **Notifications**.
- The **Notifications page** (page 338) opens.
3. Search for the notification you want to copy.
 4. In the list beside a notification, click  and then click **Copy**.
 5. On the confirmation pop-up, click **OK**.

The copy appears in the list. Open it to make any changes, including enabling it.

Make a recertification notification reoccurring

1. From the navigation bar, click **Enterprise**.
 2. Under Community, click **Notifications**.
- The **Notifications page** (page 338) opens.
3. Search for a recertification notification.
 4. In the list beside a notification, click  and then click **Properties**.
 5. In the Repeat panel, click the **Repeat** check box.
 6. Enter the number of times to repeat and when.
 7. On the confirmation pop-up, click **Save**.

Make a recertification notification course-specific

1. From the navigation bar, click **Enterprise**.
 2. Under Community, click **Notifications**.
- The **Notifications page** (page 338) opens.
3. Search for a recertification notification.
 4. In the list beside a notification, click  and then click **Properties**.
 5. In the Restrictions panel, click (uncheck) the **Applies to All** check box.
 6. Click **Add** to select a certification or certifications.

Tip: Certifications can be any of these types: Ecourse, Training Activity, Assignment, Competency, or Requirement.

7. On the confirmation pop-up, click **Save**.

Create an event notification for scheduled reports

1. From the navigation bar, click **Enterprise**.
2. Under Community, click **Notifications**.

The Notifications page opens.

3. Click **Add**.

The Notification Properties page opens.

4. From the Event drop-down box, select one of the following options:
 - **Scheduled Report Failed:** Notification indicates a scheduled report failed to run (Not specific to a particular report)
 - **Scheduled Report Run:** Notification indicates a scheduled report ran (Not specific to a particular report)
5. In the Name text box, type the name for the event.
6. Select the **Enabled** check box.
7. Under Notification Period, do the following:
 - a. In the Time text box, type the unit of time.
 - b. From the Units drop-down box, select **Days** or **Hours**.
 - c. From the When drop-down box, select **After**.

8. Click **To**.

The Message Recipient page opens.

9. Select one of the following options:
 - **System Recipient** and then select a workgroup
 - **User Defined Recipient** (custom users), then type the display name in the Display Name text box and type the email address associated with the display name in the Email text box
10. Click **Set Recipient** to add the System Recipient or Defined Recipient to the Message Recipient Entries list, and click **Save**.

11. Click **From**.

The Message Sender page opens.

12. In the Display Name text box type the name of the person the message is being sent from.
13. In the Email text box, type the email address that is associated with the Display Name.
14. Click **Set Sender** to add the Display Name and Email to the Message Sender Entries list.
15. Click **Save**.
16. Under Message Options, do the following:

- a. From the Language drop-down box, select a language.
 - b. From the Format drop-down box, select the format.
 - c. Click **Create/Edit Message** to create the notification message.
17. (If applicable) Create delivery exemptions.
 18. Click **Add**.

This notification can now be associated with a scheduled report on the Company Report Properties page in the Notification Rule section.

Create a required training available notification

- A required training available notification lets a student know when training is pushed to their My Training page. It can also let a supervisor know that an employee has required training available. The notification is triggered by the activation date of a course within an intervention, competency, or requirement.
1. From the navigation bar, click **Enterprise**.
 2. Under Community, click **Notifications**.
The Notifications page opens.
 3. Click **Add**.
 4. On the Notifications Properties page, from the Event drop-down box, select **Required Training Available**.
 5. In the Name text box, type the name for the event.
 6. Select the **Enabled** check box.
 7. Under Notification Period, set when the notification is to be sent.
 8. Click **To** and select who receives notification.
 - a. On the Message Recipient window, select one of the following:
 - **System Recipient** (student or supervisor of student whose required training activation date was added or changed), then select a system recipient form the drop-down box.
 - **User Defined Recipient** (custom users), then type the display name in the Display Name text box and type the email address that is associated with the display name in the Email text box.
 - b. Click **Set Recipient** to add the System Recipient or Defined Recipient to the Message Recipient Entries list and click **Save**.
 9. Click **From**.
 - a. On the Message Sender window, in the Display Name text box, type the name of the person the message is being sent from.
 - b. In the Email text box, type the email address that is associated with the Display Name.
 - c. Click **Set Sender** to add the Display Name and Email to the Message Sender Entries list. Click **Save**.
 10. Under Message Options, select language and format. Click **Create/Edit Message** to create the notification message.

The Notification Message Properties window opens.

- a. In the Subject text box, type the subject of the message.
- b. In the Message text box, type the notification message.
- c. From the Objects drop-down boxes, select the appropriate object from the first drop-down then select the appropriate database field from the second drop-down.
- d. Click **Insert**.
- e. Click **Save**.

11. Under Restrictions, do one of the following:

- Leave **Applies to All** checked. This training available notification applies to all courses.
- Click (uncheck) **Applies to All** to make this notification course-specific. Select the course(s).

12. Click **Add** to add the notification.

Create a training event start notification

- The training event start notification is triggered based on the defined start date for the training event. For example, an administrator can send a message notification reminding all students in a particular class of the start date, one week before the class is to begin.

1. From the navigation bar, click **Enterprise**.
2. Under Community, click **Notifications**.

The Notifications page opens.

3. Click **Add**.

The Notifications Properties page opens.

4. On the Notifications Properties page, from the Event drop-down box, select **Training Event Start**.
5. In the Name text box, type the name for the event.
6. Select the Enabled check box.
7. Under Notification Period in the Time text box, type the unit of time.
8. From the Units drop-down box, select **Days** or **Hours**.
9. From the When drop-down box, select **Before** or **After**.

10. Click **To**. The Message Recipient window opens.

11. Select the radio button of one of the following:

- **System Recipient** (students that are part of the class roster), then select a system recipient from the drop-down box.
- User **Defined Recipient** (custom users), then type the display name in the Display Name text box and type the email address that is associated with the display name in the Email text box.

12. Click **Set Recipient** to add the System Recipient or Defined Recipient to the Message Recipient Entries list.

13. Click **Save**.

14. Click **From**.

The Message Sender window opens.

15. In the Display Name text box type the name of the person the message is being sent from.
16. In the Email text box, type the email address that is associated with the Display Name.
17. Click Set Sender to add the Display Name and Email to the Message Sender Entries list.
18. Click **Save**.
19. Under Message Options from the Language drop-down box, select a language.
20. From the Format drop-down box, select the format.
21. Click **Create/Edit Message** to create the notification message. The Notification Message Properties window opens.
22. In the Subject text box, type the subject of the message.
23. In the Message text box, type the notification message.
24. From the Objects drop-down boxes, select an object from the first drop-down then select the appropriate database field from the second drop-down.
25. Click **Insert**.
26. Click **Save**.
27. Click **Add** to add the notification.

Create a training event enrollment pending notification

- The training event enrollment pending notification is triggered based on a student added to the waitlist for a training event that "Requires Approval". The notification can be set to automatically be sent to the student's supervisor based on user linked to the Reports To field in the student property sheet. The notification can be used to send a notice to the student's supervisor that they require approval to enroll in the selected training event.

1. From the navigation bar, click **Enterprise**.
2. Under Community, click **Notifications**.

The Notifications page opens.

3. Click **Add**.

The Notifications Properties page opens.

4. From the Event drop-down box, select **Training Event Enrollment Pending**.
5. In the **Name** text box, type the name for the event.
6. Select the **Enabled** check box.
7. Under **Notification Period** in the **Time** text box, type the unit of time.
8. From the **Units** drop-down box, select **Days** or **Hours**.
9. From the **When** drop-down box, select **Before** or **After**.
10. Click **To**. The **Message Recipient** window displays.
11. Select the radio button of one of the following:

- **System Recipient** (students that are part of the class roster), then select a system recipient from the drop-down box.
 - User **Defined Recipient** (custom users), then type the display name in the **Display Name** text box and type the email address that is associated with the display name in the **Email** text box.
12. Click **Set Recipient** to add the System Recipient or Defined Recipient to the Message Recipient Entries list.
 13. Click **Save**.
 14. Click **From**. The **Message Sender** window displays.
 15. In the **Display Name** text box type the name of the person the message is being sent from.
 16. In the **Email** text box, type the email address that is associated with the **Display Name**.
 17. Click **Set Sender** to add the Display Name and Email to the Message Sender Entries list.
 18. Click **Save**.
 19. Under **Message Options** from the **Language** drop-down box, select a language.
 20. From the **Format** drop-down box, select the format.
 21. Click **Create/Edit Message** to create the notification message. The Notification Message Properties window opens.
 22. In the Subject text box, type the subject of the message.
 23. In the Message text box, type the notification message.
 24. From the Objects drop-down boxes, select an object from the first drop-down then select the appropriate database field from the second drop-down.
 25. Click **Insert**.
 26. Click **Save**.
 27. Click **Add** to add the notification.

Create a content workflow to staging notification

- The content workflow to staging notification is triggered based on a content object being moved from the development stage to staging.
1. From the navigation bar, click **Enterprise**.
 2. Under Community, click **Notifications**.
The Notifications page opens.
 3. Click **Add**.
The Notifications Properties page opens.
 4. From the Event drop-down box, select **Content Workflow To Staging**.
 5. In the Name text box, type the name for the event.
 6. Select the **Enabled** check box.
 7. From Category, under Available select one or more categories, then click the left arrow to move them under Assigned.
 8. Under Notification Period in the Time text box, type the unit of time.

9. From the Units drop-down box, select **Days** or **Hours**.
10. From the When drop-down box, select **Before** or **After**.
11. Click **To**. The Message Recipient window opens.
12. Select the radio button of one of the following:
 - **System Recipient** (administrators in the appropriate work group), then select a system recipient form the drop-down box.
 - **User Defined Recipient** (custom users), then type the display name in the **Display Name** text box and type the email address that is associated with the display name in the **Email** text box.
13. Click Set Recipient to add the System Recipient or Defined Recipient to the Message Recipient Entries list.
14. Click **Save**.
15. Click **From**. The Message Sender window opens.
16. In the Display Name text box type the name of the person the message is being sent from.
17. In the Email text box, type the email address that is associated with the Display Name.
18. Click Set Sender to add the Display Name and Email to the Message Sender Entries list.
19. Click **Save**.
20. Click **Add**.

Create a qualification required training notification

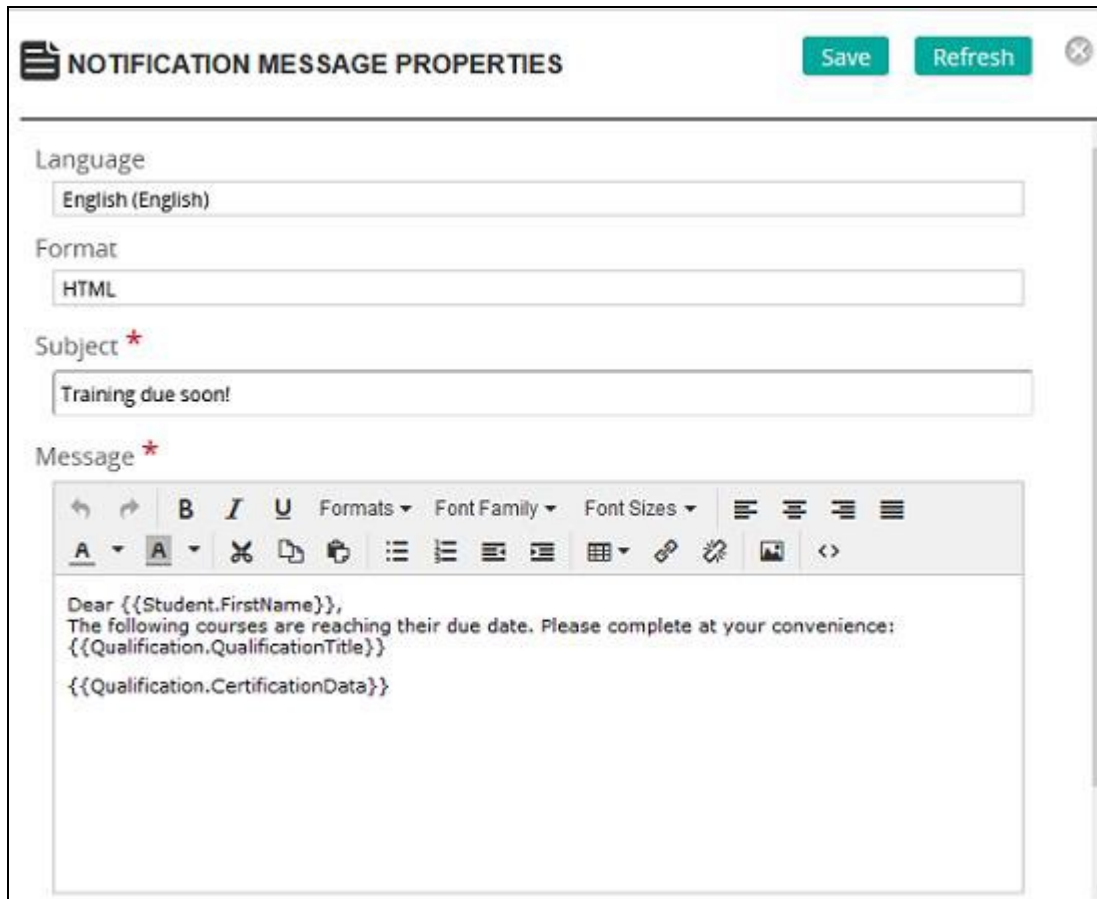
- This notification lets a student know which courses have been assigned when they become a member of a qualification. It is triggered by any new membership associated to the qualification. The notification contains a summary of each certification in the qualification.
1. From the navigation bar, click **Enterprise**.
 2. Under Community, click **Notifications**.
The Notifications page opens.
 3. Click **Add**.
 4. On the Notifications Properties page, from the Event drop-down box, select **Qualification Required Training**.
 5. In the Name text box, type the name for the event.
 6. Select the **Enabled** check box.
 7. Under Notification Period, set when the notification is to be sent.
 8. Click **To** and select who receives notification.
 - a. On the Message Recipient window, select one of the following:
 - **System Recipient** (student or supervisor of student whose required training activation date was added or changed), then select a system recipient form the drop-down box.
 - **User Defined Recipient** (custom users), then type the display name in the Display Name text box and type the email address that is associated with the display name in the Email text box.

- b. Click **Set Recipient** to add the System Recipient or Defined Recipient to the Message Recipient Entries list and click **Save**.
9. Click **From**.
 - a. On the Message Sender window, in the Display Name text box, type the name of the person the message is being sent from.
 - b. In the Email text box, type the email address that is associated with the Display Name.
 - c. Click **Set Sender** to add the Display Name and Email to the Message Sender Entries list. Click **Save**.
10. Under Message Options, select language and format. Click **Create/Edit Message** to create the notification message.

The Notification Message Properties window opens.

- a. In the Subject text box, type the subject of the message.
- b. In the Message text box, type the notification message. Insert the appropriate merge tags. The key merge tag for this notification is `{{Qualification.Certification.Data}}`. It summaries the certification data that is part of the certification in one notification (email).
- c. Click **Save**.

Here is what a sample message may look like:



11. Under Restrictions, do one of the following:

- Leave **Applies to All** checked. This training available notification applies to all courses.
- Click (uncheck) **Applies to All** to make this notification course-specific. Select the course(s).

12. Click **Add** to add the notification.

Create a qualification recertification notification

- This notification lets a student know about certifications in a qualification that are expiring. It is triggered by each certification expiration date. This notification sends one notification for each certification that has the same expiration date. However, when certifications have difference expiration dates, those are sent based on their own expiration date.

1. From the navigation bar, click **Enterprise**.

2. Under Community, click **Notifications**.

The Notifications page opens.

3. Click **Add**.

4. On the Notifications Properties page, from the Event drop-down box, select **Qualification Recertification**.

5. In the Name text box, type the name for the event.

6. Select the **Enabled** check box.

7. Under Notification Period, set when the notification is to be sent.

8. Click **To** and select who receives notification.

a. On the Message Recipient window, select one of the following:

- **System Recipient** (student or supervisor of student whose required training activation date was added or changed), then select a system recipient form the drop-down box.
- **User Defined Recipient** (custom users), then type the display name in the Display Name text box and type the email address that is associated with the display name in the Email text box.

b. Click **Set Recipient** to add the System Recipient or Defined Recipient to the Message Recipient Entries list and click **Save**.

9. Click **From**.

a. On the Message Sender window, in the Display Name text box, type the name of the person the message is being sent from.

b. In the Email text box, type the email address that is associated with the Display Name.

c. Click **Set Sender** to add the Display Name and Email to the Message Sender Entries list. Click **Save**.

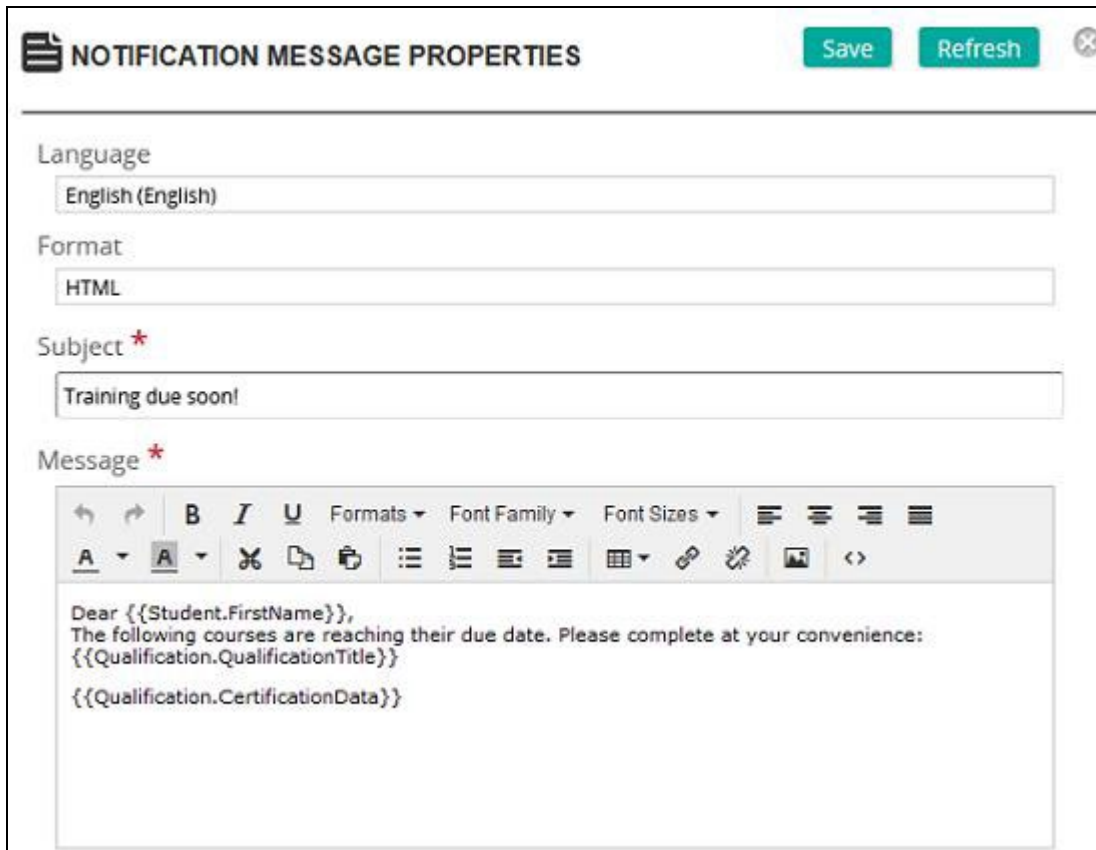
10. Under Message Options, select language and format. Click **Create/Edit Message** to create the notification message.

The Notification Message Properties window opens.

a. In the Subject text box, type the subject of the message.

- b. In the Message text box, type the notification message. Insert the appropriate merge tags. The key merge tag for this notification is {{Qualification.Certification.Data}}.
- c. Click **Save**.

Here is what a sample message may look like:



11. Under Restrictions, do one of the following:
 - Leave **Applies to All** checked. This training available notification applies to all courses.
 - Click (uncheck) **Applies to All** to make this notification course-specific. Select the course(s).
12. Click **Add** to add the notification.

Course deep links

A course deep link is a direct link to a course. Course deep links can be included in many training event, training activity, eCourse, and qualification notifications (see **Course deep link tags** (on page 350)). When a course link is clicked in a notification, a specific action happens, as shown in the following table.

When you click a course deep link in a:	This happens:
eCourse notification	The eCourse is launched.
Training activity or training event notification	The Course Schedule page is launched and shows information about the training activity/training event.

Qualification notification (Required training notification, recertification notification, for example)	For eCourses, the ecourse is launched. For training activities/training events, the Course Schedule page is launched.
--	---

Course deep link tags

There are two course deep link tags:

- CourseLink
- CertificationLink

CourseLink tag can be added to any of these notifications:

- eCourse Completion
- eCourse Enrollment Approved
- eCourse Enrollment Cancelled
- eCourse Enrollment Denied
- eCourse Enrollment Pending
- eCourse Expiration
- Manual eCourse enrollment
- Training Activity Completion
- Training Event Cancellation
- Training Event Change
- Training Event Enrollment
- Training Event Enrollment Cancellation
- Training Event Enrollment Pending
- Training Event Start
- Training Event Waitlist
- Training Event Waitlist Cancellation

CertificationLink can be added to any of these notifications:

- Recertification
- Required Training

Notification exemptions

Sometimes you may want to exclude certain users from receiving notifications. You can exempt users from receiving notifications based on specific Users, User Groups, Jobs, Job Categories or Organizational Units.

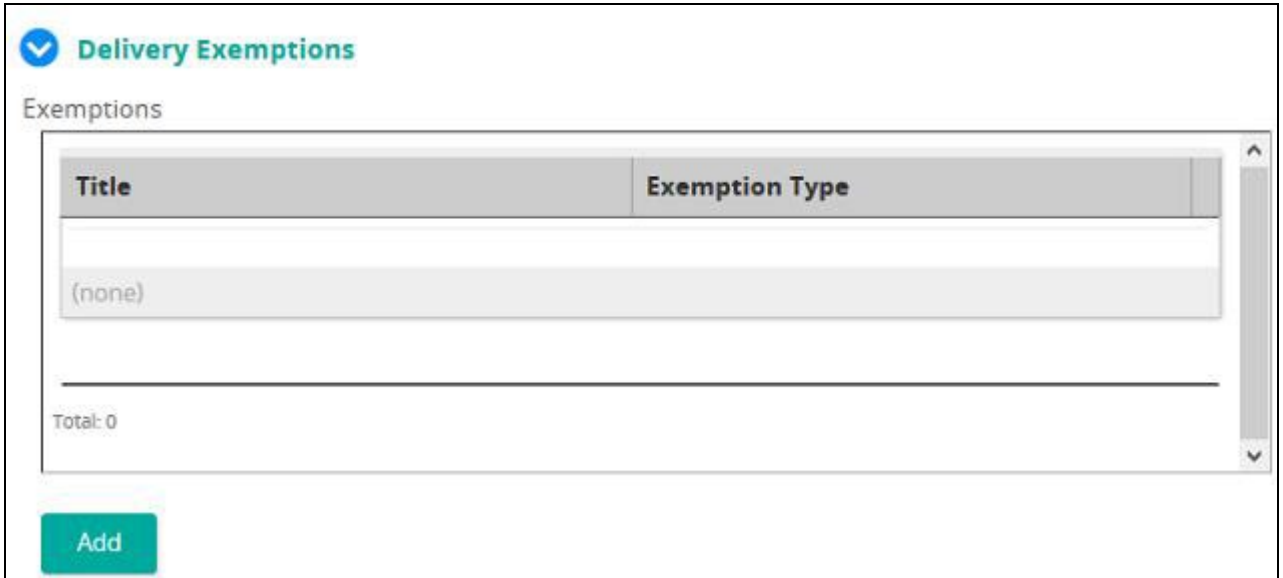
Exempt certain users from receiving specific notifications

1. From the navigation bar, click **Enterprise**.
2. Under Community, click **Notifications**.

The Notifications page opens.

3. Click **Search** or filter the search by typing additional information into the filter boxes.
4. In the list beside a notification, click  and then click **Properties**.

The Notification Properties page opens.



5. Under **Delivery Exemptions** for **Exemptions** click **Add**. The **Notification Exemption Properties** window opens.
6. In the **Title** text box, type a name for the exemption.
7. In the **Description** text box, type a description of the exemption.
8. From the **Exemption Type** drop-down box, select an exemption type.
9. Click **Select** to link the appropriate User, Group, Job, Job Category, or Organization Unit you want to exempt.
10. Click **Add**.
11. Click **Save**.

Configuration

The Configuration section contains various dataset integration tools used primarily to:

- Migrate information from one system to another
- Create database values
- Apply company-wide settings

Categories

Categories are used for organizational purposes—like in search filters and reports. Special categories for jobs and qualifications provide additional functionality.

- Job categories can be used to direct training to users through a qualification.
- Qualification categories can be used to group similar qualifications and display these groups to users in their individual Learning Journey.

Categories can be created and assigned to one or more objects. They can be added to the following objects:

Assignment	Job
Competency	Media
Content Object	Qualification
Content Template	Question Bank
eCourse	Requirement
Equipment	Training Activity
Exam	Training Catalog Items
Glossary	Training Event
Group	User

Add a category

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Categories**.

The Categories page opens.

3. Click **Add**.

The Category Properties page opens.

4. Type a name and description.
5. Assign the category to a table or tables.

For example, you may want to categories course catalog items under a safety category. You would select **Course Catalog Item**.

6. Click **Add**.

Edit a category

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Categories**.

The Categories page opens.

3. Click **Search** to display all existing categories.
4. In the list beside a category, click  and then click **Properties**.
5. Make changes.
6. Click **Save**.

Delete a category

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Categories**.

The Categories page opens.

3. Click **Search** to display all existing categories.
4. In the list beside a category, click  and then click **Delete**.
5. At the confirmation deletion prompt, click **OK**.

Titles

Titles can be applied to users within Rival Learn. The Titles database table is used to store titles. A typical use for titles is for military ranks.

Add a title

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Titles**.

The Titles page opens.

3. Click **Add**.

The Title Properties page opens.

4. Enter a reference.

A reference is how the title is stored in the system. Users do not see this. Reference often matches the title.

5. Enter a title.

The title appears in drop-down lists. It is typically an abbreviation. For example, CMdre, Gen, Maj.

6. Enter a description.

The description is the title spelled out. For example, Commodore, General, Major.

7. Click **Add**.

Edit a title

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Titles**.

The Titles page opens.

3. In the list beside a title, click  and then click **Properties**.

The Title Properties page opens.

4. Make changes.

5. Click **Save**.

Delete a title

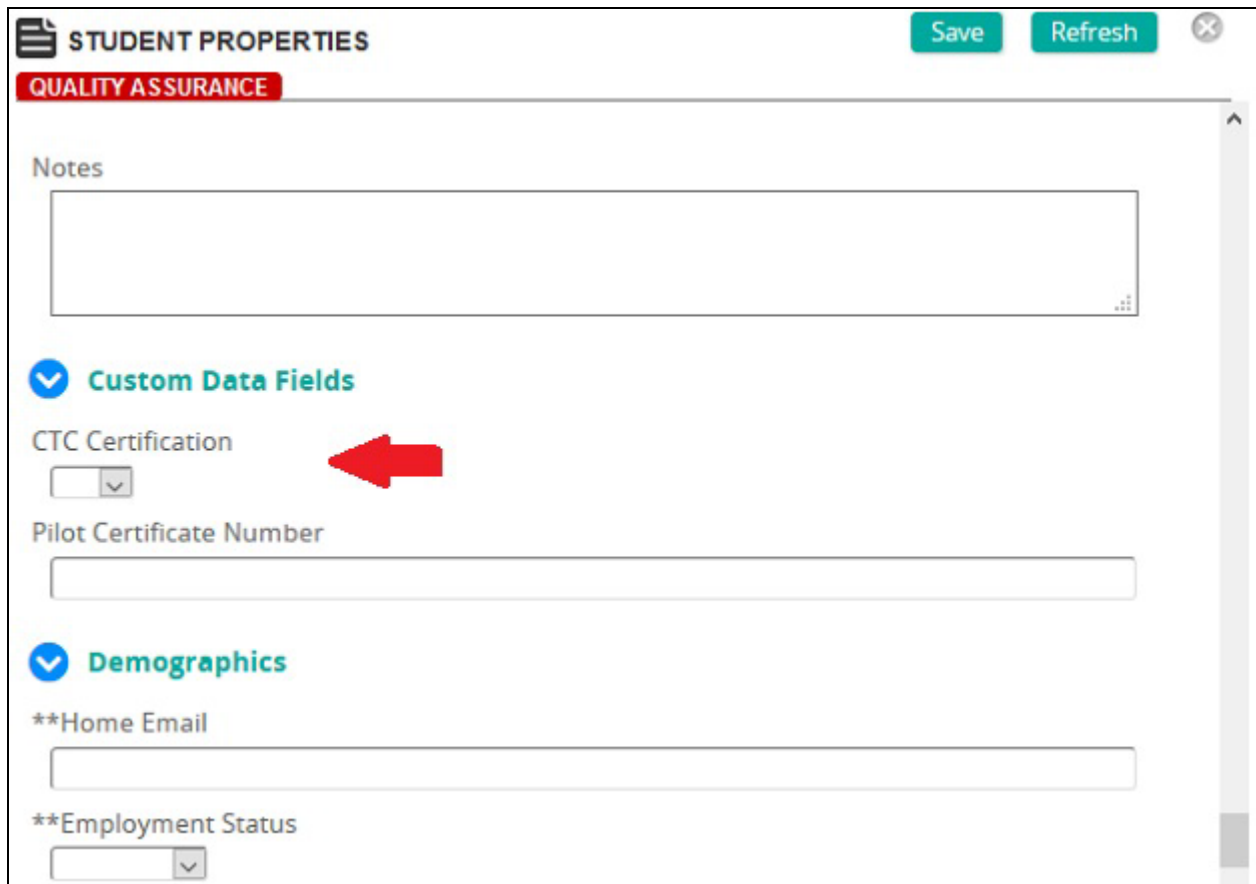
1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Titles**.

The Titles page opens.

3. In the list beside a title, click  and then click **Delete**.

4. At the confirmation deletion prompt, click **OK**.

Custom data fields



STUDENT PROPERTIES Save Refresh ✕

QUALITY ASSURANCE

Notes

Custom Data Fields

CTC Certification 

Pilot Certificate Number

Demographics

**Home Email

**Employment Status

With custom data fields, you can collect data that is otherwise not collected in the system. For example, you might want to collect licensing and degree information for students. You can create custom data fields to collect that information.

Custom data fields can be added as properties in these system tables:

- Students
- Vendors
- Course records
- eCourses
- Training activities
- Competencies
- Training locations
- User course records
- User competency record
- User assignment records

- User exam records
- User requirement records

Custom data fields can also be used as filters for searching and building custom reports.

Custom data fields appear at the bottom of a properties page. They can be organized into a group and then sequenced (ordered) within that group.

Add a custom data field

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Custom Fields**.

The Custom Data Fields page opens.

3. Click **Add**.

The Custom Data Field Properties page opens.

4. Name the field and create a reference. A reference makes the field easier to find in searches.
5. Select the table where the field will appear.
6. Select the field type. Options:
 - Boolean
 - Date
 - List
 - Multi Select
 - Memo
 - Text
7. (Optional) Enter a group name. A group name replaces the Custom Data Fields label on the property page.
8. Leave the **Active** check box selected so that the custom field appears on the selected table's property page.
9. If you have more than one custom field for a table, select a display order. This controls the order in which custom fields appear on the property page.
10. Click **Add**.

Edit a custom data field

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Custom Fields**.

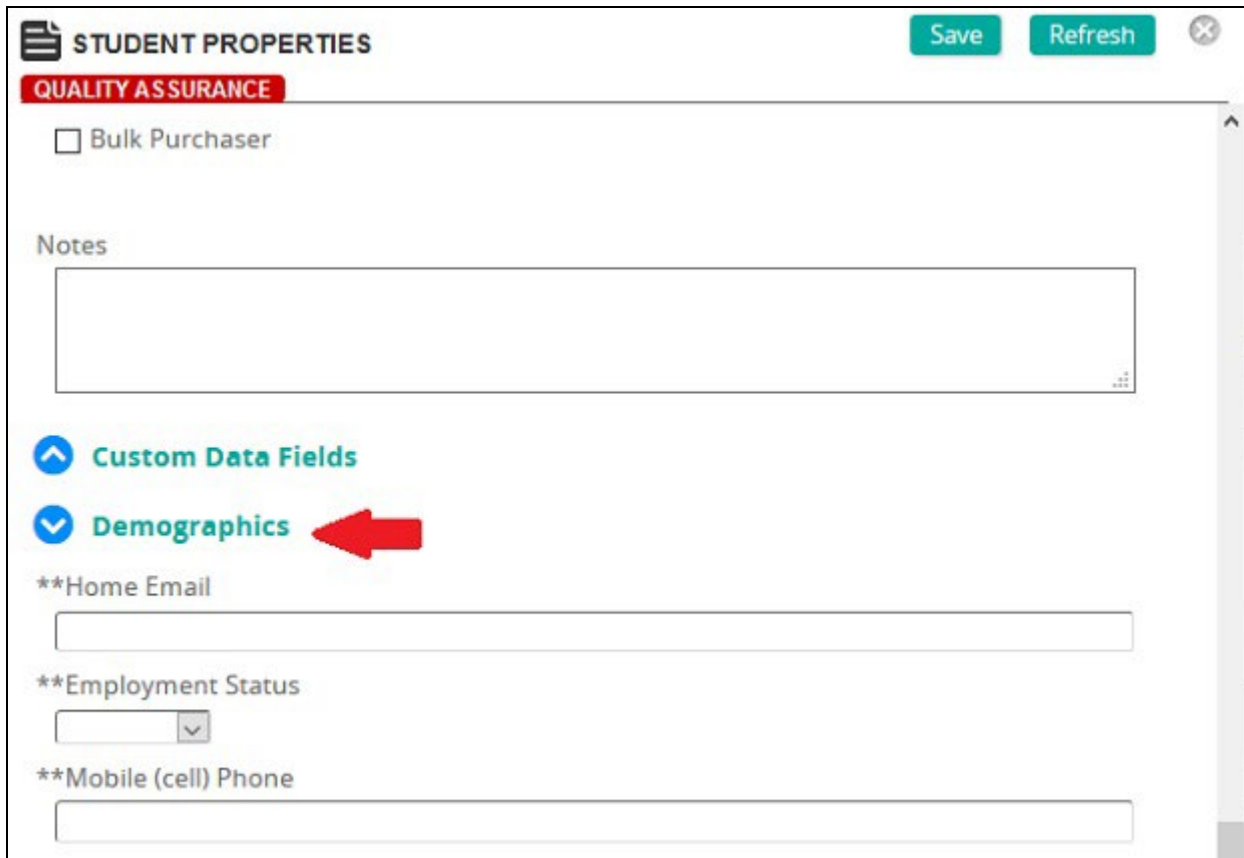
The Custom Data Fields page opens.

3. Click **Search** to display all existing custom data fields
4. In the list beside a custom data field, click  and then click **Properties**.
5. Make changes.
6. Click **Save**.

Delete a custom data field

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Custom Fields**.
The Custom Data Fields page opens.
3. Click **Search** to display all existing custom data fields
4. In the list beside a custom data field, click  and then click **Delete**.
5. At the confirmation deletion prompt, click **OK**.

Demographics



The screenshot shows a web form titled "STUDENT PROPERTIES" with "QUALITY ASSURANCE" as a sub-header. It includes a "Bulk Purchaser" checkbox, a "Notes" text area, and a list of sections: "Custom Data Fields" and "Demographics". The "Demographics" section is highlighted with a blue checkmark icon and a red arrow points to it. Below this section are three required fields: "**Home Email", "**Employment Status" (a dropdown menu), and "**Mobile (cell) Phone".

Demographics are special fields that appear on the student profile and are used to collect data from students. They can also be used as filters when searching and building reports. Demographic fields can be set to required or not required for every student. Demographic fields appear at the bottom of a student profile in the Demographics section.

Demographic fields can be almost anything. Some examples may be personal email, nickname, mobile phone, and so on.

Add a demographic data field

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Demographics**.

The Demographics page opens.

3. Click **Add**.

The Demographic Properties page opens.

4. Enter a name for the field.
5. (Optional) Enter a group name. A group name replaces the Demographics label on the student profile
6. Select the **Required** check box to make this field required (users must complete it) or leave unselected if not required.
7. Specify the order of appearance in the Demographics section on the student profile.
8. Enter a reference. A reference is often a shortened version of the field name.
9. Select a demographic type. Options:
 - Custom: Data is stored in the profile.
 - Linked: Data populates in Rival Learn. Select the field to link to.
10. Select a field type. Options:
 - Text Field
 - List
 - Boolean.
11. Click **Add**.

Edit a demographic data field

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Demographics**.

The Demographics page opens.

3. In the list beside a data field, click  and then click **Properties**.

The Demographic Properties page opens.

4. Make changes.
5. Click **Save**.

Delete a demographic data field

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Demographics**.

The Demographics page opens.

3. In the list beside a data field, click  and then click **Delete**.
4. Make changes.
5. At the confirmation deletion prompt, click **OK**.

Grading types

Grading types are used when students are assessed on assignments or other types of interventions. Here are the default grading types:

- **Complete/Incomplete:** This grading type can be used to record a pass/fail rating for any intervention (eCourse, training activity, assignment, or exam).
- **Percentage:** This grading type can be used to record a percentage value (0 – 100) for any intervention.
- **Checklist:** This grading type is used with checklists.

As an administrator, you can add more grading types like a rating scale or letter grade.

All grades are stored in the system as a real number value between 0 and 1. The grading type definition provides the rule to translate this value to the grading type.

Grading type	Value
Complete/Incomplete	0, 1
Percentage	Real number decimal
5 Point Rating	0.2, 0.4, 0.6, 0.8, 1
UMAS	0.25, 0.5, 0.75, 1

Add a grading type

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Grading Types**.

The Grading Types page opens.

3. Click **Add**.

The Grading Type Properties page opens.

4. Enter a title for the grading type.
5. From **Options**, click **Add**.

The Grading Type Option Properties page opens.

- a. In the **Name** text box, type the name of the grading type option.
 - b. In the **Mark** text box, type a numeric value.
 - c. Click **Add**.
 - d. Repeat for each option.
6. When done, click **Add**.

The new grading type is now available for administrators when assessing assignments.

Edit (modify) a grading type

- Modifying a grading type changes the way Rival Learn reports historical records.

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Grading Types**.

The Grading Types page opens.

3. Click **Search** to display all existing grading types.
4. In the list beside a grading type, click  and then click **Properties**.
5. In the Options list beside an option, click  and then click **Properties**.
6. Make changes.
7. At the warning message prompt, click **OK**.
8. Click **Save**.

Delete a grading type

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Grading Types**.

The Grading Types page opens.

3. Click **Search** to display all existing grading types.
4. In the list beside a grading type, click  and then click **Delete**.
5. At the confirmation deletion prompt, click **OK**.

HR Imports

The Importer is an easy-to-use utility that lets administrators import user and user course data into Rival Learn. The Importer supports importing the following data:

- Assignments
- Competencies
- eCourses
- Exams
- Requirements
- Training activities
- Users

The Importer shows a listing of all imports. At a glance, administrators can identify when the import occurred, status (in-configuration or completed), when the import was scheduled, and number of errors (if any). Administrators also use this page to:

- Upload an import file
- View details about import files
- Manage saved mapping configurations

Importer page

Importer

Search by file name

File Name

Status

Modified

Scheduled

Errors

sample data.csv

In Configuration

17-Nov-2022

--

Colsa Test file.csv

In Configuration

03-Mar-2022

--

Colsa Test file.csv

Completed

03-Mar-2022

03-Mar-2022

0

Colsa Test file.csv

Completed

03-Mar-2022

03-Mar-2022

0

userimporttest.csv

Completed

08-Feb-2022

08-Feb-2022

0

1 - 10 / 65

«

<

1

2

3

4

5

>

»

items / page

10

20

40

The Importer page shows a listing of all imports. At a glance, administrators can identify when the import occurred, status (in-configuration or completed), when the import was scheduled, and number of errors (if any). Administrators also use this page to:

- Upload an import file
- View details about import files
- Manage saved mapping configurations

Import data into Rival Learn

1. From the Student Portal from the navigation bar, click **Administration**. Click **Importer**.
Or
From the Administration Portal, click **Enterprise>Configuration>HR Imports**. Click **Importer**. Click **Launch Importer**.

The Importer page opens.

2. Click **+**.

The Importer Upload page opens:

Importer

Upload a file to import. Once you have selected your file click the "Next" button to configure your import mapping.

 Upload

Select a saved mapping configuration to use for this import.

-- Default Mapping --

Next

3. Click **Upload**.
4. On the File Upload pop-up, select a file and click **Open**.

Do one of the following:

- If this is the first import or you do not have a saved mapping configuration, leave the **Default Mapping** option selected.
 - If you want to reuse a saved mapping configuration for this import, select it from the drop-down.
5. Click **Next**.

The Configure Import Mapping page opens:

Configure Import Mapping

Validate

Schedule

Import File

User_1_test.csv

Import Type

User

Field Delimiter

Comma

Date Format

dd-MMM-yyyy h:mm a

☒ File Includes Column Headers

Field Mapping

Column	System Field	Row 1	Row 2	Row 3
1		First Name	Bobbi	Lawrence
2		Last Name	Cramer	Armani
3		Emp.ID	9999	8888
4		Login.code	bcramer	larmani

6. From the Import Type drop-down, select an import type:

- User
- Training Activity
- eCourse
- Exam
- Assignment
- Competency
- Requirement

Tip: The type you choose controls the system fields you can map to.

7. From the **Field Delimiter** drop-down, select the delimiter for the file.

8. If the import file contains column headings, leave the **File Includes Column Headers** check box selected. Otherwise, uncheck it.

9. Map the fields in the file to system fields. (If you want the system to ignore a field, select **Ignore Column**.)

Tip: If this is a common import, save the import mapping for future use. Click  and click **Save**. Give it a name and click **Save**.

10. Click **Validate**.

If there are problems with field mappings, a warning icon appears in those fields. Correct them and re-click **Validate**.

After a file is validated, you can click **Preview** to see what it will look like.

11. If you are satisfied the file is ready to import, click **Schedule**.

View an import log

- You can view an import log for imports with a Completed status.
- An import log shows date and time import was processed along with the number of records processed, updated, or skipped.

1. From the Importer page, click a file link in the File Name column.

The Importer Results page opens.

2. Click  and then click **View Import Log**.

Create a mapping from a previous mapping file

- If you saved mapping files from previous versions of the Importer tool to your computer, you can upload them into the new Importer.
- Once uploaded, the mapping files can be used for imports in the new Importer.

1. From the Importer page, click  and then click **Manage Saved Mapping Configurations**.

2. From the Saved Mapping Configurations page, click  and then click **Create Mapping From File**.

3. On the Create Mapping From File pop-up, click **Upload**.

4. On the File Upload pop-up, locate the mapping file and click **Open**.

5. Click **Restore**.

Utilities

Rival Learn utilities are additional features that can be configured for your site.

Note: You only see utilities features if you have privilege to view/edit the Enterprise>Configuration>Utilities page.

Life Suite user interface

The Student Portal user interface has a new look and it adapts to mobile devices. To switch to the new look, you must turn it on. If you do not like it, you can always turn it off. You can also preview if you are not certain you want to make the switch.

Features of the new look include:

- Responsive mobile design
- Dashboard
- Training List improvements

Preview the new responsive user interface

You can preview your current site in the new responsive user interface for one session. It is available until you close Rival Learn or log out.

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Utilities**.
Click the **Life Suite user interface** link.

A splash screen opens.
3. Click the preview link, or copy it and launch in a browser.

Note: Any changes made to data while in preview mode are saved.

Turn on the new responsive user interface

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Utilities**.
Click the **Life Suite user interface** link.

A splash screen opens.
3. Read about the features and current limitations of the new user interface.
4. Click **We are ready. Switch us now!**

Turn off the new responsive user interface

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Utilities**.
Click the **Life Suite user interface** link.

A splash page opens.
3. Click **We are not ready. Switch us back now!**

Pre-Defined Import Mapping Reference

After a Pre-Defined Import Mapping is defined for a site, you can use this utility to view the mappings.

Media Thumbnail Scan

This utility is not currently defined in this guide.

Purge User

Purge User functionality lets administrators remove user personal data from the system. This functionality is in response to European Union (EU) General Data Protection Regulation (GDPR) "right to be forgotten" requirement. That requirement gives individuals power to request the removal of their personal data when there is no compelling justification for its continued processing by a company.

Once purged, a user's data CANNOT be recovered. It's gone.

Data that is removed

Purging removes a user's personal information such as:

- Contact information (name, address, title and all contact details)
- Employment information (job, position, location, etc.)
- Course record data (completion, progress and enrollment records)

- Import and audit data (import audits, notifications audits, activity audit data)

Data that is kept

The system maintains some information for audit purposes (user ID, number of records purged, administrator who purged the data, and purge date). None of this audit data identifies a user in a meaningful way.

Purge a user from the system

- You must be an administrator with privilege to the Utilities tab to purge a user.
 - Purging *permanently* removes a user's personal information from the system. You cannot recover the data.
1. From the navigation bar, click **Enterprise**.
 2. Under Configuration, click **Utilities**.
 3. Click the **Purge User** link.

The Purge Users page opens.

4. Click **Add**.
5. Search for and select the employee to purge.
6. Click **Purge**.

A warning page appears.

7. Click **OK**.

Another warning page appears, alerting you that continuing will remove user's data from the system. (Cancel if you do not want to continue.)

8. Click **OK** to continue.

Purge User Personal Data page appears.

9. Click **OK**.

User is purged from the system.

Tip: Scheduled reports may contain personal data for this user. Run the report after removing this user to purge that data.

View users purged from the system

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Utilities**.
3. Click the **Purge User** link.

The Purge Users page opens.

4. Click **Search**.

Users purged from system are listed.

Tip: Enter search constraints to search for specific users.

Go1 integration setup

Users who are licensed to import Go1 courses will receive configuration setup information and license data to set up their Go1 Course Catalog Portal. A one-time setup is required to define the Go1 Content Portal, License Group ID, and Admin contact information.

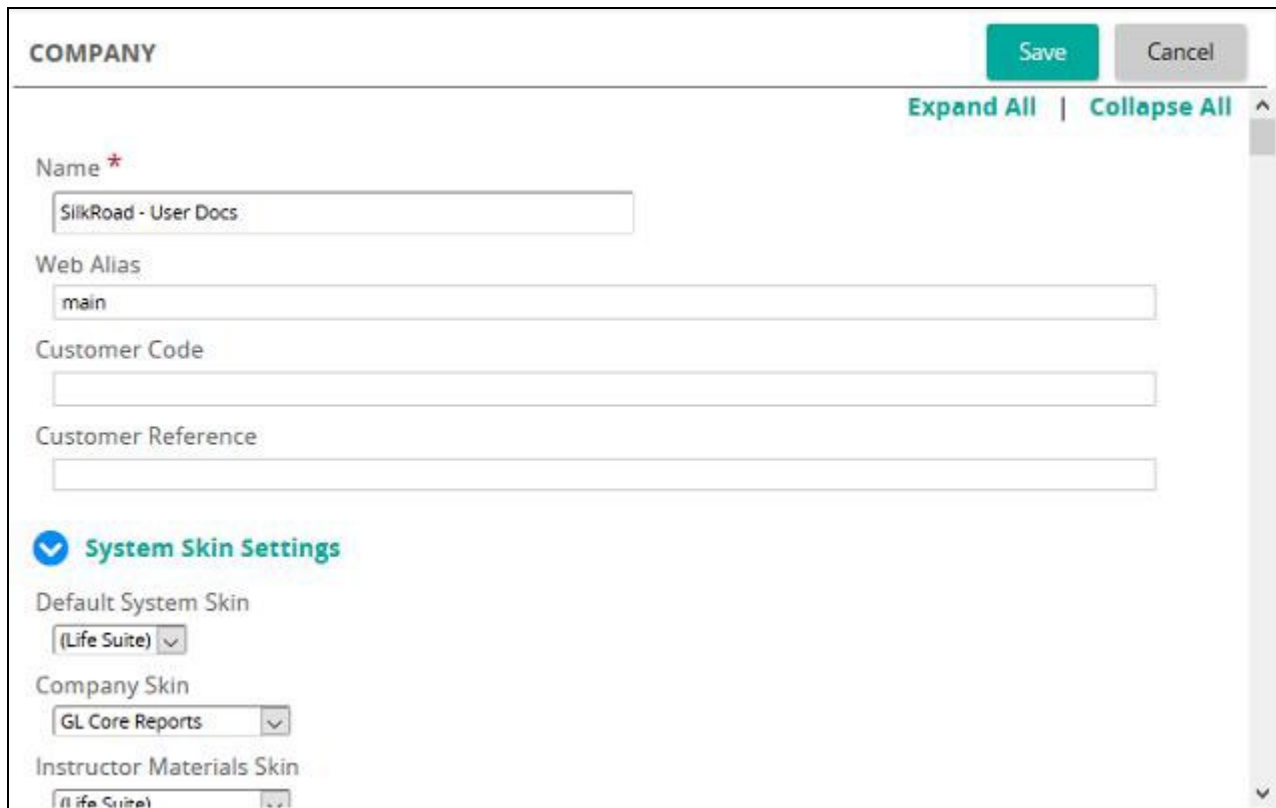
Perform Go1 integration setup

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Utilities**.
3. Click the **GO1 Integration Setup** link.
4. In the Customer Info section, enter portal name and group ID. Select industry name and country.
5. In the Portal Admin section, enter the email and contact information for the Go1 administrator at your site.
6. In the Consent section, click the check boxes after you read the privacy agreement, terms of service, and data collection rules.
7. Click **Submit**.

Settings

Settings define the global company settings in Rival Learn.

Company page



The screenshot shows the 'COMPANY' settings page in Rival Learn. At the top right are 'Save' and 'Cancel' buttons. Below them are 'Expand All' and 'Collapse All' links. The form contains several input fields: 'Name' (with a red asterisk) containing 'SilkRoad - User Docs', 'Web Alias' containing 'main', 'Customer Code', and 'Customer Reference'. A section titled 'System Skin Settings' with a blue checkmark icon contains three dropdown menus: 'Default System Skin' (set to '(Life Suite)'), 'Company Skin' (set to 'GL Core Reports'), and 'Instructor Materials Skin' (set to '(Life Suite)').

An administrator sets and maintains global company settings on the Company page.

Settings

Name: Type the name of your company.

Web Alias: The web alias name appears here.

System Skin Settings

Default System Skin: Select a specific skin to become the default system skin. The default system skin is the base skin used by Rival Learn when no other skin page is defined by either a company skin or materials skin. Rival Learn provides two interface options: Life Suite and Legacy.

Company Skin: Select a specific skin to become the company skin. The company skin is the skin used by Rival Learn whenever a default skin is identified.

Instructor Materials Skin: Select the default content object skin for training activity material attachments viewed from the Instructor My Teaching page.

Student Materials Skin: Select the default content object skin for training activity material attachments viewed by a student. This skin is used by Rival Learn whenever a student launches training activity material from their training page or from the catalog in the Student/Supervisor Portal.

User Interface Settings

Catalog Widget: To display the catalog widget on the Student Portal dashboard, check this option. You can then choose to display recommended courses or popular courses. If you choose recommended courses, add them to the Course Catalog Item list and put them in the order you want.

User Interface Settings: User interface settings control various functions within the selected skin. You can turn settings on or off. The settings are shown in the following table.

Setting	Description
Community	
Enable Community Link	Controls whether the Community link appears on the Student Content Viewer.
Enable Chat	Controls whether the chat function is available in the Administration portal.
Enable Forum	Controls whether the Forum is available.
Enable Messaging	Controls whether messaging is available.
Course Catalog	
Enable Team Enrollments	Controls whether a supervisor can enroll subordinates in in-class courses and online courses. If enabled (checked), the team enrollment feature is turned on and team enrollment icon appears in the course catalog. If not enabled, the feature is not available and the icon does not appear in the course catalog.
Always Show All Categories	If enabled, all available course catalog categories are shown all of the time in the course catalog. If not enabled, the category list can be expanded/collapsed.

Display Categories In Alphabetic Order	If enabled, shows categories in course catalog in alphabetical order rather than by number of items.
Student Homepage	
Homepage Menu	Controls the configuration of the Student homepage in the Student portal. You can assign or remove menu items (tiles) on the Student homepage and set the order of the tiles. You can do this for both the Life Suite and Legacy default skins. User interface settings can also be set for each Learning Center's Student homepage. Note: The My Training menu item must be the first menu item. You can reorder the remaining menu items as you want.
Show Print Certificate	Controls whether the Print Certificate button appears on the Student homepage.
Show Training Plan Report	Controls whether the Training Plan Report is available on the Student homepage.
Show Training History Report Link	Controls whether the History Report button appears on the Training History page.
Show Add Training Record Button	Controls whether the Add Training Record button is available on the Training History page.
Show Review Mode	Controls whether the Review Link is available for courses on the Training History page
Show Token Activation Code	Controls whether Token Activation Code entry is available on the My Training page. Token Activation is used for users to enter tokens provided by their administrator to access eCommerce Catalog Courses
Show New User Link on the Student Login	Controls whether New User link appears on the login page. New User link allows a user to set up user profile and security questions.
Use Legacy Checklist	Controls whether the legacy Checklist (pre-2019.2) or new Checklist (introduced in 2019.2) is used.
Student Reports	
Completion Certification Report	Select a default Completion Certification Report for the Student Portal.
History Report	Select a default History Report for the Student Portal.
ECommerce Catalog Invoice Report	Select a default ECommerce Catalog Invoice Report for the Student Portal.
Course Catalog Invoice Report	Select a default Course Catalog Invoice Report for the Student Portal.
Learning Journey Report	Select a default Learning Journey Report for the Student Portal.

Exam Results Report	Select an Exam Results Report for the Student Portal.
Admin Homepage	
Show Messaging	Controls whether the Messaging tile appears on the Rival Learn Admin home page.
Show Tasks	Controls whether the Tasks tile appears on the Rival Learn Admin home page.
Student Content	
Show Exam Results Report	Controls whether the Exam Results Report is available from the Test Summary page.
Show Next Link	Controls whether the Next link appears on the console banner.
Show Previous Link	Controls whether the Previous link appears on the console banner.
Show Glossary	Controls whether the Glossary tab appears on the console menu.
Show Search	Controls whether the Search tab appears on the console menu.
Show Study Aids	Controls whether the Show Study Aids tab appears on the console menu.
Show Features	Controls whether the Features tab appears on the console menu.
Show Menu Controls	Controls whether menu controls appear on the console menu.
eBusiness	
Show Ecom Course Description	Controls whether the Course Description appears in the eCommerce Catalog listing
Small Logo	To add a small logo to the login page and Student Portal home page, click  to search for and select an image. For best results, image should be 210 pixels by 72 pixels.
Large Logo	To add a large logo, click  to search for and select an image. For best results, image should be 445 pixels by 196 pixels.
Welcome Page	
These settings configure the top banner on the Student Portal. Leaving any setting blank causes the banner to display default values.	
Show Welcome Widget	Controls whether the top banner on the Student Portal is displayed.

Title	Enter a title. Leave this field blank to produce this default: Welcome to Rival Learn
Message	Enter text. This is typically welcome or introductory information. Tip: Some html tags are supported such as
, , , . Leave this field blank to produce this default: Rival Learn is your personalized learning portal to help you develop new skills, launch courses, enroll in classes, view learning journeys, and connect with peers. To get started, launch or schedule courses assigned to you on the My Training page or explore courses available by searching in the course catalog.
Background	To add a custom background image to appear behind the top banner text, click  to search for and select an image. Tip: To make the image appear after the message, add a few
 tags to end of message. Leave this field blank to go with default image.

Timezone: The default time zone for a site is shown here. This is the company-wide default time zone setting that is used for training event scheduling and when viewing.

Note: Rival Learn administrators cannot change the time zone setting. Only Rival support staff can change the time zone setting. To request a change to this setting, contact Rival support.

Mastery Mark Default: Select a mark default to be used if no mastery mark is set for competencies, requirements, or interventions in Qualifications or directly on an activity within a content object used in an eCourse.

Force End-User License Agreement (EULA) Acceptance: Select whether the EULA defined in the EULA Student skin page is displayed prior to students accessing content from their home page.

Concurrency Management Enabled: Select this check box to control whether Check-In/Check-Out function is enabled for content object authoring and media bank modification. Setting Concurrency Management to ON forces Check-In/Check-Out control when authoring content objects and modifying media objects. Only objects that are checked out can be modified. Only one user may modify a check-out object at a time. Ability to check-out an object is based on a combination of user privilege and check-out status.

Enable Multiple Report Windows: Select this check box to control the ability to open multiple report windows when viewing reports. Especially useful for viewing multiple reports for a single student in dynamic reports.

Contact Info

Email for Outages and Upgrades: Enter the email address(es) of people to contact when there are system outages and upgrades. Separate each address with a semicolon (;) to send to more than one email address or use your own distribution list.

Address Line 1-3: Enter the address of your organization.

City: Enter the city.

State/Province: Enter the state or province.

Country: Enter the country.

Zip/Postal Code: Enter the zip/postal code.

Telephone: Enter the telephone number.

Toll Free: If your organization has a toll free number, enter it.

Cellular: Enter a cellular (mobile) phone if applicable.

Fax: Enter a fax number.

Email: Enter an email address.

Billing Info

Type billing information for the company.

Support

Tech Support Name: Type the name of your company's technical support department. The value you enter appears in the Admin Help window.

Tech Support Phone: Type the phone number of your company's technical support department. The value you enter appears in the Admin Help window.

Tech Support Email: Type the email address of your company's technical support department. The value you enter appears in the Admin Help window.

Notification Settings

Default Email Format: The default email message format for all users in Rival Learn. Valid options are:

- Plain Text: Renders email in plain text.
- HTML: Renders email in HTML.

Note: This default applies unless a user's email format is implicitly set for his own account, for example on the Student Properties, User Properties, Administrator Properties, or Instructor Properties pages. A user's specific email format setting overrides this company-wide setting.

Enable Test Mode: Select this check box to turn on notification test mode. When turned on, recipient and sender addresses for all active notifications are replaced with test recipient and sender addresses so that notification messages can be tested and validated.

Test Mode Recipient Address: Enter the test mode recipient address for all active notifications

Test Mode Sender Address: Enter the test mode sender address for all active notifications.

Correspondence

Notification By: Select how notifications are sent. Options are internal, external, or internal+external.

Mail Prompt Options

Enable popup mail prompt for new messages: Select this check box to enable whether a popup reminder is used to notify users of new mail messages arriving for internal notifications and messages. Otherwise, leave unchecked.

Refresh rate: Enter the refresh rate for email, in minutes. The default is 1.

Miscellaneous

Personal Qualification Title: Type the default label used to describe Personal Qualification within student Personal Development Plan and Reports.

Enable Community Link: Select this check box to turn on internal mail/notifications or leave it unchecked to turn off internal mail/notifications.

Content

Content Workflow Stages: Use this section to set the content workflow to use when developing content in Rival Learn. Workflow stages are used in Rival Learn in content object properties. You can modify the workflow between Authoring (In Development), Staging (Content Review), or Library (Approved Content) and also create specific notifications for the content workflow.

Click **Add** to create a content workflow stage. Use the arrow up and down buttons to sequence the workflow stages.

Default Media Owner Workgroup: If you want to assign a default workgroup to new media after it is initially uploaded to the media bank, click  to search for and select one. Otherwise, leave blank.

Training Activity Types: Click **Add** to add a training activity type.

Regional Settings

Default Language: Select the default language for Rival Learn.

Short Date: Select the format of the company date (short date) as it will appear in Rival Learn for the language specified in the Default Language field. Each language can have its own short date format.

Long Date: Select the format of the company date (long date) as it will appear in Rival Learn for the language specified in the Default Language field. Each language can have its own long date format.

Short Time: Select the format of the company time (short time) as it will appear in Rival Learn for the language specified in the Default Language field. Each language can have its own short time format.

Long Time: Select the format of the company time (long time) as it will appear in Rival Learn for the language specified in the Default Language field. Each language can have its own long time format.

Available Countries: Shows the countries available from selection lists in Rival Learn. Click Add to add new countries to the list.

Account Management

Account Identification Fields: Account identification fields are used to validate users when they request a password change. Select the specific fields to combine with the LoginCode that users will be required to enter to validate a password change. From the Available list, select one or more fields and move them to the **Assigned** list.

Account Verification Mode: Select the mode used to verify accounts. Select one of these options:

- Security Questions: Forces a user to answer security questions to verify user account.
- Email Password Reset Link: This is the default and most often used. An active password reset notification must be created to use this function.

Number of Account Security Questions Users are required to Answer: Type the number of security questions a user is required to answer to verify account.

Account Security Questions Preview: Click to preview the security questions available.

User Login Attempts before Lockout: Type the number of attempts. This controls how many failed attempts users have before they will be locked out of Rival Learn.

Force Profile Completion On FIRST Login: Select this check box to force users to complete their profile prior to first login.

Force Profile Completion On NEXT Login: Select one of the following:

- **Force Updates** to reset ALL users to force completion of all required profile data fields prior to NEXT login.
- **Clear Forced Update** to clear forced update and allow all users to login without updating their profile.

Password Management

Minimum Password Length: Type the minimal accepted string length for all user passwords.

Must contain at least one upper and lower case character: To require that a password contain at least one upper and lowercase character, select this check box. Otherwise, leave unchecked.

Must contain at least one numeric character (0-9): To require that a password contain at least once numeric character, select this check box. Otherwise, leave unchecked.

Must contain one or more of the following special characters: To specify that a password contain one or more special characters, type those special characters in this text box. Otherwise, leave blank to not require specific special characters.

Enforce Password History: Type the number of passwords (0 to 24) Rival Learn remembers when users are required to change their password.

Note: Admin users with edit privilege on user properties have the ability to change any user's password. Changing a user password in the property sheet is interpreted as part of the password history for the user.

Password Expiration Period: Type the number of days passwords are valid (defaults to 0, indefinite).

Password Expiration Warning Period: Type the number of days prior to expiration that users will receive a warning to change their password on login.

Force Password Change on FIRST Login: Select this check box to force users to change their password prior to first login.

Force Password Change On NEXT Login: Select one of the following:

- **Force Update** to reset ALL users to force completion of all required Profile data fields prior to NEXT login.
- **Clear Forced Update** to clear forced update and allow all users to login without updating their profile.

User Session Management

Enable Auto Logout Feature: Select this check box to automatically log users out of Rival Learn when session time expires. Otherwise, leave unchecked.

Session Expiration: Type the number of minutes the session will expire without activity. The minimum value you can enter is 5 minutes.

Reporting

Report Logo: To link a company logo to Rival Learn reports, click  to search for and upload a logo from the Media/Asset Bank. For best results, the recommended image format and size is a jpeg file that is 165 pixels X 65 pixels.

Report Title Text - Level 3 Text: Select each of these report levels to set their respective colors.

View Sample: Click this button to view a sample of how the report will look.

Reset Defaults: Click this button to reset the custom report settings back to the original defaults.

Course Catalog Management

Enable Ecommerce: Select this check box to enable Ecommerce. If enabled, student users can buy course catalog items from the course catalog at the price indicated.

Note: No transactions can occur until a Paypal partner, merchant, and user account is entered and the processing mode is set to live.

Partner: Enter the name of your Ecommerce Paypal partner.

Merchant: Enter the merchant who handles your Paypal transactions.

User: Enter the user account associated with Ecommerce.

Processing Mode: Select one of the following:

- **Test:** Select this option while in testing mode.
- **Live:** Select this option after all your testing is complete, Ecommerce is working correctly, and you are ready to go live with Ecommerce.

External Authentication

If configured, external authentication allows students to choose from a list of configured external authentication services or Rival Learn credentials to log into Rival Learn. The selection choice is saved for future logins.

Name: Displays the name of the external authentication link as set up by an administrator.

Enabled: Select this check box to enable (turn on) external authentication.

Link Text: Link text helps students identify which credentials they will use to log into Rival Learn. For example, if Link Text is set to "Your Network ID", the instruction on the login page is "Log in using: Your Network ID".

Access and view global company settings

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Settings**.

The **Company page** (page 366) opens.

3. Scroll through the page to view the company settings.

Set or change a global company setting

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Settings**.

The **Company page** (page 366) opens.

3. Scroll the page to find the company setting.

Tip: For a list and definitions of company settings, refer to the **Company page settings** (page 366).

4. Set the global setting or change an existing global setting.
5. Click **Save**.

Set or change a user interface setting

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Settings**.

The **Company page** (page 366) opens.

3. Scroll to the System Skin Settings section.
4. Click **User Interface Settings**.

Tip: For definitions of user interface settings, refer to User Interface Settings.

5. Set the setting or change an existing setting.
6. Click **Save**.

Enter email addresses of people to notify of upgrades and outages

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Settings**.

The **Company page** (page 366) opens.

3. Scroll to the Contact Information section.
4. In the Email for Outages and Upgrades box, enter email addresses of people to contact when upgrades and/or outages occur.

Tip: Separate each address with a semicolon (;) to send to more than one email address or use your own distribution list.

5. Click **Save**.

Configure (enable) student ad-hoc assignment

Configuring student ad-hoc assignment allows students to record training that they received outside of Rival Learn to their training history. Students add these training records on the Training History page in the Rival Learn student portal.

To configure (turn on) student ad-hoc assignment, do the following:

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Settings**.

The **Company page** (page 366) opens.

3. Click **User Interface Settings**.

In the Student Homepage section, select the **Show Add Training Record Button** check box.

4. Click **Save**.

The Add Training Record button is now available on the Training History page in the Rival Learn student portal.

Configure categories to appear in alphabetical order in course catalog

- By default, course catalog categories are sorted by number of items. You can change the sort to alphabetical order with this option.

1. From the navigation bar, click **Enterprise**.

2. Under Configuration, click **Settings**.

The **Company page** (page 366) opens.

3. Click **User Interface Settings**.

In the Course Catalog section, select (check) the **Display Categories in Alphabetical Order** check box.

4. Click **Save**.

Configure (enable) team enrollment

1. From the navigation bar, click **Enterprise**.

2. Under Configuration, click **Settings**.

The **Company page** (page 366) opens.

3. Click **User Interface Settings**.

In the Course Catalog section, select (check) the **Enable Team Enrollments** check box.

4. Click **Save**.

Configure the tiles on Student Portal homepage

You can configure the tiles to appear on the Student homepage as well as set the order of tiles.

1. From the navigation bar, click **Enterprise**.

2. Under Configuration, click **Settings**.

The **Company page** (page 366) opens.

3. Click **User Interface Settings**.

4. Navigate to the Student Homepage section.

5. In the Homepage Menu Available list, click and move the menu items (tiles) you want to the Assigned list.

6. Use the up and down arrows to set the order of the menu items in the Assigned list.

Note: The My Training menu item must be the first menu item. You can reorder the remaining menu items as desired.

7. Click **Save**.

Customize the banner in the Student Portal

- You can customize the banner's title and message. The logo cannot be customized.

1. From the navigation bar, click **Enterprise**.

2. Under Configuration, click **Settings**.

The **Company page** (page 366) opens.

3. Click **User Interface Settings**.

4. Navigate to the Welcome Page section.

5. In the Title box, enter a title (such as company name) to appear in the banner.

6. In the Message box, enter text to appear in the banner.
7. Click **Save**.

Note To revert to default values, blank out your custom title or message.

Configure (enable) external authentication

1. From the navigation bar, click **Enterprise**.
2. Under Configuration, click **Settings**.
The **Company page** (page 366) opens.
3. Scroll to find the External Authentication group box.
4. Select (check) the **Enabled** check box.
5. In the Link Text box, type text to help students identify which credentials to use to log into Rival Learn.
For example, if Link Text is set to "Your Network ID", the instruction on the login page is "Log in using: Your Network ID".
6. Click **Save**.

Sequencing and navigation

In this section

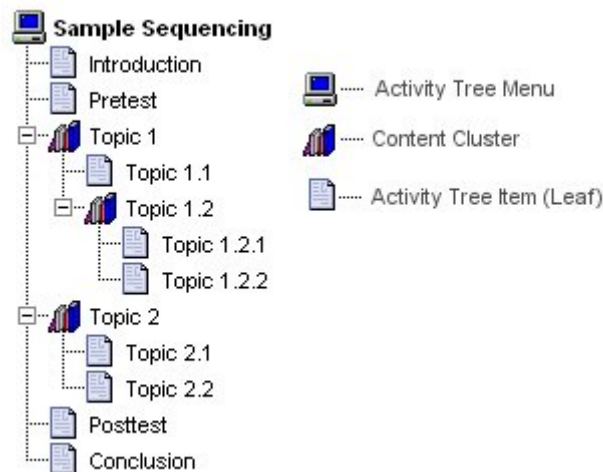
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Sequencing overview

Rival Learn conforms to the standards established by the IMS SS Specification that employs a rule-based sequencing model. Applying sequencing rules allows users to design learning activities in terms of clusters of content and apply rules that control the flow and choices for learners as they interact with the content. Content can be organized in many combinations of learning activities. In Rival Learn, learning activities combine to define an eCourse. An eCourse is a collection of one or more content objects that together generates an Activity Tree Menu. The Tree Menu consists of one or more Activity Tree Items (Leaf Items) and/or one or more Content Clusters. Content Clusters may contain one or more Activity Tree Items (Leaf Items) and/or other Content Clusters.

Activity Tree Menu	The Activity Tree Menu defines a meaningful unit of instruction that presents content to users and evaluates their understanding of the content.
Content Cluster	A Content Cluster is an Activity Tree Menu Item with sub-activities. A cluster consists of a single "Parent" item and all its immediate children. Content Clusters may contain combinations of one or more Activity Tree Items (Leaf) or other Content Clusters. Sequencing behavior for the cluster is described by the "Parent" of the cluster.
Activity Tree Item (Leaf)	An Activity Tree Item or Leaf is either an individual item in the Activity Tree Menu or a "Child" of a Content Cluster.

The following sample Rival Learn structure provides an example of these components used in an Activity Tree Menu:



The Activity Tree Menu is used to define the learning activities for users. Together with the Content Clusters and the Leaf Items, sequencing rules can be applied to define how users will access and navigate the content attached to the Activity Tree Items based on the objective status and progress on the activity. Rollup rules applied to content clusters define how status and progress are interpreted by each content cluster or the root content object.

Tracking information

For each learning activity in the Activity Tree Menu, Rival Learn tracks specific sequencing information about the activity and stores this data as the user interacts with content and navigates the Activity Tree.

Each Activity Tree Item may have one or more objectives associated to it. By default, each Activity has a "Local" Objective assigned as the "Primary Objective" that tracks the completion and progress status for the activity. One or more "Primary Objectives" may also be explicitly assigned to an activity, instead of the default objective. If one or more primary objectives are explicitly assigned, Rival Learn associates tracking information to these objectives.

There are four pieces of information stored for each activity:

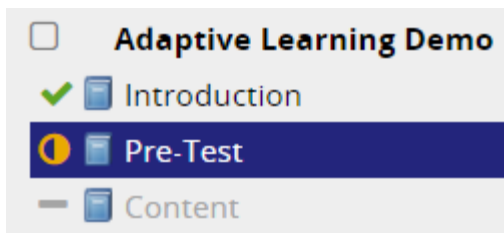
- **Activity Progress Information:** Describes the user's progress on the activity in terms of whether they have completed the activity or not.
- **Attempt Progress Information:** Describes the user's attempts on the activity in terms of how many times they have selected or navigated to the item.
- **Objective Progress Information:** Describes the user's progress on the activity in terms of the associated objective. This information may be in the form of a score value for the objective.
- **Progress Status Information:** Describes the user's status on the activity in terms of Known, Unknown; Attempted, Not Attempted; Complete, Incomplete; or Passed, Failed.

Visual display of progress

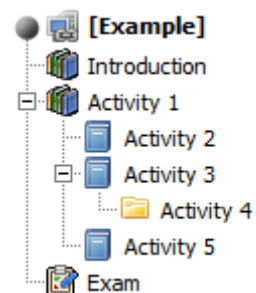
Rival Learn combines **attempt progress status** and **objective satisfied status** and uses the following colors to display status within the Activity Tree Menu.

Progress Complete	Objective Satisfied	Status
unknown	unknown	✓
unknown	passed	✓
unknown	failed	✓
false	unknown	✓
false	passed	✓
false	failed	✓
true	unknown	✓
true	passed	✓
true	failed	✗

This is an example of the colors being used in an Activity Tree Menu.



Rollup criteria



In any Rival Learn course, all activities are organized into clusters. A cluster consists of an activity and its immediate child activities. Each child activity contributes to the overall progress of the cluster. The process of calculating the overall contribution from all activities is called rollup. For example, consider this course structure:

The cluster Activity 1 consists of Activity 2, Activity 3, and Activity 5.

The student tracking data measures two main things:

- Whether course material was experienced by the learner, and
- Whether that material was also mastered by the learner.

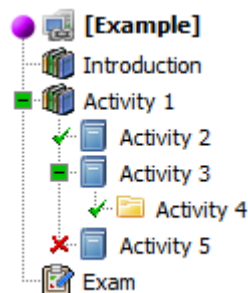
In each case, SCORM (and Rival Learn) provides ways to calculate partial completion and partial mastery (score).

Content authors may wish to ignore contributions to overall completion and mastery from certain activities. There are 3 components used to include and/or exclude contributions from each activity during rollup.

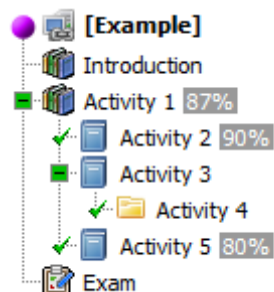
- **Rollup Objective Satisfied** – when true, mastery of this activity will contribute to the overall mastery of the cluster.
- **Rollup Progress Completion** – when true, completion of this activity will contribute to the overall completion of the cluster.
- **Rollup Objective Measure Weight** – this is multiplied with the score to calculate the contribution of the activity score to the overall score (measure) of the cluster. All contributions are then summed and divided by the total weights of all activities to calculate the cluster score.

In general, Rival Learn is only concerned with mastery. A course is considered mastered when overall rollup of all course activities determines that the root activity has become mastered. Although completion is tracked and can be reported on, it is not otherwise a factor in overall course rollup.

A couple of examples will help illustrate how Rival Learn calculates rollup:



In this example, *Rollup Objective Satisfied* is true for **Activity 2** and **Activity 3** (the Activities are Passed/Mastered), but false for **Activity 5**. **Activity 5** is excluded from consideration for rollup of the cluster and so **Activity 1** is marked as mastered.



In this example, **Activity 2** has a *Rollup Objective Measure Weight* of 1.0 and **Activity 5** has a *Rollup Objective Measure Weight* of 0.5. **Activity 3** has a *Rollup Objective Measure Weight* of 0.0. Thus the overall score of the **Activity 1** cluster is: $(90 \times 1.0 + 80 \times 0.5) / (1.0 + 0.5) = 130 / 1.5 = 87\%$.

Activity setting templates

The settings for each rollup criteria are set within the Activity Settings area. Rival Learn provides several templates for the *Rollup Control* settings under *Required / Scored* in *Activity Settings*. You can modify the settings individually by choosing *User Defined* from the *Required / Scored* drop list.

There are 5 possible settings.

Activity is NOT Required OR Scored

Activity is an optional item that does not contribute to progress or score.


Activity Settings

Required / Scored

Activity is NOT Required OR Scored

☐ Rollup Objective Satisfied
 ☐ Rollup Progress Completion

Rollup Objective Measure Weight

0

☐ Satisfied by Measure
 ☒ Visible in Student Activity Tree

Activity is Required

Activity is a required item that must be MASTERED as part of the parent activity (cluster) to become MASTERED. To ensure rollup to all parent activities, all ancestors must also be set to Required.


Activity Settings

Required / Scored

Activity is Required

Note: Setting this activity as required means that it is required for its *parent activity (cluster)* to become completed and satisfied. If you wish success in this activity to be required by the whole tree, set its parent and all its other ancestors to be required as well.

(Setting an activity as required is equivalent to setting both its *Rollup Objective Satisfied* and *Rollup Progress Completion* to true.)

☒ Rollup Objective Satisfied
 ☒ Rollup Progress Completion

Rollup Objective Measure Weight

0

☐ Satisfied by Measure
 ☒ Visible in Student Activity Tree

Activity is Required AND Scored

Activity is a required item that must be MASTERED as part of the parent activity (cluster) to become MASTERED and its scored value will be used to calculate the overall score for its parent activity (cluster). The Rollup Objective Measure Weight for this activity and all its ancestors must be set to a non-zero value to contribute score to the entire eCourse.


Activity Settings

Required / Scored

Activity is Required AND Scored

Note: Setting this activity as required means that it is required for its parent activity (cluster) to become completed and satisfied. If you wish success in this activity to be required by the whole tree, set its parent and all its other ancestors to be required as well.

(Setting an activity as required is equivalent to setting both its *Rollup Objective Satisfied* and *Rollup Progress Completion* to true.)

Note: Setting this activity as Scored will only cause its score to be used in the calculation of the total score for its parent activity (cluster).

If you wish this activity's score to be used in the calculation of the score for the entire course, set the *Rollup Objective Measure Weight* of its parent and all of its other ancestors to 1 (or any real number between -1 and 1).

☒ Rollup Objective Satisfied
 ☒ Rollup Progress Completion

Rollup Objective Measure Weight

1

☒ Satisfied by Measure
 ☐ Use Default Required Mark

Required Mark (%)

100.0000

Required Mark is equivalent to the SCORM value Minimum Normalized Measure but is expressed here as a percentage. (This value is ignored unless Satisfied by Measure is true.)

☒ Visible in Student Activity Tree

With *Use Default Required Mark* set to ON, the activity Objective Status will be determined based on the default required mark set by the company default or the student Qualification. With *Use Default Required Mark* set to OFF, the activity Objective Status will be determined based on the Required Mark entered for the Activity.

SCORM Default

The SCORM default setting is the default setting used for content objects to rollup the Objective Satisfied status, Progress Completion status, and 100% (Objective Measure Weight) of all Scored values from child activities that are Scored. The SCORM default does not calculate Objective satisfaction based on any scored values, it only rolls up scored values from its child activities.


Activity Settings

Required / Scored

SCORM Default

☒ Rollup Objective Satisfied

☒ Rollup Progress Completion

Rollup Objective Measure Weight

1

☐ Satisfied by Measure

☒ Visible in Student Activity Tree

User Defined

Activity Settings for rollup satisfied status, progress completion, weight, scored setting, and required pass mark can be independently set to any value.


Activity Settings

Required / Scored

User Defined

☒ Rollup Objective Satisfied

☒ Rollup Progress Completion

Rollup Objective Measure Weight

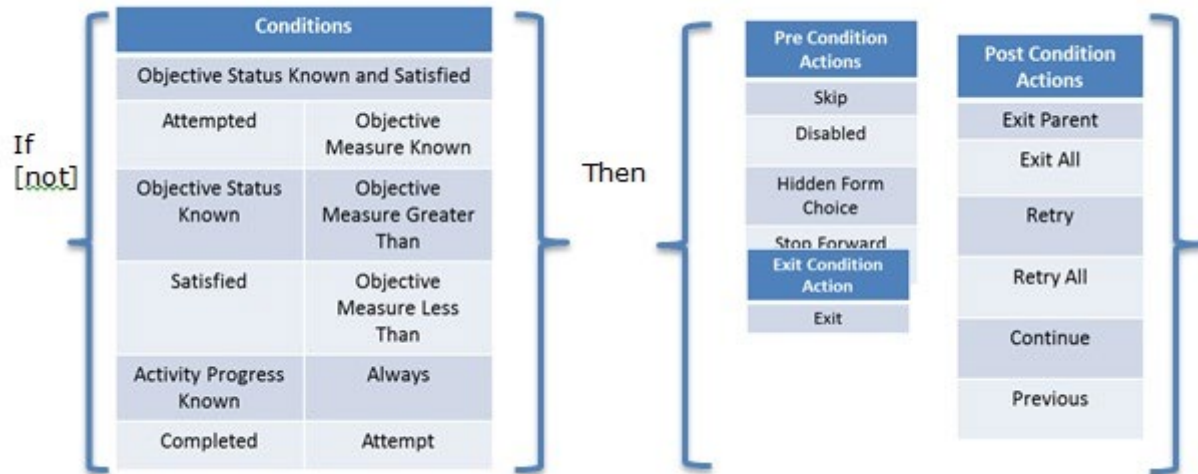
1

☐ Satisfied by Measure

☒ Visible in Student Activity Tree

Using sequencing rules

Sequencing Rules may be applied to any Activity Tree Item in a content object and these rules are evaluated at specified times during user navigation of the object. Each Sequencing Rule consists of a set of conditions and a corresponding action. The conditions are evaluated using the tracking information associated with the tree menu item. The behavior associated with the rule's action is performed if the rule's condition-set evaluates to True. The following represents the structure (if (not) [condition-set] then [action]) of a Sequencing Rule.



Primary Objective

Each tree menu item by default references a "Local" Primary Objective. This objective can be used to evaluate a sequencing rule on the current activity by referencing the Primary Objective in the rule. Alternatively, a tree menu item MAY reference one or more objectives that can be used to evaluate a sequencing rule on any other tree menu item in the object. The Primary Objective can be assigned by mapping the tree menu item to the local Primary Objective so it can be shared with other activities in the tree, or to one or more defined enabling objectives within Rival Learn. The status of any mapped objective is determined by the status of the current activity local objective.

Alternatively, any Rival Learn exam can be used to set the measure and status for all referenced enabling objectives within the exam. Sequencing rules associated to a referenced objective will be evaluated based on the current status of the referenced objective determined by its association as a Primary Objective for a tree menu item or its current status as an outcome of an exam result.

Default Primary Objective

A default primary objective is automatically created for the activity. Objective maps are automatically generated from sequencing and rollup rules. Rollup contribution is managed by the *Required* and *Scored* settings for the activity. With *Scored* on, the primary objective will be satisfied when its score (measure) is greater than or equal to the Required Mark (Minimum Normalized Measure).

Primary Objective Map

You can also map one or more objectives to any activity. This provides a mechanism to share objective data with other activities in the tree and to create sequencing rules based on these mapped objectives.


Objectives

A default primary objective will be created for this activity.

Local Reference (ID)

Primary Objective Map

☒	Target Objective	Read Satisfied	Read Normalized	Write Satisfied	Write Normalized
(none)					

Total: 0

Add

Remove Selected

Mark All

Enabling objectives used in sequencing will be automatically mapped based on this activity's content type. User defined local objectives and maps may be defined below, and will be appended to the defaults.

Objectives

☒	Local Reference (ID)
(none)	

Total: 0

Add

Remove Selected

Mark All

Use *Local Reference (ID)* to identify and map a local objective to be shared with other activities in the tree. To add a primary objective map, select the **Add** button:


OBJECTIVE MAP PROPERTIES

Add Refresh

QUALITY ASSURANCE

Map Type

Objective

Target Objective *

(none)

☒ Read Satisfied
☒ Read Normalized
☐ Write Satisfied
☐ Write Normalized

By default the READ settings are set to ON and the WRITE settings are set to OFF. Adjust these settings to suit your needs:

- The Satisfied value is a Boolean value (1 or 0) based on whether the objective satisfies the mastery setting.
- The Normalized value is a Real Number value (-1.0 - +1.0) based on the score for the objective.
- The Read setting reads the current value for the session.
- The Write setting writes the current value for the session to the objective variable.

Objective Map

To associate any Rival Learn enabling objective as a Primary Objective, select Objective as the Map type and then link to the appropriate objective. Set the Read/Write Satisfied and/or Normalized as appropriate.


OBJECTIVE MAP PROPERTIES

Add Refresh

QUALITY ASSURANCE

Map Type

Objective

Target Objective *

(none) 🔍

☒ Read Satisfied
☒ Read Normalized
☐ Write Satisfied
☐ Write Normalized

Local Reference Objective Map

To associate any Local Referenced objective as a Primary Objective, select By Reference as the Map type and then enter the Reference ID. Set the Read/Write Satisfied and/or Normalized as appropriate.


OBJECTIVE MAP PROPERTIES

Add Refresh

QUALITY ASSURANCE

Map Type

By Reference

Reference

(none)

New Reference *

☒ Read Satisfied
☒ Read Normalized
☐ Write Satisfied
☐ Write Normalized

Sequencing and navigation rules

Sequencing and navigation rules are used to modify the state of the activity tree to control access to the activity content. Each sequencing rule must be defined based on an objective map. By default, sequencing rules can be defined based on a local primary objective for the activity, or one or more Rival Learn enabling objectives. In this case, an explicit objective map is not required.



Sequencing Rules

Sequencing Rules

☒ Rule Type	Rule Action
(none)	

Total: 0

Sequencing Objective Map

You can map one or more objectives to be used to define sequencing and navigation rules.

To map an objective:

1. Select the **Add** button below the Objectives list.
2. Enter a **Local Reference (ID)** to identify the objective map. This is the Local Reference that can be used in the sequencing rule definition.
3. Select **Add** to add the objective map:
4. Select the **Map Type** (*Objective* or *By Reference*). Select *Objective* to map a specific enabling objective defined in Rival Learn. Select *By Reference* to map a shared local objective from a mapped local objective.
5. Set the Read/Write status for Satisfied or Normalized as appropriate.
6. Select **Add** to add the mapping.
7. Continue to Add additional objective maps as required.

Sample Sequencing Objective Map

The following shows a Local Reference objective labeled *ContentRollup* that is mapped By Reference to a shared objective named *Content*.



ACTIVITY OBJECTIVE PROPERTIES Add Refresh ✕

QUALITY ASSURANCE

Local Reference (ID) *

☐ Satisfied By Measure

Objective Map

☒	Target Objective	Read Satisfied	Read Normalized	Write Satisfied	Write Normalized	
☐	AICC Learning Objective	Yes	Yes	No	No	

Add Remove Selected Mark All

Here the Local Objective *ContentRollup* is used to define a sequencing rule based on the value of another Locally Shared objective named *Content*. The mapping is set to READ the Satisfied status of the shared local objective.

Sequencing Rule Combinations

Individual rule conditions can be combined to create a set of conditions for evaluation such that any one individual condition must be True or all conditions must be True for the resulting action to be triggered. The Rule Combinations may specify that ALL rules or ANY rules apply:

- **All (default value)** – The condition set evaluates to True if and only if *all* of its individual **conditions** evaluate to True. Acts as a logical *And*.
- **Any** – The condition set evaluates to True if *any* of the individual conditions evaluates to True. Acts as a logical *Or*.

To add a rule condition:

1. Select the Add button below the Rules list.

2. Select the **Rule Type** from the Sequencing Rule Properties


SEQUENCING RULE PROPERTIES

Add Refresh

QUALITY ASSURANCE

Rule Type

Pre Condition

Conditions

☒
Condition Text

(none)

Total: 0

Add Remove Selected Mark All

Combination

ANY Condition Match Will Trigger Action

Rule Action

Skip

- **Pre Condition** (default) – The Pre Condition rule is evaluated BEFORE any users navigate to the tree menu item. Pre Conditions set the state of the tree menu based on the current status of the condition. Pre Conditions may have the following actions:
- **Skip:** Users may navigate manually to the item but will skip over the item when navigating using the user interface controls.
- **Disable:** Item may not be selected or navigated to by users.
- **Hidden from Choice:** Item can be navigated to but cannot be selected manually by users
- **Stop Forward Traversal:** Item cannot be navigated past when selected.
- **Post Condition** – The Post Condition rule is evaluated AFTER users have completed the tree menu item. Post Condition actions navigate users away from the tree menu item. Post Conditions may have the following actions:
- **Exit Parent:** Exit current activity's parent and display next active activity.
- **Exit All:** Close object and all linked objects.
- **Retry:** Retry current activity or cluster.
- **Retry All:** Retry from beginning of object as a new attempt on the object.

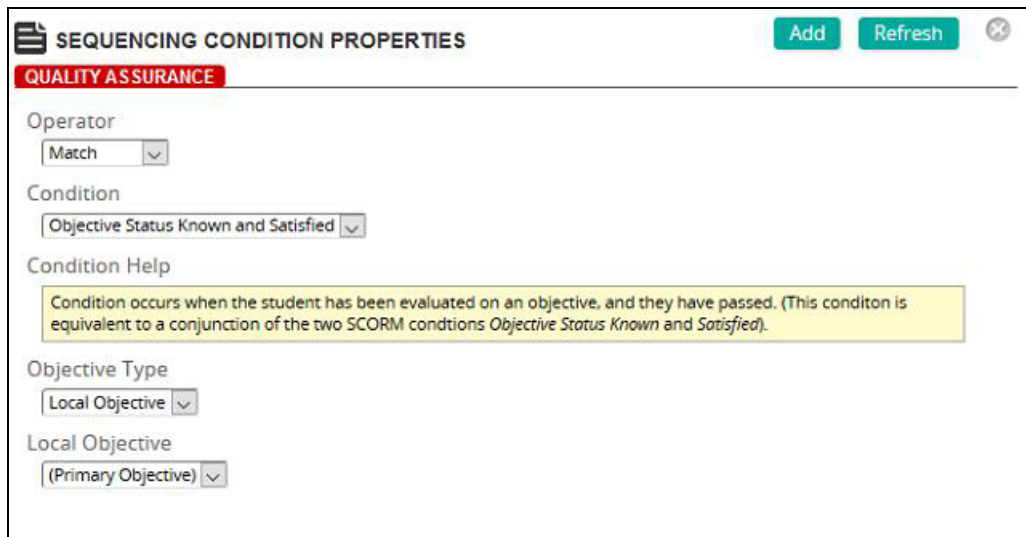
- **Continue:** Navigate Forward to the next active activity.
 - **Previous:** Navigate Backward to the next previous active activity.
 - **Exit Condition:** The Exit Condition rule closes the content object. It has one action only:
 - **Exit:** Close object and all linked objects.
3. Add one or more conditions to the rule.
 4. Select the **Add** button to add the rule to the Rule list.

Sequencing rule conditions

The Rules list may contain a set of conditions that are evaluated in the context of the activity for which the sequencing rule is defined. To add a condition:

1. Select the **Add** button below the condition list.

The Sequencing Condition Properties page opens.



2. Set the Condition Operator:
 - **Match:** Condition "Matches" or is TRUE.
 - **NOT Match:** Condition "DOES NOT Match" or is FALSE.
3. Select the Condition:

Condition	Description
Known and Satisfied	The Condition evaluates to True if the Objective Progress Status for the objective associated with the activity (indicated by the Rule Condition Referenced Objective) is True and the Objective Satisfied Status for the objective associated with the activity (indicated by the Rule Condition Referenced Objective) is True. This is equivalent to the conjunction of the Objective Status Known condition and Satisfied condition and is most often used with the negative condition. (See NOTE below)
Satisfied	The Condition evaluates to True if the Objective Satisfied Status for the objective associated with the activity (indicated by the Rule Condition Referenced Objective) is True.

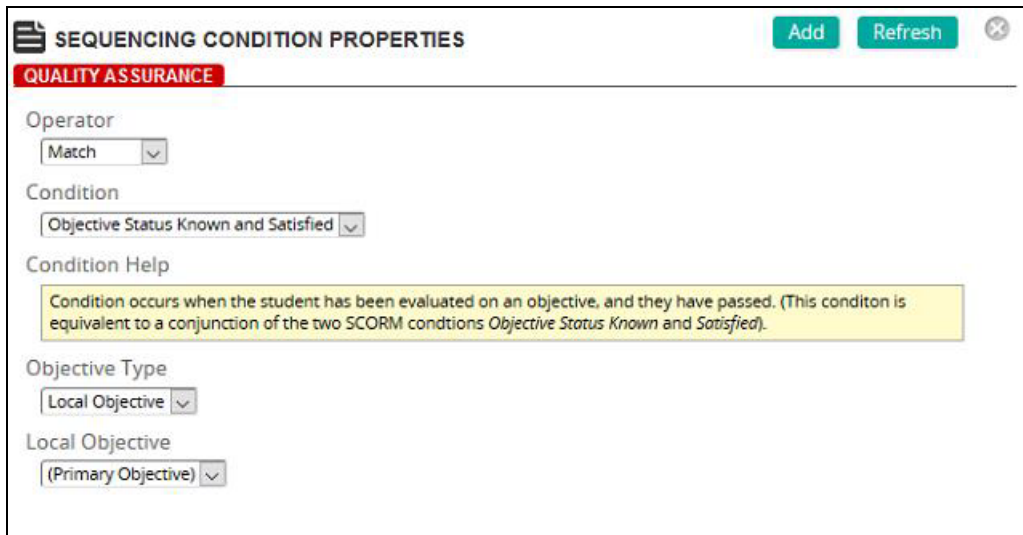
Condition	Description
Objective Status Known	The Condition evaluates to True if the Objective Progress Status for the objective associated with the activity (indicated by Rule Condition Referenced Objective) is True.
Objective Measure Known	The Condition evaluates to True if the Objective Progress Status for the objective associated with the activity (indicated by Rule Condition Referenced Objective) is True and the Objective Measure Status for the objective associated with the activity (indicated by Rule Condition Referenced Objective) is True.
Objective Measure Greater Than	The Condition evaluates to True if the Objective Measure Status for the objective associated with the activity (indicated by the Rule Condition Referenced Objective) is True and the Objective Normalized Measure for the objective associated with the activity (indicated by Rule Condition Referenced Objective) is greater than the Rule Condition Measure Threshold.
Objective Measure Less Than	The Condition evaluates to True if the Objective Measure Status for the objective associated with the activity (indicated by Rule Condition Referenced Objective) is True and the Objective Normalized Measure for the objective associated with the activity (indicated by Rule Condition Referenced Objective) is less than the Rule Condition Measure Threshold.
Completed	The Condition evaluates to True if the Attempt Progress Status for the activity is True and the Attempt Completion Status for the activity is True.
Activity Progress Known	The Condition evaluates to True if the Activity Progress Status for the activity is True and the Attempt Progress Status for the activity is True.
Attempted	The Condition evaluates to True if the Activity Progress Status for the activity is True and Activity Attempt Count for the activity is positive (i.e., the activity has been attempted).
Attempt Limit Exceeded	The Condition evaluates to True if Activity Progress Status for the activity is True and the Limit Condition Attempt Limit Control for the activity is True and the Activity Attempt Count for the activity is equal to or greater than the Limit Condition Attempt Limit for the activity.
Always	The Condition always evaluates to True.

The "Objective Status Known and Satisfied" is a special condition created in Rival Learn. By default, this status is equivalent to the "Satisfied" condition unless it is negated. In SCORM, a negated "Satisfied" condition checks whether the status is NOT Satisfied and ONLY NOT satisfied. SCORM does not check whether the status is also NOT Known. Using the negation of the "Objective Status Known and Satisfied" is a short cut within Rival Learn to provide a way to check the ANY condition "Is the Status NOT Satisfied OR NOT Known". For additional information, see deMorgan's Laws

Objectives used in the condition may be a Local Objective (i.e. the Primary Objective for the activity), a Shared Local Objective (i.e. a Local Objective from another activity in the objective that is mapped in the objective map), or a Rival Learn Objective (i.e. an enabling objective defined in Rival Learn).

Local Objective Condition

Local Objective conditions may be the Primary Objective for the activity or a Shared Local Objective mapped to the sequencing rule. In this example, a Shared Local Objective named *ContentRollup* has been mapped to the Sequencing rule and is available as a Local Objective for the Condition.



SEQUENCING CONDITION PROPERTIES [Add] [Refresh] [X]

QUALITY ASSURANCE

Operator
Match

Condition
Objective Status Known and Satisfied

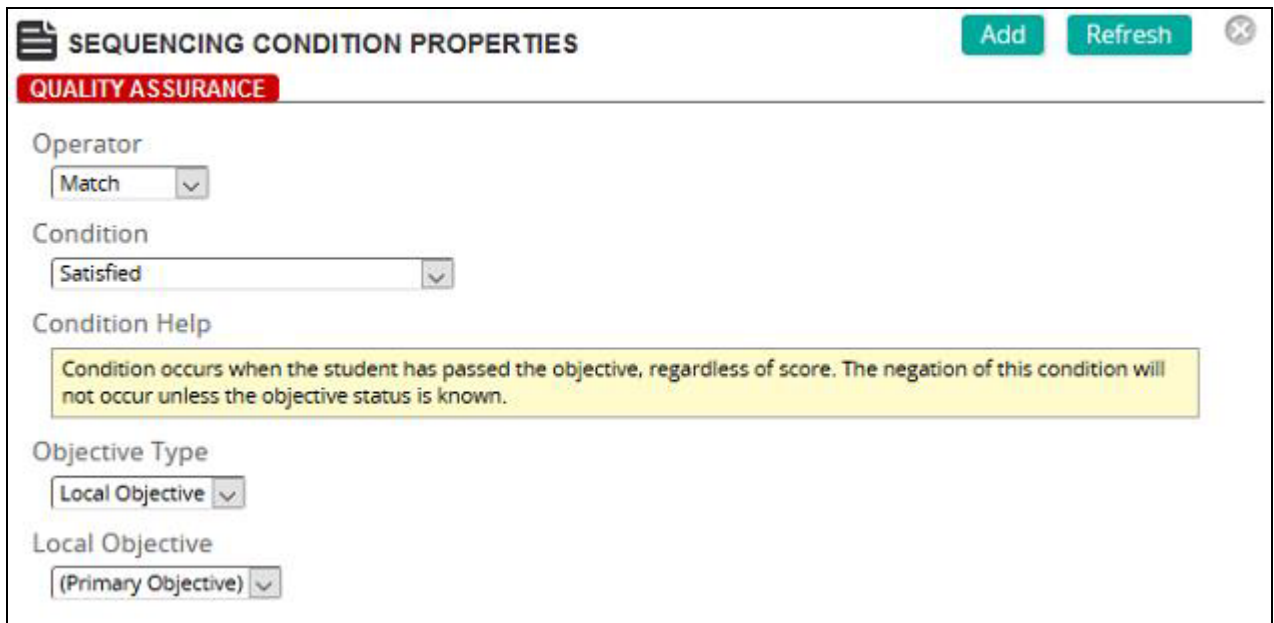
Condition Help
Condition occurs when the student has been evaluated on an objective, and they have passed. (This condition is equivalent to a conjunction of the two SCORM conditions *Objective Status Known* and *Satisfied*).

Objective Type
Local Objective

Local Objective
(Primary Objective)

Objective Condition

A Rival Learn Objective condition can also be defined using any defined enabling objective. Select *Rival Learn Objective* as the objective type and then link to the appropriate objective.



SEQUENCING CONDITION PROPERTIES [Add] [Refresh] [X]

QUALITY ASSURANCE

Operator
Match

Condition
Satisfied

Condition Help
Condition occurs when the student has passed the objective, regardless of score. The negation of this condition will not occur unless the objective status is known.

Objective Type
Local Objective

Local Objective
(Primary Objective)

1. Click **Add** to add the condition to the condition list.

Sequencing rule actions

Each condition when TRUE triggers an action.

1. Select the action from the action drop down list for each condition.


SEQUENCING RULE PROPERTIES

Save
Refresh
Close

QUALITY ASSURANCE

Rule Type
Pre Condition

Conditions

☒
Condition Text

(none)

Total: 0

Add
Remove Selected
Mark All

Combination
ANY Condition Match Will Trigger Action

Rule Action
Skip

Sequencing Control Modes

Sequencing control settings provide a way to set rules for accessing content in the tree. The control settings available depend on whether the activity is a parent cluster or a child within a cluster

Cluster Parent Controls

A parent activity allows control over the following:

▼

Sequencing Control Modes

☒
Choice Permitted

☒
Exit Permitted

☒
Flow Permitted

☐
Forward Only

Set *Use Current Attempt Objective Info* and *Use Current Attempt Progress Info* to ON to ignore previous attempt data during rollup.

☐
Use Current Attempt Objective Info

☐
Use Current Attempt Progress Info

Choice Permitted

Allows users the ability to select the item randomly from the tree menu. When OFF, users cannot choose the activity by selecting it, but can "Flow" (e.g. selecting Previous/Continue) to the activity

Exit Permitted

Users may exit the item at any time. When OFF, users can exit the activity using a navigation "Flow" (e.g. selecting Previous/Continue), but cannot exit with a navigation "Choice" (selecting another activity) unless the activity selected is a child activity in the cluster.

Flow Permitted

Users may move to the item on a forward or back selection. When OFF, users cannot "Flow" (e.g. selecting Previous/Continue) to the activity, but can choose the activity by selecting it.

Forward Only

Users may ONLY access the item by navigating forward or selecting an activity from a previous activity in the tree and can only exit the activity by navigating forward. Users can only advance forward of the current activity using either a "Flow" (navigating forward) or "Choice" (selecting an activity forward) function.

Use Current Attempt Objective Info

Defines how the objective progress will be managed for the child items. Defaults to OFF. If OFF, the Objective Progress Information from the most recent attempt on the item's child activities will be used, even if that information was recorded during the previous attempt on the cluster.

Use Current Attempt Progress Info

Defines how the attempt progress will be managed for the child items. Defaults to OFF. If OFF, the Attempt Progress Information from the most recent attempt on the item's child activities will be used, even if that information was recorded during the previous attempt on the cluster.

Cluster Child Controls

A child activity only allows control over a single value.

Exit Permitted

Users may exit the item at any time. When OFF, users can exit the activity using a navigation "Flow" (e.g. selecting Previous/Continue), but cannot exit with a navigation "Choice" (selecting another activity).

Using rollup rules

Rollup rules can be set for any parent tree item to define behavior for the parent based on the status of the child items. Child items can be set to rollup values for objective satisfied, progress completion, and attempts. Default Rollup Rules are applied in a specific order when *Use Default Rollup Rules* is set to ON:

- If ALL child objectives NOT Satisfied OR Attempted then cluster objective NOT Satisfied
- If ALL child objectives Satisfied then cluster objective Satisfied
- If ALL child progress NOT Completed OR Attempted then cluster progress Incomplete
- If ALL child progress Completed then cluster progress Completed


Rollup Rules

Rollup rules are as defined below. If no rollup rules are defined that have the actions *satisfied* or *not satisfied*, the default primary objective rollup rules are:

- If ALL child objectives **Objective Status Known** then cluster objective **Not Satisfied**
- If ALL child objectives **Satisfied** then cluster objective **Satisfied**

If no rollup rules are defined on the activity that have the actions *complete* or *incomplete*, the default attempt completion rollup rules are:

- If ALL child progress **Activity Progress Known** then cluster progress **Incomplete**
- If ALL child progress **Completed** then cluster progress **Completed**

Rollup Rules

☒	Child Set	Action
(none)		
Total: 0		

Add

Remove Selected

Mark All

Users can define specific rollup rules for the cluster if required.

If no rollup rules are defined that have the actions satisfied or not satisfied, the default rollup rules are:

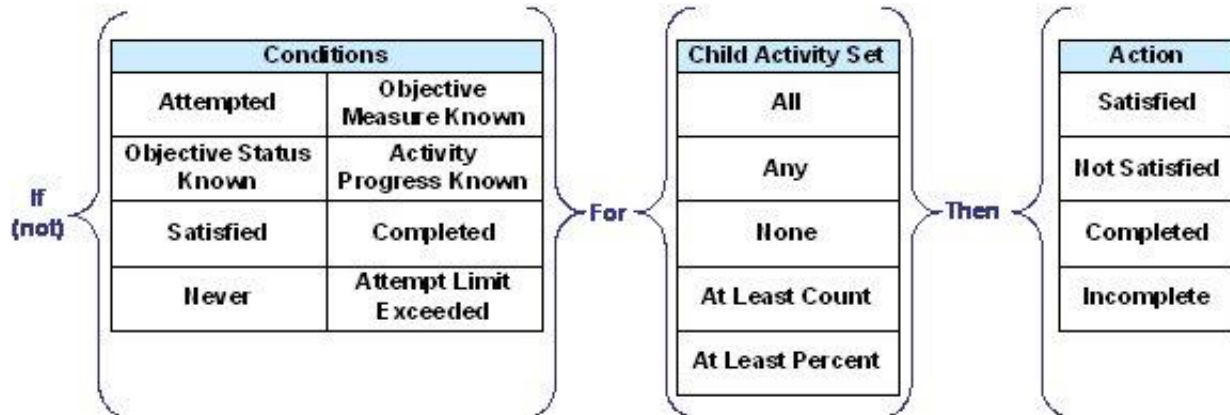
- If ALL child objectives NOT Satisfied OR Attempted then cluster objective Not Satisfied

- If ALL child objectives Satisfied then cluster objective Satisfied

If no rollup rules are defined on the activity that have the actions complete or incomplete, the default rollup rules are:

- If ALL child progress NOT Completed OR Attempted then cluster progress Incomplete
- If ALL child progress Completed then cluster progress Completed

Like sequencing rules, Rollup rules can be assigned to a parent cluster item to define the status of the parent based on the current state of one or more child items.



Add a rule condition

To add a rule condition:

1. Select the Add button below the Rollup Rules list.
2. Select the **Child Set** from the Rollup Rule Properties:
 - **All** (default): The Condition rule is evaluated when the status of ALL children meet the condition.
 - **Any**: The Condition rule is evaluated when ANY child status meets the condition.
 - **At least Count**: The Condition rule is evaluated when the status of AT LEAST the number of children items entered meets the condition.
 - **At least Percent**: The Condition rule is evaluated when the status of AT LEAST the percentage of children items entered meets the condition.
 - **None**: The Condition rule is evaluated always.
3. Add one or more Conditions to the Rule
4. Select the **Add** button to add the rule to the Rule list.

Rollup Rule Combinations

Individual rule conditions can be combined to create a set of conditions for evaluation such that any one individual condition must be True or all conditions must be True for the resulting action to be triggered. The Rule Combinations may specify that ALL rules or ANY rules apply:

- **Any Condition Match Will Trigger Action** (*default value*) – The condition set evaluates to True if *any* of the individual conditions evaluates to True. Acts as a logical *Or*.
- **All Conditions Must Match** – The condition set evaluates to True if and only if *all* of its individual conditions evaluate to True. Acts as a logical *And*.

Rollup Rule Conditions

The *Rules* list may contain a set of conditions that are evaluated in the context of the activity for which the Rollup Rule is defined. To Add a condition:

1. Select the Add button below the condition list
2. Set the Condition Operator:
 - **Match:** Condition "Matches" or is TRUE.
 - **NOT Match:** Condition "DOES NOT Match" or is FALSE.
3. Select the Condition:

Satisfied: The Condition evaluates to True if the Objective Progress Status for the rolled up objective associated with the child activity (indicated by the Rule Condition Referenced Objective) is True and the Objective Satisfied Status for the rolled up objective associated with the child activity (indicated by the Rule Condition Referenced Objective) is True.

Objective Status Known: The Condition evaluates to True if the Objective Progress Status for the rolled up objective associated with the child activity (indicated by Rule Condition Referenced Objective) is True.

Objective Measure Known: The Condition evaluates to True if the Objective Progress Status for the rolled up objective associated with the child activity (indicated by Rule Condition Referenced Objective) is True and the Objective Measure Status for the rolled up objective associated with the child activity (indicated by Rule Condition Referenced Objective) is True.

Completed: The Condition evaluates to True if the Attempt Progress Status for the child activity is True and the Attempt Completion Status for the child activity is True.

Activity Progress Known: The Condition evaluates to True if the Activity Progress Status for the child activity is True and the Attempt Progress Status for the child activity is True.

Attempted: The Condition evaluates to True if the Activity Progress Status for the child activity is True and Activity Attempt Count for the child activity is positive (i.e., the activity has been attempted).

Attempt Limit Exceeded: The Condition evaluates to True if Activity Progress Status for the child activity is True and the Limit Condition Attempt Limit Control for the child activity is True and the Activity Attempt Count for the child activity is equal to or greater than the Limit Condition Attempt Limit for the child activity.

None: The Condition always evaluates to False

4. Select the ADD button to add the condition to the condition list.

Rollup Rule Actions

Each condition when TRUE triggers an action. Select the action from the action drop down list for each condition. Possible actions include:

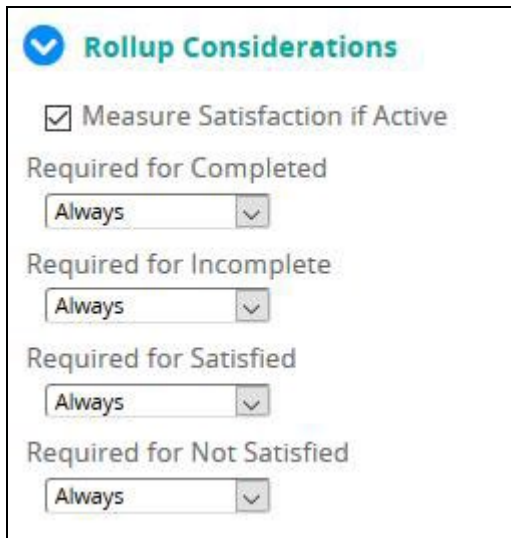
- **Completed:** set the status to Completed.
- **Incomplete:** set the status to Incomplete.
- **Not Satisfied:** set the status to Not Satisfied.

- **Satisfied:** set the status to Satisfied.

Rollup Considerations

Rollup considerations provide advanced settings that allow setting rollup based on specific status of the activity. By default, all child activities in a cluster are always included in their parent's rollup unless the activities are not tracked, or the activities do not contribute at all to rollup (i.e., the activity is NOT REQUIRED). Measure Satisfaction if Active is ON by default and the activity rollup is "Always" considered unless the settings here are changed.

Rollup evaluations will not be performed if any child activity has a status of "unknown". This can be problematic when activities are skipped, suspended, or disabled. Rollup consideration settings provide a way to specify more specifically when to include a child activity if it is REQUIRED for Completed, Incomplete, Satisfied, or Not Satisfied status:



- Always (default): The child activity always contributes to the rollup evaluation of its parent.
- If Attempted: The child activity contributes to the rollup evaluation of its parent only if it has been attempted.
- If NOT Skipped: The child activity contributes to the rollup evaluation of its parent only if it is not skipped at the time of the evaluation.
- If NOT Suspended: The child activity contributes to the rollup evaluation of its parent only if it has been attempted, but NOT suspended at the time of the evaluation.
- The "Required for Rollup" elements will have no effect on an activity that is explicitly NOT included in its parent's rollup by defining "Tracked" or "REQUIRED" (Rollup Objective Satisfied and Rollup Progress Completion) to be FALSE.

Constrain Choice Controls

Parent activities in a cluster can constrain choice, if desired. By default, unconstrained Choice is always allowed (users may select any item in a cluster in any order). In special cases, users may want to restrict users ability to choose or activate content by setting these values to ON.

☒ **Constrain Choice Controls**

☐ Constrain Choice

☐ Prevent Activation

Constrain Choice: Setting this value to ON restricts user choice to allow selecting ONLY the next logical activity in the "flow" from the current activity.

Prevent Activation: Setting this value to ON restricts user choice to allow selecting ONLY descendants of the current activity if the activity is already active. Any inactive items cannot be selected.

Delivery Controls

Delivery controls control how content is delivered in Rival Learn. By default, all content is tracked, but there may be rare instances where tracking users' interaction with content is not required.

☒ **Delivery Controls**

☒ Tracked

By default, Rival Learn always uses any communication from a content activity to determine progress and objective status, so "Completion Set By Content" and "Objective Set By Content" are set to ON. Setting "Completion Set By Content" and "Objective Set By Content" to OFF means an activity's Completion and Objective status will be set when the activity has fully rendered in the content page.

Limit Conditions

Limit conditions provide a field to define any attempt limit if developers wish to create rules based on the maximum number of attempts on the activity.

☒ **Limit Conditions**

Attempt Limit

Navigation

Navigation data is displayed for those imported SCOs that provide a Block Choice Identifier or Launch Data to an external web server.


Navigation

Block Choice Identifier

Launch Data

Viewing content with sequencing rules (activity tree)

When sequencing and rollup rules are defined in a Rival Learn content object, the activity tree provides information about the current status to users:



An absence of a color check mark beside an activity indicates content that has not been viewed or interacted with.



A red X beside an activity or a red globe on the content object indicates content that is scored and the user has not met the mastery requirement.



A purple check mark beside an activity or a purple globe on the content object indicates content whose status is unknown. This is most often because the user has not interacted with the content to define its status.



An amber check mark beside an activity or an amber globe on the content object indicates content whose status is incomplete.



A green check mark beside an activity or a green globe on the content object indicates content whose status is complete. This is most often because the user has either completed all the required content and/or has passed the mastery requirements for scored items.

Status as the result of applying a sequencing rule provides additional information to users:



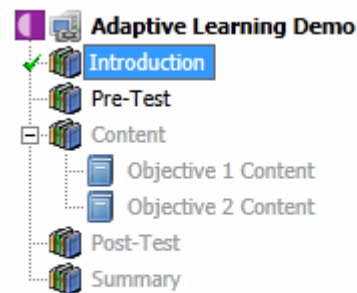
A white check in a gray square indicates a SKIP action. Users may select these activities, but when navigating to such items, users will skip over them.



Activities with normal text can be selected or navigated to by users



Activities with grayed text are disabled and cannot be selected or navigated to.



Troubleshooting sequencing rules

Testing sequencing rules can be difficult without being able to analyze what rules are set and the data values for each of the objectives in the object.

Using the Troubleshooting skin

Rival Learn provides a Troubleshooting skin that reads and displays the values for all objectives and conditions applied in the object.

Select the Troubleshooting skin from the preview content object window to view your object.

Adaptive Learning Demo

- Introduction**
- Pre-Test
- Content
 - Objective 1 Content
 - Objective 2 Content
- Post-Test
- Summary

SCORM Debug
AICC Debug

Introduction

This course demonstrates a simple adaptive learning module where users have the ability to complete a diagnostic pre-test to test their knowledge on the module topics.

If users demonstrate mastery of content related to Objective 1, they can skip Objective 1 content. Otherwise, they must view Objective content prior to completing the Post-Test.

When they complete the Post-Test, they can view the Summary page.

If they fail the Post-Test, users are required to review appropriate content before they are allowed to continue.

Select NEXT to proceed to the Pre-Test

SCORM Debug

Select SCORM Debug to launch the SCORM Debug audit. This audit displays all data communication between a SCORM SCO and Rival Learn.

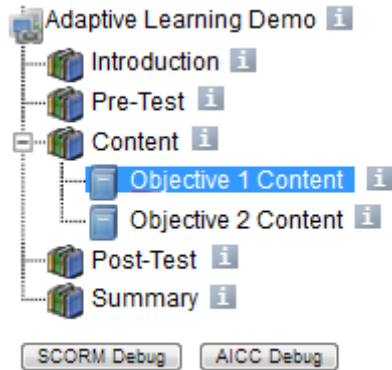
AICC Debug

Select AICC Debug to launch the AICC Debug audit. This audit displays all data communication between an AICC SCO and Rival Learn.



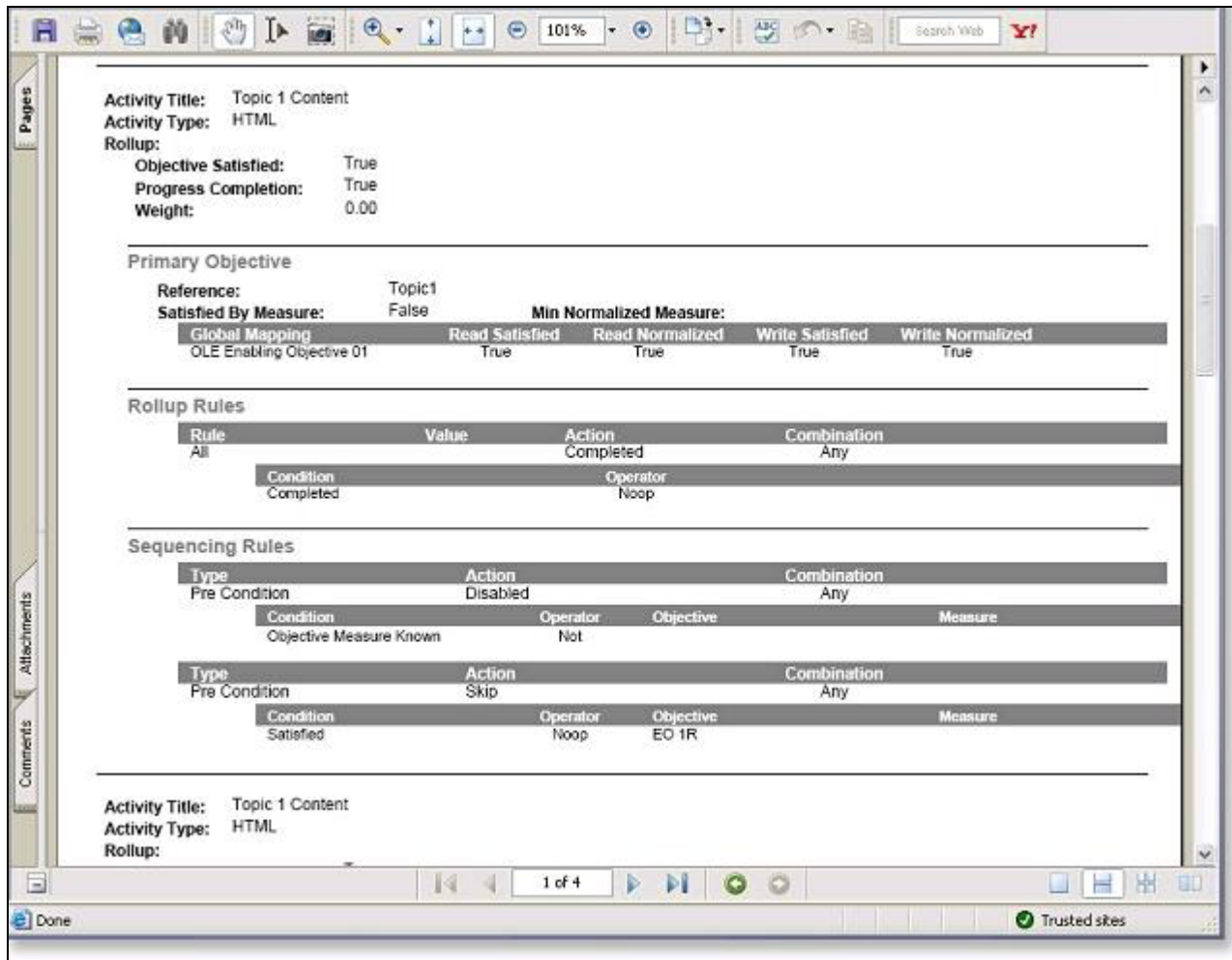
Select the **Information icon** to the right of the tree item to view debug data for each activity.

The current status of all object objectives and sequencing rules are displayed for the selected cluster or leaf node. For example:



Using the Content Detail Report

The Content Detail Report displays the rules and associated objectives and conditions applied in the object. Use this report to review a printout of the currently applied rules for the object or eCourse.



Activity Title: Topic 1 Content
Activity Type: HTML
Rollup:
Objective Satisfied: True
Progress Completion: True
Weight: 0.00

Primary Objective
Reference: Topic1
Satisfied By Measure: False
Min Normalized Measure:

Global Mapping	Read Satisfied	Read Normalized	Write Satisfied	Write Normalized
OLE Enabling Objective 01	True	True	True	True

Rollup Rules

Rule	Value	Action	Combination
All		Completed	Any
Condition	Completed	Operator	Noop

Sequencing Rules

Type	Action	Combination
Pre Condition	Disabled	Any
Condition	Operator	Objective
Objective Measure Known	Not	Measure

Type	Action	Combination
Pre Condition	Skip	Any
Condition	Operator	Objective
Satisfied	Noop	EO 1R

Activity Title: Topic 1 Content
Activity Type: HTML
Rollup:

1 of 4

Done Trusted sites